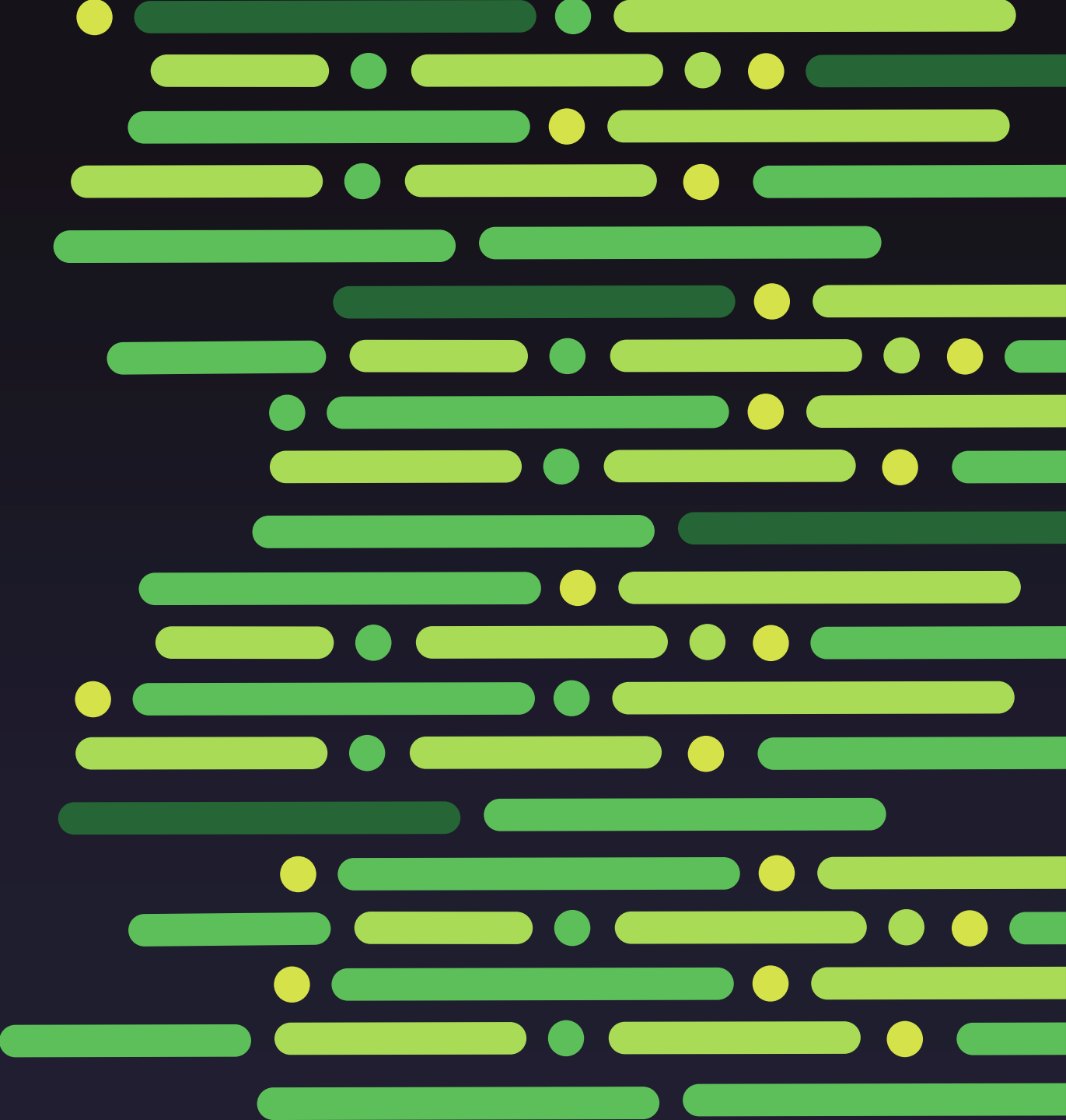


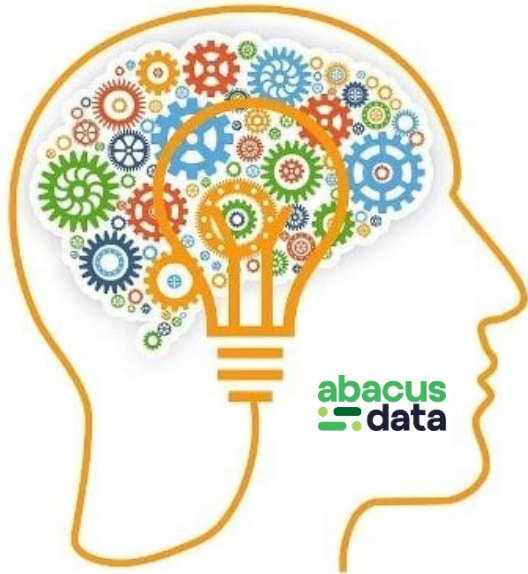
# Public Opinion in Niagara and Niagara-on-the-Lake

NOTL Tourism Group

September 2024



# CANADA'S MOST SOUGHT AFTER AND INFLUENTIAL VOICE IN EXPLAINING PUBLIC OPINION, POLITICAL BEHAVIOUR, AND OUR SOCIETY IN CANADA.



Founded in **2010**

**14** Research Professionals

Official pollster for the **Toronto Star**

Located in **Ottawa, Toronto, London, Hamilton and Edmonton**

## TOURISM AND QUALITY OF LIFE EXPERIENCE



# Methodology

- Random telephone survey of NOTL residents; random online survey of Niagara residents
- Sample size: 521 Niagara residents, and 302 Niagara-on-the-Lake residents
- Margin of error: Niagara +/- 4.29% and Niagara-on-the-Lake +/- 5.64%, 19 times out of 20.
- Survey field dates: July 11 to 29, 2024
- Totals may not add up to 100 due to rounding.

**PREVIOUS STUDY: FEB 23 TO MAR 6, 2022**





# Research Objectives

The purpose of this study was to:

- Understand how residents of Niagara-on-the-Lake and the wider Niagara Region feel about their quality of life
- Examine the impact that tourism has on their life and the broader communities
- Assess whether they feel their community can be both a tourism destination and a great place to live.



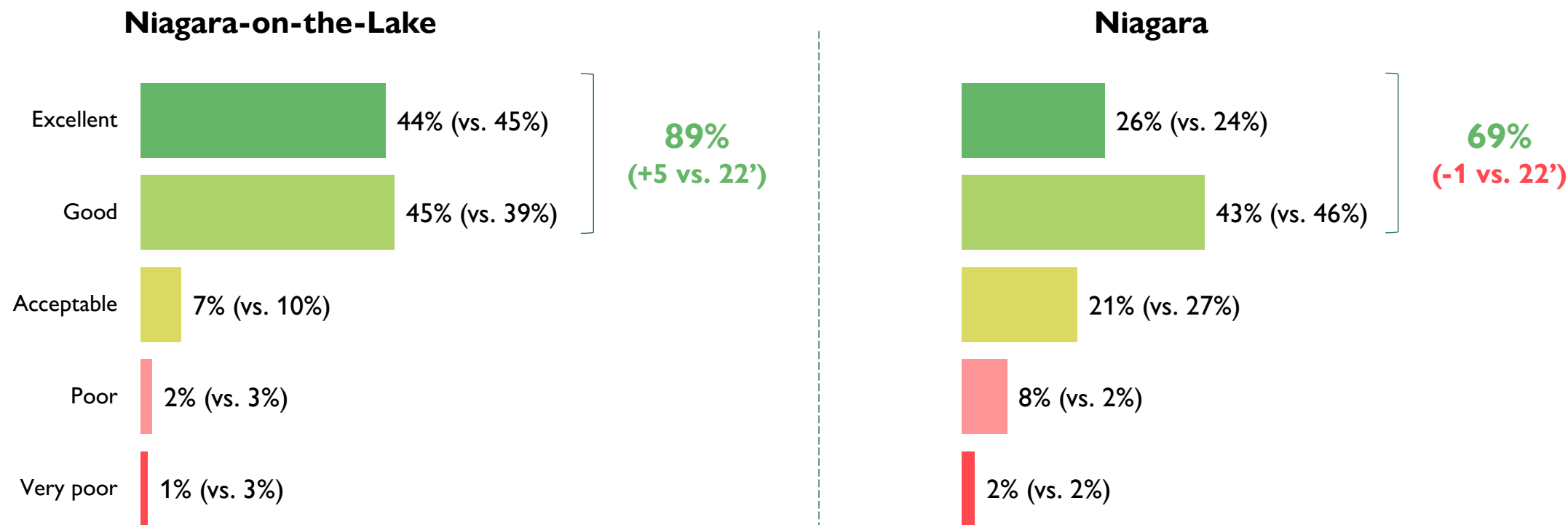
# Life in Niagara-on-the-Lake





Overall, how would you describe the overall quality of life in...?

## QUALITY OF LIFE IN NOTL AND THE NIAGARA REGION



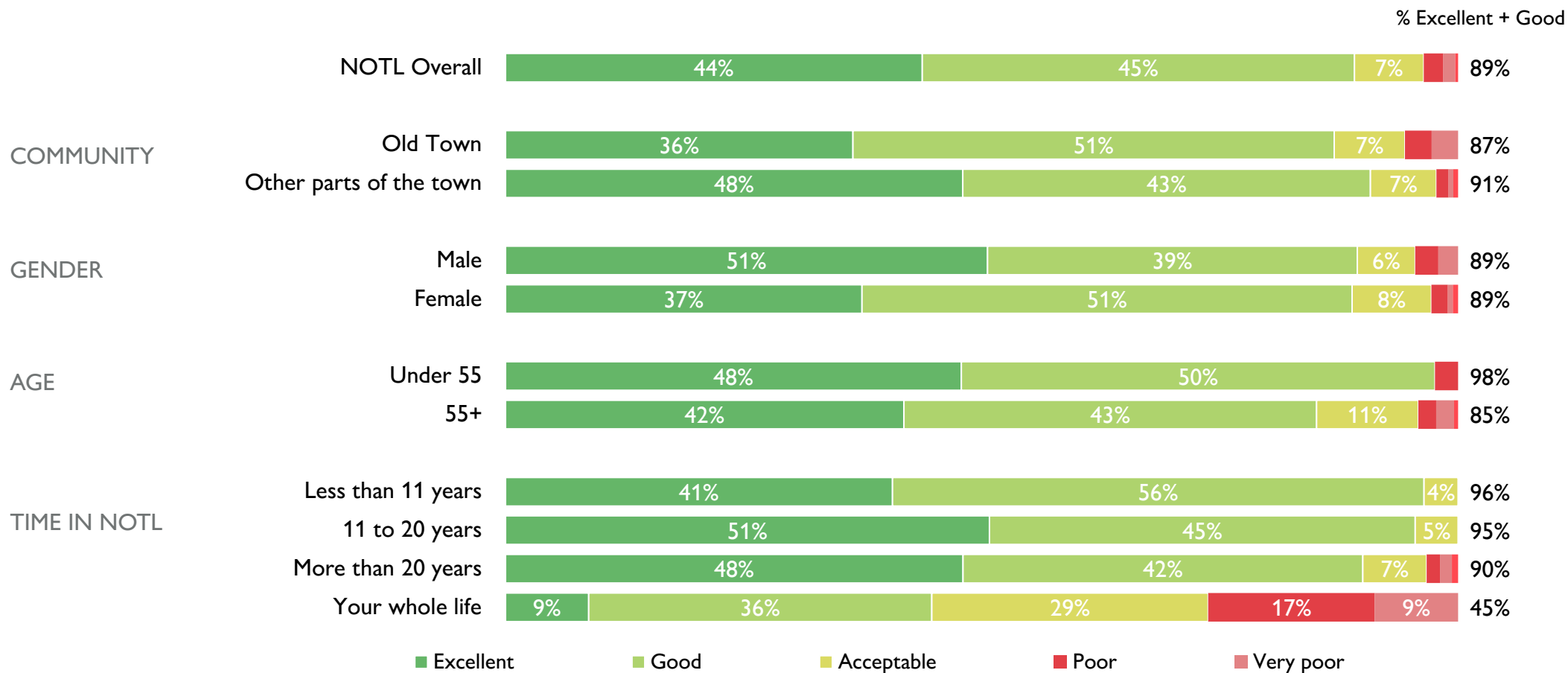
Base Niagara n = 521 | Base NOTL n = 302 | Data in parenthesis is from the May 2022 report





Overall, how would you describe the overall quality of life in...?

## NOTL: QUALITY OF LIFE



Base NOTL n = 302

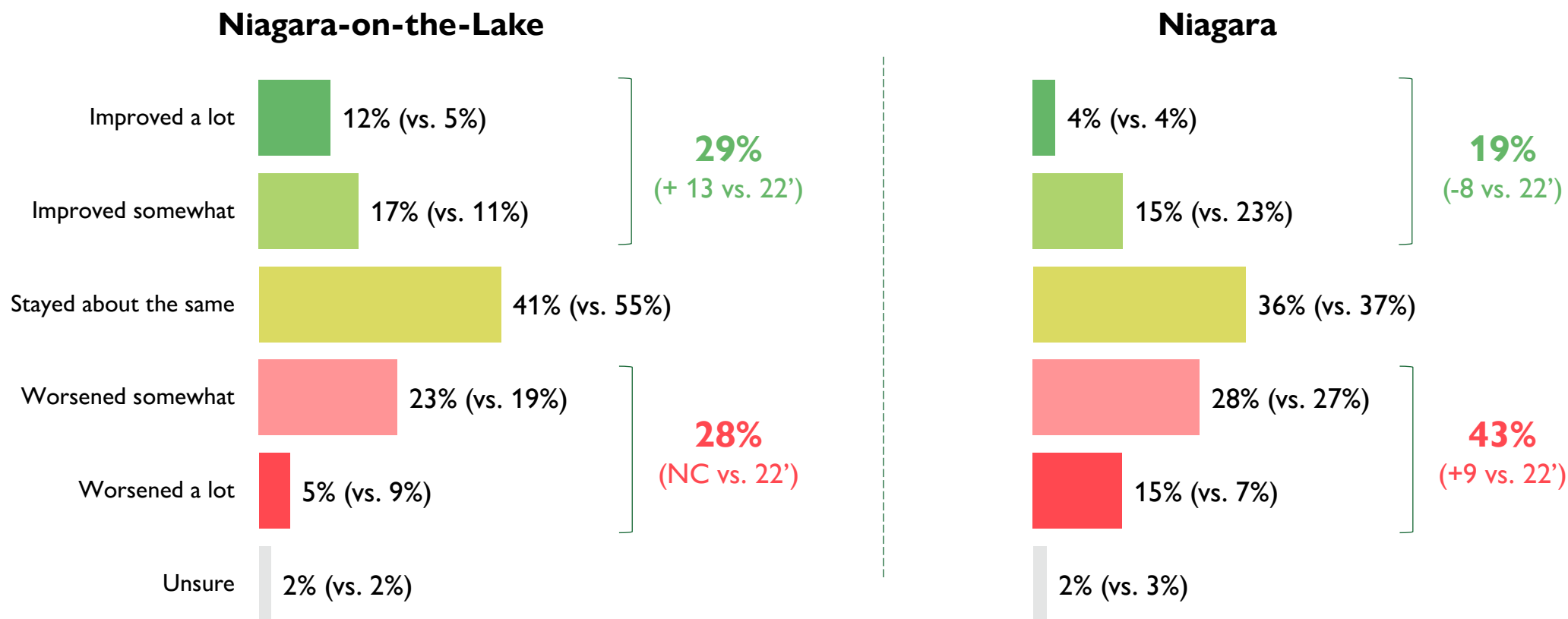






Over the past few years, would you say the quality of life in the town / Niagara Region has...?

**70% of residents feel their quality of life has stayed the same or improved, compared to just 55% of residents in the Niagara Region.**



Base Niagara n = 521 | Base NOTL n = 302 | Data in parenthesis is from the May 2022 report



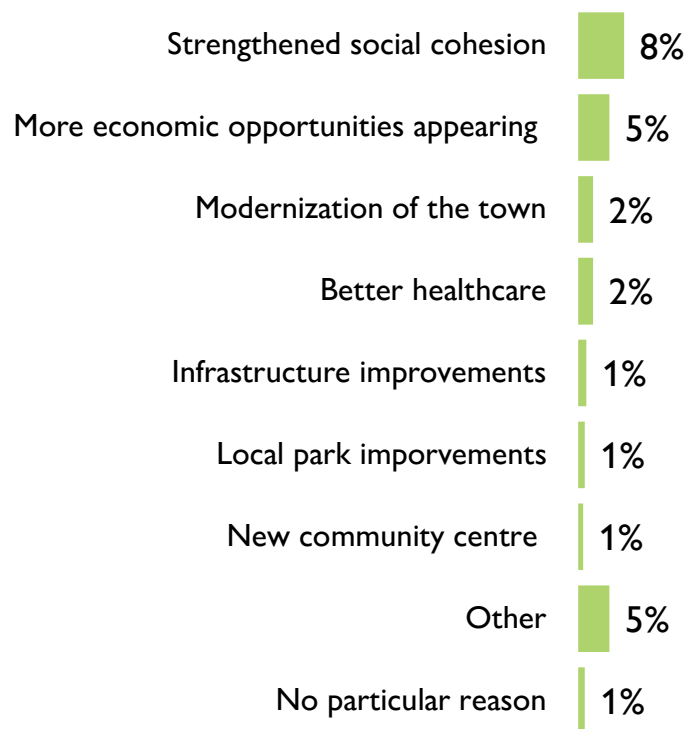




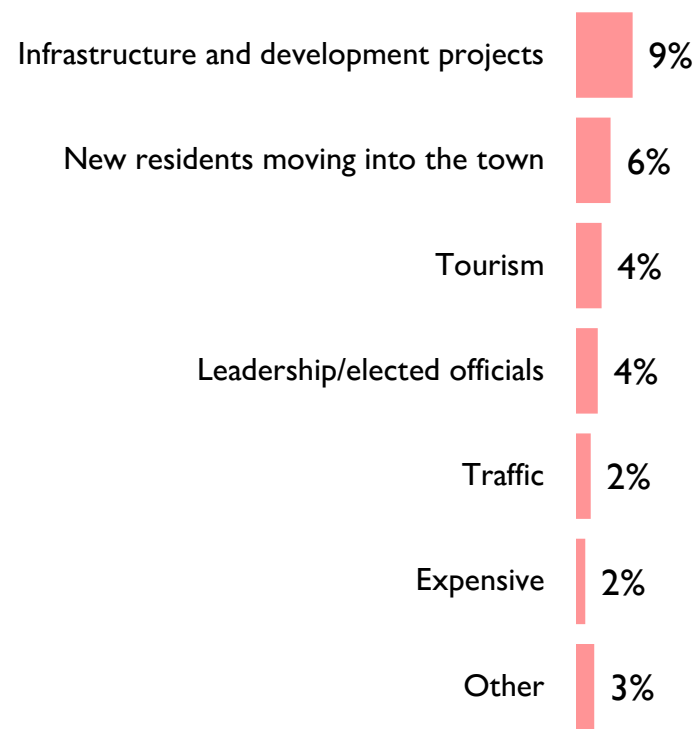
Why do you feel that the quality of life in the town/region has improved / WORSENEED? [open-ended]

## CHANGES IN QUALITY OF LIFE IN RECENT YEARS

### PERCEPTION OF WHY QUALITY OF LIFE HAS **IMPROVED**



### PERCEPTION OF WHY QUALITY OF LIFE HAS **WORSENEED**



Base NOTL n = 81, those who feel that the quality of life has improved; Base NOTL n = 90, those who feel that the quality of life has worsened;



Thinking about the quality of life in your community, would you say that you are very happy, happy, unhappy or very unhappy about each of the following?

## WHAT DRIVES QUALITY OF LIFE?

### SATISFACTION WITH KEY ELEMENTS OF NOTL



PARKS AND  
GREENSPACE

**94%**

(NC vs. 22')



ATTRACTIONS,  
AMENITIES, AND  
THINGS TO DO

**94%**

(+7 vs. 22')



SENSE OF PEACE  
AND QUIET

**91%**

(+2 vs. 22')



QUALITY OF LOCAL  
INFRASTRUCTURE

**76%**

(-4 vs. 22')



NUMBER OF JOBS  
AND ECONOMIC  
OPPORTUNITIES

**74%**

(NC vs. 22')

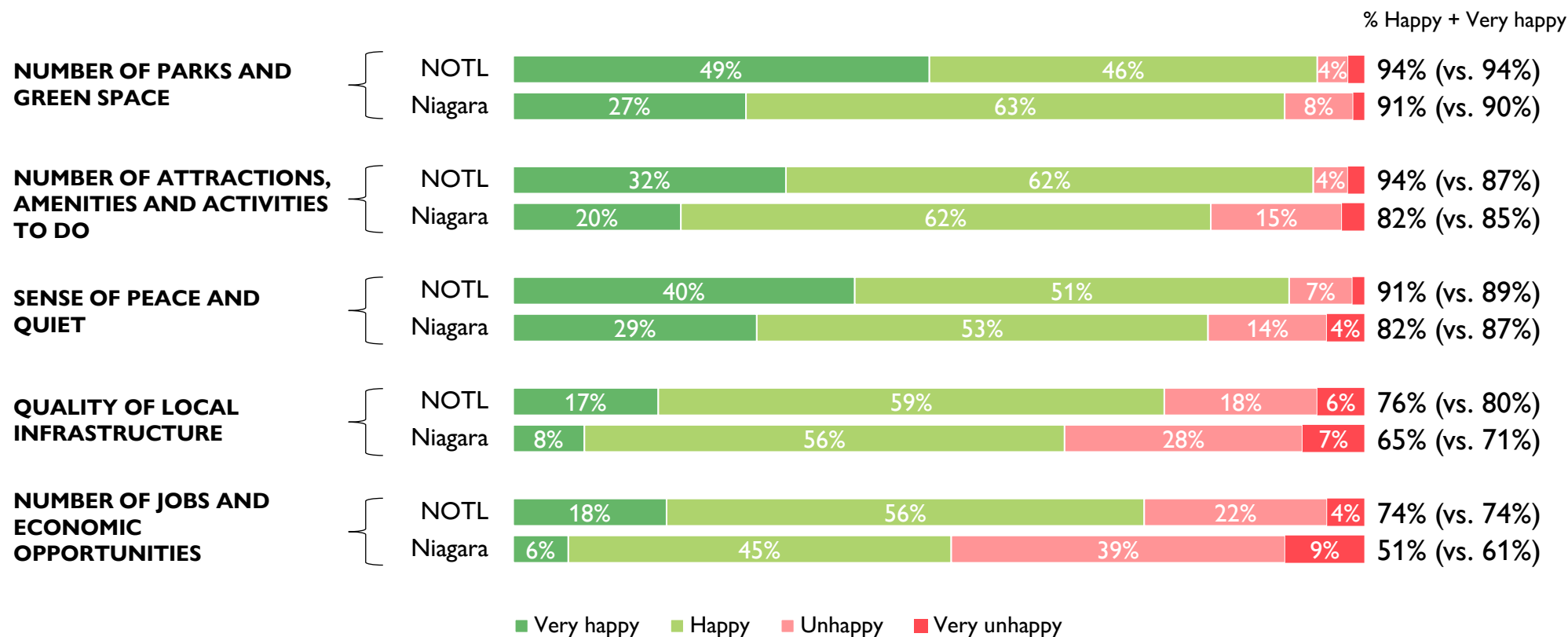
Base NOTL n = 302 | Data in parenthesis is from the May 2022 report





Thinking about the quality of life in your community, would you say that you are very happy, happy, unhappy or very unhappy about each of the following?

## SATISFACTION WITH KEY ELEMENTS OF NOTL / NIAGARA



Base Niagara n = 521 | Base NOTL n = 206-300 (excludes "unsure") | Data in parenthesis is from the May 2022 report

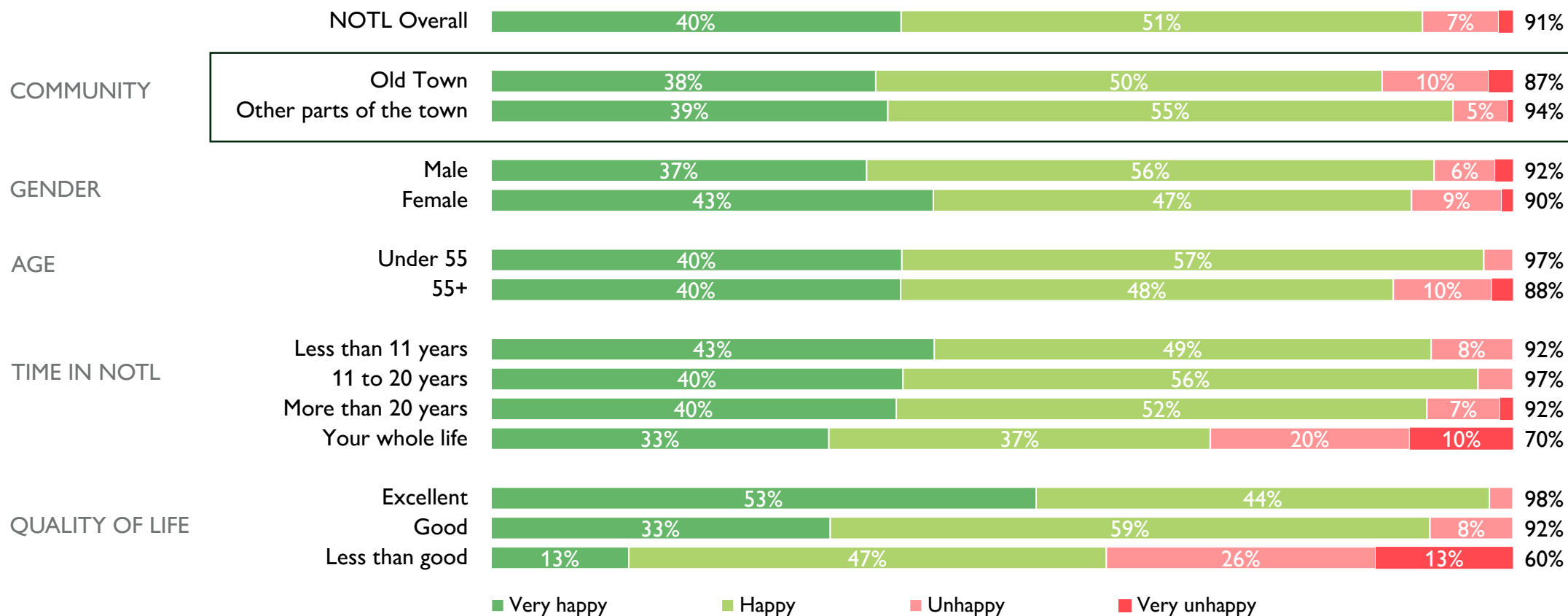




Thinking about the quality of life in your community, would you say that you are very happy, happy, unhappy or very unhappy about each of the following?

## NOTL: SATISFACTION WITH SENSE OF PEACE AND QUIET

% Very happy + Happy



Base NOTL n = 300 (excludes "unsure")



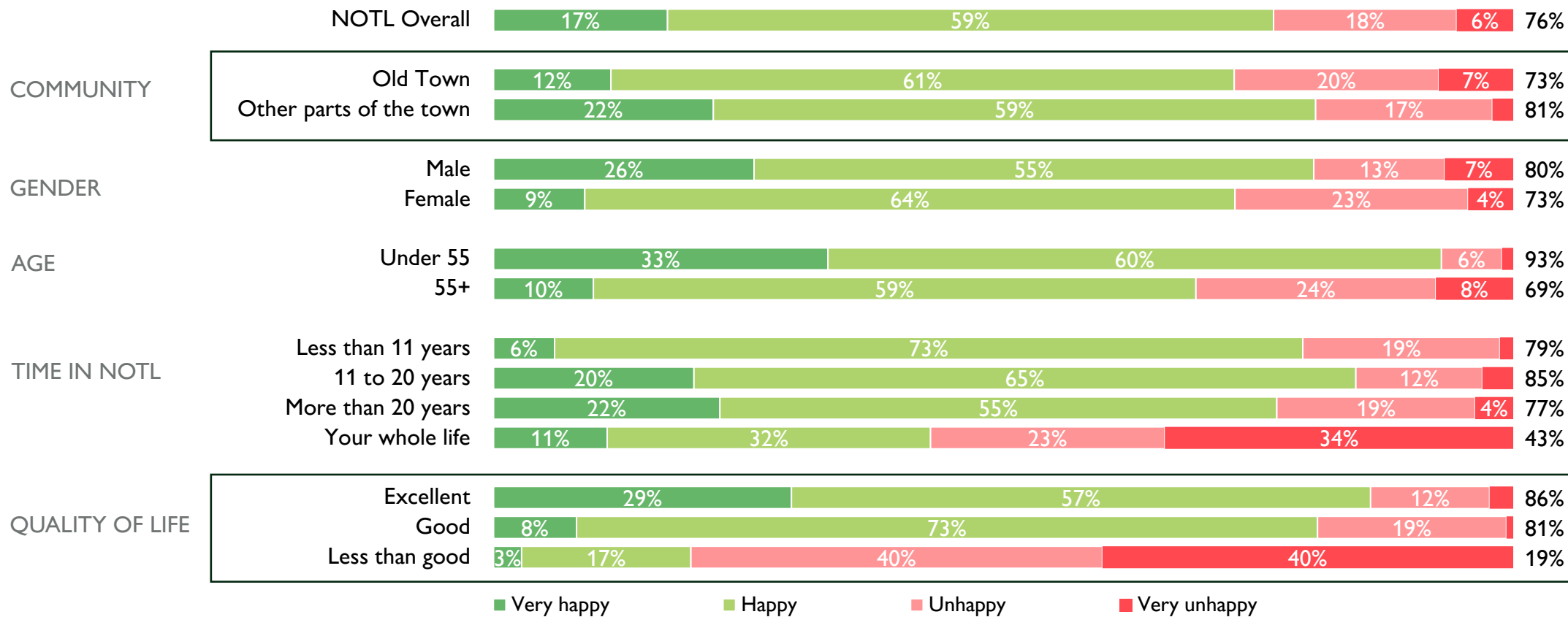




Thinking about the quality of life in your community, would you say that you are very happy, happy, unhappy or very unhappy about each of the following?

## NOTL: SATISFACTION WITH QUALITY OF LOCAL INFRASTRUCTURE

% Very happy + Happy



Base NOTL n = 290 (excludes "unsure")





Thinking about why you stayed in NOTL / the Niagara Region, how important were the following factors?

## WHY DO LONG-TERM RESIDENTS STAY IN NOTL?



GREAT PLACE TO  
LIVE & LOTS TO DO

**80%**

(+9 vs. 22')



GEOGRAPHIC  
LOCATION

**79%**

(+8 vs. 22')



FAMILY LIVES  
HERE

**67%**

(+10 vs. 22')



WORK CLOSE TO  
THE TOWN

**57%**

(NC vs. 22')

Base Niagara n = 324 | Base NOTL n = 156 – those who have lived in Niagara or NOTL for at least 20 years | Data in parenthesis is from the May 2022 report





Thinking about why you moved to NOTL / the Niagara Region, how important were the following factors?

## WHY DID NEWER RESIDENTS COME TO NOTL?



GREAT PLACE TO  
LIVE & LOTS TO DO

**87%**

(+8 vs. 22')



GEOGRAPHIC  
LOCATION

**79%**

(-3 vs. 22')



WORK CLOSE TO  
THE TOWN

**39%**

(+11 vs. 22')



FAMILY LIVES  
HERE

**38%**

(-5 vs. 22')

Base Niagara n = 197 | Base NOTL n = 146 – those who have lived fewer than 20 years in Niagara or NOTL | Data in parenthesis is from the May 2022 report



# Tourism in the Community







Thinking specifically about tourism, how important do you feel the sector is to each of the following? Would you say tourism is very important, pretty important, not that important or not important at all when it comes to...

## NOTL RESIDENTS RECOGNIZE THE IMPORTANCE OF TOURISM TO MANY ASPECTS OF LIFE IN THE TOWN



THINGS TO DO IN  
THE TOWN

**90%**

(+1 vs. 22')



SUSTAINABLE FUTURE  
FOR THE TOWN

**89%**

(-1 vs. 22')



JOBS AND THE  
ECONOMY

**89%**

(NC vs. 22')



QUALITY OF  
INFRASTRUCTURE

**85%**

(+1 vs. 22')

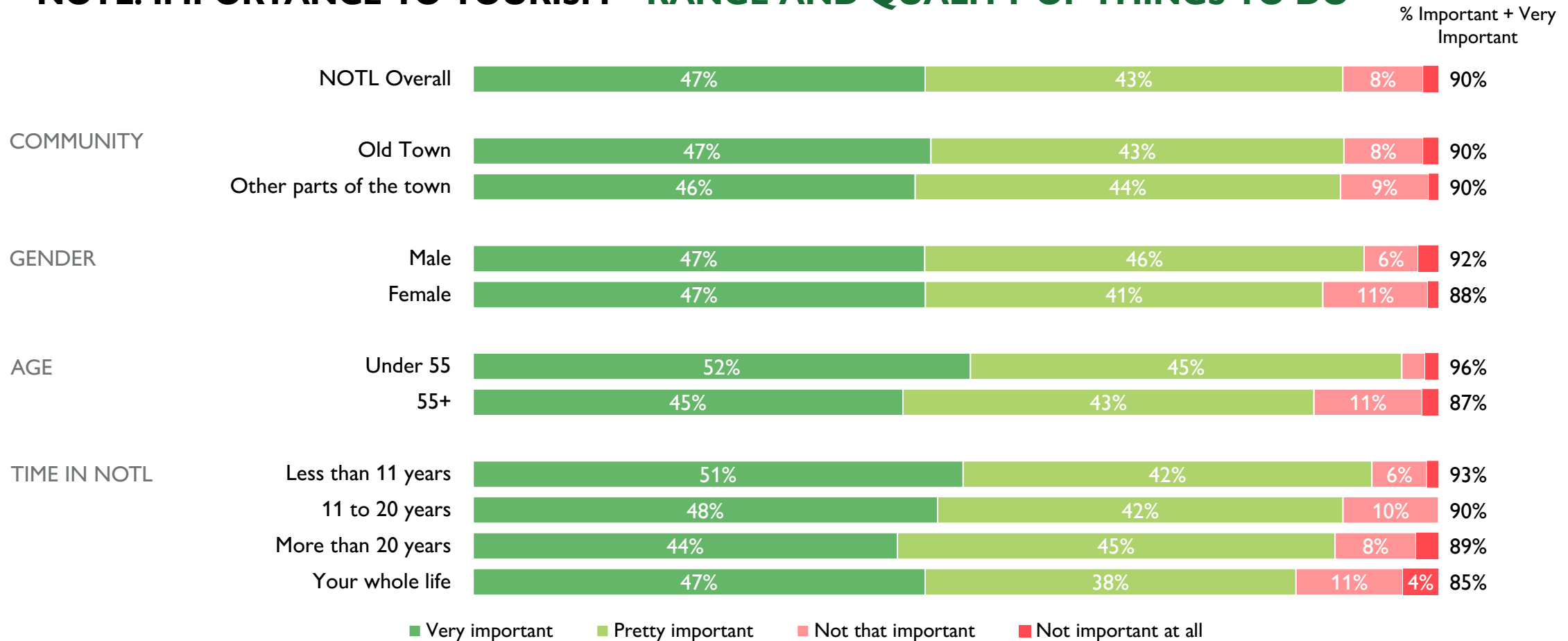
Base Niagara n = 521 | Base NOTL n = 302 | Data in parenthesis is from the May 2022 report





Thinking specifically about tourism, how important do you feel the sector is to each of the following? Would you say tourism is very important, pretty important, not that important or not important at all when it comes to...

## NOTL: IMPORTANCE TO TOURISM – RANGE AND QUALITY OF THINGS TO DO



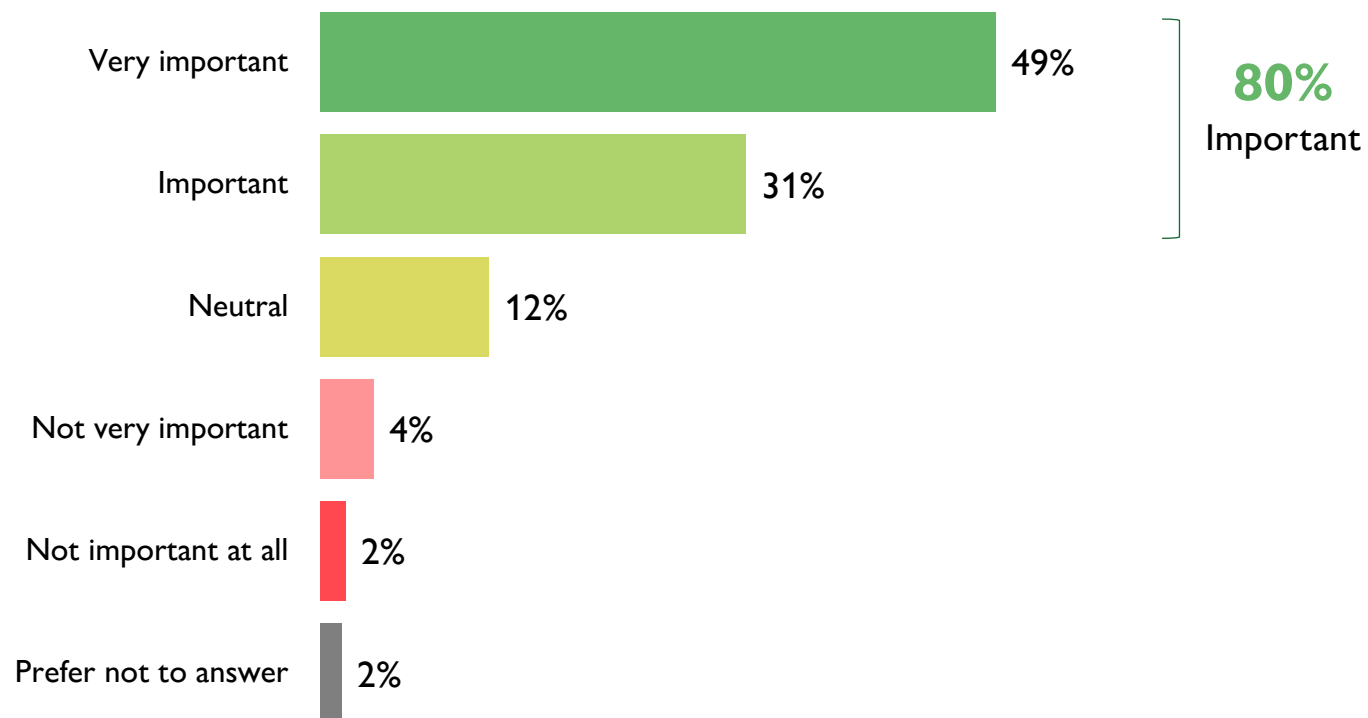
Base NOTL n = 295 (excludes "prefer not to answer")





How important do you think tourism is to the overall character of Niagara-on-the-Lake?

## 8 in 10 residents feel that tourism is important to the overall character of NOTL



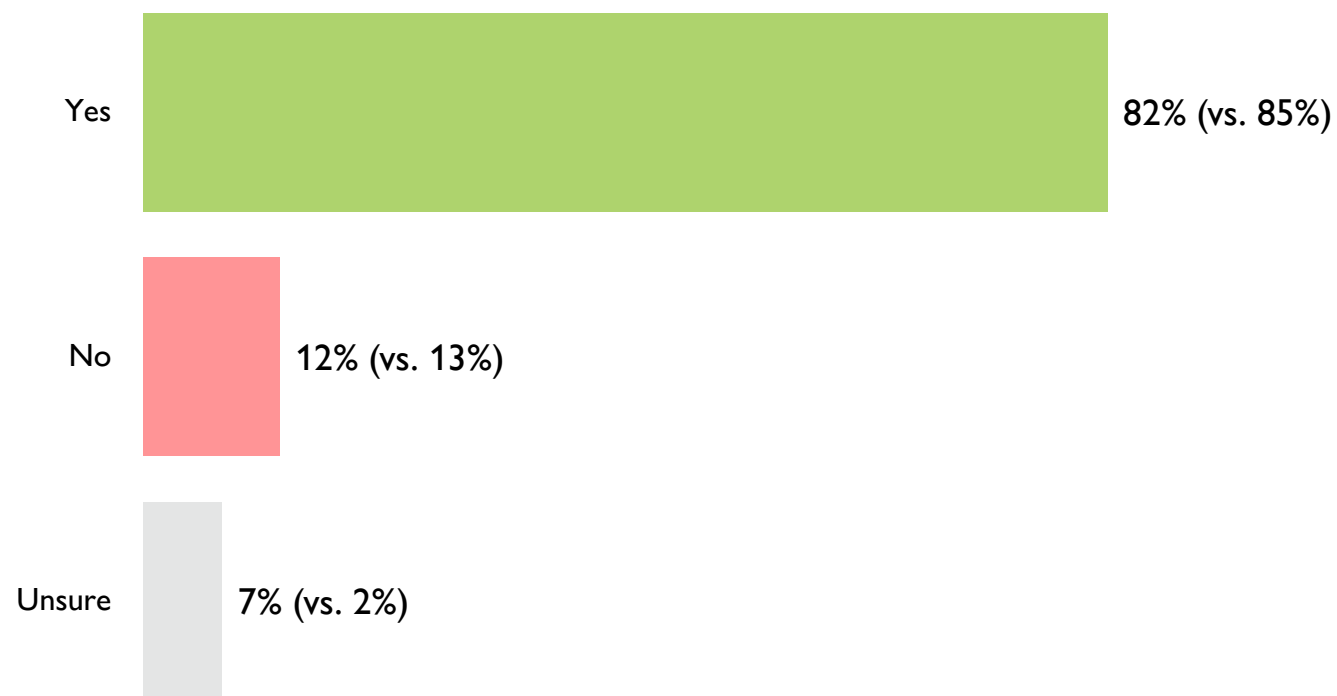
Base Niagara n = 521 | Base NOTL n = 302





Do you think it's possible for Niagara-on-the-Lake to be both a place that attracts a lot of tourists and is a great place to live for residents?

## 8 in 10 residents believe NOTL can be both a place that attracts a lot of tourists and be a great place to live for residents



Base Niagara n = 521 | Base NOTL n = 302 | Data in parenthesis is from the May 2022 report

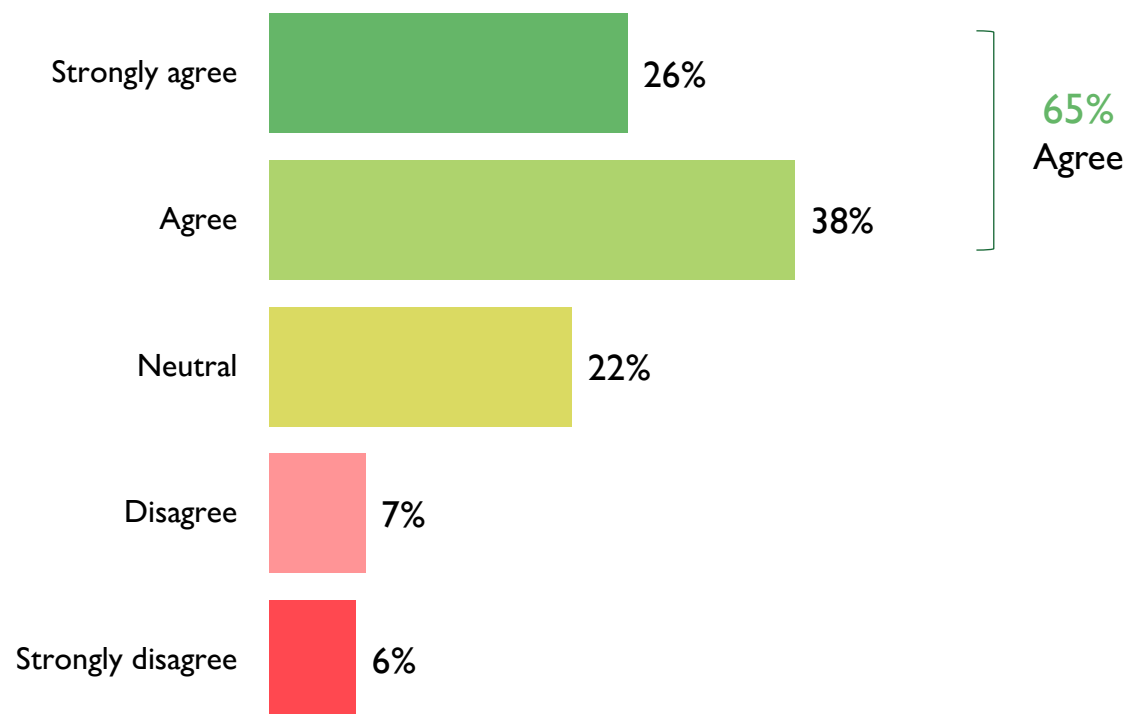







To what extent do you agree that tourism provides infrastructure and amenities that improve quality of life for residents?

**Only 1 in 10 residents do not recognize the significance of tourism in enhancing infrastructure and amenities that contribute to their quality of life.**



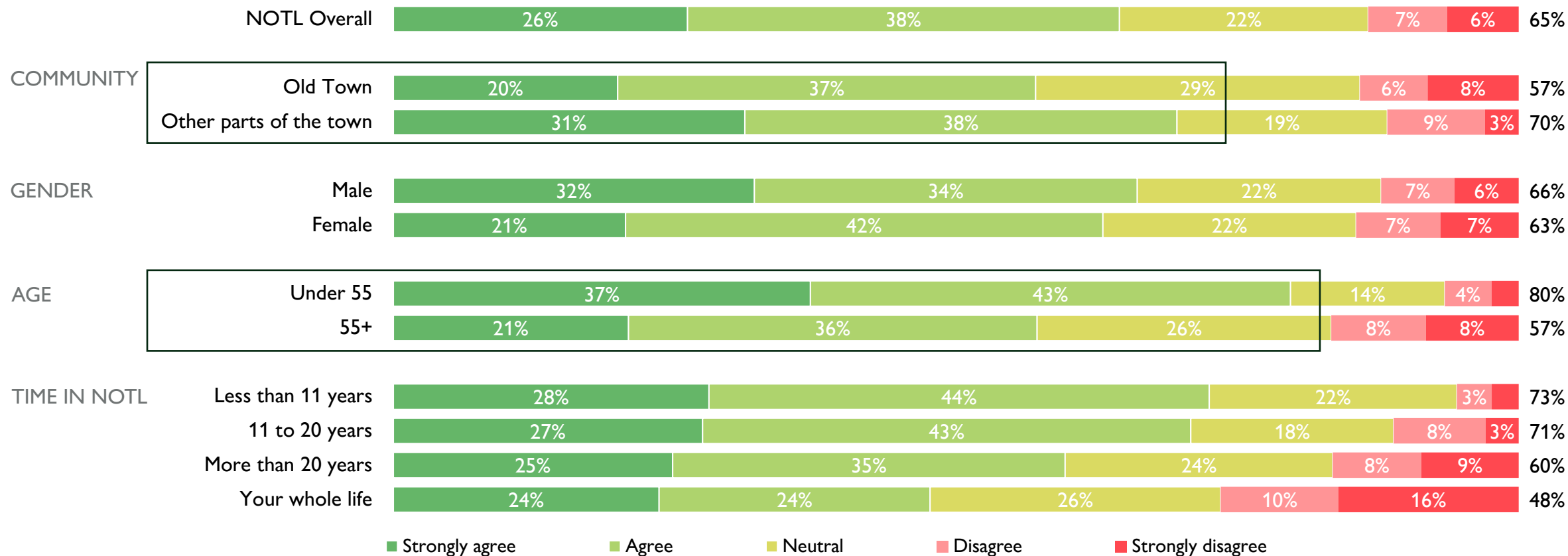
Base Niagara n = 521 | Base NOTL n = 302 – prefer not to answer option removed



 To what extent do you agree that tourism provides infrastructure and amenities that improve quality of life for residents?

## NOTL: EXTENT TO WHICH TOURISM PROVIDES INFRASTRUCTURE AND AMENITIES WHICH IMPROVES QUALITY OF LIFE

% Strongly agree + Agree



Base NOTL n = 297 (excludes "prefer not to answer")

# What Should Town Council Prioritize?





In the past two years, have you noticed improvements in the following areas in the town?

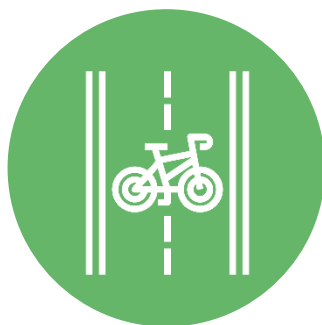
## WHAT IMPROVEMENTS HAVE RESIDENTS NOTICED IN THE LAST 2 YEARS?

### WITNESSED IMPROVEMENTS IN KEY AREAS



ROAD REPAIR AND  
INFRASTRUCTURE

**58%**



BIKE LANES AND  
PATHS

**55%**



EMPLOYMENT  
OPPORTUNITIES

**32%**



TRAFFIC  
CONGESTION

**22%**



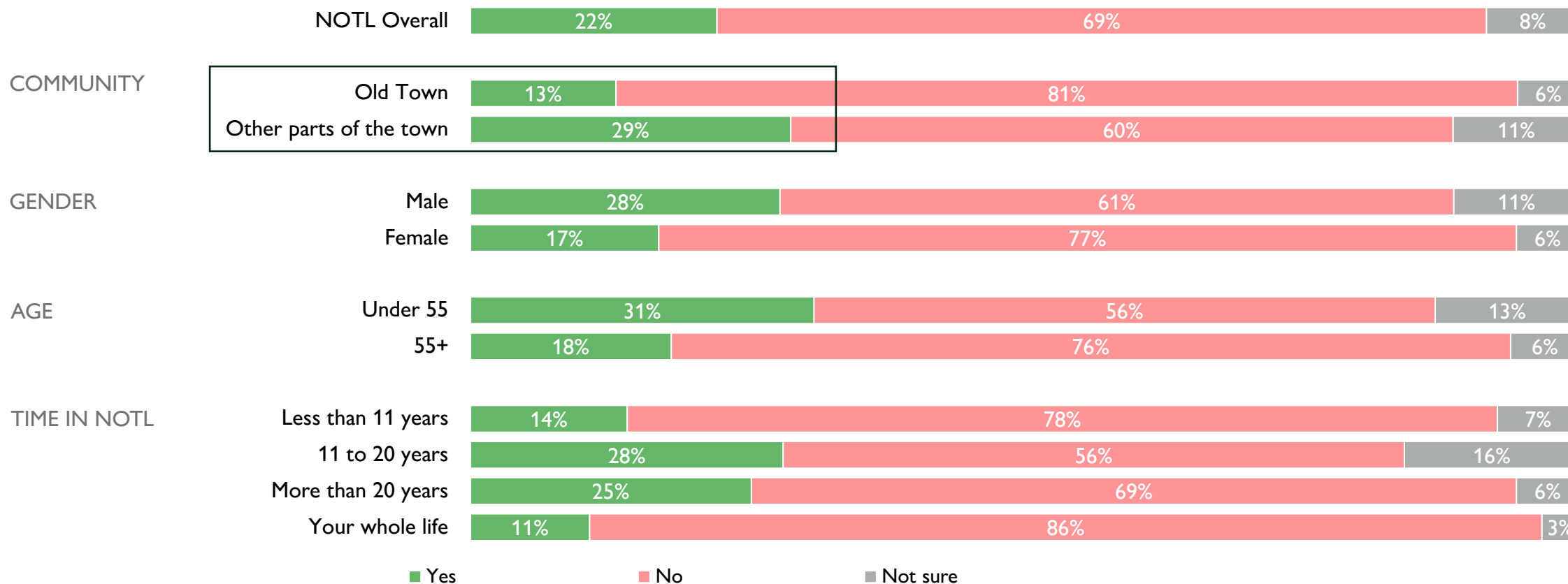
PARKING

**19%**



In the past two years, have you noticed improvements in the following areas in the town?

## NOTL: PAST 2 YEAR IMPROVEMENTS – TRAFFIC CONGESTION



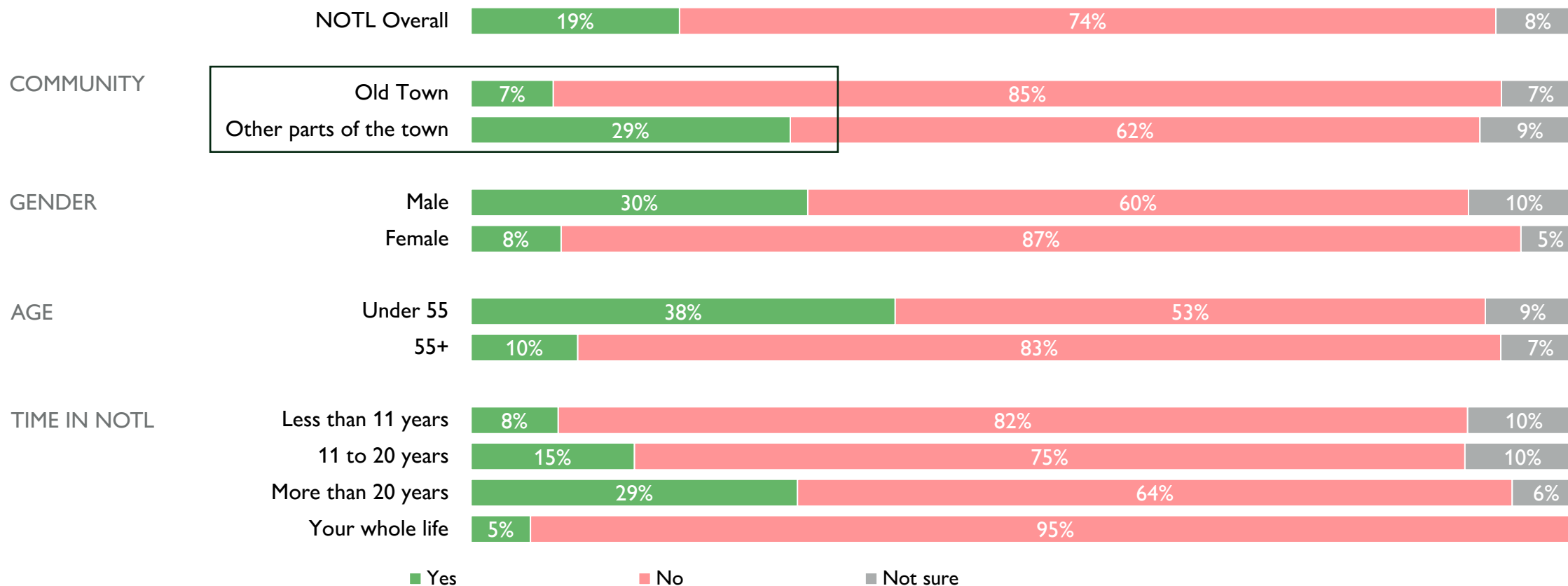
Base NOTL n = 302





In the past two years, have you noticed improvements in the following areas in the town?

## NOTL: PAST 2 YEAR IMPROVEMENTS – PARKING



Base NOTL n = 302





What areas do you believe the Town should focus on to alleviate the impact on residents' daily lives?

## ACCORDING TO RESIDENTS, THE FOLLOWING AREAS SHOULD BE PRIORITIZED

### KEY AREAS THE TOWN SHOULD FOCUS ON



IMPROVE  
PARKING

**66%**



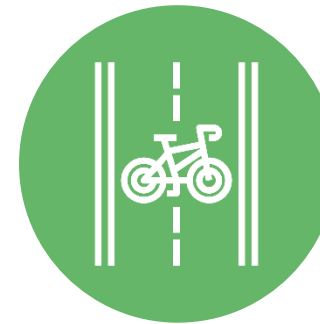
REDUCE TRAFFIC AND  
CONGESTION

**61%**



HOUSING  
AFFORDABILITY

**50%**



IMPROVE BIKE  
LANES/PATHS

**44%**

Base NOTL n = 64 – those who provided a valid response



# Key Insights



## KEY INSIGHTS

- **Why NOTL is a Great Place to Live:** Residents appreciate NOTL for access to well-maintained parks and amenities, peaceful atmosphere, and the economic and cultural benefits of tourism, all of which contribute to their high quality of life.
- **Support for Balanced Growth:** 82% of residents believe that NOTL can successfully balance being a top tourist destination while remaining a great place to live, indicating strong support for tourism in the town.
- **Tourism's Vital Role:** The insights suggest that tourism is deeply embedded in the fabric of NOTL, playing a crucial role in its economy and the quality of life for residents, with 90% of residents recognizing its importance to the town's activities, long-term sustainability, and overall quality of life.
- **Tourism is Too Important to Lose:** Tourism is seen as essential to both preserving the town's unique character and fostering growth, and most residents do not want to see it curtailed, seeing it as an opportunity for growth as well and a way to preserve the town's unique character. It is important to continue to support the growth of tourism and to further enhance NOTL's economic and cultural vibrancy.

# Thank You