



Downtown Cultural Hub Study

Presentation to Planning and Development Council

November 1, 2016

POLLARA 
STRATEGIC INSIGHTS

Method & Sample Size

- Hybrid Telephone & Online Survey of **809 Oakville residents**
 - Phone: Randomly-selected, representative sample of 609
 - Online: Randomly-selected sample of 200 from Canada's largest research panel
 - Ward-based quotas to ensure confident, comparable analysis (n=117-150 per)

Fielding Window

- **March 31 – April 10, 2016**

Statistical Reliability

- As a guideline, the **margin of error for a probability sample of this size is ±3.5%**, 19 times out of 20.
 - Phone and online data combined and statistically weighted to ensure the gender, age, and ward distribution accurately reflects the demographic and geographic characteristics of the entire Town, according to most recent Census

Executive Summary

Cultural Activities and Needs

- Oakville residents **engage in a wide range of cultural activities** from everyday activities (restaurants, TV) to more specific cultural activities (live performances, art exhibitions).
 - Last year, a majority visited downtown, library, festival/event in Oakville. A large minority attended a live performance. One-third attended an art exhibit or cultural program/workshop.
- Most residents believe that there are **enough cultural opportunities in Oakville**, indicating that other barriers besides availability (time, cost, or selection) prevent them from attending more frequently.
- However, past cultural consumption patterns and future consumption intent of residents indicate that **Oakville does not satisfy all of the cultural needs and demands of residents – and that a significant potential market exists for more cultural offerings:**
 - **Many residents visit other municipalities for additional opportunities** (live performances, festivals, visit another downtown centre)
 - **Roughly one-third believe there are not enough** festivals, events, live performances and art exhibitions. Similar number think the city needs more cultural programs and workshops.

Executive Summary

Support for Cultural Investments

- Residents express **widespread initial support (91%)** for municipal investments in facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront.
 - This overall support remains high, but **declines slightly (88%) once the project is described with specifics including potential tax increases**. Support is similar across all wards and demographic groups.
- The waterfront park and trail is the most popular site for investment (95% *support*), but **support never drops below 80% for any of the seven options tested**. Notably, residents express stronger support for investments in **outdoor** facilities than in indoor facilities
- **A slight majority of residents (53%) would like to see aging cultural facilities in Oakville renovated rather than replaced**. Most of the remainder (35%) would like new facilities to be built. If new facilities are built, two-thirds prefer either multiple sites (39%) downtown or at Centennial Square (27%) downtown.

Executive Summary

Funding and Impact Considerations

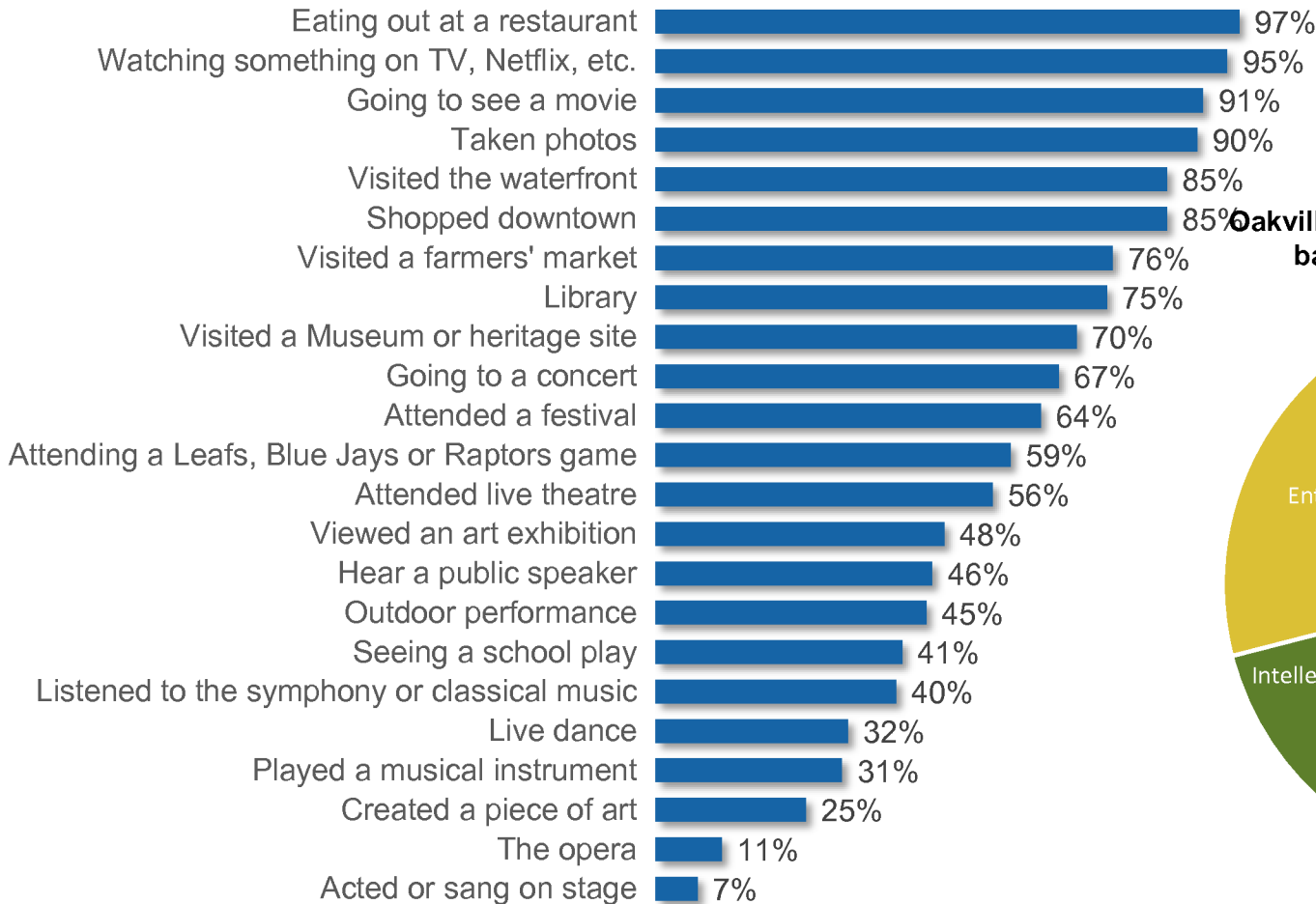
- Residents are split regarding their willingness to pay increased property tax to fund cultural investments. A small majority (55%) support the idea, but only 10% would *definitely* be willing to pay additional property tax. In contrast, 45% oppose the idea including 23% who *definitely would not* be willing to pay additional tax. **Opposition to this option is clearly more intense than support.**
- Additional funding from the provincial and federal governments would make residents more supportive of investments in cultural facilities as would financial contributions from the business community.
- Sale of public land is less likely to increase support.
- Despite limited support for tax increases, large majorities of residents agree that investment in cultural facilities in the town **will make Oakville more livable and is important for the long-term prosperity of the downtown core.**

**Detailed Findings:
Cultural Activities & Needs**

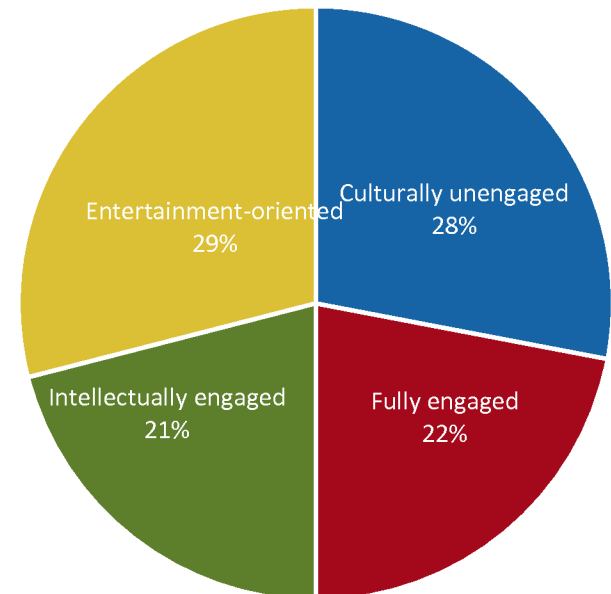
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Cultural interests of Oakville residents

- Many Oakville residents are engaged in cultural activities either as participants or spectators. These range from everyday activities such as eating at restaurants and watching television to more specific cultural activities such as attending live performances and exhibitions.



Oakville residents fall into four segments based on past cultural activities

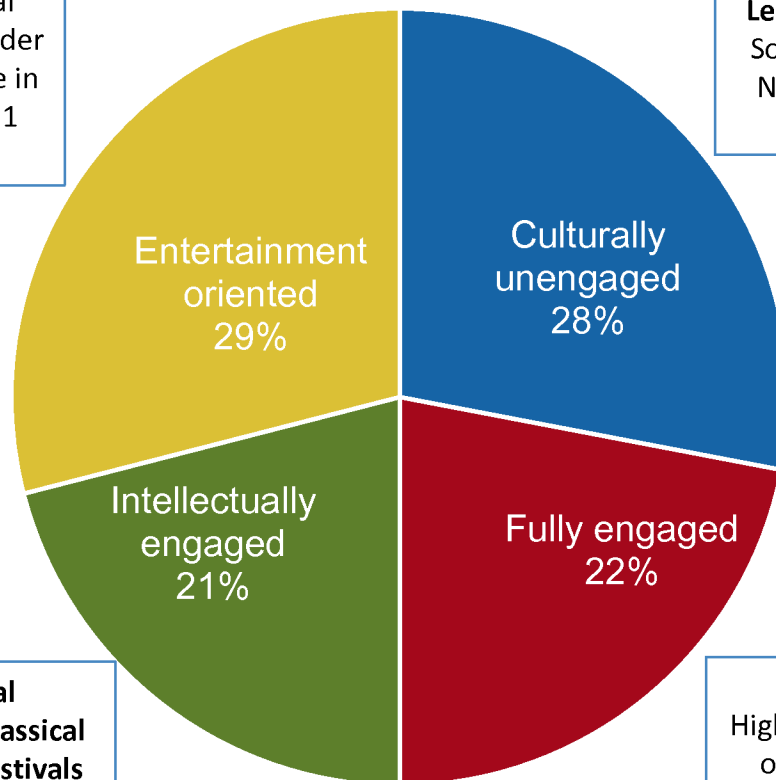


Q. I am now going to read you a list of activities. Please tell me which ones, if any, you have done in the **past five years**? N=807

Cultural segmentation of Oakville residents based on past cultural activities

Engaged in cultural activities **with a focus on sports and concerts**. Less interested in challenging cultural experiences. Younger: 57% are under 35. Middle income. A quarter live in Ward 4. Least common in Ward 1 (9%) and 2 (9%).

Least likely to engage in cultural activities. Somewhat older. Middle to Lower income. Nearly three-in-ten live in Ward 6 (28%). Least common in Ward 1 (8%)



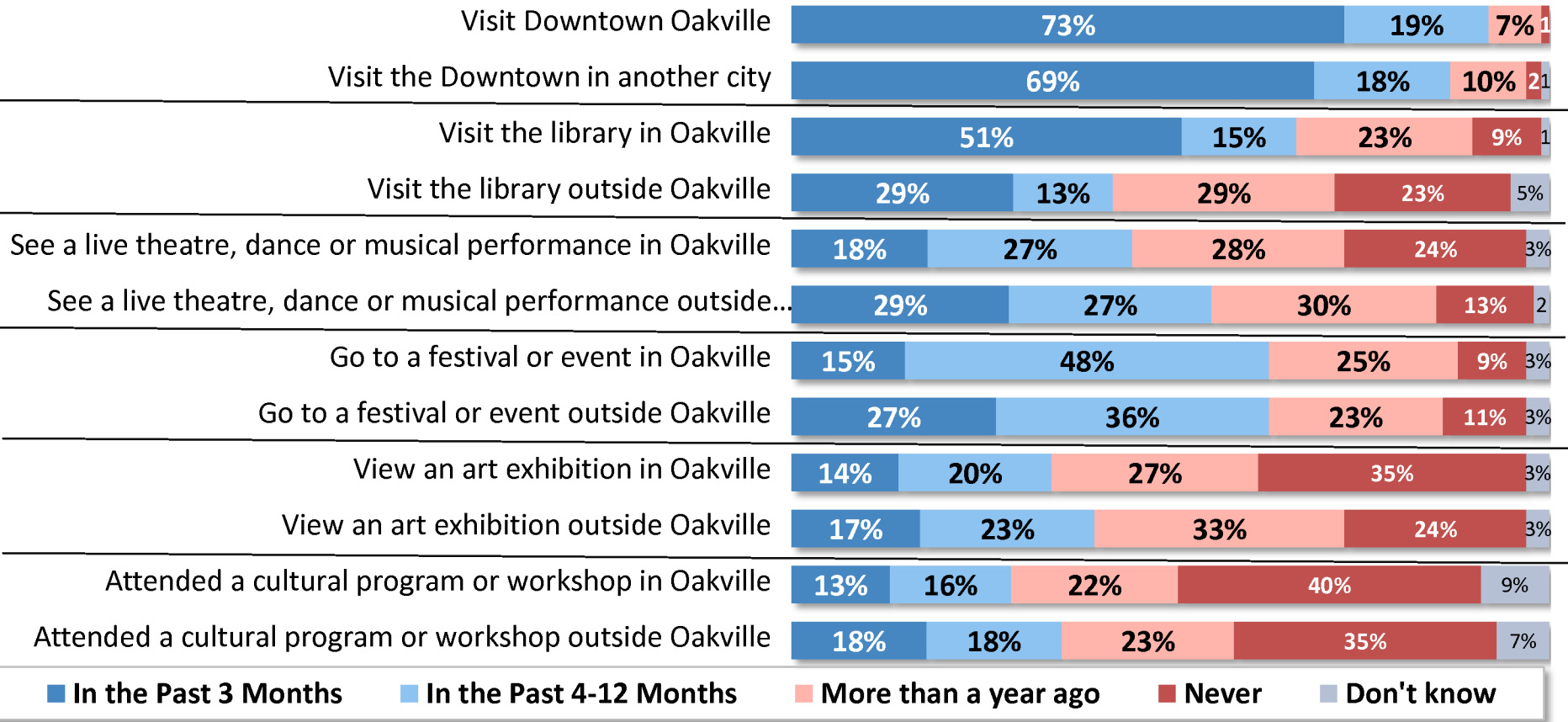
Widely engaged with **cultural experiences such as art shows, classical music, outdoor performances, festivals and the library** Less interested in **sports and concerts**. Equal income and age distribution. Third live in Ward 5 (32%). Less common in Wards 2 (6%) and 4 (6%).

Most likely to engage in all activities. Higher income. More middle age bracket. Almost one-half have graduate degrees. Most live in Wards 3 (28%) and 5 (24%). Least common in Wards 2 (9%) and 4 (9%).

Q. I am now going to read you a list of activities. Please tell me which ones, if any, you have done in the **past five years**?

Cultural events attendance (inside and outside Oakville)

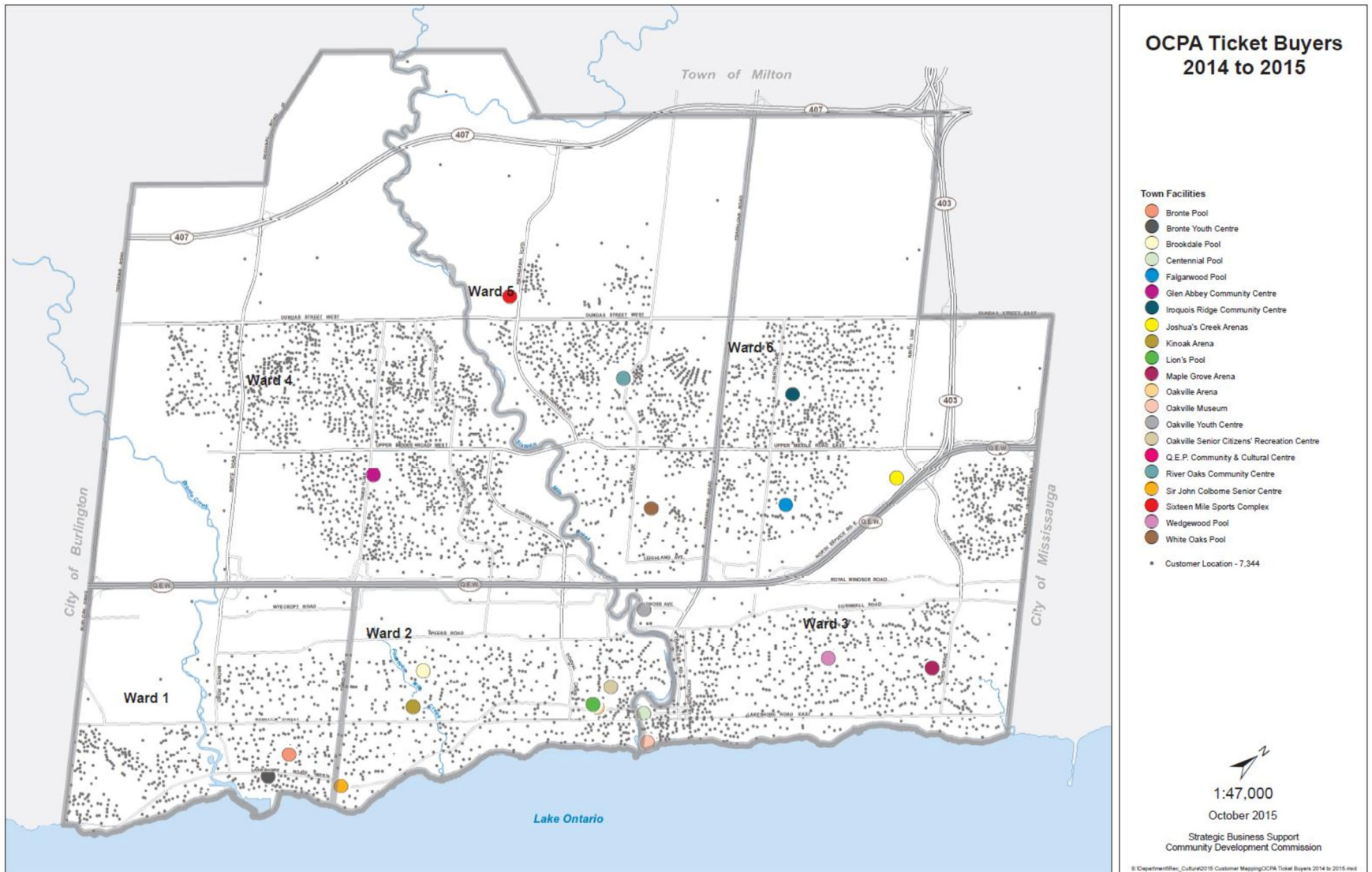
- Last year, the majority of residents visited downtown, the library, and a festival or event.
- The results below indicate there is a demand for more cultural activities than are currently available in Oakville and a significant potential market for such activities if they were available in the city.
- Residents are most likely to leave the city for live performances and festivals and/or to visit another downtown centre. These trends do not differ significantly by demographic groups.



When was the last time you or a member of your household did the following? N=528

Performing Arts Ticket Buyers Distribution Map:

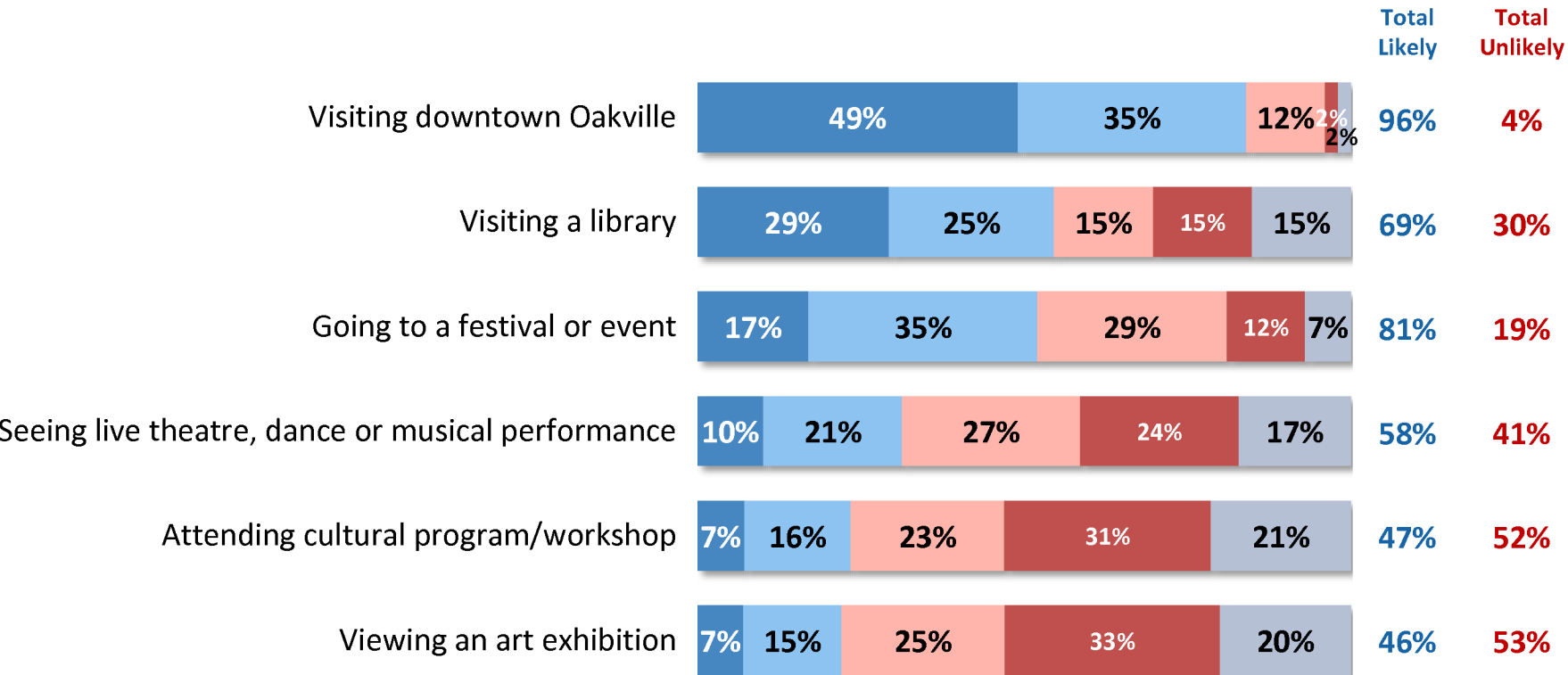
Ticket buyers distributed widely throughout Oakville; No evident clustering



Data source: Strategic Business Support Community Development Commission, October 2015

Likelihood of attending various cultural events in Oakville (next 12 months)

- Likelihood to attend is not closely related to age, however live performances and art exhibitions tend to be most popular among residents with higher incomes and more education.
- Programs and workshops most attract people aged 25 to 54 (56% *total likely*).

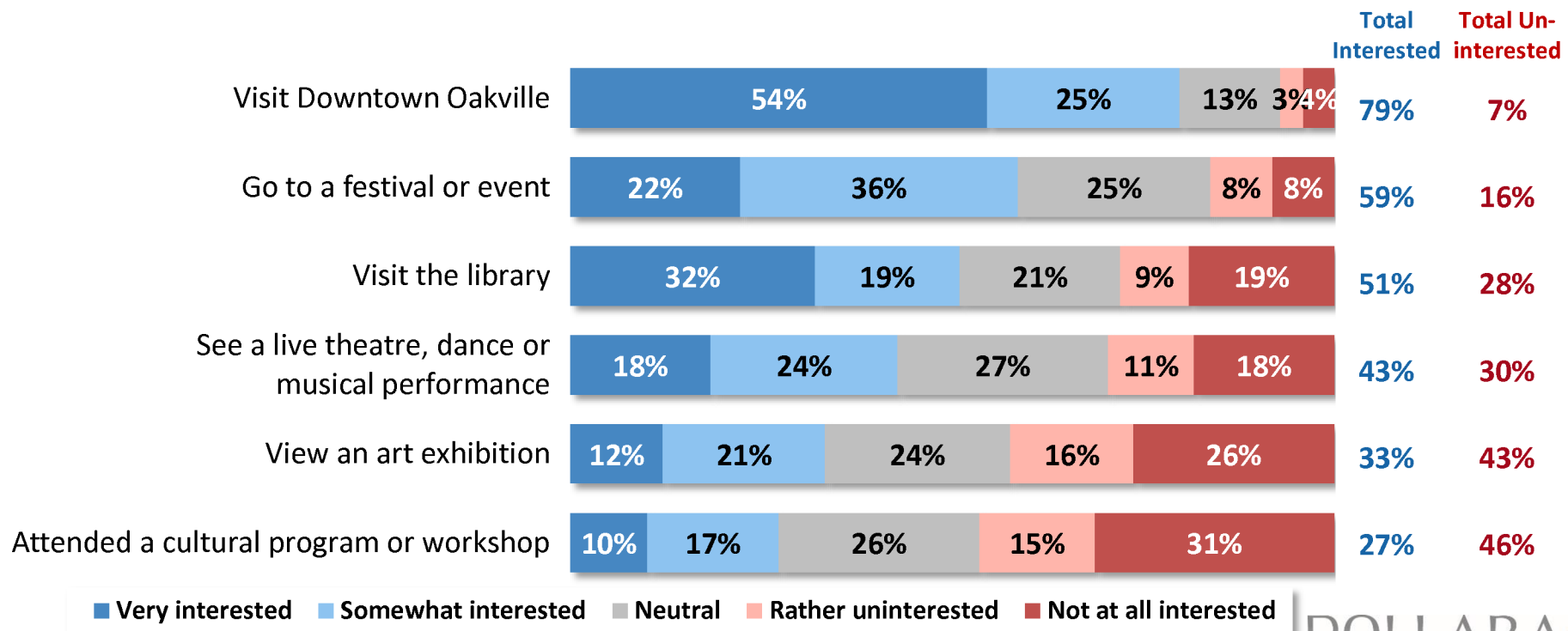


■ Absolutely certain
 ■ Very likely
 ■ Somewhat likely
 ■ Not that likely
 ■ Not at all likely

How likely are you to do the following in Oakville within the next 12 months? N=809

Considerable interest in more frequent cultural activity in Oakville

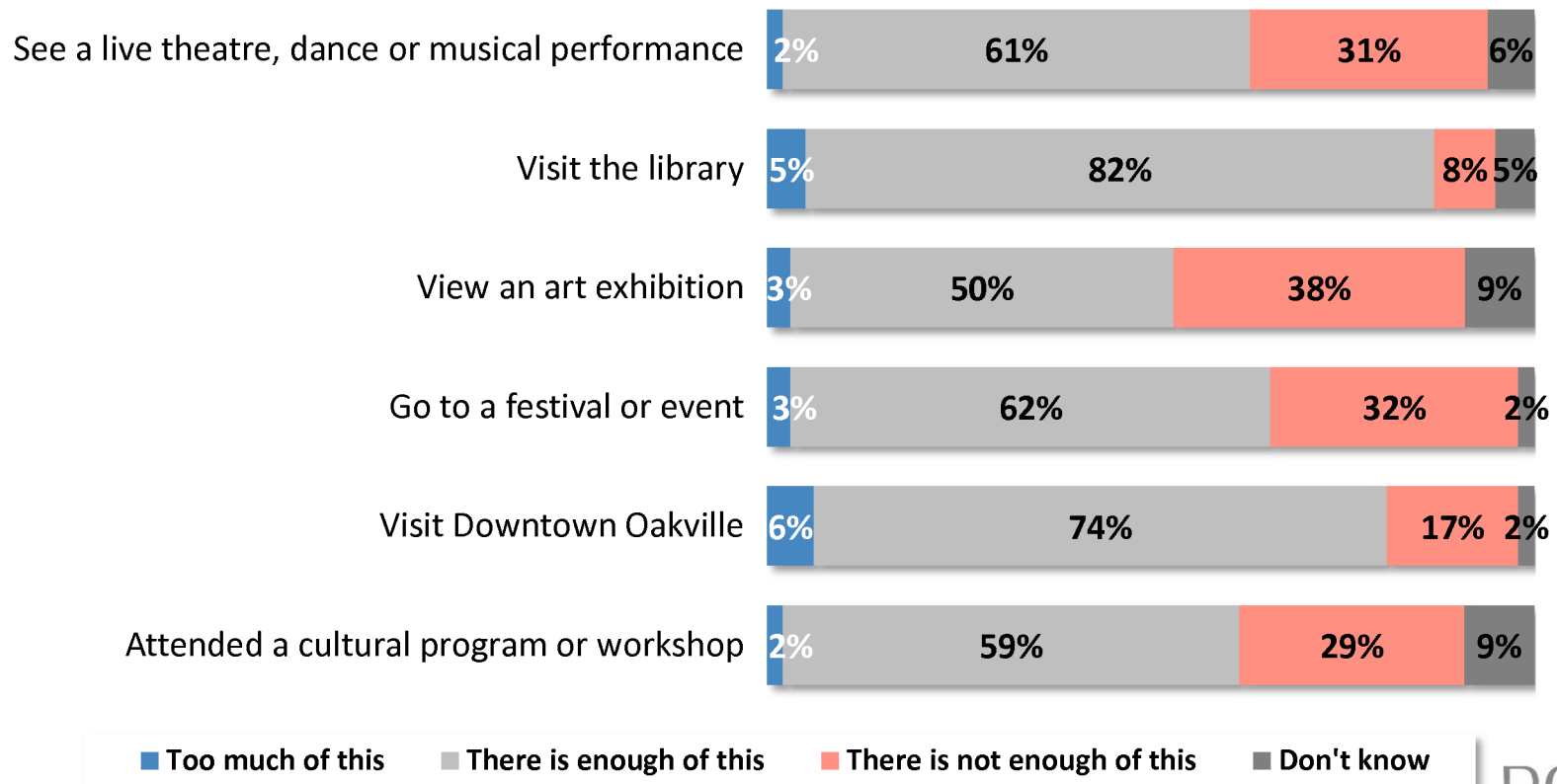
- Interest is strong across all wards and demographic groups. However, festivals are especially interesting to the young and live performances and art shows are most interesting to people with higher education.



Overall, how interested are you in doing the following in Oakville more frequently than you do currently? N=526

Does Oakville have enough cultural opportunities for residents?

- Most residents believe that there are enough cultural opportunities in Oakville, indicating that other barriers besides availability (such as time or cost) prevent them from attending more frequently.
- However, roughly one-third believe there are not enough festivals, events, live performances and art exhibitions. A similar number think the city needs more cultural programs and workshops.
- These views are similar across all demographic groups except that people under 35 (50%) are more likely than others (34%) to believe art exhibitions should be more available in Oakville.



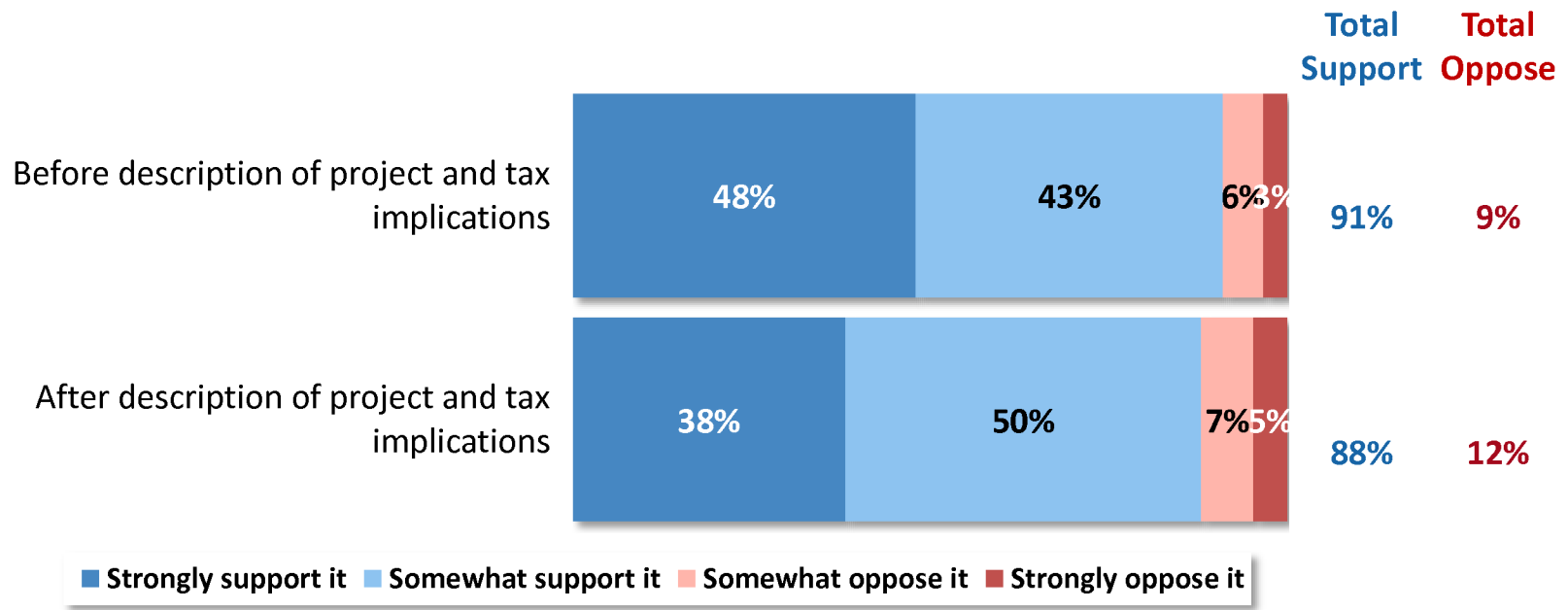
How would you rate the availability of being able to do the following in Oakville? N=529

Detailed Findings:
Testing Support for Cultural Investments

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Support for municipal investment

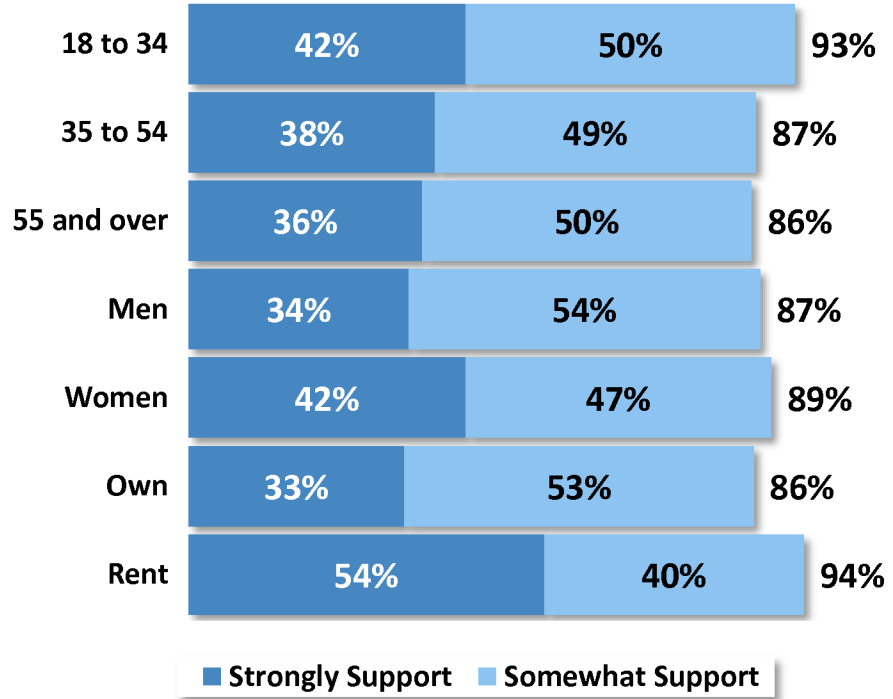
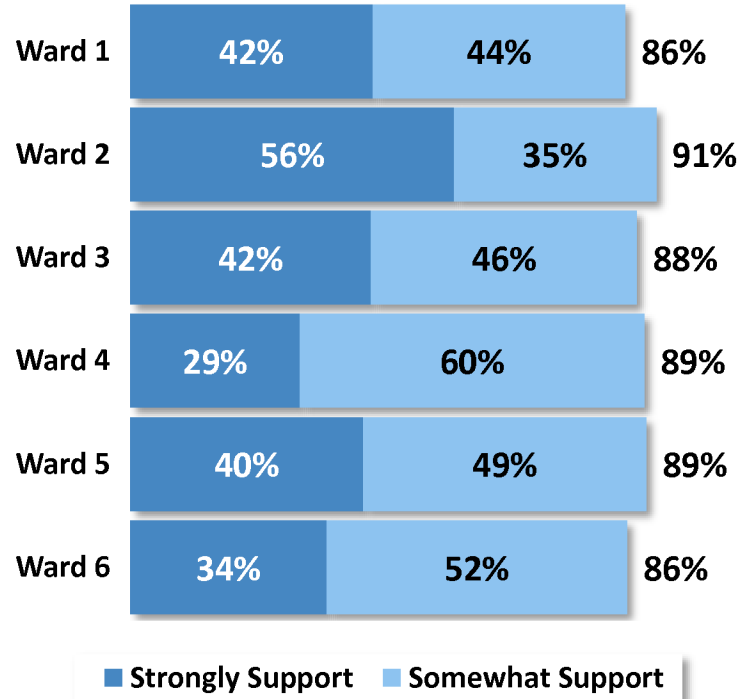
- At first blush, residents express widespread support (91%) for municipal investments in facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront. Notably, almost half provide strong support, whereas the remainder represent qualified support dependent upon more details.
- When support is measured again, following a description of the project that includes discussion of a possible property tax increase, overall support remains widespread (88%), but somewhat lower and less intense.



BEFORE: Overall, how much would you support or oppose the Town of Oakville making significant investments into improving ... facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront? AFTER: Now that we have spent some time talking about some of the things the Town is considering, how much would you support or oppose the Town of Oakville making significant investments into improving facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront? Would you say you...

Post-discussion support for municipal investment across wards and demographics

- Support for cultural investment is consistent across all six municipal wards in Oakville. Ward 4 is the least likely to be *strongly* supportive while Ward 2 is the most likely.
- Women are more likely than men to *strongly* support the investments. Support is also higher among renters than homeowners.

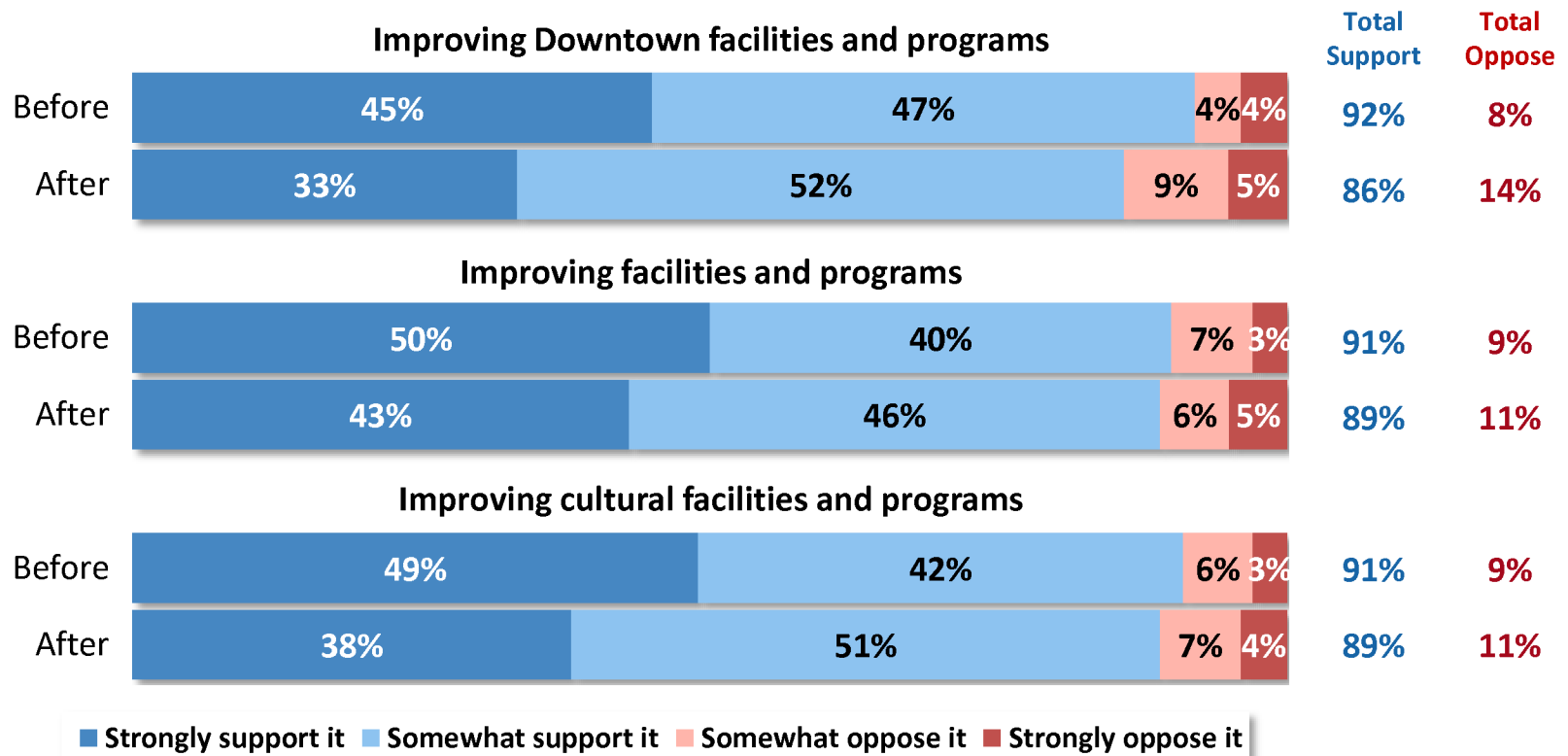


These figures report the results of the support question posed following the detailed project description. They also combine all three wording versions used.

Now that we have spent some time talking about some of the things the Town is considering, how much would you support or oppose the Town of Oakville making significant investments into improving facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront? Would you say you...

Response to terminology

- Different groups of survey respondents were asked the support questions using these three slightly different wordings.
- However, there is no statistically significant difference in support based upon the terms used.

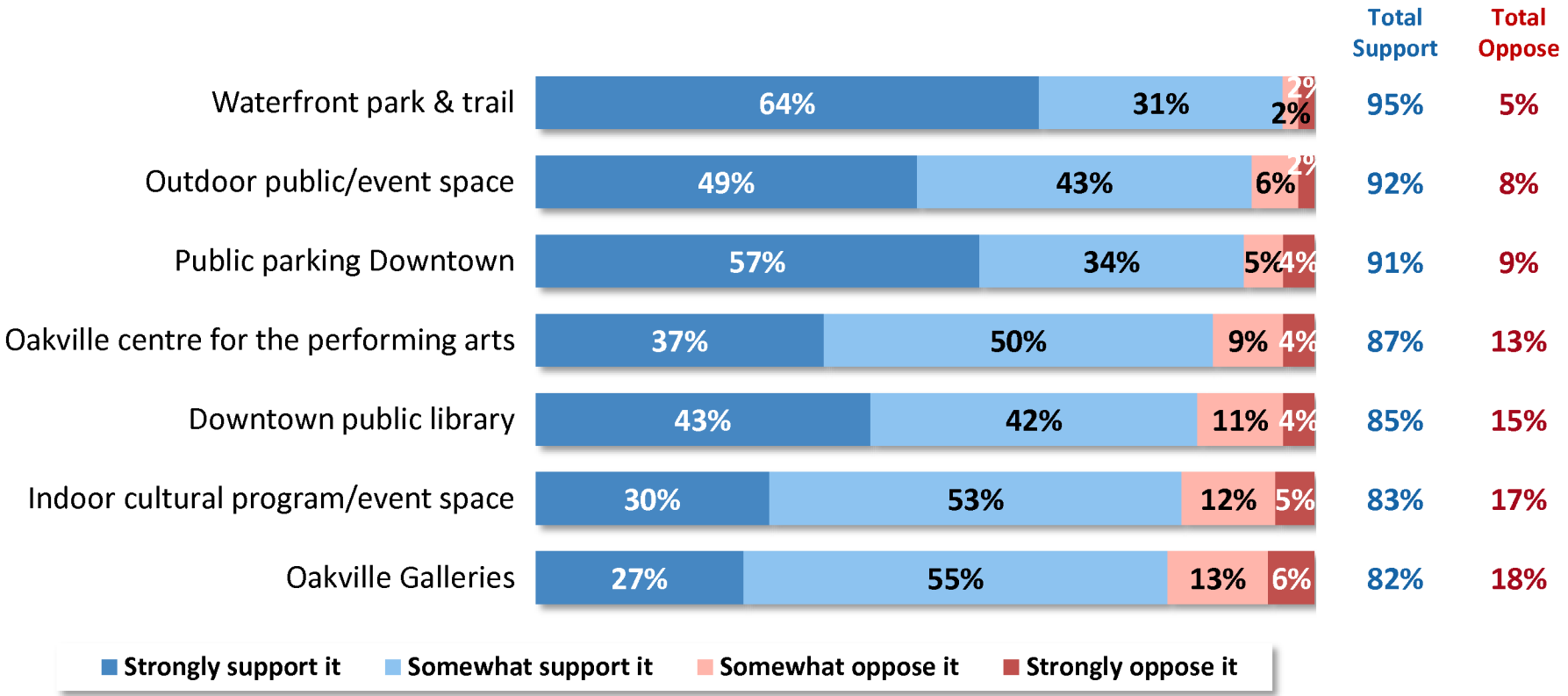


■ Strongly support it ■ Somewhat support it ■ Somewhat oppose it ■ Strongly oppose it

Overall, how much would you support or oppose the Town of Oakville making significant investments into improving ... facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront?

Resident support for municipal investments in culture

- Residents offer strong support for all seven types of investment tested in the study. The waterfront park and trail is the most popular investment, but support never drops below 80% for any option.
- Residents express stronger support for investments in outdoor facilities rather than indoor facilities.
- Support for each investment is remarkably strong and consistent across all wards and demographic groups tested. Despite lower overall support, Ward 4 residents are equally supportive of all these options. However, women tend to be 5% to 10% more supportive than men.



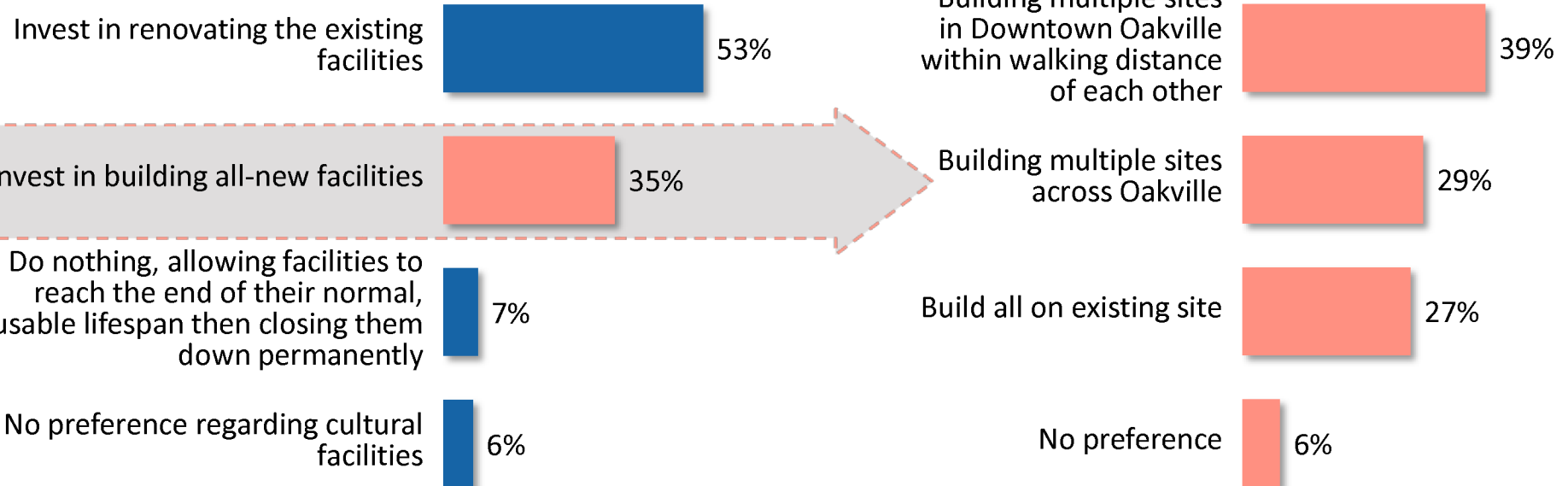
How much would you support or oppose the Town of Oakville making significant investments to maintain or improve the following? N=809

Solution to aging cultural facilities at Centennial Square

- A slight majority of residents (53%) would like to see aging cultural facilities in Oakville renovated rather than replaced. Most of the remainder (35%) would like new facilities to be built. *Investment preferences are not related to ward or demographics, although higher income residents are 8-10% more likely to call for new facilities*
- If new facilities are built, two-thirds prefer either multiple sites (39%) downtown or at Centennial Square (27%) downtown. Just 29% prefer multiple sites *across Oakville*.

Centennial Square is the area west of Navy Street, between Lakeshore and Rebecca in Downtown Oakville. Current facilities located at Centennial Square such as the Oakville Centre for the Performing Arts, which opened in 1977, are nearing the end of their normal, usable lifespan. As such, the Town of Oakville is currently considering a few different options for maintaining and improving cultural facilities and programs.

The Town of Oakville should...

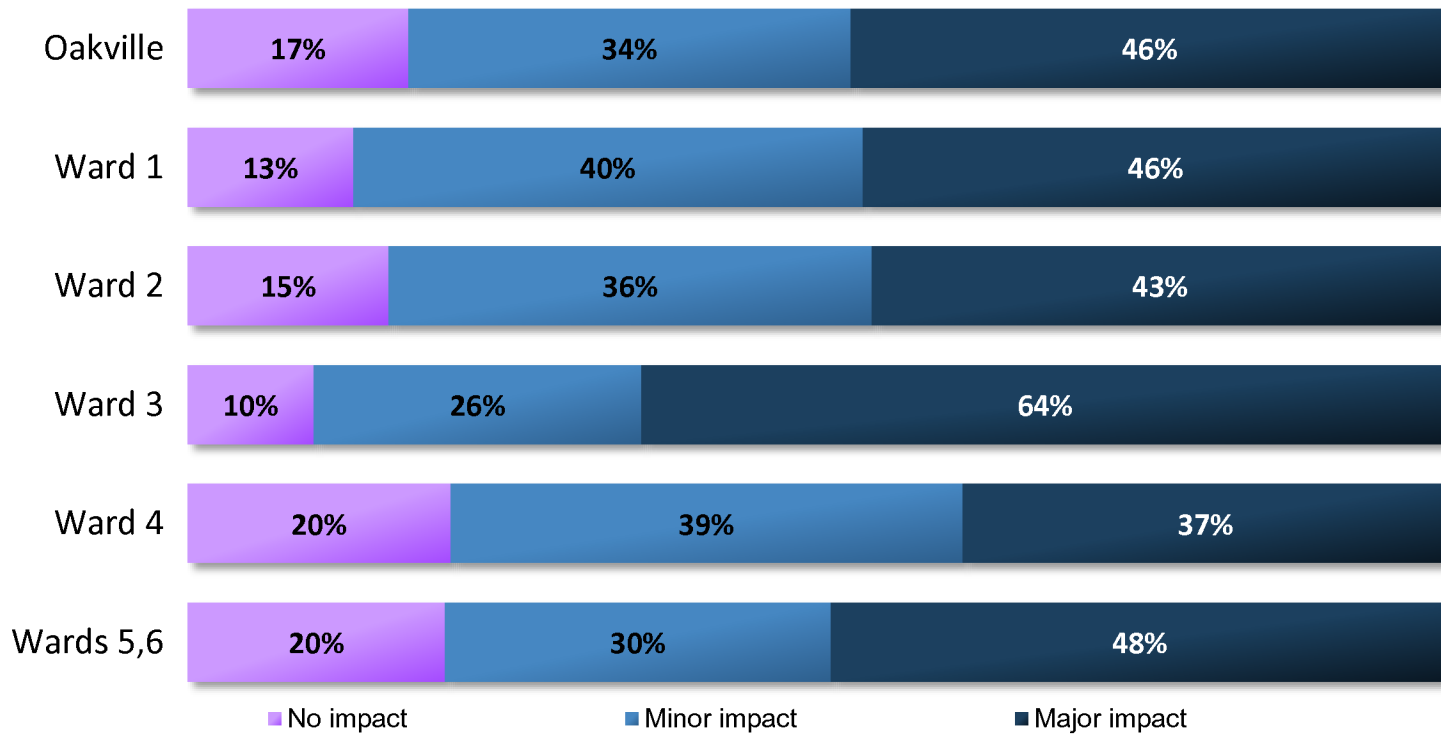


Which one of the following would be your preference for the approach the Town should take towards dealing with this issue? N=809
Thinking about the facilities, events and programs described in my previous question, which one of the following options would be your personal preference regarding location? N=283

Impact of Downtown on Overall Impression of Oakville:

Downtown affects most residents' opinion of the town as a whole

- Oakville's Downtown has an impact on the overall impression of the town for four-fifths (80%) of residents. This impact is felt throughout the town, ranging from a high of 90% in Ward 3 itself to a low of 76% in Ward 4. In fact, roughly half of residents (46%) say the Downtown has a *major* impact on their impression of Oakville.



Additional property tax to pay for cultural investments

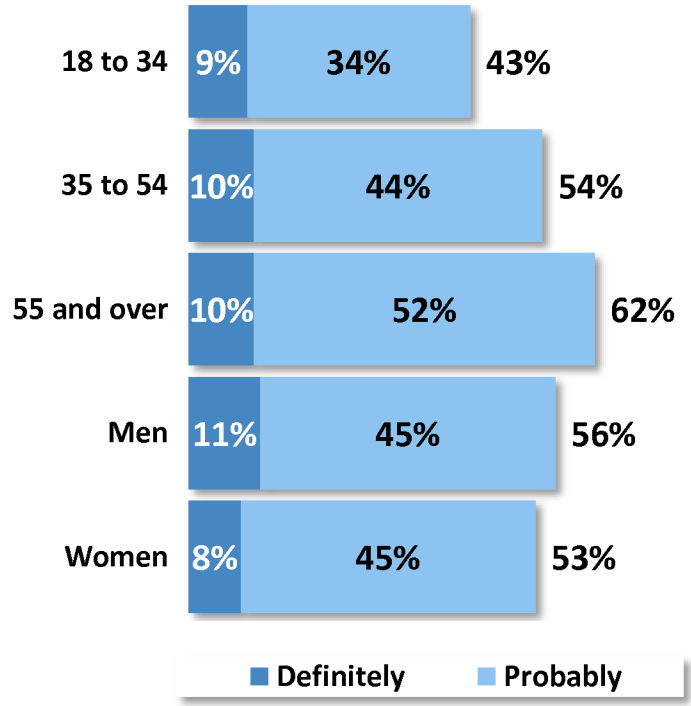
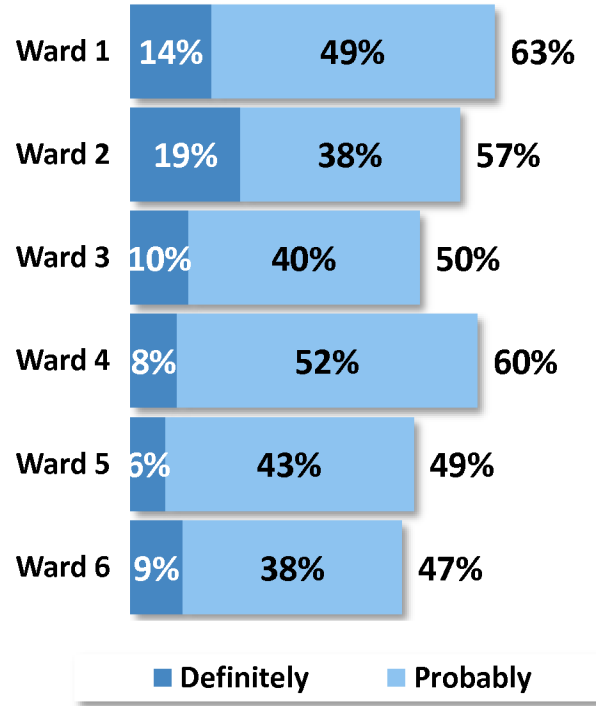
- Residents are split regarding their willingness to pay increased property tax to fund cultural investments, **but opposition is twice as intense as support.**



A key consideration for determining what the Town of Oakville will be able to do in terms of dealing with its cultural facilities is, of course, cost. All three options – renovation, construction or demolition – will require the Town to raise additional revenue to fund the project. Considering this, would be willing to help fund the project through a modest increase in your property taxes?

Willingness to pay more tax for cultural investments: Wards and demographics

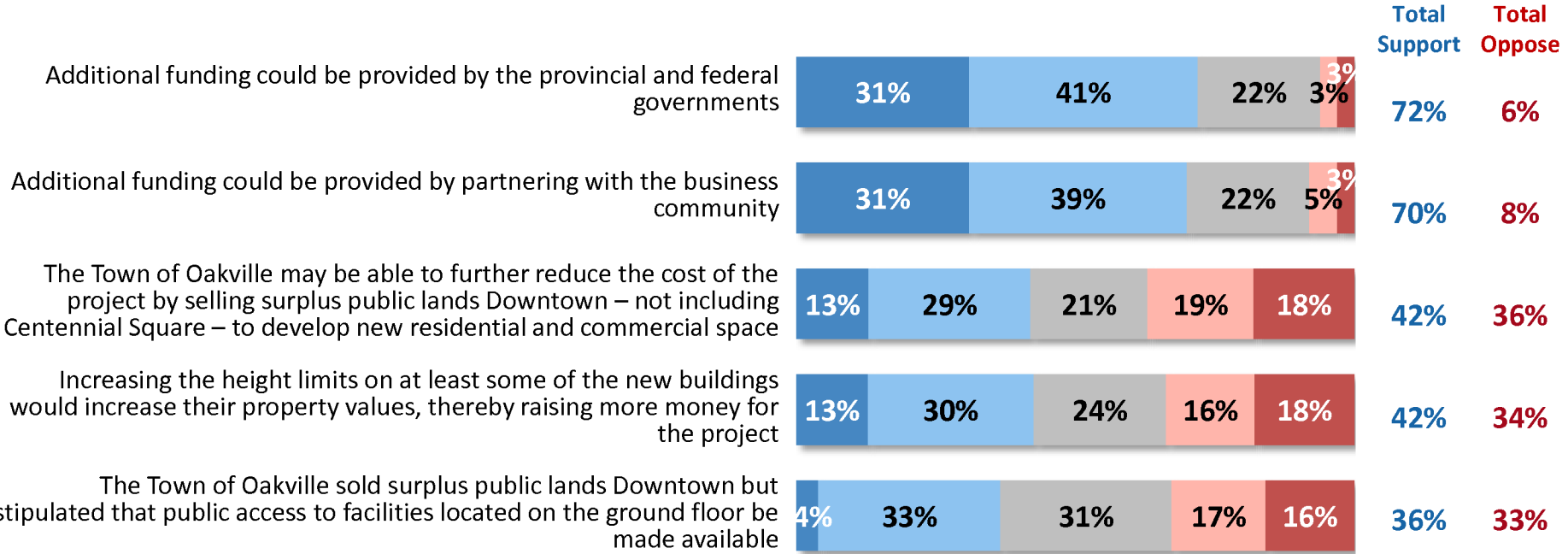
- Willingness to pay additional tax varies between the wards from 47% in Ward 6 to 63% in Ward 1. In all wards, most responses are *probably* rather than *definite*.
- Willingness to pay additional tax increases with age. Men and women offer similar responses.



A key consideration for determining what the Town of Oakville will be able to do in terms of dealing with its cultural facilities is, of course, cost. All three options – renovation, construction or demolition – will require the Town to raise additional revenue to fund the project. Considering this, would you be willing to help fund the project through a modest increase in your property taxes?

Factors which increase support for improving cultural facilities and programs

- Additional funding from the provincial and federal governments would make residents more supportive of investments in cultural facilities as would financial contributions from the business community.
- In comparison, the sale of city land downtown is less likely to increase support for cultural investments, whether or not the ground floors of new buildings remain public areas. Revenue from increasing building heights also has only a mildly positive impact on support.

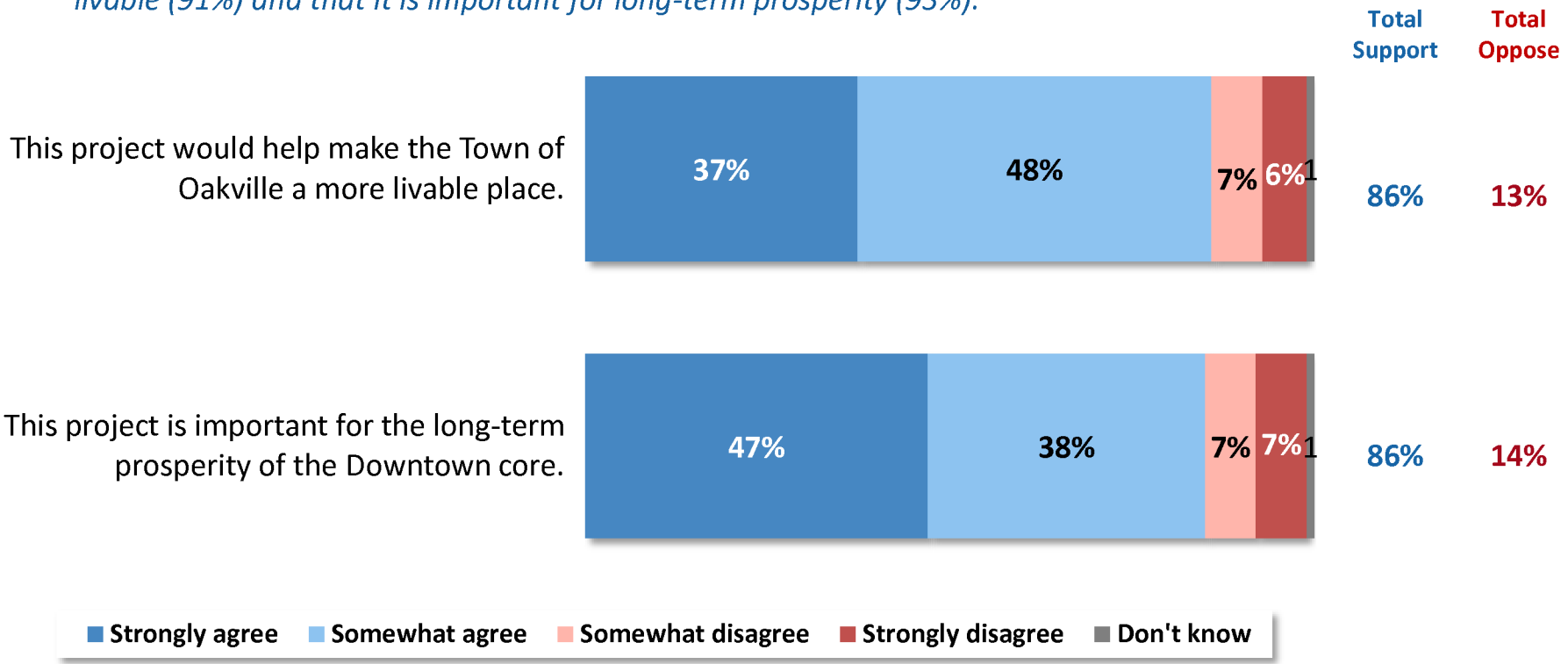


■ Much more likely to support ■ Somewhat more likely to support ■ No impact ■ Somewhat more likely to oppose ■ Much more likely to oppose

These figures report the results of all three wording versions used.
 Please tell me if hearing this information makes you more or less likely to support each of the following?

Perceived impacts and importance of cultural investments

- Although there is limited support for tax increases, at the conclusion of the survey, large majorities of residents agreed that investment in cultural facilities in the city will make Oakville more livable and is important for the long-term prosperity of the downtown core. Disagreement is limited to fewer than one resident in seven. *Strong agreement exists for both these statements in all wards and demographic groups. Residents under 35 are especially likely to agree that the project would make Oakville more livable (91%) and that it is important for long-term prosperity (93%).*



Additional Consultation: Open Website Survey

- Following the conclusion of this survey, a **somewhat simplified version** of it was made available to the public from **April 20 – May 16, 2016** via our **online** platform. The survey was publicized by the Town via their website and other means. **N=788 respondents completed it.**
 - This was **not a statistically-reliable, representative survey.**
It was an open, self-select survey, much like a townhall or open house event.
- **Similar support levels on “Significant Investment”** questions, but much more intense
- Among the **More/Less Likely to Support testing questions, support is similar** but more intense (and No Impact is somewhat higher), except for options testing business community assistance, selling of public lands, and allowing taller building heights – which have lower and less intense support levels.
- On the Preference questions, the **preference for the type of investment is inverted**, with a **majority preferring all-new facilities** and about a third preferring renovation. Among those preferring all-new, a clear majority (61%) prefer Multiple Sites Downtown – compared to 39% in the statistically-reliable, representative survey.



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