



## REPORT

### PLANNING AND DEVELOPMENT COUNCIL MEETING

MEETING DATE: NOVEMBER 1, 2016

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**FROM:** Commissioner of Community Development

**DATE:** October 19, 2016

**SUBJECT:** Downtown Cultural Hub Update

**LOCATION:** Downtown

**WARD:** Town wide

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#### RECOMMENDATION:

1. That the Downtown Oakville Cultural Hub Update report from the Commissioner of Community Development, dated October 19, 2016, be received; and
2. That \$900,000.00 of the original funding in the Downtown Cultural Hub Phase 3 capital project (project # 21101602) for the downtown market research be returned to the general working capital reserve and the balance of \$100,000 be retained in the project to support the Phase 1 work plan related to property research and public engagement.

#### KEY FACTS:

The following are key points for consideration with respect to this report:

- Downtown Plan project was officially launched in December 2013 to address: downtown Oakville needed revitalization, Lakeshore Road needed replacement, downtown cultural facilities (Oakville Centre, library, galleries) were nearing their end of life and potential for funding from federal and provincial governments related to Canada's 150<sup>th</sup> celebration.
- This resulted in extensive public consultation being undertaken on two key projects: Downtown Transportation and Streetscape (DTS) and the Downtown Cultural Hub (DCH)
- DTS approved in March 2015 and implementation now underway.
- DCH reports to Council in June, October and November 2015. Council requested staff to provide more information on the following:
  - Town-wide public opinion on the cultural hub
  - Feedback on issues from the Downtown Oakville Growth Area official plan review (OP Review)

- Feedback on a program to get private sector input, including market sounding
- Two additional changes in environment have also significantly impacted scope of project since November 2015:
  - To date, infrastructure funding programs have not provided the opportunity for the desired scale of federal-provincial contributions
  - Council passed a motion in March 2016 that the town would not sell Centennial Square lands or air rights which reduced the land value that the town could bring to the table to help finance project
- This report outlines the proposed new approach to move forward with the DCH to meet public expectations within the financial resources available for the project.

#### **BACKGROUND:**

The Downtown Plan project was officially launched in 2013 to address three critical needs that were facing downtown Oakville. The town had identified that downtown Oakville needed revitalization, Lakeshore Road was at the end of its life and needed replacement, downtown cultural facilities such as the Oakville Centre for the Performing Arts, the Oakville library, and the Oakville Galleries were approaching their end of life. The opportunity to take advantage of funding through the federal/provincial governments relative to Canada's 150<sup>th</sup> was also key in the timing of the project startup.

In June 2014, Council endorsed the following vision and objectives for the Downtown Plan:

#### **Vision**

- To create an attractive, active, animated and vibrant downtown where people come together to live, meet, work, stay, interact and engage.
- It will be the cultural, social and economic heart of our community where citizens and visitors can celebrate and experience the natural setting, heritage, culture and the arts.

#### **Objectives**

- To contribute to an economically successful vibrant downtown
- To create a cultural focus for the town in the downtown area
- To provide facilities and infrastructure that meet existing and future needs
- To protect and enhance the natural environmental and cultural heritage of downtown
- To develop solutions that are financially sustainable

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Over the past three years, town staff has held a series of public workshops, surveys and focus groups to move forward on the two key projects under the Downtown Plan:

- Downtown Transportation and Streetscape (DTS)
- Downtown Cultural Hub (DCH)

The DTS was approved in March 2015 and implementation is underway. Most recently Council approved traditional furnishings for the DTS and work on Lakeshore Bridge is moving forward in 2017. In addition, staff will be reporting back to Council on potential mitigation strategies for downtown businesses during the reconstruction of Lakeshore Road.

Staff presented reports on the DCH to Council in June, October and November 2015. In November 2015, Council requested staff to provide more information related to three issues:

1. Town-wide public opinion on the cultural hub
2. Feedback on issues to be addressed from the Downtown Oakville Growth Area official plan review (OP review)
3. Feedback on program to get private sector input, including market sounding

Two additional considerations emerged since November 2015 that have also been considered in this report.

1. In response to public feedback, Council passed a motion in March 2016 that established that the town would not sell Centennial Square lands or air rights to help fund the DCH. This reduces the value of the land that the town can bring to the project to help fund the project.
2. The town had hoped that federal and provincial infrastructure funding programs would provide a significant opportunity to jump start the funding for the DCH. Current infrastructure program parameters do not support the high level of financing required.

As a result, staff has reassessed the original options and implementation plan for the DCH to develop a more scalable and incremental project plan that can be considered within Council's current fiscal parameters. Staff has undertaken this review by looking beyond the three options brought forward to Council in 2015.

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## COMMENT/OPTIONS:

This report outlines the work done to date to address Council's request for more information from November 2015, as well as outlining a potential way forward for the DCH project. Staff's focus remains on ensuring the DCH project reflects the needs and expectations of the community, while respecting the financial resources available to the town.

### 1. Public Opinion Survey (Pollara Strategic Insights)

The town engaged Pollara Strategic Insights to undertake a public opinion survey to provide Council with a town-wide snapshot of public opinion on the DCH. This telephone survey of 609 residents from across the town was undertaken in early April 2016. In addition, Pollara also engaged a citizen online panel of 200 residents from across the town to provide survey feedback. The statistical reliability of this feedback is plus/minus 3.5 per cent, 19 times out of 20.

Key highlights from this research include:

- 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 riverfront.
- The riverfront 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
- 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.
- 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.
- 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.



- 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.
- 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.

The town also made the survey available through the town's website for the public to self-select to participate and 788 surveys were completed. Typically online surveys attract participants who are more highly engaged in a topic and this usually results in more intense level of support or opposition.

Key findings include:

- 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.

## **2. Downtown Growth Area Official Plan Review (OP Review)**

Work on the OP review is in its early stages and is expected to continue in the first quarter of 2017. Workshops will be held with residents' associations in early 2017 to better understand the relationship between the OP review and the DCH project. Preliminary feedback from the first two public meetings held in November 2015 indicated there was support for increased height in the downtown in specific and appropriate locations. However, participation to date has been limited and there is more work needed to ensure public understanding and acceptance of change to the downtown. Public engagement strategies will be key in early 2017 to ensure we have a clearer understanding of the community's desires.

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### 3. Private Sector Input

Preliminary input suggests that remaining town lands do not generate sufficient revenue to address public concerns over costs or provide the scale required for major private sector investment. Staff will be continuing work to determine opportunities to maximize opportunities for specific town's properties. However, further market sounding or research is not required at this time.

### 4. Moving Forward

So what do the survey results, the need for further study of changes to the OP review and the changing fiscal environment mean for the DCH? Town staff is recommending that the DCH be reinvented as a scalable, incremental project that will reflect public needs and expectations and address concerns over costs.

This will require staff to complete additional work to understand how to best move forward with the development of a revised long-term plan. However, based on the results of the public opinion survey it is recommended that this plan should include the delivery of a riverfront park as its first priority for moving forward as it already has significant public support.

Based on what is known today, the following is a potential timeline for the development of this incremental plan for the DCH. More specific timelines will be introduced as work progresses. Council approval will be required to move forward on any specific project.

#### Phase 1 (2017-2020)

- a. Complete OP review process to fully understand height limits and options
- b. Undertake theatre feasibility study with design concepts which will help to inform Council on practical, cost efficient options for the theatre with an optimum schedule going forward
- c. Identify new plan for the downtown library based on needs identified through the Library strategic plan
- d. Identify relationship between Harbours Master Plan and potential new riverfront park
- e. Determine how to achieve a riverfront park and outdoor event space as early as possible
- f. Identify potential opportunities for the redevelopment of the fire hall, post office, lot 2 site to generate revenue to support DCH projects
- g. Identify opportunities for the incremental implementation of the art gallery, parking spaces, digital hub space in the downtown

- h. Tear down old fire hall and begin process to define redevelopment of the site

**Phase 2 (2020-2024)**

- i. Create downtown riverfront park (parkland and event space) on broader Centennial Square site - explore opportunities for funding through Parkland Reserve
- j. Identify potential theatre renovations to meet short-term needs, and potential theatre redevelopment plan to meet longer-term needs
- k. Implement the new downtown library plan
- l. Realize potential revenue from redevelopment to fund DCH projects

In November 2015, Council had approved the funding of the market sounding process, however these funds were to be held until Council had approved the market sounding approach to be outlined in staff's further report. Given the new approach, staff are recommending that \$900,000 of the capital funding be returned to the reserves and that a remaining \$100,000 be retained in the Downtown Plan account to fund the property evaluations and public engagement as part of Phase 1.

**CONSIDERATIONS:****(A) PUBLIC**

The Downtown Plan is of significant interest to residents across the town and staff has undertaken a broad range of consultation to engage residents and get feedback on the DTS and DCH projects. Notification of this meeting has gone out to interested stakeholders through the town's e-newsletter, social media, notice to residents' associations and the Oakville Beaver.

**(B) FINANCIAL**

Staff are recommending that \$900,000 of the previous funding in the Downtown Cultural Hub Phase 3 project (#21101602) for the market sounding be returned to the general working capital reserve and the remaining \$100,000 be retained in the Downtown Plan project in order to fund the property evaluations and public engagement outlined as part of Phase 1.

**(C) IMPACT ON OTHER DEPARTMENTS & USERS**

The Downtown Plan is a significant project that overlaps responsibilities for multiple departments. A cross-departmental steering committee has been established including staff from Finance, Planning, Recreation and Culture, Engineering and Construction and Strategy, Policy and Communications

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**(D) CORPORATE AND/OR DEPARTMENT STRATEGIC GOALS**

This report addresses the corporate strategic goal to:

- enhance our economic environment
- be innovative in everything we do
- enhance our cultural environment
- enhance our social environment
- be the most livable town in Canada

**(E) COMMUNITY SUSTAINABILITY**

The Downtown Plan initiative impacts all four pillars of sustainability and are specifically addressed in the vision and five objectives which define the two studies – Downtown Cultural Hub Study and Downtown Transportation and Streetscape Study.

**APPENDICES:**

Appendix A – Pollara Survey Results

Prepared and Recommended by:

Jane Clohecy

Commissioner, Community Development



## **Downtown Cultural Hub Study**

**Presentation to Planning and Development Council**

**November 1, 2016**



## 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  $\pm 3.5\%$** , 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*

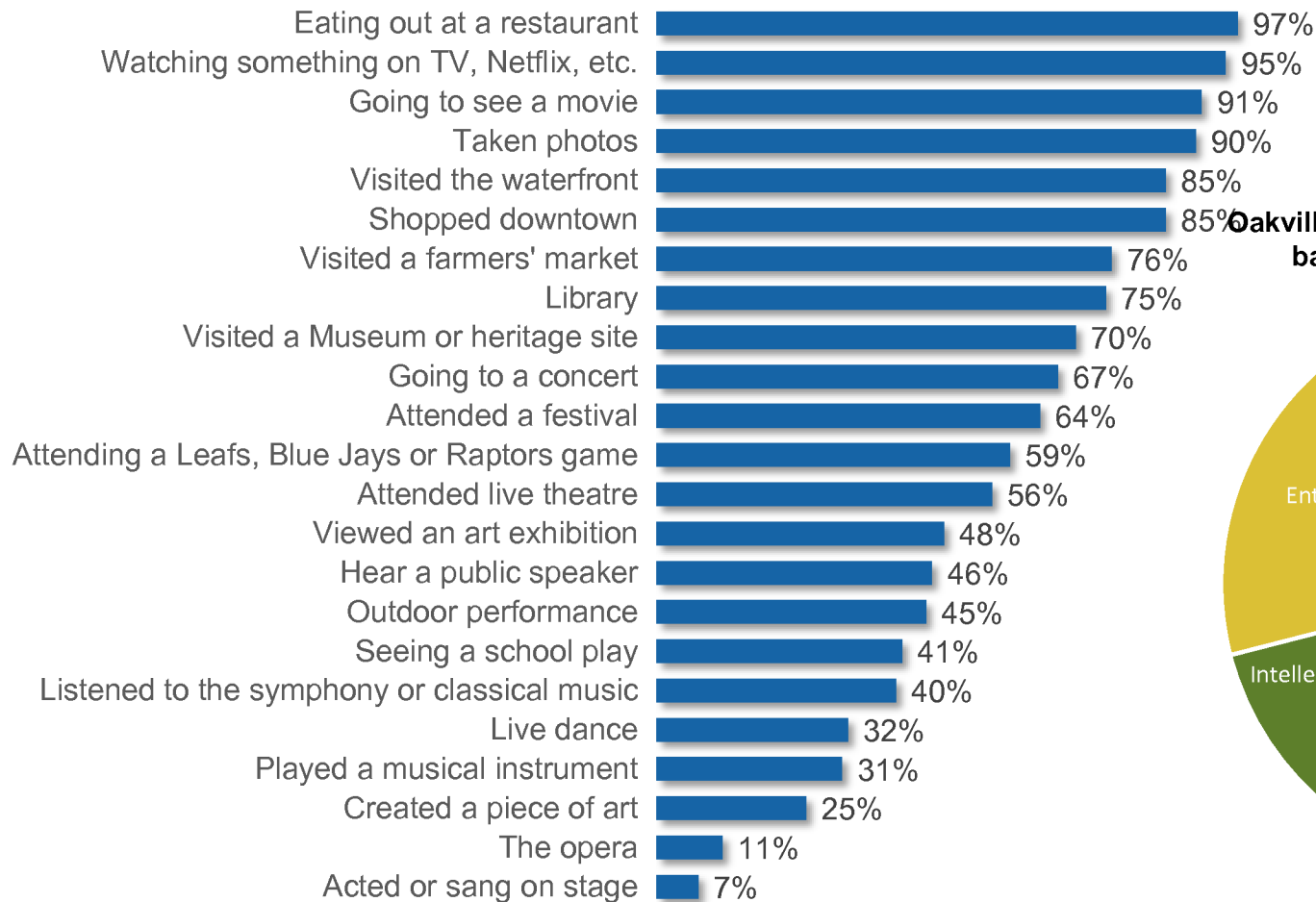
- Residents are split regarding their willingness to pay increased property tax to fund cultural investments. A small majority (55%) support the idea, but only 10% would *definitely* be willing to pay additional property tax. In contrast, 45% oppose the idea including 23% who *definitely would not* be 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**

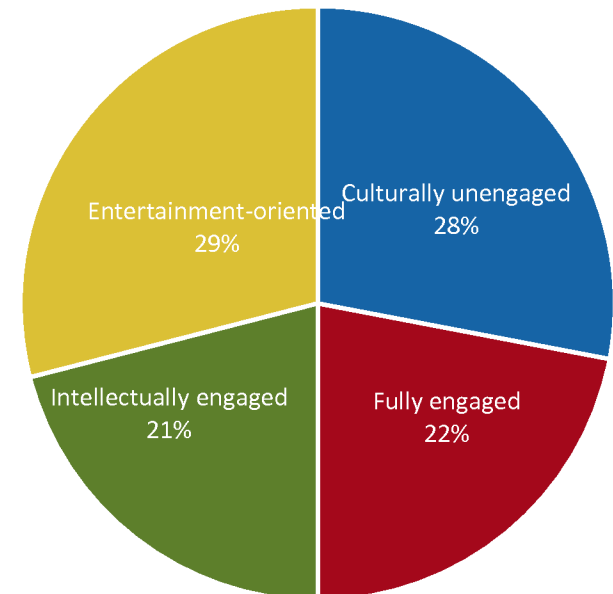
POLLARA 

# 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

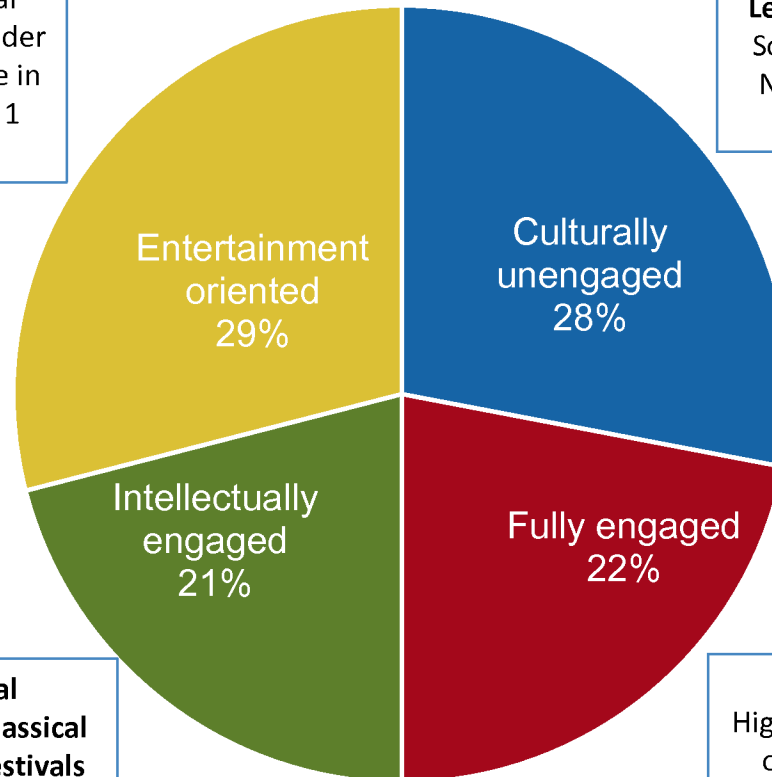


Q. I am now going to read you a list of activities. Please tell me which ones, if any, you have done in the **past five years**? N=807

# 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%)



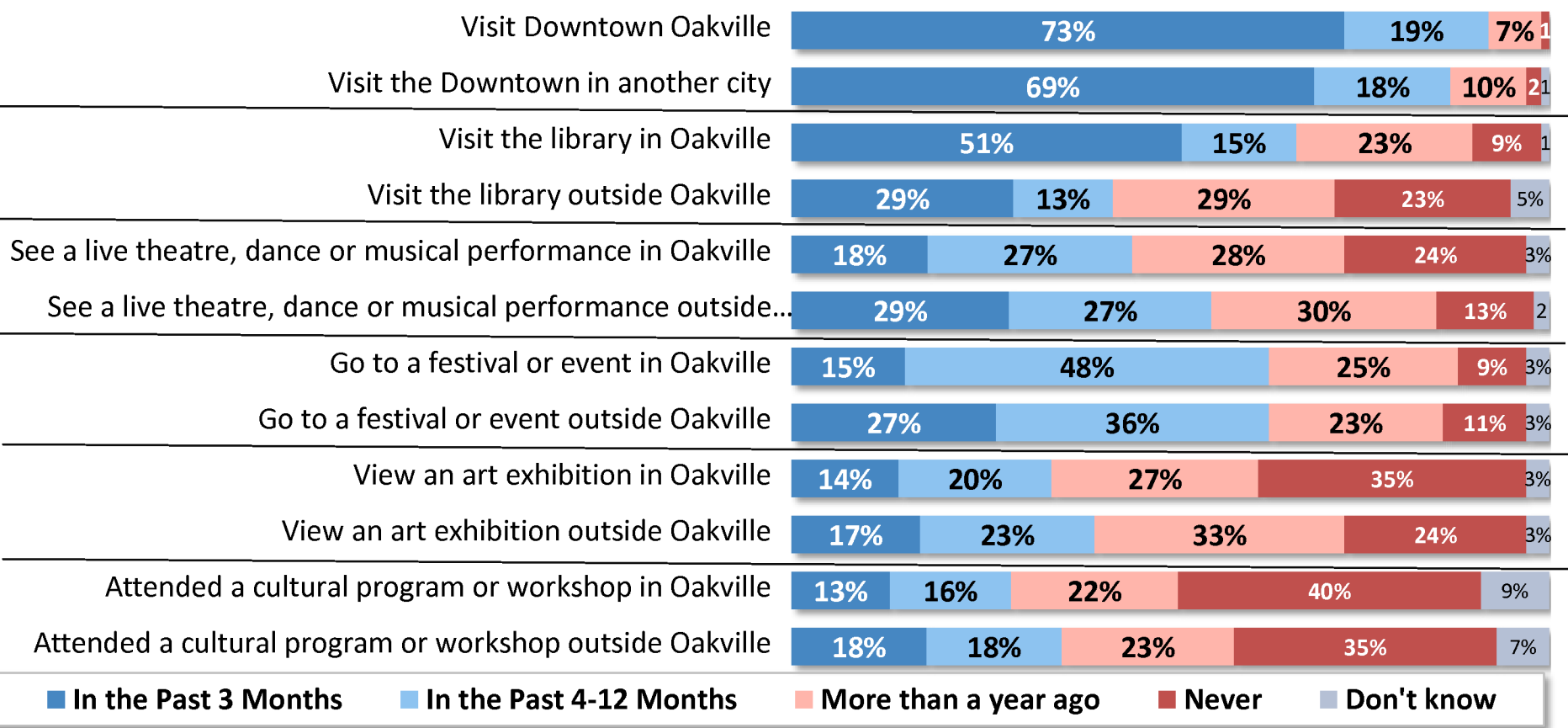
Widely engaged with **cultural experiences such as art shows, classical music, outdoor performances, festivals and the library** Less interested in **sports and concerts**. Equal income and age distribution. Third live in Ward 5 (32%). Less common in Wards 2 (6%) and 4 (6%).

**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.

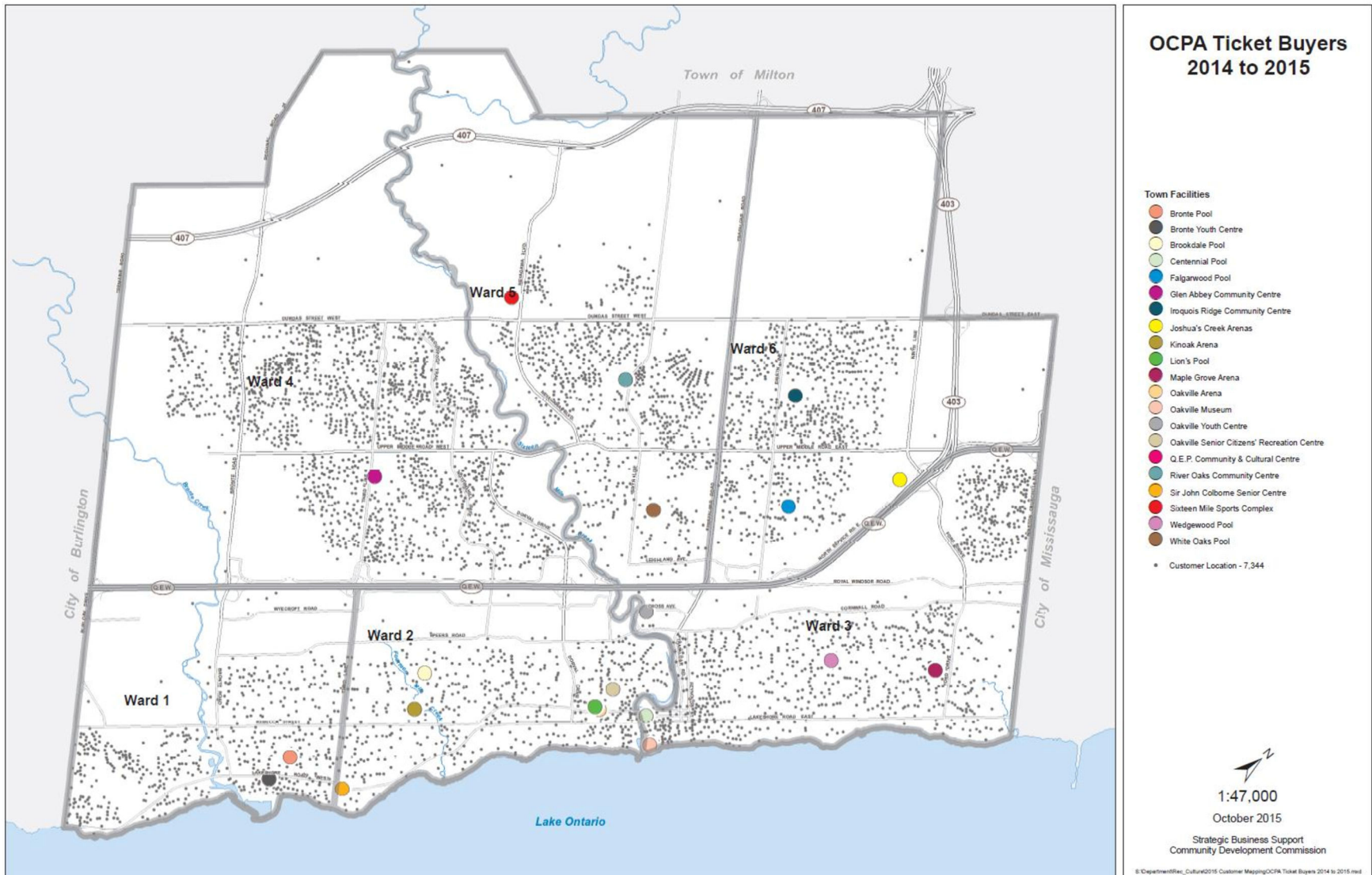


When was the last time you or a member of your household did the following? N=528



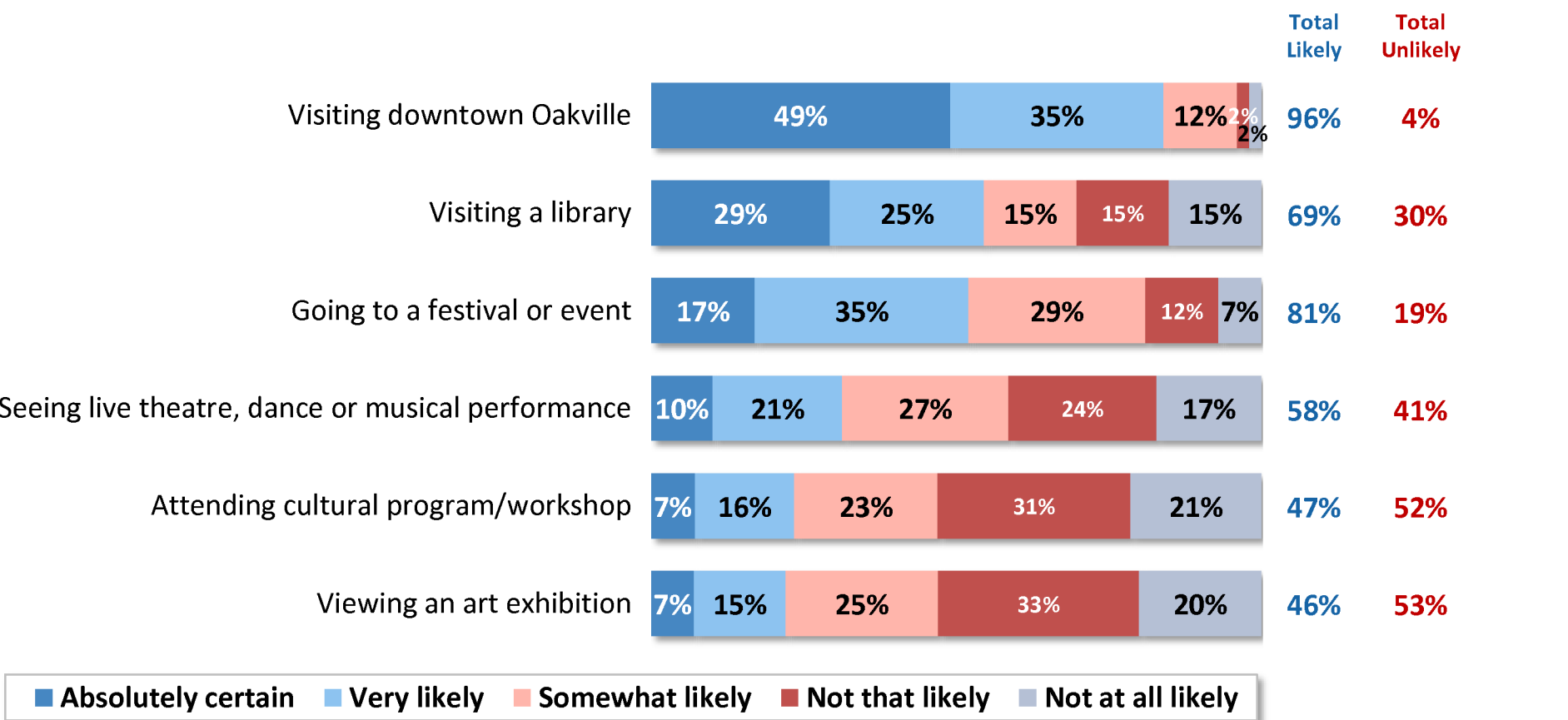
# Performing Arts Ticket Buyers Distribution Map:

*Ticket buyers distributed widely throughout Oakville; No evident clustering*



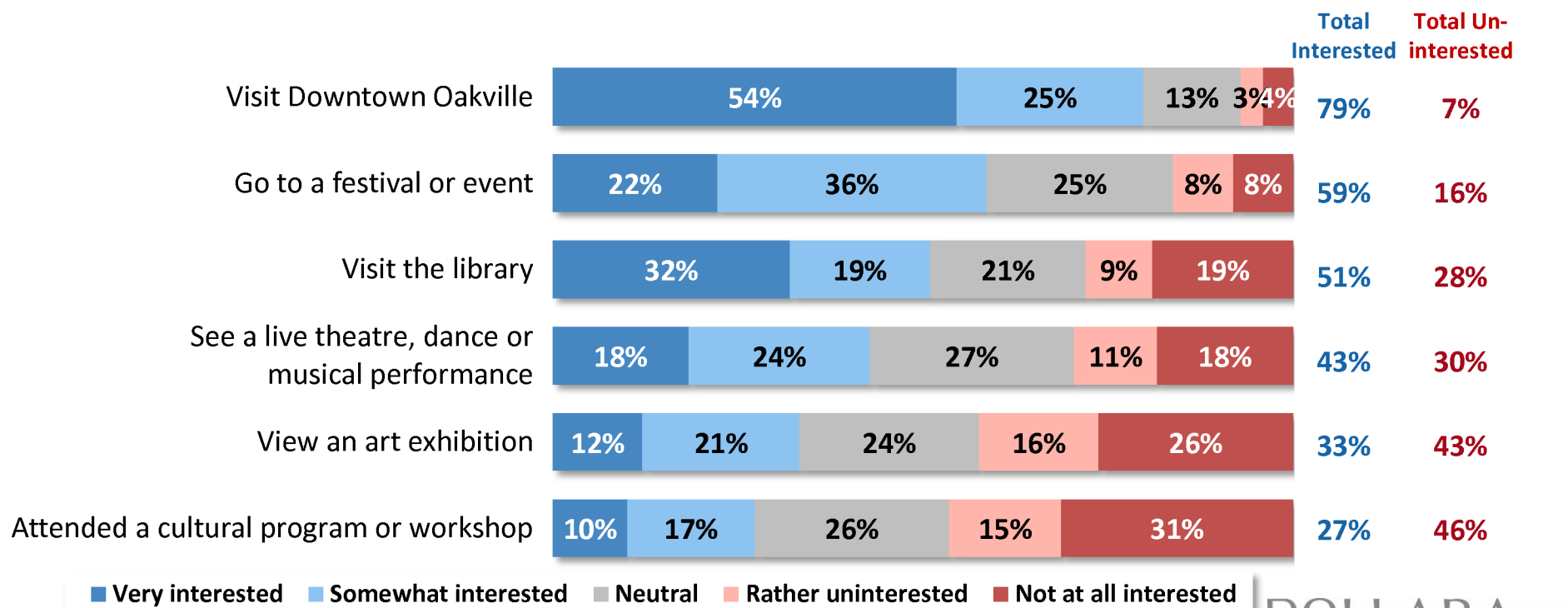
# Likelihood of attending various cultural events in Oakville (next 12 months)

- 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*).



# 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.

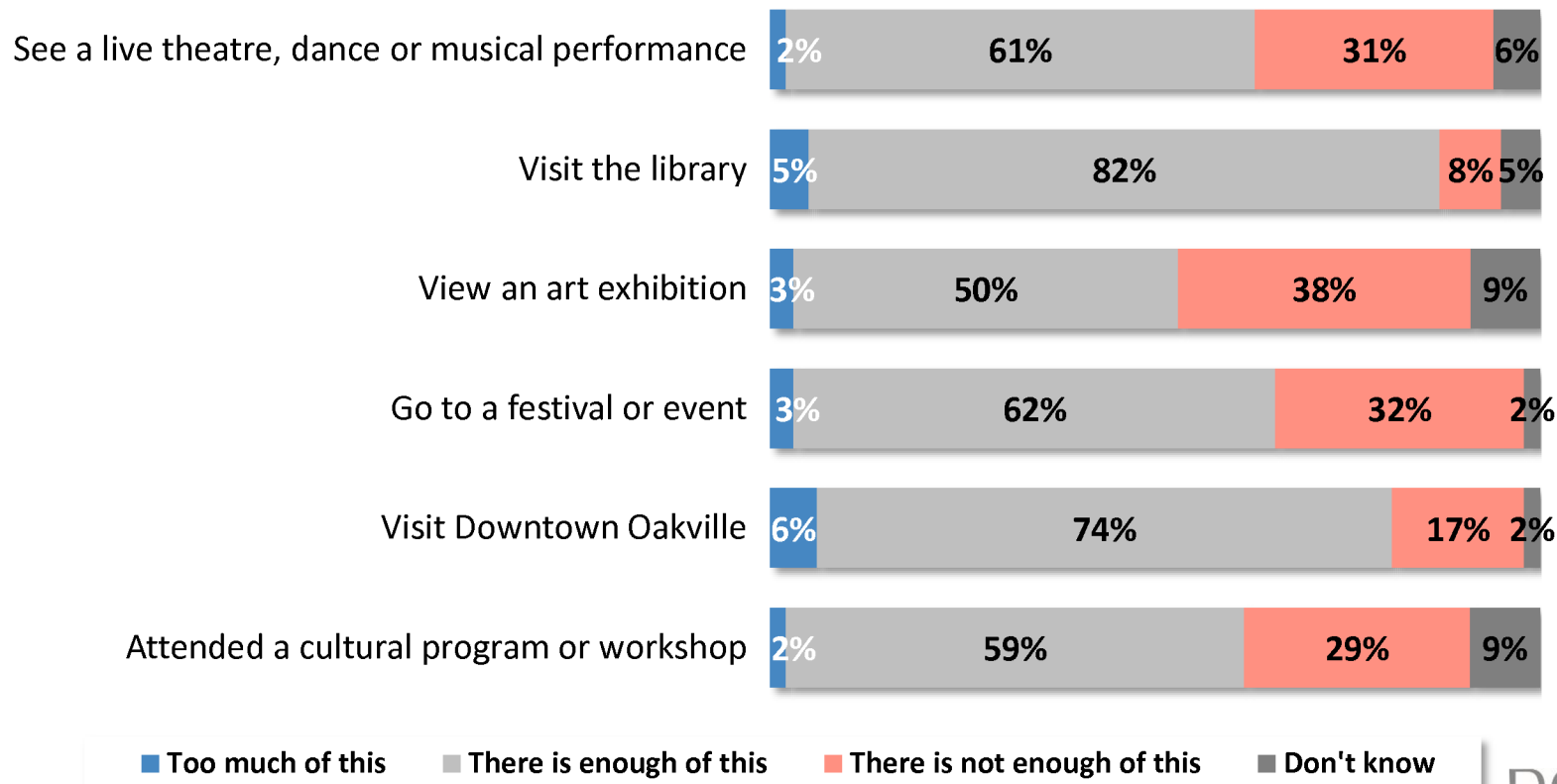


Overall, how interested are you in doing the following in Oakville more frequently than you do currently? N=526



# 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.



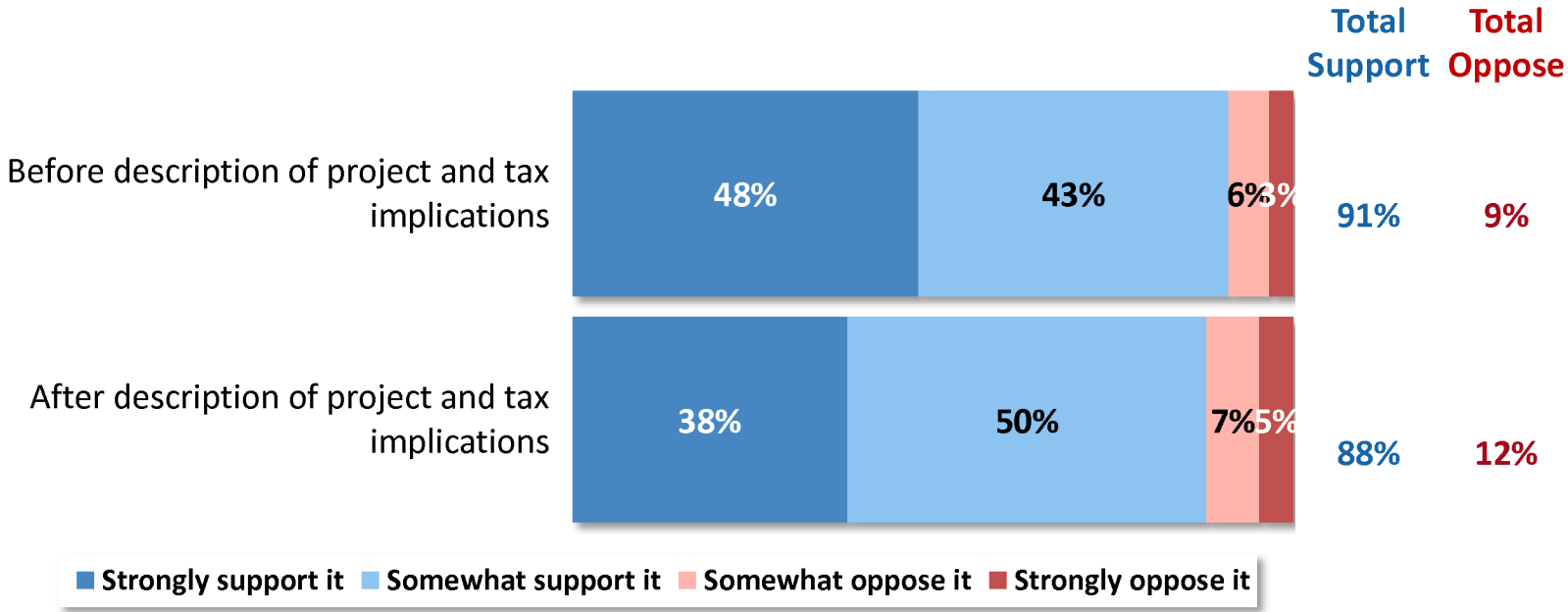
How would you rate the availability of being able to do the following in Oakville? N=529

**Detailed Findings:**  
**Testing Support for Cultural Investments**

POLLARA 

# Support for municipal investment

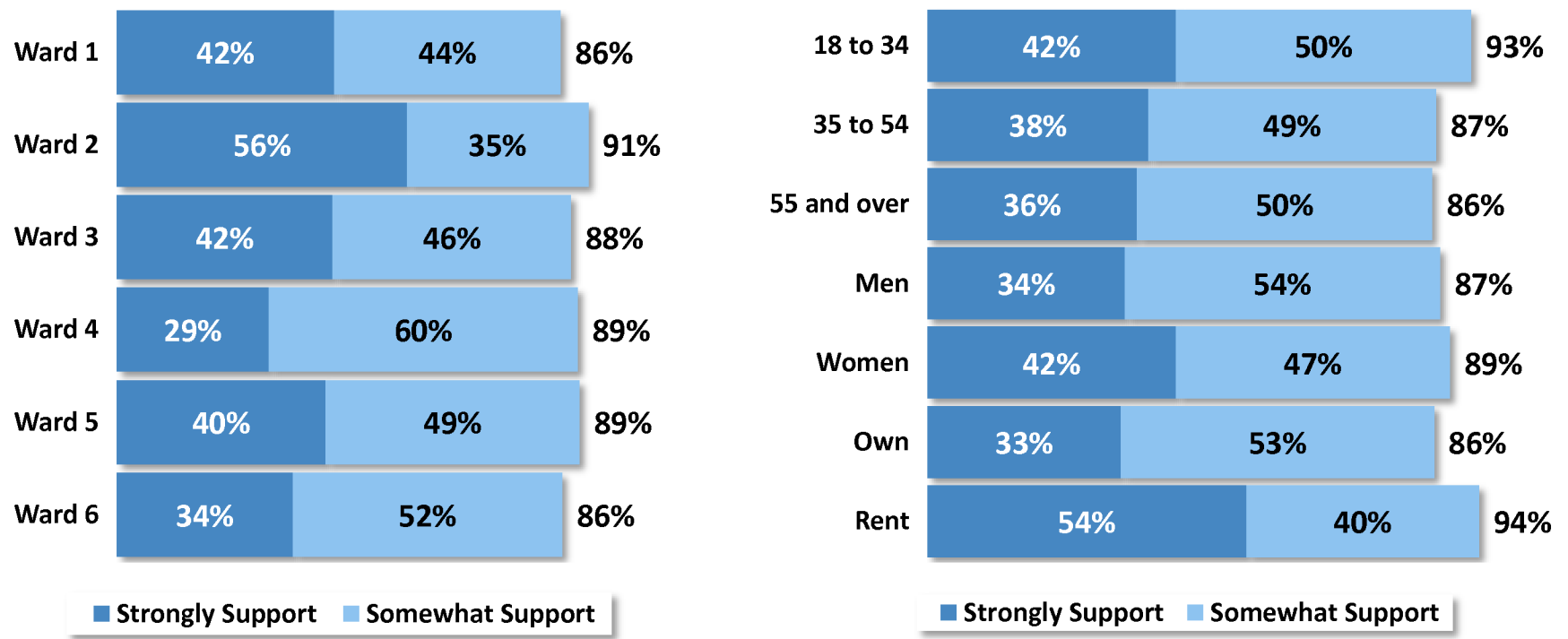
- At first blush, residents express widespread support (91%) for municipal investments in facilities and programs such as the Oakville Centre for the Performing Arts, Oakville Galleries, Central Library, Centennial Square, and access to the waterfront. Notably, almost half provide strong support, whereas 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.

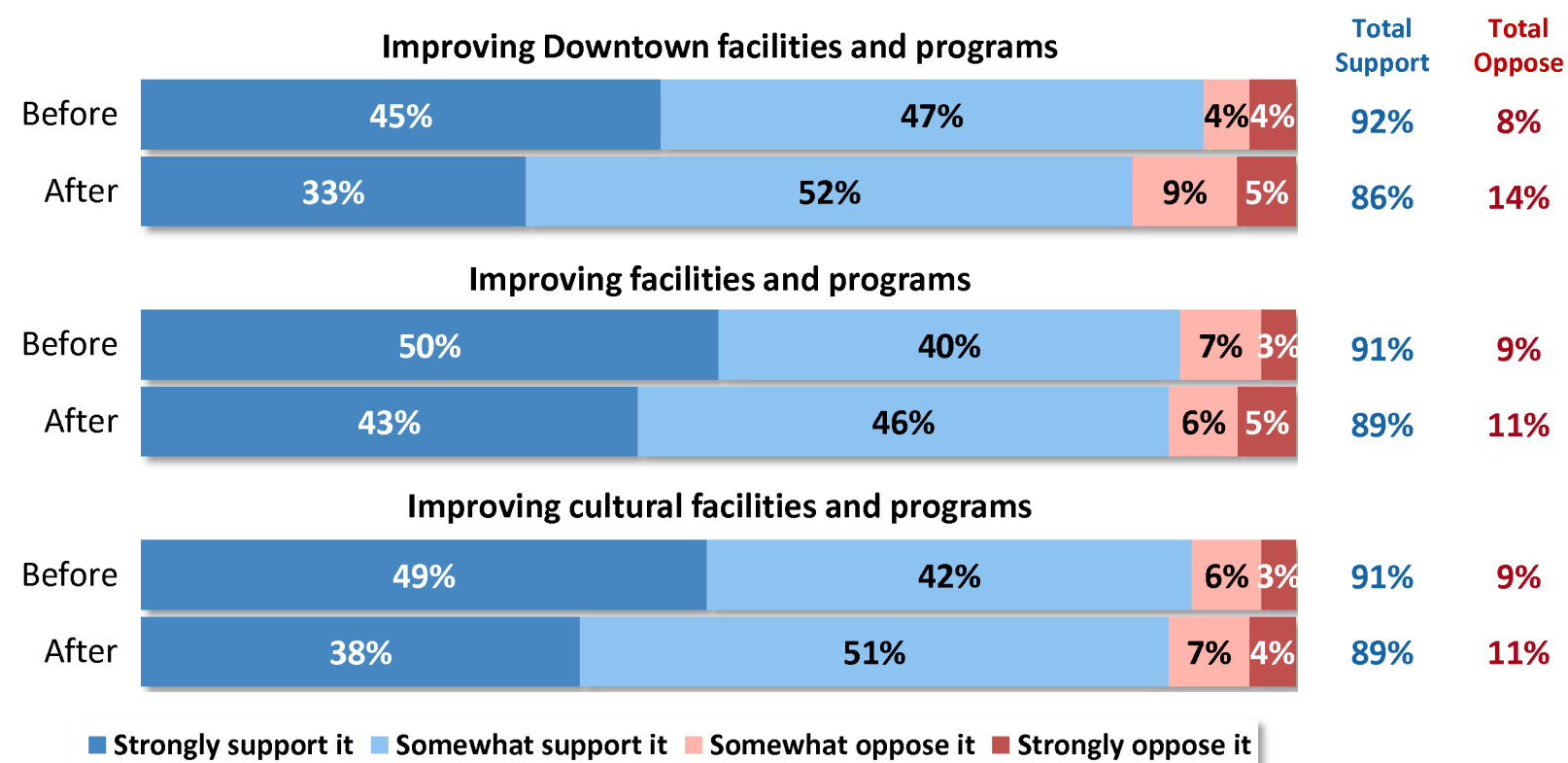


These figures report the results of the support question posed following the detailed project description. They also combine all three wording versions used

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

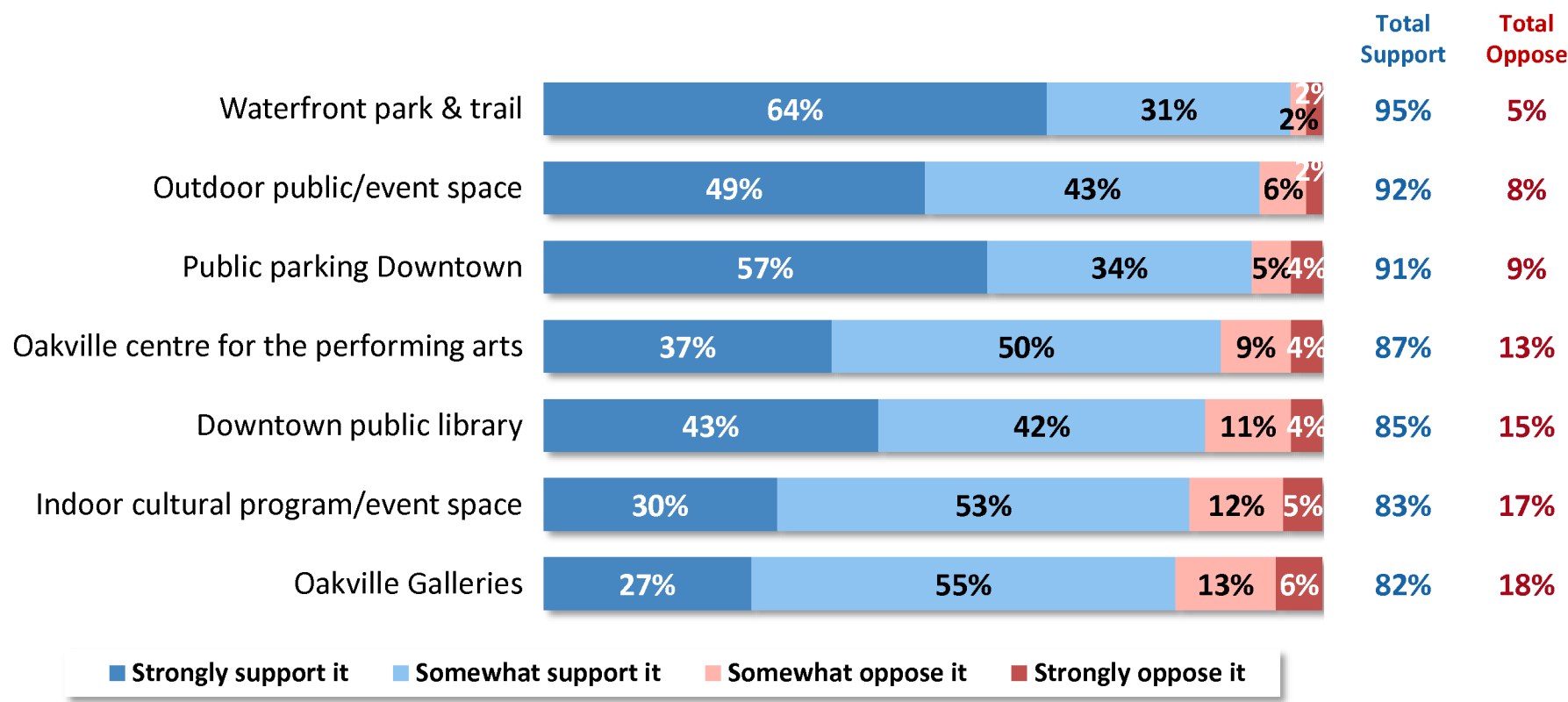
- Different groups of survey respondents were asked the support questions using these three slightly different wordings.
- However, there is no statistically significant difference in support based upon the terms used.



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.

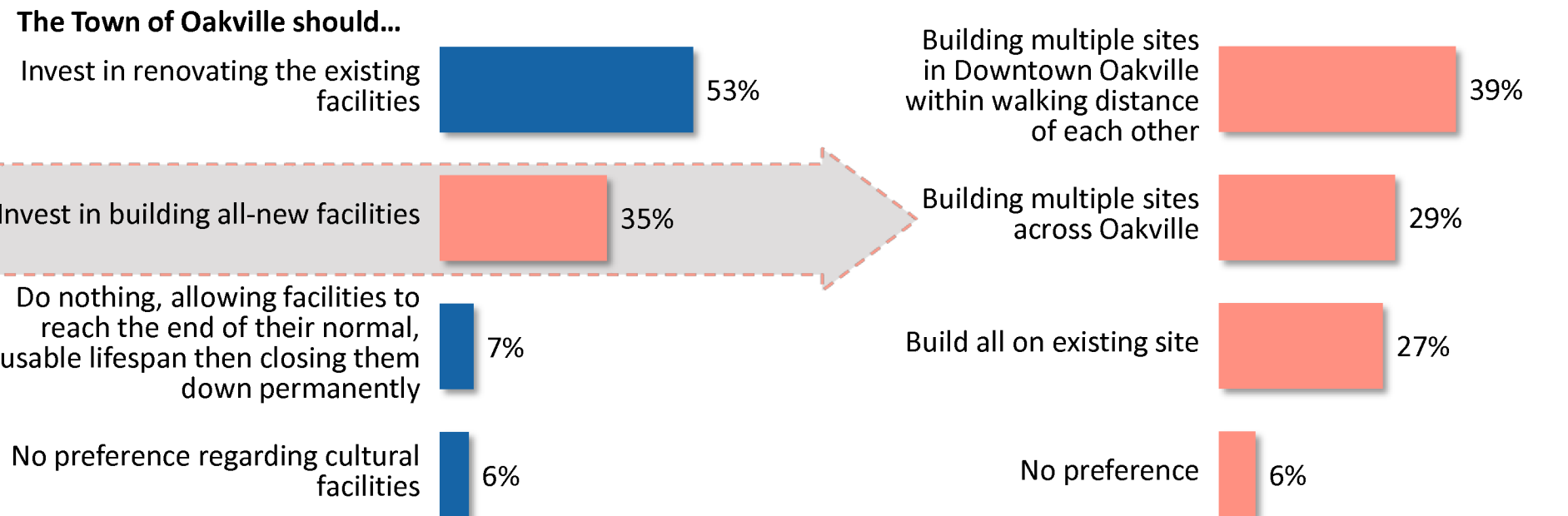


How much would you support or oppose the Town of Oakville making significant investments to maintain or improve the following ? N=809

# 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.*



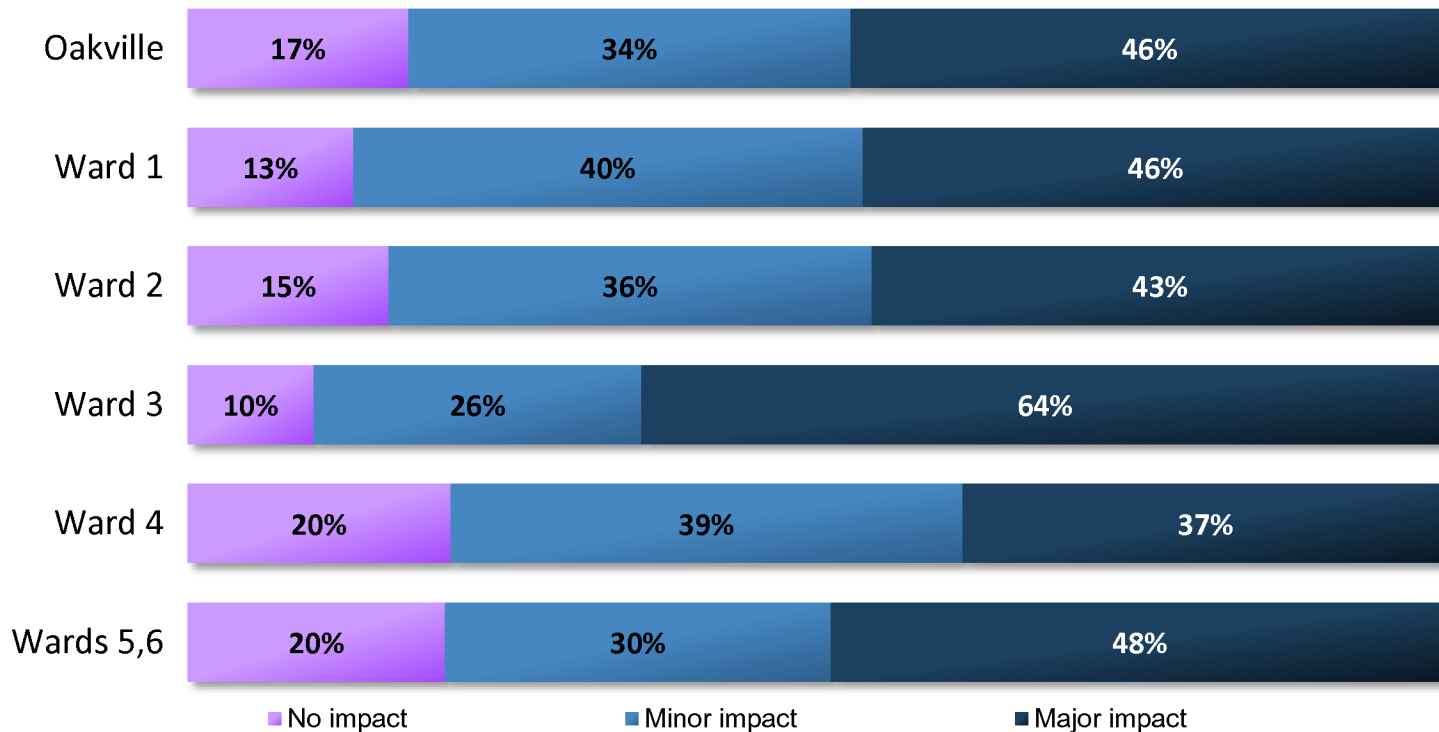
*Which one of the following would be your preference for the approach the Town should take towards dealing with this issue? N=809*  
*Thinking about the facilities, events and programs described in my previous question, which one of the following options would be your personal preference regarding location?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

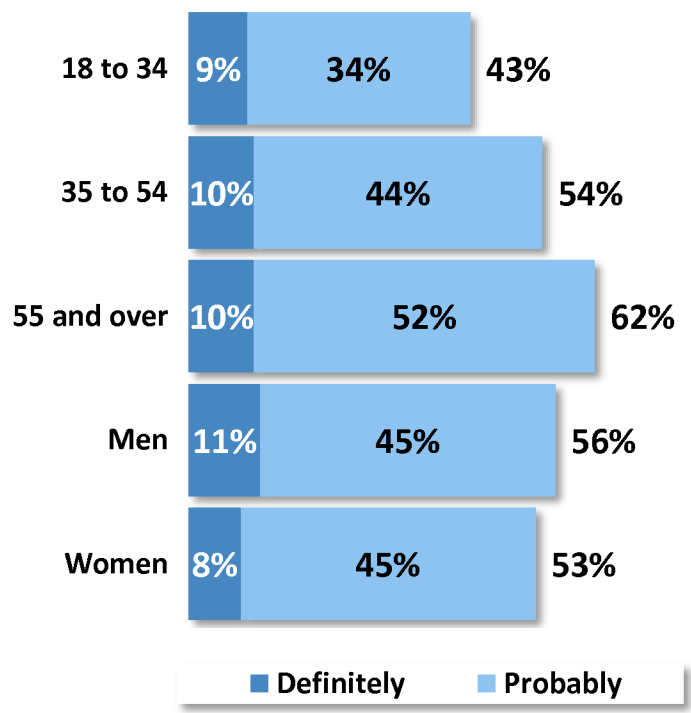
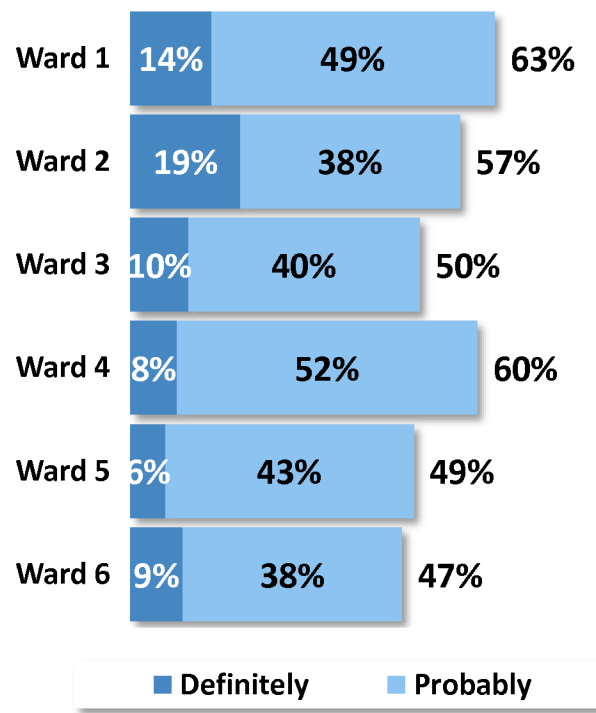
- Residents are split regarding their willingness to pay increased property tax to fund cultural investments, **but opposition is twice as intense as support.**



*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

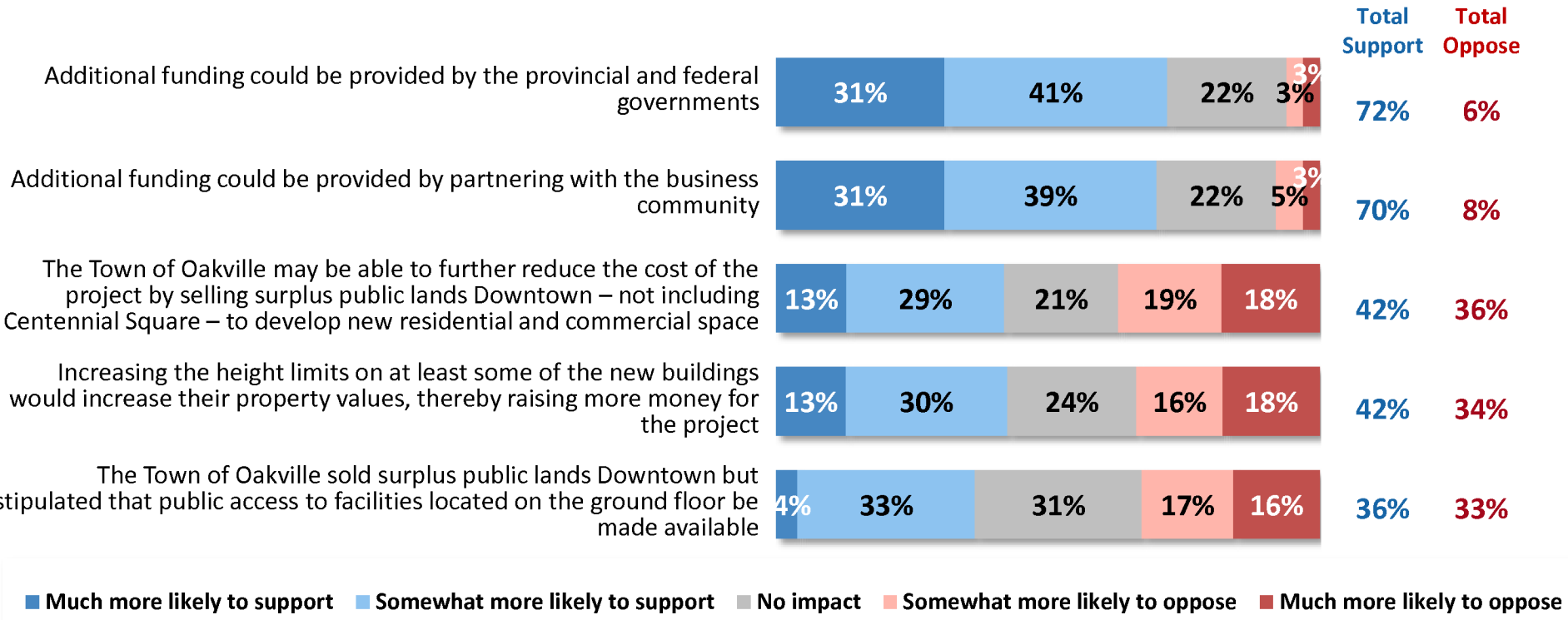
- Willingness to pay additional tax varies between the wards from 47% in Ward 6 to 63% in Ward 1. In all wards, most responses are *probably* rather than *definite*.
- Willingness to pay additional tax increases with age. Men and women offer similar responses.



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

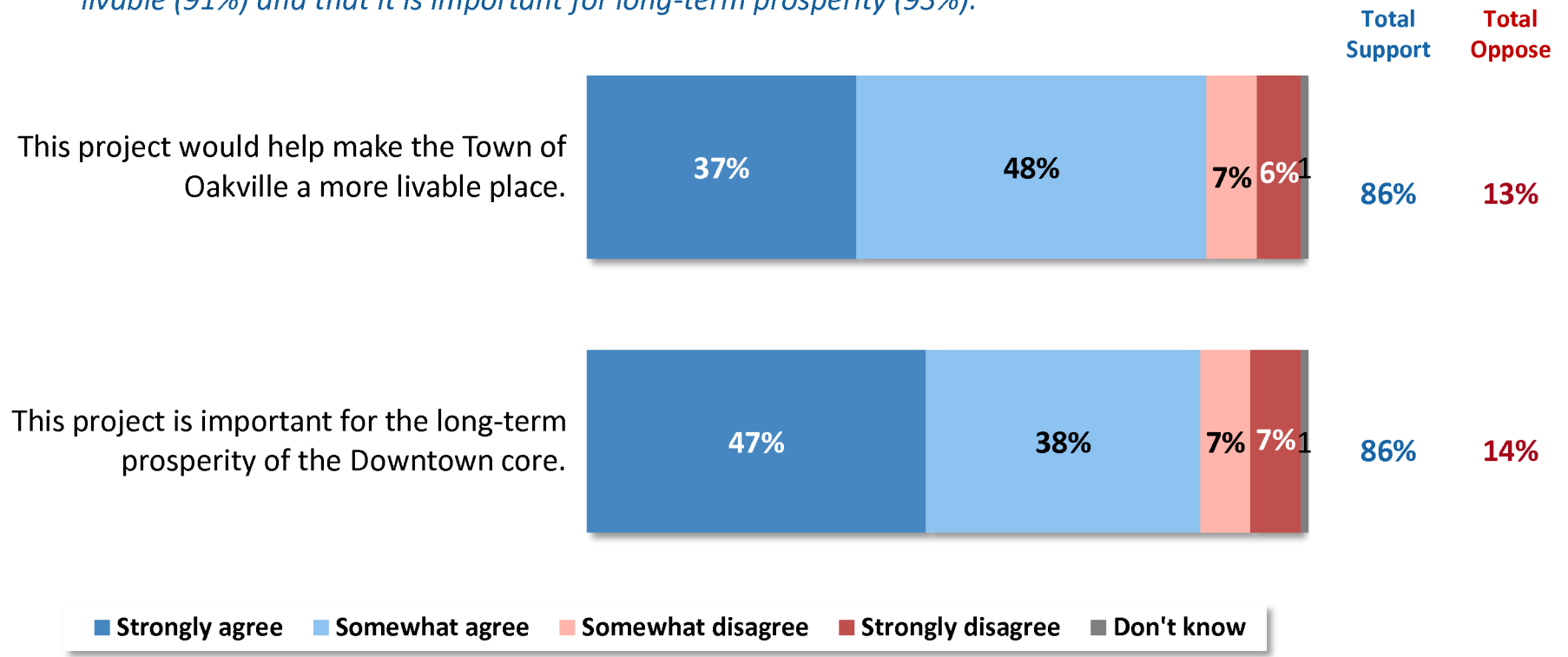
- Additional funding from the provincial and federal governments would make residents more supportive of investments in cultural facilities as would financial contributions from the business community.
- In comparison, the sale of city land downtown is less likely to increase support for cultural investments, 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.



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.



**Craig Worden**

**Executive Vice President**

**[CraigWorden@pollara.com](mailto:CraigWorden@pollara.com) | 416.921.0090 Ext. 2235**