



2023 Year
in Review

DEVELOPMENT & HOUSING MONITORING REPORT



Planning, Building & Development
4/9/2024

Development & Housing Monitoring Report

2023 Year in Review

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SECTION 1 POPULATION

The 2021 Census recorded a population of 94,415 people in the City of Niagara Falls which is a 7.2% increase from the 2016 population of 88,071 (or 6,344 people) (Figure 1). Statistics Canada projected a population estimate for the City of Niagara Falls as of July 1, 2022 to be 99,007¹ people. Statistics Canada has not provided a population estimate for July 2023. The next Census is scheduled for May of 2026.

Canada's population growth accelerated to 3.2% in 2023, one of the fastest rates in the world largely due to immigration, as the nation added 1.25 million people. Canada's population was estimated to be 40,528,396 on October 1, 2023, an increase of 430,635 people from July 1, 2023. This third quarter of 2023 population growth was the highest population growth rate in any quarter since the second quarter of 1957.

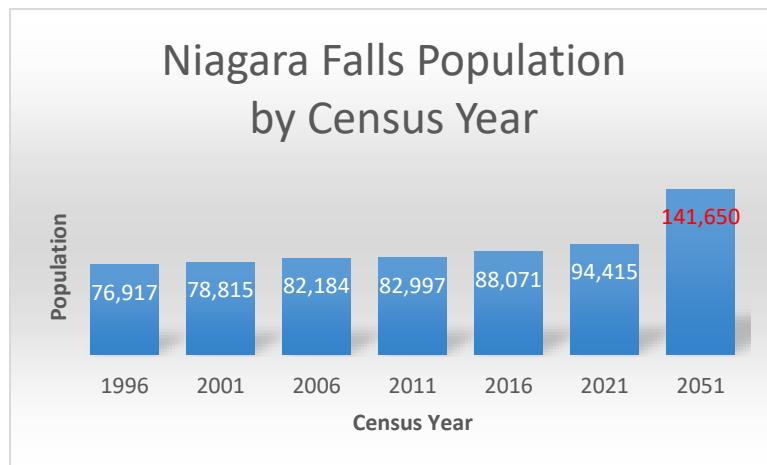


Figure 1 Source: Statistics Canada

Niagara Region, through its new Official Plan provided the City of Niagara Falls with a population target of 141,650 people by the year 2051. While Niagara Falls is projected to be considerably larger in 2051, the City's age composition will be greatly different. Figure 2 illustrates that the largest increase in the population will be in the age category 65-100 years. Such a large growth in the senior population will put increased pressure on the City's services, programs and facilities. Further, the aging population will also have impacts on transportation, housing mix and community design going forward.

¹ Source: Stats Canada Population Estimate for Niagara Falls as of July 1, 2022 Table 17-10-0142-01, Population estimates July 1, by Census subdivision, 2016 boundaries.

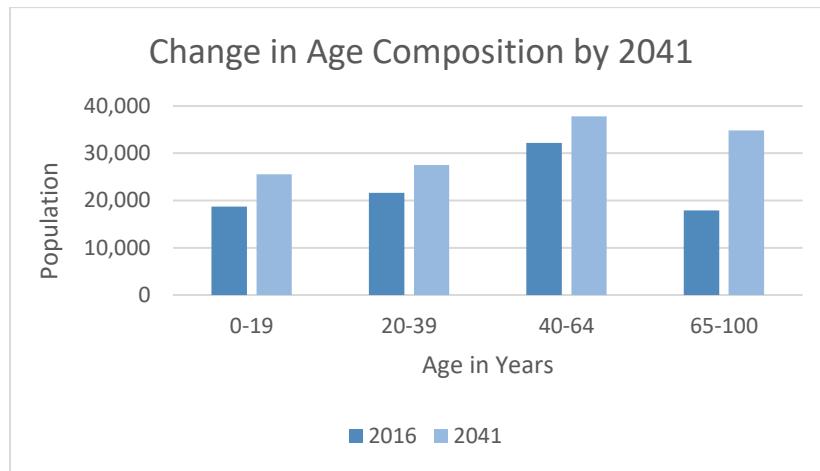


Figure 2 Source: Niagara Region Population Projections 2041 (2051 Age-Composition not yet available)

Household size in the City of Niagara Falls has decreased over time from 3.0 persons per household in 1996 to 2.5 persons per household as reported in the 2021 Census. The decrease in household size is due to a number of factors that include a slowdown in family formation, an increase in the number of lone parent families and more people living alone. It is expected that this trend will continue into the future and was confirmed in the 2021 Census results. With an ever decreasing household size and the fact that currently 66% (2021 Census data) of all dwellings in Niagara Falls are single detached (consisting of multiple bedrooms), it can be concluded that Niagara Falls is over-housed.

The City's current population of 94,415 people represents a 20% share of Niagara Region's total population of 477,941 for 2021 (Figure 3.1). The City's projected population of 141,650 people (Figure 1) will represent 21% of the Region's 2051 forecasted population of 694,000 people. Generally speaking, the proportion of the City's population relative to the Niagara Region's population as a whole through 2051 is expected to remain the same. (Figure 3.2)

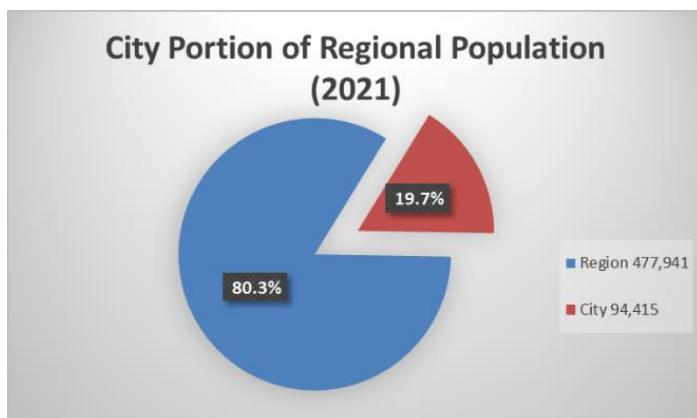


Figure 3.1 Source: Niagara Region, Growth Forecast 2051

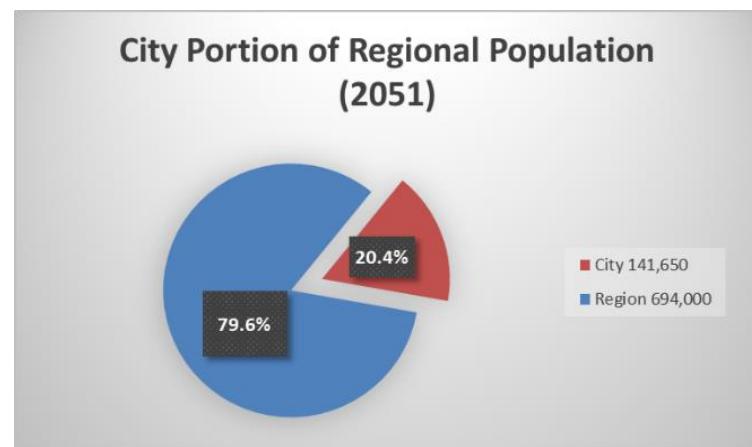


Figure 3.2 Source: Niagara Region, Growth Forecast 2051

SECTION 2 BUILDING PERMIT ACTIVITY

RESIDENTIAL CONSTRUCTION

Building permit activity is a standard indicator of local investment and local economic activity.

Under Bill 23, *More Homes Built Faster Act*, the Province's 10 year housing target for Niagara Falls is 8,000 new housing units to be constructed by 2031, which translates into 800 new housing units constructed annually for the next 10 years. On average over the last 10 years, the City has witnessed the construction of only 595 units of housing annually. However, the City has seen a steady increase in the 10 Year Average of housing units constructed since 2016.

In recognition of a challenging economic climate where construction financing has become harder to secure, and the costs of carrying much higher while the prices of many raw materials have remained high post-pandemic, the Province has issued the City a modified housing target of 587 new housing units or 80% of the annual target contained in our Housing Pledge.

Despite the challenging economic climate, a review of building permit activity shows that the City of Niagara Falls surpassed its Provincially modified 2023 housing target of 587 units with building permits issued for 643 new units of housing.

Annual Building Permits by Type

| Year | Single | Semi | Townhouse | Apartment | Total | 10 Yr Avg |
|--------------|--------------|------------|--------------|--------------|--------------|-----------|
| 2023 | 42 | 8 | 123 | 415 | 588 | 595 |
| 2022 | 133 | 10 | 421 | 0 | 564 | 574 |
| 2021 | 219 | 62 | 352 | 227 | 860 | 549 |
| 2020 | 79 | 6 | 203 | 285 | 573 | 499 |
| 2019 | 196 | 16 | 75 | 5 | 292 | 464 |
| 2018 | 155 | 38 | 83 | 218 | 494 | 326 |
| 2017 | 285 | 38 | 212 | 10 | 545 | 438 |
| 2016 | 625 | 2 | 98 | 95 | 820 | 412 |
| 2015 | 474 | 4 | 192 | 117 | 787 | 353 |
| 2014 | 286 | 24 | 113 | 0 | 423 | 304 |
| 2013 | 273 | 22 | 92 | 0 | 385 | 297 |
| 2012 | 204 | 16 | 95 | 0 | 315 | 300 |
| 2011 | 181 | 6 | 60 | 110 | 357 | 297 |
| 2010 | 191 | 12 | 22 | 0 | 225 | 286 |
| Total | 3,343 | 264 | 2,141 | 1,482 | 7,228 | |

Figure 3 Source: Niagara Falls Building Permits, 2023

For an accurate year to year comparison, the 55 shelter beds at 5925 Summer Street were not included in Figure 3's 2023 building permit total thereby resulting in 588 new residential units for 2023. This still

meets the modified housing target of 587 units, set out by the Province for 2023. Shelter beds were excluded as they do not constitute a permanent housing unit, and generally do not meet the standard of 1 Housing Unit (Sleeping space, sanitary facilities, cooking facilities, private ingress/egress).

In summary of Figure 3, in 2023 new residential building permits were issued for:

- 42 single detached dwellings
- 8 semi detached dwellings
- 123 townhouse units
- 133 apartment units
- 37 accessory dwelling units (basement apartments) (This information has not been reported to CMHC)
- 12 conversions as reported by CHMC
- 12 apartment units created through renovations in a mixed use setting (This information has not been reported to CMHC)

As well, Building staff issued building permits for:

- a long-term care centre (6747 Oakwood Drive) 200 rooms/288 beds. (included in Apartment)
- a bridge and permanent supportive housing facility at 5017 Victoria Avenue containing 21 residential suites (Included in Apartment)
- a homeless shelter located at 5925 Summer Street containing 55 beds (Not included in Figure 3).

All together in 2023, 643 new units of housing were created in the municipality.

The composition of building permits issued in 2023 was heavily weighted towards apartment and townhouse units that made up 71% and 21% of all permits respectively. Single detached housing made up 7% of all new building permits and semi-detached homes made up just 1%. Townhome and

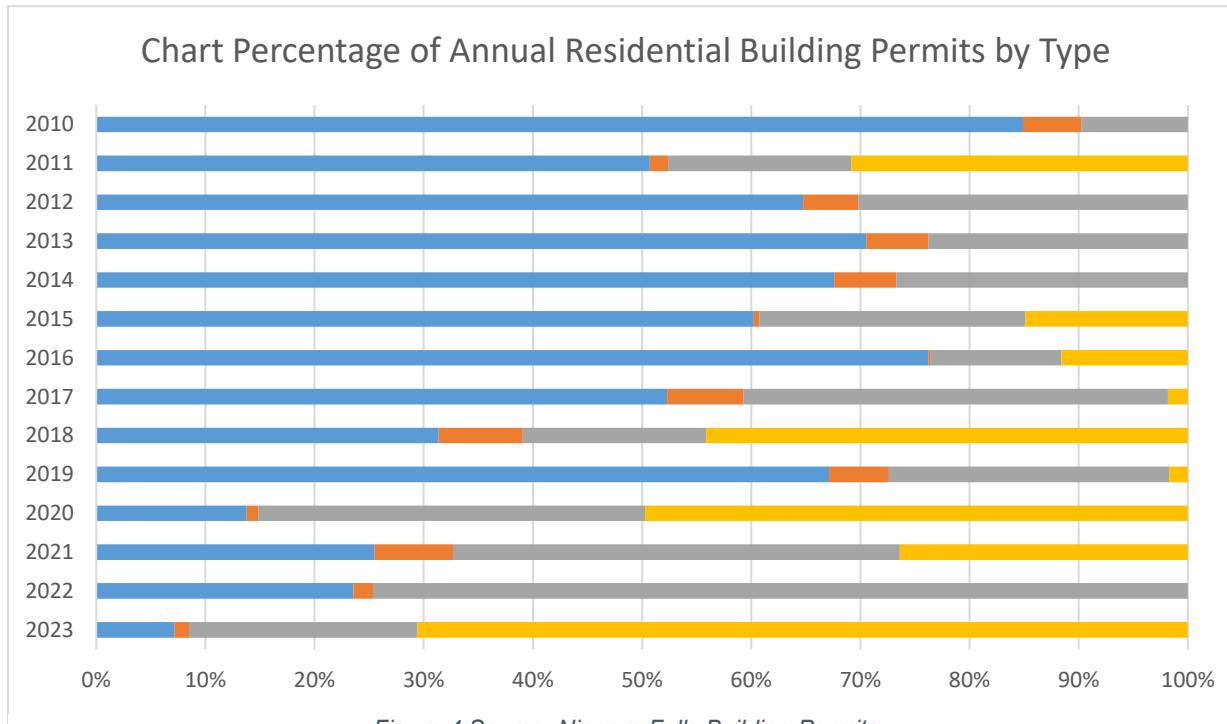


Figure 4 Source: Niagara Falls Building Permits

apartment development has accelerated in recent years as housing prices have continued to rise, and for many represents the new entry point into the housing market. Single detached housing continues to outpace semi-detached construction as they are generally seen to be more desirable by those already established in the housing market.

Another emerging trend in the City is of multi-generational housing. Driven by higher real-estate prices and influenced by practices found in many European and Asian countries (of which contribute a significant portion of Canada's immigration demographic), homes that house three generations of a family (parents, children, and grandchildren) are considered multigenerational. Across Canada, multigenerational housing has seen a 50% increase since 2001, compared to a 30% increase in the country's population. Approximately 6% of Canada's population lives in multigenerational housing as of 2021.

Figure 4 shows that over the past 12 years the number of building permits issued has not been consistent however, it is important to note that the rate of growth (10 year average) has continued to accelerate since 2016. In the past, single detached housing has dominated new construction followed by townhouse units. Since 2017, single detached housing has represented a smaller percentage of the total number of residential units built in the City as more semi, townhouse and apartment units have been constructed. It is anticipated that as the cost of land rises along with the cost of new housing, this will continue to reduce the proportion of single detached dwellings constructed in the City. (Figures 5 & 6)

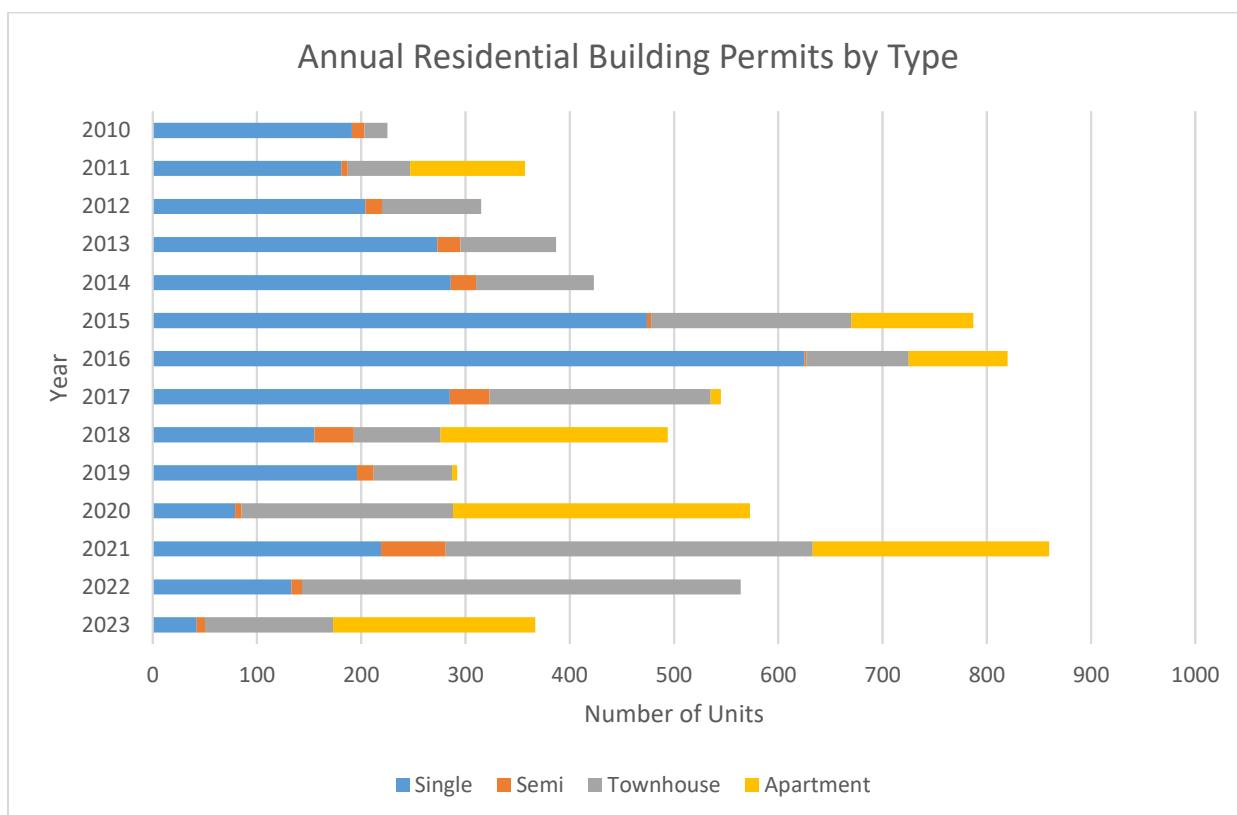


Figure 5 Source: Niagara Falls Building Permits, 2023

Affordable Housing

The City's housing strategy has set a target that 40% of the new housing to be built annually be affordable to households in the moderate to high income earning brackets, with a household income not more than \$103,572 per year. Housing units affordable to this income bracket are priced below \$539,460 (The affordable units that are being proposed would all be categorized as being affordable to those in the higher moderate income brackets). Affordability is currently assessed by the value of the construction permits provided by the builder. There is a lack of reliable sources that track the sale prices of new-build only residential sales.

With respect to the construction of housing deemed to be affordable, Q3 and Q4 of 2023 showed that approximately 97.5% of townhome and apartment new build construction permits could be categorized as affordable housing for moderate income households (earning between \$95,900 - \$103,572 annually). In order to meet this criterion, the value of the new build construction must be equal to or less than \$539,460.

Beginning in the first quarter of 2024, staff will use construction values provided by the Ontario Large Municipalities Chief Building Officials (OLMCBO) to better assess the affordability of new construction homes. The OLMCBO will provide valuations closer to the actual sale price of new construction homes. With Niagara Region's approval of the City's new Housing policies in the first quarter of 2023, Development staff have been recording the number of potential affordable housing units contained in planning applications. In 2023, it was calculated that approximately 1,603 proposed housing units were considered to be affordable.

NEW RESIDENTIAL STARTS AND COMPLETIONS

Housing starts are the beginning of the housing construction cycle and completions are the end of the construction cycle. As detailed earlier in this report, there has been multiple categories of housing starts not reported by CMHC. CMHC focusses on new-build developments, thus the CHMC reported starts number (i.e. 389 units) does not align with the true number of new housing production that has occurred in Niagara Falls in 2023. For example, their report lacks the numbers of additional dwelling units created through basement apartments or existing residential structures who add more housing units through renovations, such as apartments units created above a retail store. Other housing projects, such as long-term care shelters, or other similar care and housing projects are not included in CMHC reporting.

Across Canada, housing starts in general for 2023 have been down and the overall decrease in Canadian housing starts can be attributed to the economic factors of high interest rates and inflation suppressing the demand for new housing. Further labour shortages in the construction industry are impacting housing starts. In Niagara Falls, residential starts can be expected to increase in 2024 and beyond as interest rates are expected to ease and the City aggressively moves towards achieving the target of 800 new housing units per year as set out in our Municipal Housing Pledge.

Residential completions fell in 2023 from 2022's completion number. 2023 saw 590 completions of all types, compared to 2022's 846 completed units.

RESIDENTIAL STARTS AND COMPLETIONS (ALL TYPES)



Figure 6 Source: CMHC Reported Units, 2023

INDUSTRIAL/COMMERCIAL/INSTITUTIONAL (ICI) CONSTRUCTION

The City experienced a small decrease in the value of new ICI construction with a value of \$23.0 million, which is a slight decrease from 2022's \$24.8 million. This represents about a 7% decrease in new ICI construction value. These numbers show a trend of new ICI construction returning to pre-2019 peak levels. This is not concerning as two key high value projects resulted in higher than typical ICI construction values in 2019 and 2020 with the construction of the OLG Stage at Fallsview Casino and the construction of Costco in 2019 and 2020, respectively. ICI construction is expected to increase in the future as the city continues to grow and the economy diversifies.

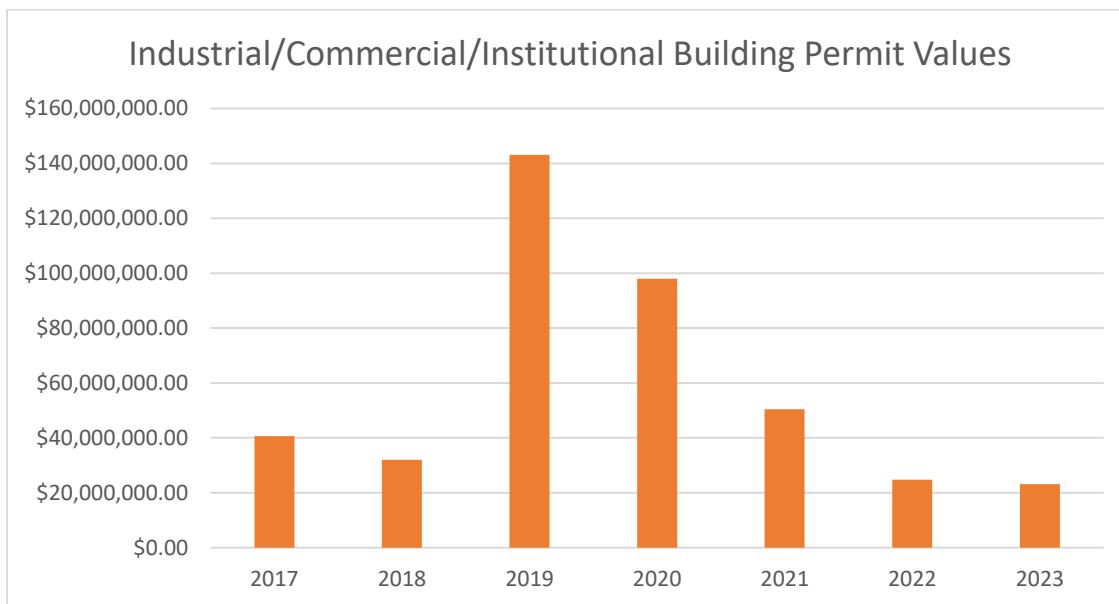


Figure 7 Source: Niagara Falls Building Permits, 2023

A further breakdown of the ICI permits shows that in 2023 the total value of Industrial construction was \$13.5 million, a 23% decrease from 2022's \$17.5 million. In 2023, this construction is broken down into \$8.8 million in new construction, and \$4.8 million for renovations and alterations to existing industrial structures. For commercial uses, 2023 saw a total \$18.4 million, a 41% decrease from 2022's \$31 million. Broken down further, in 2023 new construction commercial was \$725,000, and renovations and alterations to existing commercial uses had a value of \$17.7 million. For institutional uses, 2023 saw a total value of permits of \$18.1 million, a 30% increase from 2022's value of \$14 million. Broken down further, the value of new construction institutional uses in 2023 was \$13.5 million, and renovations and alterations to existing institutional uses was \$4.6 million. Overall, this is a 20% decrease to the total value of ICI permits from 2022. (Figure 12)

ICI Construction Permits: New vs. Alterations, 2022 vs. 2023

| | New Construction 2023 | Reno/Alt 2023 | All Construction 2023 | New Construction 2022 | Reno/Alt 2022 | All Construction 2022 | % Change |
|---------------|----------------------------|----------------------------|----------------------------|-------------------------------|-------------------------------|-------------------------------|-------------|
| Industrial | \$8,750,000 | \$4,765,000 | \$13,515,000 | \$15,000,000 | \$2,500,000 | \$17,500,000 | -23% |
| Commercial | \$725,000 | \$17,693,370 | \$18,418,370 | \$5,900,000 | \$25,100,000 | \$31,000,000 | -41% |
| Institutional | \$13,510,000 | \$4,628,600 | \$18,138,600 | \$3,400,000 | \$10,600,000 | \$14,000,000 | 30% |
| Total | <u>\$22,985,000</u> | <u>\$27,086,970</u> | <u>\$50,071,970</u> | <u>\$24,300,000.00</u> | <u>\$38,200,000.00</u> | <u>\$62,500,000.00</u> | -20% |

Figure 9 Source: Niagara Falls Building Permits, 2023

2023 Top Industrial/Commercial/Institutional Building Permits

| Project | Building Construction Permit Value |
|--|------------------------------------|
| Hospital Foundation Permit | \$9.9 M |
| 6380 Fallsview Blvd – Casino Renovation | \$5 M |
| 9061 Garner Rd – New Industrial Building | \$5 M |

Figure 10 Source: Niagara Falls Building Permits, 2023

TOTAL BUILDING PERMIT ACTIVITY: NEW AND ALL CONSTRUCTION

The total value of new construction activity in the City in 2023 was \$133.4 million (Figure 11) which is 39% lower than the 2022 value of \$218.6 million. In 2023, residential construction represented 83% of the total value of new construction, followed by institutional at 10% (\$13.5 million), industrial at 7% (\$8.8 million), and commercial at 1% (\$725,000). Comparing 2023 against 2022, residential new construction made up a similar proportion of new construction value, as did industrial.

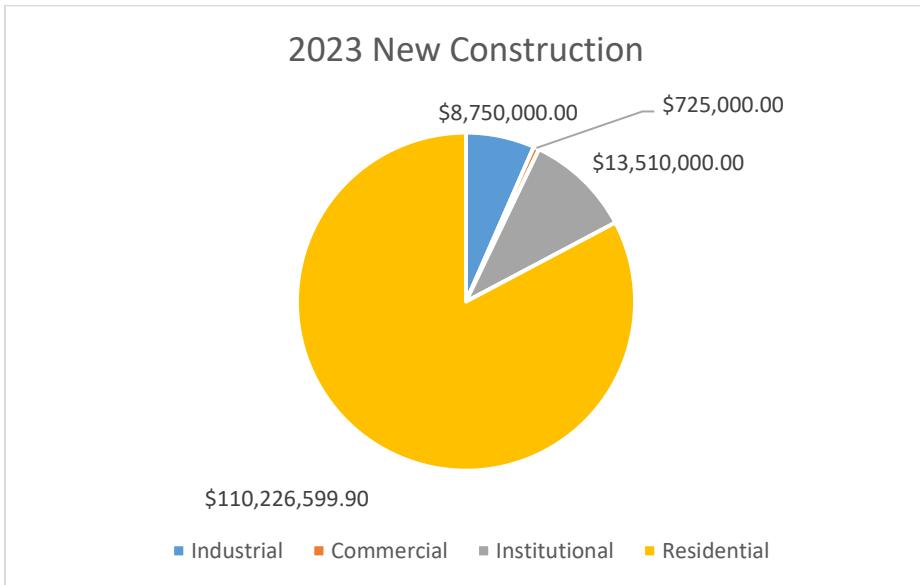


Figure 11 Source: Niagara Falls Building Permits, 2023

In comparison, the total value of all construction in Niagara Falls which includes new builds, additions and renovations was \$177 million (Figure 12) a 35% decrease compared to \$274 million recorded in 2022. Residential construction activity represented the largest proportion at 71% (\$126 million), commercial at 10% (\$18.4 million), industrial at 8% (\$13.5 million), and institutional at 10% (\$18.1 million).

Since the peak value of \$313 million recorded in 2021, the value of construction activity has decreased in both 2022 and 2023. The lower value of construction activity is likely caused by the weight of higher interest rates that are slowing economic growth and more specifically construction activity. As well, with the completion of major projects in 2019 and 2020 (Costco, OLG Fallsview), construction values have returned to their pre-2019 trajectory.



Figure 12 Source: Niagara Falls Building Permits, 2023

SECTION 3 REAL ESTATE AND RENTAL MARKET

RESIDENTIAL REAL ESTATE MARKET

The real estate market in Niagara Falls weakened in 2023 with a 11% decrease in the average price for residential real estate. The average price for a house in Niagara Falls in 2023 was \$638,341.67, compared to 2022's average of \$719,366.67, as demonstrated in Figure 13.

It is anticipated that housing prices should rebound in 2024, as intra-provincial migration remains strong and that the Bank of Canada has indicated that it will begin to lower the overnight lending rate in the second half of 2024 as inflation cools², thereby bringing buyers back into the housing market.



Figure 13 Source: Niagara Association of Realtors Annual Residential Overview, 2023

VACANCY RATES & AVERAGE RENTAL COSTS

The City uses Canadian Mortgage and Housing Corporation (CMHC) data to track vacancy rates for rental housing. Overall, the vacancy rate for Niagara Falls dropped by 0.1% from 2022's rate of 2.7% to 2.6% in 2023. (Figure 14) CMHC records rental vacancy in Niagara Falls core area, and the remainder of the city. The vacancy rate in the Niagara Falls Core for 2023 was 4.1% and in the remainder it was 1.1%, which averages to a rate of 2.6%. A vacancy rate of 3% is traditionally accepted as a healthy vacancy rate as it provides a sufficient choice of housing for tenants.

² Source: "Advice for Homeowners after the Bank of Canada rate decision" TD Bank; TD Stories.

The Core encompasses the downtown and built centre of the city, running along Niagara River Parkway, and River Road until it meets the Power Canal, following the canal until Dunn Street and then meeting with Niagara River Parkway. The Core includes the oldest parts of Niagara Falls, such as the Queen Street downtown area, as well as the newer economic centres, such as Clifton Hill, and the casinos. Significant parts of Lundy's Lane are also found in the Core.

With respect to rents, the average rental cost for a dwelling unit in the Niagara Falls core area was \$1,217, with the median rent at \$1,237. CMHC estimates that there is an inventory of 1,951 rental units in the Core. For the remainder of the city, the average rental price was \$1,343, with a median price of rental for \$1,203, and an estimated 1,520 units of rental housing stock. This equates to an average rent across the city of \$1,280, and an estimated 3,471 rental units in the city. Specifically for 2-bedroom rental units in the St Catharines-Niagara Census Metropolitan Area (CMA), the average rent was \$1,388 in 2023. This is a 10% increase from 2022's recorded rental average of \$1,260.

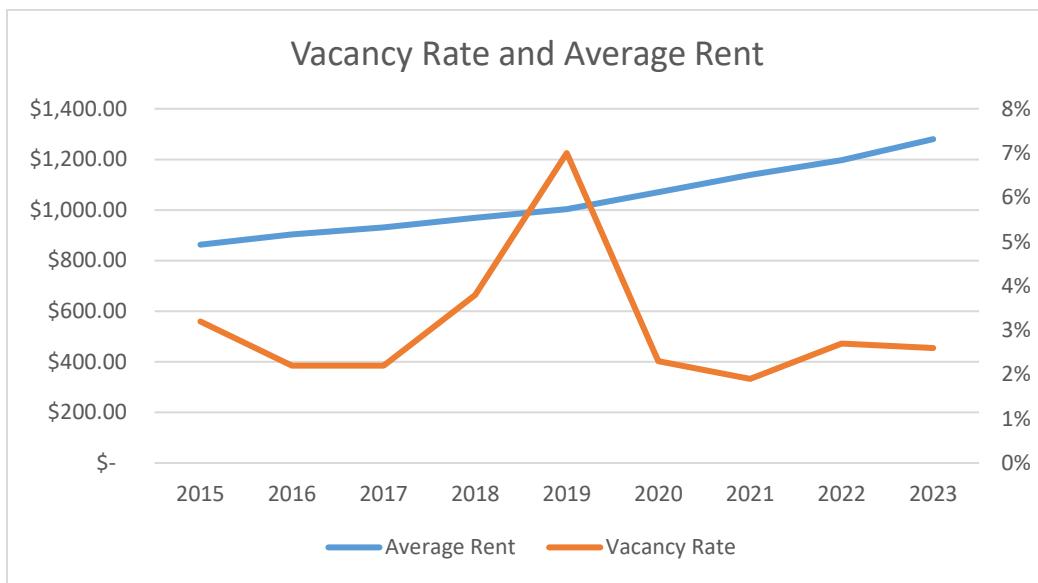


Figure 14 Source: CMHC Rental Market Survey 2023

Vacation Rental Units

For Vacation Rental Units (VRUs), in 2023 there was a total of 37 registered VRUs in the city. Of these 37 units, 17 were registered in 2023. As this is a new metric being tracked for 2023, historical data on new and existing VRUs in the city is not accurate enough to warrant inclusion in this report. Going forwards, VRU registrations will be tracked and reported in the quarterly and annual reports on Housing.

SECTION 4 LAND SUPPLY

The 2020 Provincial Policy Statement requires at least a 3 year supply of draft approved and registered units with servicing capacity to ensure a healthy supply of soon to be buildable lots. The Niagara Falls Official Plan, through its Growth Objectives, has a similar requirement.

DRAFT PLANS OF SUBDIVISION

In 2023, three new subdivisions were given draft plan approval, Mewburn (28 units), Grand Niagara (at least 3,558 units), and 9304 McLeod Road (498 units, under appeal). In all draft approved subdivisions (as of December 31, 2023) there are 5,964 units. (Figure 15) With respect to draft approved units, most units are located within the Greenfield Area. Generally speaking, the Greenfield Area for Niagara Falls is predominantly located in the south end of the City.

The new Grand Niagara subdivision which proposes 3,558 to 5,387 housing units has not yet provided a definitive lot by lot breakdown of housing types. It should be noted that the majority of the housing proposed in the Grand Niagara Plan would be classified as multiples (i.e. townhouses street and block and apartments). As Grand Niagara has not provided a breakdown of housing units by type, the following numbers are calculated independently of Grand Niagara's 3,558 units, using a total of 2,376 units. Within the Greenfield Area, approximately 46% of the available units were for single detached, 52% were for multiples (townhouses and apartments), and 2% were for semi-detached dwellings.

In 2023 there remains one draft approved subdivision for 30 units in the City's Built-Up area boundary, St Thomas Moore, as seen in Figure 15.

| DRAFT APPROVED SUBDIVISIONS DECEMBER 2023 | | | | | | | |
|---|---------------------------------|--------------------|-----------------|-----------|--------------|--------------|-----------|
| Built Boundary | SUBDIVISION NAME | COMMUNITY | NUMBER OF UNITS | | | | |
| | | | Single | Semi | Multiples | | |
| Built Boundary | St Thomas More | | 18 | | 12 | 30 | |
| | | | Total | 18 | 0 | 12 | 30 |
| Greenfield Area | | | | | | | |
| | 1198815 Ontario Inc (Garner Rd) | | 46 | 0 | 23 | 69 | |
| | Riverfront Subdivision | Drummond | 371 | 0 | 389 | 760 | |
| | Chippawa East Subdivision | Chippawa | 449 | 48 | 429 | 926 | |
| | Sodom Road (Polocorp) | | 18 | 0 | 77 | 95 | |
| | 2700 Mewburn Road | | 0 | 0 | 28 | 28 | |
| | 9304 McLeod Rd | | 203 | 0 | 295 | 498 | |
| | Grand Niagara | | - | - | - | 3,558 | |
| | | Total | 1,087 | 48 | 1,241 | 5,934 | |
| | | TOTAL UNITS | 1,105 | 48 | 1,253 | 5,964 | |
| Multiples include apartments, townhouses (street and block) | | | | | | | |

Figure 15 Source: Niagara Falls Planning, Building & Development, 2023

REGISTERED PLANS OF SUBDIVISION

In 2023, only one new plan of subdivision was registered in Niagara Falls with Garner Place (59M-510) adding 67 new residential units to the total of registered lots. Accordingly, at the end of 2023 there were 944 units available for immediate construction. (Figure 16)

Overall, the City has a supply of 944 registered units with 324 units (37%) available in the Built Area Boundary and 539 units (61%) available in Greenfield Areas.

NIAGARA FALLS - VACANT LOTS/UNITS IN REGISTERED PLANS - DECEMBER 2022

| | SUBDIVISION NAME | COMMUNITY | REMAINING UNITS | | | |
|------------------------|---------------------------------|------------|-----------------|-----------|------------|------------|
| | | | Single | Semi | Multiple* | Total |
| Built Boundary | Westway Estates | Northwest | 0 | 0 | 32 | 32 |
| | Williams Subdivision north side | Chippawa | 4 | 0 | 0 | 4 |
| | Golia Estates | Stamford | 3 | 0 | 0 | 3 |
| | Chippawa West | Chippawa | 33 | 0 | 70 | 103 |
| | Optimist Park | Stamford | 12 | 0 | 0 | 12 |
| | Chippawa West Phase 2, Stage 4 | Chippawa | 2 | 0 | 0 | 2 |
| | Terravita | Stamford | 41 | 0 | 0 | 41 |
| | Willoughby Gardens | Chippawa | 2 | 0 | 0 | 2 |
| | Grottola Court | Stamford | 6 | 0 | 0 | 6 |
| | Chippawa West Phase 2, Stage 5 | Chippawa | 32 | 56 | 24 | 112 |
| | Beaver Valley Extension Ph 1 | Northwest | 0 | 0 | 0 | 0 |
| | Beaver Valley Corridor Ph 2 | Northwest | 7 | 0 | 0 | 7 |
| | Total | | 142 | 56 | 126 | 324 |
| Greenfield Area | Neighbourhoods of St. Davids | Stamford | 8 | 0 | 12 | 20 |
| | Deerfield Blocks 274 & 275 | Westlane | 7 | 0 | 0 | 7 |
| | Fernwood Phase 1 | Westlane | 1 | 0 | 0 | 1 |
| | Deerfield Estates Phase 8 | Westlane | 7 | 0 | 0 | 7 |
| | Warren Woods East | Westlane | 0 | 0 | 75 | 75 |
| | Windylane | Westlane | 4 | 0 | 0 | 4 |
| | Fernwood Phase 3 | Westlane | 18 | 0 | 0 | 18 |
| | German Village | Westlane | 7 | 0 | 0 | 7 |
| | Deerfield Estates Phase 10 | Westlane | 8 | 0 | 0 | 8 |
| | Oldfield Estates Phase 1 | Drummond | 28 | 0 | 15 | 43 |
| | Oldfield Estates Phase 2 | Drummond | 48 | 0 | 0 | 48 |
| | Oldfield Estates Phase 3 | Drummond | 4 | 0 | 0 | 4 |
| | Southgate Estates | Westlane | 6 | 0 | 0 | 6 |
| | Warren Woods Phase 5 | Westlane | 8 | 0 | 56 | 64 |
| | Forestview Estates | Westlane | 6 | 0 | 24 | 30 |
| | Splendour Subdivision | Westlane | 61 | 16 | 120 | 197 |
| | Garner Place | Westlane | 47 | 16 | 4 | 67 |
| | Total | | 268 | 32 | 306 | 606 |
| Agricultural | Mingle Subdivision | Willoughby | 4 | 0 | 0 | 4 |
| | Miller Road Estates | Willoughby | 3 | 0 | 0 | 3 |
| | Miller Road Estates South | Willoughby | 7 | 0 | 0 | 7 |
| | Total | | 14 | 0 | 0 | 14 |
| | TOTAL UNITS | | 424 | 88 | 432 | 944 |

Figure 16 Source: Niagara Falls Planning, Building & Development, 2023

SHORT TERM LAND SUPPLY

Based on the housing supply of 6,908 draft approved and registered units divided by the City's 10-year average Provincial housing target (800 units), the City has an approximate 8.6 year supply of draft and registered approved units. The City's 8.6 year supply exceeds the minimum requirement of 3 years contained in both the Provincial Policy Statement and the City's Official Plan. It can be concluded that the City continues to maintain a healthy supply of available land in the form of unbuilt lots/units available for development in the short term.

LONG TERM LAND SUPPLY – VACANT LAND

The long-term land supply for Niagara Falls includes those lands that are vacant with an approved Official Plan designation yet have no planning permissions. Figure 17 illustrates that there are approximately 1,096 hectares (ha) of vacant land within the City as of December 2023. It is important to note that the vacant land supply was recently bolstered by the addition of the three urban expansion areas (Northwest Niagara Falls, Garner West and Southwest Hospital Secondary Plan) for Niagara Falls identified in the Niagara Region Official Plan.

The vacant land supply of 1,096 ha is also reflective of the fact that non-developable features such as Provincially Significant Wetlands, hydro corridors and railways have been excluded. Of the total vacant land supply, 410 ha are for future employment purposes and 687 ha are for future residential purposes. It is important to note that a large percentage of the City's vacant employment land supply is owned by Cytec and therefore not available to the market.

Vacant Land within The City of Niagara Falls: December 2023

| Land Use | Built Area Boundary (Ha) | Designated Greenfield Area (Ha) | Total Area (Ha) |
|-------------|--------------------------|---------------------------------|-----------------|
| Employment | 162.9 | 246.9 | 409.7 |
| Residential | 183.9 | 502.5 | 686.5 |
| Total | 346.8 | 749.4 | 1,096.2 |

Figure 17: Source: Niagara Region, December 2023

INTENSIFICATION RATE

Provincial policy requires that municipalities promote intensification to maximize urban designated land and municipal services thereby, reducing the negative impacts of urban sprawl. In keeping with Provincial direction, a percentage of the City's annual growth must be directed to the Built Area Boundary where new development can take advantage of existing municipal services, the provision of public transit, and other existing community infrastructure and services.

The new Niagara Region Official Plan (approved by the Province in the Fall of 2022) has increased the City's intensification target from 40% to 50%. Since 2009, the City's intensification rate has ranged from a high of 77% in 2020 to a low of 11% in 2013. In 2023, most of the new construction residential building permits issued were located within the Built Area Boundary resulting in an intensification rate of 65%. As land and housing prices have increased in recent years, the market is responding with the provision of a broader mix of housing within established residential neighbourhoods.

Intensification performance has been tracked since 2009 and as seen on Figure 18, prior to 2020 the municipality has only achieved its 50% intensification target once in 2018. In the past, development has primarily occurred in the City's existing large Greenfields which can be easier to develop than land within the Built Area Boundary. An intensification rate exceeding the 50% target since 2020 for the last four years shows a continuing upward trend of development occurring within the Built Area Boundary.

Even with the increased intensification target number of 50%, the City's 2022 Housing Needs Study concluded that a significantly higher intensification target would be required to help address housing affordability. A higher intensification target would result in the provision of a broader range of housing opportunities which would help maximize our existing investments in infrastructure, decrease impacts on environmentally sensitive areas and minimize our future consumption of agricultural lands.

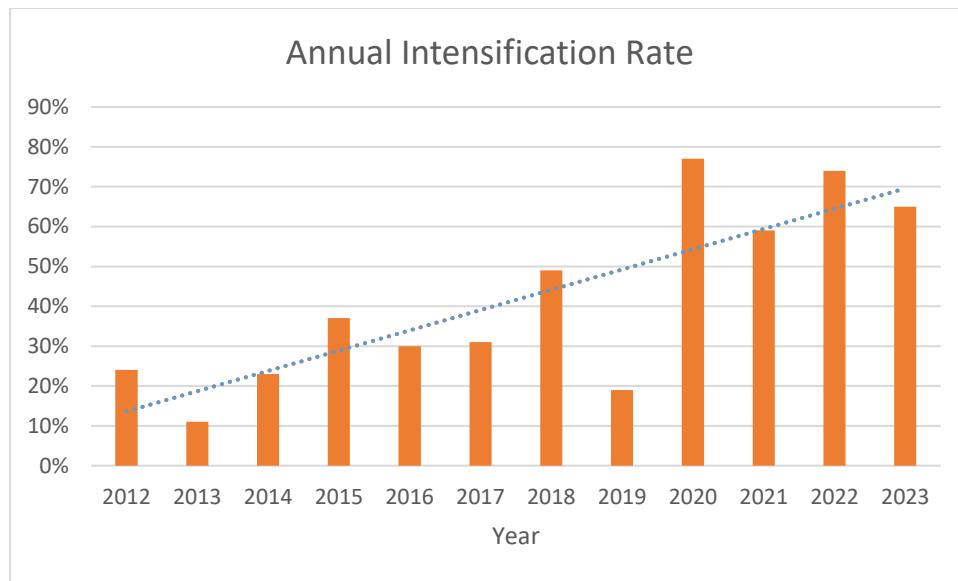


Figure 18: Source: Niagara Falls Planning, Building & Development, 2023

SECTION 5 STATISTICAL SUMMARY

This section provides a statistical summary of Planning and Building activity in 2023. A general overview of these statistics notes the following:

PLANNING SUMMARY

- The City surpassed its Provincially modified 2023 housing target of 587 units with building permits issued for 643 new units of housing.
- The overall construction value in the City was dominated by Residential construction.
- The Real Estate market prices declined likely due to the higher interest rates in 2023 compared to 2022.
- The housing supply of 8.6 years continues to exceed the Provincial standard of 3 years.
- The City's intensification rate of 65% also continues to exceed the Regional target of 50%.
- Overall, planning applications have increased 25% in 2023 over 2022, and timeline targets were put into force and effect in July of 2023.

In 2023, for Zoning By-Law Amendments and Official Plan Amendments which received a decision from Council, 60% were processed within the mandated time windows specified in the *Planning Act*. For those that did not meet the imposed time standards, the most common note on the file was that multiple resubmissions delayed bringing applications to council.

Planning Application Statistics 2023

- Rezoning/Official Plan – 35
- Draft Plans of Subdivision/Condo – 5
- Site Plans – 17
- Minor Variances - 50
- Consents – 19
- Pre-Consultations – 117

BYLAW SUMMARY

- By-law services responded to 1,841 complaints which was a slight decrease from 2022 when 1,969 complaints were received.
- Property standards complaints were down 11% in 2023 (364) from 2022 (409).
- Building Code orders were down in 2023 to 104 from the 146 orders issued in 2022.

SECTION 5 BUILDING STATISTICS

| | <i>Portfolio</i> | <i>Q1</i> | <i>Q2</i> | <i>Q3</i> | <i>Q4</i> | <i>2023 Total</i> | <i>2022 Total</i> |
|------------------------------|---------------------------------|-------------------|---------------------|---------------------|-------------------|---------------------|----------------------|
| BY-LAW | <i>Condition of Yards</i> | 104 | 514 | 437 | 31 | <u>1,086</u> | <u>1178</u> |
| | <i>Downspouts</i> | 8 | 18 | 20 | 1 | <u>47</u> | <u>40</u> |
| | <i>Encumbrance</i> | 10 | 28 | 23 | 3 | <u>64</u> | <u>113</u> |
| | <i>Fence/Hedge</i> | 11 | 37 | 14 | 1 | <u>63</u> | <u>87</u> |
| | <i>Licenses</i> | 5 | 3 | 9 | 1 | <u>18</u> | <u>25</u> |
| | <i>Noise</i> | 19 | 40 | 30 | 4 | <u>93</u> | <u>112</u> |
| | <i>Other</i> | 5 | 16 | 8 | 9 | <u>38</u> | <u>101</u> |
| | <i>Signs</i> | 3 | 2 | 2 | 1 | <u>8</u> | <u>21</u> |
| | <i>Zoning</i> | 48 | 151 | 209 | 14 | <u>422</u> | <u>292</u> |
| | <i>TOTAL</i> | <u>213</u> | <u>799</u> | <u>764</u> | <u>65</u> | <u>1,841</u> | <u>1,696</u> |
| PROPERTY STANDARDS | <i>Orders issued</i> | 130 | N/A | 457 | 42 | <u>629</u> | - |
| | <i>Water supply/drainage</i> | 16 | 11 | 6 | 7 | <u>40</u> | <u>32</u> |
| | <i>Occupancy standards</i> | 13 | 11 | 18 | 10 | <u>52</u> | <u>82</u> |
| | <i>Other</i> | 16 | 16 | 27 | 21 | <u>80</u> | <u>103</u> |
| | <i>Tree Issues</i> | 3 | 10 | 13 | 6 | <u>32</u> | <u>36</u> |
| | <i>Structural/Exterior</i> | 14 | 15 | 15 | 15 | <u>59</u> | <u>68</u> |
| | <i>Lack of Heat</i> | 10 | 2 | 1 | 14 | <u>27</u> | <u>27</u> |
| | <i>Zoning/Out buildings</i> | 2 | 6 | 2 | 2 | <u>12</u> | <u>16</u> |
| | <i>Miscellaneous complaints</i> | 9 | 24 | 25 | 4 | <u>62</u> | <u>45</u> |
| | <i>TOTAL</i> | <u>83</u> | <u>95</u> | <u>107</u> | <u>79</u> | <u>364</u> | <u>409</u> |
| BUILDING CODE | <i>Orders issued</i> | 45 | 17 | 62 | 37 | <u>161</u> | <u>116</u> |
| | <i>Building w/out permit</i> | n/a (Q1) | n/a(Q2) | n/a(Q3) | 168 | <u>168</u> | <u>146</u> |
| | <i>Orders issued</i> | 28 | 3 | 30 | 43 | <u>104</u> | - |
| RODENT REBATE PROGRAM | <i>Forms given out</i> | 27 | 16 | n/a | 0 | <u>43</u> | <u>140</u> |
| | <i>Paid out</i> | 16 | 17 | 27 | 18 | <u>78</u> | <u>114</u> |
| CLERKS | <i>Calls/Counter</i> | 625 | 1,270 | 1,270 | 747 | <u>3912</u> | <u>9144</u> |
| | <i>Compliance Letters</i> | 28 | 29 | 19 | 30 | <u>106</u> | <u>165</u> |
| | <i>FOI requests</i> | 10 | 8 | 11 | 3 | <u>32</u> | <u>25</u> |
| | <i>Muzzle order appeals</i> | 1 | 0 | 1 | 0 | <u>2</u> | <u>2</u> |
| | <i>TOTAL</i> | <u>664</u> | <u>1,307</u> | <u>1,301</u> | <u>780</u> | <u>4,052</u> | <u>12,230</u> |