

BILD GTA – PUBLIC'S ATTITUDES TOWARDS HOUSING, GROWTH AND THE ENVIRONMENT

2022 REPORT

2022-04-01

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Methodology



For the poll, a sample of 1,000 residents of the Greater Toronto Area (GTA) was surveyed online via the Ipsos I-Say panel from March 11th to March 18th, 2022.

Quotas and weighting were employed to ensure that the sample's composition reflects that of the Ontario population according to census information.

The precision of online polls is measured using a credibility interval. In this case the results are considered accurate to within +/- 3.5 percentage points, 19 times out of 20, of what the results would have been had all GTA resident adults been surveyed.

Executive Summary

Housing Shortage Influences Voting Decisions

- Top issues concerning voters consist of affordability and the cost of living (46%), healthcare (36%), availability, affordability of housing (25%), the economy and jobs (22%), and lower taxes (22%).
- Six in ten Ontarians say they're certain to vote (62%) in the 2022 Ontario provincial election. Two in three of those who strongly agree we have a housing shortage (68%) and a housing affordability issue (67%) in the GTA will be certain to vote, demonstrating that the issue is a motivating one to voters.
- Majority of GTA residents agree there is a housing affordability issue in the GTA (92%) and we have a housing shortage in the GTA (84%). Residents who agree there is a GTA housing shortage have identified provincial government as the most responsible over the municipal government and building and land development industry.

Awareness of Regulatory Framework Influences Perceptions of Environmental Protection

- One-third of GTA residents (35%) agree that building a new housing community is bad for the environment. Among those who agree, their belief is that it leads to the destruction of natural land (70%), greater demand for transportation (51%), increases CO2 emissions (48%), consumes valuable natural resources (43%), is inefficient land use/urban sprawl (42%) and leads to soil erosion (38%).
- Four in five GTA residents are aware that new homes built today are far more energy efficient than those built 20 years ago (83%), and two in three are aware of government requirements for new developments mean that natural heritage, species at risk and environmental features must be protected and preserved (66%). But focus on raising awareness of less well known messages that are effective (See next bullet).
- Half are less likely to believe building homes is bad for the environment when they were made aware that by 2030, all new housing build in Canada will be required to be net zero ready (51%). Moreover, messages about land remediation and updates to the building codes are also effective.

Residents say We Need to Balance Environmental Regulation with Need to Build More Homes Quicker

- A majority of GTA residents (92%) agree that we are in the middle of a housing affordability crisis. Four in five also agree that we are in the middle of a housing shortage crisis (81%) and we must balance environmental regulation with the need to build more homes quicker (81%).
- Although 7 in 10 GTA residents are in favour of expanding municipal borders to allow for more housing to be built in the GTA, only one-quarter of GTA residents (24%) are in favour of loosening restrictions on the Greenbelt so more housing can be built.
- Two in five GTA residents (42%) believe the GTA has adequate roads and highways to meet the needs of its residents. Moreover, over three-quarters (78%) of GTA residents support the government building more highways and roads in the GTA.

Housing Shortage and Election

Current Dwelling Status

- Two in three (64%) GTA residents own a home, of which two in five (40%) own a single family and 1 in 10 own a semi or townhouse (14%) or a condo (11%). Notably, residents from the GTA 905 (46%) region are significantly more likely to own a single family home than those from the GTA 416 region (31%). Similarly, among those who own a semi or townhouse, more are from the GTA 905 (19%) than the 416 (7%). Residents from the GTA 416 region are more likely to own a condo (16%) or rent a home (42%). Only half of those under the age of 35 own a home.

Own a home – single family home **40%** ● — GTA-905 (46%) vs. GTA-416 (31%).

Own a home – semi or townhouse **14%** ● — GTA-905 (19%) vs. GTA-416 (7%).

Own a home – condo (high-rise, mid-rise, etc.) **11%** ● — GTA-416 (16%) vs. GTA-905 (7%).

Rent a home **31%** ● — GTA-416 (42%) vs. GTA-905 (22%).

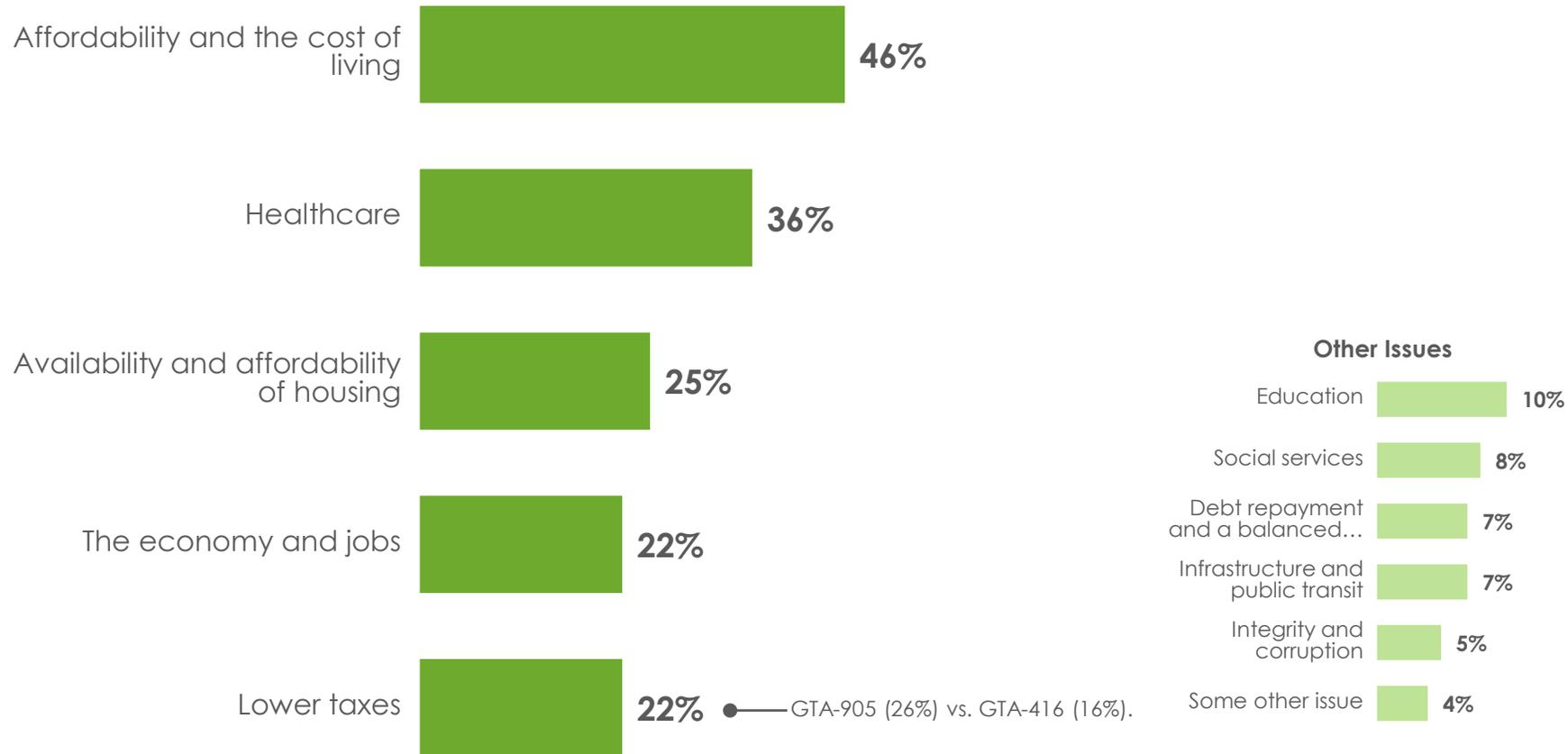
Some other arrangement **5%**



64% ● — 50% Aged 18-34
OWN A HOME

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q1. What is your current living status?

Top 5 Issues for GTA Residents



- Top issues concerning voters in the upcoming Ontario election are affordability and the cost of living (46%), healthcare (36%), availability, affordability of housing (25%), the economy and jobs (22%), and lower taxes (22%).
- Those from the GTA 905 region (26%) are significantly more likely to say that lower taxes is their top issue than those from the GTA 416 (16%). Within the GTA 905 region, Peel residents (22%) are notably less likely to rate this as their top issues compared York (29%), Durham (30%), and Halton (27%).

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)

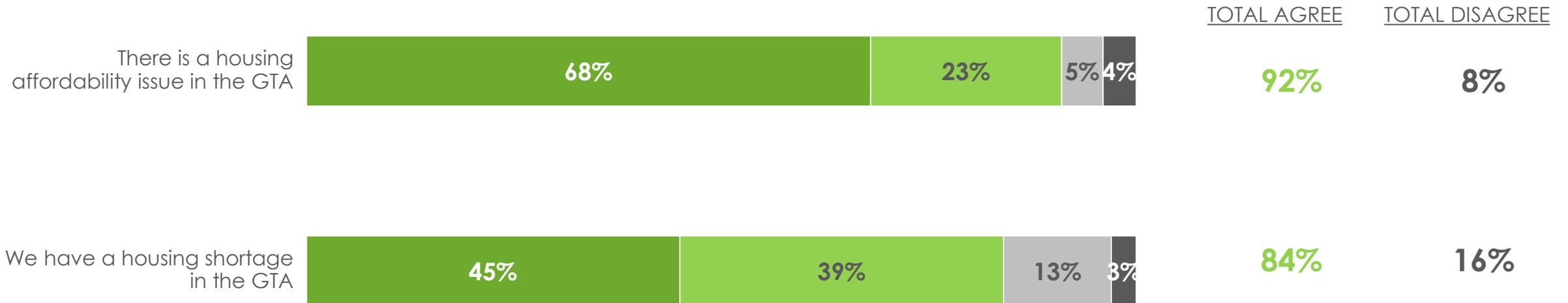
Q2. As you may know, a provincial election is being held this spring. From among the following list, what two issues are the most important in determining how you will vote on election day?

Housing Availability & Shortage

- Most GTA residents agree there is a housing affordability issue in the GTA (92% agree, 68% strongly) and we have a housing shortage in the GTA (84%, 45% strongly). Those from GTA 416 and 905 have similar levels of agreement that we have a housing shortage in the GTA (416 – 83%, 905 – 84%).

LEVEL OF AGREEMENT WITH HOUSING STATEMENTS

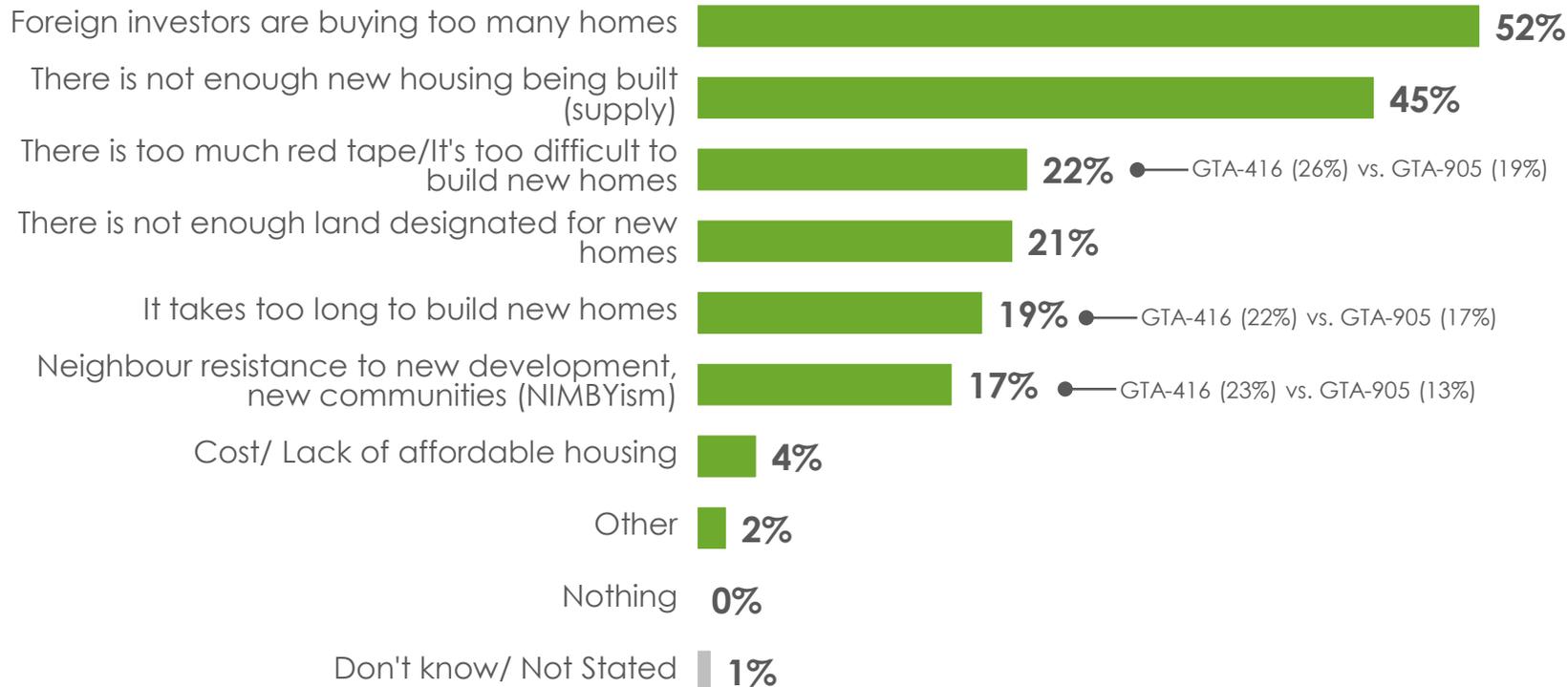
■ STRONGLY AGREE
 ■ SOMEWHAT AGREE
 ■ SOMEWHAT DISAGREE
 ■ STRONGLY DISAGREE



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q5. To what extent do you agree or disagree with the following ...

Reasons for Housing Shortage in GTA

- Among GTA residents who agree the GTA has a housing shortage issue, the most notable reasons they believe a shortage exists is because foreign investors are buying too many new homes (52%) and there is a supply issue where not enough new housing being built (45%). One in five say there is too much red tape (22%), not enough land designated for new homes (21%), it takes too long to build new homes (19%) and neighbour resistance to new development (17%). Those from the GTA 416 region are more likely to identify too much red tape, too long to build new homes and neighbour resistance as the reason to housing shortage than those from the 905 region.

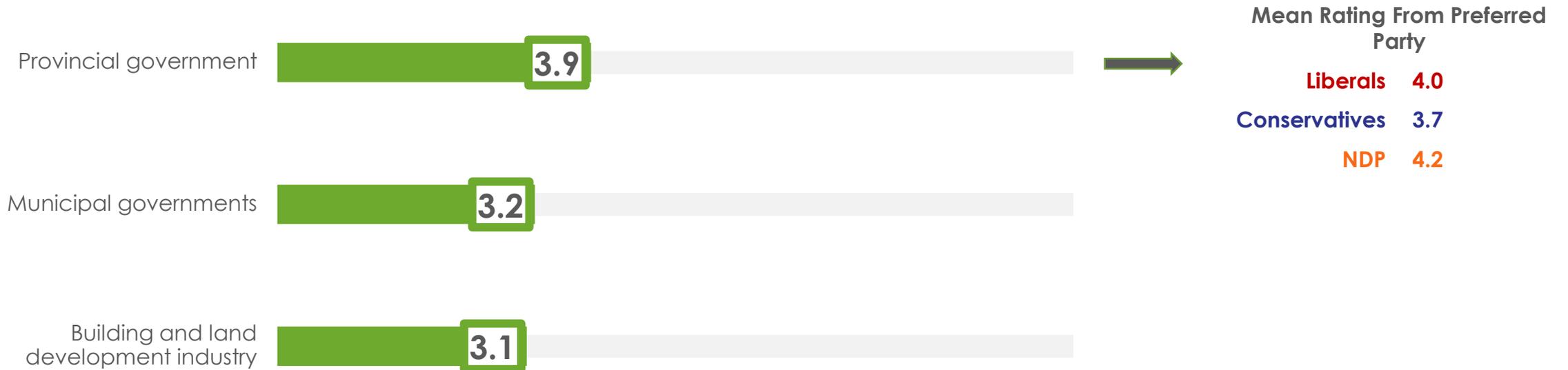


Base: Agree GTA has a housing shortage (n=829)
Q6. What do you think is the reason for the housing shortage in the GTA?

Who is Responsible for Housing Shortage

- Residents who agree there is a GTA housing shortage were provided 10 points to allocate responsibility for the housing shortage between the provincial government, municipal Government, and building and land development industry. Considering the mean for each, the provincial government was rated the most responsible amongst the three with a mean of 3.9. One-third (33%) of respondents allocated five or more points to provincial government while the municipal government (15%) and building and land development industry (18%) are less likely to be allocated five or more points. Those likely to vote for the NDP place significantly higher responsibility on the provincial government than Conservative voters.

MEAN RATING OUT OF 10



Base: Agree GTA has a housing shortage (n=829)

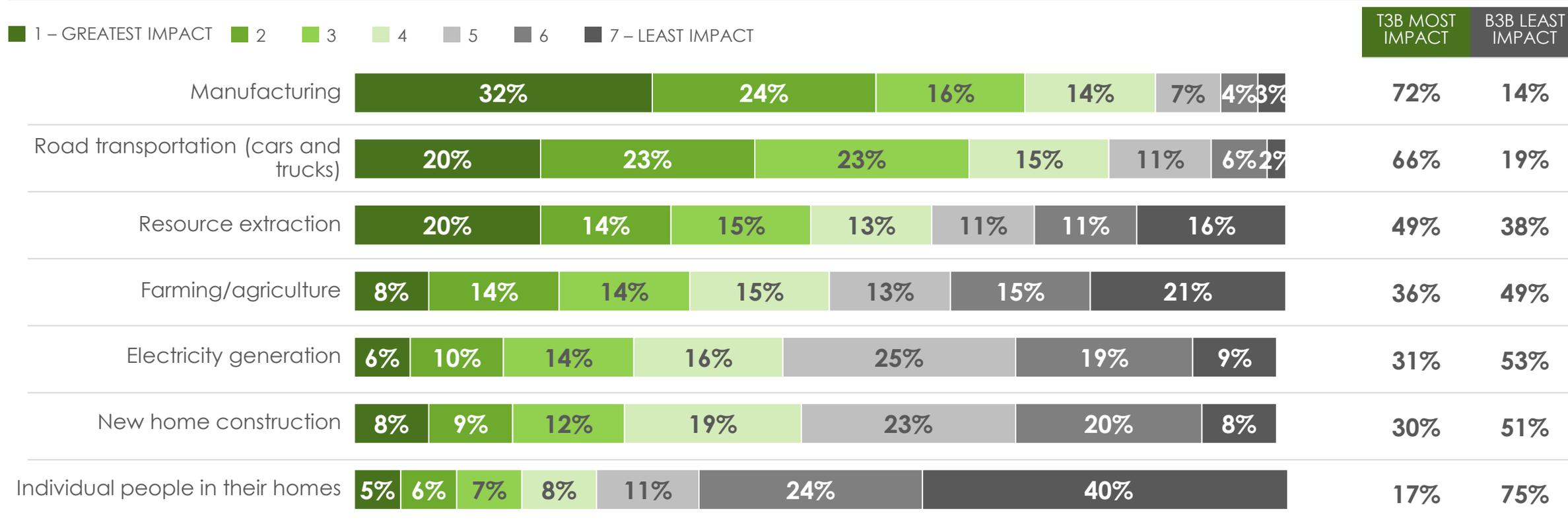
Q7. Who would you blame for the housing shortage in the GTA? You have 10 points to allocate. How would you split them up among the following ...?

An aerial photograph of a suburban neighborhood. The image shows a dense arrangement of houses with brown and grey roofs, interspersed with green trees and lawns. A network of dark asphalt roads winds through the area, including a prominent curved road that forms a large loop. The lighting suggests a bright, sunny day, with shadows cast by the trees and buildings.

Regulatory Framework and Environmental Impact

Level of Impact on the Environment

- Residents were prompted to rank the items below based on their impact on the environment, where a rating of 1 meant the item had the most impact. Manufacturing has the highest proportion of residents ranking it as the greatest impact (32%) and as the most impactful overall (72%). One in five have ranked both road transportation (20%) and resource extraction (20%) as the greatest impact, however two in three (66%) overall have ranked road transportation more impactful than resource extraction (49%). Relatively few (30%) believe that new home construction is among the top-three most impactful sectors on the environment.



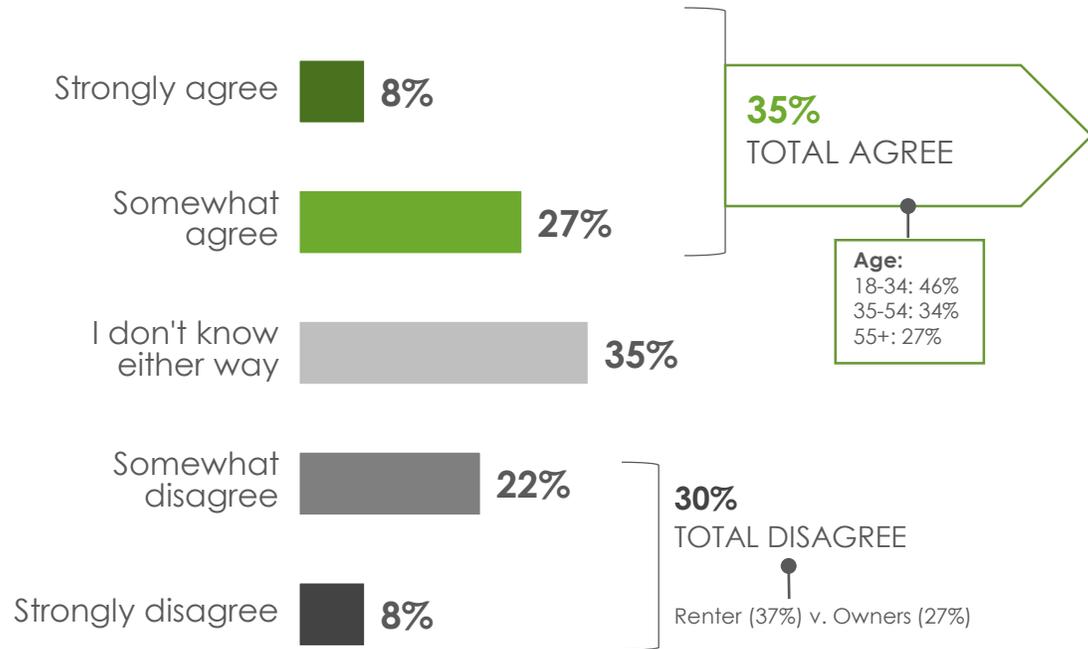
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)

Q8. Please rank the following actions in terms of the ones that have the greatest impact on the environment to having the least impact on the environment.

Perceptions of the Impacts of Building on the Environment

- One-third of GTA residents (35%) agree that building a new housing community is bad for the environment. Notably, only a quarter (24%) of respondents from the Halton region would agree with this statement, significantly lower than Peel (41%) and Durham (40%). Young adults (46%) and Liberal voters (42%) are most likely to agree; renters are most likely to disagree (37%) compared to owners (27%). Among those who agree, their reasoning consists of the destruction of natural land (70%), greater demand for transportation (51%), increases CO2 emissions (48%), consumes valuable natural resources (43%), inefficient land use/urban sprawl (42%) and soil erosion (38%).

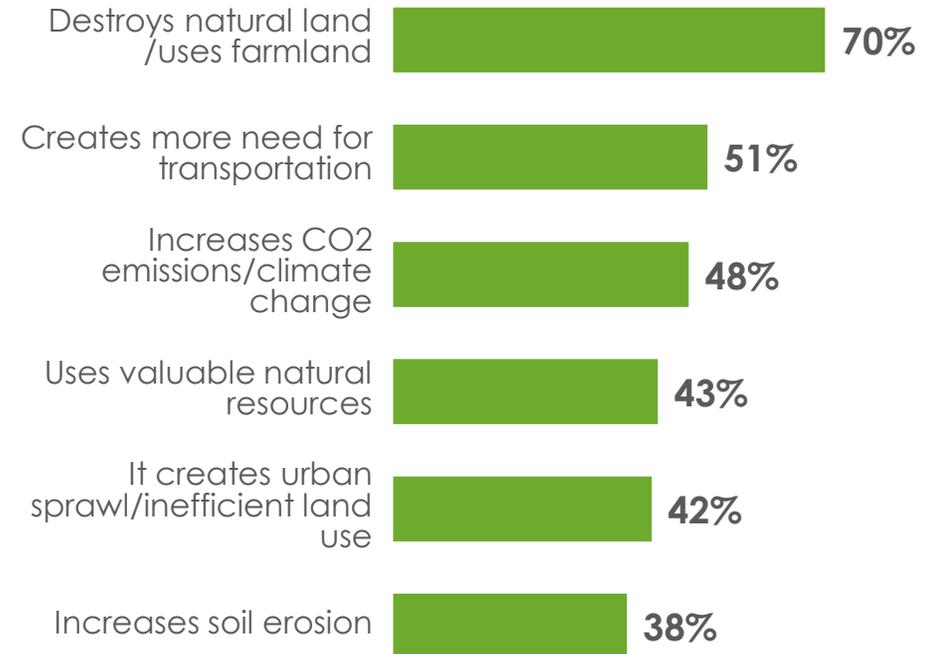
BUILDING IS BAD FOR THE ENVIRONMENT



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)

Q9. Do you agree or disagree that building a new housing community is bad for the environment?

REASONS FOR AGREEMENT



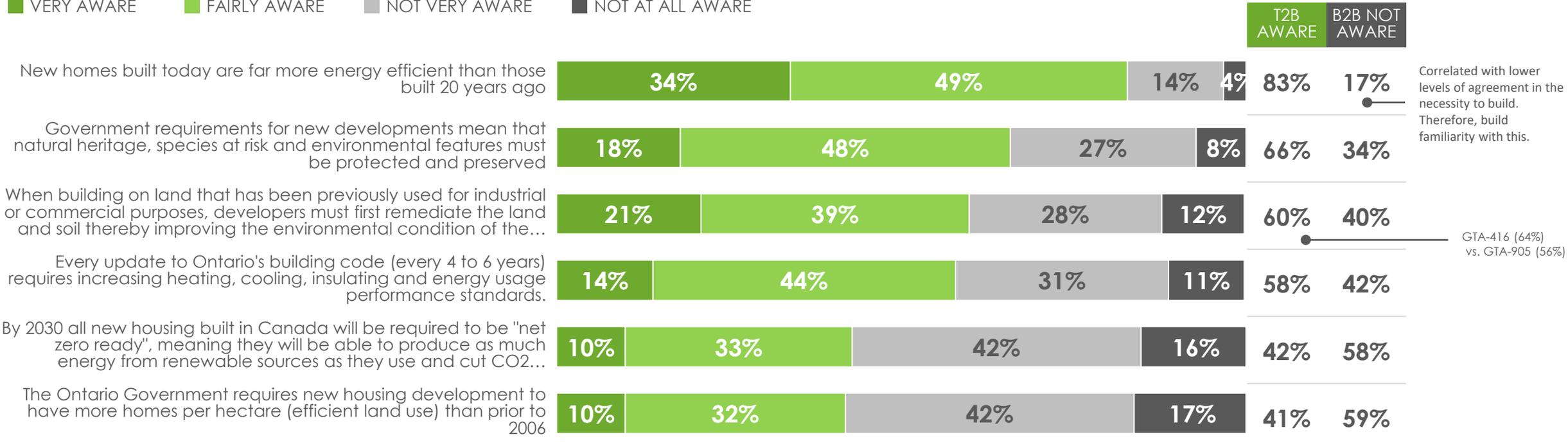
Base: Agree building a new housing community is bad for the environment (n=343)
Q10. Why do you believe that building a new housing community is bad for the environment?

Awareness of Building Specifications / Requirements

- Four in five GTA residents are aware that new homes built today are far more energy efficient than those built 20 years ago (83%) followed by two in three who are aware of government requirements for new developments mean that natural heritage, species at risk and environmental features must be protected and preserved (66%). Although three in five are aware of developers are required to remediate the land and soil after industrial or commercial use (60%), those within the GTA 416 region (64%) are significantly more likely to be aware of this than those from the 905 (56%). Only a minority (42%) are aware of the 2030 "net zero ready" requirements, or the efficient land-use policy (41%).

LEVEL OF AWARENESS

■ VERY AWARE
 ■ FAIRLY AWARE
 ■ NOT VERY AWARE
 ■ NOT AT ALL AWARE

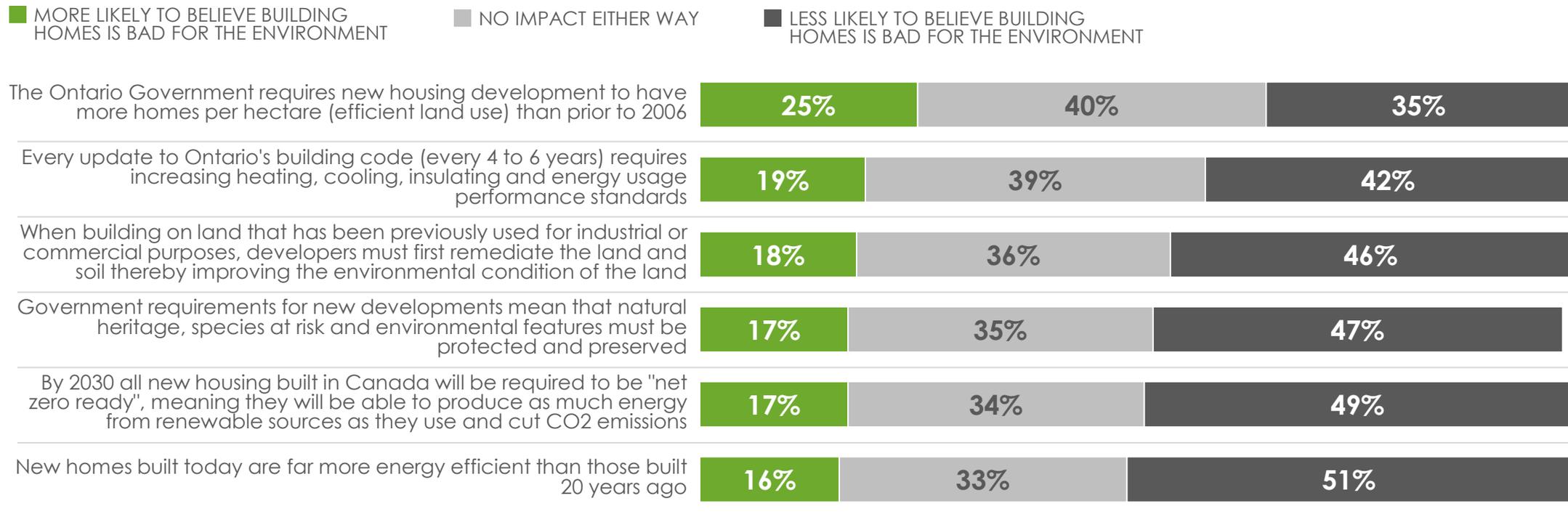


Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q11. To what extent are you aware of the following ...?

Influence of Building Specifications/Requirements

- After GTA residents were provided with the building specifications and requirements necessary in Ontario for new developments, half are less likely to believe building homes is bad for the environment when they were made aware that by 2030, all new housing built in Canada will be required to be net zero ready (49%) and new homes built today are far more energy efficient than those built 20 years ago (51%). After being made aware that the Ontario Government requires new housing development to have more homes per hectare, a quarter of GTA residents are more likely to believe this is bad for the environment, while only 35% are less likely, making this not an appealing proof point.

BUILDING HOMES IS BAD FOR THE ENVIRONMENT



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q13. To what extent does knowing these things make you more or less likely to believe that **building homes is bad for the environment**?

Influence of Building Specifications/Requirements

- The key is to raise awareness of the arguments that resonate the most – notably the 2030 net-zero ready requirement, updates to the building code, and land remediation.

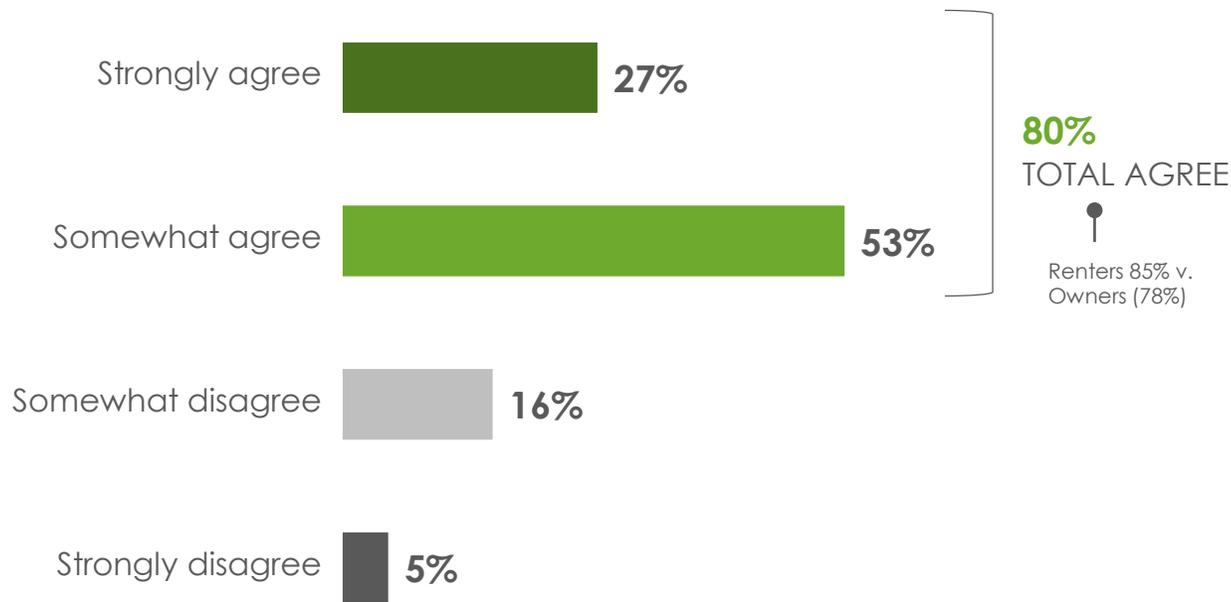
BUILDING HOMES IS BAD FOR THE ENVIRONMENT



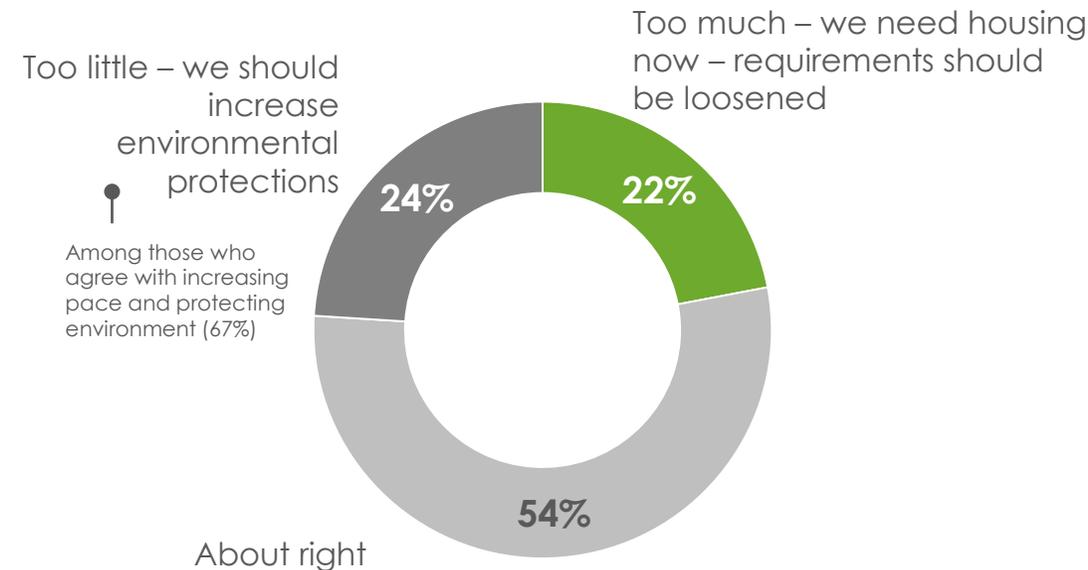
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q12. To what extent does knowing these things make you more or less likely to believe that **building homes is bad for the environment**?

Increasing Pace of Development Without Compromising Sustainability

- Overall, four in five GTA residents agree it is possible to increase the pace of home development while being able to take appropriate measures to protect the environment. Notably, one-third of those from Peel region (34%) strongly agree with this statement and are significantly more likely to agree overall (83%) compared to those in Durham region (72%). Renters (85%) are also more likely than owners (78%) to agree that it's possible.
- Although majority of GTA residents agree the pace of development can be increased without compromising sustainability, GTA residents are split on amongst those who state we have too little environmental protection (24%) and those who believe there is too much and requirements should be loosened (22%).



Environmental Requirements for New Homes



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q14. Do you agree or disagree with the following ... it is possible to increase the pace of home development while at the same taking appropriate measures to protect the environment.

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q17. Understanding that environmental requirements add costs to new homes and slow the addition of new supply, do you think the environmental requirements for new homes are ...?

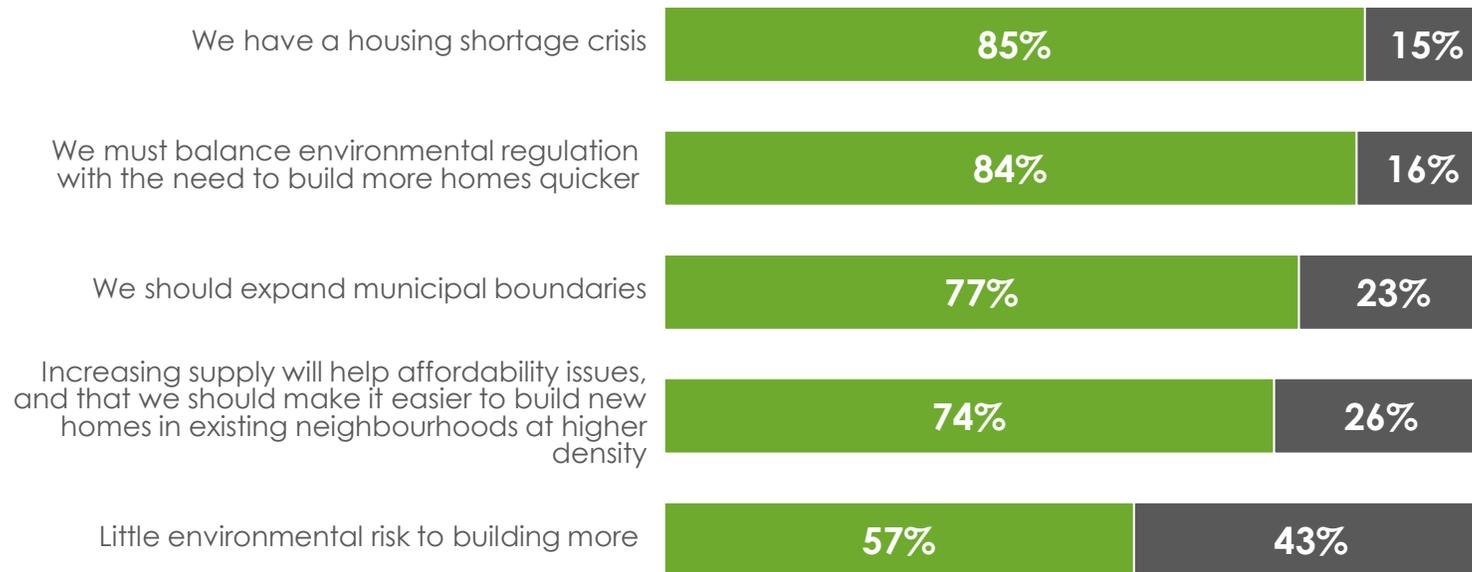
Increasing Pace of Development Without Compromising Sustainability cont.

- Among those who agree it is possible to increase the pace of home development are much more likely to say we have a housing shortage crisis (85%), we should expand municipal boundaries (77%), increasing supply will help with affordability issues and we should make it easier to build new homes in existing neighbourhoods (74%), there is little environmental risk to building more (57%), and we must balance environmental regulation with the demand for homes (84%).

Among those who agree it is possible to increase the pace while protecting the environment

■ AGREE ■ DISAGREE

80%
TOTAL AGREE →



Increasing Pace of Development Without Compromising Sustainability cont.

- Those who are likely to agree with the possibility to increase the pace of development while taking appropriate measures to protect the environment are more likely to be younger Canadians, within the peel region, Conservative Party voters, and are renters. The perspectives of the people who agree with this statement is they are more likely to be unaware that building on previously industrial or commercial lands requires remediation of the land and soil, are likely to agree regulations are too much or about right, agree there is a housing shortage crisis, identified affordability and availability as top voting issues, and they disagree that building new homes is bad for the environment. They are also more likely to be familiar with the industry, but most importantly, they trust the industry.

Agree it is Possible to Increase Pace while Protecting the Environment

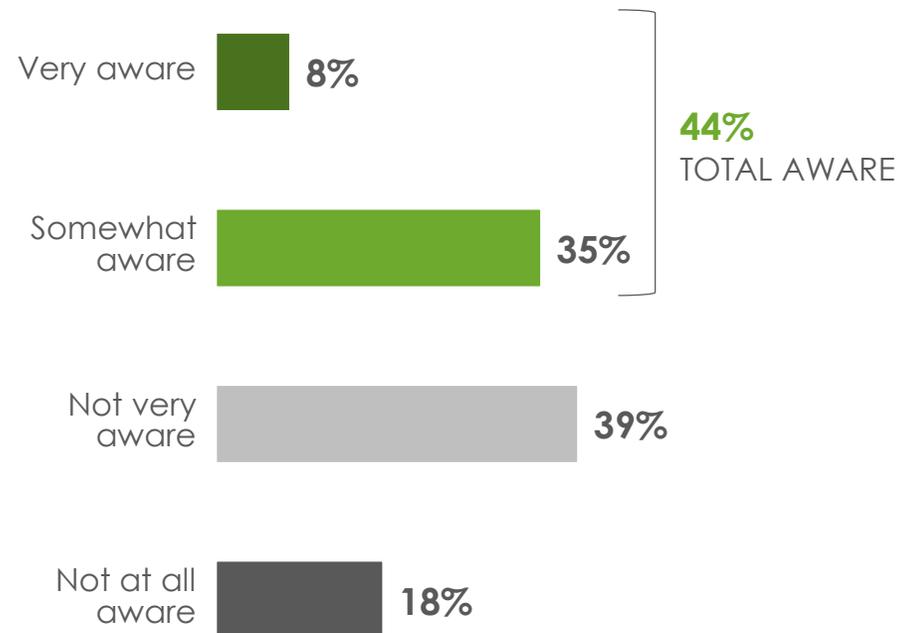
Among those who agree regulations is too much	83%
Among those who agree regulations is about right	84%
Among renters	85%
Among those who agree there is a housing shortage in GTA	85%
Among younger Canadians (18-34)	84%
Among those familiar with Industry	86%
Among those who trust the Industry	95%
Among those who live in Peel Region	83%
Among those who identified housing affordability and availability as top election issues	85%
Among Conservative Party voters	84%
Among those who disagree that building new homes is bad for the environment	90%

Awareness of Regulatory Framework

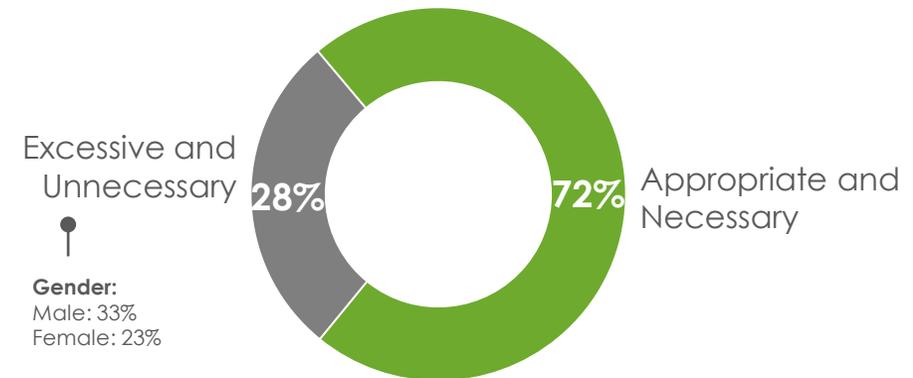
- Slightly less than half of GTA residents are aware of the listed regulatory framework which governs the environmental aspect of building new homes (44%). Notably, over half of those who mentioned they are planning to vote for the Liberal Party in the upcoming Ontario provincial election are aware of these legislations and policies (54%).
- 7 in 10 GTA residents agree that the level of regulation is appropriate and necessary (72%). Within the GTA 905 region, a greater proportion of residents from Halton (84%) say these regulations are necessary and appropriate than those living in Peel (67%).

The environmental aspect of building new homes is governed by the following provincial legislation and policy:

- Provincial Policy Statement (covering housing, development and planning related matters)
- Environment Protection Act
- Environmental Assessment Act
- Endangered Species Act
- Conservation Authorities Act
- Ontario Heritage Act
- The Greenbelt Act
- A Place to Grow Act
- The Planning Act
- The Building Code Act



Appropriateness of Regulation Level



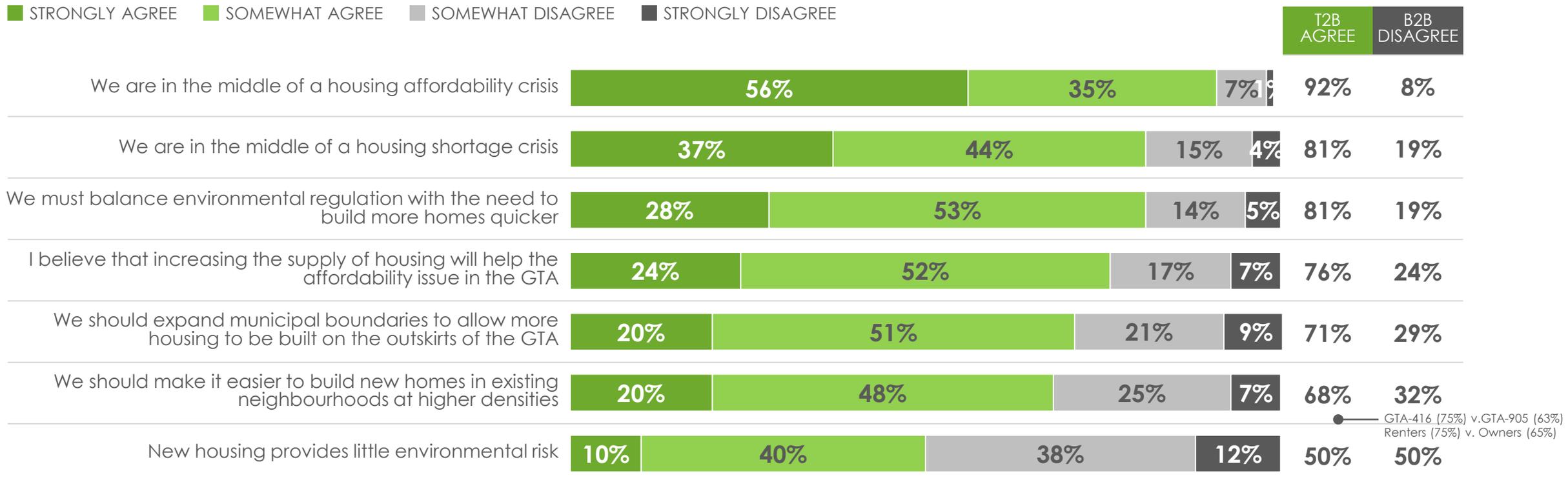
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q15. Before today, how aware were you of the regulatory framework which governs the environmental aspect of building new homes?

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q16. The environmental regulations which govern the building of new homes typically add tens of thousands in costs and significant time to the building of new homes. Do you believe that this level regulation is appropriate and necessary, or do you think it is excessive and unnecessary?

Housing Barriers, Support & Needs

Housing Barriers & Issues

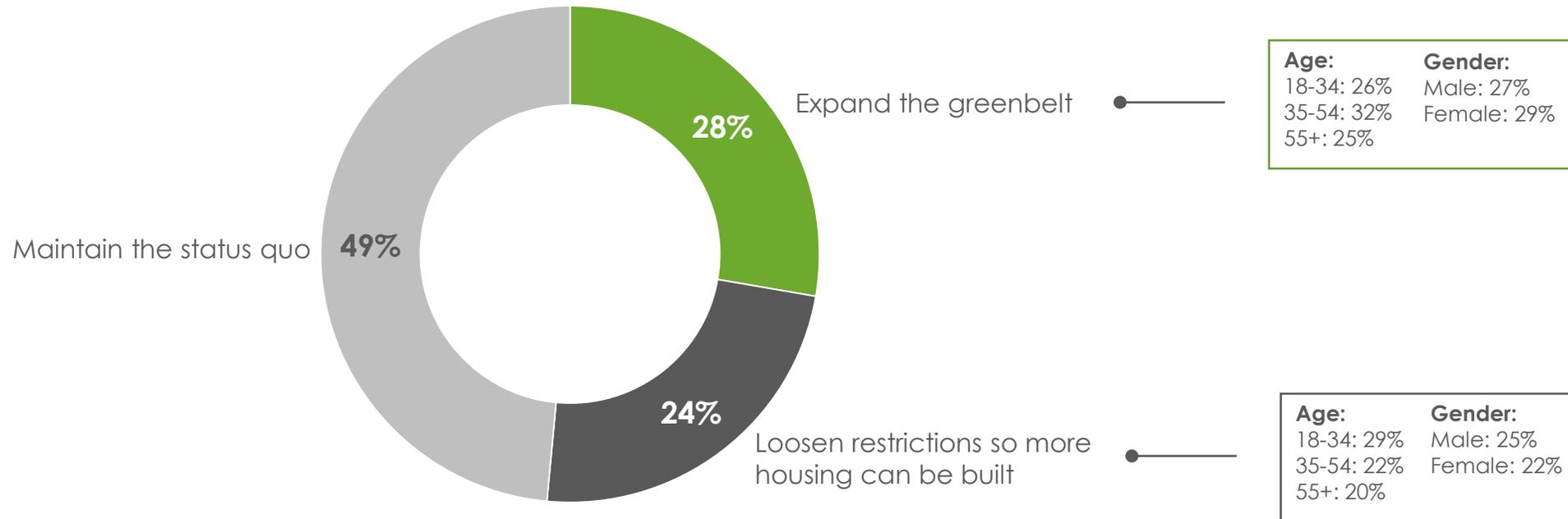
- 9 in 10 GTA residents (92%) agree that we are in the middle of a housing affordability crisis (56% strongly, 35% somewhat). Four in five also agree that we are in the middle of a housing shortage crisis (81%) and we must balance environmental regulation with the need to build more homes quicker (81%). Slightly fewer, but still a large proportion, believe that increasing supply will help with the affordability issue (76%) and more housing should be built on the outskirts of the GTA (71%). Notably, focusing on the two-thirds (68%) of respondents who agree we should make it easier to build new homes in existing neighbourhoods, three-quarters (75%) from the 416 region agree as opposed to only 63% agreeing from the 905 region. Renters (75%) are also more likely than owners (65%) to agree that we should make it easier to build new homes in existing neighbourhoods.



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q18. To what extent do you agree with the following statements ...?

Perceptions on the Greenbelt

- Although 7 in 10 GTA residents are in favour of expanding municipal borders to allow for more housing to be built in the GTA, only one-quarter of GTA residents (24%) are in favour of loosening restrictions on the Greenbelt so more housing can be built. Overall, approximately three-quarters of residents do not want to develop on the Greenbelt by expressing their opinions to maintain the current status quo (49%) or even expanding the Greenbelt (28%). Notably, younger GTA residents, aged 18 to 34, are significantly more likely to be in favour of loosening restrictions around the green belt compared to those aged 55+.



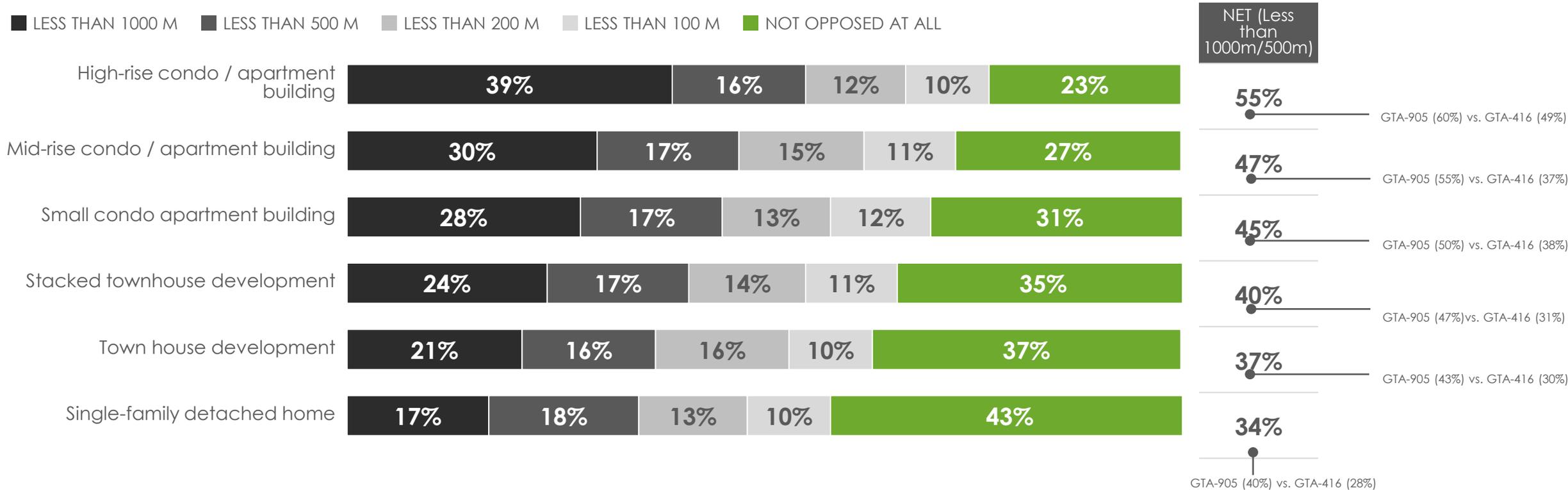
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)

Q19. The Greenbelt is an area of protected green space, farmland, forests, wetlands and watersheds which surrounds much of the GTA. With the present housing shortage, what should the province do with the Greenbelt?

Minimum Distance of New Construction

- The larger the building, and the closer it is to one's home, the more visceral the opposition. While four in ten (43%) are not at all opposed to construction of a single family home close to them, only 23% feel the same about a high-rise condo/apartment building. In fact, 55% would oppose a high-rise condo or apartment being built less than 500m away from them, but opposition drops to 45% when talking about a smaller condo apartment building, for instance.

LESS THAN 1000 M
 LESS THAN 500 M
 LESS THAN 200 M
 LESS THAN 100 M
 NOT OPPOSED AT ALL

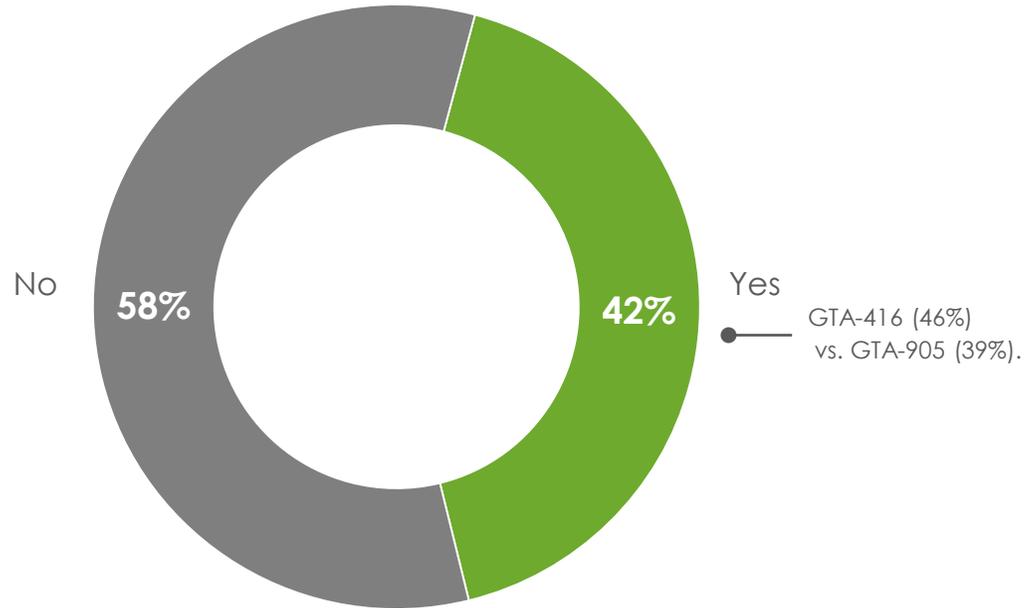


Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
 Q20. When it comes to new housing developments, at what distance from your current residence would you oppose new construction of each type of residence, if at all?

Support for more Highways and Roads

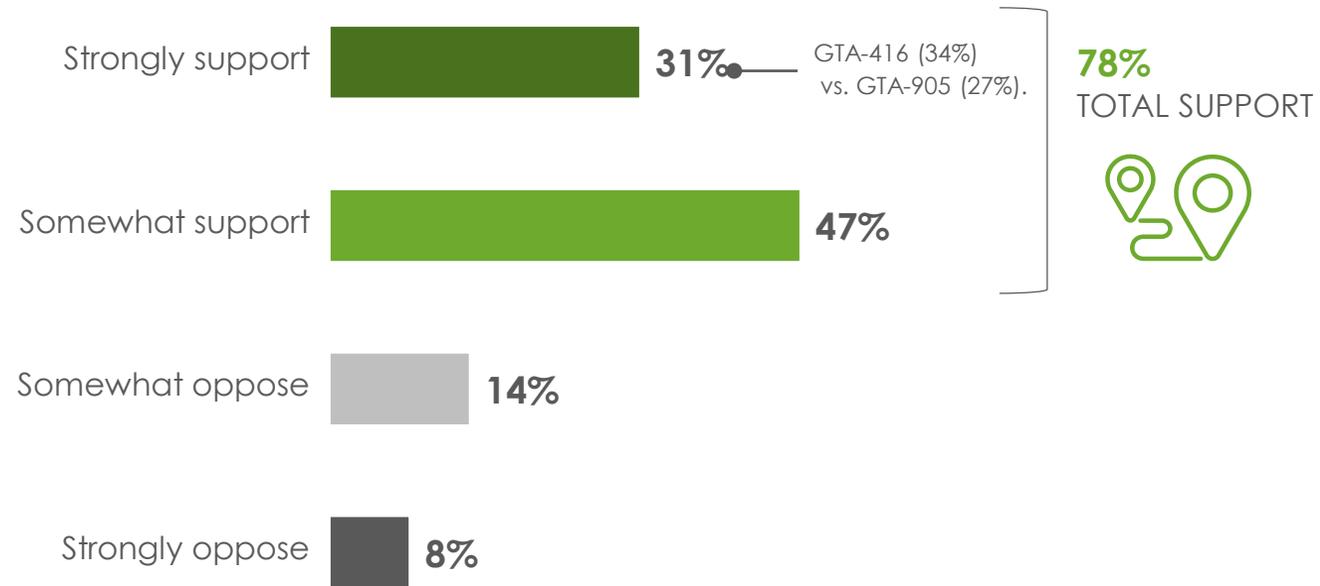
- Two in five GTA residents (42%) believe we have adequate roads and highways to meet the needs of their residents. Those within the GTA 416 region (46%) are more likely to say yes than those from the GTA 905 (39%). This is likely due to greater transit options within the 416 compared to the 905.
- With less than half of residents saying they have adequate roads and highways to meet their needs, over three-quarters (78%) of GTA residents support the government building more highways and roads in the GTA. With support so strong, a consensus is emerging.

Do we have adequate roads?



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560)
 Q22. The Greater Toronto Area is one of the fastest growing regions in North America. Do you believe we have adequate roads and highways to meet the needs of residents?

Support for Government Building More Highways and Roads



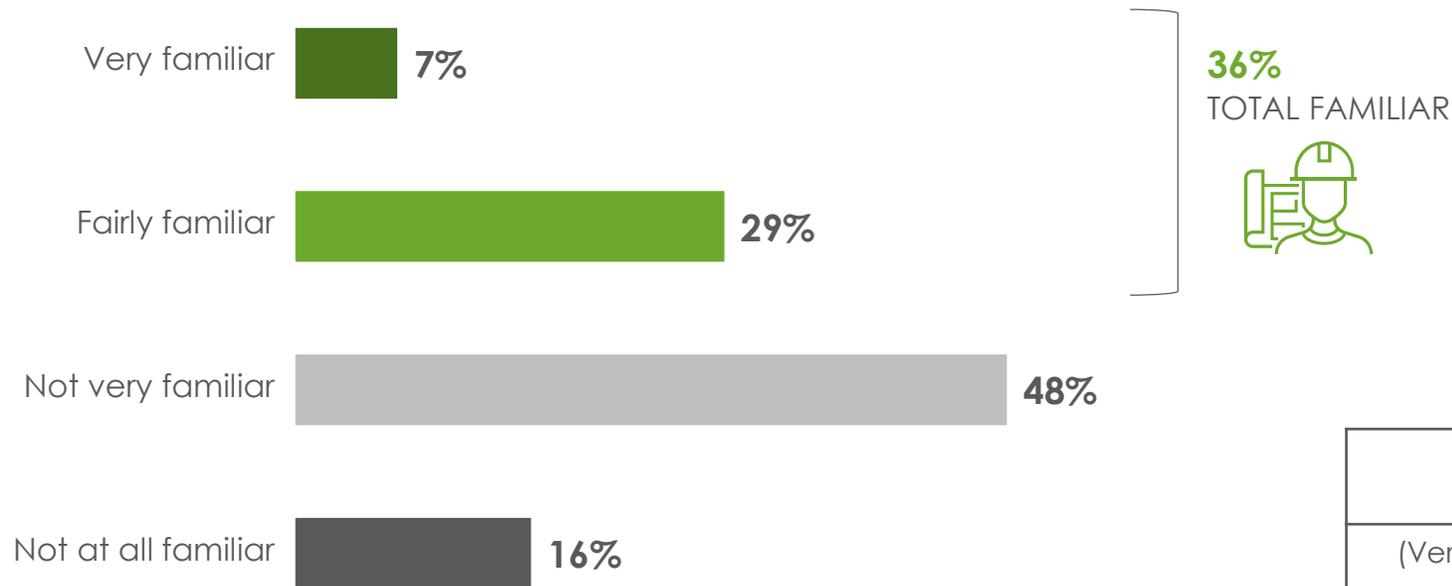
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560)
 Q22_1. Do you support or oppose the government building more highways and roads in the GTA to make it easier for residents to get around?



Attitudes Towards the Industry

Familiarity with Residential Land Development and Home Building Industry

- One in three GTA residents (36%) are familiar with the residential land development and home building industry. This is equal between those from the GTA 416 and 905 region, however, only a quarter (25%) of residents of Halton are familiar which is notably lower than Peel (38%), York (35%), and Durham (40%). Familiarity has declined 2 points since the Fall of 2020.



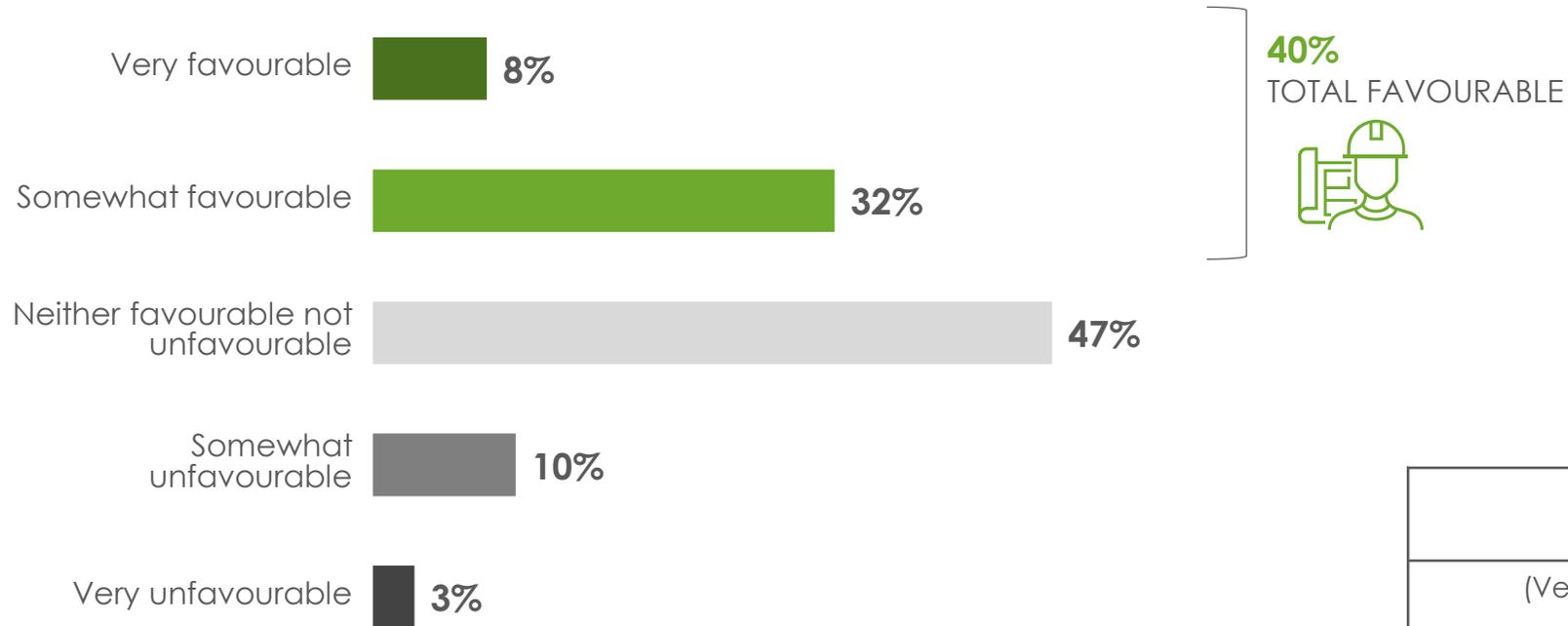
36%
TOTAL FAMILIAR

	Mar 2022	Fall 2020
(Very/fairly familiar)	36%	38%
(Not at all/not very familiar)	64%	62%

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q23. How familiar would you say you are with the residential land development and home building industry?

Favourability with Residential Land Development and Home Building Industry

- Two in five GTA residents (40%) are favourable towards the residential land development and home building industry. Similar to familiarity, both GTA 416 and 905 have two in five (40%) who are favourable. Notably, within the 905 region, those in Peel (48%) are significantly more likely to be in favour than those in Durham (32%) and Halton (33%). Since 2018 (the last time we asked favourability), there has been a significant improvement in favourability (+8 pts), while the proportion who are unfavourable has declined by 15 points.

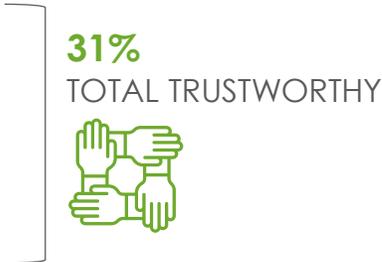
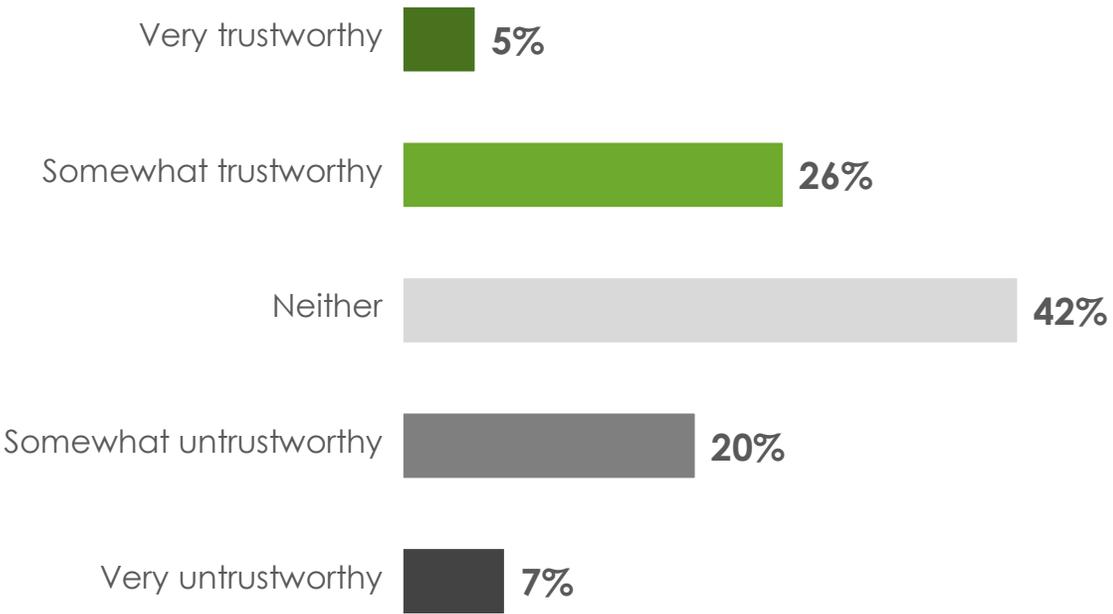


	Mar 2022	2018
(Very/somewhat favourable)	40%	32%
(Very/somewhat unfavourable)	13%	28%

Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68) Q24. Overall, how favourable are you towards the residential land development and home building industry?

Trustworthiness of Residential Land Development and Home Building Industry

• 3 in 10 GTA residents find the residential land development and home building industry trustworthy. Residents of Peel (37%) are significantly more likely to see this industry as trustworthy than those in York (25%) and Durham (20%). Furthermore, those who are likely to vote for the Liberal party (40%) and the Conservatives (36%) are significantly more likely to see this industry as trustworthy than those who are likely to vote for the NDP (26%). Trust has fallen slightly (4 points) since the Fall of 2020.

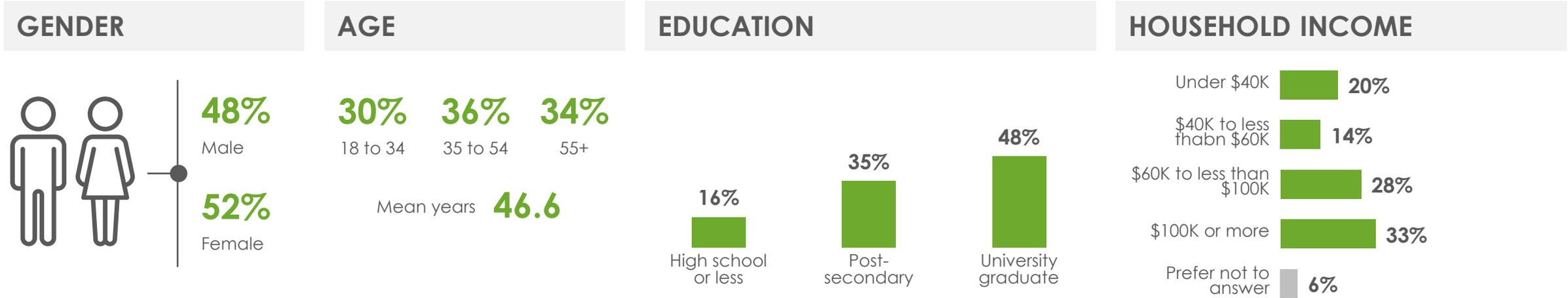


	Mar 2022	Fall 2020
(Very/somewhat trustworthy)	31%	35%
(Very/somewhat untrustworthy)	27%	23%

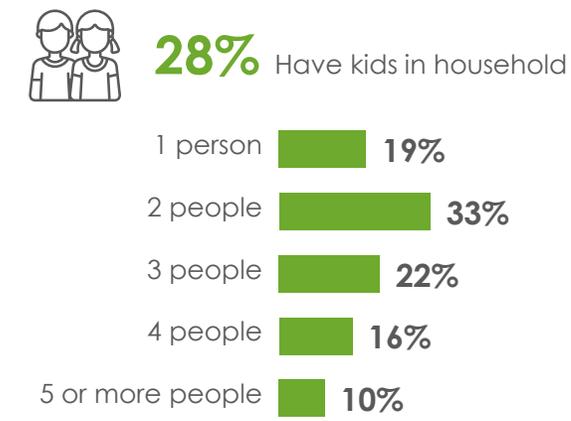
Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)
Q25. How trustworthy do you find the residential land development and home building industry?

DEMOGRAPHICS

Demographics

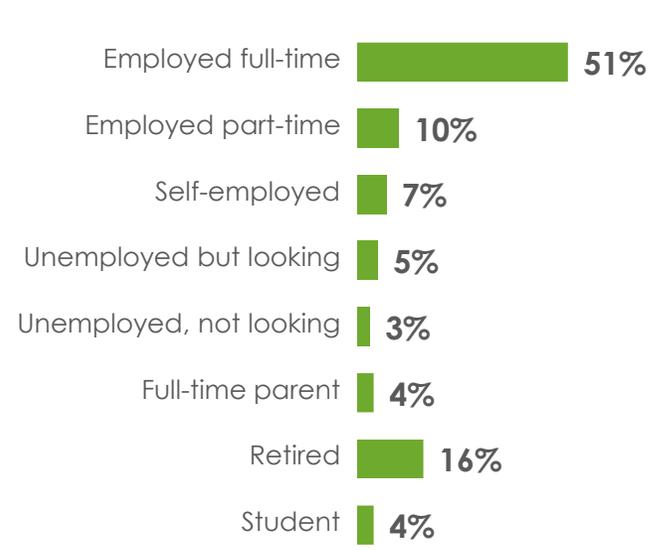


HOUSEHOLD COMPOSITION

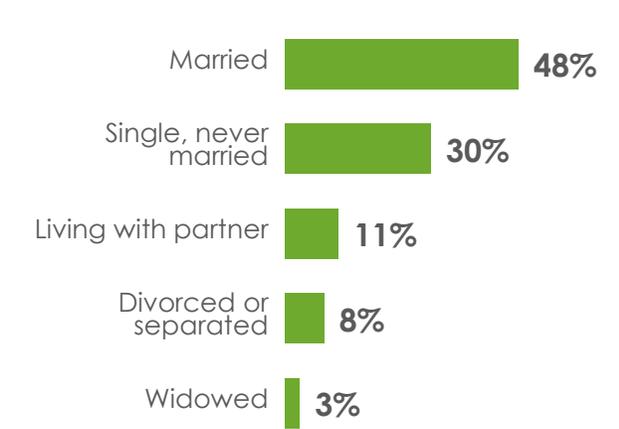


Base: All respondents (n=1000)

EMPLOYMENT STATUS

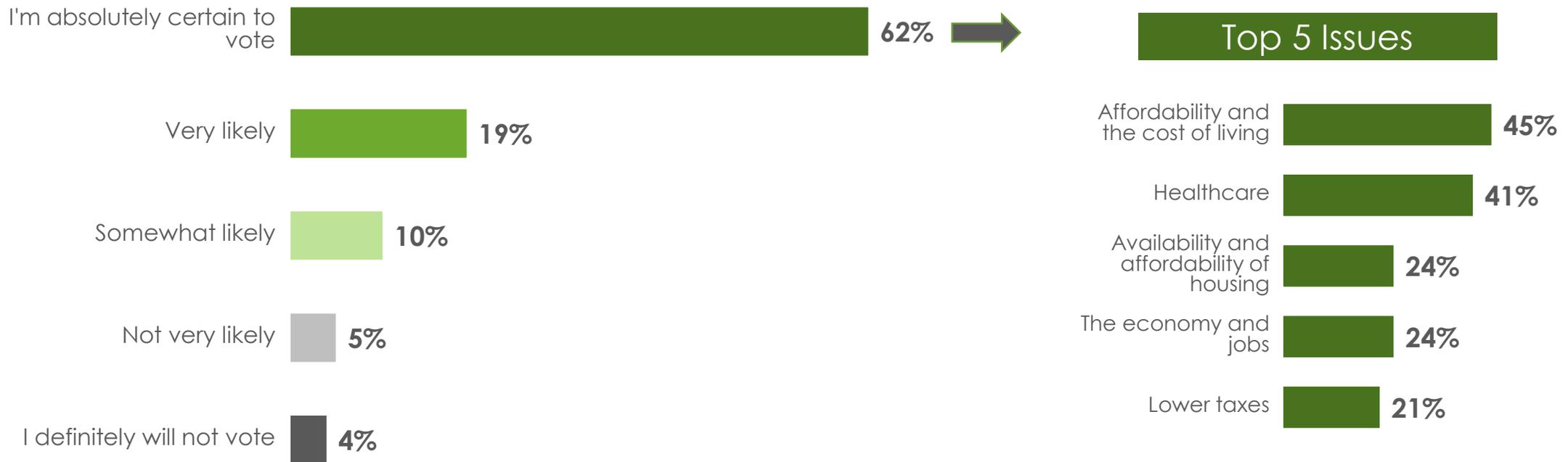


MARITAL STATUS



Likelihood of Voting in Upcoming Provincial Election

- Three in five (62%) of GTA residents will certainly vote in the 2022 Ontario provincial election. Within the GTA 905 region, residents from Peel (57%) and York (60%) are significantly less likely to be absolutely certain to vote in comparison to those in Durham (76%) and Halton (75%). Two in three of those who strongly agree we have a housing shortage (68%) and a housing affordability issue (67%) in the GTA will be certain to vote, demonstrating how these issues are driving voters to the ballot boxes. Among all of those certain to vote, housing is tied as the third most-important issue.



Base: All respondents (n=1000)
 Q3. How likely are you to vote in the upcoming Ontario provincial election this spring?

Appendix

Influence of Building Specifications/Requirements

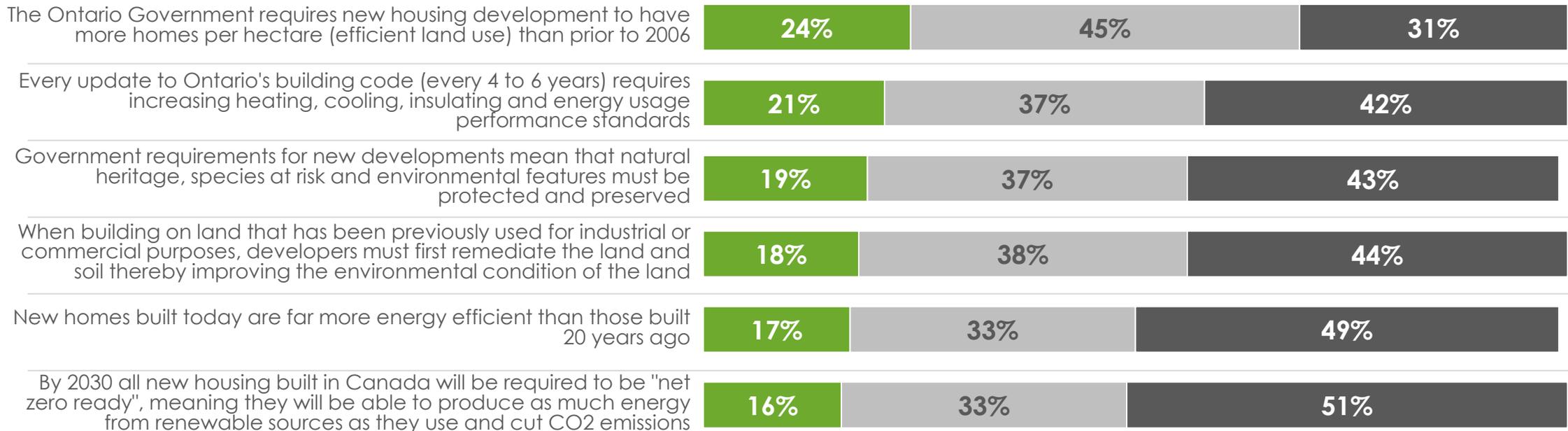
- After being made aware of the building specifications and requirements necessary in Ontario, GTA residents were provided with a rephrased question whether these requirements make them more or less likely to believe building homes is bad for the environment. There is relatively no change in comparison to when residents were prompted with the environment is being adequately protected when new housing is being built.

THE ENVIRONMENT IS BEING ADEQUATELY PROTECTED WHEN NEW HOUSING IS BEING BUILT

■ MORE LIKELY TO BELIEVE BUILDING HOMES IS BAD FOR THE ENVIRONMENT

■ NO IMPACT EITHER WAY

■ LESS LIKELY TO BELIEVE BUILDING HOMES IS BAD FOR THE ENVIRONMENT



Base: All respondents (n=1000) GTA 416 (n=440), GTA 905 (n=560); Peel (n=173), York (n=123), Durham (n=99), Halton (n=68)

Q12. To what extent does knowing these things make you more or less likely to believe that **the environment is being adequately protected when new housing is being built?**

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You act better when you are sure.