

Halifax Regional Municipality's **2012 Citizen Survey** Key Findings

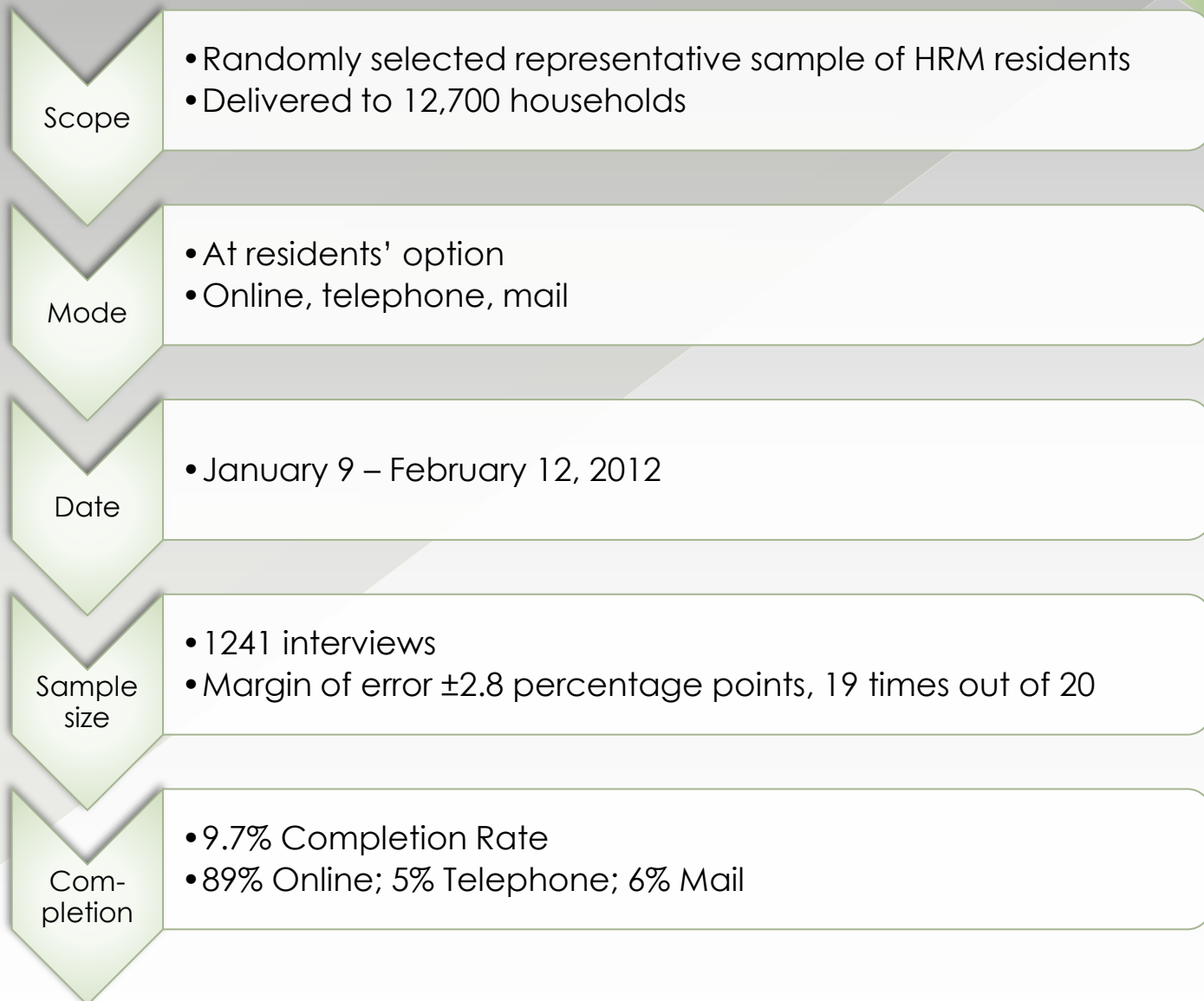
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Nova Insights
Market Research & Consulting

HALIFAX
REGIONAL MUNICIPALITY

Methodology



What We'll Cover Today

Public Opinion on ...

- Quality of Life
- Broad Priorities
- Taxes and Service Levels
- Public Safety
- Infrastructure
- Planning/Growth

Highlights of Survey Findings

- Council direction is aligned with Citizen Priorities
 - *Transit*
 - *Maintenance vs. New (infrastructure)*
- Residents are overwhelmingly satisfied with the quality of life
- Most respondents say they receive very “good” or “somewhat good” value for taxes
- 78% of respondents are okay with the same level of taxes or a small increase in taxes / services
- 81% feel completely or very safe in their neighbourhood
- 86% feel completely or very safe where they work and shop
- Citizens have confidence that police will respond promptly in an emergency

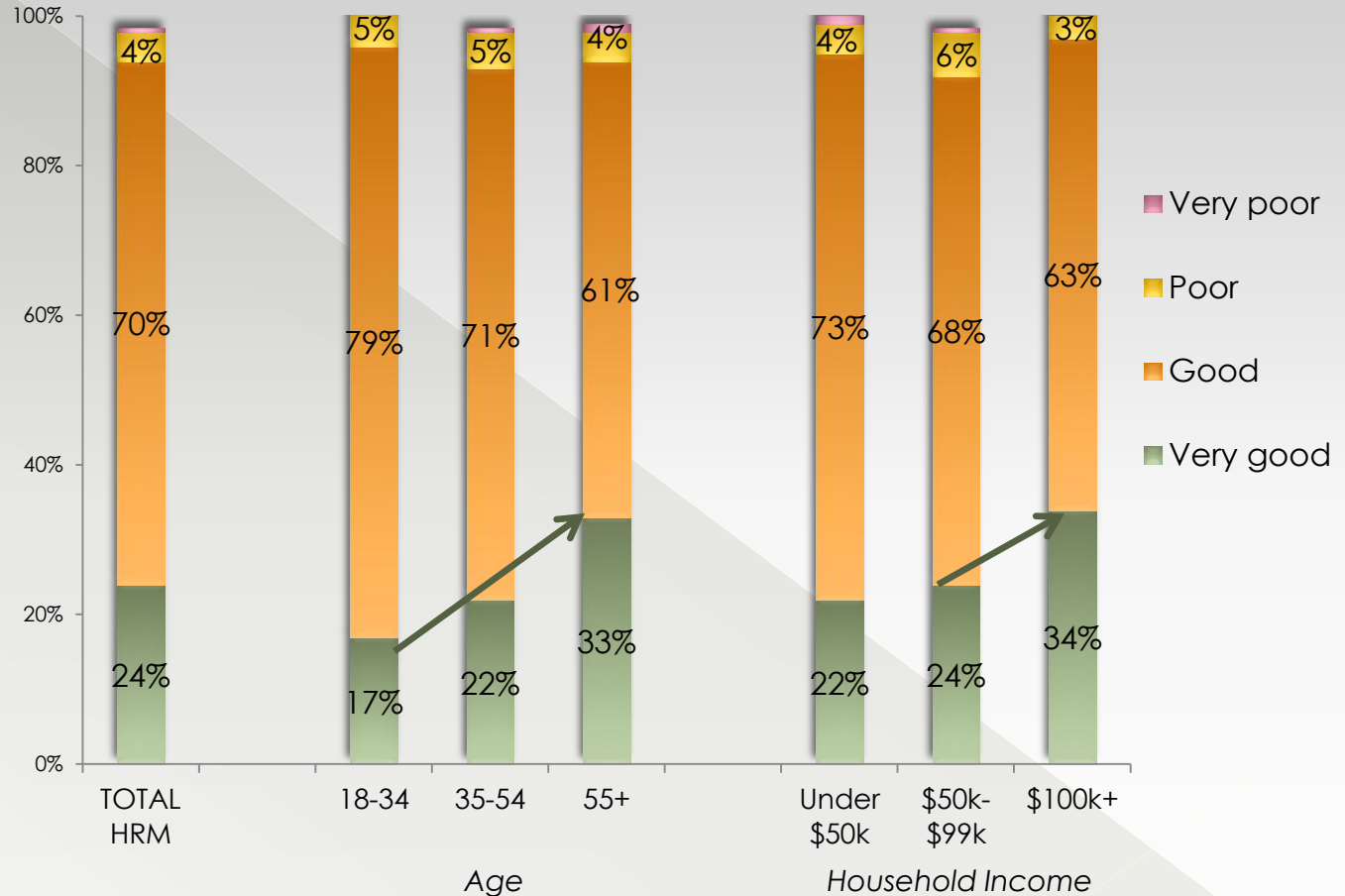
Quality of Life and Broad Priorities

- Overall Quality of Life
- Change in Perception of Quality of Life
 - Top of Mind Issues
 - Broad Priorities
- Economic Development Priorities

Key Findings

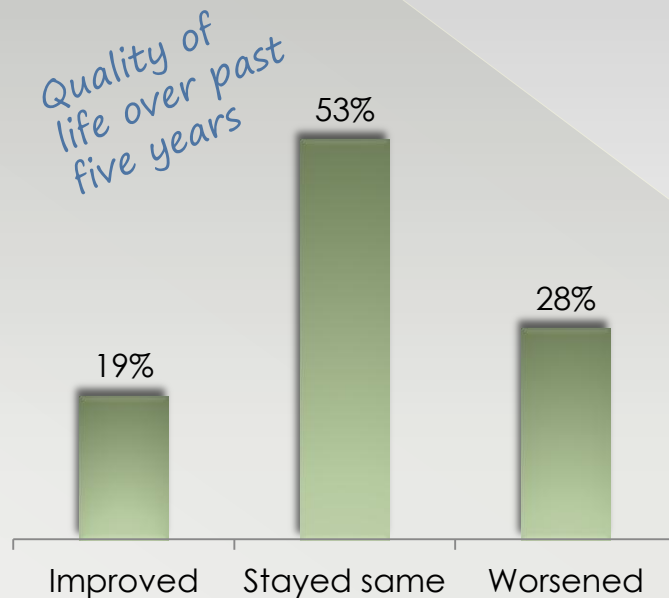
There is almost unanimity in the belief that the quality of life in HRM is “good” or “very good.”

Quality of life rating



Key Findings

72% of respondents believe the quality of life has stayed the same or improved over the past five years.



How HRM could improve Quality of Life:

- ~ Transit (38%)
- ~ Lower taxes (25%)
- ~ Social issues (22%)
- ~ Public safety (18%)

Key Findings

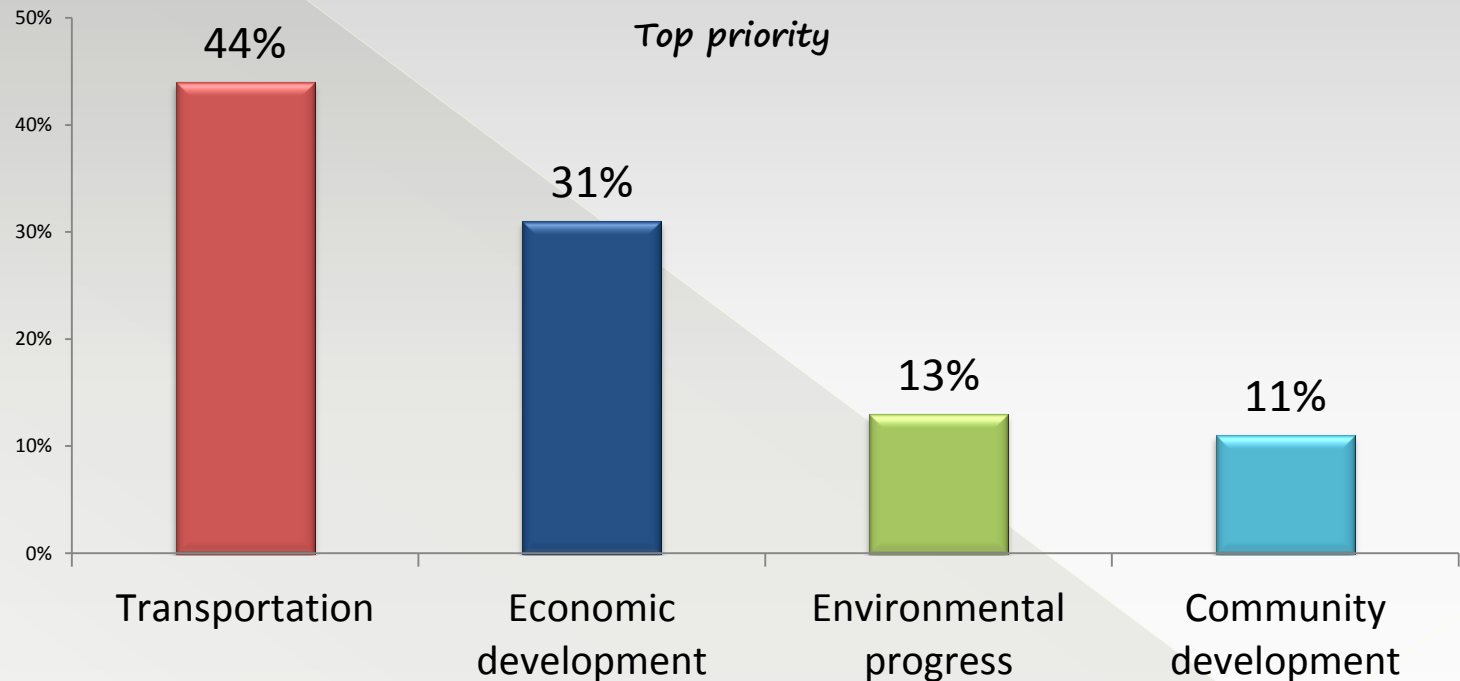
Transit service investments and expansion consistently shows up as a priority for residents.

It starts with top-of-mind issues

| | | AGE | | | |
|---|-----------|-------|-------|-----|------|
| Top issues facing HRM over next 5 years | TOTAL HRM | 18-34 | 35-54 | 55+ | 2010 |
| Transit service | 26% | 34% | 24% | 23% | 24% |
| Public Safety | 22% | 18% | 23% | 23% | 20% |
| Environment | 19% | 27% | 15% | 17% | 6% |
| Transportation issues | 18% | 18% | 21% | 16% | 14% |
| Economy / Employment | 18% | 27% | 17% | 10% | 7% |
| Downtown – Redevelop/Revitalize | 17% | 15% | 18% | 19% | 8% |
| Taxation | 15% | 9% | 18% | 18% | 23% |
| Roads and streets | 12% | 8% | 16% | 12% | 15% |
| Infrastructure | 11% | 7% | 13% | 11% | 13% |

Key Findings

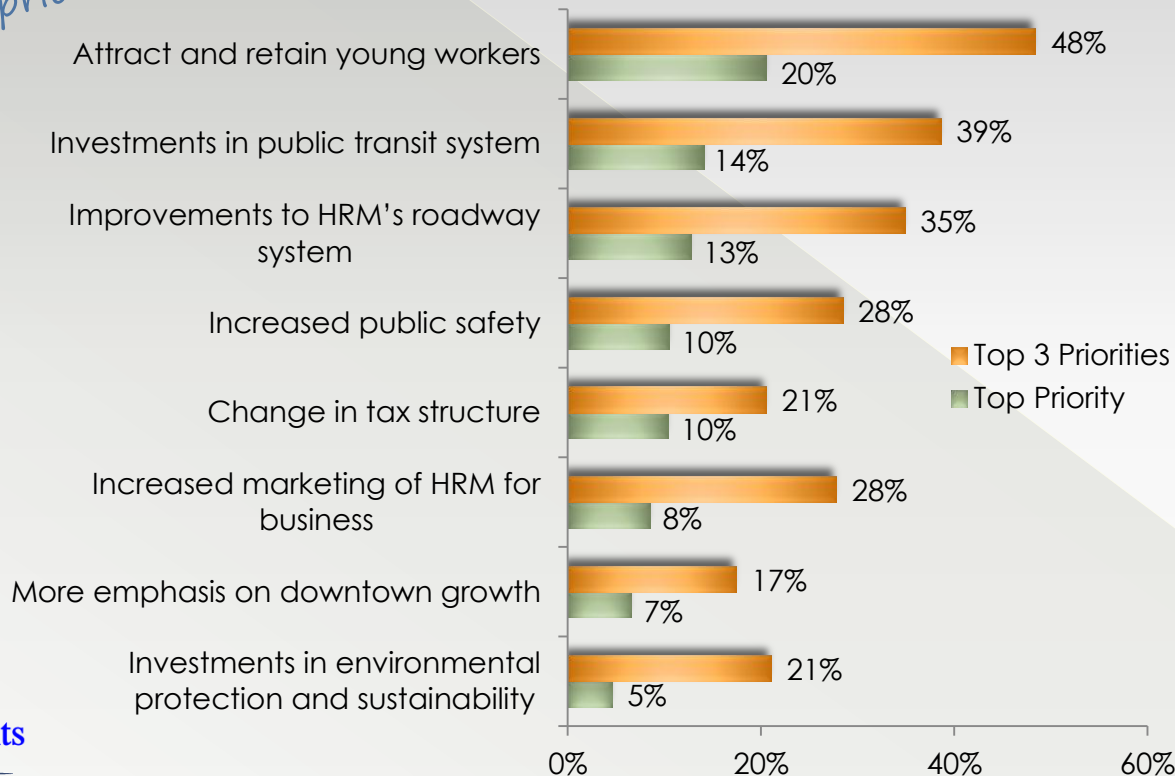
Transportation tops the broad priorities, followed by economic development, environmental progress, and community development.



Key Findings

The highest spending priorities for economic development are for increased efforts to attract and retain young workers and investments in the public transit system.

Economic development spending priorities



Of 'lesser' importance:

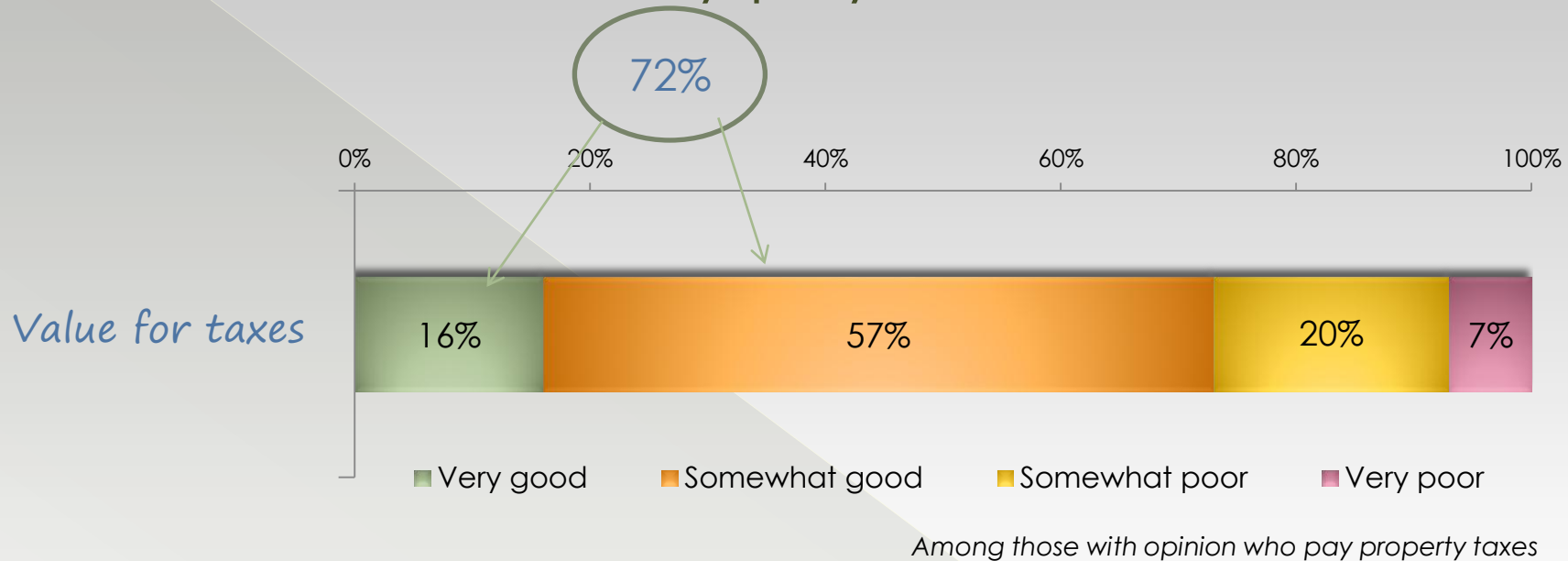
- Increased efforts to attract new residents (2%/9%)
- More emphasis on arts and culture (2%/9%)
- Beautification of the Municipality (2%/10%)

Taxes and Service Levels

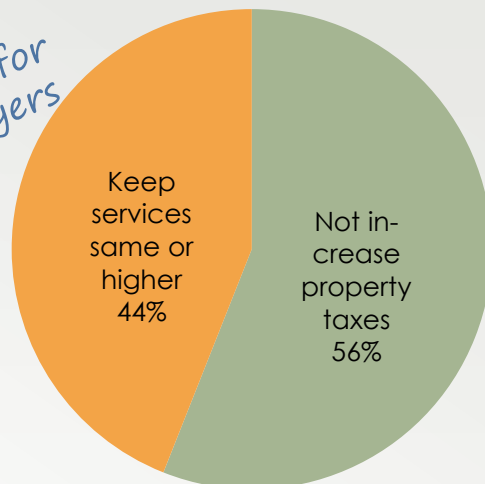
- Value for Taxes
- Tax and Service Levels
- Spending on Services

Key Findings

More than seven-in-ten perceive “somewhat” or “very” good value for the taxes they pay.



Choice for taxpayers

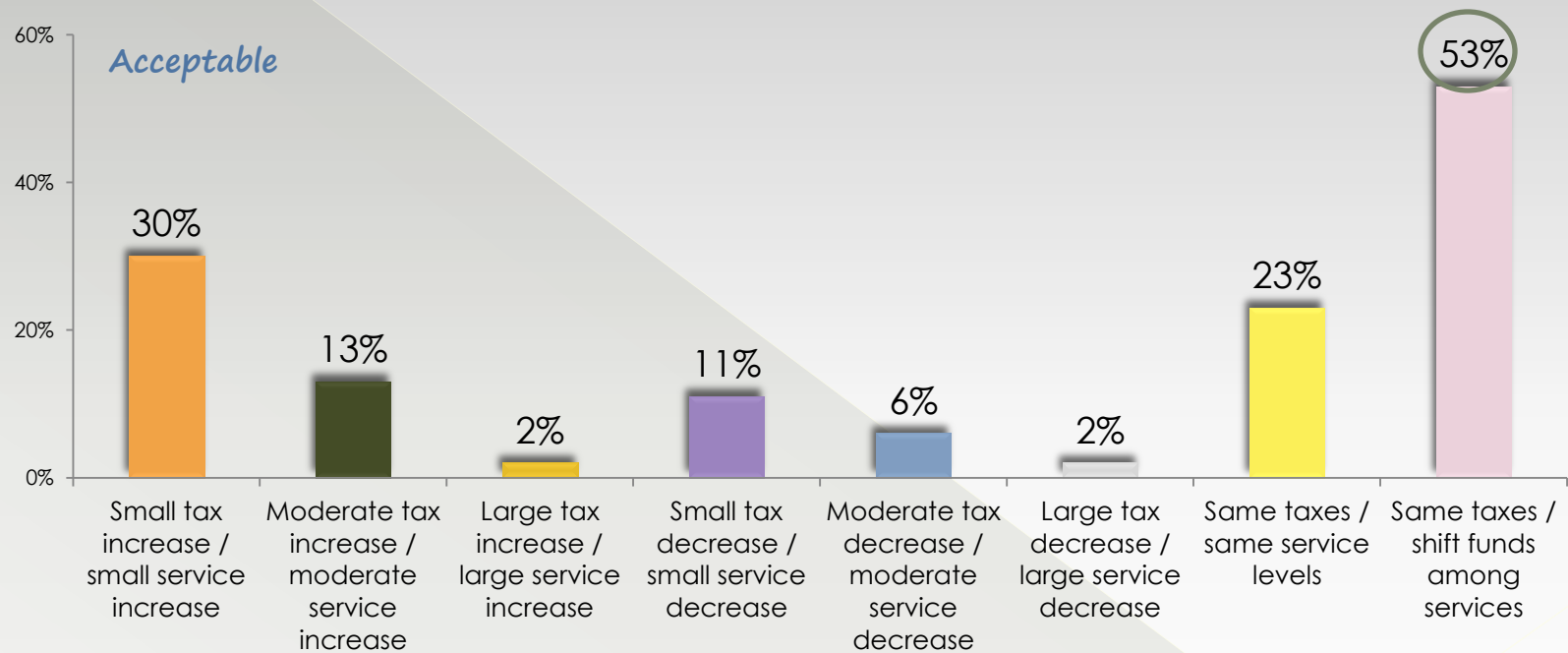


Changes for better value for taxes?

- ~ Improved transit (11%)
- ~ Lower taxes (9%)
- ~ Improved roads (9%)
- ~ Timely snow removal (7%)
- ~ Better run municipality (6%)

Key Findings

A majority of citizens prefer to have taxes remain the same, but redistribute priorities within the services provided.



Key Findings

Among the highest “votes” for increased spending, public transit service is the only one with a majority.

| Increase Service | Increase | Maintain | Reduce / Eliminate |
|---|----------|----------|--------------------|
| Public transit service | 58% | 37% | 5% |
| Police protection and patrols | 38% | 59% | 3% |
| Ongoing regular street maintenance (e.g. repaving / pothole filling) | 34% | 62% | 3% |
| Recycling programs | 33% | 61% | 6% |
| Economic development | 31% | 55% | 13% |
| Major street improvement projects (e.g. reconstruction / traffic safety measures) | 28% | 62% | 10% |
| Snow and ice removal | 28% | 67% | 5% |
| Environmental protection and management | 26% | 62% | 12% |
| Cleanliness and litter control | 25% | 65% | 10% |

Key Findings

The highest “votes” for reduction in services fall below the proportions who would like them maintained.

| Reduce Service | Increase | Maintain | Reduce / Eliminate |
|---|----------|----------|--------------------|
| Parking enforcement | 5% | 49% | 46% |
| By-law enforcement | 11% | 57% | 32% |
| Communications / Public affairs | 8% | 59% | 32% |
| Animal control services | 7% | 60% | 32% |
| Community grants | 14% | 54% | 31% |
| Graffiti removal | 13% | 56% | 31% |
| Publicly supervised beaches | 6% | 64% | 30% |
| Arts and cultural programming | 16% | 54% | 29% |
| Festivals and community events | 13% | 58% | 29% |
| Community beautification (e.g. landscaping / floral displays) | 14% | 58% | 27% |

Public Safety

- Satisfaction with Police Services
- Confidence in Emergency Responsiveness
 - Perceptions of Safety

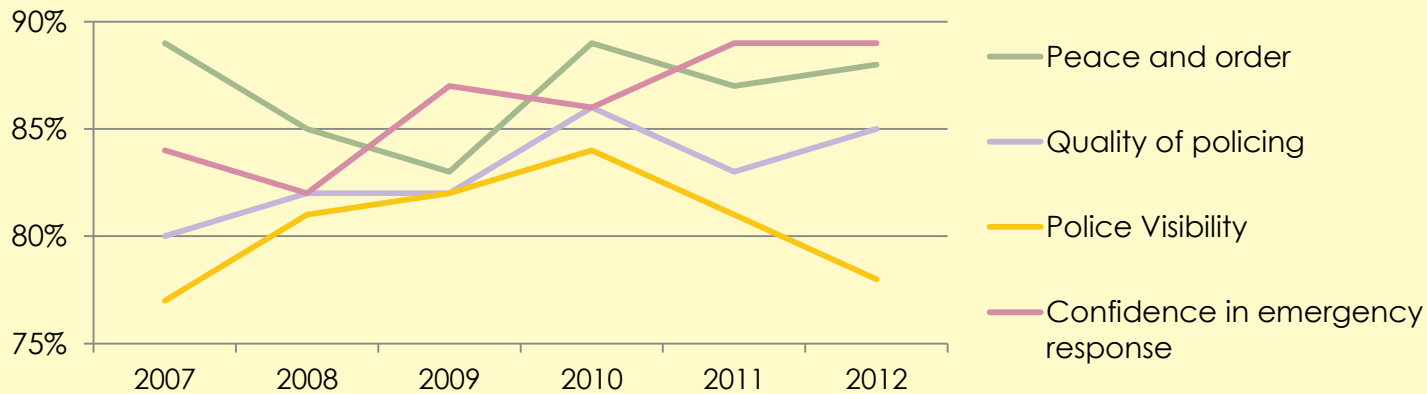
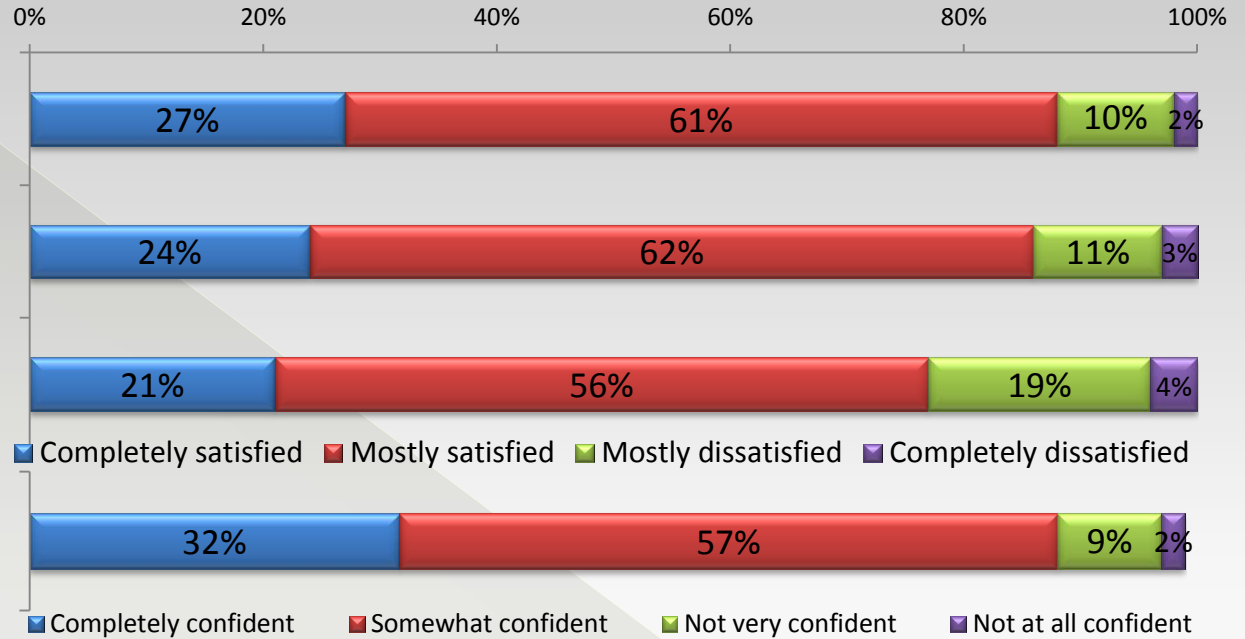
Key Findings

A very strong proportion of citizens feel at least “mostly” satisfied with peace and order in their neighbourhood.

Satisfaction

Confidence

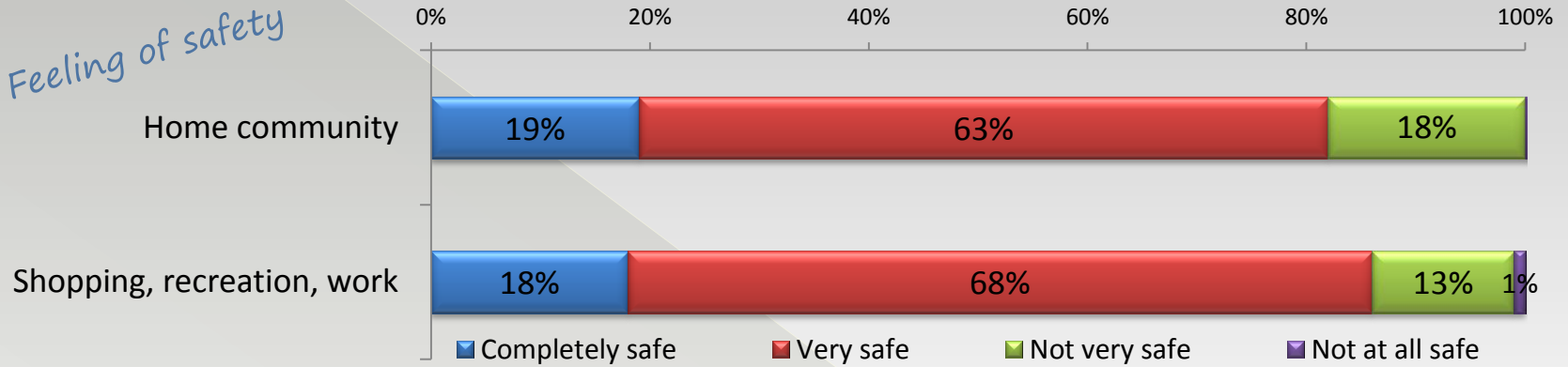
TREND - Satisfied / Confident



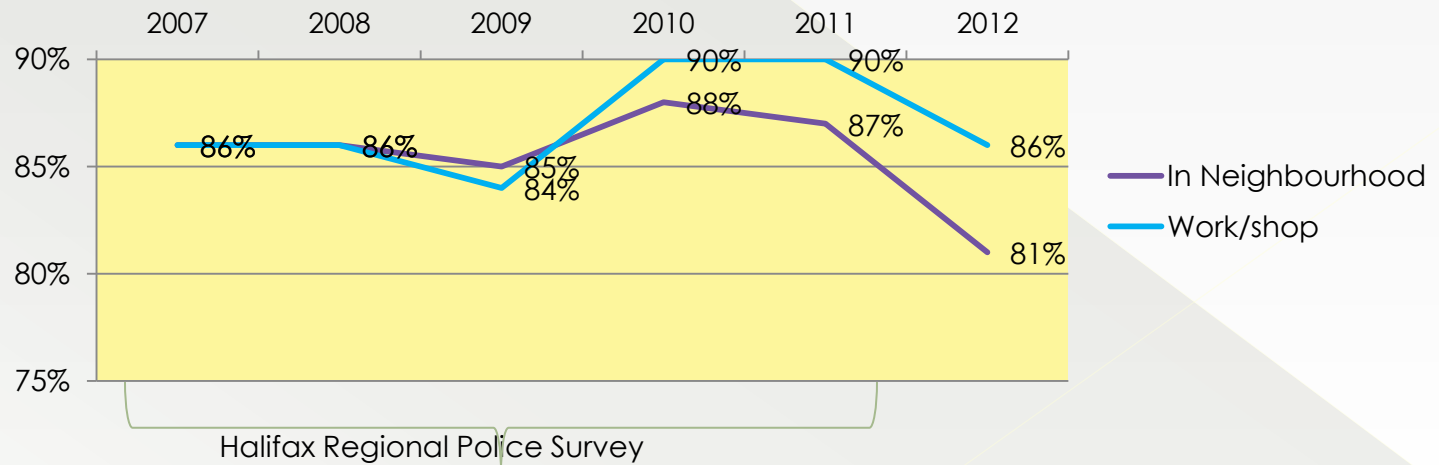
Key Findings

Similar proportions feel safe in their neighbourhoods and where they shop.

Feeling of safety



TREND - Feeling safe



Infrastructure

- Transportation
 - Community
- Environmental
- Overall Priorities

Key Findings

Maintaining existing streets and roads and upgrades to major roadways are the highest transportation infrastructure priorities.

Transportation infrastructure spending priorities

| Spending priority ↓ | TOTAL HRM | AGE | | |
|--|-----------|-------|-------|-----|
| | | 18-34 | 35-54 | 55+ |
| Maintain existing streets and roads | 21% | 16% | 21% | 25% |
| Upgrade major roadways to provide increased capacity (e.g. road widening, reversing lanes) | 16% | 15% | 17% | 17% |
| Active transportation improvements (e.g. trails, sidewalks, bike lanes) | 15% | 23% | 13% | 10% |
| More buses so that service can be expanded to new areas | 14% | 8% | 17% | 16% |
| Improved / additional public transit facilities | 14% | 12% | 14% | 15% |
| More buses on existing routes | 10% | 15% | 9% | 5% |
| Expand the harbour ferry service | 3% | 1% | 4% | 4% |
| Maintenance of existing sidewalks | 2% | 1% | 1% | 4% |
| Other | 5% | 9% | 3% | 5% |

Broad priority
 Community development – 32%
 Environmental progress – 27%
 Urban – 26%

Key Findings

Improving existing recreation facilities and a new stadium are the highest community infrastructure priorities.

Community infrastructure spending priorities

| Spending priority ↓ | TOTAL HRM | AGE | | |
|---|-----------|-------|-------|-----|
| | | 18-34 | 35-54 | 55+ |
| Improving existing recreation facilities | 20% | 19% | 21% | 19% |
| New stadium | 16% | 15% | 16% | 16% |
| Beaches and waterfront areas | 11% | 11% | 12% | 11% |
| New outdoor recreation facilities (playgrounds / skate parks / sports fields, etc.) | 11% | 11% | 12% | 11% |
| Community centres | 10% | 11% | 11% | 8% |
| Arts and cultural facilities | 10% | 13% | 8% | 9% |
| New / refurbished community branch libraries | 6% | 3% | 7% | 7% |
| Public restrooms | 6% | 4% | 4% | 9% |
| Outdoor skating facilities | 4% | 7% | 3% | 2% |
| Arenas / ice surfaces | 3% | 4% | 1% | 3% |
| Other | 2% | 1% | 3% | 3% |

Broad priority
 Community development - 28%
 Urban - 16%

Key Findings

Renewable energy projects and reducing demand for additional land fill cells are the top environmental infrastructure priorities.

Environmental infrastructure spending priorities

| Spending priority ↓ | TOTAL HRM | AGE | | |
|--|-----------|-------|-------|-----|
| | | 18-34 | 35-54 | 55+ |
| Renewable energy projects (e.g. wind farms / solar power / etc.) | 35% | 36% | 35% | 33% |
| Develop capability to reduce waste program costs and flexibility in waste program to reduce the demand for additional land fill cells. | 28% | 18% | 29% | 34% |
| Invest in expanding recycling infrastructure | 17% | 24% | 16% | 13% |
| Water / Wastewater facilities | 10% | 9% | 11% | 10% |
| New compost plant to meet capacity and regulatory requirements | 6% | 10% | 4% | 5% |
| Build landfill cells (garbage waste site) | 3% | 2% | 2% | 4% |
| Other | 1% | 1% | 1% | 1% |

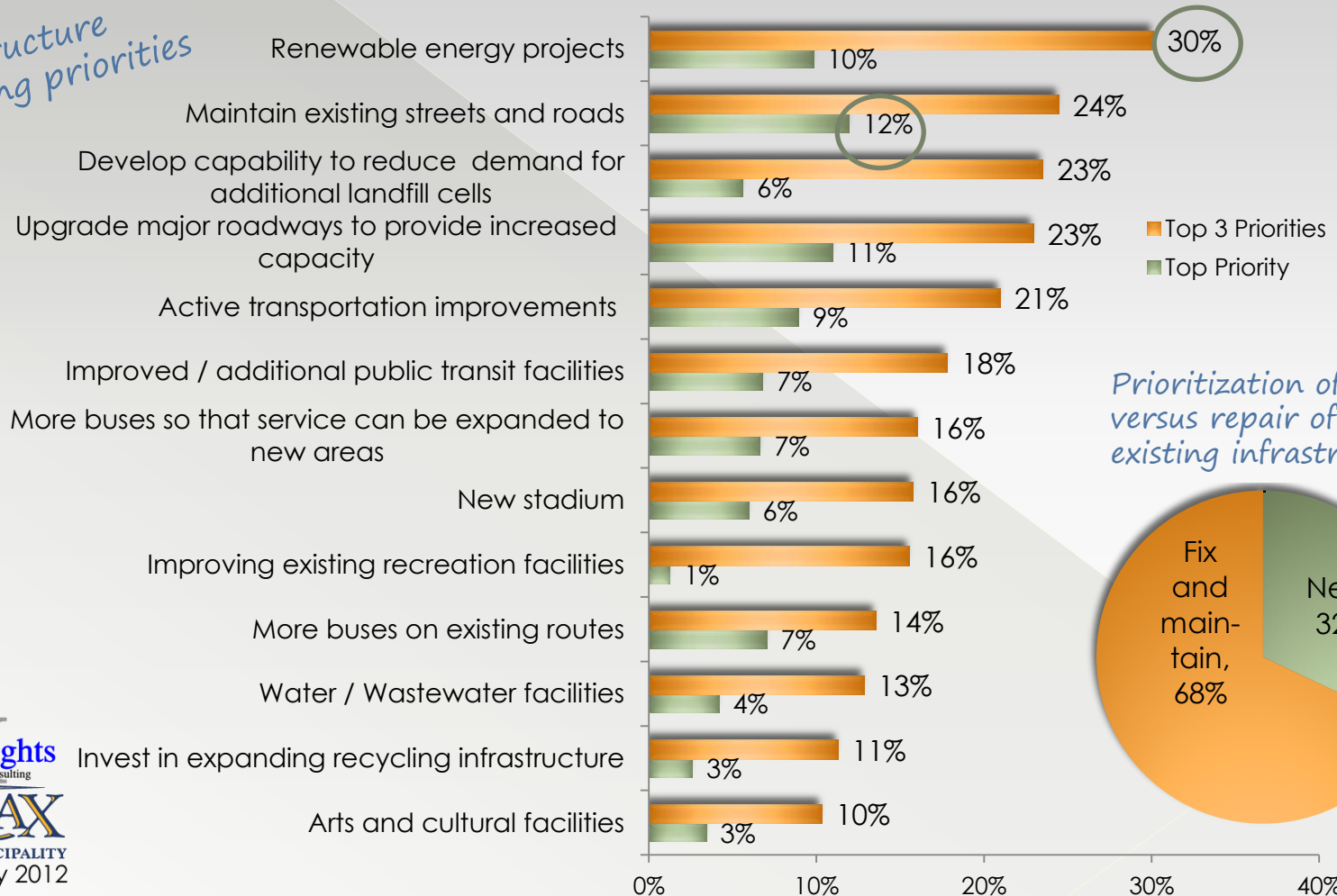
→ broad priority
Environmental progress – 40%

→ broad priority
Community development – 19%

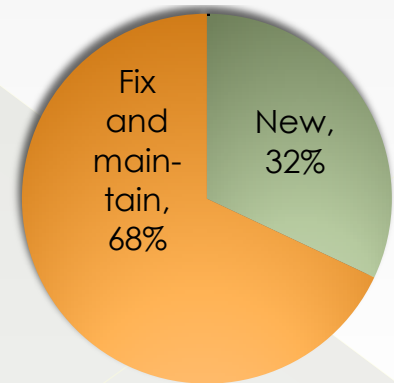
Key Findings

Considering all infrastructure projects, renewable energy projects receive a top three ranking more often than any other project.

Overall infrastructure spending priorities



Prioritization of new versus repair of existing infrastructure



Planning and Growth

- Investing in Downtown
- Addressing traffic issues

Key Findings

Parking improvements and beautification top the list of suggestions for how HRM can make the downtown more attractive.

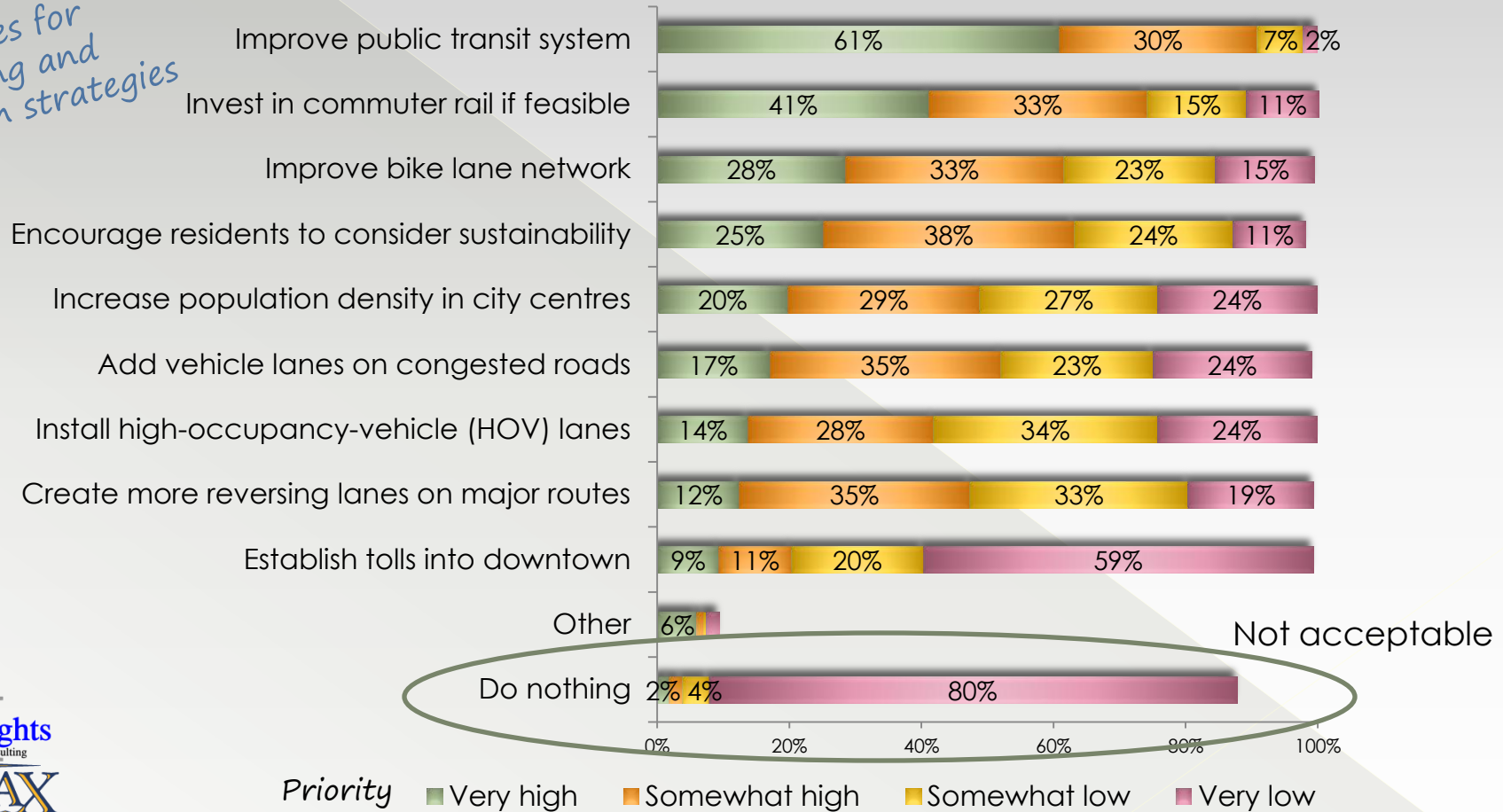
How to make downtown more attractive

| | | AGE | | |
|--|-----------|-------|-------|-----|
| | TOTAL HRM | 18-34 | 35-54 | 55+ |
| More parking / Free parking | 20% | 15% | 21% | 22% |
| Beautification - Cleanliness / graffiti / waste collection / landscaping | 14% | 11% | 14% | 15% |
| Tax incentives for businesses to locate / relocate downtown / Make it more affordable for small businesses to operate downtown | 12% | 19% | 9% | 10% |
| More / Better transit serving the downtown | 8% | 17% | 6% | 3% |
| Increased police presence | 6% | 4% | 6% | 7% |
| Make pedestrian friendly only / Block off certain roads to vehicular traffic | 5% | 4% | 6% | 4% |
| Make it easier for developers to develop / reduce red tape | 5% | 3% | 6% | 4% |
| Clean up old / derelict buildings | 4% | 3% | 4% | 3% |
| More green spaces / plazas / places for people to congregate | 3% | 3% | 3% | 3% |
| Revitalize Barrington street | 3% | 3% | 2% | 3% |
| Protect heritage elements of downtown | 2% | 3% | 2% | 3% |
| Other | 11% | 6% | 13% | 14% |

Key Findings

An improved public transit system and a new commuter rail are the most common top priorities to deal with traffic congestion.

Priorities for planning and growth strategies



Summary

- Residents priorities generally centre around 5-6 key service areas
 - Transit
 - Environment
 - Public safety
 - Transportation infrastructure
 - Taxation
 - The Economy
- While they feel safe, some residents would still like to see increased spending on public safety initiatives
- Generally satisfied with tax and service levels
 - Prefer to see spending on services mirror priorities

Questions ?

