
To: Regional Planning Committee

From: Jaspal Marwah, Regional Planner, Parks Planning and Environment
Heidi Lam, Planning and Data Analyst, Parks, Planning, and Environment

Date: June 21, 2017 Meeting Date: July 14, 2017

Subject: **Shaping Our Communities Engagement Initiative – Results of the Regional Survey on Residents’ Perspectives on What Makes Neighbourhoods Great**

RECOMMENDATION

That the MVRD Board receive for information the report dated, June 21, 2017, titled “Shaping Our Communities Engagement Initiative – Results of the Regional Survey on Residents’ Perspectives on What Makes Neighbourhoods Great”.

PURPOSE

This report provides the Regional Planning Committee and the MVRD Board with a summary of the results of the “Shaping Our Communities” regional survey undertaken in February / March 2017.

BACKGROUND

In August 2016, Metro Vancouver hired a consultant team comprised of MODUS and Kantar TNS to design and deliver a regional “Shaping our Communities” survey, intended to gain insight into how the public values, experiences, and prioritizes the land use and transportation factors that influence their everyday lives. These factors include directing growth to Urban Centres and transit-rich locations as well as complete community elements such as: walkability, access to services and amenities, mobility options, diversity of housing types and tenure, affordability, proximity to jobs, and access to cultural and recreational facilities.

The survey was approved as part of the 2016 Regional Planning budget, was delivered in February / March 2017 to a panel of 3,000 respondents with representation from across the region, and is part of the broader Shaping our Communities Engagement Initiative. The results of the survey are now available, and this report provides a summary to the Committee and Board.

SURVEY METHODOLOGY AND CONTEXT

The Shaping our Communities regional survey was developed and disseminated by Kantar TNS and MODUS, with input from the Regional Planning staff team, Regional Planning Advisory Committee members, TransLink, Health Authorities, and representatives from other agencies that have completed similar regional surveys.

Objectives and Scope

The principal objective of the survey was to gain insight into how the public values, experiences, and prioritizes land use and transportation factors that influence their everyday lives. Initially, the survey was intended to address two additional objectives: to obtain perception-based data to enhance *Metro 2040* performance measures (specifically around Goal 4 regarding Complete Communities);

and, to provide an education and outreach component to help the public better understand regional issues related to land use.

However, as work on the survey got underway, the objectives evolved. First, the return of the long form Census meant that the original need for producing data to supplement the National Household Survey would no longer be necessary. Second, feedback from other agencies that had recently undertaken regional surveys confirmed that the target response rate from the public would be very difficult to achieve, and that as a result, a survey would not be an effective tool with which to conduct a public education and outreach campaign.

Methodology

The survey was issued to a panel of respondents online, and took about 12 minutes to complete. Targets were established to ensure representative sampling from across the region. The survey was completed by 3001 respondents, yielding the following breakdown:

	Target	Completed
Total	3000	3001
Port Moody/ Anmore/ Belcarra	76	76
Burnaby	275	276
Coquitlam	100	100
Delta / Tsawwassen First Nation	100	101
City of Langley	69	69
Maple Ridge and Pitt Meadows	100	100
New Westminister	125	126
City of North Vancouver	115	115
Port Coquitlam	100	86
Richmond	303	304
Surrey and White Rock	625	628
Vancouver/ Electoral Area A	700	705
West Vancouver/ Bowen Island / Lion's Bay	81	82
Township of Langley	100	101
District of North Vancouver	131	132

The survey results are weighted in accordance with the 2011 Census regional population distribution by municipality, age and gender. The survey asked respondents about: their experience of the characteristics of their current neighbourhood, the elements of their community that are important to them, opinions about change in their neighbourhood, and how they value different elements of complete communities in their choice of neighbourhood.

The survey also included one question based on a Max Diff methodology, which allowed respondents to consider trade-offs among 18 attributes of complete communities (listed in the Summary of Findings section below). Respondents were asked to rank these 18 attributes by identifying those that are most and least important to them when choosing a neighbourhood to live in.

Input on the Draft Survey

The approach and methodology for the survey was presented to the Regional Planning Advisory Committee (RPAC) in November 2016. In addition, a workshop was held in December 2016 to engage members in more in-depth discussion and to provide comments on the draft survey questions and scope.

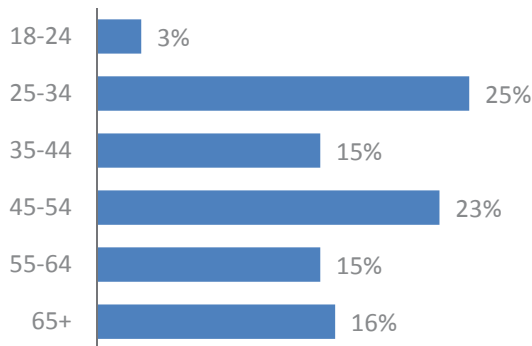
As a result of this input, the survey was updated to: remove questions about industrial and agricultural land uses in the region (with the intent to develop a second survey focused on those elements); refine the neighbourhood attributes as well as framing for values associated with complete communities; and limit the application of the survey to a panel rather than pursue a broad public response.

SUMMARY OF FINDINGS

The following section provides a summary of results highlighting respondent demographics, perceptions of elements in Metro Vancouver residents’ neighbourhoods, importance of those elements, what residents prioritize when choosing a neighbourhood, and perceptions of change in neighbourhoods.

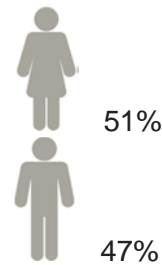
Respondent Demographics

Age



* 3% prefer not to say

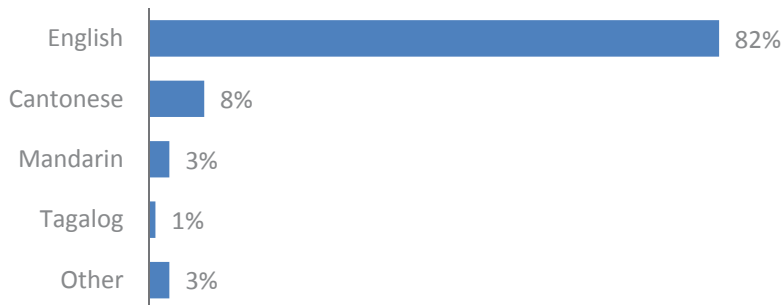
Gender



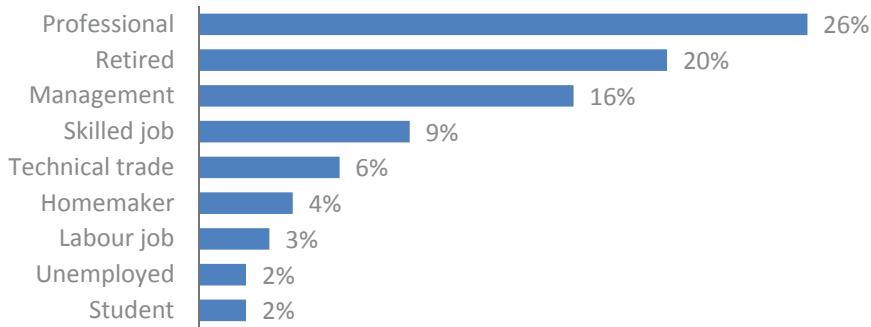
* 2% prefer not to say

Language

* 3% prefer not to say

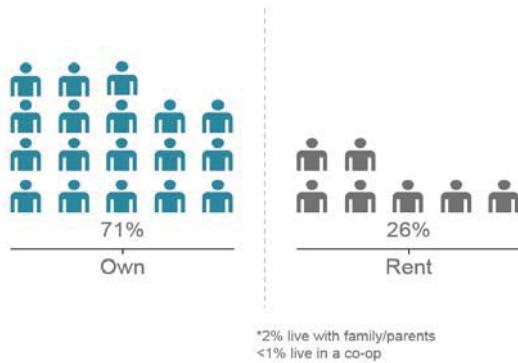


Employment

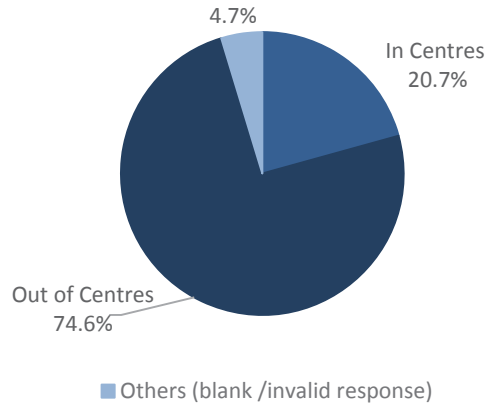


*11% prefer not to say

Housing Tenure



Living In or Out of *Metro 2040* Urban Centres



Respondents were asked to comment on the following 18 neighbourhood attributes (list was randomized):

1. Amount of interior space in your home
2. Whether you have a backyard
3. Affordability of my housing
4. Having different types of housing in the neighbourhood (e.g. house, townhouse, apartment / condominium)
5. Good public transit from home to work and other destinations
6. Ability to get in and out of my neighbourhood by car
7. Limited traffic congestion
8. How long it takes me to commute to work or school
9. How much it costs me (\$) to commute to work or school
10. Good bike lanes or paths for cycling in my neighbourhood
11. The ability to walk to various shops, services (e.g. doctor, daycare, dry cleaner), and amenities (e.g. community centre, library, shopping)
12. Closeness of grocery stores, pharmacies, and restaurants regardless of how I get there
13. Closeness of schools and daycares

14. Closeness of recreation facilities (e.g. gym, swimming pool, tennis courts, rink or soccer fields)
15. Closeness of cultural and entertainment venues
16. Ease of getting to outdoor recreational activities or parks for hiking, cycling and being in nature
17. Amount of green space, parks, and street trees
18. Relatively little noise

Overall Findings

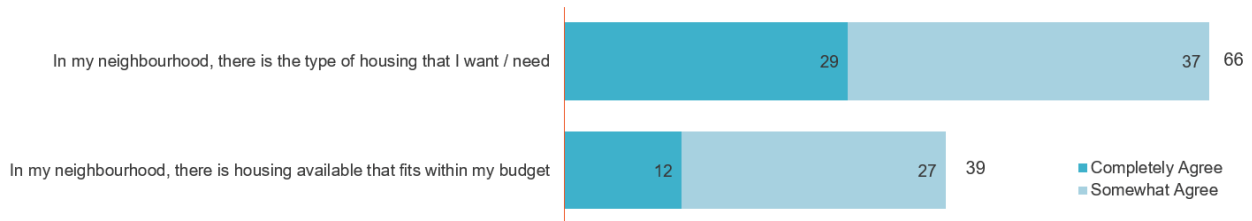
- Perhaps surprisingly, there was not a significant difference in responses between municipalities; residents across the region had similar perceptions, values and trade-offs regarding neighbourhood attributes.
- As a result of the previous finding, staff requested that the responses be coded to reflect whether respondents live inside or outside a *Metro 2040* Urban Centre. There were not sufficient responses for reporting at the individual Urban Centre level (or even Regional City Centre level), however it was feasible to investigate whether residents experience their neighbourhoods differently depending on whether they live in a *Metro 2040* Urban Centre or not.
- The responses when coded this way reveal that residents in Urban Centres are more likely to car share, take transit, walk or cycle to work /school as well as to shopping and recreational and social activities, while residents living outside of Urban Centres are more likely to use a personal vehicle. Residents in Urban Centres prioritize elements of walkability (good transit, proximity to shops, amenities, and cultural activities) and residents outside of Urban Centres place greater value on proximity to green space and limited noise and congestion.
- More pronounced differences between the two groups of respondents arose on the issue of how they experience change in their neighbourhood. Residents living in Urban Centres are more likely to have seen the changes in their neighbourhood over the past 5-10 years yielding positive improvements, whereas those living outside of Urban Centres are more likely to see no change, or a decline, in their neighbourhood over the same time period.
- The survey results also highlight potential discrepancies in respondents' understanding of the relationship between certain neighbourhood attributes. For example, respondents consider housing affordability to be important, but do not consider housing diversity as important (and of course housing diversity can improve affordability). Similarly, respondents note that the issue of increasing congestion is important, but that improving cycling infrastructure is not (cycling infrastructure can influence mode choice and therefore congestion). The data does not offer information about the causality of these discrepancies, but it does suggest areas that warrant further exploration.

What attributes do Metro Vancouver residents have in their neighbourhoods?

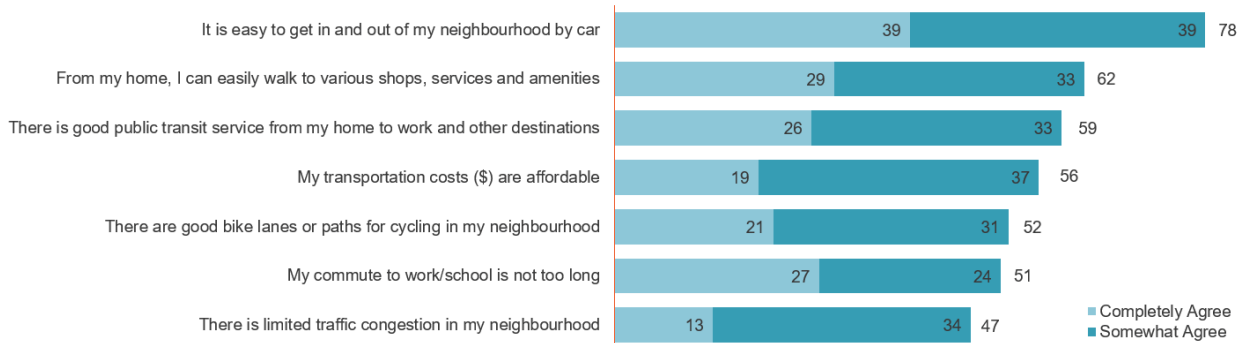
Factors that influence residents' perception of neighbourhood attributes include age, home ownership, the length of time they have lived in their neighbourhood, type of dwelling and mode of transportation used.

- Residents recognize the presence of many attributes in their current neighbourhood with a strong majority noting their neighbourhood is:

- Close to amenities (83% somewhat / completely agree)
- Easy to navigate by car (78% somewhat / completely agree)
- Has enough parks and greenspace (77% somewhat / completely agree)
- Has easy access to outdoor recreational activities and/or parks (75% somewhat / completely agree)
- However, residents expressed that congestion and affordable housing are significant issues in their neighbourhood.
- In terms of housing, about two-thirds of residents believe there is the type of housing they want in their neighbourhood, and only 4/10 believe there is housing that fits their budget in their neighbourhood.



- Not unexpectedly, housing type and tenure also impact how residents experience housing in their neighbourhood, with those who live in semi-detached or apartments/condos, homeowners, and those who have lived in their neighbourhood for less than 10 years being more likely to believe that there is housing available that fits their budget.
- Similarly, age also affects this perception with seniors being more likely to believe there is housing available within their budget in their neighbourhood, and millennials being less likely.
- In terms of transportation, the majority of residents believe their neighbourhood is easily accessible by car, and over half of residents have a positive view about elements related to transportation in their neighbourhood in terms of walkability, public transit service, affordability of transportation options, cycling network, and commute time to work.



- Housing type and tenure also impact how residents experience transportation elements of their neighbourhoods. Those who own their own home are more likely to believe that it is easy to get in and out of their neighbourhood by car and that there is limited traffic congestion, while those who rent are more likely to believe their commute is not too long.

Those who live in apartments/condos are more likely to believe there is good public transit and that they can easily walk to shops, services and amenities.

- Whether residents live in or out of Urban Centres also impacts the elements of neighbourhoods. Residents living in Urban Centres are more likely to feel that their neighbourhood has good public transit and that they can easily walk to shops and amenities. And residents living outside of Urban Centres are more likely to feel their neighbourhood has enough parks, green space and street trees and is not too noisy.
- Mode of transportation used also influences residents' experience of transportation elements in their neighbourhood, with those who walk, cycle or take transit to work are more likely to believe there is good public transit, and those who have a short drive to work believe they have limited traffic congestion in their neighbourhood.

What do Metro Vancouver residents consider to be important attributes in their neighbourhood?

- Being close to amenities (grocery stores, pharmacies and restaurants), the amount of green space, parks and street trees, and a limited amount of noise were rated the most important neighbourhood attributes.
- Seniors (65+) are more likely than younger residents to consider being close to amenities is most important, followed by a limited amount of noise, and the ability to get in and out of their neighbourhood by car.
- Home owners placed a higher importance on the amount of green space, limited amount of noise, ability to get in and out of their neighbourhood by car, limited traffic congestion, ease of getting to outdoor activities, and closeness to schools and daycares.
- Renters find good transit, closeness to work or school, and affordability of housing to be the most important attributes.
- Those who walk or cycle to work (under 10 minutes) are more likely to consider the amount of green space, parks and street trees most important, while those with a long drive to work (over 45 minutes) consider it most important to have a limited amount of noise, limited congestion, and easy access to outdoor recreation activities.

What do Metro Vancouver residents prioritize when choosing a neighbourhood?

- Residents prioritize the affordability of housing (88%), followed by proximity to amenities (grocery stores, pharmacies and restaurants) (77%) and walkability (68%).
- Amount of interior space in the home is ranked higher than having a backyard.
- Affordability of housing is clearly a top concern; however, good public transit and walkability scored much higher than the cost of transportation.
- Residents living in Urban Centres prioritize proximity to amenities and services, walkability, good public transit, housing affordability and closeness of cultural and entertainment venues. And residents outside of Urban Centres prioritize proximity to green space, parks and street trees, limited amount of noise, easy navigation by car, and limited traffic congestion.

How have Metro Vancouver residents experienced change in their neighbourhood?

- Over half (54%) of residents don't feel their neighbourhood has changed in the past 5-10 years, while 19% believe it has changed for the better and 17% for the worse.
- In terms of specific neighbourhood elements, over the past 5-10 years, residents are experiencing the most improvements in bike lanes (35%), housing variety (34%), public transit (32%), and proximity to amenities (31%).
- In contrast, over the past 5-10 years, residents are experiencing declines in housing affordability (75%) and increasing traffic congestion (64%).
- Residents' feelings toward the speed of development in their neighbourhood is divided evenly across different age groups. Overall, 47% of residents are comfortable with the pace of development happening in their neighbourhood, while 23% expressed neutrality and 28% not comfortable with the pace of development.
- Homeowners and those who have lived in their neighbourhood for less than 5 years are more comfortable with the pace of development in their neighbourhood.
- Residents living in Urban Centres are more likely to feel that their neighbourhood has improved (29%) in the past 5-10 years in comparison to residents living outside of Urban Centres (16%).
- Specifically, residents living in Urban Centres feel that public transit (43%), proximity to goods and services (42%), bike lanes (40%), and walkability to daily activities improved over the past 5-10 years.
- Residents living outside of Urban Centres are more likely to feel that their neighbourhood is about the same or worse than it was 5-10 years ago, specifically with regards to the amount of noise (53%), commute time (29%), the amount of green space, parks and street trees (16%), public transit (15%), and access to outdoor activities (13%).

Data limitations

The survey was conducted via a panel of respondents in the region, not a random sampling of Metro Vancouver residents; therefore, basic statistical limitations such as margins of error do not apply. The panel was weighted to 2011 Census data (age, population, gender) for Metro Vancouver municipalities. The results do not allow for reporting out at a finer granularity than the municipal scale. However, it does allow for reporting results for residents living in and out of *Metro 2040* Urban Centres.

NEXT STEPS

Metro Vancouver will continue to analyze the results of the survey to help inform policy development and implementation of *Metro 2040* policies associated with complete communities. Metro Vancouver will leverage this research about residents' perceptions, values and trade-offs to assist with communications and outreach about *Metro 2040* policies with member municipalities, other agencies, interested stakeholders and the public. These efforts may include: posting infographics and other materials on the Metro Vancouver website and social media, news releases, and sustainability breakfasts. The survey findings will also be provided to local governments to assist with understanding how policies directing growth to a network of compact, complete communities are

being experienced by residents and with identifying the elements of compact, complete communities that resonate with most with residents across the region.

This survey is nested within the broader Shaping our Communities Engagement Initiative. Next steps include a second survey with a more streamlined panel of respondents, focusing on perceptions, understanding and values associated with industrial and agricultural land uses. Staff will also engage with the Regional Planning Advisory Committee to identify further opportunities to disseminate findings from both surveys.

ALTERNATIVES

As this is an information report, no alternatives are provided.

FINANCIAL IMPLICATIONS

The budget for the survey was \$129,000, as approved by the MVRD Board in 2016. The budget included \$86,000 from the Regional Planning Division, as well as \$38,000 from the External Relations Department. As noted in the Objectives and Scope section above, project scope was narrowed. As a result, two separate surveys are being completed, rather than just one. This report focuses on the results of the first survey which cost just under \$80,000. The second survey focusing on agricultural and industrial lands is anticipated to cost \$40,000, and will be completed in 2017 using remaining funds from the approved budget.

SUMMARY / CONCLUSION

In August 2016, Metro Vancouver hired a consultant team comprised of MODUS and Kantar TNS to design and deliver a regional “Shaping our Communities” survey, intended to gain insight into how the public values, experiences, and prioritizes land use and transportation factors that influence their everyday lives. These factors include directing growth to Urban Centres and transit rich locations and complete community elements such as: walkability, access to services and amenities, mobility options, diversity of housing types and tenures, affordability, proximity to jobs, and access to cultural and recreational facilities.

The survey was delivered in January and February 2017 to a panel of 3,000 respondents with representation from across the region. Results show that:

- Factors that influence residents’ perception of neighbourhood attributes include age, home ownership, length of time they’ve lived in their neighbourhood, type of dwelling and mode of transportation used;
- Residents consider being close to amenities (e.g. grocery stores, pharmacies and restaurants), the amount of green space, parks and street trees, and a limited amount of noise to be the most important neighbourhood attributes;
- When choosing a neighbourhood, residents prioritize the affordability of housing (88%), followed by proximity to amenities (grocery stores, pharmacies and restaurants) (77%) and walkability (68%); and
- In terms of how residents are experiencing change in their neighbourhood, over half (54%) of residents don’t feel their neighbourhood has changed in the past 5-10 years, while 19%

believe it has changed for the better and 17% for the worse. Residents of Urban Centres tend to view change more positively than residents living outside of Urban Centres.

There was not a significant difference in responses among municipalities; residents across the region had similar perceptions, values and trade-offs among neighbourhood attributes. As a result of this finding, staff requested that the responses be coded as being within or outside a *Metro 2040* Urban Centre.

Overall, the survey results provide Metro Vancouver with ongoing opportunities for analysis and to draw connections between neighbourhood attributes and the *Metro 2040* goals and policies associated with developing complete communities. Metro Vancouver will leverage this primary research about residents' perceptions, values and trade-offs with an aim to better frame communications and outreach about *Metro 2040* policies with member municipalities, other agencies and interested stakeholders throughout the region.

Attachment: Shaping Our Communities Regional Survey (*Orbit Doc #22170191*)