

CHARLOTTETOWN 2019

PERCEPTIONS OF CHANGE SURVEY



Whether Atlantic Canadians are open to change and how it is perceived are pressing questions of social and political importance. Cities in the region have, over the last decade, experienced urban growth, shifting economies, increased immigration, and the return of younger people, which are all prompting a need for new data on the region in order to study how its residents are experiencing and understanding these changes. For this reason, the Perceptions of Change project was launched at Dalhousie University, with funding from the Social Sciences and Humanities Research Council of Canada.

In consultation with colleagues at Memorial University, University of New Brunswick, McMaster University, University of British Columbia, University of Toronto, and Western University, a team of researchers at Dalhousie conducted a telephone survey of Charlottetown residents during May through July of 2019. The purpose of this survey was to assess what changes residents of Charlottetown observed over the last five to 10 years in their neighbourhood and city as a whole. It also aimed to better understand how they feel about those changes. This is the second survey conducted in Charlottetown as a part of the Perceptions of Change research project.

Overall, residents of Charlottetown observed changes to the population and built environment of the city. They observed significant immigration, a housing crisis associated with the rise of short-term rentals, and a boom in the local economy largely attributed to the city's rising multiculturalism. While residents generally felt that that city's economy had improved over the last five to 10 years, the sentiment was not echoed at the neighbourhood level when asked about affordability. Residents of Charlottetown also observed a boom in the city's population and an increase in its diversity. In terms of the natural environment, residents were not observing much change overall, but when they did see change, perceptions were divided. When changes to the natural environment were observed, they were typically perceived as worsening in the city but improving in their neighbourhoods.

EXECUTIVE SUMMARY

- Residents of Charlottetown mentioned changes to immigration and diversity, as well as housing/apartments/condos as the biggest changes in the city in the last five to 10 years.
- Sixty-nine percent of participants believed the city's overall economic conditions had improved. Fewer reported economic improvements in their neighbourhoods.
- The majority, 75%, felt their neighbourhoods had become less affordable.
- The majority of participants believed the city had become more diverse and has more senior citizens. These changes were also observed at the neighbourhood level.
- On average, Charlottetown residents believed that 58% of their neighbours share similar values and beliefs and they generally reported high levels of "fitting in" to their neighbourhoods.
- Ninety-nine percent of participants noted the construction of new buildings and homes in their city, and 80% within their neighbourhoods.
- The majority of participants reported no change in the condition of buildings and houses or with the prevalence of rental housing in their neighbourhoods.
- Perceptions of changes to the natural environment, both in the city and in participants' neighbourhoods, were mixed. The majority reported no change to air quality, but perceived changes in water quality and in the number of green spaces in the city.

CHANGES TO THE CITY

When residents of Charlottetown were asked to identify the biggest changes in the city over the last five to 10 years, the top five changes mentioned were immigration and diversity; housing/apartments/condos; population and growth; business/economy; as well as infrastructure.

2019	Ct.	Perc.
Immigration and Diversity	133	33%
Housing/Apartments/Condos	126	31%
Population & Growth	119	29%
Business/Economy	104	26%
Infrastructure	64	16%

Immigration and diversity were the most mentioned changes in Charlottetown, with 33% of participants noting increased immigration and the growing diversity in the city. A close second with 31%, was change in **housing/apartments/condos**. When housing was discussed, it was often in conjunction with the rise of Airbnb and a housing crisis. Twenty-nine percent of participants also discussed **population and growth**. This is unsurprising given the number of participants who noted an influx of immigrants to the area. Twenty-six percent of participants observed changes to the city's **businesses and economy**, including economic growth as a by-product of increased immigration. Finally, 16% of residents surveyed identified changes to **city infrastructure** as one of the most notable changes to the city, with many referring to the expansion of city infrastructure to accommodate newcomers.

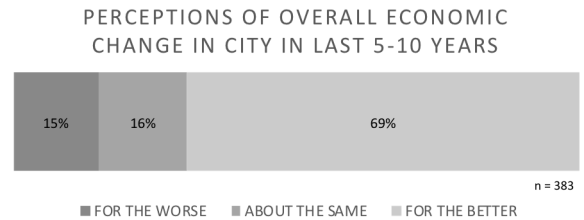
Given that the top five changes mentioned by survey participants revolve around an increase in the diversity of the city's population and the expansion of the city itself, it is clear that Charlottetown residents are attuned to the impacts that increased immigration is having on their city.

ECONOMIC CHANGES

Participants were asked about economic changes in their city and neighbourhood. Sixty-one percent noted an increase in the average income while more than a third, 34%, observed a decrease. Eighty-five percent of Charlottetown residents surveyed observed higher rates of employment.

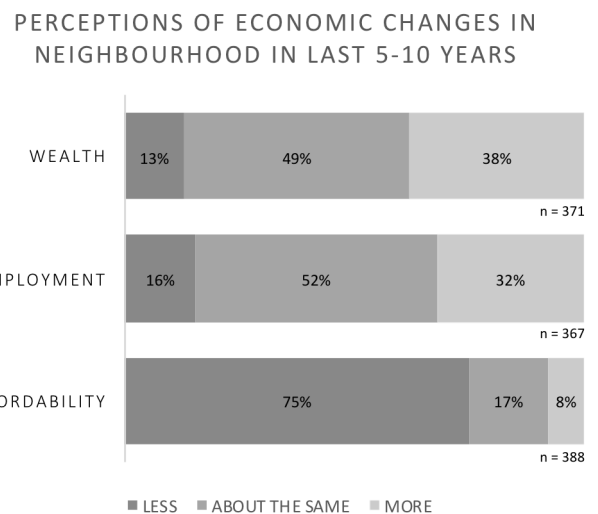


When asked about their overall perception of economic changes in the city, 69% of Charlottetown residents reported seeing change for the better.



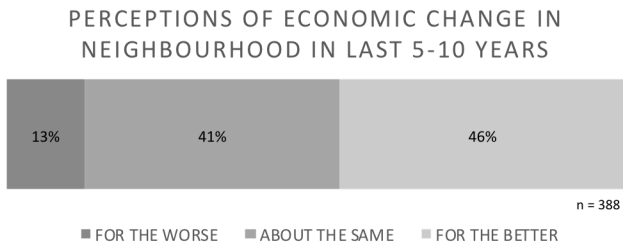
Participants were also asked about their perceptions of the economic conditions of their neighbourhood. On average, they estimated their neighbourhood's unemployment rate at 11% and the percentage of residents with low incomes in their neighbourhood at 19%.

Thirty-eight percent of Charlottetown residents surveyed reported that there was more wealth in their neighbourhood compared to five to 10 years ago and 49% reported no change. Similarly, 32% of participants felt that more neighbourhood residents were employed now compared to five to 10 years ago and 52% felt there was no change. Just 8% of participants felt their neighbourhood was more affordable now compared to five to 10 years ago, while 75% felt it was less affordable. This points to potential tensions between support for growth but concern over affordability.



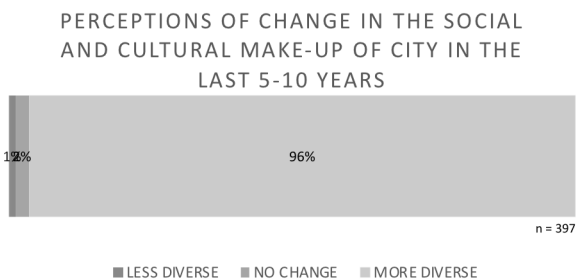
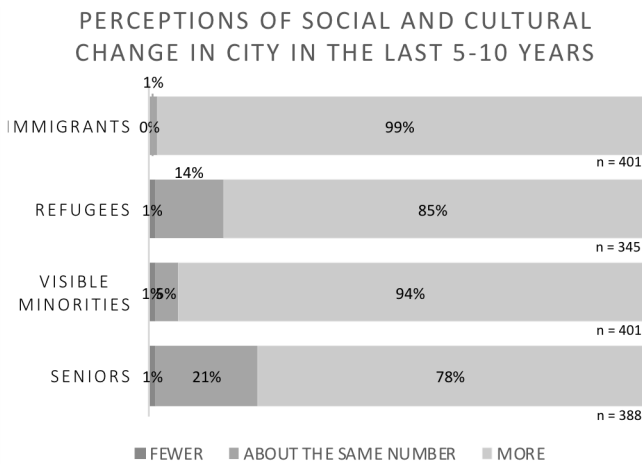
When participants were asked about their overall perceptions of economic change in their

neighbourhoods, 46% observed changes for the better and 41% felt things were about the same.



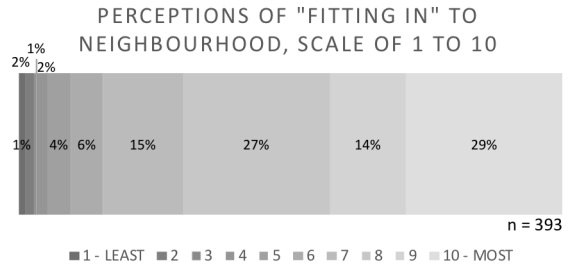
SOCIAL AND CULTURAL CHANGES

When participants were asked about social and cultural changes in Charlottetown over the last five to 10 years, 99% reported an increase in the number of immigrants; 85% observed an increase in the number of refugees; 94% reported an increase in the number of visible minority residents; and 78% noted an increase in the number of senior citizens. When asked about overall social and cultural changes, 96% of survey participants felt that the city had become more diverse over the last five to 10 years.



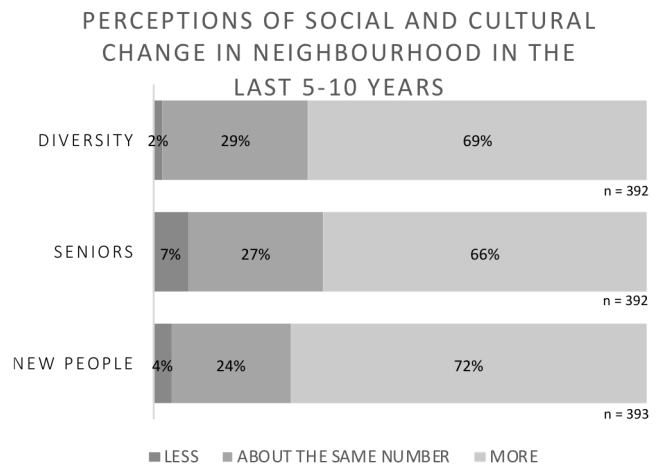
When asked what percentage of people in their neighbourhood shared similar values and beliefs, participants estimated, on average, that 58% of

people did. The most common estimate was 60%, but a wide range of estimates were offered, with the majority of participants estimating between 36% and 80%. When asked how well they believed they “fit in” to their neighbourhood on a scale from one to 10, where 10 is the strongest sense of fitting in, residents of Charlottetown on average reported “8,” largely expressing a strong sense of fitting in and belonging.



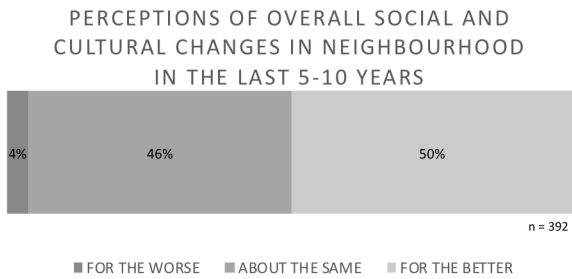
Participants were also asked about social and cultural diversity within their neighbourhoods. On average, Charlottetown residents surveyed estimated that 14% of their neighbours were immigrants, 3% were refugees, 15% were visible minorities, 44% had a university degree, and 36% were senior citizens.

Sixty-nine percent of residents felt their neighbourhood is more diverse compared to five to 10 years ago and 29% expressed that it had not changed. The majority of participants, 66%, indicated that there are more senior citizens. Similarly, 72% of participants reported more new residents in the neighbourhood.



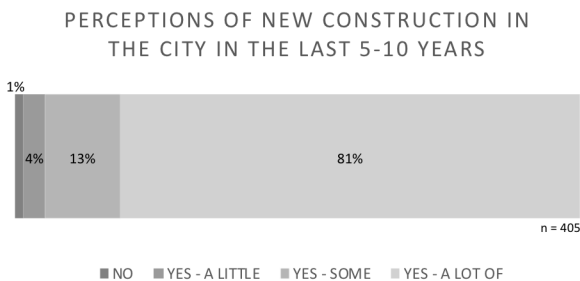
Overall, when participants were asked to assess the social and cultural changes in their neighbourhood,

50% observed changes for the better and 46% indicated that things had not changed.



CHANGES TO THE BUILT ENVIRONMENT

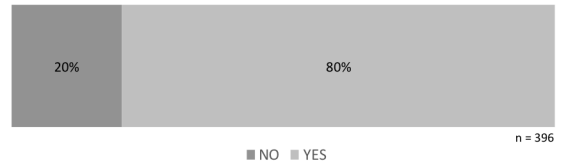
Participants were also asked about changes to their built and natural environments. Eighty-one percent of Charlottetown residents surveyed observed “a lot” of new construction in the city compared to five to 10 years ago. Overall, 99% of participants mentioned some change in the amount of new construction in the city.



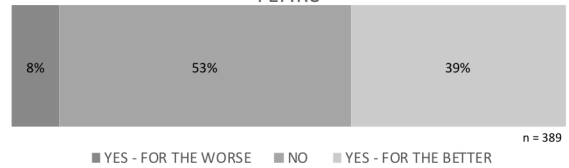
When asked about the condition of buildings and homes, participants estimated on average that 11% of buildings and houses in their neighbourhood were in need of repair. When asked to estimate the percentage of rental housing in their neighbourhood, participants put this figure at 21%.

Residents of Charlottetown were also asked about the changes to the built environment in their neighbourhoods. Eighty percent reported new buildings and homes being constructed in the neighbourhood in the last five to 10 years. As for the conditions of existing buildings and homes in their neighbourhood, 39% of participants reported change for the better and only 8% reported change for the worse in the last five to 10 years.

PERCEPTIONS OF NEW CONSTRUCTION OF BUILDINGS AND HOMES IN THE NEIGHBOURHOOD IN THE LAST 5-10 YEARS

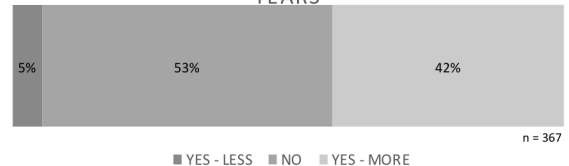


PERCEPTIONS OF THE CONDITION OF BUILDINGS AND HOMES IN THE NEIGHBOURHOOD IN THE LAST 5-10 YEARS



Participants were also asked about housing tenure, and 42% of those surveyed observed an increase in rental housing in their neighbourhood compared to five to 10 years earlier. The majority of participants, 53%, did not perceive any change.

PERCEPTIONS OF CHANGE IN NUMBER OF RENTED HOMES IN THE NEIGHBOURHOOD IN THE LAST 5-10 YEARS



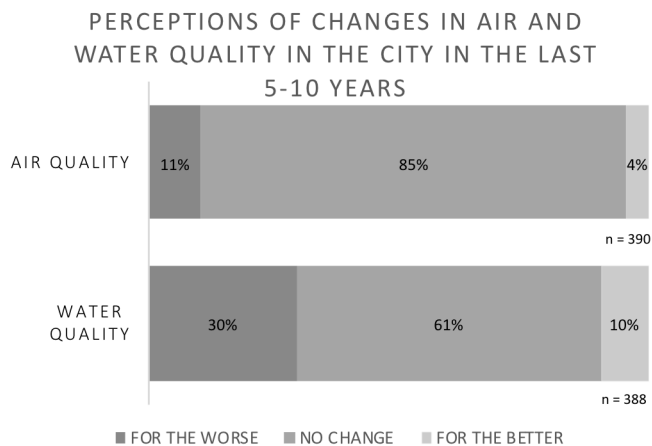
Overall, 60% of survey participants felt that changes in their neighbourhood’s buildings and homes were for the better, and 36% felt that buildings and homes had generally stayed about the same in the last five to 10 years.

PERCEPTIONS OF OVERALL CHANGES TO NEIGHBOURHOOD BUILDINGS AND HOMES IN THE LAST 5-10 YEARS

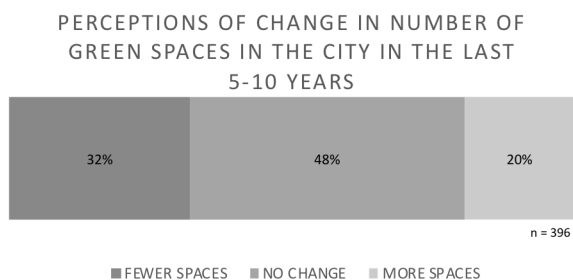


CHANGES TO THE NATURAL ENVIRONMENT

Perceptions of the natural environment were also examined. The majority of participants, 85%, reported no change in the city's air quality over the last five to 10 years, while 11% felt that it had changed for the worse. Sixty-one percent of Charlottetown residents saw no change in the quality of the city's natural bodies of water while 30% observed a change for the worse compared to five to 10 years ago.

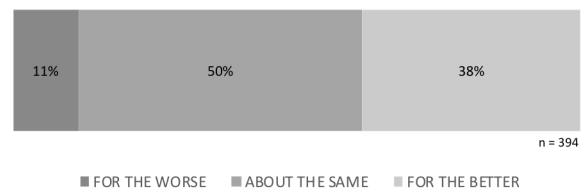


When asked about changes in the number of green spaces in the city, 32% of participants felt there were fewer, 48% felt there was no change, and 20% felt there were more green spaces in the city now compared to five to 10 years ago.



At the neighbourhood level, perceptions were more positive. Fifty percent of Charlottetown residents participating in the survey reported no overall change to the natural environment in their neighbourhood in the last five to 10 years, 38% reported change for the better, and 11% noted that change had been for the worse.

PERCEPTIONS OF OVERALL ENVIRONMENTAL CHANGES IN NEIGHBOURHOOD IN THE LAST 5-10 YEARS



HOW HAVE PERCEPTIONS CHANGED SINCE 2017?

Surveys on Charlottetown were conducted in 2017 and 2019, and in both rounds Charlottetown residents identified changes to immigration and diversity as the biggest changes occurring in the city. Compared to 2017 where it ranked fifth among the top changes mentioned by people Charlottetown, population changes in 2019 were the second most observed change in the city. The number of participants who commented on change in the city's businesses and economy as a top change decreased between 2017 and 2019.

There was, however, an increase in positive perceptions of economic changes in the city between 2017 to 2019 when participants' were specifically asked about such changes. In 2019, there was a 7 percentage point increase in the proportion of Charlottetown residents who observed overall change for the better compared 2017. There were similar increases in perceived income and employment levels in the city, with a five-percentage point increase in those who observe increased income and a 17 percentage point increase in those who perceive higher employment. At the neighbourhood level, the proportion of Charlottetown residents who observed overall economic change for the better increased by 13 percentage points between 2017 and 2019. In 2019, 75% of Charlottetown residents said their neighbourhoods were less affordable while in 2017, although this question was asked slightly differently, 76% of participants disagreed with the statement that their neighbourhood was more affordable compared to 5 to 10 years ago.

In terms of social and cultural changes to the city and neighbourhood, there was little change in

perceptions. Participants in the 2019 survey continue to perceive the city and their neighbourhoods as being more diverse compared to five to 10 years ago. There was only a 2 percentage point increase in the number of participants who perceived their city as being more diverse, and an average decrease of 6 percentage points in the number of participants observing more refugees and visible minorities, while the number of participants observing more refugees in their city remained the same. There was also an increase of two percentage points in the proportion of people claiming a score of 8 or higher when asked about how much they fit in to the neighbourhood on a 10-point scale.

Differences in how residents perceive changes to the built environment between 2017 and 2019 were mixed. The proportion of Charlottetown residents perceiving a lot more construction in their city increased by 21 percentage points and those who perceive more rental housing in their neighbourhood increased by 14 percentage points between 2017 and 2019. Other measures of change to the built environment remained approximately the same. While participants' perceptions of changes to the natural environment in their neighbourhood were generally consistent from 2017 to 2019, the number of those who perceived fewer green spaces in their city increased by 12 percentage points in 2019 compared to 2017.

Overall, perceptions of change in 2019 largely resemble those reported in 2017. Perceptions of economic change remained generally positive, but the number of residents concerned about affordability has grown. Residents continued to perceive an increase in diversity in their city and neighbourhoods. In their environments, Charlottetown residents continue to observe the expansion of the built environment in their city and neighbourhoods, and changes to the natural environment, when observed, were generally seen as being for the worse in the city overall, but for the better in residents' neighbourhoods.

WHO PARTICIPATED IN THE SURVEY?

More women than men participated in the survey: 63% women compared to 36% men. The majority of participants, 77%, owned their homes, and 73% reported living in single detached houses. Almost all of the participants, 94%, spoke English as their first language. The average age of participants was 60. Three percent identified as visible minorities, 6% as immigrants or refugees, 1% identified as Indigenous (Indian, Métis, or Inuit), and 56% were legally married.

The majority of participants, 79%, had some post-secondary education; 29% named a Bachelor's degree as their highest level of education obtained. The median individual employment income reported by participants was between \$60,001 and \$80,000, and 48% reported spending a third or more of their incomes on housing and related expenses

SURVEY METHODOLOGY

Participants were recruited through a random selection of telephone numbers assigned to the Charlottetown Census Agglomeration, from a list that included landline and mobile telephone numbers. Twenty-three percent of participants were recruited through mobile numbers. Only participants over the age of 18 and who were residents of Charlottetown were invited to participate. To ensure confidentiality, the names and telephone numbers of the participants were not linked to their responses. The survey was designed and led by Dr. Howard Ramos, Principal Investigator for the Perceptions of Change project. The survey was conducted by student researchers through the Rural Futures Research Centre at Dalhousie University.

ACKNOWLEDGEMENTS

Special thanks to Dr. Karen Foster and the team of student researchers at the Rural Futures Research Centre for their work on the telephone survey: Golge Cagildiyani, Maggie Dingwell, Chloe Doras, Brianna Hunt, Nesma Makhoulouf, Shekara Grant, Alexandra Milmine, Rayyan Rafan, Maeghan Taverner, Izem Unlu, Nevena Vucetic, Emily Donald, Kris George,

Kayla Preston, Hailie Tattrie, Hannah Main, and Alyssa Gerhardt.

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