



Residential Telephone Survey Results

Submitted to: Strathcona County and KPMG Consulting
Submitted by: Criterion Research
Date: June 17, 2002

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1. Background

Criterion Research Corp., in partnership with KPMG Consulting and Calder Bateman, and on behalf of Strathcona County, was commissioned to conduct a telephone survey among a random sample of the general population in the County as part of the Community Consultation 2002.

The primary objectives of the research included:

- Understanding the perceived quality of life among residents of the County;
- Gauging concerns in the community, particularly as it concerns growth in the County;
- Identifying how citizens feel County officials need to prioritize various issues; and
- Understanding community values with a view to guiding long term strategic planning.

2. Research Method

2.1. Data Collection

A telephone survey of 1,200 residents of Strathcona County was completed in late May 2002. The survey was designed in close consultation with Strathcona County's Project Team. A copy of the questionnaire is included in Appendix A.

Surveys were conducted according to the actual population distribution in the County (65% urban, 25% rurban and 10% rural).

Table 1: Sample Breakdown

Region	# of interviews	Definition
Urban	780	Residents living in Sherwood Park.
Rurban	294	Residents living on an acreage 10 acres or less in size.
Rural	126	Residents living on a parcel of land greater than 10 acres in size or in a hamlet (outside of Sherwood Park).
TOTAL	1200	

A demographic profile of respondents is shown in Table 2.

Table 2: Demographic Profile of Respondents

		Total Sample*
<i>Sample size</i>		(n=1200)
Gender		
	Male	36%
	Female	64%
Age		
	18-24 years	1%
	25-34 years	13%
	35-44 years	26%
	45-54 years	27%
	55-64 years	18%
	65 years +	12%
	Average age (years)	48.5
Length of Tenure in County		
	0-3 years	14%
	4-6 years	10%
	7-10 years	12%
	11-20 years	22%
	21-30 years	26%
	31-40 years	11%
	40+ years	6%
	Mean (years)	18.1
	Median (years)	16.0
Adults in the Household		
	1 person	14%
	2 people	62%
	3 people	16%
	4+ people	6%
Children in Household Under 18		
	None	55%
	One	15%
	Two	21%
	Three or more	8%
Employment Status		
	Student	1%
	Self-employed	16%
	Employed Full-time	44%
	Employed Part-time	10%
	Homemaker	10%
	Retired	17%
	Unemployed	1%
	Other	1%
Work in County (n=834)		
	Yes	39%
	No	59%
Own/Operate a business in County (n=834)		
	Yes	17%
	No	81%
Years Farming (n=43)		
	Mean (years)	19.2
	Median (years)	13.0

Table 2: Demographic Profile of Respondents

<i>Sample size</i>	Total Sample*
	<i>(n=1200)</i>
Hamlet Lived in or Closest to (n=420)	
Antler Lake	2%
Ardrossan	36%
Collingwood Cove	2%
Josephburg	<1%
Half Moon Lake	2%
Hastings Lake	1%
North Cooking Lake	1%
South Cooking Lake	10%
Sherwood Park	40%
Other	4%

2.2. Statistical Reliability

For a given sample size, it is possible to set “confidence bounds” or limits around an observed percentage and assert that such limits are correct ninety-five percent of the time (for example). These confidence limits are valuable indicators of the reliability of observed results. When interpreting data, confidence bounds should always be kept in mind because these limits can vary dramatically depending on the sample size.

However, confidence intervals do not provide an indicator of whether an observed percentage is meaningful, as that depends on context and the interpretation that will be made, not confidence level alone. For this reason, the report highlights results that are interpreted as substantively meaningful, rather than deal exclusively with references to statistical significance.

Results for a sample size of 1,200 are accurate to ± 2.8 percentage points, 19 times out of 20.

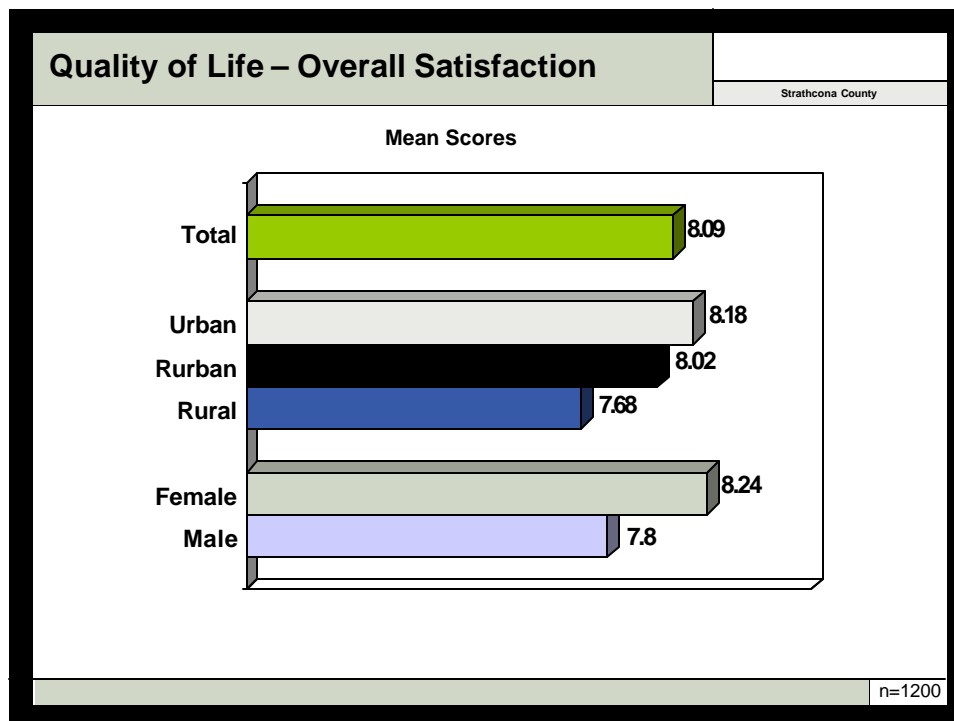
3. Analysis of Findings

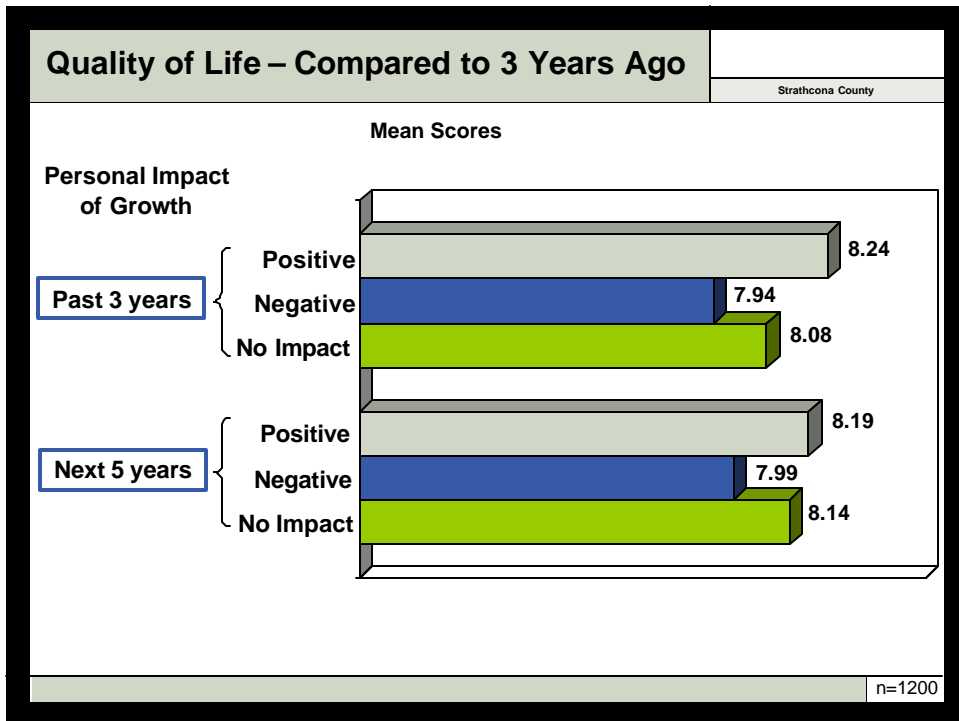
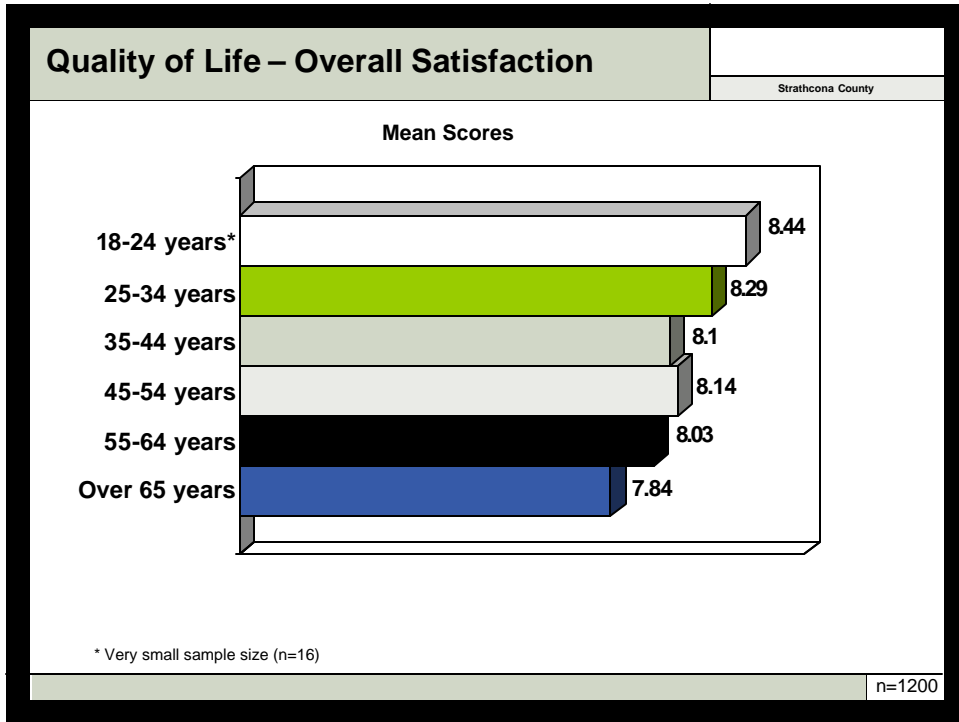
The following section details the key findings of the research.

3.1. Quality of Life

In comparison to other places, how would you rate the quality of life in Strathcona County? (One to ten scale where 1= very poor and 10= excellent)

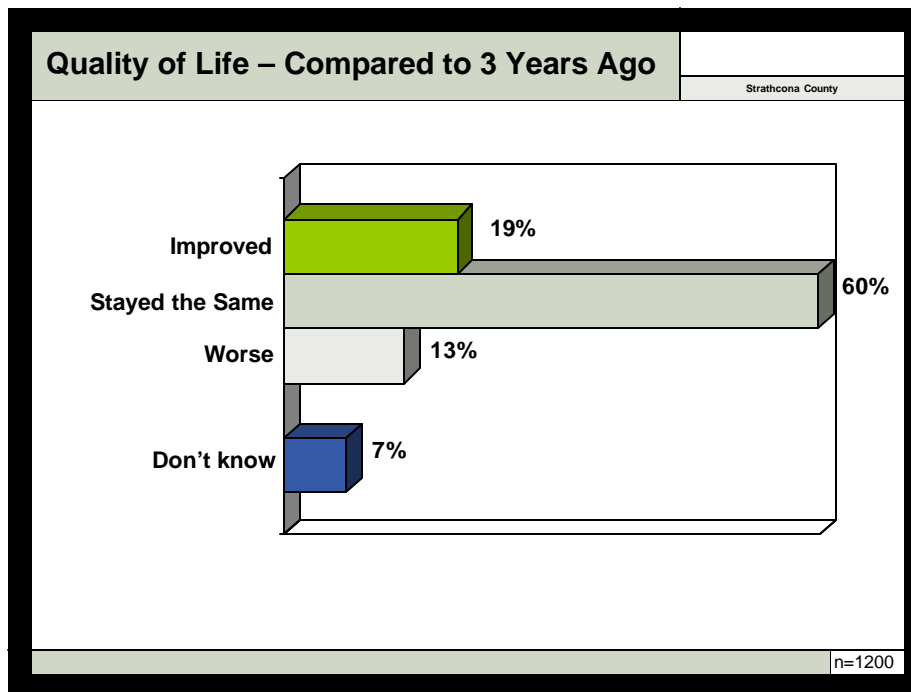
- Overall, residents rate their quality of life in the County a very high 8.09 out of 10 points. Quality of life ratings are higher in Sherwood Park, than in rurban and, particularly, rural areas of the County, and for females than males.
- Age and quality of life ratings are inversely related, with those over 65 years of age showing the lowest ratings overall at an average of 7.84 out of 10.
- Respondents who feel growth has had and will continue to have a positive impact on them personally rate their quality of life higher than those indicating a negative impact.
- There was no difference based on a person's tenure in the County.

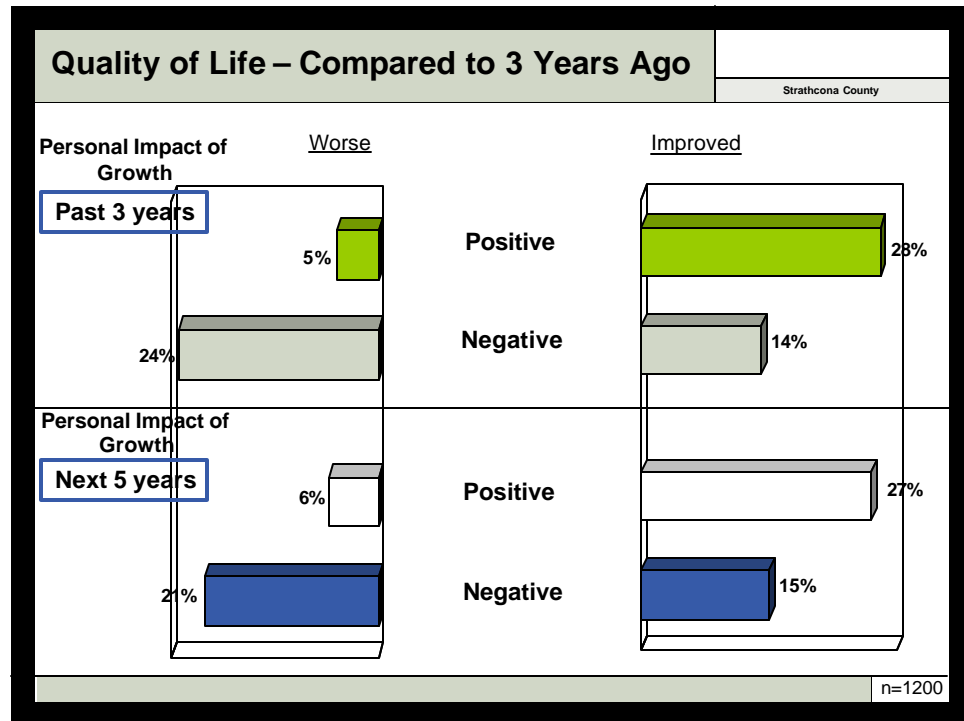
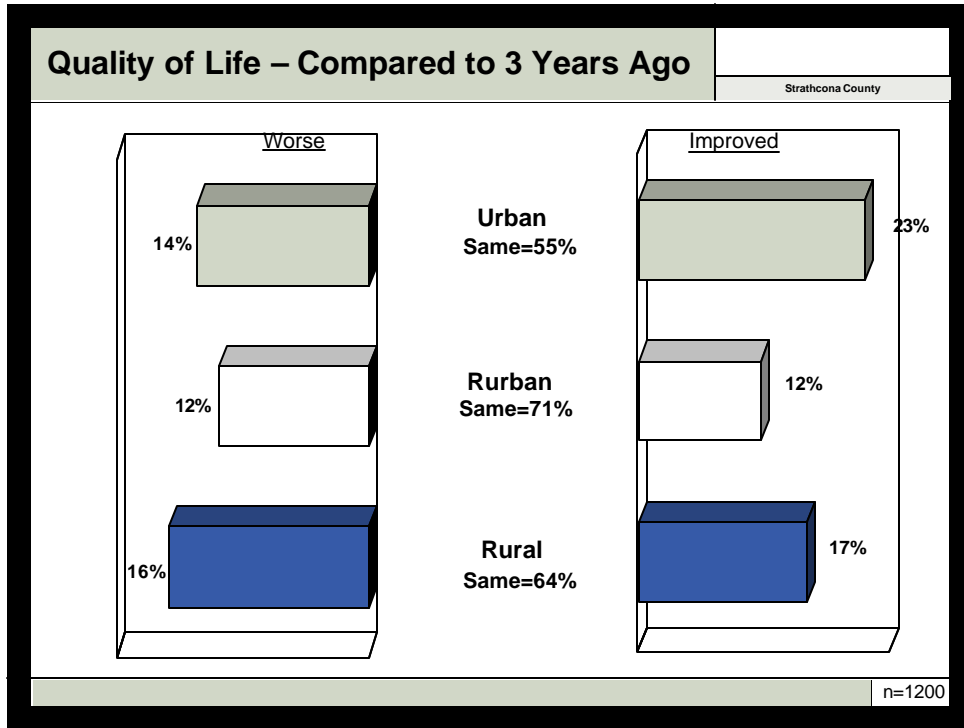




Compared to three years ago, do you think your quality of life in the County has improved, gotten worse or stayed the same?

- Compared to three years ago, 60% of residents surveyed feel their quality of life has stayed the same. Slightly less than two-in-ten (19%) feel their quality of life has improved, while fewer (13%) feel it has gotten worse.
- Urban residents are more likely than other areas to say their quality of life has improved, while rural and rural residents are more likely to report their quality of life to be the same as it was three years ago.
- Respondents reporting a positive growth impact (past 3 years and next 5 years) are more inclined to report an improvement as opposed to a worsening in their quality of life. Conversely, those who are more pessimistic about the impact of growth (past and future) are more likely to report a worsening in their quality of life.
- Age differences were small although there is a trend toward younger people being more likely to report an improvement in their quality of life compared to older people (24-25% of those under 45 reporting an improvement compared to 13% for those over 55). Further, those over 45 are slightly more likely to report their quality of life to remain unchanged or to have worsened compared to those under 45.
- Those who have lived in the County the longest (over 20 years) are most likely to report the status quo on their quality of life (64-65%) and least likely to report an improvement (16%). In comparison, newer residents (people residing less than 10 years in the County) are most likely to report an improvement (21%) and least likely to report worsening quality of life (6%).

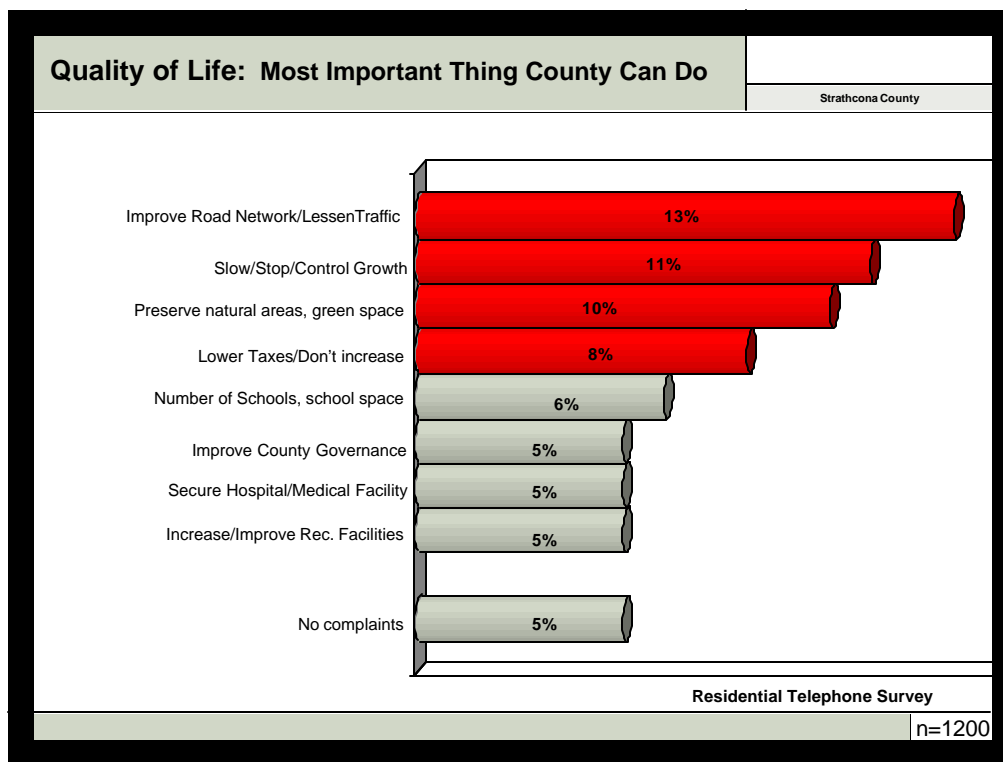




3.2. Community Concerns

What is the ONE most important thing the County can do to make it a better place in which to live? (unaided, open-ended question).

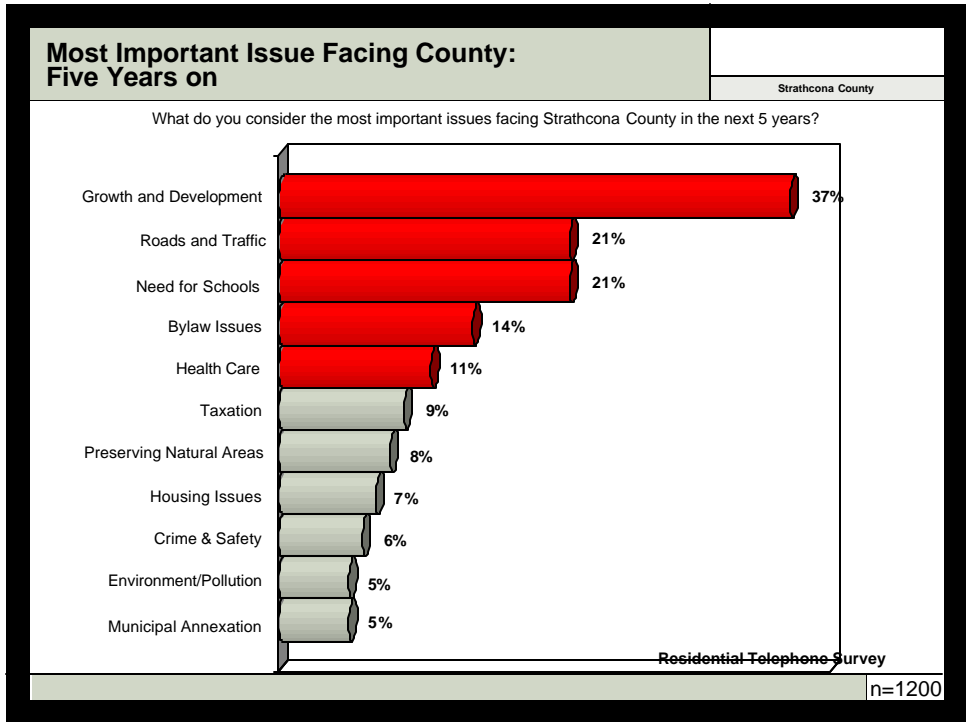
- Improving the road network and lessening traffic is the most important thing the County can do to make it a better place to live (13%);
- Slowing, stopping and otherwise controlling growth is next most important at 11% followed by preserving the County’s natural areas and green spaces (10%).
- Lowering taxes rounds out the four most important things the County can do to make it a better place to live at 8%.



3.3. Issues Facing the County in the Next Five Years

In your opinion, what do you consider the most important issues facing Strathcona County in the next five years? (unaided, open-ended question).

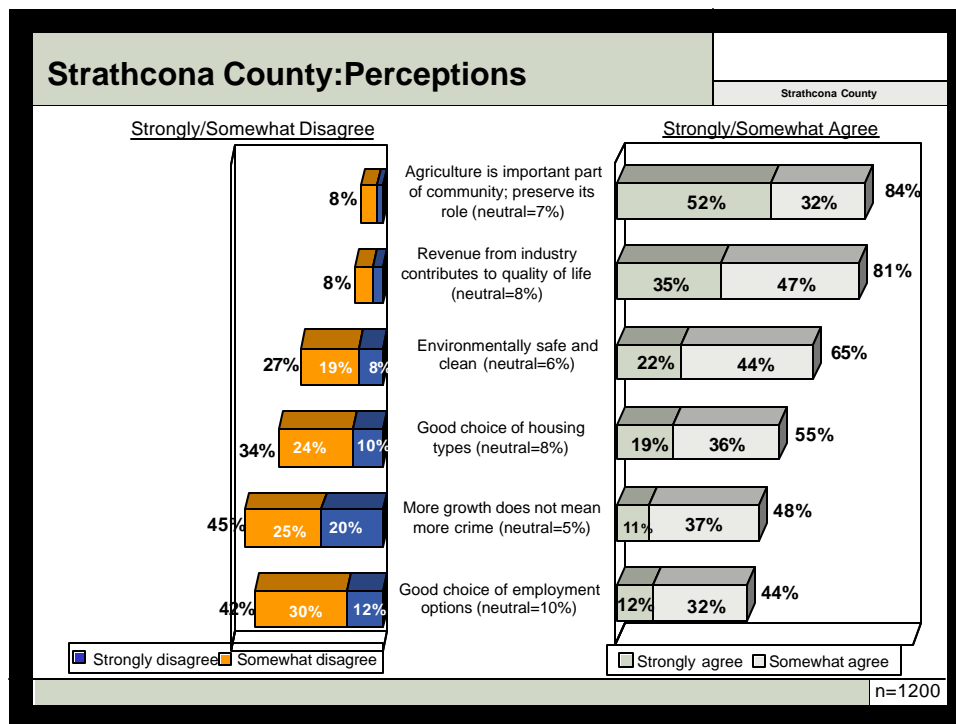
- Looking 5 years into the future, two issues, in particular, came to the fore – growth and development (37%), and improving roads and traffic congestion (21%). These items were also identified as key concerns in the earlier focus group sessions where participants noted concerns about the swiftness of growth, the changes this has created and the demands on infrastructure and services.
- On an unaided basis, growth and development issues raised were:
 - Overall worries about growth (16%);
 - Concerns about residential growth and development (12%) –more by urban and rural respondents;
 - Maintaining the size of the city (Sherwood Park) and limiting growth (8%) –more urban and rural than rural respondents;
 - Concerns about commercial growth and development (7%);
 - Anxieties about industrial growth (4%) and especially with residential expansion in close proximity to industrial areas (2%).
- Education was the third ranked issue with 21% of the sample mentioning this. The key concerns here are a lack of schools and general comments about school facilities.
- Bylaw issues are noted by 14% of respondents. Instrumental here are land use planning and zoning concerns and the smoking bylaw.
- Just over one-in-ten (11%) noted health care, principally the need for a hospital or some medical facility.
- Tax concerns were raised by 9% and slightly fewer (8%) commented on the need to preserve natural spaces.



3.4. County Perceptions

Respondents were asked to agree or disagree with a series of statements about Strathcona County as it is today.

- An overwhelming majority (84%) of survey respondents agrees – half “strongly” agreeing - agriculture is an important part of the community and the County should work hard to preserve its role in the future. Residents also agree (81%) revenue generated from industry contributes to a good quality of life for all people in the County.
- Agreement is more moderate for the environmental safety and cleanliness of the County with 65% agreeing and 27% disagreeing with this statement.
- With regard to the issue of housing options in the County, half (55%) agree there is a good choice available while one-third (34%) disagrees.
- Respondents are almost evenly divided on the range of employment options available to County residents, and on the relationship between growth and crime and social problems.



3.5. County Priorities

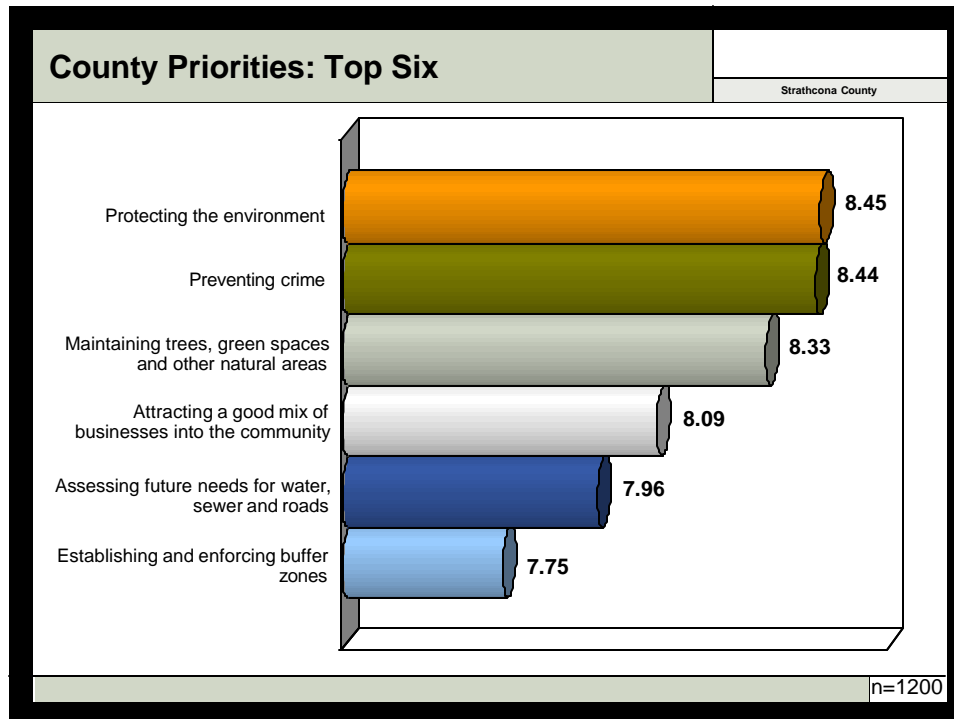
County officials have to set priorities and make difficult choices. We'd like to get an idea of what you think the County's overall priorities should be over the next couple of years. (Rating scale where 1=it is a lower priority and not in need of urgent attention and 10=it is a critical priority item and in need of urgent attention)

- Topping the list of County priorities presented to survey respondents, and items that identify some of the underlying values in the community, are protecting the environment (average rating of 8.45 out of 10) and preventing crime (8.44). Rounding out the top three is maintaining trees, green spaces and other natural areas.

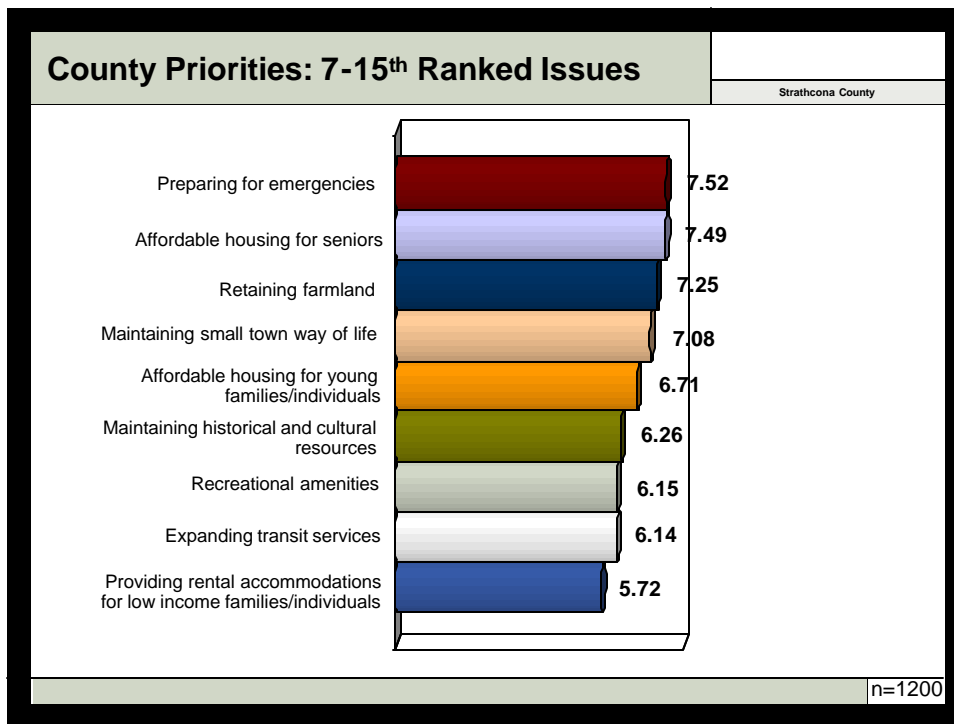
Thus, while growth and development and municipal services rank as the most important issues overall on a top-of-mind basis, residents surveyed call for the County to place urgent attention on the physical environs and the overall safety and security of the community.

As noted in focus groups, residents desire wide open spaces to play (e.g. trails, natural areas, green spaces) and a wealth of recreational amenities in which to participate in a wide range of leisure and sporting activities. Additionally, being a family oriented community, residents want a safe, secure and quiet place to live where kids can safely play.

- A second tier of priorities for citizens is the need for a good blend of businesses in the community to support the tax base, appraisals of future infrastructure and service needs (water, sewer and roads), and the establishment and enforcement of buffer zones between industrial development and other land uses.



- Mid-pack priorities concern emergency preparedness, affordable housing for seniors, the retention of farmland for agricultural purposes and the maintenance of a small town or rural way of life.
- The lowest priority overall (mean rating of 5.72 out of 10) is the provision of rental accommodations for low-income individuals and families. Not surprisingly, renters rate this significantly higher than do those who own their home (7.67 versus 5.59, respectively). Retirees, those over 55 years, single person households and rural residents also rate this a higher priority.

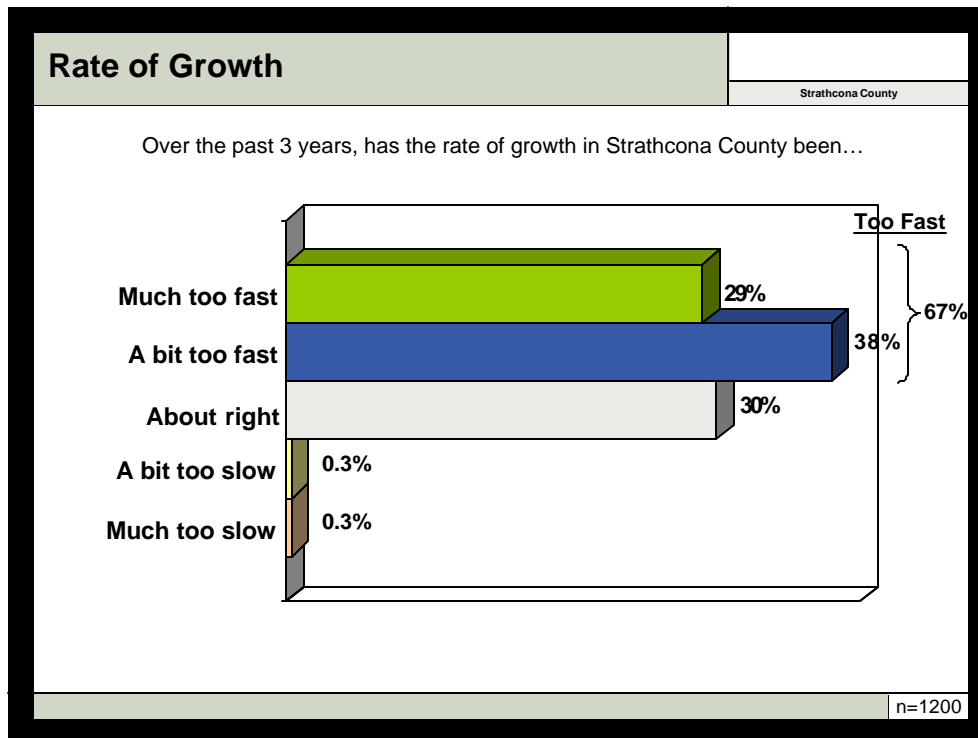


3.6. Growth Issues

Rate of Growth

In your opinion, over the past 3 years, has the rate of growth in Strathcona County been too fast, about right, or too slow?

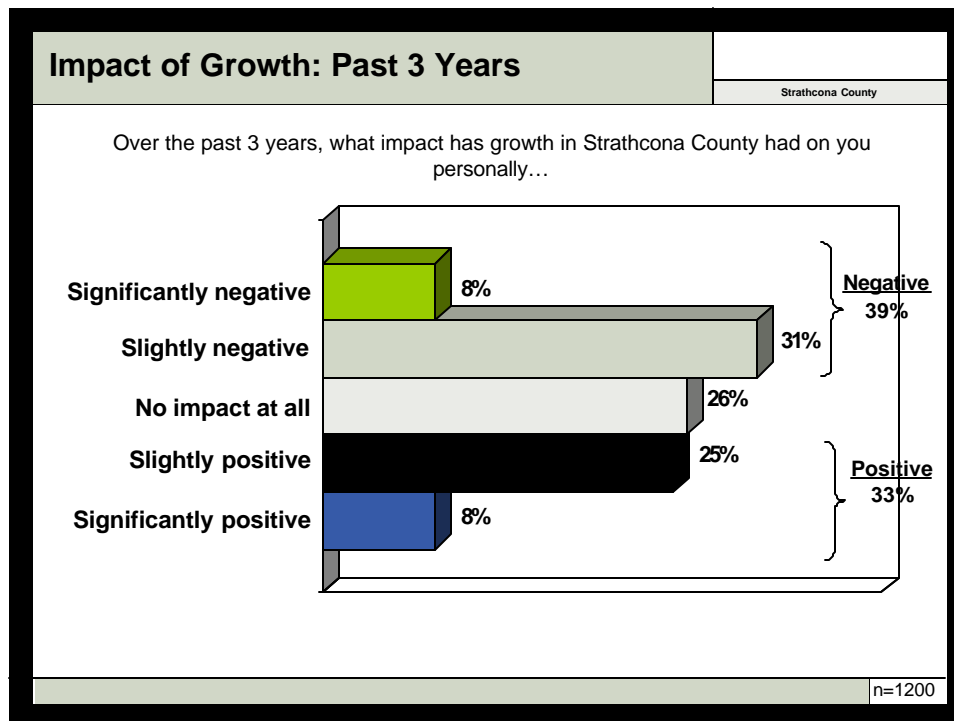
- Two-thirds of residents surveyed feel growth in the County over the past three years has been too fast, and just under half of these feel growth has been “much too fast.” A minority (30%) feel the rate of growth over the last three years has been about right.
- Respondents most likely to feel growth has occurred too quickly are females, those residing in Sherwood Park, and those who feel growth has had, and will continue to have, a negative impact on them personally.
- Self-employed residents in the survey are least likely to consider growth to have occurred too quickly, especially when compared to retirees (58% versus 72%, respectively).

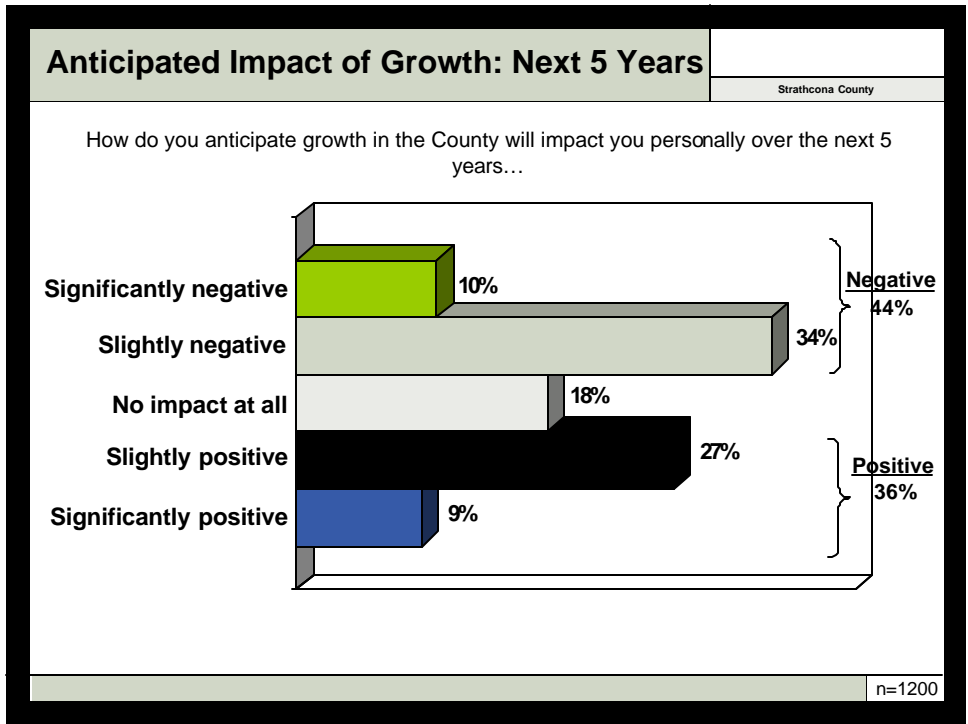


Personal Impact of Growth

Thinking back over the past three years, what impact has growth in Strathcona County had on you personally? How do you anticipate growth in the County will impact you personally over the next 5 years?

- Residents surveyed note both positive and negative impacts of growth over the past 3 years although those reporting a negative impact of growth outweigh those reporting a positive impact (39% versus 33%, respectively). Further, more residents (44%) anticipate a negative personal impact of growth in the next 5 years than those who expect a positive impact (36%). It is important to note, however, that the potency of this impact is perceived to be “slight” rather than “significant.”
- Few demographic criteria allow a clear profile of those people who feel most negatively impacted by growth (past and future). Those more likely to feel growth has negatively impacted them have lived in the County for more than 10 years, own their home and those who farm. There is no noticeable regional variation.
- Those most positively impacted by growth (past and future) are similarly hard to distinguish demographically, although younger respondents (under 34), males, and those who do not own a farm are more likely to report a positive impact.



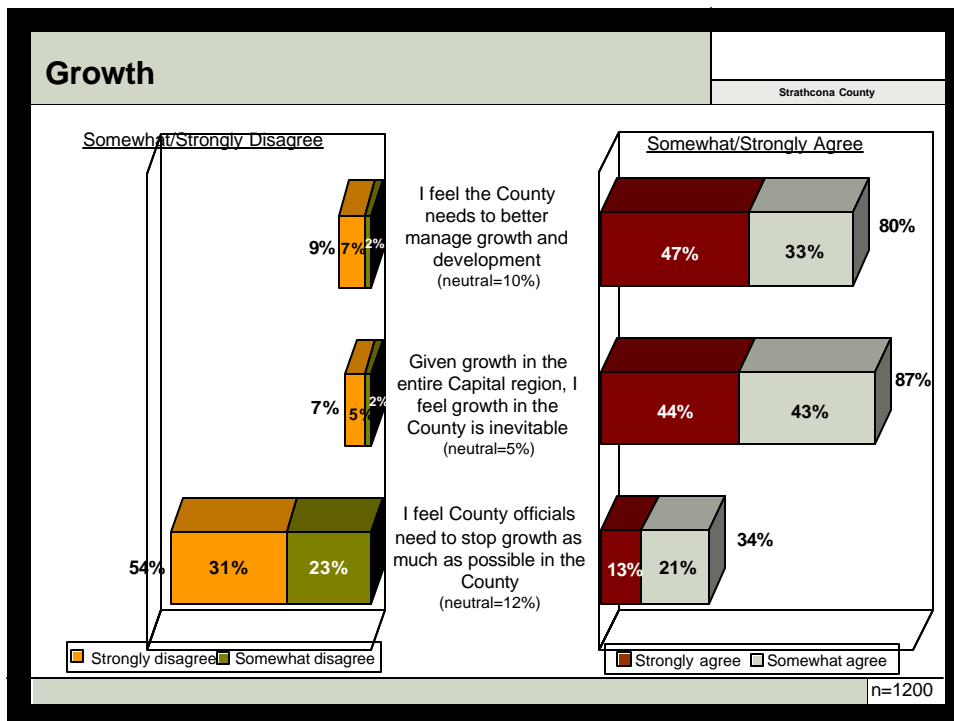


Still thinking about growth, to what extent do you agree or disagree with the follow statements?

- A strong majority of survey respondents agree that growth is inevitable given the growth in the Capital region as a whole (87%), and that the County needs to better manage growth and development (80%). Nearly half of those who agree the County needs to better manage growth and development feel strongly about this (47% strongly agreeing with this statement).
- However, only one-third (34%) agrees County officials need to stop growth as much as possible. Focus group results may help shed some light on this apparently incongruous result.

First, focus group respondents were at odds with regard to whether or not County officials could stop growth, even if they tried. Second, as noted in focus groups and supported by the quantitative results outlined already in this section, there is not so much of a call to stop growth in the County but to better manage growth and, for some people, to slow down the rate of growth from the perceptibly rapid tempo of the last few years.

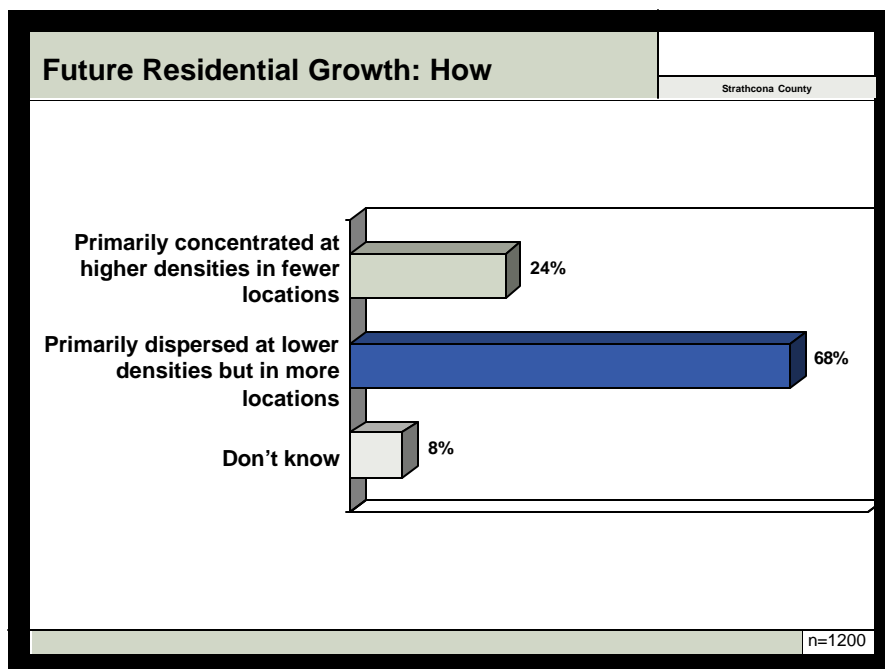
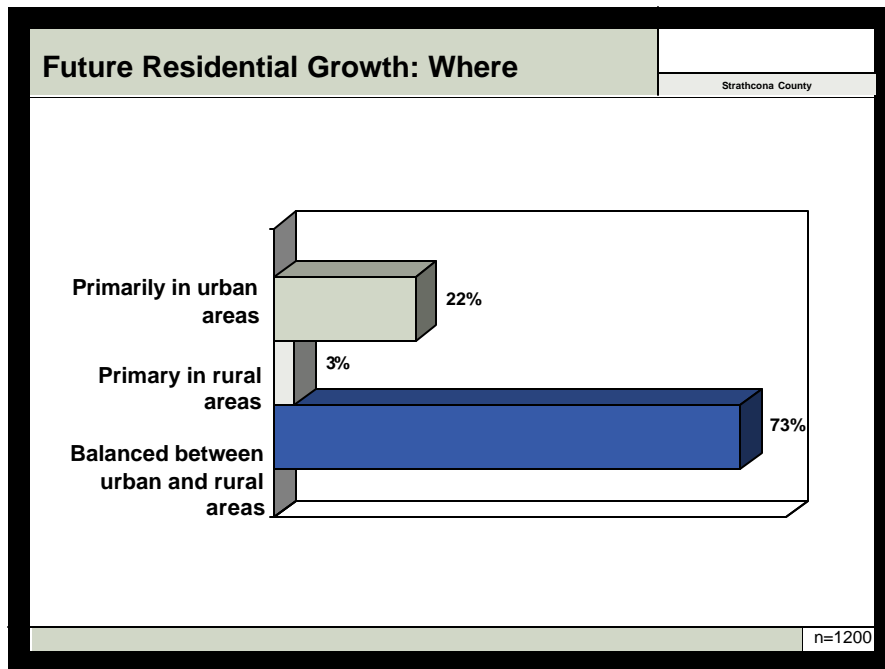
In sum, residents surveyed are not against growth even though there exists a solid core reporting a negative impact on them. They are overwhelmed by its speed, concerned about the changes it is bringing to their community and worried about how to manage growth in the future. To be fair, there is also a solid core of citizens who recognize the positive impacts of growth and wish to see growth continue. The point of commonality between these two groups is the consensus around the need to better manage and plan anticipated growth into the future.



Future Residential Growth: Location and Form

Which of the following statements describes your preference for where any future residential growth occurs in the County?

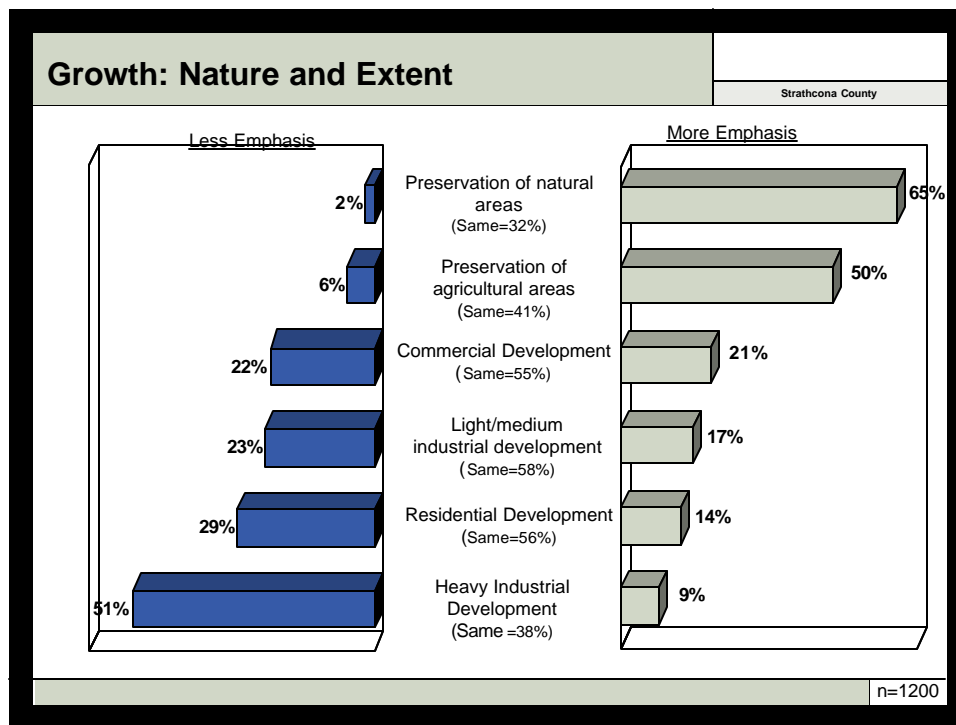
- Residents surveyed are quite clear in their preferences for future residential growth: It should be balanced between urban and rural areas and be primarily dispersed at lower densities but in more locations.



Nature of Future Growth

Thinking about the nature of any future growth over the next 10 years, do you think the County should place more, less or about the same emphasis as now on the following areas of development?

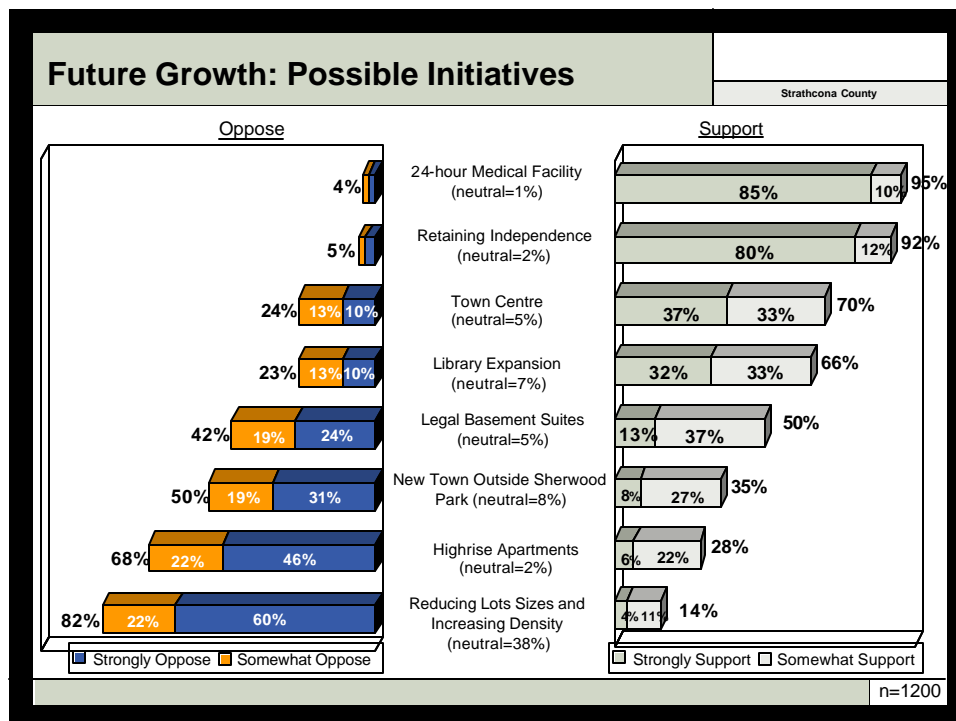
- A majority of survey respondents clearly identify the preservation of natural areas and agricultural areas as needing more emphasis in future growth plans. This is consistent with the desired County priorities of protecting the environment and maintaining trees, green spaces and other natural areas (previously reported).
- Residents call for the status quo on commercial, light/medium industrial and residential development with just over half of respondents calling for about the same emphasis as now on these areas of development.
- In contrast, a majority of respondents indicate the desire in future growth plans to provide less emphasis on heavy industrial development, although slightly more than one-third (38%) prefer about the same emphasis as there is now.



Future Growth: Reaction to Possible Initiatives

Thinking about future growth in the County, do you support or oppose the following possibilities?

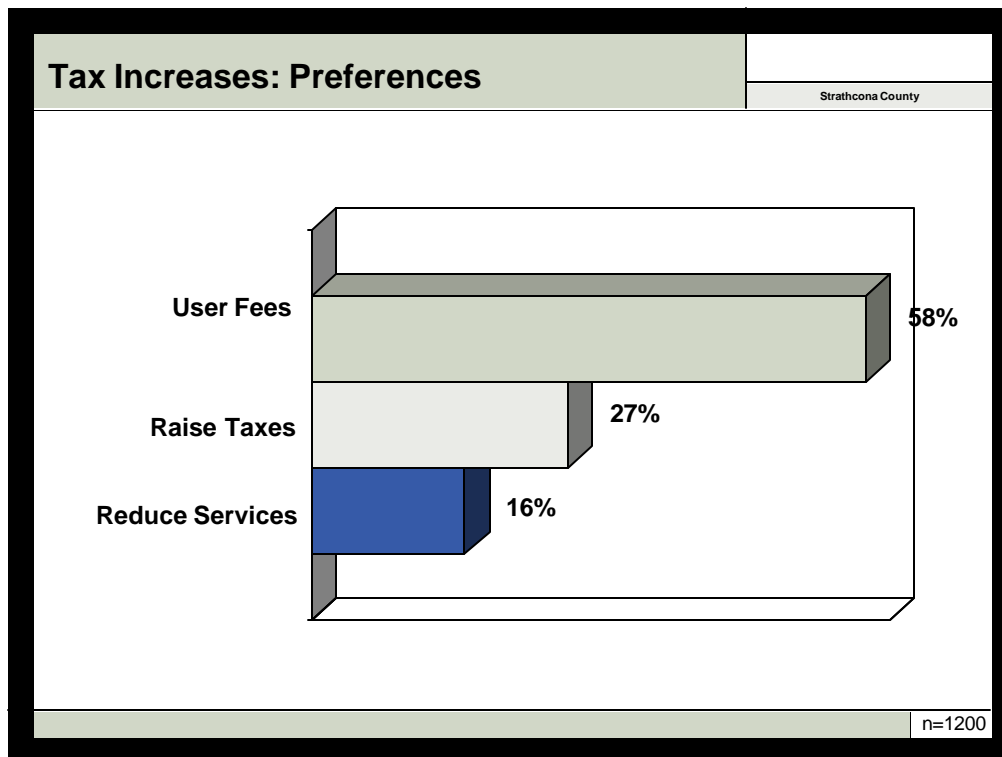
- A majority of respondents strongly supports the development of a 24-hour medical facility within Sherwood Park. Similarly, strong support is garnered for Strathcona County to retain its independence as a separate municipality.
- There is also a groundswell of support for the development of a town centre in Sherwood Park that serves as a focus point for shopping and community activity, and the relocation and expansion of the County Library.
- On the issue of allowing legal basement suites in residential neighbourhoods, respondents are divided with half (50%) showing tepid support and 42% opposing (and fairly strongly) this option. Support is strongest in the rural constituency, among women and for renters.
- Opposition outweighs support for the development of a new town outside of Sherwood Park (50% versus 35%).
- Survey respondents strongly oppose the reduction of lot sizes and the consequent increase in residential density. Opposition is also fairly strong for the development of high-rise apartment buildings in the County. These results are consistent with the earlier finding that respondents much prefer development to be dispersed at lower densities but in more locations.



3.7. Taxes

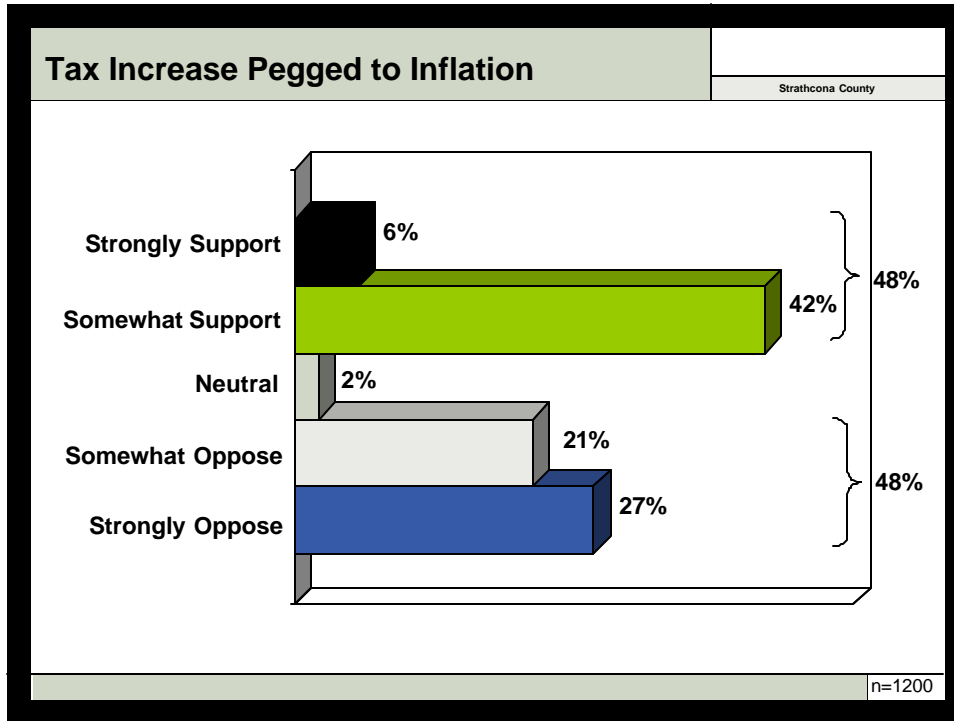
The cost of delivering municipal services today is higher than it was 10 year ago. To keep pace with cost increases, how should the County manage the increasing cost of services in the future? Given a choice, would you prefer to charge user fees for those who use the service, raise taxes or reduce services? (Paired comparisons).

- There is a clear preference by a two-to-one margin for the County to pay for future services through user fees levied against those who use the service. Raising taxes ranked second overall in terms of preference with service reductions placing in third and last position of the three options tested.



Do you support or oppose a property tax increase that matches inflation?

- Residents of the County are evenly divided on the issue of a property tax increase to keep pace with inflation.
- Opposition is strongest among homeowners, farmers and those aged 35-44 years.



3.8. County Governance

I'd like your opinion on how you feel the County governs. How would you rate the County on the following issues?

- Overall, the County scores well on a variety of governance issues. Topping the list is in providing good value for one's tax dollars. While half score the County good or very good in this area, a further one-third of residents rate the County as "fair."
- Providing appropriate enforcement of bylaws and communicating with its citizens ranked second and third overall with almost half rating the County good or very good and over one-third as fair.
- Over seven-in-ten residents rate the County as fair or better when it comes to: Effectively planning for the future; Providing input into the development of bylaws and other decisions; and, Providing opportunities for input into land use planning decisions. Although for each of these issues, just over one-third rates the County good or very good.
- At the bottom of the list, but still with over six-in-ten respondents giving the County a "fair" grade or better is Providing efficient processes to obtain development and building permits.

