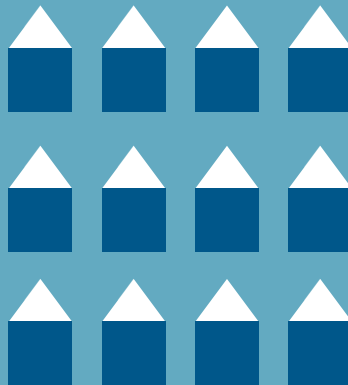


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HALIFAX INDEX 2018

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GOLD PARTNER MESSAGE

Nova Scotia native and internationally-acclaimed writer and speaker, Robin Sharma, speaks of change with an accuracy many of us can relate to. To paraphrase, he says that change is hard at the beginning, messy when you are in the middle of it, and rewarding once it is finally done.

The *Chronicle Herald*, the Halifax Partnership, and other organizations across Halifax and Nova Scotia that work to create a better future for the place we call home understand the messiness Sharma describes. The path to the future is by no means a straight line.

You cannot break apart old conventions, tear down outdated norms, build new ways forward or create something new, without making a mess. It is simply not possible. If you want to keep the apple cart upright and the boat from rocking, you can maintain order. If, however, you have visions of something new and better, you need to expect a few bumps in the road.

That is why, amidst the ups and downs of change, it is important to stop, reflect on progress made, and re-energize to move forward. That is why initiatives such as the *Halifax Index* are so important. By taking the pulse of our economy and city, the *Index* shows us where our efforts are working and fuels all of us to keep going.

This place is changing—you can feel it and, in these pages, you can see it. Some days it may feel messy, but with continued work and dedication, we are all being rewarded.



Mark Lever

President & CEO

The Halifax Herald Limited

**The
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Visit HalifaxIndex.com to download a copy of the *Halifax Index 2018*.

INTRODUCTION

Changes are afoot—in the Halifax economy and in the *Halifax Index 2018*.

Big news from the past year includes the opening of the Nova Centre, the near completion of the Big Lift re-decking work on the Macdonald Bridge, and the arrival of our first ultra-class container ship. The winning proposal for an Atlantic Canada-based Ocean Supercluster featured heavy involvement from Halifax businesses and institutions and it was another record year for international student enrolment. Intensive team effort also resulted in Halifax's bid submission for Amazon's second North American headquarters, which resulted in new collaborative relationships and profile-raising materials that put us in very good stead for the next big sales pitch opportunity to come our way.

This report features a numerical snapshot of the past year, including the *Halifax Economic Growth Plan 2016-21* checklist. While progress continues, certain stretch goals from the *Growth Plan* remain out of reach at the moment. That said, the act of pursuit continues to generate benefits of its own as we work, learn, build, and better sell the city.

Looking forward, work led by the Halifax Regional Municipality and United Way Halifax on poverty reduction soon will move from research and analysis to implementation, the Centre for Ocean Ventures & Entrepreneurship (COVE) is set to open in June, and the Action Plan for years 3-5 of the *Growth Plan* will be rolled out. Challenges include the continued aging of our population, uncertainty around international trading relationships, and the potential for additional interest rate hikes.

The *Index* has a new look and depth as well.

The availability of data from the 2016 census provides an opportunity to shed more light on aspects of life in Halifax, including a deeper understanding of distinctions among the many communities that comprise Halifax. Coverage of social factors like health, education, and poverty has been broadened and the analysis of rural Halifax has deepened.

Given the importance of attracting and retaining Halifax's talented workforce, this year's special analysis focuses on affordability.

We hope you will find the *Halifax Index 2018* useful and interesting, and we look forward to recounting another year's worth of progress and success again next year.



Ian Munro

Chief Economist
Halifax Partnership

HALIFAX ECONOMIC GROWTH PLAN 2016-21 CHECKLIST

All indicators are measured for the Halifax Census Metropolitan Area unless indicated otherwise.					
Goal	Measurement	Baseline	2016	2017	STATUS VS. BASELINE*
Promote & Maximize Growth	Grow Halifax's GDP to \$22.5 Billion Source: Conference Board of Canada, Metropolitan Outlook (Winter)	\$18.3 billion	\$18.6 billion	\$18.9 billion	Progressing
	• Increase average annual income growth Source: Conference Board of Canada, Metropolitan Outlook (Winter)	1.2%	1.5%	1.7%	Improving
	• Increase the total number of jobs Source: Statistics Canada, Labour Force Survey	224,100	226,000	224,600	Improving
	• Increase the share of full-time work Source: Statistics Canada, Labour Force Survey	83%	82%	81%	Worsening
	• Increase the share of businesses that consider Halifax an above-average place to do business Source: Corporate Research Associates, Business Confidence Survey	15%	23%	27%	Improving
	• Reduce commercial vacancy rates in the downtown Source: Cushman & Wakefield Atlantic, Office Marketbeat	14.3%	15.1%	19.6%	Worsening
	• Increase the commercial property tax base Source: HRM – Financial Policy and Planning	\$7.8 billion	\$8.2 billion	\$8.3 billion	Improving
Attract & Retain Talent	Grow Halifax's Labour Force to 271,000 Source: Statistics Canada, Labour Force Survey	239,100	240,700	241,000	Progressing
	• Increase Halifax's overall labour force growth Source: Statistics Canada, Labour Force Survey	+0.5%	+0.7%	+0.1%	Worsening
	• Increase net interprovincial migration of youth ages 20-29 to Nova Scotia Source: Statistics Canada, Annual Demographic Estimates	-1,300	-222	-231	Improving
	• Grow the international student body Source: Maritime Provinces Higher Education Commission	5,832	6,045	6,498	Improving
	- ...and the gross share that transition into permanent residency	3.4%	6.9%	9.4%	Improving
	• Increase net international immigration to Halifax Source: Statistics Canada, Annual Demographic Estimates	+2,085	+5,805	+4,544	Improving
Make Halifax a Better Place to Live & Work	Grow Halifax's Population to 470,000 Source: Statistics Canada, Annual Demographic Estimates	417,847	424,950	431,701	On Track
	• Increase Halifax's overall population growth Source: Statistics Canada, Annual Demographic Estimates	1.0%	1.9%	1.6%	Improving
	• Increase the share of Nova Scotians who have a strong or somewhat strong sense of belonging to their community Source: Statistics Canada, Canada Community Health Survey	76.4%	73.4%	~	Worsening
	• Raise the mean score on quality of life indicators Source: MQO Research, City Matters Survey	7.7	7.2	7.1	Worsening
	- Good place to raise a family	7.7	7.8	7.4	Worsening
	- Outdoor recreational facilities	7.3	6.8	6.9	Worsening
	- Indoor recreational facilities	7.2	6.8	6.8	Worsening
	- Housing affordability	6.1	5.7	5.5	Worsening
	- Arts and cultural events	7.4	6.8	7.0	Worsening
	- City is easy to get around	6.6	5.9	6.0	Worsening
	- % who feel mostly safe	61%	80%	80%	Improving
	• Increase library programming attendance Source: Halifax Regional Library	209,772	213,576	224,072	Improving
	- ...and in-person visits	3,595,902	3,613,986	3,618,317	Improving

**Growth Plan metrics with a specific numerical target for the year 2021—GDP, labour force, and population growth—are categorized as “On Track” if the current growth path leads to the target being reached or exceeded; “Progressing” if there is substantial positive growth, although not enough to reach the target; or “Not Progressing” if there is negligible or negative growth.*

All other items are assessed in terms of annual growth, but without specific targets. “Improving” denotes substantial improvement; “Unchanged” indicates that the most recent data are not considered to be substantially changed from the baseline year; and “Worsening” means there has been noticeable deterioration.

KEY FINDINGS

PEOPLE

- Halifax had its second straight year of strong population growth, growing by 1.6% from 424,950 to 431,701. This was greater than the national growth rate of 1.2% and third among our benchmark cities: St. John’s, Québec City, Kitchener-Cambridge-Waterloo (KCW), Regina, and Victoria.
- Immigration was the key driver of this growth with Halifax welcoming over 4,500 international migrants. The past two years have been the two best for immigration growth since amalgamation in 1996.

EDUCATION

- Among those ages 25 to 64 in Halifax, 70% have at least some post-secondary education, with 38% holding a university degree or certificate.
- International post-secondary enrolment hit its highest level ever in Halifax, reaching roughly 6,500 students.

ECONOMY

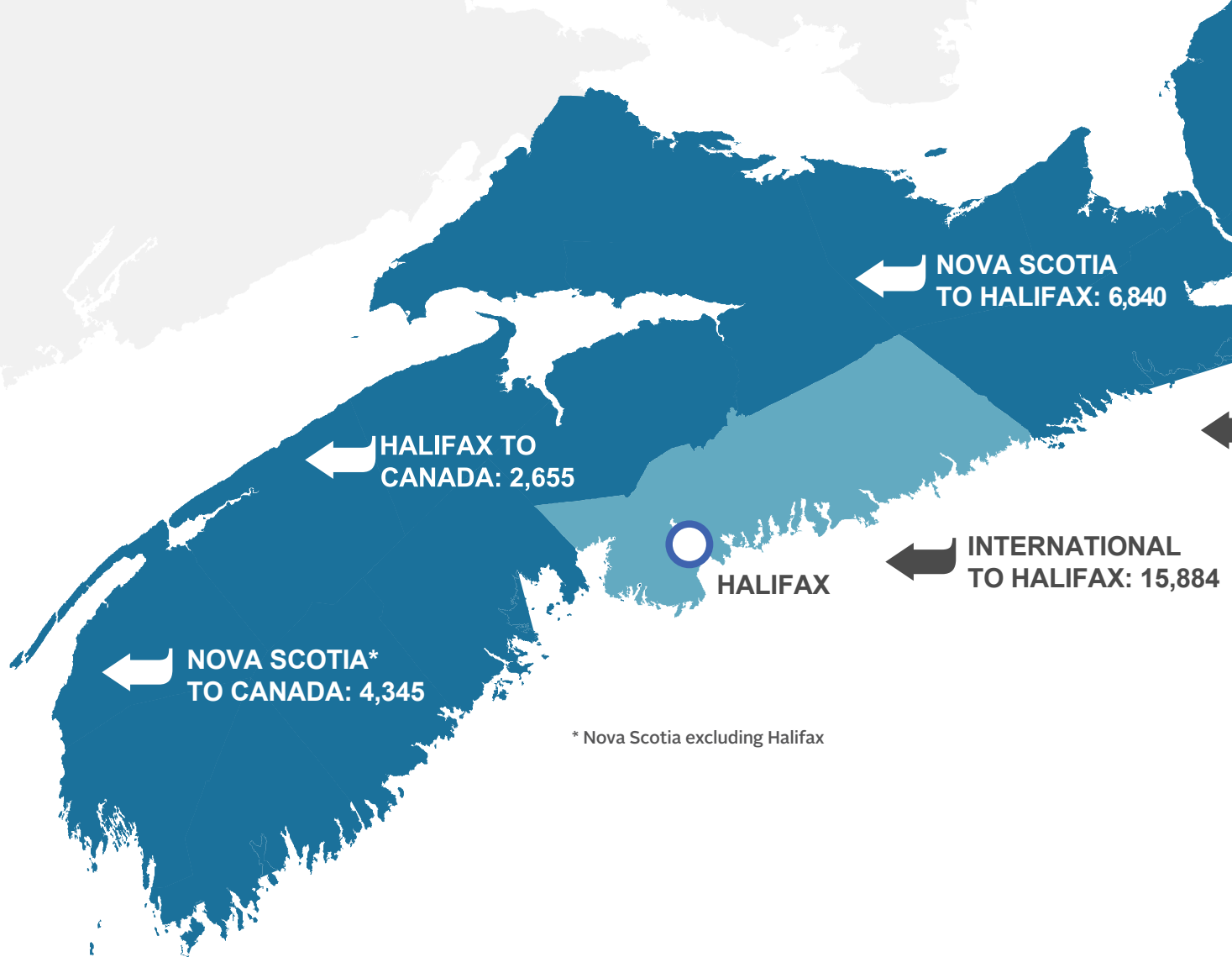
- Halifax’s GDP grew by 1.7% in 2017, below both the national figure and most of the benchmark cities.
- The Business Confidence Index for Halifax reached an all-time high in 2018, marking the fourth straight year of gains.

QUALITY OF PLACE

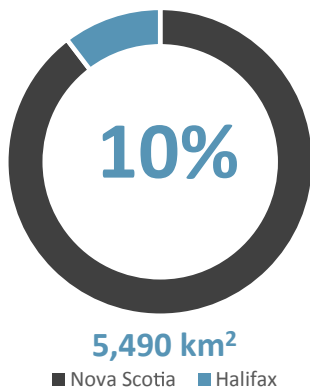
- The Crime Severity Index dropped again for Halifax.
- In comparison to benchmark cities, Halifax fares well in terms of the population’s participation in physical activity, but ranks poorly when it comes to good (fruit and vegetable) and bad (alcohol and tobacco) consumption.

HALIFAX PROFILE

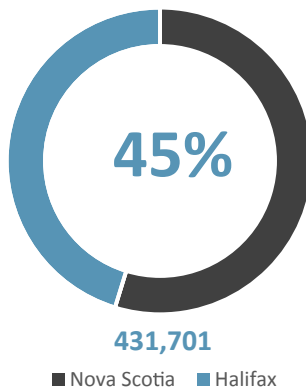
Total Net Migration Between Regions, 2012 to 2017



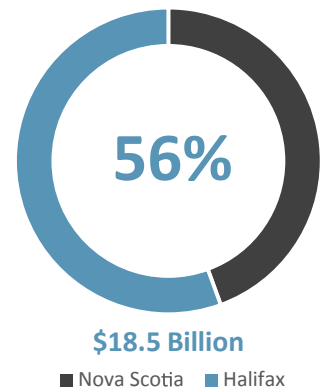
Land Area



Population

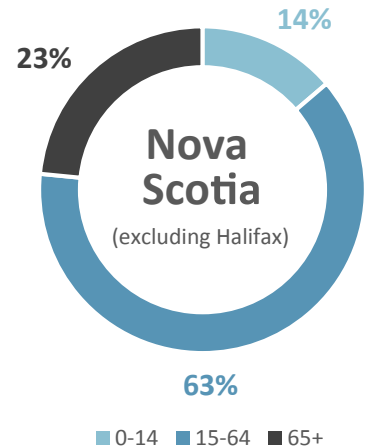
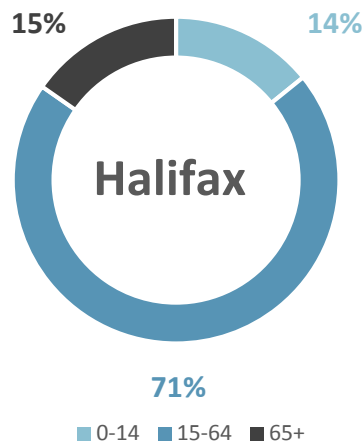


Gross Domestic Product (GDP)



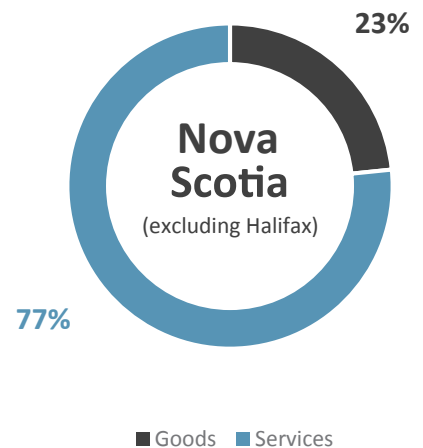
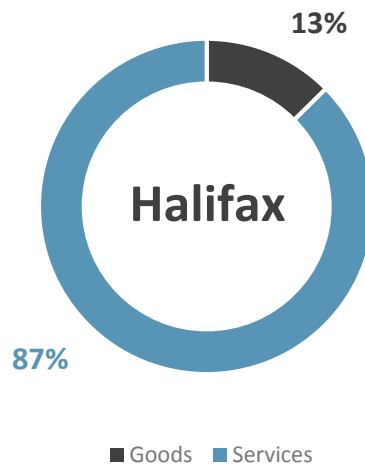


Age Distribution

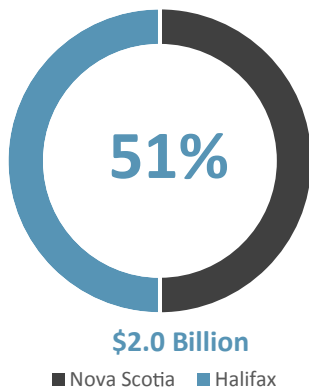


INTERNATIONAL TO
NOVA SCOTIA*: 3,783

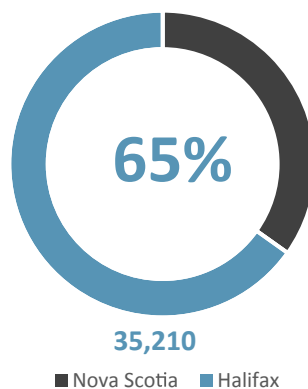
Employment by Sector



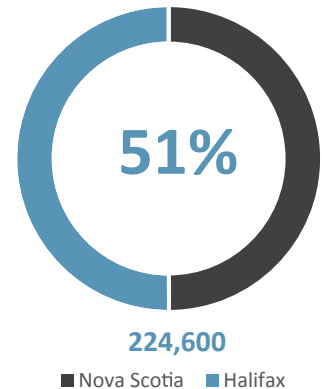
Major Project Spending



Post-Secondary Students



Employment



PEOPLE

KEY INDICATORS

POPULATION

- Population estimates
- Population growth
- Migration by origin

DEMOGRAPHICS

- Select communities
- Age demographics

LABOUR AND EMPLOYMENT

- Labour force participation
- Unemployment by age group

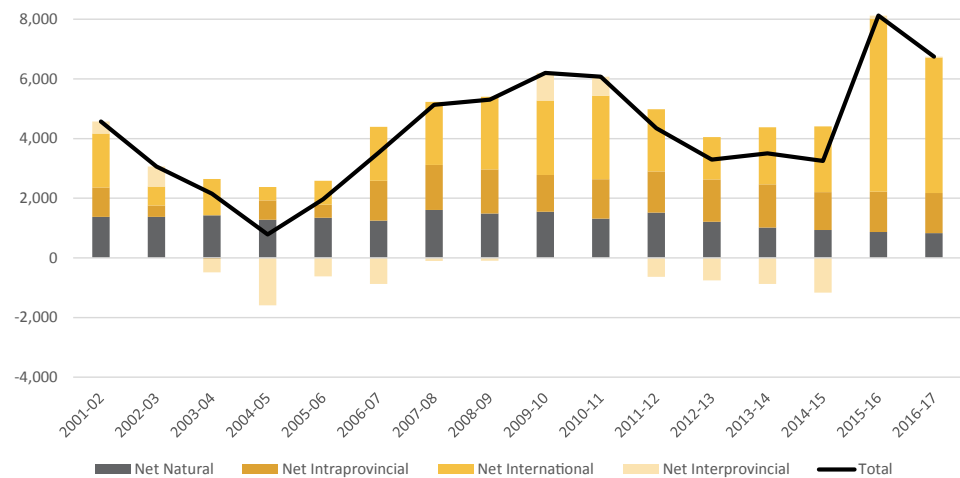
WORKPLACE SAFETY

- Registered injury claims
- Time-loss claims
- Weeks of short-term disability

POPULATION

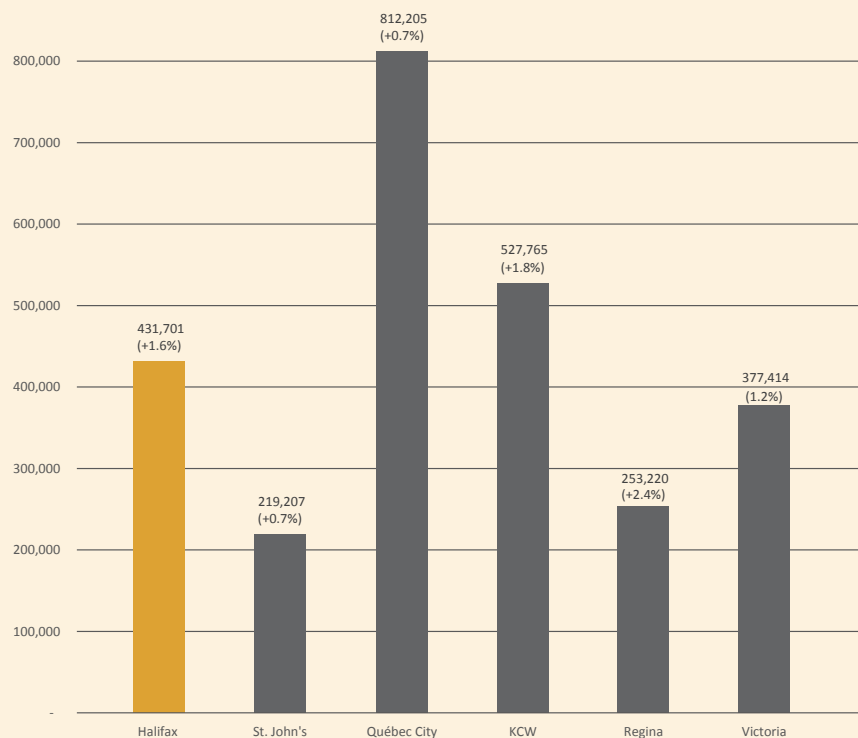
Strong population growth continued in 2017. Halifax experienced a 1.6% population increase, from 424,950 to 431,701, over the period July 2016 to June 2017. This follows record population growth in 2016 and is the second largest year-over-year growth in the past decade. Immigration continues to be the main driver, accounting for almost 90% of the city's net population growth. Halifax's natural population growth—the number of births minus the number of deaths—declined for the fifth consecutive year, reaching the lowest level of the millennium. Last year did, however, see the first increase in births in seven years.

FIGURE 1: Historical Population Growth by Source
Halifax, 2001 to 2017



Source: Statistics Canada, Annual Demographic Estimates

FIGURE 2: Population Estimates and Annual Growth Rate
Benchmark Cities, 2017



Source: Statistics Canada, Annual Demographic Estimate

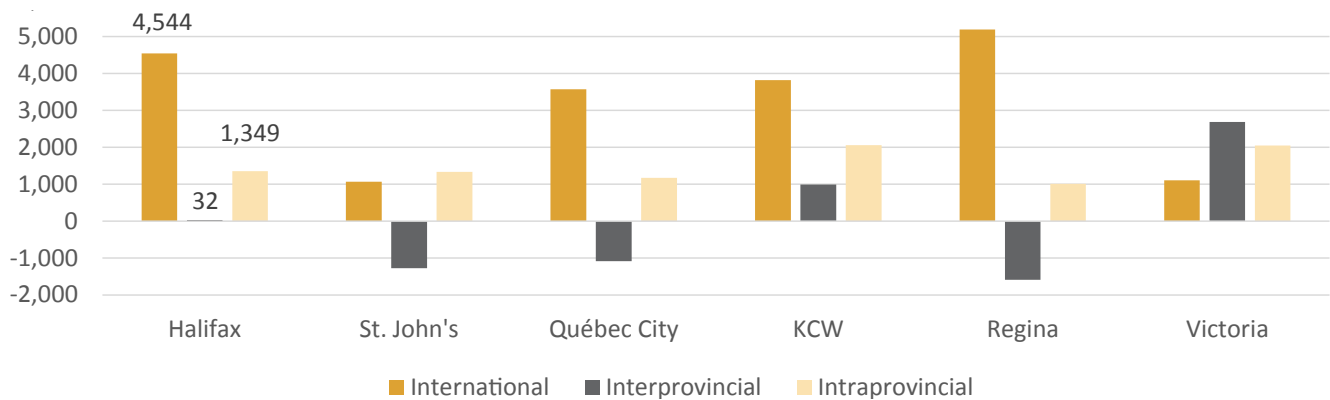
Halifax's population growth rate was higher than the national average and third among benchmark cities. Regina grew the fastest for the second straight year at 2.4%.

Halifax had the second highest number of net international migrants among benchmark cities. The approximately 4,500 newcomers who arrived between July 1, 2016 and June 30, 2017, follows an influx of over 5,800 migrants during the previous year. To put these figures into context, since 2001, the next-best year for net international migration was 2010-11 when 2,800 immigrants arrived.

Halifax's intraprovincial migration—the net number of people moving into Halifax from elsewhere in Nova Scotia—in 2017 was consistent with the previous decade during which an average of 1,377 people moved here from other counties. This number has been quite steady, hovering in approximately the 1,200 to 1,500 range during this period. While the net interprovincial migration figure for Halifax was small, it was positive for the second straight year following four consecutive years of net interprovincial outmigration.

FIGURE 3: Net Migration by Source

Benchmark Cities, 2016-17



Source: Statistics Canada, Annual Demographic Estimates

DEMOGRAPHICS

Two broad trends distinguish Halifax's demographic evolution.

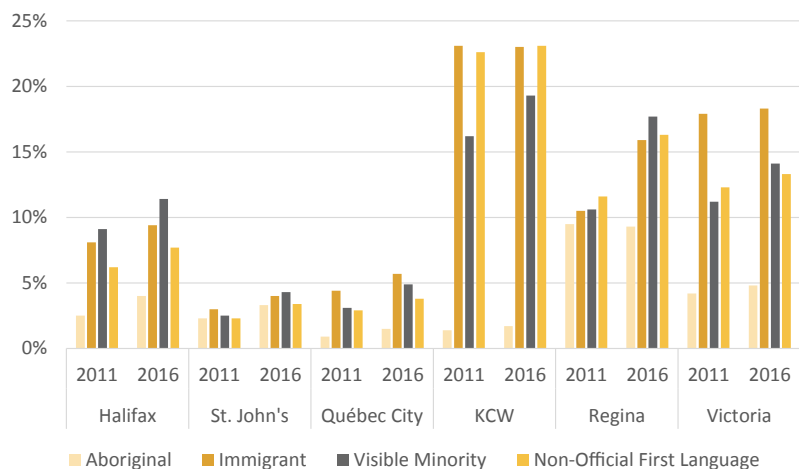
First, Halifax is getting older. From 2011 to 2016, the median age in Halifax climbed from 39.9 years to 41.0 years, and the proportion of the population ages 65 and older jumped from 13.1% to 15.7%.

Second, Halifax's population has become increasingly diverse. For instance, the proportion of the population for whom English or French is not a first language has risen from 6.2% in 2011 to 7.7% in 2016.

Over the same period, the immigrant share of Halifax's population has climbed from 8.1% to 9.4%. Halifax's visible minority population has increased from 9.1% to 11.4%, while the share of Halifax residents identifying as Aboriginal has increased from 2.5% to 4.0%. The increase of those identifying as Aboriginal may be in part a function of recent changes to the legal definition of Métis.

FIGURE 4: Select Communities as a Share of Population

Benchmark Cities, 2011 and 2016



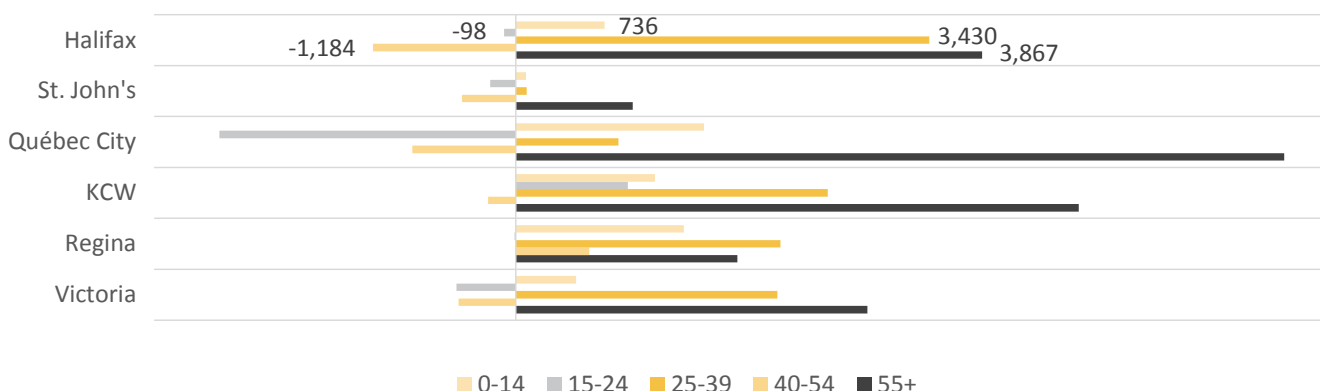
Sources: Statistics Canada, 2016 Census of Canada, 2011 Census of Canada, and 2011 National Household Survey

Despite these increases, Halifax remains less diverse than several comparator cities. Kitchener-Cambridge-Waterloo (KCW) and Regina, for example, have more than double Halifax's shares of immigrant and Aboriginal populations, respectively. Looking more closely at age, Figure 5 shows that the largest population increases in Halifax last year occurred in the 25 to 39 and 55+ age cohorts, with more modest growth in the 0 to 14 group, a small decrease in the age 15 to 24 bracket, and a large decline in the number

of those ages 40 to 54. The large and continuing increase in the 55+ category is consistent with the general trend of population aging that is now occurring in our region. The substantial increase within the prime age group for establishing careers and families (25 to 39) and the relatively small decrease in the age 15 to 24 cohort compared to previous years are very positive signs that may reflect goals to improve youth retention and attract working-age immigrants.

FIGURE 5: Population Change by Age Group

Benchmark Cities, 2016-17

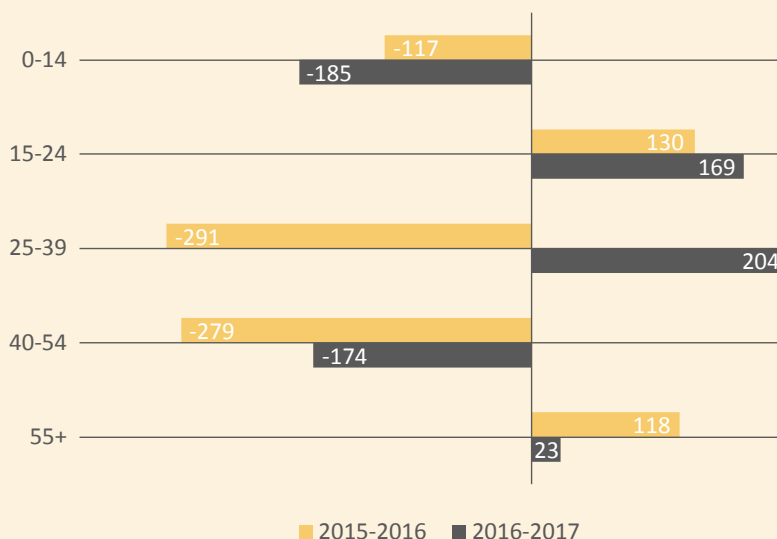


Source: Statistics Canada, Annual Demographic Estimates

Given long-standing concerns about the loss of our youth to central and western Canada, it is interesting to look at the age profile of those moving between Halifax and other provinces. Positive and improving figures for the 15 to 24 age group and a significant turnaround from negative to positive in the 25 to 39 cohort are welcome developments.

FIGURE 6: Net Interprovincial Migration by Age Group

Halifax, 2015 to 2017



Source: Statistics Canada, Annual Demographic Estimates

LABOUR AND EMPLOYMENT

Halifax's labour force grew by only 0.1% in 2017, below the national average of 1.1%, and second lowest among benchmark cities. St. John's, in last place, was the only city to have a decrease in its labour force.

The labour force participation rate—the percentage of the population ages 15 and older who are in the workforce—continues to decline in Halifax, dropping from 68.0% in 2016 to 67.1% in 2017.

The Halifax labour force also continues to grow older. From 2013 to 2017, the number of those ages 65+ increased by 2,200, while the percentage of the labour force that is 65 and older grew from 3.0% to 3.9%. The participation rate for those 65+ climbed during the same period from 13.8% to 14.5%. Therefore, the concerns over an aging population and its impact on the labour force in aggregate are at least partially offset by increased labour force attachment within the 65+ cohort. It is not clear the extent to which this latter trend is driven by choice (e.g. a desire to stay active and connected) or by necessity (e.g. working income is required to alleviate financial concerns).

Halifax experienced a small decrease in employment of 0.7% in 2017. Full-time employment, however, decreased significantly by 2,900 jobs, while there was a gain of 1,500 part-time jobs.

The unemployment rate in Halifax increased between 2016 and 2017 from 6.1% to 6.8%. Halifax's unemployment rate was above the national average of 6.3% and higher than all benchmark cities with the exception of St. John's. Halifax's youth unemployment rate (ages 15 to 24) also increased to 16.1%, the highest rate in 20 years, and perhaps surprisingly was larger than in St. John's and Calgary, two cities that are continuing to recover from the decline in oil prices. Among the major cities listed in Figure 8, Halifax has the highest ratio

of youth unemployment rate to overall unemployment rate. The Conference Board of Canada predicts employment growth to rise in Halifax from 1.1% in 2018 to 1.5% in 2019, then fall back closer to 1.0% from 2020 through 2022. From 2018 to 2022, it predicts the unemployment rate to drop steadily from 6.7% to 5.6%. The Halifax Partnership's Business Confidence Survey, conducted in March 2018 by Corporate Research Associates, shows that two-thirds of the businesses interviewed expect to hire additional staff in the coming year, while only 8% plan to reduce staff.

FIGURE 7: Labour Force Participation Rate
Halifax, Population Ages 15 and Older, 2001 to 2017

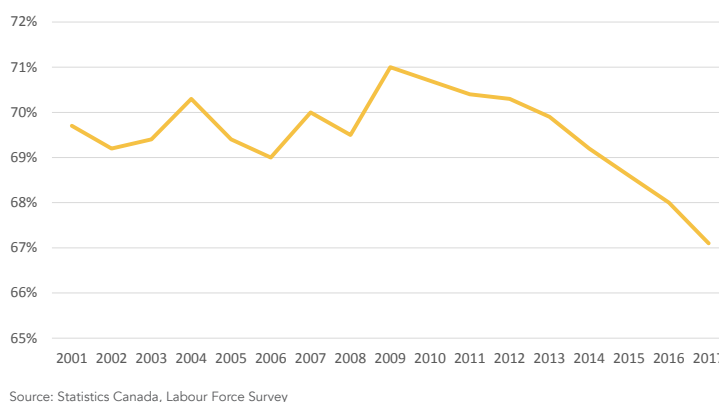
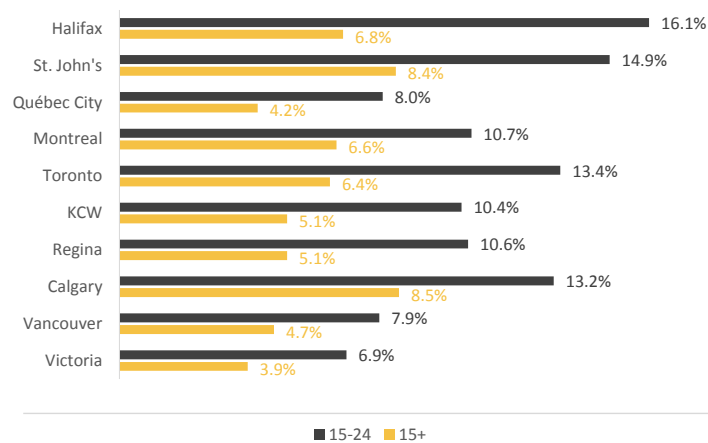


FIGURE 8: Unemployment Rate by Age Group
Benchmark and Other Major Cities,
Population Ages 15 and Older, 2017

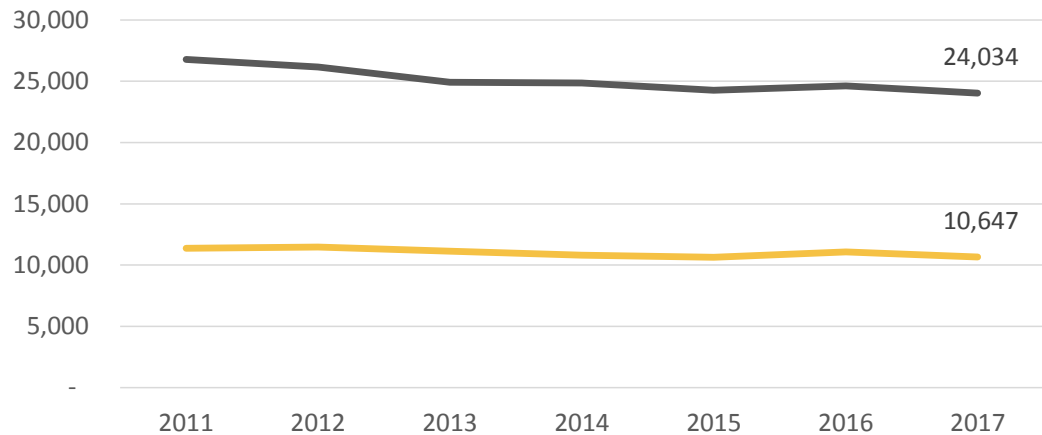


WORKPLACE SAFETY

Halifax and Nova Scotia both saw a small decrease in the number of registered injury claims in 2017.

Registered injury claims declined by 3.8% to 10,647 in Halifax and by 2.4% to 24,034 across Nova Scotia.

FIGURE 9: Registered Injury Claims by Geography
Halifax and Nova Scotia, 2011 to 2017



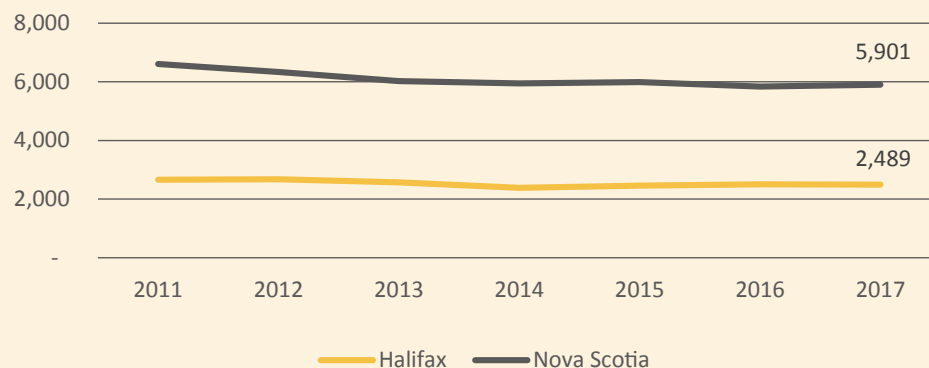
Source: Workers' Compensation Board of Nova Scotia — Halifax — Nova Scotia

Time-loss injury claims across Nova Scotia increased from 5,839 to 5,901 in 2017, but fell slightly from 2,508 to 2,489 in Halifax. Those who were injured were off work for longer, however. This is the third consecutive year that there has

been an increase in the average weeks of paid leave in Nova Scotia, with an average time-loss claim for 2017 of 7.5 weeks. The average weeks of paid leave due to time-loss claims in Halifax increased from 6.5 weeks to 6.6 weeks.

FIGURE 10: Time-Loss Injury Claims by Geography

Halifax and Nova Scotia, 2011 to 2017



Source: Workers' Compensation Board of Nova Scotia

The 2018 Business Confidence Survey found that 76% of businesses surveyed felt that Halifax's workplace safety culture was an advantage, with only 9% citing it as a disadvantage.



EDUCATION

KEY INDICATORS

POST-SECONDARY INSTITUTIONS

- University and NSCC enrolments
- Enrolment by field of study

ELEMENTARY AND SECONDARY SCHOOLS

- P-12 reading
- P-12 writing
- P-12 math scores

POST-SECONDARY INSTITUTIONS

The post-secondary education sector is a critical component of Halifax's economy. Access to a skilled workforce is a top priority for businesses. The stream of talented young people graduating from our institutions is a key selling point in attracting investment to the city, as are the opportunities for collaboration with the many experts conducting research in our schools. Furthermore, Halifax is an educator to the world, drawing students from around the globe.

Halifax has one of the highest post-secondary attainment rates in Canada: 70% of those ages 25 to 64 have at least some post-secondary education, and 38% of this age group hold a university degree or certificate. Halifax is in the top five among Canada's 35 census metropolitan areas in terms of population percentage with a bachelor's degree or higher, and population percentage with a degree or certificate from a college or university.

Changes in educational attainment across Halifax's population are presented in Table 1.

Declining numbers of people with no certificate, diploma, or degree and increasing numbers with college diplomas and university degrees are positive developments from a labour force perspective. Given that successive generations have become increasingly well-educated over the past several decades, these broad trends are expected to continue as older people with less education age out of the 25 to 64 group.

The most striking changes are the large increases in the numbers of females with university degrees at both the bachelor's and graduate levels and the relative levels of growth in attaining university degrees between females and males.

TABLE 1: Growth in Population by Highest Education Attained

Halifax, Ages 25 to 64, 2011 to 2016

	Total	Male	Female
No certificate, diploma, or degree	-2,750	-970	-1,780
Secondary (high) school diploma or equivalency certificate	4,025	2,725	1,290
Post-secondary certificate, diploma, or degree	1,460	70	1,390
Apprenticeship or trades certificate or diploma	-5,220	-2,455	-2,765
College, CEGEP, or other non-university certificate or diploma	5,405	2,685	2,720
University certificate or diploma below bachelor level	-4,725	-1,985	-2,750
University certificate, diploma, or degree at bachelor level or above	5,995	1,820	4,180
• Bachelor's degree	5,525	1,730	3,790
• University certificate, diploma, or degree above bachelor level	470	85	385

Source: Statistics Canada, 2016 Census of Canada, 2011 National Household Survey

Nova Scotia Community College (NSCC) enrolment numbers declined slightly to 10,837 in 2017. The Metro area campuses (Akerley, Ivany, and the Institute of Technology) experienced a decline of 321 Canadian students, but saw international enrolments increase by 136. University enrolment trends in Halifax also tell two disparate stories.

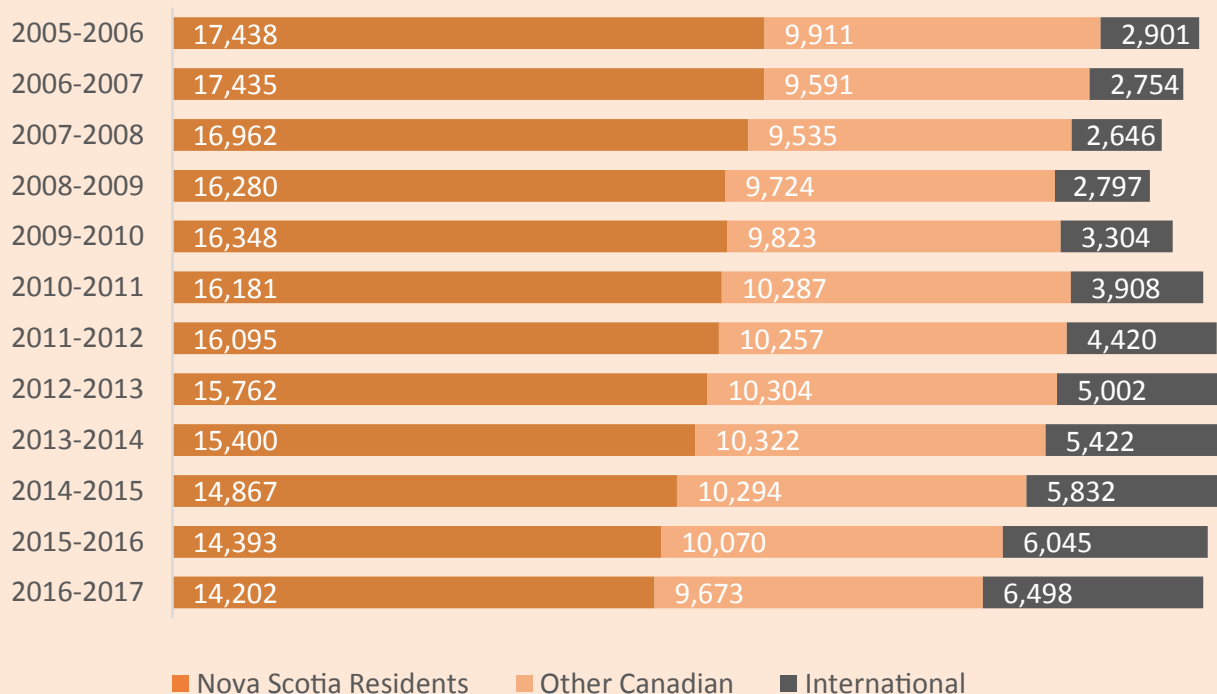
Enrolment of students from Nova Scotia and other Canadian provinces in Halifax universities declined for the sixth straight year. This trend will likely continue in

tandem with declining enrolments in Nova Scotia high schools. Compared to 2005-06, Halifax universities have 3,236 fewer enrolments from Nova Scotia residents. This is an average decline of 2.1% per year.

However, international enrolment continues to increase, growing by an average of 7.6% since 2005. Programs such as the Atlantic Immigration Pilot, which make it easier for graduating foreign students to stay in Canada, should help entice even more students to attend Halifax schools.

FIGURE 11: University Enrolments by Student Origin

Halifax, Full- and Part-Time Students, 2005 to 2017



Source: Maritime Provinces Higher Education Commission, Enrolment Data

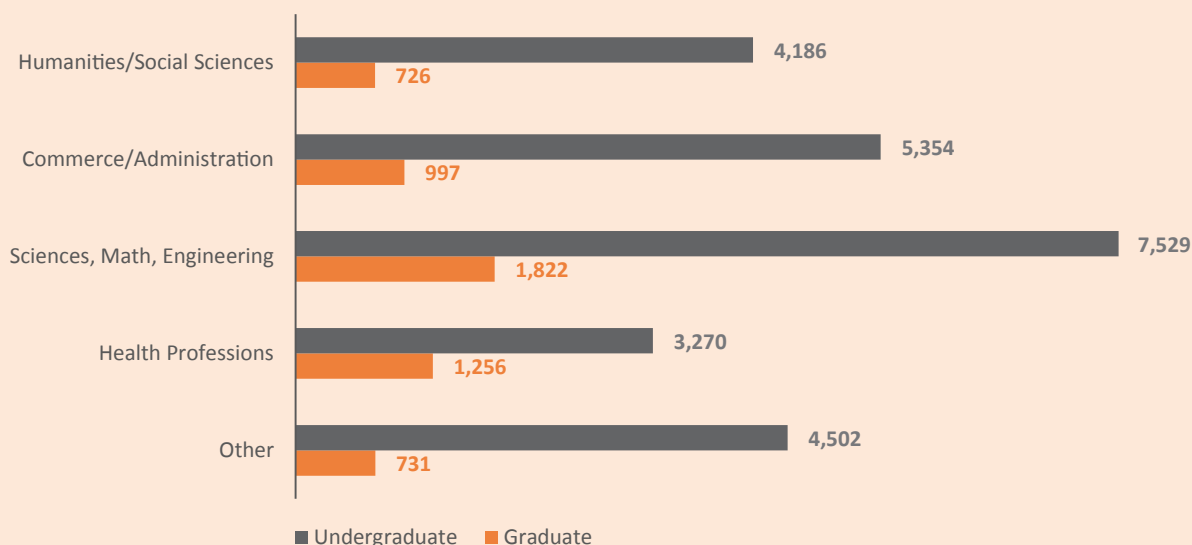
Turning from the number of students to the subjects they are studying, enrolments by field of study were largely stable in 2016-17, the biggest exception being undergraduate humanities/social sciences, which dropped by 450 enrolments (10%) from 2015-16. The largest increase was a 5% jump in enrolment in science, engineering, and math at the graduate level.

Several innovative programs have recently been added to the curricula of Halifax's post-secondary institutions. Dalhousie University bolstered its Master of Applied Computer Science program with entrepreneurial classes relevant to the tech industry

and created a Certificate in FinTech that focuses on innovative technology, specializing in blockchain and cryptocurrencies. Saint Mary's University developed the Master of Technology Entrepreneurship & Innovation (MTEI) and Master of Science in Computing & Data Analytics (MSc CDA) programs to directly fill the demand of technology companies looking for innovative thinkers, technology experts, and graduates with an entrepreneurial spirit. NSCC offers six IT diploma programs such as Data Analytics, Database Administration, and Programming, and an advanced diploma in Business Intelligence Analytics.

FIGURE 12: University Enrolments by Program Type and Level

Halifax, Full- and Part-Time Students, 2016-17



Source: Maritime Provinces Higher Education Commission, Enrolment Data

ELEMENTARY AND SECONDARY SCHOOLS (P-12)

Halifax's success in the near term is linked to the quality of our post-secondary institutions and the talented young workers graduating from them. The pipeline for our longer term success is our elementary and secondary (P-12) school system.

The Halifax Regional Centre for Education, formerly the Halifax Regional School Board, provides data for a variety of student assessments in reading, writing, and mathematics across several grade levels, although consistent annual long-term data does not exist.

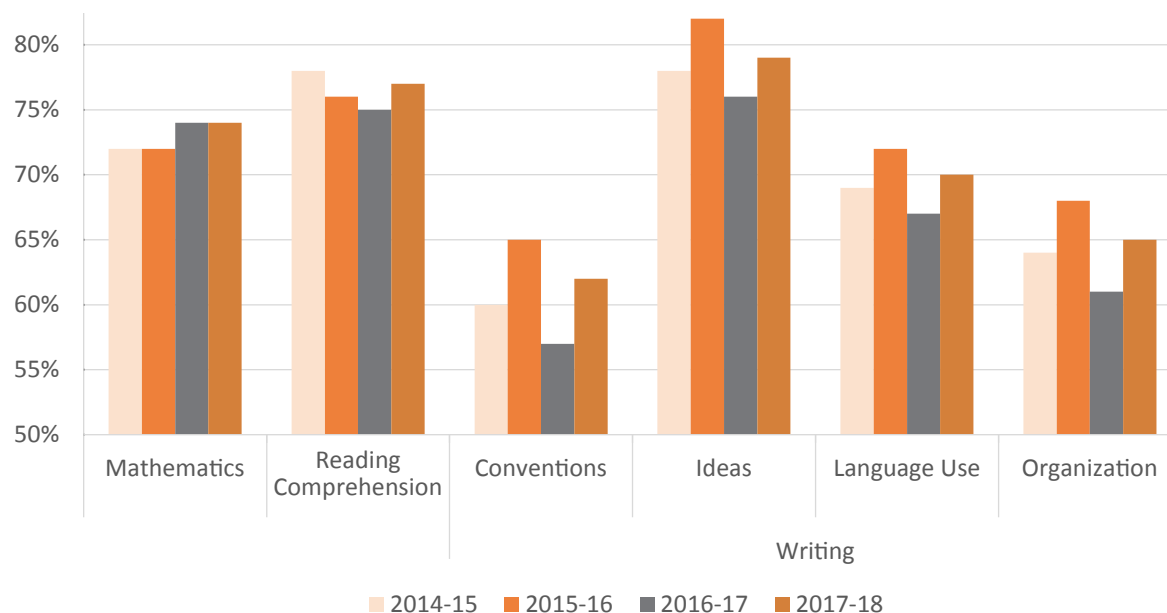
One means of examining performance trends in our P-12 public school system is to look at how scores at a particular grade level have changed over time.

Figure 13 shows the percentage of grade six students who were assessed as being at or above expectation in various subjects over the period 2014-15 through 2017-18. Scores for mathematics and for all four dimensions of writing were higher in 2017-18 than in 2014-15. Mathematics shows a general trend of improvement over the four years, whereas the writing scores featured up-and-down swings from year to year. Reading comprehension declined from 2014-15 through 2016-17, but then rebounded in 2017-18.

In 2017-18, more than one-quarter of students were below expectation in mathematics and more than one-fifth were below the standard for reading comprehension. The percentages of students below expectation in the four writing categories ranged from 21% to 38%.

FIGURE 13: Share of Grade 6 Students At or Above Expectation by Subject

Halifax, 2014 to 2018



Source: Halifax Regional Centre for Education

Another interesting exercise is to examine differences across grade levels at a fixed point in time. The most recent year to provide a wide-ranging data set is 2015-16.

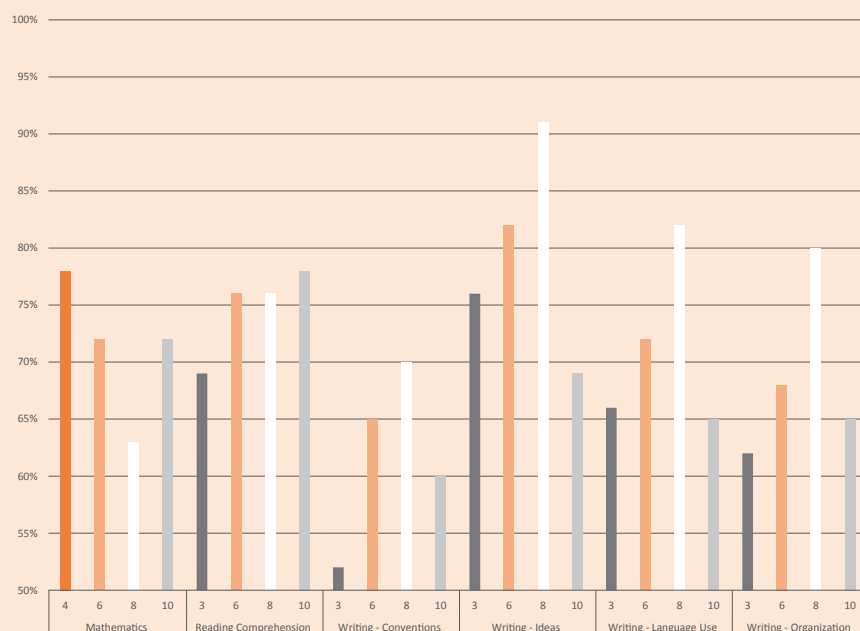
A consistent pattern appears in the writing domains: From grade three to six and in grade eight, the share of students meeting or exceeding expectations climbs steadily, only to drop off sharply for grade 10 students.

The figures for reading comprehension tell a different story, as cumulative experience appears to lead to better results for the older students.

Mathematics scores seem to dip from elementary into junior high and then rebound in senior high. Even after this rebound though, more than one-quarter of students score below expectation.

FIGURE 14: Share of Students At or Above Expectation by Subject and Grade

Halifax, 2015-16



Source: Halifax Regional Centre for Education

Also of interest is how we compare to other jurisdictions in terms of student competencies.

The Pan-Canadian Assessment Program (PCAP) describes itself as “a collaborative project that provides data on student achievement in Canadian provinces and territories” and “part of the ongoing commitment of the Council of Ministers of Education, Canada (CMEC) to inform Canadians about how well their education systems are meeting the needs of students and society”.

The PCAP assesses grade 8 students every three years on their achievement of expectations in reading, mathematics, and science. The most recent data comes from the PCAP report of 2016. Scores are presented on a standardized scale from zero to 1,000 with the scale midpoint of 500 equal to the pan-Canadian average for each subject in the baseline year—2007 for reading, 2010 for mathematics, and 2013 for science.

In all three domains, the mean achievement score in Nova Scotia is below the mean score for Canada as a whole and the differences are statistically significant. Nova Scotia ranks sixth among provinces in both reading and mathematics and eighth in science.

The 2016 PCAP had a special focus on reading. In Nova Scotia, 12% of students scored in the top level (Level 3) for reading, while 73% scored at Level 2, which is the baseline or expected level, and 15% had scores that put them in Level 1. This compares to Canada-wide percentages of 14%, 74%, and 12% for the three levels, respectively.

Nova Scotia’s reading score of 498 in 2016 was an improvement over the 2013 and 2010 figures of 488 and 489, respectively. Mathematics scores also have improved, growing from 474 in 2010 to 488 in 2013 and then 497 in 2016. Science scores are available only for 2013 and 2016. Here too there was improvement with the mean score rising from 492 to 499.

TABLE 2: Student Achievement Scores by Subject

Provinces, Mean Achievement of Curricular Expectations, 2016

Jurisdiction	Reading		Mathematics		Science	
	Mean Achievement Score	Provincial Rank	Mean Achievement Score	Provincial Rank	Mean Achievement Score	Provincial Rank
BC	509	4	494	7	505	5
AB	510	3	505	3	518	1
SK	491	7	483	9	491	9
MB	487	10	479	10	491	9
ON	512	2	508	2	510	3
QC	503	5	541	1	507	4
NB	489	9	498	5	500	7
NS	498	6	497	6	499	8
PE	513	1	503	4	516	2
NL	491	7	490	8	501	6
Canada	507	NA	511	NA	508	NA

Source: Council of Ministers of Education – Canada, Pan-Canadian Assessment Program (2016)

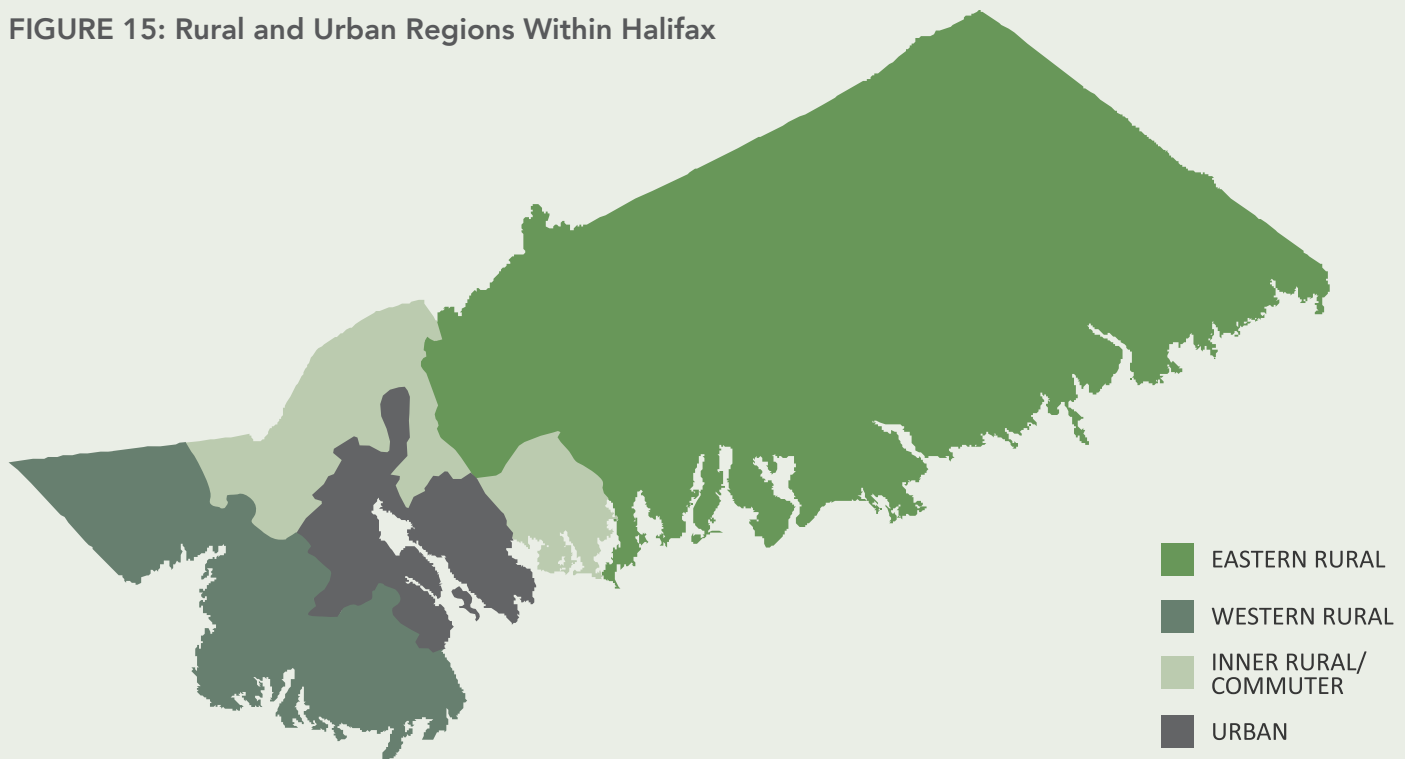
Nova Scotia continues to underperform compared to the Canadian average in reading, mathematics, and science, and is around the middle of the pack when compared to other provinces in each of these three subjects. However, Nova Scotia has seen steady improvements across all disciplines.

ANALYSIS: RURAL HALIFAX

Although Halifax is a provincial capital, a regional centre for business and public services, one of Canada's major cities, and an international gateway, it also has the largest rural population of any county in Nova Scotia. Additionally, one in five of the municipality's people live in rural communities.

For analytical purposes, aggregations of census tracts are used to define three rural areas: an Inner Rural/Commuter area plus Eastern and Western Rural areas, as shown in Figure 15.

FIGURE 15: Rural and Urban Regions Within Halifax



Source: Halifax Partnership

This proximity between a vibrant urban core and rural areas that offer inexpensive real estate, a wealth of recreational opportunities, and the feel of small-town living provides a tremendous advantage for attracting both businesses and people to Halifax. The rural-urban blend presents some

challenges though, as issues and policy priorities may be quite different across these divisions. Now that data from the 2016 census are available, Halifax's rural areas can be profiled in detail across several dimensions.

POPULATION

Just as there are some key distinctions between Urban and Rural Halifax, so too are there differences within the rural portion of the municipality. From 2011 to 2016, the population of Rural Halifax actually grew at a higher rate than did Urban Halifax, resulting in a slight increase in the rural share of the population. However, the rural increase

was concentrated in the rapidly growing Inner Rural area, whereas population growth in the Western Rural area was below the growth rate for the municipality overall, and the population of the Eastern Rural area contracted over the 2011 to 2016 period.

TABLE 3: Population and Dwelling Statistics

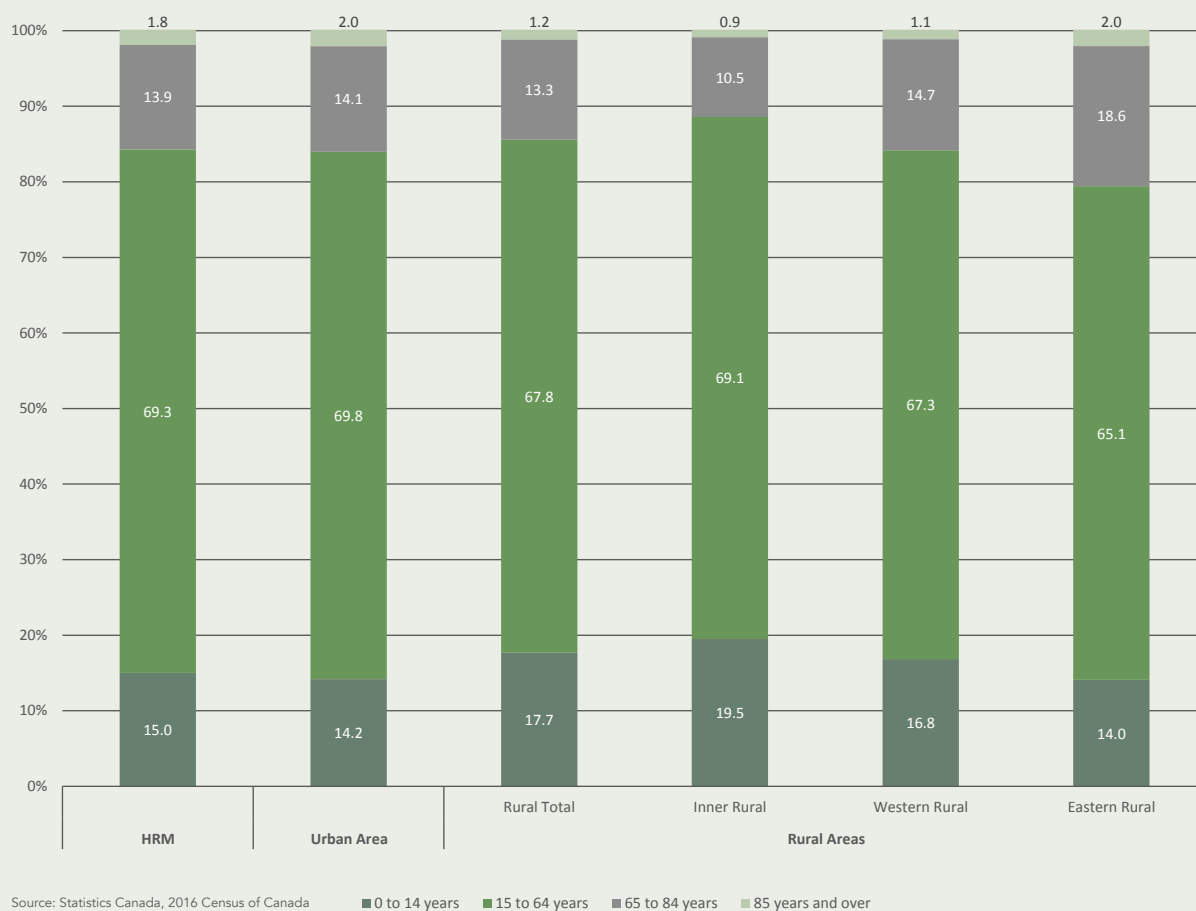
Regions Within Halifax, 2011 to 2016

	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
Population, 2016	403,390	308,159	95,231	50,833	25,209	19,189
HRM Population Share, 2016	100.0%	76.4%	23.6%	12.6%	6.2%	4.8%
Population, 2011	390,328	298,535	91,793	47,791	24,474	19,528
HRM Population Share, 2011	100.0%	76.5%	23.5%	12.2%	6.3%	5.0%
Population percentage change, 2011 to 2016	3.3%	3.2%	3.7%	6.4%	3.0%	-1.7%
Total private dwellings	187,478	147,470	40,008	18,859	10,921	10,228
Population density per square kilometre	73.4	844.5	18.6	87.8	32.9	5.1
Land area in square kilometres	5,496	365	5,131	579	768	3,785

Source: Statistics Canada, 2016 Census of Canada

FIGURE 16: Age Groups as a Share of Population

Regions Within Halifax, 2016



Differences also are apparent in the age profiles of these areas. Compared to urban Halifax, the Eastern Rural area stands out for having a lower proportion of youth and a higher proportion of the elderly, while the converse is true in the Inner Rural area. All three rural areas have lower shares of working-age population compared to Urban Halifax.

The average ages for Rural and Urban Halifax are almost identical at 40.9 and 40.8 years, respectively. The average age for the Inner Rural area is lower at 38.9 years, while the Western Rural (42.0 years) and Eastern Rural (44.9 years) areas are older on average.

In terms of population diversity, Urban Halifax has larger shares of immigrants and of those who identify as members of a visible minority, in general, and who identify as Black, specifically. In all geographies included in Table 4, Black is the most common selection for visible minority self-identification except for the Western Rural area where the most common answer was Chinese (0.6%). The Aboriginal population share is greater in the rural areas than in Urban Halifax.

TABLE 4: Select Communities as a Share of Population

Regions Within Halifax, 2016

	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
Aboriginal	4.0%	3.8%	4.5%	4.3%	3.9%	5.7%
Immigrant	9.4%	10.7%	5.2%	5.4%	6.0%	3.2%
Visible Minority	11.4%	13.5%	4.7%	7.4%	1.9%	1.4%
Black	3.8%	4.2%	2.6%	4.4%	0.5%	0.7%

Source: Statistics Canada, 2016 Census of Canada

INCOME

Average income statistics are generally higher in the Inner Rural and Western Rural areas, but lower in the Eastern Rural area as compared to Urban Halifax. The exception is average income from government transfers, where the relative positions are reversed. Lower levels of employment income and higher levels of government transfers in the Eastern Rural area are consistent with that region's older population profile.

TABLE 5: Average (Mean) Income Statistics

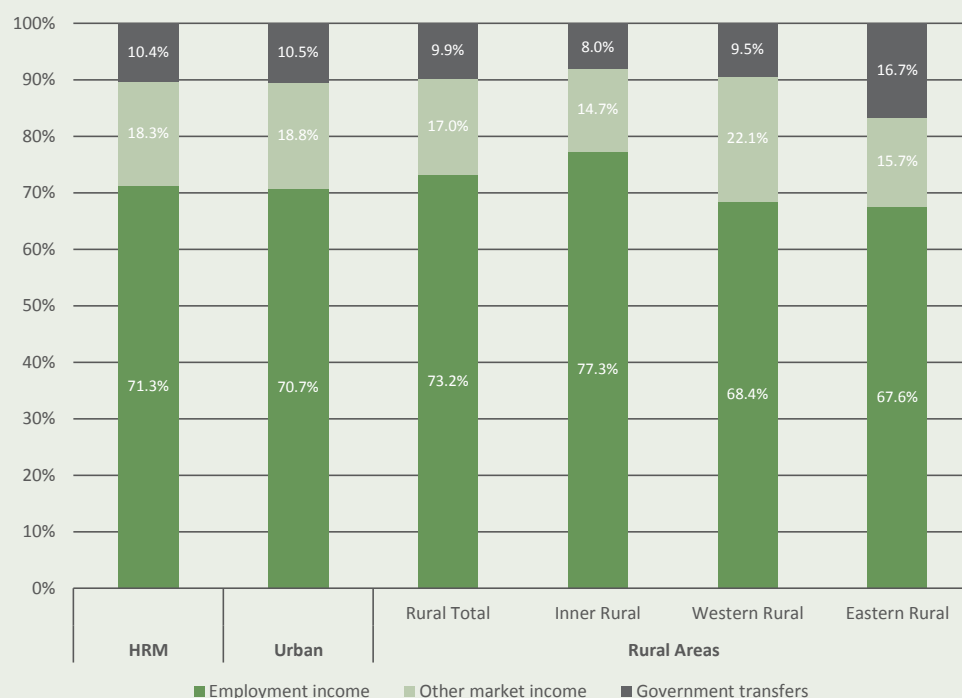
Regions Within Halifax, Income of Individuals, 2016

	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
Average total income in 2015 among recipients	\$46,429	\$45,387	\$49,966	\$52,770	\$52,548	\$39,798
Average after-tax income in 2015 among recipients	\$37,502	\$36,771	\$39,981	\$41,838	\$41,802	\$33,102
Average market income in 2015 among recipients	\$45,940	\$44,911	\$49,410	\$52,428	\$51,603	\$38,464
Average government transfers in 2015 among recipients	\$6,937	\$6,735	\$7,671	\$6,891	\$7,794	\$9,136
Average employment income in 2015 among recipients	\$44,079	\$42,939	\$47,838	\$51,010	\$47,727	\$38,971
Average employment income in 2015 for full-year full-time workers	\$61,471	\$60,471	\$64,568	\$67,155	\$65,393	\$54,717

Source: Statistics Canada, 2016 Census of Canada

FIGURE 17: Share of Income by Source

Regions Within Halifax, 2016

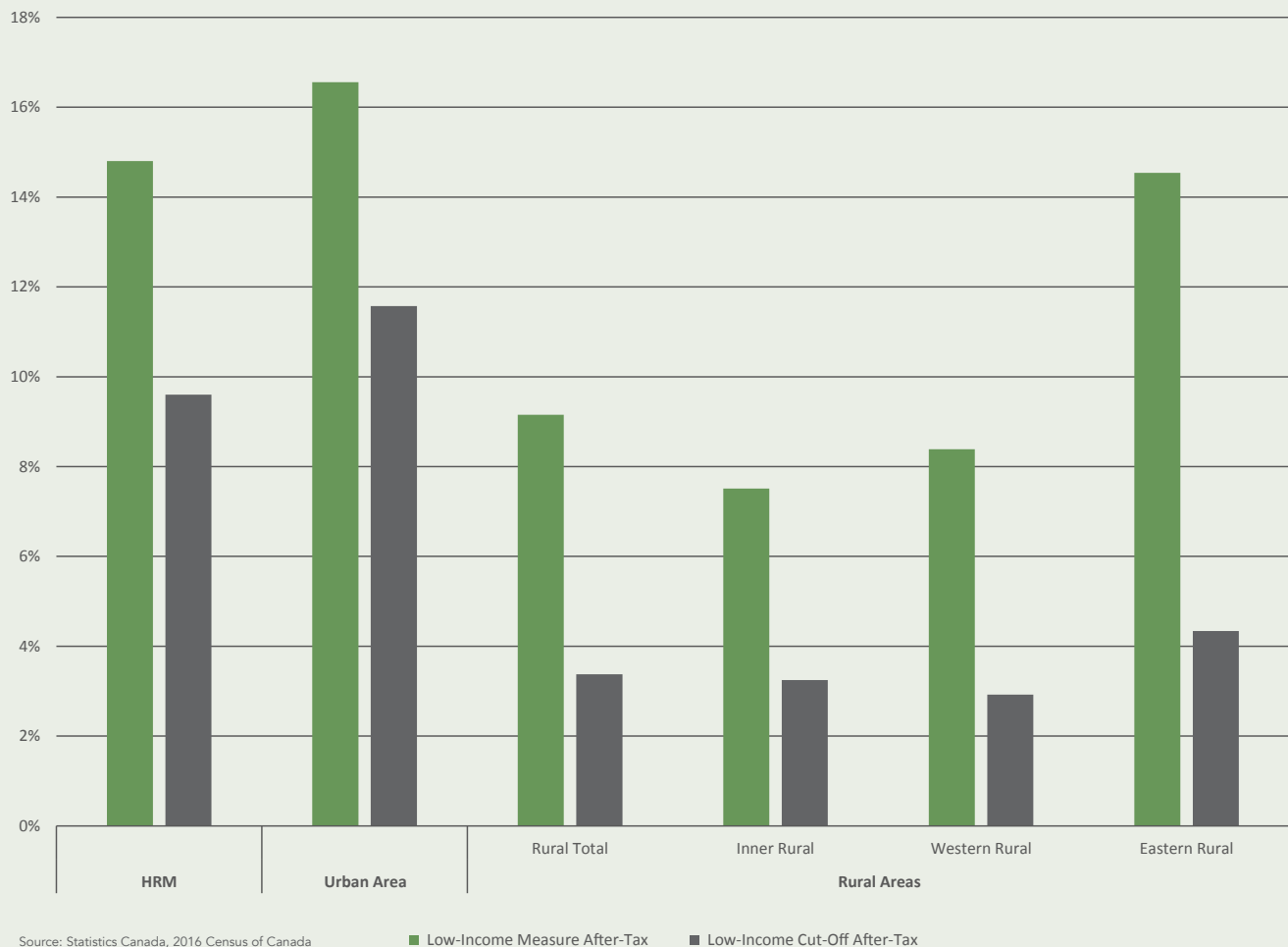


Source: Statistics Canada, 2016 Census of Canada

Figure 17 also shows the correlation between age and proportion of income earned from employment. The Inner Rural area has the lowest average age and highest percentage of income from employment, while the opposite holds true in the Eastern Rural area.

FIGURE 18: Share of Individuals Defined as Low-Income

Regions Within Halifax, Low-Income Measures of Household Income, 2016



Two figures often cited as proxies for poverty measures are the low-income measure (LIM) and the low-income cut-offs (LICO). These concepts are defined on page 47.

More households fall under both low-income thresholds in urban Halifax as compared to all rural areas. Among rural areas, the prevalence of low-income is similar in the Inner and Western areas, but substantially higher in the Eastern area.

EDUCATION

TABLE 6: Highest Education Attained as a Share of Population

Regions Within Halifax, Population Ages 25 to 64, 2016

	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
No certificate, diploma, or degree	8.4%	7.9%	9.7%	7.4%	9.2%	16.7%
Secondary (high) school diploma or equivalency certificate	22.0%	21.8%	22.5%	21.7%	21.5%	26.3%
Post-secondary certificate, diploma, or degree	69.6%	70.2%	67.7%	70.9%	69.4%	57.0%
Apprenticeship or trades certificate or diploma	8.2%	7.2%	11.3%	10.6%	11.6%	12.8%
College, CEGEP, or other non-university certificate or diploma	23.9%	22.9%	27.1%	27.7%	26.2%	26.8%
University certificate, diploma, or degree at bachelor level or above	35.2%	37.8%	26.9%	30.2%	29.5%	14.7%
Bachelor's degree	23.5%	25.1%	18.5%	21.1%	19.6%	10.1%
Master's degree	7.6%	8.2%	5.6%	5.9%	6.9%	3.0%
Degree in medicine, dentistry, veterinary medicine or optometry, or earned doctorate (PhD)	2.3%	2.6%	1.3%	1.5%	1.2%	0.6%

Source: Statistics Canada, 2016 Census of Canada

Post-secondary credentials, in general, and university degrees, specifically, including graduate degrees, are more common among the urban population than the rural population. The proportions of the population with only high school education or less are substantially higher in the Eastern Rural area.

LABOUR

Halifax has been experiencing a steady decline in its labour force participation rate—the percentage of the working-age population who are either working or looking for work—as its population grows older and more people transition to retirement. The same connection between population age and the participation rate can be seen in Table 7 as the Inner Rural area with its relatively young population has the highest participation rate and the older Eastern Rural area has the lowest. Rural Halifax overall has a lower unemployment rate than does Urban Halifax, but again there are significant variations among the different rural areas.

TABLE 7: Labour Force Statistics

Regions Within Halifax, Population Ages 25 to 64, 2016

	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
Participation rate	67.0%	66.7%	67.9%	71.3%	67.2%	60.7%
Unemployment rate	7.3%	7.5%	6.8%	6.6%	5.8%	8.7%

Source: Statistics Canada, 2016 Census of Canada

TABLE 8: Occupational Distribution of the Labour Force

Regions Within Halifax, National Occupation Classification (NOC), 2016

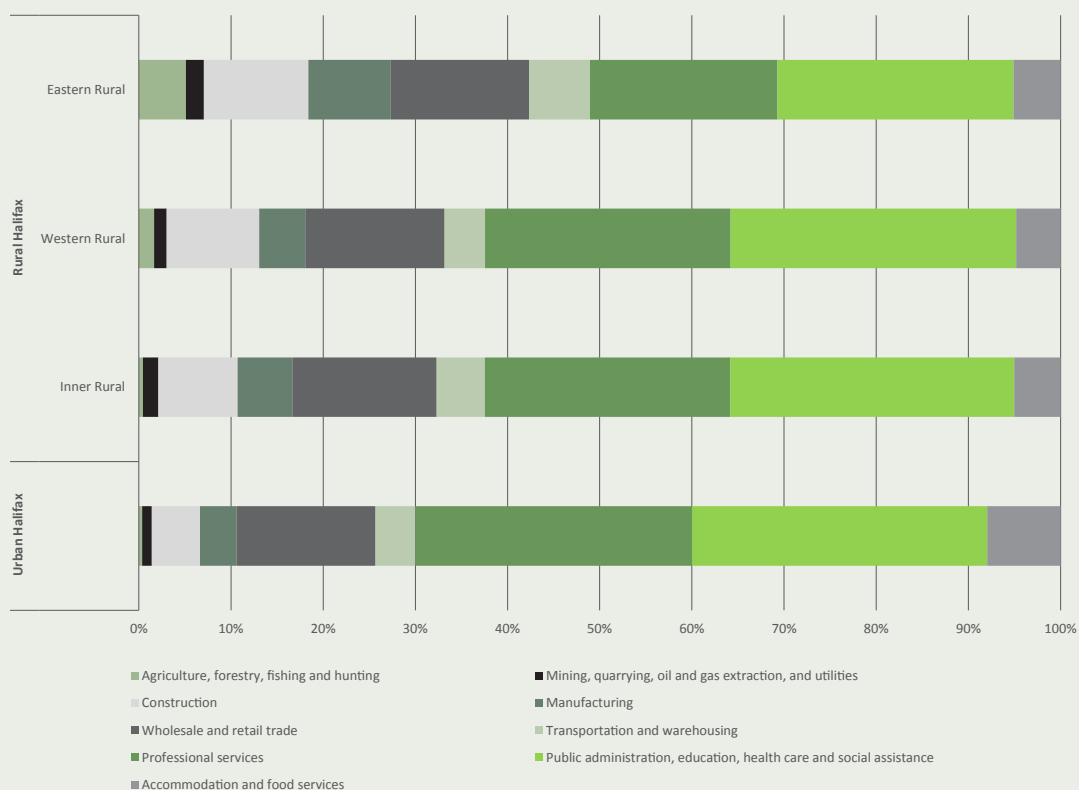
	HRM	Urban Area	Rural Areas			
			Rural Total	Inner Rural	Western Rural	Eastern Rural
0 Management occupations	11%	11%	12%	13%	12%	9%
1 Business, finance and administration occupations	17%	17%	16%	16%	16%	14%
2 Natural and applied sciences and related occupations	8%	8%	8%	9%	8%	5%
3 Health occupations	8%	8%	7%	8%	7%	7%
4 Occupations in education, law, social, community and government services	14%	14%	13%	13%	13%	10%
5 Occupations in art, culture, recreation and sport	3%	4%	3%	2%	3%	3%
6 Sales and service occupations	25%	26%	20%	21%	19%	20%
7 Trades, transport and equipment operators and related occupations	12%	10%	17%	15%	17%	22%
8 Natural resources, agriculture and related production occupations	1%	1%	2%	1%	2%	5%
9 Occupations in manufacturing and utilities	2%	2%	2%	2%	2%	4%

Source: Statistics Canada, 2016 Census of Canada

As would be expected, in rural areas the share of workers in occupations such as trades, transport, equipment operators, and natural resources and agriculture are higher, while service occupations are more common in Urban Halifax.

FIGURE 19: Share of Employment by Industry

Regions Within Halifax, NAICS Industries, 2016



Source: Statistics Canada, 2016 Census of Canada

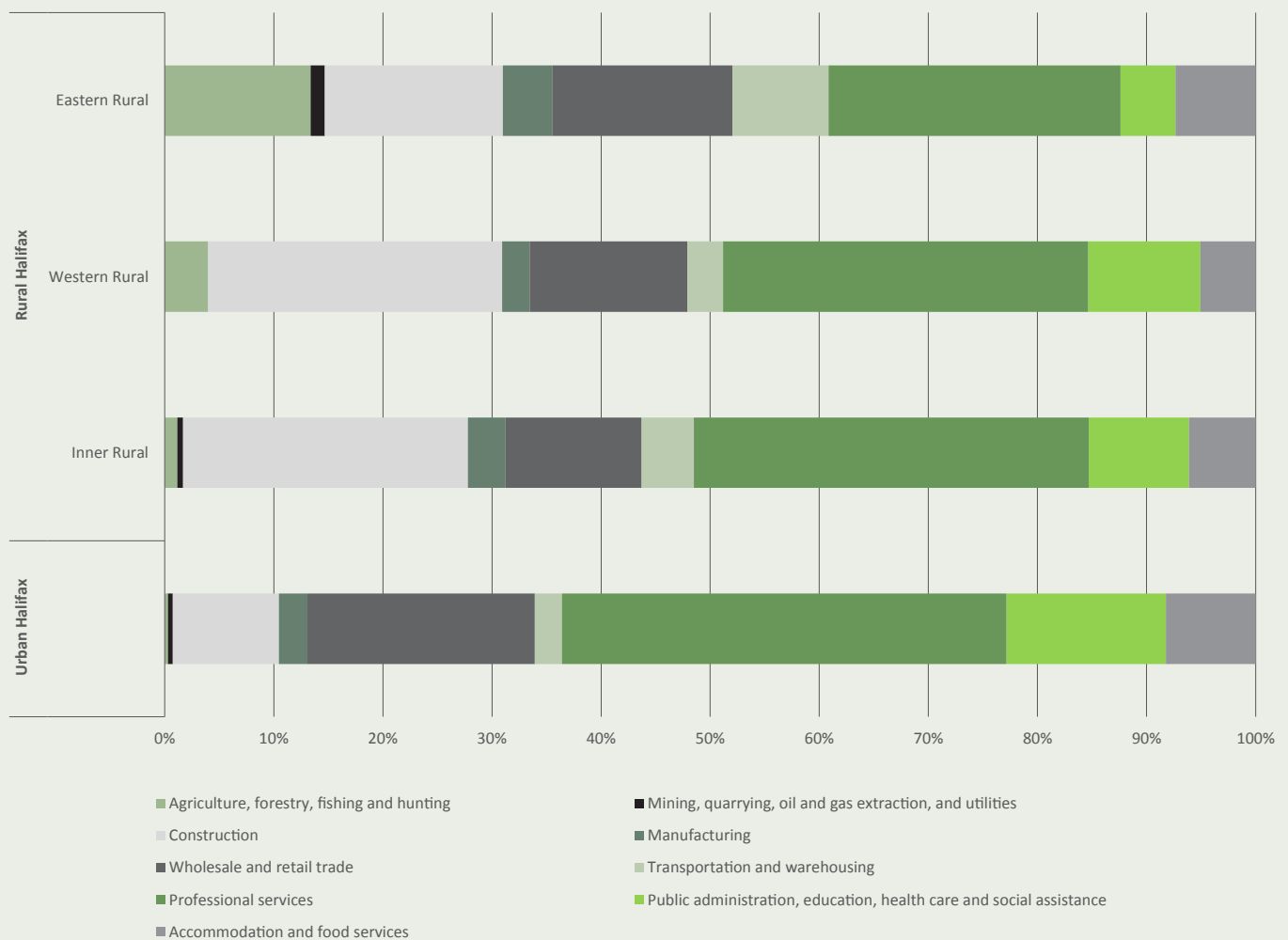
INDUSTRIAL STRUCTURE

Although the service sector is larger than the goods sector in terms of business location counts across both Rural and Urban Halifax, the goods sector is more prominent in rural areas, with large shares of businesses in construction and in the Eastern Rural area in agriculture, fishing, and forestry.

Employment by industry skews more heavily to the service sector, with professional services and public administration, education, and health care and social services dominating in all areas.

FIGURE 20: Share of Business Location Counts by Industry

Regions Within Halifax, NAICS Industries, 2017



Source: Statistics Canada, Business Location Counts (December 2017)



ECONOMY

KEY INDICATORS

INCOME AND SPENDING

- GDP growth
- GDP per capita
- Income per capita

KEY INDUSTRIES

- Employment by industry
- Wages by industry

INVESTMENT

- Residential starts and sales
- Office inventory and vacancies
- Investment in non-residential building construction

BUSINESS CONFIDENCE

- Purchasing power
- Rating of Halifax as a place to do business

HALIFAX GATEWAY

- People and cargo movement
- Total aircraft and ship movements

MUNICIPAL FINANCE

- Tax-supported debt
- Municipal revenue by source

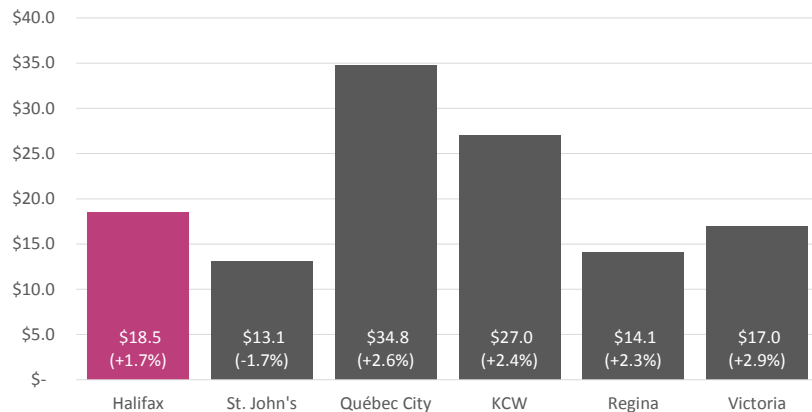
INCOME AND SPENDING

At the macroeconomic level, Halifax is estimated to have had positive but below-target GDP growth in 2017. The Conference Board of Canada estimates that the city's real GDP grew to \$18.5 billion in 2017 (in 2007 dollars), an increase of 1.7% over 2016. Halifax's GDP growth rate was lower than the national figure of 3.1% and the second lowest among benchmark cities. Halifax's modest GDP growth can be attributed to the completion of major projects such as the Big Lift refurbishment of the Macdonald Bridge and the construction of the Nova Centre. Halifax's forecasted GDP growth remains steady from 2018 to 2022 at an average of 1.8% per year.

Per capita income in Halifax increased by only 0.2% in 2017 to \$43,380, significantly lower than the Canadian average increase of 2.4%. Halifax ranked second last in per capita income growth among benchmark cities. St. John's, which has been struggling due to slowdowns in the energy sector, came last. The Conference Board of Canada predicts 1.9% per capita income growth for Halifax in 2018, followed by growth above the 2% level for each of the years from 2019 through 2022.

FIGURE 21: Real GDP Level and Annual Growth Rate

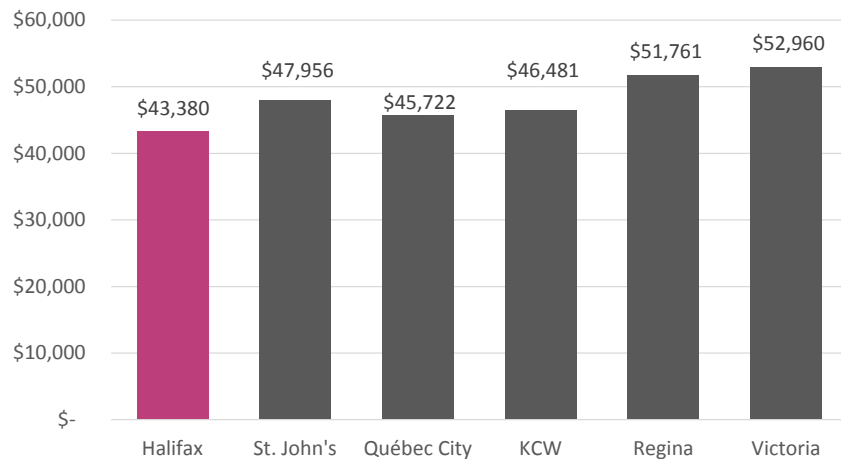
Benchmark Cities, \$2007 Chained Billions, 2017



Source: Conference Board of Canada, Metropolitan Outlook (Winter 2018)

FIGURE 22: Per Capita Income

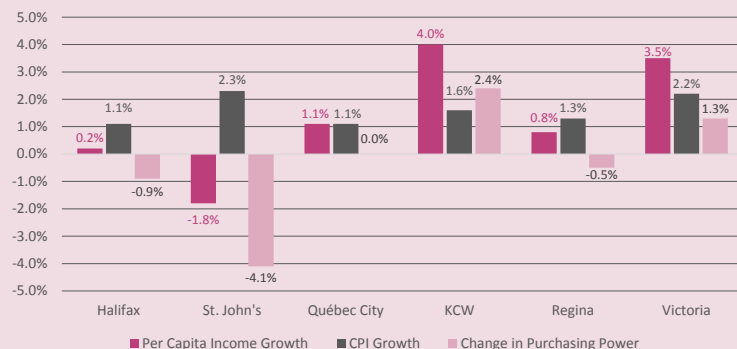
Benchmark Cities, 2017



Source: Conference Board of Canada, Metropolitan Outlook (Winter 2018)

FIGURE 23: Growth Rate of Personal Income Per Capita and the Consumer Price Index

Benchmark Cities, 2016-17

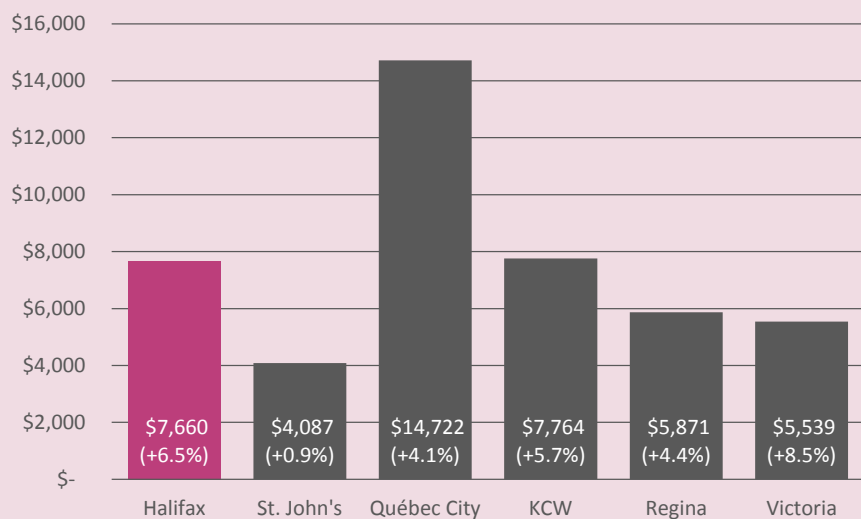


Source: Calculations based on the Conference Board of Canada, Metropolitan Outlook (Winter 2018)

Income growth in Halifax was outpaced by inflation in 2017 leading to a decrease in purchasing power. Among comparator cities, only Kitchener-Cambridge-Waterloo and Victoria, the two cities with the highest rates of income growth, recorded increases in purchasing power.

Retail spending in Halifax in 2017 increased by the largest amount in several years: 6.5%. This put Halifax in second place among the six comparator cities, all but one of which had robust retail spending growth figures for 2017. Halifax retail sales are forecasted to increase by 3.9% in 2018 and then average about 2% growth from 2019 to 2022. Provincial-level statistics show that expenditures at furniture stores rose by 65% in 2017. As Halifax represents more than half of the provincial economy, the trend here likely was similar.

FIGURE 24: Retail Sales Level and Annual Growth Rate
Benchmark Cities, \$ Millions, 2017



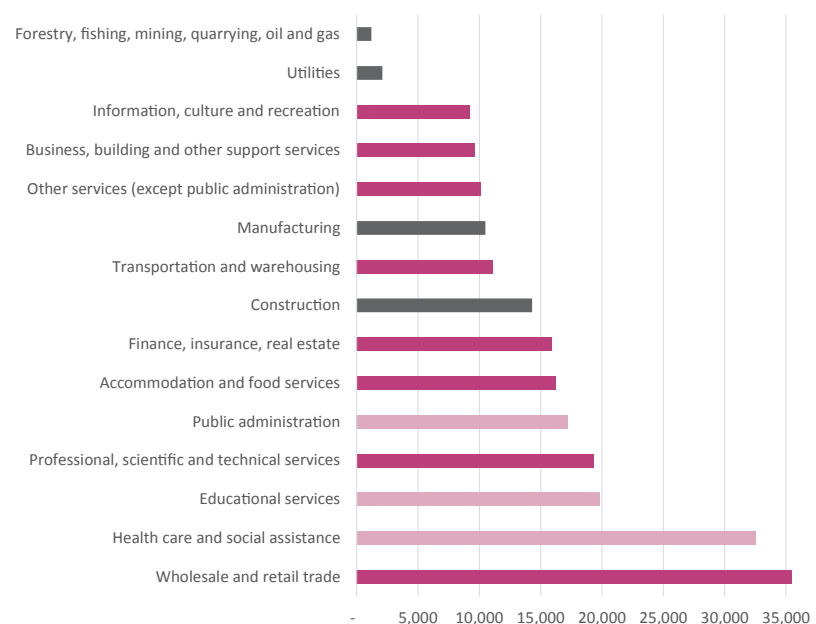
Source: Conference Board of Canada, Metropolitan Outlook (Winter 2018)

KEY INDUSTRIES

Discussion of Halifax's economy often focuses on major projects such as the naval shipbuilding program and large construction projects, but our economy is dominated by the service sector. In 2017, the employment split between the service sector and the goods sector was 87% to 13%, respectively. Furthermore, almost one-third (31%) of employment was in industries populated largely by public sector workers: health care, education, and public administration. Given that Halifax is a provincial capital, a regional centre for federal offices, home to Canada's East Coast Navy, and a regional centre for health care and higher education, the prominence of the service sector, and the public sector more specifically, is not surprising.

As shown in Figure 25, among 15 broad industries, the top seven in terms of employment are in the service sector (pink bars), with three of the top five being public sector focused (pale pink bars).

FIGURE 25: Employment by Industry
Halifax, NAICS Industries, 2017



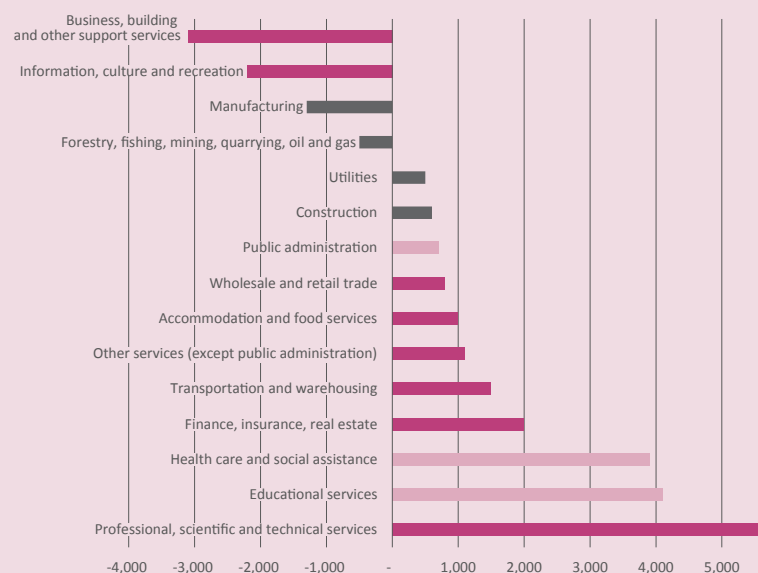
Source: Statistics Canada, Labour Force Survey

From 2008 to 2017, the service sector grew by over 15,000 workers, including almost 9,000 in public sector-dominated industries.

Employment in the goods-producing sector has been stable, fluctuating in a narrow band, but the 2017 figure is the lowest in the past 10 years.

By industry, the largest employment growth occurred in professional, scientific, and technical services, followed by education, health care, and social assistance, and then finance, insurance, and real estate. Four industries employed fewer people in 2017 than in 2008, with the drops led by business, building and other support services; information, culture, and recreation; manufacturing; and forestry, fishing, mining, quarrying, oil and gas.

FIGURE 26: Change in Employment by Industry
Halifax, NAICS Industries, 2008 to 2017



Source: Statistics Canada, Labour Force Survey

Looking to 2022, the Conference Board of Canada predicts that GDP growth will be led by wholesale and retail trade (compound annual growth rate of 2.2%), followed by professional, scientific and technical services (2.1%), transportation and warehousing (2.0%), and finance, insurance, and real estate (1.9%). The slowest-growing industry is predicted to be information, culture, and recreation (0.9%).

INVESTMENT

Construction is the major driver of business investment in Halifax. The construction sector saw a significant increase in activity in 2017 compared to 2016 and performed well above the 10-year average.

Annual major project spending in the city, as measured by the Atlantic Provinces Economic Council's Major Projects Inventory, was \$1.9 billion in 2017 and is forecasted to remain the same in 2018. Among these major projects are several residential and non-residential construction developments.

The teardown of the Cogswell Interchange will begin in 2019. This infrastructure project will include three kilometres

of new bike lanes and paths for active transportation (walking, cycling, skateboarding, etc.), six acres of land for development, and four acres of parks and open spaces. This phase of the project will be complete by 2020. In 2022, the complementary \$650 million redevelopment of Cogswell Street will begin, which will include the development of 2.5 million sq. ft. of mixed-use space and up to 2,000 rental and condominium units.

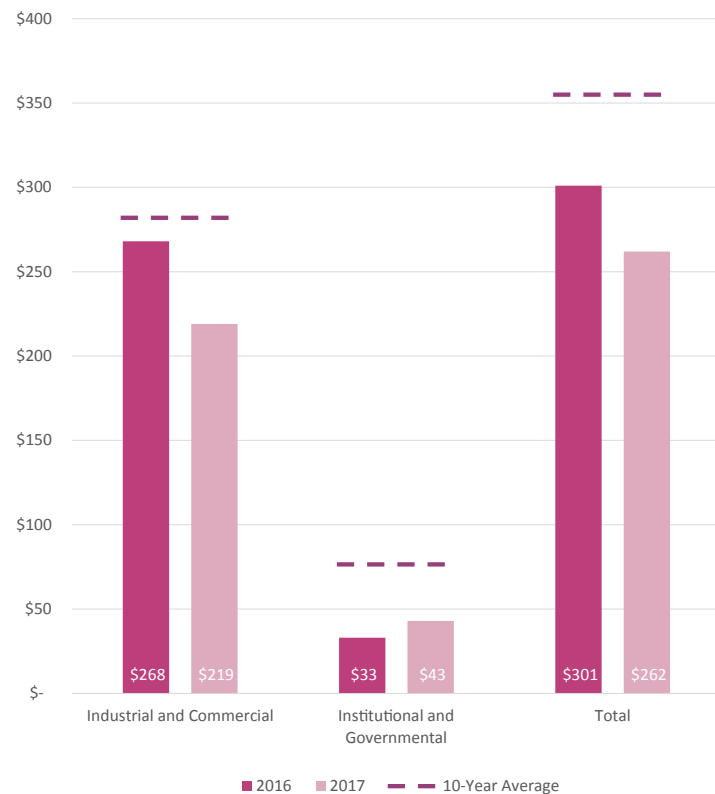
Work at Irving Shipbuilding remains Halifax's largest major project. There are currently over 1,800 shipbuilders employed. Steel cutting commenced for the third Arctic and Offshore Patrol Ship (AOPS), and the first AOPS is scheduled to be delivered to the Royal Canadian Navy this

year. Irving Shipbuilding has committed to over \$580 million in contracts in Nova Scotia as part of the National Shipbuilding Strategy. These contracts are estimated to support 9,500 full-time-equivalent person-years of employment and generate \$460 million in income and \$340 million in consumer spending within the province.

Non-residential construction activity decreased for the second straight year due to the completion of several major projects. Investment in industrial and commercial real estate decreased by 18.4%, reflecting the completion of the Nova Centre, the Big Lift, and IKEA. Some large non-residential projects under construction in 2018 include The Queen's Marque, Cabela's, and Dalhousie University's ideaHUB.

FIGURE 27: Investment in Non-Residential Building Construction

Halifax, \$2007 Millions, 2016 to 2017

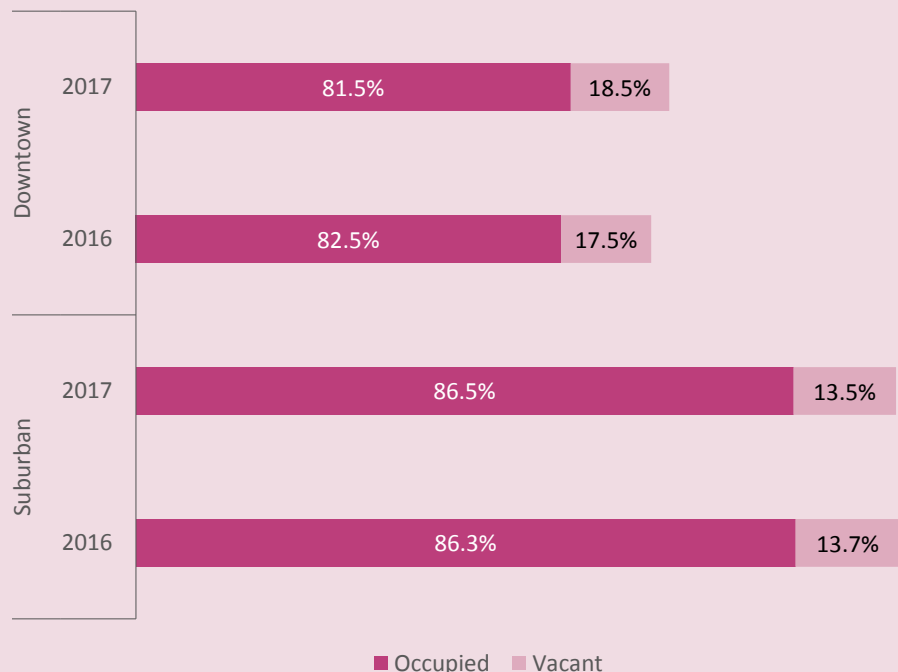


Source: Statistics Canada, Investment in Non-Residential Building Construction

Total office space in Halifax increased by 180,000 sq. ft. with the completion of the Nova Centre, pushing the downtown office vacancy rate up 1.0 percentage point to a rate of 18.5%. Vacancy rates decreased outside the downtown core by 0.2 percentage points to 13.5%, as suburban office supply decreased by 40,000 sq. ft.

FIGURE 28: Total Office Space Occupancy and Vacancy Rates

Regions within Halifax, Sq. Ft., 2016 to 2017



Source: CBRE Halifax, Halifax Office MarketView (Q4 2017)

On the residential side, housing starts rose from 2,305 to 2,752, an increase of 19.4%, and exceeded the 10-year average of 2,378. Increases occurred in both single- and multi-unit starts, with single-unit starts increasing by 162 to a total of 738, and multi-unit starts growing by 276 to 2,014. The number of single-detached housing starts in 2017 was slightly below the 10-year average, but also was the highest number of these starts since 2012.

FIGURE 29: Single and Multi-Unit Housing Starts

Halifax, Number of Units, 2008 to 2017

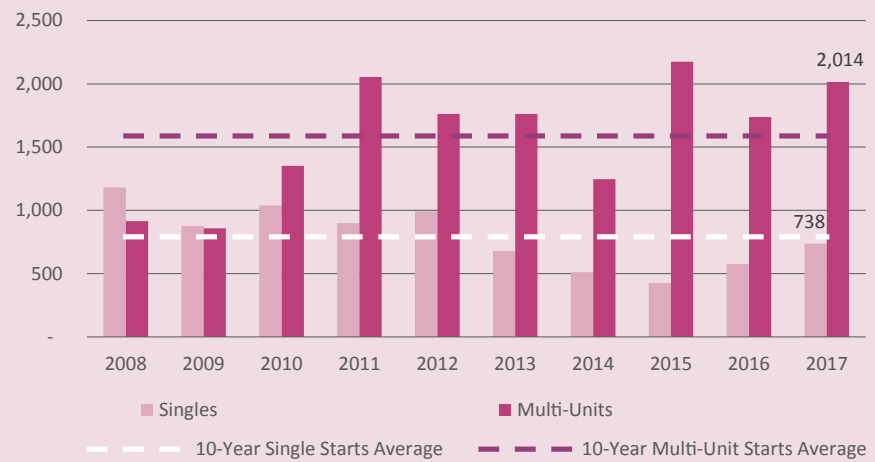


FIGURE 30: Single and Multi-Unit Housing Starts by Region

Regions within Halifax, Number of Units, 2010 to 2017



Multi-unit starts have increased significantly on the peninsula, which aligns with the Centre Plan mandate to create density in the urban core. The greatest gain was seen in the North End, with an increase of 200 apartment units. Apartment-unit starts decreased significantly in rural Halifax, dropping from 196 to 60, while single-unit starts in rural Halifax increased by 55.

The vacancy rate for two-bedroom apartments in Halifax is at a five-year low of 2.4%, so growing numbers of multi-units starts are welcome news to those concerned that a tight rental market will lead to escalating rents. Housing affordability is discussed in further detail in the Special Analysis: Residential Affordability on page 42.

The value of building permits, an indicator of future construction investment, increased significantly in 2017 for both residential and non-residential permits. Residential permits grew to over \$600 million, the largest value in 15 years, due to an increase in demand for multi-unit buildings. Projects such as Shannon Park and Cogswell are forecasted to bring a significant number of multi-unit buildings online. The value of non-residential permits increased for the first time since 2012.

FIGURE 31: Value of Building Permits by Sector

Halifax, \$ Millions, 2008 to 2017



Source: Statistics Canada, Building Permits

In addition to construction activity, investment in capital equipment and research and development (R&D) are key to an economy's health. Halifax-level statistical data on capital investment, depreciation, and R&D are not available, but according to the Halifax Partnership's SmartBusiness Quarterly Report: Winter 2018 edition, 45% of Halifax

businesses surveyed were planning to expand within the province in the next 18 months. Similarly, the Business Confidence Survey found that 47% of surveyed businesses plan major investments in facilities or equipment in the next year and 23% plan major investments in R&D.

BUSINESS CONFIDENCE

A core measure from the Halifax Partnership's Business Confidence Survey is our Business Confidence Index (BCI), which incorporates several aspects of respondents' views on current and future economic prospects. The BCI hit another record high this year of 32.9, up from last year's record figure of 29.1. The BCI ranges from -100 to +100, with figures above zero indicating a positive, confident outlook and figures below zero indicating pessimism. Out of 300 businesses surveyed, 85% said that they were extremely

(14%) or moderately optimistic (71%) about their economic prospects.

The share of businesses that rated Halifax as an above-average place to do business increased from 23% to 27%, with only 12% of businesses responding that Halifax is a below-average place to do business. The 2018 figures for "above average" and "below average" are a record high and low, respectively.

TABLE 9: Ratings of Business Confidence

Halifax, Share of Business-Owner Respondents, 2013 to 2018

Year	Business Confidence Index	Rating of Halifax as a Place to do Business			
		Above Average	Just Average	Below Average	Don't Know/ No Answer
Spring 2013	24.6	19%	59%	18%	4%
Spring 2014	20.2	14%	66%	17%	4%
Spring 2015	21.1	15%	61%	20%	4%
Spring 2016	28.1	26%	55%	14%	5%
Spring 2017	29.1	23%	60%	12%	4%
Spring 2018	32.9	27%	57%	12%	3%

Source: Corporate Research Associates, Business Confidence Survey (Spring)

The Business Confidence Survey also asks about intentions for the next year regarding various business activities. Almost all activities that generally would be considered positive from the list in Table 10 hit record highs in 2018. The jumps in the percentages of businesses planning to hire additional staff, make a major investment in facilities or equipment, or make a major investment in research and development are especially noteworthy. Also encouraging is that the ratio of businesses planning to hire more staff to those planning to reduce staff is greater than eight to one.

TABLE 10: Intended Business Activities Over Next Year

Halifax, 2013 to 2018

Expected Activities in the Next Year (% Saying "Yes")						
Activity	2013	2014	2015	2016	2017	2018
Increase sales	75%	75%	72%	80%	82%	86%
Hire additional staff	54%	53%	51%	59%	60%	67%
Introduce a new product or service	50%	52%	47%	48%	51%	54%
Make a major investment in facilities or equipment*	33%	30%	33%	29%	35%	47%
Enter a new market outside Atlantic Canada*	31%	27%	31%	24%	28%	29%
Make a major investment in R&D*	9%	12%	12%	14%	11%	23%
Downsize or reduce staff	8%	8%	11%	10%	7%	8%

*Wording of question changed slightly in 2018

Source: Corporate Research Associates, Business Confidence Survey (Spring)

HALIFAX GATEWAY

TABLE 11: Halifax Gateway Activities

Halifax, Units Indicated in Table, 2016 to 2017

Year	Air Passengers (En/Deplaned)	Cruise Passengers	Plane Movements	Cruise Ships	Port Cargo (Metric Tonnes)	HPA Port Cargo (TEUs)	Air Cargo (Metric Tonnes)
2016	3,908,799	238,217	84,974	136	8,272,345	480,722	33,330
2017	4,083,188	292,722	84,045	173	8,902,348	559,242	34,051

Sources: Various including Statistics Canada, Port of Halifax, Halifax Stanfield

The Halifax Gateway includes transportation infrastructure such as the Port of Halifax, Halifax Stanfield, Halifax Logistics Park, CN's auto port and rail infrastructure, and the Port of Sheet Harbour.

Last year was a notable one for the Port of Halifax as records set the previous year were broken once again. Cargo volumes at the port, as measured by the number of 20-foot equivalent units (TEUs) of containerized cargo, increased by 16.3%. On June 29, 2017, the Zim Antwerp, a ship with a capacity of just over 10,000 TEUs, landed in Halifax and became the largest containerized cargo vessel ever to arrive in the harbour.

Likewise, 2018 was historic for Halifax Stanfield. More than four million passengers used the facility—a record-breaking first. There was an increase of 6.5% in domestic ridership and a total increase of 4.5%, although international passenger numbers declined by 5.9% compared to 2016. Preliminary cargo numbers showed that air cargo grew compared to 2016, from 33,330 to 34,051. This growth was aided by the new \$5 million cargo pad built in December 2016 to increase international lobster exports. Lobster exports to China and South Korea have been a key driver of growing airport cargo movements in recent years.

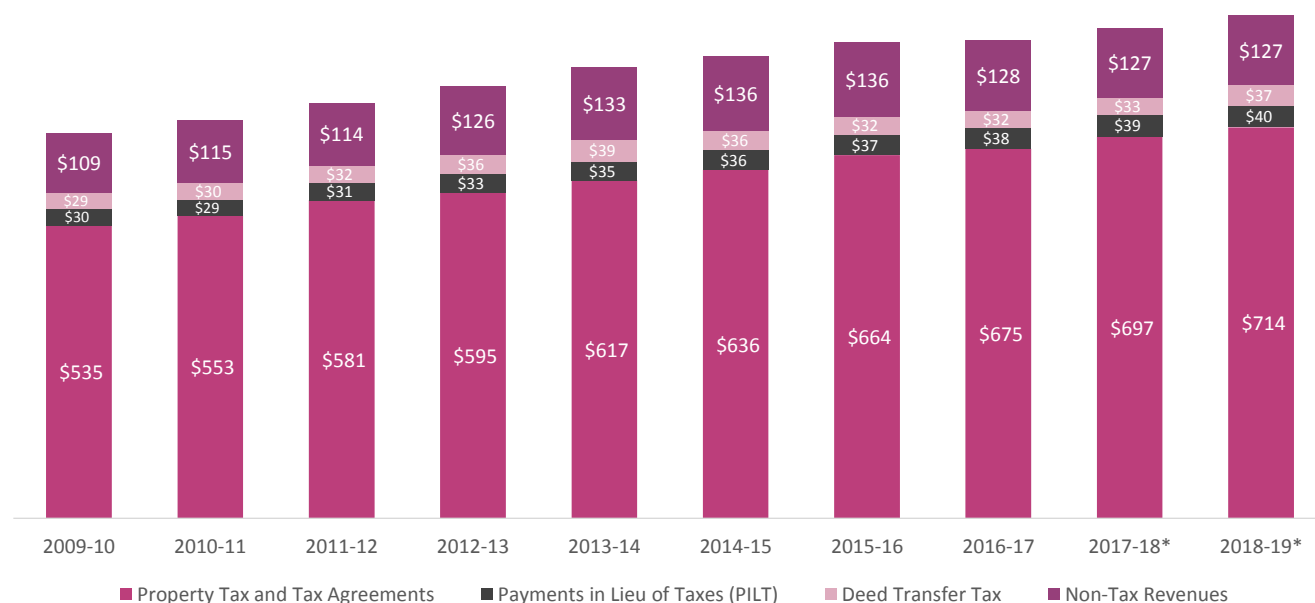
MUNICIPAL FINANCE

HRM Council had to grapple with several fiscal issues for the 2018-19 budget. In 2017-18, new commercial real estate developments led to rising vacancy rates, which in turn caused property tax assessments and related tax revenues to drop. Additionally, the deficit associated with the new Nova Centre has turned out to be larger than expected. In more positive news, revenues from the deed transfer tax were at their highest level in several years.

In response, Council passed a 1.97% property tax hike for the average residential property. This increase means that the average homeowner will be paying \$37 more per year. The average commercial tax bill fell 1.1%. Commercial property tax revenue now stands at nearly 38% of total property tax revenue, down from almost 41% in 2010-11.

FIGURE 32: Municipal Revenues by Source

Halifax, \$ Millions, 2009 to 2019



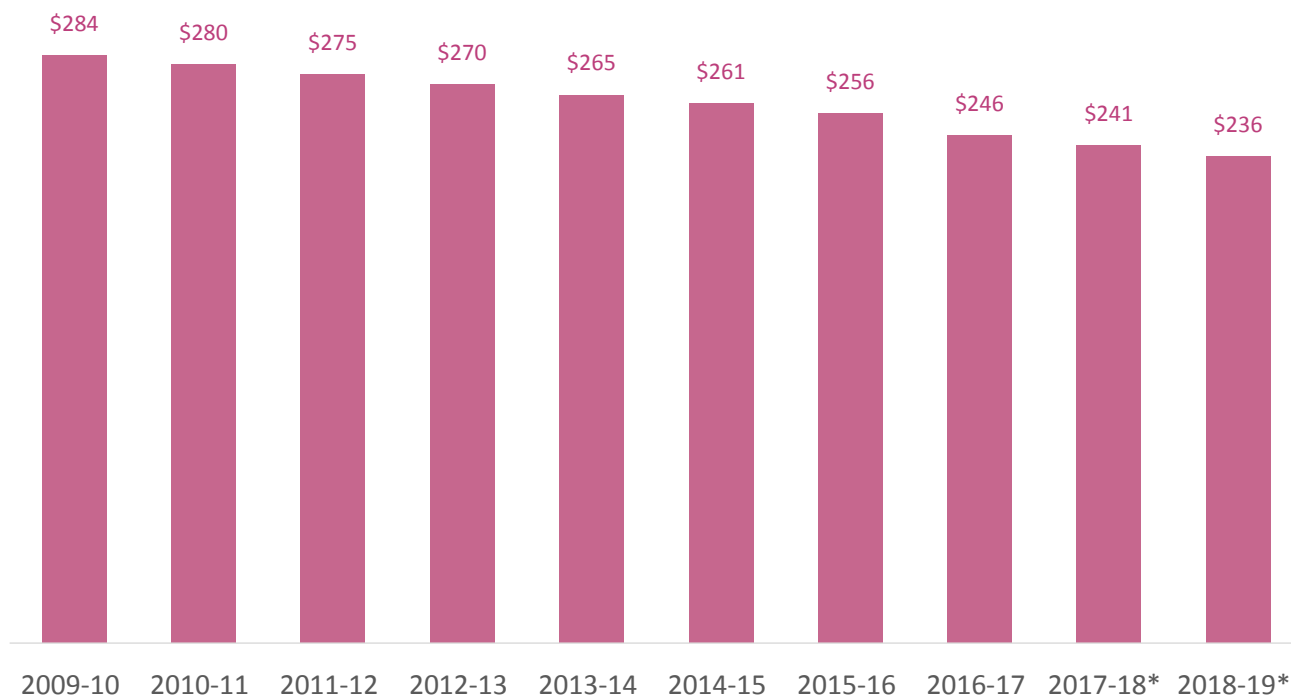
*Denotes projection

Source: Halifax Regional Municipality – Financial Policy and Planning

Halifax Regional Municipality continues to pay down its debts at a steady pace. In 2017-18 tax-supported debt decreased by \$5 million to \$241 million and is forecasted to decline another \$5 million in 2018-19. This marks the tenth straight year that tax-supported debt has decreased in the municipality.

FIGURE 33: Municipal Tax-Supported Debt

Halifax, \$ Millions, 2009 to 2019



*Denotes projection

Source: Halifax Regional Municipality, Multi-Year Financial Strategy

SPECIAL ANALYSIS: RESIDENTIAL AFFORDABILITY

In its efforts to attract business investment, Halifax bills itself as the city that offers TLC—talent, location, and cost advantages. There also is a TLC approach to Halifax's real estate market more specifically. Can the talented people we need to propel our economy—post-secondary students, graduates entering the workforce, new immigrants, experienced professionals—find appropriate housing in a desirable location at a cost that is affordable and competitive with other cities?

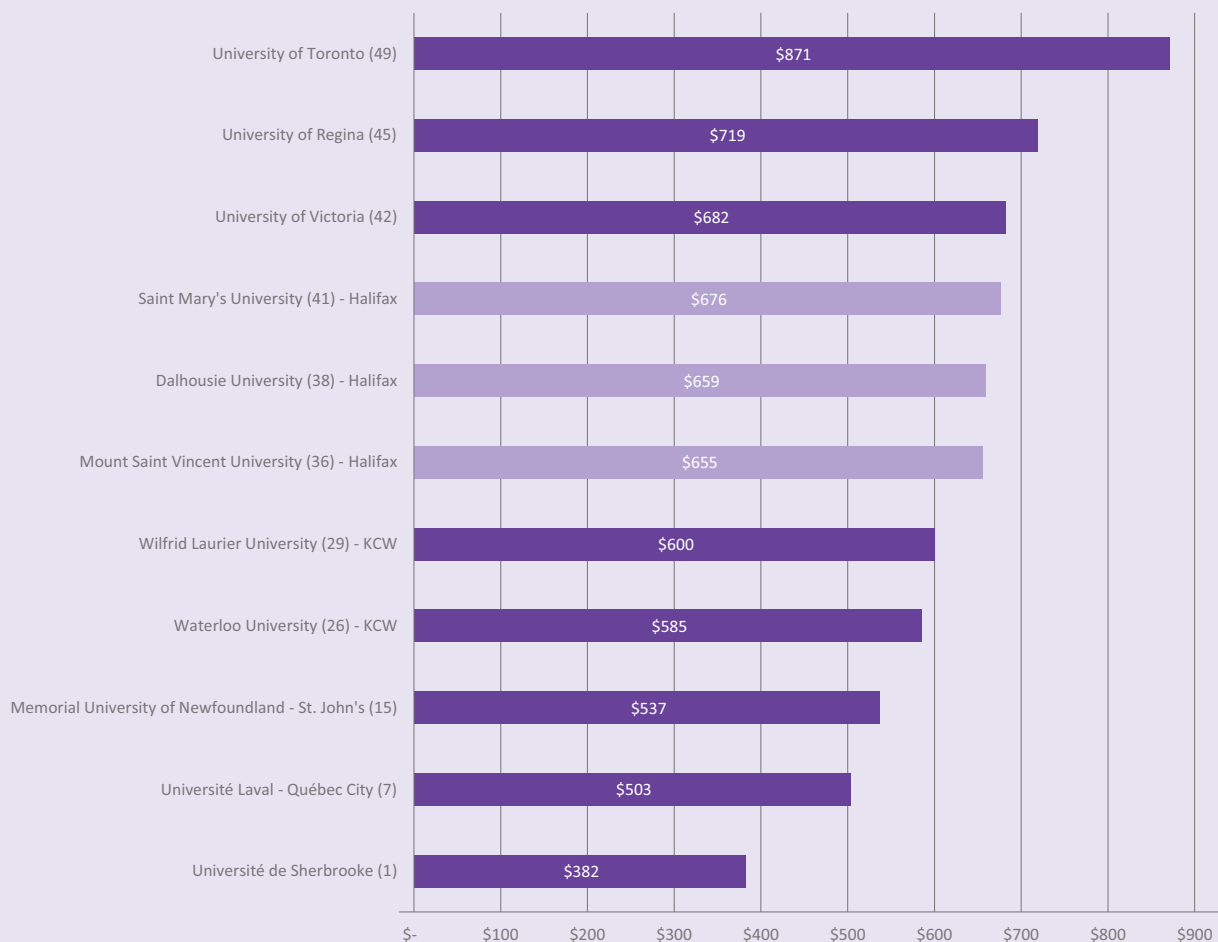
This special analysis section examines real estate options and costs at various points in the professional lifecycle to generate a deeper understanding of how well or poorly the city is doing.

As Halifax seeks to become an educator to the world, does it offer students affordable accommodations? *Maclean's* magazine collects data on average rent for students for its annual University Rankings issue. Figure 34 shows average student rent in Halifax and the six benchmark cities, plus the cheapest (Université de Sherbrooke) and the most expensive (University of Toronto) out of 49 universities to provide a sense of the overall range.

The three Halifax universities included in the survey are close to each other and in the middle of the pack among comparator cities, but towards the more expensive end of the rankings overall.

FIGURE 34: Average Monthly Rent Among Students Surveyed

Select Universities, University Student Living Away from Home, 2018



*Figures in parentheses are rankings out of 49 universities; 1 indicates least expensive and 49 most expensive.
Source: Maclean's, University Rankings (2018)

Upon graduation, young people typically enter the labour force and move into their own homes, a one-bedroom apartment, for example, for the first time. Young professionals tend to seek downtown locations that are close to work and cultural, entertainment, and recreational amenities where they can conveniently travel by public transit, bicycle, or on foot.

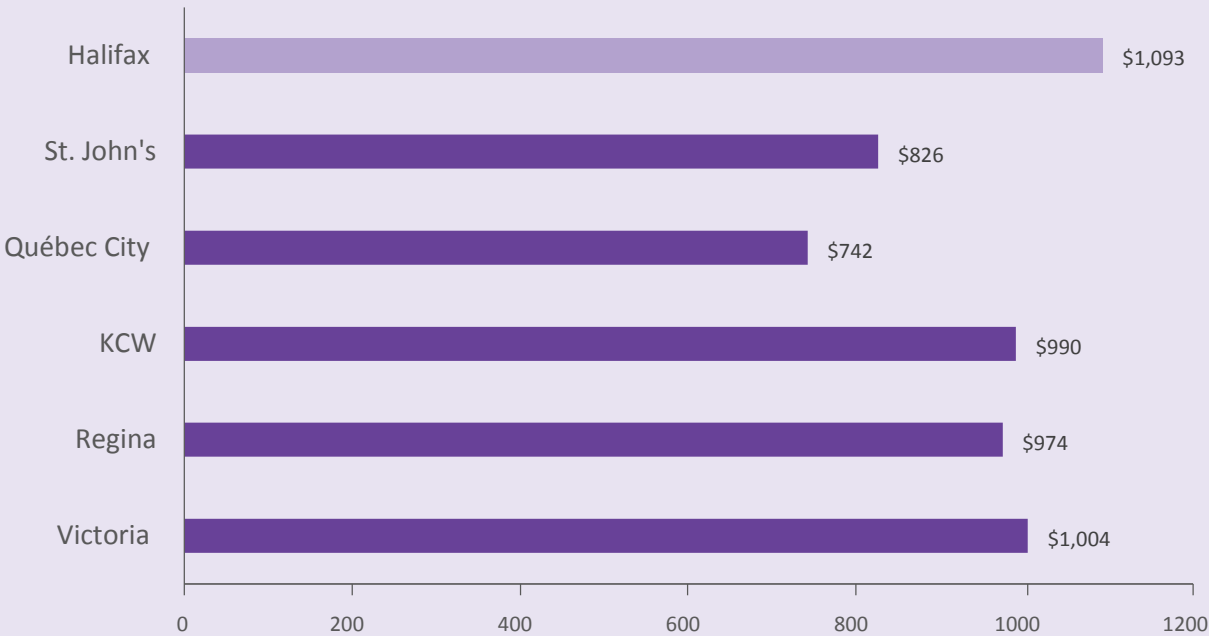
As a real estate reference point for this demographic, we compare average rents for one-bedroom apartments in city centres. On this metric Halifax is the most expensive among

the comparators, more than \$100 per month above the next-highest city. Halifax's increase of 4.5% from 2016 to 2017 puts it in the middle of the pack, with St. John's at the low end (0.5% increase) and Kitchener-Cambridge-Waterloo at the top (13.5% increase).

The tight rental market in Halifax, as evidenced by a very low and falling vacancy rate (1.7% in 2017, down from 1.9% in 2016), suggests that rents may rise further in the coming years unless new supply is added to the market.

FIGURE 35: Average Monthly Rent (Young Professional)

Benchmark Cities, One-Bedroom Apartment (Downtown), 2017

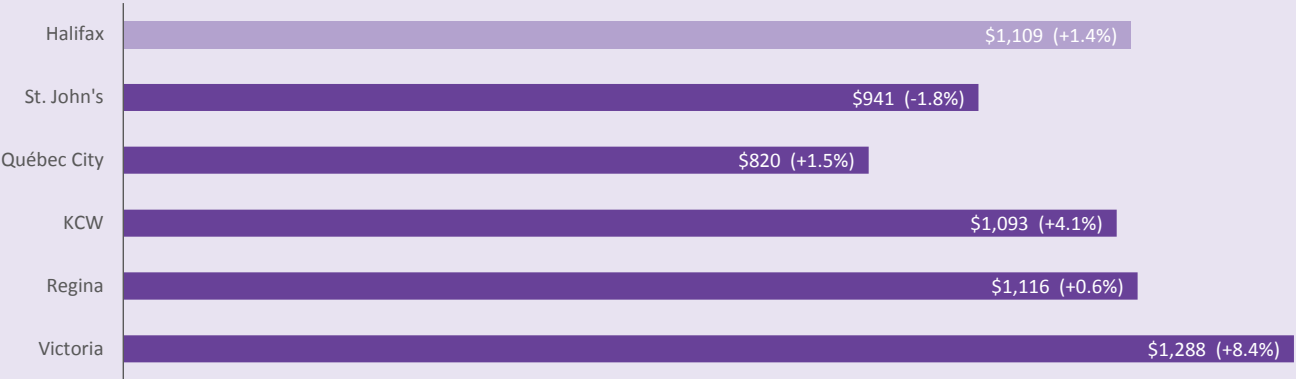


Source: Canada Mortgage and Housing Corporation, Housing Market Information Portal

The attraction and retention of immigrants is another key component in Halifax's growth strategy. The next comparison is of a newly arrived family that may not be in a position yet to purchase a home and instead chooses to rent a two-bedroom apartment, but not necessarily in the downtown core.

Halifax ranks third highest of six, but with the second-highest increase from 2016 to 2017. Over the past decade, the average rent for a two-bedroom apartment in Halifax has grown by a compound annual growth rate (CAGR) of 3.2%, while over the same period the annual rate of growth for the Halifax consumer price index was only 1.5%.

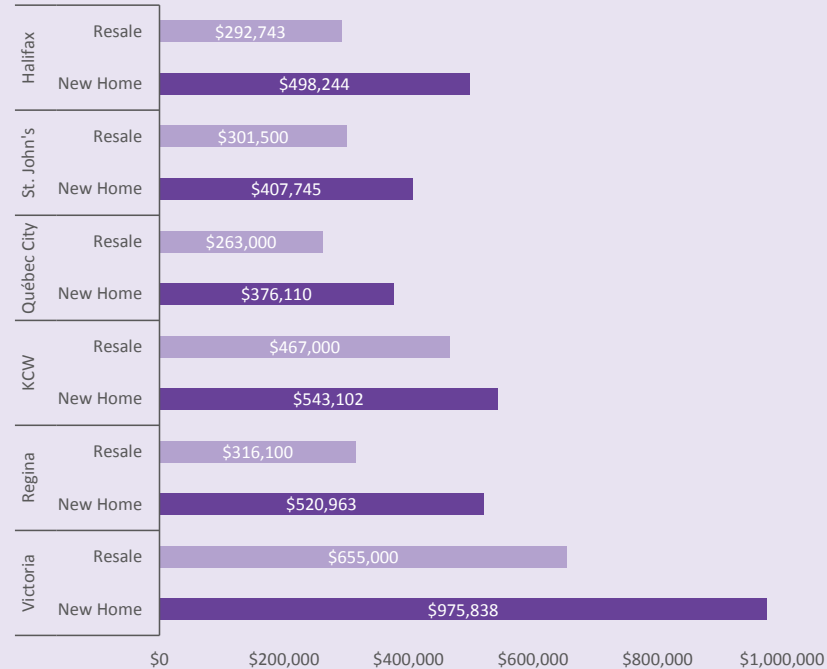
FIGURE 36: Average Monthly Rent and Growth Rate (New Family)
Benchmark Cities, Two-Bedroom Apartment, 2016-17



Source: Canada Mortgage and Housing Corporation, Rental Market Statistics

Finally, we consider the case of a mid-career professional family that wants a detached house. For both new homes and resale of existing homes, Québec City records the lowest average price, while Victoria has the highest. Halifax ranks third lowest for new homes and second lowest for resales. The average price for new homes in Halifax has risen by a CAGR of 4.7% over the past decade, with a corresponding figure of 2.6% for resales.

FIGURE 37: Average Price of Single-Detached House by Sale Type
Benchmark Cities, 2017



Source: Canada Mortgage and Housing Corporation, Housing Now (January 2018)

Halifax has not been subject to the kinds of headline-grabbing housing price increases that have been seen in major centres like Toronto and Vancouver, but in the scenarios examined here, it tends to land towards the more expensive end of the spectrum among comparator cities. Furthermore, accommodation costs in Halifax have been growing faster than the general rate of inflation.

That said, a degree of caution should be exercised in the use of only simple averages as points of comparison, either across cities or over time. The addition of new luxury

apartments, for example, may have the mathematical effect of raising the average rent level in a city, but the availability and price of more modest accommodations could remain completely unchanged.

Affordable real estate is a key selling point in Halifax's TLC sales pitch. As the city grows, development policies must ensure that the young people, immigrants, and skilled professionals that we want to attract and keep in Halifax can find affordable homes.

QUALITY OF PLACE

KEY INDICATORS

POVERTY

- Share of population in poverty
- LIM and LICO thresholds

CHILD CARE

- Cost of child care

ARTS, CULTURE, AND ENTERTAINMENT

- Admission prices for symphony and art galleries
- Admission prices for CHL hockey and NBL basketball

SAFETY

- Crime severity index
- Violent crime severity index
- Incidence of crime by category

COMMUNITY

- Quality of life in Halifax
- Voter turnout

HEALTH

- Prevalence of health conditions
- Participation in activities with impact on health
- Access to a regular health care provider

TRANSPORTATION

- Halifax Transit ridership
- Halifax Transit hours of service
- City Matters Survey results on transit

ENVIRONMENT

- Waste-diversion rates
- Renewable-energy supply

POVERTY

A city can boast impressive macroeconomic statistics for wealth and income, but if some people are left behind in the wake of these positive developments, a community cannot call itself successful. Progress in fighting poverty must be pursued and measured as much as progress in growing GDP.

There is a new commitment to reducing poverty as a result of an initiative kicked off in summer 2017 under the co-leadership of the Halifax Regional Municipality and United Way Halifax. An initial report of findings was published in March 2018, with project implementation to begin in the coming months.

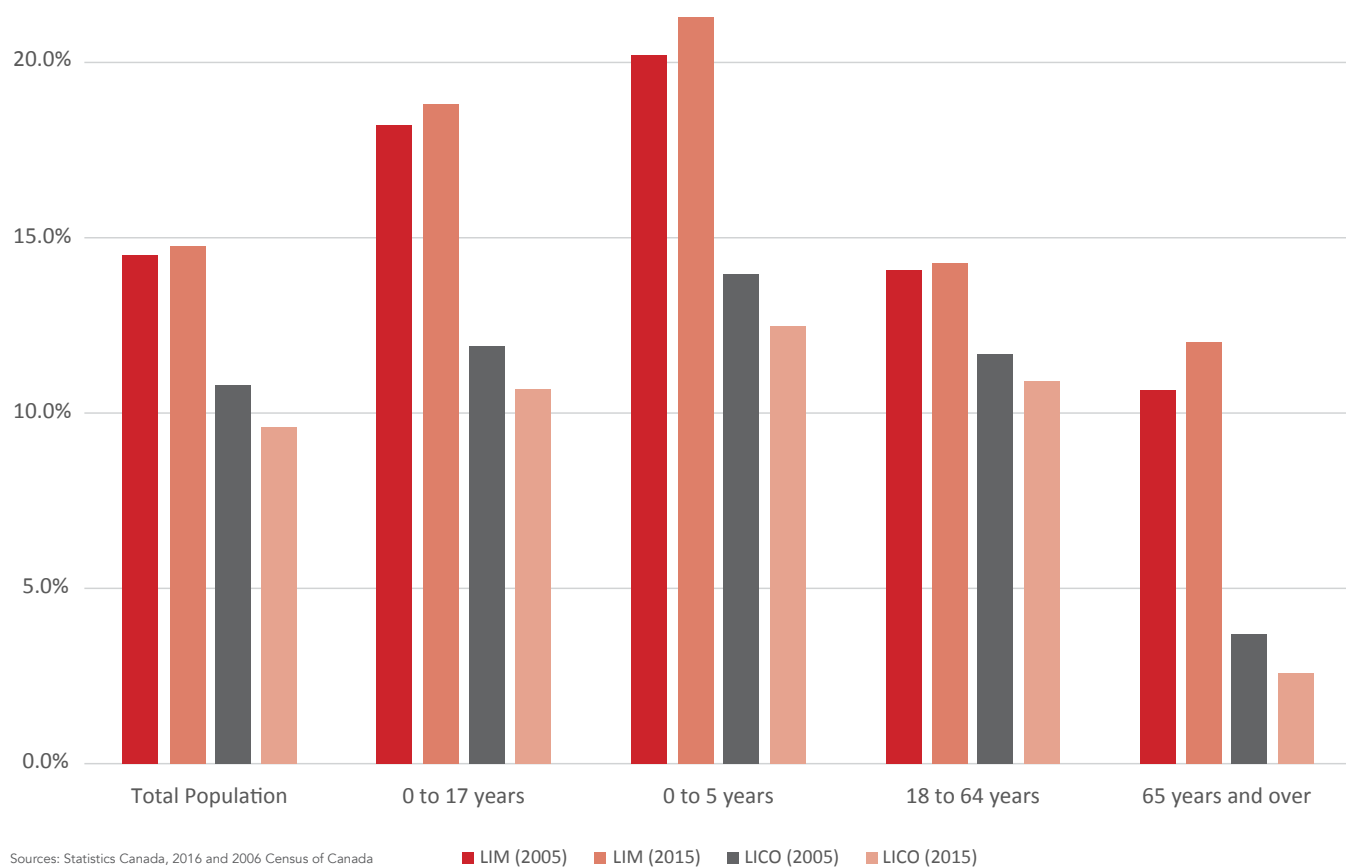
LIM and LICO are often cited as proxies for poverty measures. Under LIM, a household is low income if its adjusted income is below half of the population's median income. For the LICO, a spending model is estimated and

the income needed for a given level of spending on food, shelter, and clothing is derived. According to the 2016 census, almost 59,000 people in Halifax fall below the LIM threshold, including close to 14,000 children under the age of 18—5,000 of whom are under six years old—and 7,000 seniors. Compared to 10 years earlier, the proportion of the overall population falling below the LIM threshold stayed the same, but the proportion of children (under 18) and especially young children (under six) rose.

Over 38,000 people fall below the LICO threshold, of whom roughly 8,000 are children and 1,600 are seniors. Compared to 10 years ago, the number of children falling below the LICO threshold has decreased from about 9,000 to about 8,000. The population of seniors falling below the LICO threshold has remained unchanged, despite an increase in the number of seniors in the city.

FIGURE 38: Share of Population in Poverty by Methodology and Age Group

Halifax, LIM (After Tax) and LICO (After Tax) Thresholds, 2006 and 2016



Looking across the municipality, regional variations are apparent. By either measure, the prevalence of low-income households is much higher in urban Halifax than in rural Halifax. Drilling deeper reveals further variation. Within rural Halifax, the Eastern Rural area has higher rates of low-income households than do the Inner and Western Rural areas. Among urban areas, the Halifax Peninsula and Mainland Halifax have the highest rates, with Dartmouth, Bedford, and Sackville forming the next tier, and Fall River reporting the lowest rates.

More precise manifestations of poverty can be seen in aspects of daily life such as housing and food.

In the 2016 census, 2.9% of Halifax households reported living in housing that is “not suitable”. Among sub-areas the highest rate occurs on the Halifax Peninsula (5.6%), while the lowest is in Fall River (0.6%).

The 2018 City Matters Survey, conducted by MQO Research, asked several questions related to poverty. When asked to compare the state of poverty in Halifax today to 10 years ago, 43% said poverty was a bigger problem today, 29% said that it was the same, and 9% thought that poverty was now less of a problem. About half of respondents with household income below \$50,000 said they sometimes had to choose between food and other life necessities.

FIGURE 39: Share of Population in Low-Income by Methodology

Regions within Halifax, LIM (After Tax) and LICO (After Tax) Thresholds, 2016



Source: Statistics Canada, 2016 Census of Canada

CHILD CARE

Access to quality, affordable child care is an important contributor to reducing poverty, increasing women's labour force participation, and promoting the development of young children.

There are over 20,000 children under age five in Halifax. The Nova Scotia Department of Education and Early Childhood Development lists 158 licensed, full-day child care centres in Halifax with total capacity of roughly 9,000. Clearly there are far more children in the pre-school age range than there are licensed child care spaces.

However, many infants below one year will be cared for by a parent on maternity or paternity leave, and many children between ages one and four will be cared for by a stay-at-home parent, relative, or a non-licensed child care centre (furthermore, the provincial government continues to expand its pre-primary program, which over time will provide coverage for an increasing number of four-year-olds). Thus, it is incorrect to conclude there is a shortage of over 11,000 child care spaces in Halifax. That said, there could be many families having trouble accessing the services they need, but no hard data exist to answer the question of how many.

More than one-third (39%) of respondents to the City Matters Survey ages 18 to 34, and 26% of those ages 35 to 54 strongly agreed that they have sub-optimal child care arrangements because they had no other option.

A December 2017 report from the Canadian Centre for Policy Alternatives provides results of survey data on child care fees across Canada. Due to the heavily subsidized provincial child care program in Québec, fees are by far the lowest in Québec City. Among the remaining four comparator cities (no data was available for Victoria), Halifax ranks second least expensive for all three age categories.

Table 12: Median Monthly Fees for Child Care by Age of Child

Benchmark Cities, Cost per Licensed Space, 2017

	Infant (<18 months)	Toddler (18 months to 3 years)	Preschool (>3 years)
Halifax	\$910	\$825	\$823
St. John's	\$1,085	\$955	\$868
Québec City	\$183	\$183	\$183
KCW	\$1,325	\$1,085	\$975
Regina	\$875	\$635	\$575

Source: Canadian Centre for Policy Alternatives, Time Out: Childcare Fees in Canada 2017









The City Matters Survey found that almost 80% of respondents ages 18 to 34 and half of respondents ages 35 to 54 felt strongly that child care options were available but were too expensive.

ARTS, CULTURE, AND ENTERTAINMENT

Halifax's status as a provincial capital and the Atlantic region's major centre means that its residents are blessed with a variety of options for arts, culture, and entertainment that exceed what is available in many other

similarly sized Canadian cities. In this year's City Matters Survey, the average rating for arts and cultural events in Halifax on a scale of one (very poor) to 10 (excellent) was 7.0, with 44% giving a score of eight or higher.

TABLE 13: City Matters Survey Results

	2014 Mean Score	2017 Mean Score	2018 Mean Score
 Overall quality of life	7.7	→ 7.2	→ 7.1
 Good place to raise a family	7.7	→ 7.8	→ 7.4
 Outdoor recreational facilities	7.3	→ 6.8	→ 6.9
 Indoor recreational facilities	7.2	→ 6.8	→ 6.8
 Arts and cultural events	7.4	→ 6.8	→ 7.0
 Commute time from home to work	NA	→ 6.6	→ 6.8
 City is easy to get around (traffic disruptions and navigation)	6.6	→ 5.9	→ 6.0
 Availability of affordable housing	6.1	→ 5.7	→ 5.5

Source: MQO Research – City Matters Survey 2018

All six comparator cities feature major art galleries and their own symphony orchestras. Rough cost comparisons were made using the price of one regular adult admission to the art gallery and the price of a premium-seat multi-concert subscription for the symphony. The number of concerts offered in a subscription package ranges from eight to 14 across the six cities, but the prices are presented on a

per-concert basis. As shown in Table 14, Halifax cannot beat the free art gallery admission offered in Kitchener-Cambridge-Waterloo and Regina, but it still fares well against the other cities. As for the price of a symphony subscription, Halifax comes out at roughly average across the six cities.

TABLE 14: Costs for Art Galleries and Symphony Subscriptions

Benchmark Cities, Average Admission Price, 2018

Art Gallery			Symphony Orchestra	
City	Name	Regular Adult Admission	Name	Per-Concert Subscription A-Seat Price (# of Concerts in Package)
Halifax	Art Gallery of Nova Scotia	\$12	Symphony Nova Scotia	\$54 (10)
St. John's	The Rooms Provincial Art Gallery	\$10	Newfoundland Symphony Orchestra	\$25 (14)
Québec City	Musée national des beaux-arts du Québec	\$20	L'Orchestre symphonique de Québec	\$57 (12)
KCW	Kitchener-Waterloo Art Gallery	Free	Kitchener-Waterloo Symphony	\$52 (8)
Regina	MacKenzie Art Gallery	Free	Regina Symphony Orchestra	\$76 (8)
Victoria	The Art Gallery of Greater Victoria	\$13	Victoria Symphony	\$46 (10)

Sources: Various, websites of respective art galleries and symphony orchestras

Unique among the comparator cities, Halifax is home to a Category A theatre, Neptune Theatre. Category A theatres are larger facilities that tend to put on more technically sophisticated productions. Most other Category A theatres in Canada are located in larger centres such as Toronto, Montreal, Vancouver, Calgary, and Winnipeg.

Halifax and Kitchener-Cambridge-Waterloo are the only two comparator cities to offer sports fans both major junior

hockey and professional basketball. Only Regina has a Canadian Football League (CFL) team, but discussions recently have taken place between the CFL and an ownership group that is interested in bringing an expansion team to Halifax. In Table 15, the costs of tickets (lower bowl seats) for a family of four (two adults and two children under age 12) are compared. For both hockey and basketball, Halifax has the lowest ticket prices and in most cases is substantially more affordable.

TABLE 15: Costs for Hockey and Basketball Tickets

Benchmark Cities, Admission Price per Family of Four, 2017

Canadian Hockey League			National Basketball League of Canada	
City	Team	Tickets for Family of Four	Team	Tickets for Family of Four
Halifax	Halifax Mooseheads	\$54	Halifax Hurricanes	\$48
St. John's	NONE	NA	St. John's Edge	\$83
Québec City	Québec Remparts	\$60	NONE	NA
KCW	Kitchener Rangers	\$84	KW Titans	\$90
Regina	Regina Pats	\$128	NONE	NA
Victoria	Victoria Royals	\$89	NONE	NA

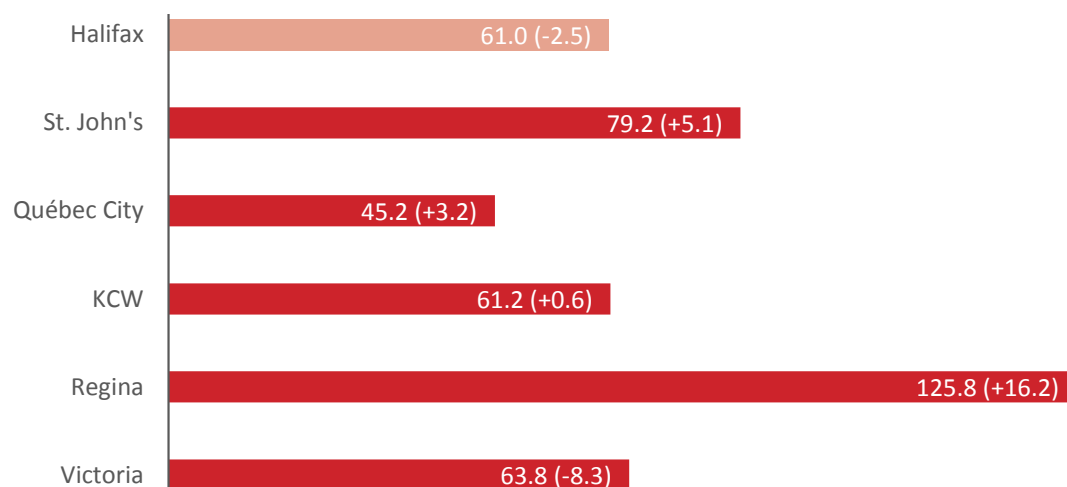
Sources: Various, websites of respective teams

SAFETY

Statistics Canada's Crime Severity Index (CSI) measures the incidence and severity of crime over time and across cities. The most recent CSI for Halifax decreased for the seventh straight year in 2016, dropping 2.5 points. Halifax's score is below the Canadian average and the second lowest among benchmark cities.

Figure 40: Crime Severity Index and Annual Change

Benchmark Cities, 2016

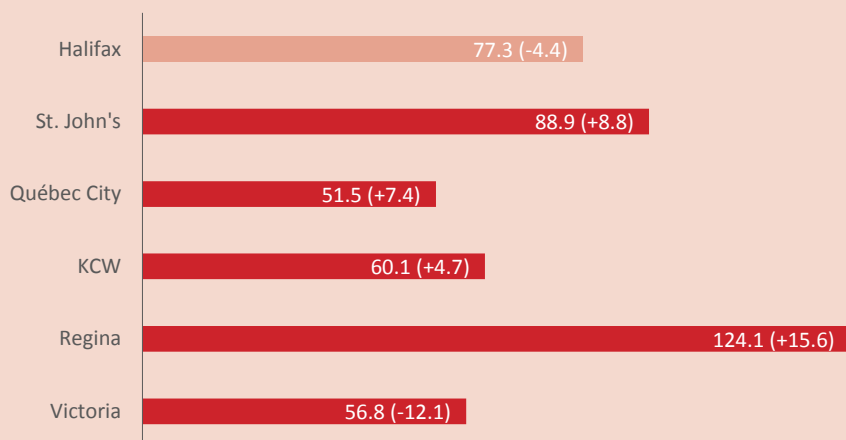


Source: Statistics Canada, Uniform Crime Reporting Survey

Halifax's Violent Crime Severity Index (VCSI) decreased by 4.4 points, which was welcome news after the 7.8 point increase in 2015. Halifax's VCSI remains the third highest among benchmark cities. Regina experienced the largest increase in its VCSI at 15.6 points. Victoria experienced the largest decrease at 12.1 points.

FIGURE 41: Violent Crime Severity Index and Annual Change

Benchmark Cities, 2016



Source: Statistics Canada, Uniform Crime Reporting Survey

Data from the Halifax Regional Police on the incidence of crime show in detail how Halifax's overall crime rate is changing. Personal crime, property crime, and the number of criminal offences increased in 2017, with personal crime increasing significantly by 24.7%. The number of traffic collisions increased by over 500 cases and traffic fatalities doubled from seven to 15.

The City Matters Survey found that 80% of respondents felt very or mostly safe in their own neighbourhood (unchanged from last year), 47% (similar to the 45% figure from 2017) felt very or mostly safe taking public transit after 10:00 p.m., and 33% (down from 40% last year) said they would feel very or mostly safe walking alone at night in downtown Halifax.

TABLE 16: Incidence of Crime by Category

Halifax, Number of Reported Cases, 2016 to 2017

Year	Person Crime	Property Crime	Criminal Other	Federal	Provincial	Traffic Criminal	Traffic Collision	Traffic Fatalities	Traffic Injured
2016	2,577	9,674	7,024	1,097	41,444	2,554	8,516	7	786
2017	3,213	9,883	7,834	1,199	39,325	2,306	9,057	15	926

Source: Halifax Regional Police

COMMUNITY

Measures of satisfaction, involvement, and inclusion are important metrics for assessing a city's health and vibrancy. The 2018 City Matters Survey has several interesting findings on these issues.

When asked to rate the overall quality of life in Halifax on a scale from one to 10, 45% of respondents gave a rating

of eight or higher, and only 16% gave a rating below six. The ratings for Halifax as a place to raise a family were even better, with 56% choosing one of the top-three scores, and 16% giving a rating below six. When asked if Halifax was a good place to grow old, the score worsened. Forty-four percent gave a rating of eight or above, but the percentage giving a score below six grew to 25%.

TABLE 17: Citizen Ratings of Quality of Place by Life Cycle Stage

Halifax, Share of Citizen Respondents, 2018

Rating	Overall Quality of Life in Halifax	Good Place to Raise a Family	Good Place to Grow Old
1 to 5 (poor)	16%	16%	25%
6 to 7 (fair)	40%	27%	31%
8 to 10 (good)	45%	56%	44%

Source: MQO Research, City Matters Survey (2018)

Respondents also were asked their views on life in Halifax for various groups within the population.

When asked to rate Halifax as a place where women are respected and treated equally to men, 56% answered either “good” or “excellent” (versus 59% in 2017). A higher percentage of men (62%) gave a “good” or “excellent” rating than did women (51%).

Perceptions as to how tolerant and inclusive Halifax is to immigrants, LGBTQ+ individuals, non-Christians, visible minorities, people with disabilities, and Indigenous people were gauged on a scale of one (poor) to 10 (excellent). Mean scores ranged from a low of 6.8 for both immigrants and Indigenous people to a high of

7.3 for both LGBTQ+ individuals and people with disabilities. In most cases, the 2018 scores were very similar to those from the 2017 survey. The one group for which there was a more sizable shift was Indigenous people, an increase of almost half a point over the 6.4 recorded in 2017.

Turning to broader civic life, respondents were asked if they believe that most people can be trusted. Two-thirds overall replied “yes” with the proportion of “yes” responses rising with age, education, and income. Men were more likely to say “yes” (70%) than women (63%).

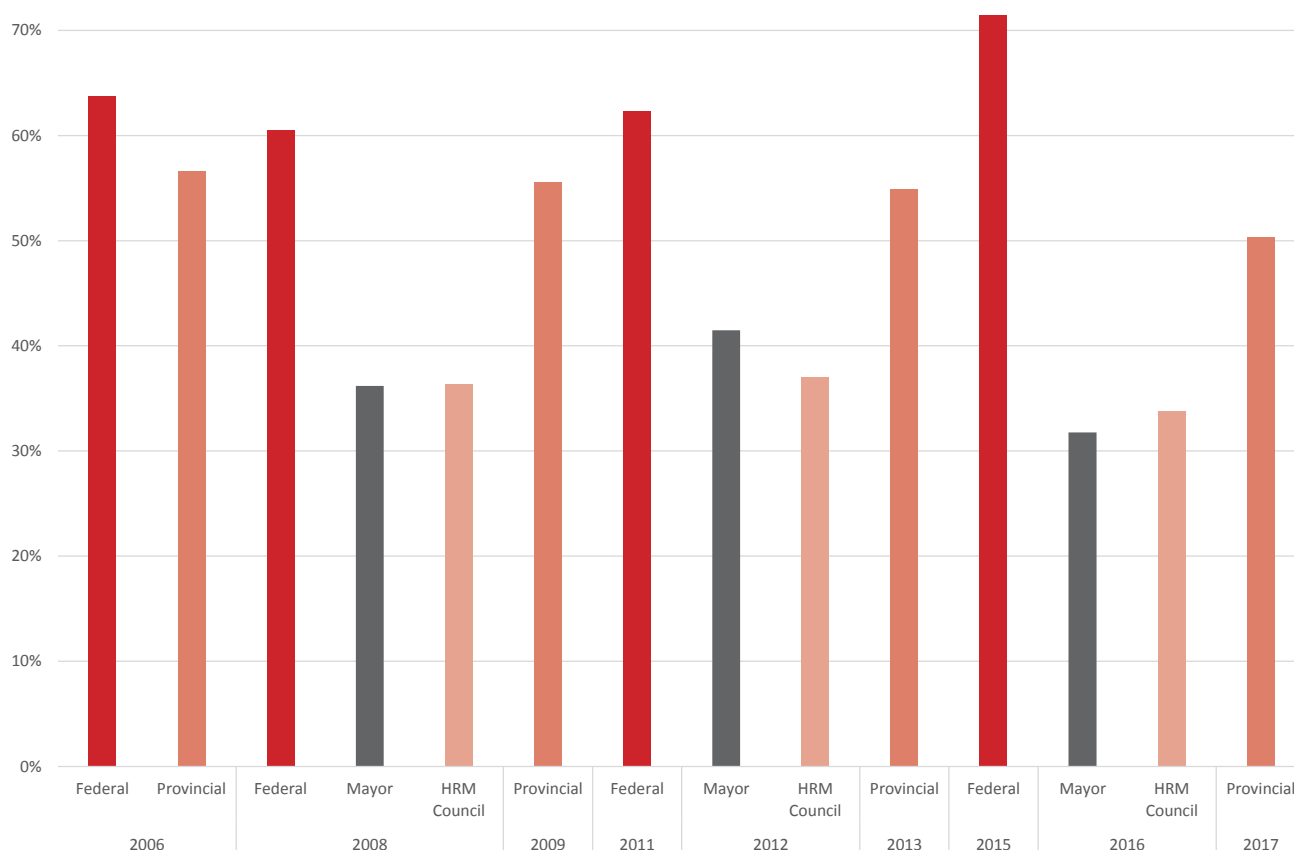
Another indicator of the strength of civic life is voter turnout. Figure 42 shows aggregated voter turnout since 2006 at both the federal

and provincial levels for all ridings that include any part of the municipality, plus the aggregate voter turnout for all council seats (excluding any won by acclamation), and turnout for the mayoral election.

Turnout tends to drop as jurisdictions get smaller. Federal turnout has never fallen below 60% and jumped to a high of 72% in 2015. Provincial turnout drifted slightly downward from 57% in 2006 to 55% in 2013 before falling more sharply to 50% in 2017. Municipal turnout has stayed in the 30% to 40% range with one exception—a 41% figure for the mayoral vote in 2012. In general, the municipal turnout numbers have trended downwards with the lowest levels recorded in 2016.

FIGURE 42: Voter Turnout by Election

Ridings Overlapping Halifax, Share of Eligible Voters*, 2006 to 2017



*Methods for enumerating “eligible voters” varies slightly among jurisdictions.

Sources: Various including Elections Canada, Elections Nova Scotia, and Halifax Regional Municipality

Another indicator of community inclusiveness is the degree to which the community's leaders reflect its population.

Halifax covers, in whole or in part, six federal ridings and 23 provincial ridings. Adding the 16 Council districts plus the Mayor gives a total of 46 elected representatives for the city across the three levels of government.

The 2016 census reports that 52% of Halifax residents are women. However, women account for only 10 (22%) of the city's 46 elected representatives. While 4% of Halifax's population identifies as Aboriginal, there are no Aboriginal members among the 46 elected representatives.

The share of Halifax's population that identifies as Black is also 4%, equal to the share of African Nova Scotians (two out of 46) among elected representatives.

HEALTH

Another important measure of the health of the community is the literal health of the community.

Statistics Canada provides data for a number of chronic health conditions, participation in activities associated with both good and bad health, self-reported perceptions of health, and access to and interaction with the health care system. The most recent data available for Halifax are for 2015-16.

Compared to Canada-wide figures and the six benchmark cities, Halifax has a mix of good and bad scores across the chronic conditions listed in Table 18. Halifax ties for the highest prevalence of asthma and is close to the highest rate for diabetes but has the second-best figure for high blood pressure. Halifax's rate of overweight and obesity among youth is the highest among all six benchmark cities and substantially higher than most. However, Halifax lands in the middle of the pack for adult overweight and obesity.

TABLE 18: Prevalence of Chronic Health Conditions

Benchmark City Health Regions, Population Ages 12 and Older, 2015-16

	Canada	Halifax	St. John's	Québec City	Waterloo	Regina	Victoria
Asthma	8.5%	9.8%	6.3%	6.0%	9.8%	9.2%	7.6%
Diabetes	6.9%	8.0%	8.6%	5.9%	6.6%	8.5%	5.6%
High blood pressure	17.3%	16.0%	22.4%	17.3%	17.3%	18.0%	13.7%
Overweight or obese, youth (12-17)	25.7%	35.1%	33.2%	26.6%	16.3%	22.7%	12.0%
Overweight, adult (18+)	35.8%	35.5%	32.1%	36.4%	35.2%	39.4%	38.2%
Obese, adult (18+)	26.3%	29.6%	38.8%	21.9%	28.9%	29.7%	20.4%

Source: Statistics Canada, Canada Community Health Survey

Halifax posts good figures in terms of physical activity for both youth and adults, exceeding the Canada-wide figure and ranking second only to Victoria. The juxtaposition of Halifax's good score on physical activity for youth and its high rate of youth obesity is puzzling. In terms of good (fruit and vegetable) and bad (alcohol and tobacco) consumption, Halifax rates are worse than the Canadian average and rank second or third worst among comparator cities.

TABLE 19: Participation in Activities with Impact on Health
Benchmark City Health Regions, Population Ages 12 and Older, 2015-16

	Canada	Halifax	St. John's	Québec City	Waterloo	Regina	Victoria
Fruit and vegetable consumption, 5 times or more per day	30.8%	24.9%	22.0%	40.9%	33.9%	27.0%	37.0%
Heavy drinking	19.1%	23.4%	26.2%	25.4%	20.3%	21.9%	17.5%
Physical activity, average 60 minutes per day, youth (12 to 17)	59.8%	70.3%	61.3%	53.2%	60.4%	56.3%	79.9%
Physical activity, 150 minutes per week, adult (18+)	57.7%	61.4%	52.7%	56.8%	58.0%	53.8%	67.6%
Smoking, daily	12.4%	13.5%	17.1%	10.2%	13.3%	16.6%	8.5%

Source: Statistics Canada, Canada Community Health Survey

TABLE 20: Self-reported Perceptions of Health Status
Benchmark City Health Regions, Population Ages 12 and Older, 2015-16

	Canada	Halifax	St. John's	Québec City	Waterloo	Regina	Victoria
Perceived health, fair or poor	11.0%	10.6%	14.3%	6.1%	12.1%	9.2%	11.1%
Perceived mental health, fair or poor	6.4%	8.6%	5.6%	2.4%	7.6%	8.0%	5.8%

Source: Statistics Canada, Canada Community Health Survey

The percentage of Halifax respondents reporting their health status as only fair or poor is close to the national average and is in the middle of the comparator city range. With regard to mental health though, Halifax has the highest percentage reporting their status as only fair or poor.

Lack of access to a family doctor is a high-profile issue in Halifax and, indeed, across Nova Scotia. Interestingly, though, Halifax ranks third-best among benchmark cities in terms of those reporting they have a regular health care provider.

TABLE 21: Access to a Regular Health Care Provider
Benchmark City Health Regions, Population 12 and Older, 2015-16

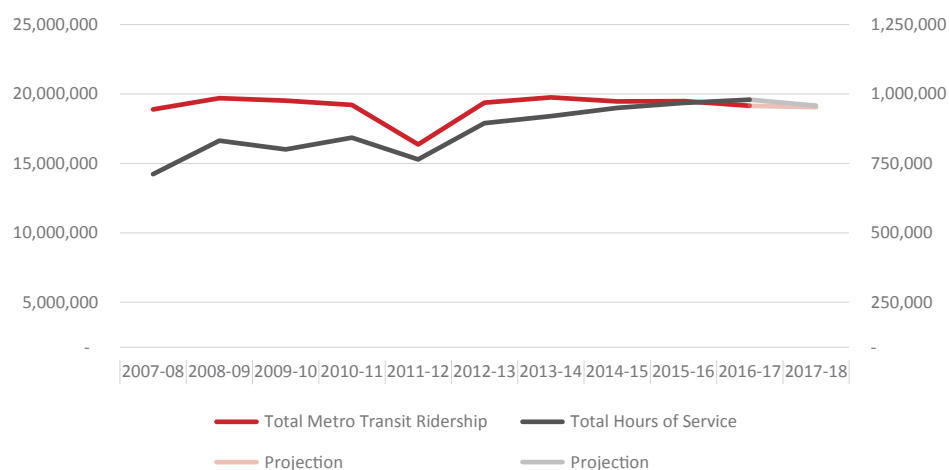
	Canada	Halifax	St. John's	Québec City	Waterloo	Regina	Victoria
Has a regular health care provider	83.6%	87.0%	92.2%	76.0%	90.5%	82.1%	81.6%

Source: Statistics Canada, Canada Community Health Survey

TRANSPORTATION

Total hours of transit services are projected to decrease for the first time in five years to 958,000. The estimated ridership for 2017-18 was 19.1 million, down about 100,000 riders from 2016-17. This marks the second straight year that ridership has declined. Halifax Transit initiated 15-minute weekday service from 7:00 a.m. to 8:00 p.m. for the Alderney Ferry on a trial basis in February 2018.

FIGURE 43: Transit Passenger Volume and Hours of Service
Halifax, 2007 to 2018



Source: Halifax Regional Municipality – Halifax Transit

The 2018 City Matters Survey asked about both satisfaction with current transit service and opinions on potential new transit options. On all four questions related to the frequency, speed, convenience, and cost of bus service, mean scores for 2018 were up from 2017 levels.

When asked about the possible introduction of a commuter rail system to Halifax, 66% of respondents

either supported or strongly supported a new commuter rail system, and 46% of respondents stated that they would be somewhat likely or very likely to use the commuter rail as their primary means of transportation if it were available in their neighbourhood. Note, however, that these questions were asked without reference to the capital costs associated with building a commuter rail system or individual fares to use a commuter rail system.

TABLE 22: Citizen Ratings of Public Transit

Halifax, Scores of 1 ("Very Poor") to 10 ("Excellent"), 2017 to 2018

	2017 Mean Score	2018 Mean Score
Buses stop close to where you live and work	6.7	6.9
Buses run on schedules that are convenient for you	5.5	5.9
Buses arrive frequently and wait times are short	5.4	5.8
Affordability of public transit	6.6	6.7

Source: MQO Research, City Matters Survey

ENVIRONMENT

Last year's *Index* reported that the city had one of the highest waste-diversion rates in the country as of 2014-15 at 61% and that even higher targets—63% in 2016-17 and 65% by 2019-20—had been set for the future. Table 23 shows that the municipality's performance remained steady in 2015-16, the latest year for which data is available, but that significant improvement will be required to hit the specified targets.

In terms of renewable energy, the 2016-17 Accountability Report from the Nova Scotia Department of Energy states that the province is on track to reach its 2020 target of having 40% of total electricity generation come from renewable sources such as wind, tidal, biomass, and hydroelectric power. In 2017, 29% of Nova Scotia's electricity was supplied by renewable sources.

TABLE 23: Waste Diversion Rate

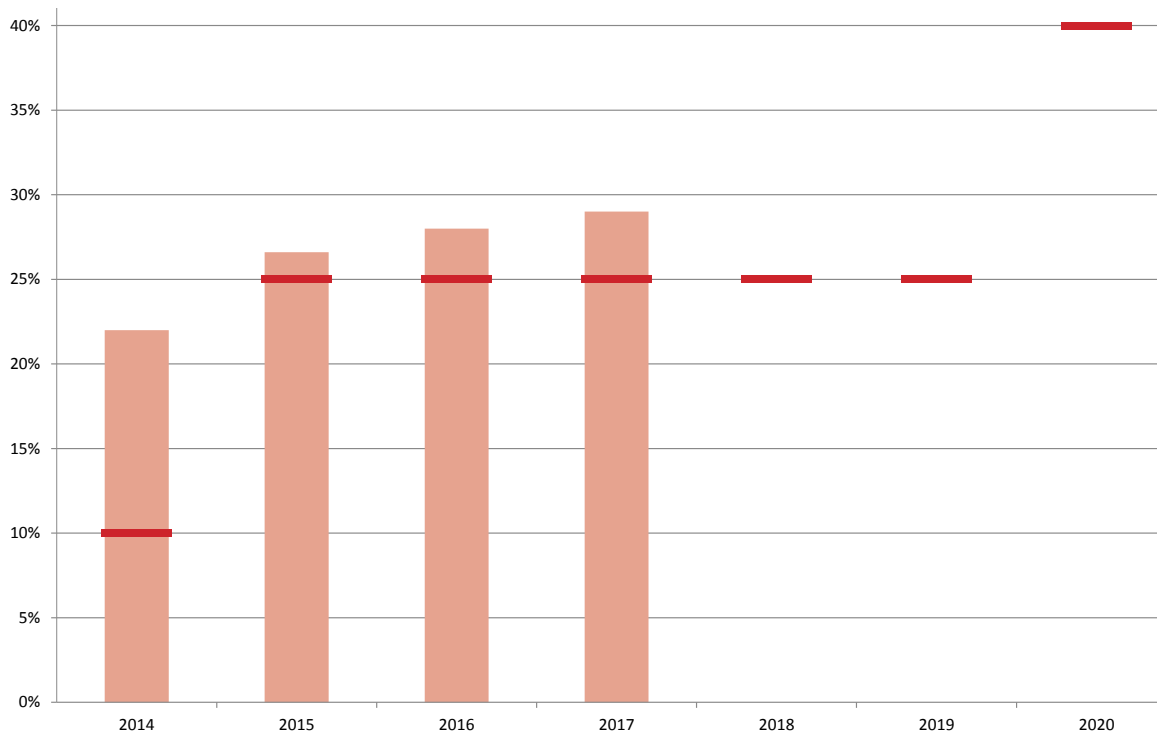
Halifax, 2007 to 2016

Waste Diversion	
Year	Diversion Rate
2007-08	56%
2008-09	59%
2009-10	60%
2010-11	61%
2011-12	61%
2012-13	61%
2013-14	61%
2014-15	61%
2015-16	61%

Source: Halifax Regional Municipality—Transportation and Public Works

FIGURE 44: Renewable Energy Supply and Requirements

Nova Scotia, Share of Total Supply, 2014 to 2020



Source: Nova Scotia Power, Renewable Electricity Regulations

Actual Supply Minimum Requirement



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