CITIZEN PERSPECTIVE

2017 Citizen Survey

Winnipeg

**Survey conducted by Prairie Research Associates
May 2017**

What is Market Research?

- The process of gathering information to learn more about how customers and potential customers perceive products or services

- Market research can cover a broad spectrum of activities
  - A short customer satisfaction questionnaire
  - Studying demographic data for your area
  - Contract with a professional market research firm to do a broader survey

- Why do market research?
  - To understand your customers and their preferences
  - To support evidence-informed business decisions
  - Regular research allows a business to understand and adapt to changing needs

> Successful businesses have extensive knowledge of their customers and their competitors.

Survey Method

- Conducted by Prairie Research Associates, Inc.
    - Prairie Research Associates (2001, 2002, 2015, 2016, and 2017)
    - Market Dimensions (2009, 2010, 2011, 2013 and 2014)
    - Dimark (2012)
    - Telelink (2007)
    - Kisquared (2004)
    - Acumen Research (2003)
    - No survey conducted (2005, 2006 and 2008)

- A random telephone survey

- 600 Winnipeggers surveyed in first two weeks of May 2017
    - Results in a margin of error of ±4.0%, 19 times out of 20.

- Data presented is based on people who answered the survey question
    - (excludes "don't know" / refused responses)

Who Were the Survey Respondents?

The survey was administered to those who indicated they:

- Are 18 years or older

- Have lived in Winnipeg (or pay taxes to the City) for at least one year

- Agreed to participate in the survey

    – *"This evening we're talking to residents of Winnipeg regarding issues affecting the City. The survey will take approximately 15 minutes to complete."*

Winnipeg

- As part of the survey, some demographic details are asked to assist in the interpretation of results

  – Age

  – Own / rent property

  – Education

  – Household income

  – Postal code (to identify area of city)

Survey Sampling Methodology

- Statistically valid survey results are obtained by using an adjusted quota sampling methodology
    - Sample quotas for gender, age and cellphones are applied
    - Results are 'weighted' to statistically represent Winnipeg's population
- Obtaining an exact 'representative sample' results in significant additional costs with limited improvement in statistical accuracy
- An additional quota of 27% inner city residents is applied to ensure geographic representation of this group

WEIGHTING applied

Survey Sample Quotas

Gender

60% - Female
40% - Male

Age

15% - 18 to 34
17% - 35 to 44
45% - 45 to 64
23% - 65+

Cellphone

25% cellphone
(20% minimum)

Approximate Winnipeg Population (%)

Category	Percentage
Female	51%
Male	49%
18 to 34	28%
35 to 44	20%
45 to 64	34%
65+	18%
Cellphone	30%
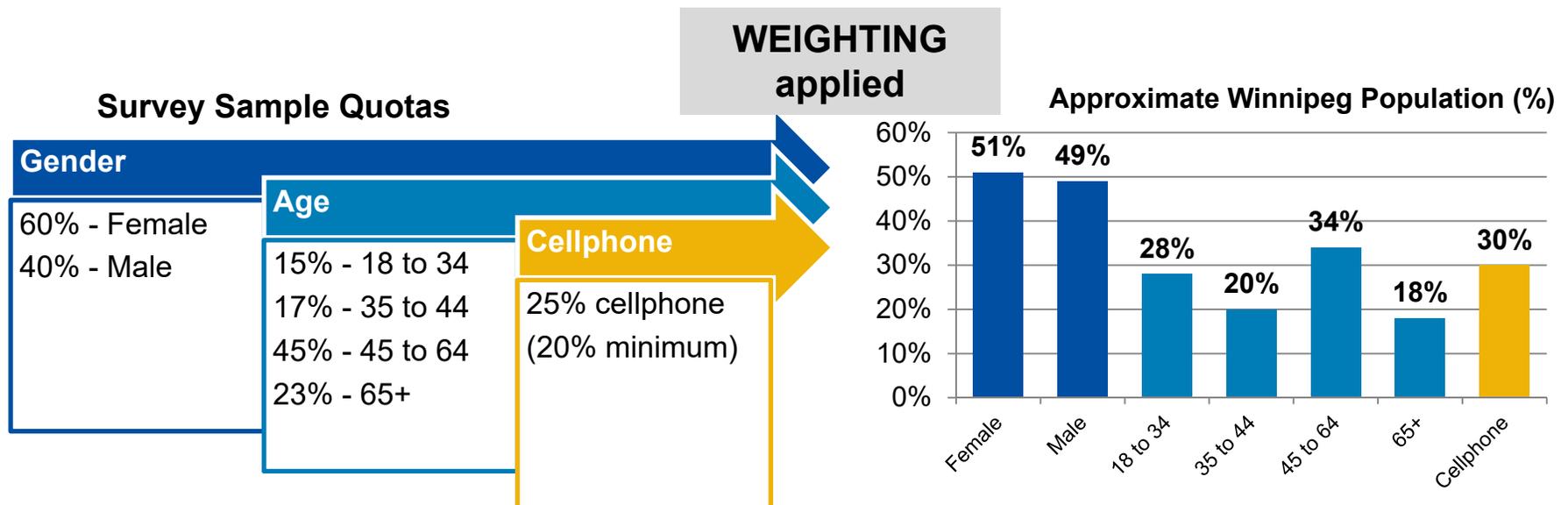
THE RESULTS

2017 Overall Satisfaction

Quality of Life

2015	2016	2017
90%	94%	92%

Value for Tax Dollars

2015	2016	2017
62%	68%	70%

Net Promoter Score (Recommendation)

9

Overall City Services

2015	2016	2017
86%	85%	88%

Customer Service

2015	2016	2017
72%	79%	83%

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.

Net Promoter Score Value = 9

- **Citizens were asked "*On a scale from 0 to 10, where 0 is not at all likely and 10 is very likely, how likely would you be to recommend Winnipeg as a place to live?*"**

- Net Promoter Score (NPS®) is an index ranging from -100 to +100 that measures the willingness of a customer to recommend a company's products or services to others. It implies a customer's overall satisfaction and loyalty with a company.
  - 0 or less is considered 'poor'
  - Between 0 and 50 is considered 'good'
  - Above 50 is considered 'excellent'

- The score is calculated by subtracting *Detractors* (rating of 6 or lower out of 10) from *Promoters* (9 or 10 out of 10)

> **+ 32% Promoters**
> **- 23% Detractors**
> **= 9 NPS Value**

Detractors **23%** — Passives **45%** — Promoters **32%**
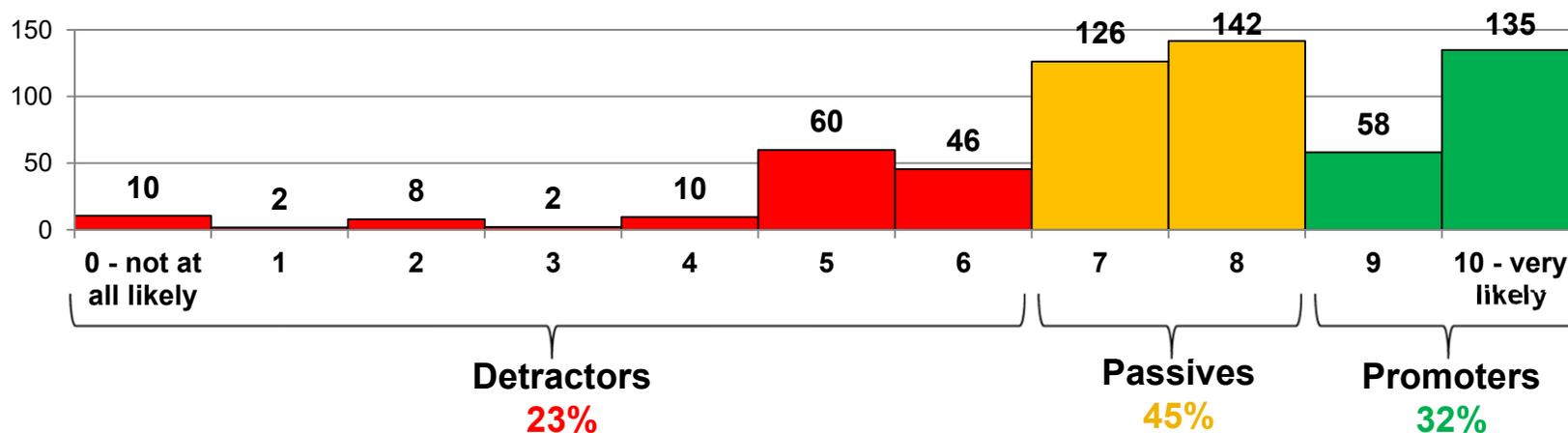
QUALITY OF LIFE

Quality of Life

- In 2017, 92% of Winnipeggers rate the overall quality of life in Winnipeg today as very good or good.

Citizens were asked "How would you rate the quality of life in Winnipeg?"

■ **Very Good**   ■ **Good**   ■ **Poor**   ■ **Very Poor**

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
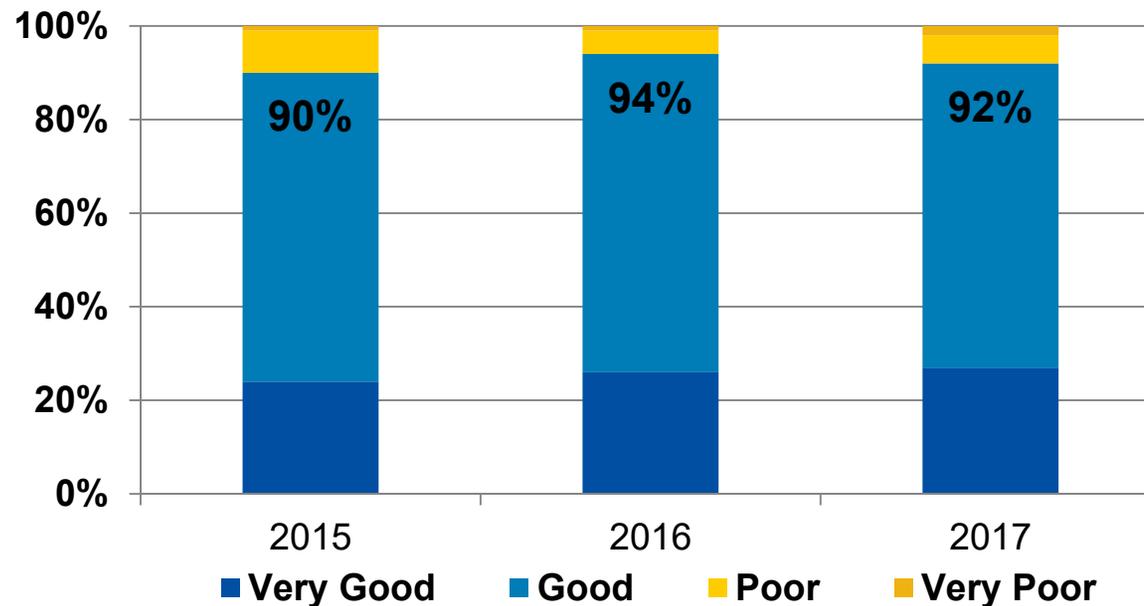
Quality of Life Statements

	2015	2016	2017
	90%	94%	92%

Legend:
- somewhat agree
- strongly agree

It is easy to get around in Winnipeg by car

2015	2016	2017
88	88	90
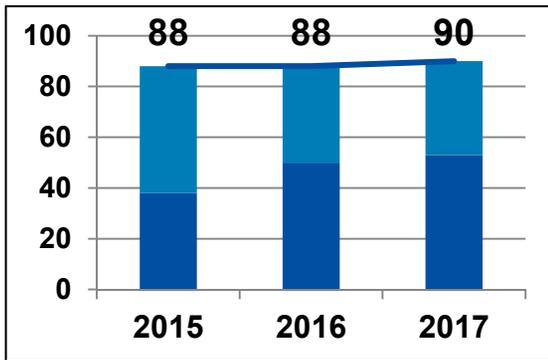
It is easy to get around in Winnipeg by transit

2015	2016	2017
66	71	72
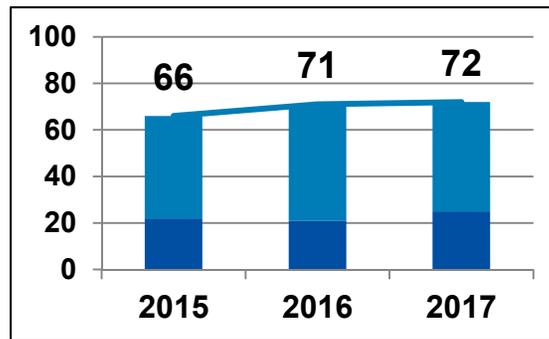
It is easy to get around in Winnipeg by bicycle

2015	2016	2017
47	54	63
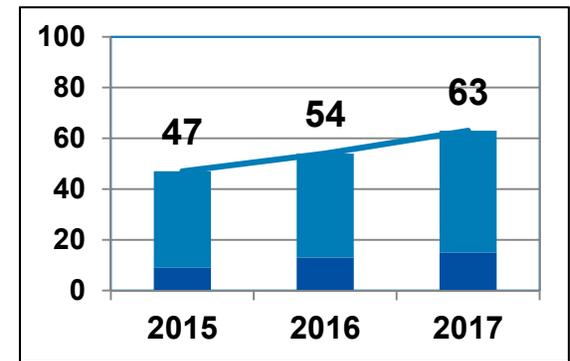
It is easy to get around in Winnipeg by walking

2015	2016	2017
77	76	81
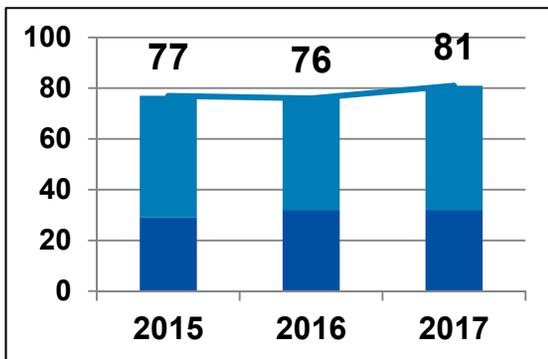
I feel safe walking alone at night in my neighborhood

2015	2016	2017
74	72	74
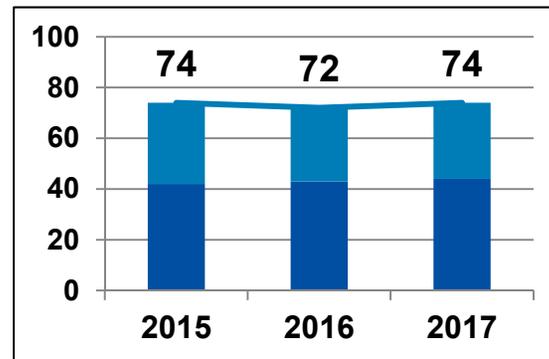
I feel safe walking alone at night in the downtown
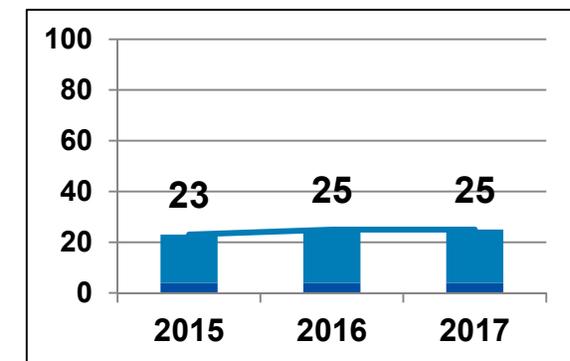
2015	2016	2017
23	25	25

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.

Actions to Improve Quality of Life – Annual Trend

Quality of Life

2015	2016	2017
90%	94%	92%

Citizens were asked "What actions do you think the City of Winnipeg could take to improve the quality of life in the city?"

Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.

Legend: 2015, 2016, 2017

Data labels (2017): Roads / Infrastructure 41%, Crime / Policing 15%, Transit 8%, Economy 7%, City Beautification / Parks 7%, Housing 7%, Poverty 7%, City Planning 6%, Taxation 5%, Bicycle & Walking Trails 5%, More things to do 5%
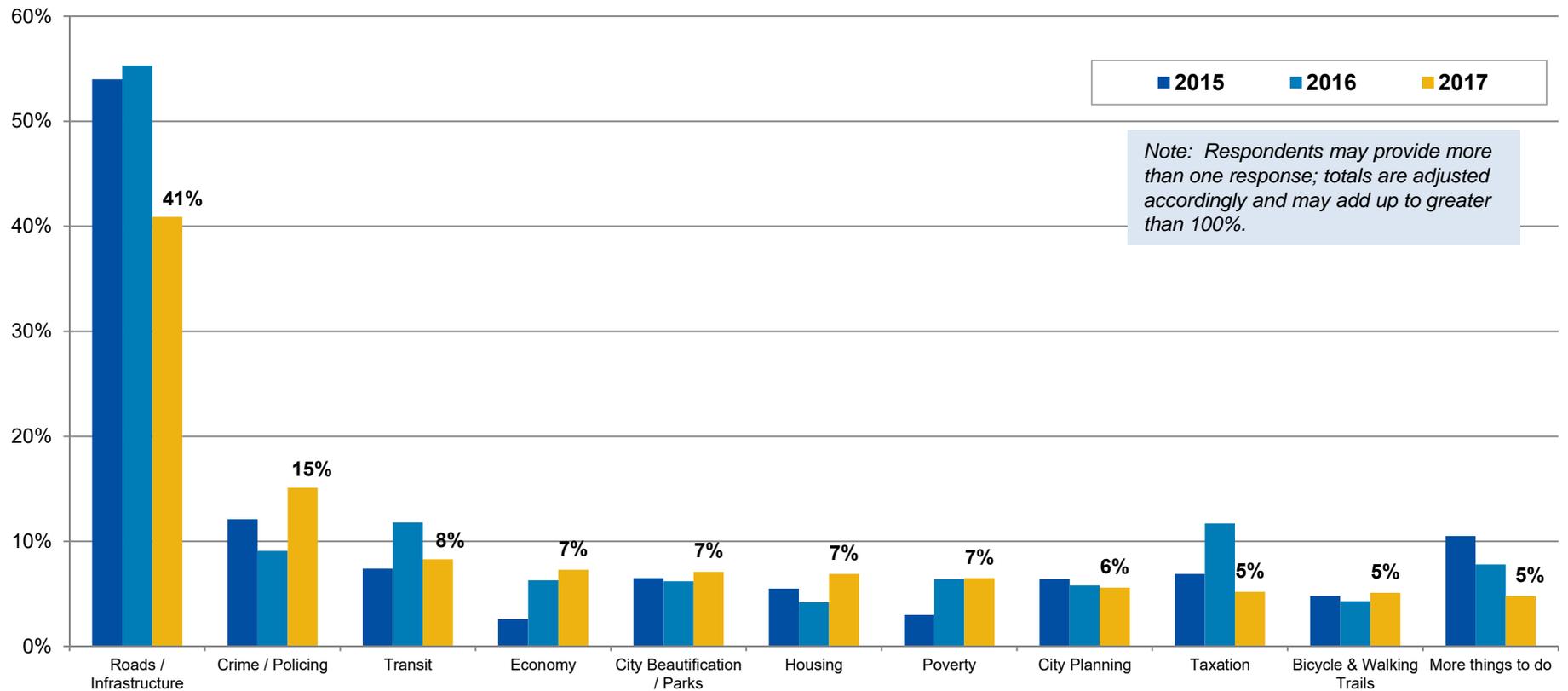
The chart above compares groupings of suggested actions over the last three years.

Actions to Improve Quality of Life – Annual Trend

Quality of Life

2015	2016	2017
90%	94%	92%

Citizens were asked "What actions do you think the City of Winnipeg could take to improve the quality of life in the city?"

When these suggested actions were compared to respondents' quality of life response, the following improvement areas were the most suggested:

Quality of Life is Good / Very Good (92%)	**Quality of Life is Poor / Very Poor (8%)**
• Roads / Infrastructure • Crime / Policing • Transit	• Crime / Policing • Roads / Infrastructure • Poverty

VALUE FOR TAX DOLLARS

Value for Tax Dollars

Citizens were asked "Considering the services provided by the City for your property tax dollars, do you feel you receive…"
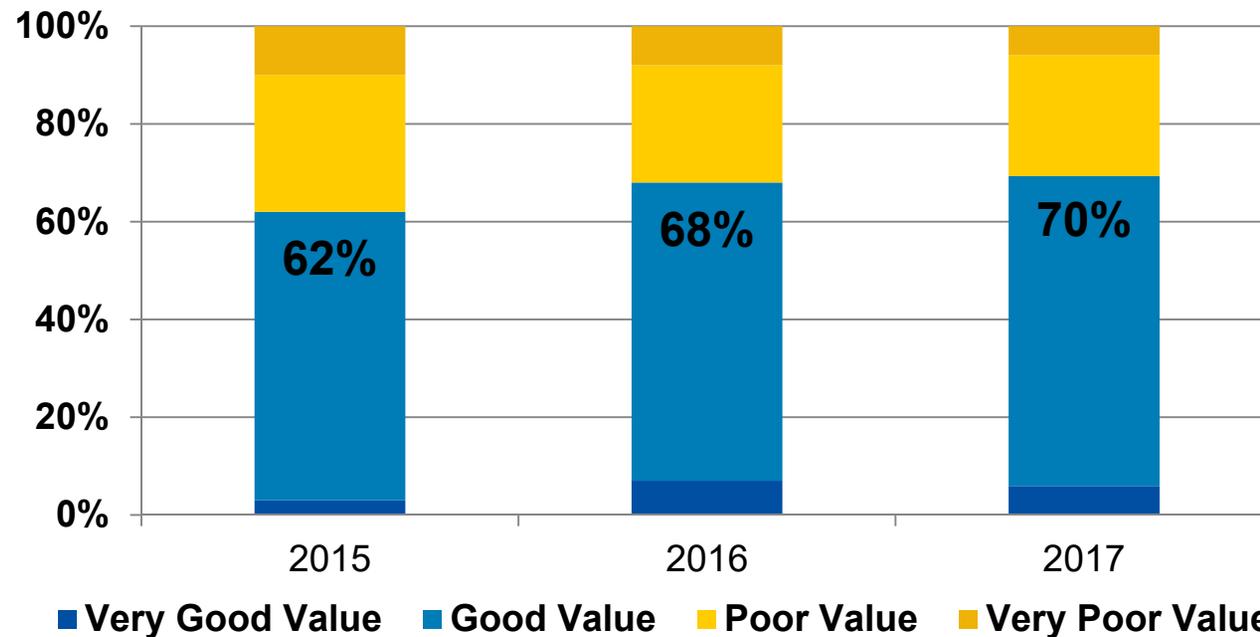
- In 2017, 70% of Winnipeggers believe there is good to very good value in their municipal tax dollar.
- This is the highest level over the last three years.

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.

Reason for 'Value Received for Tax Dollars'

Citizens were asked "Why do you feel you receive _____ value from your property tax dollars?"

Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.

Value for Tax Dollars

Legend:
- Good/Very Good (70%)
- Poor/Very Poor (30%)

Category	Good/Very Good	Poor/Very Poor
City Planning / Spending	51%	48%
Services	41%	34%
Other	13%	13%
Roads / Infrastructure	12%	46%
Safety / Policing	11%	6%
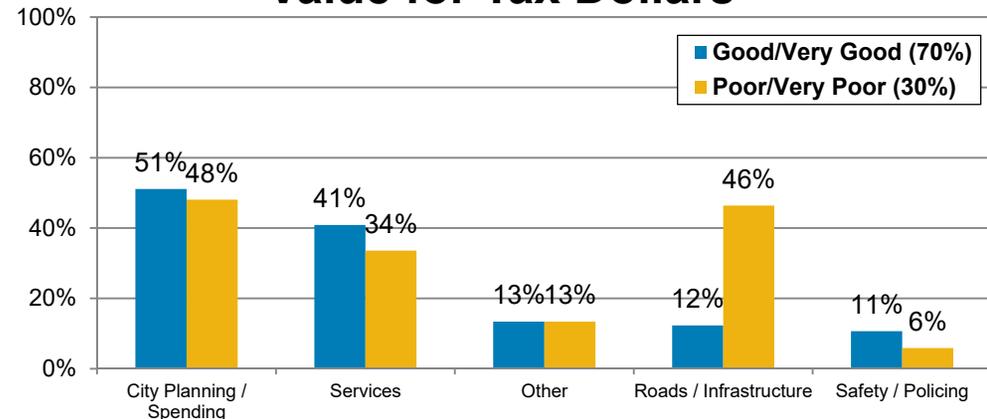
When these suggested reasons were compared to respondents' 'value received' response, the following reasons were shared:

Most common reasons for Good / Very Good (70%)

- Satisfied with the City's planning and spending decisions
  - feel the City is doing the best it can
- Satisfied with specific services
  - snow clearing
  - garbage/recycling
  - street cleaning

Most common reasons for Poor / Very Poor (30%)

- Dissatisfied with the City's planning and spending decisions
  - feel taxes/fees are too high
- Dissatisfaction with condition of roads
- Dissatisfied with specific services
  - primarily snow clearing

SATISFACTION WITH CUSTOMER SERVICE

Satisfaction with Customer Service

Customer Service		
2014	2015	2016
72%	79%	83%

- In 2017, 83% of Winnipeggers who contacted the City in the last year were satisfied or very satisfied with the experience.
- This is the highest level over the last three years.

■ Very Satisfied   ■ Somewhat Satisfied
■ Somewhat Dissatisfied   ■ Very Dissatisfied

Contact with the City

Have you contacted the City in the last year?
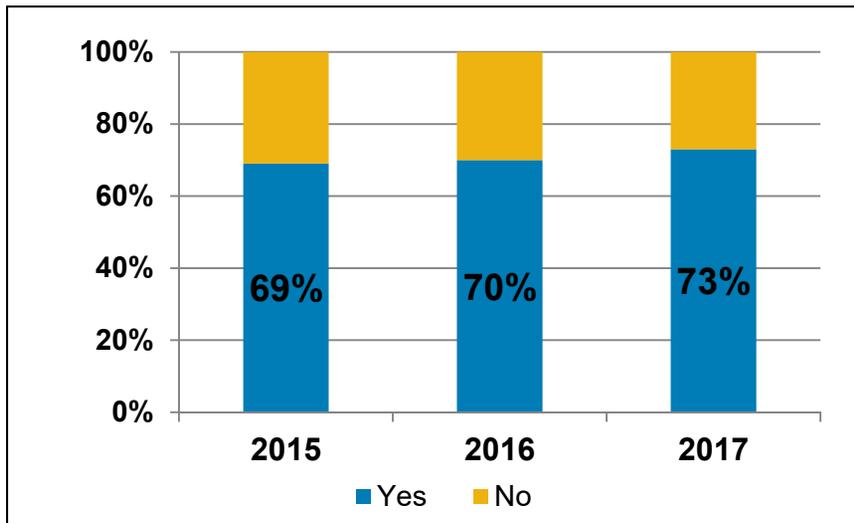
How did you contact the City?
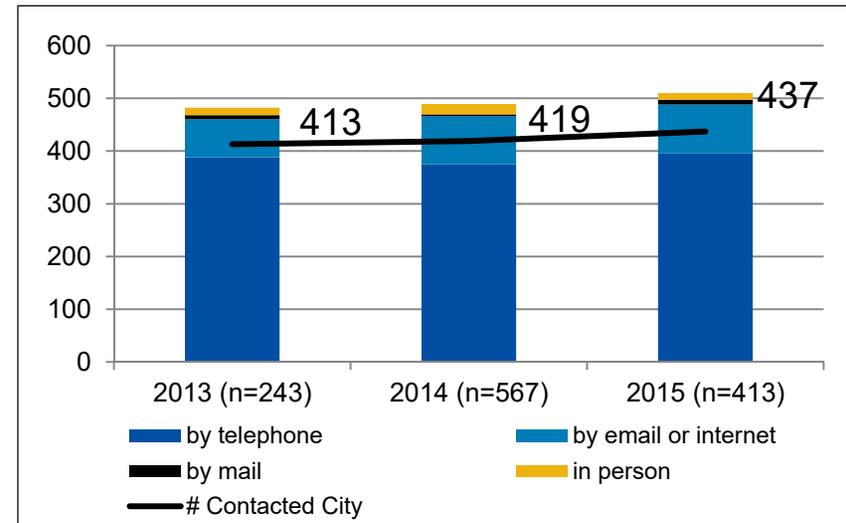
Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.

- 73% of the respondents indicated they have contacted the City in the past year.

- Contact by email/internet is increasing, while contacts by telephone remain fairly consistent.

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.

Customer Service Details

2014	2015	2016
72%	79%	83%

Citizens were asked "Thinking about your personal dealings with the City of Winnipeg and your general impressions…"
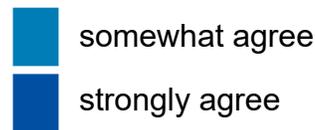
City staff are courteous, helpful and knowledgeable

- somewhat agree
- strongly agree
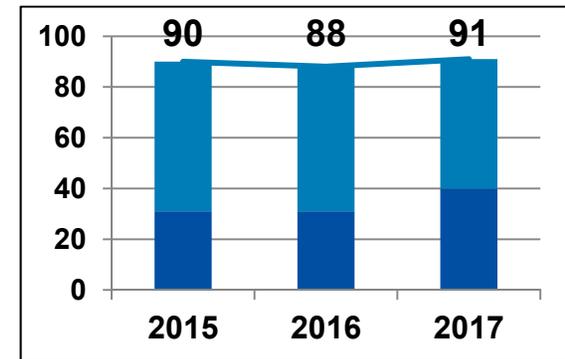
The quality of service from the City is consistently high
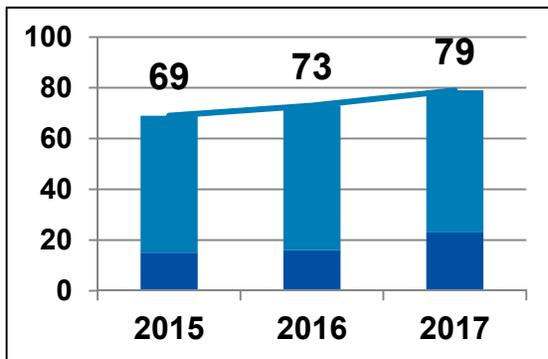
The City responds quickly to requests and concerns
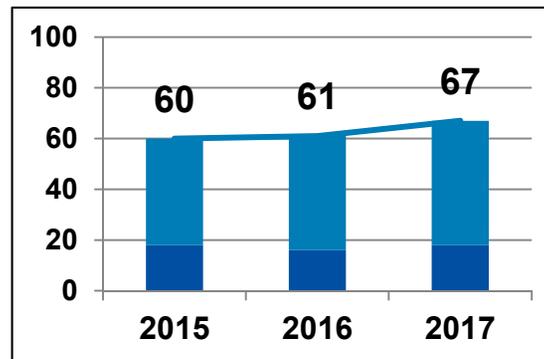
City staff are easy to get a hold of when I need them

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
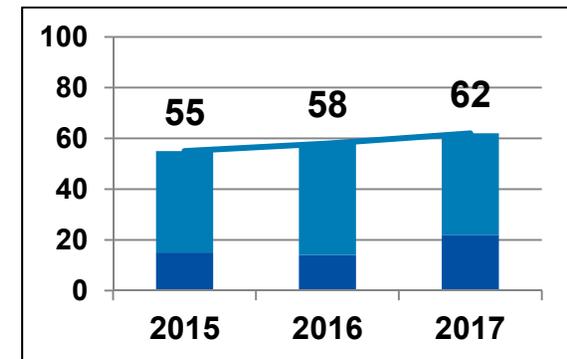
Improvement to Customer Service

Winnipeg

Citizens were asked "How could the City's customer service be improved?"

Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.

Customer Service Improvements

Legend:
- Satisfied/Very Satisfied (83%)
- Dissatisfied/Somewhat Dissatisfied (17%)

Category	Satisfied	Dissatisfied
Staffing Levels / Availability	29%	44%
Staff Contact	26%	44%
Systems	13%	25%
Other	6%	6%
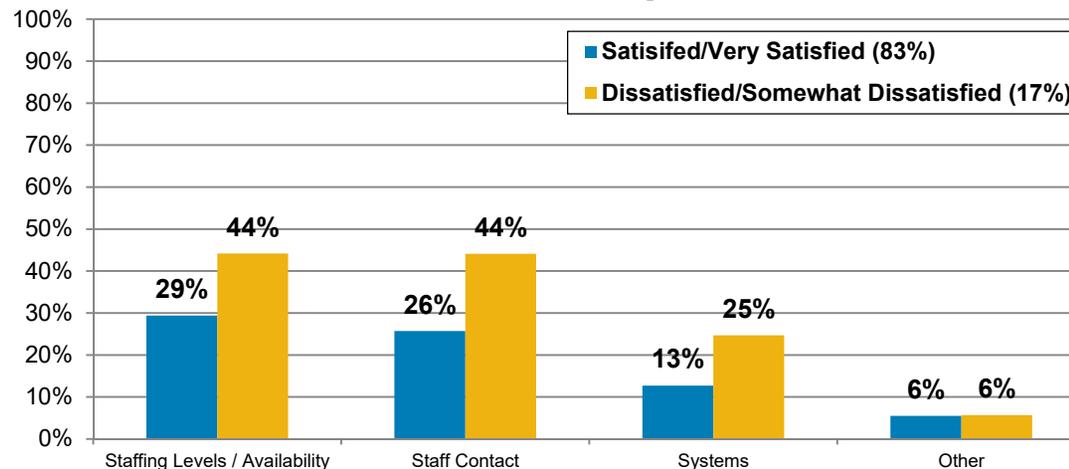
When these suggested reasons were compared to respondents' level of satisfaction with customer experience, the following improvements were noted:

Satisfied with Customer Experience (83%)	**Dissatisfied with Customer Experience (17%)**

Satisfied with Customer Experience (83%)
- Improve staffing levels / wait time
- Improvements to staff contact

Dissatisfied with Customer Experience (17%)
- Improvements related to staff contact
  - About half within the call centre, and half in the handling of their complaint
- Improve staffing levels / wait time

SATISFACTION WITH CITY SERVICES

Overall Satisfaction with City Services

- In 2017, 88% of Winnipeggers are satisfied with the overall level of services provided.

Legend: ■ Very Satisfied ■ Somewhat Satisfied ■ Somewhat Dissatisfied ■ Very Dissatisfied

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
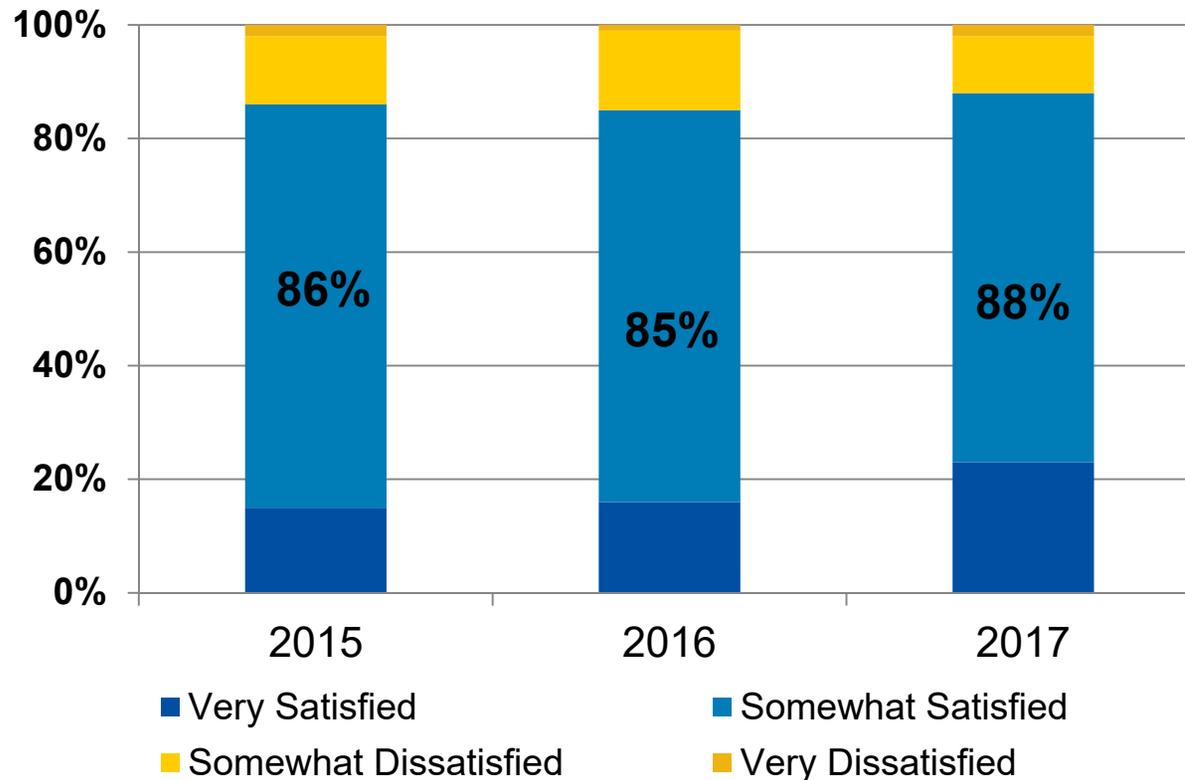
Importance of Service Areas

Citizens were asked "Please rank the following group of services in order of importance"

1= most important   4= least important

Service Area	Importance (weighted)	% Ranked 1 and 2	As compared to 2016
Public Safety (Fire Paramedic, Police)	1.7	82%	⬆
Infrastructure (Roads, Water)	2.1	68%	⬆
Community Services (Libraries, Recreation)	2.8	35%	⬇
Property & Development (Land use planning)	3.3	17%	⬌

INDIVIDUAL SERVICES BY DEPARTMENT

Citizens were asked:
"Now, I'm going to read you a list of services that are provided by the City of Winnipeg. Please tell me whether you are very dissatisfied, somewhat dissatisfied, somewhat satisfied or very satisfied with each of the following services."

Public Works

Overall City Services

2015	2016	2017
86%	85%	88%

Snow Removal

2015	2016	2017
71	73	73
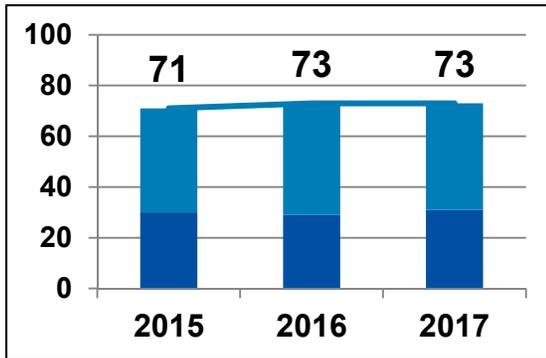
Condition of major streets

2015	2016	2017
43	45	48
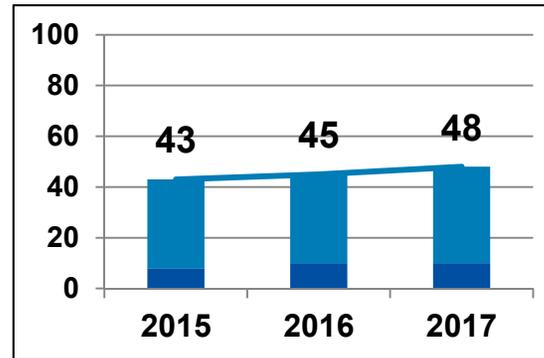
Condition of residential streets

2015	2016	2017
53	44	49
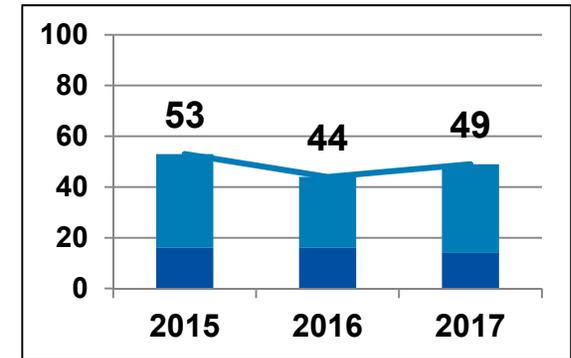
Management of rush hour traffic flow

2015	2016	2017
47	47	51
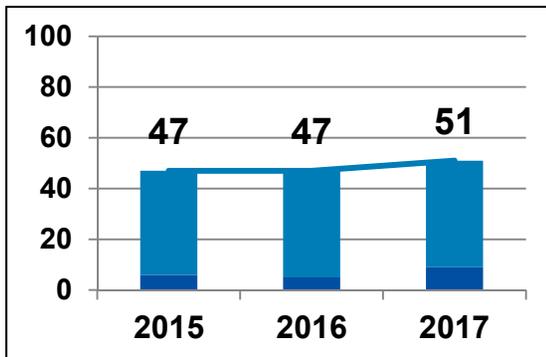
City's efforts in keeping the city clean & beautiful

2015	2016	2017
71	71	69

Legend:
- somewhat satisfied
- very satisfied
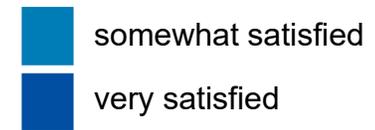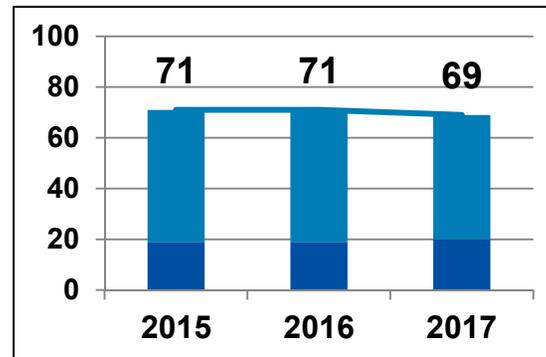
Public Works (cont'd)

Condition of local parks
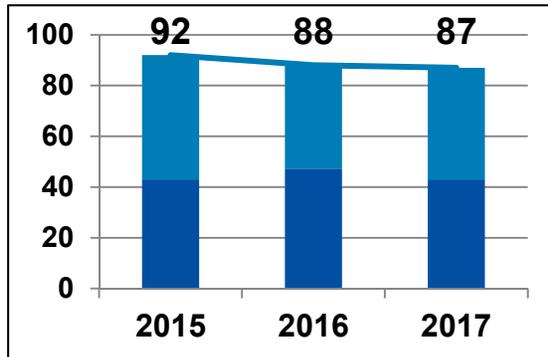
Condition of major parks*

Insect Control

somewhat satisfied

very satisfied

* Those who indicated they have used the service.

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
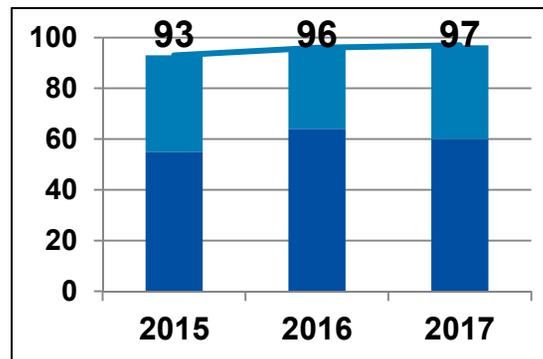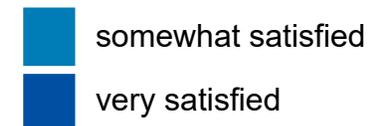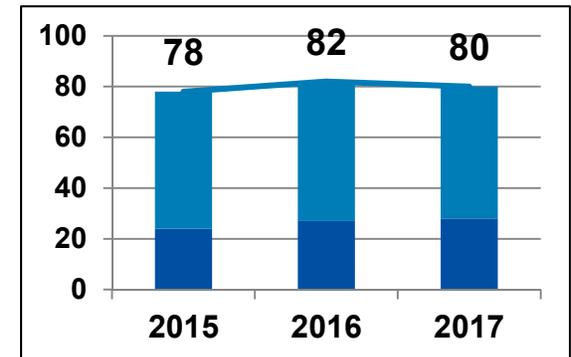
Police Service

Overall City Services

2015	2016	2017
86%	85%	88%

Enforcement of traffic laws
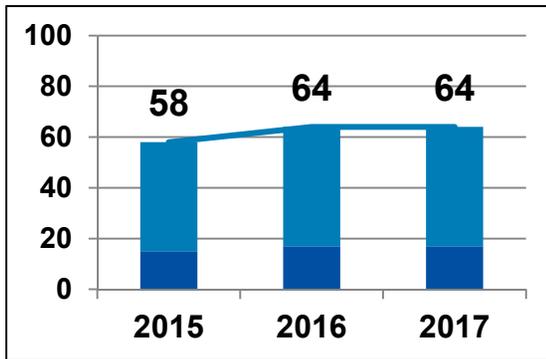
Efforts in crime control
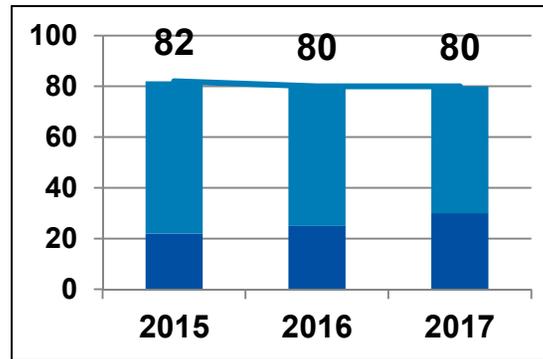
Police response to 911 calls*

■ somewhat satisfied
■ very satisfied
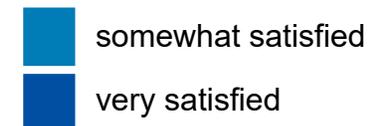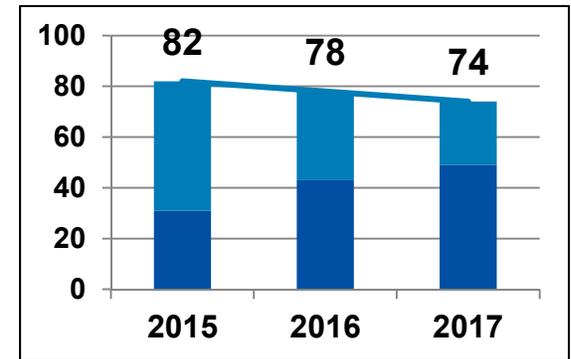
Those who indicated they have used the service.

Community Services

2015	2016	2017
86%	85%	88%

City's efforts to ensure residential property standards are met through inspections

Bar chart:
- 2015: 70
- 2016: 73
- 2017: 72
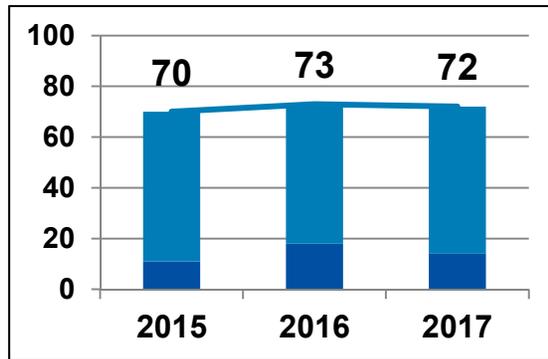
City support for arts, entertainment, & culture

Bar chart:
- 2015: 83
- 2016: 88
- 2017: 89

Public Libraries*

Bar chart:
- 2015: 97
- 2016: 95
- 2017: 95

City-operated recreation programs*

Bar chart:
- 2015: 95
- 2016: 90
- 2017: 90
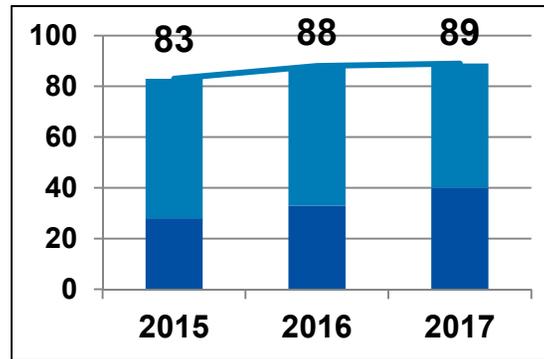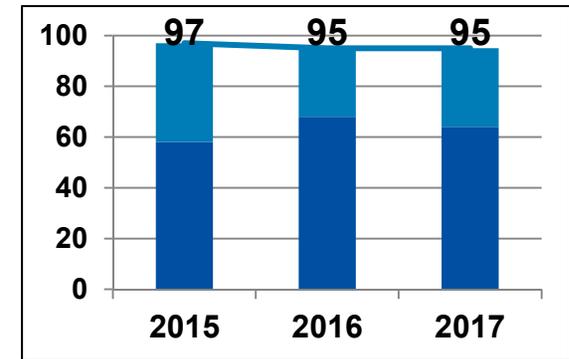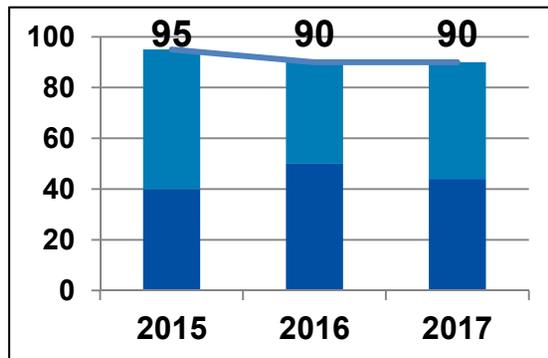
Condition of City-operated recreation facilities*

Bar chart:
- 2015: 82
- 2016: 82
- 2017: 86

Legend:
- somewhat satisfied
- very satisfied

* Those who indicated they have used the service.

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.

Fire Paramedic Service

Fire & rescue response to fire emergencies
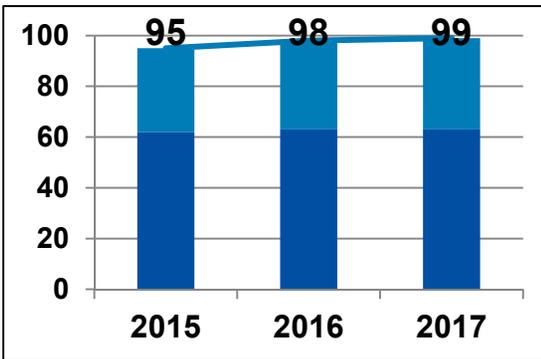
Level of City preparedness to respond, assist
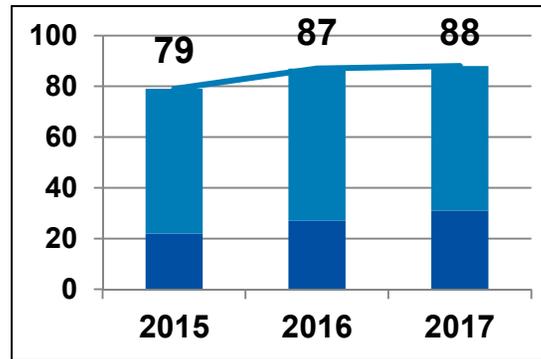
Emergency response capability for medical emergencies*
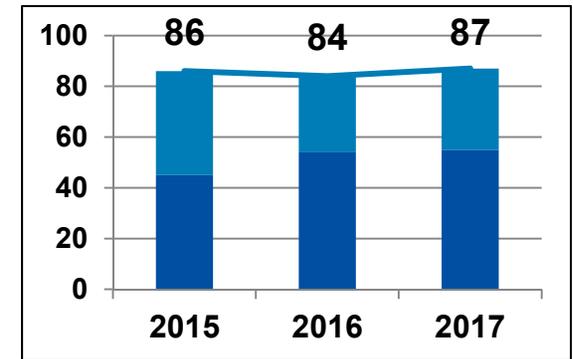
Safety of existing buildings through fire inspections & enforcement
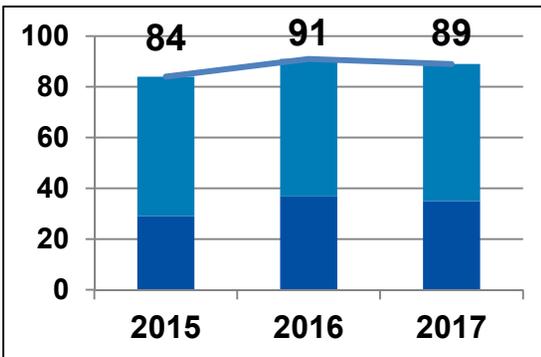
Fire & injury prevention education
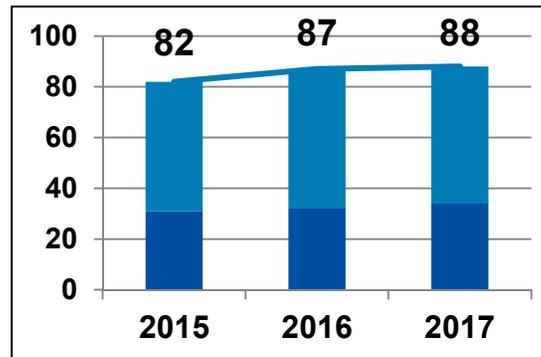
■ somewhat satisfied
■ very satisfied

Those who indicated they have used the service.

Planning, Property & Development

2015	2016	2017
86%	85%	88%

Legend:
- somewhat satisfied
- very satisfied
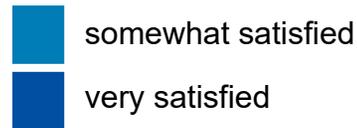
City funding for improving inner city housing

2015	2016	2017
58	59	54

Downtown renewal

2015	2016	2017
71	77	77
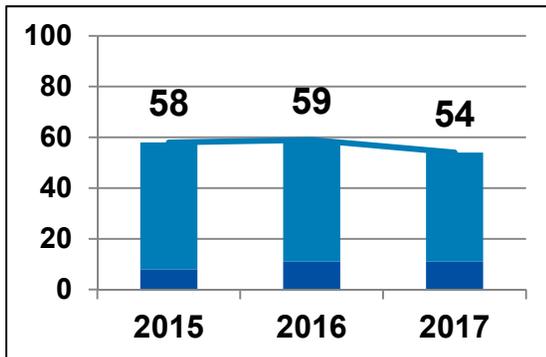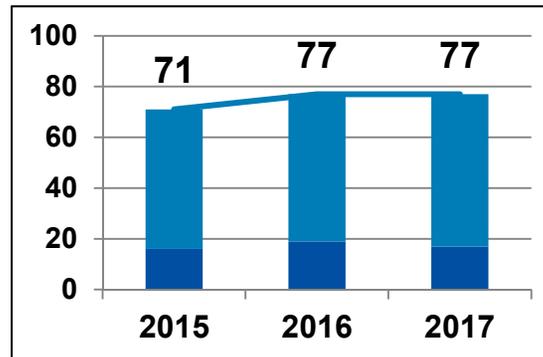
Community planning (to guide growth & change)

2015	2016	2017
59	64	64
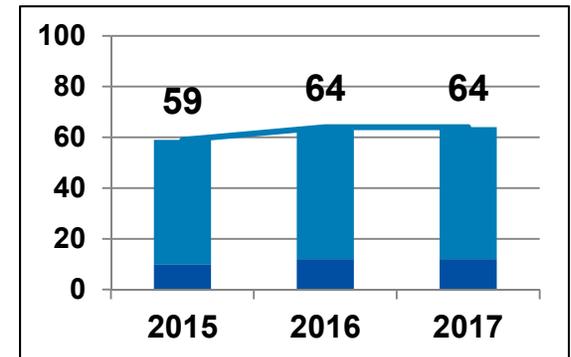
City's effort in promoting economic development

2015	2016	2017
83	74	80
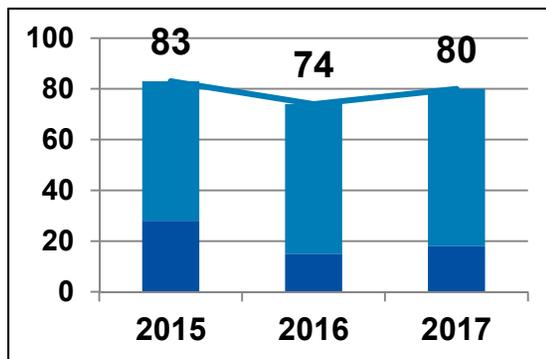
City's efforts in preserving heritage buildings

2015	2016	2017
85	82	85
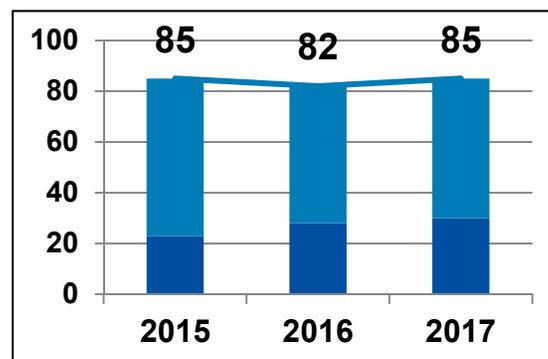
Zoning regulations & building permits to regulate building & property development
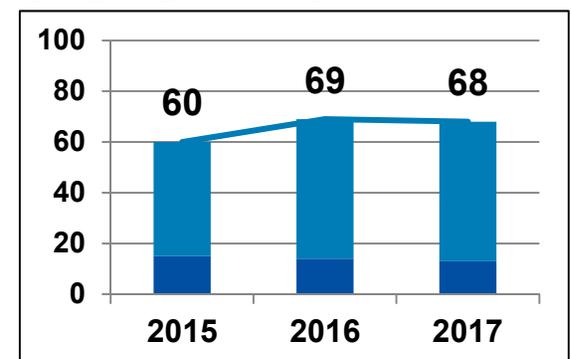
2015	2016	2017
60	69	68

Water and Waste

2015	2016	2017
86%	85%	88%

Garbage collection
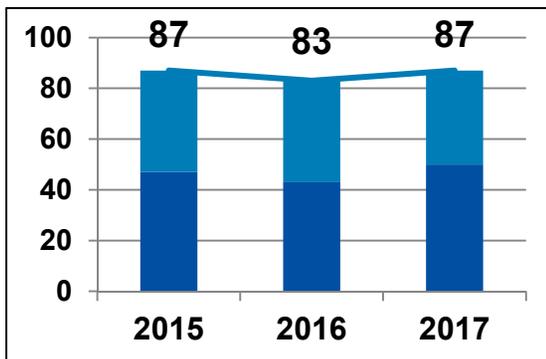
Recycling program
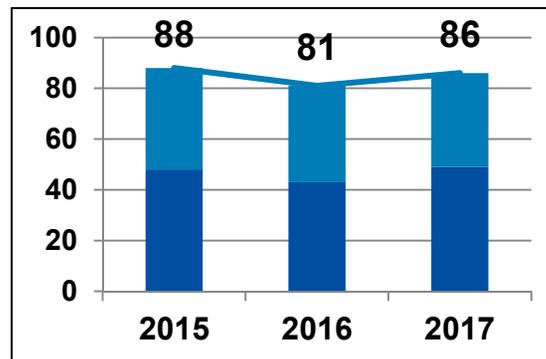
Quality of the drinking water
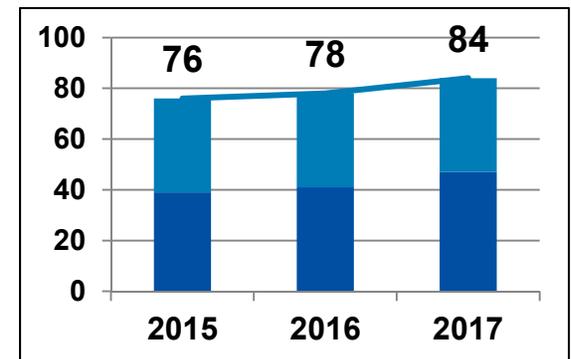
Protection from sewer backup
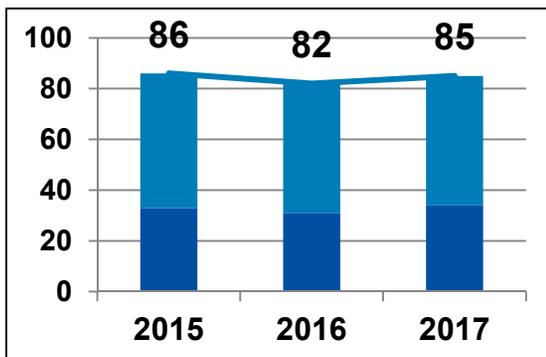

Protection from river flooding

- somewhat satisfied
- very satisfied

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
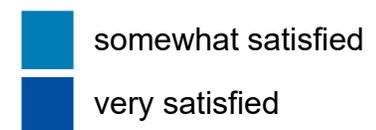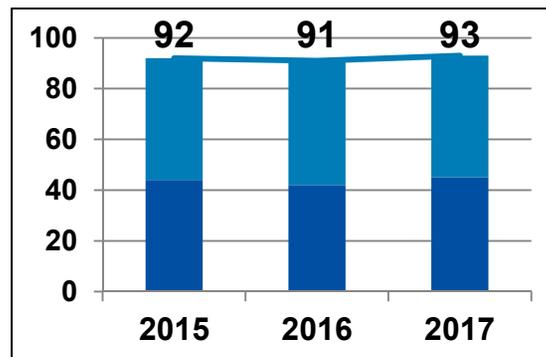
Transit / SOAs

Public transit*
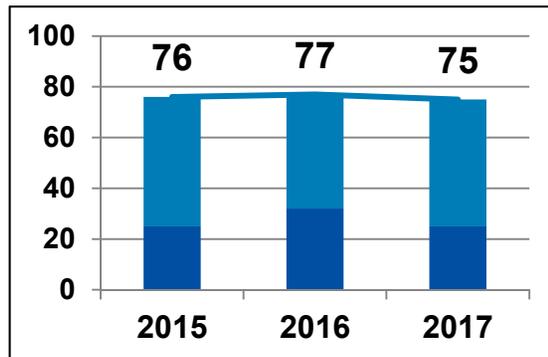
Animal services
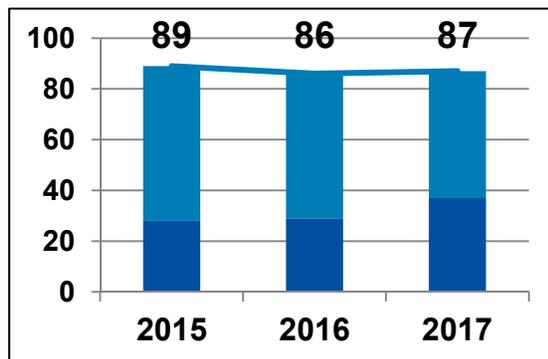
Availability & convenience of on-street parking

■ somewhat satisfied

■ very satisfied
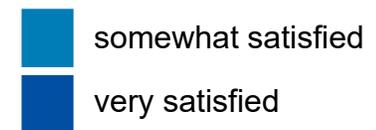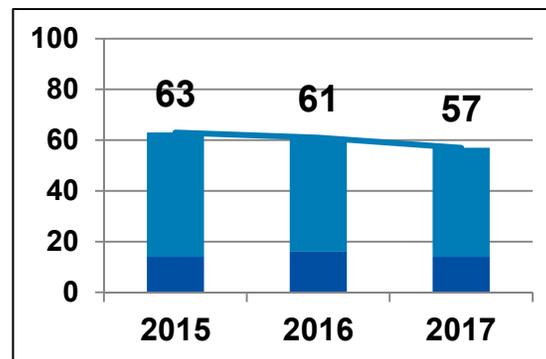
Those who indicated they have used the service.

USE OF CITY SERVICES

Have you used…?

Citizens were asked "Have you visited / attended / used _____ in the past year?"

City recreation facilities

- 2015: 60%
- 2016: 57%
- 2017: 58%
- Yes
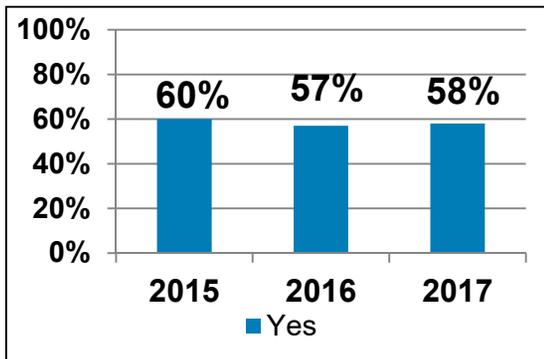
Community Centre facilities

- 2015: 57%
- 2016: 53%
- 2017: 51%
- Yes

City-operated recreation programs
(you or a family member)

- 2015: 41%
- 2016: 43%
- 2017: 42%
- Yes
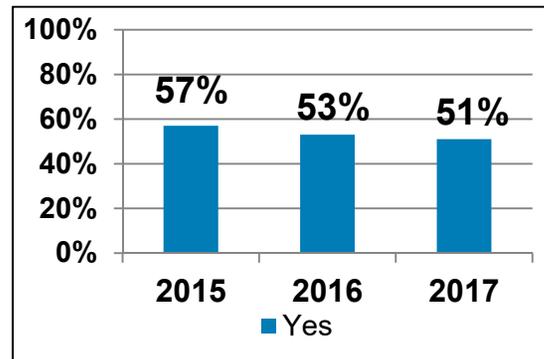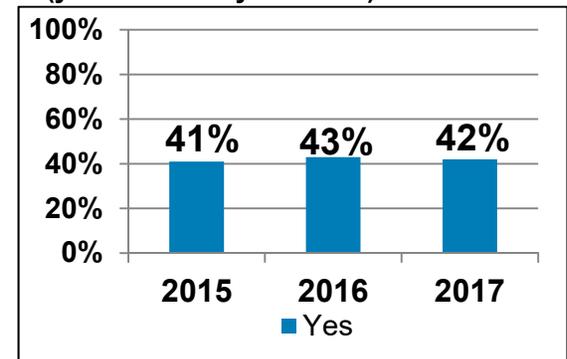
Community Centre recreation programs
(you or a family member)

- 2015: 39%
- 2016: 36%
- 2017: 31%
- Yes
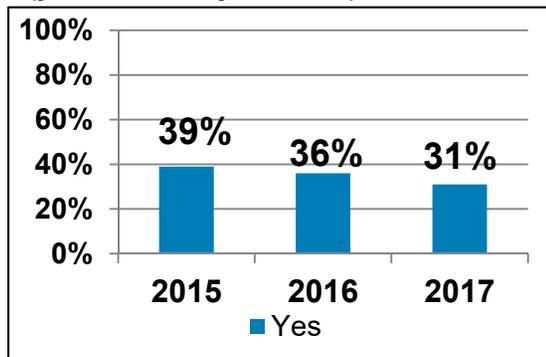
Local neighbourhood park

- 2015: 83%
- 2016: 85%
- 2017: 85%
- Yes
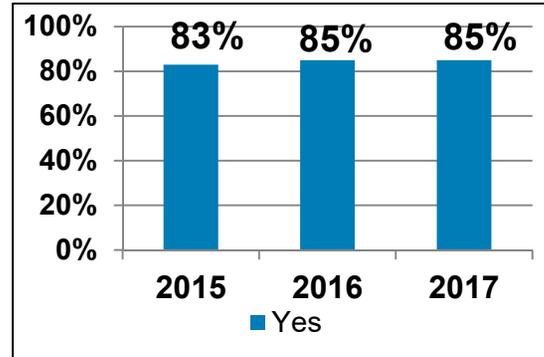
Major park such as Kildonan or St. Vital

- 2015: 80%
- 2016: 84%
- 2017: 82%
- Yes

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.
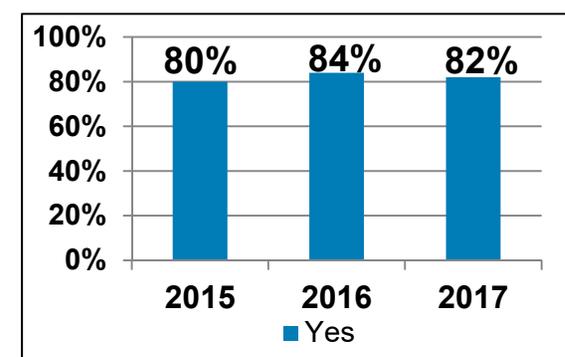
Have you used…?
(cont'd)

2015	2016	2017
86%	85%	88%

*Citizens were asked "Have you visited / attended / used _____ in the past year?"*

**City Transit** (regularly use - seasonally or at least once per week)
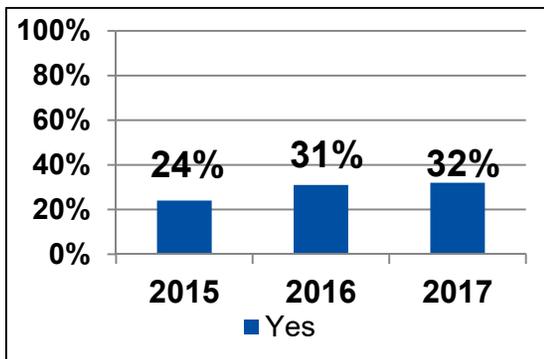
**Emergency Medical incident – paramedics** (you or a family member)
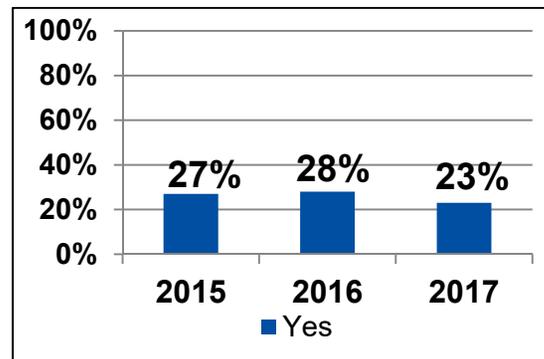
Police service response to 911 calls (used, or been involved in a 911 police incident)
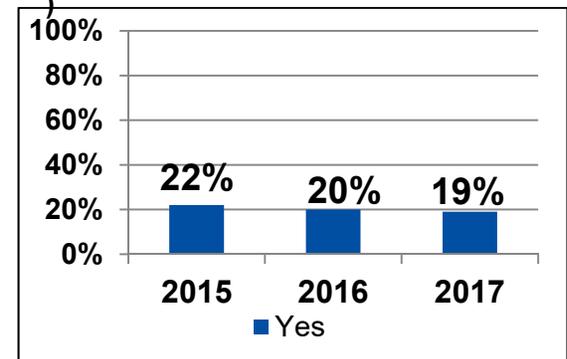
Building Permits
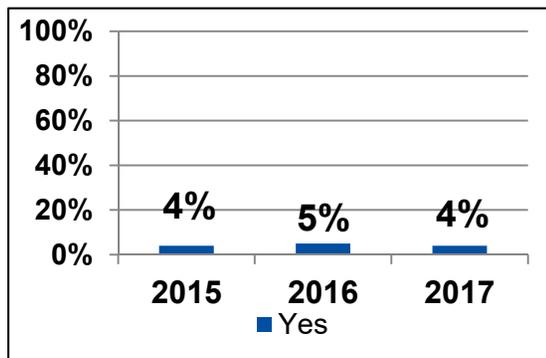
Public Libraries (you or a family member)

Source: City of Winnipeg 2017 Citizen Survey conducted by Prairie Research Associates. Margin of error +/- 4%, 19 times out of 20.