CITIZEN PERSPECTIVE
2017 Citizen Survey

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.
  – Dimark (2012)
  – Telelink (2007)
  – 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)
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.”
Who Were the Survey Respondents? (cont’d)

- 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)
Who Were the Survey Respondents? (cont’d)

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
THE RESULTS
2017 Overall Satisfaction

Quality of Life

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>90%</td>
<td>94%</td>
<td>92%</td>
</tr>
</tbody>
</table>

Value for Tax Dollars

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>62%</td>
<td>68%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Net Promoter Score (Recommendation)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>86%</td>
<td>85%</td>
<td>88%</td>
</tr>
</tbody>
</table>

Customer Service

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>72%</td>
<td>79%</td>
<td>83%</td>
</tr>
</tbody>
</table>

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)

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?”
Quality of Life Statements

It is easy to get around in Winnipeg by car

- 2015: 88
- 2016: 88
- 2017: 90

It is easy to get around in Winnipeg by transit

- 2015: 66
- 2016: 71
- 2017: 72

It is easy to get around in Winnipeg by bicycle

- 2015: 47
- 2016: 54
- 2017: 63

It is easy to get around in Winnipeg by walking

- 2015: 77
- 2016: 76
- 2017: 81

I feel safe walking alone at night in my neighborhood

- 2015: 74
- 2016: 72
- 2017: 74

I feel safe walking alone at night in the downtown

- 2015: 23
- 2016: 25
- 2017: 25

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

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%)**
- Roads / Infrastructure
- Crime / Policing
- Transit

**Quality of Life is Poor / Very Poor (8%)**
- Crime / Policing
- Roads / Infrastructure
- Poverty

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.

Citizens were asked “Why do you feel you receive ________ value from your property tax dollars?”

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

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

SATISFACTION WITH CUSTOMER SERVICE
Satisfaction with Customer Service

• 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.

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.
Citizens were asked “Thinking about your personal dealings with the City of Winnipeg and your general impressions…”

The quality of service from the City is consistently high

- Somewhat agree
- Strongly agree

The City responds quickly to requests and concerns

City staff are easy to get a hold of when I need them

Citizens were asked “How could the City’s customer service be improved?”

When these suggested reasons were compared to respondents’ level of satisfaction with customer experience, the following improvements were noted:

**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.

Importance of Service Areas

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

<table>
<thead>
<tr>
<th>Service Area</th>
<th>Importance (weighted)</th>
<th>% Ranked 1 and 2</th>
<th>As compared to 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Safety (Fire Paramedic, Police)</td>
<td>1.7</td>
<td>82%</td>
<td>↑</td>
</tr>
<tr>
<td>Infrastructure (Roads, Water)</td>
<td>2.1</td>
<td>68%</td>
<td>↑</td>
</tr>
<tr>
<td>Community Services (Libraries, Recreation)</td>
<td>2.8</td>
<td>35%</td>
<td>↓</td>
</tr>
<tr>
<td>Property &amp; Development (Land use planning)</td>
<td>3.3</td>
<td>17%</td>
<td>⇔</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snow Removal</td>
<td>71</td>
<td>73</td>
<td>73</td>
</tr>
<tr>
<td>Condition of major streets</td>
<td>43</td>
<td>45</td>
<td>48</td>
</tr>
<tr>
<td>Condition of residential streets</td>
<td>53</td>
<td>44</td>
<td>49</td>
</tr>
<tr>
<td>Management of rush hour traffic flow</td>
<td>47</td>
<td>47</td>
<td>51</td>
</tr>
<tr>
<td>City’s efforts in keeping the city clean &amp; beautiful</td>
<td>71</td>
<td>71</td>
<td>69</td>
</tr>
</tbody>
</table>

Public Works (cont’d)

Condition of local parks

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>92</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>88</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>87</td>
<td></td>
</tr>
</tbody>
</table>

Condition of major parks*

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>93</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>96</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>97</td>
<td></td>
</tr>
</tbody>
</table>

Insect Control

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>78</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>82</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>80</td>
<td></td>
</tr>
</tbody>
</table>

Overall City Services

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>86%</td>
<td>85%</td>
<td>88%</td>
</tr>
</tbody>
</table>

* Those who indicated they have used the service.

Police Service

**Enforcement of traffic laws**

- 2015: 58%
- 2016: 64%
- 2017: 64%

**Efforts in crime control**

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

**Police response to 911 calls***

- 2015: 82%
- 2016: 78%
- 2017: 74%

*Those who indicated they have used the service.*

Community Services

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>70</td>
<td>30</td>
</tr>
<tr>
<td>2016</td>
<td>73</td>
<td>27</td>
</tr>
<tr>
<td>2017</td>
<td>72</td>
<td>28</td>
</tr>
</tbody>
</table>

City support for arts, entertainment, & culture

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>83</td>
<td>17</td>
</tr>
<tr>
<td>2016</td>
<td>88</td>
<td>12</td>
</tr>
<tr>
<td>2017</td>
<td>89</td>
<td>11</td>
</tr>
</tbody>
</table>

Public Libraries*

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>97</td>
<td>3</td>
</tr>
<tr>
<td>2016</td>
<td>95</td>
<td>5</td>
</tr>
<tr>
<td>2017</td>
<td>95</td>
<td>5</td>
</tr>
</tbody>
</table>

City-operated recreation programs*

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>95</td>
<td>5</td>
</tr>
<tr>
<td>2016</td>
<td>90</td>
<td>10</td>
</tr>
<tr>
<td>2017</td>
<td>90</td>
<td>10</td>
</tr>
</tbody>
</table>

Condition of City-operated recreation facilities*

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>82</td>
<td>18</td>
</tr>
<tr>
<td>2016</td>
<td>82</td>
<td>18</td>
</tr>
<tr>
<td>2017</td>
<td>86</td>
<td>14</td>
</tr>
</tbody>
</table>

*Those who indicated they have used the service.

Fire Paramedic Service

Fire & rescue response to fire emergencies

Safety of existing buildings through fire inspections & enforcement

Fire & injury prevention education

Level of City preparedness to respond, assist

Emergency response capability for medical emergencies*

* Those who indicated they have used the service.

Planning, Property & Development

City funding for improving inner city housing

Downtown renewal

Community planning (to guide growth & change)

City’s effort in promoting economic development

City’s efforts in preserving heritage buildings

Zoning regulations & building permits to regulate building & property development

Water and Waste

Overall City Services

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>86%</td>
<td>85%</td>
<td>88%</td>
</tr>
</tbody>
</table>

Garbage collection

Quality of the drinking water

Recycling program

Protection from sewer backup

Protection from river flooding

Transit / SOAs

Public transit*

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>76</td>
<td>0</td>
</tr>
<tr>
<td>2016</td>
<td>77</td>
<td>0</td>
</tr>
<tr>
<td>2017</td>
<td>75</td>
<td>0</td>
</tr>
</tbody>
</table>

Animal services

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>89</td>
<td>0</td>
</tr>
<tr>
<td>2016</td>
<td>86</td>
<td>0</td>
</tr>
<tr>
<td>2017</td>
<td>87</td>
<td>0</td>
</tr>
</tbody>
</table>

Availability & convenience of on-street parking

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>63</td>
<td>0</td>
</tr>
<tr>
<td>2016</td>
<td>61</td>
<td>0</td>
</tr>
<tr>
<td>2017</td>
<td>57</td>
<td>0</td>
</tr>
</tbody>
</table>

* Those who indicated they have used the service.

USE OF CITY SERVICES
Citizens were asked “Have you visited / attended / used __________ in the past year?”

### City recreation facilities
- 2015: 60%
- 2016: 57%
- 2017: 58%

### Community Centre facilities
- 2015: 57%
- 2016: 53%
- 2017: 51%

### City-operated recreation programs (you or a family member)
- 2015: 41%
- 2016: 43%
- 2017: 42%

### Community Centre recreation programs (you or a family member)
- 2015: 39%
- 2016: 36%
- 2017: 31%

### Local neighbourhood park
- 2015: 83%
- 2016: 85%
- 2017: 85%

### Major park such as Kildonan or St. Vital
- 2015: 80%
- 2016: 84%
- 2017: 82%

Have you used...? (cont’d)

Citizens were asked “Have you visited / attended / used ___________ in the past year?”

City Transit (regularly use - seasonally or at least once per week)

- 2015: 24%
- 2016: 31%
- 2017: 32%

Emergency Medical incident — paramedics (you or a family member)

- 2015: 27%
- 2016: 28%
- 2017: 23%

Police service response to 911 calls (used, or been involved in a 911 police incident)

- 2015: 22%
- 2016: 20%
- 2017: 19%

Building Permits

- 2015: 0%
- 2016: 20%
- 2017: 4%

Public Libraries (you or a family member)

- 2015: 75%
- 2016: 68%
- 2017: 71%
