



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.
 - 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 $\pm 4.0\%$, 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.”*



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



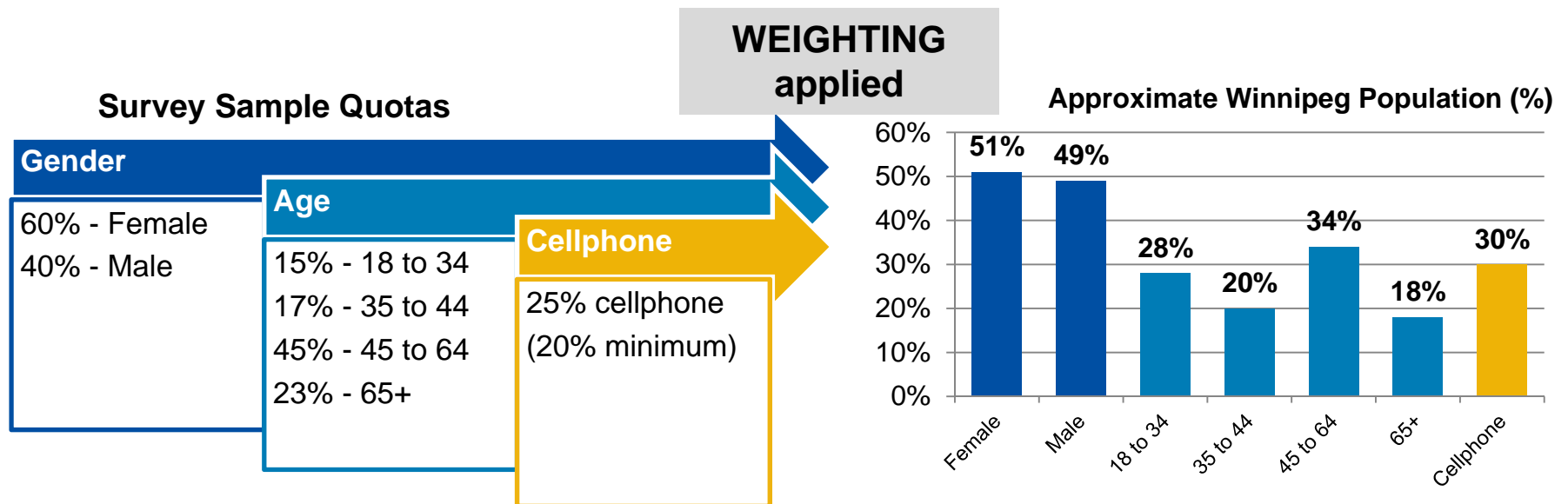
– Postal code (to identify area of city)

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

2015	2016	2017
90%	94%	92%

Value for Tax Dollars

2014	2015	2016
62%	68%	70%

Net Promoter Score (Recommendation)

9

Overall City Services

2015	2016	2017
86%	85%	88%

Customer Service

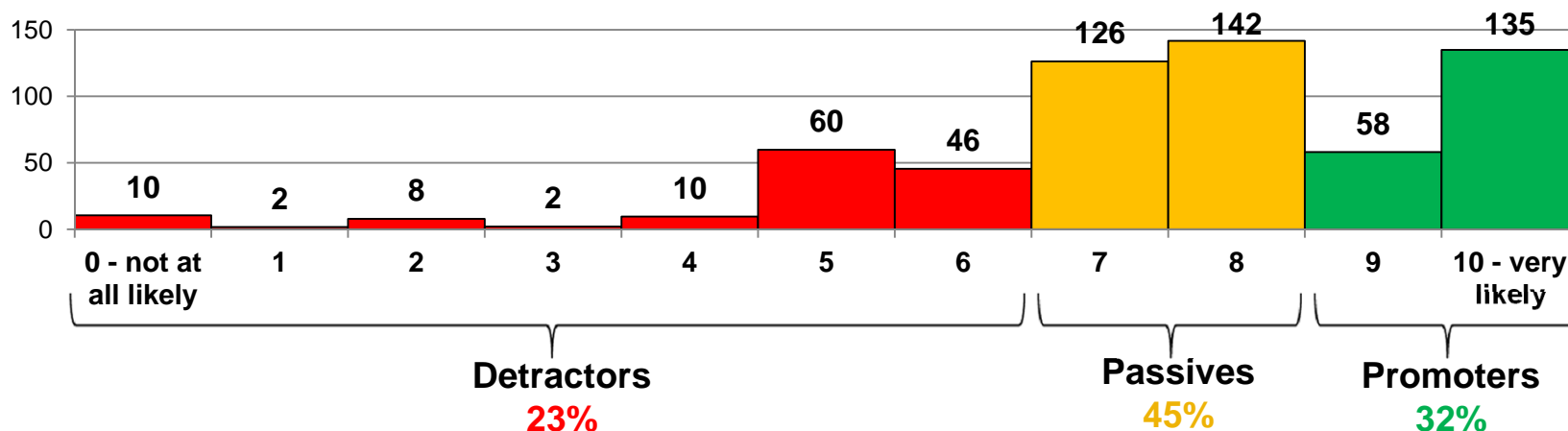
2014	2015	2016
72%	79%	83%

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





QUALITY OF LIFE

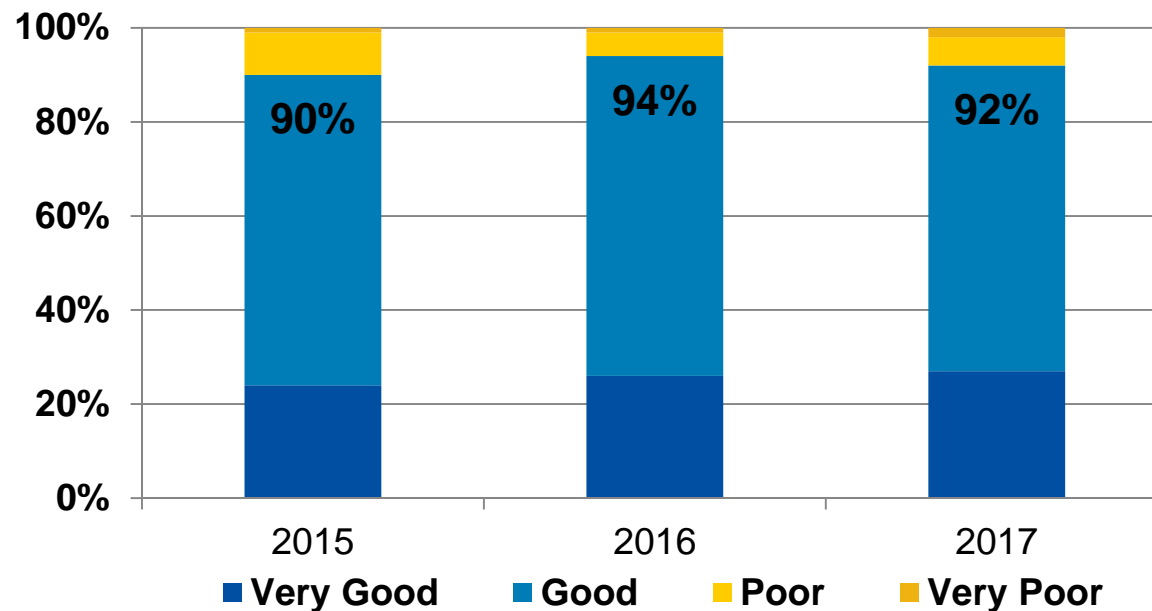
Quality of Life

Quality of Life

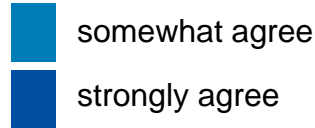
2015	2016	2017
90%	94%	92%

- 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?”

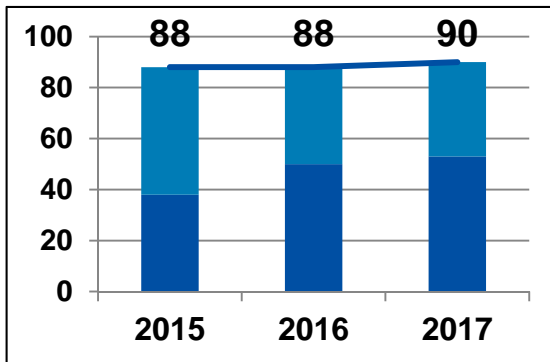


Quality of Life Statements

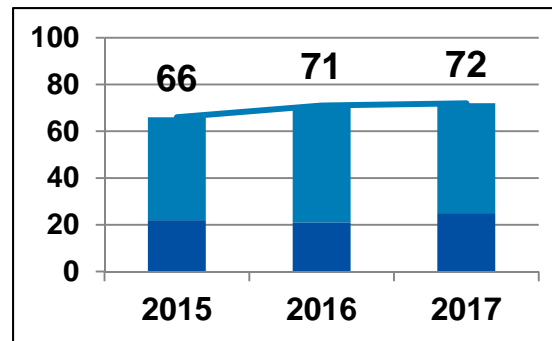


Quality of Life		
2015	2016	2017
90%	94%	92%

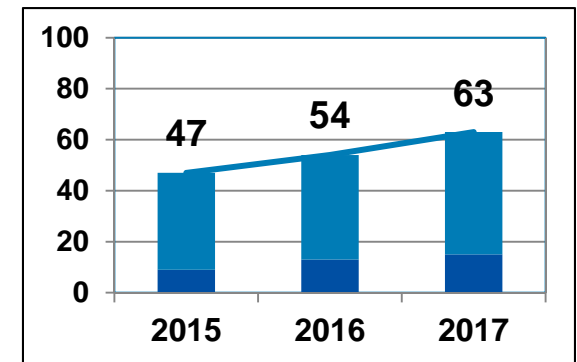
It is easy to get around in Winnipeg by car



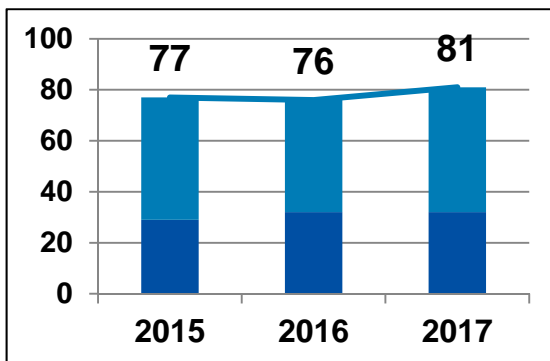
It is easy to get around in Winnipeg by transit



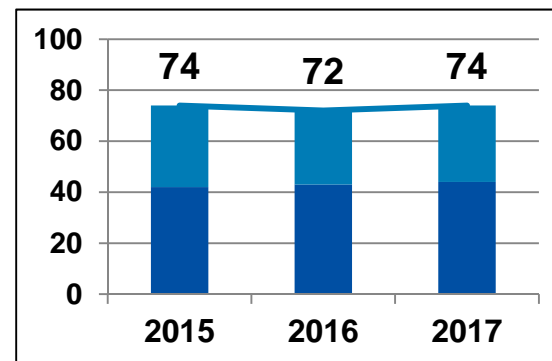
It is easy to get around in Winnipeg by bicycle



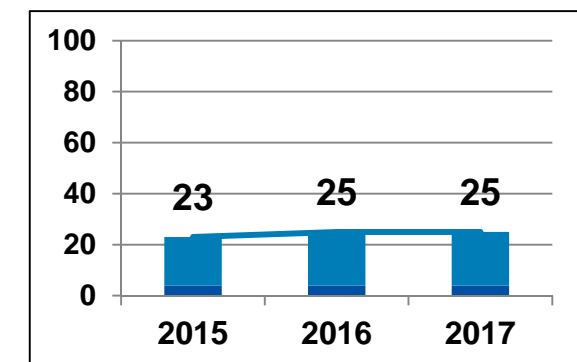
It is easy to get around in Winnipeg by walking



I feel safe walking alone at night in my neighborhood



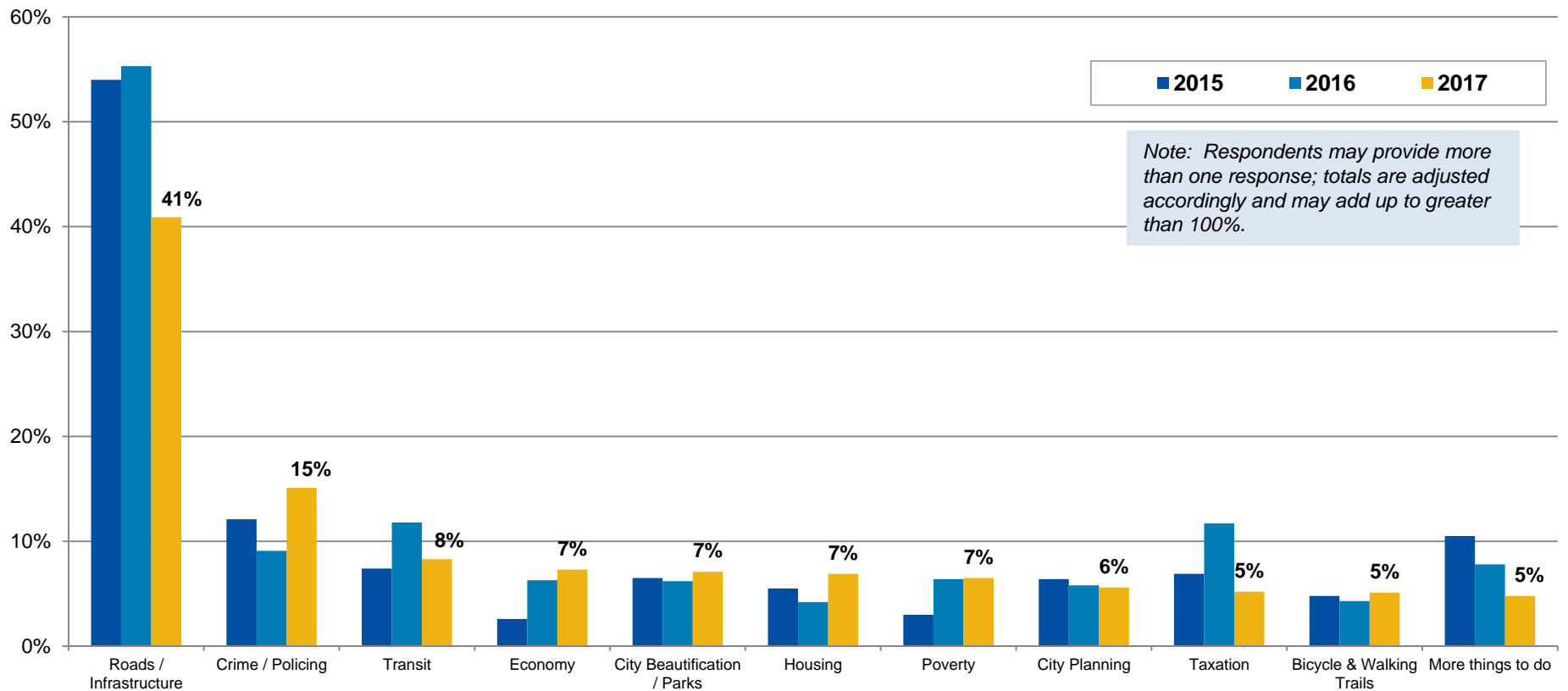
I feel safe walking alone at night in the downtown



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?”



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%)

- Roads / Infrastructure
- Crime / Policing
- Transit

Quality of Life is Poor / Very Poor (8%)

- Crime / Policing
- Roads / Infrastructure
- Poverty



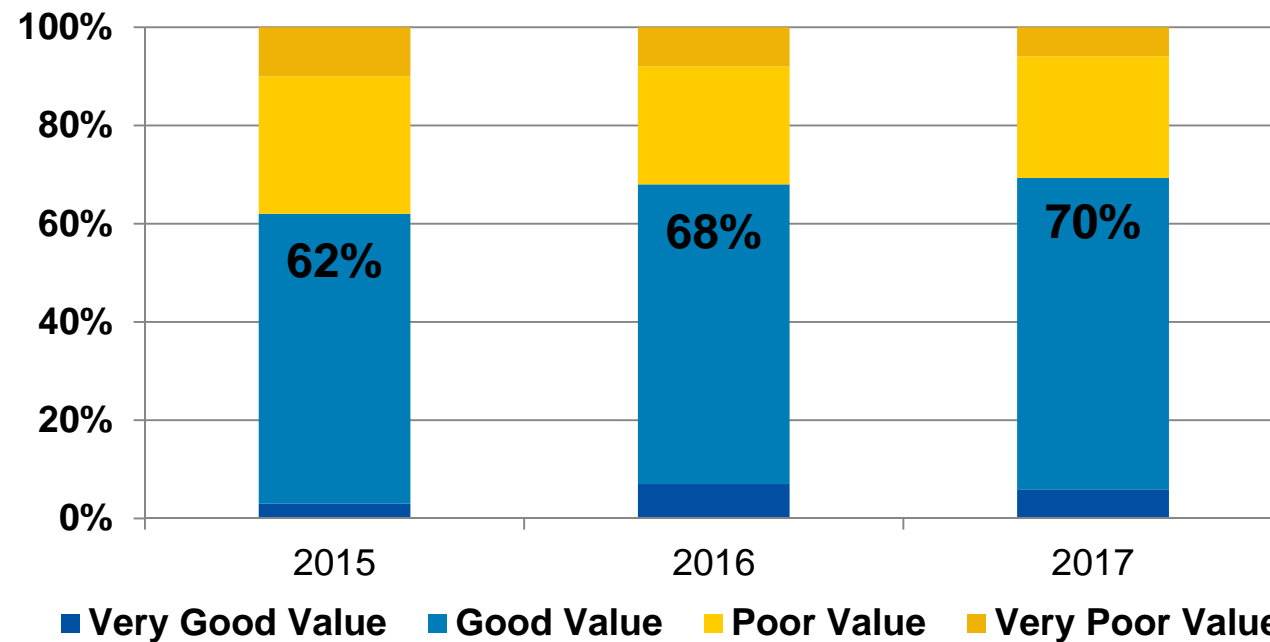
VALUE FOR TAX DOLLARS

Value for Tax Dollars

Value for Tax Dollars

2014	2015	2016
62%	68%	70%

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.

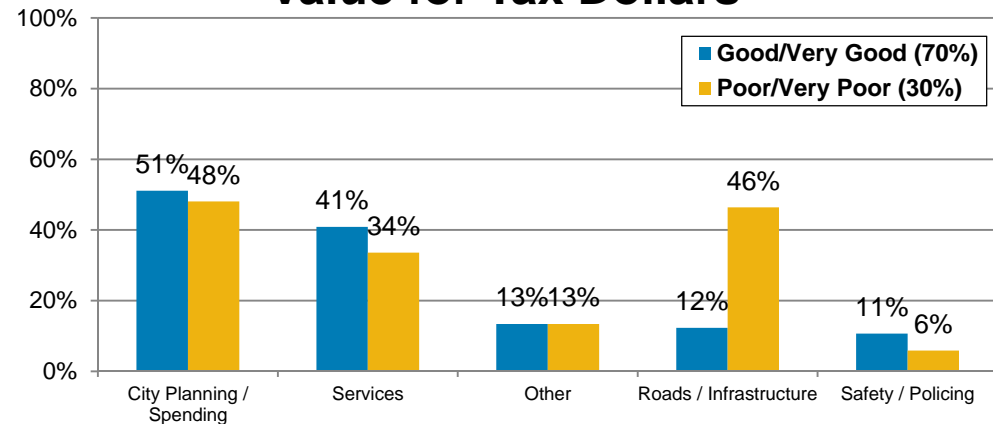
Reason for 'Value Received for Tax Dollars'



**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



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

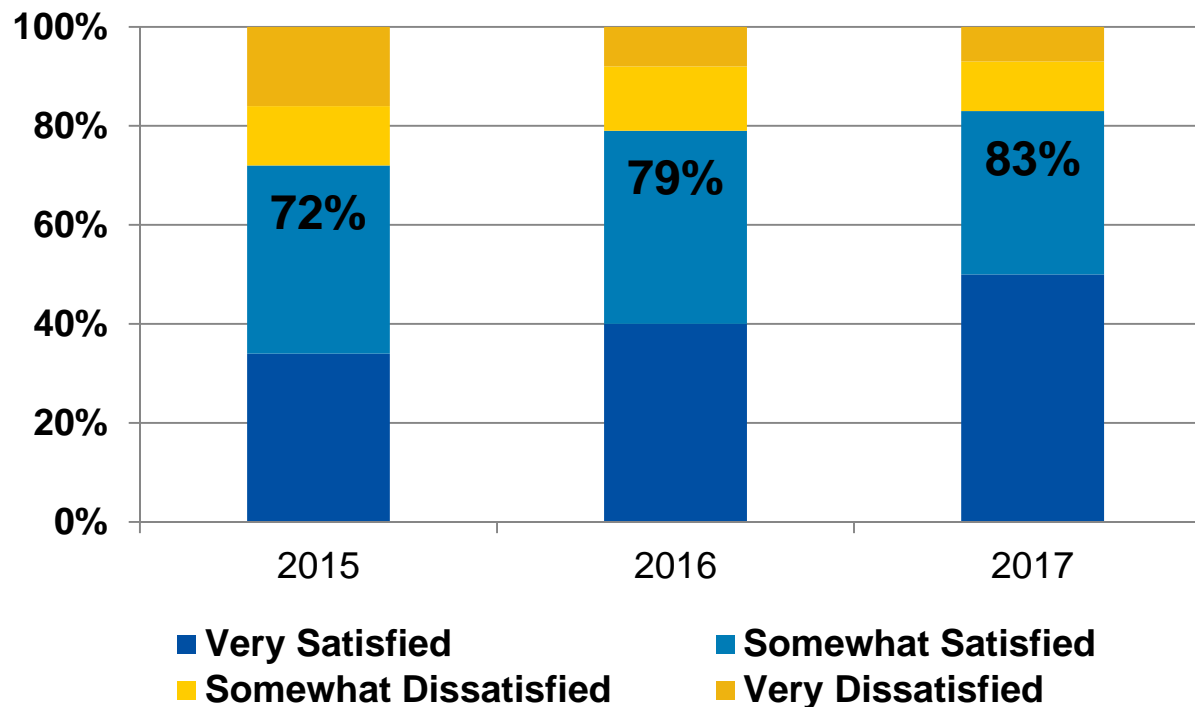


SATISFACTION WITH CUSTOMER SERVICE

Satisfaction with Customer Service

Customer Service		
2014	2015	2016
72%	79%	83%

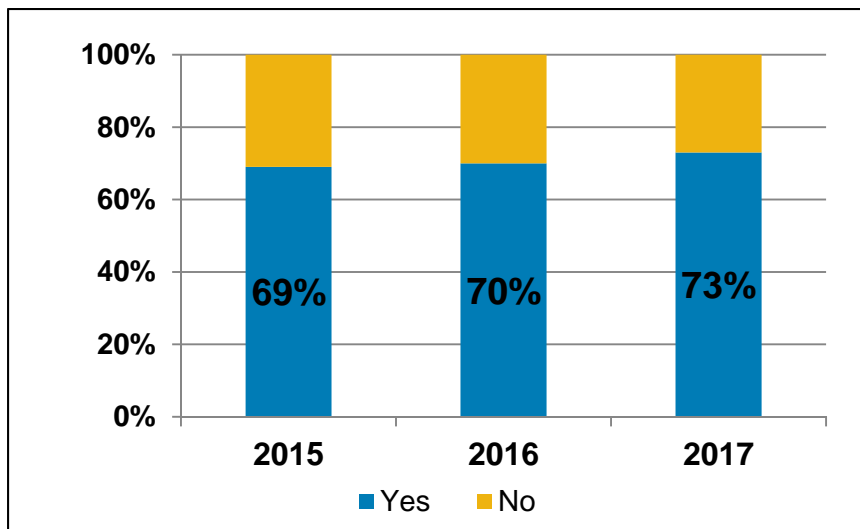
- In 2017, 83% of Winnipeggers who contacted the City in the last year were satisfied or very satisfied with the experience.
- This is the highest level over the last three years.



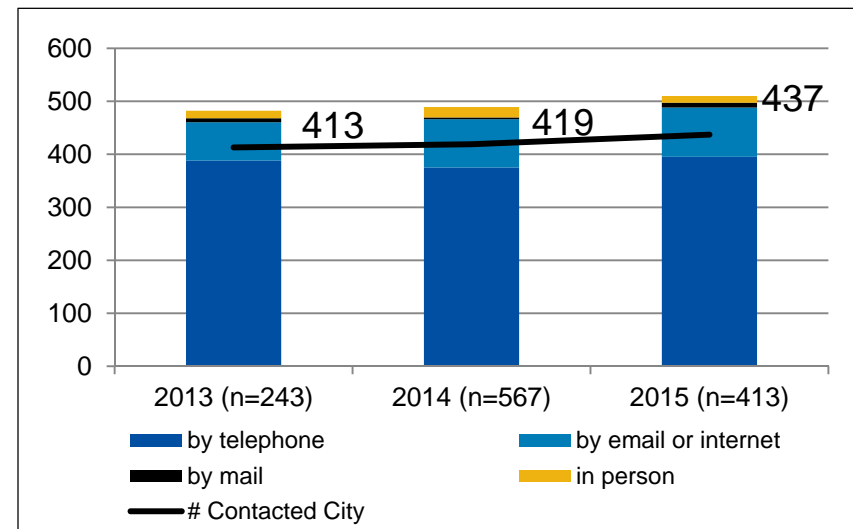
Contact with the City

Customer Service		
2014	2015	2016
72%	79%	83%

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%.

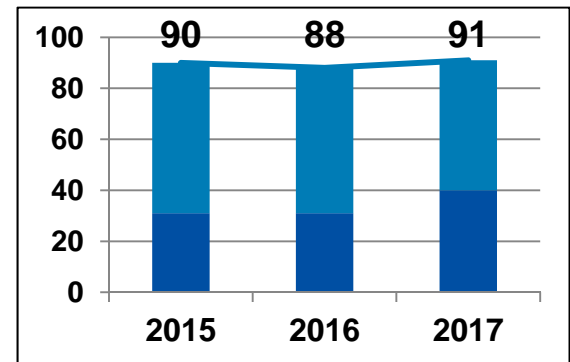
- 73% of the respondents indicated they have contacted the City in the past year.
- Contact by email/internet is increasing, while contacts by telephone remain fairly consistent.

Customer Service Details

Customer Service		
2014	2015	2016
72%	79%	83%

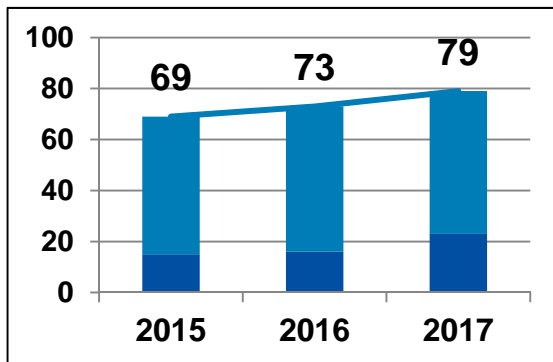
Citizens were asked “Thinking about your personal dealings with the City of Winnipeg and your general impressions...”

City staff are courteous, helpful and knowledgeable

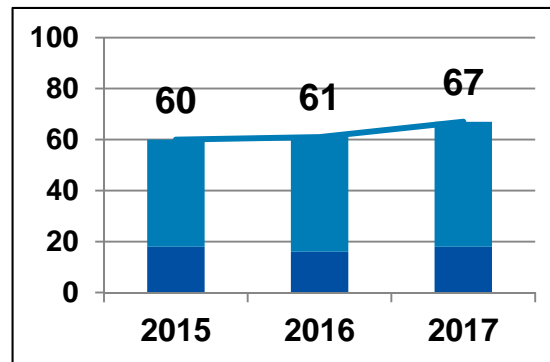


■ somewhat agree
■ strongly agree

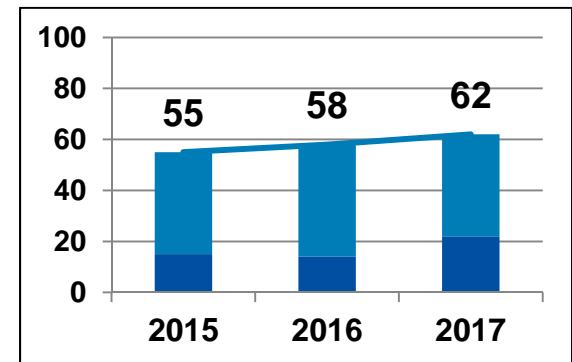
The quality of service from the City is consistently high



The City responds quickly to requests and concerns



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



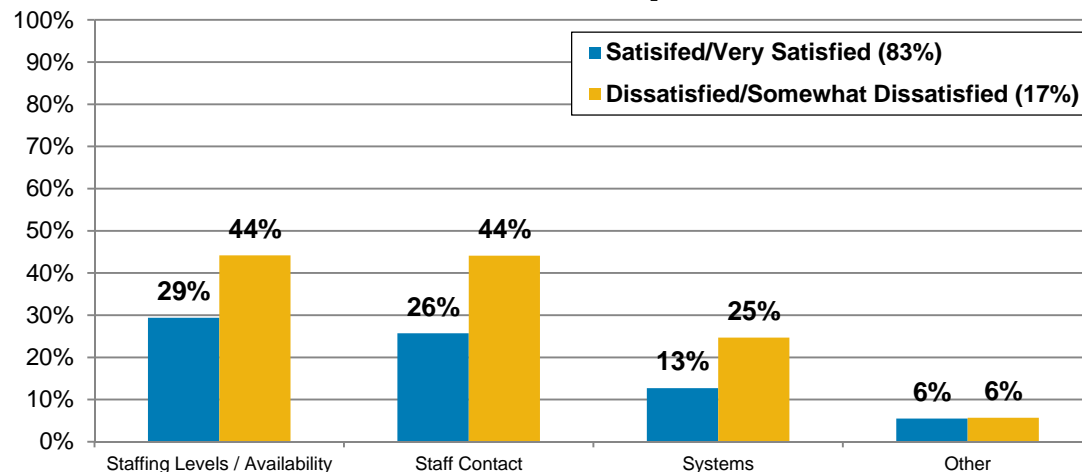
Improvement to Customer Service



**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



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



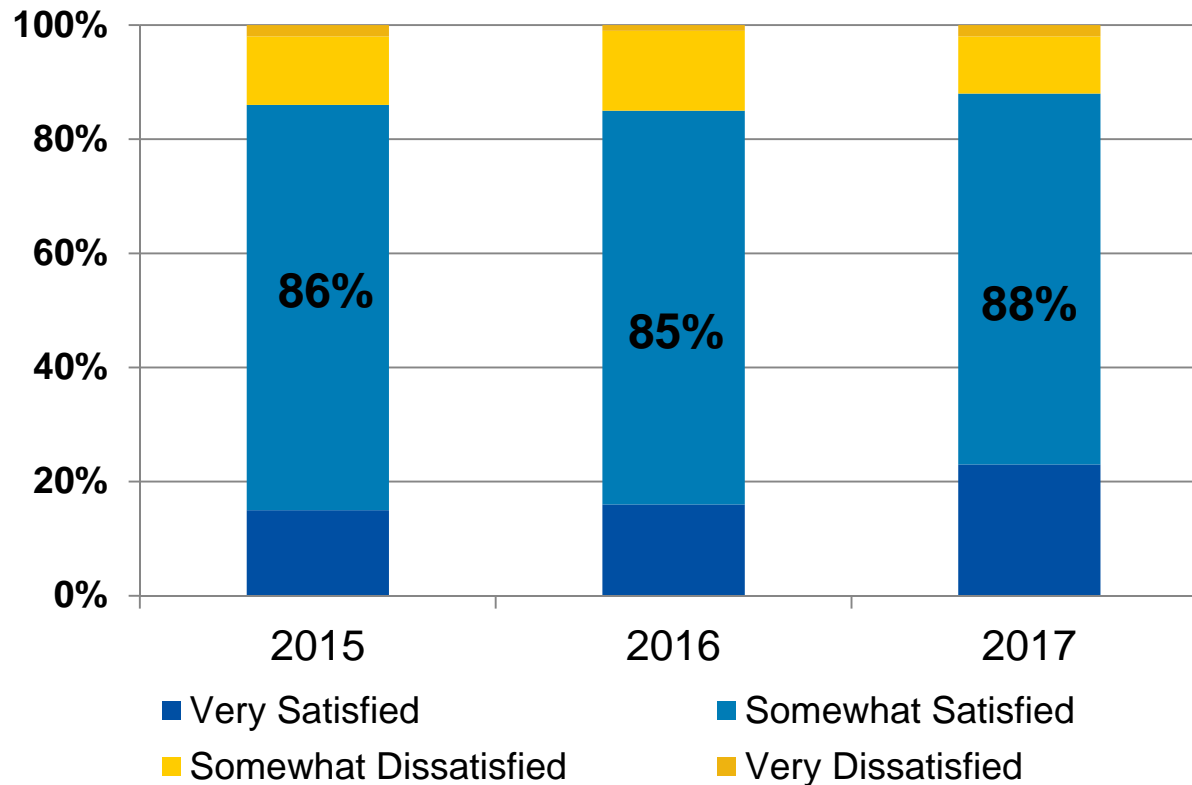
SATISFACTION WITH CITY SERVICES

Overall Satisfaction with City Services

Overall City Services

2015	2016	2017
86%	85%	88%

- 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”

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:

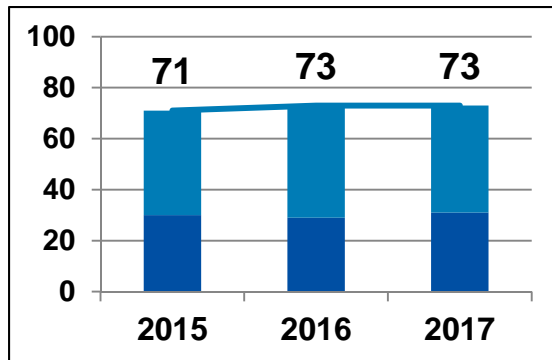
“Now, I’m going to read you a list of services that are provided by the City of Winnipeg. Please tell me whether you are very dissatisfied, somewhat dissatisfied, somewhat satisfied or very satisfied with each of the following services.”

Public Works

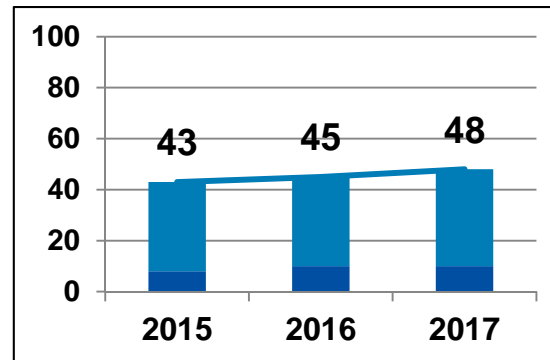
Overall City Services

2015	2016	2017
86%	85%	88%

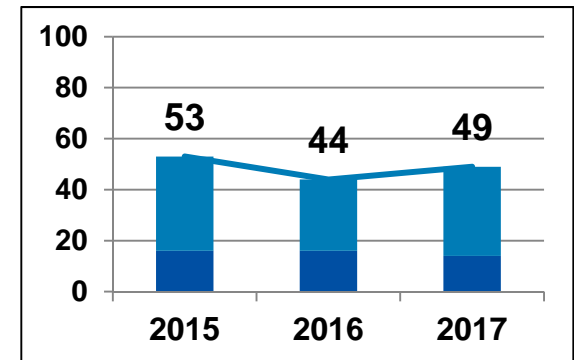
Snow Removal



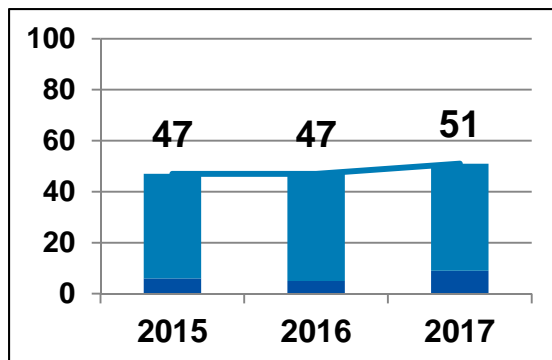
Condition of major streets



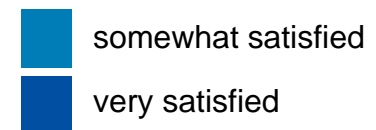
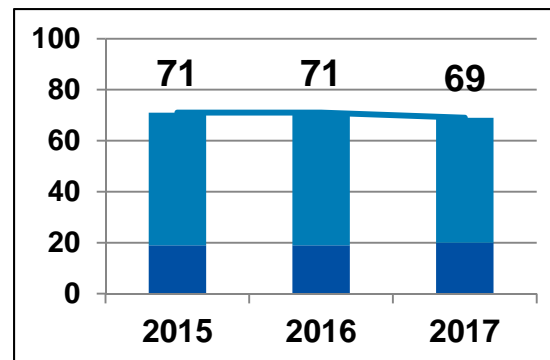
Condition of residential streets



Management of rush hour traffic flow



City's efforts in keeping the city clean & beautiful

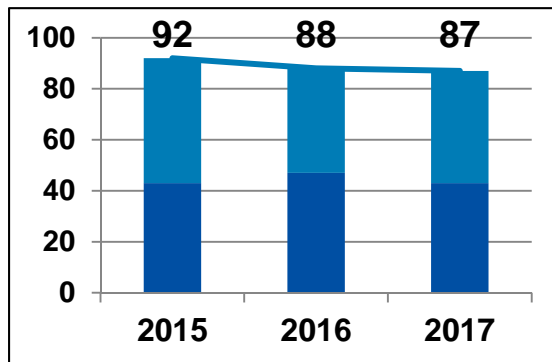


Public Works (cont'd)

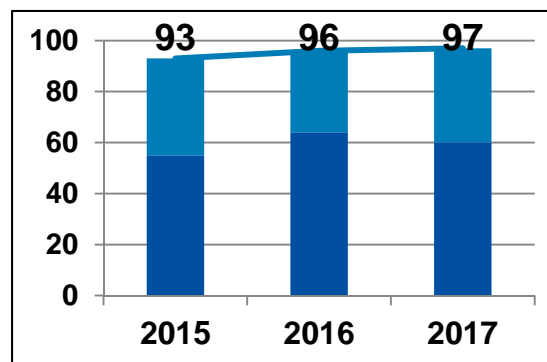
Overall City Services

2015	2016	2017
86%	85%	88%

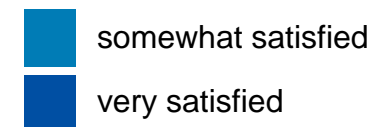
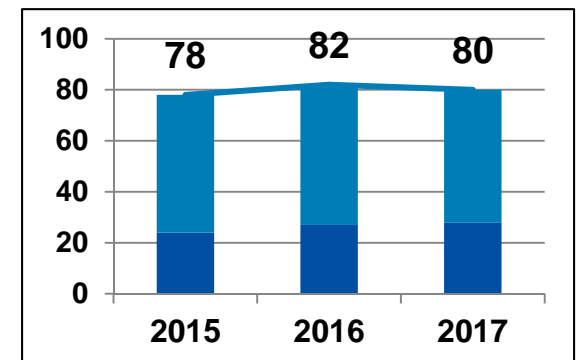
Condition of local parks



Condition of major parks*



Insect Control



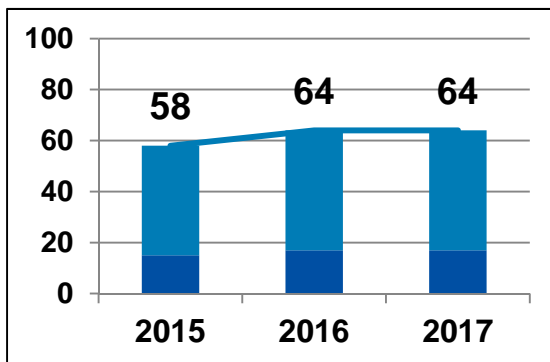
* Those who indicated they have used the service.

Police Service

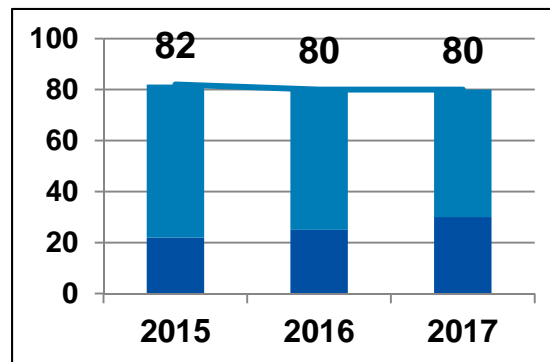
Overall City Services

2015	2016	2017
86%	85%	88%

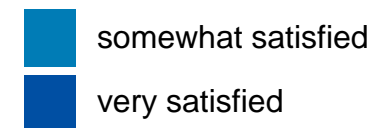
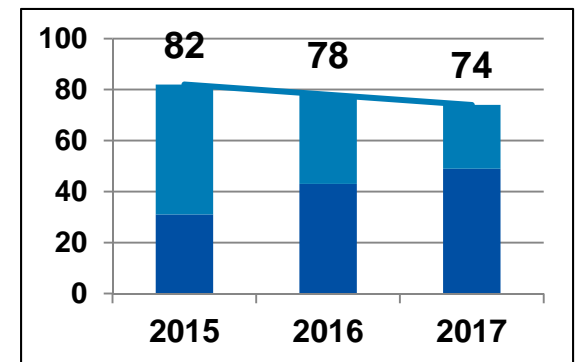
Enforcement of traffic laws



Efforts in crime control



Police response to 911 calls*



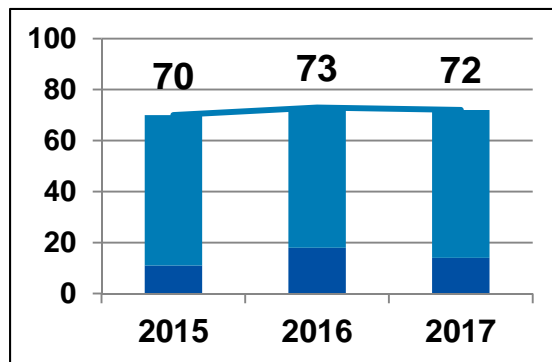
* Those who indicated they have used the service.

Community Services

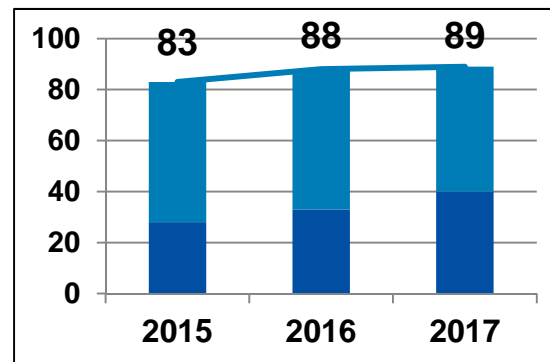
Overall City Services

2015	2016	2017
86%	85%	88%

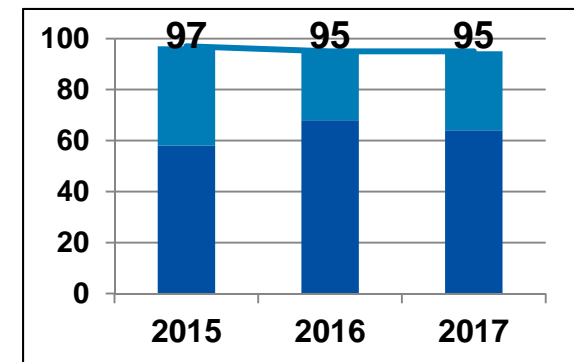
City's efforts to ensure residential property standards are met through inspections



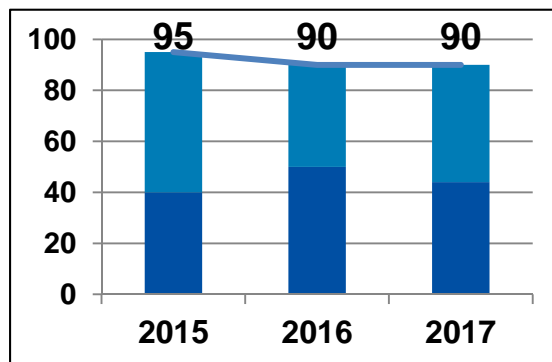
City support for arts, entertainment, & culture



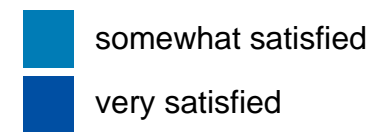
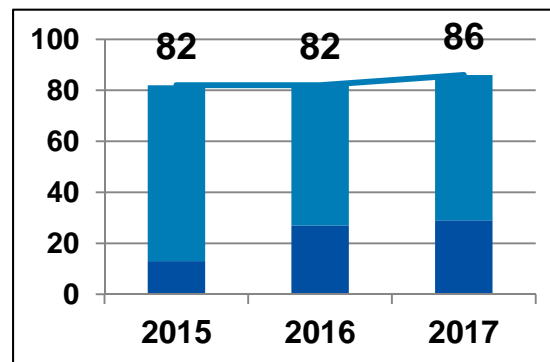
Public Libraries*



City-operated recreation programs*



Condition of City-operated recreation facilities*



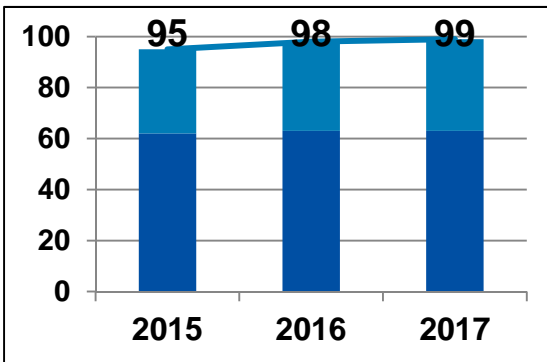
* Those who indicated they have used the service.

Fire Paramedic Service

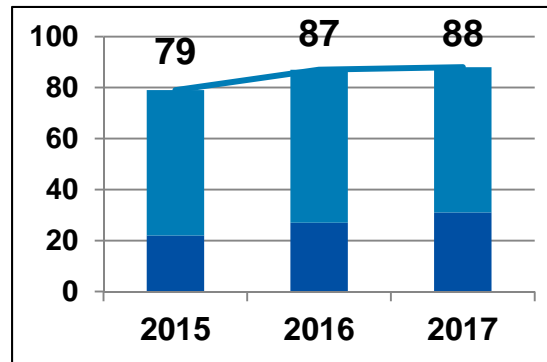
Overall City Services

2015	2016	2017
86%	85%	88%

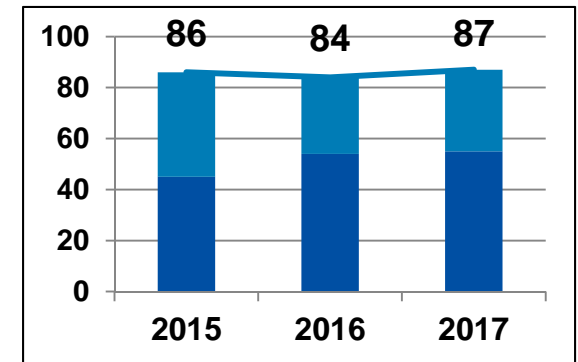
Fire & rescue response to fire emergencies



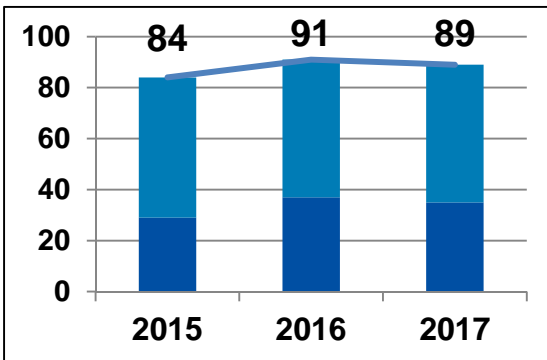
Level of City preparedness to respond, assist



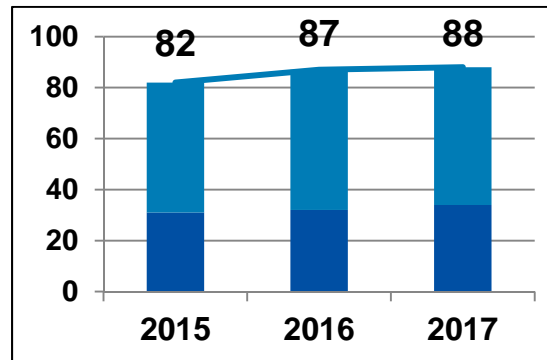
Emergency response capability for medical emergencies*



Safety of existing buildings through fire inspections & enforcement



Fire & injury prevention education



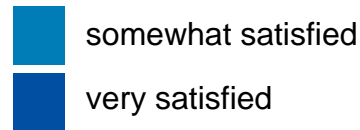
■ somewhat satisfied
■ very satisfied

** Those who indicated they have used the service.*

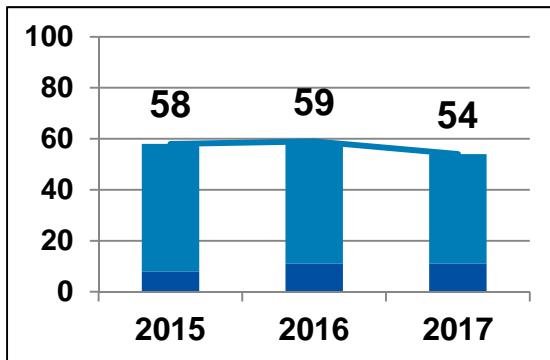
Planning, Property & Development

Overall City Services

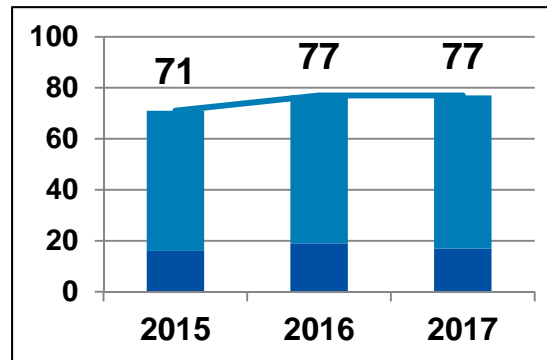
2015	2016	2017
86%	85%	88%



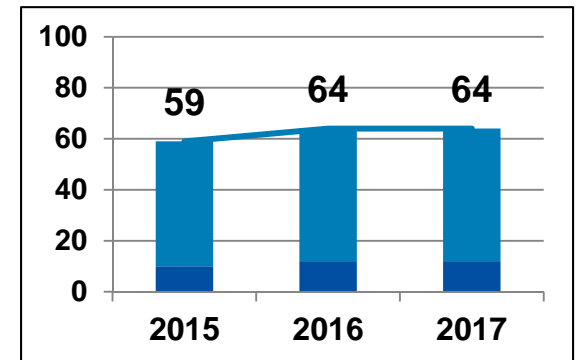
City funding for improving inner city housing



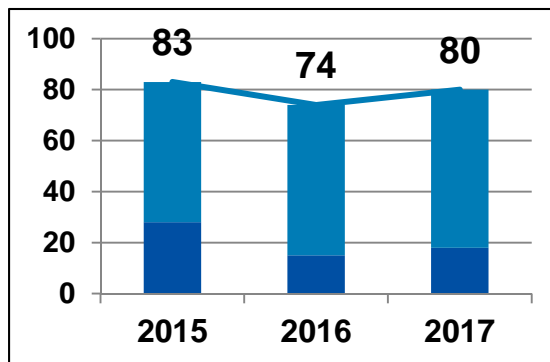
Downtown renewal



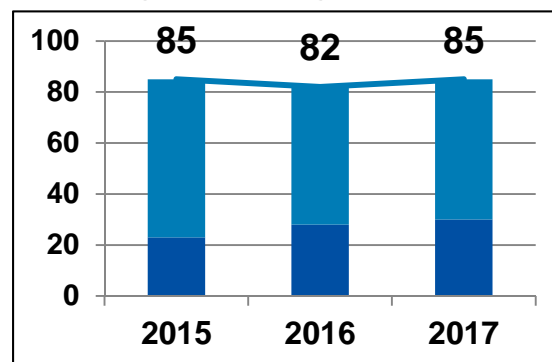
Community planning (to guide growth & change)



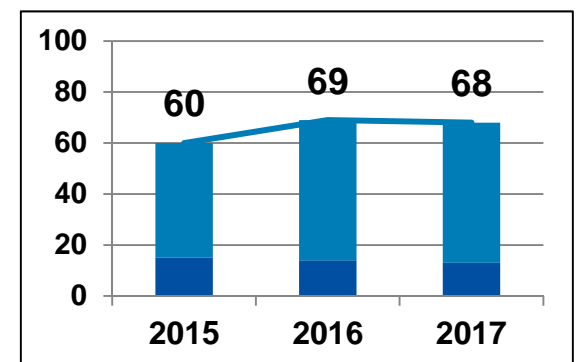
City's effort in promoting economic development



City's efforts in preserving heritage buildings



Zoning regulations & building permits to regulate building & property development

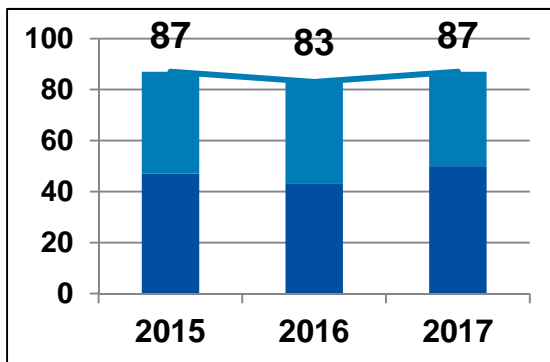


Water and Waste

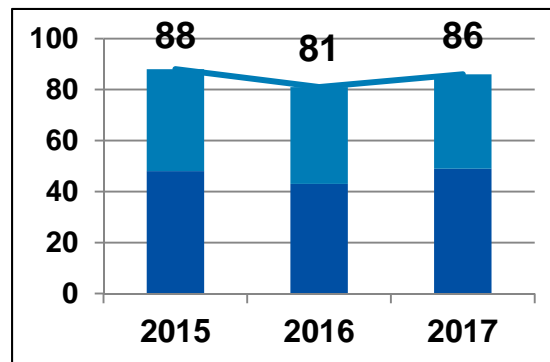
Overall City Services

2015	2016	2017
86%	85%	88%

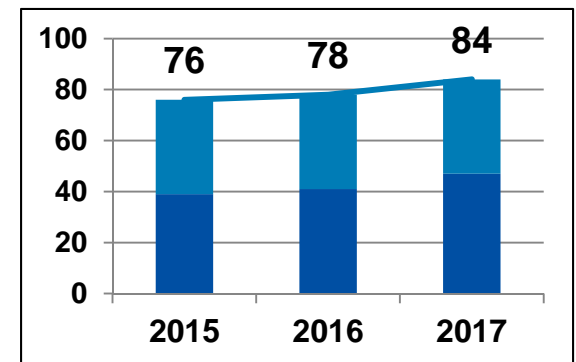
Garbage collection



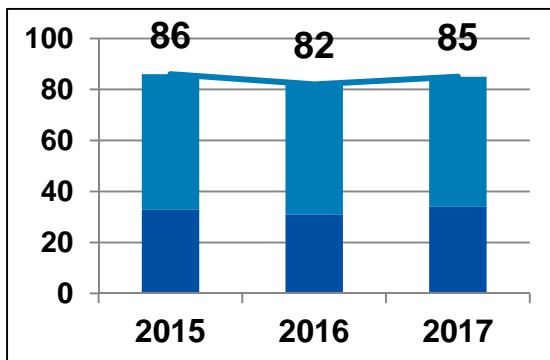
Recycling program



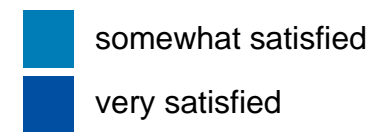
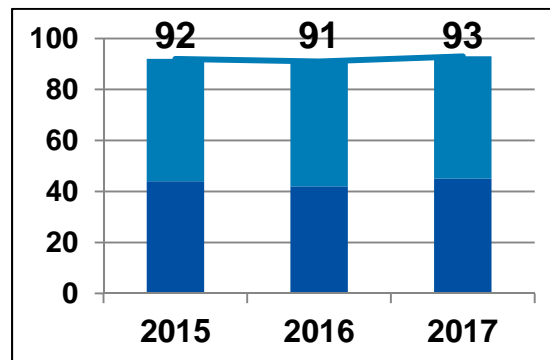
Quality of the drinking water



Protection from sewer backup



Protection from river flooding

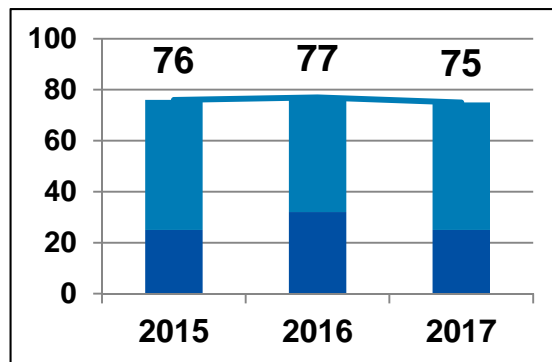


Transit / SOAs

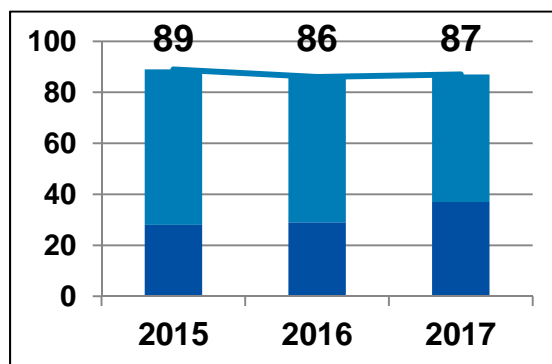
Overall City Services

2015	2016	2017
86%	85%	88%

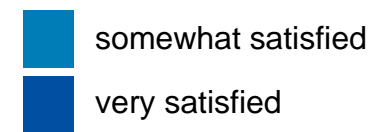
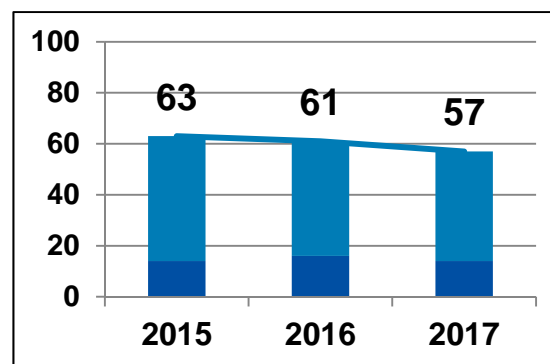
Public transit*



Animal services



Availability & convenience of on-street parking



* Those who indicated they have used the service.



USE OF CITY SERVICES

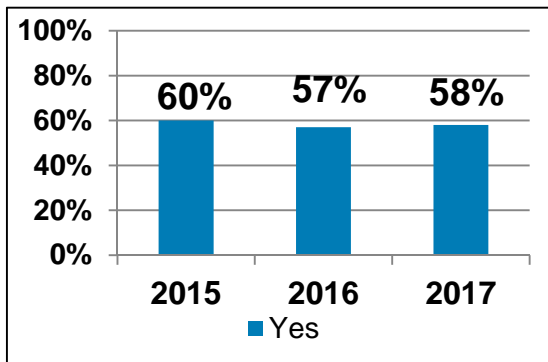
Have you used...?

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

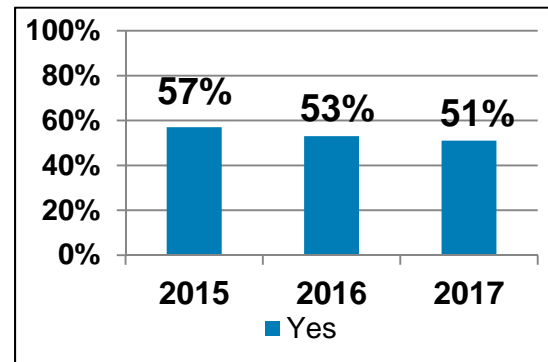
Overall City Services

2015	2016	2017
86%	85%	88%

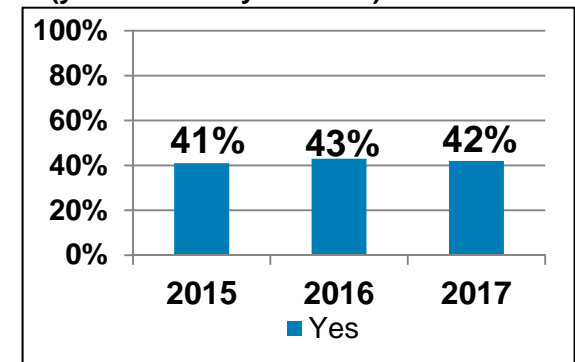
City recreation facilities



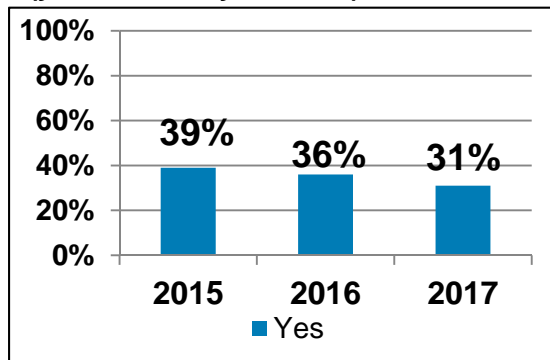
Community Centre facilities



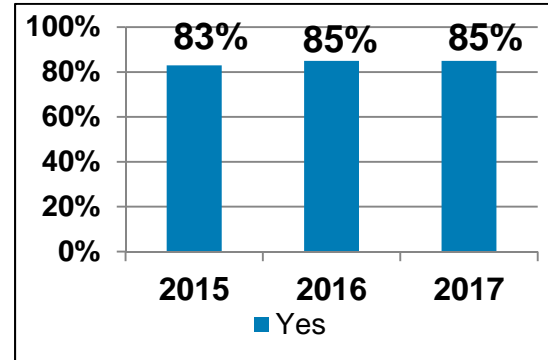
City-operated recreation programs (you or a family member)



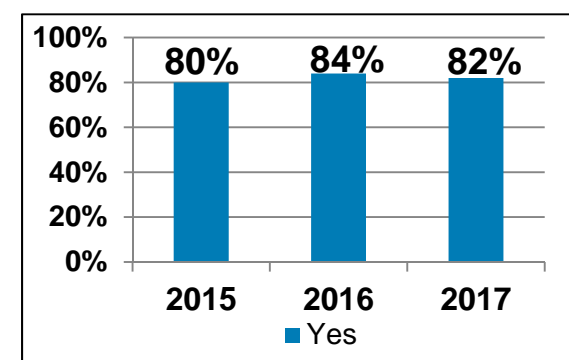
Community Centre recreation programs (you or a family member)



Local neighbourhood park



Major park such as Kildonan or St. Vital



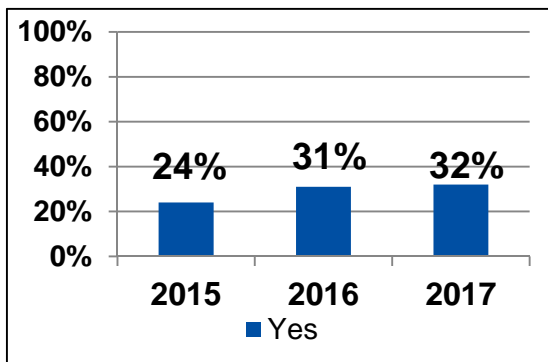
Have you used...? (cont'd)

Overall City Services

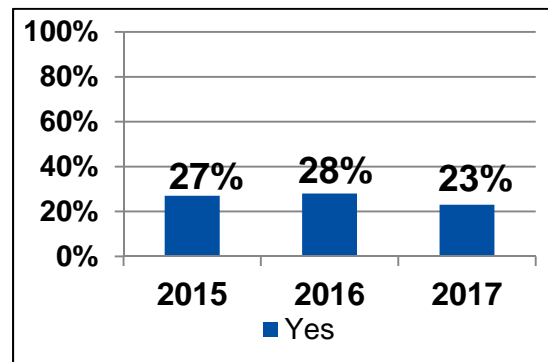
2015	2016	2017
86%	85%	88%

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

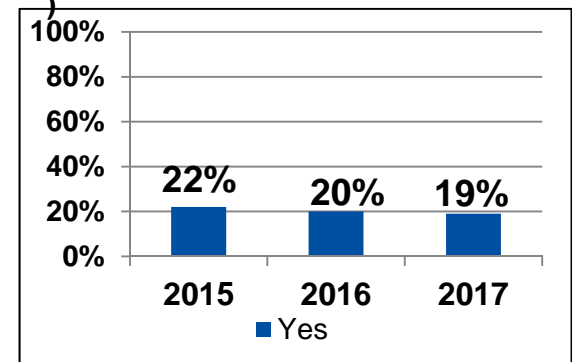
City Transit (regularly use - seasonally or at least once per week)



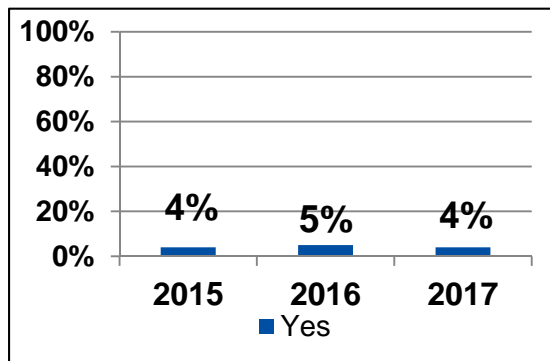
Emergency Medical incident – paramedics (you or a family member)



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



Building Permits



Public Libraries (you or a family member)

