CITIZEN PERSPECTIVE
2018 CITIZEN SURVEY

Survey conducted by Prairie Research Associates
May 1 to 17, 2018
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 2018
  – 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.”
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
2018 Overall Satisfaction

Net Promoter Score Value = 11

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)

\[ \text{NPS Value} = \text{Promoters} - \text{Detractors} \]

Since the City of Winnipeg began assessing the Net Promoter Score, there has been a steady increase in the score.

- In 2018, in Winnipeg, 33% are Promoters and 22% are Detractors, yielding an NPS of 11

QUALITY OF LIFE
In 2018, 93% 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

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>88</td>
<td>88</td>
<td>90</td>
<td>91</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>22</td>
<td>22</td>
<td>10</td>
<td>9</td>
</tr>
</tbody>
</table>

It is easy to get around in Winnipeg by transit

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>66</td>
<td>71</td>
<td>72</td>
<td>65</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>34</td>
<td>29</td>
<td>28</td>
<td>35</td>
</tr>
</tbody>
</table>

It is easy to get around in Winnipeg by bicycle

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>47</td>
<td>54</td>
<td>63</td>
<td>60</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>53</td>
<td>46</td>
<td>37</td>
<td>40</td>
</tr>
</tbody>
</table>

It is easy to get around in Winnipeg by walking

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>77</td>
<td>76</td>
<td>81</td>
<td>75</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>23</td>
<td>24</td>
<td>19</td>
<td>25</td>
</tr>
</tbody>
</table>

I feel safe walking alone at night in my neighborhood

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>74</td>
<td>72</td>
<td>74</td>
<td>78</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>26</td>
<td>28</td>
<td>26</td>
<td>22</td>
</tr>
</tbody>
</table>

I feel safe walking alone at night in the downtown

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>23</td>
<td>25</td>
<td>25</td>
<td>28</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>77</td>
<td>75</td>
<td>75</td>
<td>72</td>
</tr>
</tbody>
</table>

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 four years.

Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.
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 (93%)
- Roads / Infrastructure
- Transit / Rapid Transit
- Crime / Policing

Quality of Life is Poor / Very Poor (7%)
- Roads / Infrastructure
- Taxation

Note: 46% suggested improvements in a variety of other areas outside the City’s mandate including schools, healthcare, child daycare, etc.
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 2018, 71% of Winnipeggers believe there is good to very good value in their municipal tax dollar.
- This is the highest level over the last four 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%.

When these suggested reasons were compared to respondents’ ‘value received’ response, the following reasons were shared:

**Most common reasons for Good / Very Good (71%)**
- 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 (29%)**
- Dissatisfied with the City's planning and spending decisions
  - feel taxes/fees are too high
- Dissatisfied with overall or specific services
  - primarily snow clearing
- Dissatisfaction with condition of roads

SATISFACTION WITH CUSTOMER SERVICE
In 2018, 79% of Winnipeggers who contacted the City in the last year were satisfied or very satisfied with the experience.
70% of the respondents indicated they have contacted the City in the past year. The primary method of contact is telephone (75%). Email and internet contacts have grown in recent years, and in 2018 this response area was broken down further to better identify how Citizens are contacting the City:

- by email or internet (12%),
- through social media (2%), or
- by completing a form online (8%).

Note: Respondents may provide more than one response; totals are adjusted accordingly and may add up to greater than 100%.
Citizens were asked “Thinking about your personal dealings with the City of Winnipeg and your general impressions…”

The City responds quickly to requests and concerns

The quality of service from the City is consistently high

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

City staff are courteous, helpful and knowledgeable

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 (79%)**
- Improve staffing levels / wait time
- Improvements to staff contact

**Dissatisfied with Customer Experience (21%)**
- Improve staffing levels / wait time
- Improvements related to staff contact
  - About half within the call centre, and half in the handling of their complaint

SATISFACTION WITH CITY SERVICES
In 2018, 87% of Winnipeggers are satisfied with the overall level of services provided.
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 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Safety (Fire Paramedic, Police)</td>
<td>1.8</td>
<td>80%</td>
<td>↓</td>
</tr>
<tr>
<td>Infrastructure (Roads, Water)</td>
<td>2.2</td>
<td>62%</td>
<td>↓</td>
</tr>
<tr>
<td>Community Services (Libraries, Recreation)</td>
<td>2.6</td>
<td>43%</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>

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.”
Overall City Services

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)**

*Those who indicated they have used the service.*

**Condition of local parks**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>92</td>
<td>88</td>
<td>87</td>
<td>86</td>
</tr>
</tbody>
</table>

**Condition of major parks***

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>93</td>
<td>96</td>
<td>97</td>
<td>98</td>
</tr>
</tbody>
</table>

**Insect Control**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>78</td>
<td>82</td>
<td>80</td>
<td>86</td>
</tr>
</tbody>
</table>

*Margin of error +/- 4%, 19 times out of 20.*

**Overall City Services**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>86%</td>
<td>85%</td>
<td>88%</td>
<td>87%</td>
</tr>
</tbody>
</table>

**Source:** City of Winnipeg 2018 Citizen Survey conducted by Prairie Research Associates.
Police Service

Enforcement of traffic laws

Efforts in crime control

Police response to 911 calls*

* Those who indicated they have used the service.

Community Services

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

City support for arts, entertainment, & culture

Public Libraries*

*Those who indicated they have used the service.*

Fire Paramedic Service

Fire & rescue response to fire emergencies

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>95</td>
<td>98</td>
<td>99</td>
<td>99</td>
</tr>
</tbody>
</table>

Level of City preparedness to respond, assist

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
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<tbody>
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<td>Value</td>
<td>79</td>
<td>87</td>
<td>88</td>
<td>92</td>
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</table>

Emergency response capability for medical emergencies*

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>86</td>
<td>84</td>
<td>87</td>
<td>88</td>
</tr>
</tbody>
</table>

Safety of existing buildings through fire inspections & enforcement

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>84</td>
<td>91</td>
<td>89</td>
<td>85</td>
</tr>
</tbody>
</table>

Fire & injury prevention education

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>82</td>
<td>87</td>
<td>88</td>
<td>88</td>
</tr>
</tbody>
</table>

* Those who indicated they have used the service.  

Planning, Property & Development

City funding for improving inner city housing

City’s effort in promoting economic development

City’s efforts in preserving heritage buildings

Community planning (to guide growth & change)

Zoning regulations & building permits to regulate building & property development

Water and Waste

Overall City Services

<table>
<thead>
<tr>
<th>Year</th>
<th>Garbage Collection</th>
<th>Recycling Program</th>
<th>Quality of the Drinking Water</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>87</td>
<td>88</td>
<td>76</td>
</tr>
<tr>
<td>2016</td>
<td>83</td>
<td>81</td>
<td>78</td>
</tr>
<tr>
<td>2017</td>
<td>87</td>
<td>86</td>
<td>84</td>
</tr>
<tr>
<td>2018</td>
<td>92</td>
<td>85</td>
<td>84</td>
</tr>
</tbody>
</table>

Protection from sewer backup

<table>
<thead>
<tr>
<th>Year</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>86</td>
</tr>
<tr>
<td>2016</td>
<td>82</td>
</tr>
<tr>
<td>2017</td>
<td>85</td>
</tr>
<tr>
<td>2018</td>
<td>88</td>
</tr>
</tbody>
</table>

Protection from river flooding

<table>
<thead>
<tr>
<th>Year</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>92</td>
</tr>
<tr>
<td>2016</td>
<td>91</td>
</tr>
<tr>
<td>2017</td>
<td>93</td>
</tr>
<tr>
<td>2018</td>
<td>95</td>
</tr>
</tbody>
</table>

Transit / SOAs

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?”

City recreation facilities

- 2015: 60%
- 2016: 57%
- 2017: 58%
- 2018: 57%

Community Centre facilities

- 2015: 57%
- 2016: 53%
- 2017: 51%
- 2018: 49%

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

- 2015: 41%
- 2016: 43%
- 2017: 42%
- 2018: 40%

Community Centre recreation programs (you or a family member)

- 2015: 39%
- 2016: 36%
- 2017: 31%
- 2018: 30%

Local neighbourhood park

- 2015: 83%
- 2016: 85%
- 2017: 85%
- 2018: 85%

Major park such as Kildonan or St. Vital

- 2015: 80%
- 2016: 84%
- 2017: 82%
- 2018: 80%

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

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

- 24% in 2015
- 31% in 2016
- 32% in 2017
- 34% in 2018

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

- 27% in 2015
- 28% in 2016
- 23% in 2017
- 24% in 2018

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

- 22% in 2015
- 20% in 2016
- 19% in 2017
- 21% in 2018

Building Permits

- 4% in 2015
- 5% in 2016
- 4% in 2017
- 7% in 2018

Public Libraries (you or a family member)

- 75% in 2015
- 68% in 2016
- 71% in 2017
- 66% in 2018