



Citizen Perspective

2016 Citizen Survey

Survey conducted by Prairie Research Associates
May 2016

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, and 2016)
 - 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 2016.
 - Results in a margin of error of $\pm 4.0\%$, 19 times out of 20.
- Data used in presentation is based on people who answered the survey question.
 - (excludes “don’t know” / refused responses)

Survey Changes for 2016



- In 2016, the survey was reviewed and updated
- Questions
 - Wording clarified where possible
 - One new overall question added
- Survey Length
 - Survey size reduced by 15 questions
 - Survey length reduced from 20 minutes to approximately 15 minutes
- Methodology
 - Introduced adjusted quota samples for gender and age
 - Added a cellphone sample

Who Were the Survey Respondents?



The survey was only administered to those who indicated they:

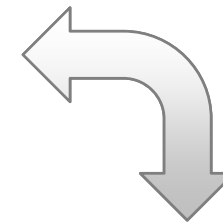
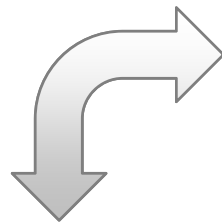
- Are 18 years or older
- Have lived in Winnipeg (or pay taxes to the City) for at least one year
- Agreed to participate in the survey
 - *“this evening we’re talking to residents of Winnipeg regarding issues affecting the City. The survey will take approximately 15 minutes to complete.”*

2016 Overall



Quality of Life – 94%

2012	2013	2014	2015
88%	91%	91%	90%



Value for Tax Dollars – 68%

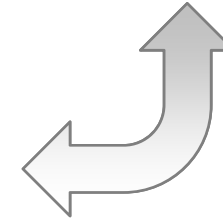
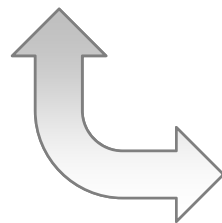
2012	2013	2014	2015
72%	67%	36%	62%

Net Promoter Score
(Recommendation)

5

Overall City Services – 85%

2012	2013	2014	2015
81%	82%	88%	86%



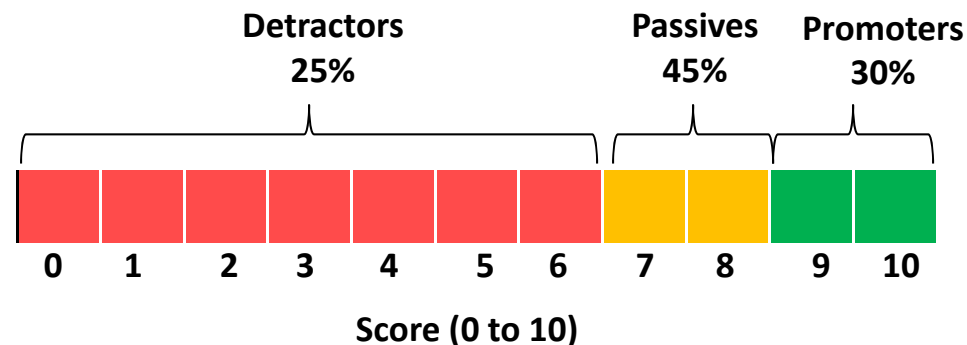
Customer Service – 79%

2012	2013	2014	2015
71%	77%	95%	72%

Net Promoter Score Value



- 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)
- For Winnipeg, 30% are *Promoters* and 25% are *Detractors*, yielding an NPS of 5





Quality of Life

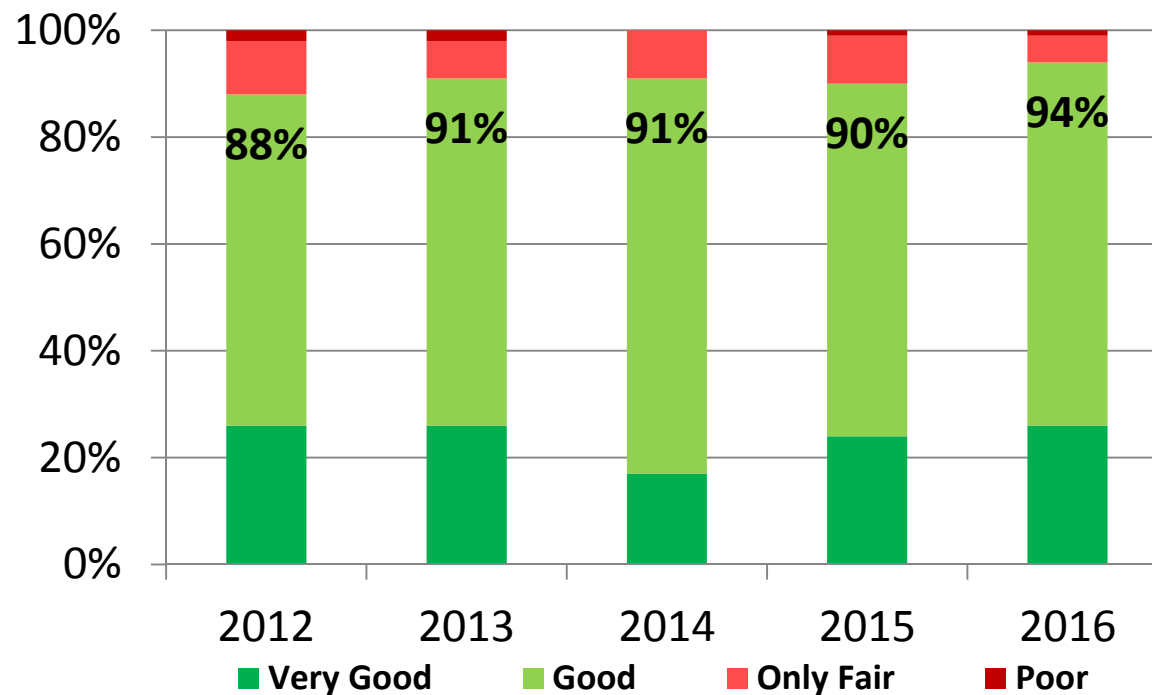
Quality of Life

Quality of Life – 94%

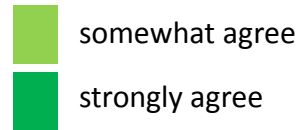
2012	2013	2014	2015
88%	91%	91%	90%

- In 2016, 94% 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?”



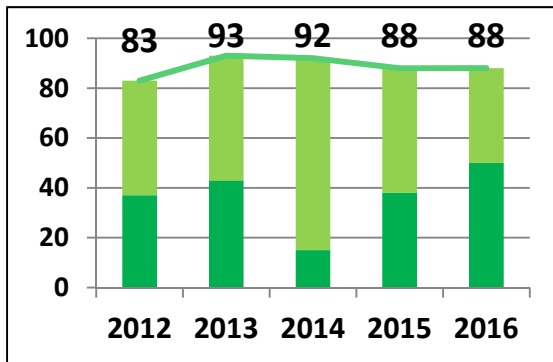
Quality of Life Statements



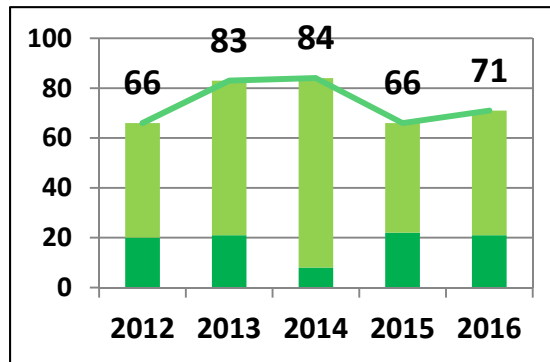
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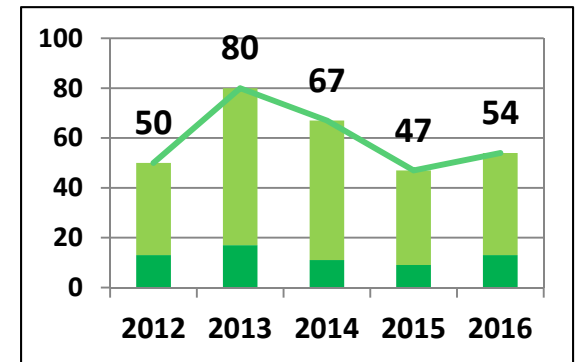
It is easy to get around in Winnipeg by car



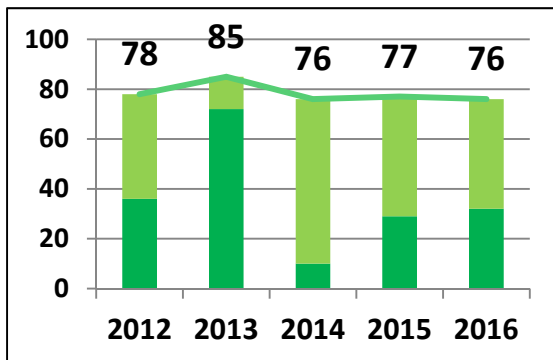
It is easy to get around in Winnipeg by transit



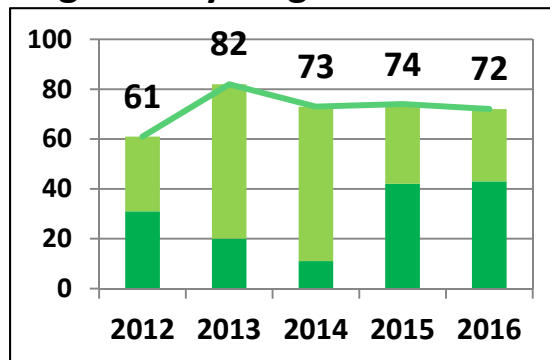
It is easy to get around in Winnipeg by bicycle



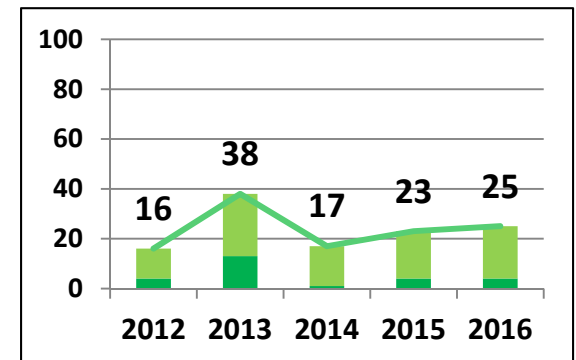
It is easy to get around in Winnipeg by walking



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 - 2016



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

The table at right displays the suggested actions.

	Groupings	Detail of Responses	# of responses	% of cases
55.3%	Roads / Infrastructure	Fix roads and streets	221	44.2%
		Build / fix / improve City infrastructure	29	5.8%
		Improve parking	1	0.3%
		Improve traffic	15	3.0%
		Improve snow clearing	6	1.3%
		More facilities for disabled children / other disabled	4	0.7%
11.8%	Transit	Rapid transit / Improve public transit	59	11.8%
11.7%	Taxation	Lower taxes/revisit taxes	58	11.7%
9.1%	Crime/Policing	Increase police presence	11	2.2%
		Reduce crime/improve law enforcement	19	3.9%
		More security cameras	2	0.4%
		Make downtown safer (less panhandlers)	13	2.6%
7.8%	More Things to Do	More recreational programming/facilities	22	4.4%
		More activities for seniors	3	0.7%
		More activities for youth	13	2.7%
6.4%	Poverty	Address poverty / child poverty/low income	12	2.3%
		Help for underprivileged / Improve social programs	17	3.4%
		Help for immigrants	4	0.7%
6.3%	Economy	Reduce cost of living	1	0.2%
		promote new business / jobs/events tourism	30	6.1%
6.2%	Parks/City Beautification	Cleaner city / cleaner streets	17	3.4%
		Maintain / enhance greenspaces / parks / trees	14	2.8%
5.8%	City Planning	Improve City planning / administration / spending / comm	23	4.6%
		Reduce urban sprawl	6	1.2%
4.3%	Bicycle & Walking Trails	Provide / improve bicycle and walking trails	21	4.3%
4.2%	Housing	Develop affordable housing	7	1.4%
		Address homelessness	14	2.8%
3.9%	Health Care	Improve health care	20	3.9%
2.5%	Recycling/Environment	Improve garbage collection	7	1.4%
		Increase recycling / provide composting	6	1.1%
2.2%	Downtown	Increase downtown's population	11	2.2%
1.3%	Address Racism	Address racism / culture inequality / aboriginal issues	6	1.3%
0.2%	Re-Election	Change the government / Need new government	1	0.2%
11.0%	Other	Other	55	11.00%

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

Actions to Improve Quality of Life – Annual Trend



The table at right displays these suggested actions over the past five years.

Groupings	2012	2013	2014	2015	2016
Roads/Infrastructure	32.9%	28.0%	31.2%	54.0%	55.3%
Transit	10.8%	6.3%	4.2%	7.4%	11.8%
Taxation	1.7%	5.5%	3.2%	6.9%	11.7%
Crime/Policing	39.5%	38.6%	27.8%	12.1%	9.1%
More things to do	7.5%	2.0%	0.7%	10.5%	7.8%
Poverty	6.4%	0.8%	0.0%	3.0%	6.4%
Economy	1.4%	0.4%	0.2%	2.6%	6.3%
City Beautification/Parks	1.5%	0.6%	1.5%	6.5%	6.2%
City Planning	2.5%	0.8%	3.5%	6.4%	5.8%
Bicycle & Walking Trails	8.5%	3.5%	1.3%	4.8%	4.3%
Housing	1.2%	1.6%	0.3%	5.5%	4.2%
Healthcare	0.6%	0.4%	0.4%	1.7%	3.9%
Recycling/Environment	0.2%	0.2%	0.5%	0.4%	2.5%
Downtown Renewal	6.6%	2.4%	2.5%	1.5%	2.2%

The top 3 groupings have been highlighted for the past 3 years.

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



Value for Tax Dollars

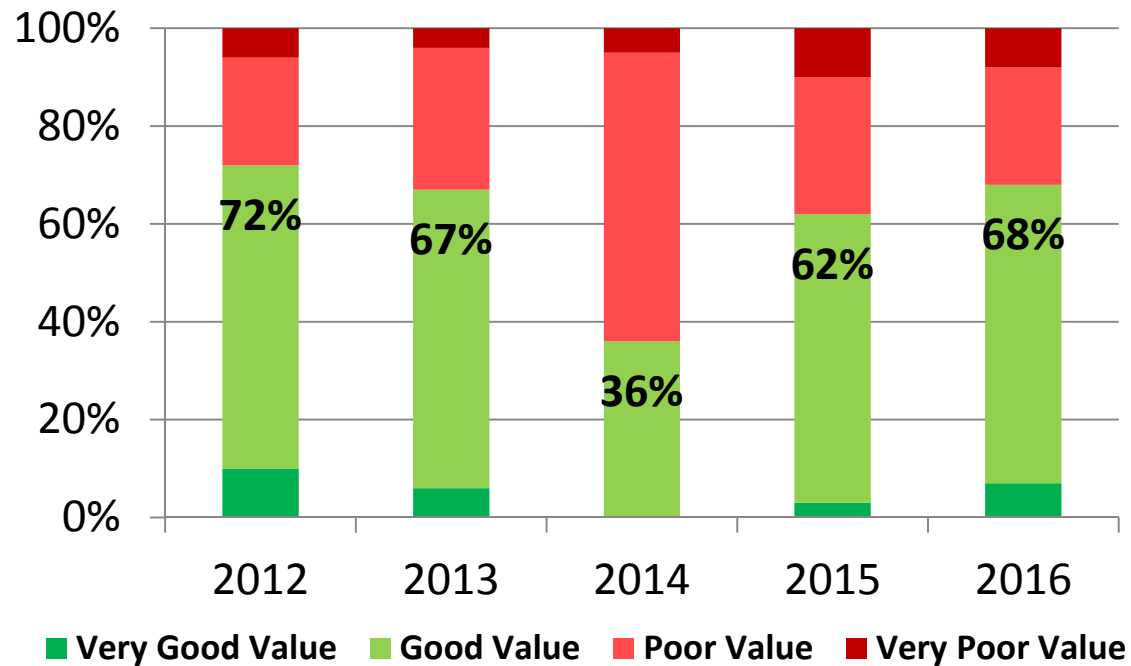
Value for Tax Dollars

Value for Tax Dollars – 68%

2012	2013	2014	2015
72%	67%	36%	62%

- In 2016, 68% of Winnipeggers believe there is good to very good value in their municipal tax dollar.

Citizens were asked “Considering the services provided by the City for your property tax dollars, do you feel you receive...”



Reason for ‘Value Received for Tax Dollars’ Response

Value for Tax Dollars – 68%

2012	2013	2014	2015
72%	67%	36%	62%

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

• Most common reasons for Good / Very Good (68%)

- Satisfaction with services:
 - Snow removal
 - Garbage/recycling
- Feel the City is doing the best it can with the money available

• Most common reasons for Poor / Very Poor (32%)

- Dissatisfaction with spending decisions
- Condition of streets, back lanes, etc.
- Dissatisfaction with services
 - Snow removal
 - Garbage/recycling

NOTE: New question in 2015.



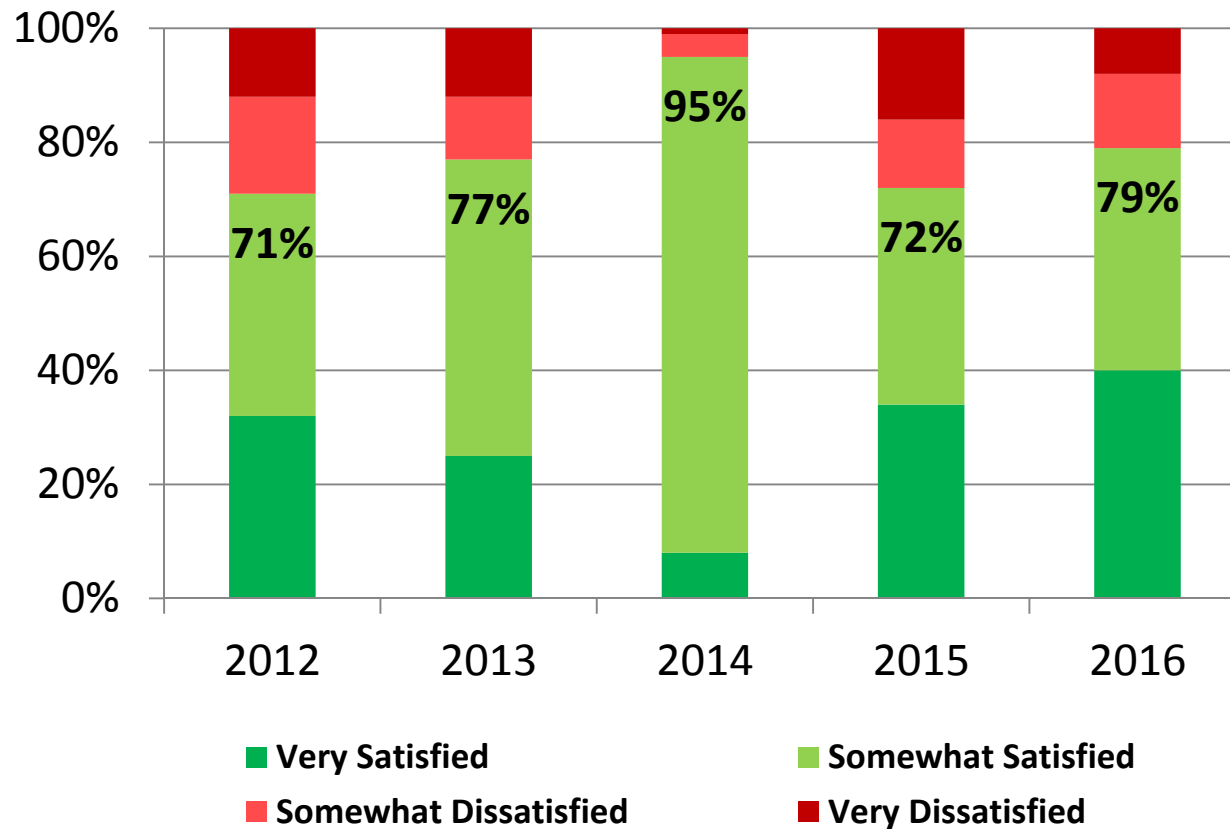
Satisfaction with Customer Service

Satisfaction with Customer Service

Customer Service – 79%

2012	2013	2014	2015
71%	77%	95%	72%

- In 2016, 79% of Winnipeggers who contacted the City were very satisfied or satisfied with the experience.

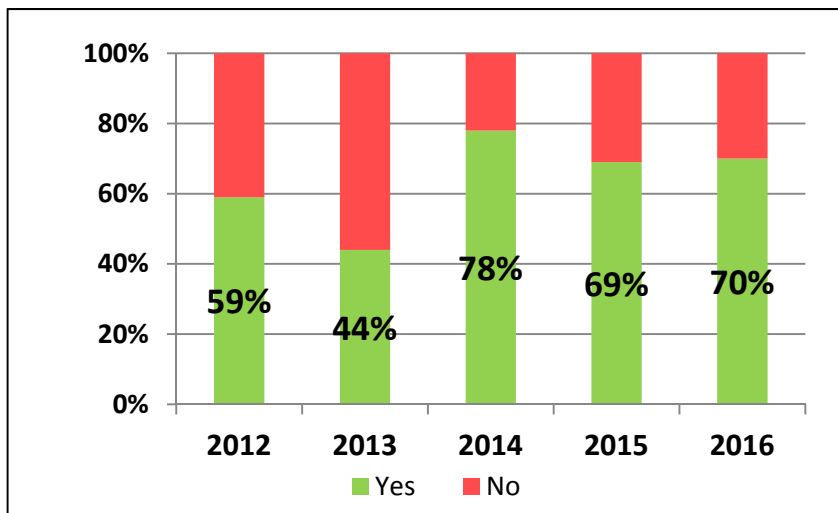


Contact with the City

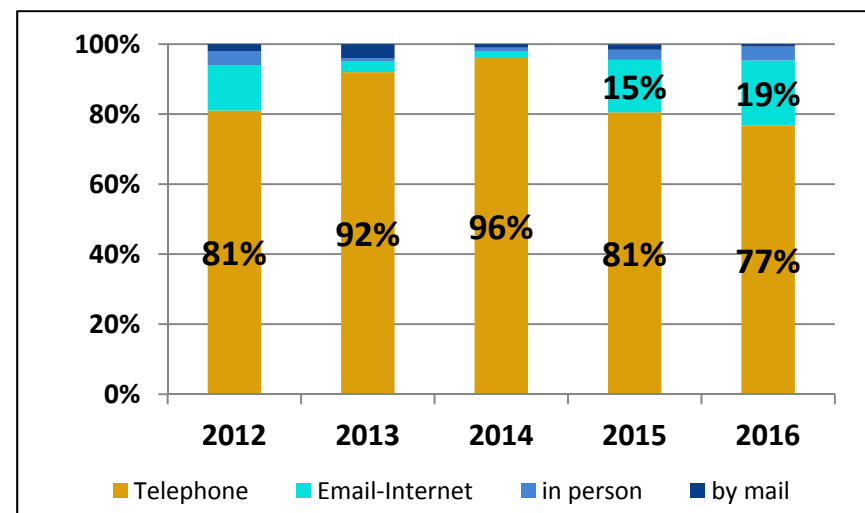
Customer Service – 79%

2012	2013	2014	2015
71%	77%	95%	72%

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%.

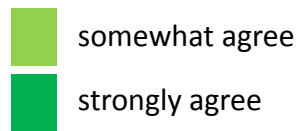
- 70% of the respondents indicated they have contacted the City in the past year.
- Contact by email/internet is increasing, with fewer contacts by telephone

Customer Service Details

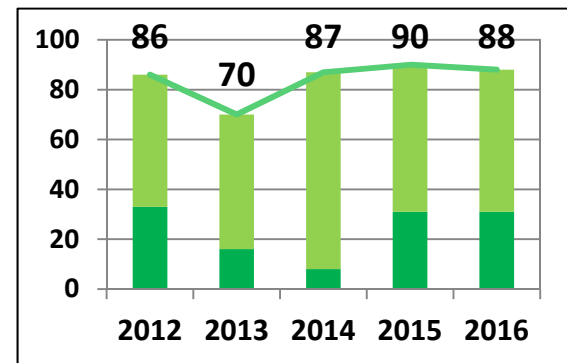
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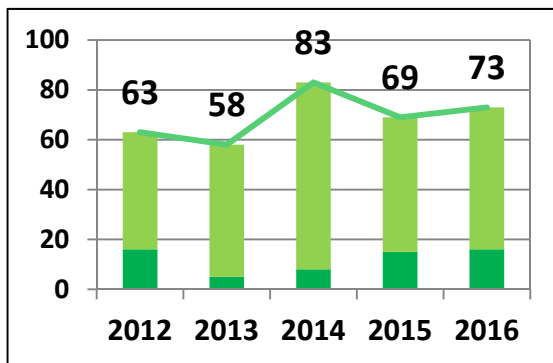
Citizens were asked “Thinking about your personal dealings with the City of Winnipeg and your general impressions...”



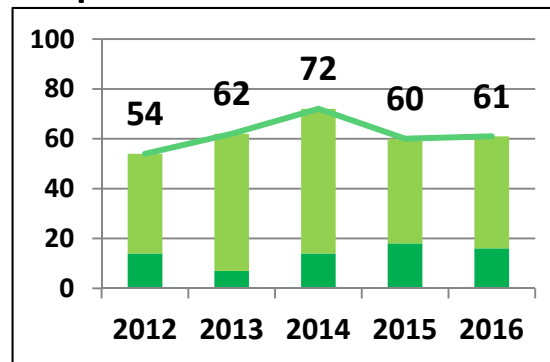
City staff are courteous, helpful and knowledgeable



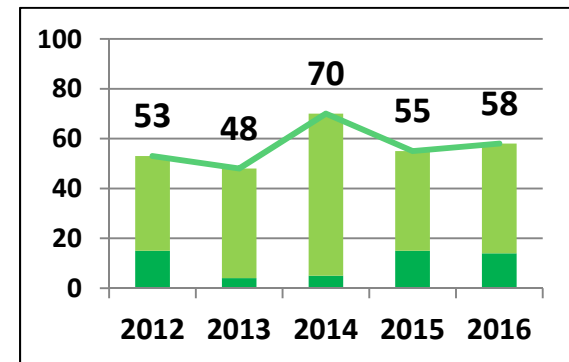
The quality of service from the City is consistently high



The City responds quickly to requests and concerns



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



Improvements to Customer Service - 2016



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

Groupings		Detail of Responses	# of responses	% of cases
41.3%	OK / Satisfied / No suggestion	No suggestions / satisfied	194	32.3%
		Don't know / refused	54	9.0%
29.1%	Improvements relating to staff contact	Less automation / more human contact	26	4.3%
		Better communication btwn departments - response / follow up	9	1.4%
		Staff should be more knowledgeable / better trained	51	8.5%
		Staff should listen / show an interest in wanting to help	30	5.0%
		Staff should respond more quickly to issues / more efficient	48	7.9%
		Better work / less defensive / accept responsibilities	12	2.0%
25.9%	Improvements relating to staffing levels / availability	More people on staff	83	13.8%
		Answer phones quicker / less time on hold / call back system	73	12.1%
10.5%	Improvements relating to systems	Improve 311	14	2.3%
		More information on city services / advertise more	4	0.7%
		Ability to contact departments directly	26	4.3%
		Get rid of 311	9	1.5%
		Improve website / Better use of technology	10	1.7%
3.3%	Hrs of operation	Staff more accessible – longer hours / email contact	20	3.3%
5.5%	Other	Other	33	5.5%

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

Improvements Customer Service – Annual Trend



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

The table below displays these suggested actions over the past five years.

Groupings	2012	2013	2014	2015	2016
OK / Satisfied / No Suggestions	58.9%	67.8%	47.9%	37.7%	41.3%
Improvements relating to staff contact	10.7%	10.7%	9.5%	33.4%	29.1%
Improvements relating to staffing levels	10.9%	17.0%	34.2%	24.3%	25.9%
Improvements relating to systems	15.9%	15.8%	5.0%	25.4%	10.5%
Improve hours of operation	0.0%	0.0%	0.0%	4.2%	3.3%
Other	3.6%	4.8%	1.7%	6.5%	5.5%

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



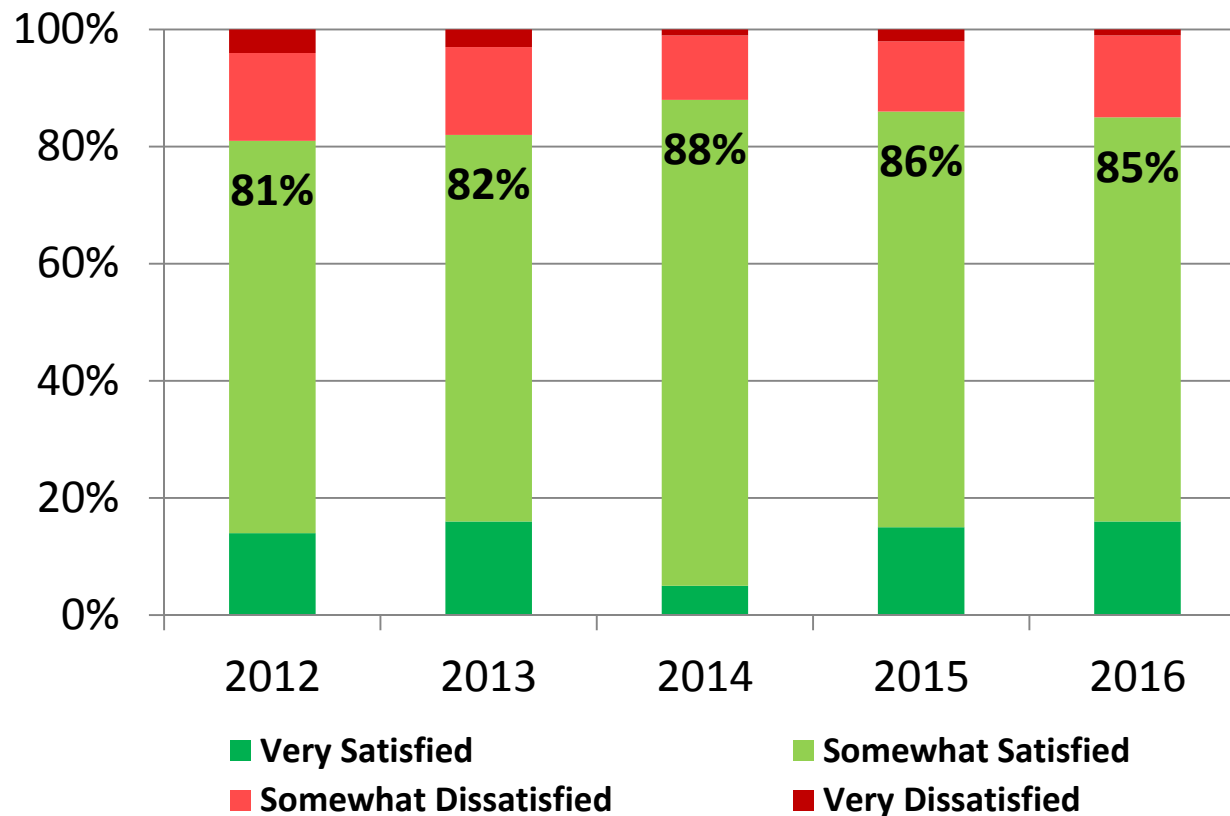
Satisfaction with City Services

Satisfaction with Overall City Services

Overall City Services – 85%

2012	2013	2014	2015
81%	82%	88%	86%

- In 2016, 85% 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 2015
Public Safety (Fire Paramedic, Police)	1.8	78%	↓
Infrastructure (Roads, Water)	2.2	68%	↓
Community Services (Libraries, Recreation)	2.7	37%	↔
Property & Development (Land use planning)	3.3	18%	↑



Individual Services by Department

Citizens were asked:

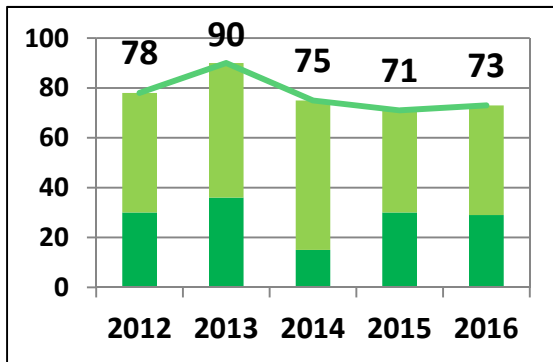
“Now, I'm going to read you a list of services that are provided by the City of Winnipeg. Please tell me whether you are very dissatisfied, somewhat dissatisfied, somewhat satisfied or very satisfied with each of the following services.”

Public Works

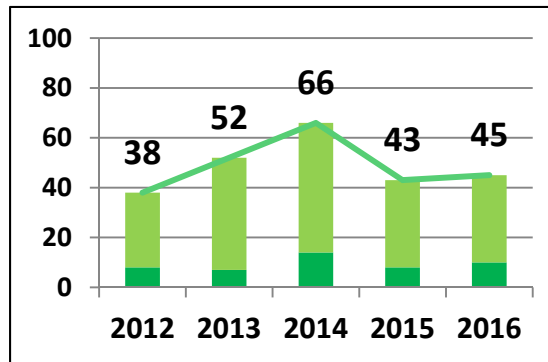
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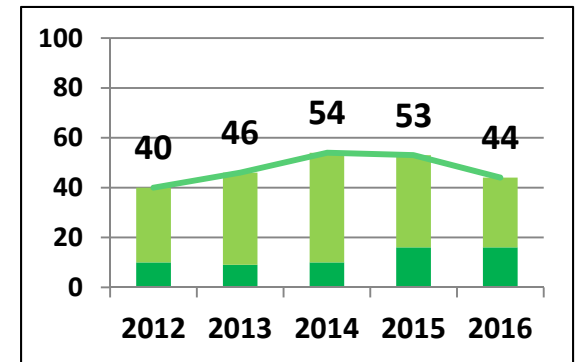
Snow Removal



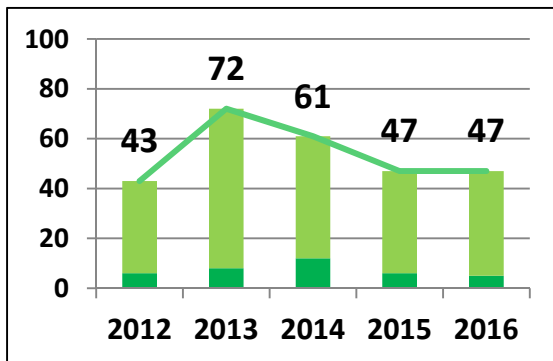
Condition of major streets



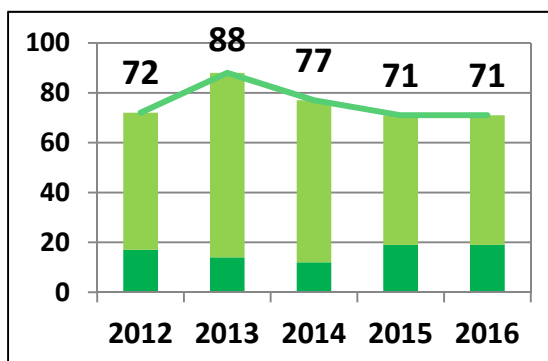
Condition of residential streets





Management of rush hour traffic flow



City's efforts in keeping the city clean & beautiful



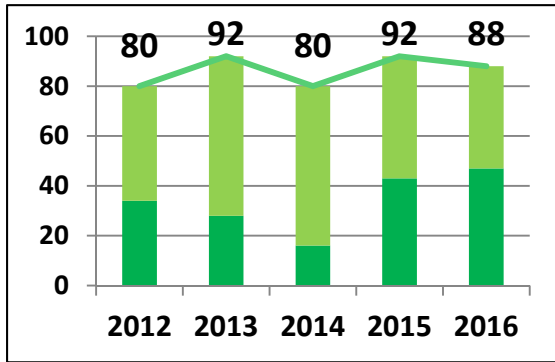
 somewhat satisfied
 very satisfied

Public Works (cont'd)

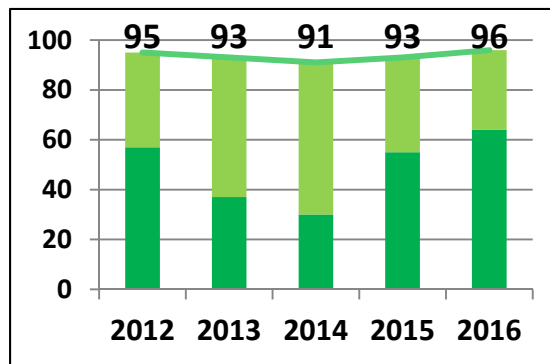
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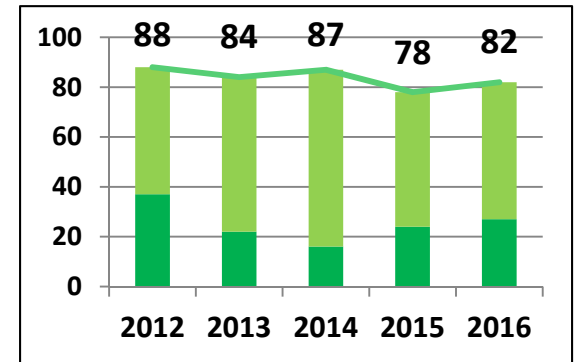
Condition of local parks



Condition of major parks*



Insect Control



somewhat satisfied
 very satisfied

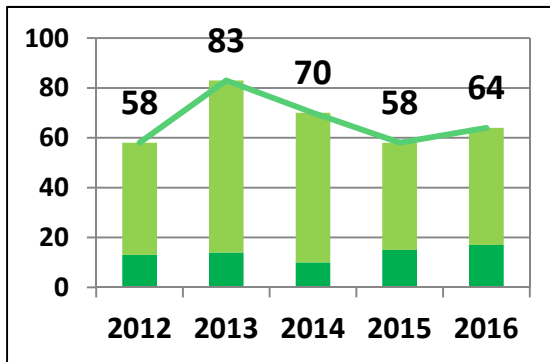
* Those who indicated they have used the service.

Police Service

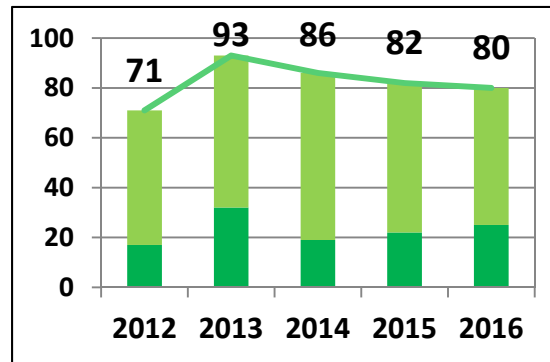
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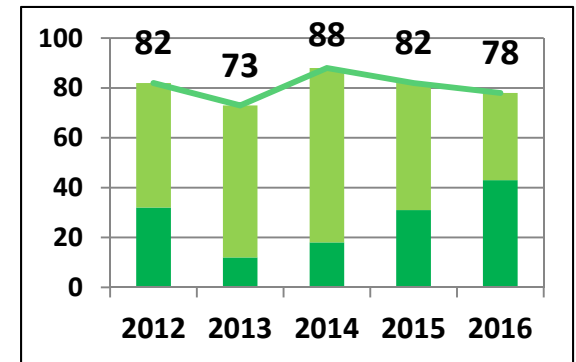
Enforcement of traffic laws



Efforts in crime control



Police response to 911 calls*



■ somewhat satisfied
■ very satisfied

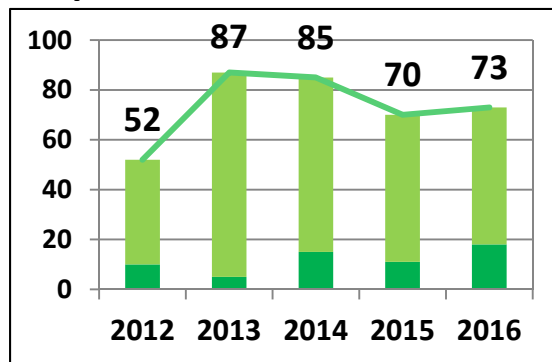
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Community Services

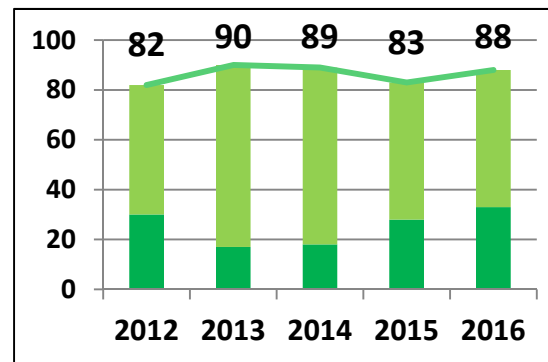
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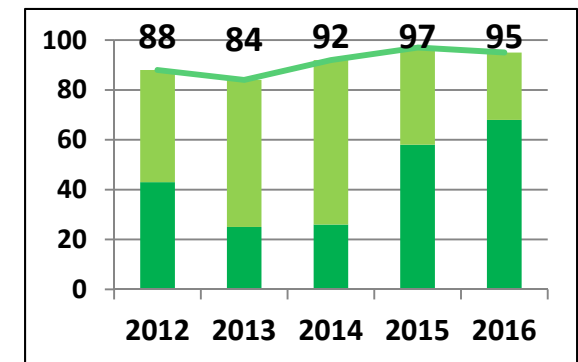
City's efforts to ensure residential property standards are met through inspections



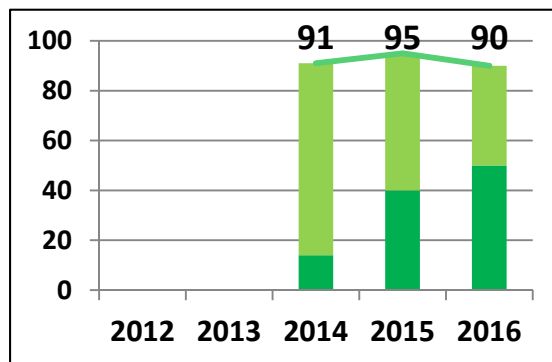
City support for arts, entertainment, & culture



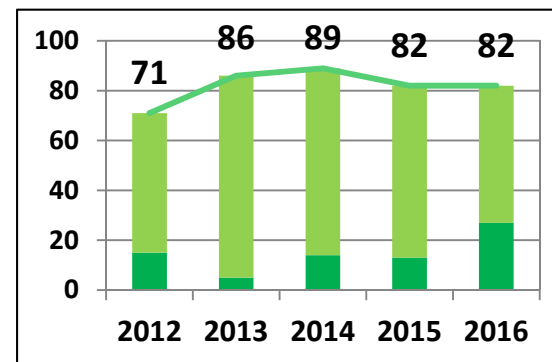
Public Libraries*



City-operated recreation programs*



Condition of City-operated recreation facilities*



■ somewhat satisfied
■ very satisfied

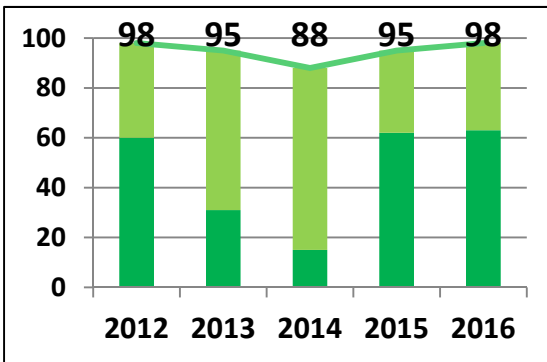
* Those who indicated they have used the service.

Fire Paramedic Service

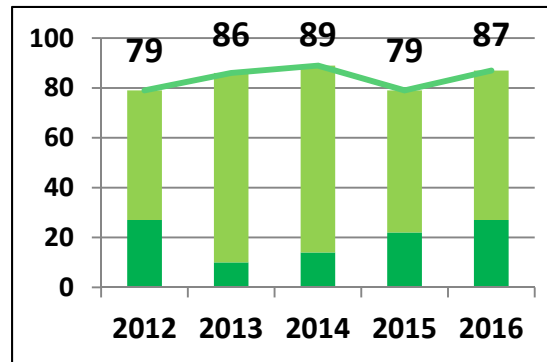
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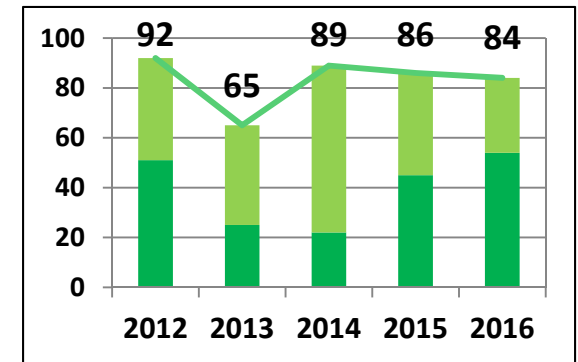
Fire & rescue response to fire emergencies



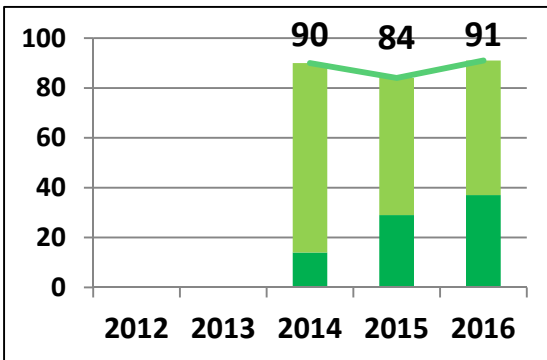
Level of City preparedness to respond, assist



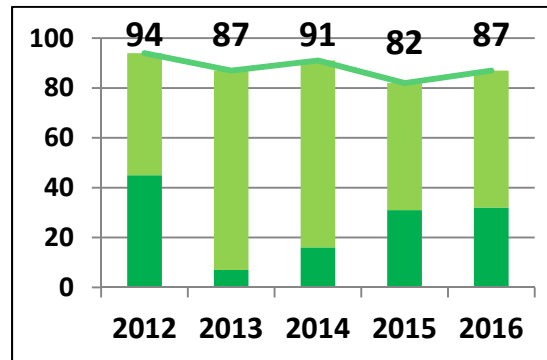
Emergency response capability for medical emergencies*





Safety of existing buildings through fire inspections & enforcement



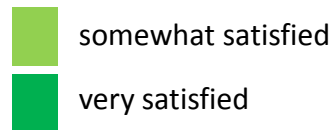
Fire & injury prevention education



 somewhat satisfied
 very satisfied

* Those who indicated they have used the service.

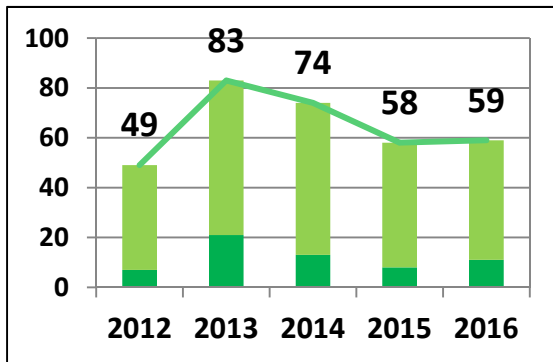
Planning, Property & Development



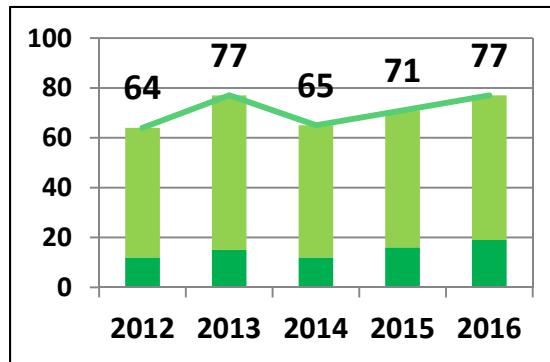
Overall City Services – 85%

2012	2013	2014	2015
81%	82%	88%	86%

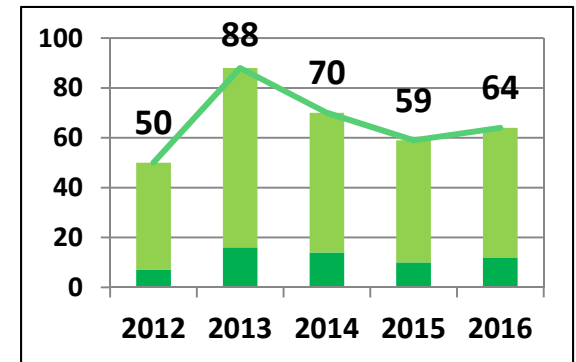
City funding for improving inner city housing



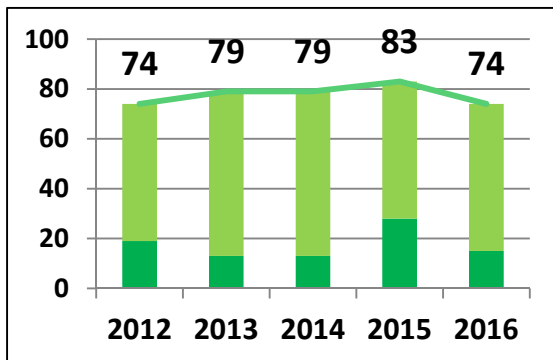
Downtown renewal



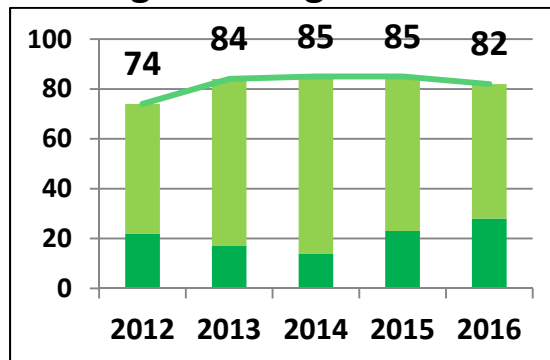
Community planning (to guide growth & change)



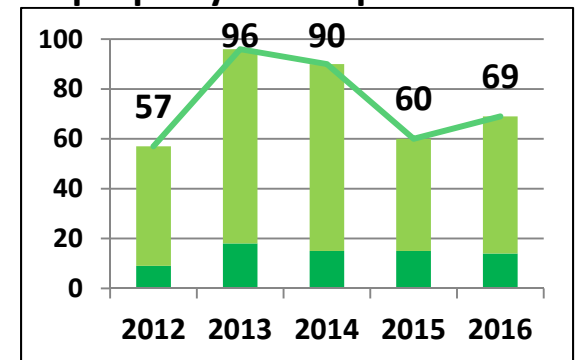
City's effort in promoting economic development



City's efforts in preserving heritage buildings



Zoning regulations & building permits to regulate building & property development

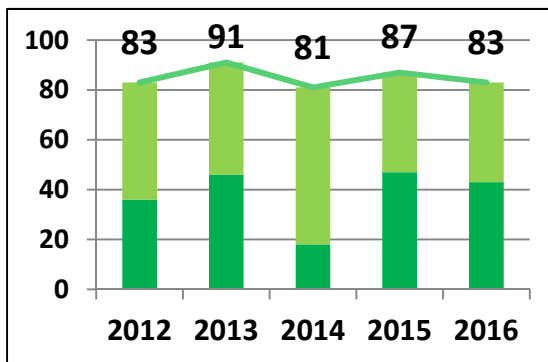


Water and Waste

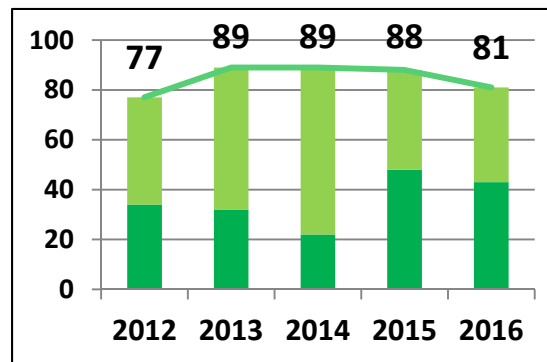
Overall City Services – 85%

2012	2013	2014	2015
81%	82%	88%	86%

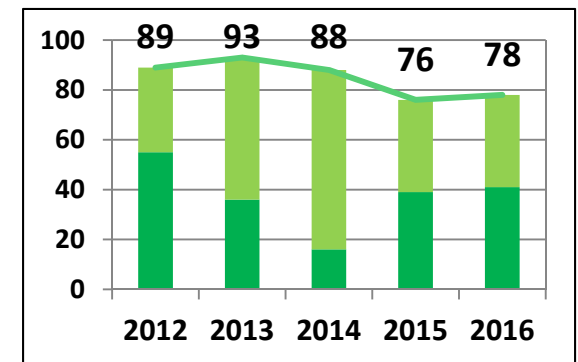
Garbage collection



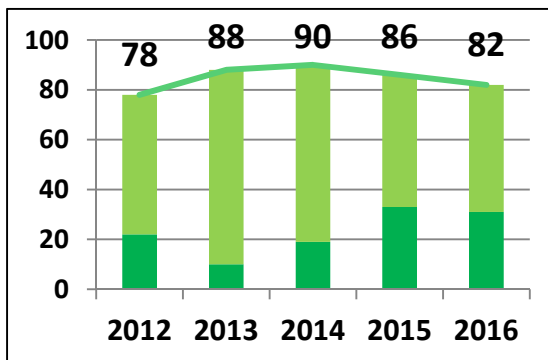
Recycling program



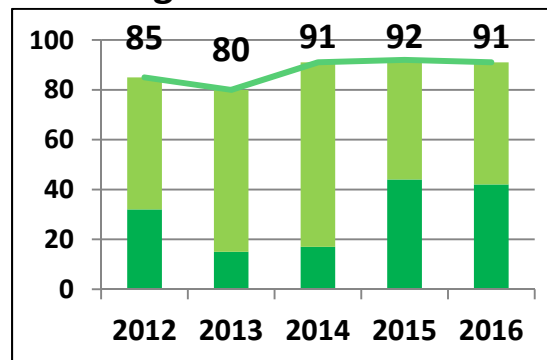
Quality of the drinking water





Protection from sewer backup



Protection from river flooding



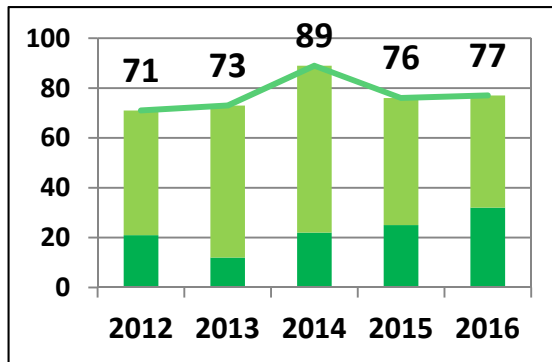
 somewhat satisfied
 very satisfied

Transit / SOAs

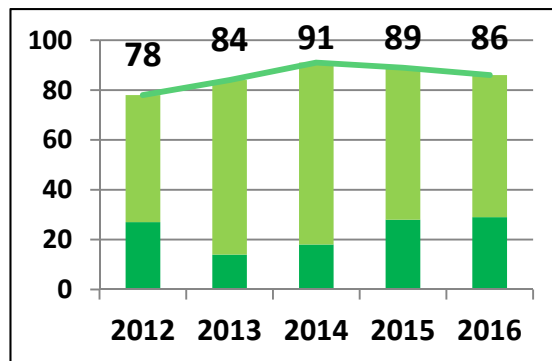
Overall City Services – 85%

2012	2013	2014	2015
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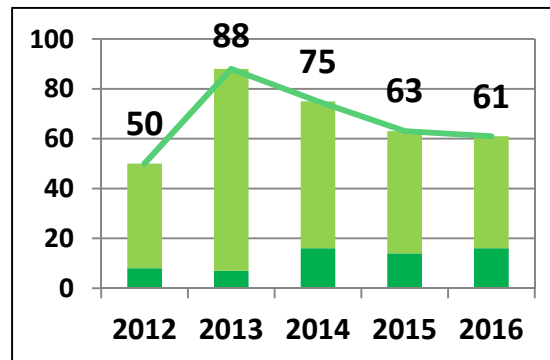
Public transit*



Animal Services



Availability & convenience of on-street parking



somewhat satisfied
 very satisfied

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

