



# ST. JOHN'S

## 2018 Citizen Survey Report

Presented by:



welcome to · bienvenue à

ST. JOHN'S

Section I

# BACKGROUND AND OBJECTIVES

- In 2015, the City of St. John's rolled out its first strategic plan which has been used to provide direction for council and the city's operations based on five core values.<sup>1</sup>
- As council begins the process for developing a new strategic plan and budget for the 2019-2021 timeframe, it was determined that a Citizen Survey was needed to help guide this process.
- The survey will also provide a benchmark from which the City can measure any changes in priorities and provide ongoing performance measurement as the City begins to implement the new strategic plan in 2019 and continuous improvement.
- This will be one of many inputs used to guide the new strategic plan and budget.

<sup>1</sup> 2017242 RFP Statistically Valid Citizen Survey

- The key objectives of this research are to:
  - Provide input into the City's strategic planning and budget processes;
  - Identify and confirm strategic priorities;
  - Identify priority issues and priority programs and services;
  - Gauge citizen awareness, perception of, and satisfaction with, City programs and services;
  - Identify gaps in services (gap analysis of service importance vs. satisfaction);
  - Create a benchmark from which to measure progress/improvement over time; and
  - Provide data for the City's developing performance management systems.

Section II

# METHODOLOGY

- A telephone methodology was used for this study with both active landline and cellular numbers making up the sampling frame.
- The survey was conducted between March 5<sup>th</sup> and March 21<sup>st</sup>, 2018.
- A total of 502 surveys were completed (313 landline / 189 cell) resulting in an overall margin of error of +/- 4.4 percentage points 19 times out of 20.
- 100 surveys were completed in each of the 5 Wards of the City.
- The questionnaire was designed by MQO Research in consultation with the City of St. John's. The average survey length was approximately 18 minutes.
- The final results were weighted by age and gender based on the most recent census data. Weighting was also applied by cell vs. landline.

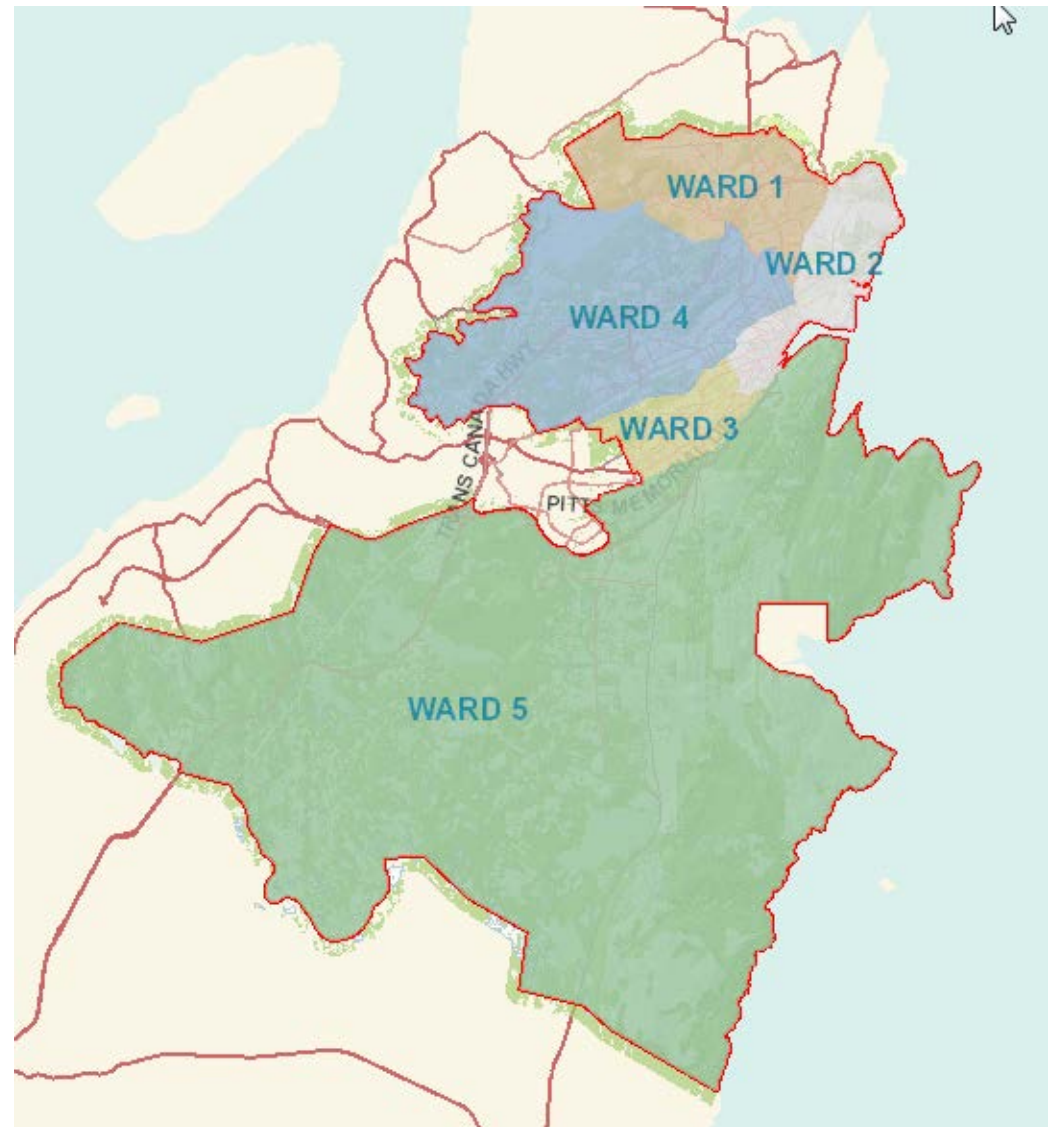
- A stratified sampling approach by ward was used for this study. The table below outlines the margin of error for the results at the ward level.

**Table 1: Margin of Error**

Ward	Sample Size	MOE
Ward 1	101	± 9.8%
Ward 2	101	± 9.8%
Ward 3	100	± 9.8%
Ward 4	100	± 9.8%
Ward 5	100	± 9.8%

- Results are presented at the overall level with key differences by ward or other demographic sub-group noted throughout.
- For all rating questions (1-10 scale), ratings of 8 or higher are presented.

- The adjacent map provides an overview of the ward boundaries for the City of St. John's.



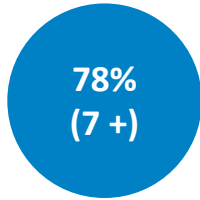


Section III

# EXECUTIVE SUMMARY

## Overall Perceptions

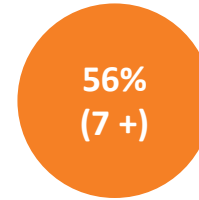
### Quality of Life



### Overall Satisfaction



### Value for Tax Dollars



## Priorities for Citizens

**Non-Essential  
Infrastructure:  
Top Priority**

**Affordable  
Housing  
61%**

### Program and Service Priority Areas

Primary Areas for Improvement

- Road maintenance
- Road snow clearing
- Traffic planning
- Sidewalk snow clearing

Sustain & Reinforce

- Garbage collection
- Residential water/sewer repairs
- Parks, open spaces and trails
- Recreation facilities and programs
- Curbside recycling
- Public transportation services

Secondary Areas for Improvement




- Permits and inspections
- Land use planning
- Heritage preservation
- Parking services
- Arts/cultural grants

Watch & Maintain




- Animal care and adoption services
- 311/Access St. John's
- Community events

## Communications and Engagement

### Top Performing Areas

-  Courteous, helpful and knowledgeable **87% Agree**
-  Providing desired information **85% Agree**
-  Curb it!/311 apps (among users – 44%) **73% Rating 8 +**

### Areas for Improvement

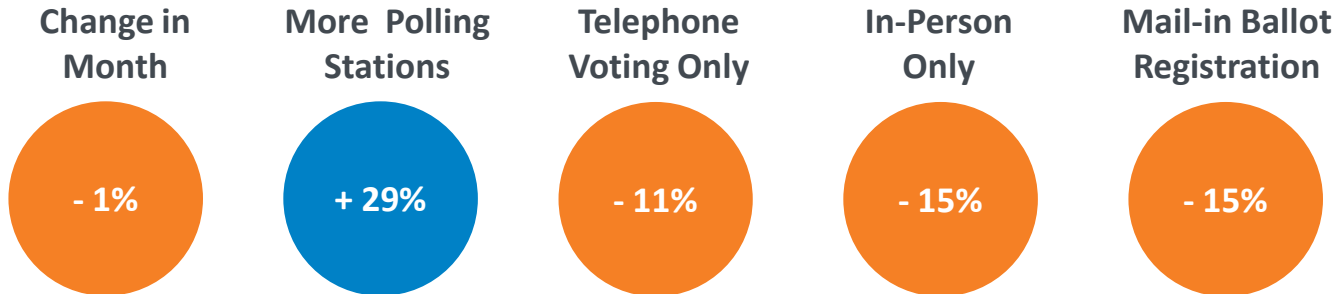
-  Opportunities for meaningful input **54% Agree**
-  Being accountable **50% Good/Excellent**
-  Managing City's money responsibly **40% Good/Excellent**

## Municipal Elections

### Satisfaction with Mail-In System



Indicator of Potential Impact on Voter Turnout  
(% More Likely - % Less Likely)

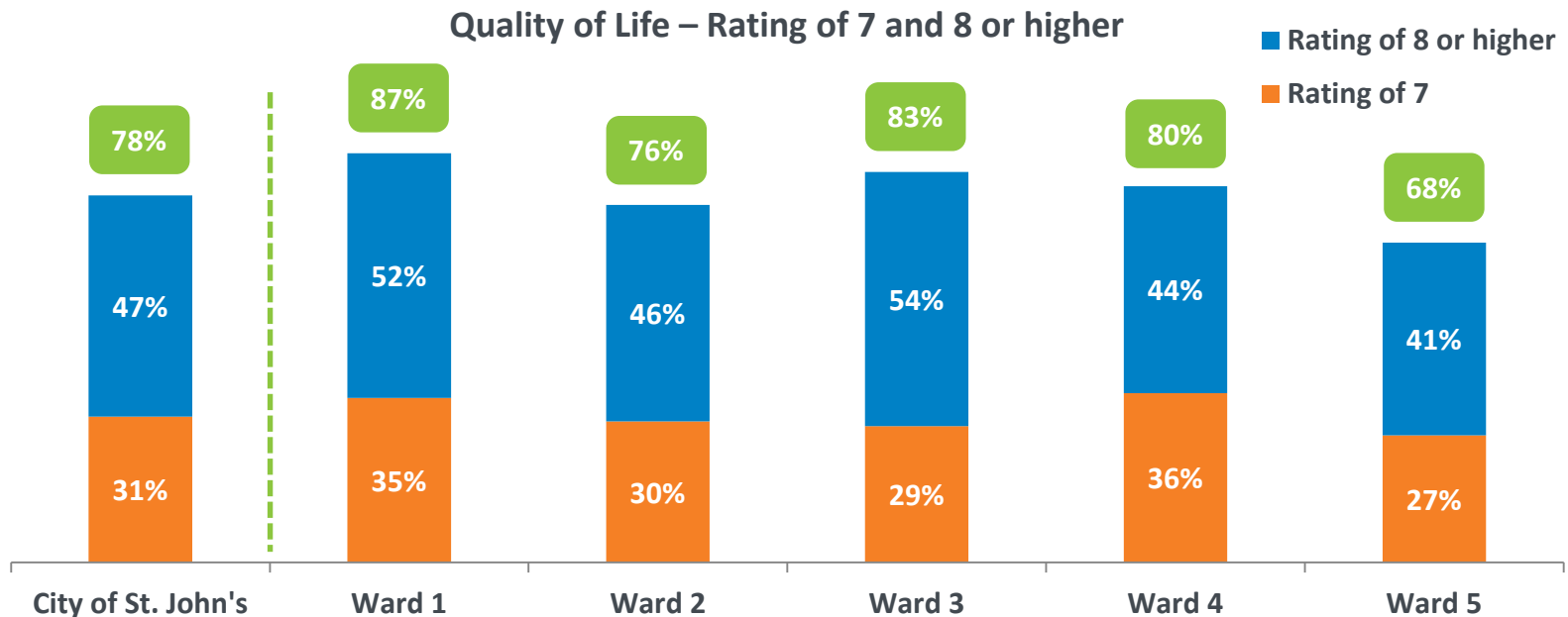


Section IV

# QUALITY OF LIFE

# Overall Quality of Life

- Overall, residents of St. John's have a relatively positive view of the quality of life in the City. Almost one-half (47%) rated the quality of life in the city an 8 or higher (on a 10-point scale).
- There was also a significant group who gave a rating of 7 (31%) indicating this group is fairly happy but feel there are some areas for improvement.
- Looking at results by ward, perceptions were most positive in Ward 1 and Ward 3.
- The perceived quality of life also increased by age with those 55 plus being the most positive (63% giving ratings of 8 or higher).



Q. How would you rate the overall quality of life in the City of St. John's today?

- Respondents were also asked what the city should focus on outside of basic services to improve the quality of life for residents.
- Almost one-quarter (23%) were unable to provide a response to this question.
- Most people were unable to think beyond the basic services with the top mentions including better road maintenance (25%) and improved snow clearing (12%). The word cloud below provides an overview of responses to this question. Service areas that were mentioned more frequently are larger in size.



Table 2: Quality of Life – Top Mentions

Area for improvement	%
Road maintenance	25%
Snow clearing	12%
Lower taxes	9%
Green spaces	8%
Public transportation	7%
Recreation, art and culture	5%
Traffic planning	5%
Development and affordable housing	4%
Economic development	4%
Senior services	4%
Recycling	4%
Improving downtown	4%

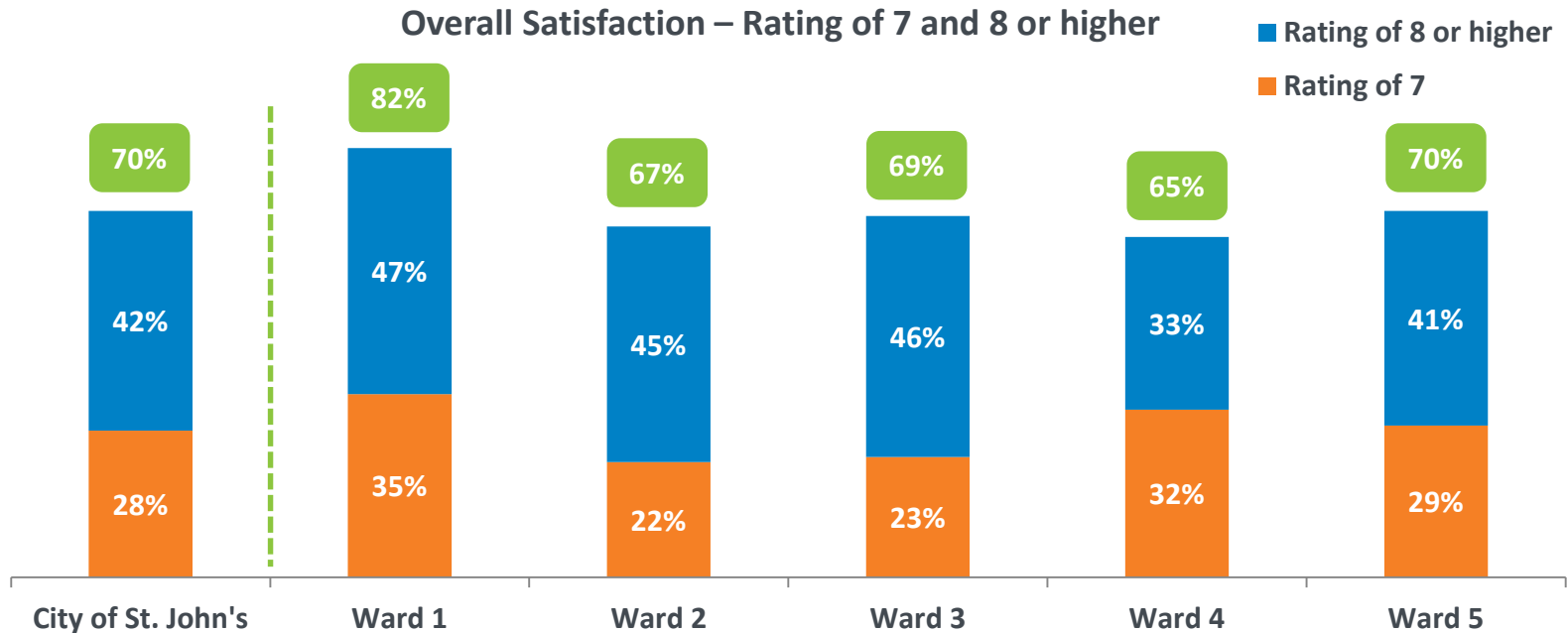
Q. Other than basic services the City of St. John's offers, what should the City focus on over the next 5 years to improve the quality of life for residents?

Section V

# PROGRAMS AND SERVICES

# Overall Satisfaction

- Overall, residents are mostly satisfied with the programs and services provided by the City. More than four-in-ten (42%) gave a rating of 8 or higher.
- There was also a significant group who gave a rating of 7 (28%) indicating this group is fairly satisfied but feel there is room for improvement.
- Looking at results by ward, residents of Ward 4 were the least satisfied (8 or higher).
- Similar to perceptions of quality of life, satisfaction with programs and services increased with age with those 55 plus being the most positive (53% rating 8 or higher).



Q. Overall, how satisfied are you with the services and programs provided by the City to residents?



- Residents who rated their overall satisfaction with city programs and services as a 6 or less (28%; n=133) were asked to elaborate on why they gave a lower rating.
- In general, many comments focused around concerns with snow clearing and roads as well as the current level of taxation.
- Concerns were also mentioned with respect to a lack of programming across various age groups (youth and seniors in particular).



Table 3: Areas of Dissatisfaction – Top Mentions

	%
Snow clearing issues	31%
General service issues	25%
Lack of recreation programs/activities	17%
Poor road maintenance	17%
Poor public transportation	11%
High taxes	11%
Garbage collection and recycling issues	7%

Q. Why did you rate your overall satisfaction a <B2a>?

- In order to assess the programs and services currently provided by the City of St. John's, residents were provided with a list of 18 service areas and asked to rate the importance of each service area and to what extent they are satisfied with each.
- The service areas evaluated as part of the survey included:

**Table 4: Service Areas Evaluated**

Grants and supports to arts, festivals, and cultural activities	Public transportation services
Community events	Garbage collection
Animal care and adoption services	Curbside recycling
Recreation and leisure facilities, programs and activities	Traffic planning and management
Parks, open spaces, and trails	Parking services
Road maintenance	Road snow clearing
Land use planning	Sidewalk snow clearing
Heritage preservation	311/Access St. John's
Permits and inspections process	Residential water and sewer repairs

- The following table shows the perceived importance of each of the 18 services areas that were evaluated.

Table 5: Importance

	% rating 8 or higher
Road snow clearing	97%
Garbage collection	97%
Residential water and sewer repairs	96%
Road maintenance	94%
Parks, open spaces, and trails	93%
Curbside recycling	84%
Traffic planning	84%
Sidewalk snow clearing	81%
Public transportation services	80%
Recreation facilities/programs/activities	80%
Permits and inspections process	76%
Animal care and adoption services	73%
Land use planning	71%
311/Access St. John's	69%
Heritage preservation	68%
Parking services	65%
Arts/cultural grants	62%
Community events	57%

- The following table shows the level of satisfaction with each of the 18 services areas that were evaluated.

Table 6: Satisfaction

	% rating 8 or higher
Garbage collection	86%
Parks, open spaces, and trails	72%
Curbside recycling	72%
Residential water and sewer repairs	68%
311/Access St. John's	68%
Animal care and adoption services	65%
Recreation facilities/programs/activities	61%
Community events	55%
Public transportation services	47%
Permits and inspections process	45%
Arts/cultural grants	38%
Road snow clearing	36%
Heritage preservation	36%
Traffic planning	29%
Land use planning	28%
Parking services	28%
Sidewalk snow clearing	20%
Road maintenance	10%

- First, a **gap analysis** was conducted to identify the difference between the perceived importance of each service area and residents' level of satisfaction. Through gap analysis, we can identify those service attributes for which there is a gap in how important an attribute is to a customer and how the City is performing.
- As illustrated in the sample table below, the gap analysis identifies key attributes where the perceived current service level matches the importance of that particular service area and where there is a "gap".

Table 7: Gap Analysis - Example

	Importance % rating 8 or higher	Satisfaction % rating 8 or higher	Difference (Percentage Points)
Service Area #1	56%	52%	- 4
Service Area #2	75%	23%	- 52

Service area #2  
highlights a  
significant gap that  
should be  
addressed.

Q. How important is <service area>?

Q. And how would you rate your overall level of satisfaction with <service area>?

- The following table shows the difference between the perceived importance of each service area and residents' level of satisfaction.
- As the table demonstrates, the largest gaps exist for areas related to roads and transportation (i.e. maintenance, snow clearing and traffic planning).
- Conversely, there was essentially no gap for community events and Access St. John's.

Table 8: Gap Analysis

	Importance % rating 8 or higher	Satisfaction % rating 8 or higher	Difference (Percentage Points)
Road maintenance	94%	10%	-84
Road snow clearing	97%	36%	-61
Sidewalk snow clearing	81%	20%	-61
Traffic planning	84%	29%	-55
Land use planning	71%	28%	-43
Parking services	65%	28%	-37
Public transportation services	80%	47%	-33
Heritage preservation	68%	36%	-32
Permits and inspections process	76%	45%	-31
Residential water and sewer repairs	96%	68%	-28
Arts/cultural grants	62%	38%	-24
Parks, open spaces, and trails	93%	72%	-21
Recreation facilities/programs/activities	80%	61%	-19
Curbside recycling	84%	72%	-12
Garbage collection	97%	86%	-11
Animal care and adoption services	73%	65%	-8
Community events	57%	55%	-2
311/Access St. John's	69%	68%	-1

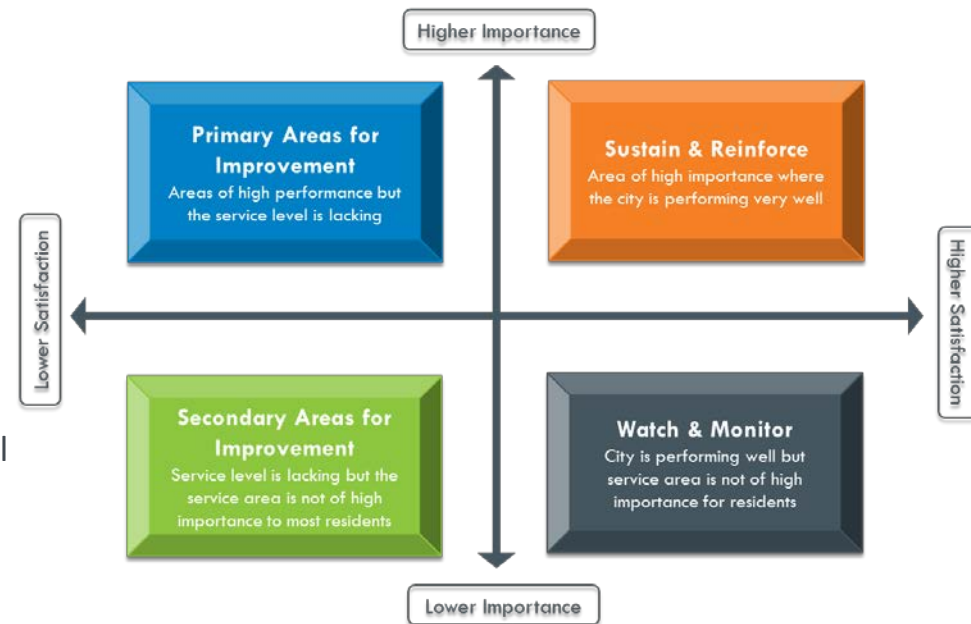
Action grids visually combine the perceived importance of each service attribute with the residents' level of satisfaction. This technique places each service area in one of four "quadrants" or priority areas.

**Upper Left** Quadrant: Service areas identified as most important but where the city is underperforming. These should be the primary areas for improvement.

**Upper Right** Quadrant: Service areas identified as most important and where the city is already performing well. These are the service areas to sustain and reinforce.

**Lower Left** Quadrant: Service areas identified as relatively less important. Although the city is underperforming in these areas, addressing them will have less impact on residents. However, it may be important for sub groups and should be secondary areas for improvement.

**Lower Right** Quadrant: Service areas where the city is performing well but are of relatively less importance. These should be watched and monitored.



# Action Grid – City of St. John's

**Primary Areas for Improvement:**

- Road maintenance
- Road snow clearing
- Traffic planning
- Sidewalk snow clearing

**Sustain and Reinforce:**

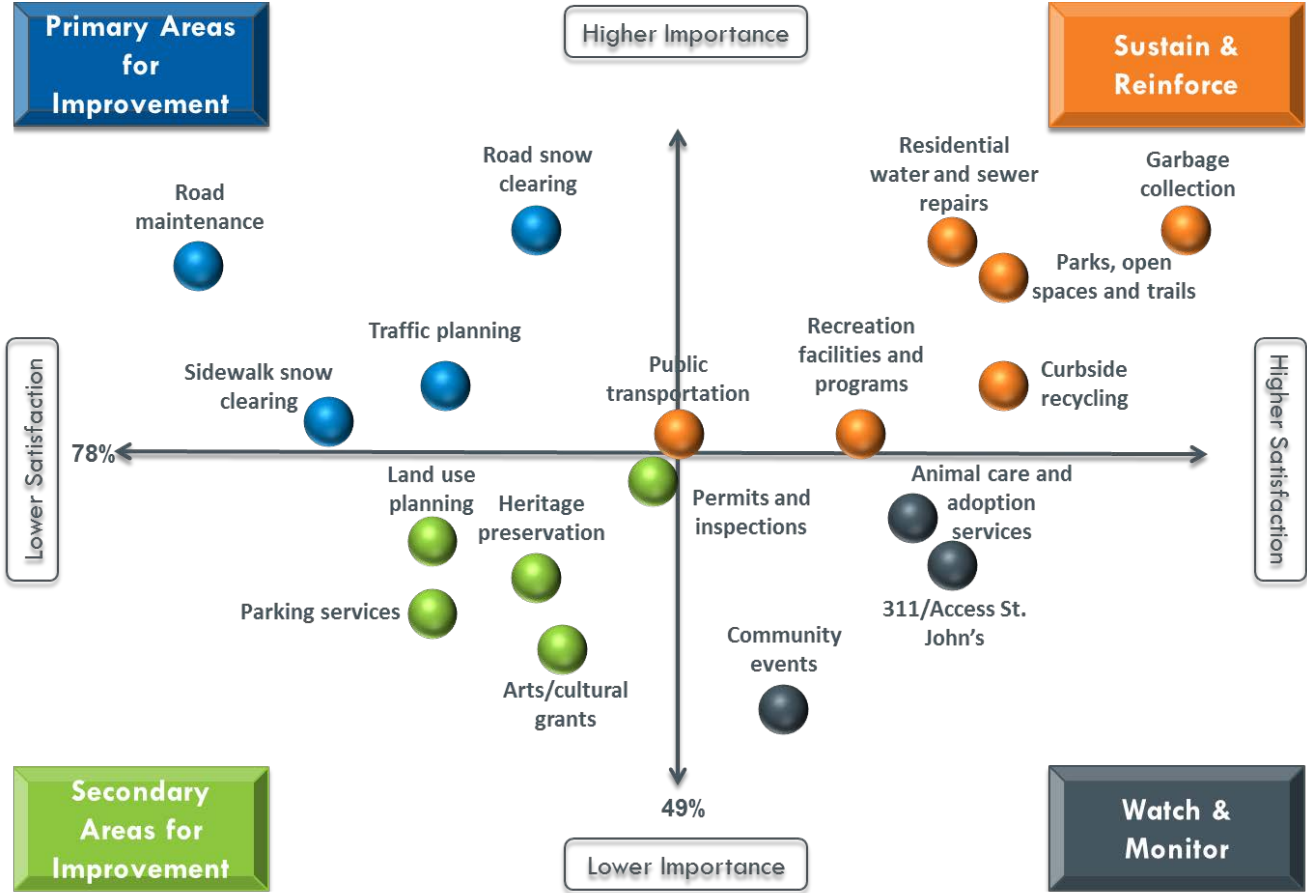
- Garbage collection
- Residential water and sewer repairs
- Parks, open spaces and trails
- Recreation facilities/programs/activities
- Curbside recycling
- Public transportation services

**Secondary Areas for Improvement:**

- Permits and inspections
- Land use planning
- Heritage preservation
- Parking services
- Arts/cultural grants

**Watch and Monitor:**

- Animal care and adoption services
- 311/Access St. John's
- Community events





# Action Grid – Ward 1

**Primary Areas for Improvement:**

- Road maintenance
- Sidewalk snow clearing
- Public transportation
- Road snow clearing
- Traffic planning

**Sustain and Reinforce:**

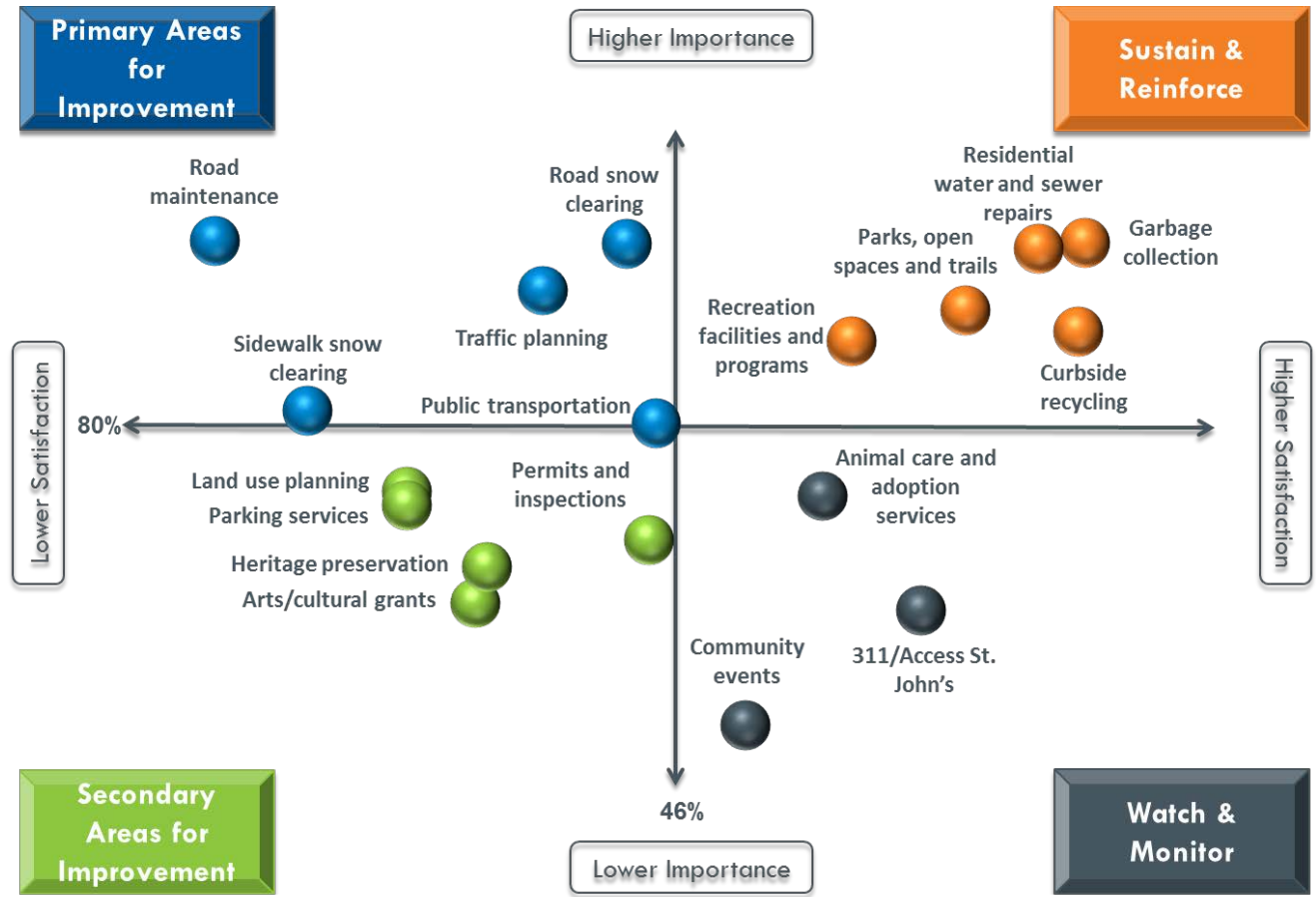
- Recreation facilities and programs
- Parks, open spaces and trails
- Residential water and sewer repairs
- Garbage collection
- Curbside recycling

**Secondary Areas for Improvement:**

- Land use planning
- Parking services
- Heritage preservation
- Arts/cultural grants
- Permits and inspections

**Watch and Monitor:**

- Animal care and adoption services
- Community events
- 311/Access St. John's



# Action Grid – Ward 2

**Primary Areas for Improvement:**

- Road maintenance
- Sidewalk snow clearing
- Road snow clearing

**Sustain and Reinforce:**

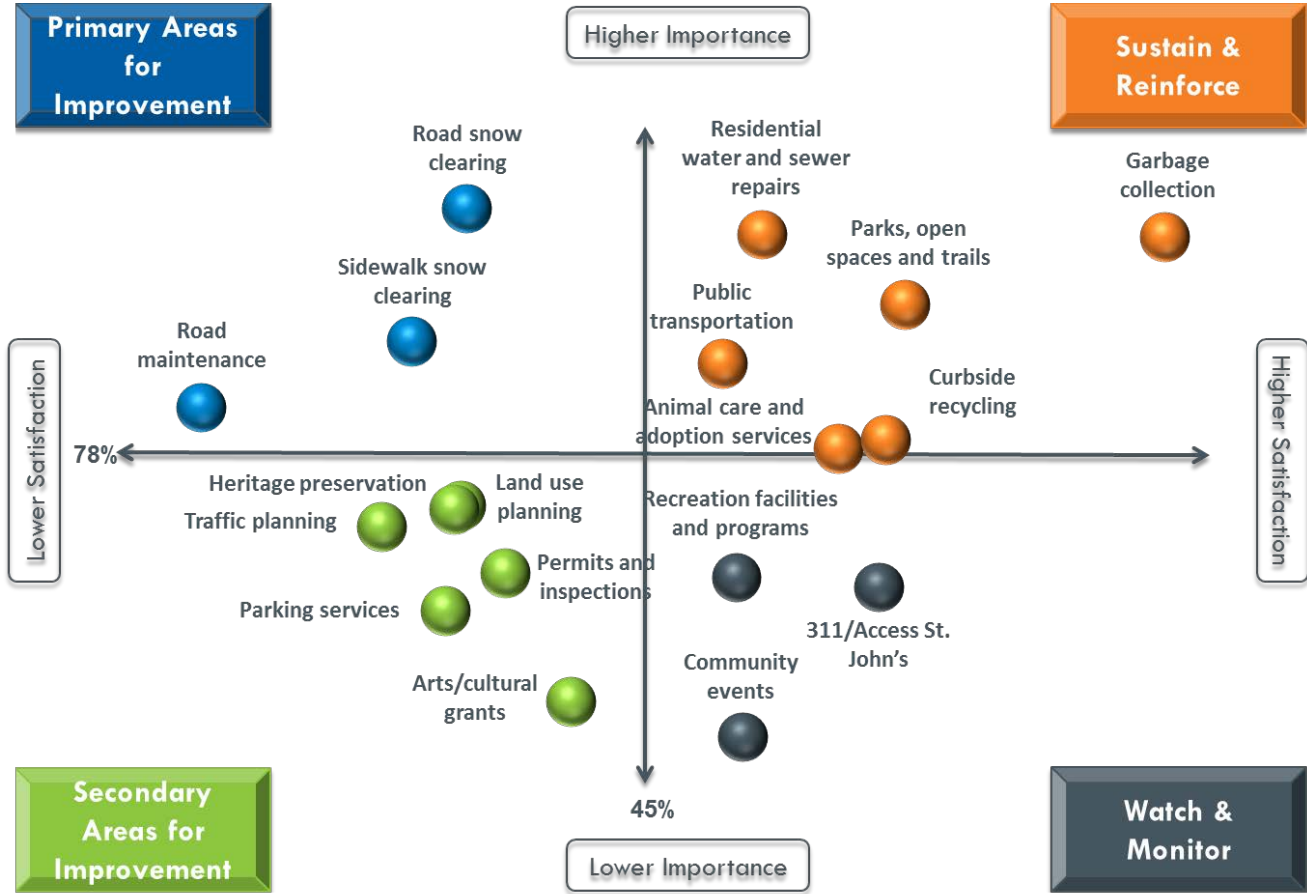
- Residential water and sewer repairs
- Public transportation
- Animal care and adoption services
- Curbside recycling
- Parks, open spaces and trails
- Garbage collection

**Secondary Areas for Improvement:**

- Traffic planning
- Heritage preservation
- Land use planning
- Permits and inspections
- Parking services
- Arts/cultural grants

**Watch and Maintain:**

- Recreation facilities and programs
- Community events
- 311/Access St. John's



# Action Grid – Ward 3

**Primary Areas for Improvement:**

- Road maintenance
- Road snow clearing
- Sidewalk snow clearing
- Traffic planning

**Sustain and Reinforce:**

- Residential water and sewer repairs
- Recreation facilities and programs
- Parks, open spaces and trails
- Garbage collection
- Curbside recycling

**Secondary Areas for Improvement:**

- Heritage preservation
- Land use planning
- Parking services
- Arts/cultural grants

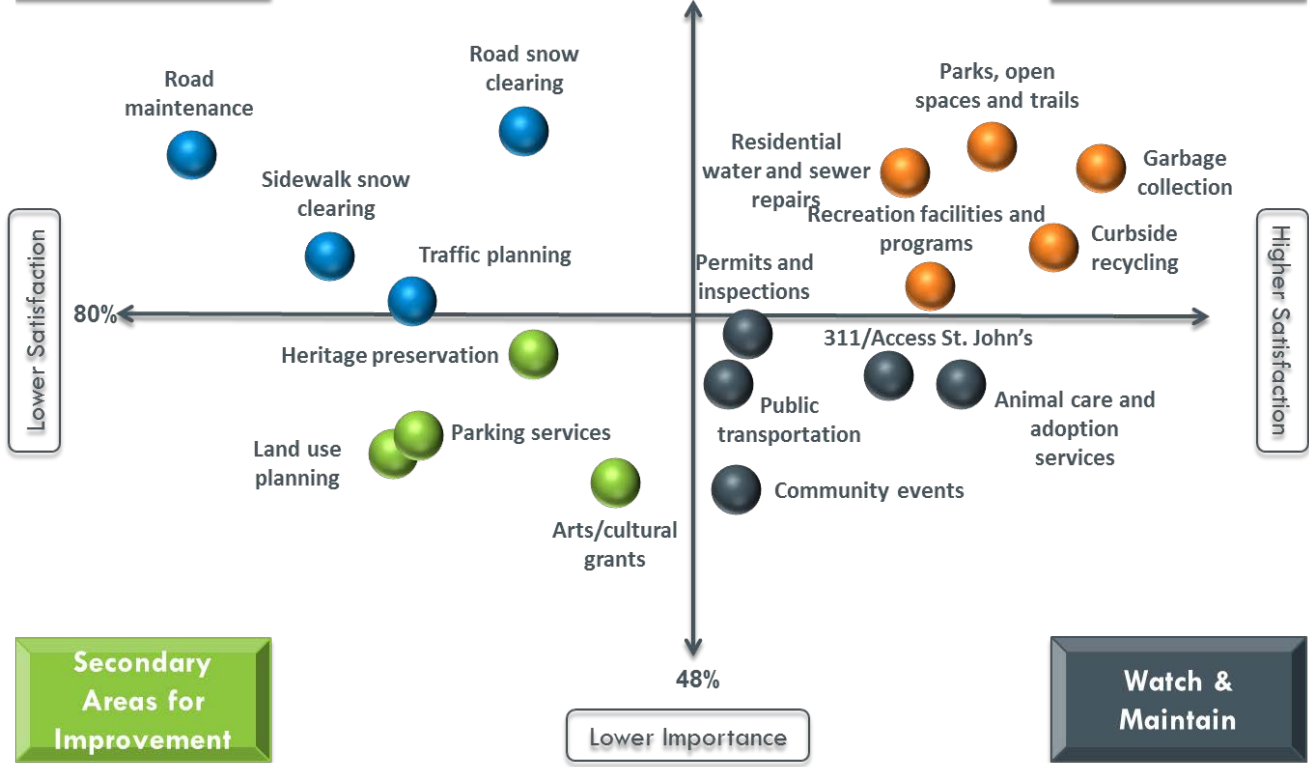
**Watch and Maintain:**

- Permits and inspections
- 311/Access St. John's
- Public transportation
- Community events
- Animal care and adoption services

**Primary Areas for Improvement**

Higher Importance

**Sustain & Reinforce**



**Secondary Areas for Improvement**

Lower Importance

**Watch & Maintain**

# Action Grid – Ward 4

**Primary Areas for Improvement:**

- Road maintenance
- Road snow clearing
- Traffic planning
- Public transportation

**Sustain and Reinforce:**

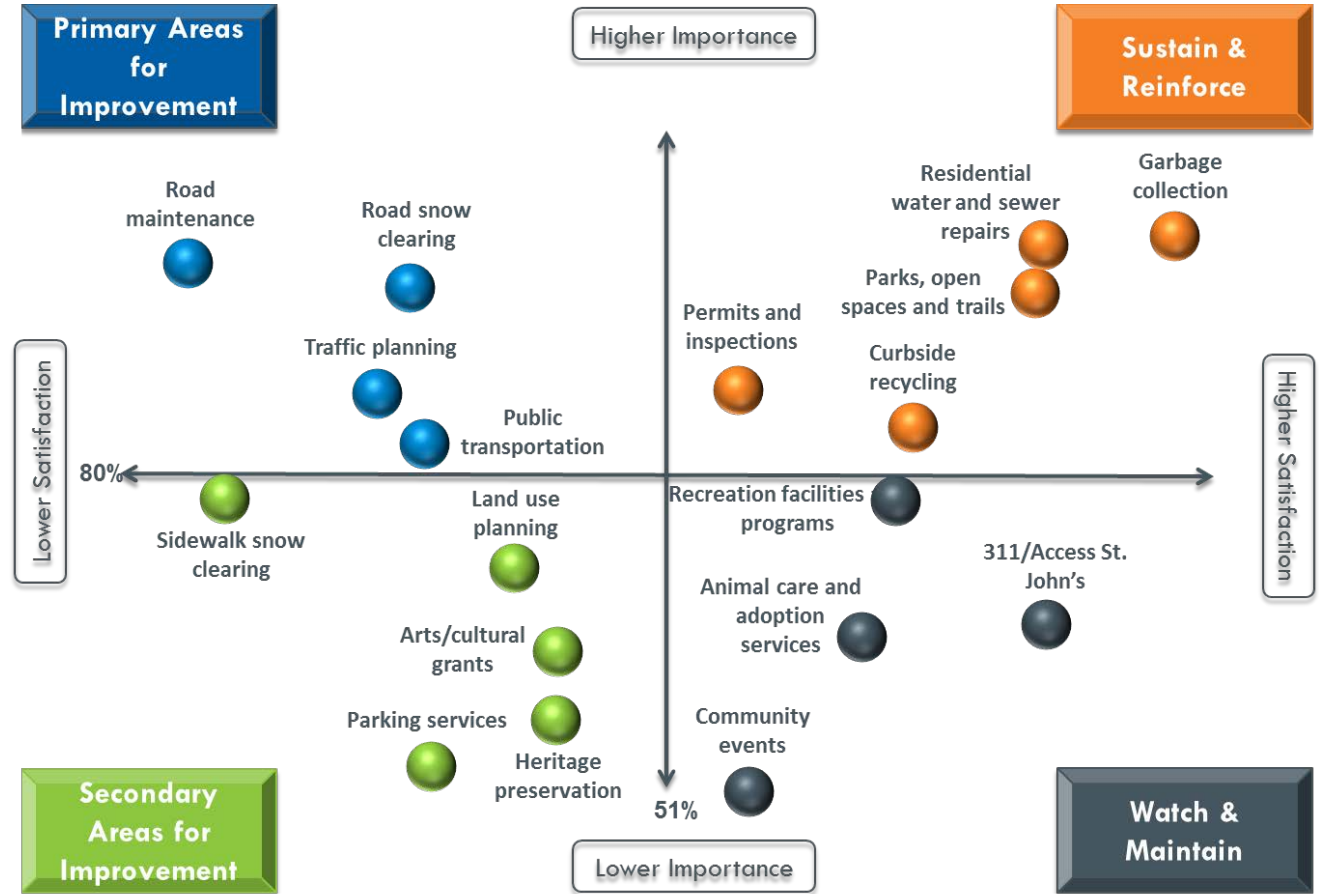
- Permits and inspections
- Curbside recycling
- Parks, open spaces and trails
- Residential water and sewer repairs
- Garbage collection

**Secondary Areas for Improvement:**

- Sidewalk snow clearing
- Land use planning
- Arts/cultural grants
- Parking services
- Heritage preservation

**Watch and Maintain:**

- Recreation facilities and programs
- Animal care and adoption services
- Community events
- 311/Access St. John's



# Action Grid – Ward 5

**Primary Areas for Improvement:**

- Road maintenance
- Road snow clearing
- Traffic planning

**Sustain and Reinforce:**

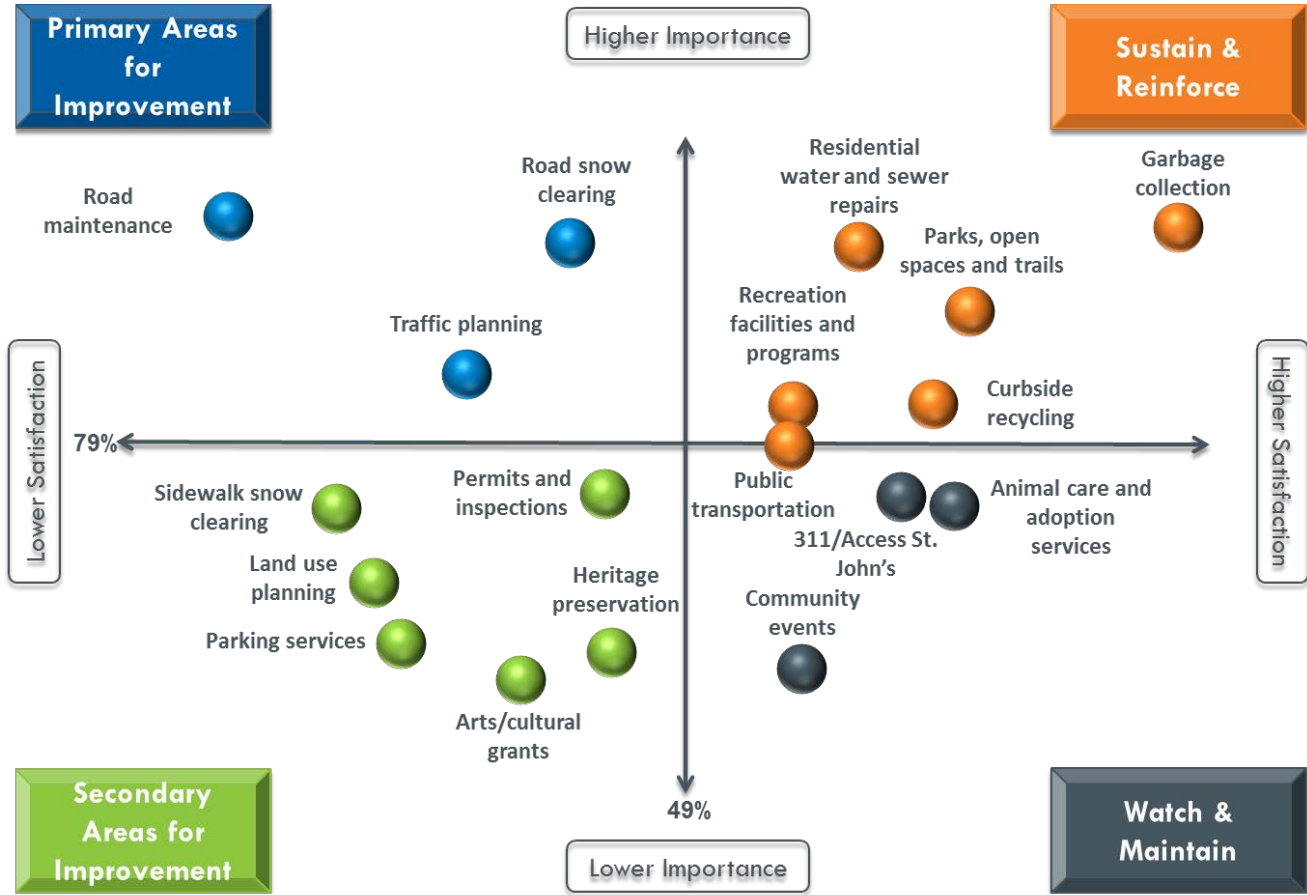
- Residential water and sewer repairs
- Recreation facilities and programs
- Public transportation
- Parks, open spaces and trails
- Curbside recycling
- Garbage collection

**Secondary Areas for Improvement:**

- Sidewalk snow clearing
- Land use planning
- Parking services
- Arts/cultural grants
- Heritage preservation
- Permits and inspections

**Watch and Maintain:**

- Animal care and adoption services
- 311/Access St. John's
- Community events



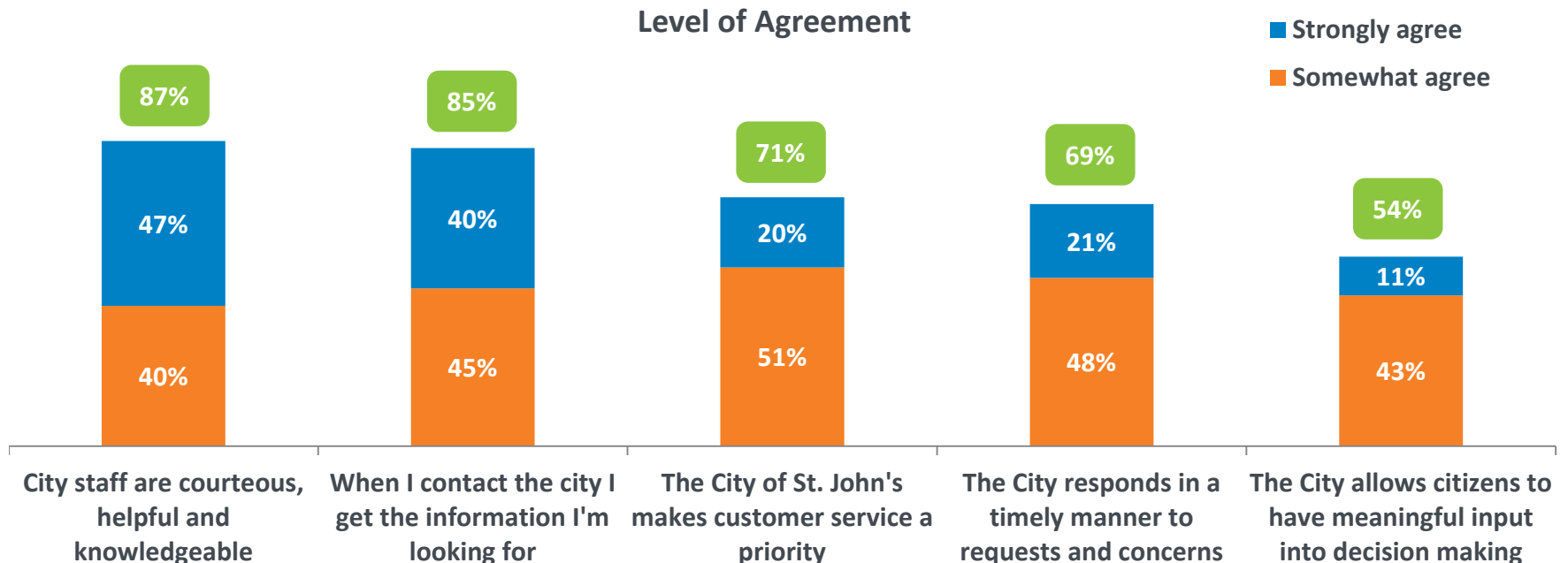
# Ward Comparisons

	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
Road maintenance	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement
Road snow clearing	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement
Sidewalk snow clearing	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement
Traffic planning	Primary Area for Improvement	Secondary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement	Primary Area for Improvement
Land use planning	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement
Parking services	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement
Public transportation services	Primary Area for Improvement	Sustain & Reinforce	Watch & Maintain	Primary Area for Improvement	Sustain & Reinforce
Heritage preservation	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement
Permits and inspections process	Secondary Area for Improvement	Secondary Area for Improvement	Watch & Maintain	Sustain & Reinforce	Secondary Area for Improvement
Residential water and sewer repairs	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce
Arts/cultural grants	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement	Secondary Area for Improvement
Parks, open spaces, and trails	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce
Recreation facilities and programs	Sustain & Reinforce	Watch & Maintain	Sustain & Reinforce	Watch & Maintain	Sustain & Reinforce
Curbside recycling	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce
Garbage collection	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce	Sustain & Reinforce
Animal care and adoption services	Watch & Maintain	Sustain & Reinforce	Watch & Maintain	Watch & Maintain	Watch & Maintain
Community events	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain
311/Access St. John's	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain

Section VI

# COMMUNICATION AND ENGAGEMENT

- Approximately one-half (48%) of residents surveyed had direct contact with the City over the past 12 months.
- Overall, City staff are effectively interacting with residents. The one area where the City was performing the weakest was in terms of allowing citizens to have meaningful input into decision making.

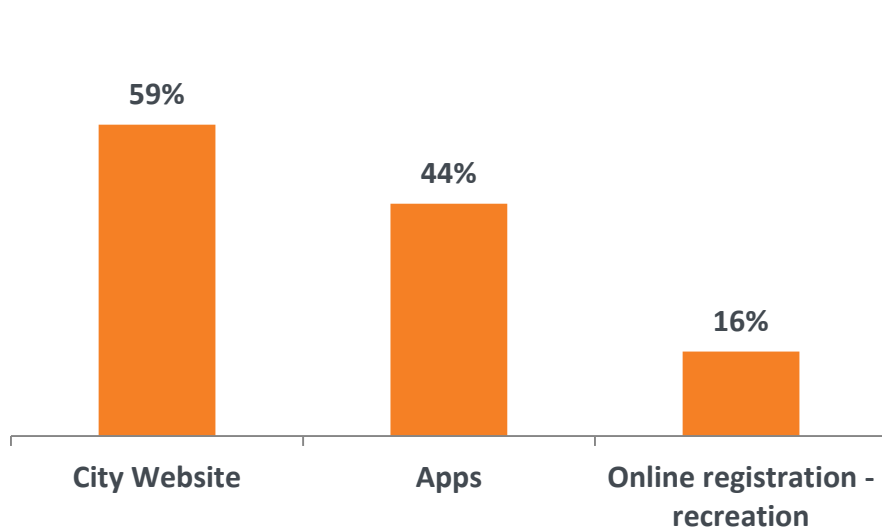


Q. Thinking about your personal dealings with the City of St. John's, to what extent do you agree or disagree with each of the following statements about the City?



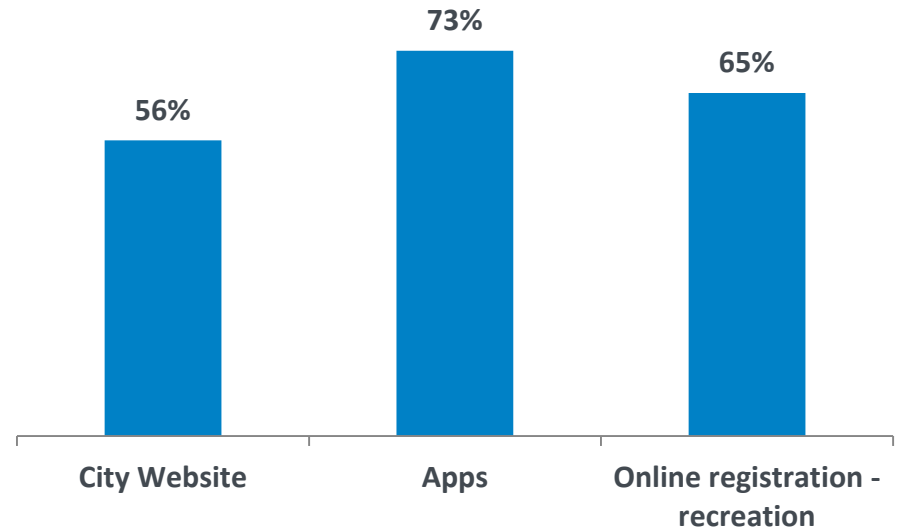
- Overall, six-in-ten (59%) had used the city's website while less than one-half (44%) had used the Curb it! or 311 apps and just 16% had used the RECconnect online registration service.
- Satisfaction with the City's online services ranged from a low of 56% (rating of 8 or higher) for the city's website to a high of 73% for the recycling and 311 apps.

**Usage of Online Services**  
% Used



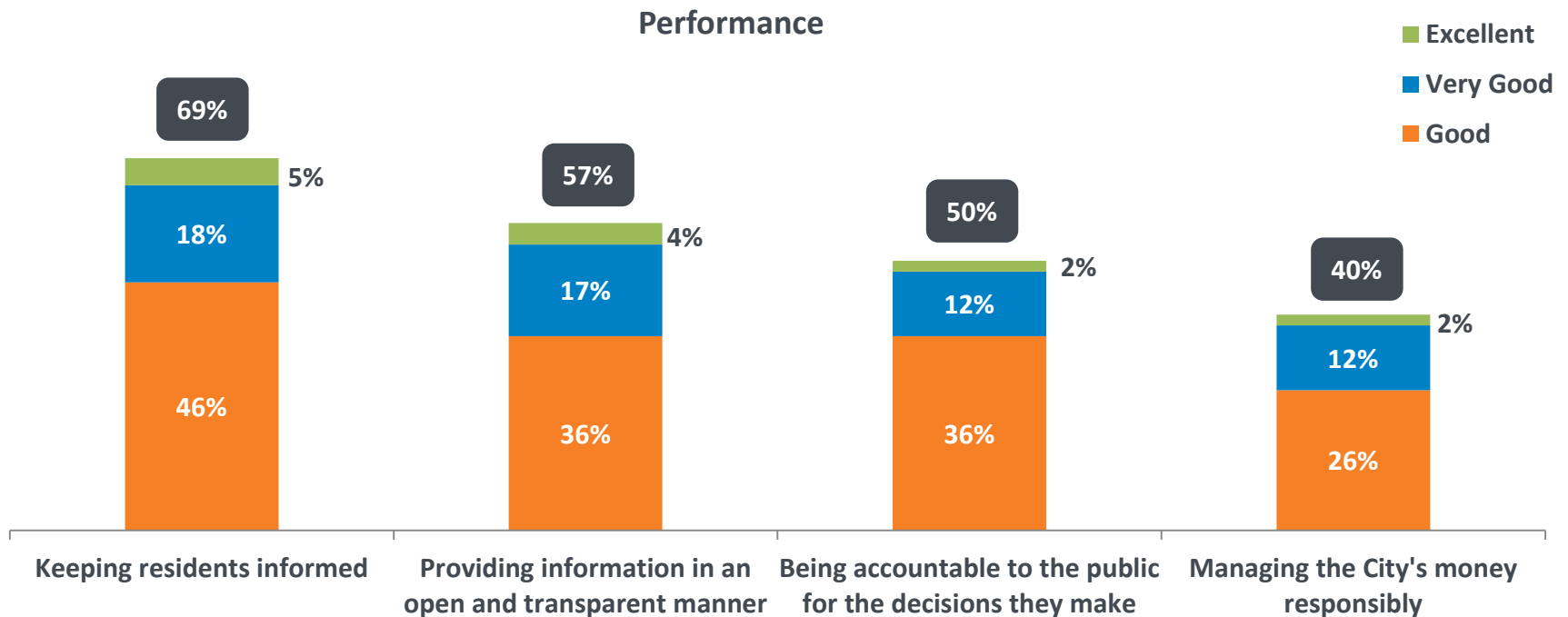
Q. Have you used <online service>?

**Satisfaction - % Rating 8 or higher**  
Subset: Among Those That Used Service



Q. How would you rate your overall level of satisfaction with <online service>?

- Residents were asked to rate the City on four measures of communications and accountability from Poor to Excellent.
- The City was rated highest in terms of keeping residents informed (69% indicating “Good”, Very Good” or “Excellent”). Managing the City’s money responsibly was the biggest area needing improvement.



Q. In your opinion, does the City of St. John’s do an excellent, very good, good, fair or poor job In terms of...?

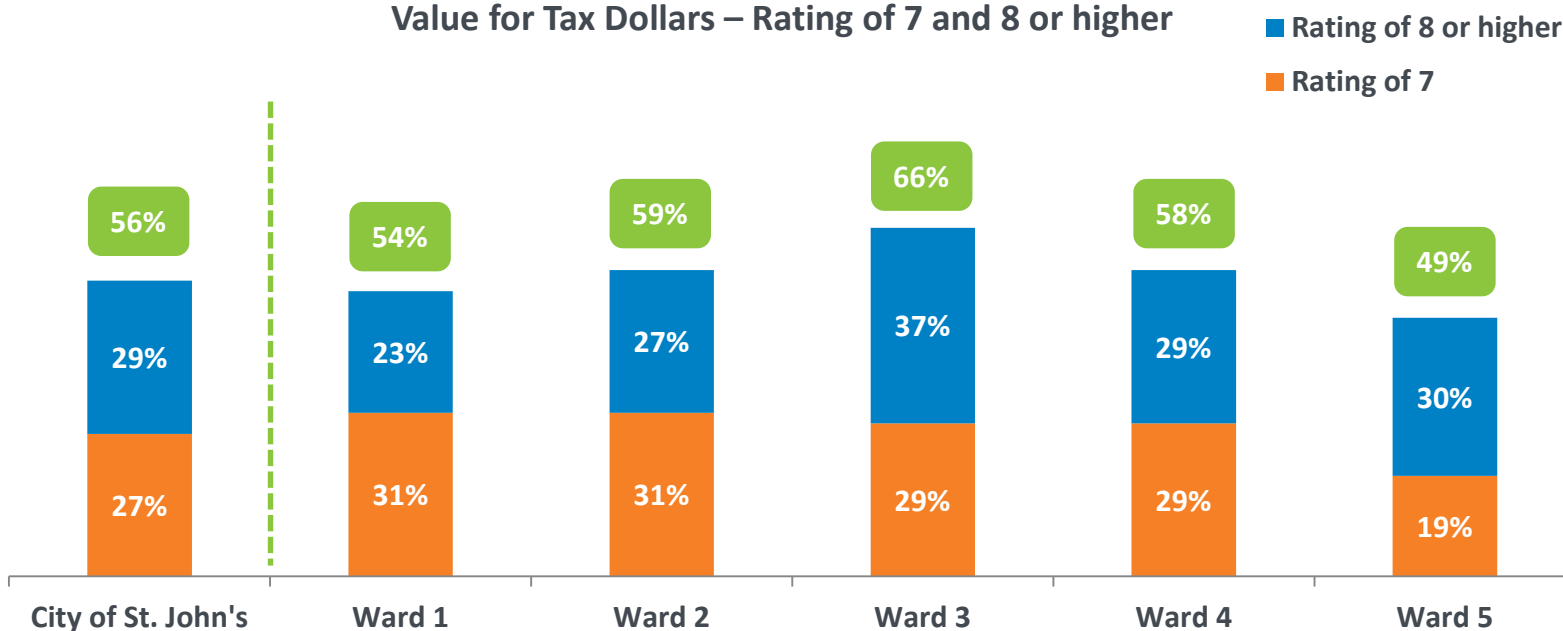
Section VII

# TAXATION AND CAPITAL SPENDING

# Value For Tax Dollars

- In terms of the perceived value residents receive for their tax dollars, less than one-third (29%) gave a rating of 8 or higher out of 10.
- There was also a significant group who gave a rating of 7 (27%) indicating this group sees some value but feel there is room for improvement.
- Looking at results by ward, the perceived value was highest among Ward 3 residents and lowest in Ward 1.

Value for Tax Dollars – Rating of 7 and 8 or higher

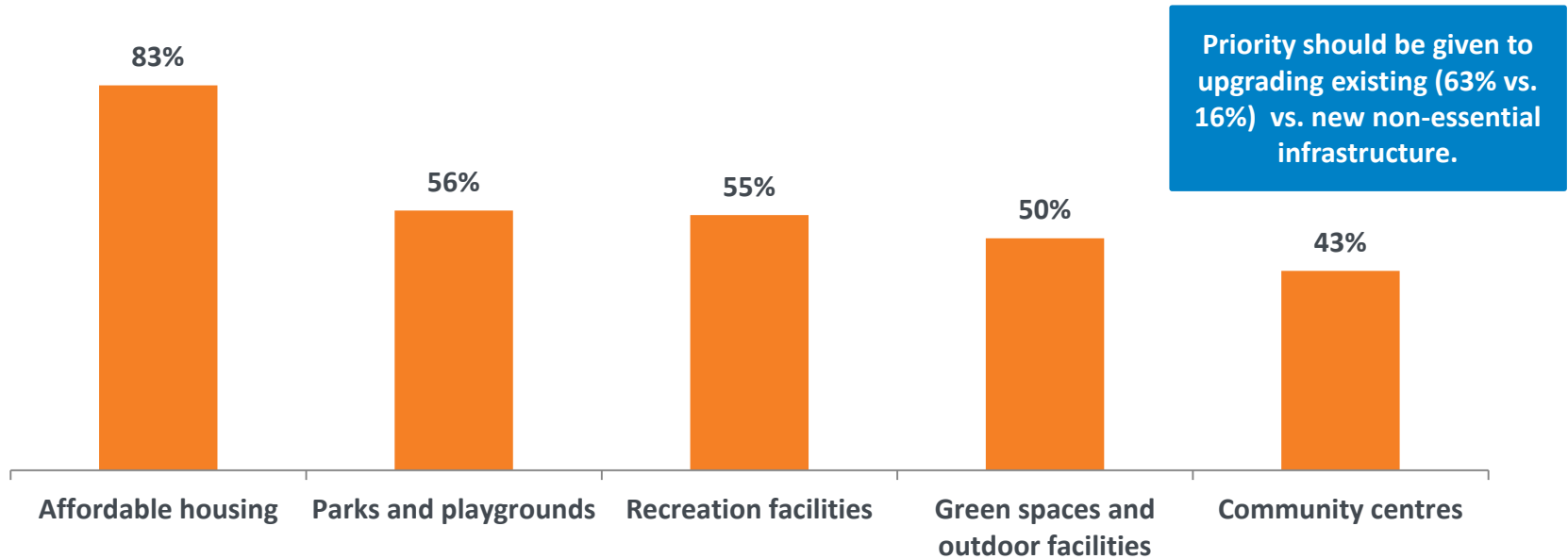


In general, citizens were mostly against any form of tax increase.

Q. Thinking about the programs and services you receive from the City of St. John's, how would you rate the overall value of what you receive for your tax dollars?

- When all mentions were combined (1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> priority), affordable housing was mentioned as one of the top three priorities for non-essential infrastructure by 83% of respondents.
- Significantly more residents felt the city should focus on upgrading (63%) existing non-essential infrastructure vs. building new (16%). 11% said both while 11% were unsure.

Top Priorities for Non-Essential Infrastructure (% Rating in the Top 3)

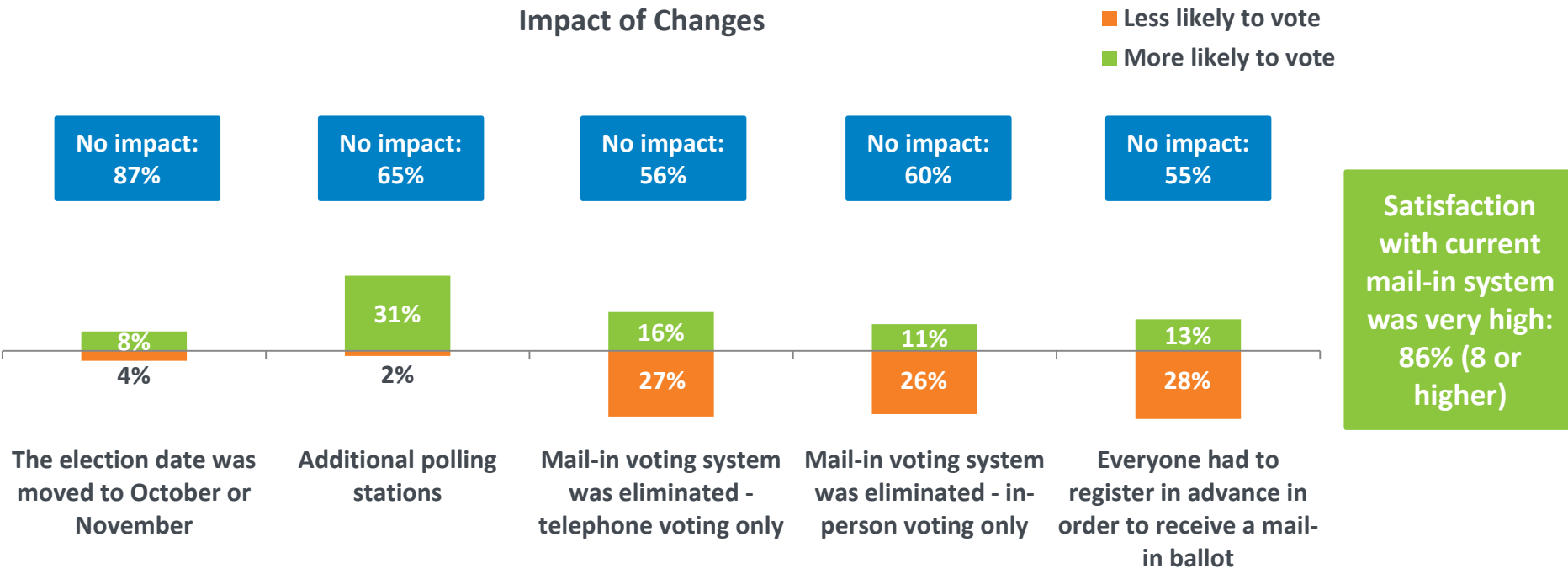


Q. When thinking of capital spending on non-essential infrastructure, which of the following should be the first priority? What should be the second priority? And the third?

Section VIII

# MUNICIPAL ELECTIONS

- Residents were provided with 5 scenarios for the next election and asked whether or not the change would make them more likely to vote, less likely, or have no impact.
- Additional polling stations was identified as the scenario that would have the biggest positive impact while eliminating the mail-in system or requiring residents to register were viewed as having the most negative impact.






Q. For each of the following scenarios, please indicate whether you would be more likely to vote, less likely to vote, or if it would have no impact on whether you would vote in the next municipal election.

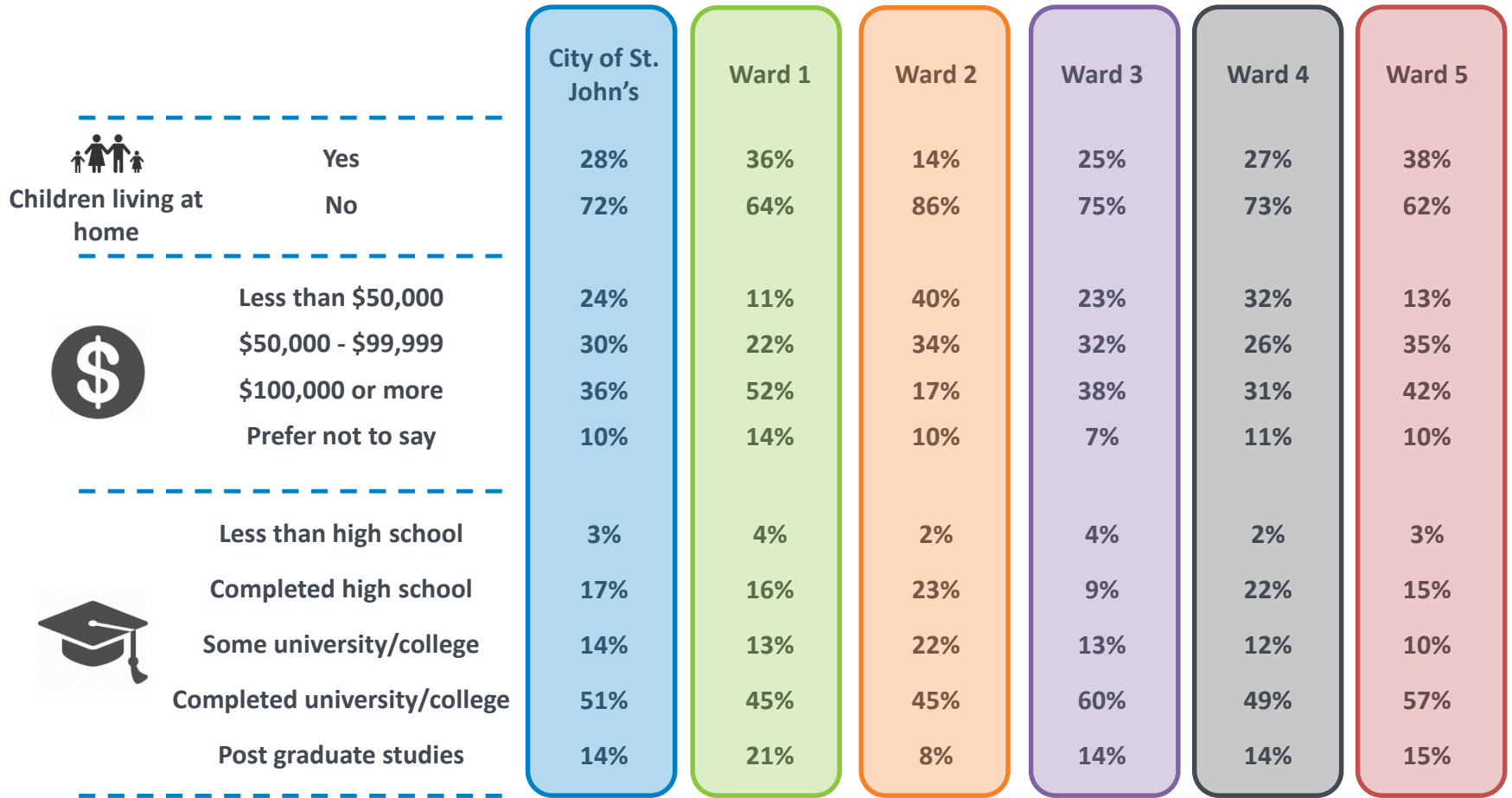
SECTION IX

# DEMOGRAPHIC PROFILE



# Demographic Profile

		City of St. John's	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
	Male	47%	38%	46%	54%	47%	52%
	Female	52%	62%	54%	46%	51%	48%
	Other/Prefer Not to Say	0%	0%	0%	0%	1%	0%
<b>Age</b>	18 to 34	31%	23%	24%	32%	46%	29%
	35 – 54	32%	34%	38%	27%	27%	37%
	55 plus	36%	43%	38%	41%	27%	34%
	Own	67%	81%	58%	67%	54%	78%
	Rent	29%	14%	39%	31%	44%	18%
 Length of time living in the city.	1 to 5 years	9%	5%	8%	12%	10%	12%
	6 to 10 years	13%	11%	15%	12%	16%	12%
	11 to 15 years	8%	9%	7%	5%	9%	11%
	16 to 20 years	9%	9%	14%	4%	7%	12%
	20 + years	60%	65%	56%	67%	58%	54%



Section X

# KEY DIFFERENCES BY SUB-GROUPS

## Gender

- Overall, results were fairly consistent between males and females.
- Females were more likely to rate the arts and cultural grants as more important and also tended to be more satisfied with Access St. John's and the Curb it! and 311 apps.

## Age

- Perceptions of the quality of life in St. John's as well as overall satisfaction with the programs and services provided by the City were directly linked to age with those 55 plus having the most positive views and those 18 to 34 being the most pessimistic.
- Those 35 to 54 (also the most likely to have children) were the most negative regarding the value they receive for their tax dollars.
- The youngest age group (18 to 34) are the least satisfied with public transportation in the City.

## Length of Time Living in the City

- Those who have been in the City the shortest amount of time (10 years or less) had a more negative view of their interactions with the City. They were less likely to find staff courteous or to be able to find the information they are looking for. They also were the least likely to say the City responds in a timely manner and makes customer service a priority.

## Home Ownership (67% own their home)

- Home owners were more positive about the quality of life in St. John's compared to renters. This was likely linked to age and income differences between the two groups.
- Renters were more likely to indicate that more polling stations would have an impact on their likelihood to vote. This is likely linked to the transient nature of this group (frequent change of address).

## Ward

- Ward 3 residents appear to be the most “satisfied” in general. They gave the highest ratings in terms of quality of life and perceived value for tax dollars, had the most contact with the city, and were the most likely to agree that the City makes customer service a priority. They were also among the most likely to vote.
- Ward 1 residents also rated their quality of life high and were among the most likely to vote similar to Ward 3. However, they did have some concerns with respect to being able to find the information they are looking for from the city and the city’s ability to respond in a timely manner. They also had the least amount of contact with the city and were significantly more pessimistic about the value they receive for their tax dollars compared to Ward 3.
- Residents of Ward 4 were the least satisfied with the programs and services provided by the City.

## Children Under 17 at Home (28% have kids under 17)

- Recreation programs and facilities was most important to residents with children under 17 and this group was the most likely to use the RECconnect (and were also the most satisfied with this online service).
- Those with children at home were also the most likely to name Affordable Housing as the top priority for non-essential infrastructure capital spending.

## Income

- The lowest income group (\$50,000) are the least engaged. They are the least likely to vote, least likely to use the website or apps, and the least likely to have interaction with the city in general.

## Education

- Those with a high school diploma or less, are the most satisfied with the programs and services offered by the City. However, this group is also the least engaged having the least interaction with the city, the least likely to use the website and are also the least likely to vote.
- However, despite the low engagement level, Access St. John's was perceived as more important to this group compared to the other income brackets.