

January 13th, 2020

2020 Citizen Survey Presentation to Council

ST. JOHN'S



BACKGROUND AND OBJECTIVES

Background

- In 2015, the City of St. John's rolled out its first strategic plan which was used to provide direction for council and the city's operations based on five core values.
- As council began 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 2018 survey provided a benchmark from which the City can measure any changes in priorities and provide ongoing performance measurement following the implementation of the 2019 Strategic Plan.
- The 2020 survey was used to measure any change in perceptions over time, and to evaluate the new strategic plan.

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 October 24th and November 15th, 2020.
- A total of 501 surveys were completed (298 landline / 203 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 using a stratified sampling approach. The margin of error for results at the ward level is ± 9.8 percentage points 19 times out of 20.
- The questionnaire was designed by MQO Research in consultation with the City of St. John's. The average survey length was approximately 21 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.

OVERALL QUALITY OF LIFE

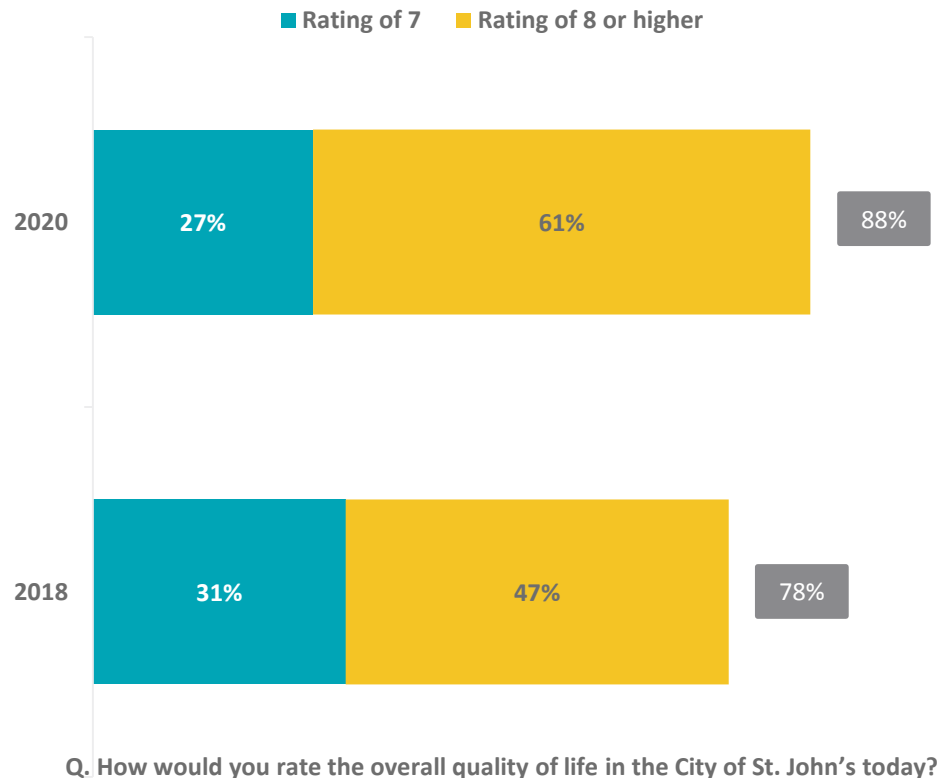
Perceptions of quality of life in St. John's have increased since 2018.

In 2020, 61% of residents rated their overall quality of life an 8 or higher on a 10-point scale while 88% gave a rating of 7 or higher. Significant increases in overall quality of life were seen across wards in 2020 which is encouraging.

Respondents were also asked to identify one change they'd like to see implemented that would improve their overall quality of life. Top mentions included:

- Better snow-clearing – 25%
- Better road maintenance/signage – 10%
- Improved transit infrastructure – 7%
- Lower taxes – 5%
- Improved sidewalks and walking trails – 5%

Quality of Life



OVERALL SATISFACTION

Satisfaction with city programs and services also increased significantly since 2018.

In 2020, 85% of residents rated their overall satisfaction with the programs and services provided by the City of St. John's a 7 or higher while 62% gave a rating of 8 or higher. Both measures were up significantly over 2018.

Residents who rated their overall satisfaction as 6 or less (15%; n=73) were asked to elaborate on why they gave a lower rating. Top mentions included:

Snow-clearing issues – 18%

General issues – 13%

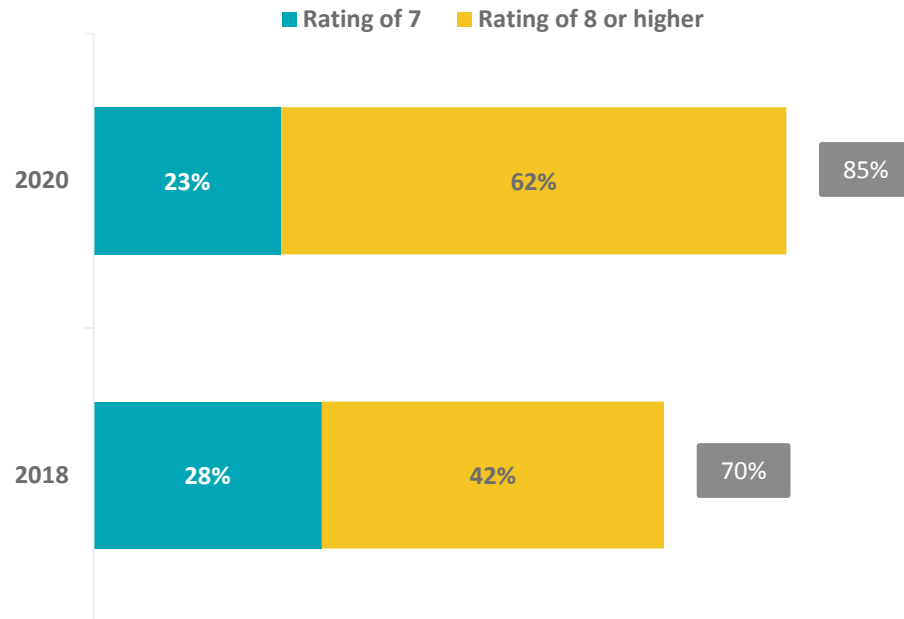
Lack of recreation programs and services – 12%

Poor public transportation – 9%

Parking issues – 6%

Garbage and recycling collection issues – 6%

Overall Satisfaction



It is important to note that in early 2020, the City of St. John's experienced significant snowfall. This context may have had an impact on participant's perspectives of the City's performance, especially when it comes to snow clearing.

PROGRAMS AND SERVICES

Overall importance of programs and services offered by the city held relatively steady in 2020.

The following table shows the perceived importance of each of the 20 service areas that were evaluated and the change over time.

While importance held steady for the most part, there was a significant increase in importance for the following programs and services:

1. 311/Access St. John's: +10 percentage points
2. Land use planning: + 7 percentage points
3. Sidewalk snow clearing: +6 percentage points
4. Heritage preservation: +5 percentage points
5. Recreation facilities etc.: +5 percentage points

Table 5: Importance	% 8 or higher		Change
	2018	2020	+/-
Road snow clearing	97%	97%	-
Garbage collection	97%	98%	+1
Residential water and sewer repairs	96%	97%	+1
Road maintenance	94%	93%	-1
Parks, open spaces, and trails	93%	93%	-
Curbside recycling	84%	87%	+3
Traffic planning	84%	84%	-
GoBus/Accessible taxi service*	-	82%	-
Sidewalk snow clearing	81%	87%	+6
Metrobus service*	80%	77%	-3
Recreation facilities/programs/activities	80%	85%	+5
Permits and inspections process	76%	77%	+1
Animal care and adoption services	73%	74%	+1
Land use planning	71%	78%	+7
311/Access St. John's	69%	79%	+10
Heritage preservation	68%	73%	+5
Yard waste collection	-	66%	-
Parking services	65%	62%	-3
Arts/cultural grants	62%	66%	+4
Community events	57%	59%	+2

* Public Transportation split into two areas in 2020

PROGRAMS AND SERVICES

Satisfaction was up significantly for several programs and services in 2020.

The following table shows the level of satisfaction with each of the 20 service areas that were evaluated and the change over time. Statistically significant increases were seen in several areas including:

1. Arts/cultural grants: 14 percentage points
2. Traffic planning: 13 percentage points
3. Land use planning: 13 percentage points
4. Road maintenance: 12 percentage points
5. Heritage reservation: 9 percentage points
6. Parking services: 9 percentage points
7. Road snow clearing: 8 percentage points
8. Water and sewer: 7 percentage points
9. Parks and open spaces: 6 percentage points
10. Permits and inspections: 6 percentage points

Table 6: Satisfaction	% 8 or higher		Change
	2018	2020	+/-
Garbage collection	86%	89%	+3
Parks, open spaces, and trails	72%	78%	+6
Curbside recycling	72%	72%	-
Residential water and sewer repairs	68%	75%	+7
311/Access St. John's	68%	70%	+2
Animal care and adoption services	65%	68%	+3
Recreation facilities/programs/activities	61%	62%	+1
Community events	55%	59%	+4
Metrobus service*	47%	43%	-4
Permits and inspections process	45%	51%	+6
Arts/cultural grants	38%	52%	+14
Road snow clearing	36%	44%	+8
Heritage preservation	36%	45%	+9
Traffic planning	29%	42%	+13
Land use planning	28%	41%	+13
Parking services	28%	37%	+9
Sidewalk snow clearing	20%	20%	-
Road maintenance	10%	22%	+12
GoBus/Accessible taxi service*	-	59%	-
Yard waste collection	-	62%	-

* Public Transportation split into two areas in 2020

GAP ANALYSIS

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 were no statistically significant gaps for yard waste collection and community events.

Notably, that the lowest rated area, community events, was still rated highly importance (8 or higher) by 60% of respondents.

Table 5: Importance	% 8 or higher		Difference
	Importance	Satisfaction	+/-
Road maintenance	93%	22%	-71
Sidewalk snow clearing	87%	20%	-67
Road snow clearing	97%	44%	-43
Traffic planning	84%	42%	-42
Land use planning	78%	41%	-37
Metrobus service*	77%	43%	-34
Heritage preservation	73%	45%	-28
Permits and inspections process	77%	51%	-26
Parking services	62%	37%	-25
GoBus/Accessible taxi service*	82%	59%	-23
Recreation facilities/programs/activities	85%	62%	-23
Residential water and sewer repairs	97%	75%	-22
Parks, open spaces, and trails	93%	78%	-15
Curbside recycling	87%	72%	-15
Arts/cultural grants	66%	52%	-14
311/Access St. John's	79%	70%	-9
Garbage collection	98%	89%	-9
Animal care and adoption services	74%	68%	-6
Yard waste collection	66%	62%	-4
Community events	59%	59%	-

* Public Transportation split into two areas in 2020

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
 GoBus/Accessible taxi

Secondary Areas for Improvement:
 Permits and inspections
 Land use planning
 Heritage preservation
 Parking services
 Arts/cultural grants
 Metrobus

Watch and Maintain:
 Animal care and adoption services
 311/Access St. John's
 Community events
 Yard waste collection

Primary Areas for Improvement

Lower Satisfaction

Secondary Areas for Improvement

Higher Importance

Sustain & Reinforce

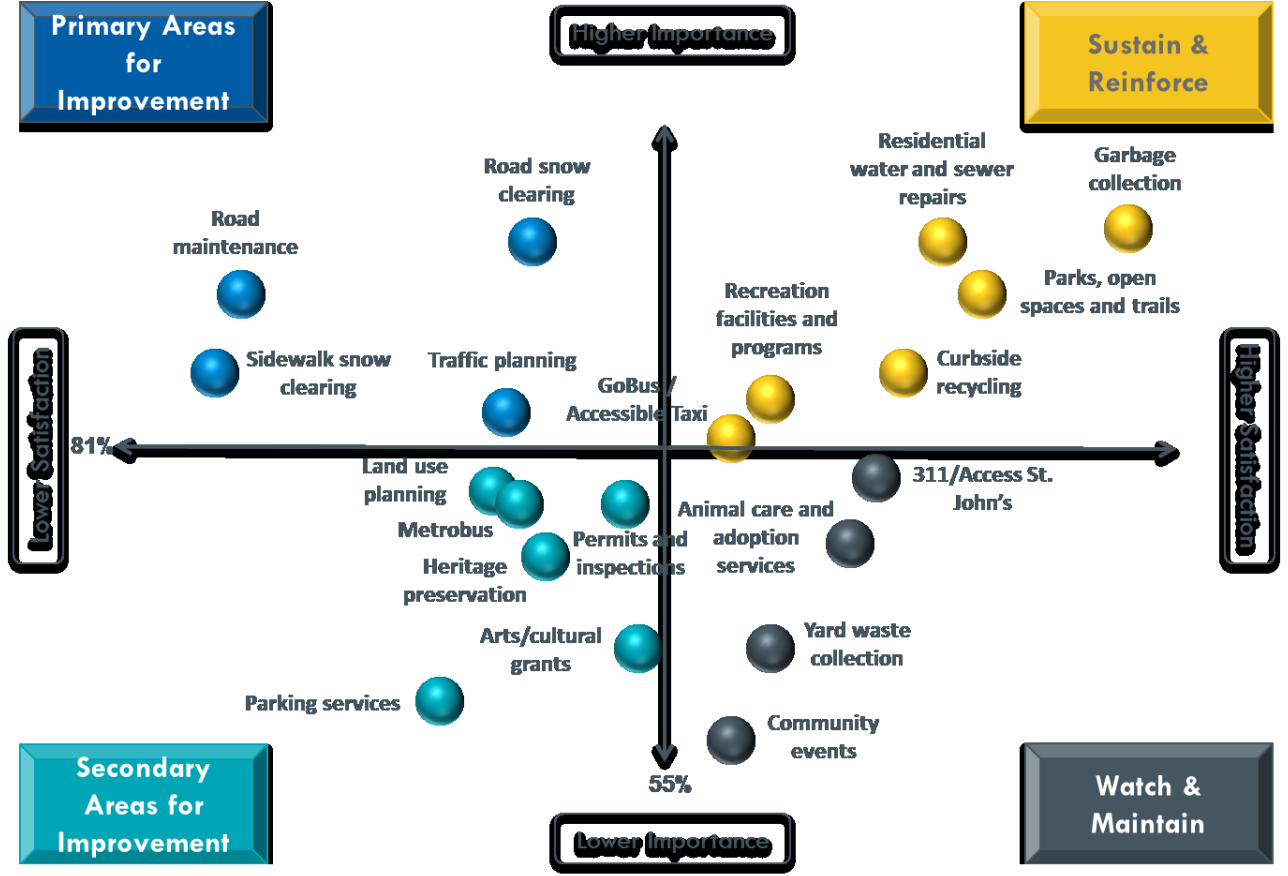
Higher Satisfaction

81%

55%

Lower Importance

Watch & Maintain



COMMUNICATION AND ACCOUNTABILITY

Significant improvements were seen on the measures of communications and accountability.

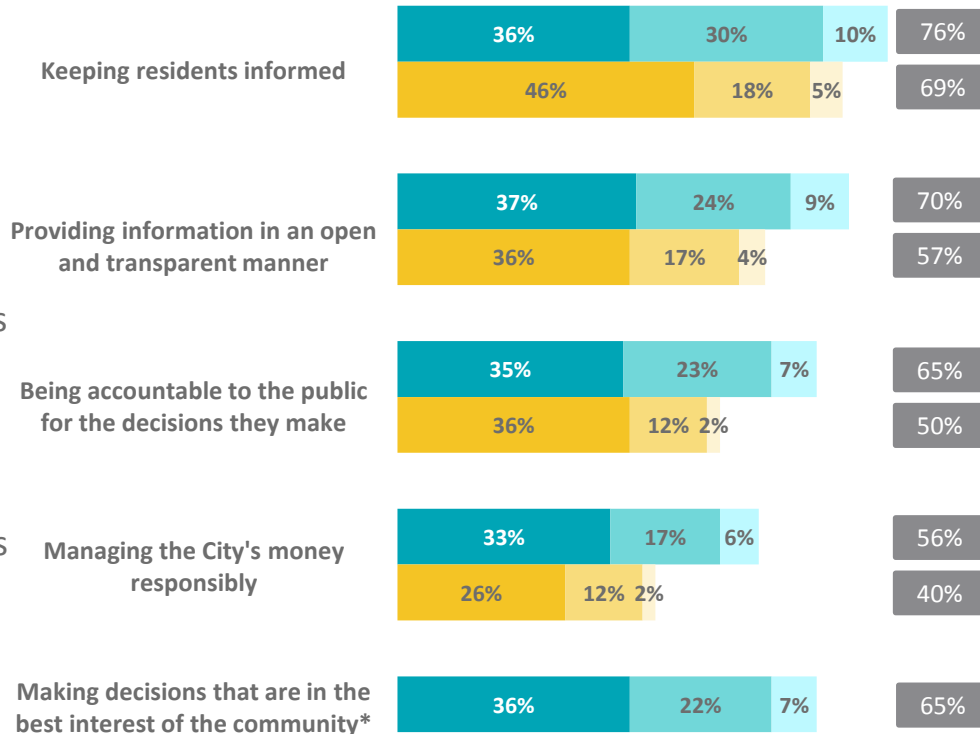
Residents were asked to rate the City on five measures of communications and accountability from poor to excellent (one new measure was added in 2020).

The City was rated highest in terms of keeping residents informed (76%) and lowest in terms of managing the City's money responsibly (56%).

Significant increases were seen in the percentage providing a rating of good, very good or excellent across all four measures from the 2018 survey, which is encouraging.

**Note: this statement was added in 2020's survey.*

% rating Good or higher



VALUE FOR TAX DOLLARS

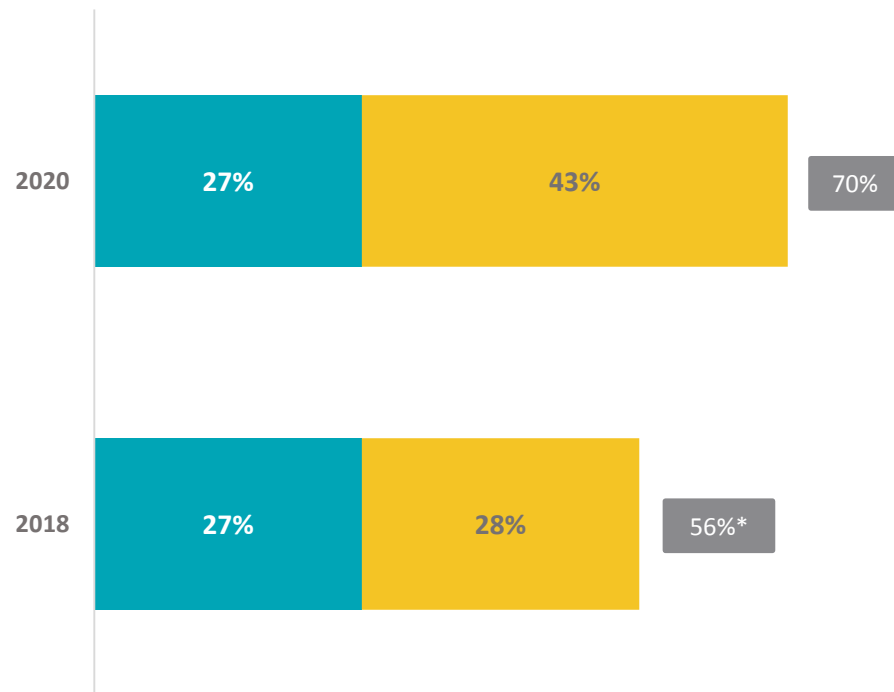
Consistent with the other key indicators, the perceived value for tax dollars increased markedly in 2020.

Overall, 70% of residents rated the overall value of what they receive for their tax dollars a 7 or higher; specifically, 43% gave a rating of 8 or higher and 27% gave a rating of 7.

This measure is up significantly from 2018, where overall value was rated at 56%, and only 28% gave a rating of 8 or higher.

Overall Value

■ Rating of 7 ■ Rating of 8 or higher



**Individual values may not add up to total due to rounding.*

CAPITAL SPENDING

There is significant support for capital spending on non-essential infrastructure.

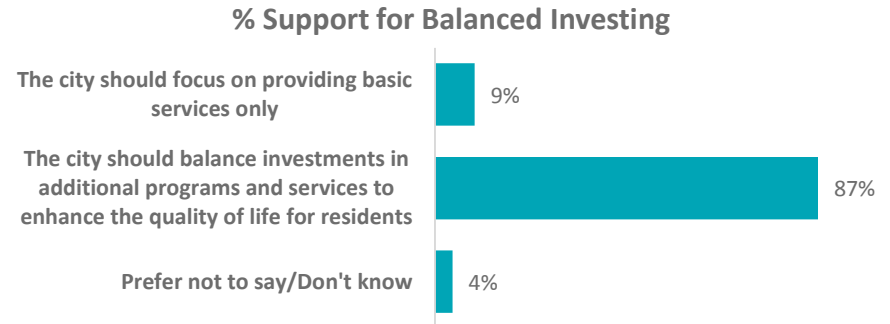
Residents were asked to rate their 1st, 2nd and 3rd priority for capital spending on non-essential infrastructure. Overall, city-owned and operated non-profit housing was the top ranked area.

Residents were also asked whether the City should focus on providing basic services only or balance investments in other areas to enhance the quality of life for residents.

A resounding 87% of residents support balancing investments.

Priority Area	Ranked Top 3	Ranked 1 st
City-owned and operated non-profit housing	61%	31%
Green initiatives	56%	22%
Green spaces and outdoor facilities	54%	14%
Recreation and community facilities	50%	13%
Parks and playgrounds	43%	10%
Cycling infrastructure (trails/bike racks)	21%	6%

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



Q. Which of the following statements best describes your view on how the city invests in basic services such as snow clearing, roads and garbage collection versus recreation and community facilities, green spaces and other quality of life programs and services?

STRATEGIC DIRECTIONS

There was strong support for the City's current strategic directions.

In 2020, residents were asked to rate the overall importance of the City's four key strategic directions.

Perceived importance (rating of 8 or higher) ranged from a high of 92% for Sustainability to a low of 77% for A Connected City.

Perceptions were relatively consistent across wards and demographic groups.



A Sustainable City

92%



An Effective City

87%



A City That Moves

78%



A Connected City

77%

Importance - % 8 or higher

Q. How would you rate the overall importance of each of the following strategic directions for the City of St. John's?

HOUSEHOLD FINANCES

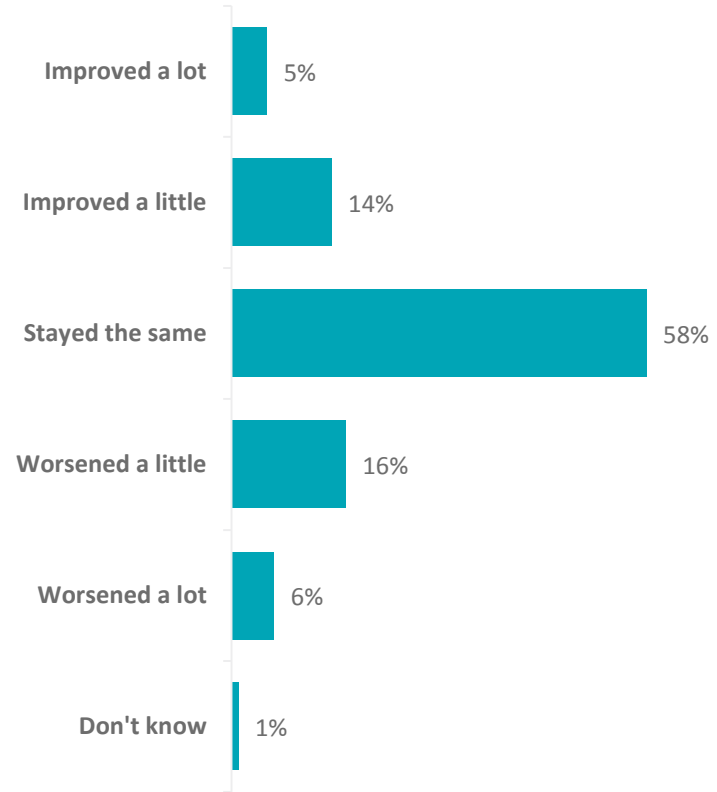
Many households have not seen any change to their household's financial situation in 2020.

A new question was added in 2020 to understand to what extent residents' household financial situations had changed compared to 2019.

Overall, 58% indicated their financial situation had stayed the same despite the impacts of the COVID-19 pandemic.

Meanwhile, 19% indicated things had improved (14% a little; 5% a lot) while 22% had seen their financial situation worsen (16% a little; 6% a lot).

Household Finances – Compared to 2019



Q. Compared to 2019, has your household's financial situation improved a lot, improved a little, worsened a little, worsened a lot or stayed the same?

COVID-19 IMPACT ON PERCEPTIONS

Residents were split on their opinions on the impact of the COVID-19 pandemic on perceptions.

Overall, 26% indicated the pandemic had a positive impact (6% very positive; 20% somewhat positive) on their perceptions of the quality of life in the City while 43% said the pandemic has had a negative impact (9% very negative; 34% somewhat negative).

One-quarter of residents (25%) indicated the pandemic had a positive impact on their overall satisfaction with the City's services (7% very positive; 18% somewhat positive). A similar proportion (23%) said the pandemic had a negative impact on their satisfaction with the City's services (5% very negative; 18% somewhat negative).

Impact on Perceptions of Quality of Life

Positive impact:
26%

No Impact/DK:
31%

Negative impact:
43%

Q. To what extent, if at all, has the COVID-19 pandemic impacted your perceptions of the quality of life in the City of St. John's?

Impact on Overall Satisfaction with City Services

Positive impact:
25%

No Impact/DK:
52%

Negative impact:
23%

Q. To what extent, if at all, has the COVID-19 pandemic impacted your overall satisfaction with the services provided by the City of St. John's?

CONCLUSIONS & IMPLICATIONS

- ✓ Overall, the City is performing well as evidenced by notable increases in satisfaction on key indicators in comparison to 2018. This suggests investments made by the City as part of the new strategic directions are paying dividends in the eyes of residents.
- ✓ Residents were also more satisfied this year with the City's ability to communicate and be accountable to St. John's residents. Ratings for all communication and accountability metrics increased compared to 2018 which speaks well for the performance of city staff.
- ✓ Most residents exhibited some level of trust in the City of St. John's. They also showed strong support for the City's key areas of strategic direction, and perceptions of elements related to the City's strategic directions were very positive.
- ✓ Residents of St. John's are mixed in their experiences of how the pandemic has impacted their lives.
- ✓ In light of the pandemic the City should ensure that programs and services are easily accessible to all residents (whether online or in-person), that the City is responsive to requests for assistance, and that City staff continue to positively interact with residents.
- ✓ When it comes to public spending, residents are concerned with key areas of infrastructure maintenance but are also supportive of capital spending on non-essential infrastructure. These should be areas of focus for investment moving forward; a well-rounded budget will ensure focus on a variety of key areas to improve quality of life for all City residents.