

Civic Satisfaction & Performance Survey 2018

Telephone and Online Panel



City of
Saskatoon

June/July 2018



FORUM
RESEARCH INC.

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PURPOSE

The City of Saskatoon commissioned a Civic Satisfaction & Performance survey, to gain insights on the City of Saskatoon's performance, as well as residents' experience/impressions related to quality of life, satisfaction, important issues, and the value of programs and services received.

The results of the survey are intended to identify trends, develop baseline performance data, inform decisions related to initiatives and actions for strategic priorities, budget decisions, and service delivery decisions related to communications, engagement and customer service.

Additionally, the survey will help identify key trends and issues of importance to aid the City's continuing goal of service excellence.

The primary objectives of the survey were to gauge the following:

- Perceptions of quality of life in Saskatoon and the direction the City of Saskatoon is heading;
- Perceptions of satisfaction;
- What citizens believe is the most important issue facing the City;
- Perceived value of civic services;
- Preferences for balancing the budget;
- Satisfaction and preference for receiving City information and communications;
- Experience and impression of community engagement;
- Preference, experience and impressions of customer service;
- Volunteering in the community;
- Performance indicators related to the strategic goals; and,
- Share ideas for creating efficiencies and savings.

EXECUTIVE SUMMARY

In 2018, the City of Saskatoon reviewed the Civic Services Survey and developed a more comprehensive two staged process to collect input from residents. Instead of one survey, the City of Saskatoon developed a Civic Satisfaction & Performance survey and a Civic Services & Spending Priorities Survey.

The Civic Satisfaction & Performance survey was implemented in June 2018. This year there were significant changes from previous years in the survey to improve the data, ask new questions, and be more inclusive by offering a link on the City of Saskatoon's website for the general public to participate.

The results of the telephone and online – panel responses are the subject of this report. The results from self-selected participants are provided in a separate report. There are some significant differences related to the telephone and online panel results as compared to self-selected participants. Specifically, the results of the telephone and online – panel are reliable and representative of the population due to the random selection process. The methodology and consistency of many questions also allows for trending and comparisons to previous years.

The sample size from the self-selected survey results were significant and therefore are considered reliable but are not representative of the population. It is worth noting that both online – panel and self-selected participants also tend to offer lower ratings on scale questions.

In 2018, changes were made to the some long standing questions in order to ensure respondents are not biased towards any answer options and to allow for respondents to select neutral options. A 10-point scale offers far more discrimination than the previous 4-point scale (very unsatisfied, unsatisfied, satisfied, and very satisfied). However, due to the changes in the scale, the neutral responses were removed to allow for comparable trending analysis. In the future, trending analysis will include the neutral option.

Consistent with previous years, 505 telephone and 801 online – panel residents of Saskatoon, 18 years of age and older, were surveyed. The results are highlighted in the following pages and provide insights on the City of Saskatoon's performance, residents' experience/impressions related to quality of life, satisfaction, important issues, and the value of programs and services received.

Please note that changes from previous years for telephone results within the margin of error of +/- 4.36% and online panel results within a +/-3.46% are not statistically significant. As a result, the information in the report will note that there was no change from the previous year.

Satisfaction/Quality of Life

This year a new question was added to the survey to measure satisfaction with living in Saskatoon. The vast majority of respondents (Telephone: 88%, Online – Panel: 85%) indicated that they are satisfied with living in the city.

The majority of respondents (Telephone: 85%, Online – Panel: 83%) indicated the quality of life in Saskatoon is good or very good. These results are comparable to 2017 (Telephone: 89%, Online – Panel: 85%).

A total of 75% of telephone and 66% of online respondents indicate the quality of life in Saskatoon has either improved or stayed the same over the past three years. The telephone results are similar to 2017. However, the results for online respondents declined since 2017 (-10%).

The majority (Telephone: 86%, Online – Panel: 77%) of respondents indicated they are satisfied with the quality of services provided by the City of Saskatoon (excluding neutral responses). The results from telephone respondents on the quality of services provided was consistent with the results from 2017, however, satisfaction with services decreased (-8%) amongst online respondents between 2017 and 2018.

Most Important Issues

When asked what is the single most important issue facing the City of Saskatoon, the most common responses for telephone respondents were:

- Road Construction (11%)
- Taxes (6%)
- Traffic (5%), Infrastructure (5%), Public Transit (5%)

Although Road Construction is still the single most important issue in 2018 for telephone respondents, it has steadily gone down each year since 2016 where it was cited by 32% of respondents.

Online respondents identified the following three areas most often when asked what the single most important issue facing the City of Saskatoon was:

- Public safety/crime/policing (17%)
- Taxes/too high (13%)
- Infrastructure (8%)

The most important issues around public safety/crime/policing and taxation levels remain similar to 2017.

Perceived Value and Budget

The majority of Telephone (89%) and Online – Panel (74%) respondents indicated that they receive very good or good value from services provided by the City of Saskatoon (excluding

neutral responses). Telephone respondents had a slight increase in perceived value when compared to 2017 (+5%). Results for online respondents are similar to the previous year.

About a third of respondents (Telephone: 35%, Online – Panel: 34%) prefer a combination of property tax and user fee increases in order to balance the City’s operating budget. These results are similar to 2017.

There was a significant increase for online respondents (+14%) who would prefer the option to stop providing a particular service when compared to 2017.

There was also a slight increase in the preference for telephone respondents who would prefer to increase property taxes (+6%), and those who prefer to reduce service levels (+5%). And, there was a slight increase in the number of online respondents who would prefer to introduce a new user fee (+5%).

Communications

About three-quarters (Telephone: 78%, Online – Panel: 73%), of respondents indicated they were satisfied with the quality of City communications. This has declined from the first year this question was asked (Telephone: -7%, Online – Panel: -15%)

Although citizens still prefer to use a mix of sources to receive information about the City of Saskatoon the most common preferences continue to be E-mail across all respondents (Telephone: 37%, Online – Panel: 49%), followed by Website (saskatoon.ca) (Telephone: 13%, Online – Panel: 44%) and Media (Telephone: 24%, Online – Panel: 39%).

Customer Service/Contact the City

Telephone was reported as the most preferred method that telephone respondents (72%) would use to contact the City of Saskatoon.

E-mail was reported as the most preferred (Online – Panel: 63%) method that online respondents would use to contact the City of Saskatoon.

The least preferred methods of contacting the City of Saskatoon are:

- Social media (Telephone: 7%, Online – Panel: 13%)
- Text message (Telephone: 9%, Online – Panel: 12%)

There was an increase in telephone respondents’ preferences towards Email (+6%), and Text message (+7%) when compared to 2017. There was a large increase in online respondents’ preferences towards Email (+17%) when compared to 2017.

- A total of 67% of telephone and 51% of online respondents agree/strongly agree that City staff provide consistent and reliable information.
- A total of 56% of telephone and 52% of online respondents agree/ strongly agree that City staff are easy to reach when needed.

- A total of 56% of telephone and 43% of online respondents agree/strongly agree that the City of Saskatoon makes customer service a priority.
- A total of 53% of telephone and 44% of online respondents agree/strongly agree that the City of Saskatoon is an open and transparent government.
- A total of 53% of telephone and 48% of online respondents agree/strongly agree that the City responds quickly to requests or concerns.

Community Engagement and Volunteering

Almost half (48%) of the online panel respondents indicated they volunteered in their community. However, there were fewer (31%) telephone respondents who indicated they volunteered in their community. There was a significant decrease in the number of telephone and online results who indicated they volunteer when compared to 2017 (Telephone: 56%, Online – Panel 66%) and 2016 (Telephone: 62%, Online – Panel: 64%). In regards to community engagement, 53% of telephone and 45% of online respondents feel the City of Saskatoon does enough to get public input on decisions it makes.

Strategic Goal Performance Indicators

In 2018, 9 additional questions were introduced, providing indicators of performance related to various strategic goals. The information is intended to provide a baseline in order to measure future progress.

Overall, the City of Saskatoon received favourable responses in the following areas:

- a) Providing a mix of recreation, sport, and cultural facilities year-round (Telephone: 92%, Online – Panel: 91%)
- b) Effectiveness of providing online services (Telephone: 91%, Online – Panel: 88%)
- c) Saskatoon is an inclusive and welcoming city to all (Telephone: 86%, Online – Panel: 73%)

The City of Saskatoon received average responses in the following areas:

- a) Feeling of Safety Living in the city (Telephone: 78%, Online – Panel: 67%)
- b) Preserving natural resources and protecting the environment (Telephone: 75%, Online – Panel: 62%)

There were mixed responses related to effectiveness of balancing growth throughout the city, approach to making downtown an appealing destination and an appealing place to live, and in the area of investing in a mix of transportation options for moving around.

Suggestions on Efficiencies and Savings

Respondents from the randomized telephone were directed to the City of Saskatoon website if they were interested in providing a suggestion on finding efficiencies or savings. The most common response for online panel participants was to reduce wasteful spending on unnecessary services (18%).

METHODOLOGY

Research was conducted via a live agent computer-assisted-telephone-interviewing (CATI) or computer assisted web interviewing (CAWI) methodologies amongst randomly selected residents of Saskatoon.

For telephone interviewing, numbers were generated from a phone list which includes Saskatoon landlines and cell phones to conduct a “pure random digital dial” from the combined list. Since more individuals do in fact have cell phones, or are a cell phone only household, it typically ends up that approximately 26% of respondents are from cell phones. As the number of cell phone numbers goes up and landlines go down, the random digital dialing should adjust for this factor.

2018 Changes to the Survey

In 2018, changes were made to the survey instrument in order to ensure respondents are not biased towards any answer options, to improve upon the answer options, and to allow for respondents to select neutral opinions. This included updating a 4-point scale to a 10-point scale, also updating a 4-point scale to a 5-point scale.

Moving to a ten-point scale

A 10-point scale offers far more discrimination than a 4-or 5-point scale and allows a respondent the ability to provide more nuance to their answer. Additionally, answering on a 10-point scale may be easier for a respondent because a 10-point scale is already likely to be a familiar construct to most.

Trending Analysis Q2 & Q4:

Due to the changes in answer options, the neutral responses have been removed to allow for a comparable scale for trending analysis. In the future, trending analysis will include the neutral option.

Implications of Survey Changes

Due to changes in the survey instrument, results from certain questions on past surveys are not directly comparable to 2018. However, these changes will improve future research and lead to better insight for the City of Saskatoon.

Fieldwork Dates	June 29 – July 29, 2018
Method	Computer Assisted Telephone Interviewing (CATI/Telephone), Computer Assisted Web Interviewing (CAWI/Online)
Criteria for Participation	Residents within the City of Saskatoon who are 18 years of age / older
Sample Size	1994 (505 CATI/Telephone, 801 CAWI – Panel/Online – Panel)
Average Length	11 minutes
Margin of Error	Telephone: ± 4.36%, 19 times out of 20 Online: ± 3.46%, 19 times out of 20

*Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%.

What is a “Top Box” and “Bottom Box” Score?

The top box score is a research wide accepted practice and is the best way to understanding satisfaction when using a 4- or 5-point scale. It is simply the net percentage of the highest categories on the rating scale. For example, if the scale is: Very Satisfied, Somewhat Satisfied, Somewhat Dissatisfied, and Very Dissatisfied, then the combined number of respondents who answered either ‘Very Satisfied’ or ‘Somewhat Satisfied’ would be reported as the top 2 box score. Conversely, the bottom box score is the net percentage of respondents of the lowest categories of the rating scale. Using the same example, the combined number of respondents who answer ‘Somewhat Dissatisfied’ or ‘Very Dissatisfied’ would be grouped together to represent the bottom box score.

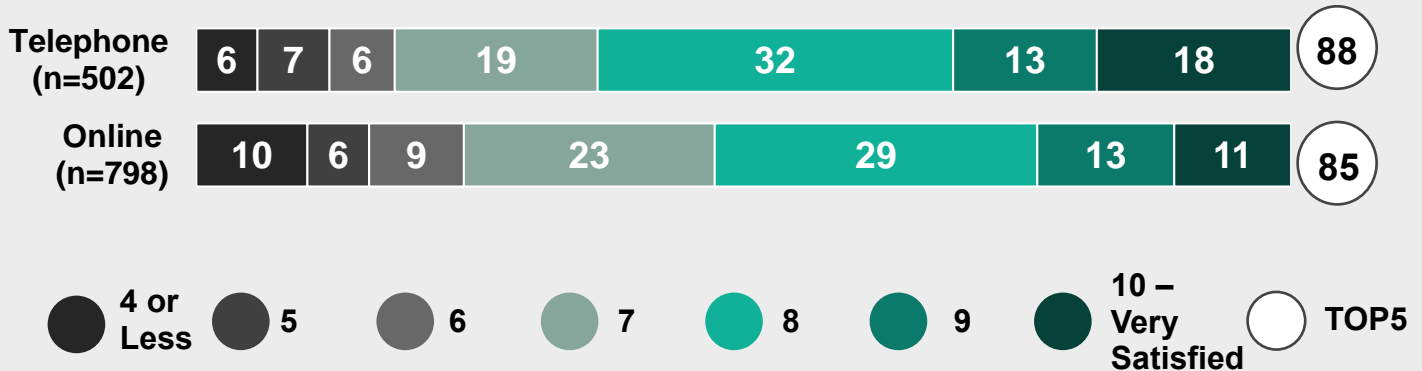
Online Sampling

For this online study, Forum Poll™ Online Panel Database was used. The panel has been built using Random-Digit Dialing (RDD) to recruit panelists – a purely random recruiting method that ensures sampling integrity. The panelists are then selected at random from the panel to complete surveys online, ensuring the accuracy of your online research results every time. The link to access the survey was used to access panel members who are Saskatoon residents. Additionally, the link was posted on the City of Saskatoon’s website. Therefore, the analysis of the data was segregated by the method, specifically the responses from the link on the City of Saskatoon website were labelled as “Self-Selected”, while the responses from panel members were labelled as “Online – Panel.” The “Self-Selected” responses are included in a separate report.

For consistency, only “Online – Panel” responses were compared to the 2017 Online responses.

DETAILED FINDINGS

Rating Satisfaction with Living in the City (%)



Q1a. Overall, how satisfied are you with living in the city of Saskatoon? Please use a number from 1 to 10, where 1 is not satisfied at all, and 10 is very satisfied.

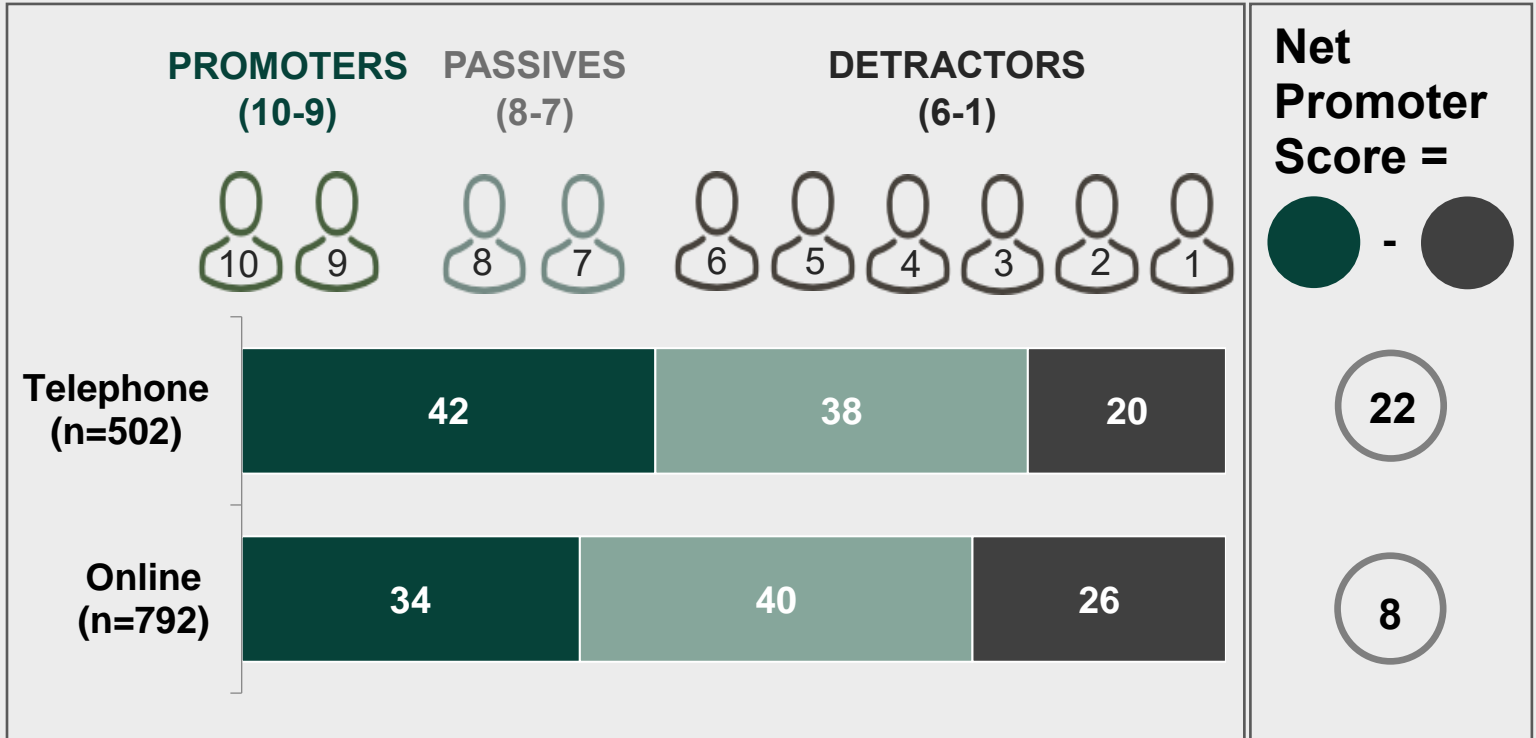
Sample size: Telephone n = 664, Online – Panel n = 798; excluding ‘Don’t know’ and ‘Prefer Not to Say’ responses

Sample framework: All

New this year, residents were asked to rate their satisfaction with living in the city of Saskatoon using a scale of 1 (Not at all satisfied) to 10 (Very satisfied). TOP indicates a satisfied rating between 6-10.

The vast majority of respondents (Telephone: 88%, Online – Panel: 85%,) indicated that they are satisfied with living in the city.

Recommendation on a Scale of 1 (Not at all likely) to 10 (extremely likely) (%)



Q1b. How likely would you be to recommend Saskatoon as a place to live to a friend or colleague?

Sample size: Telephone n = 502, Online n = 792; excluding 'Don't know' and 'Prefer Not to Say'

Sample framework: All

A Net Promoter Score (NPS) assesses loyalty.

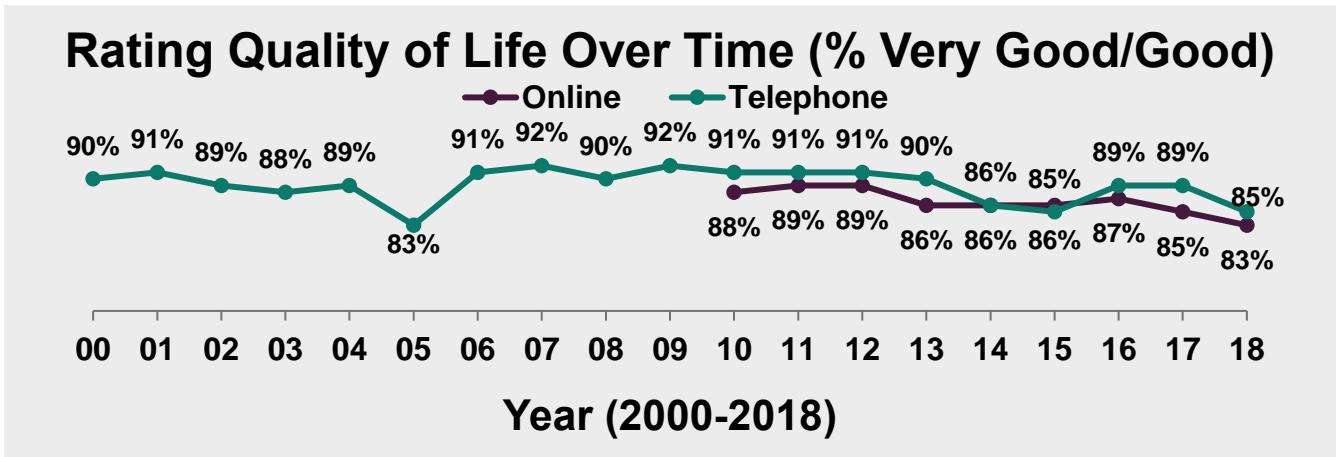
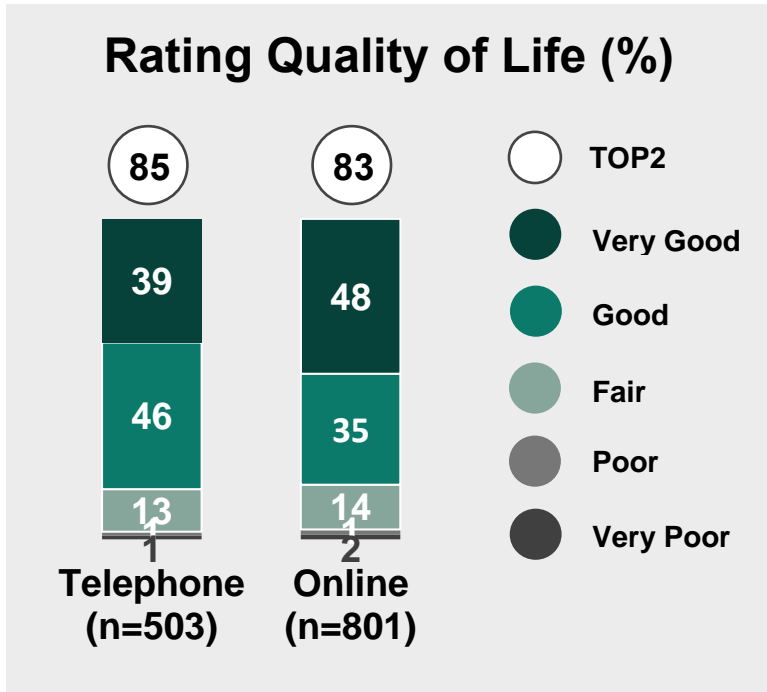
The NPS was measured by asking citizens to rate their likelihood of recommending Saskatoon as a place to live, on a scale from 1 to 10, with 1 being not at all likely and 10 being very likely. Based on the score provided, residents were classified as Promoters, Passives or Detractors of the city of Saskatoon.

- Respondents that rated the city as 9 or 10 are considered promoters, and are likely to speak positively about Saskatoon if asked.
- Respondents that rated the city as 7 or 8 are considered passives. They aren't unsatisfied, but nor are they satisfied. They are comfortable and would not be as likely to promote the city as Promoters, but nor are they expected to actively speak ill of Saskatoon, either.

- Respondents that rated the city as 6 or below are considered detractors, and are expected to be much less likely to speak favourably about Saskatoon, and much more likely to speak ill of the city.

NPS is calculated by subtracting the detractors from the promoters, which provides a net score of the proportion of citizens promoting Saskatoon.

- 3-in-10 online respondents (34%) and 4-in-10 telephone respondents (42%) are likely to recommend Saskatoon as a place to live to a friend or colleague; and
- about one quarter of the online respondents (26%) and one fifth of the telephone respondents (20%) are Detractors.
- The overall Net Promoter Score for Saskatoon is 8 for online and 22 for telephone.



Q1c. How would you rate the quality of life in Saskatoon?

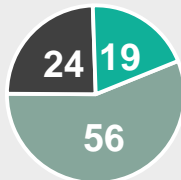
Sample size: Telephone n = 503, Online - Panel n = 801; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

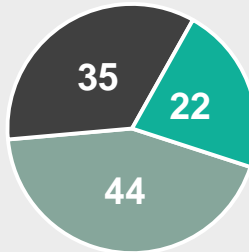
The majority of respondents (Telephone: 85%, Online – Panel: 83%) indicated the quality of life in Saskatoon is good or very good. When accounting for the margin of error, the number of online and telephone respondents who indicated quality of life as good/very good is not considered significantly significant and are therefore similar to the 2017 results.

Opinion of Change in Quality of Life Over the Past Three Years (%)

Telephone
(n=484)



Online
(n=773)



Better/Stayed the Same		
	Telephone	Online
2016	76%	80%
2017	78%	76%
2018	75%	66%

Gotten
Worse

Stayed
the Same

Gotten
Better

Q1d. In your opinion, over the past three years, has the quality of life in Saskatoon...

Sample size: Telephone $n = 484$, Online - Panel $n = 773$; excluding 'Don't know' and 'Prefer Not to Say' responses

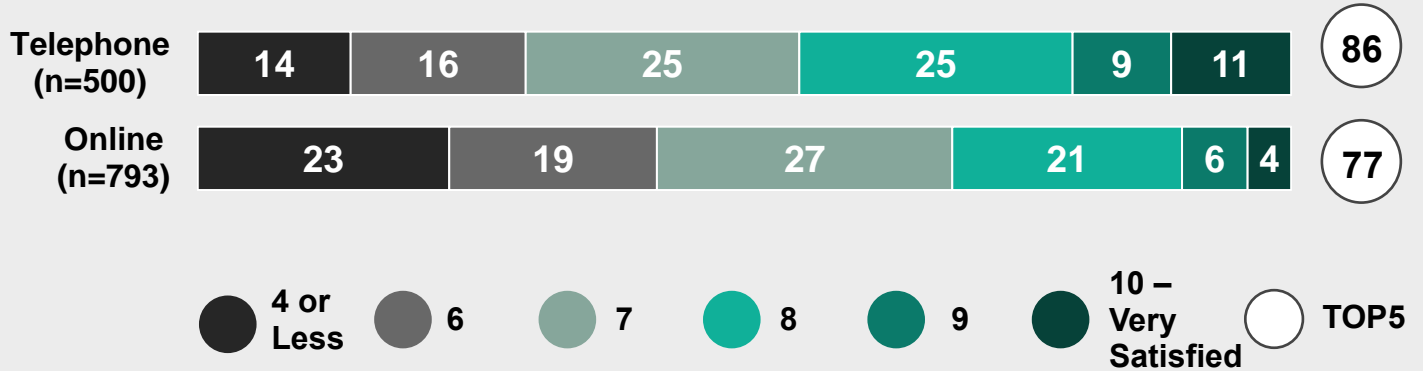
Sample framework: All

A total of 75% of telephone and 66% of online respondents indicate the quality of life in Saskatoon has either improved or stayed the same over the past three years. The telephone results are similar to 2017. However, the results for online respondents declined by 10% since 2017.

The majority of respondents (Telephone: 56%, Online – Panel: 44%) indicated the quality of life in Saskatoon has stayed about the same over the past three years. A fifth of both telephone (20%) and online (21%) respondents indicated that quality of life in Saskatoon has gotten better.

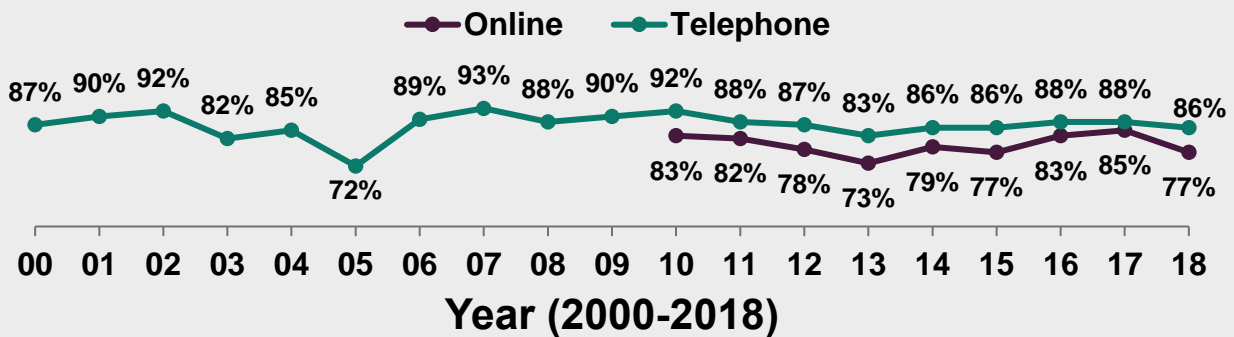
Contrarily, respondents from both telephone and online indicated that the quality in life in Saskatoon has become worse over the past three years with a quarter of telephone (24%) and a third (35%) of online respondents saying that quality of life had gotten worse.

Rating Satisfaction with Services Provided by the City (%)



In 2018, changes were made to the survey instrument in order to ensure respondents are not biased towards any answer options and to allow for respondents to select neutral options. A 10-point scale offers far more discrimination than the previous 4-point scale (very unsatisfied, unsatisfied, satisfied, and very satisfied). Due to the changes in the scale, the neutral responses have been removed to allow for comparable trending analysis. In the future, trending analysis will include the neutral option. Refer to Appendix A for more information and related to alternative ways to trend the data results.

Rating Satisfaction with Services Over Time (%Very Satisfied/Satisfied) *Neutral Option Removed



Q2. Overall, how satisfied are you the quality of the services provided by the City of Saskatoon?

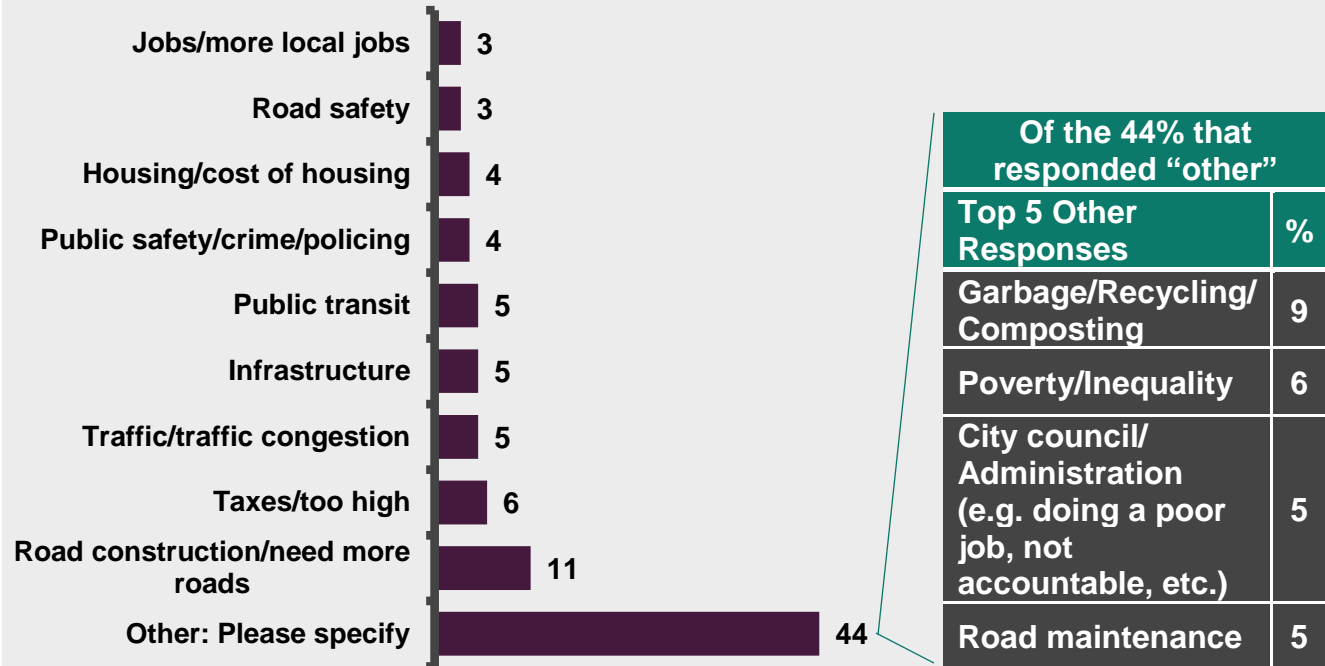
Sample size: Telephone $n = 500$, Online - Panel $n = 793$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All data is unweighted to ensure accurate historical trending*[2018: TOP = 6-10, (neutral option removed: Telephone $n = 54$, Online $n = 109$) from 2018 to make the scale comparable]

The majority (Telephone: 86%, Online – Panel: 77%) of respondents indicated they are satisfied with the quality of services provided by the City of Saskatoon.

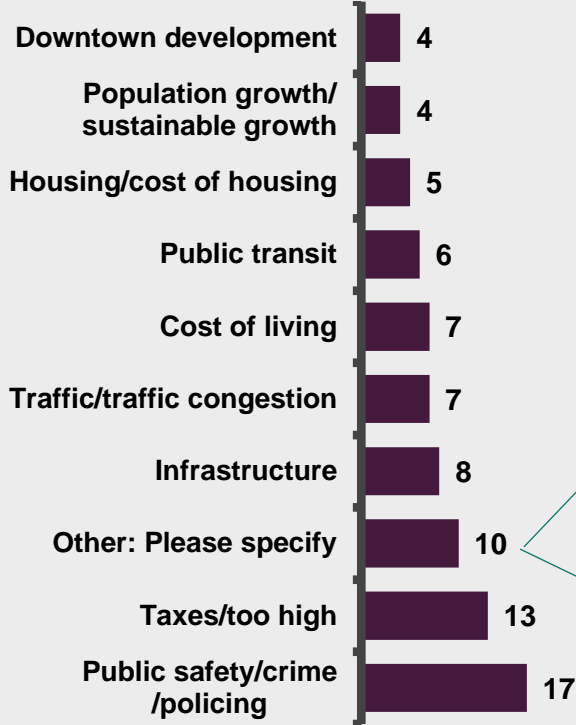
The responses from telephone respondents on the quality of services provided was consistent with the results from 2017, however, satisfaction with services for online respondents decreased slightly (-8%) from 2017.

Most Important Issues Facing the City (%) – Telephone



Although Road Construction is still the single most important issue in 2018 for telephone respondents, it has steadily gone down each year since 2016 where it was cited by 32% of respondents.

Most Important Issues Facing the City (%) – Online



Of the 10% that responded "other"	
Top 5 Other Responses	%
Road maintenance	8
Active transportation (e.g. bike lanes, trails, etc.)	8
Wasteful spending	8
Garbage/Recycling/Composting	7
Poverty/Inequality	7

Q3. In your opinion, what is the single most important issue facing the City of Saskatoon? That is, the one issue you feel should receive the greatest attention?

Sample size: Telephone $n = 479$, Online - Panel $n = 792$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

**Only top 10 answers shown*

Telephone respondents identified the following three areas most often when asked what the city of Saskatoon's single most important issue was:

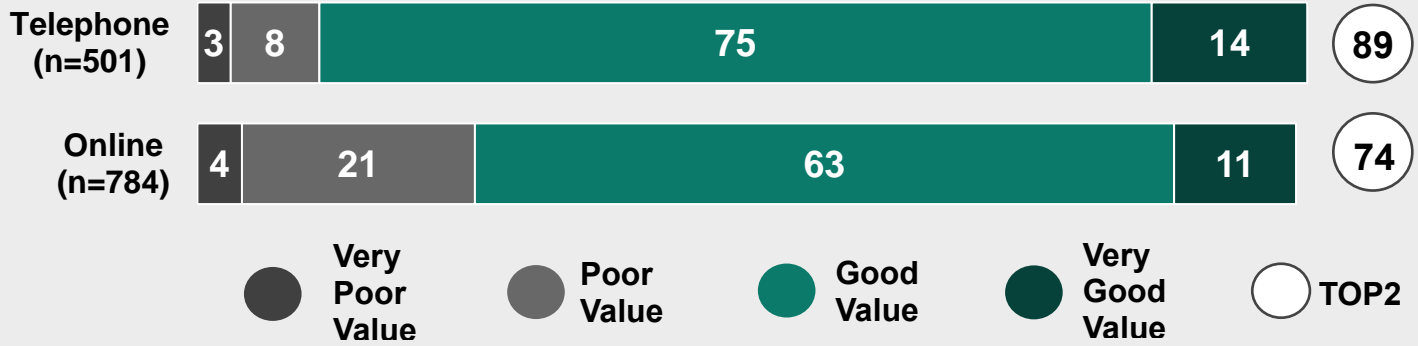
- Road Construction (11%)
- Taxes (6%)
- Traffic (5%), Infrastructure (5%), Public Transit (5%)

Online respondents identified the following three areas most often when asked what the city of Saskatoon's single most important issue was:

- Public safety/crime/policing (17%)
- Taxes/too high (13%)
- Infrastructure (8%)

The most important issues around public safety/crime/policing and taxation levels remain similar to 2017.

Rating Value of Services Provided by the City (%)



Q4. Thinking about the services provided to you by the City of Saskatoon, what value, if any, do you receive from these services? *Question was modified from 2016 to remove any potential bias. Note: the question was not asked from 2015 to 2016

Sample size: Telephone $n = 501$, Online - Panel $n = 784$; neither good value nor poor value" responses were removed (Online: $n = 227$, Telephone $n = 104$) from 2018 to make the scale comparable.

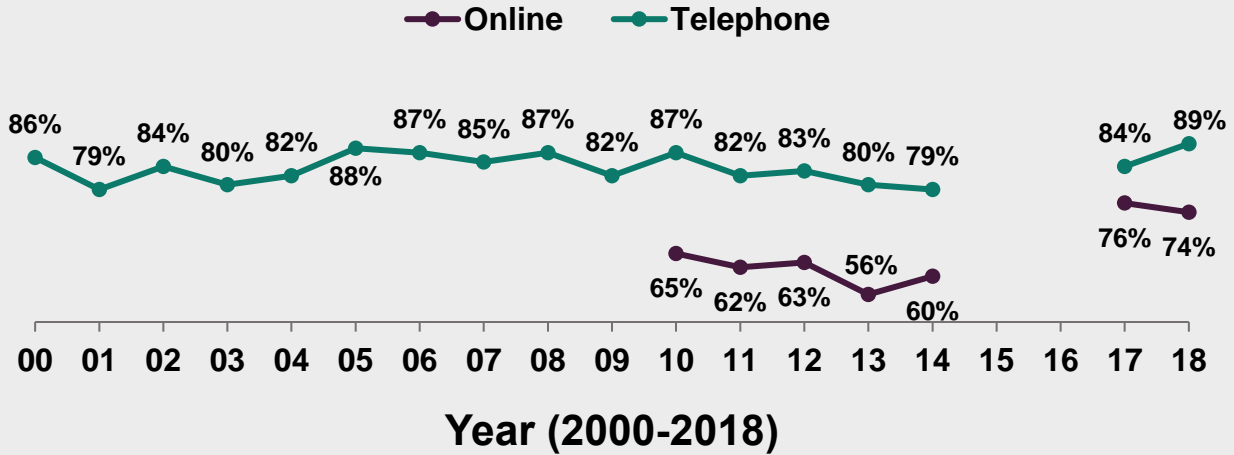
Sample framework: All

In 2018, changes were made to the survey instrument in order to ensure respondents are not biased towards any answer options and to allow for respondents to select neutral options.

A 10-point scale offers far more discrimination than the previous 4-point scale (very poor value, poor value, good value and very good value). Due to the changes in the scale, the neutral responses have been removed to allow for comparable trending analysis. In the future, trending analysis will include the neutral option. Refer to Appendix A for more information and related to alternative ways to trend the data results.

The majority of Telephone (89%) and Online – Panel (74%) respondents indicated that they receive very good or good value from Saskatoon services.

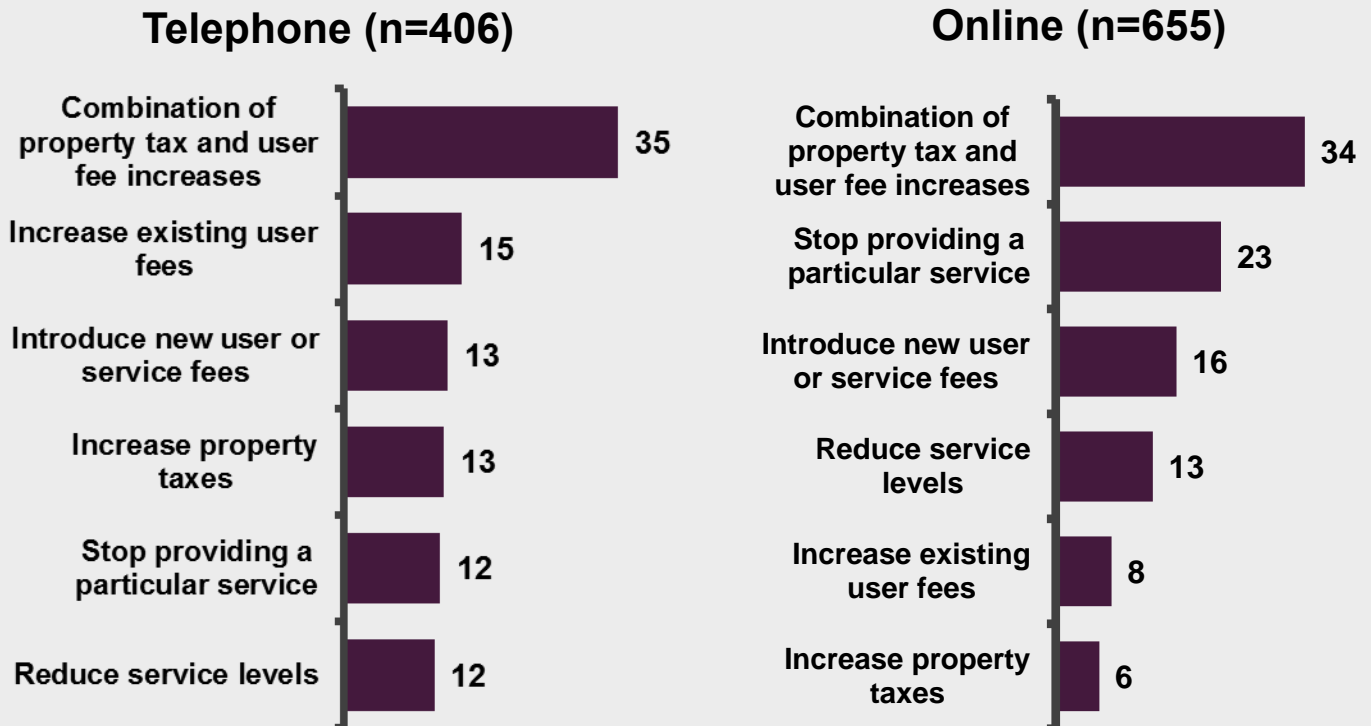
Rating Value of Services Provided by the City (%Very Good Value/Good Value) *Neutral Option Removed



Q4. *[Trending includes TOP2, “neither good value nor poor value” responses were removed (Online: $n = 227$, Telephone $n = 104$) from 2018 to make the scale comparable.] Question was modified from 2016 to remove any potential bias. Note: the question was not asked from 2015 to 2016

When compared to 2017, Telephone has increased slightly (+5%). When considering the margin of error, Online results have remained consistent with 2017.

Preferred Approaches to Balancing Operating Budget (%)



Q5. Occasionally, the City needs to make choices on how to balance its operating budget. Which of the following approaches, if any, would you most prefer?

Sample size: Telephone $n = 406$, Online - Panel $n = 655$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

About a third of respondents (Telephone: 35%, Online – Panel: 34%) prefer a combination of property tax and user fee increases in order to balance the City's operating budget.

There was a significant increase for online respondents (+14%) that would prefer the option to stop providing a particular service when compared to 2017.

There was also a slight increase in the preference for telephone respondents who would prefer to increase property taxes (+6%), and those who prefer to reduce service levels (+5%). And, there was a slight increase in the number of online respondents who would prefer to introduce a new user fee.

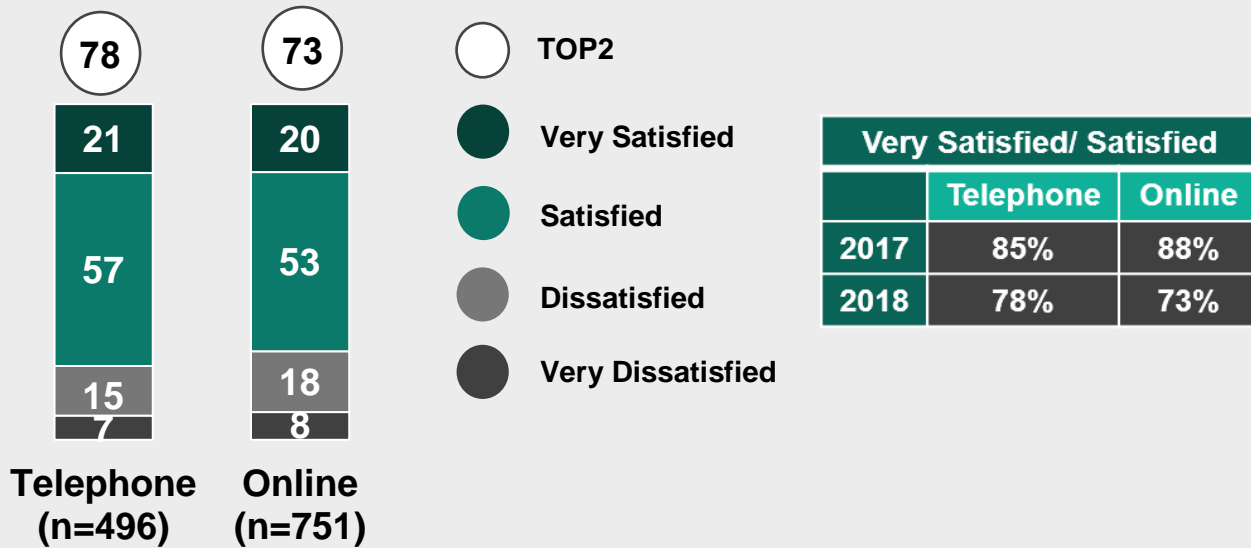
Balancing Method	Telephone					Online				
	2015	2016	2017	2018	Difference from 2017	2015	2016	2017	2018	Difference from 2017
Reduce services	14%	13%	7%	12%	+5%	11%	9%	11%	13%	+2%
Stop providing a service	5%	4%	8%	12%	+4%	9%	9%	9%	23%	+14%
Increase Property Taxes	6%	4%	7%	13%	+6%	5%	4%	7%	6%	-1%
New user or service fee	-	5%	10%	13%	+3%	-	11%	11%	16%	+5%
Increase existing user fee	15%	10%	15%	15%	0%	14%	7%	9%	8%	-1%
Combination of property tax and user fee increases	41%	47%	37%	35%	-2%	29%	29%	31%	34%	+3%

Q6. Overall, how satisfied or dissatisfied are you with the quality of City communications?

Sample size: Telephone $n = 496$, Online - Panel $n = 751$; excluding 'Don't know' and 'Prefer Not to Say' responses

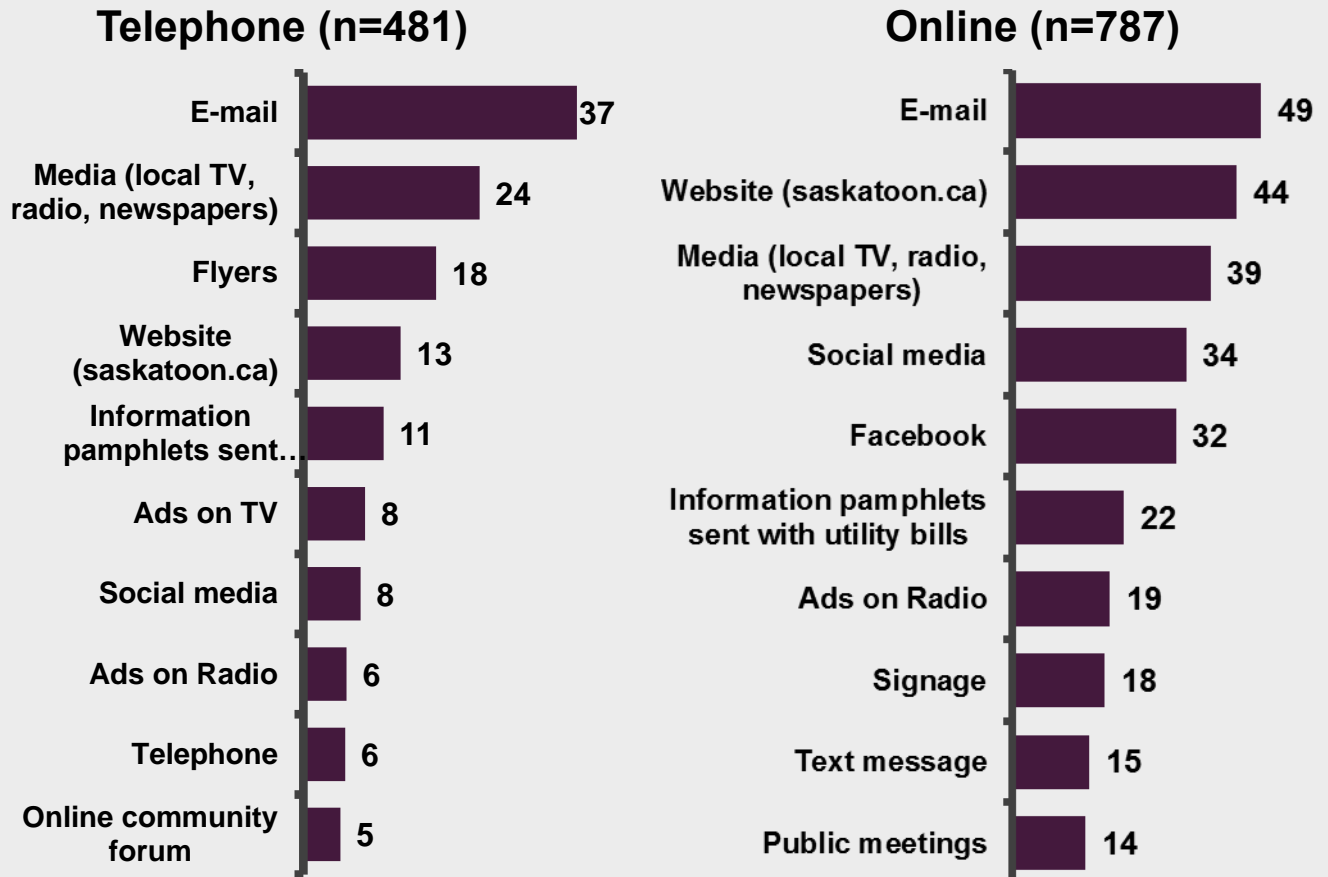
Sample framework: All

Satisfaction with Quality of Communications (%)



About three-quarters (Telephone: 78%, Online – Panel: 73%), of respondents indicated they were satisfied with the quality of City communications. While the majority of respondents indicated they were satisfied with the quality of City communications, this has declined from 2017 (Telephone: - 7%, Online – Panel: -15%).

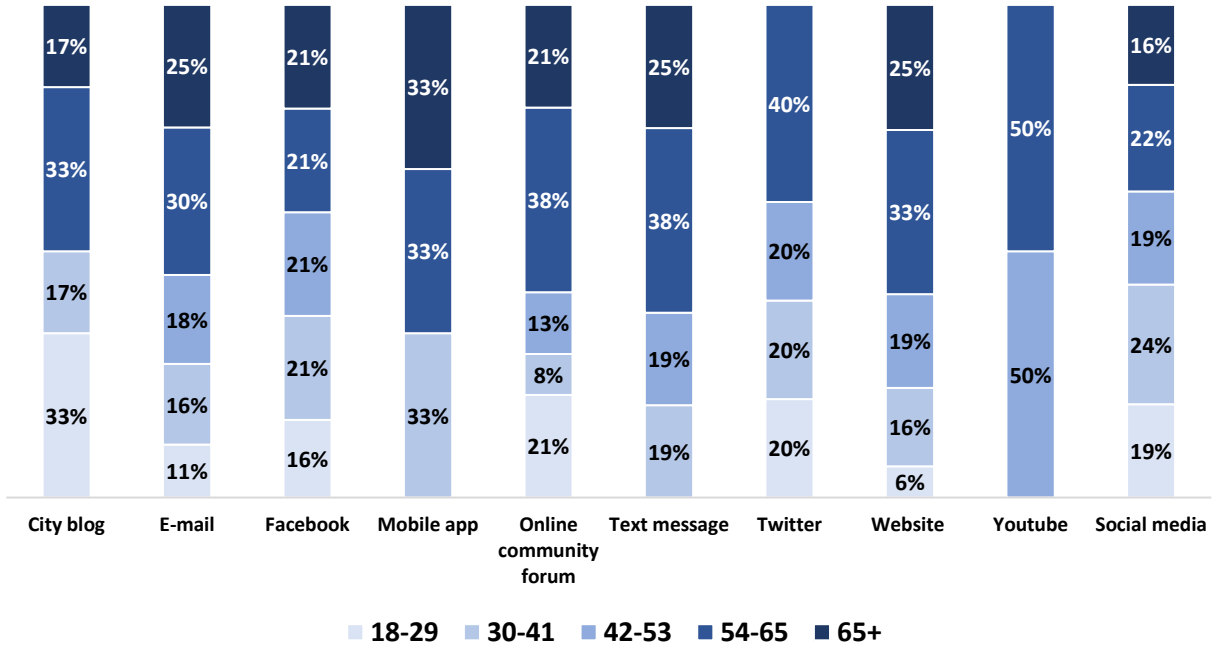
Top 10 Preferred Communication Methods (%)



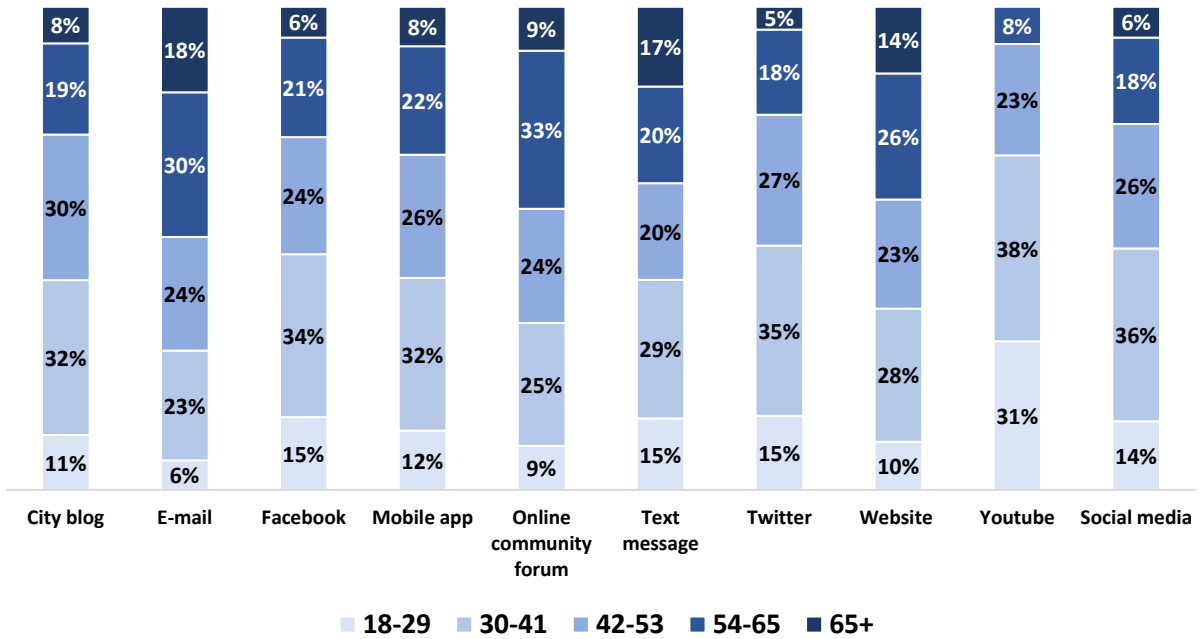
Q7. How do you prefer to receive information about City of Saskatoon programs or services? (Multiple mentions)
Sample size: Telephone $n = 481$, Online - Panel $n = 787$; excluding 'Don't know' and 'Prefer Not to Say' responses
Sample framework: All

Although citizens still prefer to use a mix of sources to receive information about the City of Saskatoon the most common preferences continue to be E-mail across all respondents (Telephone: 37%, Online – Panel: 49%), followed by Website (saskatoon.ca) (Telephone: 13%, Online – Panel: 44%) and Media (Telephone: 24%, Online – Panel: 39%).

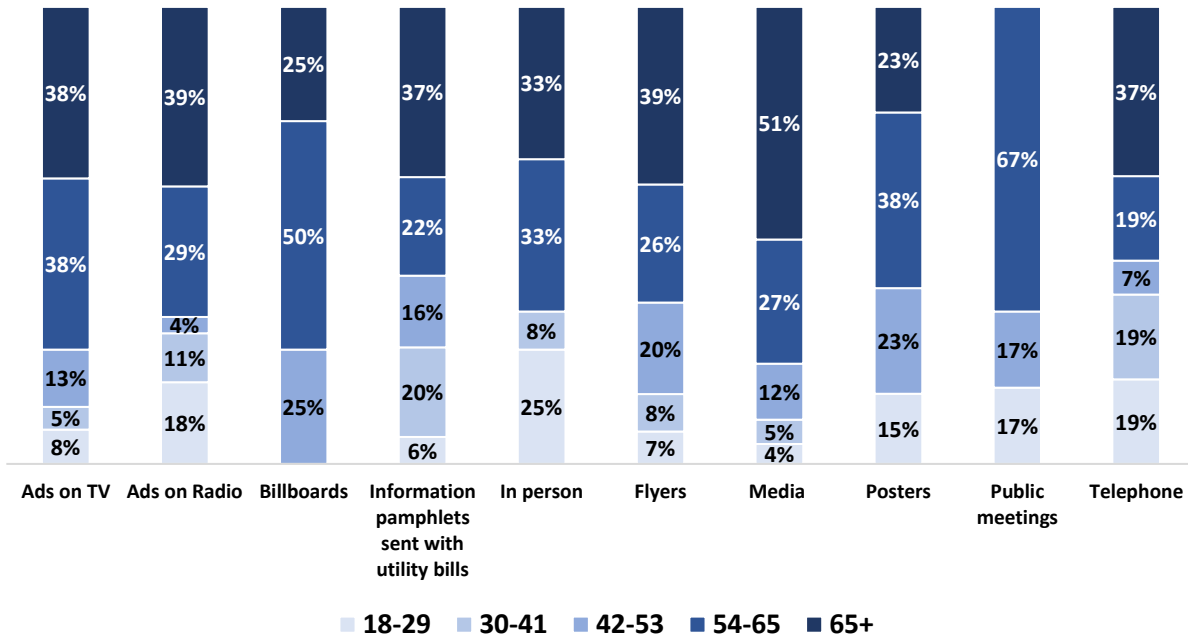
Telephone - Digital Sources by Age



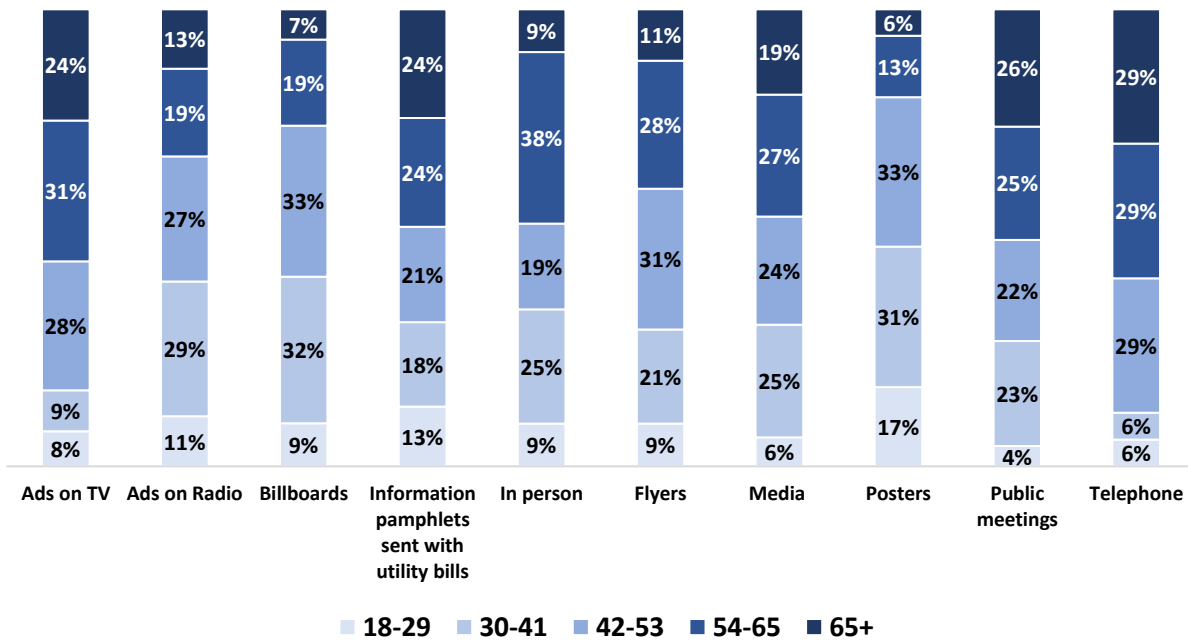
Online - Panel - Digital Sources by Age



Telephone - Traditional Sources by Age



Online - Panel - Traditional Sources by Age

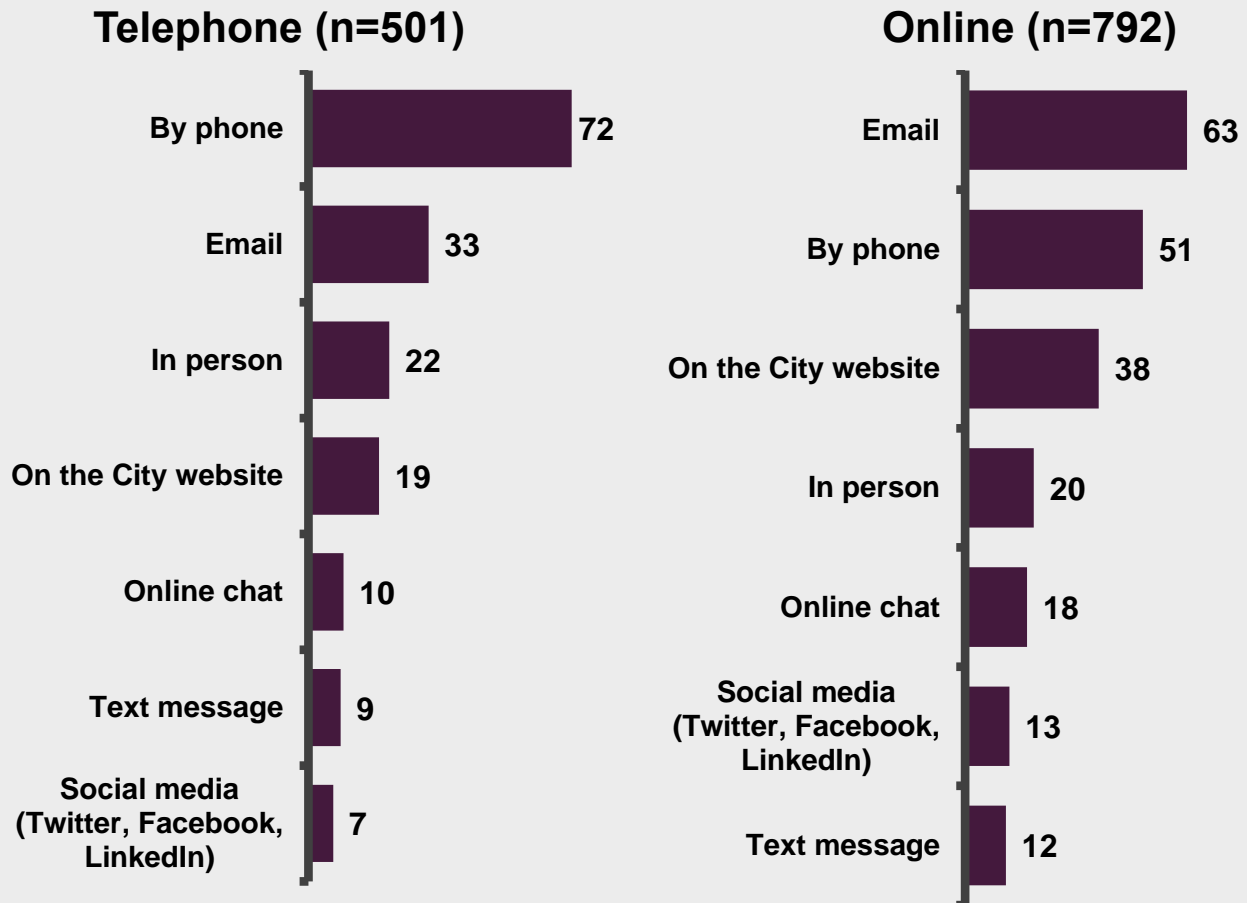


Similar to previous years, it is noted that younger residents more commonly selected digital sources, while older residents more commonly selected traditional methods.

Digital Sources	Telephone						Online					
	2014	2015	2016	2017	2018	Difference from 2017	2014	2015	2016	2017	2018	Difference from 2017
City of Saskatoon website	32%	27%	33%	33%	13%	-20%	62%	62%	65%	59%	44%	-15%
Email	31%	36%	38%	31%	37%	+6%	42%	45%	46%	45%	49%	+4%
Facebook	7%	3%	9%	8%	4%	-4%	20%	26%	34%	35%	32%	-3%
Twitter	-	-	6%	5%	1%	-4%	-	-	12%	13%	11%	-2%
Online community forums	-	-	9%	5%	5%	0%	-	-	12%	10%	7%	-3%
YouTube	-	-	2%	2%	-	-	-	-	4%	7%	3%	-4%
City blog	-	-	3%	2%	1%	-1%	-	-	8%	9%	7%	-2%
Mobile app	-	-	4%	2%	1%	-1%	-	-	17%	17%	13%	-4%
Text messages	5%	4%	4%	1%	3%	+2%	11%	14%	14%	12%	15%	+3%

Traditional Sources	Telephone						Online					
	2014	2015	2016	2017	2018	Difference from 2017	2014	2015	2016	2017	2018	Difference from 2017
Information flyers	10%	3%	22%	27%	11%	-16%	30%	28%	34%	34%	22%	-12%
Flyers	25%	30%	14%	22%	18%	-4%	26%	33%	26%	22%	14%	-8%
Print ads	28%	16%	21%	17%	1%	-16%	26%	23%	28%	22%	18%	-4%
The Media	23%	15%	18%	14%	24%	+10%	43%	48%	42%	41%	39%	-2%
TV ads	20%	8%	9%	6%	8%	+2%	26%	25%	23%	20%	10%	-10%
Radio ads	19%	7%	11%	6%	6%	0%	34%	32%	27%	26%	19%	-7%
Telephone	-	-	4%	4%	6%	+2%	-	-	4%	3%	2%	-1%
Billboards	7%	2%	4%	3%	1%	-2%	19%	18%	19%	18%	14%	-4%
Posters	5%	3%	3%	3%	3%	0%	14%	14%	13%	10%	7%	-3%
Public Meetings	6%	1%	4%	3%	1%	-2%	13%	10%	14%	14%	14%	0%
In person	-	-	2%	3%	2%	-1%	-	-	6%	5%	4%	-1%

Preferred Methods of Contacting the City (%)



Q8. Generally, how would you prefer to contact the City of Saskatoon? **(Multiple mentions)**

Sample size: Telephone $n = 501$, Online - Panel $n = 792$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

Telephone was reported as the most preferred method that telephone respondents (72%) would use to contact the City of Saskatoon.

E-mail was reported as the most preferred (Online – Panel: 63%) method that online respondents would use to contact the City of Saskatoon.

The least preferred methods of contacting the City of Saskatoon are:

- Social media (Telephone: 7%, Online – Panel: 13%)
- Text message (Telephone: 9%, Online – Panel: 12%)

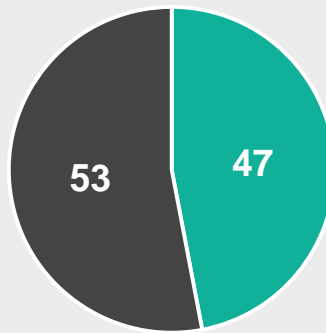
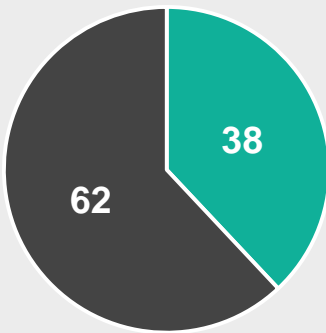
There was an increase in telephone respondents' preferences towards Email (+6%), and Text message (+7%) when compared to 2017. There was a large increase in online respondents' preferences towards Email (+17%) when compared to 2017.

Methods of Contact	Telephone					Online				
	2015	2016	2017	2018	Difference from 2017	2015	2016	2017	2018	Difference from 2017
By phone	81%	75%	65%	72%	+7%	68%	60%	57%	51%	-6%
Email	31%	37%	27%	33%	+6%	43%	45%	46%	63%	+17%
In person at the counter	23%	32%	21%	22%	+1%	29%	30%	23%	20%	-3%
On the City website	18%	32%	21%	19%	-2%	33%	45%	41%	38%	-3%
Online chat	4%	13%	12%	10%	-2%	14%	16%	17%	18%	+1%
Social media channels	2%	9%	4%	7%	+3%	8%	7%	11%	13%	+2%
Text message	-	10%	2%	9%	+7%	-	6%	7%	12%	+5%

Contacted City for Business-Related Reason (%)

Telephone (n=501)

Online (n=795)



Contacted City in Past 12 Months		
	Telephone	Online
2016	55%	48%
2017	53%	47%
2018	38%	47%

No

Yes

Q9. In the past twelve months, have you contacted the City of Saskatoon or one of its employees for a business-related reason?

Sample size: Telephone $n = 501$, Online - Panel $n = 795$; excluding 'Don't know' and 'Prefer Not to Say' responses

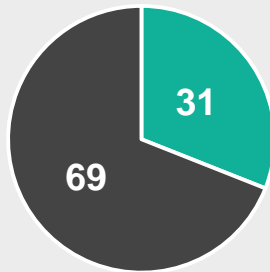
Sample framework: All

Just under half (Telephone: 38%, Online – Panel: 47%) of respondents contacted the City for a business-related reason. This has decreased slightly for telephone respondents, compared to 2017, and held constant for online respondents.

Volunteering in the Community (%)

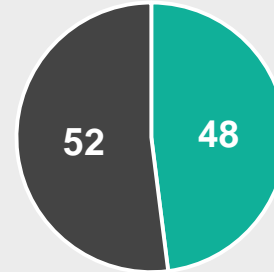
Telephone (n=501)

Online (n=766)



Do Not Volunteer

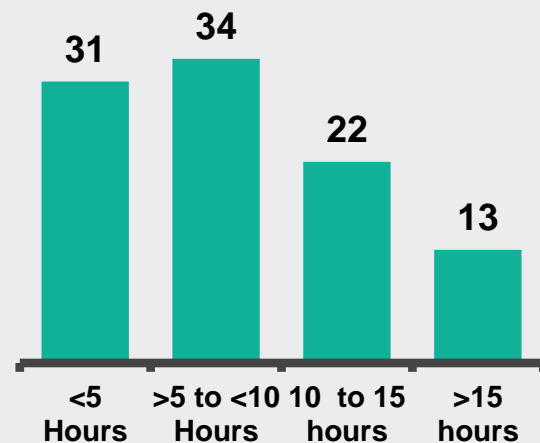
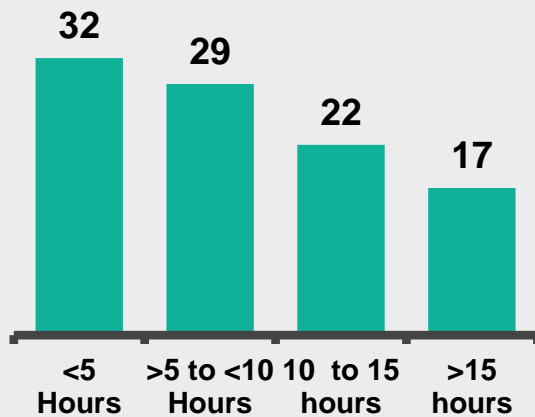
Volunteer



Number of Volunteered Hours in a Month (%)

Telephone (n=157)

Online (n=358)



Q10a. Do you volunteer in the community? An example could be at a hospital, as a youth sports coach, or at a local shelter. (Top)

Sample size: Telephone $n = 501$, Online - Panel $n = 766$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

Q10b. In an average month, how many hours do you volunteer? (Bottom)

Sample size: Telephone $n = 157$, Online - Panel $n = 358$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: Volunteers in community

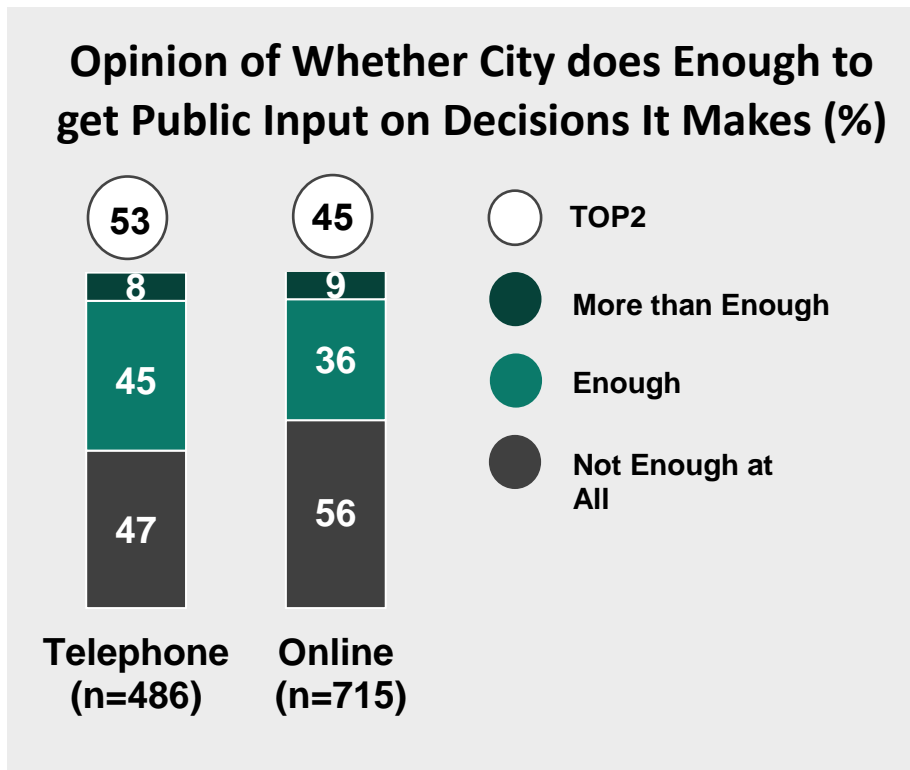
Almost half (48%) of the online respondents indicated they volunteered in their community. However, there were fewer (31%) telephone respondents who indicated they volunteered in their community.

Of the respondents who volunteer in the community, about a third (Telephone: 32%, Online – Panel: 31%) volunteer less than 5 hours per month, about a third (Telephone: 29%, Online – Panel: 34%) volunteer more than 5 hours, but less than 10 hours.

When comparing 2017 to 2018, there was a large increase in the telephone respondents who indicated they do not volunteer in the community (+25%). Similarly, there was a large increase in online respondents who indicated they do not volunteer in the community (+18%). While volunteerism was down generally, we did see a slight increase in the number of those that volunteer a lot with a modest increase of (+4%) of those that volunteer between 10-15 hours per month.

Number of Volunteered Hours in a Month

	Telephone				Online			
	2016	2017	2018	Difference from 2017	2016	2017	2018	Difference from 2017
None	-	44%	69%	+25%	-	34%	52%	+18%
Less than 5 hours/month	-	24%	10%	-14%	-	32%	15%	-17%
Between 5-10 hours/month	-	16%	9%	-7%	-	20%	16%	-4%
Between 10-15 hours/month	-	7%	7%	0%	-	7%	11%	4%
More than 15 hours/month	-	10%	5%	-5%	-	6%	6%	0%
*Volunteer to some degree	62%	-	-	-	64%	-	-	-



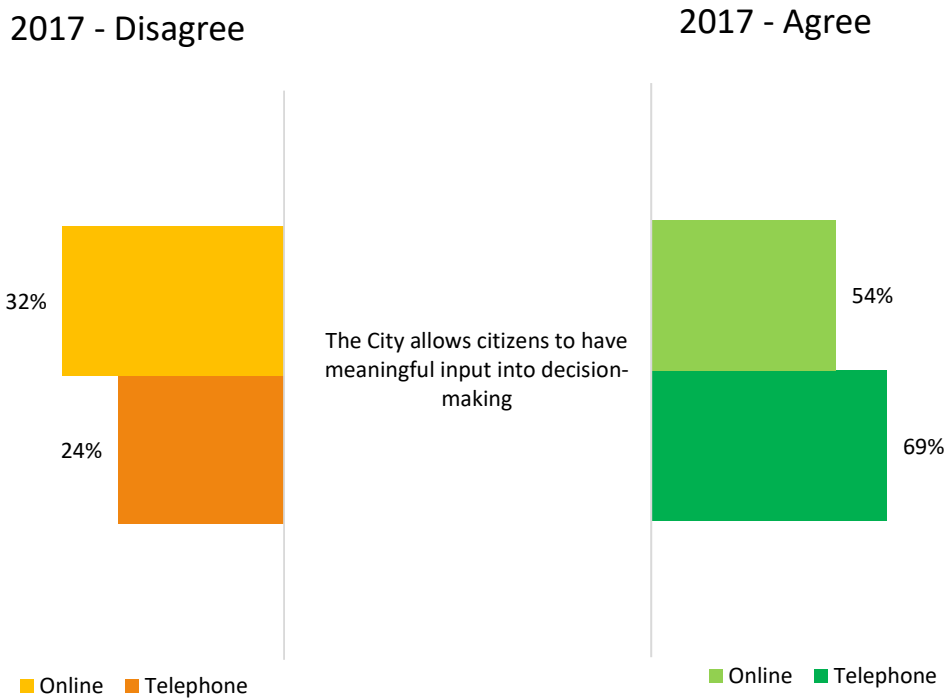
Q10d. Do you think the City does enough, or not, to get the public's input on the decisions it makes?

Sample size: Telephone $n = 486$, Online - Panel $n = 715$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

The majority of online respondents (Online – Panel: 56%) indicated that the City does not do enough to get the public's input on decisions. Telephone respondents had mixed reviews on whether or not the City does enough to get the public's input on their decisions (Not enough at all: 47%, Enough: 45%).

The following graphs are from the 2017 survey data. In the 2017 survey, there was a similar question asked; for participants who have and have not contacted the city they were asked if the City allows citizens to have meaningful input into decision making. Trending/direct comparisons cannot be made, as the question and answer options were not the same. However, we included the 2017 results in this report for information.



An additional question related to community engagement was included in the 2018 survey. Refer to Appendix B for more information related to this specific question.

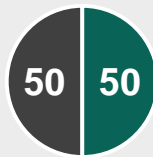
Strategic Goal Performance Indicators

Respondents were asked to rate a series of questions related to the City of Saskatoon strategic goals. The results related to questions for online services, safety, mix of recreation, sport, and cultural facilities, downtown, and balancing growth are intended to provide a baseline in order to measure future progress.

Use of Services Offered Online (%)

Telephone (n=503)

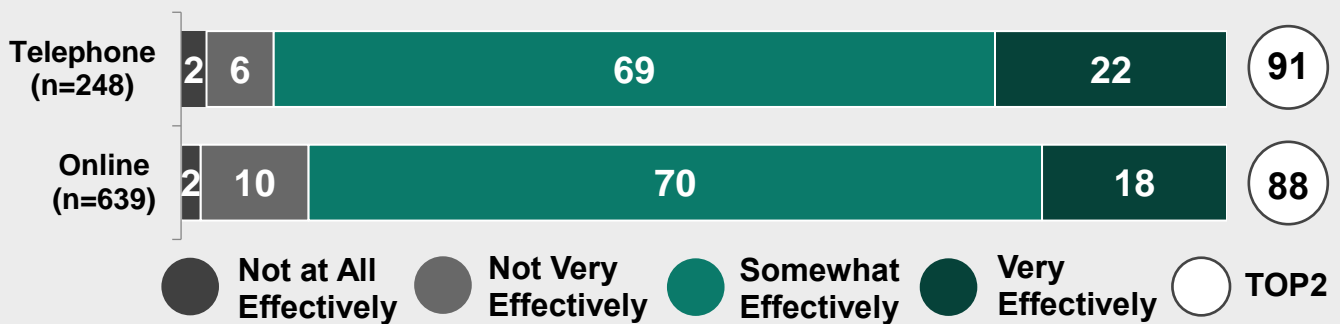
Online (n=789)



No

Yes

Rating the Effectiveness of Providing Services Online (%)



Q11a. Have you ever used any of the services the City of Saskatoon offers online? (Top); **Q11b.** In your opinion, how effectively, if at all, does the City of Saskatoon provide services online? (Bottom)

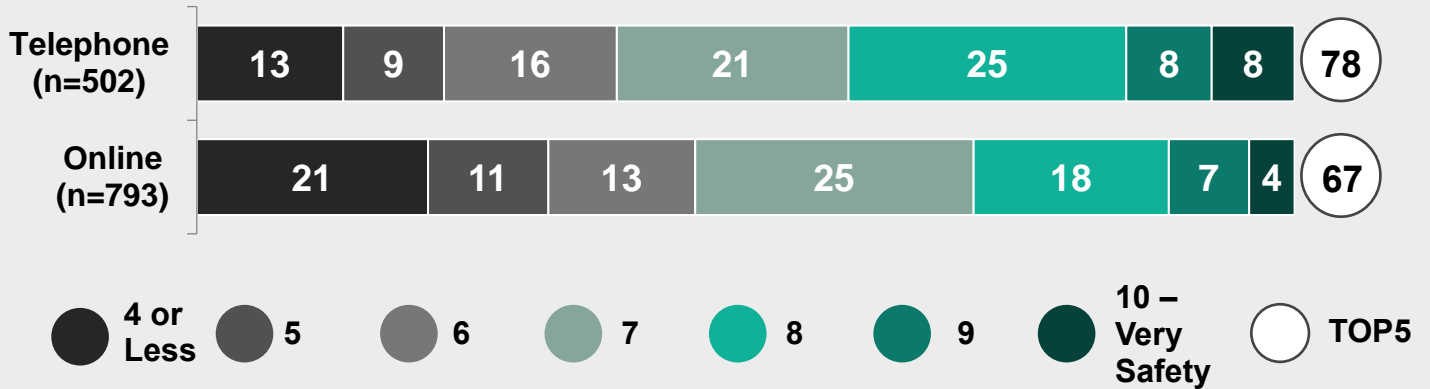
Sample size: [Top] Telephone $n = 503$, Online - Panel $n = 789$; excluding 'Don't know' and 'Prefer Not to Say' responses; [Bottom] Telephone $n = 248$, Online - Panel $n = 639$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All (Top, pie chart); Used online services (Bottom, line graphs).

The majority of online respondents (Online – Panel: 82%) indicated they have used the services the City of Saskatoon offers online, compared to only 50% of telephone respondents.

Close to 9-in-10 respondents (Telephone: 91%, Online – Panel: 88%) rated the City of Saskatoon’s online services as very effective or effective.

Rating Feeling of Safety Living in City (%)



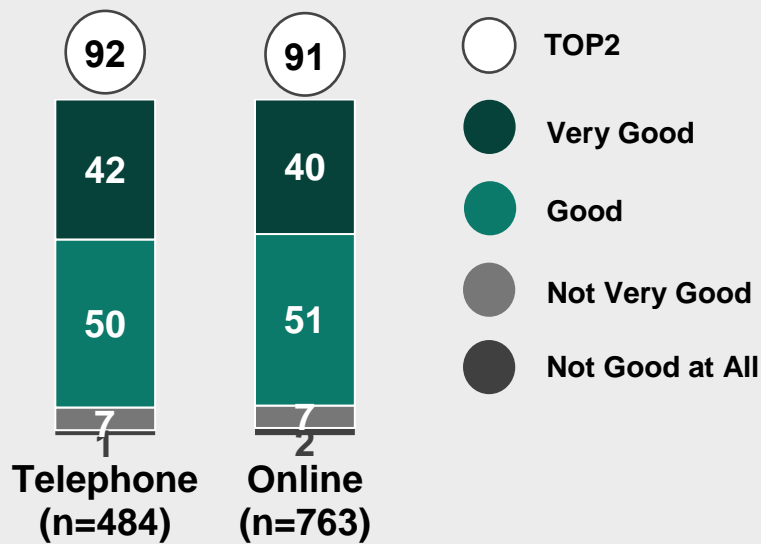
Q12a. If you were to ask a family member, or colleague, how safe they feel living in Saskatoon, how do you think they would answer? *[TOP5 = 5-10, BOTTOM = 1-4]

Sample size: Telephone $n = 502$, Online - Panel $n = 793$; excluding 'Don't know' and 'Prefer Not to Say' responses

Sample framework: All

The majority of respondents (Telephone: 78%, Online – Panel: 67%) indicated they thought a family member or colleague would say they feel safe living in Saskatoon.

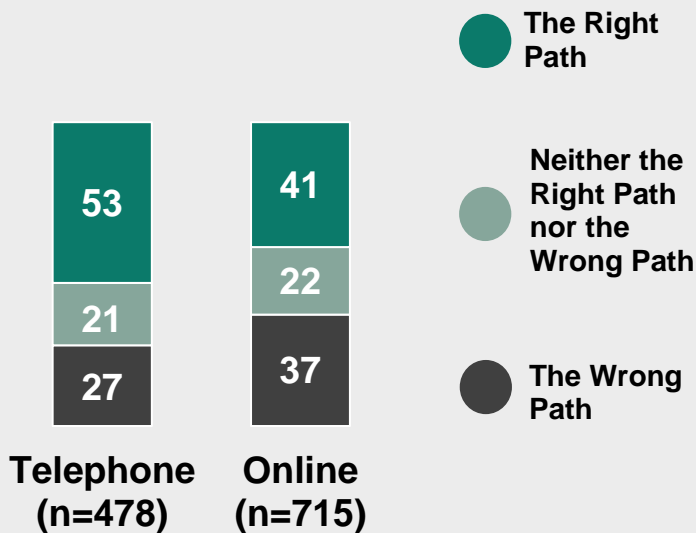
Rating City on Providing Mix of Recreation, Sport, and Cultural Facilities Year-Round (%)



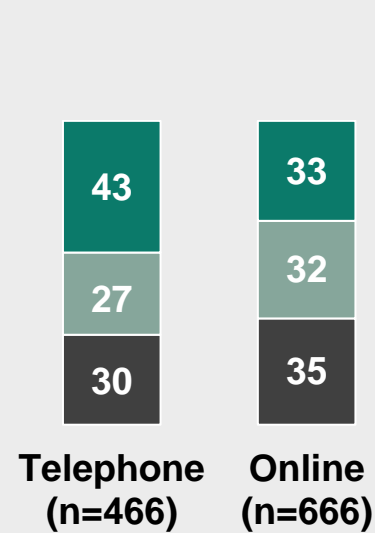
Q12b. Generally, how is the City doing with providing a mix of recreation, sport, and cultural facilities year-round?
Sample size Telephone $n = 484$, Online - Panel $n = 763$; excluding 'Don't know' and 'Prefer Not to Say' responses
Sample framework: All

The vast majority of respondents (Telephone: 92%, Online – Panel: 91%,) rated the City as very good or good with providing a mix of recreation, sport, and cultural facilities year-round.

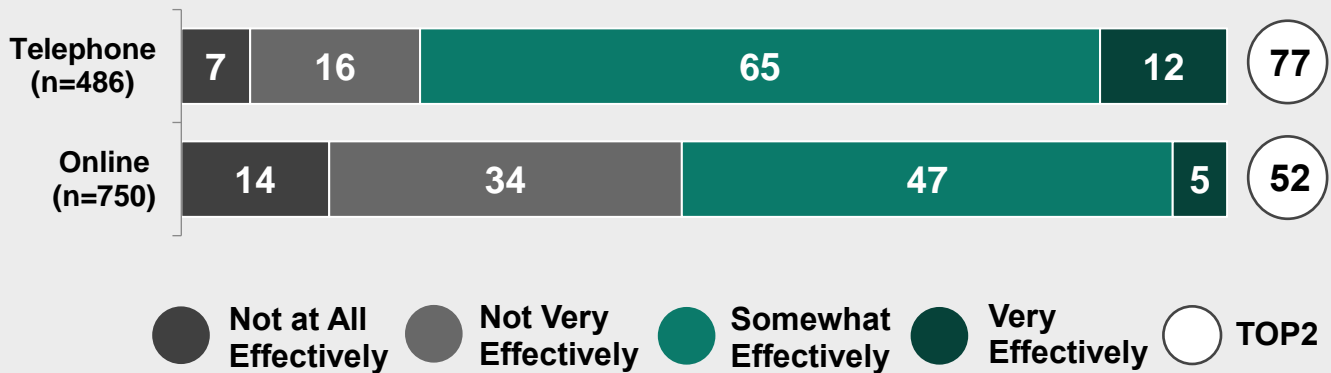
Opinion of City's Approach to Making Downtown an Appealing Destination (%)



Opinion of City's Approach to Making Downtown an Appealing Place to Live (%)



Rating the Effectiveness of Balancing Growth Throughout the City (%)



Q13a. In your opinion, is the City of Saskatoon on the right path or the wrong path toward making downtown an appealing destination? (Top Left); **Q13b.** In your opinion, is the City of Saskatoon on the right path or the wrong path toward making downtown an appealing place to live? (Top Right) **Q13c.** In your opinion, how effectively, if at all, is the City of Saskatoon balancing growth throughout the city? (Bottom)

Sample size 13a) Telephone $n = 478$, Online - Panel $n = 715$; excluding 'Don't know' and 'Prefer Not to Say' responses (Top Left); 13b) Telephone $n = 466$, Online - Panel $n = 666$; excluding 'Don't know' and 'Prefer Not to Say' responses (Top Right) 13c) Telephone $n = 486$, Online - Panel $n = 750$; excluding 'Don't know' and 'Prefer Not to Say' responses (Bottom)

Sample framework: All

The majority of Telephone (53%) and Online – Panel (41%) respondents indicated that the City of Saskatoon is on the right path towards making downtown an appealing destination. In addition, 21% (telephone) and 22% (online) provided more neutral responses.

Respondents had mixed ratings (similar proportions on both ends of the scale) on whether the City of Saskatoon is on the right path toward making downtown an appealing place to live. This question received more neutral responses for both telephone and online.

The majority of Telephone (77%) and Online – Panel (52%) respondents indicated the City of Saskatoon is effectively balancing growth throughout the city.

Strategic Goals

Telephone

TOP2

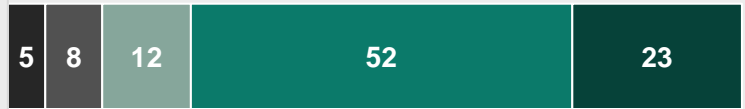
Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree

Saskatoon is an inclusive and welcoming city to all



86

The City of Saskatoon does a good job preserving natural resources and protects the environment



75

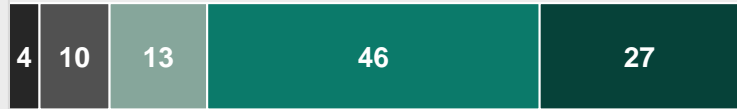
The City of Saskatoon is investing in a mix of transportation options for moving around



56

Online

Saskatoon is an inclusive and welcoming city to all



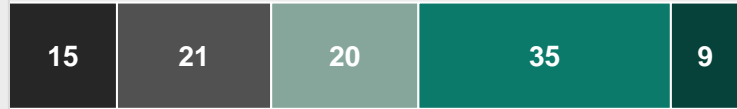
73

The City of Saskatoon does a good job preserving natural resources and protects the environment



62

The City of Saskatoon is investing in a mix of transportation options for moving around



44

Q14. For each, you may strongly disagree, somewhat disagree, neither agree nor disagree, somewhat agree, or strongly agree.

Sample size: Varies

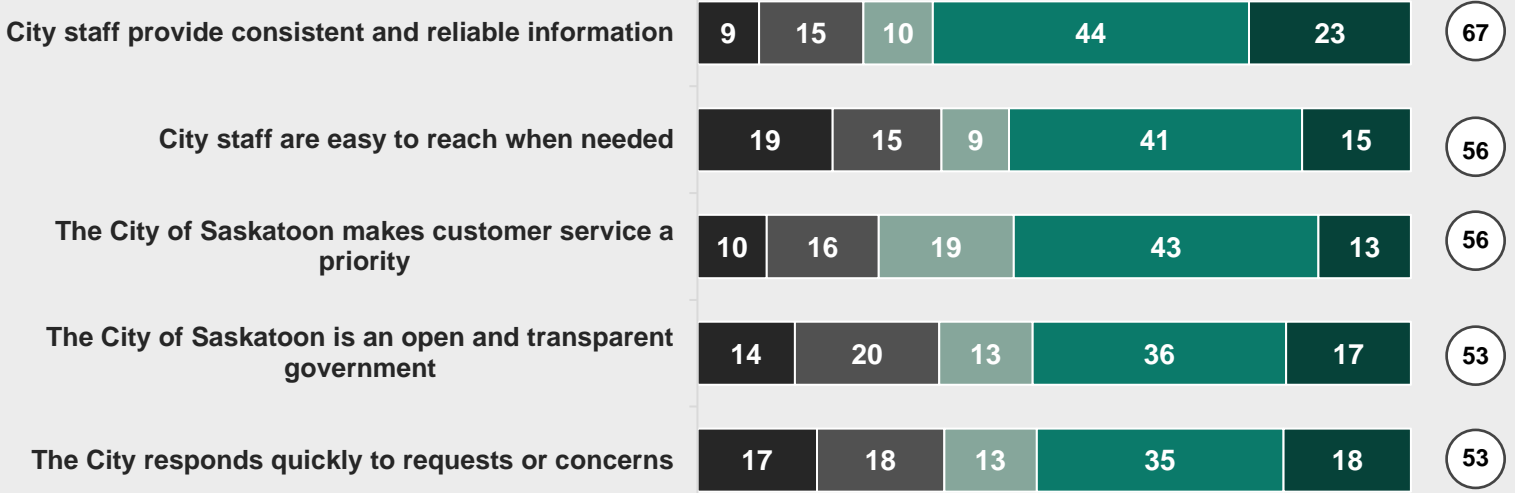
Sample framework: All

Customer Service

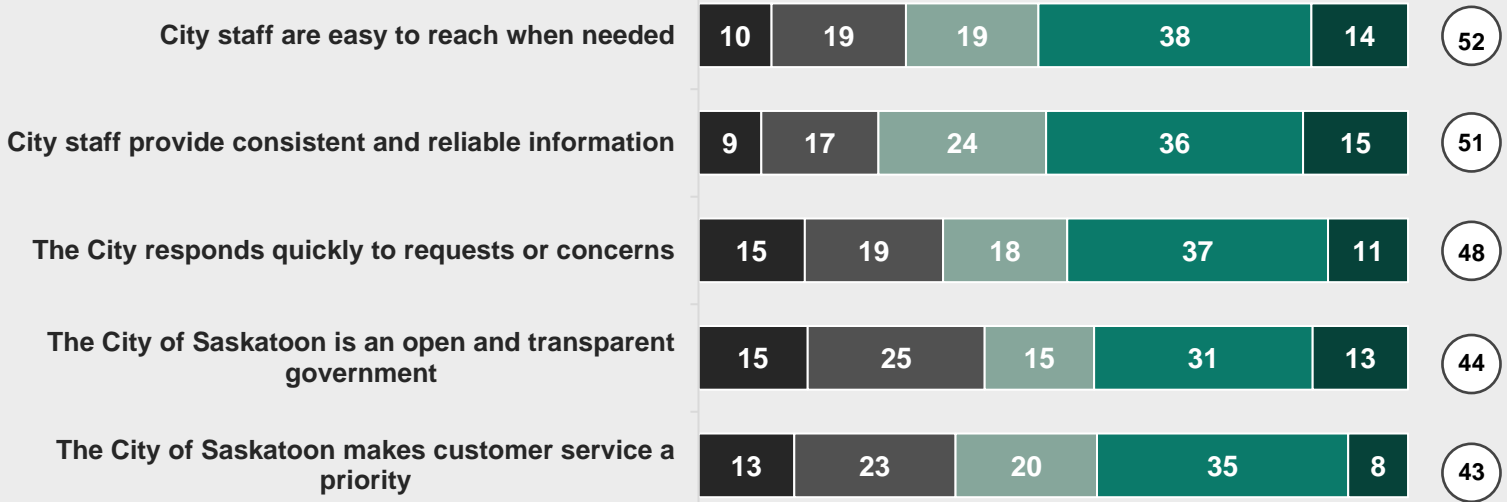
Telephone

TOP2

Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree



Online



Q14. For each, you may strongly disagree, somewhat disagree, neither agree nor disagree, somewhat agree, or strongly agree.

Sample size: Varies

Sample framework: All

Respondents were asked to rate a series of statements related to the City of Saskatoon strategic goals. The information is intended to provide a baseline in order to measure future progress.

- A total of 86% of telephone and 73% of online panel respondents agree Saskatoon is an inclusive welcoming city to all.
- A total of 75% of telephone and 62% of online panel respondents agree the City does a good job preserving natural resources and protects the environment.
- A total of 56% of telephone and 44% of online panel respondents agree the City is investing in a mix of transportation options for moving around.

Respondents were asked to rate a series of statements about the City of Saskatoon customer service.

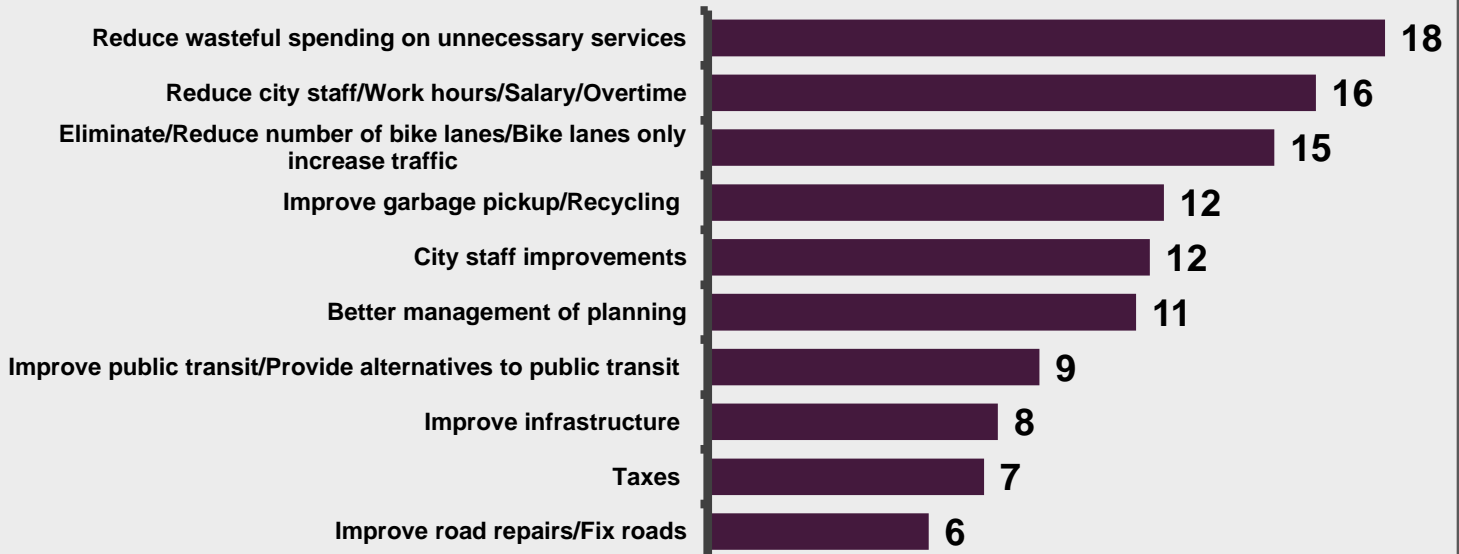
- A total of 67% of telephone and 51% of online respondents agree/strongly agree that City staff provide consistent and reliable information.
- A total of 56% of telephone and 52% of online respondents agree/ strongly agree that City staff are easy to reach when needed.
- A total of 56% of telephone and 43% of online respondents agree/strongly agree that the City of Saskatoon makes customer service a priority.
- A total of 53% of telephone and 44% of online respondents agree/strongly agree that the City of Saskatoon is an open and transparent government.
- A total of 53% of telephone and 48% of online respondents agree/strongly agree that the City responds quickly to requests or concerns.

	Agree - Telephone			Agree - Online		
	2017	2018 *neutral removed	Difference from 2017	2017	2018 *neutral removed	Difference from 2017
City responds quickly to requests or concerns	71%	60%	-11%	66%	58%	-8%
City staff are easy to reach when needed	72%	62%	-10%	68%	64%	-4%
The City of Saskatoon makes customer service a priority	77%	69%	-8%	68%	54%	-14%
City of Saskatoon is an open and transparent* Government	81%	61%	-20%	64%	52%	-12%

*In the 2017 survey, the question was worded: "open and accessible". Due to the change in wording, these results are not directly comparable.

Respondents from the randomized telephone were directed to the City of Saskatoon website if they were interested in providing a suggestion on finding efficiencies or savings. The following information reflects the responses for the Online-Panel only.

Suggestions on Efficiencies or Savings (%) *Online - Panel



Other Towns / Regions / Countries (%) *Online - Panel



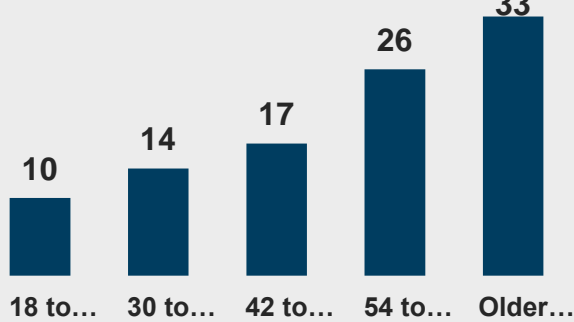
D5b. Do you have a suggestion on finding efficiencies or savings, that doesn't include reducing or eliminating an existing service or services? Please describe your idea on how the City of Saskatoon can become more efficient, or find savings, but please keep in mind your idea should not include reducing or eliminating an existing service or services. **D5c.** As far as you know, has your suggestion been tried elsewhere, and, if so, in what town, region, or country was it tried?

Sample size: Top: 446, Bottom: 130

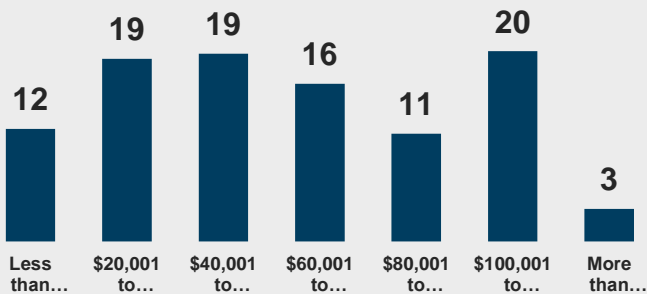
Sample framework: Online – Panel - All

Demographic Profile of Respondents
Participating Via Telephone Interviewing

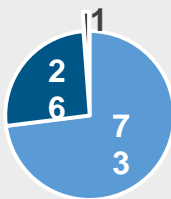
Age in Years (%)



Annual Household Income
Before Taxes (%)



Housing (%)



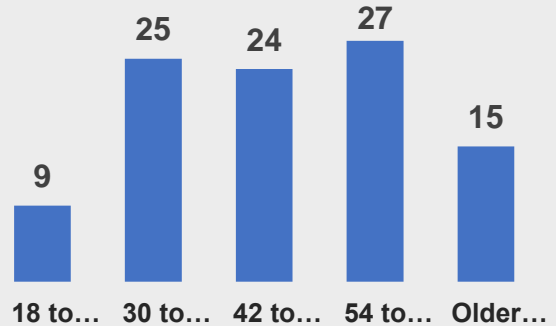
Rent

Neither

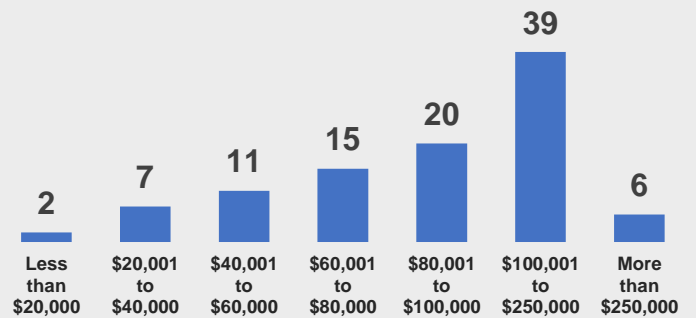
Own

Demographic Profile of Respondents
Participating Via Online Survey

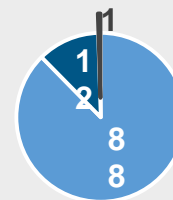
Age in Years (%)



Annual Household Income
Before Taxes (%)



Housing (%)



Rent

Neither

Own

D1. D7. D2.

Sample size: Telephone n = 504, Online – Panel n = 781 , excluding ‘Don’t know’ and ‘Prefer Not to Say’ responses (Top); Telephone n = 388, Online – Panel n = 616, excluding ‘Don’t know’ and ‘Prefer Not to Say’ responses (Middle); Telephone n = 504, Online – Panel n = 784 , excluding ‘Don’t know’ and ‘Prefer Not to Say’ responses (Bottom)

APPENDIX A

Moving to a ten-point scale

A 10-point scale offers far more discrimination than a 4-or 5-point scale and allows a respondent the ability to provide more nuance to their answer. Additionally, answering on a 10-point scale may be easier for a respondent because a 10-point scale is already likely to be a familiar construct to most.

Different Scaling Year to Year

The City of Saskatoon inquired about the options to trend questions where the scaling differs year to year. Forum Research provided three models for the City of Saskatoon to review and select. Model 3 (Omitting neutral option from analysis) was selected for the overall report, however, the City also requested the data from Model 1 (Include the neutral option for comparison).

The data from Model 1 are included in this document.

Model 1: Including the neutral options for comparison

Pros: Seems to match up well with previous trends. Does not drop anyone from the analysis. Should be fairly easy to explain.

Cons: Some could question the fact that the top and bottom aren't evenly balanced.

Model 3: Omitting neutral from the analysis

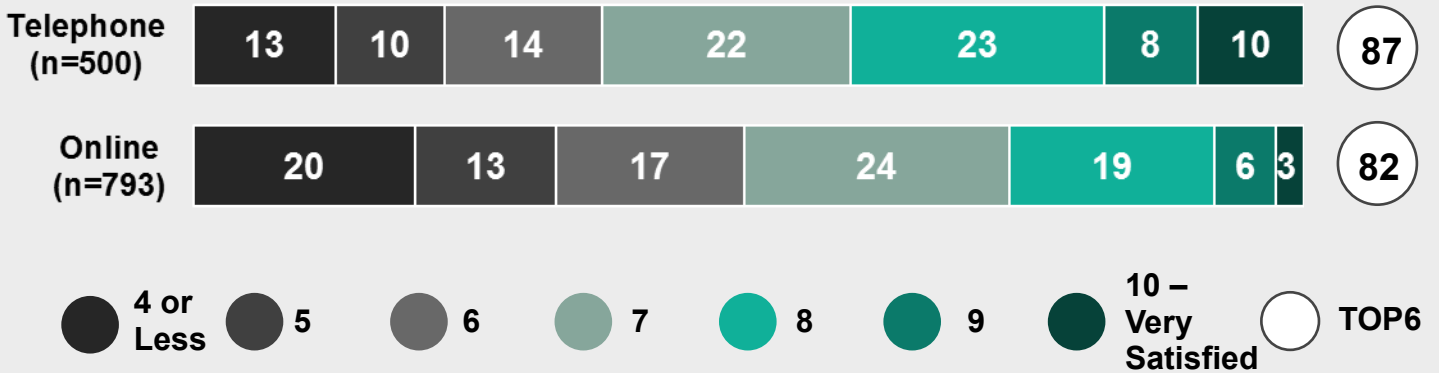
Pros: Shows a consistent trend in line with rest of data. Even split of top and bottom.

Cons: Omits respondents from the dataset. Whichever method we choose will need to be replicated going forward for consistent trending. Which means all neutrals would need to be omitted from the trending comparison for subsequent years.

Q2 – Historically a 4-point scale, which changed to a 10-point scale in 2018

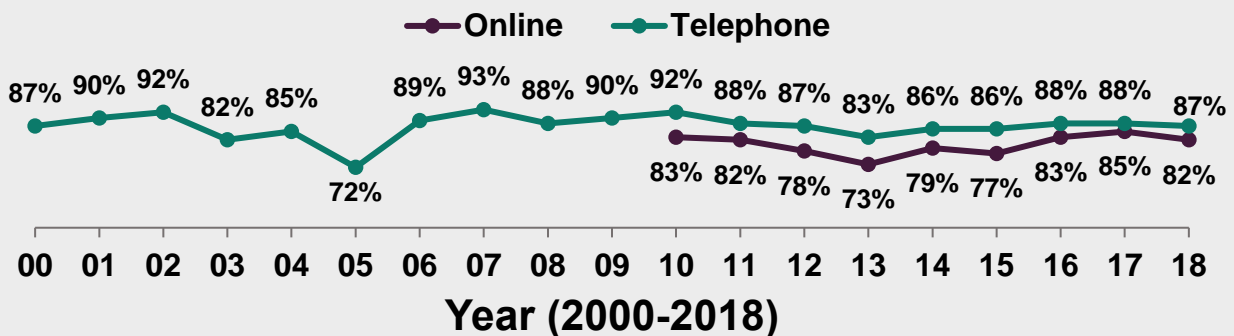
Q4 – Historically a 4-point scale, which changed to a 5-point scale in 2018

Rating Satisfaction with Services Provided by the City (%)



The results using Model 1 are below:

Rating Satisfaction with Services Over Time (%Very Satisfied/Satisfied)



Q2. Overall, how satisfied are you the quality of the services provided by the City of Saskatoon?

Sample size: Telephone $n = 503$, Online - Panel $n = 801$; excluding 'Don't know' and 'Prefer Not to Say' responses

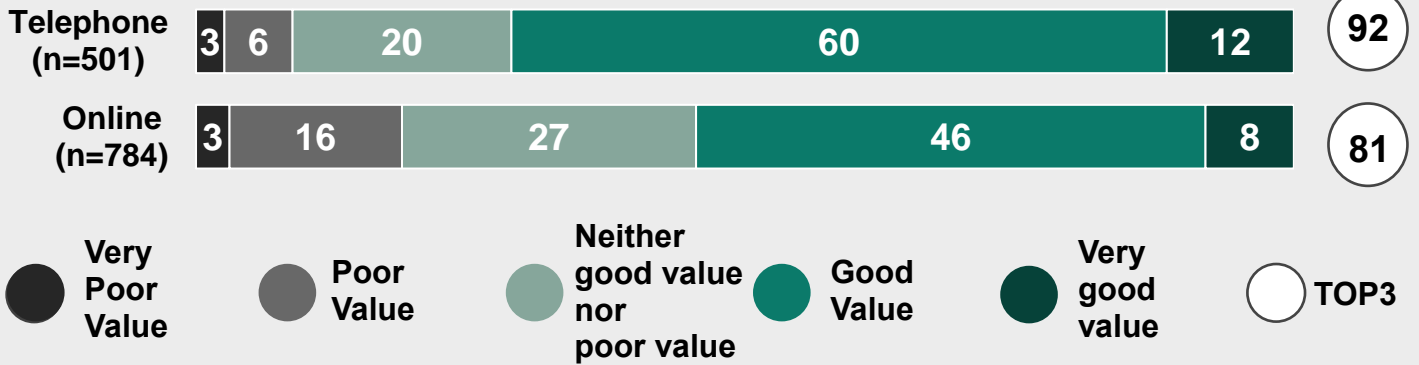
Sample framework: All data is unweighted to ensure accurate historical trending; trending graph only includes online panel respondents *[2018: TOP = 10-5, BOTTOM = 1-4 to make the scale comparable]

The majority (Online – Panel – 82%, Telephone – 87%) of respondents indicated they are satisfied (rating 5,6,7,8,9,10) with the quality of services provided by the City of Saskatoon.

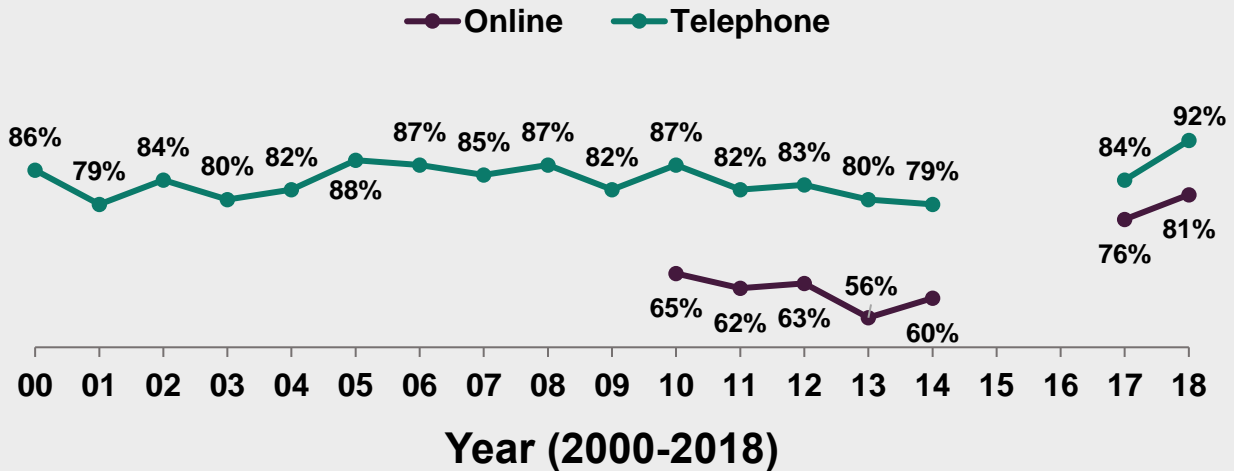
The responses from telephone respondents on the quality of services provided was consistent with the results from 2017, however, satisfaction with services decreased slightly amongst online respondents between 2017 and 2018 (Telephone: -1%, Online: -3%).

The results using Model 1 are below:

Rating Value of Services Provided by the City (%)



Rating Value of Services Provided by the City (%Very Good Value/Good Value)



Q4. Thinking about the services provided to you by the City of Saskatoon, what value, if any, do you receive from these services? *Question was modified from 2017 to remove any potential bias. The question was not asked in 2015-2016.

Sample size: Telephone $n = 501$, Online - Panel $n = 784$; excluding 'Don't know' and 'Prefer Not to Say' responses.

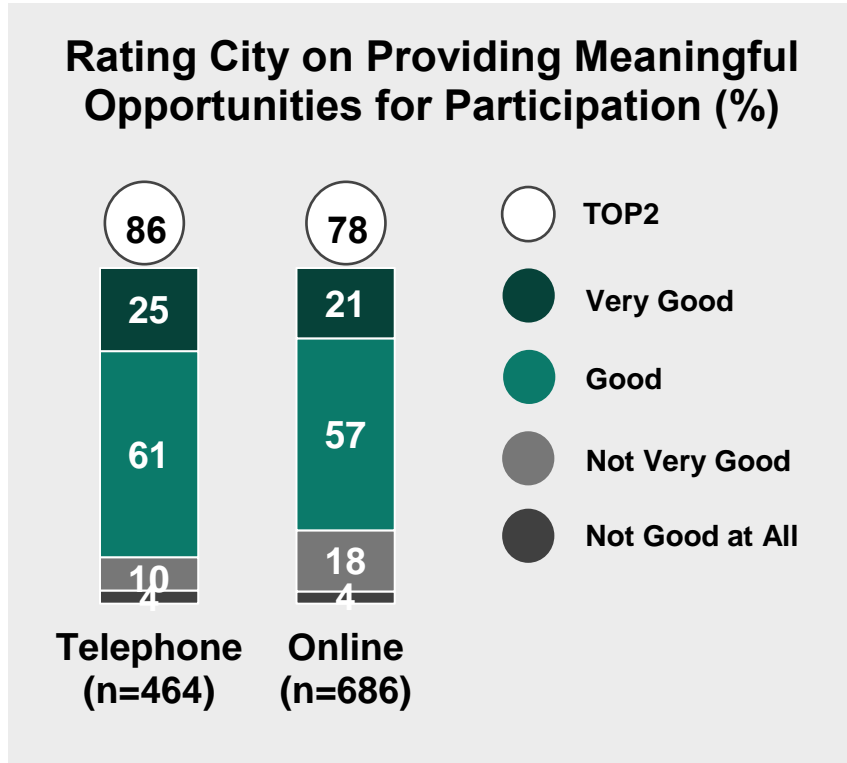
Sample framework: All

*[Trending includes TOP3 for 2018 to make the scale comparable]

The majority of Telephone (92%) and Online Panel (81%) respondents indicated that they receive very good or good value from Saskatoon services, this is higher compared to 2017 (Telephone: +8%, Online: +5%).

APPENDIX B

Participants were also asked, “In your opinion, how good, or not, is the City of Saskatoon at offering meaningful opportunities for its residents to participate?” However, we received significant feedback that this question was not clear. It does not explain what is meant by “opportunities for its residents to participate”. This question will be asked in a different manner in the Civic Spending & Service Priorities Survey and reported with the results of that survey.



It is recognized that the question is not as clear as it should be, as it does not explain what is meant by “opportunities for its residents to participate”. This question will be asked in a different manner in the Civic Spending & Service Priorities Survey.

Q10c. In your opinion, how good, or not, is the City of Saskatoon at offering meaningful opportunities for its residents to participate?

Sample size: Telephone $n = 464$, Online - Panel $n = 686$; excluding ‘Don’t know’ and ‘Prefer Not to Say’ responses

Sample framework: All

More than 8 in 10 telephone respondents, and about three-quarters of online respondents (TOP2 – Telephone: 86%, TOP2 – Online - Panel: 78%), indicated the City is good/very good at offering meaningful opportunities for residents to participate.