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mind, body & soil

TOWN OF WOLFVILLE CITIZEN SATISFACTION SURVEY 2016

OCTOBER 24, 2016

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GAME CHANGERS



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RESEARCH OBJECTIVES

- Ipsos is pleased to present the Town of Wolfville with the results of the 2016 Citizen Satisfaction Survey.
- Specific areas explored in the research include (but are not limited to):
 - Top-of-mind issues in need of attention from local leaders;
 - Overall impressions of the quality of life in the Town of Wolfville;
 - Perceptions of Town services, including perceived importance and satisfaction;
 - Policing resourcing;
 - Perceptions of value for tax dollar;
 - Contact and satisfaction with overall service;
 - Preferred communication needs; and
 - Municipal election and voting

METHODOLOGY

This survey was conducted by telephone and the sample was drawn using random digit dialing (RDD) among Town of Wolfville residents.

A total of 150 interviews were completed among residents 18 years of age and older.

The overall survey results have been weighted by age and gender to reflect the actual population of the Town of Wolfville based on the 2011 Census.

A sample of 150 interviews produces results which can be considered accurate within ± 8.0 percentage points, 19 times out of 20. The margin of error will be larger for subgroups. The sample size asked each of the questions is noted after the question wording at the bottom of the graph (denoted by n=).

This survey was conducted between September 9 to 20, 2016.

Throughout the report totals may not add to 100% due to rounding or because the question is a multi-select question, where respondents were permitted to choose more than one response.

Where possible tracking data from 2013 has been included. Please note that the 2013 data comes from a syndicated survey conducted by Ipsos.

Where possible throughout the report the Town of Wolfville's findings have been compared to the Canadian National Norm. The Ipsos National Norm is a reliable average that includes all of the Citizen Satisfaction Research Studies that we have conducted across the country within the last 5 years.

Significant differences across sub-groups are noted where they exist.

REPORTING CONVENTIONS

- Throughout the report, where available, the data has been compared back to the previous survey conducted in 2013. Statistically significant differences in opinions between 2013 and 2016 have been flagged.
- Significant increases and decreases are noted with the following symbols:
 - ↑ Significant increase
 - ↓ Significant decrease

KEY FINDINGS (1)

Transportation remains the top issue for residents, and focus on this issue is growing.

More than half (56%) mention transportation as the most important issue facing their community, and first mention of this issue is up significantly from 2013 (44% up from 33%). (see p.10)

Overall quality of life scores remain on par with the National Norm, and although strongly positive views are down directionally from 2013, they are significantly higher than the National Norm.

There is almost unanimous consensus among residents that the quality of life in the Town of Wolfville is good (on par with the National Norm), including six in ten (59%) who say “very good.” But this latter figure is directionally lower than in 2013, but significantly higher than the National Norm (45%) . (see p.13)

Overall satisfaction with the level of Town services remains on par with the National Norm, but strongly expressed satisfaction is down significantly from 2013.

A vast majority (90%) of residents remain satisfied with the overall level of Town services, but most residents are only somewhat satisfied (61%), compared to 29% who are very satisfied. Moreover, the proportion who are “very satisfied” is down significantly (29%, down from 38% in 2013). But, both figures are on par with the National Norm. (see p.15)

There is majority satisfaction with nearly all service areas tested in the survey.

Majorities of residents are at least somewhat satisfied with 12 out of 13 service areas tested in the survey. The highest scores, where more than half say they are “very satisfied,” are found for fire services, garbage and recycling, parks, trails and other green spaces and festivals and events. The lowest score is found for roads, with only 27% expressing overall satisfaction and 2% “very satisfied.” (see p.16)

KEY FINDINGS (2)

Land use and community planning, economic development, sidewalks, festivals and events, police services, garbage and recycling, recreation facilities and programs, public transportation and bylaw enforcement are the strongest drivers of overall satisfaction.

Gap analysis (see pp. 18-20) indicates that the Town should keep up its positive performance in these areas as they have the greatest impact on satisfaction with overall level of service. Although the Town is scoring extremely low in the area of roads, it is not a high driver of overall satisfaction, but given that transportation is a top, and growing, issue among residents, it may be important for the Town to focus on this area before it starts to impact on overall satisfaction with services.

Two-thirds (64%) of residents indicate that police resourcing is sufficient, but a sizeable minority (31%) do not. (see p.22)

Large majority continue to perceive that they are getting good value for tax dollars, and this view remains on par with National Norm.

Large majority (78%) believe they are getting good value for their tax dollars based on programs and services they receive from the Town, including two in ten (19%) who say they receive very good value. Moreover, these figures remain on par with 2013 and the National Norm. (see p.24)

KEY FINDINGS (3)

Email remains the most preferred method for communications from the Town, and this view is up from 2013.

More than four in ten (44%) indicate that email is the best method for the Town to communicate information to them, and this figure is up 13 points from 2013. Mail outs and bill inserts are also a top preferred method for communication (31%). There has been a significant increase in mention of social media (15%, up from 5% in 2013). (see p.26)

An increasing proportion of residents have contacted the Town in the last 12 months (58%, up from 48%), and among those who have made contact there has been a directional decline in satisfaction with the overall service received. (see pp.28 and 30)

Eligibility to vote and not having lived in the Town at the time are the main reasons residents give for not having voted in the 2012 Municipal Election. (see p. 32)

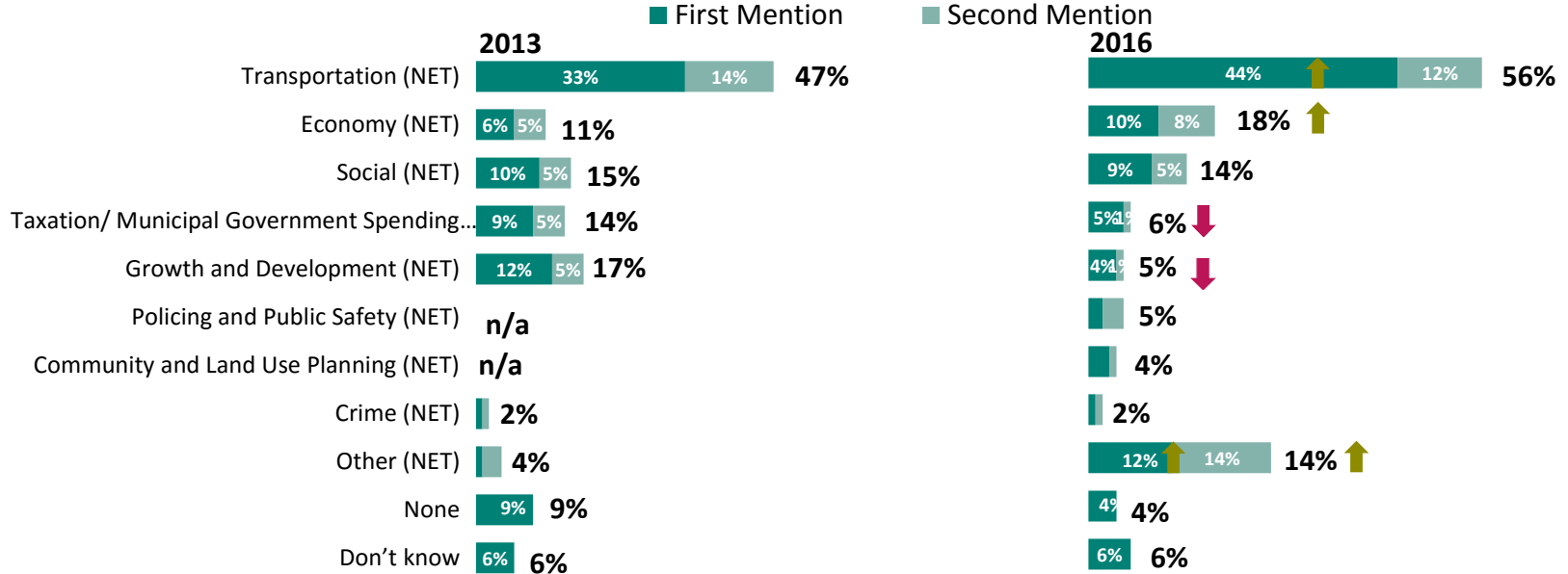
The provision of e-voting does have some positive impact on likelihood to vote.

Most (55%) residents indicate that e-voting will have no impact, but among the remaining, 38% say this would make them more likely to vote compared to only 7% who say less likely. The proportion who say more likely is higher among women than among men (48% vs. 24%) and, not surprisingly, among younger residents (64% among those aged 18 to 34, 42% among those aged 35 to 54 and 16% among those 55 and older). (see p.33)

Issue Agenda

TOP-OF-MIND COMMUNITY ISSUES

Town of Wolfville residents are most likely to focus on transportation as the most important issue facing their community (56% total mentions) with more than four in ten who cite it as their first mention. First mention of transportation is up from 2013 (44%, up from 33%). There has also been an increase in total mentions of the economy and a decline in mentions of taxation/municipal spending and growth and development.



Data <4% not labelled on graph

Q1. In your view, as a resident of the Town of Wolfville, what is the most important issue facing your community that is the one issue you feel should receive the greatest attention from your local leaders? Base: All respondents 2016 n=150; 2013 n=300

TOP-OF-MIND COMMUNITY ISSUES (cont'd)

Top mentions included under the three leading top-of-mind community issues are:

- **Transportation (56% of Total Mentions)**

- Roads/ streets 39%

- Traffic congestion 9%

- Transportation (general) 8%

- Parking 1%

- **Economy (18% of Total Mentions)**

- Economic development 9%

- Economy 9%

- **Social (14% of Total Mentions)**

- Housing/ lack of affordable housing 7%

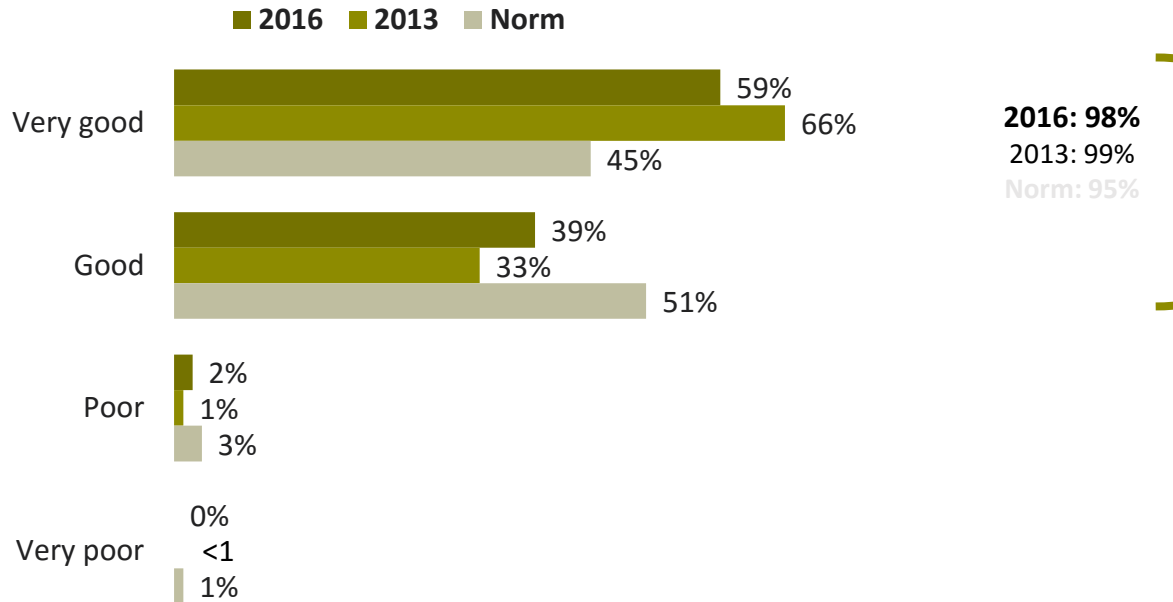
- Student issues/ relations 6%

Quality of Life

OVERALL QUALITY OF LIFE

There is an almost unanimous consensus among residents that the quality of life in Wolfville is good (98%). Among these, six in ten believe the quality of life is “very good” versus four in ten who believe it is “good.” Although perceptions of the overall quality of life remain very high, the proportion who say it is “very good” is down directionally, but not significantly, from 2013.

The overall quality of life in the Town of Wolfville is on par with the National Norm (95%), and the Town continues to score significantly higher than the National Norm in the proportion who rate it as very good (59% vs. 45%, respectively).



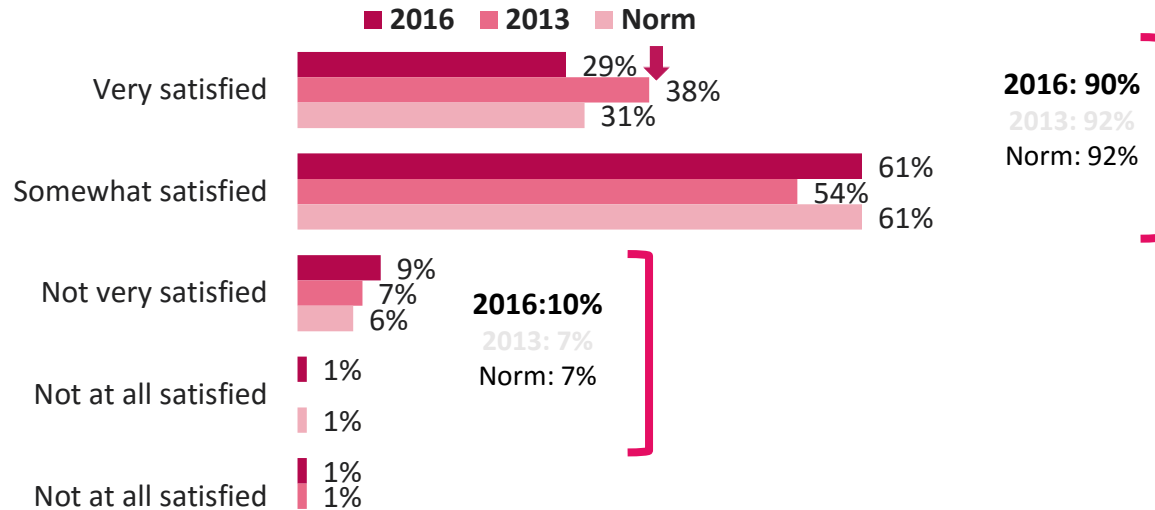
Satisfaction with Services

OVERALL SATISFACTION WITH TOWN SERVICES

An overwhelming majority of Wolfville residents are satisfied with the quality of services provided by the Town with most being somewhat satisfied (61%) and three in ten being very satisfied. Moreover, the proportion who are “very satisfied” is down significantly by nine points from 2013.

Overall satisfaction, including the proportion who are very satisfied, with the quality of Town of Wolfville services is on par with the Canadian National Norm.

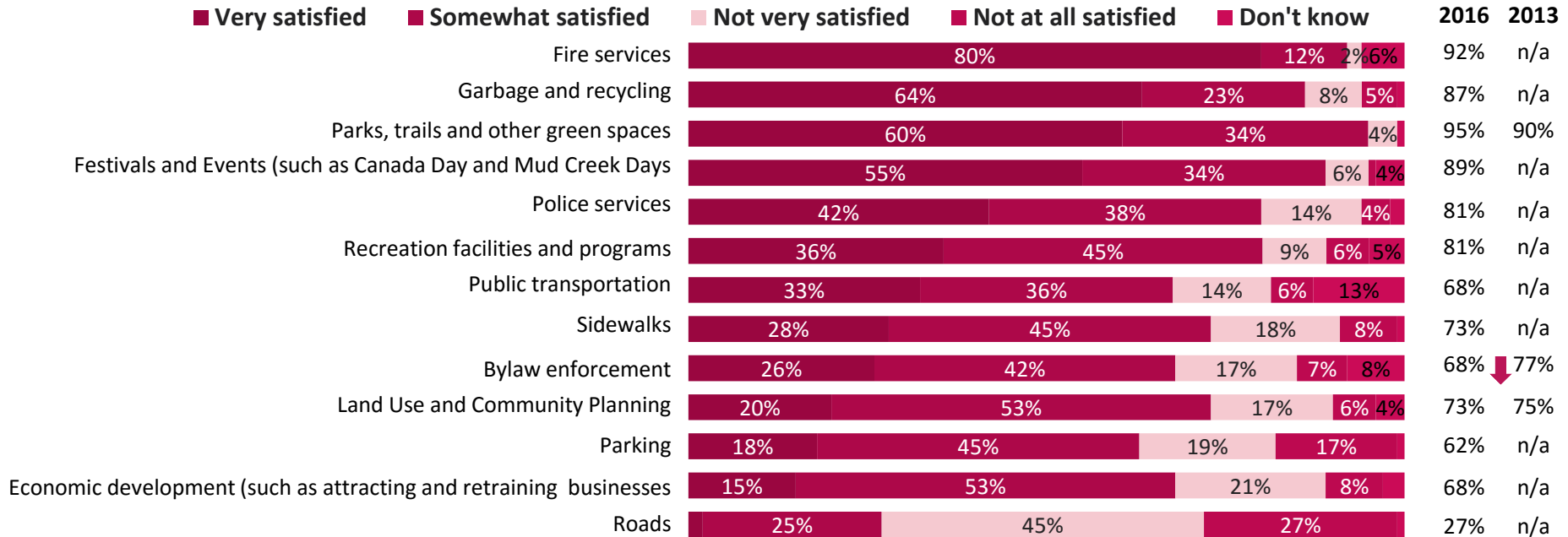
Women are significantly more likely than men to be very satisfied with Town services (36% vs. 21%).



Q6 Please tell me how satisfied you are with the overall level and quality of services provided by the Town of Wolfville on a scale of very satisfied, somewhat satisfied, not very satisfied and not at all satisfied. Base: All respondents 2016 n=150; 2013 n=300

SATISFACTION WITH INDIVIDUAL SERVICES

Overall satisfaction scores are relatively high for Town services, with the majority of residents indicating they are at least very or somewhat satisfied with 12 of 13 services tested in the survey. The Town services with the highest satisfaction scores where more than half of residents are very satisfied are: fire services, garbage and recycling, parks, trails and other green spaces and Festivals and Events. Four in ten are very satisfied with police services. The lowest score is found for roads – with fewer than two in ten satisfied with this area. Since 2013, there has been a significant decline in the proportion who are satisfied with bylaw enforcement.



Data <4% not labelled on graph

Q7 Now, please tell me how satisfied you are with the following services provided by the Town of Wolfville, using a scale of very satisfied, somewhat satisfied, not very satisfied or not at all satisfied. How satisfied are you with... Base: All respondents 2016 n=150; 2013 n=300

Gap Analysis

USING THE GAP ANALYSIS

- The Gap analysis that follows (p.20) shows the difference between how important various Town services are to residents and how satisfied they are with the services. Importance scores are plotted horizontally across the bottom of the chart (along the X-axis). Satisfaction scores are plotted vertically (along the Y-axis). Importance scores are derived from correlation analysis with overall Town service satisfaction and satisfaction scores represent overall stated satisfaction (very and somewhat) with each of the individual Town services.
- Typically, it is most advantageous to focus on improving services that are of high importance to residents but where satisfaction is relatively low. However, in some instances it can also make strategic sense to focus on lower importance items if the Town can see that a big difference can be made.

On the graph, four areas are identified:

- **Primary Areas for Improvement** – services that are considered very important, but with lower satisfaction scores. The focus here is on improving these services to increase satisfaction. This is slated as the primary area for improvement because the correlation analysis identifies that these services are the strongest drivers of satisfaction. If the Town can increase satisfaction this will have the largest impact on overall perceptions of Town services.
- **Secondary Areas for Improvement** – services that are relatively less important, with the lowest satisfaction scores. This should be the secondary area of focus to improve the satisfaction scores.
- **Primary Areas for Maintenance** – services of relatively high importance and high satisfaction. The focus here is on maintaining the current level of service and satisfaction.
- **Secondary Areas for Maintenance** – services with lower importance scores but high satisfaction scores. The focus here should be to maintain satisfaction levels.

UNDERSTANDING THE GAP ANALYSIS

PRIMARY AREAS FOR IMPROVEMENT:

There are no primary areas for improvement.

SECONDARY AREAS FOR IMPROVEMENT:

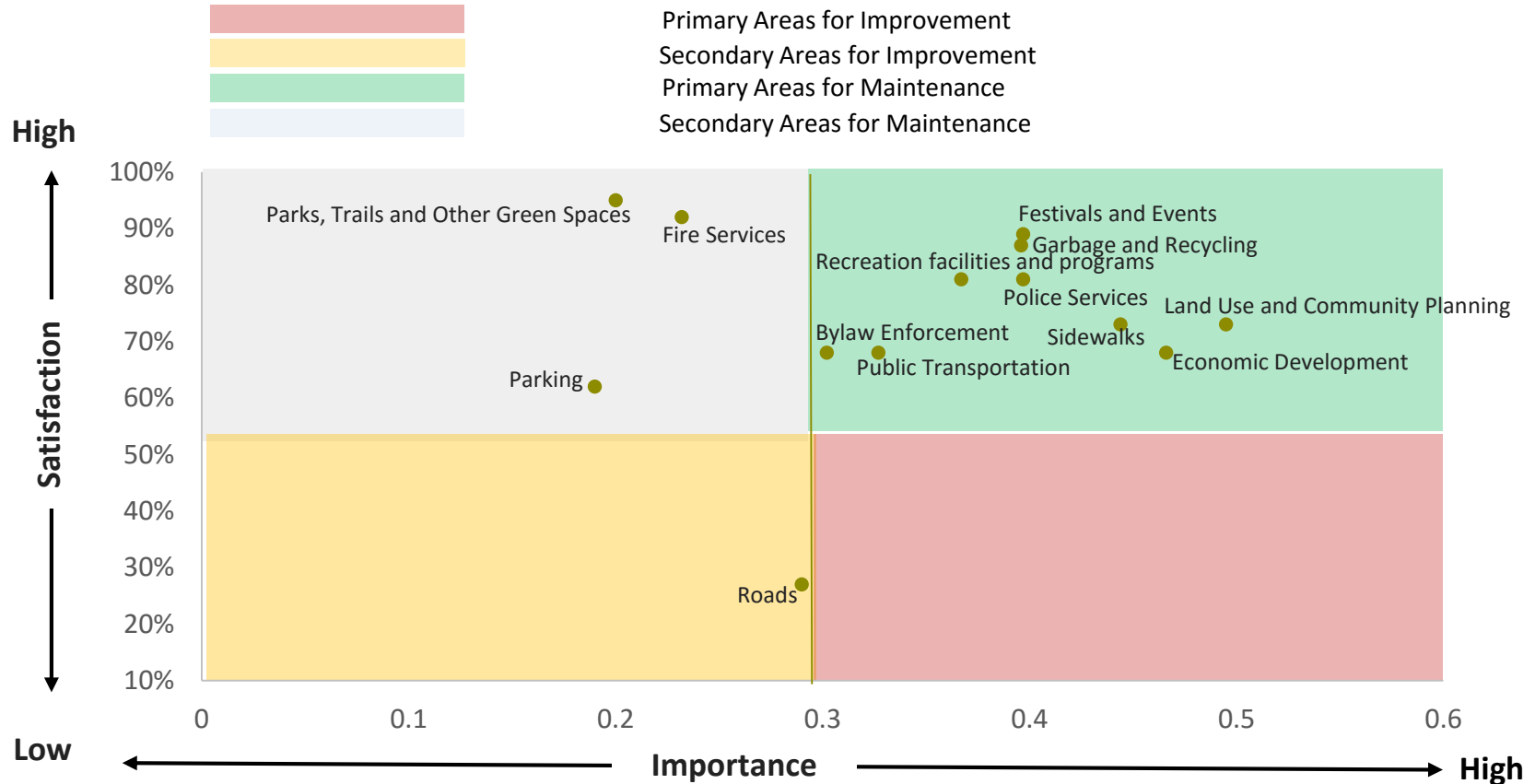
There is one secondary area for improvement, where the satisfaction level is low, but at this point correlation to overall satisfaction with Town services is low. However, if the Town does not address this area, this service area could, in the future, have a stronger negative impact on overall satisfaction with Town services.

- Roads

At this point in time, the Town of Wolfville is performing well in the areas that are impacting most positively on satisfaction with the overall level of services (listed below). Hence, it should maintain its level of performance in these areas.

• Land use and community planning	• Economic development	• Sidewalks	• Festivals and events	• Police services
• Garbage and recycling	• Recreation facilities and programs	• Public transportation	• Bylaw enforcement	

GAP ANALYSIS

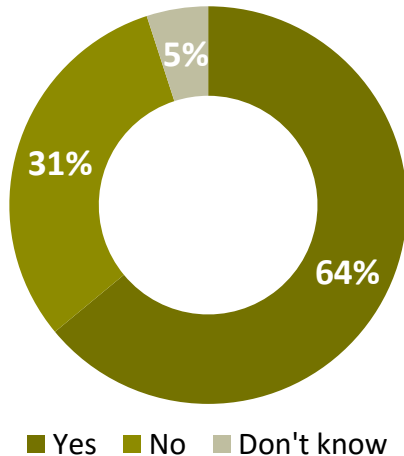


Police Resourcing

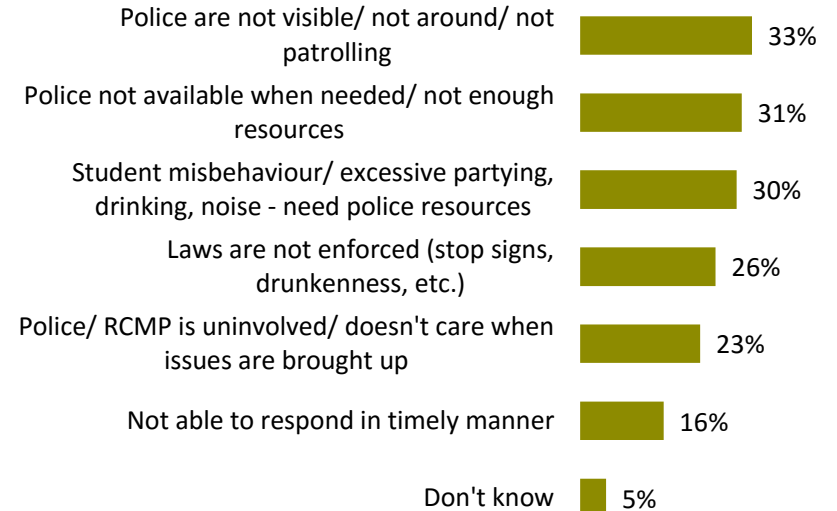
POLICE RESOURCING

Two-thirds of residents think there is sufficient police resourcing in Wolfville, while three in ten disagree. Among those who do not think police resourcing is sufficient, the most common reasons are that the police are not visible, around or patrolling, not available when needed and because of student misbehaviour, excessive partying, drinking and noise.

Is there sufficient police resourcing in Wolfville?



Why are resources not sufficient?



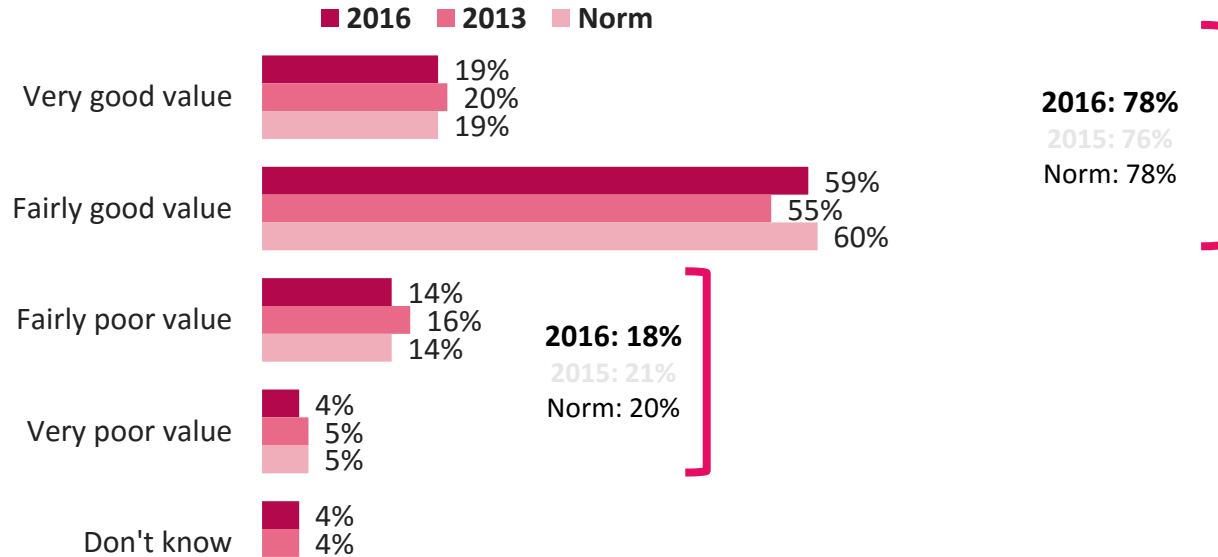
Q8. Do you think there is sufficient police resourcing in Wolfville? Base: All respondents 2016 n=150

Q9. Why not? Base: Those who do not think there is sufficient police resourcing in Wolfville 2016 n=39* *Small sample*

Financial Planning

VALUE FOR TAXES

Eight in ten residents believe that the value for tax dollars based on the programs and services they receive from the Town of Wolfville is at least good, including two in ten who believe it is very good. These figures are similar to those recorded in 2013. The perceived value for tax dollars for the Town of Wolfville is on par with the National Norm.



Q10. Thinking about all the programs and services you receive from the Town of Wolfville, would you say that overall you get good value or poor value for your tax dollars? Base: All respondents 2016 n=150

Communication

PREFERRED METHODS OF COMMUNICATION

Email (44%) continues to be seen as the best method for the Town of Wolfville to communicate information to them, and this proportion is up 13 points from 2013. Smaller, but sizeable proportions prefer mail outs and bill inserts or newspaper or Grapevine. Since 2013, there have been increases of five points in preference for telephone and 10 points in mention of social media, but declines in mentions of the Town website (down 12 points) and a e-newsletter/ pamphlet/ flyer/ brochure (down 20 points).

	2013	2016
Email	31%	44% ↑
Mail outs and bill inserts	24%	31%
Newspaper or Grapevine	12%	18%
Telephone	5%	10% ↑
Town website	21%	9% ↓
E-newsletter*/ pamphlet/ flyer/ brochure	28%	8% ↓
Social media (general)	5%	6%
Internet (unspecified)	9%	5%
Facebook	n/a	5%
City meetings including Council meetings, Advisory committees, etc.	3%	4%
Posters	3%	4%
Radio	5%	4%
Twitter	n/a	3%
Other	3%	5%
None/ nothing	2%	2%
Don't know	2%	2%

*D*Newsletter in 2013*

Data <2% not labelled on graph

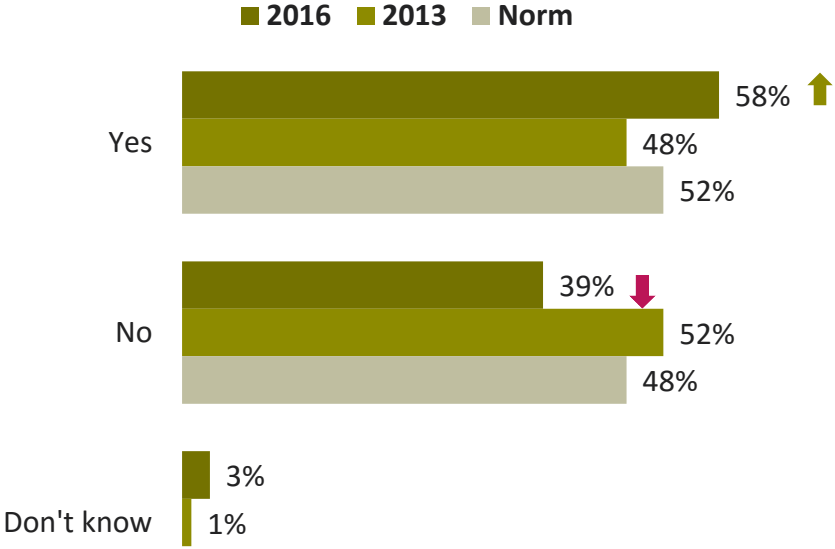
Q12. What methods would be best for the Town of Wolfville to communicate information to you? Any others? Base: All respondents 2016 (n=150); 2013 (n=300)

Customer Service

CONTACT WITH TOWN OF WOLFVILLE IN LAST 12 MONTHS

Six in ten residents indicate that they had personally contacted the Town of Wolfville or dealt with one of its employees in the last 12 months. This figure is up 10 points from 2013. This figure is directionally higher than the National Norm.

Men are significantly more likely than women to have contacted the Town in the last 12 months (68% vs. 50%).



Q17. In the last 12 months, have you personally contacted or dealt with the Town of Wolfville or one of its employees? Base: All respondents 2016 (n=150); 2013 (n=300)

REASON FOR CONTACTING MUNICIPALITY

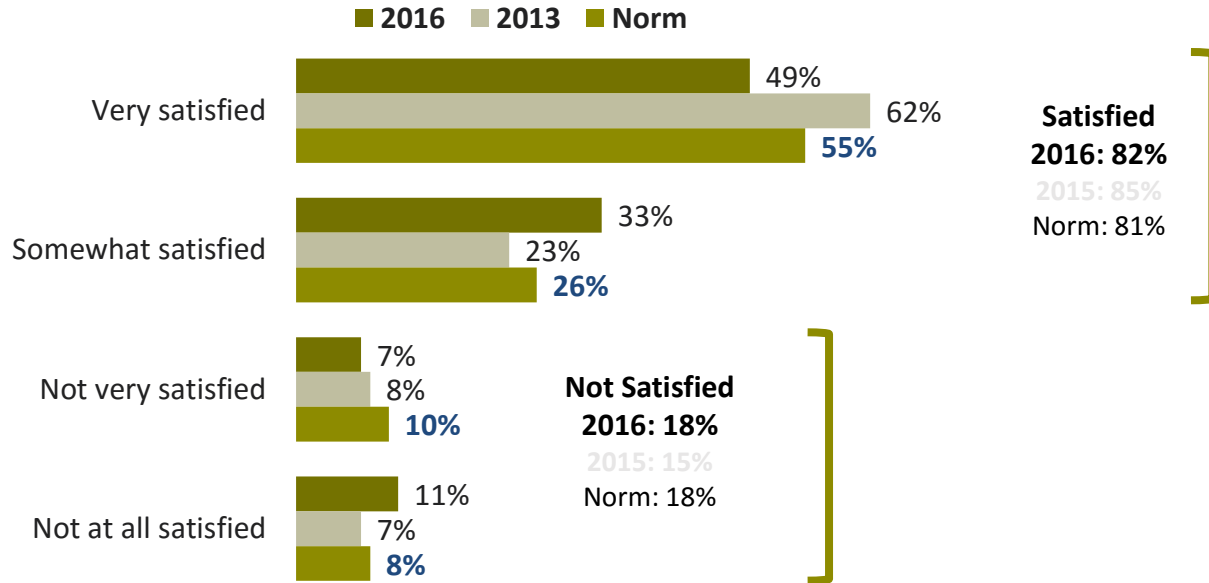
Those who contacted the Town in the last 12 months mention a number of reasons for contacting the Town. The most commonly mentioned are: planning & development information and bylaws. Fewer residents called to discuss or pay a bill or discuss or pay property taxes and more called to report an unsafe sidewalk or for building or fire inspections. A greater number mentioned some other reason.

	2013	2016
Planning & Development information	9%	11%
Bylaws	6%	10%
Water issues	4%	8%
Discuss/ pay bill	16%	7% ↓
Road repair/ maintenance	7%	7%
General information	4%	6%
Unsafe sidewalks	-	4% ↑
Discuss/ pay property taxes	14%	4% ↓
Parks and recreation (incl. register program, obtain information)	8%	4%
Dog licenses	2%	4%
Building/ fire inspections	-	3% ↑
Obtain permits	5%	3%
Real estate/ moving information	2%	2%
Law enforcement (incl. contact police, report a crime)	3%	2%
Garbage services/ schedule	6%	2%
Other	7%	21% ↑
Don't know	3%	3%

Q18. What was the main reason you contacted the Town of Wolfville? Base: Contacted the Town of Wolfville in last 12 months 2016 (n=88); 2013 (n=152)

SATISFACTION WITH OVERALL SERVICE RECEIVED

Eight in ten residents who had contact with the Town were satisfied with the overall service that they received – half of which were very satisfied. Although overall satisfaction with services is similar to that recorded in 2013, the proportion who were very satisfied is down directionally. However, it should be noted that negative ratings have not gone up, but residents have become more muted in their satisfaction and are directionally more likely to say they are only “somewhat satisfied.” Satisfaction is on par with the National Norm.



Q20 How satisfied are you with the overall service you received? Would you say very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied? Base: Contacted the Town of Wolfville in last 12 months 2016 (n=88); 2013 (n=152)

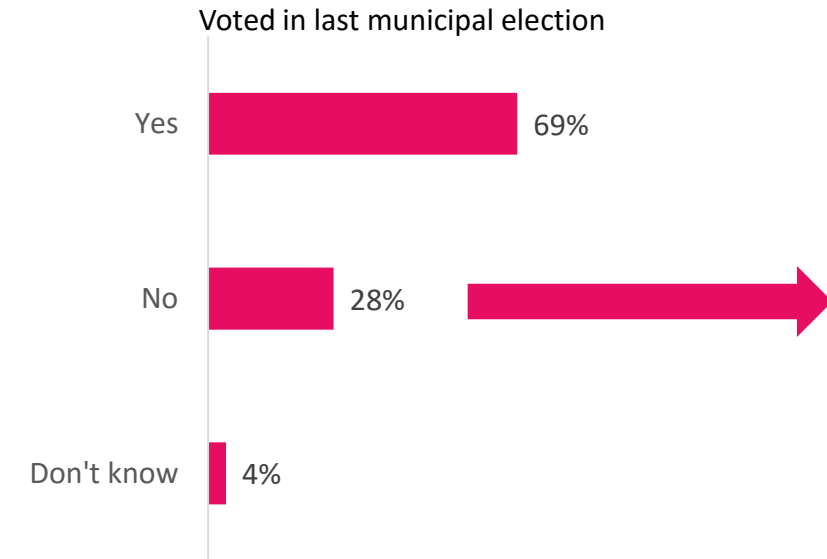
Municipal Election

2012 MUNICIPAL ELECTION

Seven in ten residents report voting in the last municipal election in 2012. This figure is significantly lower among younger residents (46% among those aged 18 to 34, 83% among those aged 35 to 54 and 79% among those aged 55 and older).

It should be noted that voting questions always produce a much higher level of reported voting than actual voter participation, as many people are reluctant to say they did not perform their civic duty.

Among those who did not vote, the main reasons for not voting are not being or not thinking they were eligible to vote and didn't live in Wolfville at the time.



Q13. Did you vote in the last municipal election in 2012? Base: All respondents 2016 (n=150)

Q14. What is the one main reason that you did not vote? Base: Those who did not vote in the 2012 municipal election 2016 (n=35**)

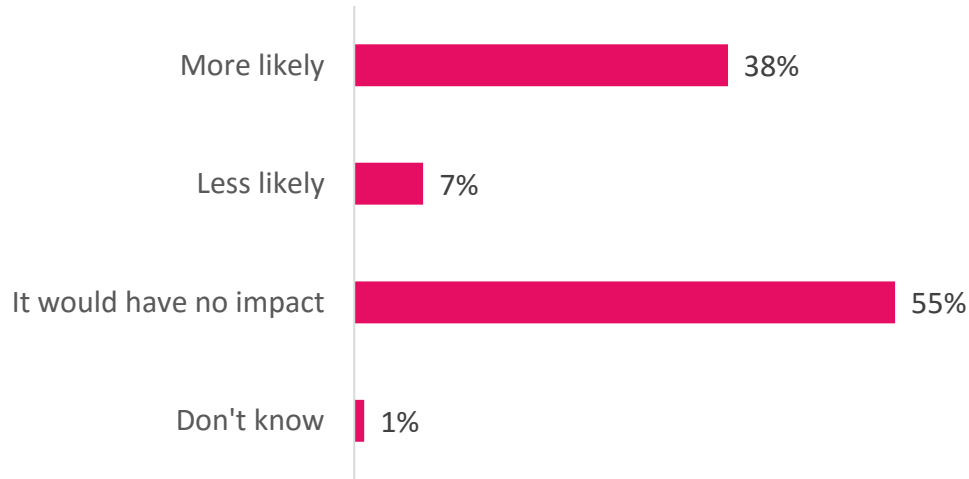
Main reason for <u>not</u> voting	2016
Not eligible/ didn't think I was eligible	22%
Didn't live in Wolfville at the time	20%
Was not old enough	11%
Don't follow politics	5%
Forgot about it/ couldn't remember voting date	5%
Too busy/ no time	3%
Didn't know who to vote for/ didn't know enough about the candidates	3%
Didn't think my vote would make a difference	2%
Don't like/ trust politicians	2%
Was sick/ in poor health	2%
Did not receive voter card	2%
Other	24%

Data <2% not labelled on graph

IMPACT OF E-VOTING ON LIKELIHOOD TO VOTE

More than half of Town of Wolfville residents indicate that if the Town offered e-voting, this would have no impact on whether they vote. Among the remaining who say it would make a difference, four in ten indicate that it would make them more likely to vote, while just under one in ten say it would make them less likely to do this.

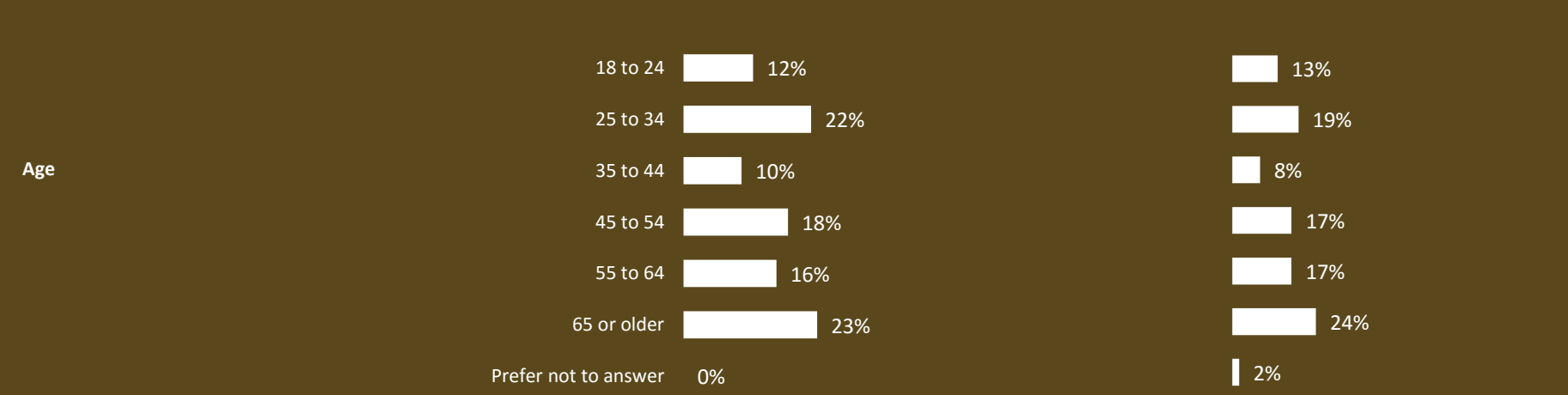
Women are twice as likely as men to indicate that e-voting would make them more likely to vote (48% vs. 24%), while men are significantly more likely than women to say e-voting would have no impact on their likelihood to vote (68% vs. 45%). Younger residents are significantly more likely than older residents to indicate that e-voting would make them more likely to vote (64% among those aged 18 to 34, 42% among those aged 35 to 54 and 16% among those aged 55 and older).



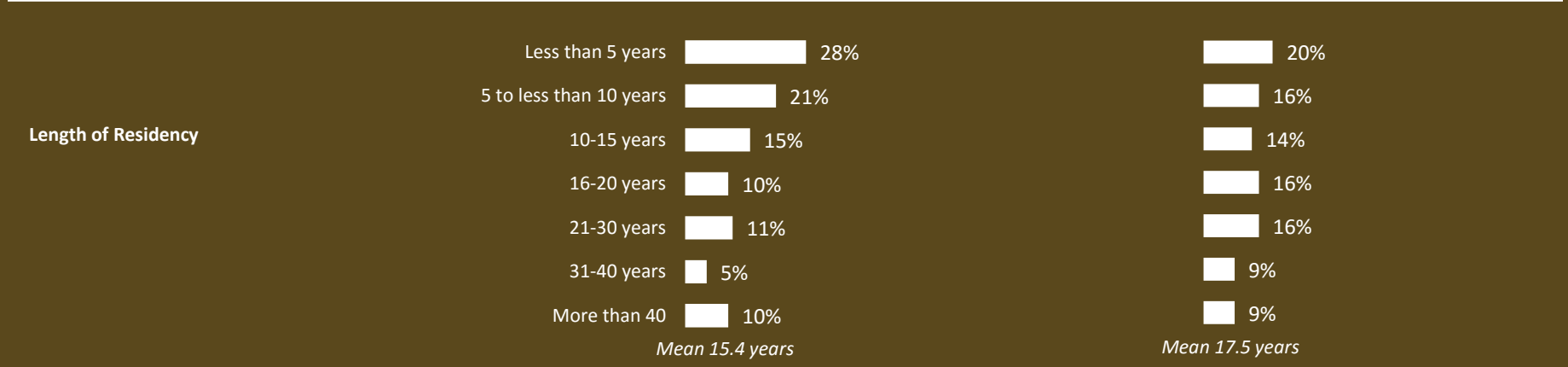
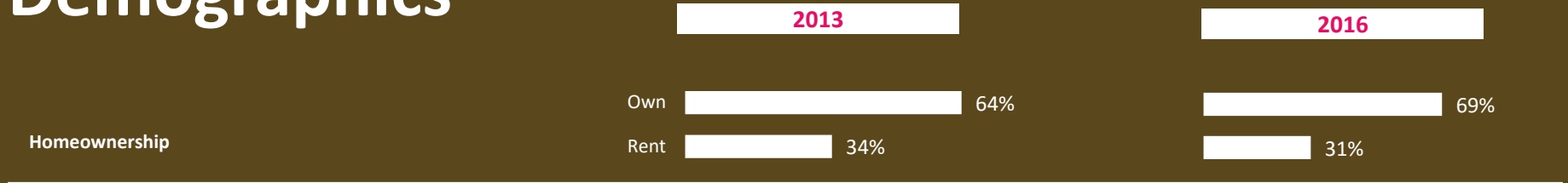
Q15. If the Town offered e-voting, would you be more or less likely to vote or would it have no impact on whether you vote?
Base: All respondents 2016 (n=150)

Sample Composition

Demographics



Demographics



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GAME CHANGERS

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We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

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