

2017 Citizen Satisfaction Survey

CITY OF LEDUC
FINAL REPORT
FEBRUARY 9, 2017

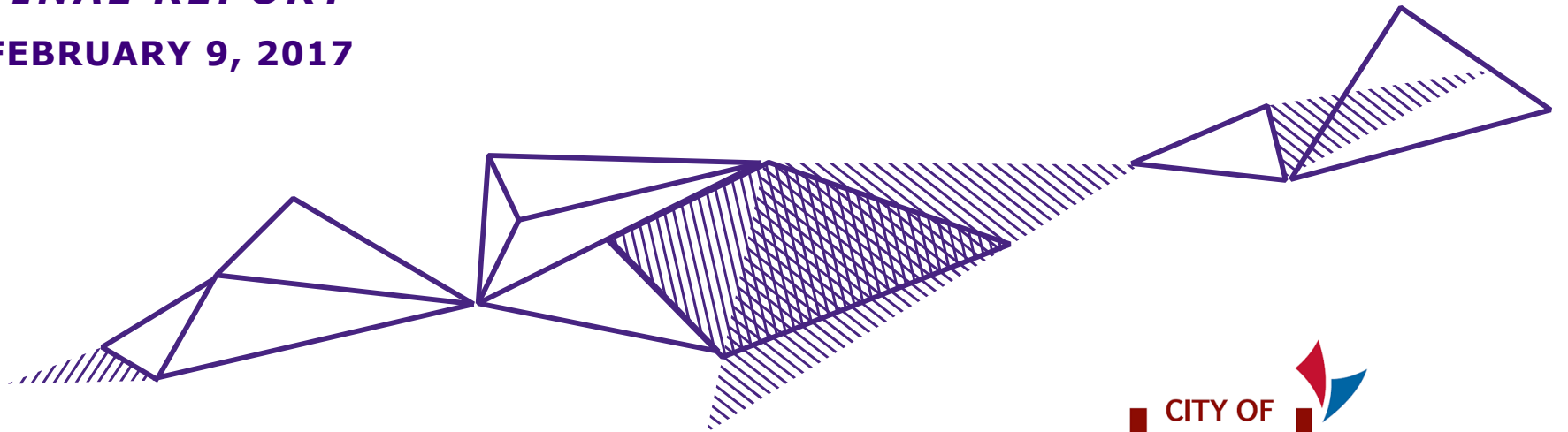


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EXECUTIVE SUMMARY CIVIC OUTLOOK

Quality of Life and Civic Outlook

- One-quarter of Leduc residents continue to describe their overall quality of life as being excellent, with an additional 50 percent indicating it is very good. As was the case in previous years, recreation and lifestyle amenities are among the items perceived to be most likely to contribute to a high quality of life in Leduc. Traffic congestion, street cleaning, crime/public safety and taxation are the factors residents are most likely to cite as detracting from their overall quality of life.
- Slightly more than four in ten Leduc residents would be very likely to recommend their city as a place to live. The percentage of residents who promote Leduc as a place to live is down slightly compared to 2015.
 - There is a positive correlation between residents' satisfaction with City-produced community events, sports fields/outdoor rinks and bylaw enforcement and their likelihood of recommending Leduc as a place to live.
- When asked to identify which priorities council should focus on, managing growth is once again identified as the most important civic issue, followed by dealing with the City of Edmonton's annexation proposal. Older and middle aged adults are more likely to want the City to focus on keeping taxes low and road maintenance, with younger adults less likely to be concerned about these two issues.
- Nearly nine in ten city residents believe the City is currently on the right track, with fewer than one in ten believing that things are not going well in Leduc.

EXECUTIVE SUMMARY **SATISFACTION WITH SERVICES**

Satisfaction With City Services

- Overall, four in five residents continue to be at least somewhat satisfied with City services, with one quarter very satisfied.
- Leduc residents remain most likely to be satisfied with civic recreation facilities and amenities. Satisfaction with emergency services has increased significantly since the last sounding in 2015, but today residents are less satisfied with contracted police services, water and sewer services and City-organized community events. LATS and Leduc Transit achieved the lowest satisfaction scores, with only about three in ten residents indicating they are happy with these two services.
 - A driver analysis shows that of the different services analyzed, satisfaction with the Leduc Recreation Centre and other recreation facilities is the most important driver of overall satisfaction with services. Satisfaction with community events, arts/cultural programs, beautification of public property, bylaw enforcement and property assessment also have a significant bearing on citizens' overall satisfaction with City services.
 - A comparison of derived importance and satisfaction with specific services reveals that arts and cultural programs, City-sponsored community events, bylaw enforcement and property assessment are critical areas where improving lower-than-average satisfaction scores may lead to an overall improvement in how citizens rate City services.
- One in five residents also believe City services have improved during the past year, which represents a slight increase from 2015 (+5%). Those who are not currently working – as well as long-term residents and those with no children at home – are less likely to credit the City for improving services within the past year.
- Among the four in five Leduc residents who have accessed City services in the past year, respondents are most likely to agree that City staff were polite and knowledgeable. They also expressed high levels of satisfaction with the timeliness of the service and the ability of staff to deal with their issue effectively.

EXECUTIVE SUMMARY ADDITIONAL AREAS

Communications

- One half of Leduc residents continue to be at least somewhat satisfied with how often the City communicates with them, with a similar proportion satisfied with the quality of communications coming from the City. Satisfaction with the quality and frequency of City communications is slightly lower today compared to 2015.
- The *Leduc Representative* is the most preferred source of information about the City for Leduc residents, followed by the City website and email. Older adults are more likely to prefer the newspaper while younger adults are more likely to embrace electronic forms of communication.
- Six in ten residents have visited the City of Leduc website within the past six months. Slightly fewer website users are at least somewhat satisfied with the experience compared to 2015.

Waste/Recycling Services

- Four in five residents report using curbside waste, recycling and organic collection services in the past year, with two thirds of residents using the Eco-Station, one half using yard waste drop off stations and one quarter participating in the toxic round up.
- The majority of waste and recycling service users tend to offer very positive assessments of these specific offerings, with more than eight in ten expressing satisfaction with the yard waste drop off station, the Eco-Station, curbside blue bag recycling and toxic materials collection. Satisfaction scores are slightly lower for curbside organic collection and waste collection, yet four in five residents remain happy with these services.

Annexation

- Awareness of the City of Edmonton's annexation proposal and the City-Leduc County airport tax-sharing agreement is lower among Leduc residents today compared to 2015. Although the vast majority of Leduc residents continue to oppose the Edmonton annexation proposal, opposition to the deal is less firm today than it was two years ago.

INTRODUCTION AND METHODOLOGY

Since 2010, the City of Leduc has conducted a citizen satisfaction survey to measure the perceptions and opinions of Leduc residents regarding topics such as satisfaction with city services, overall quality of life and city communications. For the 2017 study, Environics Research was commissioned by the City to conduct a telephone survey of adult residents regarding these topics and others.

A total of n=400 Leduc residents aged 18 years and over were interviewed by telephone between January 9th and 20th, 2017. The sample included both landlines and cellphone numbers. The final results in this survey are weighted by age, gender and area of Leduc to reflect the known of the City's adult population based on the results of the 2011 National Household Survey and the City of Leduc's annual municipal census.

The margin-of-error for a telephone survey of n=400 adults is +/- 4.9%, 19 times out 20. The margin-of-error is higher for sub-populations analyzed in these results.

Where applicable, this report compares the results of the 2017 survey with the results of previous citizen satisfaction surveys conducted in 2010, 2012, 2013 and 2015. For Question 7 regarding satisfaction with different City services, several categories from past years were either removed or combined to shorten the length of the survey. Changes to question wording and information regarding how this effects year-over-year tracking are noted throughout this report.

NB: The percentages shown in this report may not add up to exactly 100% due to rounding.

WEIGHTED SURVEY PROFILE

GENDER



	Survey	2016 Census
Male	49	50
Female	51	50

LENGTH OF TIME IN LEDUC

	Survey
Less than 10 years	35
10-19 years	29
20+ years	35



AGE DISTRIBUTION

	18-34	35-54	55+
Survey	35	36	29
2016 Census	32	38	32

AREA

	Survey	2016 Census
West of Highway 2	54	54
East of Highway 2	46	46

HOME OWNERSHIP



	Survey	2011 NHS
Own	89	74
Rent/Other	11	26



EMPLOYMENT STATUS

	Survey	2011 NHS
Working full-time	52	72
Working part-time	14	
Unemployed	5	4
Retired	19	24
Stay-at-home	5	
Student	4	

HOUSEHOLD INCOME



	Survey	2011 NHS
<\$50,000	16	25
\$50,000-\$100,000	37	32
\$100,000-\$150,000	26	26
\$150,000-\$200,000	11	17
\$200,000+	12	

Data sources include the 2011 National Household Survey (NHS) and 2016 Leduc Municipal Census.

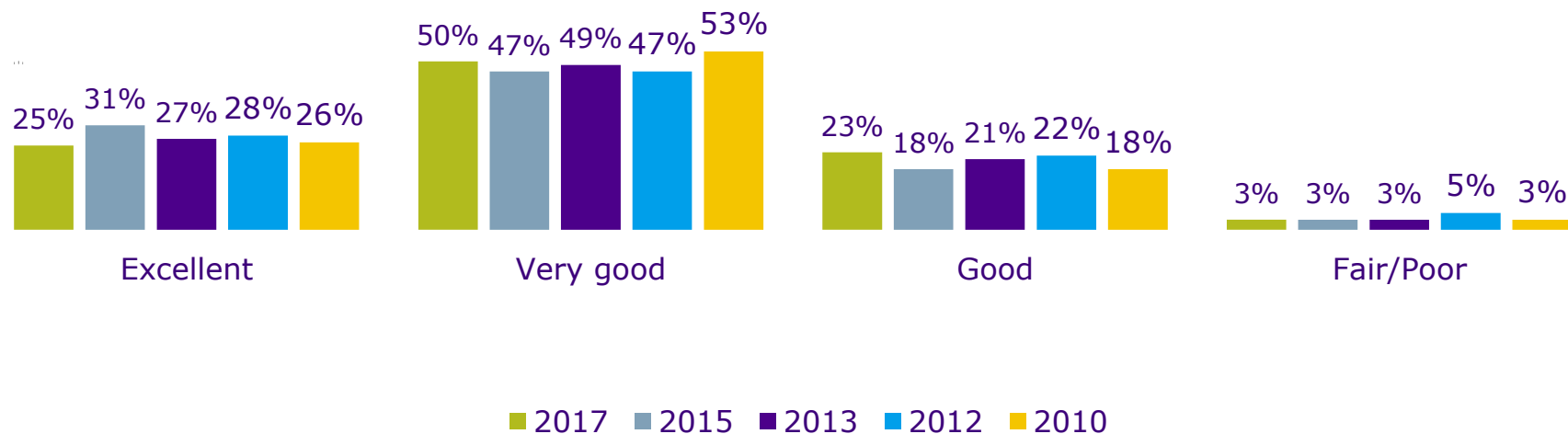


Quality of Life and Community Direction

QUALITY OF LIFE IN LEDUC

One-quarter feel their quality of life is excellent, with almost

98% excellent/very good/good (+2% vs. 2015)



Those with children in the household were more likely to describe their quality of life in Leduc as being excellent (36% vs. 18% among those with no children at home).

Q1 In general, how would you rate the quality of life in the City of Leduc?

FACTORS CONTRIBUTING TO HIGH QUALITY OF LIFE

Recreation and lifestyle amenities are among the items most likely to contribute to a high quality of life in Leduc

-  **1. Recreation Facilities/Leduc Recreation Centre**
35% +3% vs. 2015
-  **2. Parks/multi-way path system** ← **More likely to be mentioned by homeowners (27% vs. 13% among renters)**
25% +5% (significant change)
-  **3. Leduc has everything you need/all amenities**
25% +8% (significant change)
-  **4. Good services**
24% +13% (significant change)
-  **5. Location/close to Edmonton Airport/Nisku**
23% -4%
-  **6. Size/is small** ← **The size of the community is less likely to be mentioned by younger adults (11% among those 18-34 vs. 28% among those 35-54 and 26% among those 55+)**
22% -3%

Q2 In your opinion, what would you say are the three most significant factors contributing to a high quality of life in the City of Leduc?

FACTORS CONTRIBUTING TO LOW QUALITY OF LIFE

Traffic congestion, street cleaning and taxation are the factors most likely to be cited as detracting from quality of life



1. Traffic congestion*

14%

**NB: Previous surveys combined traffic congestion and speeding (24% in 2015). In 2017 survey, speeding was 4%*



2. Snow removal/street cleaning

12% +2%



T3. High taxes

12% -1%



T3. Crime/drugs/vandalism/public safety

12% +1%



5. City planning/land development

10%



6. Infrastructure problems

8%



T7. Lack of variety of businesses/shopping/restaurants

6% -5% (significant change)



T7. Noisy/airplane noise/traffic noise

6% -4%

Q3 And, what would you say are the three most significant factors contributing to a low quality of life in the City of Leduc?

LOW QUALITY OF LIFE FACTORS VARIATIONS AMONG SUB-GROUPS

Snow removal and street clearing is more likely to be an issue among younger, newer Leduc residents.



Snow Removal/Street Clearing

This was a significant complaint among many groups, including:

- Younger adults (24%)
- Those living west of Highway 2 (16% vs. 8% east of the highway)
- Shorter-term residents (18% who have lived less than 10 years)
- Those who are not currently employed (38%)



Crime/drugs/vandalism/public safety

This is a consistent concern across the community, but it is slightly more likely to be mentioned by those who have lived in Leduc for 10-19 years (22% vs. 5% among those living in Leduc for 20+ years).



High Taxes

This issue was less likely to be mentioned by younger adults (3% vs. 19% among those 35-54 and 14% of those 55+), as well as those who feel Leduc is on the wrong track (35%)



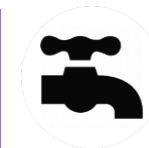
City Planning/Land Development

Higher among long-time Leduc residents (16% among those in the community for 20+ years) and those earning \$50,000-\$100,000/year (15%)



Traffic Congestion

Most likely to be mentioned by those with no children at home (17%), but otherwise this is consistently one of the top issues among Leduc residents.



Infrastructure problems

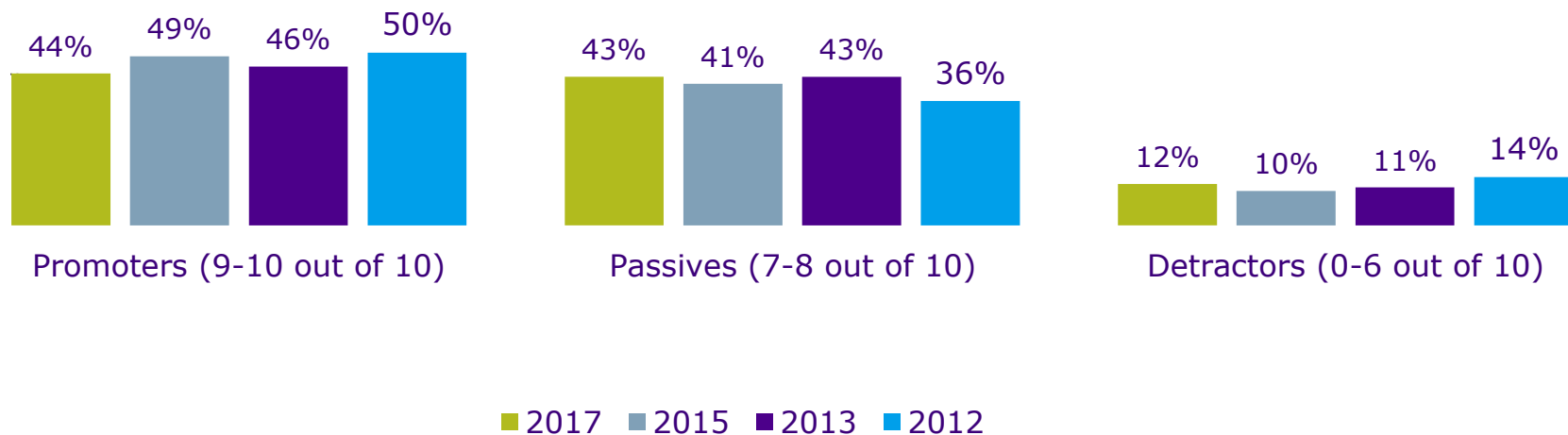
Higher among men (12% vs. 4% among women)

Q3 And, what would you say are the three most significant factors contributing to a low quality of life in the City of Leduc?

LIKELIHOOD OF RECOMMENDING LEDUC

Slightly more than four in ten residents would be very likely to recommend Lecuc as a place to live

2016 Net Promoter Score*: +32 (-7 vs. 2015)



The likelihood of recommending Lecuc as a place to live is consistent across all demographic groups, with those who are most satisfied with City services, believe Lecuc is on the right track and who say they have an excellent quality of life most likely to say they would encourage others to move to Lecuc.

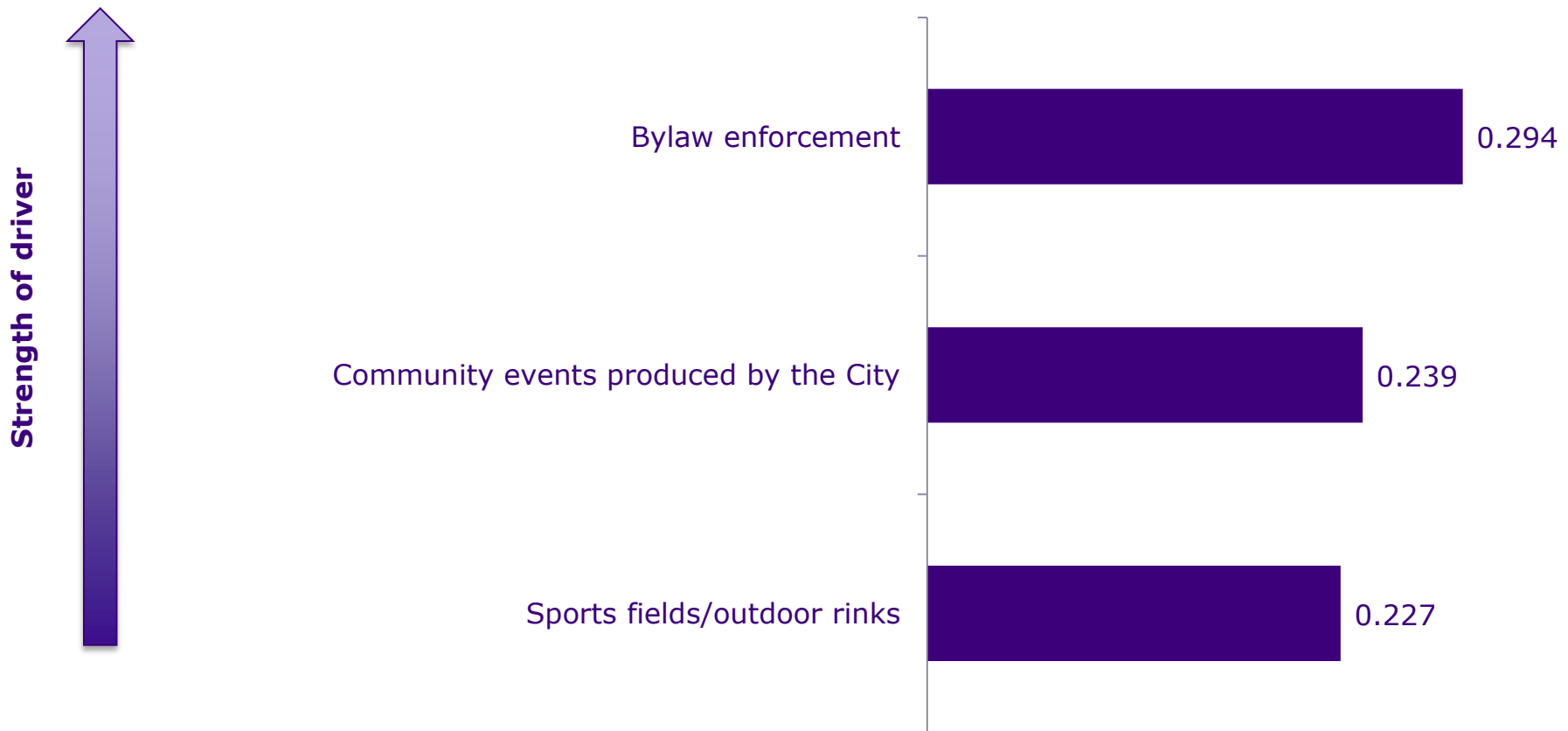
Q4 On a scale of 0 to 10, where 0 means not at all likely and 10 means extremely likely, how likely are you to recommend Lecuc as a place to live to friends or family?

***NB: Net Promoter Score (NPS) is an index calculated by subtracting the proportion of Detractors (0-6) from the proportion of Promoters (9-10).**

FACTORS INFLUENCING LIKELIHOOD OF RECOMMENDING LEDUC

Satisfaction with bylaw enforcement, community events and outdoor facilities impacts likelihood of recommending Leduc.

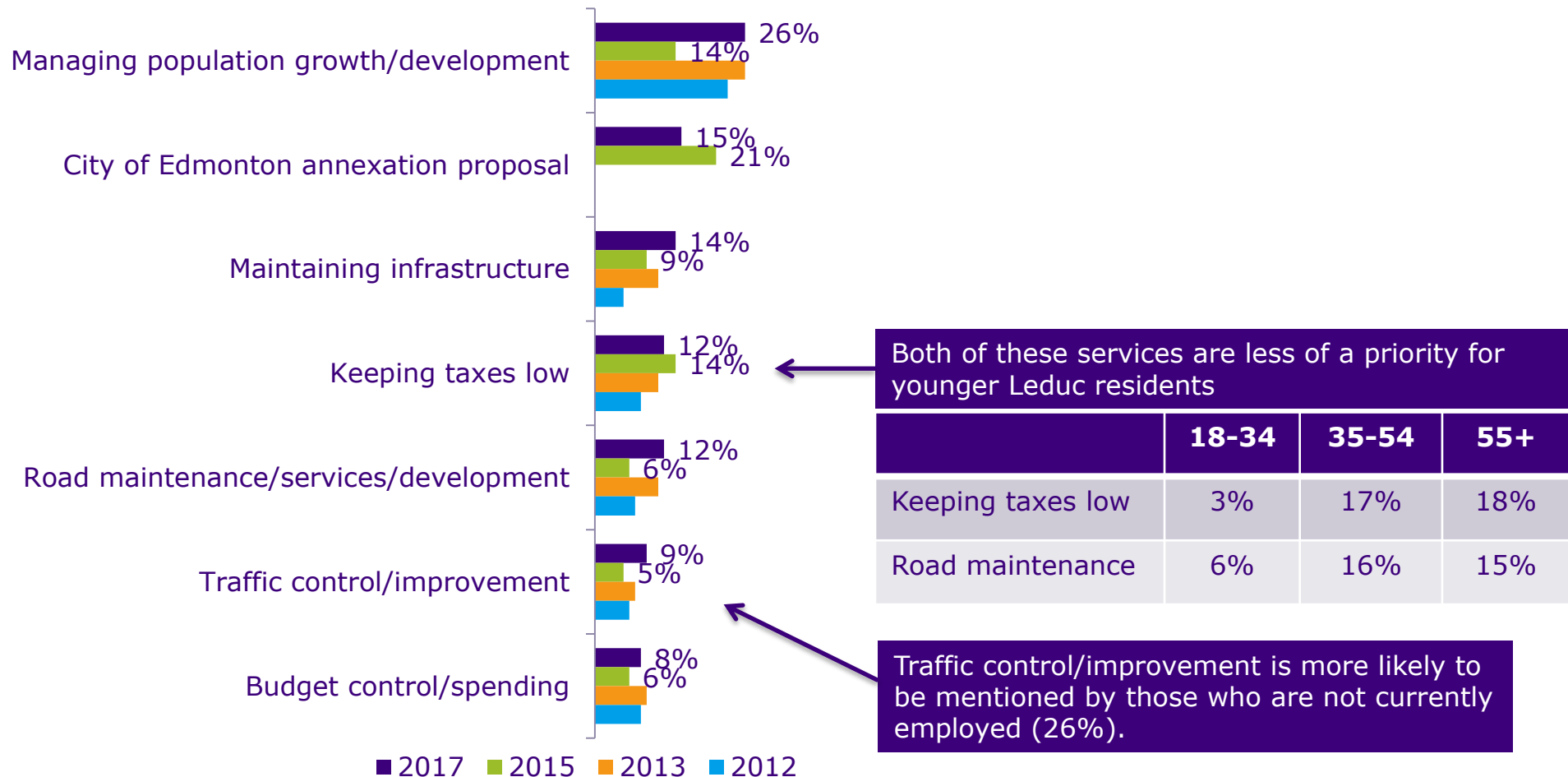
Significant Drivers of the Likelihood of Recommending Leduc (Beta Scores*)



**Total model R2 score of .363 with overall significance at the 95% level of confidence (p<.05)*

MOST IMPORTANT CIVIC PRIORITIES

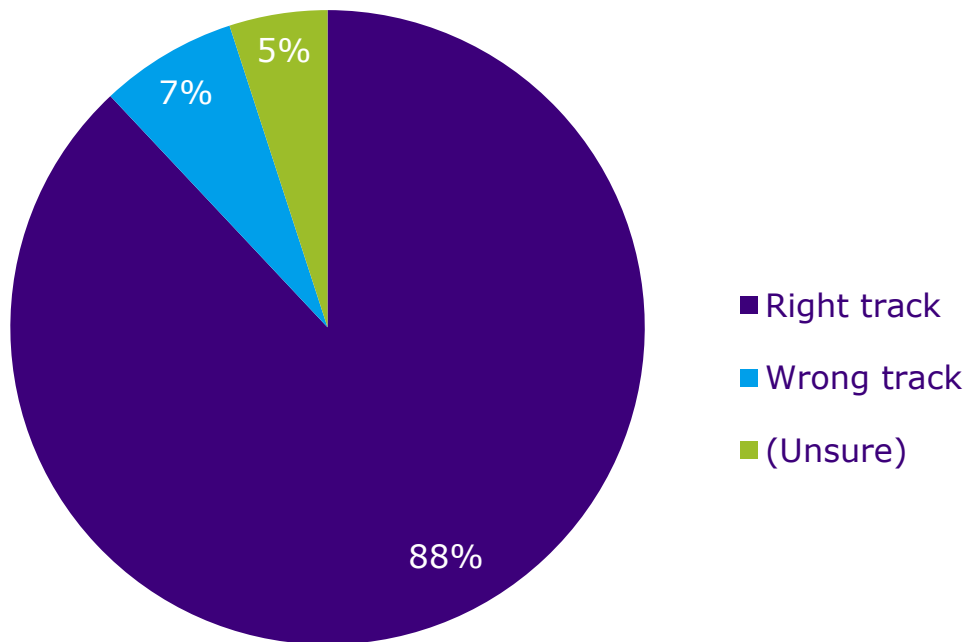
Managing growth is once again identified as the most important civic priority, followed by dealing with the annexation proposal



Q5 Thinking about the City of Leduc, what would you say are the most important priorities facing the City of Leduc Council today?

IS LEDUC ON THE RIGHT OR WRONG TRACK?

Nearly nine in ten city residents believe the City is currently on the right track



Those who are slightly less likely to say that Leduc is on the right track include:

- Those earning \$50K-\$100K/year (9% say the City is on the wrong track)
- Those who are less satisfied with City services, less likely to recommend their community as a place to live and who believe they have a less desirable quality of life.

Q6 Overall, would you say that the City of Leduc is on the right track, or the wrong track?



Satisfaction With City Services

EVALUATION OF CITY SERVICES TOP RATED SERVICES

Recreation facilities and amenities are the City services residents are most likely to be satisfied with



1. Leduc Recreation Centre/other recreation centres
88% +1% change from 2015



2. Parks, playgrounds and trails*
87% +1%



3. Beautification of public property (tree/flower planting)
81% +4%



4. Fire response services
80% -1%



5. Public library
79% +4%



6. Recreational programs
76% -1%

Q7 How satisfied are you with the following city services?
NB: Includes those who are very/somewhat satisfied

**In past surveys, parks and playgrounds and multi-way trails were asked separately. The results of these two items in 2015 were averaged out to 86%.*

EVALUATION OF CITY SERVICES MID-RATED SERVICES

Satisfaction with emergency services increased, but residents are less satisfied with policing, water/sewer and community events



T7. Sports fields and outdoor rinks

75% no change



T7. Contracted police services (RCMP)

75% -4%



T7. Emergency medical services

75% +7%



10. Water and sewer services

72% -6%



11. City-produced community events

66% -4%



12. Road maintenance**

63% -1%

***In past surveys, summer and winter road maintenance were asked separately. The results of these two items in 2015 were averaged out to 62%.*

Q7 How satisfied are you with the following city services?
NB: Includes those who are very/somewhat satisfied

EVALUATION OF CITY SERVICES LOWER-RATED SERVICES

Of all of the rated services, LATS and Leduc Transit have the lowest satisfaction scores



13. Arts, culture and heritage programs

50% +3%



14. Bylaw enforcement

48% +5% (significant change)



15. Property assessment

38% +1%



16. Leduc Assisted Transportation Service***

35%



17. Leduc Transit***

30%

Q7 How satisfied are you with the following city services?

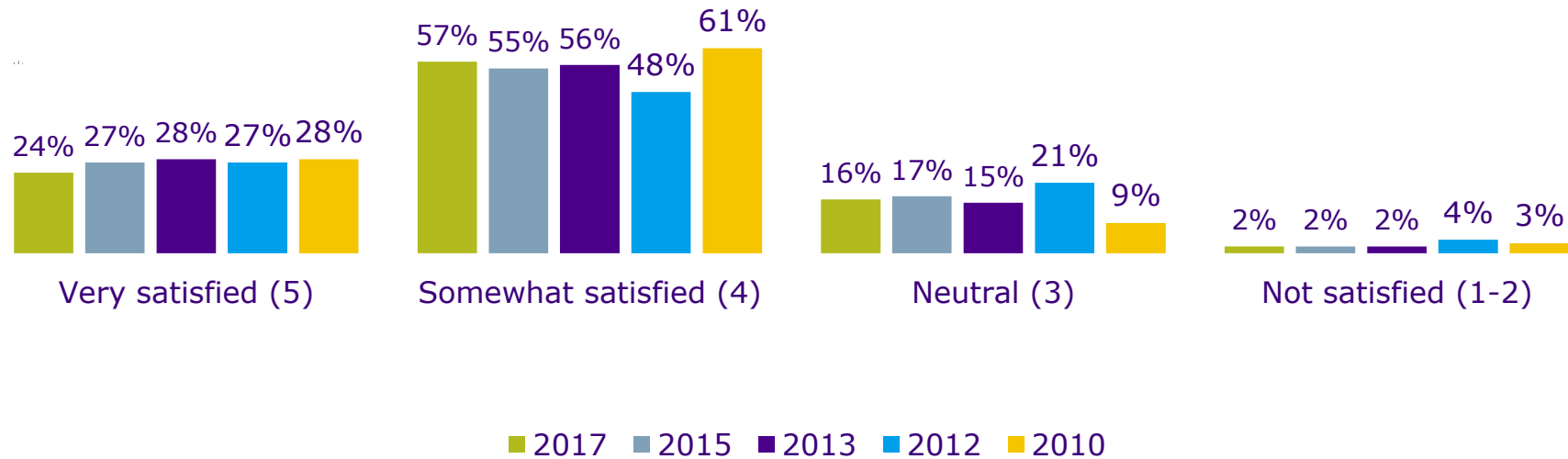
NB: Includes those who are very/somewhat satisfied

****In previous surveys, Leduc Transit and LATS were combined into a single item. The combined satisfaction score for these two services in 2015 was 44%.*

OVERALL SATISFACTION WITH CITY SERVICES

Four in five residents continue to be at least somewhat satisfied with City services, with one quarter very satisfied

Top-2*: 81% (-1%)



- Those aged 35-54 are less likely to be “very satisfied” with City services (17% vs. 29% among those 18-34 and 28% among those 55+)
- Renters (53%) are more likely than homeowners (21%) to be very satisfied with City services.

Q9 Taking into consideration all City of Leduc services and programs - overall how satisfied are you with the services and programs provided by the City of Leduc to residents?

***Top-2 includes those are very/somewhat satisfied**

DERIVED IMPORTANCE OF CITY SERVICES

Satisfaction with the Leduc Recreation Centre and other recreation facilities is the strongest driver of overall satisfaction.

Significant Drivers of Overall Satisfaction With City Services (Beta Scores*)

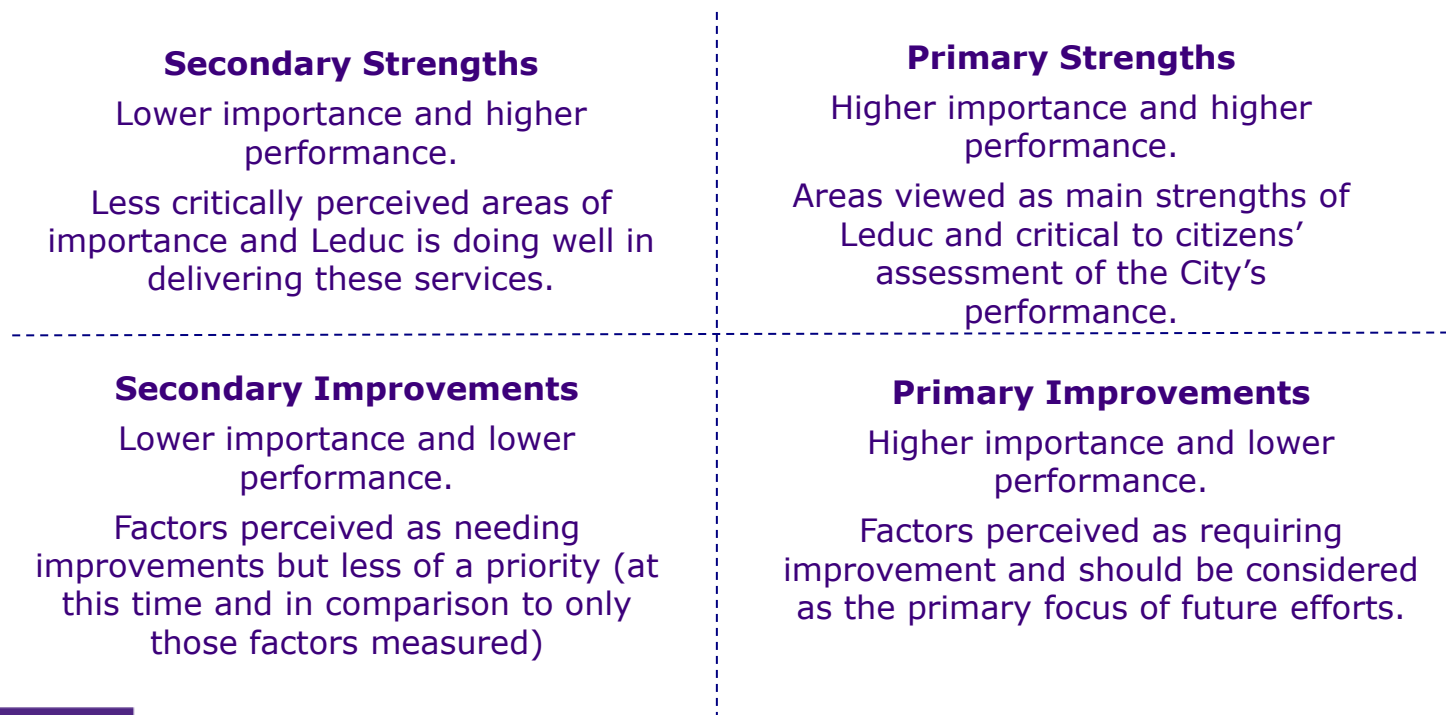


*Total model R2 score of .501 with overall significance at the 95% level of confidence ($p < .05$)

PERFORMANCE MATRIX EXPLANATION

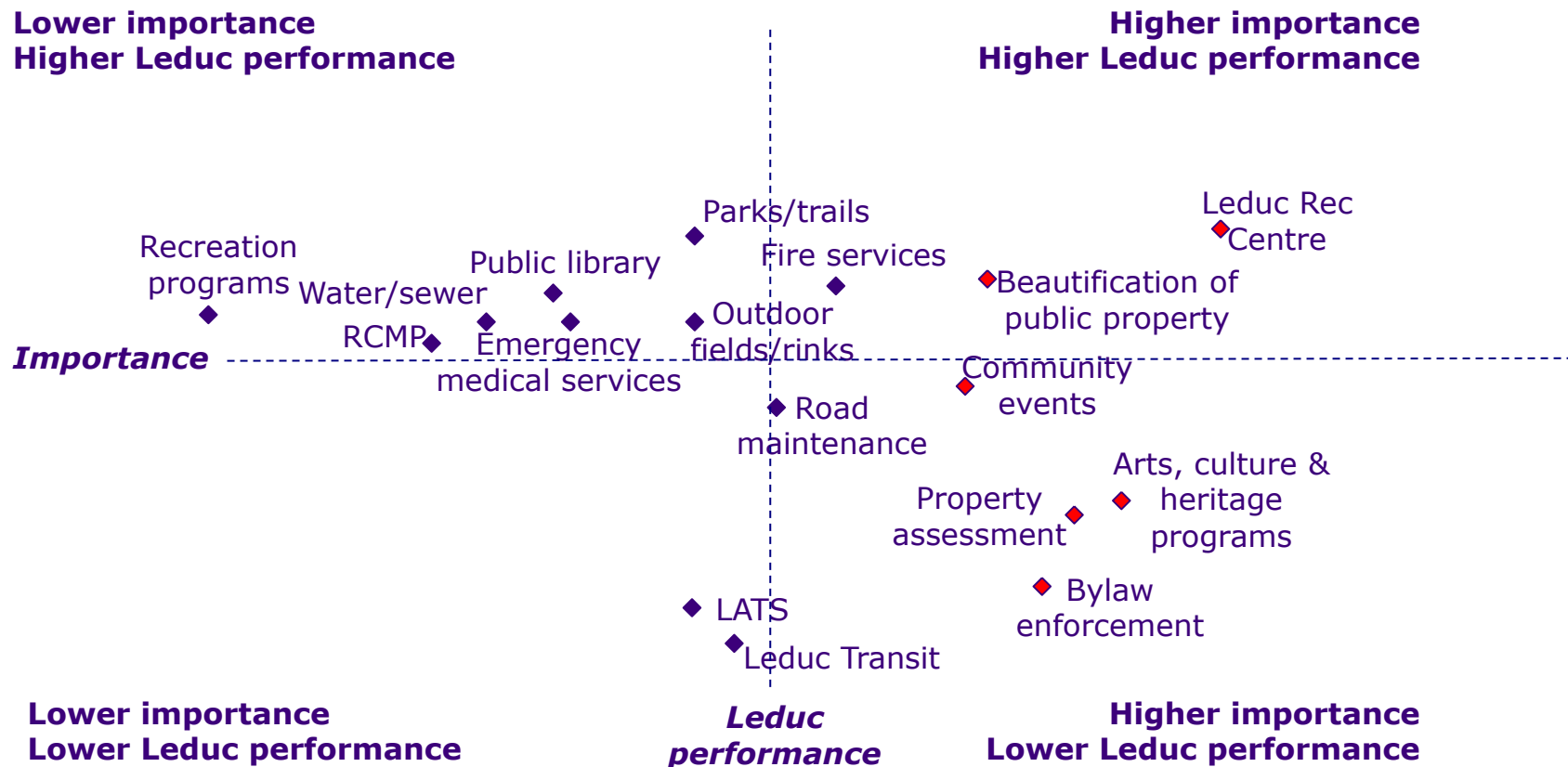
Description of the matrix comparing performance and importance.

- Factors or attributes with the lowest levels of performance or lowest importance may not necessarily be the areas where improvement is most desired or needed. For example, if there is no relationship between overall satisfaction with the City of Leduc and a specific service, then focusing on improving this attribute will likely have limited impact on overall views of the City's performance. Conversely, if there is a strong relationship between a specific attribute and overall satisfaction, the City should focus on improving in this area.
- The following two-dimensional graph maps out residents' derived level of importance for a specific factor and how they rate Leduc's performance on that factor, thereby identifying strengths and areas for improvement.
- **NB: Dots marked in red are those that are statistically significant drivers ($p < .05$) of citizen satisfaction.**



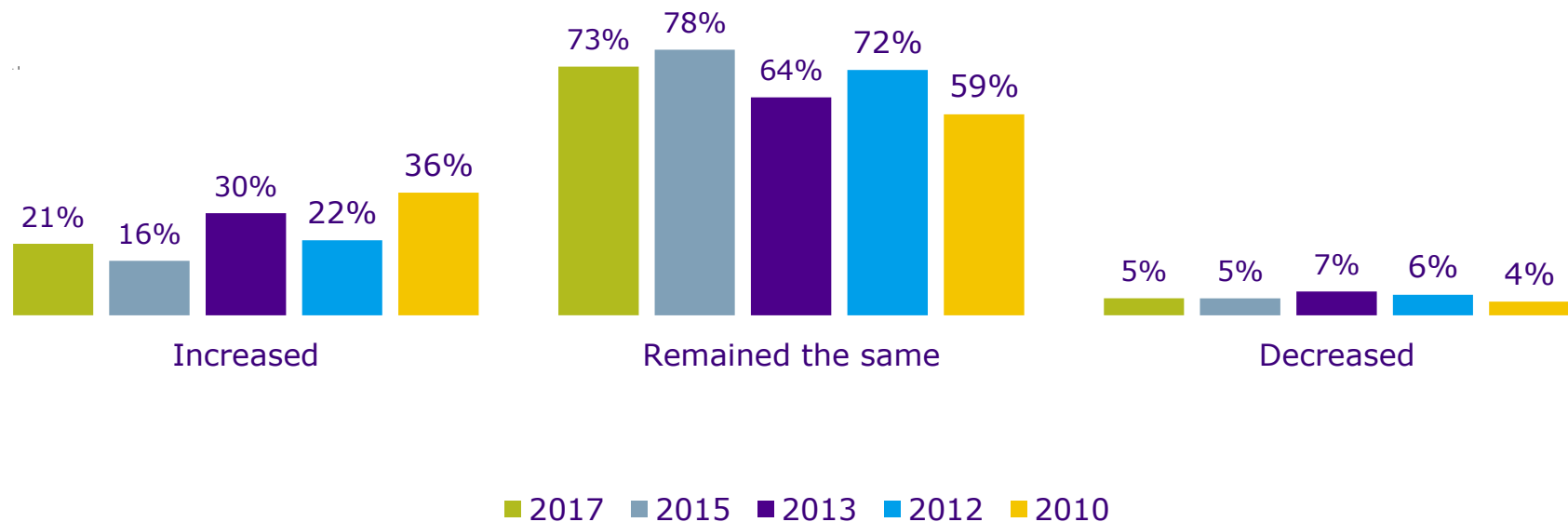
DRIVERS OF SATISFACTION

Arts/cultural programs, property assessment and bylaw enforcement are lower-satisfaction areas requiring improvement.



PERCEIVED CHANGES IN SERVICE QUALITY

One in five residents believe City services have improved during the past year



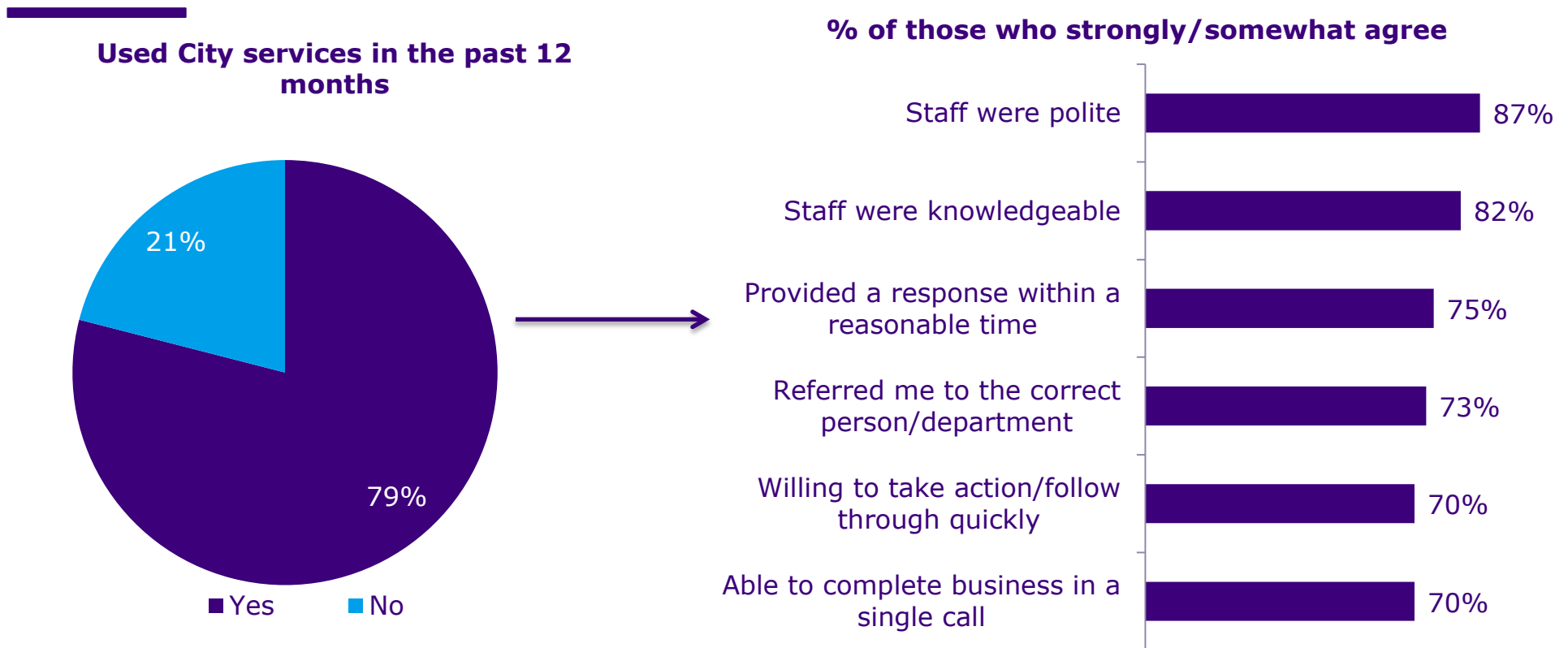
Those with children in the household (28%, vs. 15% of those with no children at home) are more likely to say that the quality of service provided by the City has increased during the past 12 months.

Those who are not currently working (15%) and those who are long-time Leduc residents (15% of those in the community for 20+ years) are less likely to say service quality has increased.

Q8 Thinking back over the last 12 months, would you say that the quality of service provided by the City of Leduc has ...?

SATISFACTION WITH CITY STAFF

Residents who have accessed City services are most likely to agree that City staff were polite and knowledgeable



- Older adults aged 55+ are more likely to say that City staff were polite (93% vs. 84% 35-54)
- Younger adults, meanwhile, are more likely to say staff completed their business in a single phone call (80% vs. 63% among those 35-54)

Q10. During the past 12 months, have you personally used or accessed any services from the City of Leduc?

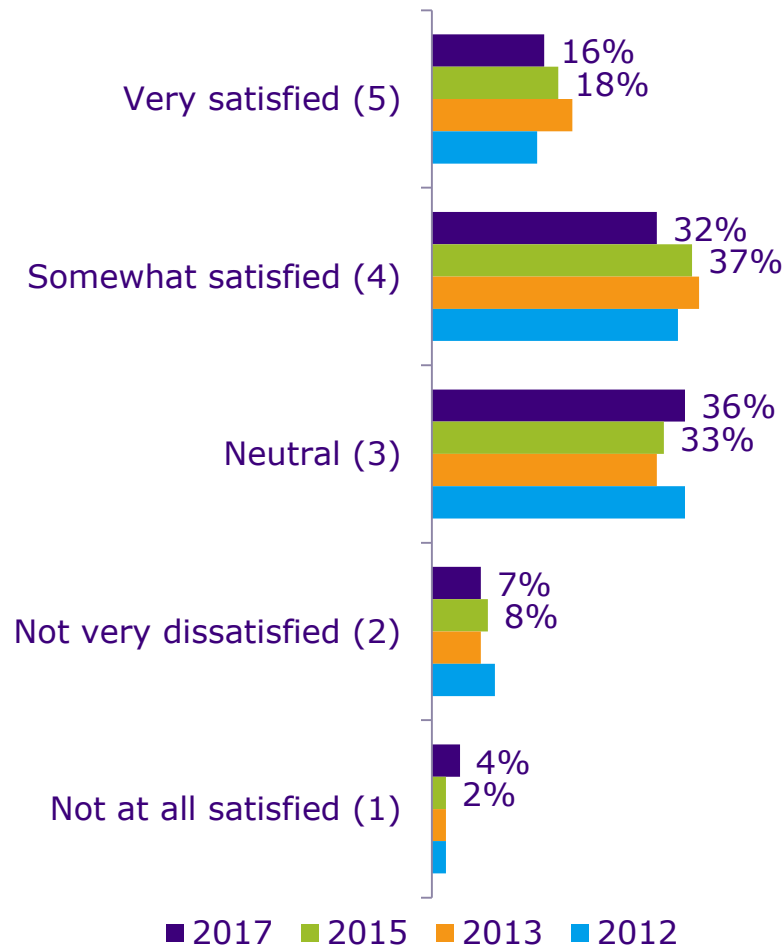
Q11 Thinking of your most recent experience with the City of Leduc, I'm going to ask you a number of questions about the service you received. Some of these may or may not be applicable to your experience. Please provide a rating using a scale where 1 means you strongly disagree and 5 means you strongly agree. **(Base: Those who have accessed City services)**



Communications

SATISFACTION WITH COMMUNICATION FREQUENCY

One half of Leduc residents continue to be at least somewhat satisfied with how often the City communicates with them



Top-2*: 48% (-7%)

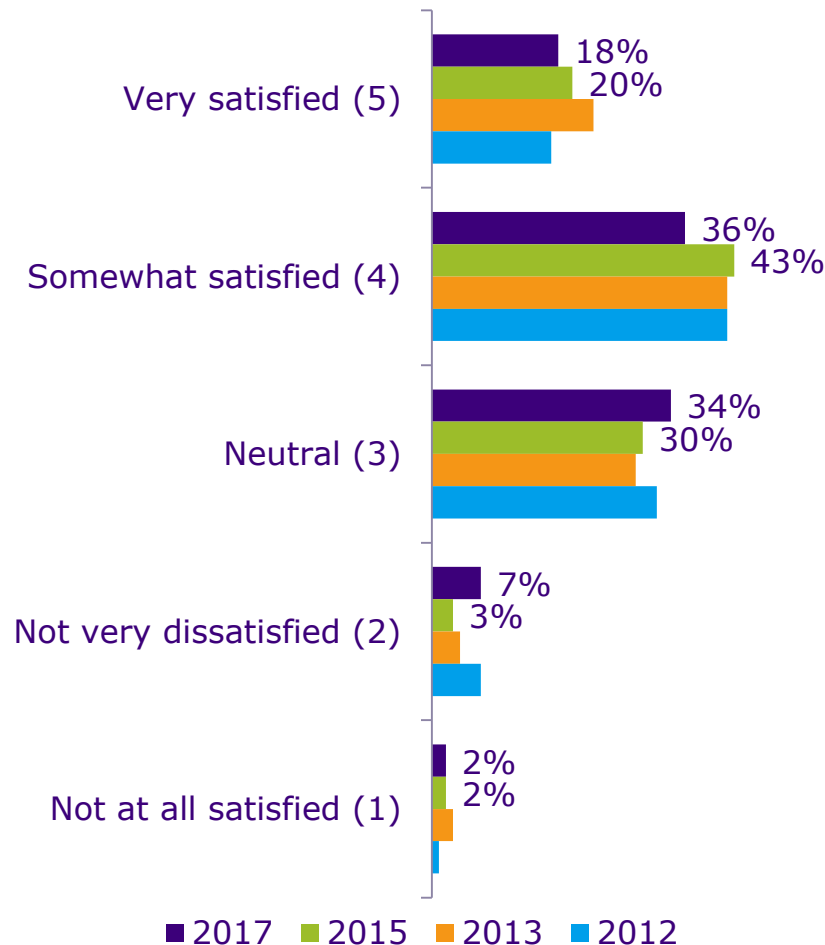
Younger adults are less likely to be very or somewhat satisfied with how frequently the City communicates with residents (34% vs. 58% among those 35-54).

Those more likely to be satisfied with the City's services, enjoy an excellent quality of life and recommend Leduc as a place to live are more likely to commend the City for how often it communicates with residents.

Q12A How satisfied are you with: How frequently the City communicates with residents?
 *Top-2 includes those very/somewhat satisfied

SATISFACTION WITH COMMUNICATION QUALITY

One half of Leduc residents are satisfied with the quality of City communications - a slight decrease from a year ago



Top-2*: 54% (-9%)

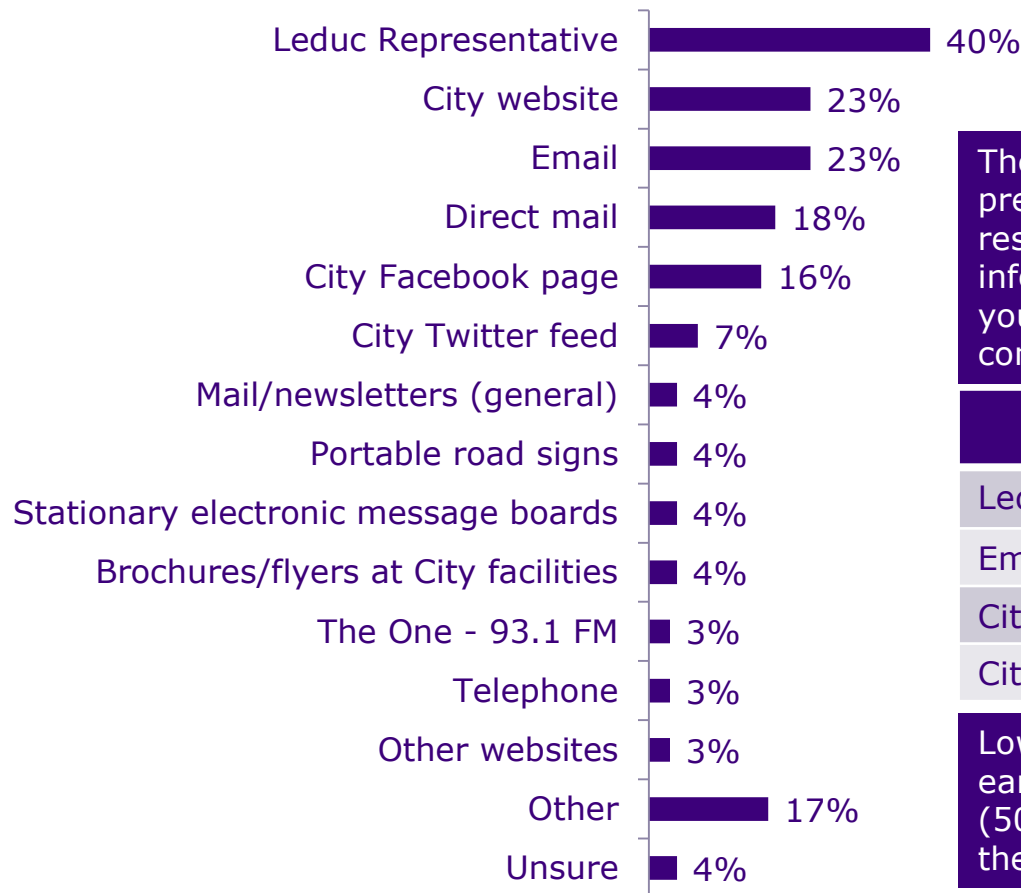
Satisfaction with communication quality is relatively consistent across all demographic groups.

Again, however, those more likely to be satisfied with the City and their experience in Leduc are more likely to offer praise for how well the City keeps citizens informed.

Q12B How satisfied are you with: The overall quality of communication from the City ?
 *Top-2 includes those very/somewhat satisfied

PREFERRED SOURCE FOR CITY INFORMATION

The local newspaper is the most preferred source of information about the City for Leduc for older, longer-term residents.



The greatest differences in communications preferences are by age group, with older residents more likely to prefer obtaining information from the local newspaper and younger people more partial to online communications methods

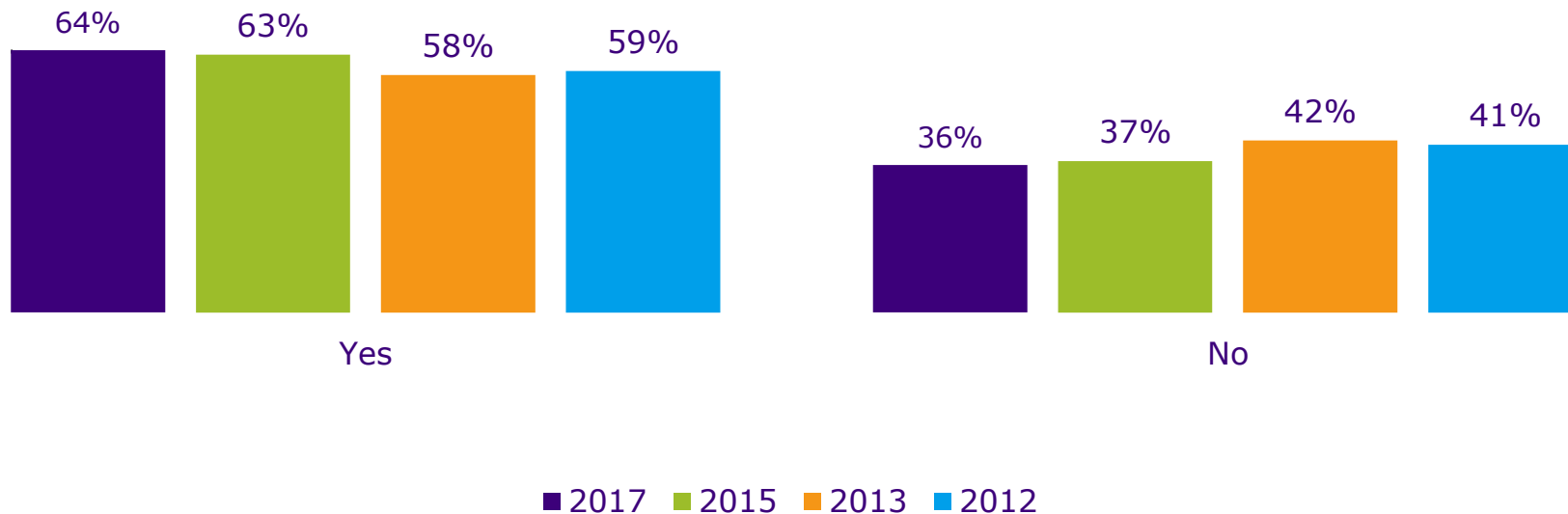
	18-34	35-54	55+
Leduc Rep	27%	39%	55%
Emails	36%	15%	19%
City Facebook page	23%	19%	3%
City Twitter feed	12%	8%	1%

Lower-income earners (56% among those earning <\$50K) and longer-term Leduc residents (50%) are also more partial to receiving news via the Leduc Rep.

Q13 What source would you prefer to receive City of Leduc news and information from?

WEBSITE VISITATION

Six in ten residents have visited the City website within the past six months



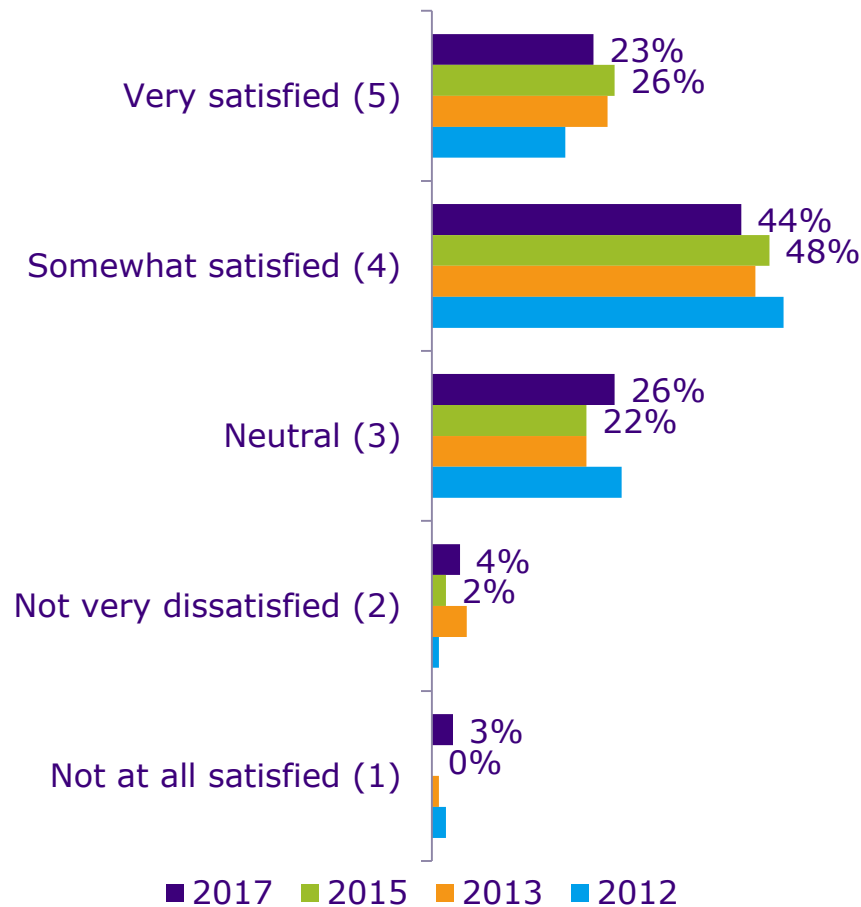
Website visitation is highest among:

- Those aged 35-54 (72% vs. 56% among those 55+)
- Upper-middle income earners (80% of those earning \$100K-\$150K)
- Those working full-time (68% vs. 47% among retirees)

Q14. Have you visited the City of Leduc website (www.leduc.ca) in the past six months?

SATISFACTION WITH THE CITY WEBSITE

Two thirds of website users are at least somewhat satisfied with the experience, down slightly compared to 2015



Top-2*: 67% (-7%)

Satisfaction is higher among:

- Women (75% vs. 58% among men)
- Those who are satisfied with City services (73%)
- Those who say their quality of life is excellent (84%)

Q15 Overall, how satisfied are you with the City of Leduc websites, using a scale of 1 to 5 where 1 means not at all satisfied and 5 means very satisfied? (Base: Those who used the City website, n=247)

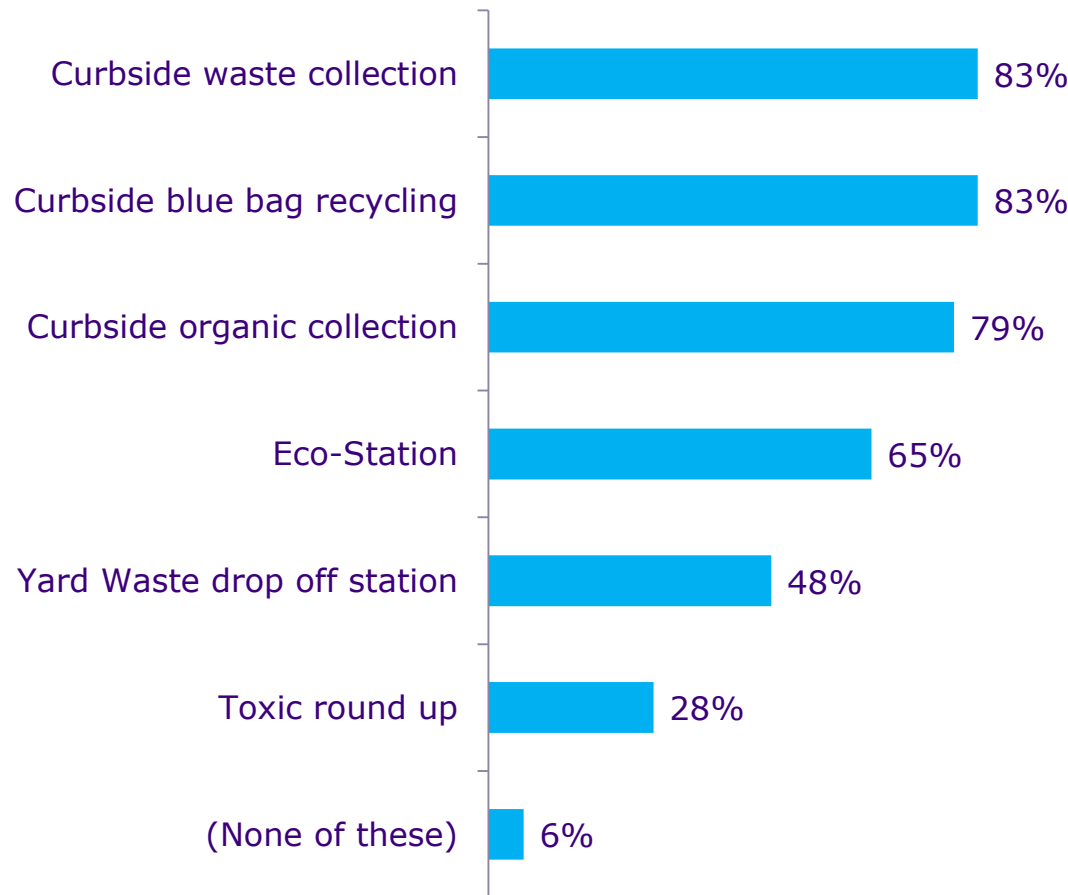
*Top-2 includes those very/somewhat satisfied



Focus on Waste/Recycling Services

USAGE OF WASTE/RECYCLING SERVICES

Four in five residents report using curbside waste, recycling and organic collection services in the past year



Usage of all six of these services is higher among those age 35-54 and homeowners

Seniors are more likely than younger adults to have used the Eco-Station (73%), yard waste drop off station (58%) and toxic round up (39%)

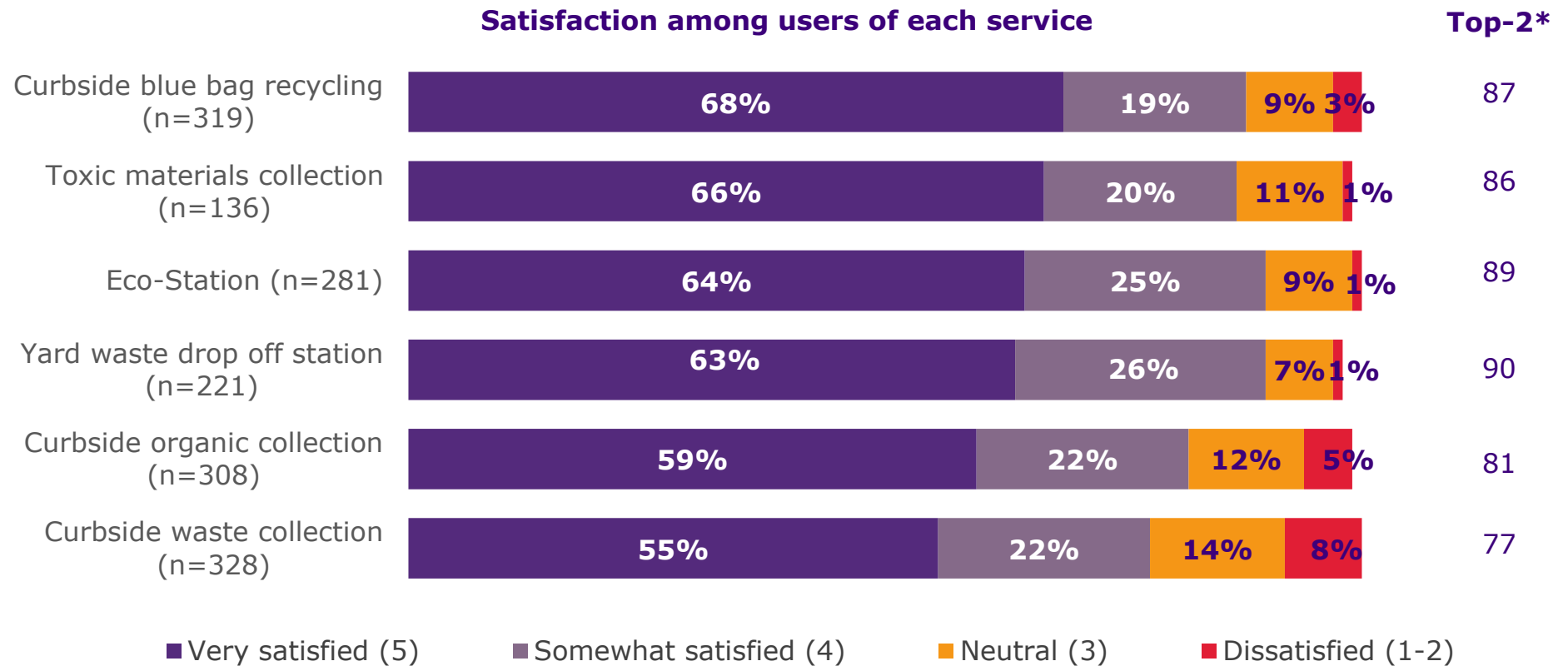
Those from higher income households are more likely to have used curbside organic collection (88% among those earning \$150K+ and 85% among those earning \$100K-\$150K vs. 58% among those earning <\$50K)

Those with children in the household are slightly more likely than those without children to have used the main waste/recycling services, including curbside waste collection (92% vs. 77%), blue bag recycling (91% vs. 76%) and organic collection (85% vs. 74%).

Q16 Indicate which of the following City of Leduc services you have used or participated in during the past 12 months?

SATISFACTION WITH WASTE/RECYCLING SERVICES

The majority of waste and recycling service users tend to offer very positive assessments of these specific offerings



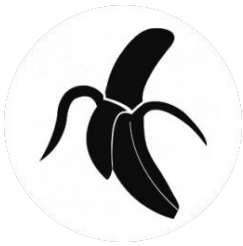
2015 satisfaction score for all waste/recycling services among all Leduc residents: 71%

Q17 And how satisfied were you with _____? Please use a 1-5 scale where a 1 means you were not at all satisfied and a 5 means you were very satisfied.

***Top-2 includes those very/somewhat satisfied**

WASTE SATISFACTION VARIATIONS AMONG SUB-POPULATIONS

Older residents are more likely to express satisfaction with core waste and recycling services, including organic collection.



Older residents aged 55+ are more likely than younger adults to be satisfied with curbside waste collection (88% vs. 70% among those 18-34) and curbside organic collection (90% vs. 71% respectively)



Longer-term Leduc residents are more likely to be satisfied with the yard waste drop off station (94% vs. 81% among those living in Leduc 10-19 years)



Retirees are more likely to be satisfied with curbside blue bag recycling (96% vs. 84% among those working full-time).

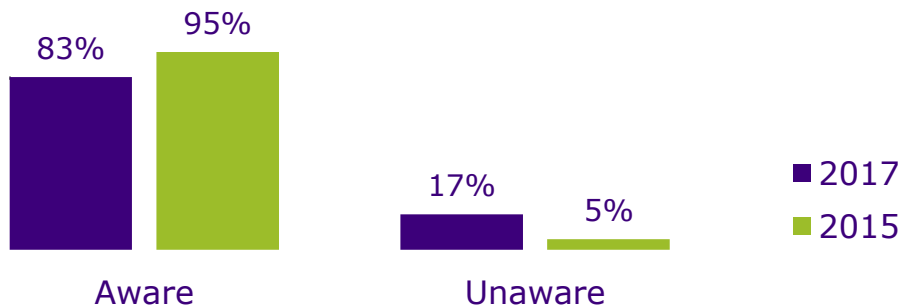


Views Regarding Annexation

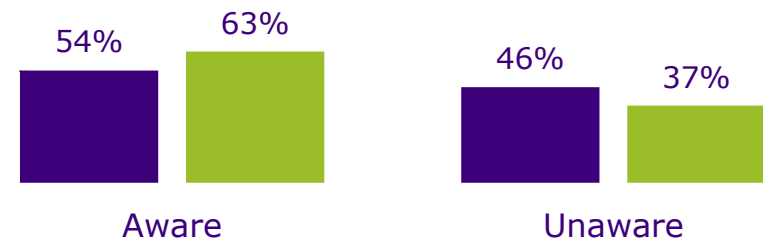
VIEWS ON THE ANNEXATION PROPOSAL

Awareness of the annexation proposal and tax-sharing agreement is lower today; opposition to the deal is less firm than in 2015

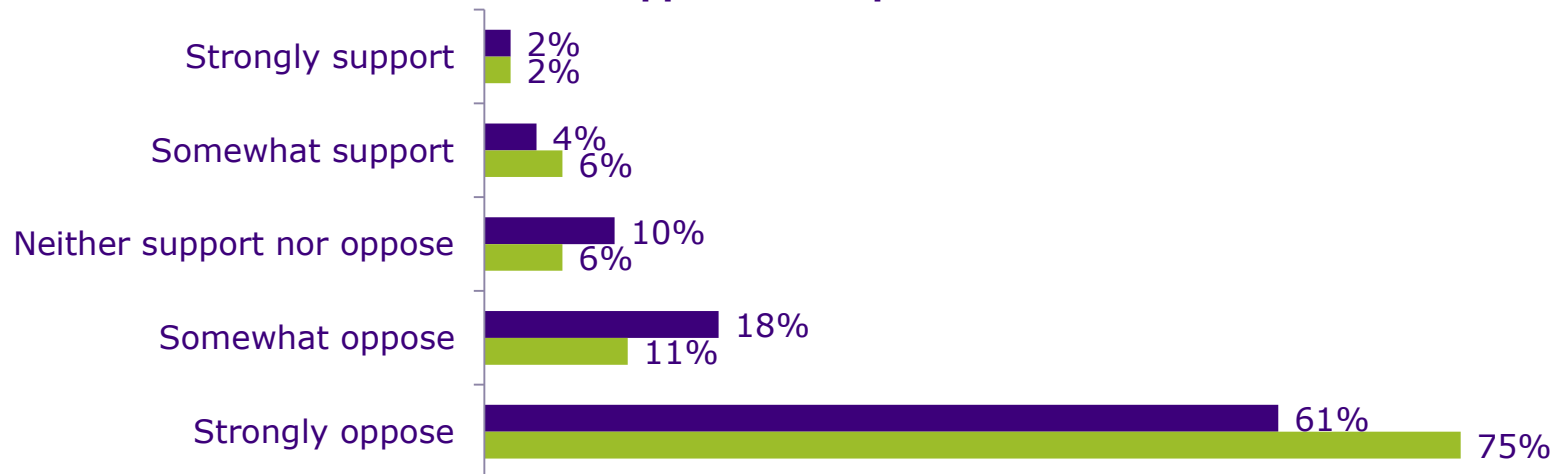
Awareness of Annexation Proposal



Awareness of Tax-Sharing Agreement



Support for Proposed Annexation



Q18. Before today, were you aware that Edmonton is still pursuing annexation of the Edmonton International Airport?

Q19. Are you aware that the City of Leduc has a tax sharing agreement with Leduc County with regards to the Edmonton International Airport that currently represents 6% of the City's tax base revenue?

Q20. Based on what you know, do you strongly oppose, somewhat oppose, neither support nor oppose, somewhat support or strongly support Edmonton's proposed annexation of the airport?

VIEWS ON ANNEXATION VARIATIONS AMONG SUB-POPULATIONS

Older adults are among those most likely to oppose the annexation proposal.



Although women are more likely to be aware of the annexation proposal (88% vs. 78%), men are more likely to be aware of the tax-sharing agreement with Leduc County (61% vs. 48% respectively). Homeowners (58%) and retirees (71%) are also more likely to be familiar with the City's tax sharing agreement.



Opposition to the annexation proposal is strongest among older adults (87%, including 72% who strongly oppose, vs. 70% strongly/somewhat oppose among adults age 18-34).



Conclusions and Recommendations

CONCLUSIONS AND RECOMMENDATIONS

- Generally speaking, residents of Leduc continue to be satisfied with the direction of their community and the services provided to them by their City government. Most changes in year-over-year satisfaction scores were relatively minor, and the City continues to achieve strong results on quality of life measures.
- Certain services are more significant drivers of overall satisfaction levels than others:
 - Satisfaction with the Leduc Recreation Centre and other public recreation facilities, as well as satisfaction with the beautification of public property, is already very high. The City should seek to maintain citizen satisfaction in these areas, but it is unlikely that satisfaction scores with these specific services will increase dramatically.
 - There is an opportunity to improve satisfaction scores for City-produced community events and arts and cultural events. These are key drivers of overall satisfaction with City services (and satisfaction with community events is also closely linked to the likelihood of recommending Leduc to others). Improving satisfaction scores in these areas is very likely to have a positive impact on overall satisfaction scores.
 - Property assessment and bylaw enforcement are also two potential areas for improvement; however, these are “secondary” drivers of overall satisfaction.
- There is also a desire for the City to improve how effectively and how frequently it communicates with residents. The City should continue to use a mix of different tools to communicate with different age groups, with traditional media continuing to be desirable for older residents.
- Although opposition to annexation remains strong, views regarding the City of Edmonton’s proposal have softened slightly in the past year – which is likely the result of this issue no longer being discussed as prominently as it was in 2015.

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