



2020 Citizen Satisfaction Survey Final Report

ST. JOHN'S



Section 1:

BACKGROUND AND METHODOLOGY



BACKGROUND AND OBJECTIVES

Background

- In 2015, the City of St. John's rolled out its first strategic plan which was used to provide direction for council and the city's operations based on five core values.
- As council began the process of developing a new strategic plan and budget for the 2019-2021 timeframe, it was determined that a Citizen Satisfaction Survey was needed to help guide this process.
- The 2018 survey provided a benchmark from which the City can measure any changes in priorities and provide ongoing performance measurement following the implementation of the 2019 Strategic Plan.
- The 2020 survey was used to measure any change in perceptions over time, and to evaluate the new strategic plan.

BACKGROUND AND OBJECTIVES

Objectives

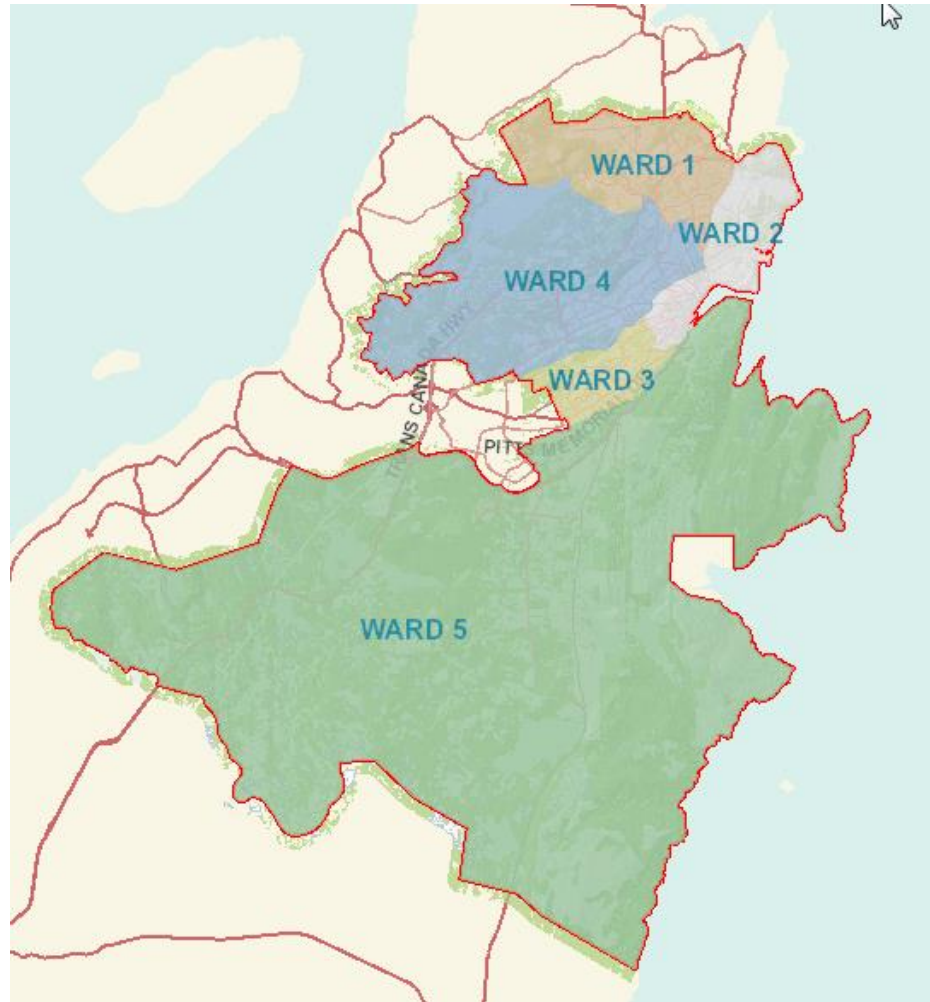
- The key objectives of this research are to:
 - Provide further input into the City's strategic planning and budget processes;
 - Evaluate the City's current strategic directions;
 - Identify priority issues and priority programs and services;
 - Gauge citizen awareness, perception of, and satisfaction with, City programs and services;
 - Identify gaps in services (gap analysis of service importance vs. satisfaction);
 - Identify any impacts of COVID-19 on citizens' personal finances and their perceptions of city programs and services;
 - Measure progress/improvement over time; and
 - Provide data for the City's developing performance management systems.

METHODOLOGY

- A telephone methodology was used for this study with both active landline and cellular numbers making up the sampling frame. The survey was conducted between October 24th and November 15th, 2020.
- A total of 501 surveys were completed (298 landline / 203 cell) resulting in an overall margin of error of ± 4.4 percentage points 19 times out of 20.
- 100 surveys were completed in each of the 5 Wards of the City using a stratified sampling approach. The margin of error for results at the level of each ward is ± 9.8 percentage points 19 times out of 20.
- The questionnaire was designed by MQO Research in consultation with the City of St. John's. The average survey length was approximately 21 minutes.
- The final results were weighted by age and gender based on the most recent census data. Weighting was also applied by cell vs. landline.

METHODOLOGY

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





Section 3:

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Overall Perceptions

Quality of Life



Up by 10 percentage points

Overall Satisfaction



Up 15 percentage points

Value for Tax Dollars



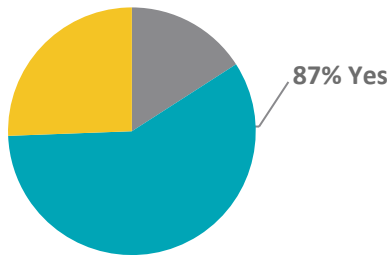
Up 14 percentage points

Priorities for Citizens

Non-Essential
Infrastructure:
Top Priority

Non-Profit Housing
31% Ranked 1st
61% Ranked within Top 3

Balanced Investments Between
Essential and Non-Essential?



Program and Service Priority Areas

Primary Areas for Improvement

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

Sustain and Reinforce:

- Garbage collection
- Residential water and sewer repairs
- Parks, open spaces and trails
- Recreation facilities/programs/activities
- Curbside recycling
- GoBus/Accessible taxi

Secondary Areas for Improvement:

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

Watch and Maintain:

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

EXECUTIVE SUMMARY

Communications and Engagement

Top Performing Areas

No significant changes from 2018

- ✓ Courteous, helpful and knowledgeable
- ✓ Providing desired information
- ✓ Waste & recycling app (among users, 31%)

86% Agree

83% Agree

87% Rating 8 +



Managing City's money responsibly



Opportunities for meaningful input



Being accountable

56% Agree

60% Good/Excellent

65% Good/Excellent

Significant positive increases since 2018

87% trust the City to some degree

Strategic Direction

% Importance (8 +)



A Sustainable City
92%



A City That Moves
78%



An Effective City
87%



A Connected City
77%

% Agree

- ✓ St. John's is welcoming & inclusive - 93%
- ✓ St. John's is on the right track - 87%
- ✓ I belong in St. John's - 93%
- ✓ St. John's is progressive - 82%

COVID-19

Financial Situation in 2020 Compared to 2019

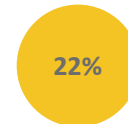
Improved



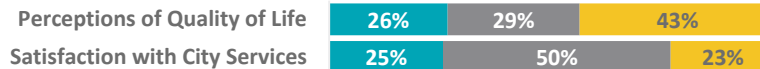
Same



Worsened



COVID-19's Impact On:



■ Positive Impact ■ No Impact ■ Negative Impact



Section 4:

QUALITY OF LIFE

OVERALL QUALITY OF LIFE

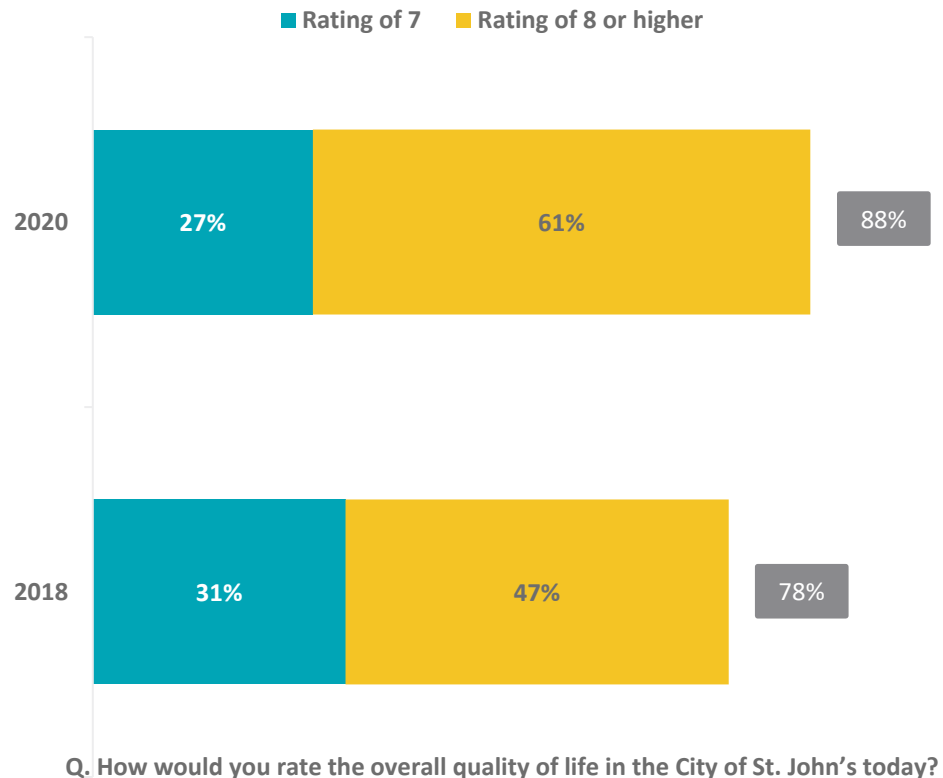
Perceptions of quality of life in St. John's have increased since 2018.

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

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

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

Quality of Life





Section 5:

PROGRAMS AND SERVICES



OVERALL SATISFACTION

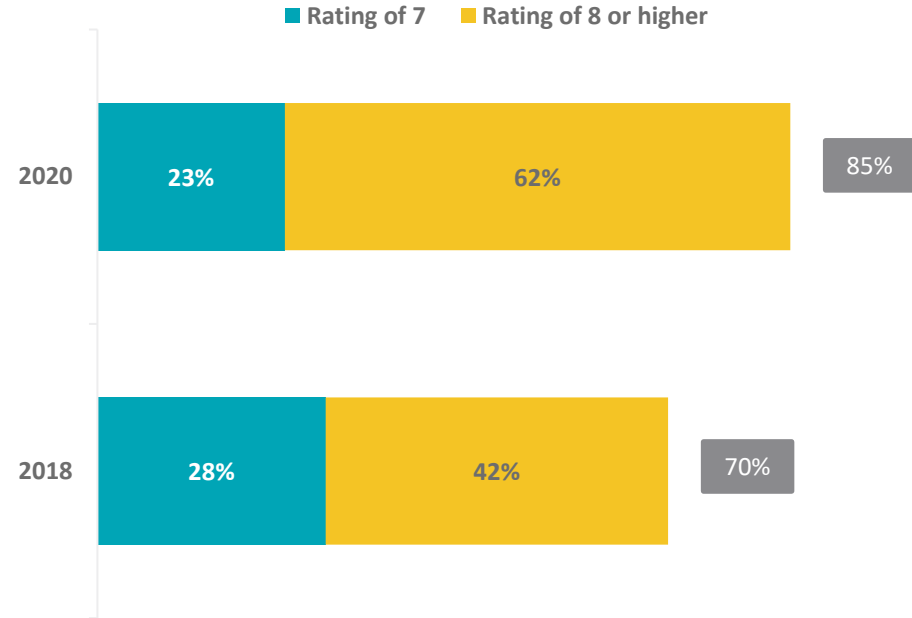
Satisfaction with city programs and services also increased significantly since 2018.

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

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

- Snowclearing issues (includes sidewalks) – 18%
- General issues – 13%
- Lack of recreation programs and services – 12%
- Poor public transportation – 9%
- Parking issues – 6%
- Garbage and recycling collection issues – 6%

Overall Satisfaction



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

MUNICIPAL SERVICES - OVERVIEW

In order to assess the programs and services currently provided by the City of St. John’s, residents were provided with a list of 20 service areas and asked to rate the importance of each service area and to what extent they are satisfied with each. Two new service areas were added in 2020 which are highlighted in the table below.

Table 4: Service Areas Evaluated

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

* Public Transportation split into two areas in 2020

OVERALL IMPORTANCE

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

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

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

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

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

* Public Transportation split into two areas in 2020

OVERALL SATISFACTION

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

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

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

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

* Public Transportation split into two areas in 2020

GAP ANALYSIS

First, a **gap analysis** was conducted to identify the difference between the perceived importance of each service area and residents' level of satisfaction. Through gap analysis, we can identify those service attributes for which there is a gap in how important an attribute is to a customer and how the City is performing.

As illustrated in the sample table below, the gap analysis identifies key attributes where the perceived current service level matches the importance of that service area and where there is a “gap.”

Table 7: Gap Analysis - Example

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

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

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

GAP ANALYSIS

The following table shows the difference between the perceived importance of each service area and residents' level of satisfaction.

As the table demonstrates, the largest gaps exist for areas related to roads and transportation (i.e. maintenance, snow clearing and traffic planning).

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

Notably, that the lowest rated area, community events, was still rated highly important (8 or higher) by 59% of respondents.

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

* Public Transportation split into two areas in 2020

ACTION GRID

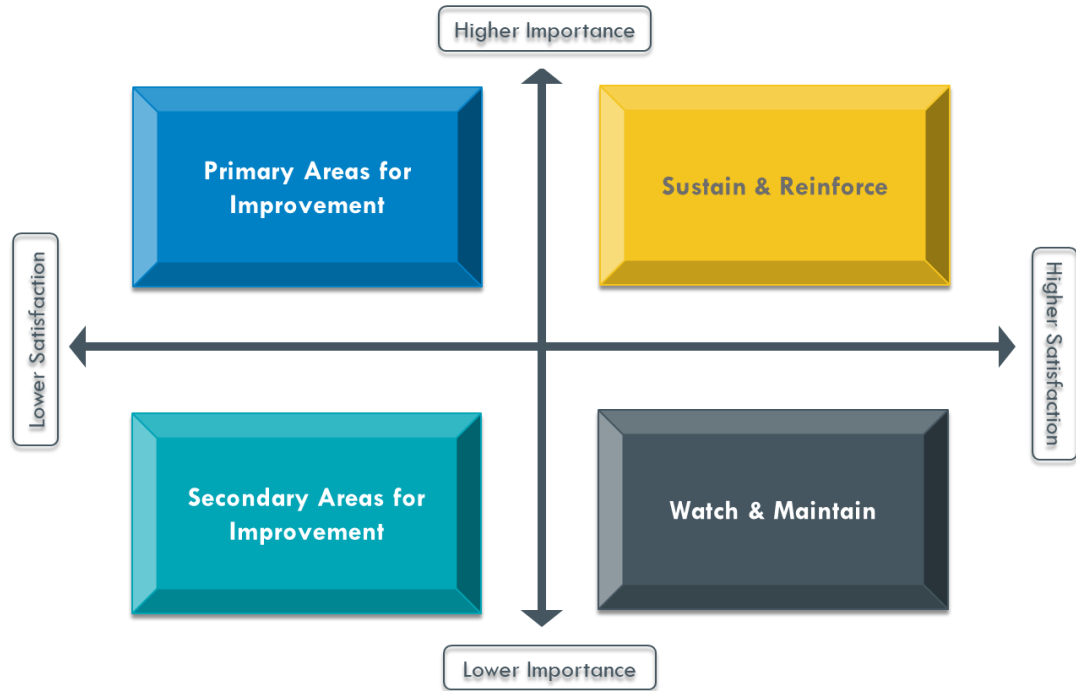
Action grids visually combine the perceived importance of each service attribute with the residents' level of satisfaction. This technique places each service area in one of four "quadrants" or priority areas.

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

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

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

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



ACTION GRID – CITY OF ST. JOHN’S

Primary Areas for Improvement:
 Road maintenance
 Road snow clearing
 Traffic planning
 Sidewalk snow clearing

Sustain and Reinforce:
 Garbage collection
 Residential water and sewer repairs
 Parks, open spaces and trails
 Recreation facilities/programs/activities
 Curbside recycling
 GoBus/Accessible taxi

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

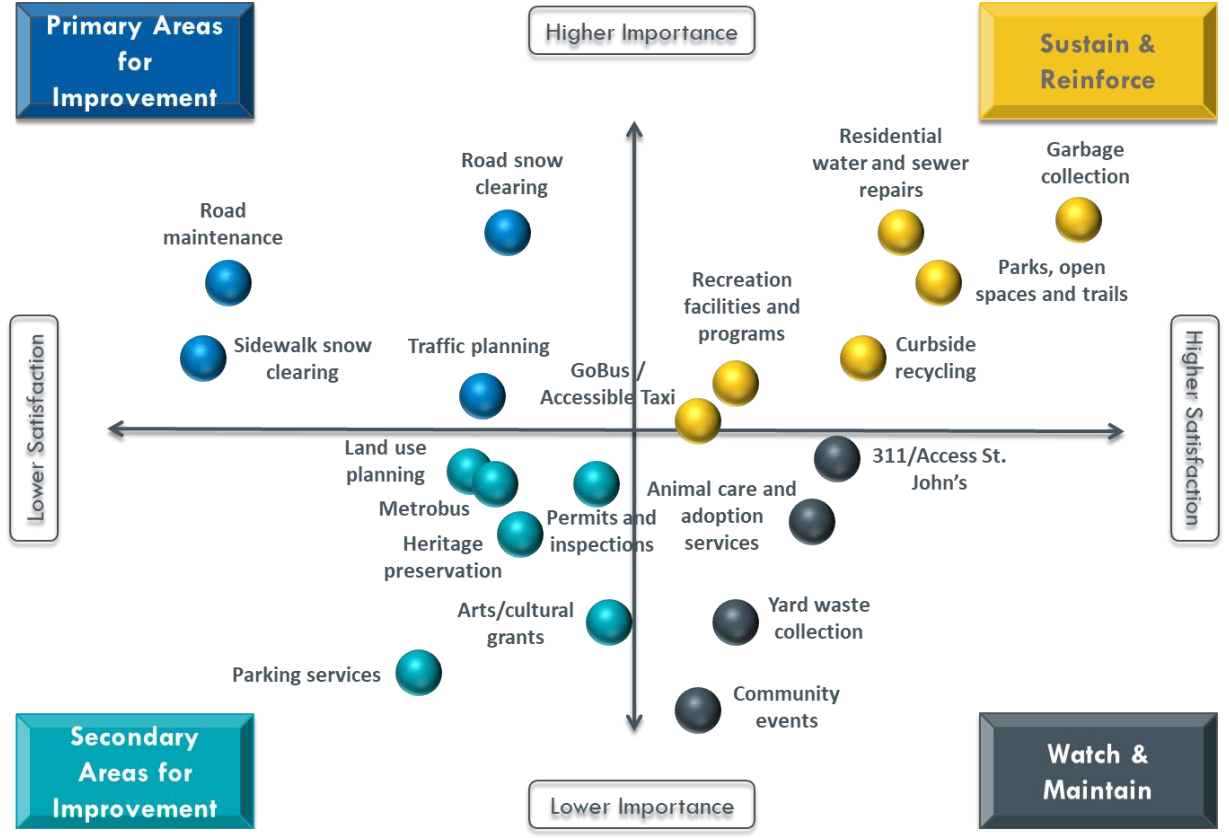
Watch and Maintain:
 Animal care and adoption services
 311/Access St. John's
 Community events
 Yard waste collection

Primary Areas for Improvement

Secondary Areas for Improvement

Sustain & Reinforce

Watch & Maintain



ACTION GRID – COMPARISONS

Comparing the placements of each item within the action grid between 2018 and 2020, very little change could be observed, with most items remaining in their designated priority areas.

Notably, in splitting public transportation services into two areas for 2020's survey, Metrobus was designated as a secondary area of improvement, while the GoBus/Accessible taxi service was rated higher in terms of importance and satisfaction.

2018

<u>Primary Areas for Improvement:</u> Road maintenance Road snow clearing Traffic planning Sidewalk snow clearing
<u>Sustain and Reinforce:</u> Garbage collection Residential water and sewer repairs Parks, open spaces and trails Recreation facilities/programs/activities Curbside recycling Public transportation services
<u>Secondary Areas for Improvement:</u> Permits and inspections Land use planning Heritage preservation Parking services Arts/cultural grants
<u>Watch and Maintain:</u> Animal care and adoption services 311/Access St. John's Community events

2020

<u>Primary Areas for Improvement:</u> Road maintenance Road snow clearing Traffic planning Sidewalk snow clearing
<u>Sustain and Reinforce:</u> Garbage collection Residential water and sewer repairs Parks, open spaces and trails Recreation facilities/programs/activities Curbside recycling GoBus/Accessible taxi
<u>Secondary Areas for Improvement:</u> Permits and inspections Land use planning Heritage preservation Parking services Arts/cultural grants Metrobus
<u>Watch and Maintain:</u> Animal care and adoption services 311/Access St. John's Community events Yard waste collection

ACTION GRID SUMMARY BY WARD

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

ACTION GRID SUMMARY BY WARD – COMPARISONS

	Ward 1		Ward 2		Ward 3		Ward 4		Ward 5	
	2020	2018	2020	2018	2020	2018	2020	2018	2020	2018
Sidewalk snow clearing	Secondary Focus	Primary Focus	Primary Focus	Primary Focus	Primary Focus	Primary Focus	Primary Focus	Secondary Focus	Primary Focus	Secondary Focus
Land use planning	Secondary Focus	Secondary Focus	Primary Focus	Secondary Focus	Secondary Focus	Secondary Focus	Secondary Focus	Secondary Focus	Secondary Focus	Secondary Focus
Recreation facilities and programs	Sustain & Reinforce	Sustain & Reinforce	Watch & Maintain	Watch & Maintain	Watch & Maintain	Sustain & Reinforce	Watch & Maintain	Watch & Maintain	Sustain & Reinforce	Sustain & Reinforce
Animal care and adoption services	Sustain & Reinforce	Watch & Maintain	Watch and Maintain	Sustain & Reinforce	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain
311/Access St. John's	Sustain & Reinforce	Watch & Maintain	Sustain & Reinforce	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain
Permits and inspections process	Watch & Maintain	Secondary Focus	Sustain & Reinforce	Secondary Focus	Secondary Focus	Watch & Maintain	Secondary Focus	Sustain & Reinforce	Secondary Focus	Secondary Focus
Community events	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Watch & Maintain	Secondary Focus	Watch & Maintain

The above table highlights changes between 2018 and 2020 in terms of action grid placement for each area across the five wards. Areas not highlighted here showed no changes between years. Wards 1 and 2 showed the most change over time.



Section 6:

COMMUNICATION AND ENGAGEMENT

INTERACTIONS WITH CITY STAFF

City staff continue to effectively interact with residents.

Overall, 43% of residents surveyed had direct contact with the City over the past 12 months which was down slightly from 2018 (48%).

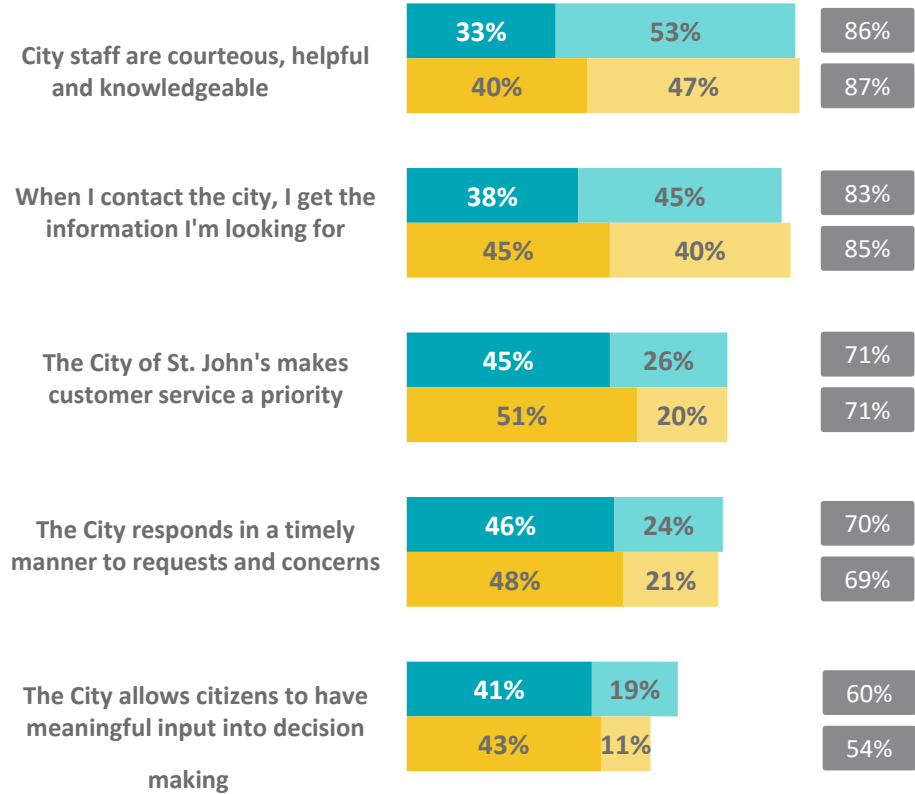
Among this group (n=214), residents continued to express positive views towards their interactions. The one weakest area continued to be allowing citizens to have meaningful input into decision making but agreement with this statement did trend upwards in 2020.

There were no significant changes in any areas between 2018 and 2020, although there was some improvement this year regarding citizen engagement in decision making.

% Agree

2020 2018

■ Somewhat agree
■ Strongly agree



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

ONLINE SERVICES

There continues to be room for growth in uptake of the city's online services.

Overall, two-thirds of residents surveyed had used the city's website which was up slightly over 2018 (59%) while approximately one-third had used the 311/Access St. John's app and the Waste and Recycling app. Meanwhile, one-in-five had used the online registration for recreation programs. No comparisons are made for the apps given these were separated out in 2020.

Meanwhile, satisfaction (% rating 8 or higher) ranged from 59% for the City's website to 87% for the Waste and Recycling app. There was no change in satisfaction levels compared to 2018.

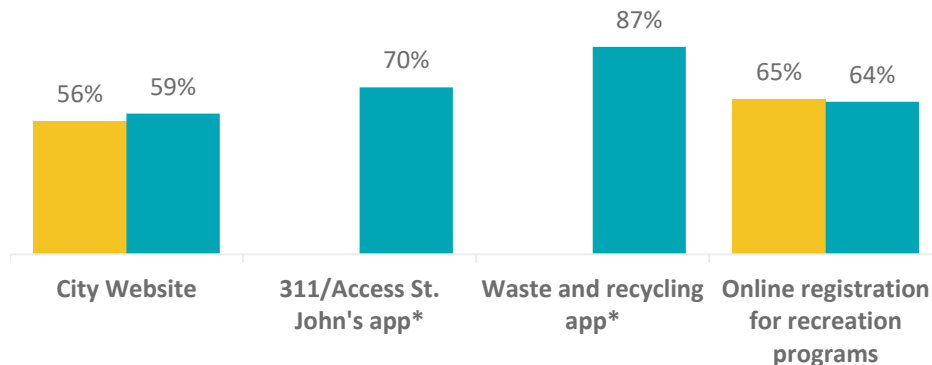
Usage - % Used

■ 2018
■ 2020



Satisfaction - % 8 or higher
Subset: Among those that used service

■ 2018
■ 2020



COMMUNICATION AND ACCOUNTABILITY

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

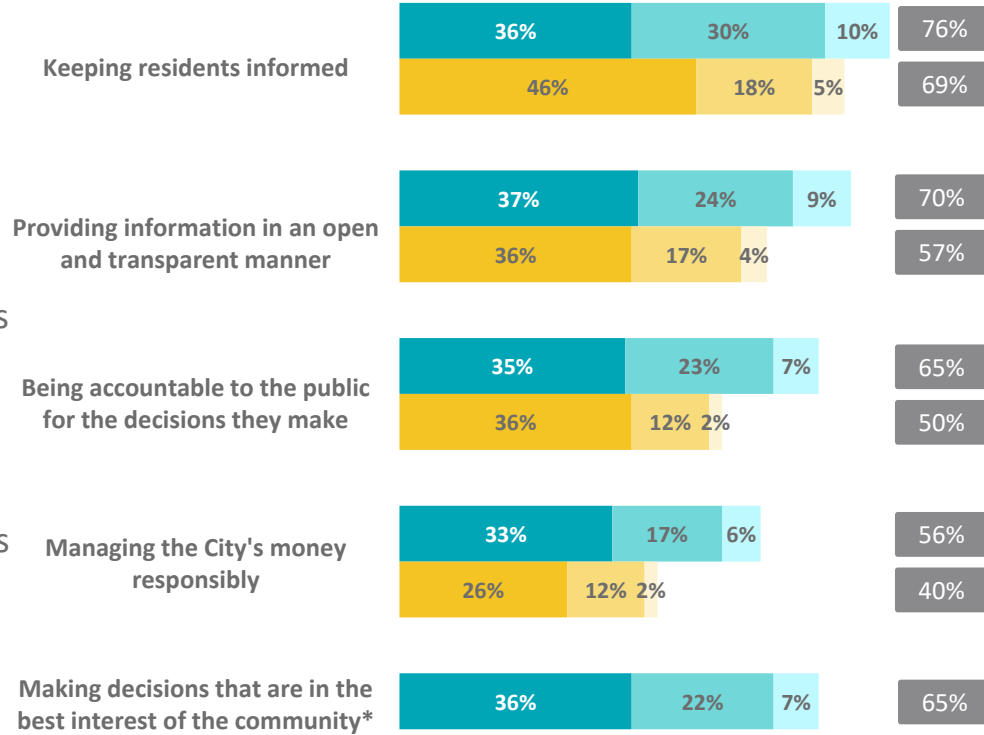
Residents were asked to rate the City on five measures of communications and accountability from poor to excellent (one new measure was added in 2020).

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

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

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

% rating Good or higher



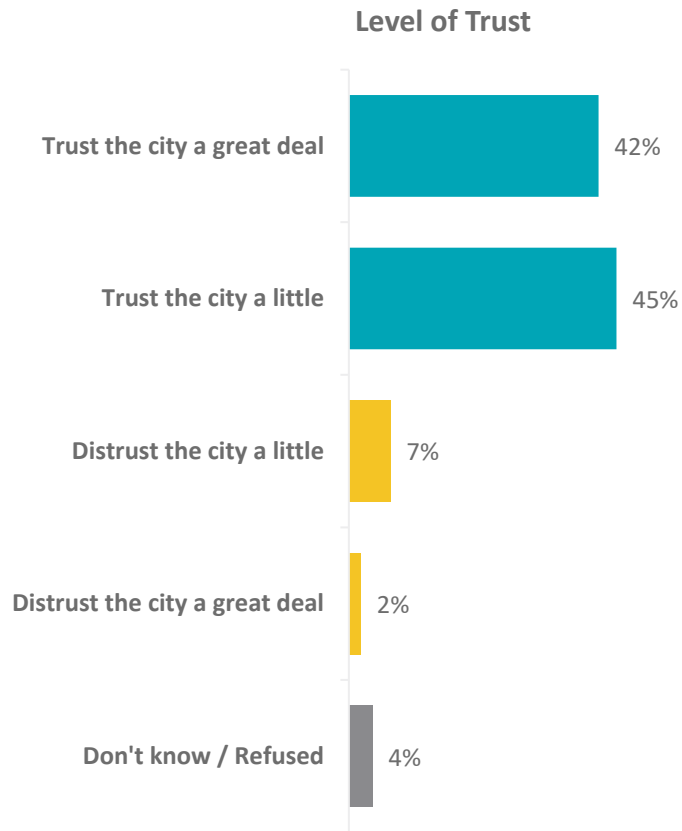
LEVEL OF TRUST

The vast majority of residents have some trust in the City of St. John's.

In 2020, residents were asked to describe the extent to which they trust the City of St. John's. Overall, 87% indicated they have some level of trust in the city, while just 9 percent expressed distrust towards the City.

While this measure is encouraging, there was a significant group who indicated they trust the city "a little" which demonstrates some room to earn further trust among this group.

The level of trust was relatively consistent across various wards.



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



Section 7:

TAXATION AND CAPITAL SPENDING

VALUE FOR TAX DOLLARS

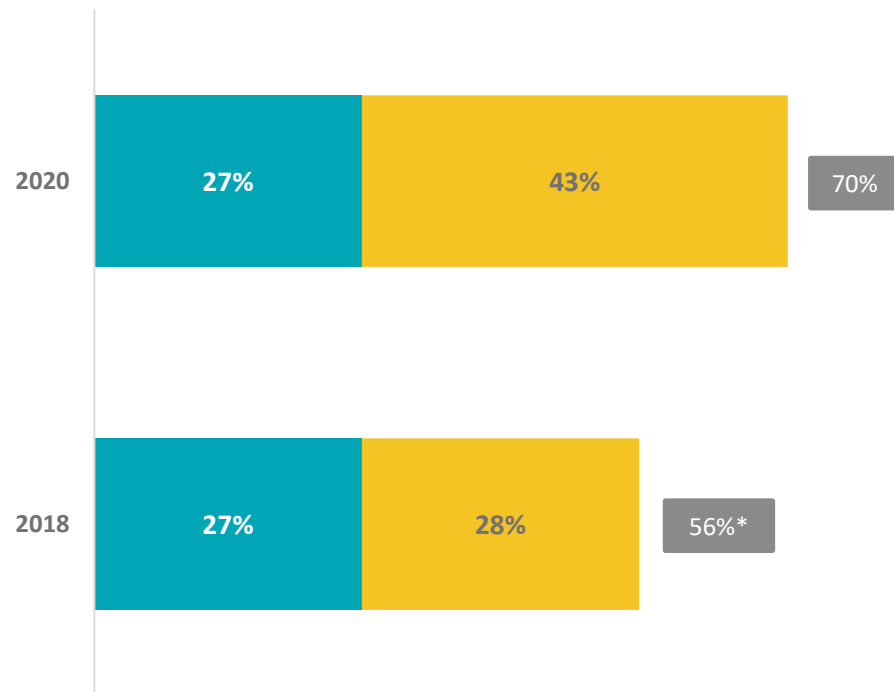
Consistent with the other key indicators, the perceived value for tax dollars increased markedly in 2020.

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

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

Overall Value

■ Rating of 7 ■ Rating of 8 or higher



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

CAPITAL SPENDING

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

Residents were asked to rate their 1st, 2nd and 3rd priority for capital spending on non-essential infrastructure. While this question was asked in 2018, no comparisons are made due to changes to the list for 2020.

Overall, city-owned and operated non-profit housing was the top ranked area, but there was also a significant number of people who ranked the other options among their top three.

Priority Area	Ranked Top 3	Ranked 1 st
City-owned and operated non-profit housing	61%	31%
Initiatives to improve energy efficiency, reduce greenhouse gases and reduce operating costs	56%	22%
Green spaces and outdoor facilities	54%	14%
Recreation and community facilities	50%	13%
Parks and playgrounds	43%	10%
Cycling infrastructure (trails/bike racks)	21%	6%

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

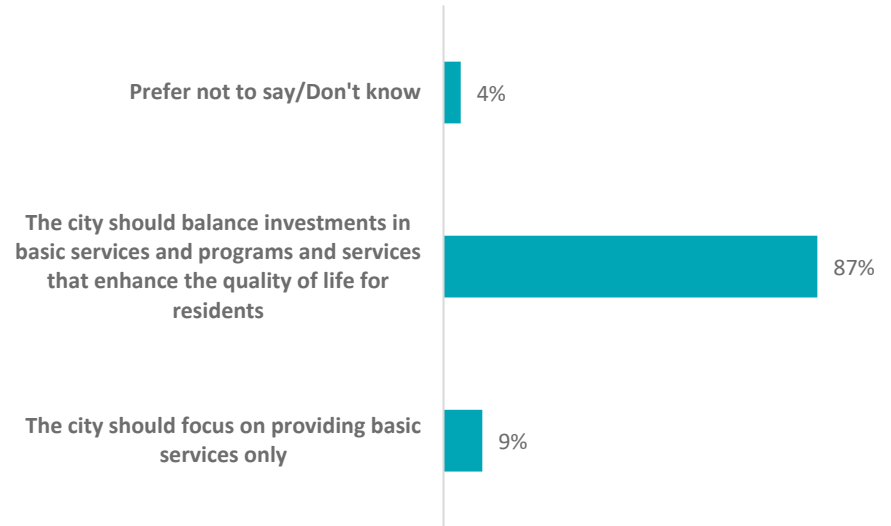
TAXES

There is significant support for balancing investments between providing basic services and additional programs/services to enhance quality of life.

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

A resounding 87% of residents support balancing investments.

% Support for Balanced Investing



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



Section 8:

STRATEGIC DIRECTION



STRATEGIC DIRECTIONS

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

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

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

Perceptions were relatively consistent across wards and demographic groups.



A Sustainable City

92%



An Effective City

87%



A City That Moves

78%



A Connected City

77%

Importance - % 8 or higher

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

PERCEPTIONS

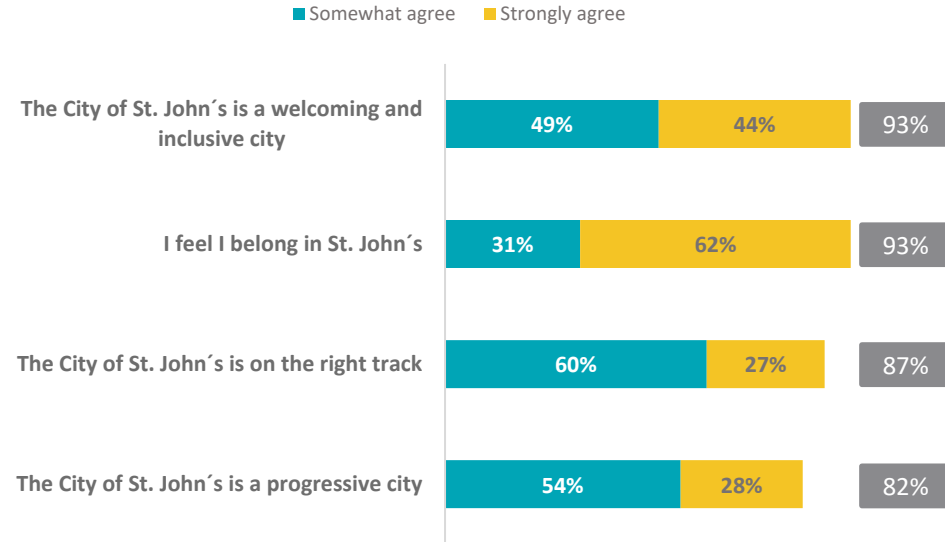
Perceptions of elements related to the City's strategic directions were very positive.

Overall, a minimum of eight-in-ten residents agreed that the City is welcoming and inclusive, is on the right track, is a progressive city, and provides a sense of belonging.

Perceptions were particularly positive with respect to St. John's being a welcoming and inclusive city (44% strongly agree) and feeling like they belong (62% strongly agree).

Residents expressed less conviction towards the City being progressive (28% strongly agree) and being on the right track (27% strongly agree).

% Agree



Q. Do you _____ with each of the following statements?



Section 9:

PERSONAL FINANCES AND COVID-19



HOUSEHOLD FINANCES

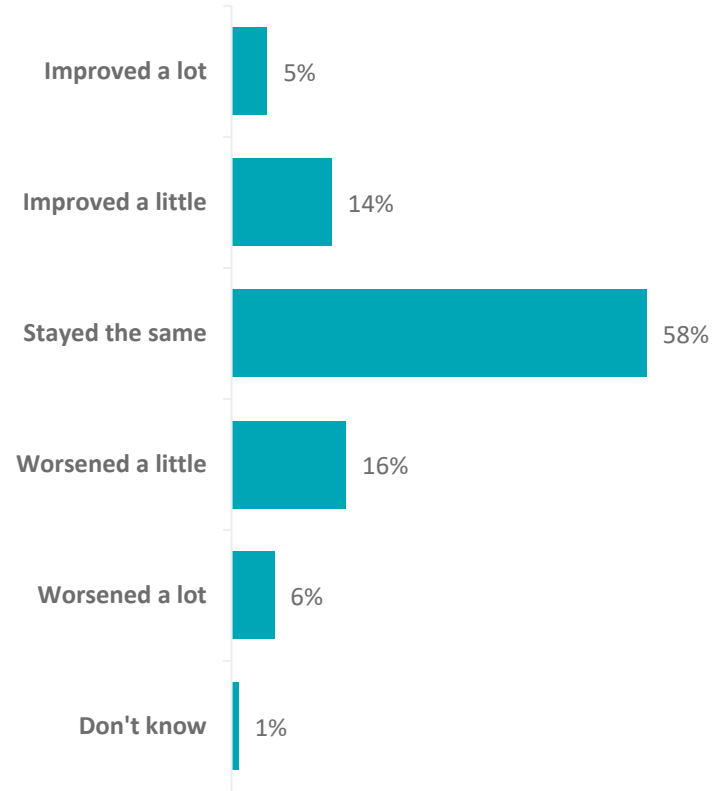
Many households have not seen any change to their household's financial situation in 2020.

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

Overall, 58% indicated their financial situation had stayed the same despite the impacts of the COVID-19 pandemic. Meanwhile, 19% indicated things had improved (14% a little; 5% a lot) while 22% had seen their financial situation worsen (16% a little; 6% a lot).

This was relatively consistent across demographics although the incidence of respondents reporting their financial situation had worsened decreased with age.

Household Finances – Compared to 2019



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

COVID-19 IMPACT ON PERCEPTIONS

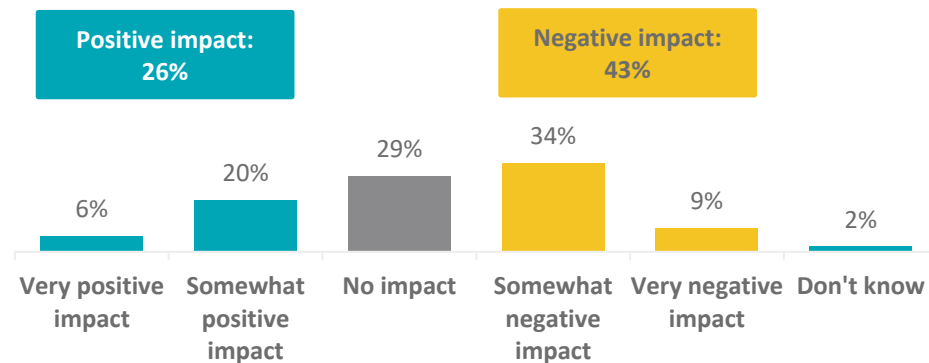
Residents were split on their opinions on the impact of the COVID-19 pandemic on perceptions about quality of life in the City of St. John's.

Residents were asked what impact the COVID-19 pandemic had on their perceptions of quality of life in 2020.

Overall, 26% indicated the pandemic had a positive impact (6% very positive; 20% somewhat positive) on their perceptions of the quality of life in the City.

On the other hand, 43% said the pandemic has had a negative impact on their quality of life (9% very negative; 34% somewhat negative).

Impact on Perceptions of Quality of Life



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

COVID-19 IMPACT ON PERCEPTIONS

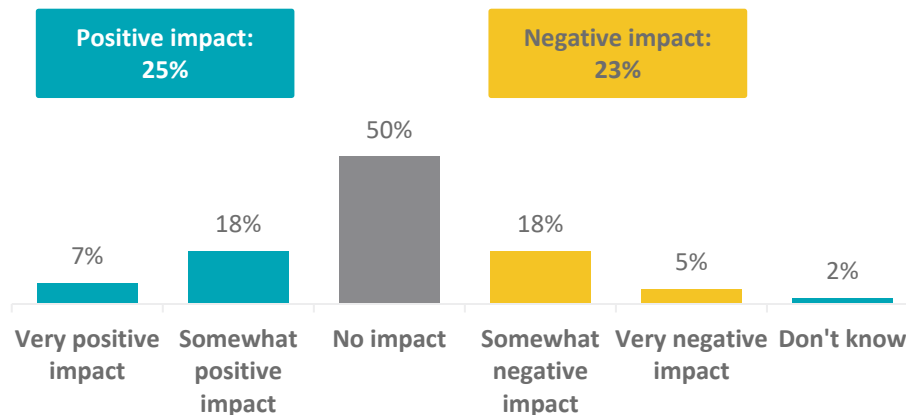
Residents were also divided on their opinions of the impact of COVID-19 with regards to satisfaction with the City's services.

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

A similar proportion (23%) said the pandemic had a negative impact on their satisfaction with the City's services (5% very negative; 18% somewhat negative).

One-half of residents (50%) said the pandemic had **no impact** on their overall satisfaction with the City's services.

Impact on Overall Satisfaction with City Services






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






Section 10:

DEMOGRAPHIC PROFILE

DEMOGRAPHIC PROFILE

		City of St. John's	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
	Male	47%	51%	46%	42%	53%	43%
	Female	52%	48%	53%	57%	46%	57%
	Other/Prefer Not to Say	1%	1%	1%	1%	1%	0%
Age	18 to 34	31%	27%	41%	27%	46%	13%
	35 – 54	32%	32%	30%	33%	19%	51%
	55 plus	36%	41%	29%	40%	35%	37%
	Own	74%	83%	66%	79%	65%	79%
	Rent	26%	17%	34%	21%	35%	21%
 Length of time living in the city.	1 to 5 years	18%	14%	18%	15%	31%	10%
	6 to 10 years	8%	3%	7%	13%	7%	13%
	11 to 15 years	10%	7%	12%	9%	7%	17%
	16 to 20 years	8%	8%	11%	8%	5%	6%
	20 + years	56%	69%	52%	55%	50%	53%

DEMOGRAPHIC PROFILE

		City of St. John's	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
 Children living at home	Yes	27%	24%	23%	29%	21%	38%
	No	73%	76%	77%	71%	79%	62%
 Less than \$50,000 \$50,000 - \$99,999 \$100,000 or more Prefer not to say	Less than \$50,000	22%	14%	24%	27%	31%	14%
	\$50,000 - \$99,999	30%	31%	34%	33%	27%	24%
	\$100,000 or more	38%	43%	34%	30%	34%	49%
	Prefer not to say	10%	12%	9%	9%	8%	13%
 Less than high school Completed high school Some university/college Completed university/college Post graduate studies	Less than high school	3%	1%	5%	6%	1%	1%
	Completed high school	8%	8%	10%	8%	5%	10%
	Some university/college	19%	14%	15%	19%	23%	21%
	Completed university/college	48%	50%	47%	46%	45%	53%
	Post graduate studies	22%	27%	23%	21%	26%	15%



Section 11:

DIFFERENCES BY KEY SUB-GROUPS

DEMOGRAPHIC DIFFERENCES

Age

- Satisfaction with the programs and services provided by the City of St. John's increased with age. The 18-34 age group exhibited the highest level of satisfaction with online services.
 - This is a change from 2018, where the 18-34 age group reported the lowest level of satisfaction with the City's online services compared to the older age groups.
- The COVID-19 pandemic negatively impacted the quality of life of the 18-34 age group more than older age groups.

DEMOGRAPHIC DIFFERENCES

Length of Time Living in the City

- Newer residents (10 years or less) gave the highest ratings (8 or higher) in terms of their overall satisfaction with the programs and services offered by the City. They also gave higher ratings for individual program and service areas.
- Those who have been in the City the shortest amount of time (10 years or less) also had a more positive view of the City's performance on measures such as keeping residents informed and being transparent while exhibiting a higher level of trust in the City.
- This pattern has positively shifted from 2018, where those who had spent 10 years or less in the City had a more negative view of the City's performance on key measures.

DEMOGRAPHIC DIFFERENCES

Home Ownership (74% own their home)

- Consistent with patterns observed in the 2018 survey, homeowners had a significantly more positive view about the quality of life in St. John's compared to renters. This was likely linked in part to income differences between the two groups.
- Renters tended to rate the importance of programs and services higher while also being more satisfied with these individual elements. This finding is consistent with results from the 2018 survey.
- The COVID-19 pandemic negatively impacted the quality of life of renters more than homeowners.

DEMOGRAPHIC DIFFERENCES

Ward

- Results were relatively consistent across wards; however, Ward 1 residents rated their overall quality of life slightly higher compared to respondents from other wards.
- Ward 1 residents were the most likely to say their household financial situation had improved in 2020, suggesting they may have been less impacted financially by the pandemic.
- In terms of overall satisfaction with the City's services and programs, Ward 4 was the most satisfied (68% rated 8 or higher) while Ward 2 was the least satisfied (57% rated 8 or higher).
- In rating the value of the City's services and programs, Ward 4 found the services most valuable (49% rated 8 or higher), while Ward 5 had the least proportion of residents who found the City's programs/services valuable (34% rated 8 or higher).

DEMOGRAPHIC DIFFERENCES

Children Under 17 at Home (27% have kids under 17)

- Results were relatively consistent between those with and without children living at home. Elements related to recreation programs and services were of more importance to this group which was to be expected. They were also more likely to use the online registration system for recreation programs.
- Those with children at home were *slightly more* impacted by COVID-19 (48% said they had a negative impact) versus those without children at home (42%).

DEMOGRAPHIC DIFFERENCES

Income

- The lowest income group (\$50,000) gave the lowest rating for quality of life in the City of St. John's.
- The lowest income group remain the least engaged. They are the least likely to have had any direct contact with the City and the least likely to use the website or apps.
- The lower and middle-income groups (<\$50k and \$50k-\$100k) reported that their quality of life was more negatively impacted by the COVID-19 pandemic compared to the high-income group (\$100k +).

DEMOGRAPHIC DIFFERENCES

Education

- Results for the key indicators were relatively consistent across education levels.
- Consistent with 2018, this year, those with a high school diploma or less were the least engaged group. Specifically, this group is the least likely to have had any direct contact with the City and the least likely to use the website or apps.

Section 12:

CONCLUSIONS AND IMPLICATIONS



CONCLUSIONS & IMPLICATIONS

- ✓ Overall, the City is performing well as evidenced by a number of notable increases in satisfaction* on key indicators in comparison to the 2018 Citizen Survey. This suggests investments made by the City as part of the new strategic directions are paying dividends in the eyes of residents.

- Quality of life increased from 78% in 2018 to 88% in 2020.
- Overall satisfaction with the City's programs and services increased from 70% in 2018 to 85% in 2020.
- Ratings for overall value of tax dollars increased from 56% in 2018 to 70% in 2020.

**refers to satisfaction ratings of 7 or higher*

- ✓ Residents were also more satisfied this year with the City's ability to communicate and be accountable to St. John's residents. Ratings for all communication and accountability metrics* increased compared to the 2018 Citizen Survey which speaks well for the performance of city staff.

- Keeping residents informed – increase from 69% in 2018 to 76% in 2020.
- Providing information in an open and transparent manner – increase from 57% in 2018 to 70% in 2020.
- Being accountable to the public for decisions made – increase from 50% in 2018 to 65% in 2020.
- Managing the City's money responsibly – increase from 40% in 2018 to 56% in 2020.

CONCLUSIONS & IMPLICATIONS

- ✓ **Most residents exhibited some level of trust in the City of St. John's. They also showed strong support for the City's strategic directions, and perceptions of elements related to the City's strategic directions were very positive.**
 - 87% of City residents indicated some level of trust in the City of St. John's, though 45% said they trust the City "a little," indicating that there is some room for improvement on this issue. On a new statement added this year, 65% were satisfied* with the degree to which the City makes decisions that are in the best interest of the community.
 - All areas of the City's strategic direction garnered strong support from residents, from 92% in support of sustainability to a low of 77% for being a connected city.
 - Similarly, key indicators related to strategic direction ranged from 93% to 82% in positive perception, with St. John's being a welcoming and inclusive city (44% strongly agree) and belonging (62% strongly agree) ranking the highest.

CONCLUSIONS & IMPLICATIONS

- ✓ Residents of St. John's are mixed in their experiences of how the pandemic has impacted their lives. This year, they were asked if the COVID-19 pandemic negatively impacted their quality of life, their overall satisfaction with programs and services, and their financial situation.
 - 43% said the pandemic has had a negative impact on their quality of life, while 26% indicated a positive impact.
 - 23% said the pandemic had a negative impact on their satisfaction with the City's services, while 50% of residents said the pandemic had **no impact** on their overall satisfaction with the City's services.
 - Most households were not financially impacted by the pandemic this year - 58% indicated that their financial situation has stayed the same since 2019. In contrast, 22% indicated that their financial situation had worsened in 2020, likely due to impacts from the pandemic (such as job loss, reduced work hours, temporary layoffs, etc.).

- ✓ In light of the pandemic and its potential for negative consequences, the City should ensure that programs and services are easily accessible to all residents (whether online or in-person), that the City is responsive to requests for assistance, and that City staff continue to positively interact with residents.

CONCLUSIONS & IMPLICATIONS

- ✓ **When it comes to public spending, residents are concerned with key areas of infrastructure maintenance, and are also supportive of capital spending on non-essential infrastructure.**
 - Consistent with results of the gap analysis, top mentions of changes residents would like to see implemented that would enhance their overall quality of life were improved snow clearing, including sidewalks (25%), increased road maintenance (10%) and improvements to transit infrastructure (7%).
 - Residents ranked city-owned non-profit housing as the top priority for capital spending on non-essential infrastructure (31% ranked first priority; 61% ranked within their top three), followed by green initiatives and investment in green spaces and outdoor facilities.
 - The majority of residents (87%) support balancing investments between providing basic services and additional programs/services to enhance quality of life.

- ✓ **These should be areas of focus for investment moving forward; a well-rounded budget will ensure focus on a variety of key areas to improve quality of life for all City residents.**