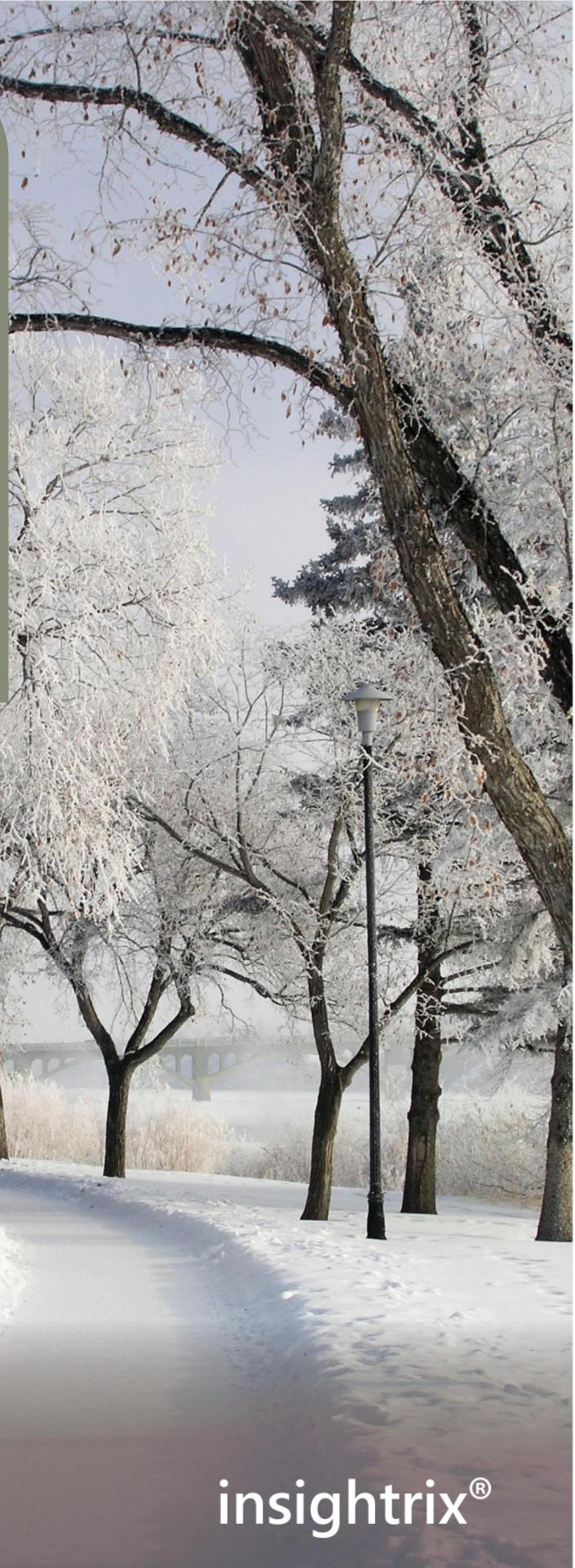


City of Saskatoon

Annual Civic Services Survey

June 2017



EXECUTIVE SUMMARY

The City of Saskatoon has conducted the Annual Civic Services Survey since the early 1990s. The key objectives of the survey include learning the following:

- perceptions of the quality of life in Saskatoon and the direction the City of Saskatoon is heading
- what citizens believe is the most important issue facing the city
- perceptions of satisfaction relating to services provided by the City of Saskatoon
- perceived value of civic services
- future budget preferences (budget balancing and preferences on service levels)
- preferred ways to receive communication from and conduct business with the City
- perceptions of customer service and engagement opportunities with the City
- understanding community volunteering

A total of 500 surveys were completed via telephone (25% through a cell phone list to reach younger and cell phone-only households) and 805 surveys were completed online via Insightrix's online research panel, SaskWatch Research®, between May 15th and June 9th, 2017. The key findings are summarized below.

Quality of Life

- Perceptions of quality of life in Saskatoon are positive with 89% of telephone and 85% of online respondents rating the quality of life as very good or good. These findings are consistent with 2016 (89% telephone, 87% online).
- A majority of residents feel that the quality of life in Saskatoon has remained the same or improved (78% telephone, 76% online) within the past three years. This is relatively consistent with 2016 (76% telephone, 80% online).
- Most residents (79% telephone, 74% online) agree with the sentiment that the City is broadly on the right track to making Saskatoon a better city 10 years from now. This is consistent with 2016 findings (80% telephone, 70% online).

Important Issues Facing the City

- When asked to name the most important issue facing the city unprompted (i.e. without a list provided to respondents), roads and sidewalks (20% telephone, 14% online) is most commonly mentioned, followed by crime / policing (10% telephone, 20% online), taxation levels (9% telephone, 12% online), social issues (7% telephone, 9% online) and spending (7% for both telephone and online).
- Fewer residents note that roads and sidewalks repair is the most important issue facing the city this year (down 12 percentage points from 32% among telephone respondents and down 8 percentage points from 22% among online respondents) while more cite taxation or spending as

the most important issue this year (up between 4 and 8 percentage points among various respondent groups).

Satisfaction & Importance with Civic Services

- Overall satisfaction with the level of service provided by the City of Saskatoon remains high (88% telephone, 85% online compared to 88% telephone and 83% online in 2016).
- Historically, citizens have been asked about the importance of a number of service areas as well as their satisfaction with the City's performance in each of these areas. Since 2015, importance questions have not been asked but results from 2014 are summarized below.
- Services deemed to be most important in 2014 included maintenance of major roadways and freeways, repair of watermain breaks, snow & ice road maintenance, traffic management, quality of drinking water, fire protection, treatment of sewage, street maintenance in one's neighbourhood, planning for growth and development, garbage collection, and police services.
- In 2017, satisfaction is strongest for quality of drinking water, fire protection, Saskatoon Light & Power electrical services reliability, availability of City parks, garbage collection (black bin) and recycling (blue cart or bin). A number of increases in satisfaction are noted among online respondents this year including: repair of watermain breaks, removing contaminants from waste-water, maintenance of major roadways and freeways, street maintenance in one's neighbourhood, snow and ice road maintenance, parking services, outdoor swimming pools, and mosquito control. No significant declines are observed this year.
- Based on the importance (from 2014) and satisfaction (from 2017) ratings of specific services, key strengths (high importance and high satisfaction) and weaknesses (high importance and comparatively lower satisfaction) of Saskatoon's civic services are listed below. Key strengths and weaknesses have remained the same for three years (since 2015).

Key Strengths of Civic Services	Key Weaknesses of Civic Services
<ul style="list-style-type: none">• Quality of drinking water• Fire protection• Electrical services reliability*• Garbage collection (black bin)• Removing contaminants from waste-water• Repair of watermain breaks• Police services (policing, safety and law enforcement)• Recycling (blue bin or cart)	<ul style="list-style-type: none">• Maintenance of major roadways and freeways in the city• Mosquito control• Affordable housing• Street maintenance in your neighbourhood• Snow & ice road maintenance• Planning for growth and development• Traffic management, (traffic flow, signage etc.)

*"Electrical services reliability" is reported for Saskatoon Light & Power customers only.

Methods of Communication

- Citizens prefer using a mix of sources to receive information about the City of Saskatoon. Most commonly, Saskatoon.ca and emails from the City are the preferred information sources for both telephone and online respondents. The media, Facebook, utility bill stuffers, flyers, print ads, radio ads, and TV ads are also common preferences. Findings are largely consistent with 2016.
- Preferred methods of receiving information from the City continue to differ by age range with younger residents more commonly naming digital sources and older residents citing traditional methods.
- New this year, residents were asked to rate their satisfaction with the overall quality of City information and communications. Overall, satisfaction is strong among both telephone and online respondents (85% and 88%, respectively).

Interactions with the City

- Roughly one half of all residents report having had contact with or have participated in a City activity within the past 12 months, consistent with 2016.
- Those who have had contact with or participated in a City engagement activity within the past 12 months provide high ratings for City staff being courteous, helpful and knowledgeable, and practicing open and accessible government. Online respondents' assessments are weaker in most areas.
- Those who have not had contact with the City in the past 12 months also most commonly perceive City staff as being courteous, helpful and knowledgeable, offering high quality customer service and making customer service a priority. Online respondents tend to have less favourable impressions in all areas.
- A large majority of citizens say they prefer conducting business with the City via telephone, although this method of interaction is steadily declining (down 16 points among telephone respondents within the past two years). Email is also a common preference for communicating with the City, along with the City website. Social media channels rise in interest among online respondents.

Budget Input

- When asked which of the following methods the City could use to balance its budget, most residents prefer either increasing property taxes, increasing user / services fees, adding new user / service fees, or a combination of these methods (presently 69% among telephone respondents and 58% among online respondents).
- The proportion of residents supportive of new or increased fees, taxes, or a combination of both as their preferred method for balancing the budget has increased in 2017 among online respondents (up 7 percentage points from 51% in 2016).

- Citizens were next asked if they believe the City should provide more, less, or the same amount of service in several different civic areas. A majority would like to see additional services provided for road maintenance and affordable housing. A smaller proportion would also like to see more services provided for snow & ice management, traffic management, transit, growth planning, and policing.
- The proportion of respondents wanting to see more services has decreased for most categories compared to 2016, especially road maintenance. This correlates with fewer citizens who name roads and sidewalks as the most important issue facing the city this year.

Perceived Value

- The majority of residents believe they receive good value for what they pay in property taxes (84% telephone, 76% online). Perceptions of the value of civic services have increased since 2014, when this question was last asked, especially among online respondents (up 5 points from 79% among telephone respondents and 16 points from 60% among online respondents).
- Claimed knowledge levels of how City tax dollars are spent is moderate, with sizable proportions saying they are either somewhat knowledgeable or not very knowledgeable.

Citizen Volunteerism

- Roughly six in ten Saskatoon residents claim to volunteer to some degree each month. These findings are consistent with 2016 (the first year this question was asked).

TABLE OF CONTENTS

Executive Summary.....	i
Background & Methodology	1
Background & Objectives.....	1
Methodology.....	1
Sampling and Data Collection Approach	1
Telephone Sampling	2
Online Sampling.....	2
Completed Questionnaires by Age.....	2
Questionnaire Review	3
Data Collection	3
Reporting Notes.....	3
Study Results.....	5
Quality of Life & Direction of the City.....	5
Perceived Quality of Life.....	5
Tracking Perceived Quality of Life	5
Perceived Quality of Life by Home Ownership (online respondents only)	6
Change in Quality of Life in Saskatoon	7
Suggestions to Improve Quality of Life	8
Trended Suggestions to Improve Quality of Life	10
On the Right Track	11
Important Issues Facing the City.....	12
Primary Issues.....	12
Tracking Primary Issues	13
Overall Satisfaction with City Services.....	14
Overall Satisfaction	14
Tracking Overall Satisfaction	15
Satisfaction and Importance with Specific Civic Services	16
Categorization of Services Evaluated	16
Wording Changes Between 2015 and 2016	17
Satisfaction with Transportation & Utility Services.....	18
Satisfaction with Community Services	19
Satisfaction with Waste Management Services	20
Satisfaction with Other Services.....	20

Tracking Satisfaction with Civic Services	21
Mapping Importance and Satisfaction	24
Quadrant Analysis.....	25
 Methods of Communication	28
Preferred Information Sources.....	28
Tracking Preferred Information Sources	29
Preferred Information Sources by Age (online respondents only)	31
Satisfaction with Overall Quality of City Information and Communications	32
 Interactions with the City	33
Incidence of Contacting the City of Saskatoon/Participation in City Engagement Activities ...	33
Perceptions of City based on Personal Experience	34
Perceptions of City based on Impressions	35
Preferred Method of Conducting Business with or Contacting the City of Saskatoon	38
 Budget Input	39
Budget Balancing	39
Budget Balancing – Trended.....	40
Preferences on Level of Civic Services.....	41
Preferences on Level of Civic Services – More Service Trended.....	43
Preferences on Level of Civic Services – Less Service Trended.....	44
 Perceived Value	45
Perceived Value of City Programs and Services	45
Trended Perceived Value of City Programs and Services.....	46
Knowledge of Tax Dollar Spending.....	47
 Citizen Volunteerism.....	48
 Demographics	49
Age Range	49
Type of Accommodations.....	49
Electricity Provider.....	50
Location of Residence.....	50
Suburban District Area (SDA).....	50
 Appendix	54
Importance of Transportation & Utility Services	54
Importance of Community Services	55
Importance of Waste Management	56
Importance of Other Services.....	56
Tracking Importance of Services	57

BACKGROUND & METHODOLOGY

BACKGROUND & OBJECTIVES

The City of Saskatoon has conducted an annual survey on civic services with Saskatoon residents since the early 1990s. Originally, this research was conducted in the fall. Starting with the 2011 wave of the survey, research has been conducted in the spring.

The objectives of the 2017 survey include learning the following:

- perceptions of the quality of life in Saskatoon and the direction the City of Saskatoon is heading
- what citizens believe is the most important issue facing the city
- perceptions of satisfaction relating to services provided by the City of Saskatoon
- perceived value of civic services
- future budget preferences (budget balancing and preferences on service levels)
- preferred ways to receive communication from and conduct business with the City
- perceptions of customer service and engagement opportunities with the City
- understanding community volunteering

METHODOLOGY

Sampling and Data Collection Approach

Historically, this study was conducted via telephone interviews with randomly selected households within Saskatoon city limits. In 2010, it was determined that both online and telephone data collection methods would be utilized in order to reach cell phone-only households and to address declining participation rates in telephone surveys in general.

Online research has become more commonplace and many research companies access research panels to engage respondents online. Insightrix launched its Saskatchewan-based online panel, SaskWatch Research®, in 2008. The panel currently represents more than 15,000 Saskatchewan residents, with more than 4,600 residing in Saskatoon.

There are slight differences in respondent behaviours in online studies when compared with telephone studies. Specifically, online respondents tend to offer slightly lower ratings on scale questions such as satisfaction or likelihood of usage. This trend has been noted in several tandem studies conducted by Insightrix where the same set of questions is asked of a sample of telephone and online respondents. Therefore, to maintain trending capabilities with the historical data from the Annual Civic Services Survey, both telephone and online methods have been used since 2010.

Telephone Sampling

The telephone sampling approach has remained unchanged since 2009 to allow for direct comparisons year over year. Specifically, 500 interviews are conducted with randomly selected households throughout the city. In 2015, cell phone records were added in an effort to reach younger and cell phone-only households and this approach has been maintained in 2016 and 2017. One quarter (25%) of telephone respondents are from this list. For consistency with previous years, quotas have not been set by age and gender. As a result, the distribution of responses does not precisely match the general adult population within the city. However, the distribution of respondents in the 2017 wave is consistent with previous waves, meaning that results are directly comparable between time periods. Similarly, the data has not been weighted to reflect the actual distribution of the population in the city by age and gender, as this was not done in previous waves.

Online Sampling

For the online study, given that the age and gender of panel members are known, Insightrix is able to set precise quotas by both demographic variables to ensure that a close match with the general population is achieved. Due to the cost savings associated with conducting online research, in 2011 the sample size was increased from 500 to 800 respondents to allow for more statistically accurate findings and more detailed comparisons by demographic groups. This increased sample size has since been maintained. As respondent proportions are very close to the census each year, there is no need to weight the data.

Completed Questionnaires by Age

The following table outlines the distribution of respondents:

Demographics		Online Survey		Telephone Survey	
		Count	Percent	Count	Percent
Age	18-34	273	33.9%	85	17.0%
	35-54	304	37.8%	207	41.4%
	55+	228	28.3%	208	41.6%
Total		805	100.0%	500	100.0%

Questionnaire Review

All tracking sections of the survey instrument have remained unchanged in order to maintain the ability to track results with previous years. In an effort to manage the survey length, the question asking citizens to rate the importance of various civic services has been omitted for the past three waves (2015, 2016 and 2017). Changes in importance of civic services are typically minimal year over year and as such, 2014 data has been used as reference where appropriate throughout the report. In 2017, a question regarding value of property taxes paid to the City was added back in after being removed from the study in 2015.

Data Collection

Telephone

Data was collected via telephone interviews with randomly selected households within Saskatoon city limits. Household contact information was provided by ASDE Survey Sampler, Inc., a reputable Canadian sample provider. Trained telephone interviewers contacted potential respondents and asked for their voluntary participation in the study.

Online

Randomly selected SaskWatch Research® panel members living within the city were invited to participate in the research study via an email message which included a link to the online survey. Those who did not respond within one week of receiving the invitation were sent a reminder invitation.

Dates and Margins of Error

Data was collected between May 15th and June 9th, 2017. A total of 500 surveys were completed via telephone and 805 surveys were completed online. The response rates are 40% for the telephone survey and 45% for the online survey. The margin of error for the telephone research is ±4.4 percentage points at a 95% confidence interval (19 times out of 20). Calculating a margin of error for the online study is not applicable as online research is considered a non-probability proportional sampling technique.

Reporting Notes

- Because of the larger sample size, demographic cross-tabulation results have been based solely on online respondents.
- With this in mind, each survey question was analyzed by all appropriate demographic variables. Notable differences have been highlighted in this report using "▲" and "▼". A standard alpha value of less than 0.05 is considered statistically significant. This means that there is less than a 5% chance that the results would have occurred by chance.
- Due to rounding, not all results will add to exactly 100%.
- Results for questions with multiple allowed responses may total more than 100%, as respondents were able to choose more than one option.

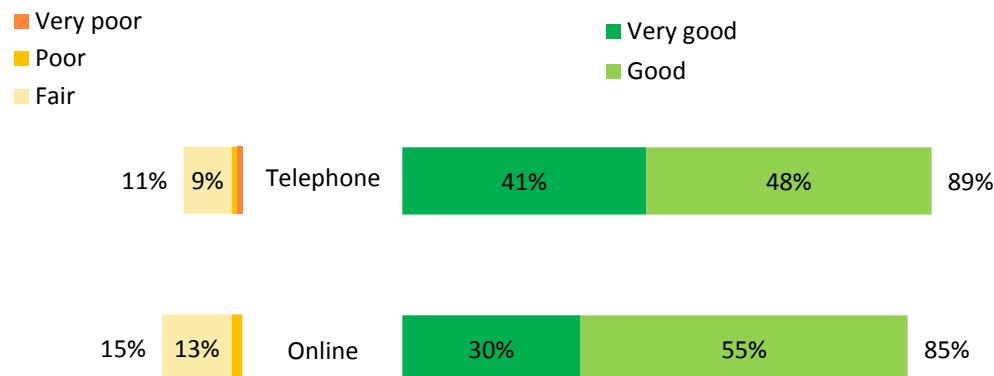
- Each question includes a base description detailing the number of respondents who answered each question (n=#).
- Open-ended questions have been themed and coded into categories. The percentages from individual codes could total more than 100%, as comments from each respondent could be relevant to more than one code.
- Shading is used in several tables to illustrate variations of the numbers within each column(s) of the table. Cells shaded in dark green signify comparatively higher numbers within the column and bright yellow signify comparatively lower numbers within the column. The shading is auto-created by MS Word and shading within one column is not directly comparable to the shading within other columns of the same table or other tables in the report.

STUDY RESULTS

QUALITY OF LIFE & DIRECTION OF THE CITY

Perceived Quality of Life

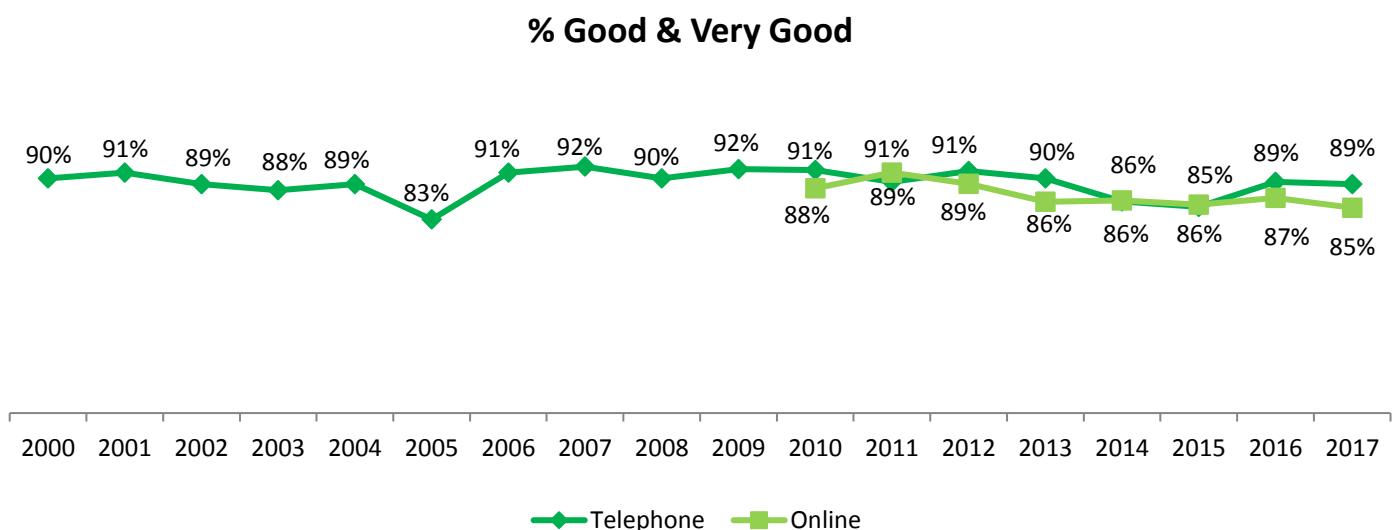
Perceptions of quality of life in Saskatoon are positive with 89% of telephone and 85% of online respondents rating the quality of life as very good or good. Few rate the quality of life in Saskatoon as fair, poor or very poor.



1. Overall, how would you rate the quality of life in Saskatoon? Base: All respondents, telephone: n=500, online: n=805.

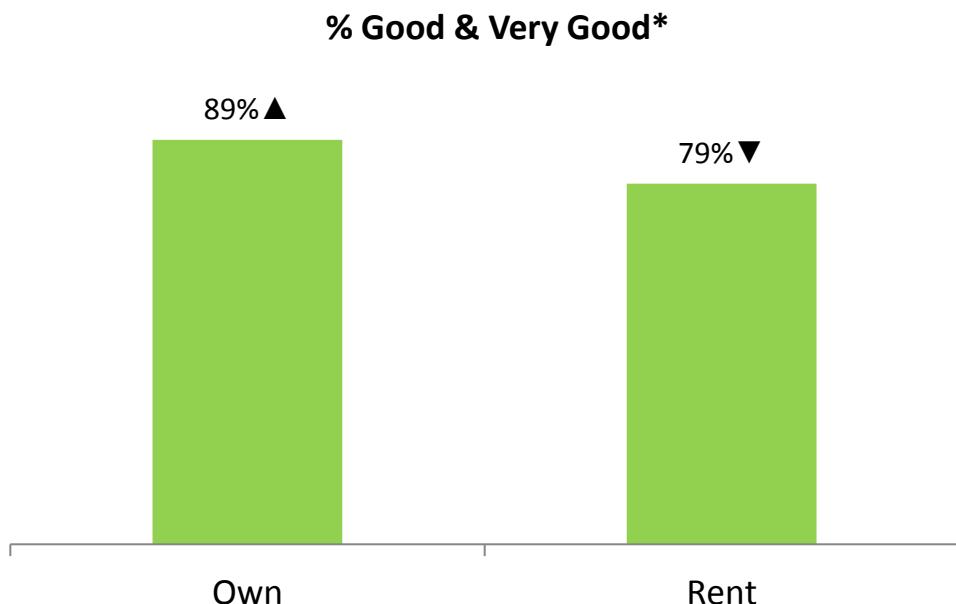
Tracking Perceived Quality of Life

Perceptions of quality of life in Saskatoon have held steady for both telephone and online respondents.



Perceived Quality of Life by Home Ownership (online respondents only)

Homeowners are more likely to perceive Saskatoon's quality of life as higher than those who rent their home.

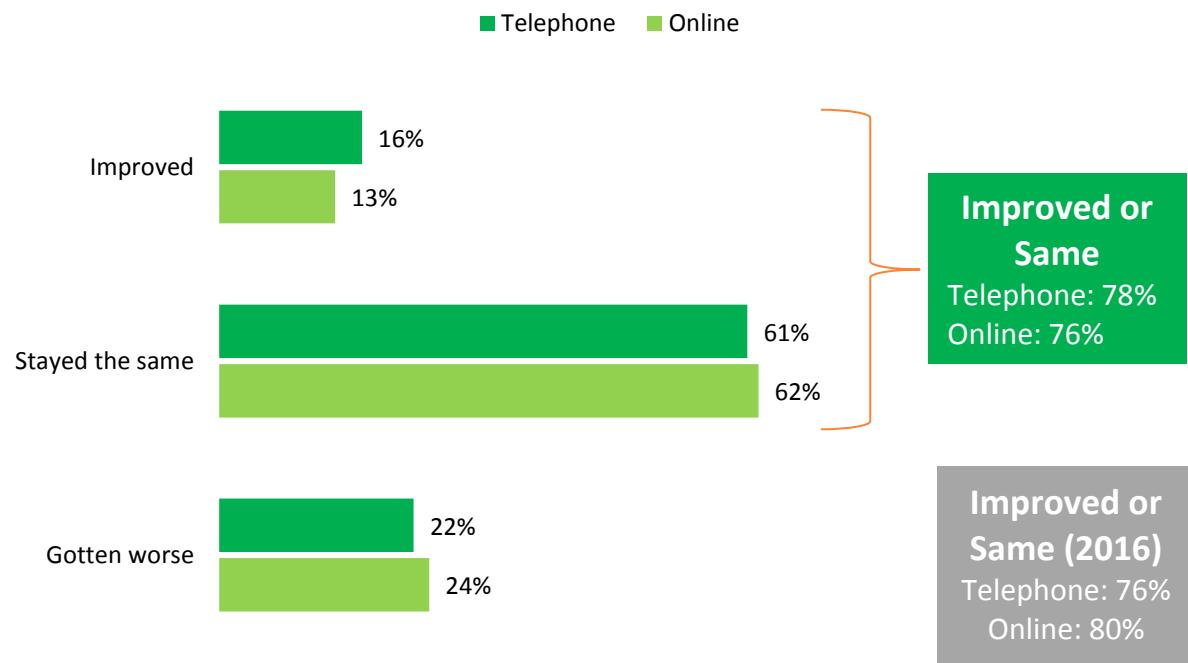


1. Overall, how would you rate the quality of life in Saskatoon? Base: All respondents, online: n=805. *Responses from "neither" and "prefer not to say" are not shown.

* The arrows indicate a statistically significant difference between quality of life perceptions among those who own or rent their home among 2017 respondents.

Change in Quality of Life in Saskatoon

A majority of residents feel that the quality of life in Saskatoon has remained the same or improved (78% telephone, 76% online) within the past three years. This is relatively consistent with 2016 (the first year this question was asked).

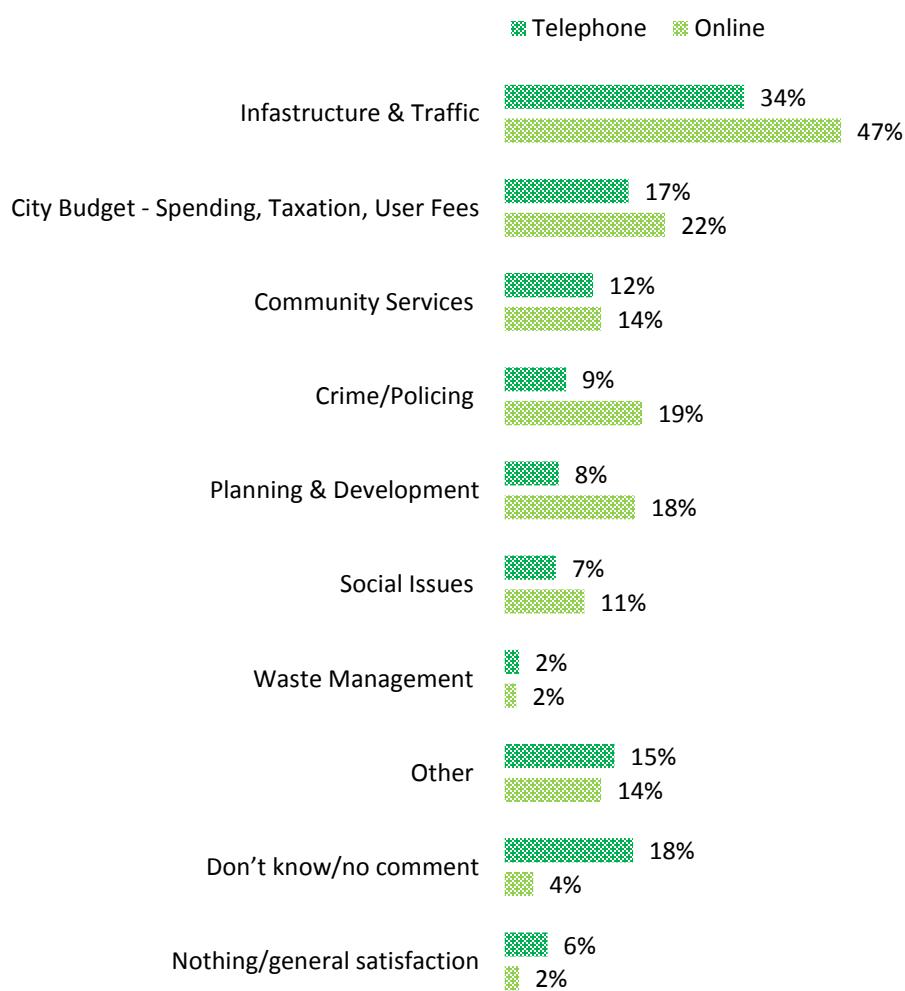


3. Do you feel that the quality of life in Saskatoon in the past three years has... Base: All respondents, excluding "unsure / don't know" responses, telephone: n=485, online: n=791.

Suggestions to Improve Quality of Life

A variety of suggestions are provided by citizens when asked to identify ways in which the quality of life could be improved in Saskatoon. Verbatim responses have been categorized into themes and those themes have been grouped into broad groupings. The graph below outlines the broad groupings while the subsequent page provides detailed themes. Most commonly, suggestions to improve the quality of life in Saskatoon centre on infrastructure & traffic issues, the City budget, community services, crime and policing, planning & development and social issues.

Suggestions to Improve Quality of Life (nets)



5. Thinking about all the different things that contribute to the quality of life in Saskatoon, what specific actions do you think the City of Saskatoon could take to improve the quality of life? Base: All respondents, telephone: n=500, online, n=805. *New question added in 2016.

Detailed findings below illustrate the most common suggestions to improve the quality of life in the city include improving road conditions, addressing crime and policing, improving traffic flow and improving public transit. Several other suggestions have also been listed below.

Suggestions to Improve Quality of Life	Telephone	Online
Infrastructure & Traffic (net)	34%	47%
Improve road conditions/potholes	14%	21%
Design better traffic flow/control (i.e., bridges, bypasses, etc.)	8%	15%
Improve public transit	8%	15%
Improve active transportation/bike lanes	6%	7%
Better/more frequent snow removal/street cleaning	5%	5%
Improve infrastructure-general	3%	4%
Improve/more accessible parking	2%	3%
City Budget – Spending, Taxation, User Fees (net)	17%	22%
Improve tax fairness	13%	12%
Better/more sensible spending	4%	9%
More affordable user fees (i.e., for recreation, buses, etc.)	3%	6%
Community Services (net)	12%	14%
More/better access to leisure activities/community events	8%	9%
Better parks/increase green space	7%	6%
Crime/Policing (net)	9%	19%
Crack down on crime/better policing (i.e., more officers)	9%	19%
Planning & Development (net)	8%	18%
More affordable housing/homelessness	4%	9%
Better planning for growth/development	3%	6%
Revitalize older neighbourhoods/reduce urban sprawl	1%	5%
Social Issues (net)	7%	11%
Address poverty/cost of living	4%	6%
Better access to healthcare (mental, physical)	2%	3%
Encourage equality/race relations	<1%	2%
Better access to grocery stores/food (i.e., for downtown)	1%	2%
Waste Management (net)	2%	2%
Better garbage/recycling program	2%	2%
Other (net)	15%	14%
Increase employment	4%	2%
Invest in education/schools	2%	2%
Other	11%	9%
Don't know/no comment	18%	4%
Nothing/general satisfaction	6%	2%

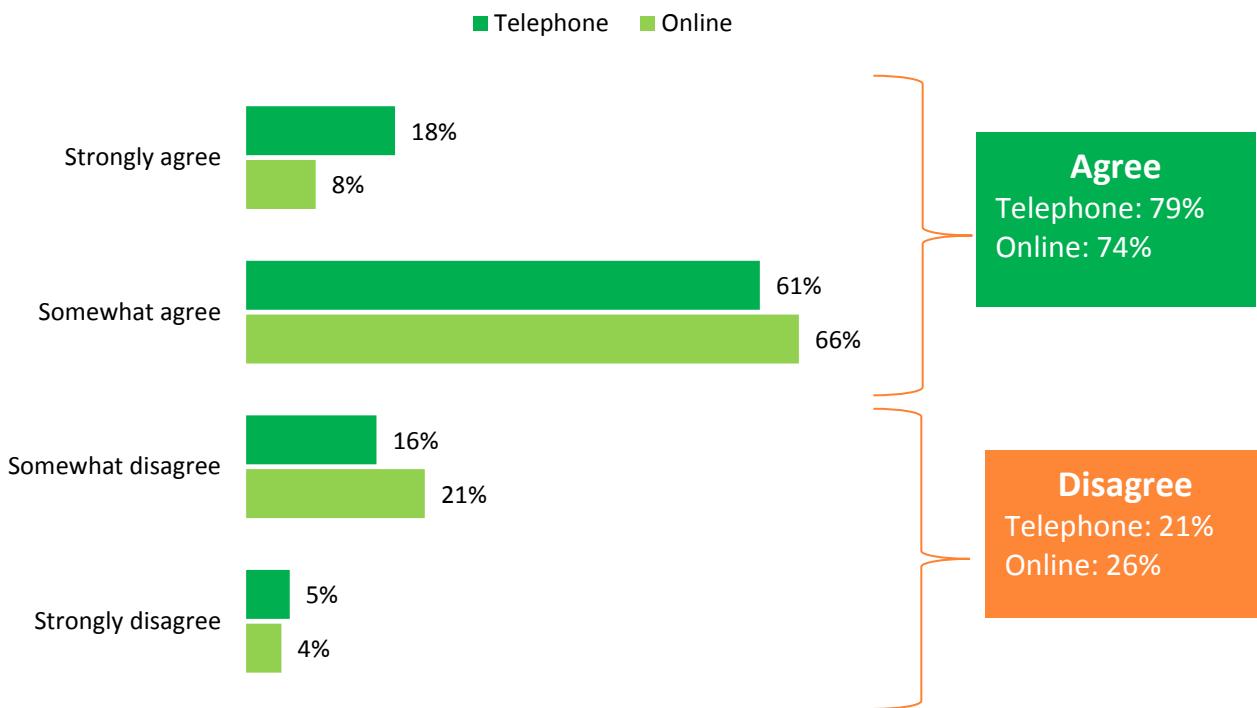
Trended Suggestions to Improve Quality of Life

Suggestions to improve the quality of life in Saskatoon hold relatively steady with 2016, although fewer telephone respondents offer suggestions related to infrastructure & traffic, planning & development and social issues this year.

Suggestions to Improve Quality of Life - Trended	Telephone		Online	
	2016	2017	2016	2017
Infrastructure & Traffic (net)	41%▲	34%▼	51%	47%
City Budget – Spending, Taxation, User Fees (net)	14%	17%	18%	22%
Community Services (net)	12%	12%	16%	14%
Crime/Policing (net)	11%	9%	22%	19%
Planning & Development (net)	17%▲	8%▼	24%	18%
Social Issues (net)	14%▲	7%▼	14%	11%
Waste Management (net)	2%	2%	3%	2%
Other (net)	15%	15%	17%	14%
Don't know/no comment	17%	18%	4%	4%
Nothing/general satisfaction	4%	6%	1%	2%

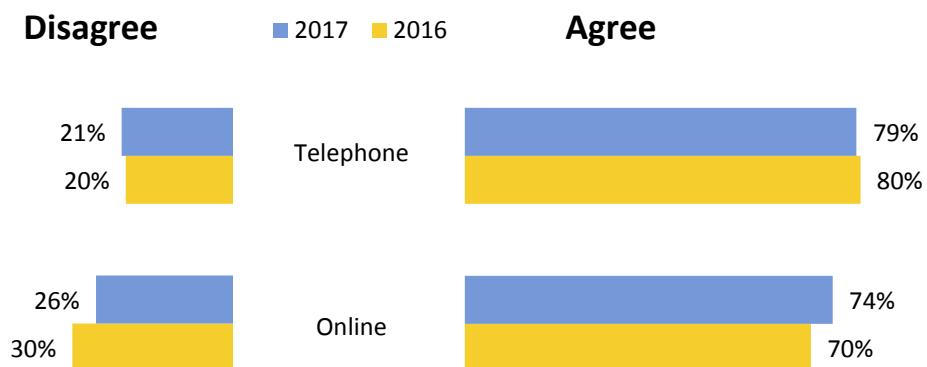
On the Right Track

Most residents agree with the sentiment that the City is broadly on the right track to making Saskatoon a better city 10 years from now. Telephone respondents are slightly more likely to agree with this assessment than online respondents.



4. Broadly speaking, to what extent do you agree or disagree that the City of Saskatoon is on the right track to being a better city in 10 years from now? Base: All respondents, telephone: n=500, online: n=805.

Findings are consistent with 2016, the first year in which this question was asked.

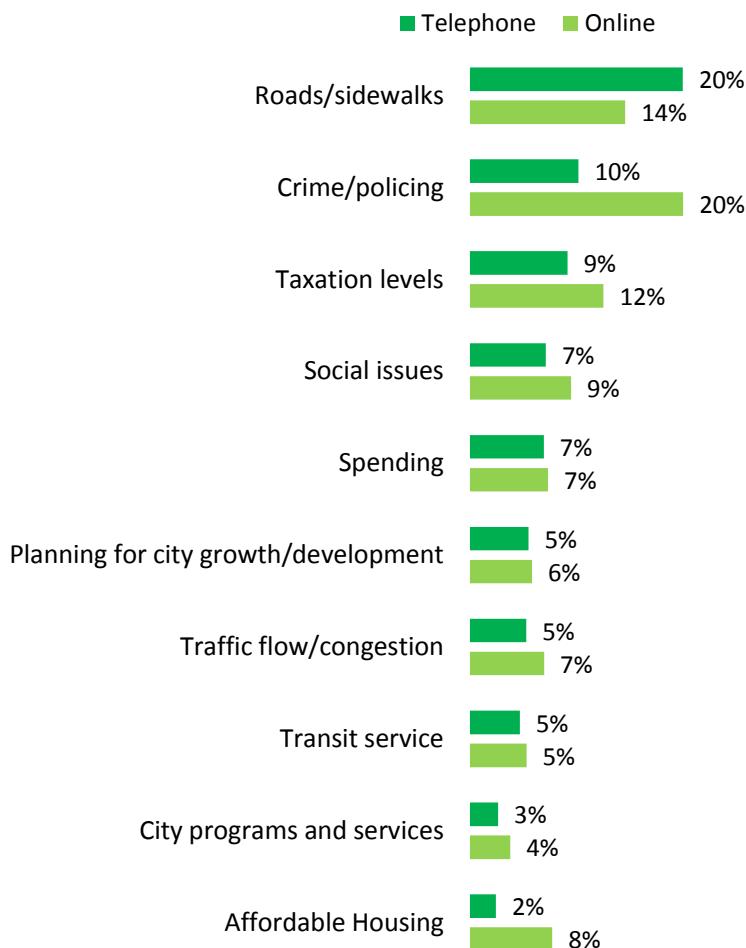


IMPORTANT ISSUES FACING THE CITY

Primary Issues

When asked to name the most important issue facing the city unprompted (i.e. without a list provided to respondents), roads and sidewalks is most commonly mentioned, followed by crime/policing, taxation levels, social issues and spending.

Top 10 Primary Issues



2. In your opinion, what is the single most important issue facing the City of Saskatoon, that is, the one issue you feel should receive the greatest attention? Base: All respondents, telephone: n=500, online: n=805.

Tracking Primary Issues

Fewer residents note that roads and sidewalks repair is the most important issue facing the city this year while more cite taxation or spending as most important issue this year.

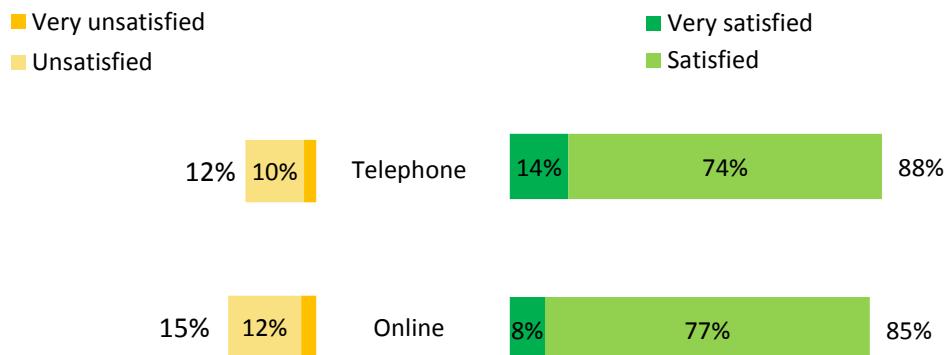
Primary issues	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Telephone Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Online Difference from 2016
Roads/sidewalks	37%	33%	32%▲	20%▼	-12%	32%	28%	22%▲	14%▼	-8%
Crime/policing	9%	12%	9%	10%	1%	11%	17%	18%	20%	2%
Taxation levels	5%	5%	5%▼	9%▲	4%	5%	5%	4%▼	12%▲	8%
Social issues	3%	4%	6%	7%	1%	5%	7%	8%	9%	1%
Spending	-	2%	2%▼	7%▲	5%	-	5%	3%▼	7%▲	4%
Planning for city growth/development	6%	6%	6%	5%	-1%	9%	8%	6%	6%	0%
Traffic flow/congestion	8%	8%	7%	5%	-2%	10%	9%	10%	7%	-3%
Transit service	2%	4%	5%	5%	0%	3%	4%	5%	5%	0%
City programs and services	-	1%	1%	3%	2%	-	3%	2%	4%	2%
Affordable Housing	6%	3%	5%	2%	-3%	9%	5%	8%	8%	0%

Cells shaded in dark green signify comparatively higher numbers within the column and bright yellow signify comparatively lower numbers within the column. The shading is auto-created by MS Word and shading within one column is not directly comparable to the shading within other columns of the same table or other tables in the report. Refer to the notes section of the report for details on the shading used in this table.

OVERALL SATISFACTION WITH CITY SERVICES

Overall Satisfaction

Overall satisfaction with the delivery of service provided by the City of Saskatoon is strong. Less than two in ten report being unsatisfied.

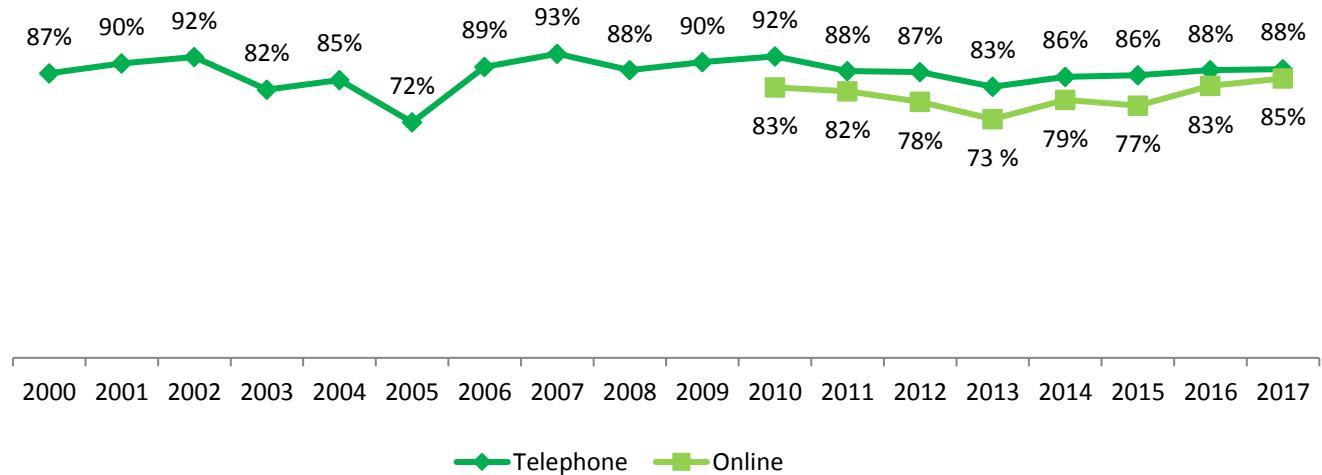


6. Generally speaking, how satisfied are you with the delivery of City services? Base: All respondents excluding "unsure/don't know," telephone: n=497, online: n=805.

Tracking Overall Satisfaction

Overall satisfaction with the delivery of City services holds steady among telephone respondents and continues to increase among online respondents.

% Satisfied & Very Satisfied



SATISFACTION AND IMPORTANCE WITH SPECIFIC CIVIC SERVICES

Categorization of Services Evaluated

Historically, Saskatoon residents have been asked to rate the importance of a wide range of civic services offered by the City as well as the City's performance in delivering these services. For the past three waves (2015-2017), the importance question was omitted from the study to allow for additional time to address new questions. Because the importance of civic services does not typically vary greatly year over year, responses to the importance questions from 2014 are included in the Appendix of this report for reference.

For the importance question, a ten-point scale was used where "1" means "not at all important" and "10" means "very important". For the City's performance question, a ten-point scale is used where "1" means "very poor" and "10" means "excellent". For the ease of presentation, these services have been grouped into the following categories.

Transportation & Utility Services

- Maintenance of major roadways and freeways in the city
- Snow & ice road maintenance
- Traffic management, (traffic flow, signage etc.)
- Street maintenance in your neighbourhood
- Sidewalk maintenance in your neighbourhood
- Parking services
- Public transit
- Maintenance of back lanes
- Repair of watermain breaks
- Quality of drinking water
- Removing contaminants from waste-water to make it suitable for disposal in the natural environment
- Electrical services reliability
- Accessibility of services for people with disabilities*

Community Services

- Planning for growth and development
- Affordable housing
- Indoor pools/community centres/leisure facilities
- Outdoor swimming pools
- Paddling pools and spray parks
- Indoor ice rinks
- Mosquito control
- Maintenance of city trees and parks
- Availability of City parks
- Funding for community based organizations
- Funding for non-profit arts and cultural groups
- Bylaw enforcement
- Control of dangerous and nuisance animals
- Recreation programs and services
- Parks (playgrounds, green spaces, pathways, tree services)*

Other Services

- Fire protection
- Police services (Policing, safety and law enforcement)
- Customer service (such as handling of inquiries, making payments, etc.)
- Online services offered by the City through Saskatoon.ca

Waste Management

- Garbage collection (black bin)
- Recycling (blue cart or bin)
- Landfill services

* New items added in 2016

Wording Changes Between 2015 and 2016

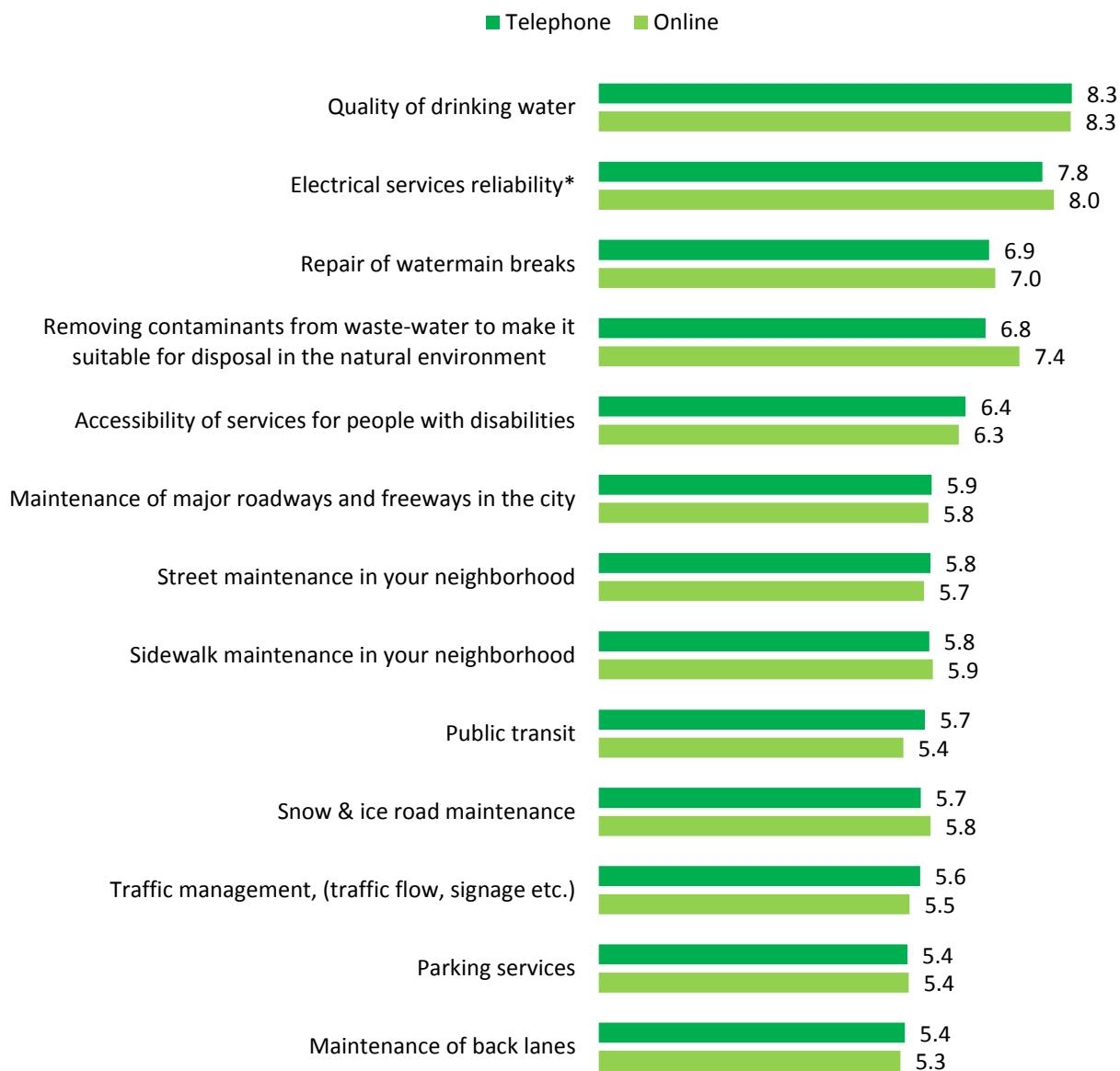
In 2016, the wording of some attributes changed slightly and two new attributes were added. The table below highlights these alterations.

Previous wording	New wording
Maintenance of major roadways and freeways	Maintenance of major roadways and freeways in the city
Traffic management	Traffic management (traffic flow, signage, etc.)
Parking	Parking services
Public transportation	Public transit
Treatment of sewage	Removing contaminants from waste-water to make it suitable for disposal in the natural environment
Indoor pools / community centres	Indoor pools / community centres / leisure facilities
Accessibility of City parks	Availability of City parks
Funding for arts and cultural groups	Funding for non-profit arts and cultural groups
Recycling	Recycling (blue cart or bin)
Online services	Online services offered by the City through Saskatoon.ca
Customer service	Customer service (such as handling of inquiries, making payments, etc.)
n/a	Parks (playgrounds, green spaces, pathways, tree services)
n/a	Accessibility of services for people with disabilities

Satisfaction with Transportation & Utility Services

Residents were asked to rate the City's performance on a ten-point scale in delivering civic services.

Quality of drinking water, electrical services reliability, repair of watermain breaks and removing contaminates from waste-water are the areas of Transportation & Utility services with which residents are most satisfied.

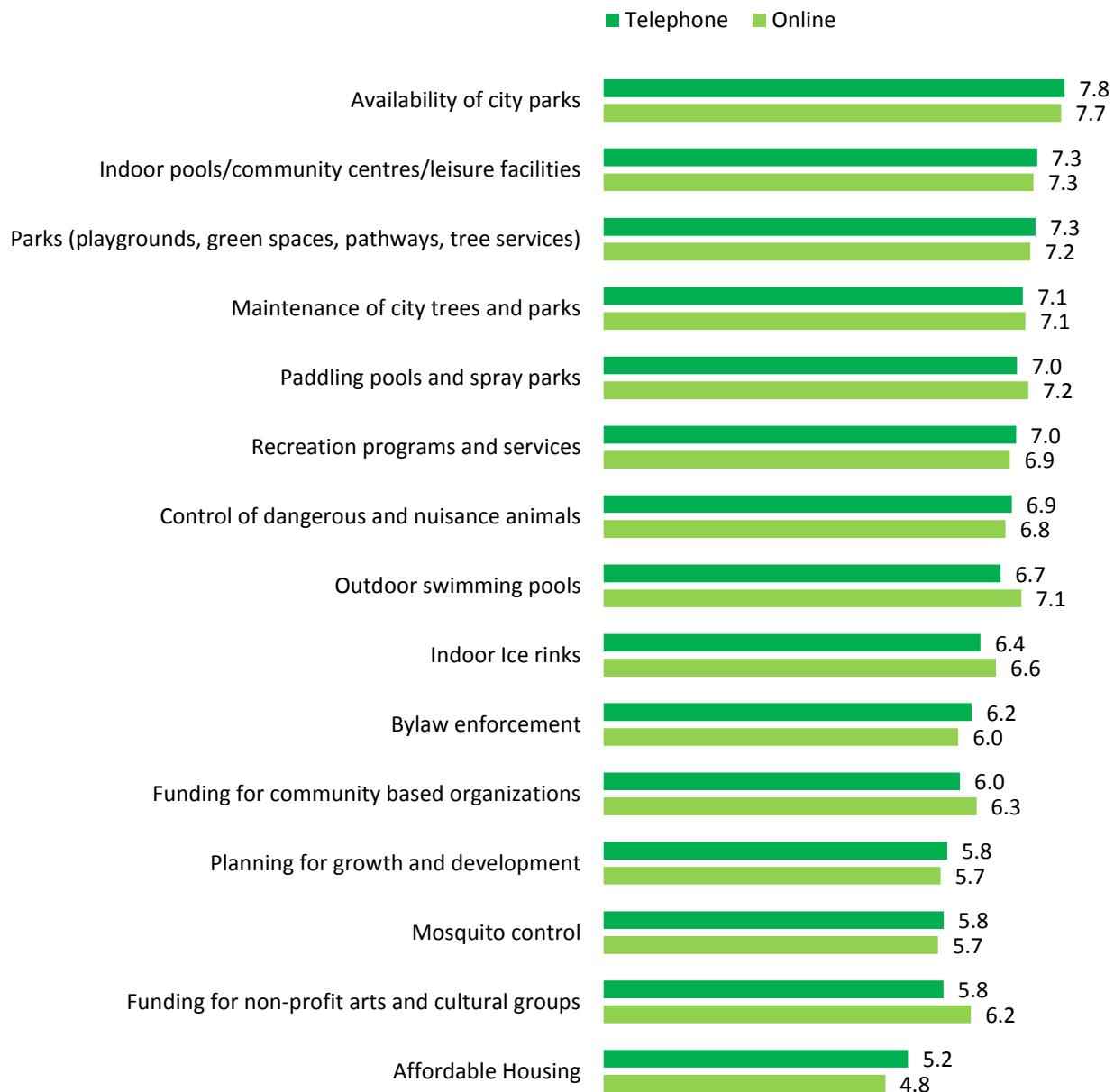


7. Please rate how well the City of Saskatoon is doing in delivering each of these services. Base: All respondents excluding "don't know," telephone: n=315 to 500, online, n=394 to 802.

*"Electrical services reliability" is reported for Saskatoon Light & Power customers only, telephone: n=186, online: n=295.

Satisfaction with Community Services

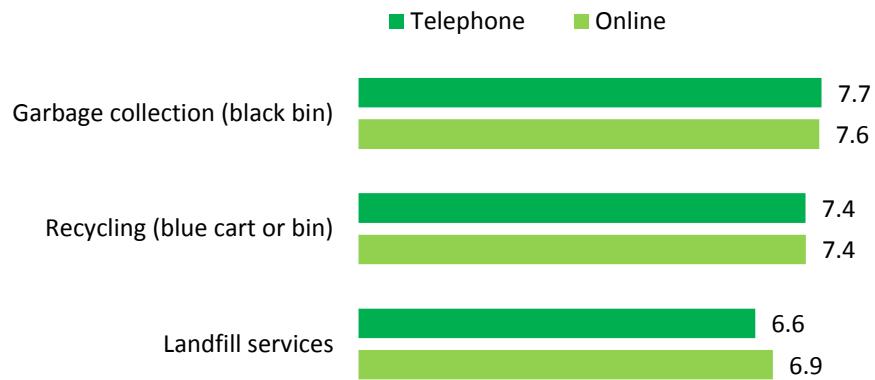
Citizens are highly satisfied with City parks (both in availability and contents within) and indoor pools/ community centres/ leisure facilities, while affordable housing garners the least satisfaction within the Community Services category.



7. Please rate how well the City of Saskatoon is doing in delivering each of these services. Base: All respondents excluding "don't know," telephone: n=338 to 490, online, n=402 to 781.

Satisfaction with Waste Management Services

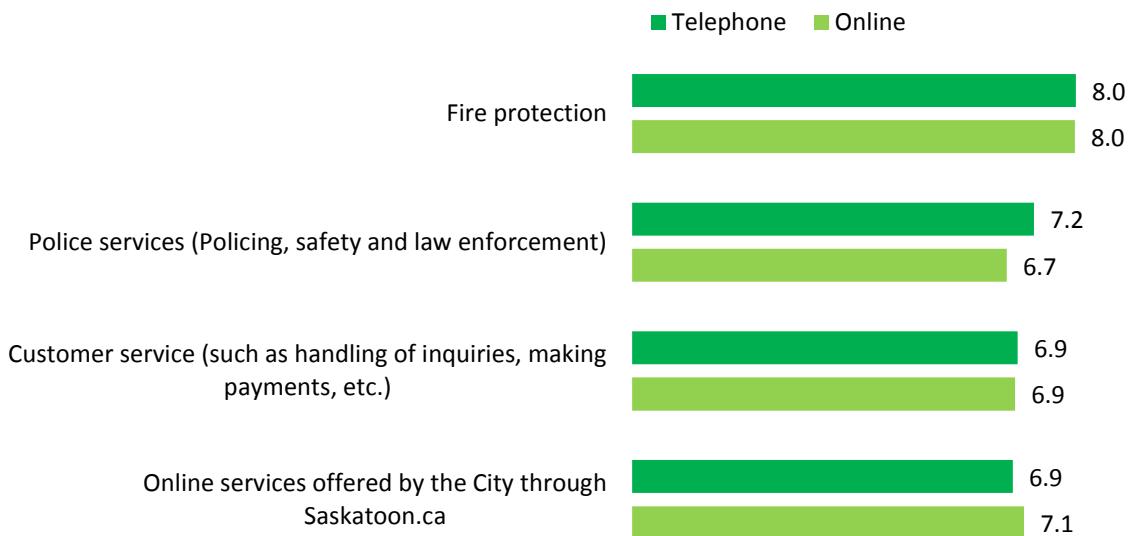
Within the Waste Management section, residents are most satisfied with garbage collection, followed closely by recycling services.



7. Please rate how well the City of Saskatoon is doing in delivering each of these services. Base: All respondents excluding "don't know," telephone: n=401 to 495, online, n=552 to 784.

Satisfaction with Other Services

Satisfaction with Other services offered by the City is high, particularly for fire protection.



7. Please rate how well the City of Saskatoon is doing in delivering each of these services. Base: All respondents excluding "don't know," telephone: n=392 to 492, online, n=625 to 782.

Tracking Satisfaction with Civic Services

Increases in satisfaction are noted in several areas among online respondents this year with most reaching all-time highs within the past four years.

Transportation & Utility Services	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Difference from 2016
Quality of drinking water	8.4	8.4	8.3	8.3	0.0	8.3	8.3	8.1	8.3	0.2
Electrical services reliability**	8.1	7.8	8.0	7.8	-0.2	7.8	7.8	7.9	8.0	0.1
Repair of watermain breaks	6.7	6.8	6.8	6.9	0.1	6.6	6.7	6.7▼	7.0▲	0.3
Removing contaminants from waste-water to make it suitable for disposal in the natural environment	7.7	7.4	6.9	6.8	-0.1	7.7	7.6	7.0▼	7.4▲	0.4
Accessibility of services for people with disabilities	-	-	6.7	6.4	-0.3	-	-	6.4	6.3	-0.1
Maintenance of major roadways and freeways in the city	5.3	5.1	5.6	5.9	0.3	4.9	4.8	5.3▼	5.8▲	0.5
Sidewalk maintenance in your neighbourhood	5.6	5.6	6.1	5.8	-0.3	5.7	5.5	5.6	5.9	0.3
Street maintenance in your neighbourhood	5.5	5.2	5.8	5.8	0.0	5.4	4.9	5.2▼	5.7▲	0.5
Public transit	6.1	5.7	5.7	5.7	0.0	5.7	5.1	5.2	5.4	0.2
Snow & ice road maintenance*	5.4	5.0	5.6	5.7	0.1	5.4	5.2	5.5▼	5.8▲	0.3
Traffic management, (traffic flow, signage etc.)	5.8	5.5	5.7	5.6	-0.1	5.4	4.9	5.3	5.5	0.2
Parking services	5.5	5.2	5.2	5.4	0.2	5.1	4.9	4.9▼	5.4▲	0.5
Maintenance of back lanes	5.1	5.2	5.6	5.4	-0.2	5.2	4.7	5.0	5.3	0.3

*Option was changed from "snow removal" in 2014. ** "Electrical services reliability" is reported for Saskatoon Light & Power customers only, telephone: n=186, online: n=295. Cells shaded in dark green signify comparatively higher numbers within the column and bright yellow signify comparatively lower numbers within the column. The shading is auto-created by MS Word and shading within one column is not directly comparable to the shading within other columns of the same table or other tables in the report. Refer to the notes section of the report for details on the shading used in this table.

Satisfaction with Community Service aspects remains steady in nearly all areas, although satisfaction has decreased for mosquito control among telephone respondents, while satisfaction has increased for outdoor swimming pools among online respondents.

Community Services	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Difference from 2016
Availability of City parks	7.7	7.9	7.8	7.8	0.0	7.3	7.8	7.6	7.7	0.1
Indoor pools/community centres/leisure facilities	7.1	7.4	7.4	7.3	-0.1	7.0	7.2	7.2	7.3	0.1
Parks (playgrounds, green spaces, pathways, tree services)	-	-	7.4	7.3	-0.1	-	-	7.3	7.2	-0.1
Maintenance of city trees and parks**	7.1	7.2	7.3	7.1	-0.2	6.9	7.2	7.2	7.1	-0.1
Paddling pools and spray parks	-	7.2	7.2	7.0	-0.2	-	7.1	7.1	7.2	0.1
Recreation programs and services	-	7.0	7.0	7.0	0.0	-	7.0	6.8	6.9	0.1
Control of dangerous and nuisance animals	6.7	7.0	7.1	6.9	-0.2	6.5	7.0	6.7	6.8	0.1
Outdoor swimming pools	6.6	6.8	6.8	6.7	-0.1	6.6	6.9	6.8▼	7.1▲	0.3
Indoor ice rinks*	6.2	6.7	6.4	6.4	0.0	6.4	6.9	6.5	6.6	0.1
Bylaw enforcement	6.2	6.2	6.4	6.2	-0.2	6.1	5.8	6.0	6.0	0.0
Funding for community based organizations	6.1	6.2	6.3	6.0	-0.3	6.0	6.2	6.1	6.3	0.2
Mosquito control	5.9	5.7	6.3▲	5.8▼	-0.5	5.7	5.8	5.8	5.7	-0.1
Funding for non-profit arts and cultural groups	5.9	6.1	6.1	5.8	-0.3	6.1	6.3	6.2	6.2	0.0
Planning for growth and development	5.9	5.6	6.0	5.8	-0.2	5.5	5.2	5.9	5.7	-0.2
Affordable housing	5.0	5.0	5.1	5.2	0.1	4.7	4.5	4.6	4.8	0.2

*Option was changed from ice rinks in 2015. **Previously separated into two categories: "Maintenance of city trees" and "Maintenance of City parks" in 2015. The historical data in the above table represents results from the latter statement. Cells shaded in dark green signify comparatively higher numbers within the column and bright yellow signify comparatively lower numbers within the column. The shading is auto-created by MS Word and shading within one column is not directly comparable to the shading within other columns of the same table or other tables in the report. Refer to the notes section of the report for details on the shading used in this table.

Satisfaction with Waste Management services remains steady this year.

Waste Management	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Difference from 2016
Garbage collection (black bin)	8.0	7.7	7.8	7.7	-0.1	7.7	7.4	7.4	7.6	0.2
Recycling (blue cart or bin)	7.3	7.3	7.6	7.4	-0.2	7.2	7.0	7.4	7.4	0.0
Landfill services	7.0	6.7	6.7	6.6	-0.1	6.9	6.7	6.7	6.9	0.2

Satisfaction with Other services provided by the City has held steady with 2016.

Other Services	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Difference from 2016
Fire protection	8.4	8.2	7.9	8.0	0.1	8.2	7.9	7.9	8.0	0.1
Police services (Policing, safety and law enforcement)	7.8	7.4	7.2	7.2	0.0	7.6	7.0	6.6	6.7	0.1
Customer service (such as handling of inquiries, making payments, etc.)	6.8	7.0	7.2	6.9	-0.3	6.5	6.7	6.8	6.9	0.1
Online services offered by the City through Saskatoon.ca	6.6	6.9	7.1	6.9	-0.2	6.5	6.7	6.8	7.1	0.3

Wording of some options changed slightly between 2015 and 2016. Please reference Wording changes between 2015 and 2016 for details.

Refer to the notes section of the report for details on the shading used in this table.

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Mapping Importance and Satisfaction

In order to demonstrate areas of strength and weakness in the City's service offerings, a quadrant analysis was conducted. The set of civic services measured is mapped based on ratings of importance (based on 2014 data) and the City's performance in delivery of these services (satisfaction – based on 2017 data).

The four quadrants are defined as follows:

Key Weaknesses (Top Left Quadrant)

Critical Weaknesses represent services believed to be of comparatively high importance, yet opinions on the performance of such services are comparatively lower. As a result, these are top priority areas in which more effort could be placed to improve performance.

Latent Weaknesses (Bottom Left Quadrant)

Latent Weaknesses represent services believed to be comparatively lower in importance and, at the same time, have comparatively lower satisfaction. These issues should be monitored as, if importance in these areas increases, efforts may be required to improve performance in the future.

Key Strengths (Top Right Quadrant)

Critical Strengths represent services with both high importance and high satisfaction ratings. Continued strong performance in these areas is essential.

Latent Strengths (Bottom Right Quadrant)

Latent Strengths are areas where the population rate a high degree of satisfaction with services, yet they see comparatively less importance in these areas. Efforts in these areas could potentially be diverted to address critical weaknesses.

Two separate maps are presented to delineate results for the telephone and online surveys.

Quadrant Analysis

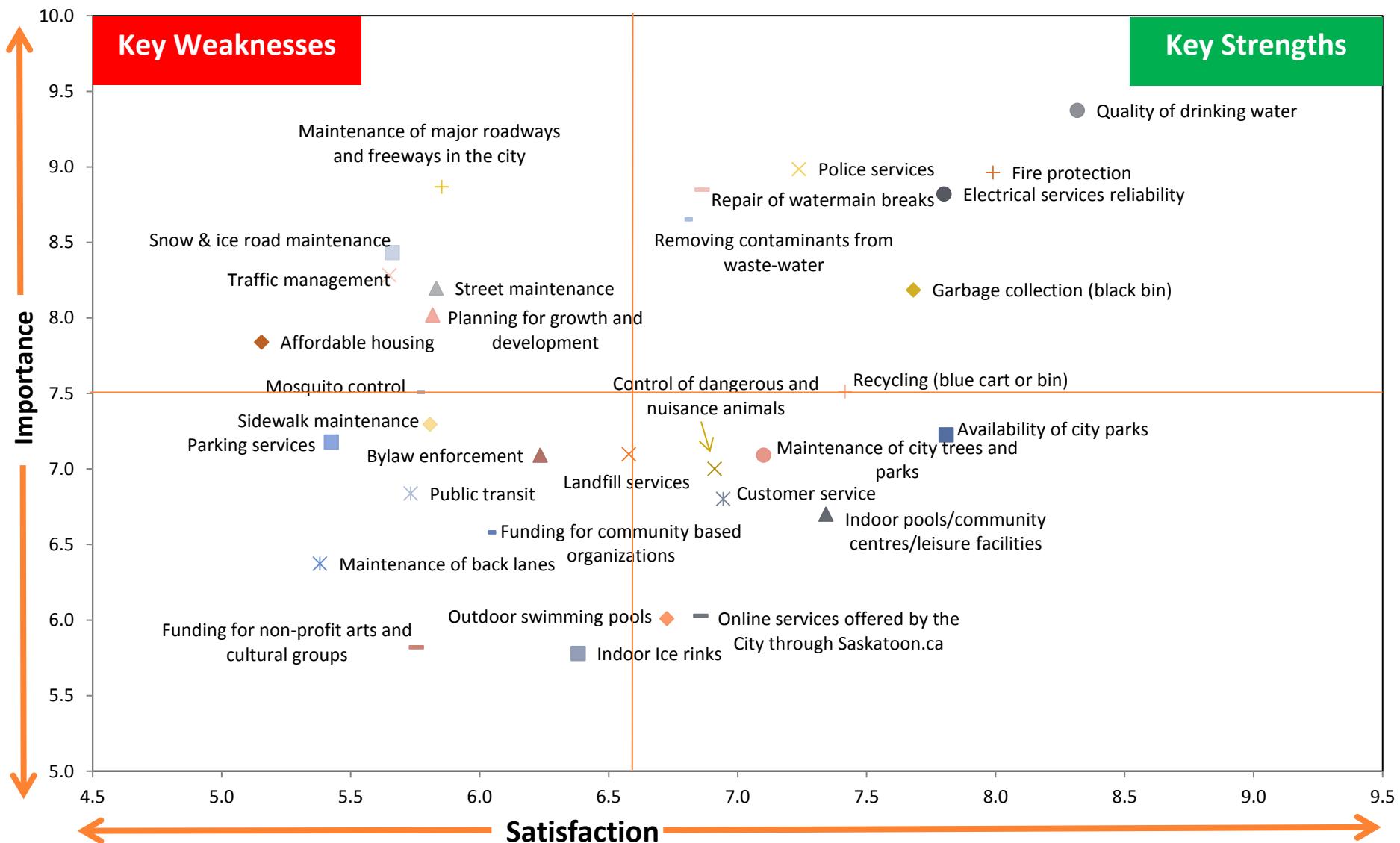
A summary of the quadrant analysis is presented below. Note that all Key Strengths and Key Weaknesses have remained the same for three years (since 2015).

Key Strengths – Rated High in Importance and Satisfaction	
Quality of drinking water	Removing contaminants from waste-water to make it suitable for disposal in the natural environment
Fire protection	Repair of watermain breaks
Electrical services reliability*	Police services (Policing, safety and law enforcement)
Garbage collection (black bin)	Recycling (blue bin or cart)

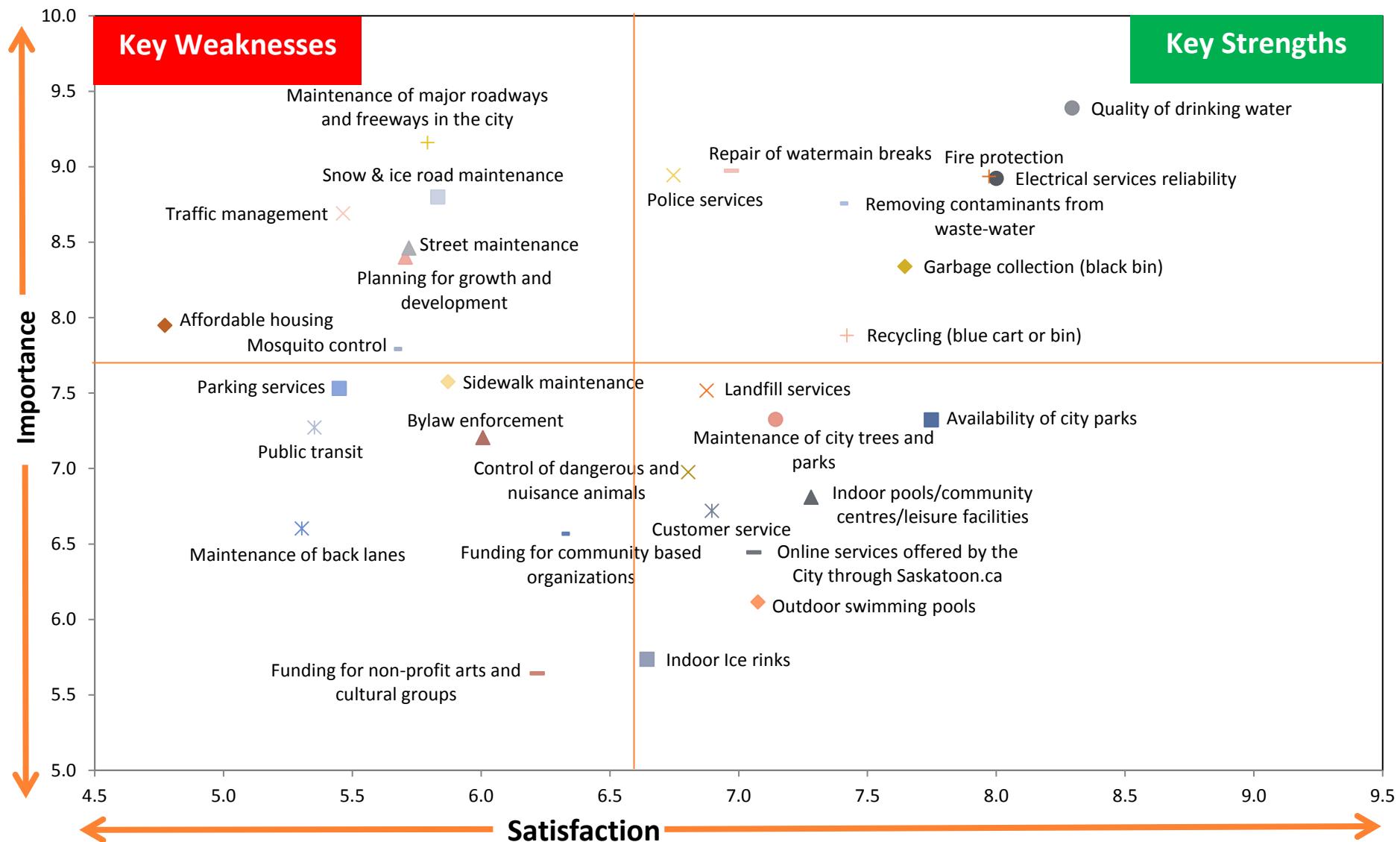
Key Weaknesses – Rated High in Importance but Low in Satisfaction	
Maintenance of major roadways and freeways in the city	Snow & ice road maintenance
Mosquito control	Planning for growth and development
Affordable housing	Traffic management, (traffic flow, signage etc.)
Street maintenance in your neighbourhood	

**"Electrical services reliability" is reported for Saskatoon Light & Power customers only, telephone: n=186, online: n=295.

Telephone Results



Online Results

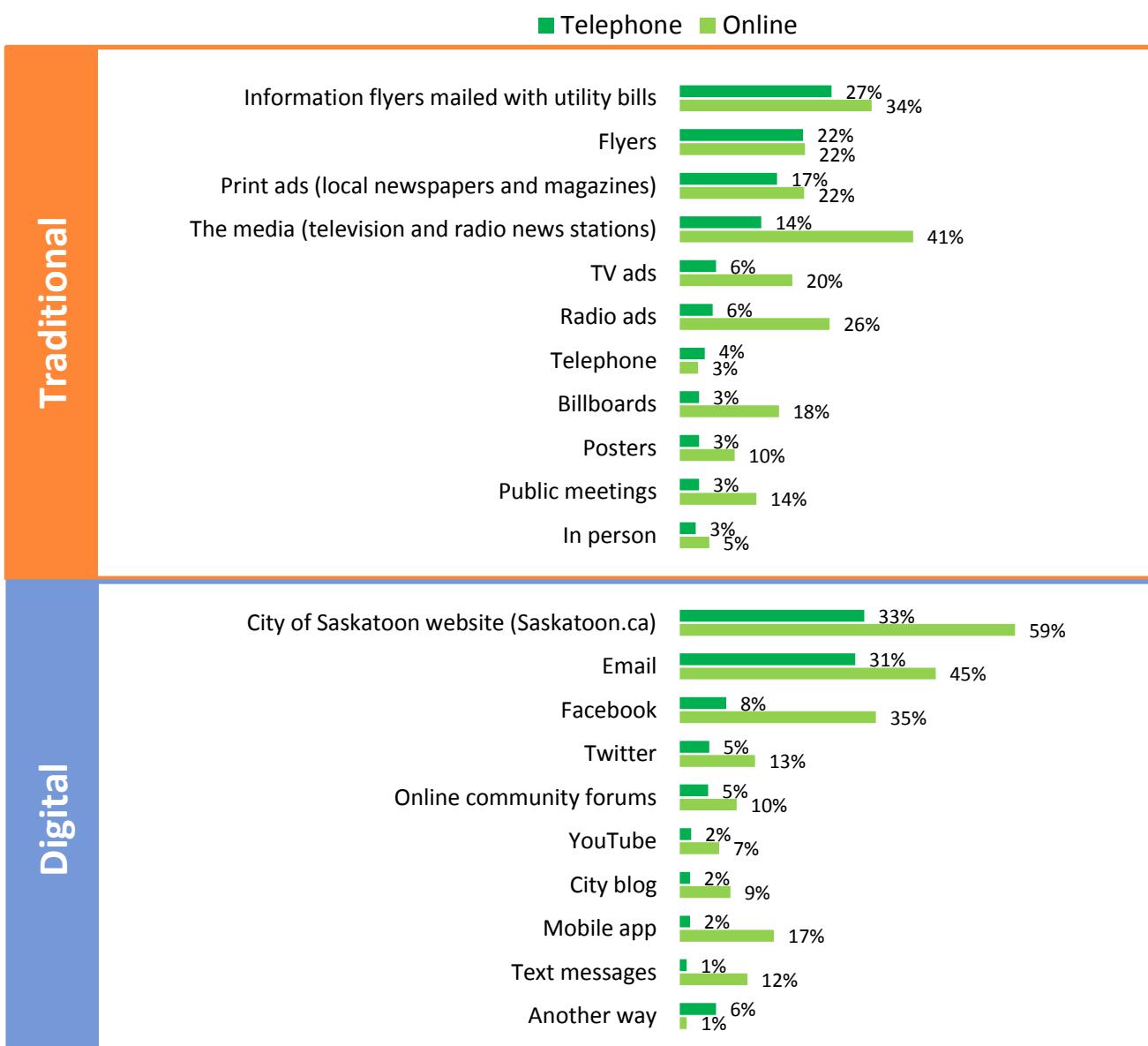


METHODS OF COMMUNICATION

Next, respondents were asked to comment on how they would most like to communicate with the City of Saskatoon and preferred methods of conducting business with the City.

Preferred Information Sources

Citizens prefer using a mix of sources to receive information about the City of Saskatoon. Most commonly, Saskatoon.ca and emails from the City are the preferred information sources for both telephone and online respondents. The media, Facebook, utility bill stuffers, flyers, print ads, radio ads, and TV ads are also common preferences.



11. Changing topics slightly, how do you prefer to receive information about all types of City of Saskatoon programs and services? Base: All respondents, telephone: n=500, online: n=805.

Tracking Preferred Information Sources

Traditional information source preferences hold relatively steady this year. More telephone respondents prefer to receive flyers while fewer prefer to receive information via radio ads.

Traditional Sources	2014 Telephone	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2014 Online	2015 Online	2016 Online	2017 Online	Difference from 2016
Information flyers mailed with utility bills	10%	3%	22%	27%	5%	30%	28%	34%	34%	0%
Flyers	25%	30%	14%▼	22%▲	8%	26%	33%	26%	22%	-4%
Print ads (local newspapers and magazines)	28%	16%	21%	17%	-4%	26%	23%	28%	22%	-6%
The media (television and radio news stations)	23%	15%	18%	14%	-4%	43%	48%	42%	41%	-1%
TV ads	20%	8%	9%	6%	-3%	26%	25%	23%	20%	-3%
Radio ads	19%	7%	11%▲	6%▼	-5%	34%	32%	27%	26%	-1%
Telephone	-	-	4%	4%	0%	-	-	4%	3%	-1%
Billboards	7%	2%	4%	3%	-1%	19%	18%	19%	18%	-1%
Posters	5%	3%	3%	3%	0%	14%	14%	13%	10%	-3%
Public meetings	6%	1%	4%	3%	-1%	13%	10%	14%	14%	0%
In person	-	-	2%	3%	1%	-	-	6%	5%	-1%

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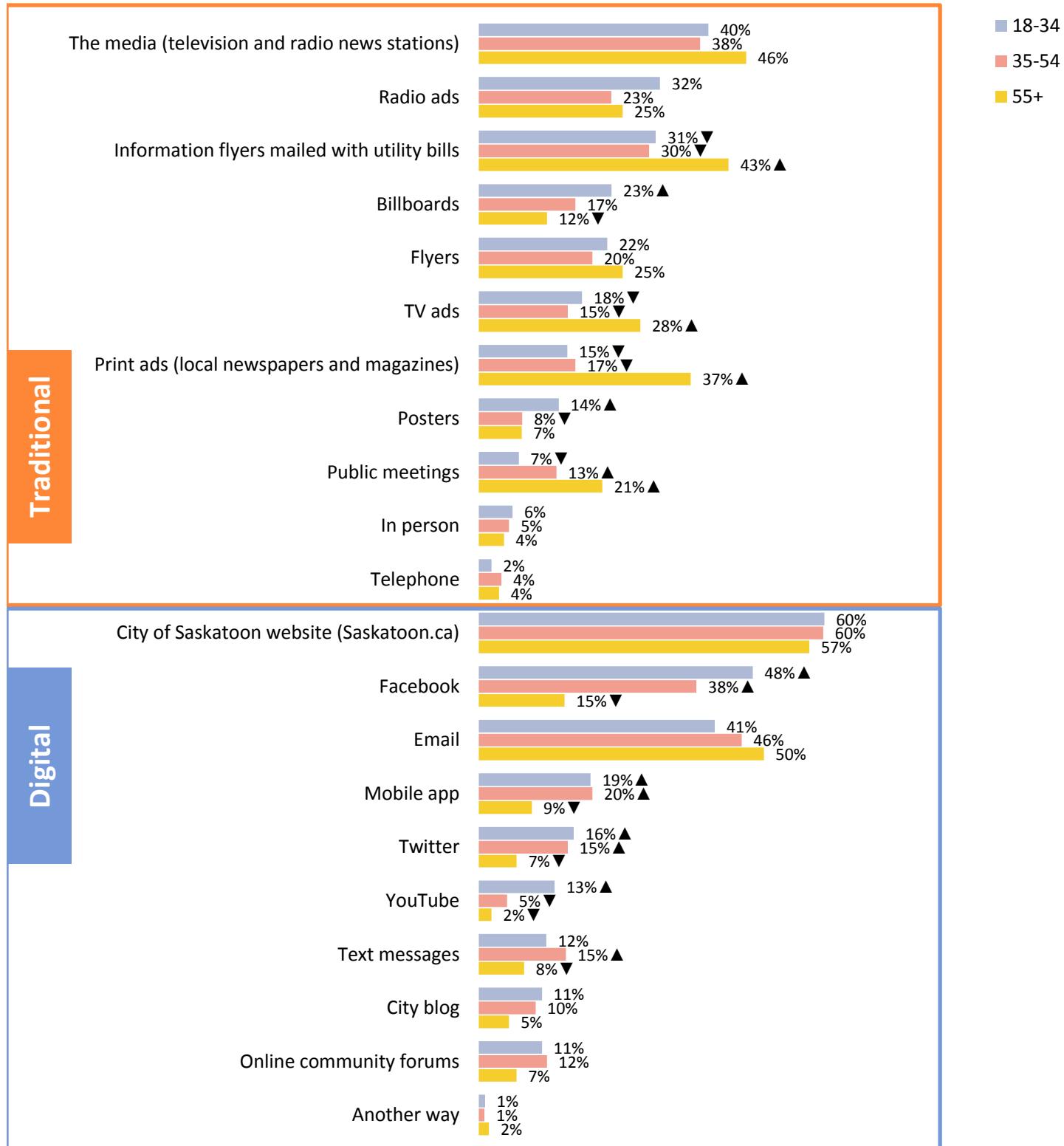
Digital information source preferences remain relatively steady with 2016.

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

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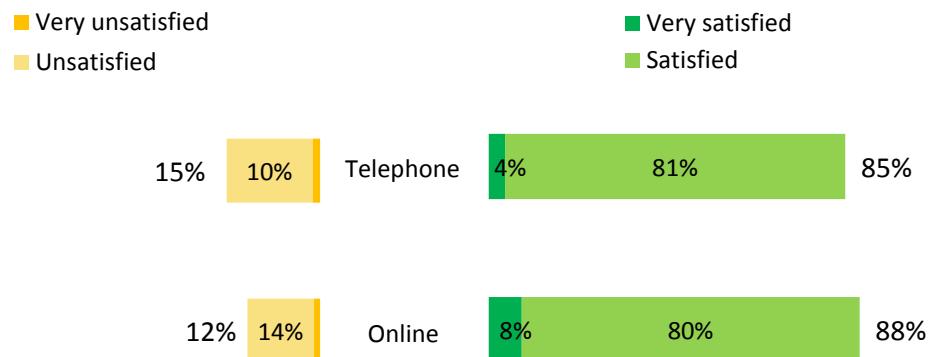
Preferred Information Sources by Age (online respondents only)

Preferred methods of receiving information from the City continue to differ by age range with younger residents more commonly naming digital sources and older residents citing traditional methods.



Satisfaction with Overall Quality of City Information and Communications

New this year, residents were asked to rate their satisfaction with the overall quality of City information and communications. Overall, satisfaction is strong among both telephone and online respondents. Less than two in ten are unsatisfied in this area.



11a. How satisfied are you with the overall quality of City information and communications? Base: All respondents, telephone: n=500, online: n=805.

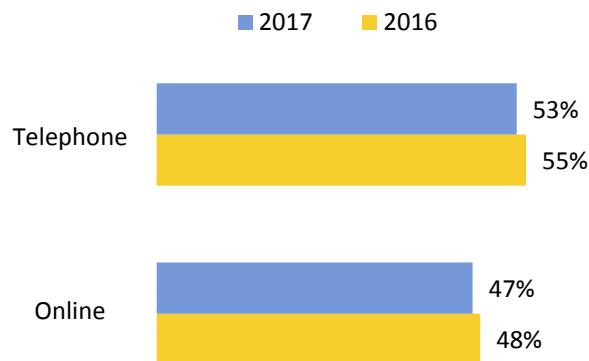
*New Question in 2017.

INTERACTIONS WITH THE CITY

Incidence of Contacting the City of Saskatoon/Participation in City Engagement Activities

Roughly one half of all residents report having had contact with or have participated in a City activity within the past 12 months, consistent with 2016.

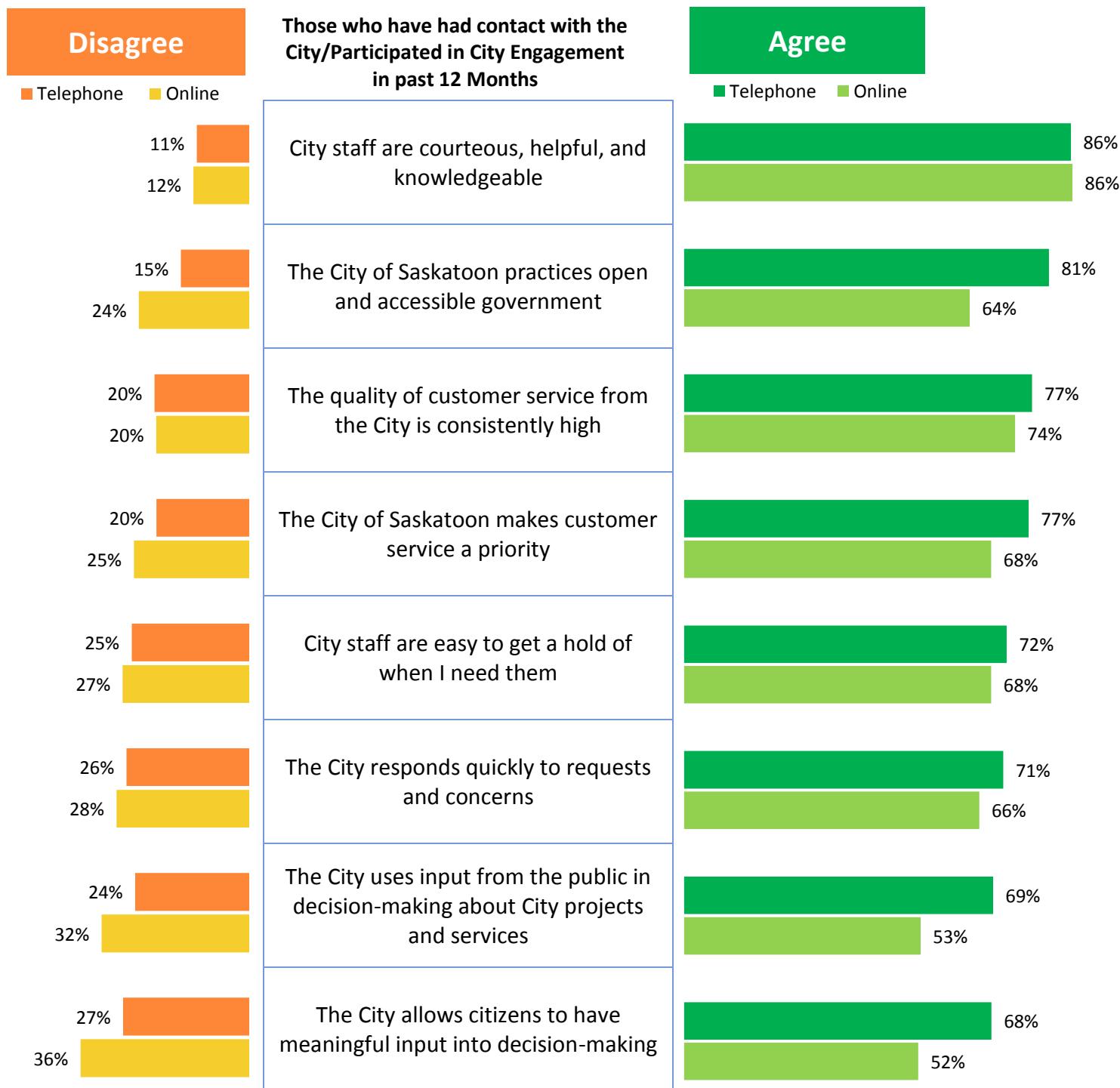
Have had contact with the City in past 12 months



13. Have you contacted or dealt with the City of Saskatoon or one of its employees or participated in any City engagement activities within the last twelve months? Base: All respondents, telephone: n=500, online: n=805.

Perceptions of City based on Personal Experience

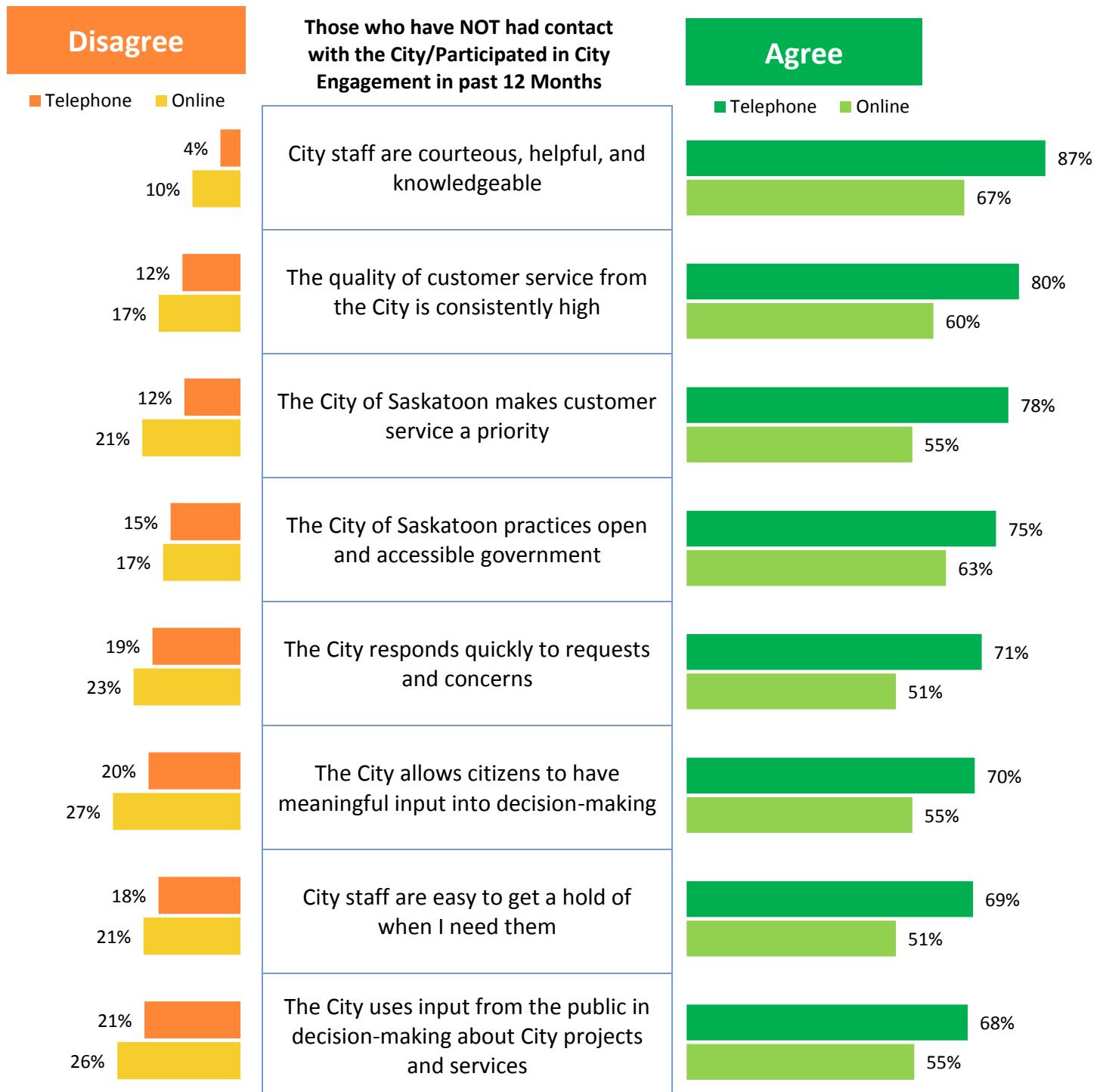
Those who have had contact with or participated in a City engagement activity within the past 12 months provide high ratings for City staff being courteous, helpful and knowledgeable, and practicing open and accessible government. Online respondents' assessments are weaker in most areas.



14. Thinking about your personal dealings with the City of Saskatoon please indicate whether you agree or disagree with each of the following statements about the City? Base: All respondents who have had contact with the City within the past 12 months, telephone: n=266, online: n=376. "Not sure" responses are not shown.

Perceptions of City based on Impressions

Those who have not had contact with the City in the past 12 months also most commonly perceive City staff as being courteous, helpful and knowledgeable, offering high quality customer service and making customer service a priority. Online respondents tend to have less favourable impressions in all areas.



14. Thinking about your general impressions and anything you may have read, seen or heard, please tell me / us whether you agree or disagree with each of the following statements about the City? Base: All respondents who have not or unsure they have had contact with the City within the past 12 months, telephone: n=234, online: n=429. "Not sure" responses are not shown.

The following tables provide a detailed breakout of responses from the graphs shown on the previous pages. Those who have interacted with the City within the past 12 months most commonly somewhat agree with each statement. Strong agreement is most common for courteous, helpful, knowledgeable staff and the quality of customer service; and lowest for statements that reference public input in decision-making. Telephone respondents provide more favourable results in all categories than online respondents.

Those who have had contact with the City/Participated in City Engagement in past 12 Months	Telephone					Online				
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure
City staff are courteous, helpful, and knowledgeable	36%	50%	9%	2%	3%	32%	55%	10%	2%	2%
The quality of customer service from the City is consistently high	26%	51%	19%	2%	2%	20%	54%	16%	4%	6%
The City of Saskatoon practices open and accessible government	21%	61%	14%	1%	4%	14%	49%	19%	5%	13%
The City of Saskatoon makes customer service a priority	20%	56%	15%	5%	3%	14%	55%	21%	4%	7%
City staff are easy to get a hold of when I need them	20%	52%	18%	8%	3%	13%	55%	23%	4%	5%
The City responds quickly to requests and concerns	23%	48%	20%	7%	3%	15%	51%	22%	6%	6%
The City uses input from the public in decision-making about City projects and services	15%	53%	18%	6%	7%	10%	43%	26%	6%	16%
The City allows citizens to have meaningful input into decision-making	12%	56%	21%	6%	5%	10%	42%	29%	7%	12%

14. Thinking about your personal dealings with the City of Saskatoon please indicate whether you agree or disagree with each of the following statements about the City? Base: All respondents who have had contact with the City within the past 12 months, telephone: n=266, online: n=376.

Shading within the above table provides comparisons across all columns within the data collection method (telephone and online), rather than for each column independently. Refer to the notes section of the report for further details on shading.

Those who have not interacted with the City within the past 12 months largely provide "somewhat agree" ratings on most statements. When combining those who strongly and somewhat agree, the overall results are similar to those found amongst those who have interacted with the City in the past 12 months (see previous page). Telephone respondents provide more favourable results than online respondents. However, it is important to note that this question had more telephone and online respondents who reported that they were "not sure".

Those who have NOT had contact with the City/ Participated in City Engagement in past 12 Months	Telephone					Online				
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure
City staff are courteous, helpful, and knowledgeable	23%	64%	3%	1%	9%	15%	52%	8%	2%	23%
The quality of customer service from the City is consistently high	21%	59%	10%	2%	7%	8%	52%	15%	2%	23%
The City of Saskatoon practices open and accessible government	17%	58%	12%	3%	10%	10%	53%	14%	3%	21%
The City of Saskatoon makes customer service a priority	18%	59%	9%	3%	10%	9%	46%	17%	3%	24%
City staff are easy to get a hold of when I need them	19%	50%	11%	6%	13%	9%	42%	17%	4%	29%
The City responds quickly to requests and concerns	15%	56%	15%	3%	10%	7%	43%	20%	3%	27%
The City uses input from the public in decision-making about City projects and services	14%	54%	16%	5%	12%	6%	49%	20%	7%	19%
The City allows citizens to have meaningful input into decision-making	15%	55%	13%	7%	11%	6%	49%	21%	6%	18%

14. Thinking about your general impressions and anything you may have read, seen or heard, please tell me / us whether you agree or disagree with each of the following statements about the City? Base: All respondents who have not or unsure they have had contact with the City within the past 12 months, telephone: n=234, online: n=429. Shading within the above table provides comparisons across all columns within the data collection method (telephone and online), rather than for each column independently. Refer to the notes section of the report for further details on shading.

Preferred Method of Conducting Business with or Contacting the City of Saskatoon

A large majority of citizens say they prefer conducting business with the City via telephone, although this method of interaction is steadily declining. Email is also a common preference for communicating with the City, although it has softened since 2016 among telephone respondents. The City website is also amongst the top preferred methods for both online and telephone respondents. Social media channels rise in interest among online respondents and decrease among telephone respondents.

Digital Sources	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2015 Online	2016 Online	2017 Online	Difference from 2016
By phone	81%	75%▲	65%▼	-10%	68%	60%	57%	-3%
Email	31%	37%▲	27%▼	-10%	43%	45%	46%	1%
In person at the counter	23%	32%▲	21%▼	-11%	29%	30%▲	23%▼	-7%
On the City website	18%	32%▲	21%▼	-11%	33%	45%	41%	-4%
Online chat	4%	13%	12%	-1%	14%	16%	17%	1%
Social media channels	2%	9%▲	4%▼	-5%	8%	7%▼	11%▲	4%
Text	-	10%▲	2%▼	-8%	-	6%	7%	1%
Other	9%	3%	2%	-1%	1%	1%	1%	0%

12. How do you prefer to conduct business with the City of Saskatoon or contact the City with a question or inquiry? Base: All respondents, telephone: n=500, online: n=805.

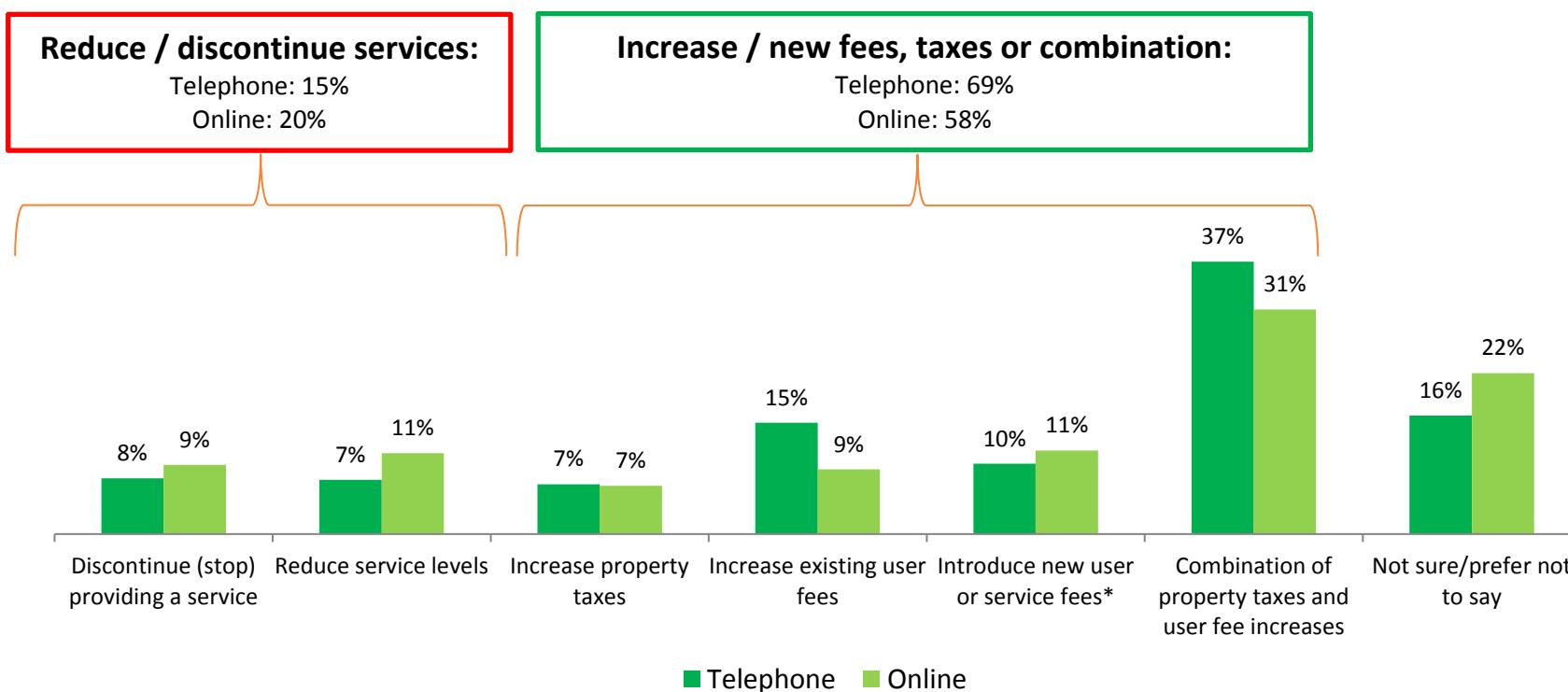
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BUDGET INPUT

Since 2015, citizens have been asked questions regarding balancing of the City's budget and preferred priorities for spending in the future.

Budget Balancing

When asked which of the following methods the City could use to balance its budget, most residents prefer a combination of property tax and user fee increases over other methods. However, a sizable proportion is not sure.



8. If the city needs to make choices in terms of how it balances its operating budget, please identify the method for balancing the budget that you most prefer. (Select only one response) Base: All respondents, telephone: n=500, online: n=805.

Budget Balancing – Trended

The proportion of residents supportive of new or increased fees, taxes, or a combination of both as their preferred method for balancing the budget has increased in 2017 among online respondents.

Balancing Method	2015 Telephone	2016 Telephone	2017 Telephone	Difference from 2016	2015 Online	2016 Online	2017 Online	Difference from 2016
Reduce / discontinue services	19%	17%	15%	-2%	20%	18%	20%	2%
Increase / new fees, taxes or combination	62%	67%	69%	2%	48%	51%▼	58%▲	7%
Not sure / prefer not to say	19%	16%	16%	0%	33%	31%▲	22%▼	-9%

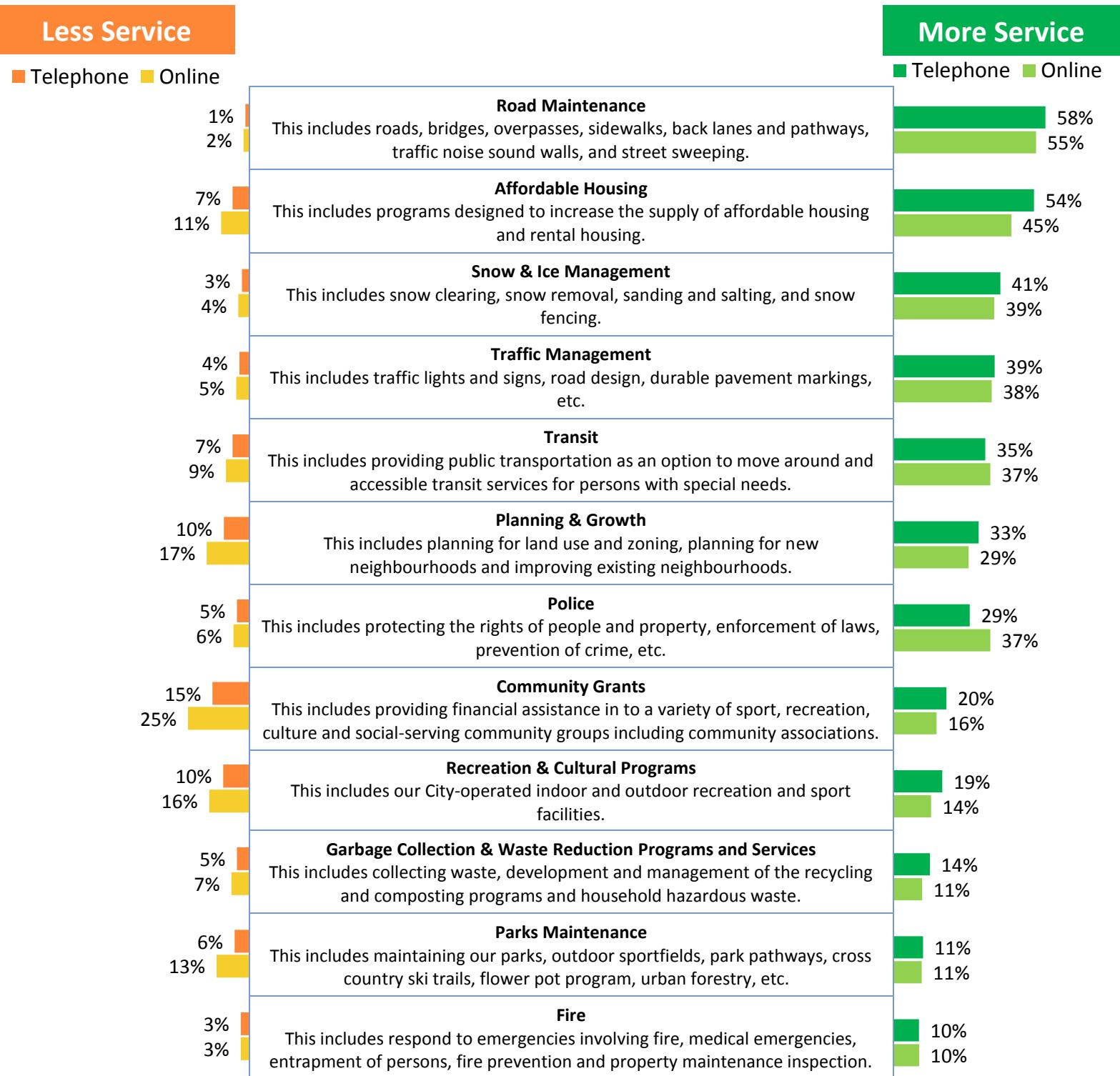
**"Introduce new user or service fee" option added in 2016 and therefore 2015 results are not directly comparable.

* Wording changed slightly between 2015 and 2016. Previous wording: "Which of the following methods for balancing the City of Saskatoon budget do you prefer most?"

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Preferences on Level of Civic Services

Citizens were next asked if they believe the City should provide more, less, or the same amount of service in several different civic areas. A majority would like to see additional services provided for road maintenance and affordable housing (telephone only). A smaller proportion would also like to see more services provided for snow & ice management, traffic management, transit, growth planning, and policing.



9. Next we have a brief list of service categories. For each category, please indicate if you would like the City to provide more service, less service or about the same. Please keep in mind that taxes or user fees may increase if the City were to provide more service in one or more categories. Base: All respondents, telephone: n=500, online: n=805. "Don't know" and "same" responses are shown in the table below.

The following table provides detailed responses from the previous page.

	Telephone Respondents				Online Respondents			
	More Service	Less Service	Same	Don't know	More Service	Less Service	Same	Don't know
Road Maintenance	58%	1%	39%	1%	55%	2%	41%	2%
Affordable Housing	54%	7%	33%	6%	45%	11%	32%	12%
Snow & Ice Management	41%	3%	55%	1%	39%	4%	55%	2%
Traffic Management	39%	4%	55%	2%	38%	5%	55%	3%
Transit	35%	7%	51%	8%	37%	9%	44%	10%
Planning & Growth	33%	10%	53%	4%	29%	17%	47%	7%
Police	29%	5%	64%	2%	37%	6%	53%	3%
Community Grants	20%	15%	57%	8%	16%	25%	48%	11%
Recreation & Cultural Programs	19%	10%	67%	4%	14%	16%	64%	5%
Garbage Collection & Waste Reduction programs and services	14%	5%	80%	2%	11%	7%	80%	2%
Parks Maintenance	11%	6%	81%	2%	11%	13%	73%	3%
Fire	10%	3%	84%	3%	10%	3%	80%	7%

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Preferences on Level of Civic Services – More Service Trended

The proportion of respondents wanting to see more services has decreased for most categories compared to 2016, especially road maintenance. This correlates with fewer citizens who name roads and sidewalks as the most important issue facing the city this year (see page 13) and fewer citing infrastructure & traffic as a way to improve the quality of life in Saskatoon (see page 10).

More Service	2016 Telephone	2017 Telephone	Difference from 2016	2016 Online	2017 Online	Difference from 2016
Road Maintenance	70%▲	58%▼	-12%	70%▲	55%▼	-15%
Affordable Housing	54%	54%	0%	53%▲	45%▼	-8%
Snow & Ice Management	46%	41%	-5%	49%▲	39%▼	-10%
Traffic Management	44%	39%	-5%	46%▲	38%▼	-8%
Transit	43%	35%	-8%	45%▲	37%▼	-8%
Planning & Growth	38%	33%	-5%	35%▲	29%▼	-6%
Police	33%	29%	-4%	41%	37%	-4%
Community Grants	20%	20%	0%	21%▲	16%▼	-5%
Recreation & Cultural Programs	23%	19%	-4%	22%▲	14%▼	-8%
Garbage Collection & Waste Reduction programs and services	14%	14%	0%	17%▲	11%▼	-6%
Parks Maintenance	13%	11%	-2%	13%	11%	-2%
Fire	13%	10%	-3%	15%▲	10%▼	-5%

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Preferences on Level of Civic Services – Less Service Trended

Few changes are noted in terms of the proportion of residents who would like to see less services in each of these areas. In select areas, there is a greater proportion of online respondents who would like to see less services offered (transit, planning & growth, recreation & cultural programs and parks maintenance).

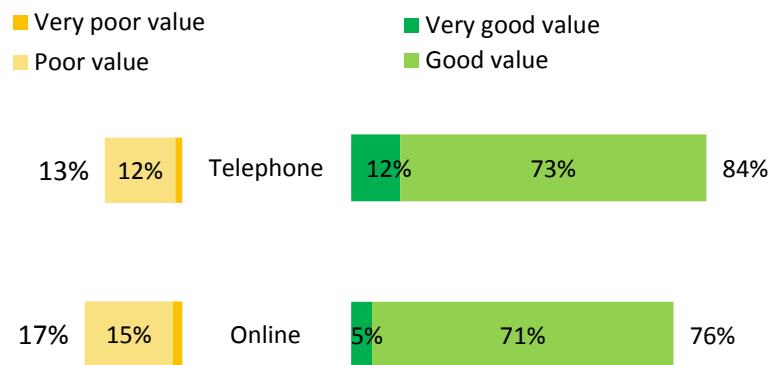
Less Service	2016 Telephone	2017 Telephone	Difference from 2016	2016 Online	2017 Online	Difference from 2016
Road Maintenance	2%	1%	-1%	2%	2%	0%
Affordable Housing	8%	7%	-1%	9%	11%	2%
Snow & Ice Management	2%	3%	1%	2%	4%	2%
Traffic Management	3%	4%	1%	4%	5%	1%
Transit	5%	7%	2%	6%▼	9%▲	3%
Planning & Growth	8%	10%	2%	11%▼	17%▲	6%
Police	7%	5%	-2%	8%	6%	-2%
Community Grants	13%	15%	2%	21%	25%	4%
Recreation & Cultural Programs	11%	10%	-1%	9%▼	16%▲	7%
Garbage Collection & Waste Reduction programs and services	5%	5%	0%	4%	7%	3%
Parks Maintenance	5%	6%	1%	7%▼	13%▲	6%
Fire	2%	3%	1%	3%	3%	0%

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PERCEIVED VALUE

Perceived Value of City Programs and Services

The majority of residents believe they receive good value for what they pay in property taxes. Less than two in ten respondents feel the value of civic services they receive is poor.

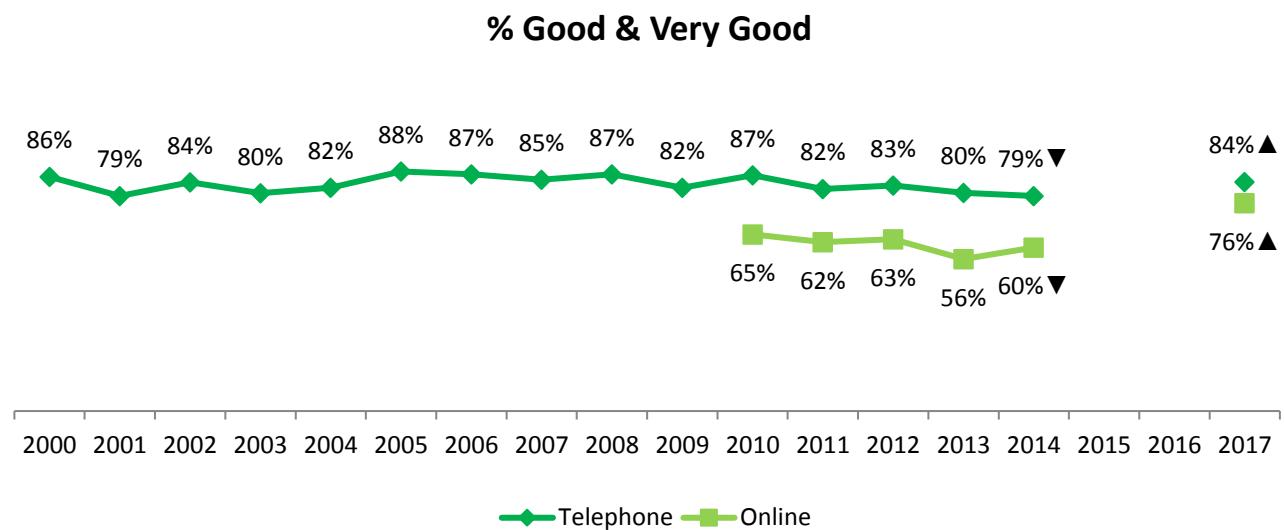


7a. The City provides more than 70 programs and services to residents. The City pays for these services by collecting money through five different sources. Less than half of the money comes from property taxes, with the rest coming from other sources. Thinking about the programs and services you received from the City of Saskatoon, would you say that, overall you get...

Base: All respondents, telephone: n=500, online: n=805. "Unsure/don't know" responses are not shown.

Trended Perceived Value of City Programs and Services

Perceptions of the value of civic services have increased since 2014, when this question was last asked, especially among online respondents. Roughly eight in ten believe the programs and services offered by the City are of good or very good value.

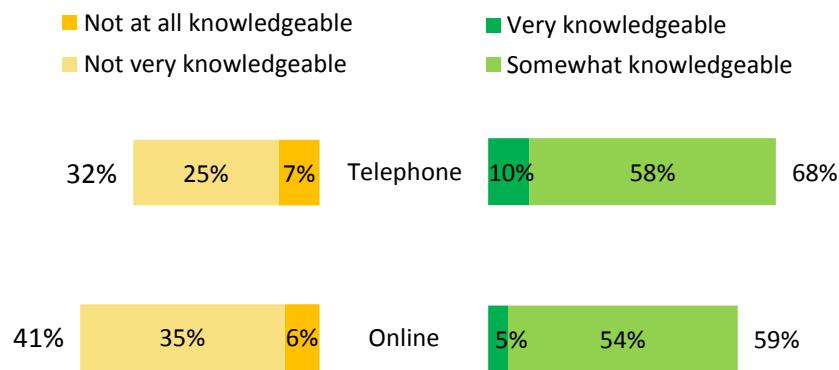


*Wording changed slightly between 2014 and 2017. Previous wording: About 52% of your property taxes go toward paying for civic services. The remaining 48% goes toward the school boards and library. Thinking now only about the programs and services you received from the City of Saskatoon, would you say that, overall you get...

*Question removed from survey in 2015 and 2016, no trending available for these years.

Knowledge of Tax Dollar Spending

Claimed knowledge levels of how City tax dollars are spent is moderate, with sizable proportions saying they are either somewhat knowledgeable or not very knowledgeable. Telephone respondents are more likely to claim that they have higher knowledge levels than online respondents.

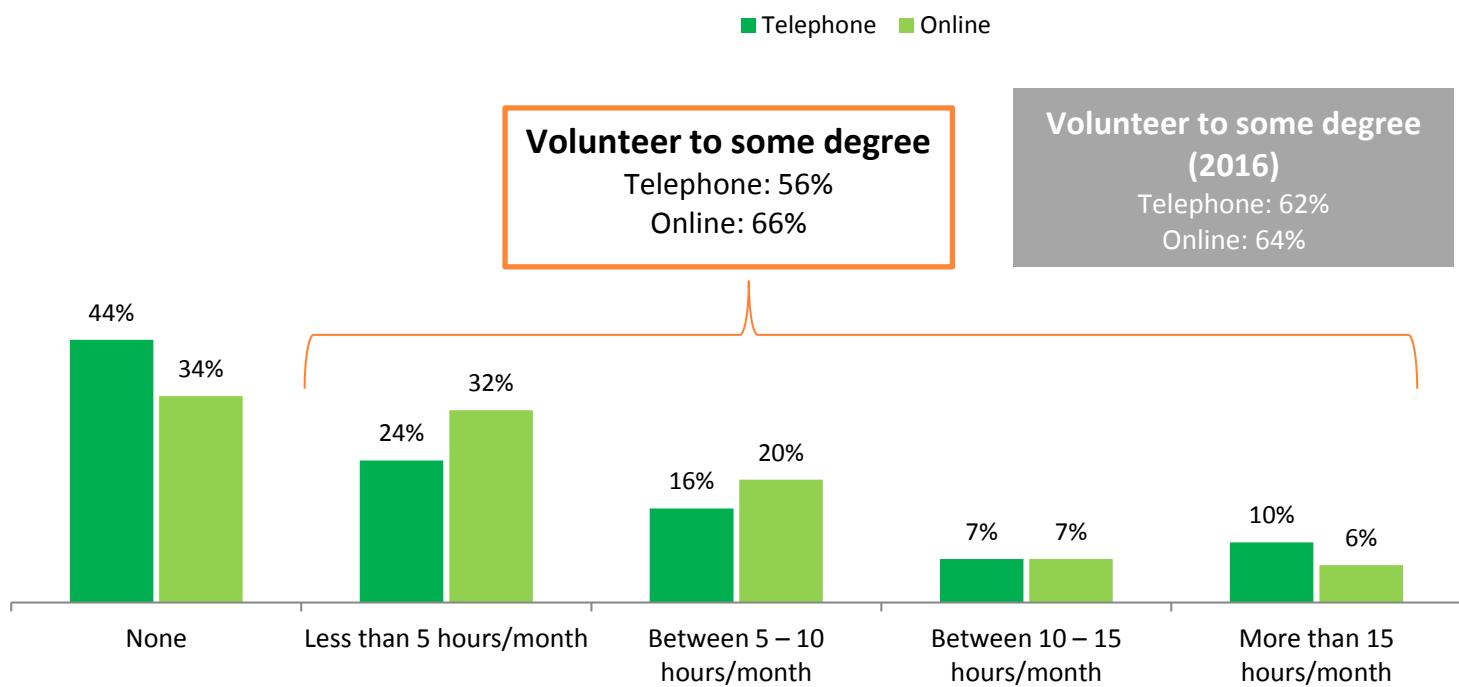


7b. Thinking about how the City of Saskatoon government is run, and what services it provides, would you say you are very, somewhat, not very or not at all knowledgeable about how city tax dollars are spent? Base: All respondents, telephone: n=500, online: n=803. *New question added in 2017.

CITIZEN VOLUNTEERISM

Roughly six in ten Saskatoon residents claim to volunteer to some degree each month. These findings are consistent with 2016 (the first year this question was asked).

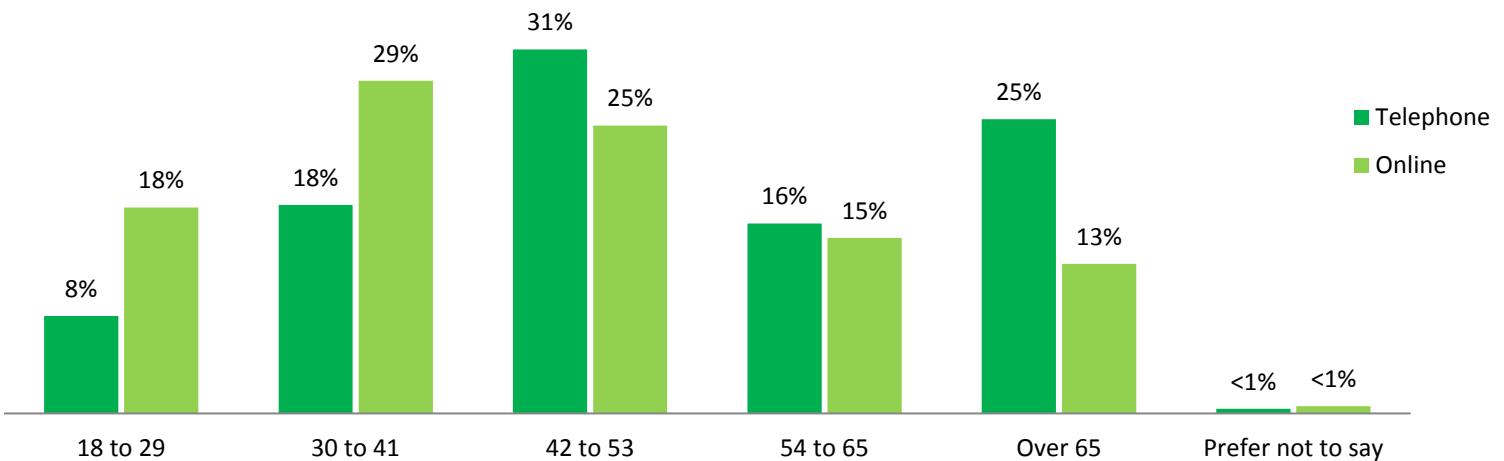
19. On average, how many hours a month would you say that you volunteer? Base: All respondents, telephone:



n=500, online: n=805.

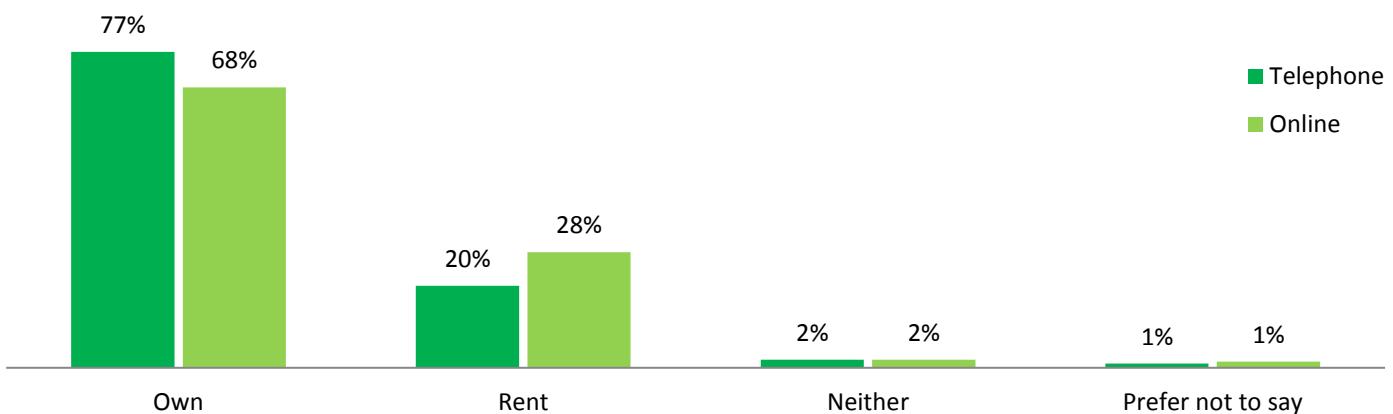
DEMOGRAPHICS

Age Range



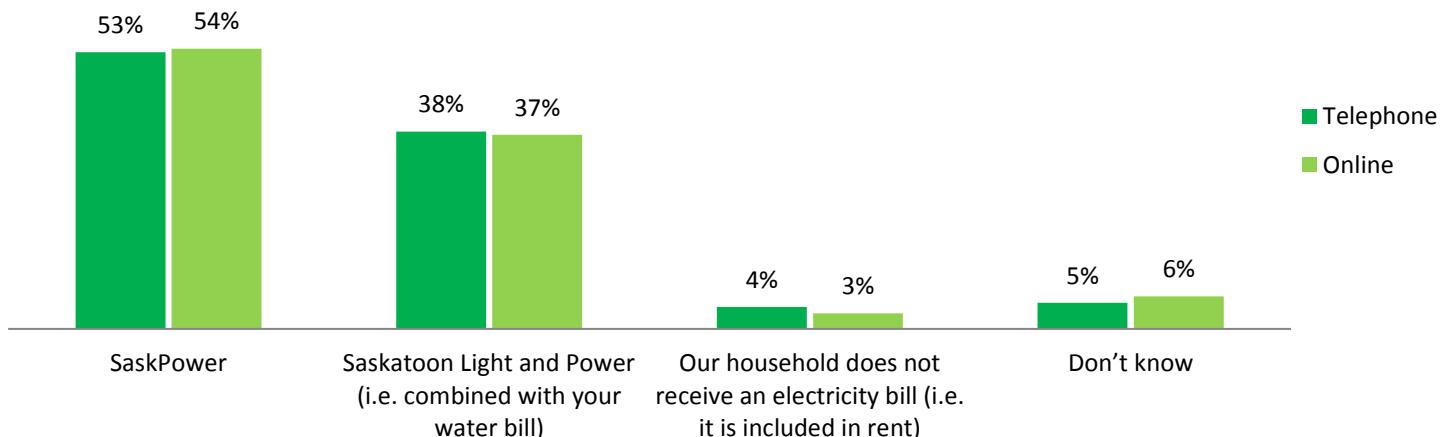
15. In what year were you born? Base: All respondents, telephone: n=500, online: n=805.

Type of Accommodations



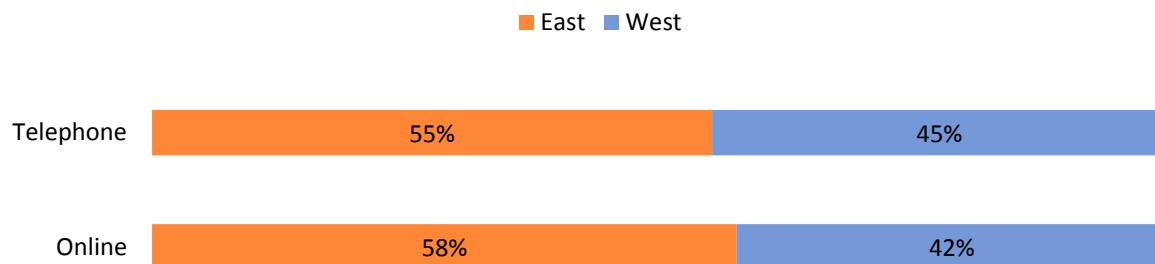
16. Do you rent or own your accommodations? Base: All respondents, telephone: n=500, online: n=805.

Electricity Provider



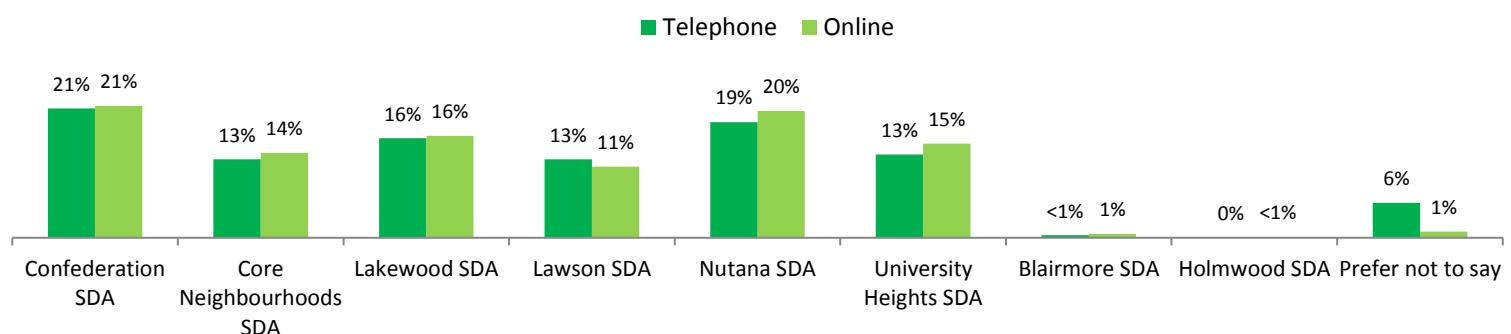
18. Who is your household's electricity provider – that is, who do you receive a bill for electricity services from? Base: All respondents, telephone: n=500, online: n=805.

Location of Residence



17a. Do you live on the east side or the west side of the river? Base: All respondents, telephone: n=500, online: n=805.

Suburban District Area (SDA)



17b. Into which of the following neighbourhoods in Saskatoon do you live? Base: All respondents, telephone: n=500, online: n=805.

Suburban District Areas

Blairmore SDA

Blairmore Development Area
Blairmore S.C.
Kensington
Elk Point

Confederation SDA

Parkridge
Fairhaven
Confederation Park
Pacific Heights
Dundonald
Hampton Village
Massey Place
Montgomery Place
Westview
Mount Royal
Holiday Park
Meadowgreen
Confederation S.C.
Hudson Bay Park
West Industrial
Airport Business Area

Core Neighbourhoods SDA

Nutana
Caswell Hill
City Park
Varsity View
Westmount
Central Business District
Pleasant Hill
King George
Riversdale

Lakewood SDA

Wildwood

Lakeview
Briarwood
College Park
Lakeridge
College Park East
Lakewood S.C.
Rosewood
S.E. Development Area 901

Holmwood SDA

U of S Lands - East Management Area 718
Holmwood Development Area 904
Brighton

Lawson SDA

Lawson Heights S.C.
Silverwood Heights
Lawson Heights
Mayfair
River Heights
North Park
Kelsey Woodlawn
Richmond Heights

Nutana SDA

The Willows
Nutana S.C.
Buena Vista
Eastview
Nutana Park
Stonebridge
Holliston
Avalon
Haultain
Queen Elizabeth
Greystone Heights
Adelaide Churchill

Exhibition
Brevoort Park
Grosvenor Park

University Heights SDA

Forest Grove
Silverspring
Sutherland
Erindale
Arbor Creek
Willowgrove
University Heights S.C.
U of S Management Area
University Heights Development Area
Evergreen
U of S Lands – South Management Area
S.E. Development Area 901
Aspen Ridge

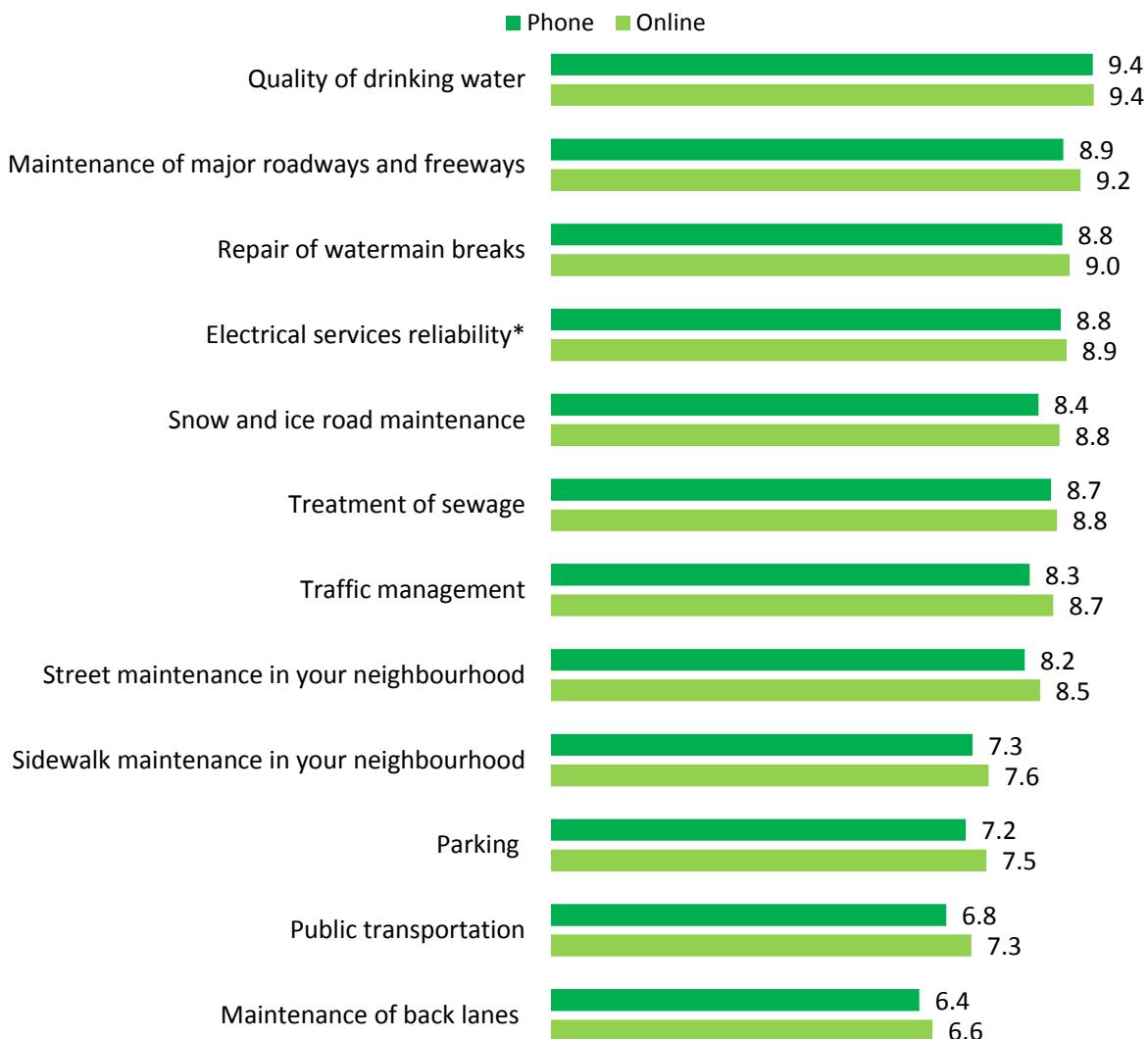
APPENDIX

The appendix provides details from the importance questions asked in 2014 which have been used for the quadrant analysis in this year's report.

Importance of Transportation & Utility Services

Most transportation and utility services were deemed to be very important in the 2014 study. Sidewalk maintenance, parking, public transportation, and back lane maintenance were perceived as comparatively less important.

2014 Rating of Importance



4. Please rate how important each of the following services are to you personally. Base: All respondents excluding "don't know," telephone: n=478 to 500, online, n=788 to 800. 2014 results.

* Results filtered to show only Saskatoon Light & Power customers.

Importance of Community Services

In 2014, planning for growth and development was deemed to be the most important community service while leisure services were comparatively less important to citizens.

2014 Rating of Importance

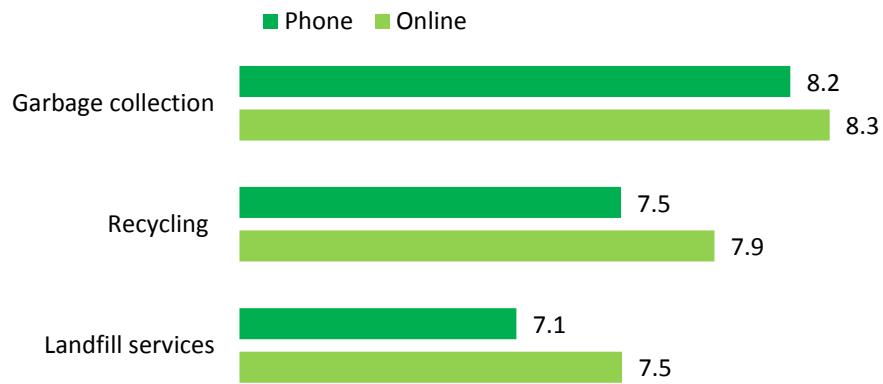


4. Please rate how important each of the following services are to you personally. Base: All respondents excluding "don't know," telephone: n=478 to 500, online, n=788 to 800. 2014 results.

Importance of Waste Management

In 2014, garbage collection was seen to be more important than recycling and landfill services.

2014 Rating of Importance

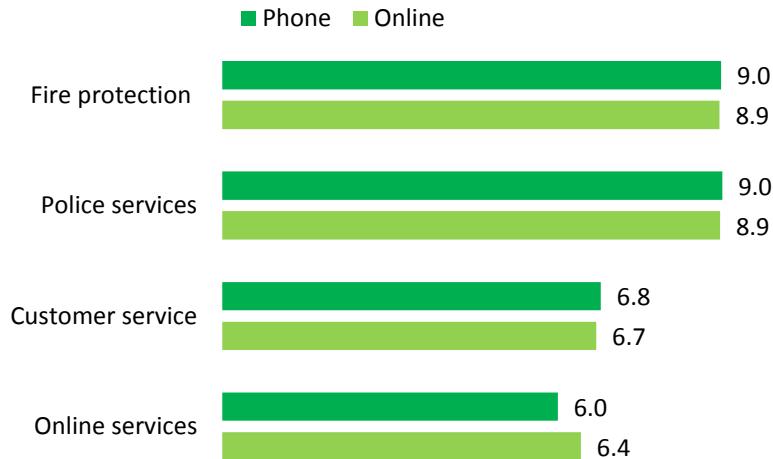


4. Please rate how important each of the following services are to you personally. Base: All respondents excluding "don't know," telephone: n=478 to 500, online, n=788 to 800. 2014 results.

Importance of Other Services

Among the remaining civic services presented to citizens, fire protection and police services were perceived to be the most important in 2014.

2014 Rating of Importance



4. Please rate how important each of the following services are to you personally. Base: All respondents excluding "don't know," telephone: n=478 to 500, online, n=788 to 800. 2014 results.

Tracking Importance of Services

In 2014, the perceived importance of specific civic services remained consistent except for funding for community-based organizations, for which a notable decline in importance was observed. However, this may have been due in part to a change in the wording between 2013 and 2014.

Transportation & Utility Services	2011 Telephone	2012 Telephone	2013 Telephone	2014 Telephone	Difference from 2013	2011 Online	2012 Online	2013 Online	2014 Online	Difference from 2013
Maintenance of major roadways and freeways	8.9	9.0	9.0	8.9	-0.1	9.1	9.1	9.2	9.2	0.0
Snow and ice road maintenance*	8.3	8.3	8.5	8.4	-0.1	8.8	8.6	8.8	8.8	0.0
Traffic management	8.1	8.4	8.4	8.3	-0.1	8.7	8.8	8.8	8.7	-0.1
Street maintenance in your neighbourhood	8.2	8.3	8.3	8.2	-0.1	8.5	8.5	8.5	8.5	0.0
Sidewalk maintenance in your neighbourhood	7.1	7.0	7.1	7.3	0.2	7.7	7.6	7.6	7.6	0.0
Parking	-	-	7.0	7.2	0.2	-	-	7.5	7.5	0.0
Public transportation	7.0	7.1	7.0	6.8	-0.2	7.4	7.3	7.5	7.3	-0.2
Maintenance of back lanes	6.4	6.1	6.1	6.4	0.3	6.5	6.4	6.6	6.6	0.0
Repair of watermain breaks	8.7	8.9	8.8	8.8	0.0	8.9	9.0	9.1	9.0	-0.1
Quality of drinking water	9.2	9.4	9.4	9.4	0.0	9.4	9.5	9.5	9.4	-0.1
Treatment of sewage	8.5	8.7	8.7	8.7	0.0	8.7	8.8	8.9	8.8	-0.1
Electrical services reliability**	8.4	8.6	8.6	8.8	0.2	8.8	8.8	8.9	8.9	0.0

* Option was changed from "snow removal" in 2014.

** Results filtered to show only Saskatoon Light & Power customers.

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Community Services	2011 Telephone	2012 Telephone	2013 Telephone	2014 Telephone	Difference from 2013	2011 Online	2012 Online	2013 Online	2014 Online	Difference from 2013
Planning for growth and development*	8.0	8.2	8.4	8.0	-0.4	8.5	8.5	8.6	8.4	-0.2
Affordable housing**	-	-	-	7.8	-	-	-	-	7.9	-
Indoor pools / community centres	6.8	7.0	6.9	6.7	-0.2	7.0	6.9	7.0	6.8	-0.2
Outdoor swimming pools	6.2	6.2	6.2	6.0	-0.2	6.1	6.2	6.4	6.1	-0.3
Ice rinks	5.9	6.0	5.9	5.8	-0.1	5.8	5.7	5.8	5.7	-0.1
Golf courses	4.7	4.6	4.7	4.6	-0.1	4.6	4.5	4.6	4.5	-0.1
Mosquito control	7.5	7.4	7.5	7.5	0.0	7.9	7.8	7.9	7.8	-0.1
Maintenance of City parks	7.5	7.6	7.5	7.6	0.1	7.8	7.7	7.8	7.7	-0.1
Maintenance of City trees	7.0	7.0	6.9	7.1	0.2	7.4	7.3	7.4	7.3	-0.1
Accessibility of City parks	7.2	7.3	7.2	7.2	0.0	7.6	7.4	7.4	7.3	-0.1
Funding for community-based organizations***	7.7	7.7	7.5	6.6	-0.9	7.5	7.4	7.4	6.6	-0.8
Funding for arts and cultural groups	5.9	5.9	5.9	5.8	-0.1	6.0	5.9	5.8	5.6	-0.2
Bylaw enforcement	7.0	6.9	7.0	7.1	0.1	7.3	7.2	7.3	7.2	-0.1
Control of dangerous and nuisance animals	6.9	7.0	6.9	7.0	0.1	7.1	7.0	7.0	7.0	0.0

* Option was changed from "planning and development of the city" in 2014

** Option was added in 2014.

*** Option was changed from "funding for community service organizations that help people in need."

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Waste Management	2011 Telephone	2012 Telephone	2013 Telephone	2014 Telephone	Difference from 2013	2011 Online	2012 Online	2013 Online	2014 Online	Difference from 2013
Garbage Collection	-	8.4	8.2	8.2	0.0	-	8.3	8.5	8.3	-0.2
Recycling*	7.6	7.6	7.6	7.5	-0.1	7.7	7.6	7.8	7.9	0.1
Landfill services	7.2	7.2	7.2	7.1	-0.1	7.5	7.5	7.6	7.5	-0.1

* Option was changed from "recycling initiatives" in 2014

Other	2011 Telephone	2012 Telephone	2013 Telephone	2014 Telephone	Difference from 2013	2011 Online	2012 Online	2013 Online	2014 Online	Difference from 2013
Fire protection	8.9	9.1	9.1	9.0	-0.1	9.1	9.0	9.1	8.9	-0.2
Police services	8.8	9.0	9.0	9.0	0.0	9.1	9.0	9.0	8.9	-0.1
Customer service	6.7	6.8	6.7	6.8	0.1	6.7	6.8	6.8	6.7	-0.1
Online services	-	-	5.8	6.0	0.2	-	-	6.4	6.4	0.0

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