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CITY OF Burlington

FOUNDATION RESEARCH GROUP INC.

2011 Community Survey

MAY 11, 2011



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Introduction & Objectives

The following presents the findings from the 2011 Community Survey conducted by Foundation Research group on behalf of the City of Burlington. This survey is conducted as part of the City's on-going efforts to improve municipal services. This is the sixth wave of the Burlington Quality of Services Survey. The survey was first conducted in 1998 and then repeated in 2001, 2003, 2006, and 2008. In the 2011 wave, Foundation Research Group took over the provision of research services for the study and made some adjustments to the survey instrument in consultation with the City of Burlington.

In 2011, new questions have been added surrounding the City's existing and potential spending priority areas as well as preferred communication methods between the City and residences and feedback methods. Where appropriate, and available, tracking data from previous waves has been shown.

Methodology

The survey is based on a random and representative sample of 752 Burlington residents aged 18 or older. The survey was conducted via telephone between April 4 - 11, 2011. In order to compare results at the ward level, over-sampling was employed to ensure a total of 125 interviews were obtained within each of the 6 city wards. The overall data has been weighted by ward to be representative of the City and is accurate to within +/-3.6%, 19 times out of 20. The margin of error will be higher at the ward level and among other sub-groups of the population.

Executive Summary

Overall, residents remain pleased with life in Burlington and despite some changes from 2008, results overall remain positive. A majority of residence rate Burlington highly as a place to live and are satisfied with services overall. Residents continue to place high importance on most city services, with snow clearing from roads and road maintenance continuing to top the list. However, more importance is being placed on all services, particularly, parking, community centres and arenas. Overall, usage has dramatically increased for most services since 2008. Community centres, arenas, and regular and special transit have all seen an increase in usage since 2008. New to the survey this year was

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requiring all respondents to answer the satisfaction question, even if they have not used the service. FRG continued to report satisfaction amongst users for historical tracking purposes. Satisfaction with services varies widely. Satisfaction with clearing of snow from city roads, clearing of snow from city sidewalks and regular transit increased since 2008. Satisfaction with other services has remained stable.

FRG has assessed importance in two ways: Derived and Stated Importance. Depending on how you determine importance, the gap analysis will reveal different sets of priorities for 2011. Assuming that ***Derived Importance*** *is a more reliable measure of Importance,* ***Special Transit, Regular Transit and Clearing Snow from City Sidewalks*** *are the three main priorities areas for improvement for 2011. Using* ***Stated Importance*** *as the more reliable measure, however, reveals that* ***Maintenance and Condition of City Roads, Clearing Snow for City Sidewalks, and Availability of Public Parking*** *emerge as the three main priorities areas for improvement for 2011.*

FRG would advocate using derived importance as the more reliable measure of importance and would focus on improving Special Transit, Regular Transit and Clearing Snow from city Sidewalks.

In terms of satisfaction amongst users and non-users, the purpose of asking non-users the satisfaction questions was to determine if there were any barriers preventing them from using services, such as hours of operation, location, bus routes, fees, or features. There were only three services or programs that had sufficient response for analysis.

Users of Regular Transit were most likely to cite long wait times at bus stops / late buses as a prime reason for service dissatisfaction (37%) whereas those residents who do not use the service were most likely to cite a lack of buses / infrequent services, or a lack or routes / routes don't reach where needed (18% each).

The majority of On-road Bike Lane users cite a lack of bike lanes as their main reason for dissatisfaction with the City of Burlington's provision of On-road Bike Lane services, whereas non-users were more likely to cite a bevy of reasons related to perceived bicycle hazards, nuisances, and traffic law violations as a reason for dissatisfaction with On-road Bike Lanes.

Most users of Off-road Bike Lanes were dissatisfied with the lack of bike paths in their area (41%) while non-users were more concerned with bike paths not being used (11%) or a lack of awareness of bike paths (8%).

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Summary of Significant Findings by Ward, Gender, Age

Ward

Ward 1

- *Residents in Ward 1 were significantly more likely to consider the maintenance and condition of City roadsides to be important when compared to those from wards 5 & 6 (82% compared to 72%, 68%).*
- *Residents from Ward 1 were significantly more likely than those from Ward 4 & Ward 6 to consider regular transit services important (56% compared to 36%, 36%).*
- *Those from Ward 1 were significantly more likely than those from Wards 3 & 6 to place importance on On-road bike lanes (47% compared to 33% and 35%).*
- *Residents in Ward 1 were significantly more likely to be satisfied with special transit services when compared to those in Ward 6 (59%, compared to 39%).*
- *Residents of Ward 1 were significantly more satisfied with on-road bike lanes when compared to those living in Ward 3 (58%, compared to 42%).*

Ward 2

- Residents in Ward 2 were significantly more likely to consider the maintenance and condition of City roadsides to be important when compared to those from wards 5 & 6 (85%, compared to 72%, 68%).
- Residents from Ward 2 were significantly more likely than those from Ward 4 & Ward 6 to consider regular transit services important (57%, compared to 36%, 36%).
- Those residing in Ward 2 were significantly more likely to consider special transit services important when compared to those in Wards 3, 4, 5 and 6 (59% compared to 42%, 35%, 39%, 39%).
- Those residing in Ward 2 were significantly more likely than those in Ward 6 to consider the availability of public parking important (80% compared to 64%).

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- Those residing in Ward 2 were significantly more likely than those in Wards 1, 3, 5 and 6 to consider the parks, open space and sports fields important (94% compared to 82%, 85%, 82% and 82% respectively).
- *Those from Ward 2 were significantly more likely than those from Wards 3 & 6 to place importance on On-road bike lanes (54% compared to 33% and 35%).*
- *Residents living in Ward 2 were significantly more likely than those in Wards 3, 4, or 6 to make use of regular transit on a regular basis (34%, compared to 15%, 15%, 19% respectively).*
- *Residents in Ward 2 were significantly more likely than those living in Wards 3 & 6 to make use of public parking on a daily basis (72%, compared to 54% each).*
- *Those living in Ward 2 were significantly more likely to make use of on-road bike Lanes when compared to residents of Ward 3 (32%, compared to 17%).*
- And finally, those living in Ward 2 were significantly more likely than those in Wards 1 & 5 to make use of off-road multi-use Bike Paths (40% compared to 24% each).
- *Residents living in Ward 2 were significantly more likely to show increased satisfaction for snow clearing from City roads when compared to those living in Ward 6 (82%, compared to 65%).*
- *Those living in Ward 2 were significantly more likely than those living in Ward 6 to show high satisfaction levels for regular transit (62%, compared to 46%).*
- *Residents in Ward 2 were significantly more likely to be satisfied with special transit services when compared to those in Ward 6 (64%, compared to 39%).*
- *Finally, those living in Ward 2 were significantly more satisfied with off-road multi-use bike paths when compared to those in Ward 6 (76%, compared to 60%).*

Ward 3

- Residents from Ward 3 were significantly more likely than those from Wards 1 & 6 to consider clearing of snow from city roads important (99%, compared to 93% and 91%).
- Residents in Ward 3 were significantly more likely to be satisfied with special transit services when compared to those in Ward 6 (58%, compared to 39%).

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Ward 4

- *Residents living in Ward 4 were significantly more likely to consider Burlington to be an excellent or very good place to live when compared to those living in Wards 1 & 2 (92%, compared to 80%, 82% respectively).*
- *Residents from Ward 4 were significantly more likely than those from Wards 1 and 6 to consider clearing of snow from city roads important (99%, compared to 93% and 91%).*
- *Those living in Ward 4 were significantly more likely than those in Wards 1 & 5 to make use of off-road multi-use Bike Paths (42% compared to 24% each).*

Ward 5

- Residents in Ward 5 were significantly more likely to be satisfied with special transit services when compared to those in Ward 6 (55%, compared to 39%).
- Residents living in Ward 5 were significantly more satisfied with City community centres when compared to those from Ward 1 (93%, compared to 80%).

Ward 6

- Those residents living in Ward 6 were significantly more likely to make use of city arenas on a regular basis when compared to those living in Wards 1, 3, and 5 (34%, compared to 20%, 17%, 17% respectively).
- Residents living in Ward 6 were significantly more likely to make use of community centres on a regular basis when compared to those living in Ward 4 (34%, compared to 28%).

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Gender

Female

- Women were significantly more likely than men to consider clearing of snow from city roads important (98%, compared to 93%).

Male

- Men were more likely than women to make use of city arenas on a regular basis (29%, compared to 18%).
- Men were also significantly more likely than women to make use of on-road Bike Lanes (29%, compared to 17%).
- Men were significantly more satisfied than women with the availability of public parking (63%, compared to 52%).

Age

18-34

- *Those residents aged 18-34 were significantly more likely than those aged 55+ to rate the importance of City arenas as high (62% compared to 45%).*
- *Residents aged 18-34 were significantly more likely than those aged 35-54 or 55+ to give a high importance rating to off-road bike paths (61%, compared to 47%, 41%).*
- *Residents aged 18-34 or 35-54 were considerably more likely to make use of City arenas when compared to those aged 55+ (32%, 28% compared to 10%).*
- *Those residents aged 18-34 were more likely to make use of parks, open Spaces, and sports fields on a regular basis when compared to those aged 55+ (73%, compared to 49%).*
- *Residents aged 18-34 were significantly more likely than those aged 55+ to make use of off-road multi-use bike paths (42% compared to 20%).*

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35-54

- *Importance was significantly higher among those aged 35-54 when compared to those aged 55+ when it comes to City community centres (78%, compared to 68%).*
- *Residents aged 35-54 were significantly more likely than those aged 55+ to make use of regular transit (18%, compared to 11%).*
- *Those aged 35-54 were significantly more likely to make use of City arenas when compared to those aged 55+ (28%, compared to 10%).*
- *Residents aged 35-54 were also significantly more likely to make use of community centres on a regular basis when compared to those aged 55+ (39% compared to 25%).*
- *Those aged 35-54 were more likely to make use of parks, open spaces, and sports fields when compared to those aged 55+ (74% compared to 49%).*
- *Residents aged 35-54 were significantly more likely than those aged 55+ to make use of on-road bike lanes (29%, compared to 14%).*
- *Residents aged 35-54 were significantly more likely than those aged 55+ to make use of off-road multi-use bike paths (35%, compared to 20%).*
- *Those aged 35-54 were significantly more likely to show a high level of dissatisfaction with the availability of public parking when compared to those aged 18-34 (13%, compared to 3%).*
- *Those residents aged 35-54 were significantly more satisfied with City arenas when compared to residents aged 55+ (74%, compared to 62%).*
- *Those aged 35-54 were significantly more satisfied with off-road multi-use bike paths when compared to those residents aged 55 or older (70%, compared to 58%).*

55+

- *Residents aged 55+ were significantly more likely to rate importance high for special transit services when compared to those aged 35-54 (49%, compared to 34%).*
- *Those aged 55+ were significantly more likely than those age 18-34 to indicate they felt on-road bike lanes were unimportant (39%, compared to 26%).*
- *Those aged 55+ were significantly more likely to show a high level of dissatisfaction with the availability of public parking when compared to those aged 18-34 (16%, compared to 3%).*

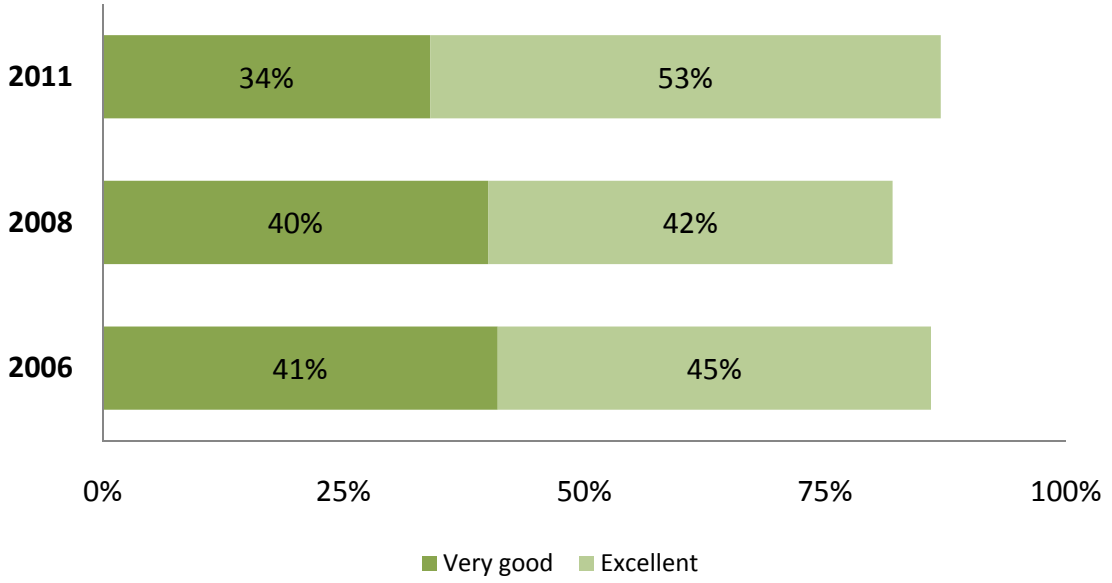
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Top-line Results

Percentages that are less than 1% but greater than 0% are denoted with an asterisk (*).

Overall Impression of Burlington as Place to Live

***Q1.** To start off, overall, how would you rate Burlington as a place to live? Would you say it is an excellent, very good, good, fair or poor place to live?*



Overall, the strong majority of residents of the City of Burlington consider the city to be an excellent or very good place to live (87%). This represents an increase of 5 percentage points since the last study conducted in 2008. The most notable change since 2008 was an eleven point increase in the proportion giving the city a rating of "Excellent". Residents living in Ward 4 were significantly more likely to consider Burlington to be an excellent or very good place to live when compared to those living in Wards 1 & 2 (92%, compared to 80%, 82% respectively).

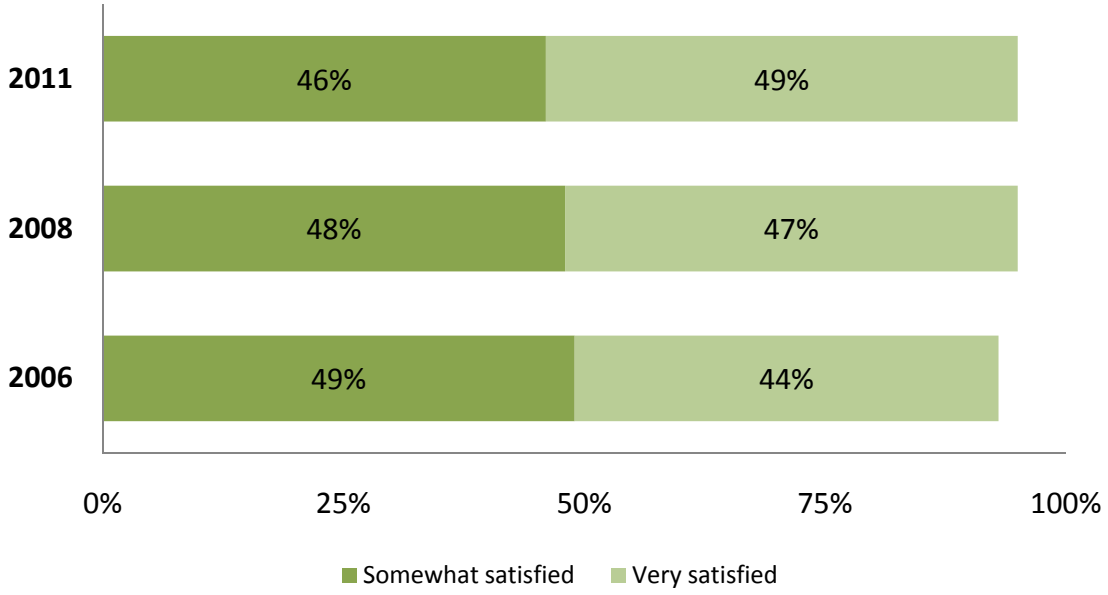
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Base: all respondents	*2011 (n=752)*	*2008 (n=750)*	*2006 (n=750)*
Excellent	53%	42%	45%
Very good	34%	40%	41%
Good	11%	14%	12%
Fair	1%	2%	1%
Poor	*	*	*
Don't know	-	-	*

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Overall Satisfaction with Quality of Services Provided by City of Burlington

Q2. *Again, generally speaking, how satisfied are you with the overall quality of services provided by the City of Burlington? Would you say you are…?*



Nearly all residents surveyed are either very or somewhat satisfied with the overall quality of services provided by the City of Burlington in 2011 (95%). This has not varied to any significant degree since 2006. There were no significant differences noted when examining results by gender and Ward sub-groups for this particular question in 2011.

Base: all respondents	*2011 (n=752)*	*2008 (n=750)*	*2006 (n=750)*
Very satisfied	49%	47%	44%
Somewhat satisfied	46%	48%	49%
Somewhat dissatisfied	4%	4%	6%
Very dissatisfied	1%	1%	*
Don't know	-	*	1%

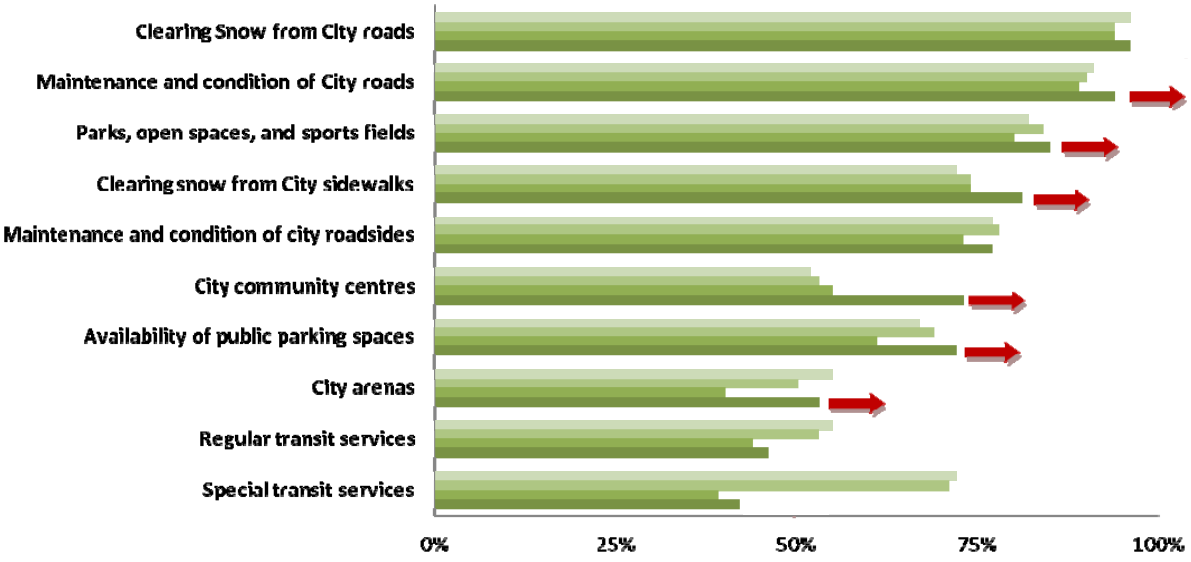
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Services – Importance, Usage, Satisfaction

Importance

Q3. *Now, I am going to read a number of different services and programs provided by the City of Burlington. For each, I would like you to tell me how important it is to you and your household – that is, is it extremely important, very important, somewhat important, not very important, or completely unimportant.*

**Please note minor change in scale from not at all important to completely unimportant in 2011*



	Special transit services	Regular transit services	City arenas	Availability of public parking spaces	City community centres	Maintenance and condition of city roadsides	Clearing snow from City sidewalks	Parks, open spaces, and sports fields	Maintenance and condition of City roads	Clearing Snow from City roads
2003	72%	55%	55%	67%	52%	77%	72%	82%	91%	96%
2005	71%	53%	50%	69%	53%	78%	74%	84%	90%	94%
2008	39%	44%	40%	61%	55%	73%	74%	80%	89%	94%
2011	42%	46%	53%	72%	73%	77%	81%	85%	94%	96%

Scores shown are Extremely Important / Very Important

****Arrows indicate significant increases compared to 2008 results.***

Importance of City of Burlington services has increased on all fronts when compared to 2008 results. The most notable gains were for the City arenas (40% → 53%), City community centres (55% → 73%), and clearing snow from City sidewalks (74% → 81%).

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Residents in Wards 1 & 2 were significantly more likely to consider the maintenance and condition of City roadsides to be important when compared to those from wards 5 & 6 (82%, 85%, compared to 72%, 68%).

Residents from Wards 3 & 4 were significantly more likely than those from Wards 1 and 6 to consider clearing of snow from city roads important (99% each, compared to 93% and 91%). Women were significantly more likely than men to consider clearing of snow from city roads important (98%, compared to 93%).

Residents from Wards 1 & 2 were significantly more likely than those from Ward 4 & Ward 6 to consider regular transit services important (56%, 57%, compared to 36%, 36%).

Those residing in Ward 2 were significantly more likely to consider special transit services important when compared to those in Wards 3, 4, 5 and 6 (59% compared to 42%, 35%, 39%, 39%). Residents aged 55+ were significantly more likely to rate importance high for special transit services when compared to those aged 35-54 (49%, compared to 34%).

Those residents aged 18-34 and 35-54 were significantly more likely than those aged 55+ to rate the importance of City arenas as high (62% and 55%, compared to 45%).

Importance of community centres was significantly higher among those residents from Ward 6 when compared to those residing in Ward 1 (81% compared to 66%), and was significantly higher among those aged 35-54 when compared to those aged 55+ (78%, compared to 68%).

Those residing in Ward 2 were significantly more likely than those in Ward 6 to consider the availability of public parking important (80% compared to 64%).

Those residing in Ward 2 were significantly more likely than those in Wards 1, 3, 5 and 6 to consider the parks, open space and sports fields important (94% compared to 82%, 85%, 82% and 82% respectively).

Those from Wards 1 & 2 were significantly more likely than those from Wards 3 & 6 to place importance on on-road bike lanes (47% and 54% compared to 33% and 35%), and those aged 55+ were significantly more likely than those age 18-34 to indicate they felt on-road bike lanes were unimportant (39%, compared to 26%).

Residents aged 18-34 were significantly more likely than those aged 35-54 or 55+ to give a high importance rating to off-road bike paths (61%, compared to 47%, 41%).

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Base: all respondents	2011 (n=752)	2008 (n=750)	2006 (n=750)	2003 (n=750)
Clearing snow from City roads				
Extremely important	37%	36%	39%	46%
Very important	59%	58%	55%	50%
Somewhat important	4%	4%	5%	3%
Not very important	1%	1%	*	1%
Completely unimportant	*	*	1%	-
Don't know	-	*	1%	*
Maintenance and condition of City roads				
Extremely important	31%	25%	30%	31%
Very important	63%	64%	60%	60%
Somewhat important	5%	10%	8%	8%
Not very important	*	1%	1%	*
Completely unimportant	-	*	*	*
Don't know	-	-	*	-
Parks, open spaces, and sports fields				
Extremely important	30%	25%	32%	31%
Very important	55%	55%	52%	51%
Somewhat important	11%	15%	12%	13%
Not very important	3%	4%	3%	4%
Completely unimportant	1%	2%	1%	1%
Don't know	-	-	*	-
Clearing snow from City sidewalks				
Extremely important	28%	23%	24%	24%
Very important	53%	51%	50%	48%
Somewhat important	12%	18%	17%	17%
Not very important	5%	6%	6%	7%
Completely unimportant	2%	2%	2%	2%
Don't know	-	1%	1%	1%
Maintenance and condition of city roadsides				
Extremely important	19%	17%	21%	21%
Very important	58%	56%	57%	56%
Somewhat important	20%	24%	20%	20%
Not very important	3%	2%	1%	2%
Completely unimportant	1%	*	*	*
Don't know	-	-	*	-

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Base: all respondents	2011 (n=752)	2008 (n=750)	2006 (n=750)	2003 (n=750)
Availability of public parking spaces				
Extremely important	22%	14%	18%	18%
Very important	50%	47%	51%	49%
Somewhat important	22%	30%	23%	27%
Not very important	5%	7%	6%	5%
Completely unimportant	2%	2%	2%	1%
Regular transit services				
Extremely important	14%	13%	17%	17%
Very important	32%	31%	36%	38%
Somewhat important	20%	17%	18%	17%
Not very important	22%	17%	15%	17%
Completely unimportant	13%	19%	12%	10%
City community centres				
Extremely important	24%	12%	14%	12%
Very important	50%	43%	39%	40%
Somewhat important	15%	26%	27%	30%
Not very important	9%	11%	13%	13%
Completely unimportant	2%	8%	6%	4%
On-road Bike Lanes *New Question				
Extremely important	11%			
Very important	30%			
Somewhat important	26%			
Not very important	21%			
Completely unimportant	12%			
Off-road Multi-use Bike Paths *New Question				
Extremely important	13%			
Very important	36%			
Somewhat important	24%			
Not very important	17%			
Completely unimportant	10%			
Special transit services				
Extremely important	13%	11%	26%	28%
Very important	29%	28%	45%	44%
Somewhat important	16%	14%	9%	11%
Not very important	25%	14%	16%	11%
Completely unimportant	17%	26%	2%	5%
Don’t know	-	6%	2%	1%

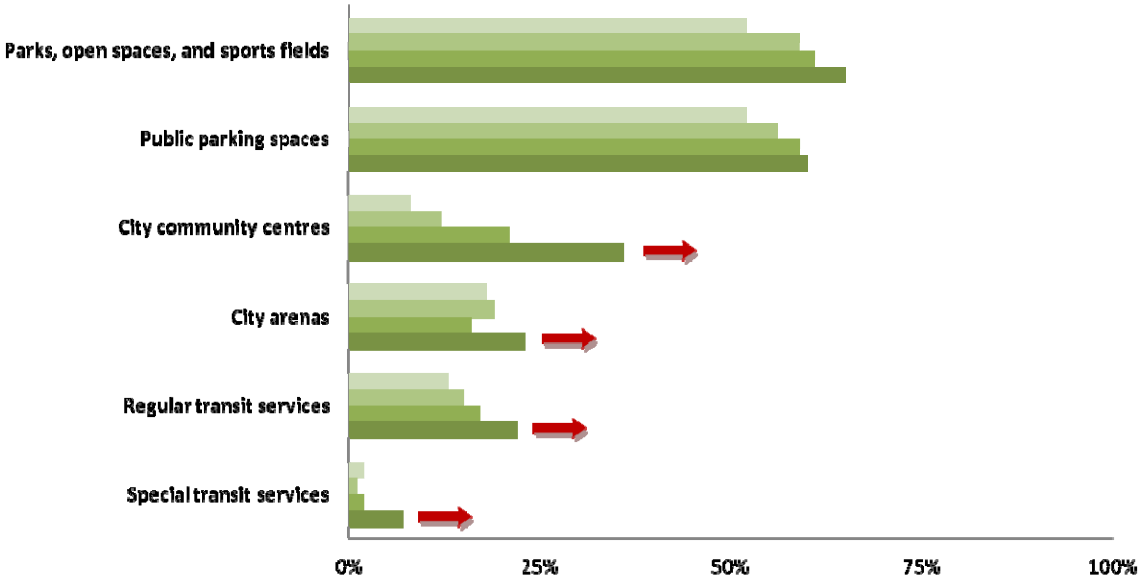
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Base: all respondents	*2011 (n=752)*	*2008 (n=750)*	*2006 (n=750)*	*2003 (n=750)*
City arenas				
Extremely important	15%	8%	14%	15%
Very important	39%	32%	36%	40%
Somewhat important	21%	26%	24%	25%
Not very important	17%	18%	16%	13%
Completely unimportant	9%	15%	9%	6%
Don't know	-	1%	1%	*

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Usage

Q4. *And, please tell me what* ***BEST*** *represents how often you and your household use the service or program – that is, if you use it at least once a day, once a week, once a month, once a year, or never / not in the past year.*



	Special transit services	Regular transit services	City arenas	City community centres	Public parking spaces	Parks, open spaces, and sports fields
2003	2%	13%	18%	8%	52%	52%
2006	1%	15%	19%	12%	56%	59%
2008	2%	17%	16%	21%	59%	61%
2011	7%	22%	23%	36%	60%	65%

Box scores shown (At least once a day, At least once a week)
****Arrows indicate significant increases compared to 2008 results.***

Resident usage of City of Burlington services has increased considerably for community centres (21% → 36%), city arenas (16% → 23%), regular and special transit services (17% → 22%, 2% → 7% respectively) since 2008.

Residents living in Ward 2 were significantly more likely than those in Wards 3, 4, or 6 to make use of regular transit on a regular basis (34%, compared to 15%, 15%, 19% respectively), as well as those aged 18-34 when compared to residents aged 35-54 (41%, compared to 18%), and residents aged 35-54 when compared to those aged 55+ (18%, compared to 11%).

Those residents living in Ward 6 were significantly more likely to make use of city arenas on a regular basis when compared to those living in Wards 1, 3, and 5 (34%, compared to 20%,

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17%, 17% respectively), and residents aged 18-34 or 35-54 were considerably more likely to do the same when compared to those aged 55+ (32%, 28% compared to 10%). Men were more likely than women to make use of city arenas on a regular basis (29%, compared to 18%).

Residents living in Ward 6 were significantly more likely to make use of community centres on a regular basis when compared to those living in Ward 4 (34%, compared to 28%), and those aged 18-34 & 35-54 were more likely to do the same when compared to those aged 55+ (44%, 39%, compared to 25%).

Residents in Ward 2 were significantly more likely than those living in Wards 3 & 6 to make use of public parking on a daily basis (72%, compared to 54% each).

Those residents aged 18-34 or 35-54 were more likely to make use of parks, open Spaces, and sports fields on a regular basis when compared to those aged 55+ (73%, 74%, compared to 49%).

Those living in Ward 2 were significantly more likely to make use of on-road bike Lanes when compared to residents of Ward 3 (32%, compared to 17%), and those aged 35-54 were more likely to do so when compared to those aged 55+ (29%, compared to 14%). Men were also significantly more likely than women to make use of on-road Bike Lanes (29%, compared to 17%).

And finally, those living in Wards 2 & 4 were significantly more likely than those in Wards 1 & 5 to make use of off-road multi-use Bike Paths (40%, 42% compared to 24% each), and those aged 18-34 & 35-54 were significantly more likely than those aged 55+ to do the same (42%, 35%, compared to 20%).

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Base: all respondents	2011 (n=752)	2008 (n=750)	2006 (n=750)	2003 (n=750)
On-road Bike Lanes* New Question				
At least once a day	7%			
At least once a week	16%			
At least once a month	16%			
At least once a year	13%			
Never	49%			
Don't know	-			
Off-road Multi-use Bike Paths* New Question				
At least once a day	9%			
At least once a week	23%			
At least once a month	21%			
At least once a year	13%			
Never	35%			
Don't know	-			
Regular transit services				
At least once a day	14%	8%	8%	7%
At least once a week	8%	9%	7%	6%
At least once a month	11%	12%	8%	7%
At least once a year	12%	16%	14%	13%
Never	56%	54%	62%	67%
Don't know	-	*	1%	-
Special transit services				
At least once a day	4%	*	*	1%
At least once a week	3%	2%	1%	1%
At least once a month	5%	3%	3%	2%
At least once a year	7%	4%	2%	1%
Never	82%	88%	93%	95%
Don't know		3%	1%	-
Public parking spaces				
At least once a day	17%	15%	15%	14%
At least once a week	43%	44%	41%	38%
At least once a month	29%	31%	32%	36%
At least once a year	6%	5%	6%	8%
Never	5%	5%	5%	3%
Don't know	-	*	*	*

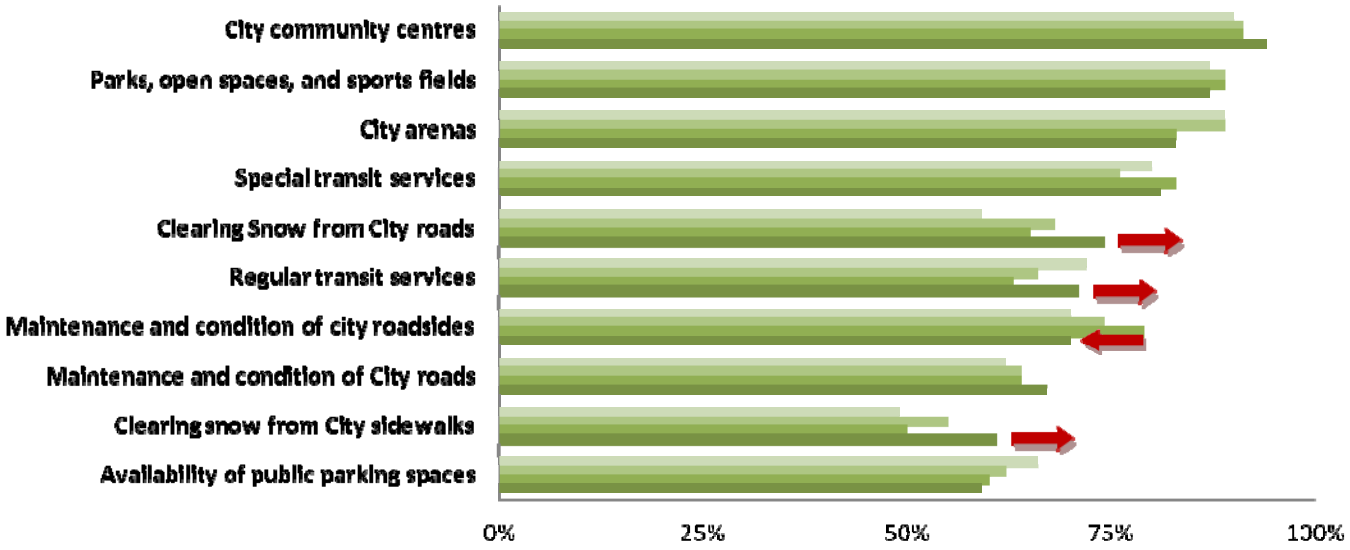
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Base: all respondents	2011 (n=752)	2008 (n=750)	2006 (n=750)	2003 (n=750)
Parks, open spaces, and sports fields				
At least once a day	21%	16%	16%	14%
At least once a week	44%	45%	43%	38%
At least once a month	23%	23%	24%	30%
At least once a year	5%	8%	10%	10%
Never	7%	8%	7%	8%
Don't know	-	*	*	*
City Arenas				
At least once a day	5%	1%	1%	2%
At least once a week	18%	15%	18%	16%
At least once a month	17%	14%	12%	14%
At least once a year	20%	22%	24%	24%
Never	41%	47%	44%	44%
Don't know	-	1%	1%	*
City community centres				
At least once a day	6%	2%	1%	*
At least once a week	30%	19%	11%	8%
At least once a month	26%	24%	19%	19%
At least once a year	17%	22%	27%	30%
Never	21%	32%	41%	42%
Don't know	-	1%	1%	*

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Satisfaction

Q5. *And, thinking about your level of satisfaction with this service, how would you rate it – would that be excellent, good, fair, poor, or very poor?*



	Availability of public parking spaces	Clearing snow from City sidewalks	Maintenance and condition of City roads	Maintenance and condition of city roadsides	Regular transit services	Clearing Snow from City roads	Special transit services	City arenas	Parks, open spaces, and sports fields	City community centres
2003	66%	49%	62%	70%	72%	59%	80%	89%	87%	90%
2006	62%	55%	64%	74%	66%	68%	76%	89%	89%	91%
2008	60%	50%	64%	79%	63%	65%	83%	83%	89%	91%
2011	59%	61%	67%	70%	71%	74%	81%	88%	87%	94%

Scores shown are (Excellent, Good)

****Arrows indicate significant increases compared to 2008 results.***

Satisfaction with City of Burlington services increased considerably for snow clearing from City sidewalks / roads (50% → 61%; 65% → 74% respectively), and regular transit services (63% → 71%) since 2008.

Residents living in Wards 1 and 2 were significantly more likely to show increased satisfaction for snow clearing from City roads when compared to those living in Ward 6 (80%, 82%, compared to 65%), and those residents aged 55+ were significantly more likely to have a high

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satisfaction rating with snow clearing when compared to those aged 35-54 (83%, compared to 68%).

Those living in Ward 2 were significantly more likely than those living in Ward 6 to show high satisfaction levels for regular transit (62%, compared to 46%).

Residents in Wards 1, 2, 3, and 5 were significantly more likely to be satisfied with special transit services when compared to those in Ward 6 (59%, 64%, 58%, and 55%, compared to 39%).

Residents living in Ward 5 were significantly more satisfied with City community centres when compared to those from Ward 1 (93%, compared to 80%).

Men were significantly more satisfied than women with the availability of public parking (63%, compared to 52%), and those aged 35-54 or 55+ were significantly more likely to show a high level of dissatisfaction with the availability of public parking when compared to those aged 18-34 (13%, 16%, compared to 3%).

Those residents aged 35-54 were significantly more satisfied with City arenas when compared to residents aged 55+ (74%, compared to 62%).

Residents of Ward 1 were significantly more satisfied with on-road bike lanes when compared to those living in Ward 3 (58%, compared to 42%), and residents aged 18-34 were significantly more satisfied with on-road bike lanes when compared to those aged 35-54 or 55+ (62%, compared to 47%, 46%).

Finally, those living in Ward 2 were significantly more satisfied with off-road multi-use bike paths when compared to those in Ward 6 (76%, compared to 60%), and those aged 18-34 & 35-54 were significantly more satisfied with this service when compared to those aged 55+ (77%, 70%, compared to 58%).

Sample sizes in the table below reflect those who have used the service.

Base: Have used this service	***2011***	***2008***	***2006***	***2003***
Maintenance and condition of City roads				
	(n=752)	**(n=750)**	**(n=750)**	**(n=750)**
Excellent	15%	8%	11%	9%
Good	52%	56%	53%	53%
Fair	24%	26%	25%	28%
Poor	7%	8%	8%	8%
Very poor	2%	2%	2%	2%
Don't know	-	-	1%	-

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Base: Have used this service	*2011*	*2008*	*2006*	*2003*
Maintenance & condition of the roadsides				
	(n=752)	(n=750)	(n=750)	(n=750)
Excellent	16%	22%	22%	18%
Good	54%	57%	52%	52%
Fair	22%	16%	19%	23%
Poor	6%	3%	5%	6%
Very poor	1%	1%	2%	1%
On-road Bike Lanes* New Question				
	(n=383)			
Excellent	14%			
Good	47%			
Fair	29%			
Poor	7%			
Very poor	1%			
Off-road Multi-use Bike Paths* New Question				
	(n=492)			
Excellent	27%			
Good	51%			
Fair	19%			
Poor	2%			
Very poor	1%			
Don't know	*			
Clearing snow from City roads				
	(n=752)	(n=750)	(n=750)	(n=750)
Excellent	26%	15%	19%	13%
Good	48%	50%	49%	46%
Fair	16%	23%	20%	22%
Poor	7%	8%	10%	14%
Very poor	3%	3%	2%	5%
Don't know	-	2%	1%	*

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Base: Have used this service	2011	2008	2006	2003
Clearing snow from City sidewalks				
	(n=750)	(n=750)	(n=750)	(n=750)
Excellent	19%	10%	12%	7%
Good	42%	40%	43%	42%
Fair	24%	29%	28%	33%
Poor	8%	13%	12%	14%
Very poor	6%	4%	2%	3%
Regular transit services				
	(n=333)	(n=333)	(n=278)	(n=246)
Excellent	19%	12%	22%	19%
Good	52%	51%	44%	53%
Fair	22%	24%	24%	18%
Poor	7%	10%	7%	8%
Very poor	1%	2%	4%	2%
Special transit services				
	(n=139)	(n=66)	(n=46)	(n=38)
Excellent	32%	16%	28%	33%
Good	49%	67%	48%	47%
Fair	15%	15%	9%	9%
Poor	3%	-	9%	6%
Very poor	1%	3%	-	3%
Don't know	1%	-	5%	3%
Availability of public parking spaces				
	(n=715)	(n=710)	(n=709)	(n=723)
Excellent	15%	7%	10%	11%
Good	44%	53%	52%	55%
Fair	29%	28%	26%	25%
Poor	8%	9%	9%	7%
Very poor	3%	3%	3%	1%
Don't know	1%	*	-	*

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Base: Have used this service	*2011*	*2008*	*2006*	*2003*
Parks, open spaces, and sports fields				
	(n=697)	(n=688)	(n=700)	(n=688)
Excellent	39%	27%	36%	28%
Good	48%	62%	53%	59%
Fair	12%	9%	8%	9%
Poor	1%	1%	2%	3%
Very poor	1%	1%	1%	1%
Don't know	-	*	-	-
City community centres				
	(n=592)	(n=508)	(n=440)	(n=429)
Excellent	44%	29%	27%	28%
Good	50%	62%	64%	62%
Fair	5%	8%	7%	9%
Poor	1%	-	*	*
Very poor	1%	-	*	-
Don't know	-	1%	1%	*
City Arenas				
	(n=447)	(n=386)	(n=416)	(n=418)
Excellent	27%	16%	26%	26%
Good	56%	67%	63%	63%
Fair	14%	15%	10%	8%
Poor	1%	2%	1%	2%
Very poor	1%	-	1%	0%
Don't know	1%	1%	*	*

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Reasons for Dissatisfaction

B3. *And, what is the* ***ONE MAIN*** *reason why you give this service a poor rating?*

*Base: Users**	*2011*
Maintenance and condition of City roads **(n=65)**	
Poor condition or road surfaces / Roads are not maintained / Have not been repaired for too long	79%
Roads are not plowed / Snow is not removed	14%
Other	7%
Maintenance & condition of the roadsides **(n=55)**	
Poor condition of road surfaces (potholes, cracks, bumps)	26%
Roadsides are covered in litter / garbage / debris)	23%
Roadsides are not salted / cleared of snow	16%
Roadsides are not maintained / Have not been repaired for too long	15%
Slow pace of construction	15%
Roadsides are not weeded	9%
Poor condition of sidewalks (uneven surfaces, crack)	5%
Other	3%
Clearing snow from City roads **(n=68)**	
It takes several days for my road to be cleared / My road does not get plowed / Snow clearing it too slow / Takes a long time to get it done	47%
Roads are not fully cleared of snow / not properly cleared	28%
They aren't well prepared for storms	8%
Road surfaces are still slippery / dangerous	8%
They cause property damage (lawn, curbs, etc.)	5%
There are not enough plows to do the work	2%
Other	2%
Clearing snow from City sidewalks **(n=105)**	
They cause property damage (lawn, curb, etc.)	25%
Sidewalks are left in dangerous condition (snow, ice, slippery)	24%
Sidewalk clearing is not done in a timely manner / Takes too long	19%
They don't clear the sidewalks in my area	11%
Sidewalk clearing is sporadic / inconsistent	8%
They dump the snow on my property	5%
I've fallen on unclear / slippery sidewalks	3%
Plow operator doesn't seem able to find the sidewalk	2%
Other	3%

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Base: Users*	2011
Regular transit services (n=22)	
Long wait for buses at bus stops / buses are often late	37%
Inefficient routes / Too many transfers	19%
Not enough buses / Infrequent service	14%
Not enough routes / Routes don't reach where I need to go	9%
Service stops too early / Lack of off-peak / Night services	7%
Other	13%
Availability of public parking spaces (n=94)	
Difficult to find a parking spot / No parking available	37%
Lack of parking in the downtown core	18%
No free public parking	17%
Cost of parking / Too expensive / Have to pay for parking at city parks	15%
Not enough parking during festivals / events	6%
Cannot park longer than 3 hours without being ticketed	3%
Hard for visitors / tourists to find parking	2%
Other	1%
Parks, open spaces, and sports fields (n=13)	
Parks are not lit at night	29%
Poor maintenance of parks and sport fields (garbage, snow, turf)	27%
Losing our parks / Parks have been built over	21%
Lack of outdoor facilities	17%
Other	7%
On-road Bike Lanes (n=38)	
There are not enough bike lanes / I've never seen any	51%
Bike lanes end suddenly / Don't connect to each other	10%
Bike lanes are unsafe / dangerous	9%
Bike lanes are too narrow	8%
Bike lanes are not well maintained	8%
Take up too much space on the road / Not enough room for them	7%
Bikes should not be allowed on the street / road	2%
Bikers do not obey traffic laws	1%
Other	4%
Off-road Bike Lanes (n=16)	
Not enough bike paths in my area	41%
Bike paths don't connect to each other / Don't go anywhere	22%
Bike paths are not cleared or maintained	20%
Other	17%

*Special transit services, City arenas, City community centres sample too small to report (n=3, 3, 8)

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City of Burlington Information Source Usage & Preference

Q6. *Thinking now of the information available on the City of Burlington's programs and services, please tell me which of the following sources you currently use to find out about these programs and services?*

Base: all respondents	*2011 (n=752)*
The Burlington Post	76%
City website/www.burlington.ca	57%
The City Recreation and Leisure Guide/Live & Play Guide	56%
Mailings to your home from the City of Burlington	47%
Media/general coverage/print, radio, television	40%
City Update feature/every Thursday in The Burlington Post	33%
City Talk Newsletter/delivered to your home three times a year	29%
Online media/like www.burlington.net/www.ourburlington.org	28%
Cogeco cable Television	25%
From your ward councillor	17%
E-mail information updates from the City of Burlington website/Webminder	13%
Directly from city staff	9%
Social media/Twitter/Facebook	8%
Attending public/City council/Standing Committee of Council meetings	6%

The Burlington Post, The City Website, and the City Recreation and Leisure guide are the top three sources residents use when they want to find out about programs and services.

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Q7. *Thinking about the sources of information available on the City of Burlington's programs and services that I just listed please tell me which one you would most prefer on a regular basis?*

Base: all respondents	*2011 (n=752)*
The Burlington Post	33%
City website/www.burlington.ca	25%
The City Recreation and Leisure Guide/Live & Play Guide	14%
Mailings to your home from the City of Burlington	7%
Online media/like www.burlington.net/www.ourburlington.org	5%
City Talk Newsletter/delivered to your home three times a year	3%
Media/general coverage/print, radio, television	3%
Cogeco cable Television	3%
E-mail information updates from the City of Burlington website/Webminder	3%
City Update feature/every Thursday in The Burlington Post	2%
From your ward councillor	1%
Social media/Twitter/Facebook	1%

The Burlington Post, The City Website, and the City Recreation and Leisure guide are the top three sources residents prefer to use on a regular basis when they want to find out about programs and services.

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City of Burlington Input Method Participation Likelihood

Q8B. *The City of Burlington regularly looks for input from its residents on its programs and services. To this end, the City of Burlington is seeking new methods of public involvement. Which of the following are you likely to participate in?*

Base: all respondents	*2011 (n=752)*
Internet Surveys	47%
Contacting the Mayor and/or your Ward Councillor	29%
City of Burlington Facebook Page	20%
Focus Groups	20%
Neighbourhoods/Ward Committee Meetings	19%
Town Hall meetings	18%
Citizen Advisory Committees	14%
Workshops	12%
DK/None	20%

Nearly half of respondents said they would likely participate in Internet Surveys and one quarter would contact the Mayor and / or Ward Councillor.

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City of Burlington Resident Input & Engagement Satisfaction

Q9. *Based on your personal experience or what you have heard from others, how would you rate your satisfaction with the effort that the City of Burlington is doing currently in seeking input and engaging with residents on its programs and services? Would you say you are...?*

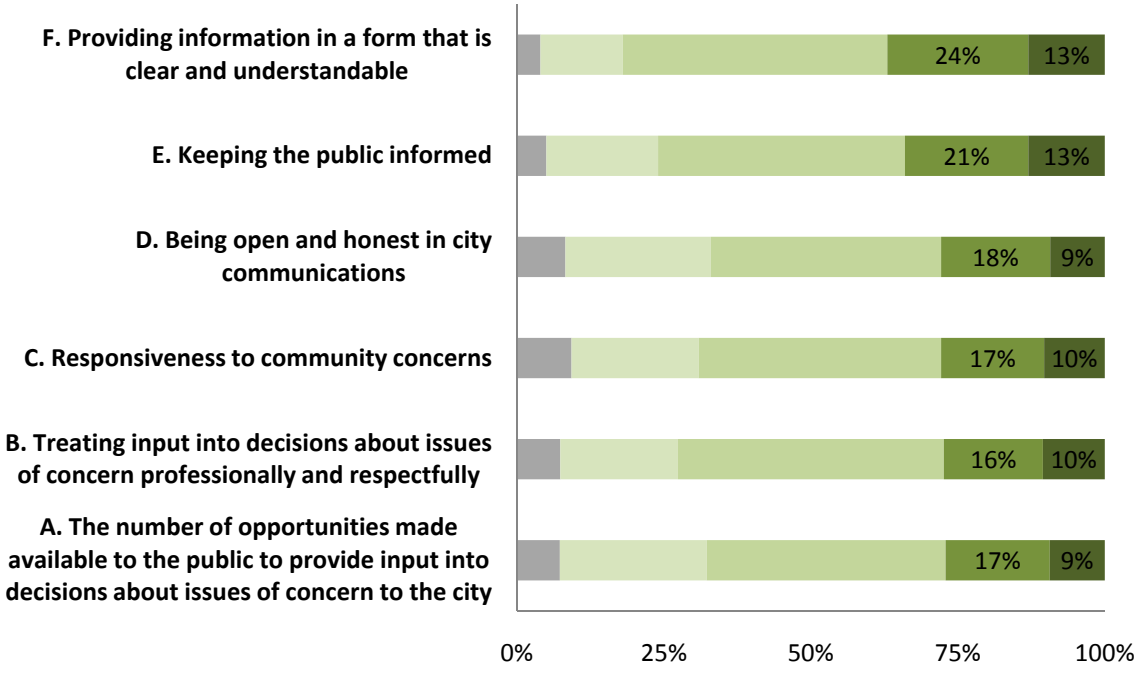
Base: all respondents	*2011 (n=752)*
Very Satisfied	26%
Somewhat Satisfied	56%
Not Very Satisfied	10%
Not Satisfied at all	3%
Don't Know	5%

More than 4 out of 5 respondents said they were either very or somewhat satisfied with the effort that the City of Burlington is doing currently in seeking input and engaging with residents. However, the largest proportion fell into the "somewhat satisfied" category, suggesting that there is room for improvement here.

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City of Burlington Aspect Ratings

Q10. *For each of the following statements please tell me how would you rate the City of Burlington using the scale: Excellent, Very Good, Good, Fair or Poor...*



	A. The number of opportunities made available to the public to provide input into decisions about issues of concern to the city	B. Treating input into decisions about issues of concern professionally and respectfully	C. Responsiveness to community concerns	D. Being open and honest in city communications	E. Keeping the public informed	F. Providing information in a form that is clear and understandable
Poor	7%	7%	9%	8%	5%	4%
Fair	24%	19%	21%	24%	19%	14%
Good	39%	43%	40%	38%	42%	45%
Very good	17%	16%	17%	18%	21%	24%
Excellent	9%	10%	10%	9%	13%	13%

The largest proportion of respondents for any of the activities mentioned fall into the "good" rating, suggesting that there is certainly room for improvement on all the items.

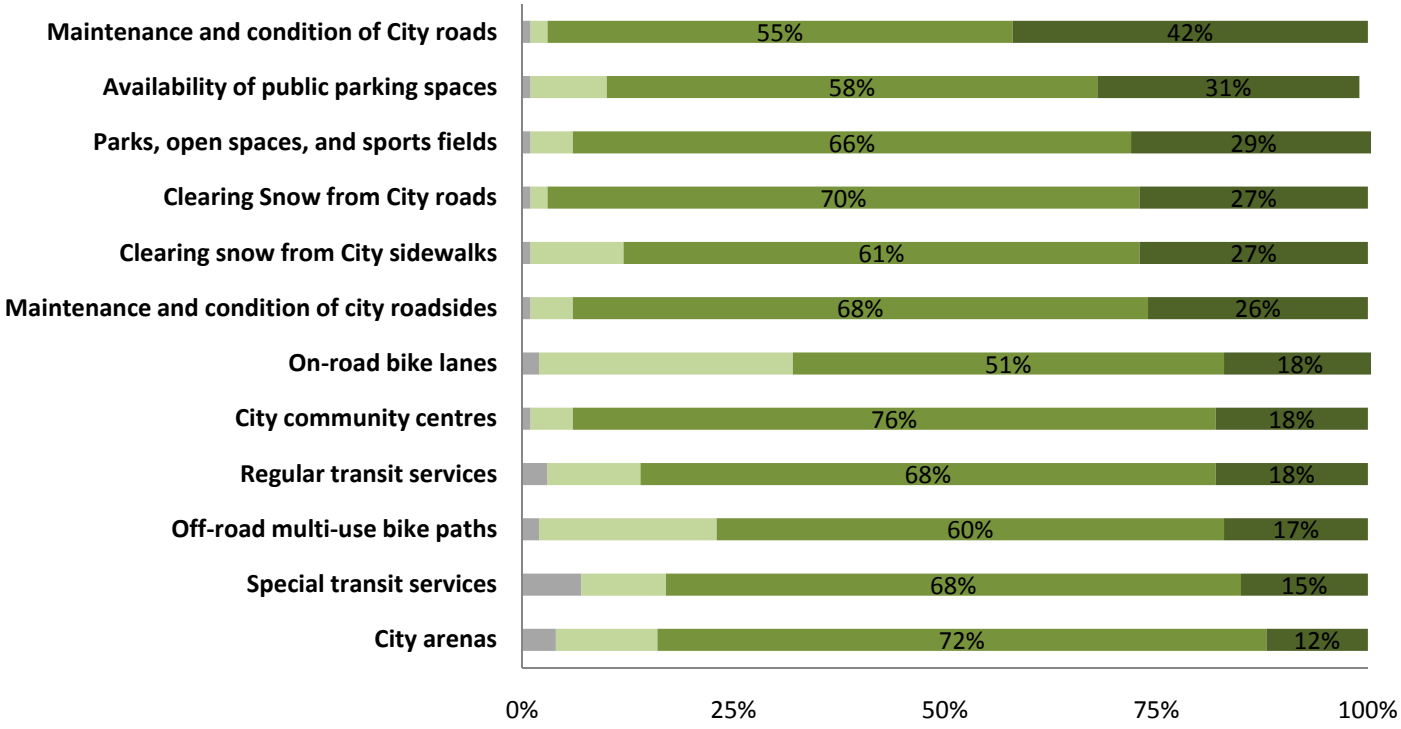
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Base: all respondents	*2011 (n=752)*
A. The number of opportunities made available to the public to provide input into decisions about issues of concern to the city	
Excellent	9%
Very Good	17%
Good	39%
Fair	24%
Poor	7%
B. Treating input into decisions about issues of concern professionally and respectfully	
Excellent	10%
Very Good	16%
Good	43%
Fair	19%
Poor	7%
C. Responsiveness to community concerns	
Excellent	10%
Very Good	17%
Good	40%
Fair	21%
Poor	9%
D. Being open and honest in city communications	
Excellent	9%
Very Good	18%
Good	38%
Fair	24%
Poor	8%
E. Keeping the public informed	
Excellent	13%
Very Good	21%
Good	42%
Fair	19%
Poor	5%
F. Providing information in a form that is clear and understandable	
Excellent	13%
Very Good	24%
Good	45%
Fair	14%
Poor	4%

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City of Burlington Budget Spending*

Q11. *Now thinking about spending of the City budget, do you think the City should be spending more, less or about the same amount on each of the following services and programs?*



	City arenas	Special transit services	Off-road multi-use bike paths	Regular transit services	City community centres	On-road bike lanes	Maintenance and condition of city roadsides	Clearing snow from City sidewalks	Clearing Snow from City roads	Parks, open spaces, and sports fields	Availability of public parking spaces	Maintenance and condition of City roads
Don't know	4%	7%	2%	3%	1%	2%	1%	1%	1%	1%	1%	1%
Less	12%	10%	21%	11%	5%	30%	5%	11%	2%	5%	9%	2%
Same	72%	68%	60%	68%	76%	51%	68%	61%	70%	66%	58%	55%
More	12%	15%	17%	18%	18%	18%	26%	27%	27%	29%	31%	42%

In terms of increasing spending on certain programs and services, Maintenance and Condition of City Roads, Availability of Public Parking Spaces and Parks, Open Space, and Sports Field have emerged as the top three.

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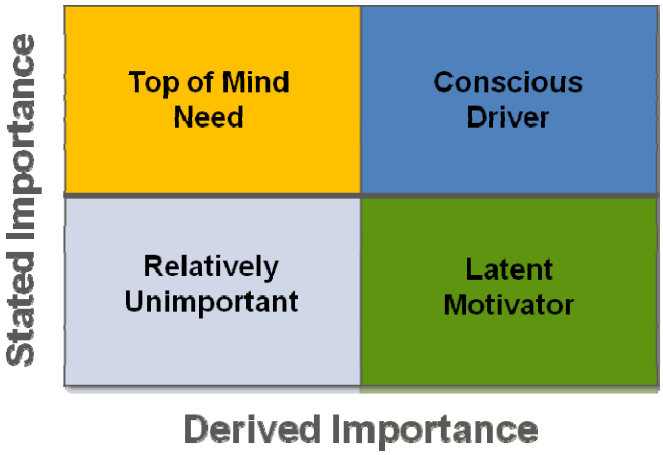
Base: all respondents	*2011 (n=752)*
A. Maintenance and condition of city roads	
More	42%
Same	55%
Less	2%
Don't know	1%
B. Maintenance and condition of city roadsides	
More	26%
Same	68%
Less	5%
Don't know	1%
C. Clearing snow from city roads	
More	27%
Same	70%
Less	2%
Don't know	1%
D. Clearing snow from city sidewalks	
More	27%
Same	61%
Less	11%
Don't know	1%
E. Regular transit services	
More	18%
Same	68%
Less	11%
Don't know	3%
F. Special transit services	
More	15%
Same	68%
Less	10%
Don't know	7%
G. City arenas	
More	12%
Same	72%
Less	12%
Don't know	4%

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Base: all respondents	*2011 (n=752)*
H. City community centres	
More	18%
Same	76%
Less	5%
Don't know	1%
I. Availability of public parking	
More	31%
Same	58%
Less	9%
Don't know	1%
J. Parks, open space and sports fields	
More	29%
Same	66%
Less	5%
Don't know	1%
K. On-road bike lanes	
More	18%
Same	51%
Less	30%
Don't know	2%
L. Off-Road multi use bike paths	
More	17%
Same	60%
Less	21%
Don't know	2%

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Derived vs. Stated Importance



Stated Importance

Advantages

- Very easy to ascertain
- Simple interpretation

Disadvantages

- Costly and time consuming
- Measures what is philosophically, politically or socially important rather than what is important to bringing about outcomes

Derived Importance

Advantages

- Fewer questions need to be asked without losing information
- Improved data quality is associated with the lower likelihood of respondent fatigue
- Determine which attributes contribute significantly to the overall construct, say, satisfaction and which don't
- statistically test the validity of the model

Disadvantages

- Requires knowledge of statistical modelling

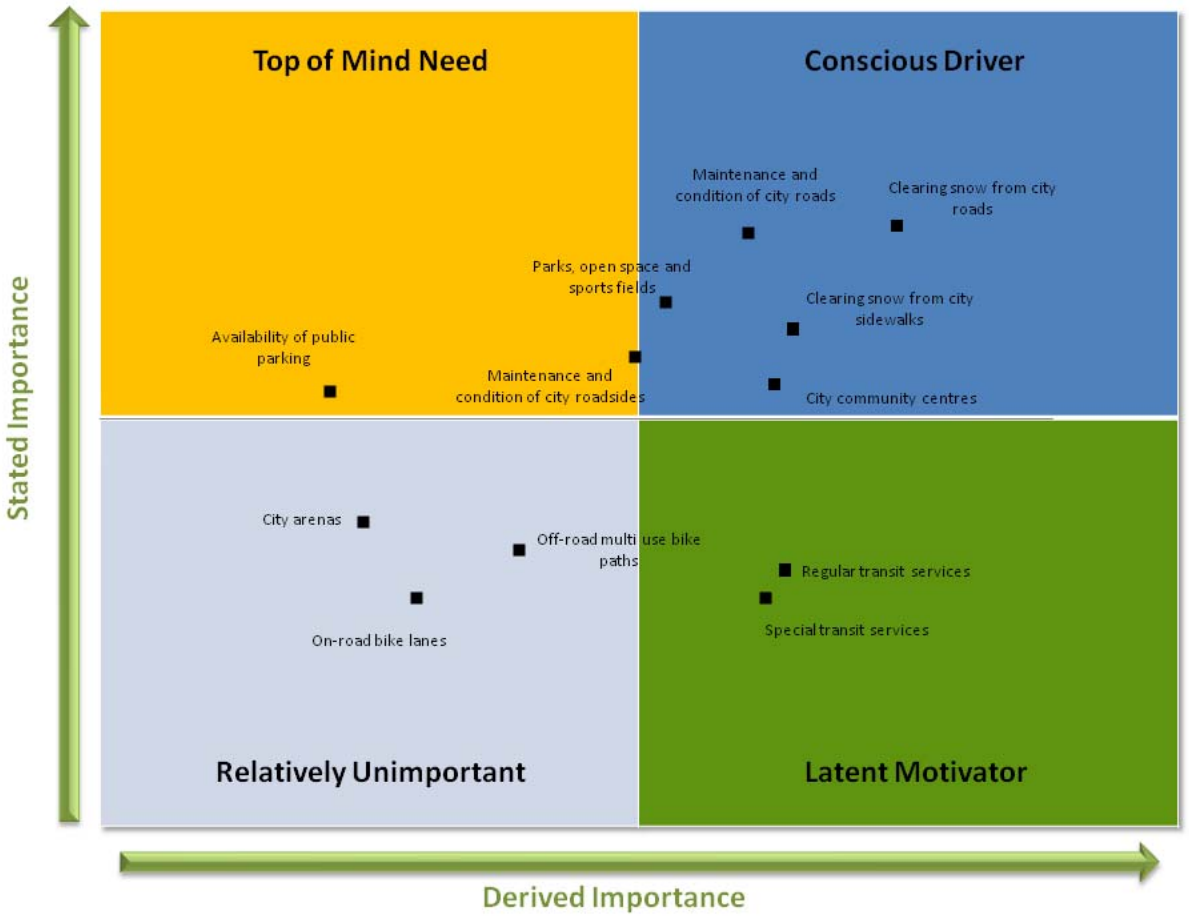
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Derived Importance is a statistical calculation based on the correlation between the independent variables (input variables) and a dependent variable (outcome variable). The correlation between satisfaction with services and programs (inputs) and overall satisfaction with the services and programs provided by the city (outcome) reveals the extent to which the input variables are related to or drive the outcome variable.

Stated Importance relies simply on people stating how important something is using a scale question.

It is generally regarded in marketing research that stated importance is not as reliable as derived importance because people over or under state the importance of attributes for a variety of reasons. Driver analysis relies upon the correlation between variables or attributes and allows for a predictive model to determine how much improvement in the input variables will contribute to improvement in the outcome variable.

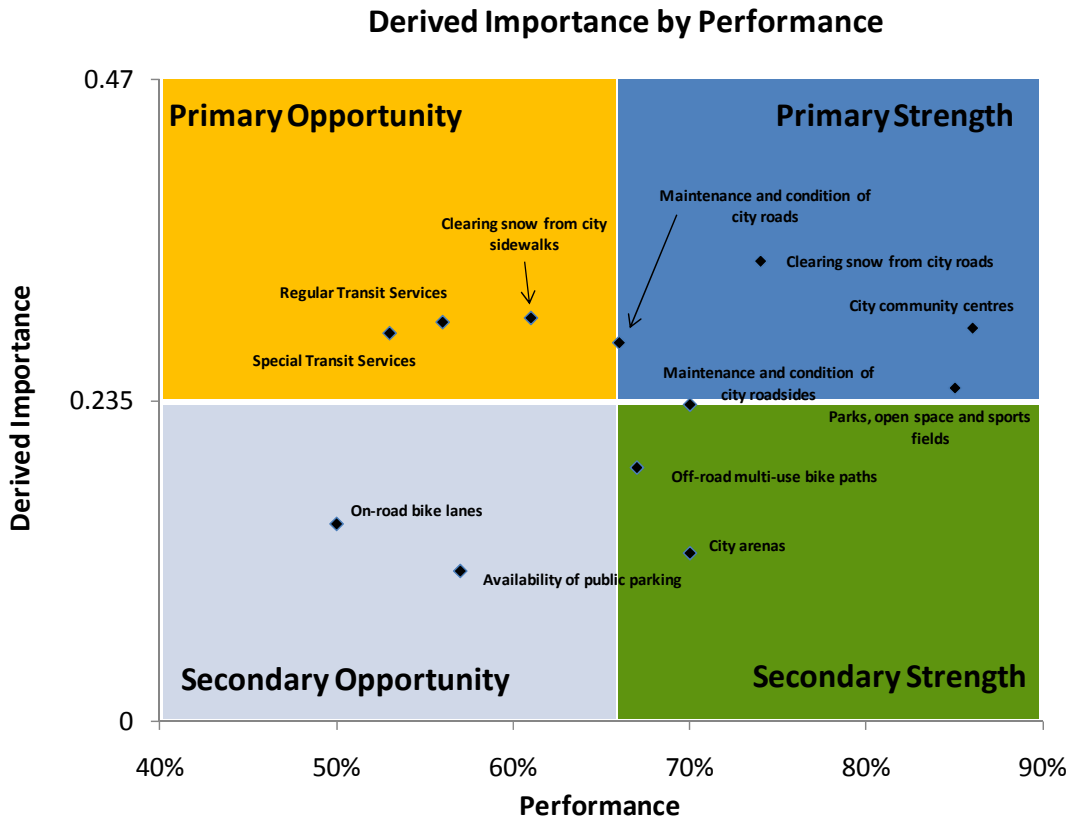
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Crossing Derived Importance and Stated Importance reveals some interesting differences. Transit (Regular and Special) is seen as a Latent Motivator, meaning that it is statistically very important but consciously in the mind of respondents not very important. Conversely, availability of public parking is a top of mind need, but statistically not a key driver of satisfaction.

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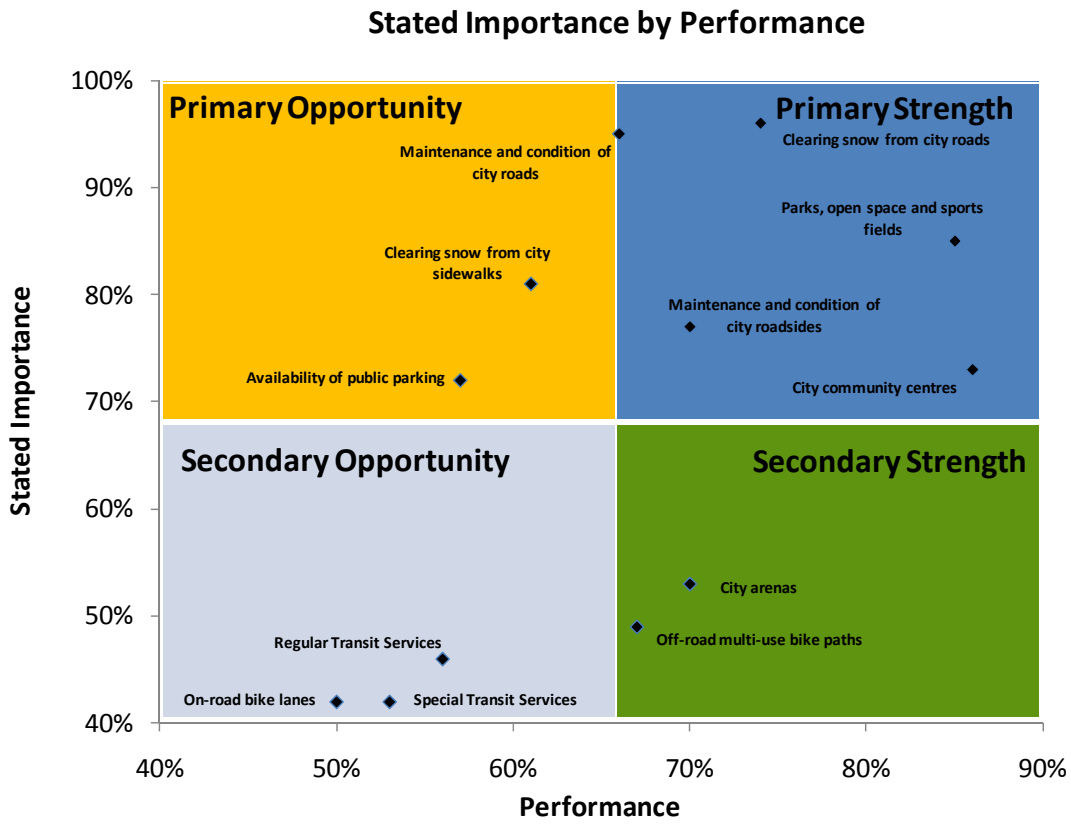
Derived Importance



Assuming that derived importance is a more reliable measure, and plotted against performance, Special Transit, Regular Transit and Clearing Snow from City Sidewalks are the three main priorities areas for improvement for 2011.

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Stated Importance



Using stated importance as the more reliable measure, however, reveals that Maintenance and Condition of City Roads, Clearing Snow for City Sidewalks, and Availability of Public Parking emerge as the three main priorities areas for 2011.

FRG would advocate using derived importance as the more reliable measure of importance and would focus on improving Special Transit, Regular Transit and Clearing Snow from city Sidewalks.

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Service Satisfaction: Users vs. Non-users*

FRG recommended asking users and non-users of services to state their satisfaction with these services. Although difficult for a few respondents to understand, and at times leading to frustration, it is important that all tax payers be given the opportunity to at least express their satisfaction with a service or program even if they haven't used it.

The rationale is as follows: Non-users of a library may not be satisfied with the location or hours of operation which actually prevents them from using the library. Non-users of libraries may be satisfied with the number of libraries, even though they don't use them, because it helps to create a better community and society and increase property values.

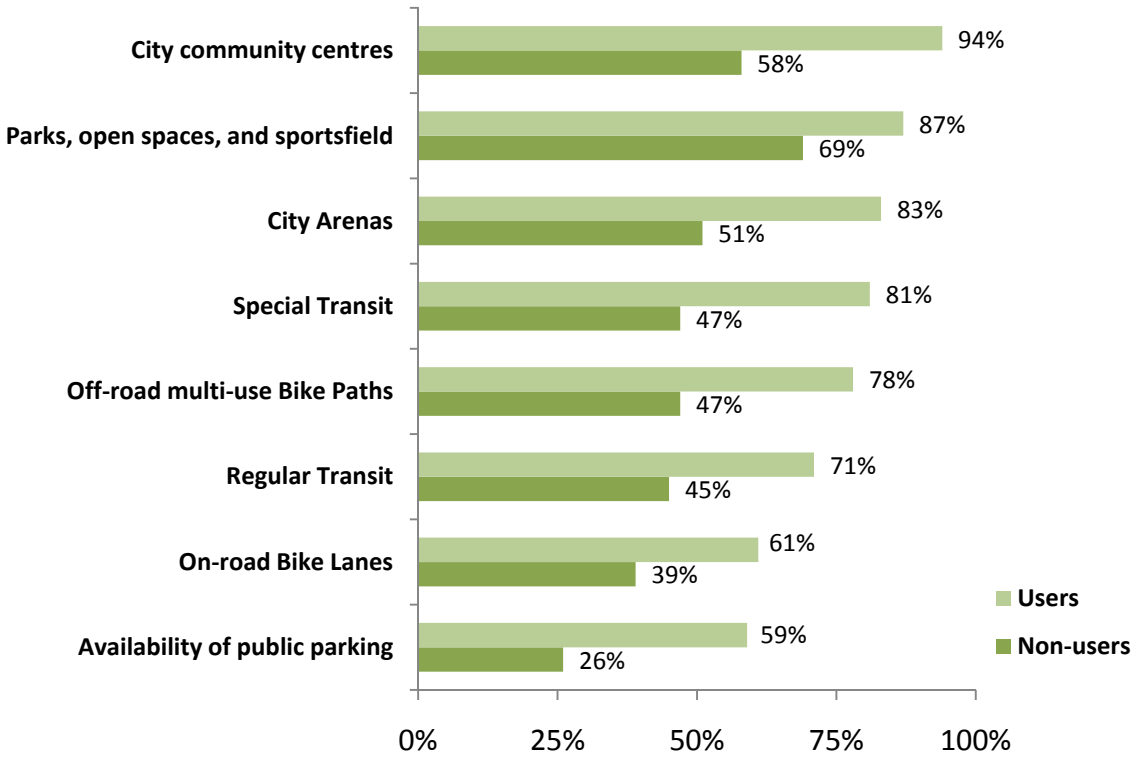
Non-users of a transit may have looked into bus schedules and decided to take a taxi when their car is in the shop due to the location of stops, number of transfers, or length of commute. In this sense, they may not be satisfied with the transit service provided.

Non-users of bike lanes may not use them because they are not satisfied with how wide they are, the fact that they just seem to end, or are not properly maintained. They can determine this from their car or by looking at a route map and decide not to use them. Similarly car drivers may find them an annoyance and waste of tax payer dollars.

We can give examples of how non-users can be satisfied or dissatisfied with the service so let's move on to see if users and non-users are different and why.

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The following is a summary of city service satisfaction levels by service users and non-users.



***Top 2 box scores shown (Excellent, Good)**

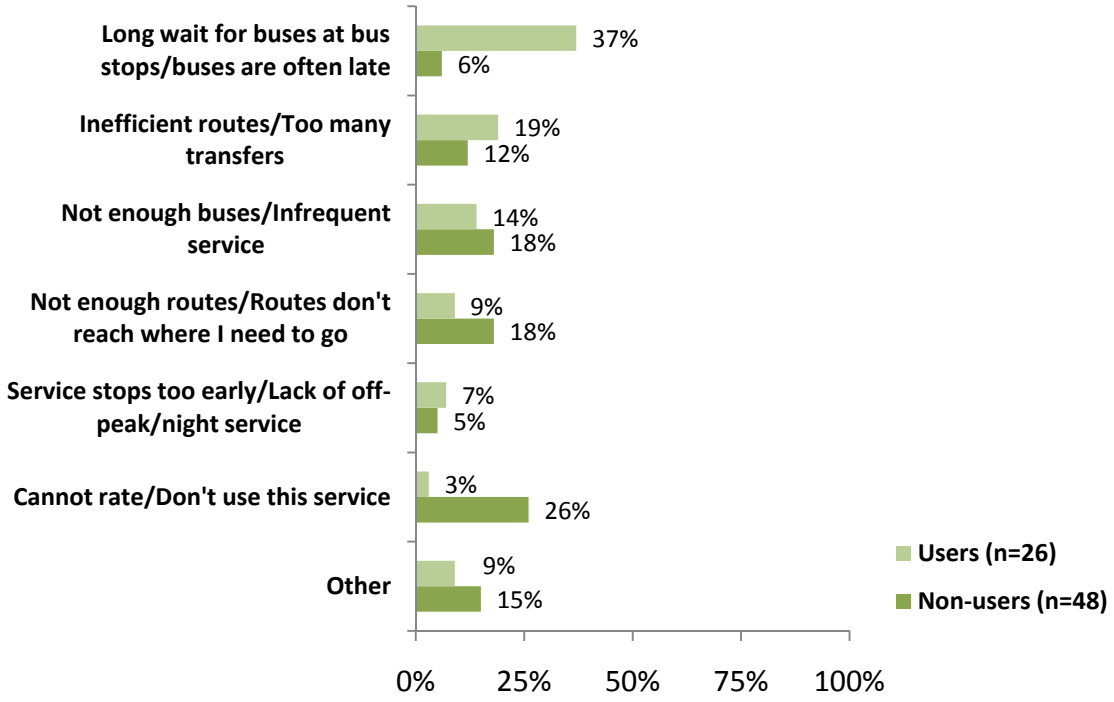
As evidenced by the exhibit above, users of City of Burlington services are consistently more satisfied with the provision of services when compared to those who do not make use of the services. Of note is the smaller performance gap between users and non-users for satisfaction with parks, open spaces, and sports fields which suggests service awareness may correlate to perceived performance / satisfaction as regardless of use, parks, open spaces, and sports fields are visible aspects of any community and as such residents will generally have a higher awareness of their presence. Also, reasons provided for dissatisfaction amongst non-users may reveal barriers to usage.

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*Reasons for Service Dissatisfaction: Users vs. Non-users**

The following is a summary of city service reasons for dissatisfaction by service users and non-users. Only services with sufficient sample for analysis are presented.

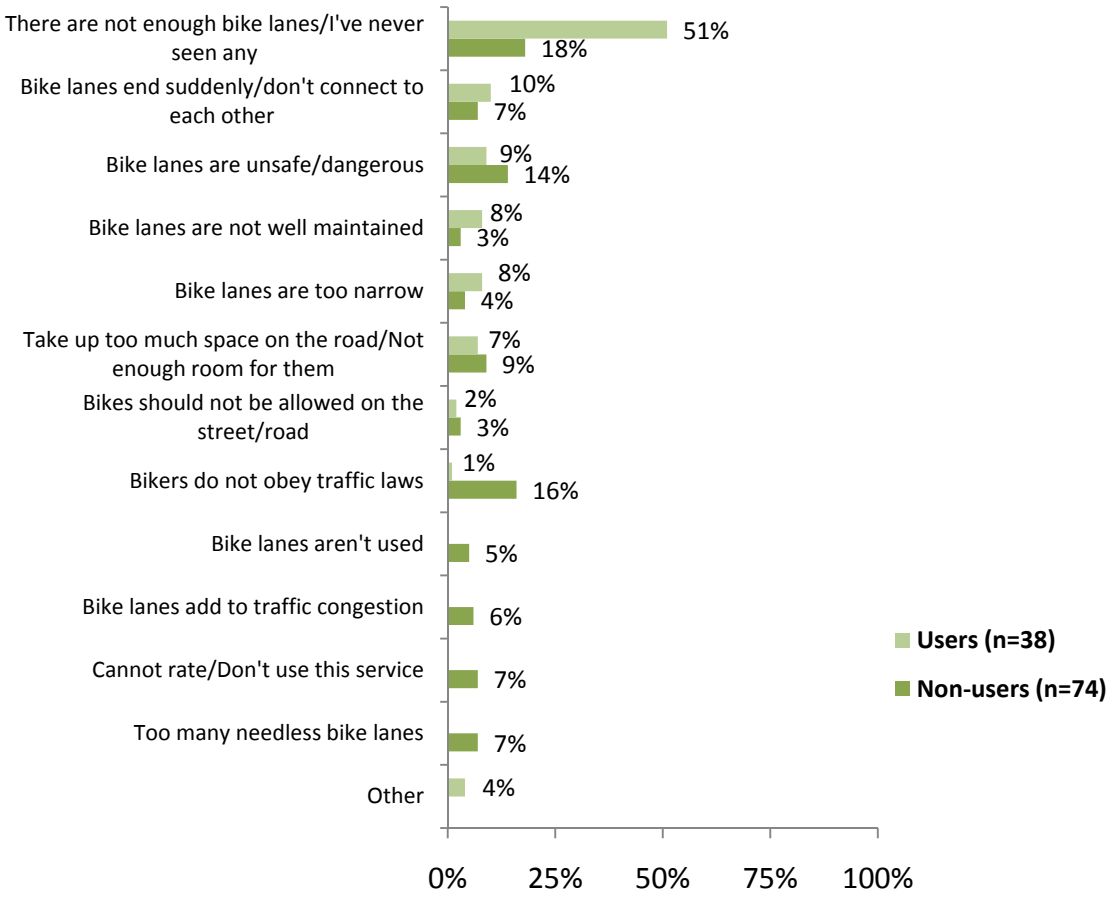
Regular Transit



Users of Regular Transit were most likely to cite long wait times at bus stops / late buses as a prime reason for service dissatisfaction (37%) whereas those residents who do not use the service were most likely to cite a lack of buses / infrequent services, or a lack or routes / routes don't reach where needed (18% each).

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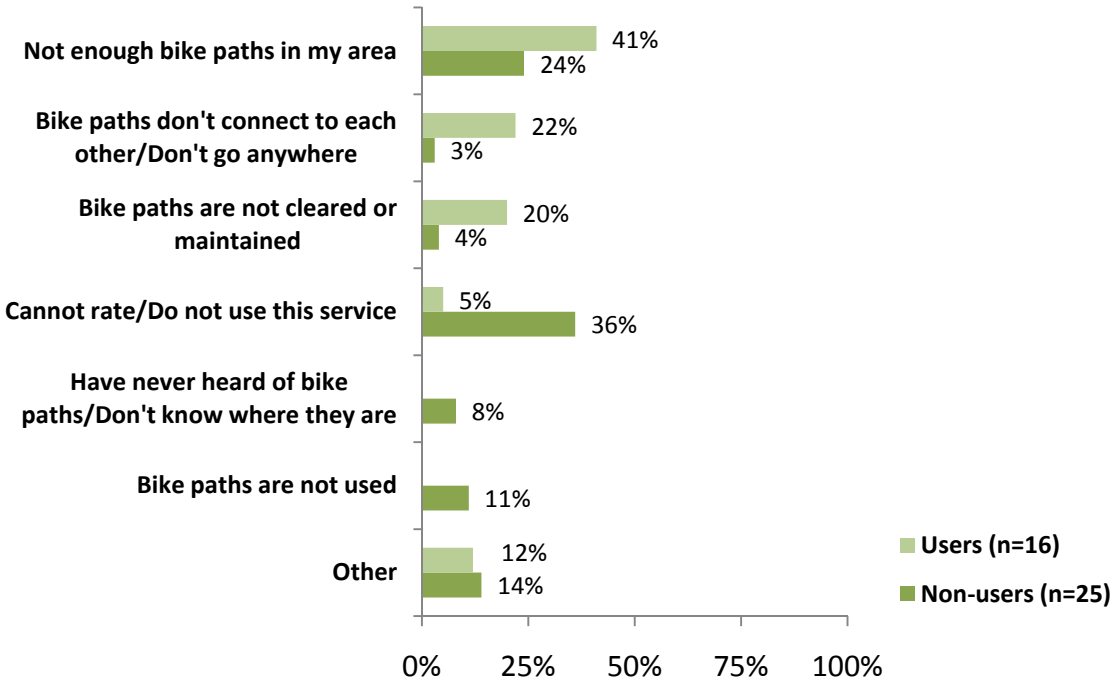
On-road Bike Lanes



The majority of On-road Bike Lane users cite a lack of bike lanes as their main reason for dissatisfaction with the City of Burlington's provision of On-road Bike Lane services, whereas non-users were more likely to cite a bevy of reasons related to perceived bicycle hazards, nuisances, and traffic law violations as a reason for dissatisfaction with On-road Bike Lanes.

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Off-road Bike Lanes



Most users of Off-road Bike Lanes were dissatisfied with the lack of bike paths in their area (41%) while non-users were more concerned with bike paths not being used (11%) or a lack of awareness of bike paths (8%).

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