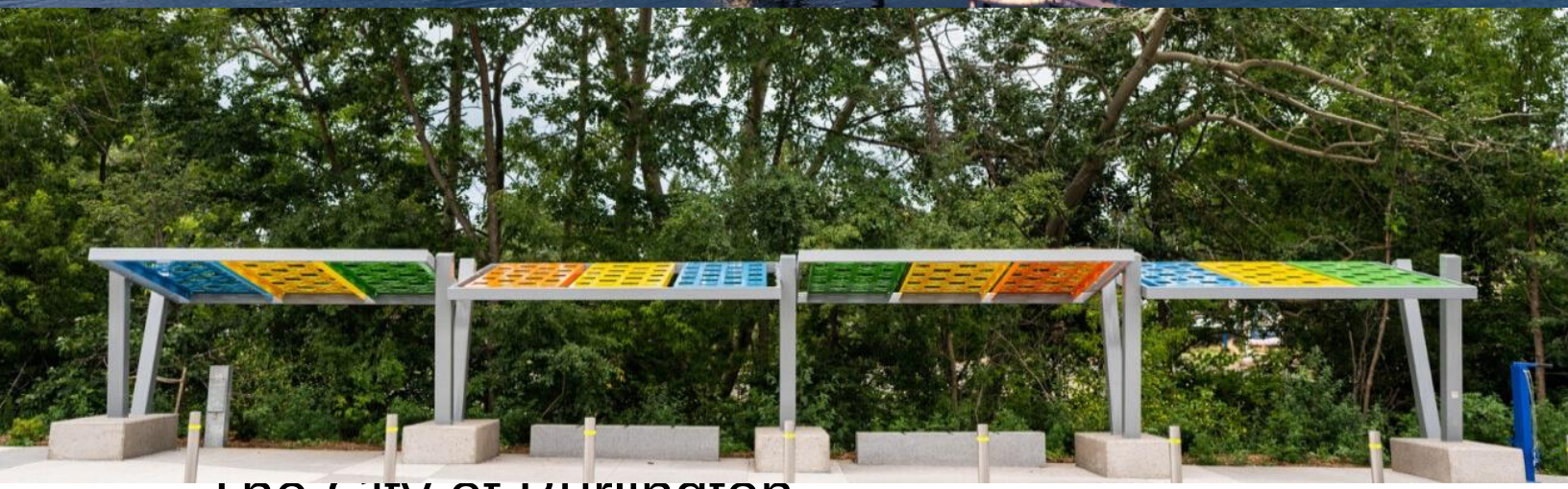






The City of Burlington Community Survey 2023

DRAFT Report

December 2023

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Executive Summary

This report outlines the results from the 2023 City of Burlington Community Survey. Between September and October of 2023, 784 residents of the City of Burlington were surveyed about their opinions on municipal matters using a scientific methodology via Computer-Assisted-Telephone Interviewing. Overall, the results showed highly positive views of the city among residents, despite some lower scores in comparison to previous years.

Among all the residents surveyed, 79% rated Burlington as either an "Excellent" or "Very Good" place to live, which is a positive score; however, down by 10 percentage points relative to. 92% of residents were somewhat satisfied to very satisfied with the services provided by the City of Burlington. Almost all residents were satisfied with fire services (98%) and parks, sports fields and trails (97%). However, the areas with the most room for improvement in residents scores were related to council (76%), by-law enforcement (78%), and transit services (78%), all of which received the lowest satisfaction rates among residents. The majority of residents surveyed (81%) were somewhat to very satisfied with their most recent interaction with the City.

Using Deloitte's proprietary derived importance methodology, several top priority areas relating to Municipal services were identified. These top priorities include council, transit service, by-law enforcement, and roadway and sidewalk maintenance. The report comprises an analysis of various other questions that measure the perceptions of residents regarding the local transit options and Municipal communications/engagement. Additionally, the satisfaction with services is analyzed by Municipal ward to identify any regional disparities that may exist.

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Background

In their ongoing commitment to offer the highest quality services possible, the City of Burlington commissioned a study to gauge resident perceptions of their Municipal services, engagement, and communication efforts. This report outlines the findings of the biennial Community Survey that was conducted amongst the general population in the City of Burlington in 2023.

PURPOSE

The City of Burlington regularly conducts a Community Survey to uncover resident satisfaction, engagement, and communication levels. The surveys were conducted in 2008, 2011, 2015, 2019, 2021, and most recent in 2023. In 2019, it was decided that the survey would be conducted biennially. Along with evaluating the quality of life and resident satisfaction, each survey includes targeted questions related to policies that are of utmost importance to the City of Burlington. In 2023, the City was interested in learning more about how connected residents feel to their neighbours. The survey included benchmarking questions from previous studies to track the progress of community measures over time, aiming for continuous improvement in resident well-being and satisfaction.

SAMPLING METHODS

The survey data was collected using Computer Assisted Telephone Interviews (CATI). Phone numbers were randomly dialled from a sample of landlines and cell phone numbers across the six Municipal wards. This sampling strategy ensured a representative sample, eliminating potential bias which could occur if residents were left to opt-in to the survey by themselves. Calls were made between 5:00 pm and 8:30 pm from September 25th to October 7th, 2023. The interviews took an average of 15 minutes. The survey had a high success rate, which lead to a total of 784 completed interviews over the survey period (approximately 125 responses per ward). The margin of error for the study was calculated at +/- 3.5% using a 95% confidence interval.

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Detailed Findings

OVERALL SATISFACTION

Q1. To start off, how would you rate Burlington as a place to live?

Residents were asked to rate the overall quality of life in the City of Burlington. The majority of residents (79%) rated the City of Burlington as a "Very Good" or "Excellent" place to live, which has decreased notably since 2021 (-10%). Table 1 shows the progression of the quality-of-life rating over the last 15 years.

FIGURE 1: RATING OF BURLINGTON AS A PLACE TO LIVE (N=784)

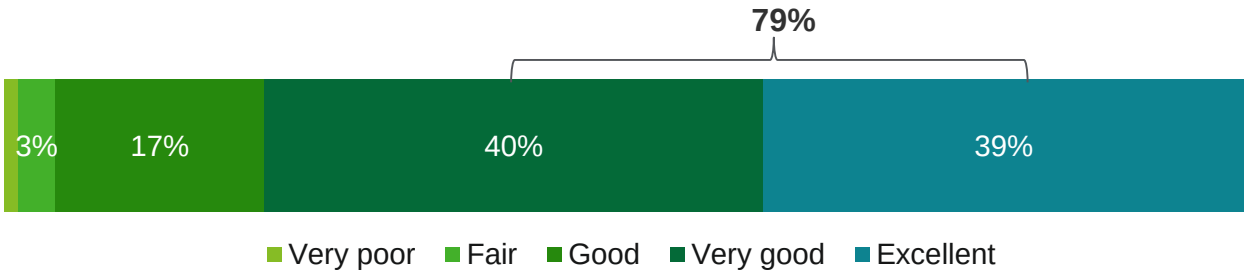


TABLE 1: RATING OF BURLINGTON AS A PLACE TO LIVE BENCHMARKING

Benchmarking	2008	2011	2015	2019	2021	2023
Top 2 Box (Excellent/ Very good)	86%	87%	86%	87%	89%	79%
Number of Responses	750	752	771	757	755	784

Additional analysis was conducted to compare residents' ratings of the city and a place to live based on their housing types. Respondents who lived in condos gave higher ratings of Burlington as a place to live, in comparison to those with other housing types.

Top Two	Single, detached house	Duplex or row townhouse	Apartment style	Condo
Top Two Box (Very good and Excellent)	77%	85%	71%	91%

Q2. Using one or two words, what would you say you like best about living in Burlington?

The words that were used most often by community members to describe the best thing about living in the city are shown below, with the words sized in proportion to the number of mentions. Respondents frequently mentioned the community, safety, and cleanliness.

FIGURE 2: WORDS USED TO DESCRIBE LIVING IN THE CITY (N=784)



MUNICIPAL SERVICES

Q3. Generally speaking, how satisfied are you with the overall quality of services provided by the City of Burlington? Would you say you are …?

92% of residents were "Somewhat satisfied" to "Very satisfied" with the services provided by the City ofs. This satisfaction rate was not a statistically significant change from 2021.

FIGURE 3: OVERALL SERVICE SATISFACTION (N=774)

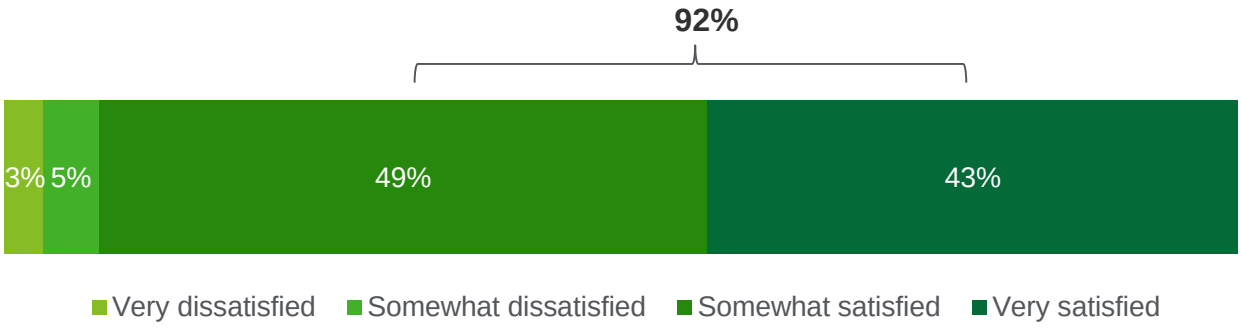


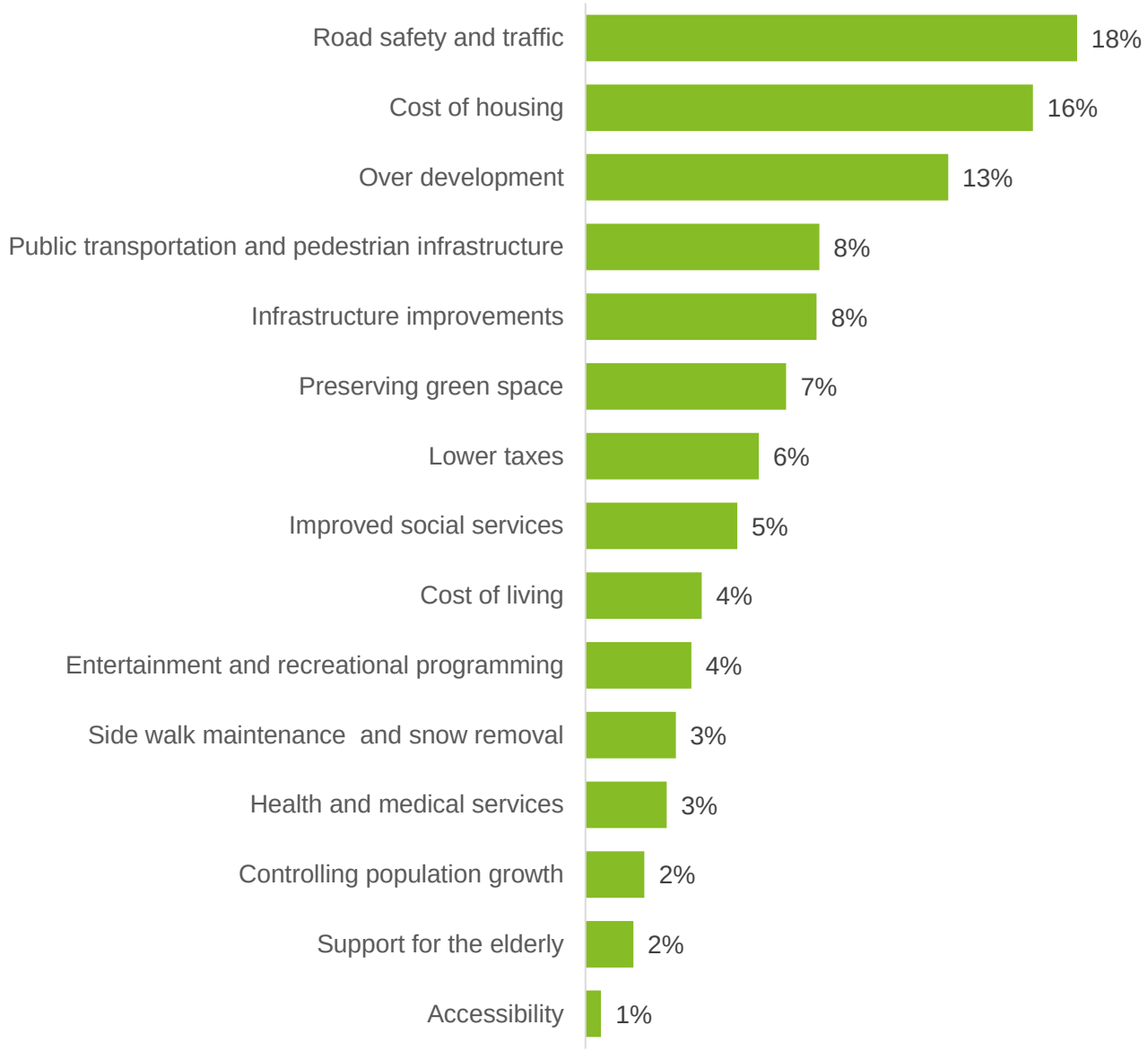
TABLE 2: OVERALL SATISFACTION BENCHMARKING

Benchmarking	2008	2011	2015	2019	2021	2023
Top 2 Box (Somewhat to Very satisfied)	95%	95%	89%	93%	95%	92%
Number of Responses	750	752	771	757	755	774

Q4. In one sentence, what is the one issue you feel should receive the greatest attention from your Mayor and members of City Council?

Residents most commonly mentioned that road safety (18%) and cost of housing (16%) are issues that should receive the greatest attention from the Mayor and members of City Council.

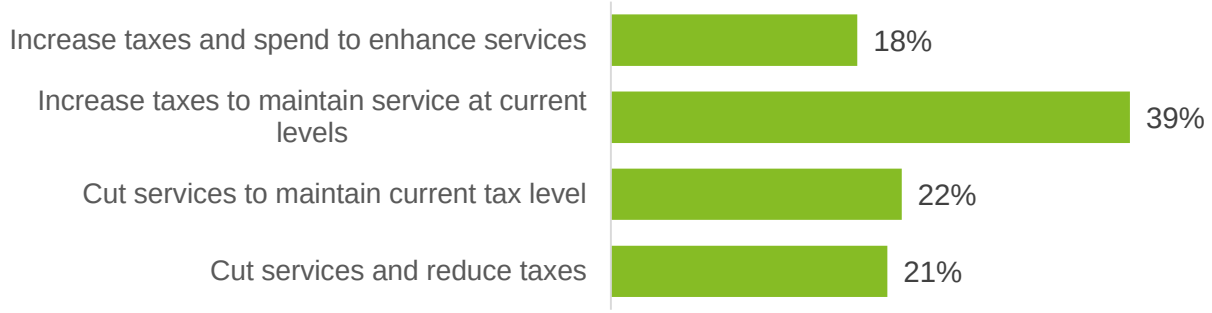
FIGURE 4: ISSUES THAT SHOULD RECIEVE ATTENTION FROM MAYOR AND COUNCIL (N=664)



Q5. Municipal property taxes are the primary way to pay for services and programs provided by the City. Which of the following four options would you prefer the City to pursue?

18% of respondents reported a preference for increasing taxes and improve services. 39% of respondents would be in favour of a tax increase to maintain service at current levels. The responses together demonstrate that overall, 57% of residents would support an increase in taxes to, at minimum, maintain the current service levels. It is worth noting that in 2021, the percentage of residents who preferred a tax increase was higher, with 71% indicating their support for a tax increase to maintain the current service levels.

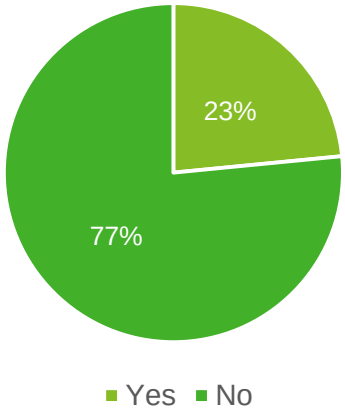
FIGURE 5: TAX CHANGE PREFERECE (N=668)



Q6. Have you used Burlington Transit in the past 6 months?

77% of respondents have not used Burlington Transit in the past 6 months.

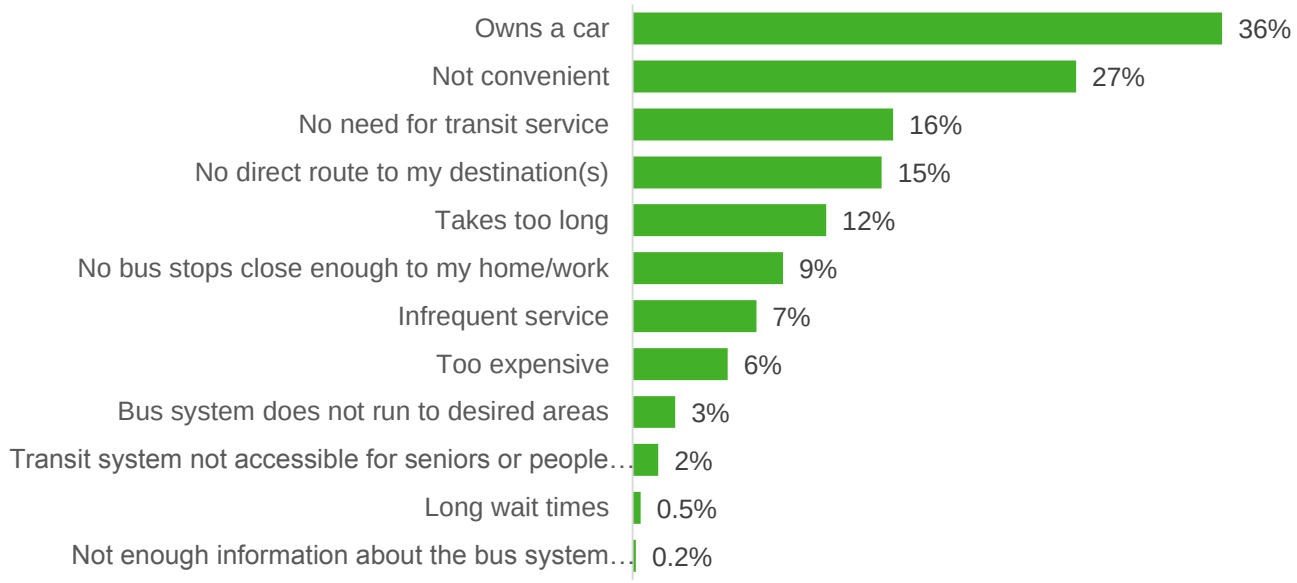
FIGURE 6: BURLINGTON TRANSIT USAGE (N=782)



Q6A. Which factors do you feel prevent you from using Burlington Transit?

Respondents who had not used Burlington Transit in the past 6 months were also asked about the factors that they felt prevented them from using the service. Residents who have not used the transit system most commonly sited factors including owning a car (36%) or it was generally not convenient (27%).

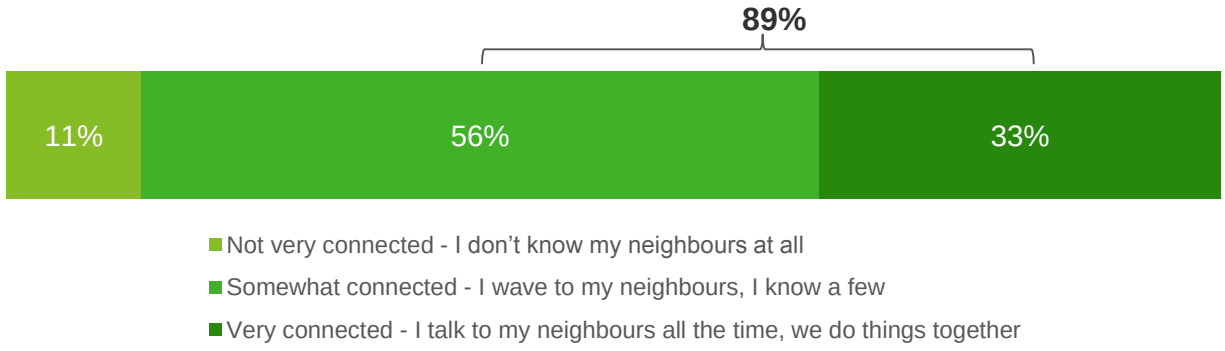
FIGURE 7: REASONS FOR NOT USING BURLINGTON TRANSIT (N=651)



Q7. How connected do you feel to your neighbourhood community?

89% of respondents felt "Somewhat connected" to "Very connected" to their neighbours, with 11% feeling not very connected.

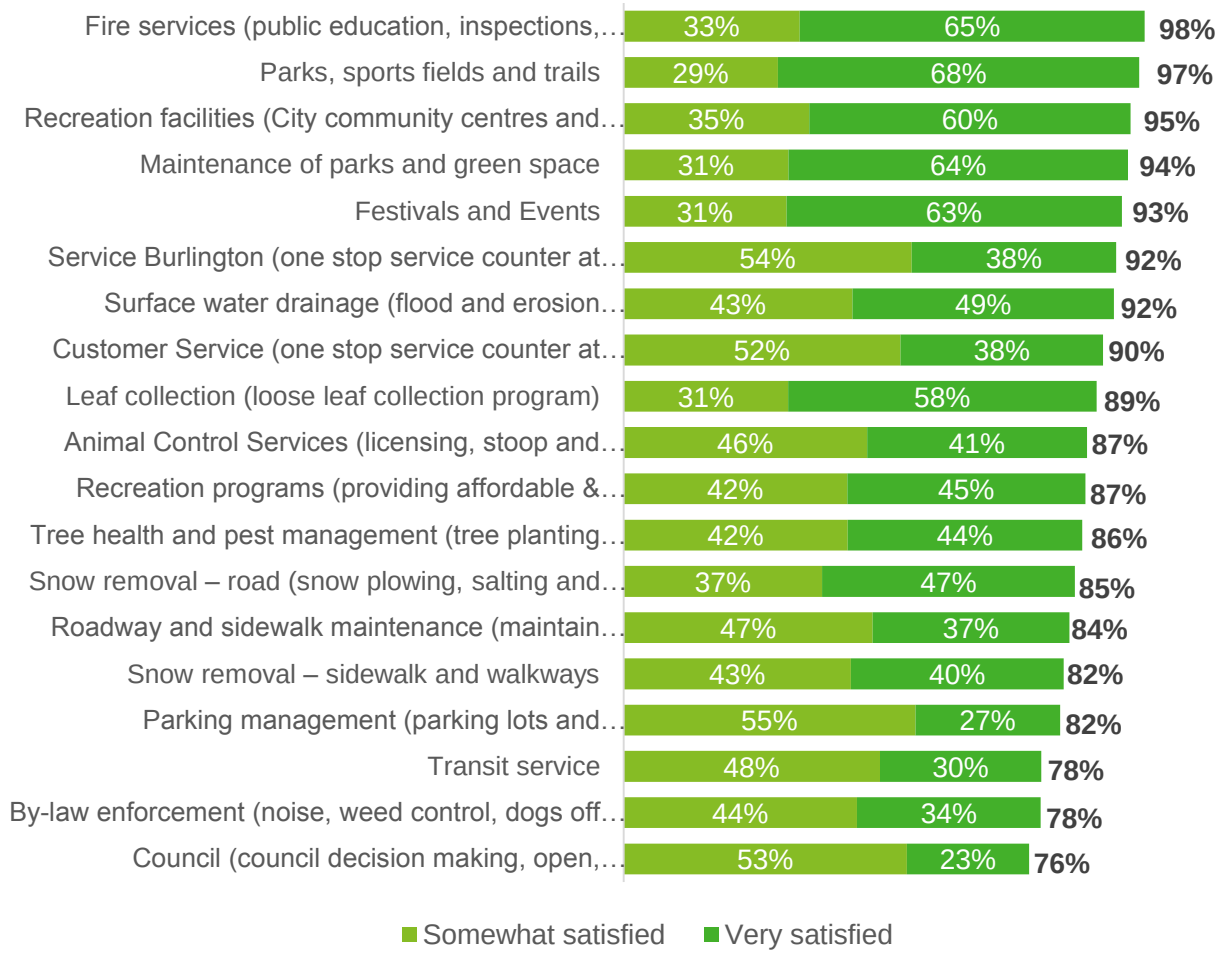
FIGURE 8: CONNECTEDNESS TO NEIGHBOURHOOD COMMUNITY (N=784)



Q8. To the best of your ability, please rate your level of satisfaction with the following services by indicating whether you are Very Satisfied, Somewhat Satisfied, Somewhat Dissatisfied or Very Dissatisfied.

Almost all residents were at least "Spmewhat satisfied" with fire services (98%) and parks, sports fields, and trails (97%). The areas with the lowest satisfaction and highest area for improvement include council (76%), by-law enforcement (78%), and transit services (78%).

FIGURE 9: SATISFACTION WITH SERVICES (N=784)



The satisfaction rates for the municipal services in Figure 10 are also shown in Table 3, with the percentage point change from the 2021 and 2019 Community Surveys in the columns to the right. This table highlights the municipal services which saw an increase (in green) and decrease (in red) in residents' satisfaction rates respectively. The "Performance (Top 2 Box)" reflects the proportion of individuals who were either "Very satisfied" or "Somewhat satisfied" with the service.

TABLE 3: SERVICE SATISFACTION BENCHMARKING

Service	Performance (Top 2 Box)	Change from 2021 (percentage points)	Change from 2019 (percentage points)
Fire services	98%	-	-
Parks, sports fields and trails	97%	-	+1 pt
Recreation facilities	95%	+2 pts	-3 pts
Maintenance of parks and green space	94%	-	-3 pts
Festivals and Events	93%	-1 pts	-3 pts
Service Burlington	92%	-2 pts	NA
Surface water drainage	92%	+2 pts	-2 pts
Customer Service	90%	-1 pts	-3 pts
Leaf collection	89%	+3 pts	+9 pts
Animal Control Services	87%	+1 pt	+1 pt
Recreation programs	87%	-4 pts	-7 pts
Tree health and pest management	86%	+1 pt	+8 pts
Snow removal – road	85%	-2 pts	+6 pts
Roadway and sidewalk maintenance	84%	-3 pts	-2 pts
Snow removal – sidewalk and walkways	82%	-	+1 pt
Parking management	82%	+3 pts	+9 pts
Transit service	78%	-5 pts	+10 pts
By-law enforcement	78%	-3 pts	-5 pts
Council	76%	-8 pts	-2 pts

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Derived Importance & Priority Matrix

Using community members' ratings of services provided by the City of Burlington as well as their overall satisfaction with the City's services, a priority matrix was created using Deloitte's proprietary derived importance methodology. The Priority Matrix consists of three metrics:

- **Level of Importance:** Statistical correlations were used to determine the strength of the relationship between the attribute and overall satisfaction with the service. Attributes with a high importance tend to matter greatly for individual's overall satisfaction.
- **Performance:** The percentage of respondents who were somewhat or very satisfied with the service.
- **Priority rank:** This was determined for each attribute based on high levels of importance and low levels of performance. Top priorities are attributes where many respondents aren't currently satisfied, and where there is potential to greatly improve their overall satisfaction.

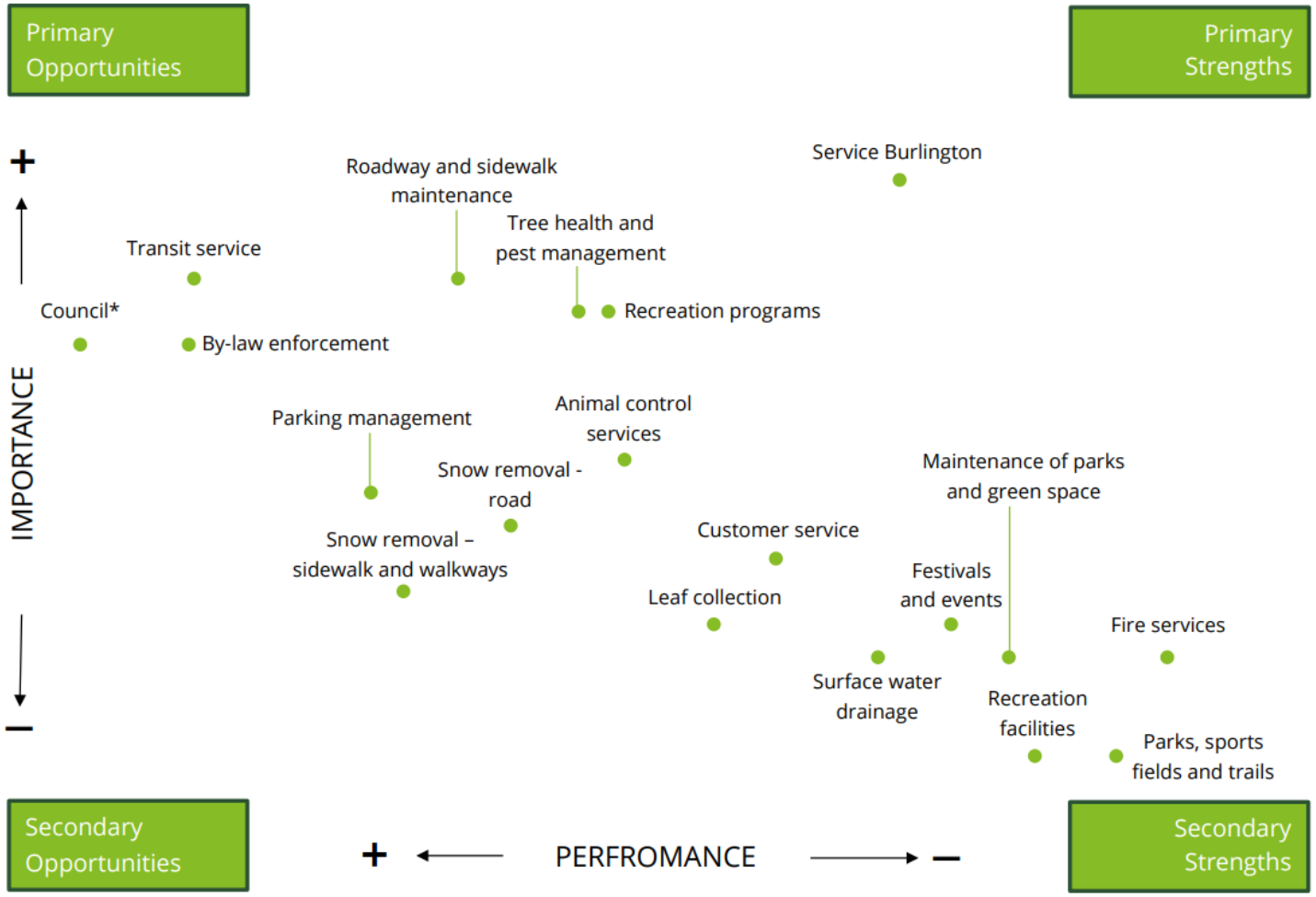
The top priority factors include council (council decision making, open, accountable, transparent local government), transit service, and by-law enforcement. The City of Burlington should focus on these areas when making improvements to the city, to best meet the needs of community members.

Service	Importance	Performance	2023 Priority Ranking	2021 Priority Ranking
Council	8.4	76%	1	5
Transit service	8.8	78%	2	3
By-law enforcement	8.4	78%	3	2
Roadway and sidewalk maintenance	8.8	84%	4	9
Parking management	7.5	82%	5	1
Snow removal – sidewalk and walkways	6.9	82%	6	4
Tree health and pest management	8.6	86%	7	6
Recreation programs	8.6	87%	8	13
Snow removal – road	7.3	85%	9	10
Animal Control Services	7.7	87%	10	7
Leaf collection	6.7	89%	11	8
Service Burlington	9.4	92%	12	16
Customer Service	7.1	90%	13	11
Surface water drainage	6.5	92%	14	12
Festivals and Events	6.7	93%	15	18
Maintenance of parks and green space	6.5	94%	16	17
Recreation facilities	5.9	95%	17	15
Parks, sports fields and trails	5.9	97%	18	19
Fire services	6.5	98%	19	20

*****"Covid-19 Response" was removed from the 2023 factors list resulting in a total of 19 priorities this year.*

To demonstrate the trade-off between the importance of services and the level of performance, we use a quadrant analysis (Figure 11). In this Figure, services with a high level of importance are considered primary strengths and weaknesses as these are the services with the most opportunity to impact residents' perceptions and well-being. In Figure 11, the services which were ranked as high priority areas tend to be in the bottom right corner, and the key strengths are in the top right corner.

FIGURE 10: QUADRANT ANALYSIS OF STRENGTHS, OPPORTUNITIES AND PRIORITIES IDENTIFIED IN MUNICIPAL SERVICES

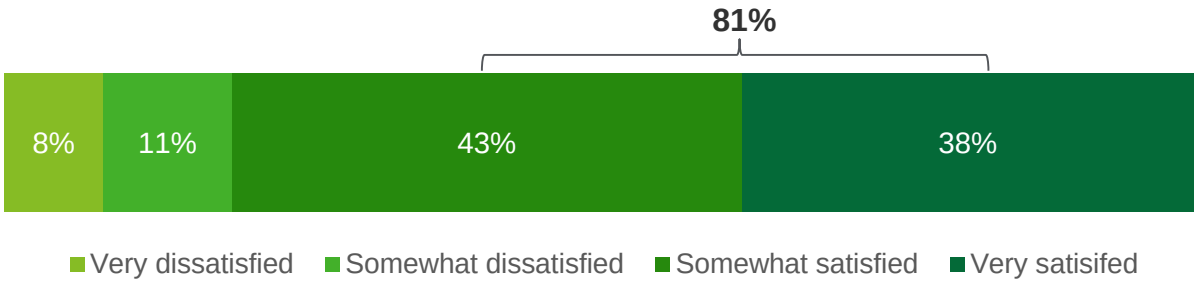


**Council refers to "council decision making & open, accountable, transparent local government"*

Q9. How satisfied were you with your most recent experience/interaction with the City?

81% of respondents were at least "Somewhat satisfied" with their most recent interaction with the City, which was a non-significant decrease from 2021 by 1 percentage point.

FIGURE 11: SATISFACTION WITH INTERACTION WITH CITY (N=646)



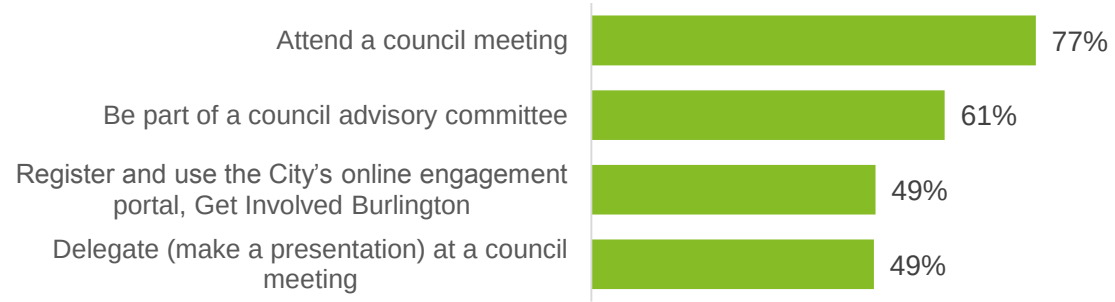
Benchmarking	2019	2021	2023
Top 2 Box (Somewhat to Very Satisfied)	85%	82%	81%

RESIDENT ENGAGMENT

Q10. Are you aware that residents can do the following…

Residents were least aware that they could delegate at a council meeting (49%) and register/use Get Involved Burlington (49%). There has been steady growth in the awareness of the City's online engagement portal since 2019.

FIGURE 12: RESIDENT AWARENESS (N=784)



Service	2023	Change from 2021 (percentage points)	Change from 2019 (percentage points)
Attend a council meeting	77%	-12 pts	-8 pts
Be part of a council advisory committee	61%	-5 pts	-4 pts
Register and use Get Involved Burlington	49%	+5 pts	+8 pts
Delegate at a council meeting	49%	-20 pts	-18 pts

Q11. I am going to read several statements to you, please tell me the level to which you agree or disagree with them.

80% of residents at least "Somewhat agreed" that they would like to provide input to the City for the purpose of influencing decision-making about city projects and services. In comparison to 2021, respondents' agreement that the city does a good job of engaging residents and welcomes residents' opinions in decision making has decreased (-12% and -10% respectively).

FIGURE 13: AGREEMENT LEVELS (N=784)

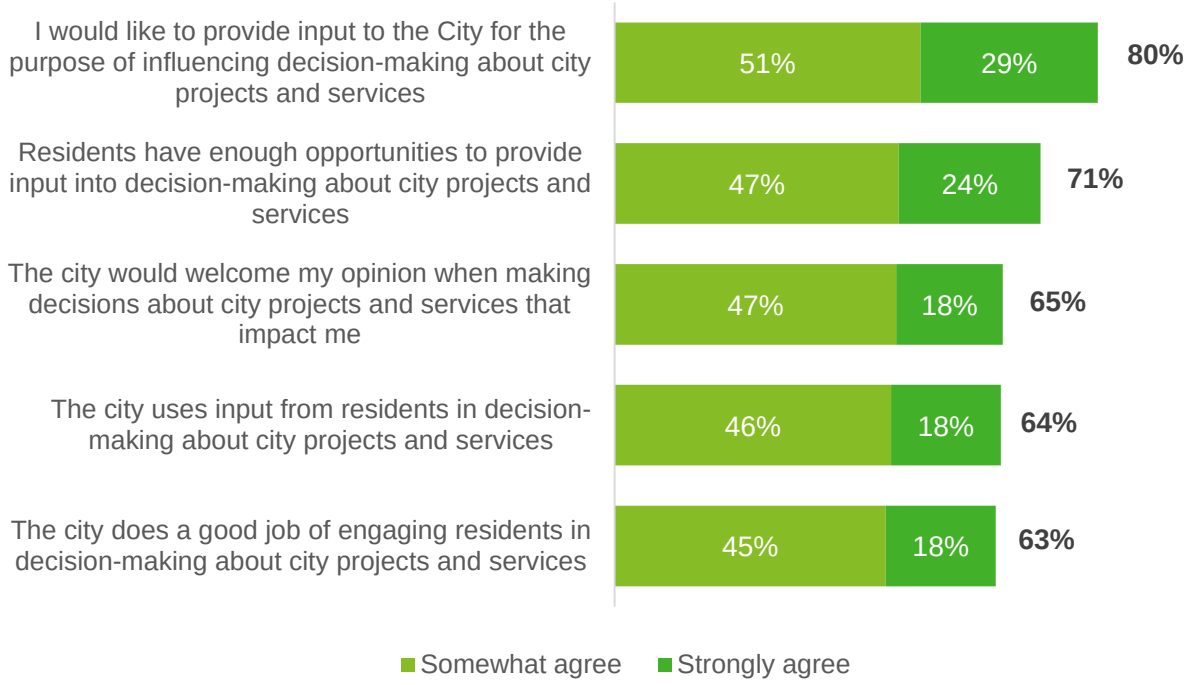


TABLE 4: AGREEMENT LEVELS BENCHMARKING

Attribute	Top 2 Box			
	2015	2019	2021	2023
I would like to provide input to the City for the purpose of influencing decision-making about city projects and services	63%	76%	80%	80%
Residents have enough opportunities to provide input into decision-making about city projects and services	64%	77%	79%	71%
The city would welcome my opinion when making decisions about city projects and services that impact me	57%	71%	75%	65%
The city uses input from residents in decision-making about city projects and services	50%	70%	71%	64%
The city does a good job of engaging residents in decision-making about city projects and services	54%	71%	75%	63%

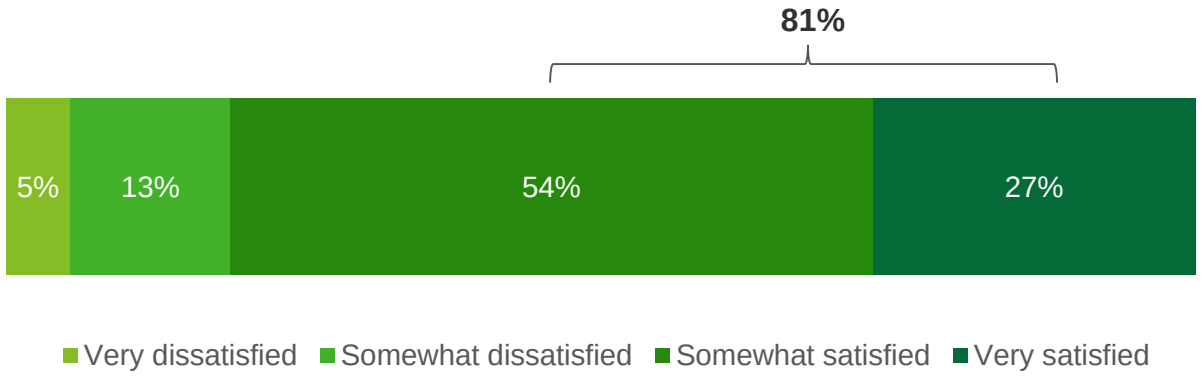
COMMUNICATION

Q12. How satisfied are you with the overall quality of City information and communications?

81% of respondents were at least "Somewhat satisfied" with the overall quality of City information and communications, with 5% of respondents being "Very dissatisfied".

2021 Comparison
Top 2: 89%

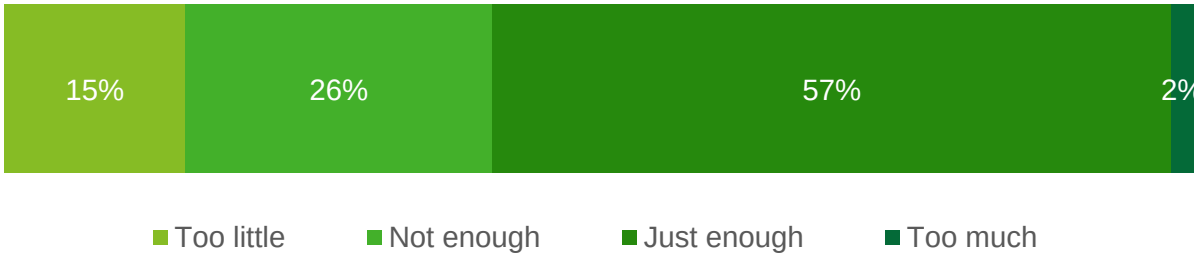
FIGURE 14: SATISFACTION WITH CITY COMMUNICATIONS (N=764)



Q13. In your opinion, please rate the amount of information you receive from the City of Burlington?

57% of respondents indicated they receive "Just enough" information from the City, and 41% of respondents reported that they receive "Too little" or "Not enough".

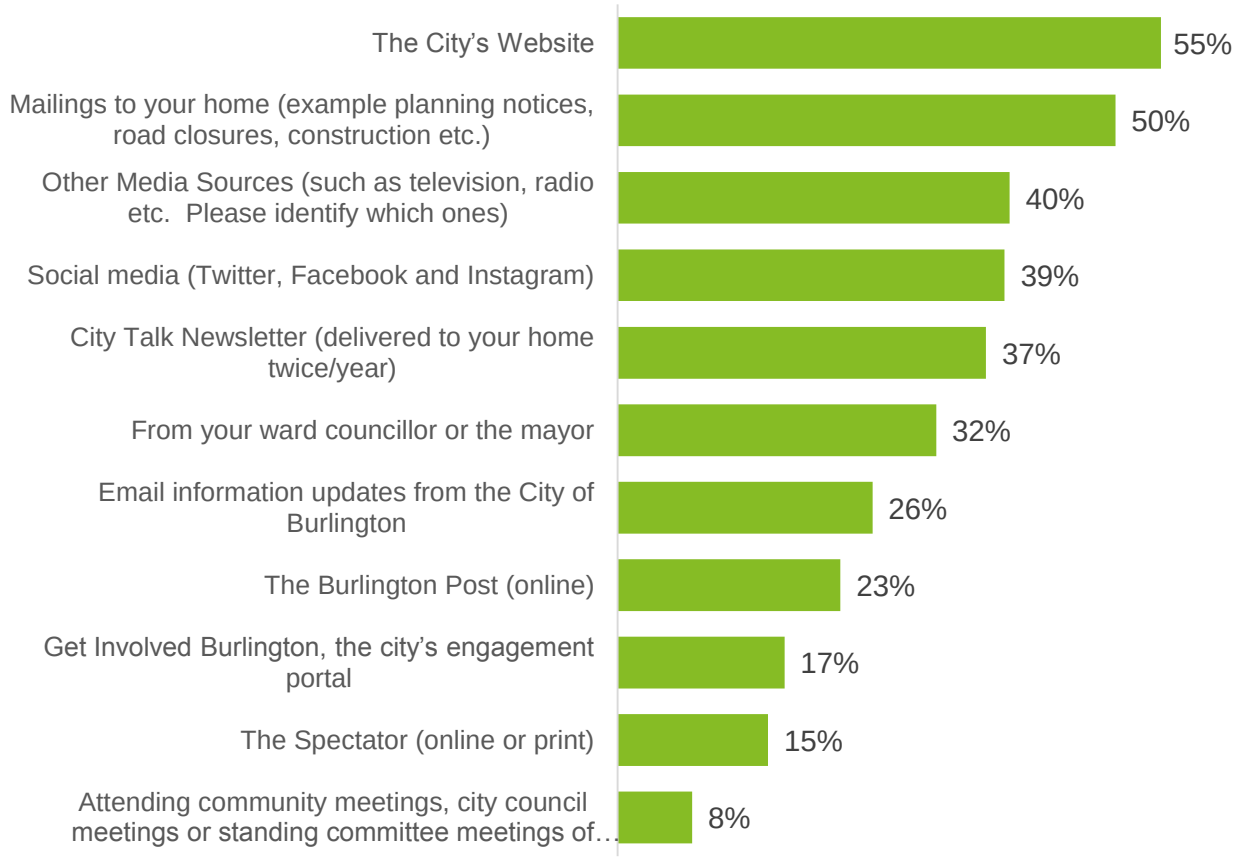
2021 Comparison
"Just Enough": 70%



Q14. Which of the following sources do you currently use to find out about City programs, services and initiatives?

Most respondents use the City's website (55%) or mailings to their home (50%) to find out about City programs, services and initiatives. Attending community meetings, city council meetings, or standing committee meetings of council and The Spectator were the two least often used sources.

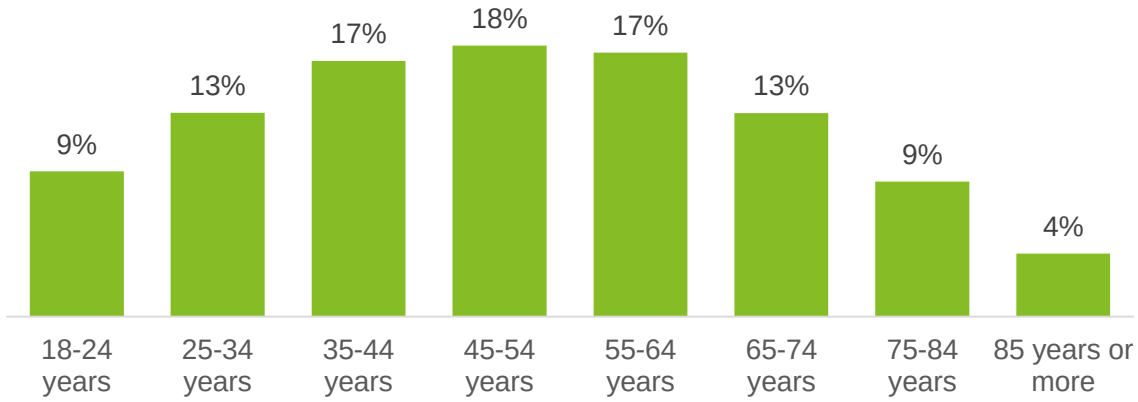
FIGURE 15: SOURCES OF INFORMATION USED (N=784)



DEMOGRAPHICS

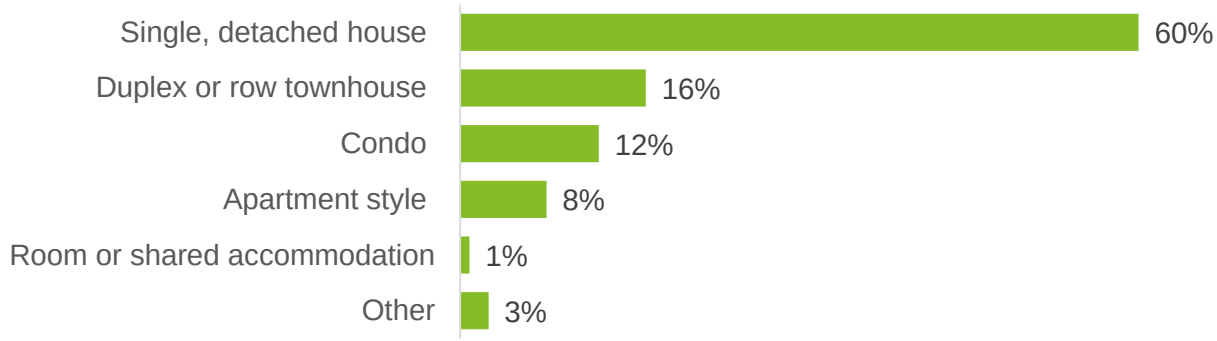
Q15. Can you please tell me which of the following age groups you are in?

FIGURE 16: AGE (WEIGHED BY 2021 CENSUS DATA, N=784)



Q16. What type of home do you live in?

FIGURE 17: TYPE OF HOME (N=784)



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SERVICE SATISFACTION BY MUNICIPAL WARD

An Analysis of the proportion of respondents who rated their level of satisfaction with various city services as Very or Somewhat satisfied (top 2 box responses) was conducted to compare differences between the 6 wards in Burlington (Table 5). For these purposes, statistical tests were used to see which differences are most likely to be true population differences, rather than random error. The top 2 box proportion in each ward was tested for differences from the overall proportion in the sample for a given question. Statistically significant differences are highlighted in green (for higher values) and red (for lower values) in Table 5 for wards that have proportions significantly different than the average of the full sample.

TABLE 5: OVERALL SERVICE SATISFACTION BY MUNICIPAL WARD

Service	Ward (Top 2 Box)					
	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6
Fire Services	99%	97%	90% ↓	99%	100%	99%
Animal Control Services	86%	85%	91%	81%	89%	90%
By-law enforcement	78%	68%	85%	80%	79%	79%
Roadway and sidewalk maintenance	79%	89%	86%	82%	83%	83%
Maintenance of parks and green space	90%	97%	98%	90%	96%	97%
Snow removal – road	84%	90%	79%	85%	78%	91%
Snow removal – sidewalk and walkways	84%	85%	84%	77%	78%	87%
Tree health and pest management	88%	90%	87%	75%	89%	89%
Leaf collection	78%	95%	88%	91%	84%	96%
Surface water drainage	94%	92%	92%	88%	91%	96%
Transit service	72%	67%	83%	86%	86%	73%
Parking management	83%	74%	80%	87%	82%	82%
Recreation programs	82%	80%	93%	90%	85%	89%
Festivals and Events	88%	93%	96%	97%	97%	88%
Parks, sports fields and trails	88%	99%	95%	99%	100% ↑	98%
Recreation facilities	93%	94%	98%	98%	94%	93%
Council	65%	74%	89%	76%	75%	81%
Service Burlington	89%	91%	93%	88%	98%	94%
Customer Service	87%	88%	90%	81%	98% ↑	95%

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