



Town of Newmarket

2018 Community Satisfaction Survey Key Findings Report



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Methodology

Background

The broad purpose of the survey is to measure the level of satisfaction and degree of importance for a variety of services provided by the Town. The survey includes 14 'core' questions drawn from the ICCS Common Measurements Tool (CMT) as well as several additional questions. The survey has been conducted in 2002, 2005, 2010, 2014 with a sample size of approximately n=800. In 2018, the sample size is n=808. Past research methodologies have been primarily telephone based with the option to complete online through the Town's website, or via mail through a paper copy of the survey available at Town offices or upon request. The 2014 and 2018 surveys were only conducted by telephone, with the inclusion of cell phone numbers, to ensure that we had a representative sample.

Field Dates & Response Rate

The research was conducted via live agent Computer-Assisted-Telephone-Interviewing (CATI) from June 20th to July 12th, 2018. In total, 808 surveys were completed with residents of the Town of Newmarket. A profile of respondents can be found in Appendix I – Demographics.

The overall response rate for this study was 13.5%.



Executive Summary

Overall, results for the 2018 Citizen Satisfaction Survey are extremely positive.

- Almost all residents (95%) are satisfied with Newmarket as a place to live, consistent with previous levels.
- The vast majority of residents (85%) indicated that they were receiving at least fair value for their tax payer dollars and user fees spent in support of Town services, also on par with historical levels. Looking at the top two box score (good or very good value), however, there has been a four point increase (from 48% to 52%) since 2014.
- More than 4 out of 5 residents (82%) are satisfied with the local municipal government. This metric has not been this high since 2002 after which time it has been on the decline for nearly a decade reaching a low of 71% in 2010. This increase to 82% is statistically significant, extends the upward trend which began in 2014, and puts this metric at an all-time high.
- Citizen Engagement Index remains stable at 72.

Consistent with the high levels of KPI, we see strong results in satisfaction levels of municipal services and programs. The improvement in overall satisfaction can also be traced to the very large increases in several programs and services.

- | | |
|--|---------------------|
| ▪ Public consultation on municipal processes: | increased 19 points |
| ▪ Museum: | increased 15 points |
| ▪ Children's Camps: | increased 12 points |
| ▪ Seniors Centre / Programs: | increased 12 points |
| ▪ Inclusion Programs (for people with disabilities): | increased 11 points |
| ▪ Yard waste collection: | increased 11 points |
| ▪ Animal control services: | increased 11 points |

Departments which residents had interaction with in the past year also performed well on the four service KPI's. Overall Satisfaction remains high at 80%. Satisfaction with the staff was strongest at 83%, but dropped 5 points over 2014; accessibility and quality remained strong at 83% and 81%, respectively; Timeliness remains the lowest item at 79%, 2 points lower than its 2014 standing. The service satisfaction for those who had contact with the Town has shown some deterioration, nothing significant or alarming, but something to keep an eye on.

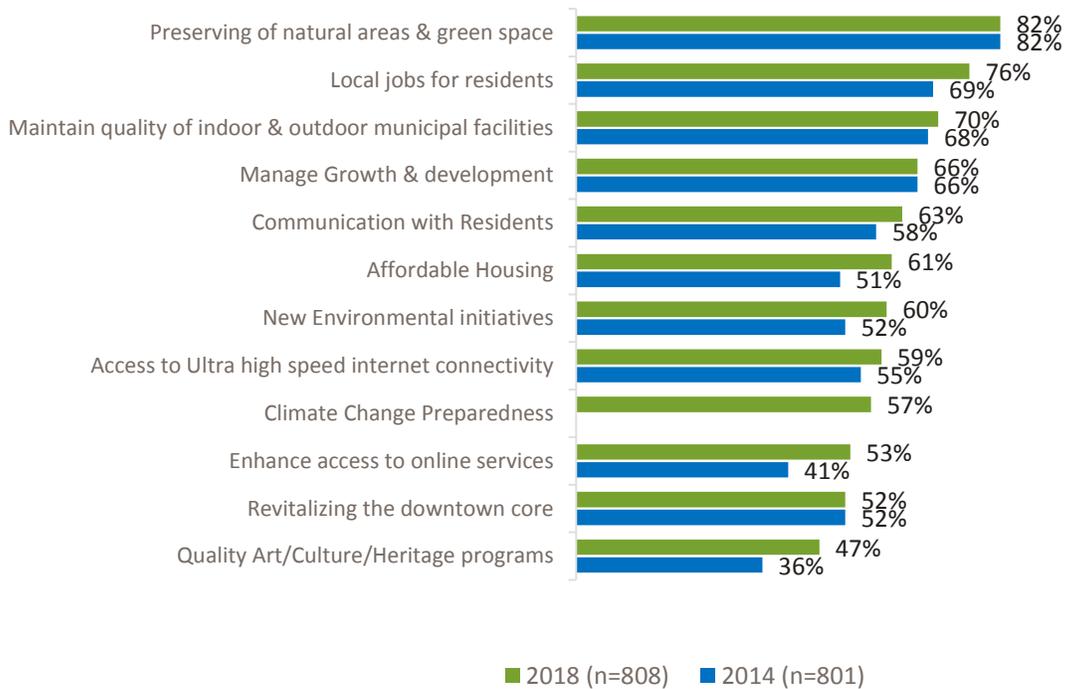


Council Priorities

Residents were asked to think about priorities that Newmarket Council could address in the future, and to rank the importance of each using a 10-point scale where 1 meant 'not at all important', and 10 meant 'extremely important'. The top three priorities in 2018 are consistent with those in the 2014 survey: Preservation of natural areas & green spaces, local jobs for residents, and maintaining the quality of indoor & outdoor municipal facilities (68%).

Items seen as less important to residents also remained the same: quality art / culture / heritage programs (47%), revitalizing the downtown core (52%), and enhancing access to online services (53%).

Top Priorities for Newmarket Council (Top 3 Box %)



Thinking about priorities that Newmarket Council could address in the future, how important is each of the following to you. Please use a 10-point scale, where 1 means "not at all important" and 10 means "extremely important."

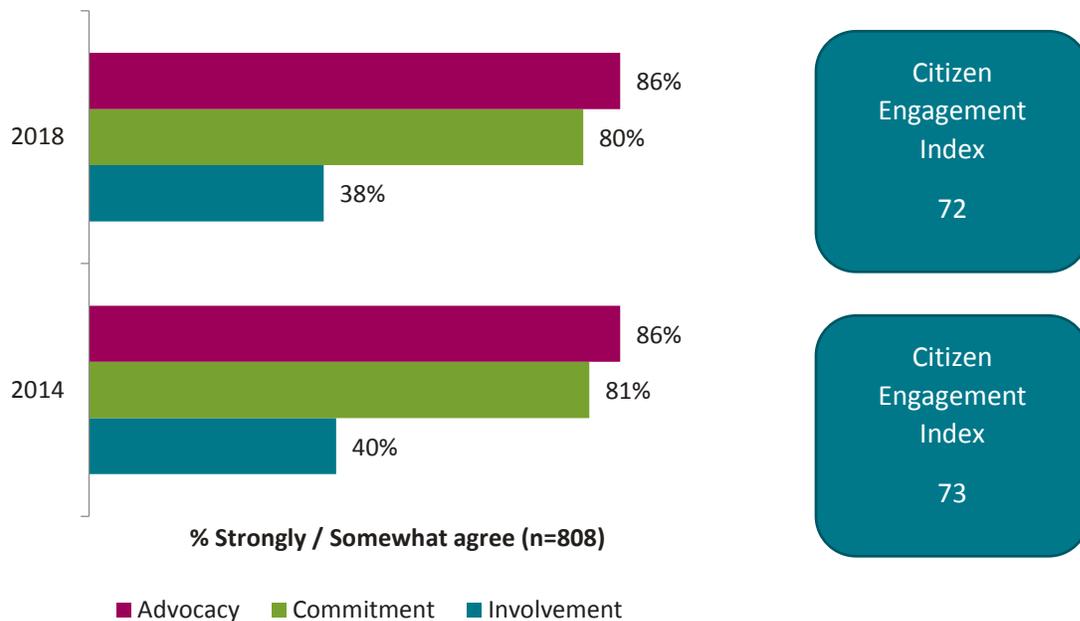


Key Performance Indicators

Citizen Engagement Index

Citizen Engagement is a composite measure of a set of behaviours associated with Engagement: the kind of behaviour that one would expect to see in Engaged Citizens. This is different than simply or merely being satisfied with the services provided by the municipality.

The town of Newmarket has a unique set of behaviours that they would like to see in their citizens and as such the following three statements are used to comprise the Newmarket Citizen Satisfaction Index. As it is a unique measure, a comparison to other municipalities does not exist. What is most important, however, from a benchmarking perspective, is to understand if improvements are being made to increase engagement over time.



Advocacy: “I would recommend Newmarket as a place to live”

Commitment: “I plan to reside in Newmarket for the foreseeable future”

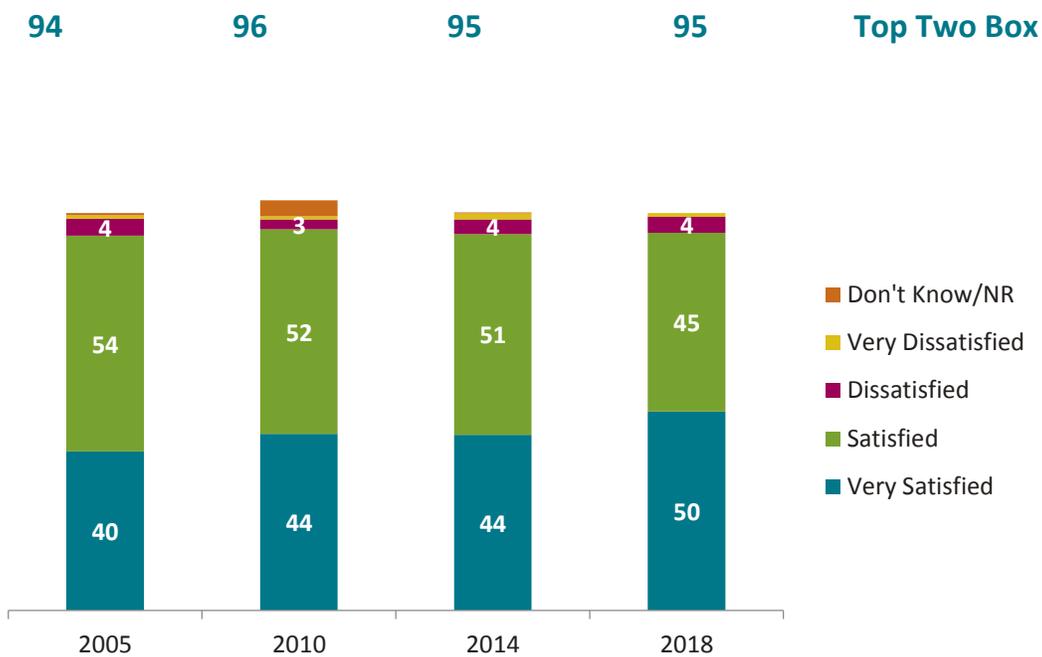
Involvement: “I often get involved in my community through cultural events, celebrations, recreation programs, volunteering, or other ways”



Town of Newmarket as a Place to Live

How do residents feel about the Town of Newmarket as a place to live in general? In keeping with previous findings, 95% of those surveyed indicated they are either very satisfied, or satisfied, with the Town as a place to live (50% very satisfied, 45% satisfied) showing that the Town of Newmarket is still seen by the vast majority of residents as a good place to live. Findings for 2018 for this question were not statistically different from 2014 results. However, the proportion saying they are very satisfied has reached an all-time high at 50%.

Overall Satisfaction with Newmarket as a place to live (%) n=808



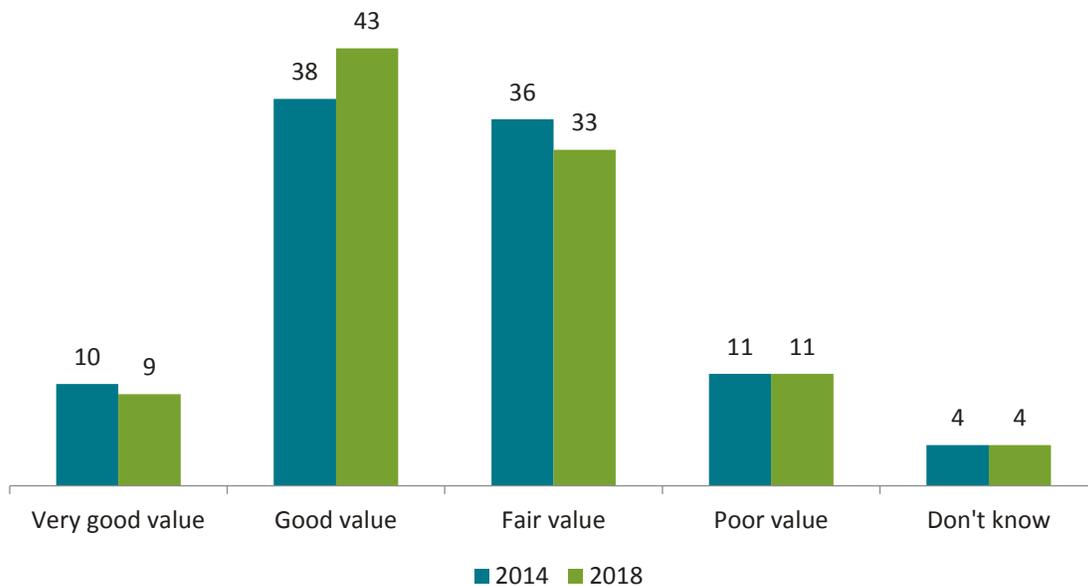
How do you generally feel about the Town as a place to live? Are you: very satisfied, satisfied, dissatisfied, or very dissatisfied?



Value for Money

When it came to value for tax dollars and user fees spent in support of Town services, 85% of residents indicated they felt they were receiving at least fair value for their money (9% very good value, 43% good value, 33% fair value), a strong result for this metric. The top two box (very good and good value), however shows a 4 point increase over 2014 (from 48% to 52%). Only 1-in-10 residents surveyed thought they were receiving poor value for money spent, and 4% indicated they didn't know enough to comment.

Value for Tax Dollars / User Fees (%) n=808



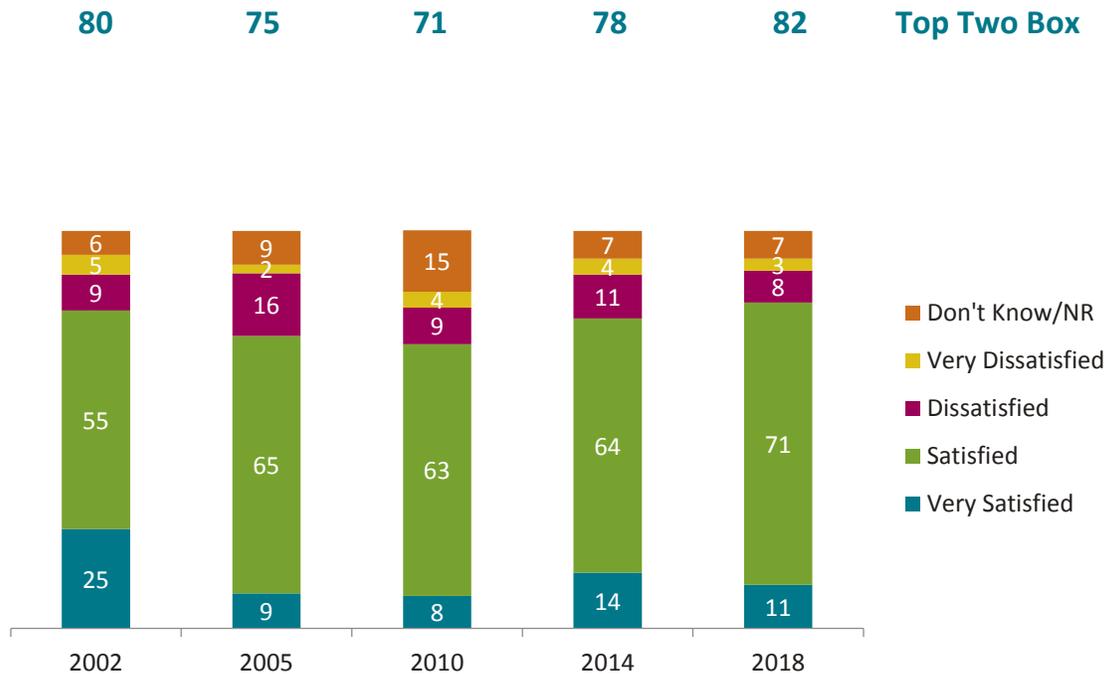
Your tax bill consists of payment for Town services, York Region & York Region School Boards. Thinking about the 40% of your tax bill that goes to supporting Town services along with user fees collected, would you say you receive: very good value, good value, fair value, or poor value for your tax dollars / user fees?



Overall Satisfaction with Local Municipal Government

Respondents were asked how satisfied they are with the Town of Newmarket municipal government. Overall Satisfaction trended downward from 2002 and 2005 before bottoming out in 2010 and reversing direction. Over 8-in-10 are now either very satisfied, or satisfied (82%). This marks another significant wave over wave increase (71% → 78% → 82%) and is the highest score recorded since 2002.

Level of Satisfaction with Local Government (%) N=808



How satisfied are you with the Town of Newmarket local municipal government? Are you: very satisfied, satisfied, dissatisfied, or very dissatisfied?

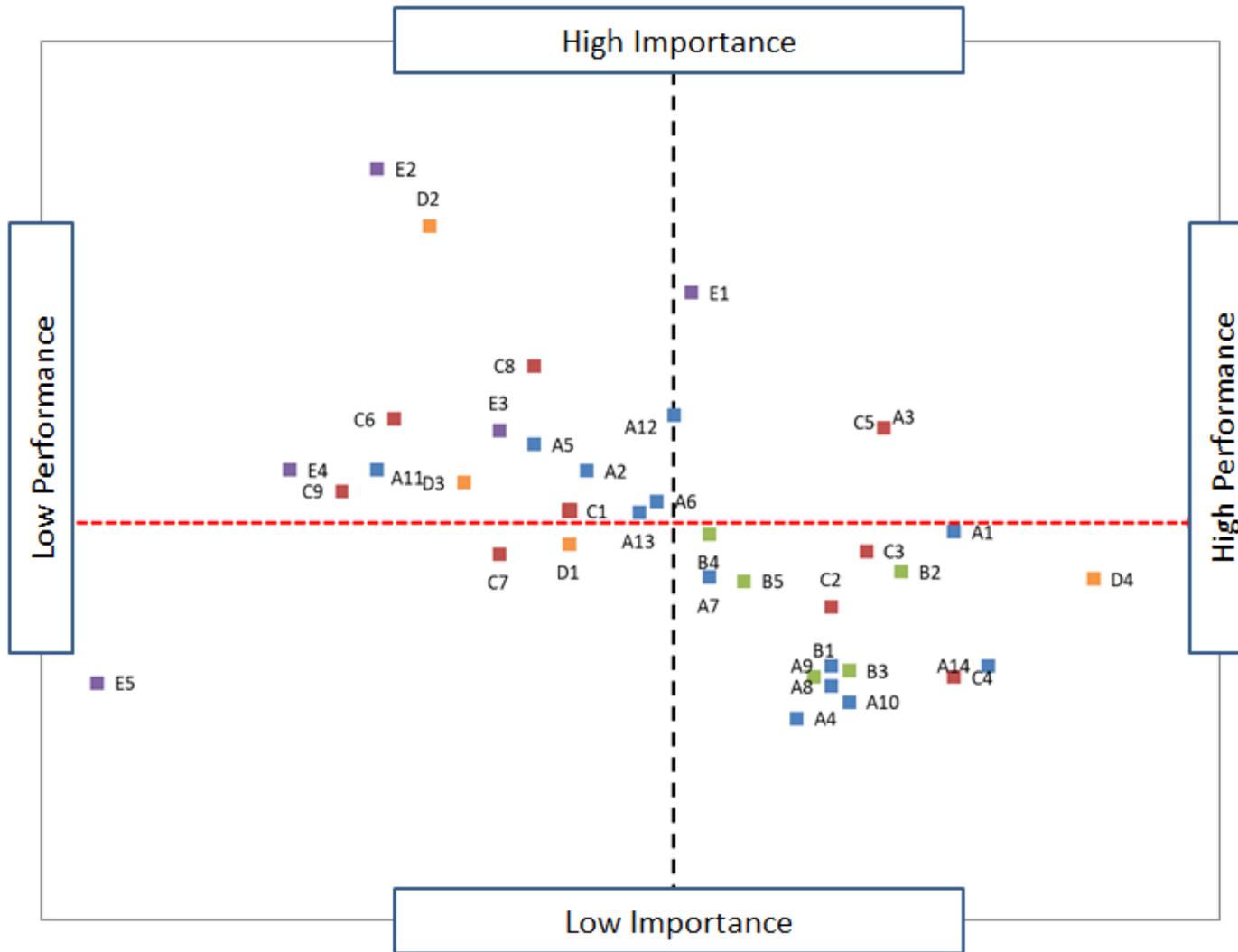


Priorities for Improving Overall Satisfaction with local government

Services and programs can have high or low satisfaction scores which means some are performing better than others. Service or programs can be more or less statistically correlated with overall satisfaction which means some have more importance than others when it comes to driving overall satisfaction. The quadrant analysis presented on the next page divides the services into four quadrants depending on their performance and importance scores. Items with high importance but low performance are priorities of focus for improving overall satisfaction.

The top priority items for improving residents' satisfaction with local municipal government were:

- public consultation on municipal processes (E2),
- traffic control and safety measures (C6),
- winter road maintenance (C8),
- Inclusion Programs (A5),
- Museum (A11),
- the Town of Newmarket website (E3),
- snow plowing for sidewalks (C9),
- parking (E4),
- bylaw enforcement (D2),
- adult recreation programs (A2),
- grass cutting / boulevard maintenance (C1), and
- parking enforcement (D3).





Rec and Culture		Facility and Field Condition		Public Works	
Walking/bike trails	A1	Aquatics facilities	B1	Grass cutting/boulevard maintenance	C1
Adult Recreation programs	A2	Skating facilities	B2	Parks maintenance	C2
Children's Recreation programs	A3	Sport Playing Fields	B3	Garbage / recycling collection	C3
Children's camps	A4	Youth Centre/Skate park	B4	Yard waste collection	C4
Inclusion programs	A5	Facility Newmarket Theatre	B5	Water supply	C5
Youth Recreation Programs	A6			Traffic control and safety measures	C6
Seniors Centre/programs	A7			Street sweeping	C7
Aquatic and swimming programs	A8			Winter road maintenance	C8
Arts and Culture programs/events	A9	Other Services		Snow plowing for sidewalks	C9
Public Library	A10	Interaction with Customer Service Centre	E1	Safety and Community Services	
Museum	A11	Public consultation on municipal processes	E2	Animal control services	D1
Newmarket Theatre	A12	www.newmarket.ca	E3	Bylaw enforcement	D2
Old Town Hall	A13	Parking	E4	Parking enforcement	D3
Community special events	A14	Availability of Parking in Downtown Newmarket	E5	Fire and emergency services	D4



Service Satisfaction

Residents were asked how they would rate various Recreation and Culture Programs and offerings on a scale of 1 to 5, where 5 represented 'very satisfied', and 1 'very dissatisfied'.

Recreation and Culture Programs Satisfaction and Willingness to Pay for improvements

On the top of the list were Community Special Events (88%), walking / bike trails (86%), and Children's Recreation programs (82%). Residents were least satisfied with the Museum (53%), followed by Inclusion Programs for people with disabilities (62%), and Adult Recreation Programs (65%). Inclusion and Adult Recreation Programs are services which residents say they are willing to pay more for to receive better service. Residents would like to see the former receive funding from a combination of user fees and taxes while the latter receive it primarily from users fees.

Comparison to historical data shows almost all items presented to residents showed some performance improvement from 2014 to 2018. The Recreation and Culture Programs that showed the largest gains were Museum (up 15 p.p.), Children's Camp and Seniors Centre / Programs (both up 12 p.p.), adult and children's recreation programs (both up 7 p.p.) and arts and culture programs / event (up 6 p.p.)

Items	2005	2010	2014	2018	2014-2018 Performance Gap	% Willing to Pay to Improve	% Taxes	% User fees	% both
Community Special Events	75%	77%	84%	88%	+4	9%	-	30%	70%
Walking / Bike Trails	59%	74%	86%	86%	0	22%	56%	-	44%
Children's Recreation Programs	64%	71%	75%	82%	+7	40%	-	75%	25%
Public Library	73%	75%	75%	80%	+5	62%	47%	16%	37%
Aquatic And Swimming Programs	46%	66%	75%	79%	+4	40%	14%	49%	37%
Arts And Culture Programs/Events	-	73%	73%	79%	+6	33%	-	86%	14%
Children's Camps	-	57%	65%	77%	+12	37%	-	59%	41%
Seniors Centre / Programs	60%	65%	60%	72%	+12	47%	61%	20%	19%
Newmarket Theatre (Program)	68%	72%	69%	70%	+1	9%	45%	17%	38%
Youth Recreation Programs	52%	51%	65%	69%	+4	53%	-	62%	38%
Old Town Hall	-	-	-	68%	N/A	10%	44%	12%	44%
Adult Recreation Programs	43%	53%	58%	65%	+7	49%	10%	71%	29%
Inclusion Programs (for people with disabilities)	-	46%	51%	62%	+11	62%	30%	7%	63%
Museum	45%	49%	38%	53%	+15	34%	11%	32%	57%



Recreation and Culture Facilities Satisfaction and Willingness to Pay for improvements

When it came to Recreation and Culture Facilities in the Town of Newmarket it was found that residents were most satisfied with Skating facilities (83%) and Sport Playing fields (80%). Residents were least satisfied with the Youth Centre / Skate Park (72%). Only 14% of those dissatisfied with the Youth Centre/Skate Park were willing to pay more for improved services.

Looking at historical trending of satisfaction levels with Recreation and Culture Facilities in the Town of Newmarket it was found that relative to 2014 satisfaction levels, all facilities have improved. The leading gains were noted for the Youth Centre / Skate Park (up 9 p.p., a significant increase), and the Sport Playing Fields (up 8 p.p.).

Items	2005	2010	2014	2018	2014-2018 Performance Gap	% Willing to Pay to Improve	% Taxes	% User fees	% both
Skating Facilities	57%	72%	79%	83%	+4	49%	4%	53%	43%
Sport Playing Fields	61%	67%	72%	80%	+8	56%	53%	-	47%
Aquatics Facilities	45%	74%	77%	78%	+1	39%	4%	68%	28%
Newmarket Theatre (Facility)	-	-	-	74%	N/A	19%	32%	14%	54%
Youth Centre/Skate Park	57%	50%	63%	72%	+9	14%	13%	10%	77%



Public Work Services Satisfaction and Willingness to Pay for improvements

Residents were also asked to rate their satisfaction with various Public Work Services. On the whole, in 2018 residents were most satisfied with Yard waste collection (86%), the Water Supply (82%), and Garbage / Recycling (81%). Public Work Services that residents were least satisfied with included Snow Plowing for Sidewalks (51%), Traffic Control and Safety Measures (54%) and Street Sweeping (60%).

Historically, all items show improvement over 2014 with yard waste collection (up 11 p.p.), garbage collection and snow plowing for sidewalks (both up 8 p.p.), street sweeping (up 7 p.p.), and grass cutting / boulevard maintenance (up 6 p.p.) showing significant increases over 2014.

Items	2005	2010	2014	2018	2014-2018 Performance Gap	% Willing to Pay to Improve	% Taxes	% User fees	% both
Yard waste collection	62%	81%	75%	86%	+11	8%	29%	15%	55%
Water supply	-	71%	79%	82%	+3	29%	39%	-	61%
Garbage / recycling collection	66%	80%	73%	81%	+8	12%	50%	24%	26%
Parks maintenance (e.g. playground equipment, benches)	67%	67%	76%	79%	+3	33%	57%	12%	31%
Grass cutting/boulevard maintenance	54%	54%	58%	64%	+6	20%	55%	5%	40%
Winter road maintenance (snow clearing)	60%	64%	61%	62%	+1	41%	68%	10%	22%
Street sweeping	57%	63%	53%	60%	+7	17%	59%	16%	25%
Traffic control and safety measures	39%	55%	52%	54%	+2	33%	66%	10%	24%
Snow plowing for sidewalks	46%	51%	43%	51%	+8	34%	45%	11%	44%



Safety and Community Services Satisfaction and Willing to Pay for improvements

The strong majority, over 9-in-10 (94%) indicated they were satisfied with Fire and Emergency Services in the Town. Residents were less satisfied with Bylaw Enforcement (56%) and Parking Enforcement (58%).

Historical comparison show that all Safety and Community Services showed some increase in performance with Animal Control (up 11 p.p.), Parking enforcement (up 8 p.p) and Bylaw enforcement (up 7 p.p.) showing significant increases.

Items	2005	2010	2014	2018	2014-2018 Performance Gap	% Willing to Pay to Improve	% Taxes	% User fees	% both
Fire and emergency services	92%	92%	94%	94%	0	24%	100%	-	-
Animal control services	55%	51%	53%	64%	+11	44%	59%	8%	33%
Parking enforcement	49%	42%	50%	58%	+8	29%	37%	13%	50%
Bylaw enforcement	46%	45%	49%	56%	+7	42%	75%	8%	17%



Satisfaction with Other Services

Residents were also asked to rate some 'other' services provided by the Town of Newmarket. Of these 'other' services it was found that residents were most satisfied with their interaction with the Customer Service Centre (71%), followed by the Town of Newmarket Website (60%). Residents were less satisfied overall with Public Consultation on Municipal Processes but that has jumped a significant 19 p.p. since 2014.

Items	2005	2010	2014	2018	2014-2018 Performance Gap
Interaction with Customer Service Centre	78%	81%	71%	71%	0
Town of Newmarket website www.newmarket.ca	-	-	58%	60%	+2
Public consultation on municipal processes	45%	48%	34%	53%	+19
Parking	-	-	-	48%	N/A
Availability of Downtown Parking	-	-	-	37%	N/A



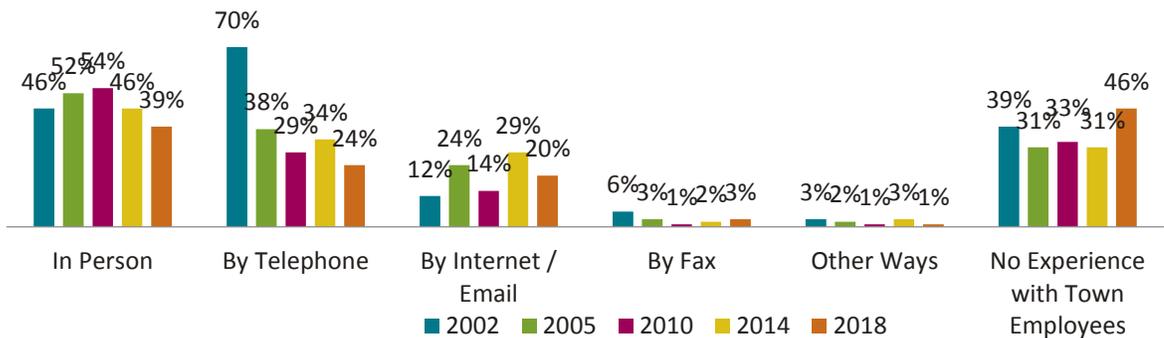
Contact with Municipal Departments / Services

Past Year Mode of Contact with Municipal Departments / Services

Of those residents who indicated they have had contact in the past year with Town of Newmarket municipal departments, the leading mention for mode of contact was in person (39%), followed by telephone (24%), and internet / email (20%). On the whole, 46% of residents mentioned they have no experience with Town employees in the past year.

Relative to previous year's findings, in person remains the most mentioned mode of contact although it has declined from 2014 (down 7 p.p.). Contact by telephone remained the second most frequently mentioned mode of contact, down 10 p.p., and internet / email remained the third although usage down 9 p.p.)

Historical Trending of Past Year Mode of Contact with Municipal Departments / Services



Within the past year, in what ways, if any, have you visited or accessed any of the Newmarket municipal departments to conduct business or obtain services?



Municipal Town Department / Service Last Accessed

The most frequently mentioned last Town Department / Services accessed in the past year were the Customer Service Centre (25%), and By-Law enforcement (9%) and the Planning Department (6%).

Municipal Town Department / Service Last Accessed n=472

Items	2018
Customer Service Centre	25%
By-law enforcement	9%
Planning Department	6%
Magna Centre	6%
Public works services	4%
Sports Fields	3%
Parking enforcement	3%
Finance	2%
Building Permits and/or inspections	2%
Library Services	1%
Town Council	1%
Community Centre	1%
Old Town Hall	1%
Clerk's office	1%
Seniors Centre	1%
Other (Specify)	31%



Satisfaction with Various Aspects of Most Recent Municipal Town Department / Service Interaction (CMT Questions)

Residents who indicated they had accessed a Town Department or Service in the past 12 months were then asked to rate their level of satisfaction with various items related to service delivery. In 2018, overall satisfaction with the staff who provided the service continues to receive high ratings (83%), as does accessibility of the service / product (83%).

Historically, all questions in this are statistically stable with the exception of satisfaction with the staff who provided the service, down 5 p.p.

Historical Trending of Satisfaction Various Aspects of Most Recent Municipal Town Department / Service Interaction (Top 2 Box %) n=472

Items	2005	2010	2014	2018	2014-2018 Performance Gap
Overall how satisfied were you with the staff who provided the service?	86	80	88	83	-5
Overall, how satisfied were you with the accessibility of the service/product?	84	82	83	83	N/C
How satisfied were you with the overall quality of service delivery?	83	77	81	81	N/C
Overall, how satisfied were you with the amount of time it took to get the service?	83	78	81	79	-2



Statement Agreement Regarding Most Recent Municipal Town Department / Service Interaction (CMT Questions)

Residents who had an interaction with a Municipal Town Department or Service in the past 12 months were also asked to rate their agreement level with a series of statements regarding their service interaction. It was found that residents were most likely to agree that the staff were courteous and respectful (89% each), and that they were treated fairly (87%). Residents were less inclined to agree that the staff went the extra mile to make sure they got what they needed (71%) and it was clear what to do for problem resolutions (75%).

Historical Trending of Statement Agreement Regarding Most Recent Municipal Town Department / Service Interaction (Top 2 Box %) n=472

Compared to 2010 levels, all services are statistically stable with the exception of being informed of everything they need to do in order to get the service/product/info which dropped 5 p.p. since 2014.

Items	2005	2010	2014	2018	2014-2018 Perf. Gap
Staff were courteous	89	89	90	89	-1
Staff were respectful	89	89	90	89	-1
I was treated fairly	89	86	89	87	-2
Staff were good listeners	84	81	83	84	1
Staff were knowledgeable and competent	86	80	86	83	-3
I was informed of everything I had to do in order to get the service / product / info.	86	81	85	80	-5
The hours of service were convenient	78	76	75	77	2
It was clear what to do if I had a problem	83	75	80	75	-5
Staff went the extra mile to make sure I got what I needed	80	70	71	71	N/C

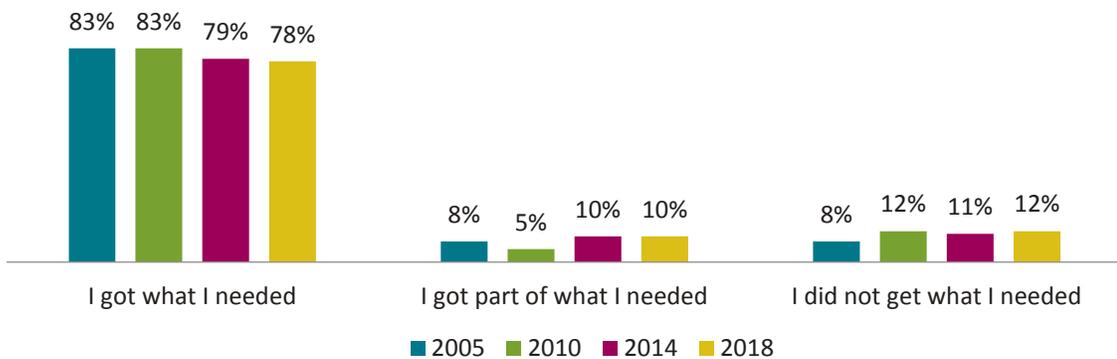


Needs Met During Most Recent Interaction

Residents were also asked if they got everything they needed during their most recent interaction with a Town Department or Service. On the whole, just shy of 8-in-10 indicated they got what they needed (78%), with 1-in-10 indicating their needs were either partially met, or not met at all (10%, 12% respectively).

Taking a look at results for this question in the past it was found that there have not been any significant changes over 2014.

**Historical Trending of Needs Met During Most Recent Interaction
(Top 2 Box %) N=472**



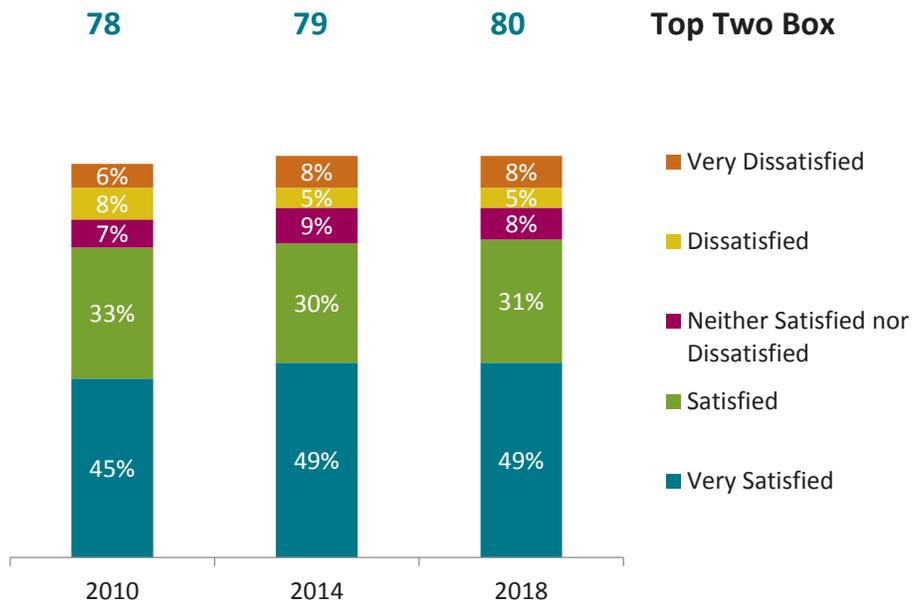
Again, based on this most recent experience and contact with the Town, in the end, did you...?



Overall Satisfaction with Service

Residents who had an interaction with a Town Department or Service in the past 12 months were also asked how satisfied they were with the service overall. In keeping with historical levels, 8-in-10 indicated they were satisfied (80%).

Satisfaction with Service (%) N=498



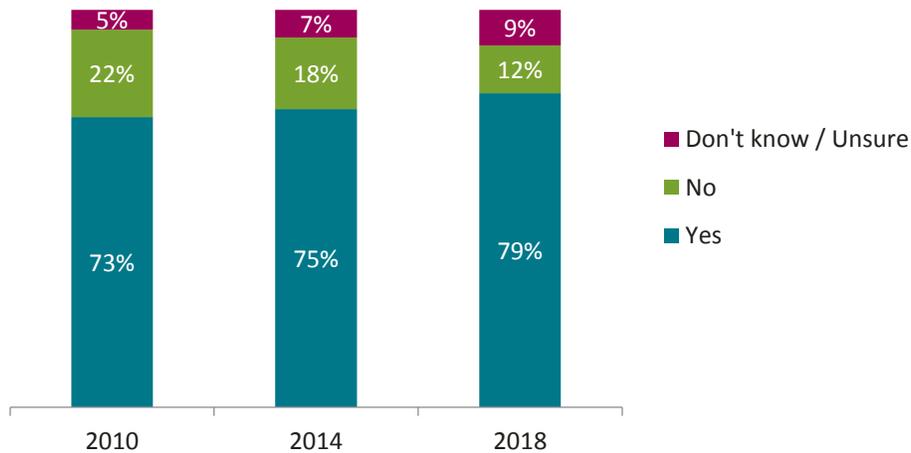
Overall, how satisfied were you with this service? Were you...?



Town of Newmarket Communication and Information Sources

When it came to the Town providing adequate information it was found that just under 8 out of 10 feel the Town does provide enough information (79%), with 1-in-10 feeling they don't (12%). Under 1-in-10 indicated they didn't know enough to give an answer 9%. These results show a trending improvement since 2010 with the proportion saying the Town provides adequate information on project, programs and service, up 6 points since 2010.

Adequate Information Provided on Projects, Programs and Service (Top 2 Box %) N=808

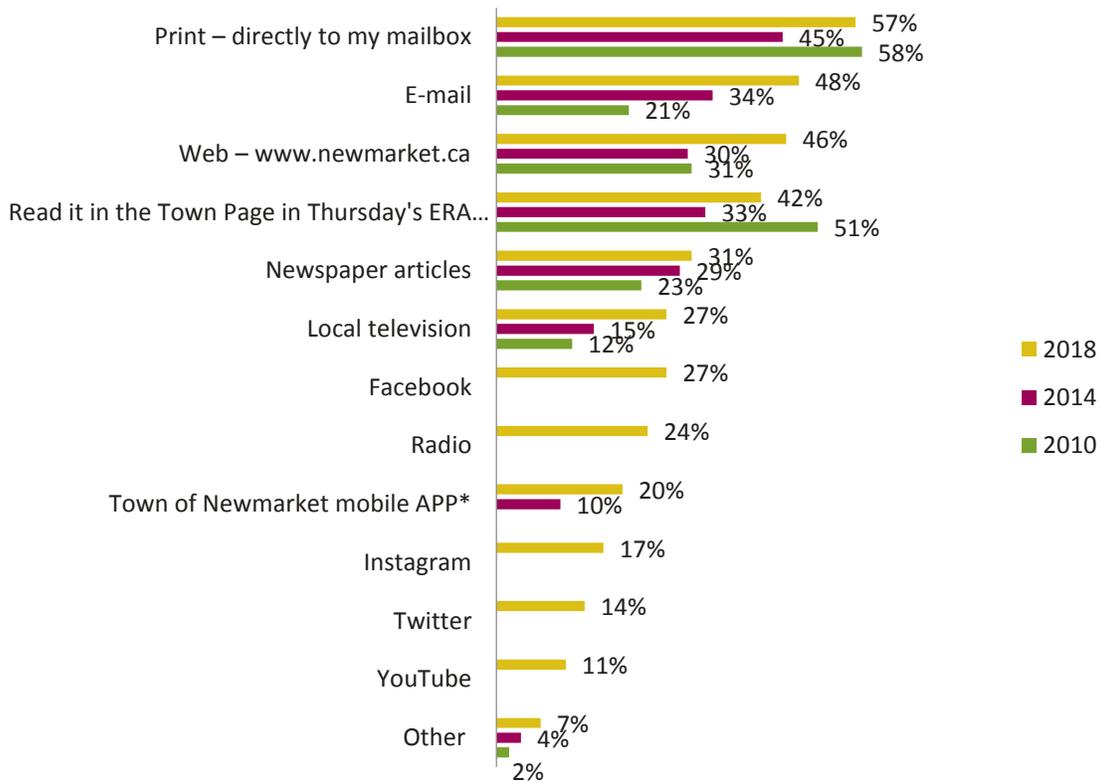


Do you feel the Town provides adequate information on projects, programs and services?



When asked how residents would prefer to receive information about the Town it was found that most preferred print, directly to their mailbox, 57%, up significantly from 45%, followed by e-mail, 48%, up significantly from 34%, and the town website 46%, up from 30%. Social media is also popular, particularly facebook at 27%.

Preferred Means of Receiving Information about the Town n=808



How would you prefer to receive Town information?



Additional Comments / Suggestions for Improvement

What additional comments or suggestions did residents provide about the Town of Newmarket to achieve customer service excellence in the future? The top two responses were 'Better communication with the public/advertise services' (19) and 'Slow/stop the pace of development and new building' (17). These comments/suggestions were followed by 'Town Councillors are out of touch/not accountable' (13), 'Listen to what the public has to say' (12), 'Finish the roadwork on Davis Drive' (11), and 'Greater transparency/accountability on how tax dollars are spent' (11).

Items	2018
Better communication with the public/Advertise services	19
Slow/Stop the pace of development and new building	17
Town council/Councillors are out of touch/not accountable	13
Listen to what the public has to say	12
Finish the roadwork on Davis Drive	11
Greater transparency/accountability on how tax dollars are spent	11
Improved/faster roadwork and road maintenance	10
More recreational facilities (skate parks, , senior center, splash pads, etc.)	10
Shorten the length of the survey	9
More by-law enforcement	8
Improve traffic congestion	7
Keep doing surveys/Happy to do survey	7
Protect green space/parks	7
More recreation and culture programs	7
More use of social media/the internet to communicate with residents	7
Lower taxes	6
Curb spending of tax dollars	6
Expand/Improve transit system	6
More efficient use of current staff/resources	6
Stop the Glenway development	5
Roadwork on Davis Drive is hurting businesses	5
Need more senior's residences/affordable senior living	5
Build an off-leash dog park	4
Expand/Maintain the trail system	4
Simplify the phone system/Be easier to reach	4
Improve/fix the drinking water	3
Better clearing of roads/sidewalks in the winter	3
Longer office hours	2
Garbage pick-up should be expanded	2

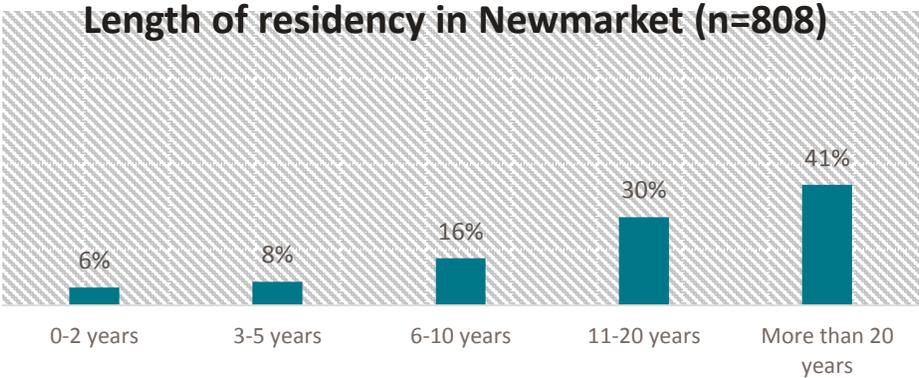
Do you have any additional comments or suggestions about what the Town of Newmarket could do to achieve customer service excellence in the future? (Question was open ended)



Appendix I - Demographics

Length of Time Lived in Town of Newmarket

Most residents surveyed have lived in the area for more than 10 years (30% 11-20, 41% 20+ years).



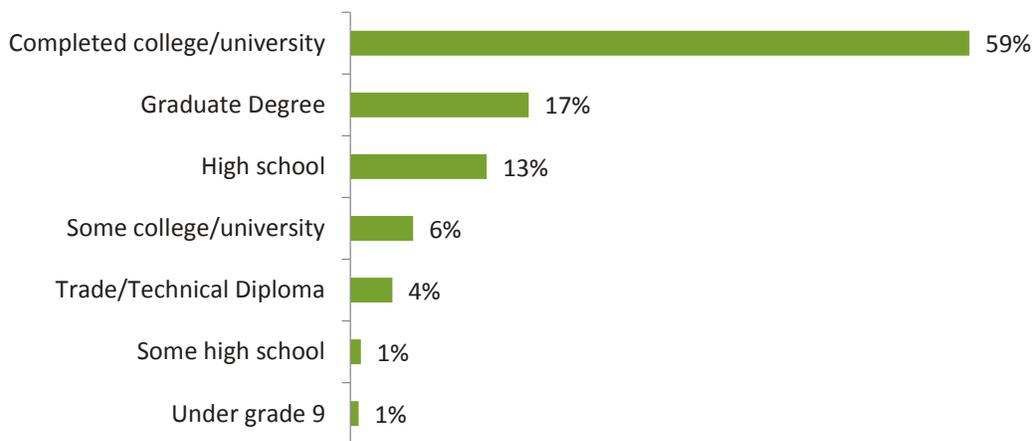
How long have you lived in Newmarket?



Respondent Highest Level of Education Completed

Over half of residents surveyed have completed college or university (59%), with just shy of 1-in-5 holding a graduate degree (17%).

Level of Education (n=808)

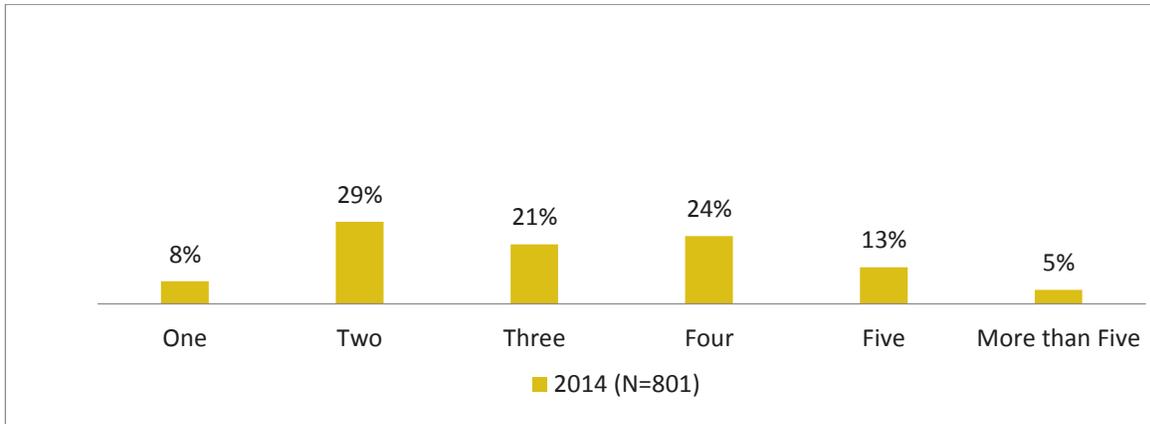


What is the highest level of formal education that you have completed?



Number of Persons in Household

Most residents who completed the survey indicated they have between two to four persons living in their household (29% two, 21% three, and 24% four).

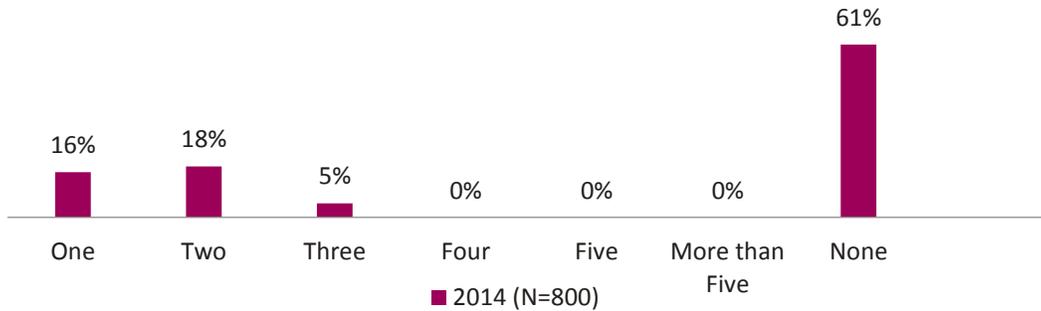


How many people live in your household?



Number of Children in Household (<18 years of age)

More than 6-in-10 indicated they have no children in the household.



How many are children under the age of 18?