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CITIZEN SATISFACTION SURVEY

September 2021



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INTRODUCTION

Research Objectives

The objectives of the 2021 Citizen Satisfaction Survey are to:

- Determine the overall impressions of and identify top-of-mind issues toward the quality of life in the City.
- Determine the level of satisfaction with and perceived importance of services provided by the City.
- Identify citizen perceptions and expectations concerning specific municipal planning priorities.
- Determine the level of satisfaction with City communications, how citizens would like to receive information and preferred ways of engagement in the future.
- Determine the level of satisfaction with City service channels, how citizens would like to receive services and preferred ways for service provision in the future.
- Utilize the results of the 2021 Citizen Satisfaction Survey to compare with a municipal norms database and set a baseline.

Methodology

Method	CATI (Computer Aided Telephone Interview) and CAWI (Computer Aided Web Interview)
Criteria for Participation	Residents and property owners in Owen Sound who are 18 years of age or older
Sample Size	CATI: n = 401 / CAWI: n = 908 CATI results throughout this report have been statistically weighted by age, gender, and income, to ensure that the sample reflects the target population according to 2016 Census data.
Average Length	CATI: 22 min / CAWI: 13 min
Margin of Error	±3.64%
Fieldwork Dates	July 12-30, 2021

Interpreting this report

TOP2 / BTM2 and TOP4 / BTM4

Top 2 (TOP2) and Bottom 2 (BTM2) or Top 4 (TOP4) and Bottom 4 (BTM4) reference the collected TOP2 positive and BTM2 or TOP4 positive and BTM4 negative responses, respectively where applicable. For example, a TOP2 grouping referred to as “satisfied” may be the combined result of “very satisfied” and “somewhat satisfied,” where a grouping of “not satisfied” (BTM2) may be the combined result of “not very satisfied” and “not at all satisfied.” Similar logic applies to TOP4 and BTM4 groupings.

Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 or TOP4 and BTM4 groupings.

Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., “Which of the following communication methods have you used?”), it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select “email” and “physical mail/inserts” as their answer.

Significance Testing

Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes. It is important to point out that, statistical differences exist only between the segments mentioned in the notes.

Interpreting this report

Phone vs. Online Data

The data in this report have been collected from two different sources: 'Phone' data collected through computer assisted telephone interviews (CATI) by Forum Research, and 'Online' data (CAWI) collected through an open link hosted by the City of Owen Sound in their website.

For CATI, Forum used a random digit dial (RDD) methodology, which means that everyone in Owen Sound had an equal chance of being contacted, regardless of whether they use a landline or cell phone. All CATI results in this report have been also weighted by age, gender, and income to accurately reflect the demographics of Owen Sound as reported in the 2016 Census. On the other hand, the sample from CAWI consist of only self-selected respondents, who have chosen to take part in the survey on their own accord, and all having computer access and internet connection. Due to this fact, CAWI data is likely to be affected by a certain degree of self-selection bias and cannot be representative of Owen Sound demographics. In addition, online respondents tend to be less positive about the City in general, though this is common in municipal research and is not unique to Owen Sound.

Subsequently, throughout this report, the findings have been based on the results of the representative data (i.e., Phone), though two data sources (i.e., phone and online) have been demonstrated side by side in each slide without being compared to each other.

Interpreting this report

No Open-Ended Questions

Open-ended questions have not been used in this survey mainly because of two reasons: First, the main objective of this survey is to gather quantitative data to set a benchmark for the next quantitative surveys. However, open-ended questions provide qualitative data by nature. Second, time is always one of the main constraints in quantitative surveys. When the survey gets longer, the respondents get fatigued, and this may affect their responses. Therefore, it has been decided to use a questionnaire without open-ended questions, focusing only on providing quantitative data within an optimum survey length. However, this doesn't rule out gathering qualitative data in future surveys or pulse surveys on specific topics.

Data Cleaning / Verification

Data cleaning for CAWI had two components, pre-cleaning through programming that was carried out while surveys were underway and post-cleaning through analysis of raw data that was carried out after fieldwork was completed.

During pre-cleaning, skip patterns were automated to ensure all relevant questions were asked. Each response was confirmed in the surveys to minimize key-punch error. Valid codes were checked to eliminate key-punch errors. Out of range values were checked so that outliers are reduced.

During post-cleaning, frequencies of result codes against a list of valid codes were checked. All responses against all previous questions were validated. Inapplicable data where respondents have changed their minds or outliers were identified and erased.

KEY FINDINGS AND RECOMMENDATIONS

Key findings

Life in Owen Sound

Three quarters (TOP2: 74%) of Owen Sound residents rate their quality of life as either good or excellent. This is especially true for residents who are aged 65 and older (TOP2: 88%). [Slide 18](#)

- Nearly half (46%) think the quality of life has stayed the same over the past three years. [Slide 20](#)
- One quarter (25%) of residents were enthusiastic about recommending Owen Sound to others as a place to live. However, the number of promoters is lower than the number of detractors, resulting in a negative Net Promoter Score (-15). [Slide 24](#)
- Residents mentioned affordable housing, the cost of living, and homelessness (29%) as the most important issue facing Owen Sound today. [Slide 22](#)

In line with the percentage of residents who rate their quality of life as either good or excellent, the majority also think that Owen Sound is a welcoming and inclusive community (TOP2: 76%), as well as an accessible community (TOP2: 79%). [Slides 26-27](#)

On the other hand, Owen Sound's aging population was a concern for about half of residents (TOP2: 52%). [Slide 30](#)

Key findings

Satisfaction with Services

Three quarters (TOP2: 75%) expressed satisfaction with the services delivered by Owen Sound. [Slide 32](#)

Prior to the Covid-19 pandemic, residents most frequented Harrison Park (TOP2: 61%), waterfront areas (TOP2: 44%), and other parks and green spaces (TOP2: 41%). Residents were also satisfied with all *Green City* services that Owen Sound provides. Parks and trails (TOP4: 87%) was the top service overall that residents were satisfied with. [Slides 34, 40](#)

On the other hand, other services such as roads and sidewalks (TOP4: 46%) and winter maintenance of sidewalks (TOP4: 45%) were services that residents were least satisfied with. [Slide 40](#)

Key findings

Gap Analysis

A statistical analysis has been used to show the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction. [Slide 43-44](#)

Results from the analysis show primary areas that Owen Sound can improve on:

- Winter maintenance-Sidewalks,
- By-law,
- Parking, and
- Downtown Revitalization

The major service recommended to focus on for each service group are closely aligned with the primary areas for improvement, with the exception of *garbage and recycling collection*, which is a primary area for maintenance and has a very high impact on overall satisfaction:

- **Winter maintenance-Sidewalks** in *City that moves*
- **Garbage and recycling collection** in *Green city*
- **By-law** in *Safe city*
- **Downtown revitalization** in *City building*

Key findings

Communication

Majority of residents (72%) are aware that they can watch live council meetings on Rogers cable or online. Of those who are aware, more than two thirds (68%) have either never or rarely watched these meetings. [Slides 46-47](#)

2 in 5 residents (41%) have contacted the City of Owen Sound in the past 12 months. [Slide 48](#)

- The main reasons for contacting the City were to make a property/by-law complaint (13%), inquire about building permits (10%), or report a problem (9%). Most residents (TOP4: 73%) were satisfied with the quality of the service delivery from their interaction. [Slides 50-51](#)
- Residents who have interacted with or contacted City staff were most likely to do so via telephone (82%) or email (50%). [Slide 49](#)

When it comes to receiving communications from the City of Owen Sound, residents would prefer to do so by email (52%) or physical mail / inserts (34%). [Slide 52](#)

Key findings

Spending and Taxation

Majority of residents (TOP2: 75%) said they receive a good value of city programs and services for their tax dollars. [Slide 54](#)

In order for the City to balance cost of services with taxation, the plurality of residents would prefer to maintain taxes or reduce services and programs (44%). [Slide 55](#)

- Of these respondents who provided an opinion on which services they would reduce in order to maintain taxes, the plurality (25%) said to reduce policing and fire services. [Slide 56](#)

Majority (62%) also said that services and programs should be available for everyone though property tax revenues rather than through user fees. [Slide 57](#)

Recommendations

Improvement in overall service satisfaction

- The services in the primary and secondary areas for improvement from the Gap Analysis are the areas where further focus may contribute to an improvement in overall service satisfaction scores and NPS.
 - Winter maintenance of sidewalks, downtown revitalization, parking, and by-law are all primary areas for improvement. Making a property or by-law complaint was also the most common reason respondents contacted the City in the past 12 months. Reviewing the specifics of these complaints and creating solutions accordingly will help boost overall satisfaction in the long-run.
- The services in “the secondary areas to maintain” category, such as fire and police services, are the ones with higher satisfaction but lower impact on overall satisfaction scores. Moreover, when residents are asked which service they would prefer to reduce to maintain taxes, the plurality spontaneously mentioned fire and police services. In the long-run, revising the budget allocation by increasing the share of resources for services in the primary and secondary areas for improvement will help increase overall satisfaction levels.

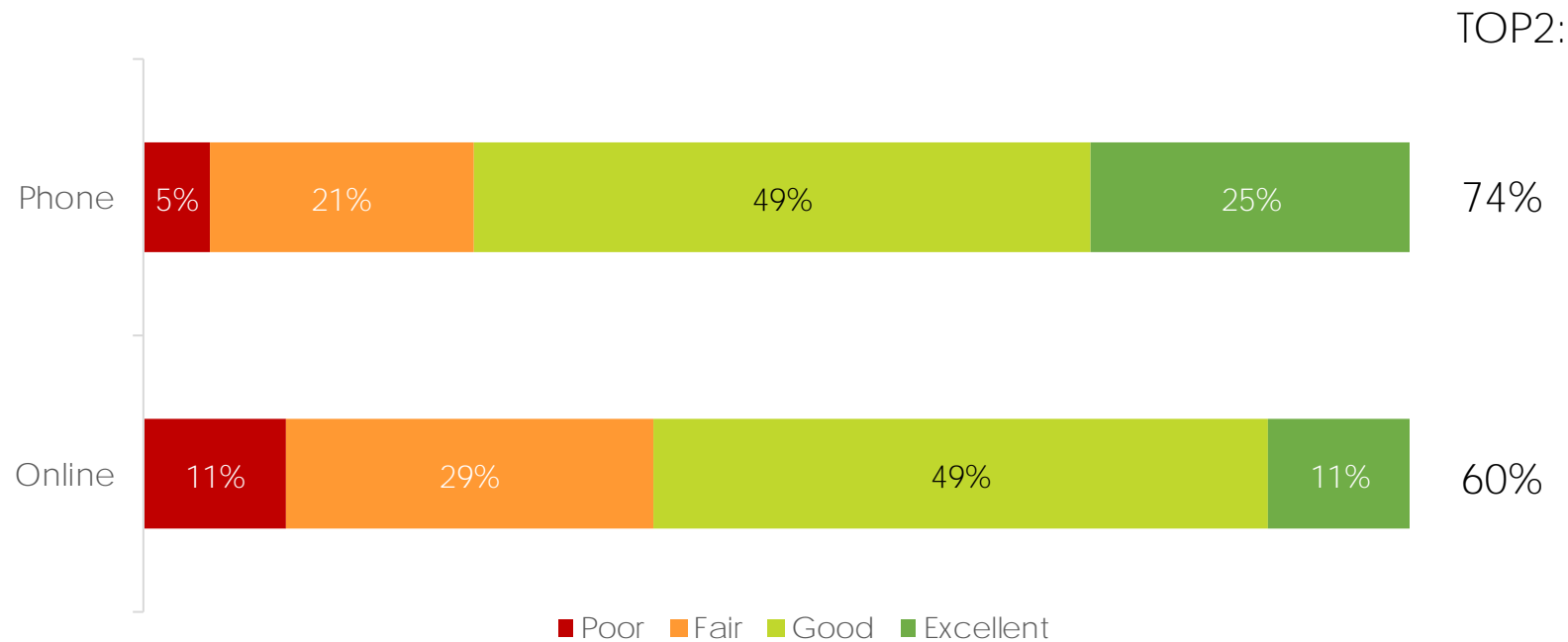
Lastly, monitoring and maintaining services that yield high satisfaction scores and have high impacts on overall satisfaction, such as garbage and recycling collection, library services, drinking water, and parks and trails, will continue to drive overall positive satisfaction scores and NPS.

DETAILED FINDINGS

Life in Owen Sound

Quality of Life

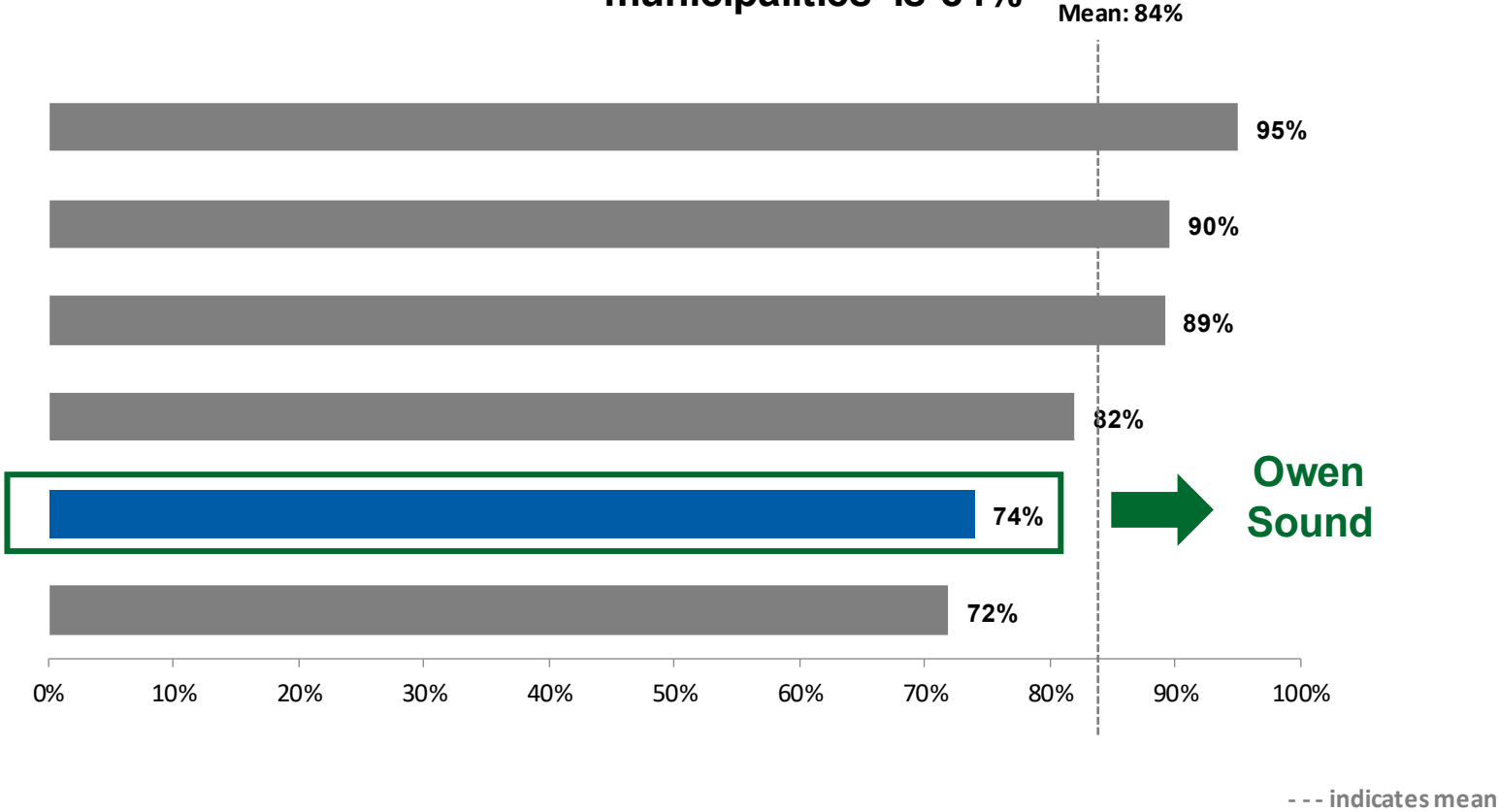
Three quarters of residents (TOP2: 74%) rated their quality of life as either good or excellent



- Residents who rated the quality of life as either good or excellent were more likely to:
 - Be aged 65+ (TOP2: 88%) than aged 25-34 (TOP2: 58%), 35-44 (TOP2: 61%), 45-54 (TOP2: 75%) and 55-64 (TOP2: 74%).
 - Own their home (TOP2: 80%) than rent their home (TOP2: 65%).
 - Have an income from \$80K to \$100K (TOP2: 85%) than have an income from \$20K to \$40K (TOP2: 65%).
- 6 in 10 residents (TOP2: 60%) from the online survey rated their quality of life positively.

Quality of Life – Benchmark (Good + excellent %)

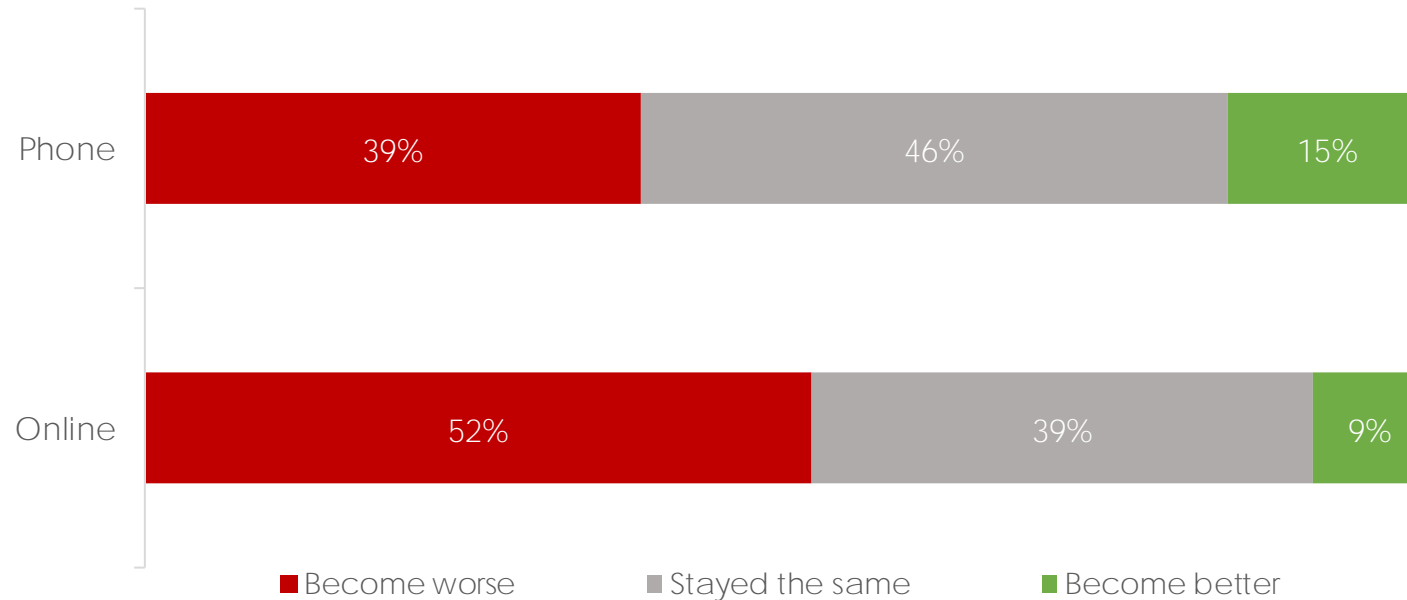
While three quarters (74%) of Owen Sound residents rated their quality of life as either good or excellent, the average score across 6 Canadian municipalities is 84%



- When compared with benchmark municipalities, Owen Sound ranks below the average (74% vs 84%).

Change in Quality of Life

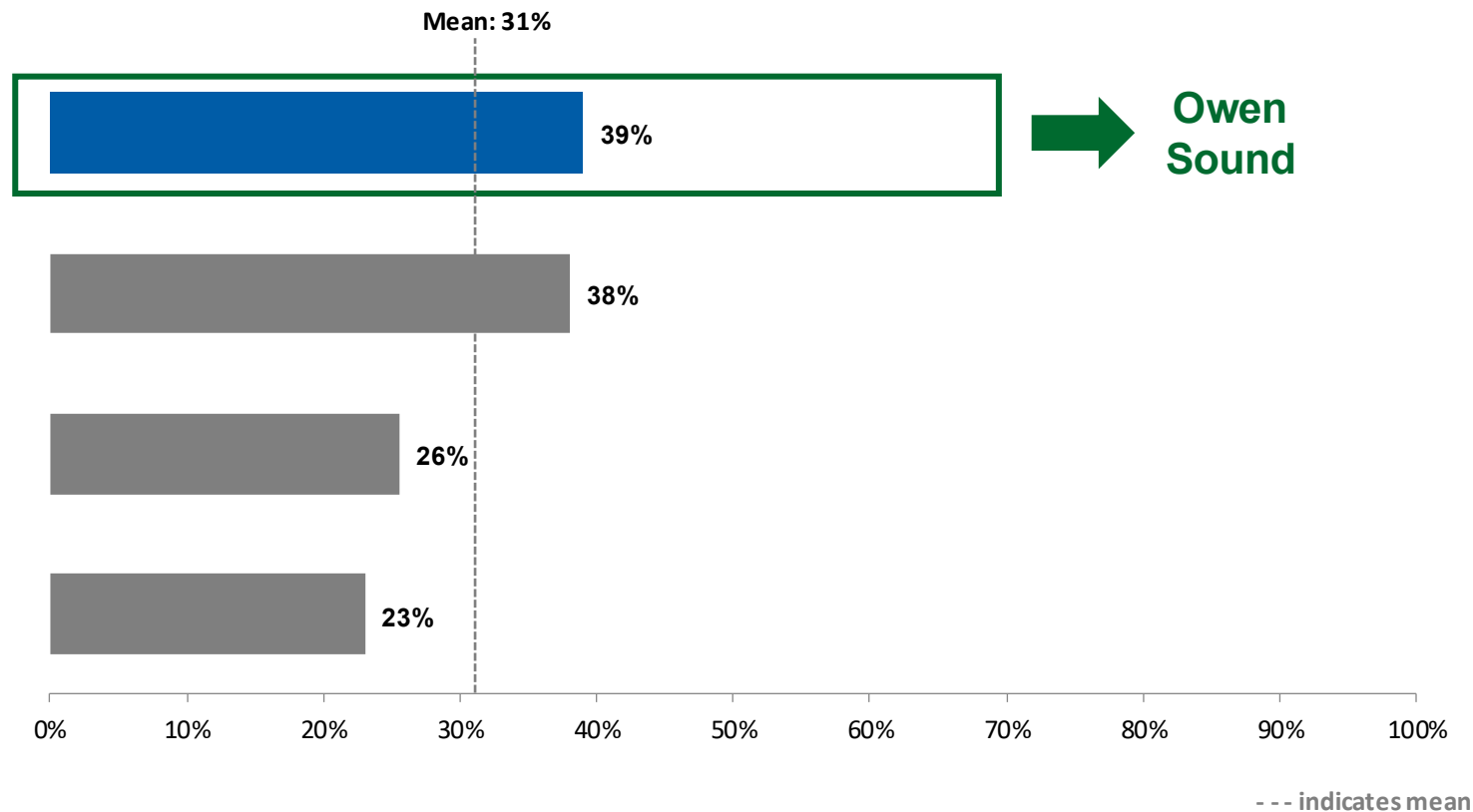
Nearly half (46%) think the quality of life in Owen Sound has stayed the same within the past three years, while 1 in 6 (15%) think it has become better



- About 4 in 10 (39%) said the quality of life in Owen Sound has become worse in the past three years. These residents were more likely to be aged 55-64 (44%) compared to 65+ (28%).
- Half (52%) of residents from the online survey also think the quality of life in Owen Sound has become worse within the past three years.

Change in Quality of Life – Benchmark (Become worse %)

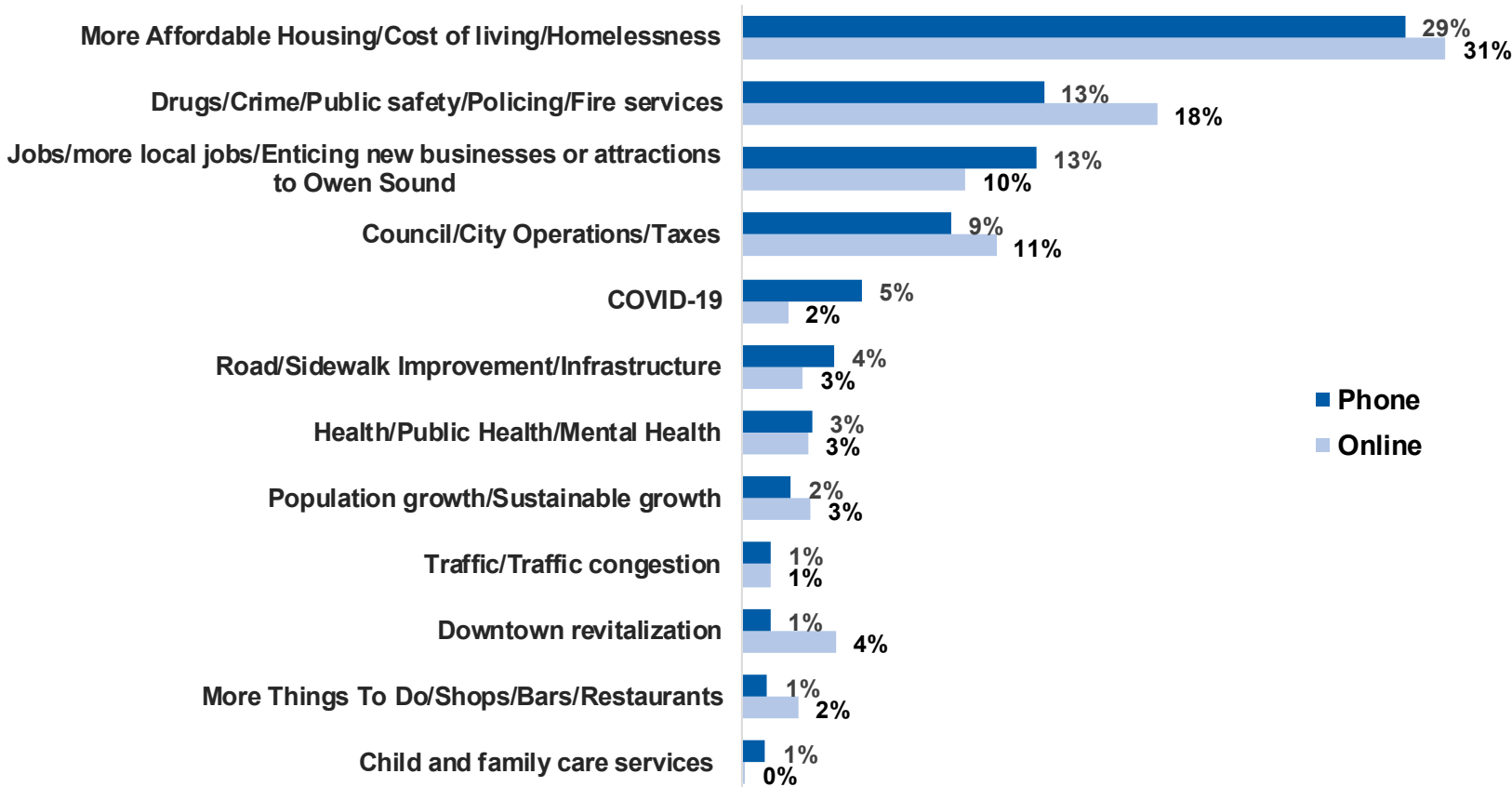
Around 2 in 5 (39%) Owen Sound residents think the quality of life have become worse in the last 3 years, and the average score across 4 Canadian municipalities is 31%



- Owen Sound has been one of the 2 municipalities where the proportion of residents who think the life has become worse in the last 3 years is over the benchmark average.

Issue Agenda

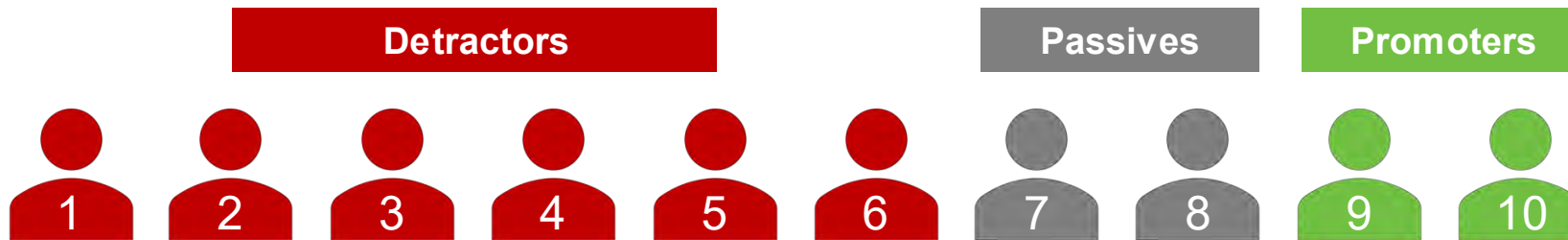
Residents say the the most important issue facing Owen Sound today is related to housing, cost of living, and homelessness



- Almost 3 in 10 residents (29%) mentioned affordable housing, cost of living, and homelessness as the most important issue facing Owen Sound today.
- The other common issues mentioned were related to safety (13%), creating more local jobs (13%), and city operations (9%).

Net Promoter Score (NPS) Analysis

Net Promoter Score = Promoters – Detractors



Question: *How likely would you be to recommend Owen Sound as a place to live to a friend or colleague? Please use a number from 1 to 10, where 1 is not likely at all, and 10 is extremely likely.*

The Net Promoter Score (NPS) assesses the willingness of residents to promote Owen Sound. The NPS was measured by asking residents to rate their likelihood of recommending Owen Sound as a place to live, on a scale from 1 to 10, with 1 being not at all likely and 10 being very likely.

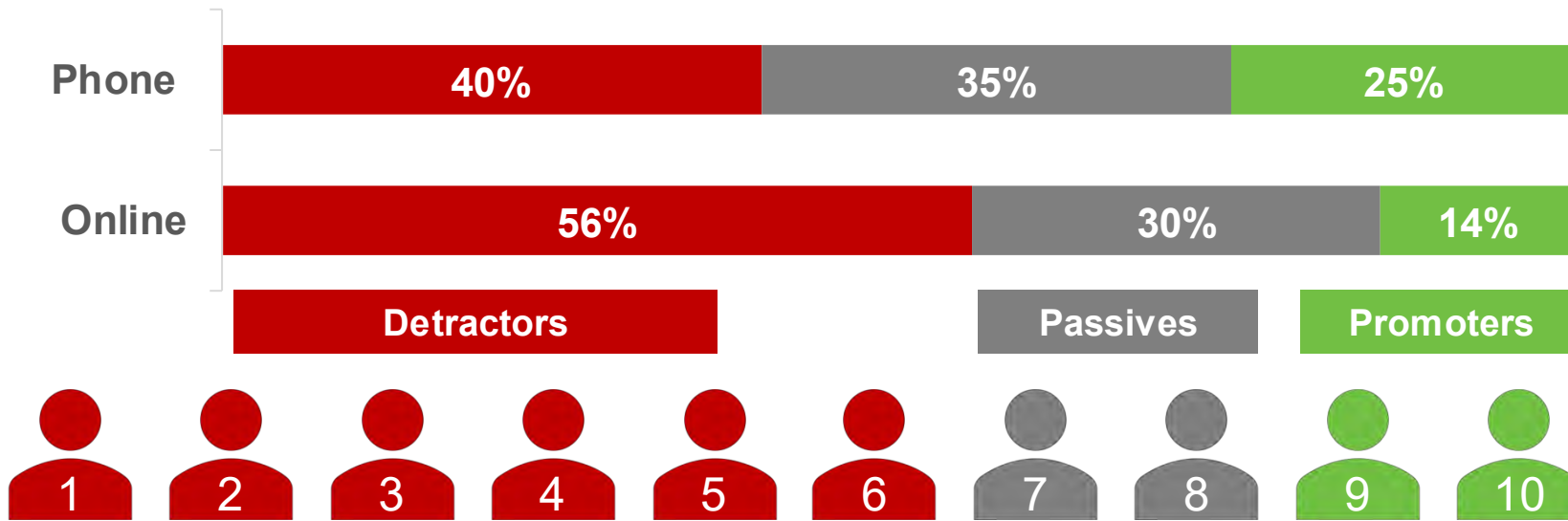
Based on the score provided, residents were classified as Promoters, Passives, or Detractors of Owen Sound. A Net Promoter Score (NPS) is calculated by subtracting the detractors from the promoters, which provides a net score for the proportion of residents promoting Owen Sound.

In the context of municipalities, NPS is a measurement for a City's overall reputation in the eyes of its residents. Promoters are people who generate positive word of mouth about their city, whereas detractors are those who don't support or endorse it. Passives don't have an active role, thus are not included in the equation but in the long-run, they may change the score by moving in either directions.

The evaluation of whether an NPS score is good or bad depends on many factors. For municipalities, scores may vary depending on the population, location, size of the municipality, etc. Keeping track of the score over time and working on increasing this score while changing or making new policies would be a more effective and strategic usage of NPS metric.

Recommending Owen Sound Net Promoter Score (NPS) Analysis

An NPS score of -15 was reported as a result of 25% promoters and 40% detractors



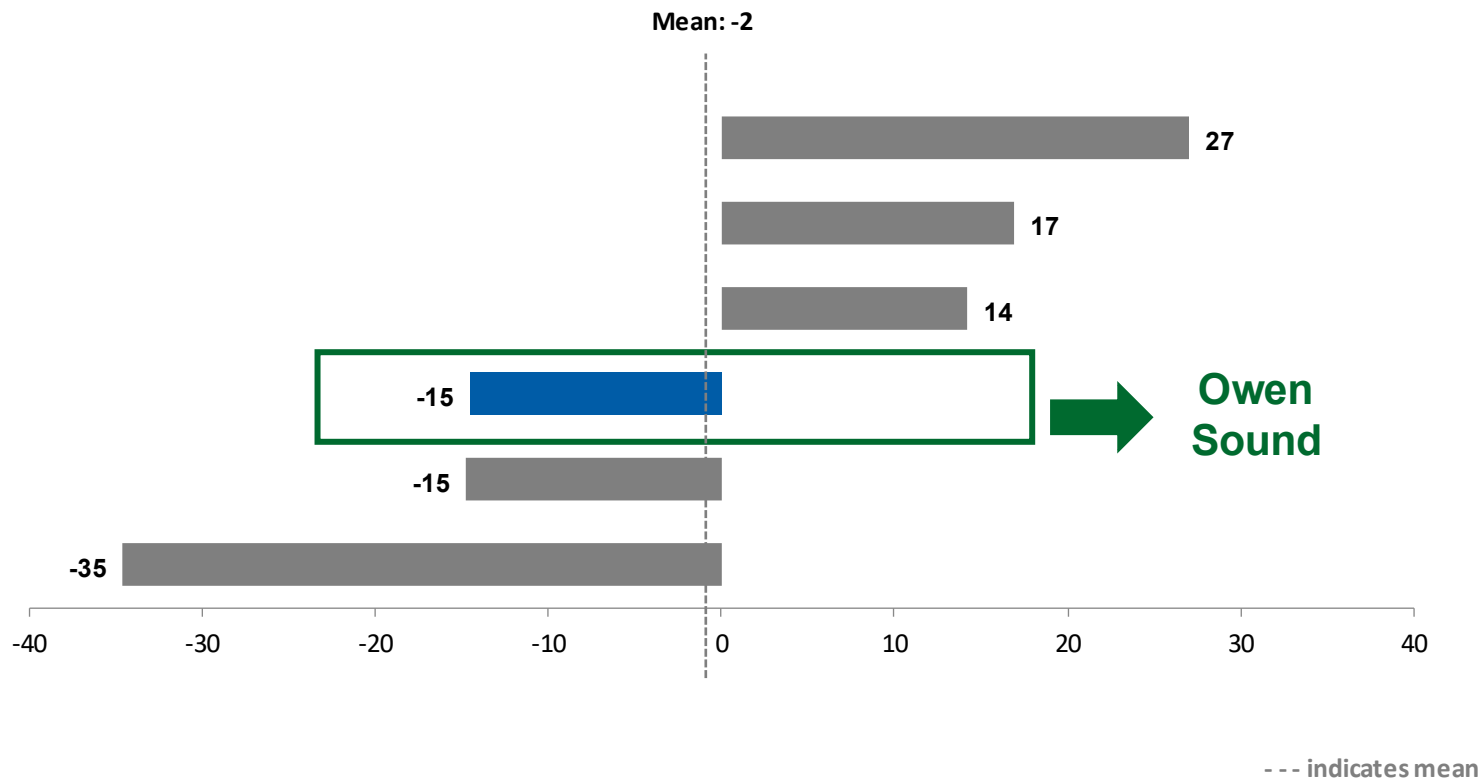
Net Promoter Score (Phone) = 25 - 40 = - 15

Net Promoter Score (Online) = 14 - 56 = - 41

- One quarter of residents (Promoters: 25%) were enthusiastic about recommending Owen Sound to others as a place to live.
- Promoters were more likely to be aged 65+ (42%) than aged 25-34 (16%), 35-44 (9%), and 45-54 (17%).
- 1 in 7 (14%) residents who participated in the online survey were promoters.

Net Promoter Score – Benchmark

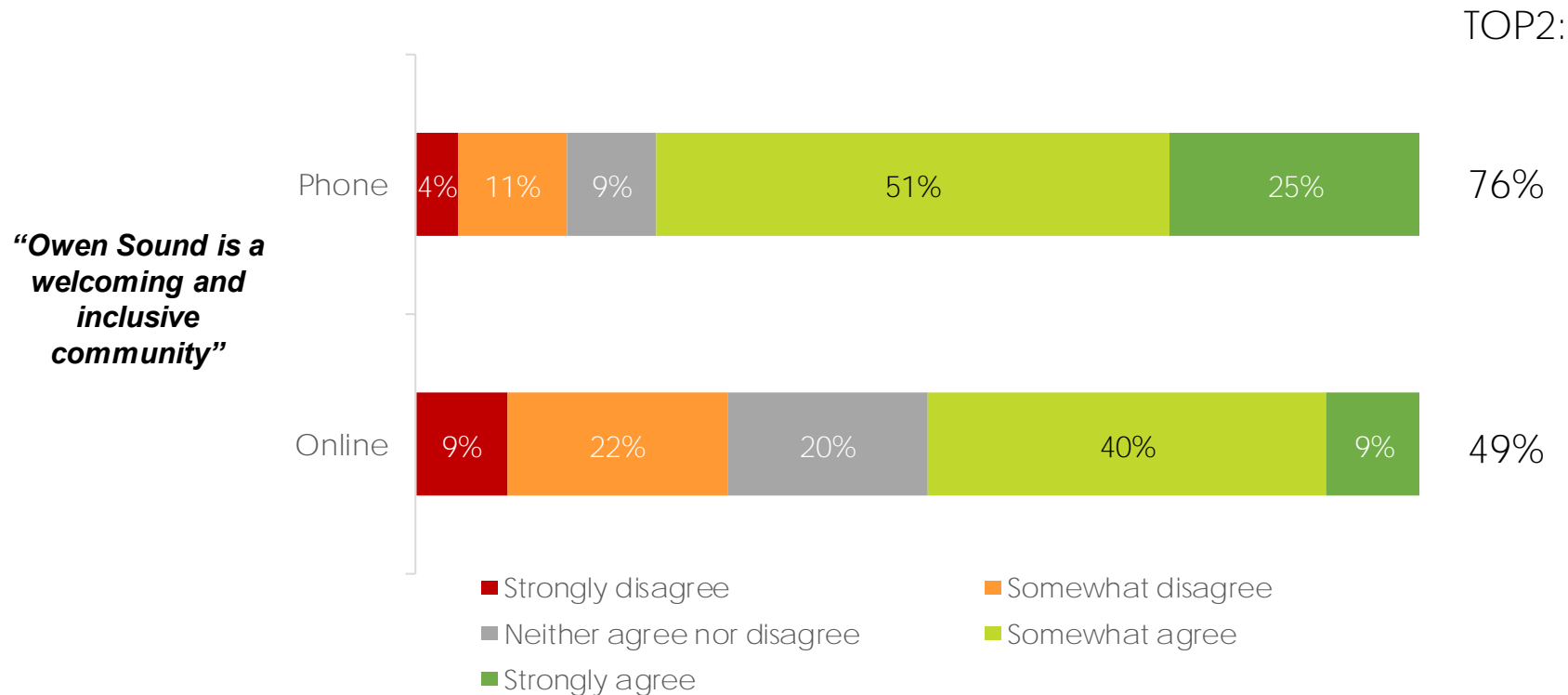
The Net Promoter Score for Owen Sound is lower than the average of 6 Canadian municipalities



- Owen Sound is one of the 3 cities that has an NPS under the average (-2).

Inclusive Community

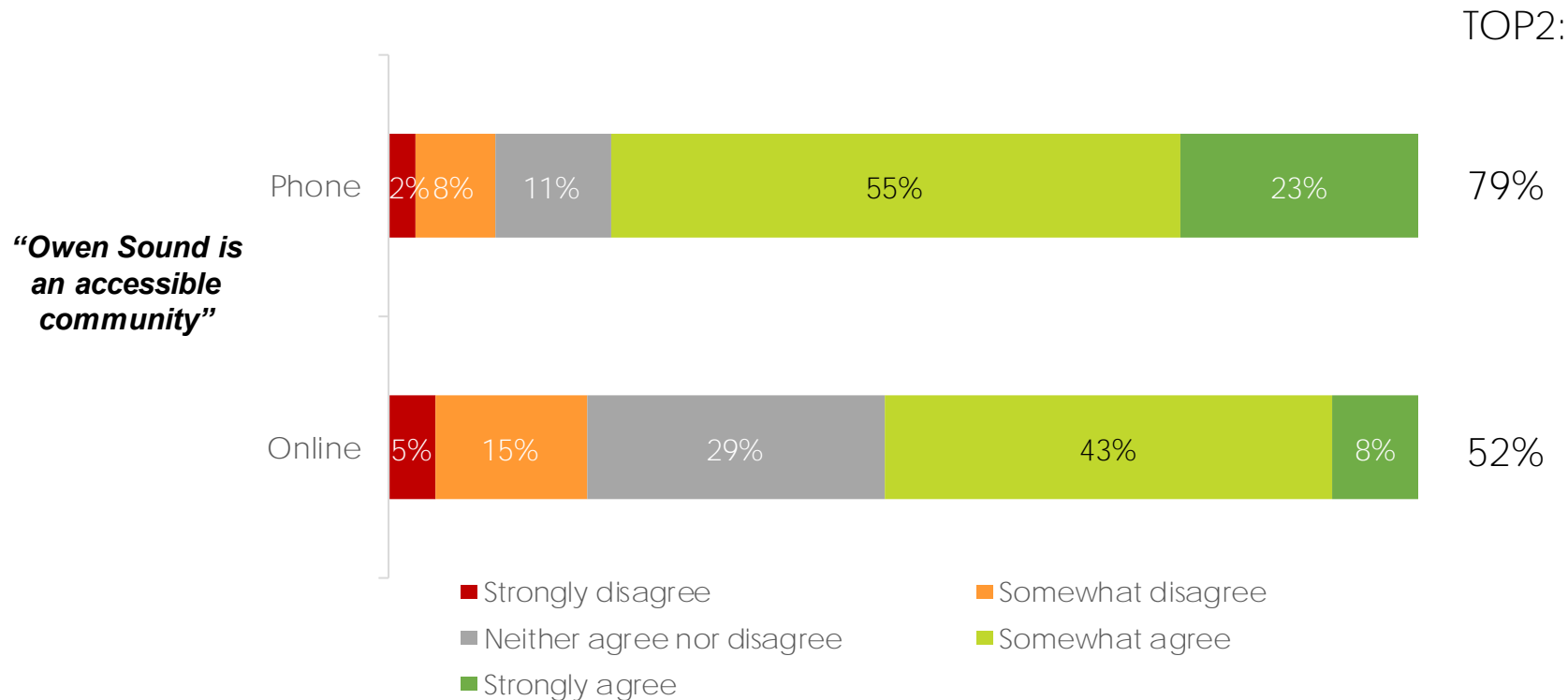
Three quarters of residents (TOP2: 76%) agreed that Owen Sound is a welcoming and inclusive community



- Residents who agreed with this statement were more likely to be:
 - Aged 65+ (TOP2: 85%) than aged 45-54 (TOP2: 70%)
 - High school graduates (TOP2: 87%) than those with a Bachelor’s degree (TOP2: 65%)
- Half of residents (TOP2: 49%) from the online survey agreed with this statement.

Accessible Community

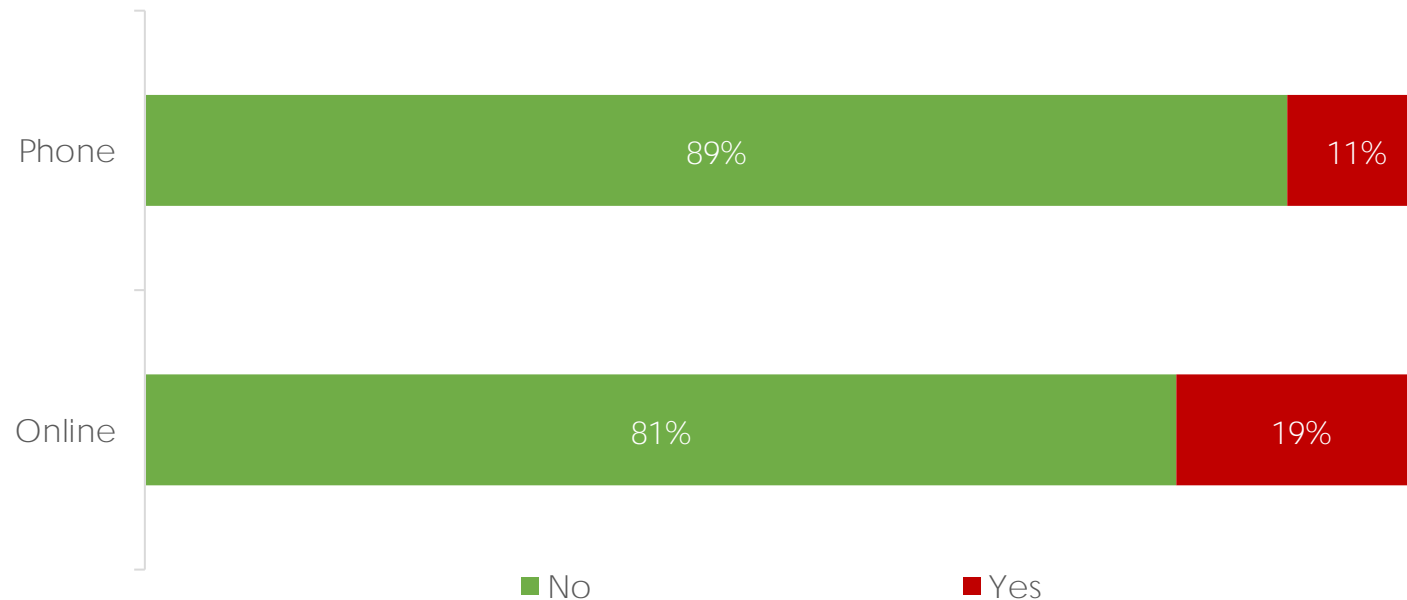
Almost 4 in 5 (TOP2: 79%) residents agreed that Owen Sound is an accessible community



- Residents who agreed with this statement were more likely to:
 - Be aged 65+ (TOP2: 88%) than aged 45-54 and 55-64 (TOP2: 73% for both)
 - Be high school (TOP2: 87%) or college graduates (TOP2: 81%) than those with a Bachelor's degree (TOP2: 66%)
 - Have an income less than \$20K (TOP2: 87%) than have an income from \$60K to \$80K (TOP2: 66%)
- Half of residents (TOP2: 52%) from the online survey agreed with this statement.

Barriers to Access Facilities/Programs/Activities

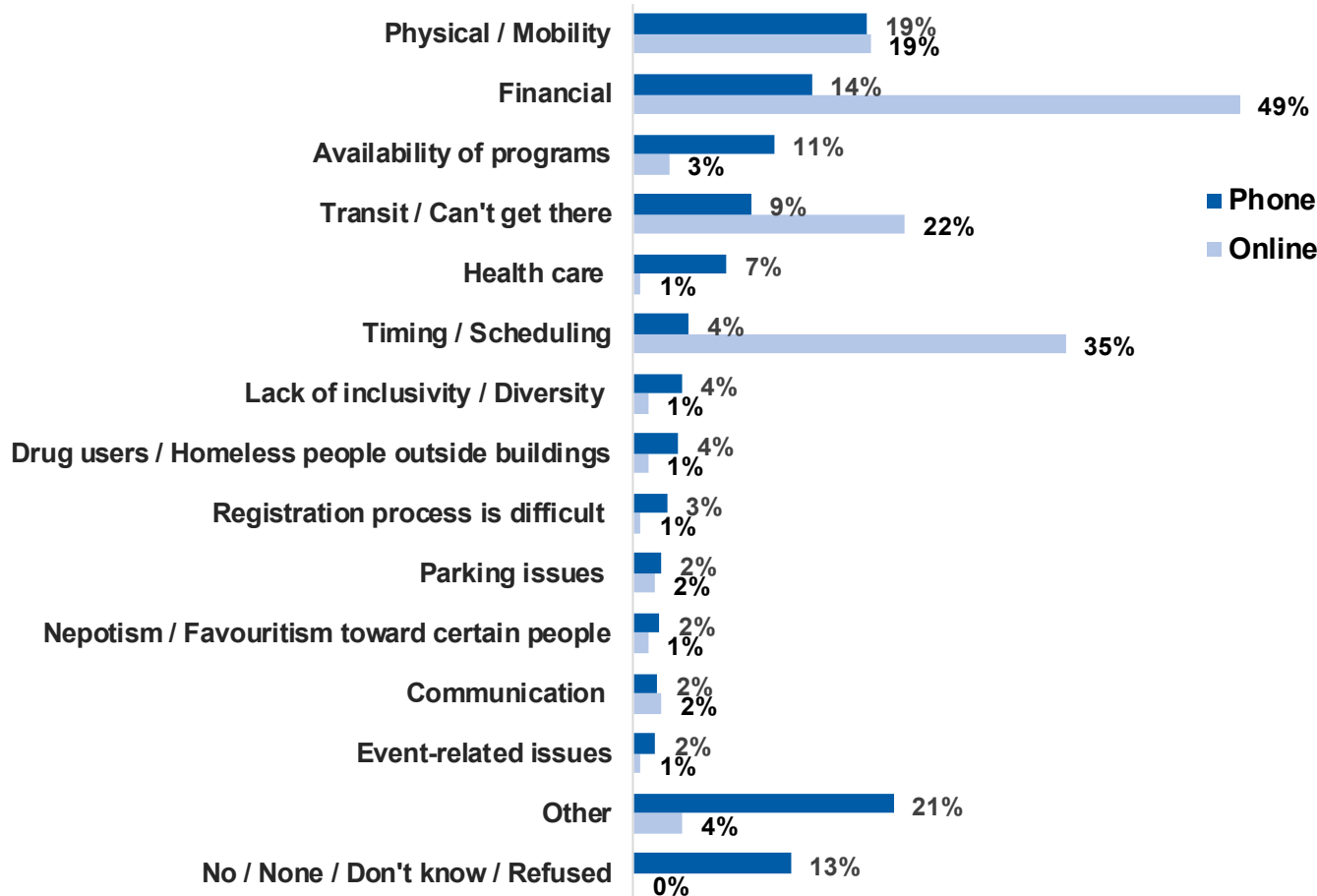
Only 1 in 9 residents (11%) reported to have encountered a barrier to access a city owned facility, program, or activity



- Residents who stated they encountered a barrier were more likely to:
 - Be aged 25-34 (26%) and 45-54 (15%) than aged 55-64 (4%)
- Almost a fifth (19%) of residents from the online survey reported to have encountered a barrier.

Barriers to Access Facilities/Programs/Activities

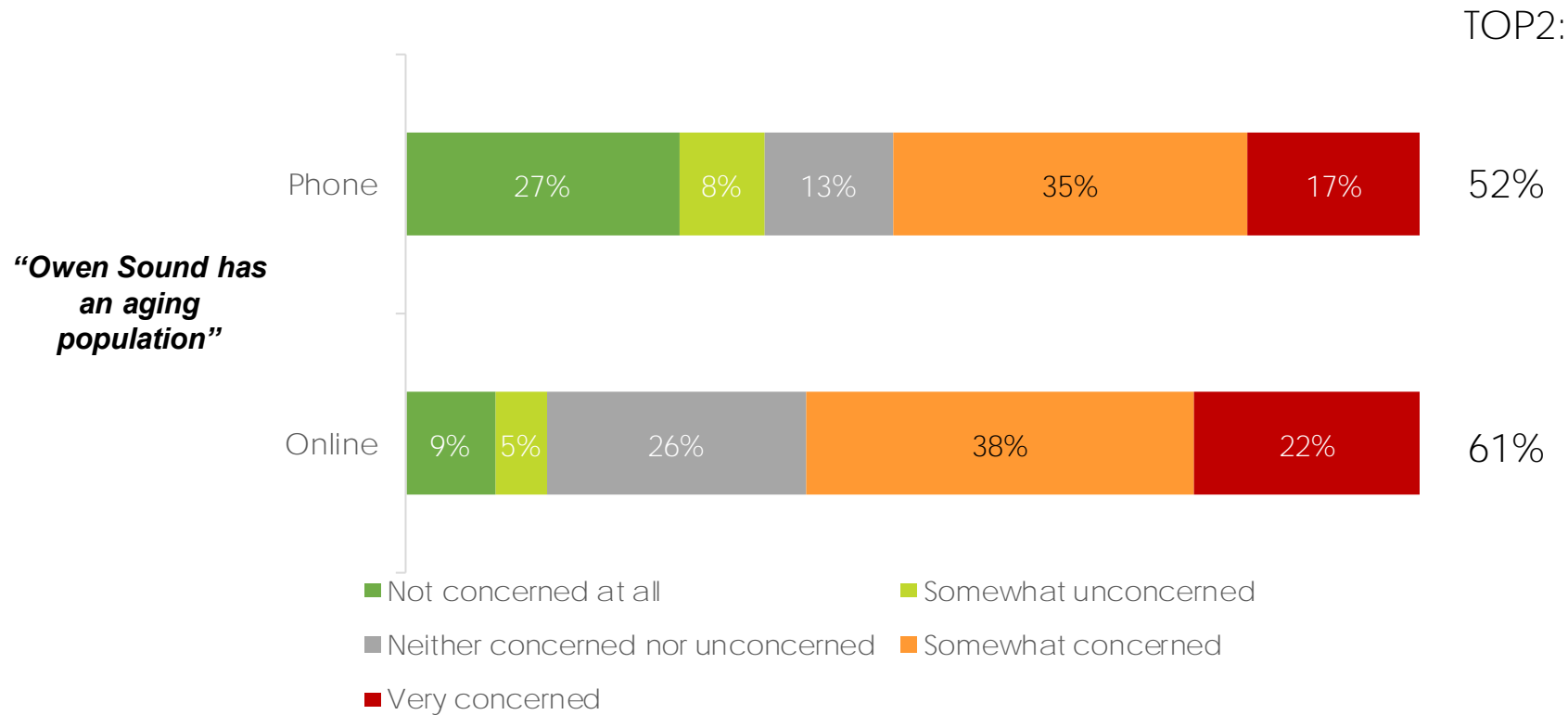
The most reported barriers to accessing any city owned facility, program or activity were related to physical/mobility and financial barriers*



- 11% of residents* who stated to have encountered a barrier, were also asked what barriers they encountered.
- Of these residents, almost a fifth (19%) spontaneously mentioned they encountered physical and/or mobility related barriers to accessing any city owned facility, program, or activity prior to the Covid-19 pandemic.
- Another fifth (19%) from the online survey stated to have encountered a barrier. Financial barriers (49%), timing/scheduling (35%), and transit barriers (22%) were the most mentioned barriers by these residents.

Concern About the Aging Population

Half of residents (TOP2: 52%) were concerned about the aging population in Owen Sound, though over 1 in 4 (27%) are not concerned at all.

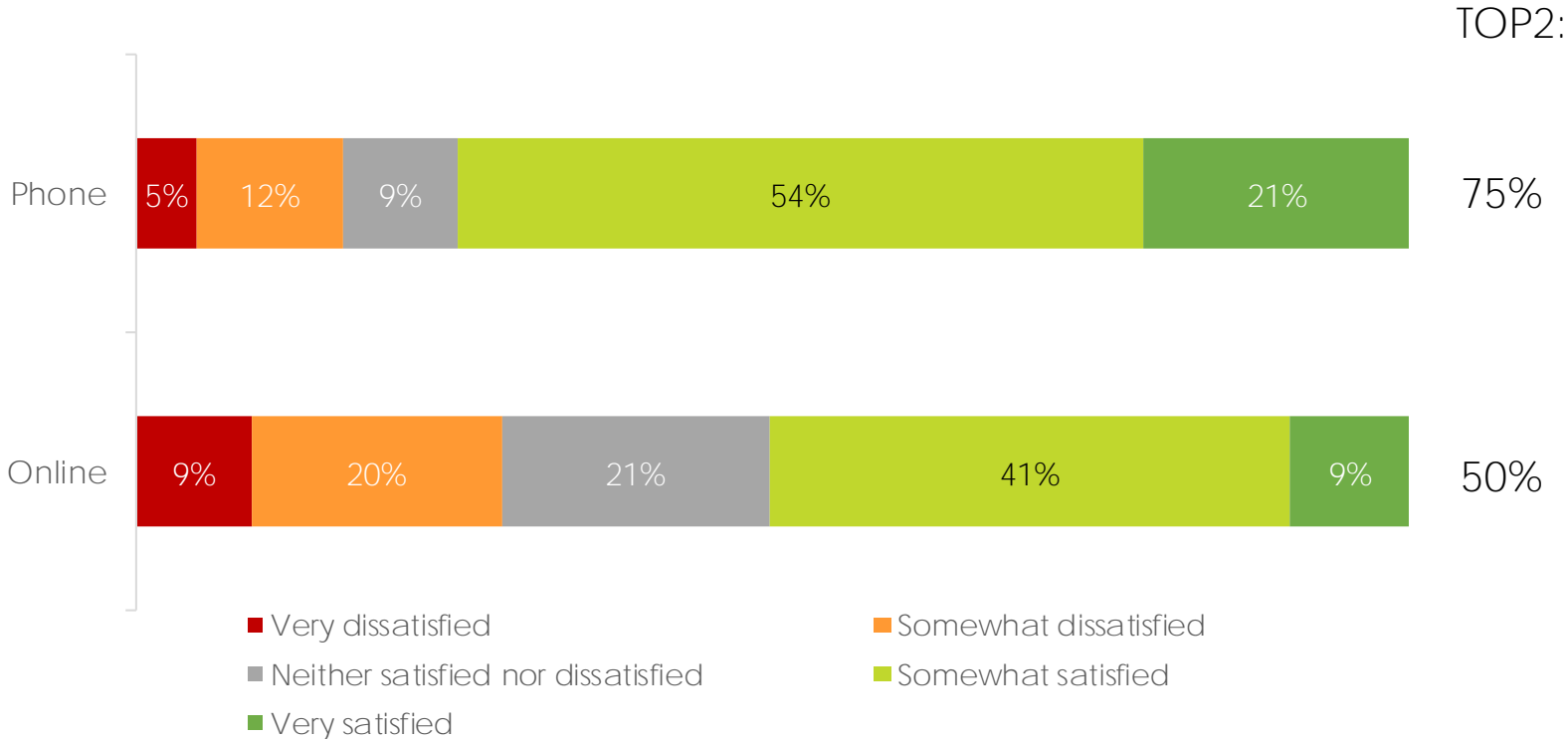


- Residents who are concerned were more likely to:
 - Be aged 45-54 (TOP2: 62%) and 65+ (TOP2: 57%) than aged 35-44 (TOP2: 39%)
 - Have an income from \$60K to \$80K (TOP2: 64%) and from \$80K to \$100K (TOP2: 68%) than have an income less than \$20K (TOP2: 39%)
- 6 in 10 residents (TOP2: 61%) from the online survey were concerned that Owen Sound has an aging population.

Satisfaction with Services

Overall Satisfaction with the Quality of Services

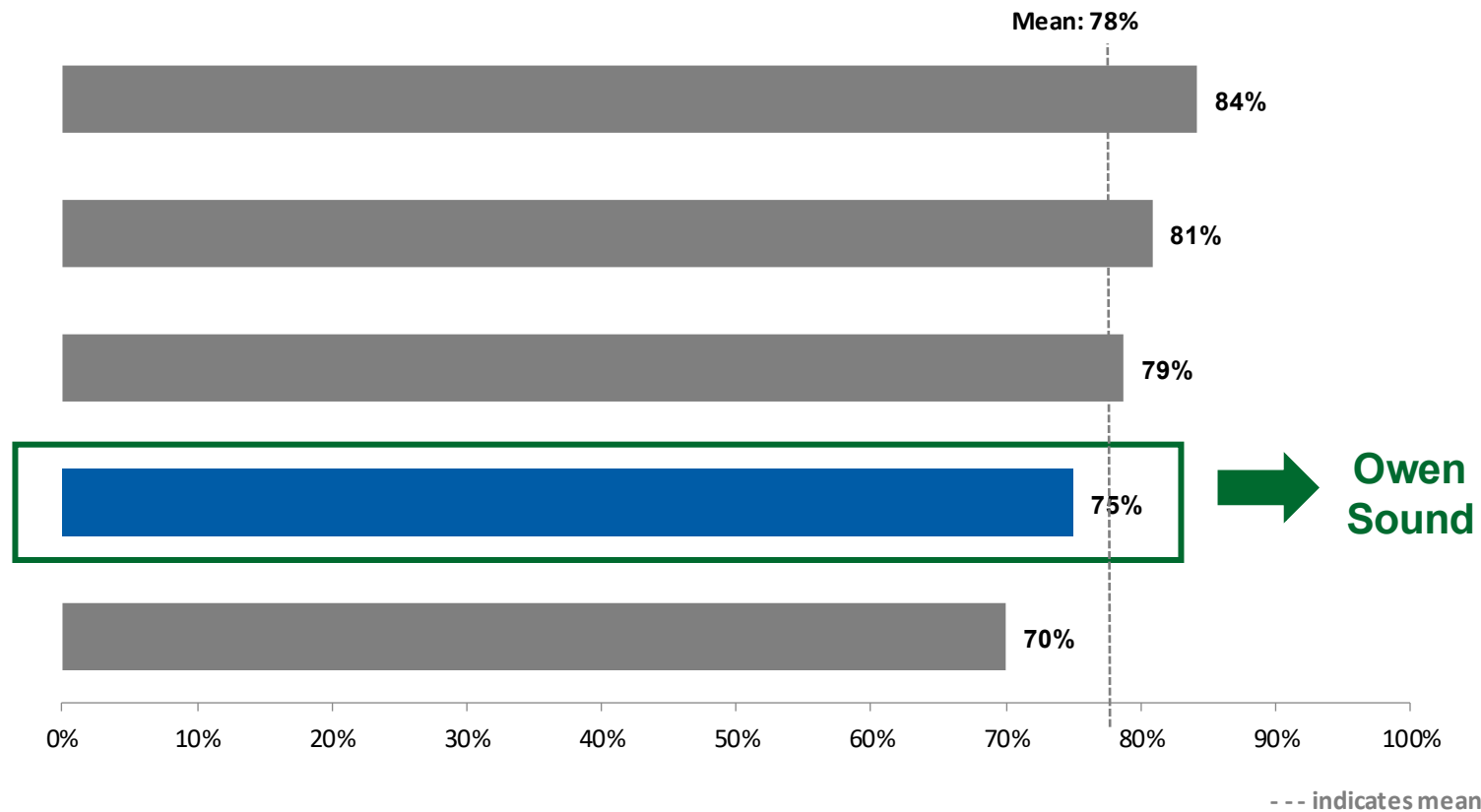
Three quarters of residents (TOP2: 75%) were satisfied with the services delivered by the City of Owen Sound



- Residents who are satisfied with the delivery of services were more likely to:
 - Be aged 55-64 (TOP2: 78%) and 65+ (TOP2: 81%) than aged 25-34 (TOP2: 60%)
 - Have an income from \$40K to \$60K (TOP2: 81%) than have an income from \$60K to \$80K (TOP2: 65%)
- Half of residents (TOP2: 50%) from online survey stated to be satisfied with the overall services delivered by Owen Sound.

Quality of Services – Benchmark (TOP2%)

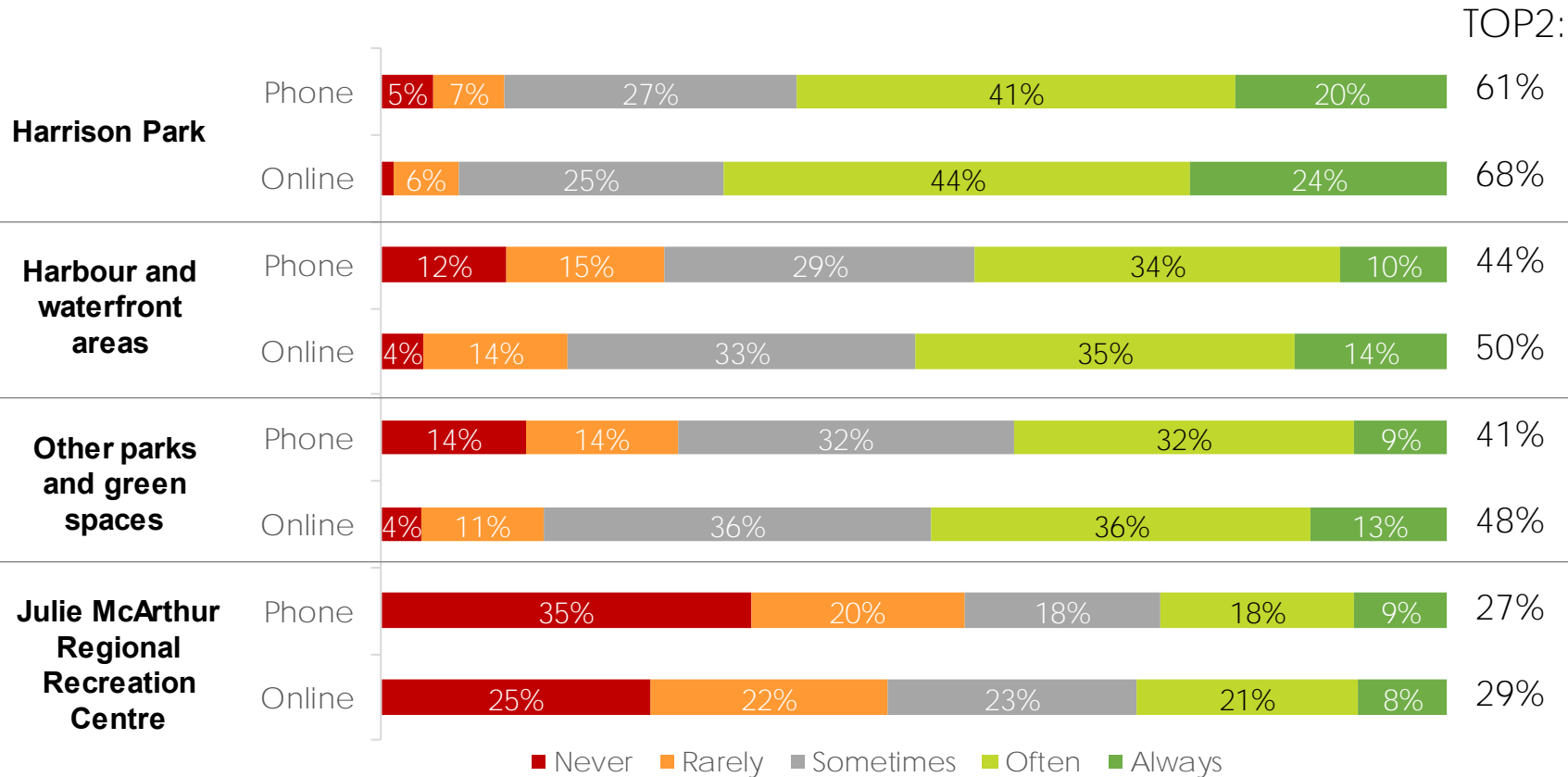
Overall Satisfaction with the services delivered in Owen Sound is close to the benchmark



- The overall satisfaction with the quality of services in Owen Sound is 75%, which is close to the average of 5 Canadian municipalities (78%).

Frequency of the Usage of Services

Harrison Park was the most frequented by residents of Owen Sound prior to the Covid-19 pandemic (TOP2: 61%)



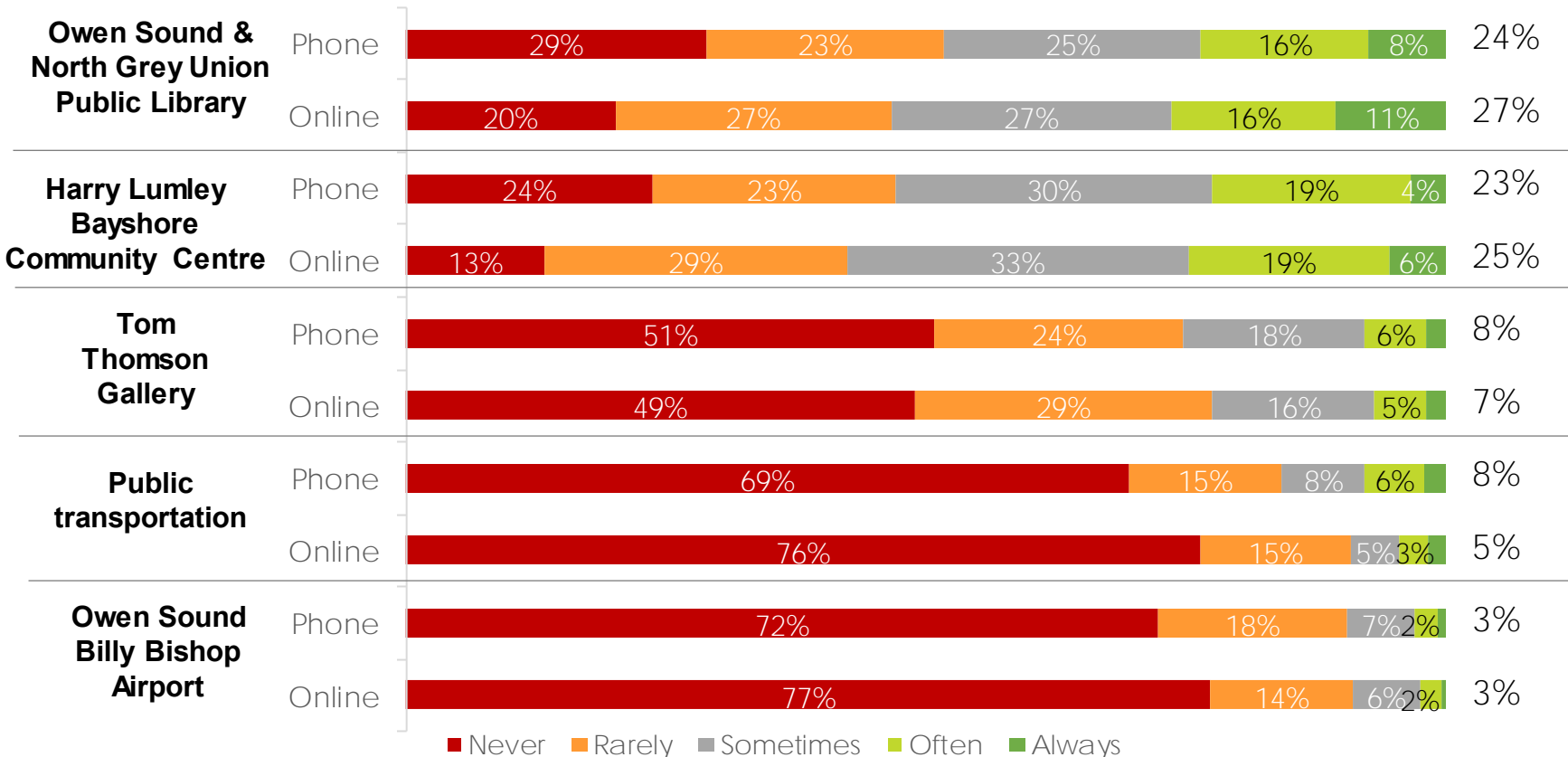
- Prior to the Covid-19 pandemic, Harrison Park (TOP2: 61%), Harbour and Waterfront areas (TOP2: 44%), and other parks and green spaces (TOP2: 41%) were the top 3 recreation areas that residents reported to have used frequently.
- Those who frequented Harrison Park were more likely to:
 - Be female (TOP2: 66%) than male (TOP2: 55%)
 - Own a home (TOP2: 66%) than rent (TOP2: 52%)
 - Have an income from \$40K to \$60K (TOP2: 76%) and \$80K to \$100K (TOP2: 77%) than have an income less than \$20K (TOP2: 43%), \$20K to \$40K (TOP2: 47%), and more than \$100K (TOP2: 55%)

Frequency of the Usage of Services

More than half reported to have never used the Tom Thomson Gallery, Public Transportation, and Billy Bishop Airport

TOP2:

- Prior to the Covid-19 pandemic, Tom Thomson Gallery (BTM2: 75%), public transportation (BTM2: 84%), and Owen Sound Billy Bishop Airport (BTM2: 90%) were the least used services / recreation opportunities by residents.



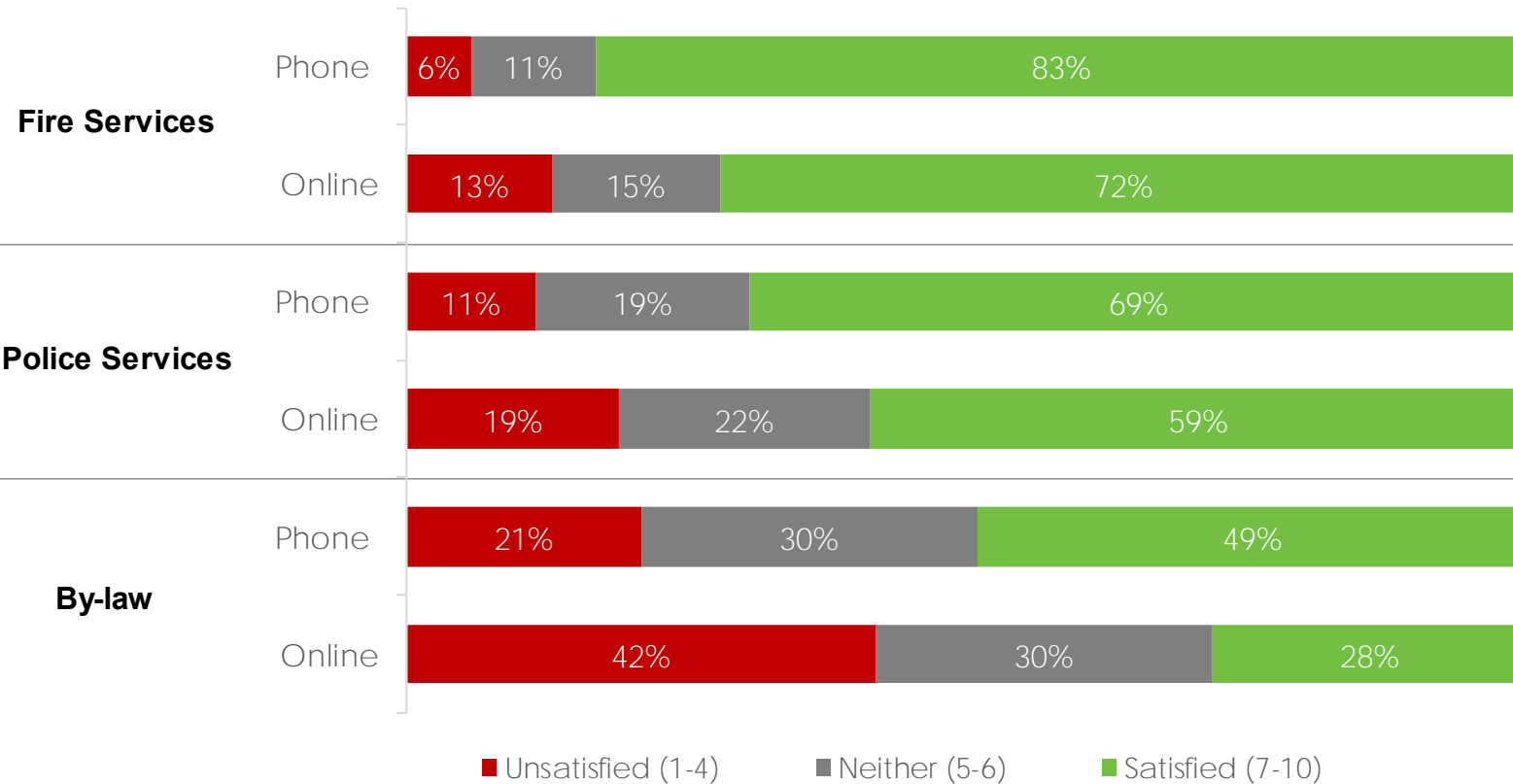
Q8. As you know, the City of Owen Sound provides many services to its residents and businesses. We'd like to ask you about some recreation opportunities or services residents of Owen Sound use. Prior to the Covid-19, please indicate how often you have used each of the following. Starting with...

Framework: All Respondents

Sample size: Phone n = 401 / Online n = 908

Satisfaction with the Services Safe City

The City's fire services is the top Safe City service residents were satisfied with (TOP4: 83)



- Majority were satisfied with fire services (TOP4: 83%), followed by police services (TOP4: 69%).
- Residents were less satisfied with by-law compared to other two Safe City services (TOP4: 49%).

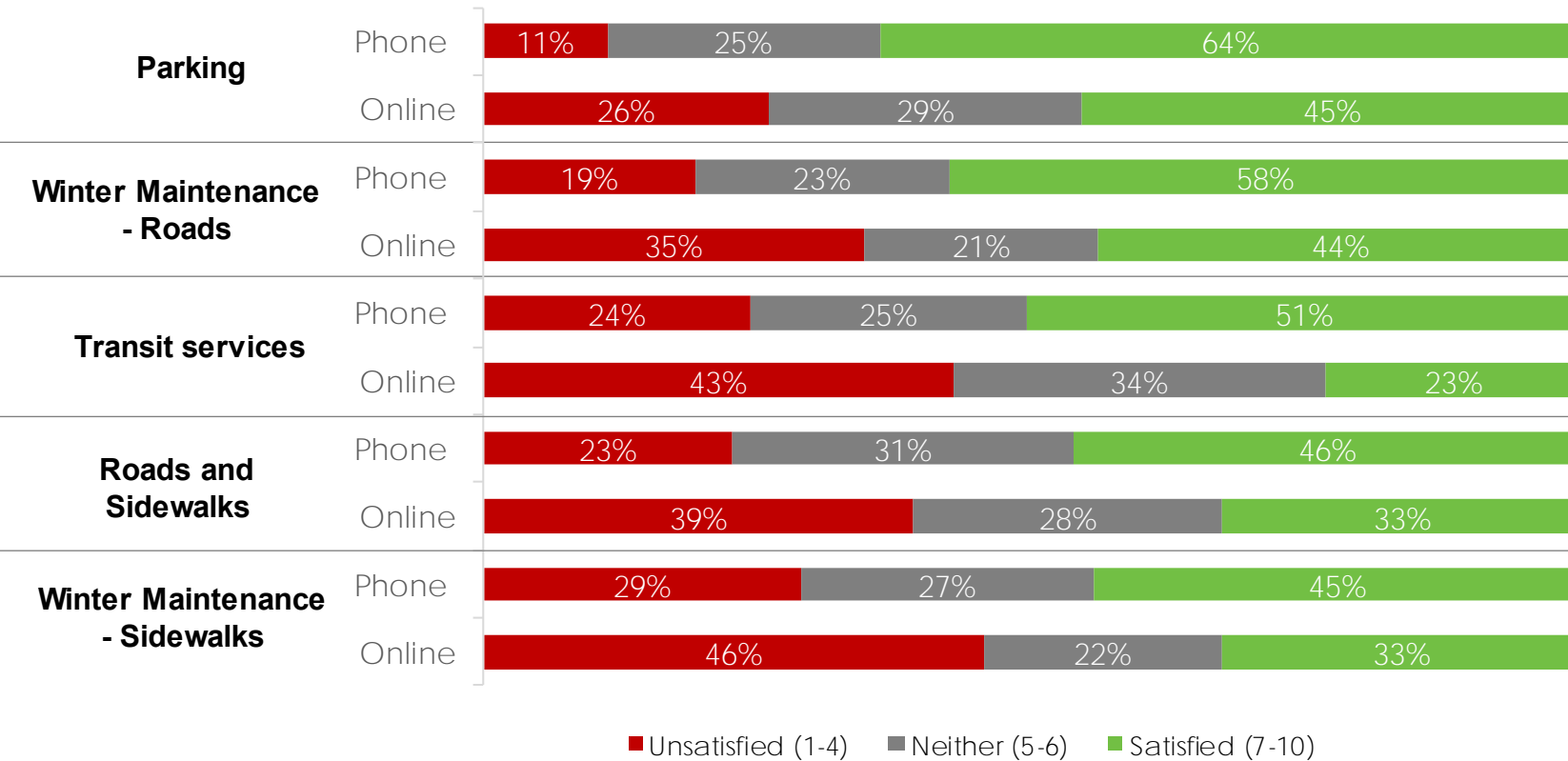
Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 / Online n = 908 (varies per category)

Satisfaction with the Services City that Moves

Almost two thirds (TOP4: 64%) are satisfied with the City's parking services



- In addition to parking services, more than half of residents were also satisfied with winter maintenance-roads (TOP4: 58%) and transit services (TOP4: 51%).
- Whereas less than half reported to be satisfied with roads and sidewalks (TOP4: 46%) and winter maintenance-sidewalks (TOP4: 45%).

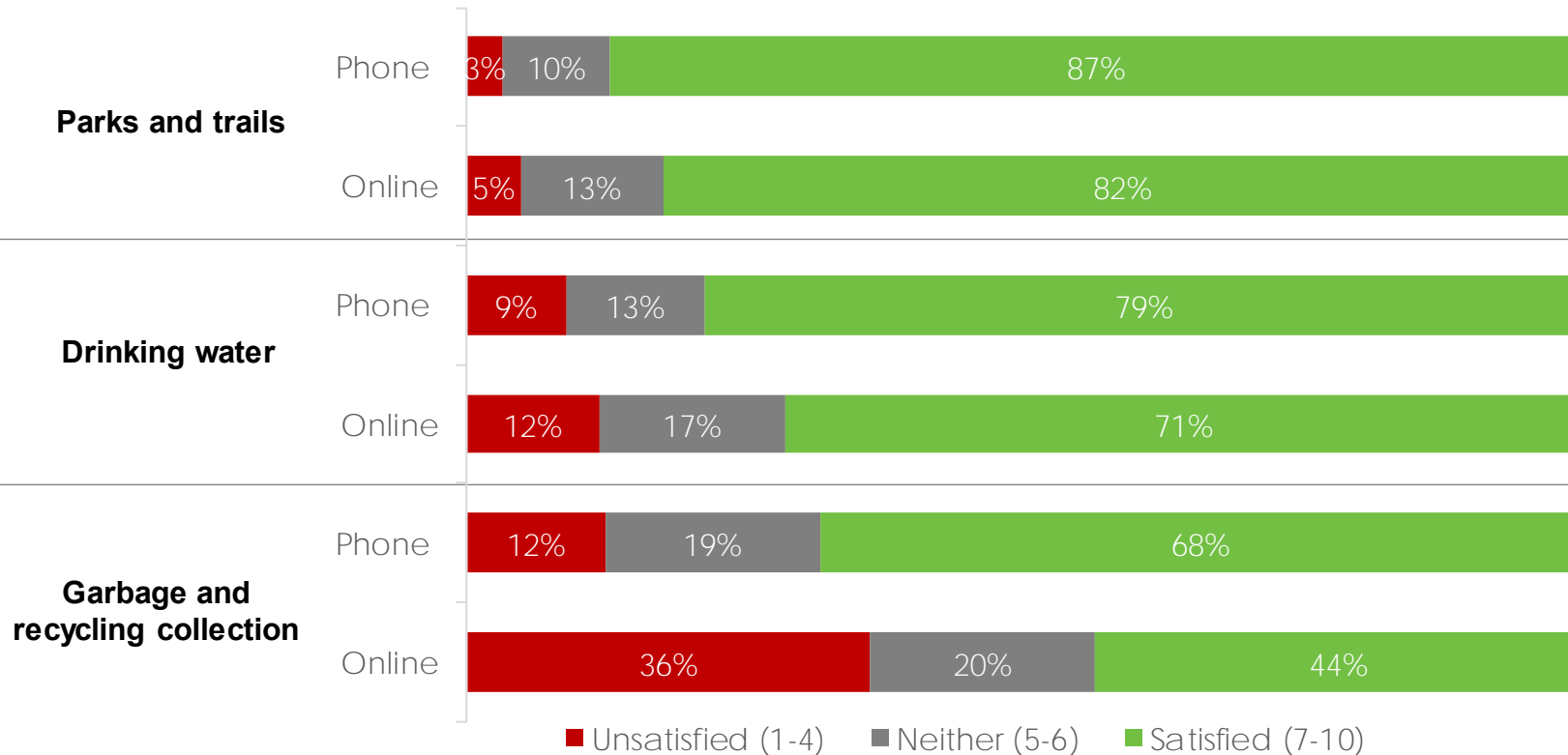
Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 / Online n = 908 (varies per category)

Satisfaction with the Services Green City

Almost 9 in 10 residents (TOP4: 87%) were satisfied with the City's parks and trails

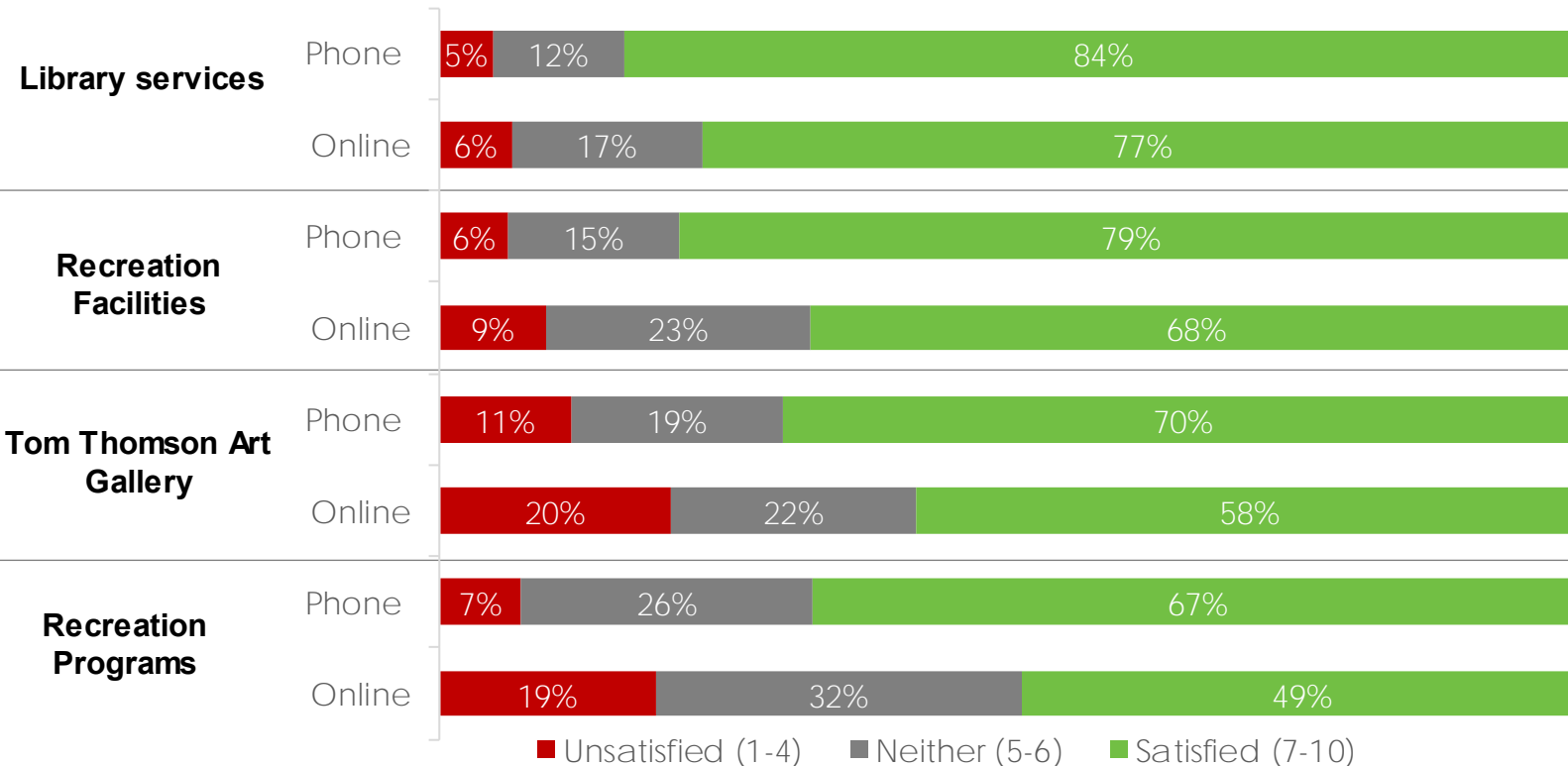


- Majority of the residents were satisfied with Green City services.
 - A vast majority were satisfied with parks and trails (TOP4: 87%)
 - 8 in 10 were satisfied with drinking water (TOP4: 79%)
 - Almost 7 in 10 were satisfied with garbage and recycling collection (TOP4: 68%)

Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...
Framework: All Respondents, excluding "not applicable" and "don't know"
Sample size: Phone n = 401 / Online n = 908 (varies per category)

Satisfaction with the Services City Building

More than 8 in 10 residents (TOP4: 84%) were with the City's library services



- Among the City Building services, library services was the service that residents were satisfied with the most (TOP4: 84%), followed by recreation facilities (TOP4: 79%).

Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 / Online n = 908 (varies per category)

Satisfaction with the Services

All Services

When all services are ranked together, parks and trails topped the list with 87% satisfied (TOP4)

Core Services	Percentage Satisfied (7-10)
Parks and trails	87%
Library services	84%
Fire services	83%
Drinking water	79%
Recreation Facilities	79%
Tom Thomson Art Gallery	70%
Police services	69%
Garbage and recycling collection	68%
Recreation Programs	67%
Parking	64%
Winter maintenance – Roads	58%
Transit services	51%
By-law	49%
Roads and Sidewalks	46%
Winter maintenance - Sidewalks	45%

- **Parks and trails** was ranked highest (TOP4: 87%) in terms of satisfaction of residents, followed by **Library services** (TOP4: 84%) and **Fire services** (TOP4: 83%).
- **Winter maintenance – sidewalks** was ranked last, with only 45% (TOP4) being satisfied with the service.
- **Roads and Sidewalks, by-law, and transit services** all ranked relatively low.

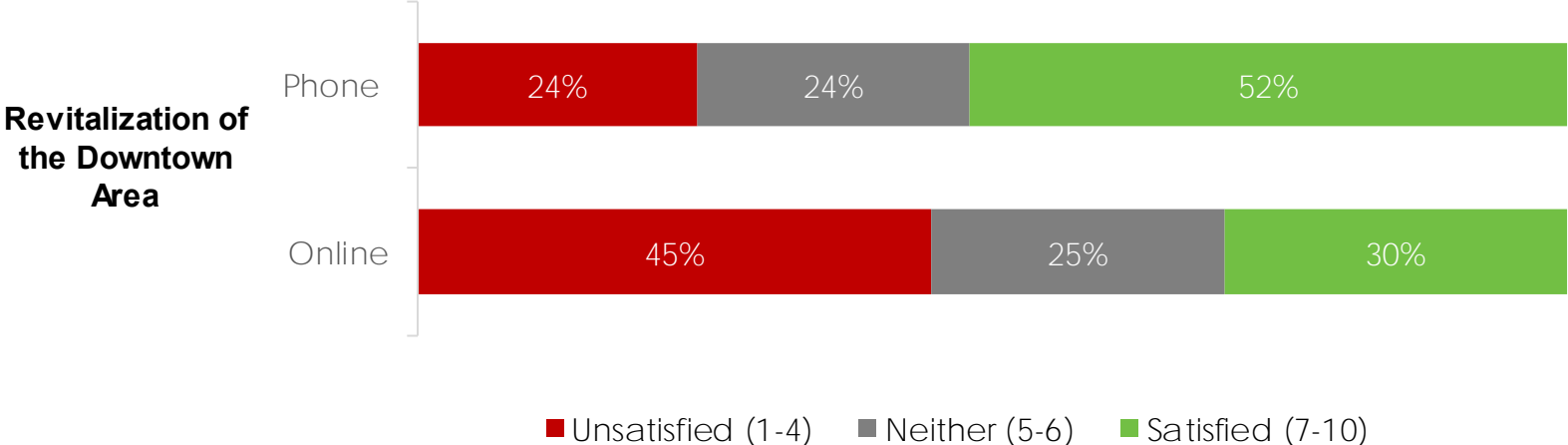
Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following? / Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 / Online n = 908 (varies per category)

Satisfaction with the Revitalization of the Downtown Area

Half of residents (TOP4: 52%) reported satisfaction with the revitalization of the downtown area



- Residents who were satisfied were more likely to be:
 - Female (TOP4: 57%) than male (TOP4: 46%)

Gap Analysis

Interpreting the Gap Analysis

The Gap Analysis in the following slide shows the difference between how satisfied the residents are with each City service and the impact of the services to residents' overall service satisfaction.

- **Impact on overall satisfaction scores** are plotted horizontally across the bottom of the chart (along the X-axis). They are based on a regression analysis that determines how a specific service (“independent variable”) contribute to residents' overall satisfaction with the services (“dependent variable”).
- **Satisfaction scores** are plotted vertically (along the Y-axis). They represent overall stated satisfaction (TOP4%) with each of the individual City services.

As a result of the analysis, city services have distributed among four areas:

Primary Areas for Improvement – services that have highest impact on overall satisfaction, but with lower individual satisfaction scores. This is stated as the primary area for improvement because the regression analysis identifies that these services are the strongest drivers of satisfaction. If the City can increase satisfaction in these areas, this will have the largest impact on overall satisfaction with City services.

Secondary Areas for Improvement – services that have relatively lower impact on overall satisfaction and have lower individual satisfaction scores. This should be the secondary area of focus to improve satisfaction scores.

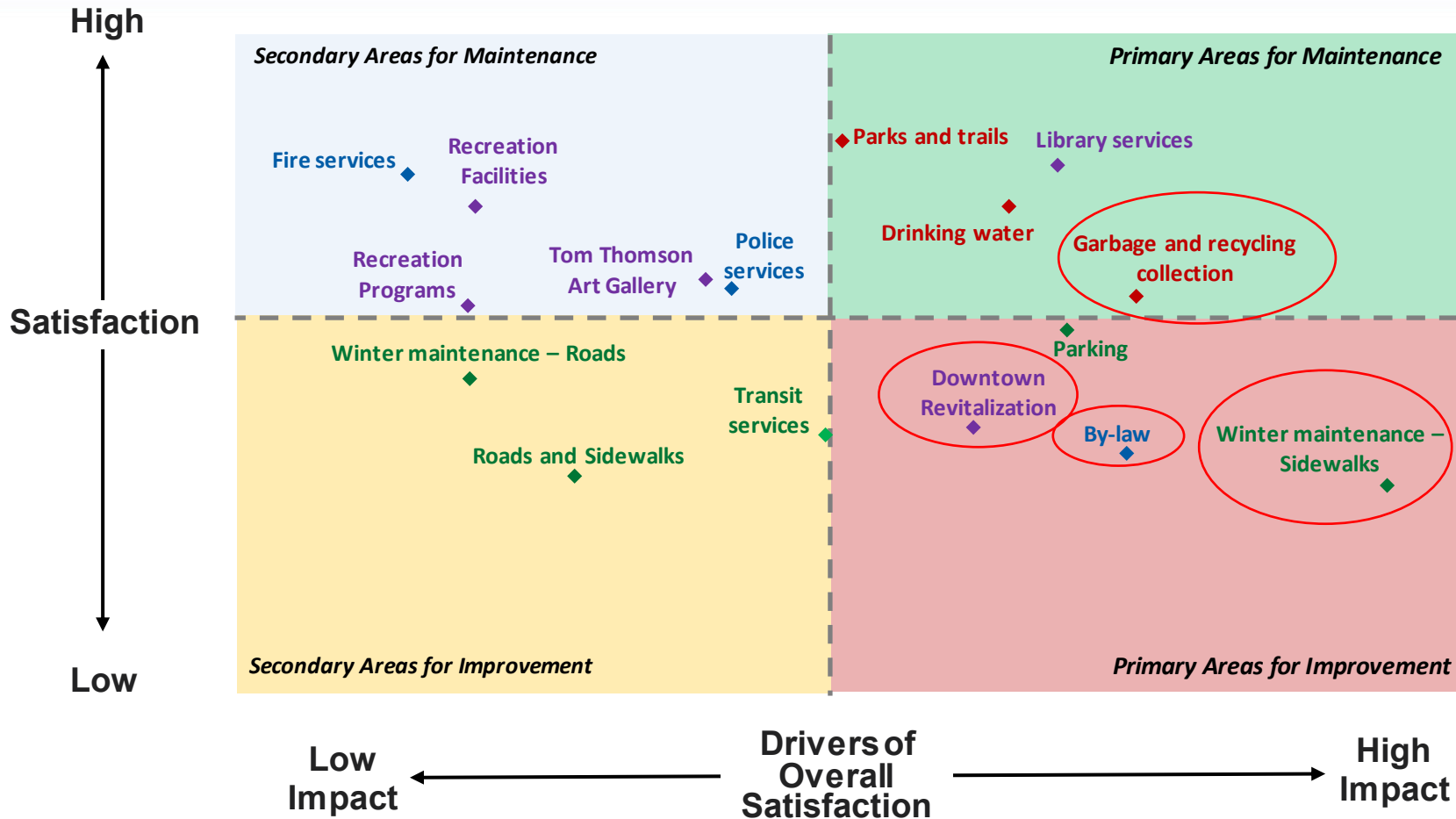
Primary Areas for Maintenance – services that have relatively high impact on overall satisfaction and high individual satisfaction scores. The focus here is on maintaining the current level of satisfaction.

Secondary Areas for Maintenance – services with low impact on overall satisfaction but high individual satisfaction scores. The focus here should be to maintain satisfaction levels.

In the analysis, city services been categorized into four groups and each group has been depicted with the following colours:

- **Safe city** (Fire Services, Police Services, By-law)
- **City that moves** (Winter Maintenance – Roads, Winter maintenance – Sidewalks, Roads and Sidewalks, Parking, Transit services)
- **Green city** (Parks and trails, Drinking water, Garbage and recycling collection)
- **City building** (Recreation Facilities, Library services, Tom Thomson Art Gallery, Recreation Programs, Downtown Revitalization)

Gap Analysis



The services in the **Primary areas for improvement** have relatively lower satisfaction scores but are stronger drivers of satisfaction for the City's overall level of service.

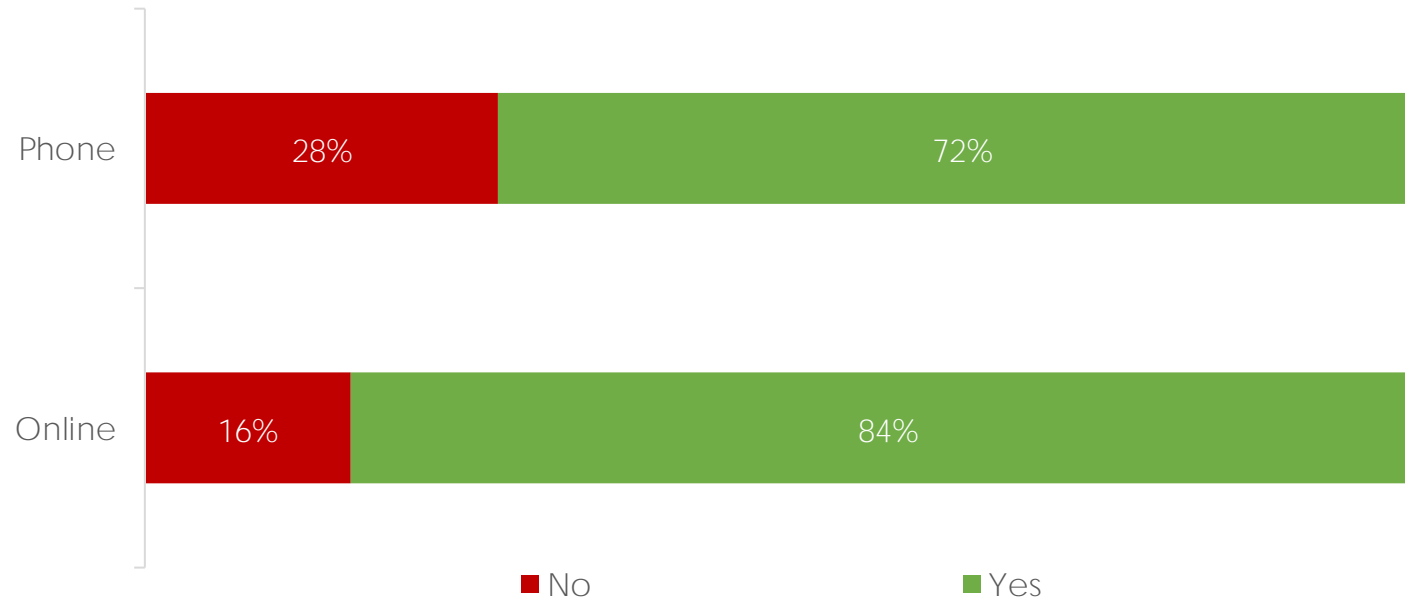
Based on their higher impact on overall satisfaction and lower individual scores for satisfaction, the major services to focus on for each service group are:

- **By-law** in Safe City
- **Winter maintenance-Sidewalks** in City that moves
- **Garbage and recycling collection** in Green city
- **Downtown revitalization** in City Building

Communication

Live Council Meetings Awareness

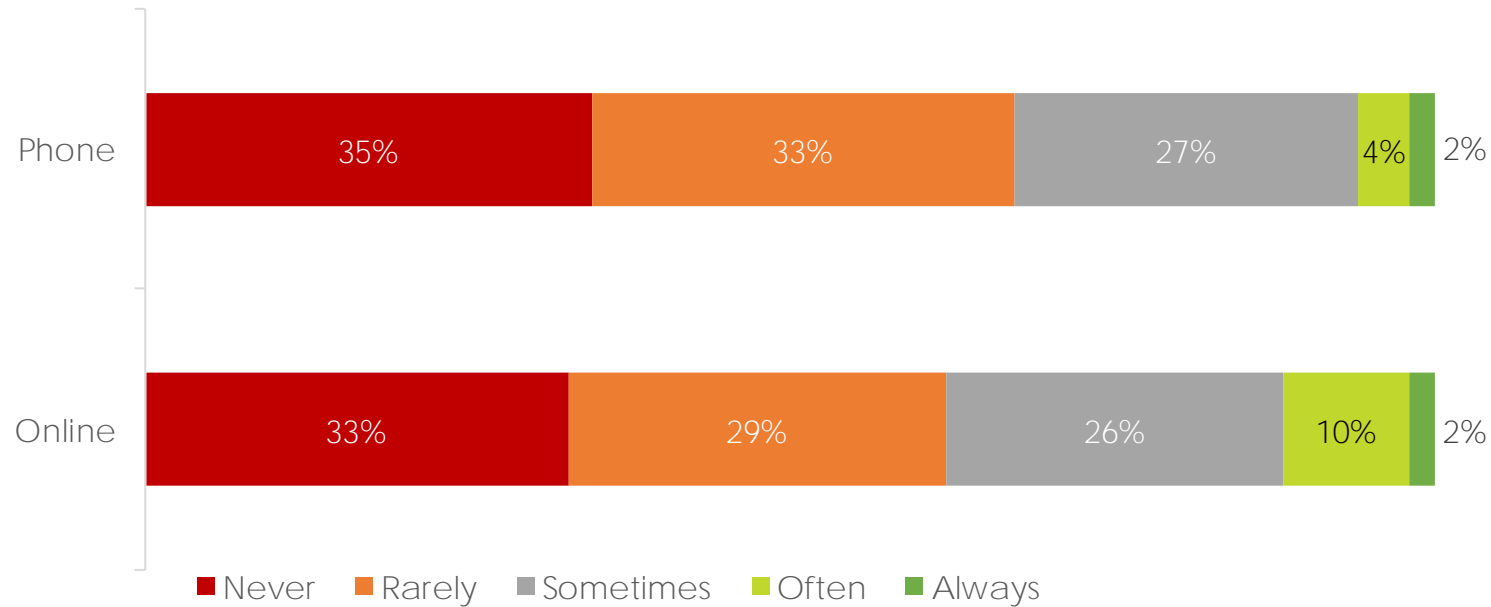
Around 7 in 10 (72%) are aware that they can watch live council meetings on Rogers cable or online



- Residents who are aware are more likely to:
 - Be aged 45-54 (81%) or 65+ (83%) than aged 25-34 (59%)
 - Have completed a University Bachelor's degree (82%) than be a high school graduate (66%)
 - Own a home (81%) than rent their home (59%)
 - Have an income of \$40K to \$60K (77%), \$60K to \$80K (79%), \$80K to \$100K (85%), and \$100K+ (72%) than earn less than \$20K (49%)

Live Council Meetings Frequency

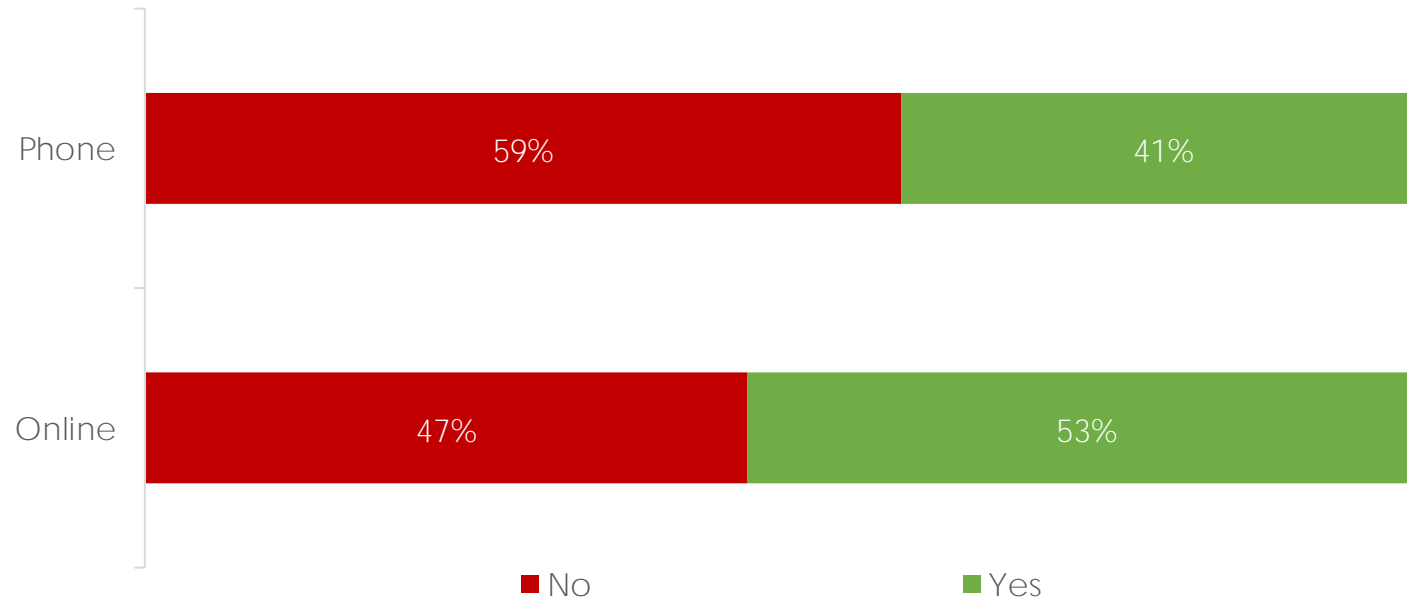
Of those who are aware of the live council meetings on Rogers cable or online, more than two thirds (68%) have never or rarely watched these meetings



- A third (33%) of residents rarely watch live council meetings, while a slightly smaller proportion (27%) watch them sometimes.
- Around one third (35%) of residents have never watched a live council meeting on Rogers cable or online.

City Staff Interaction

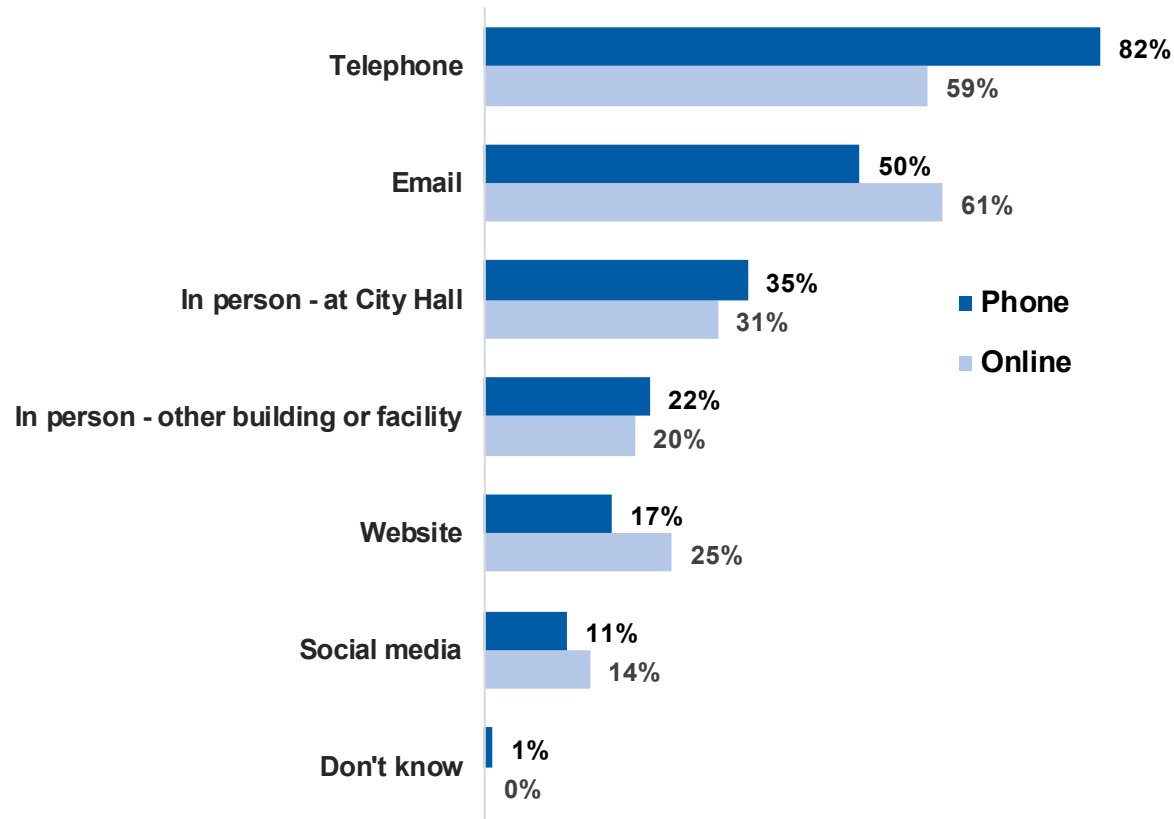
Around 2 in 5 (41%) residents have interacted with or contacted City of Owen Sound staff in the past 12 months



- Residents who have contacted the City are more likely to:
 - Be aged 35-44 (55%) or 45-54 (59%) than be aged 65+ (36%)
 - Have a College diploma (45%) or a University Bachelor's degree (51%) than be a high school graduate (28%)
 - Own their home (47%) than rent their home (32%)
 - Have an income of more than \$100K (57%) than have an income of less than \$20K (36%) or \$20K to \$40K (32%)

City Staff Interaction Communication Methods

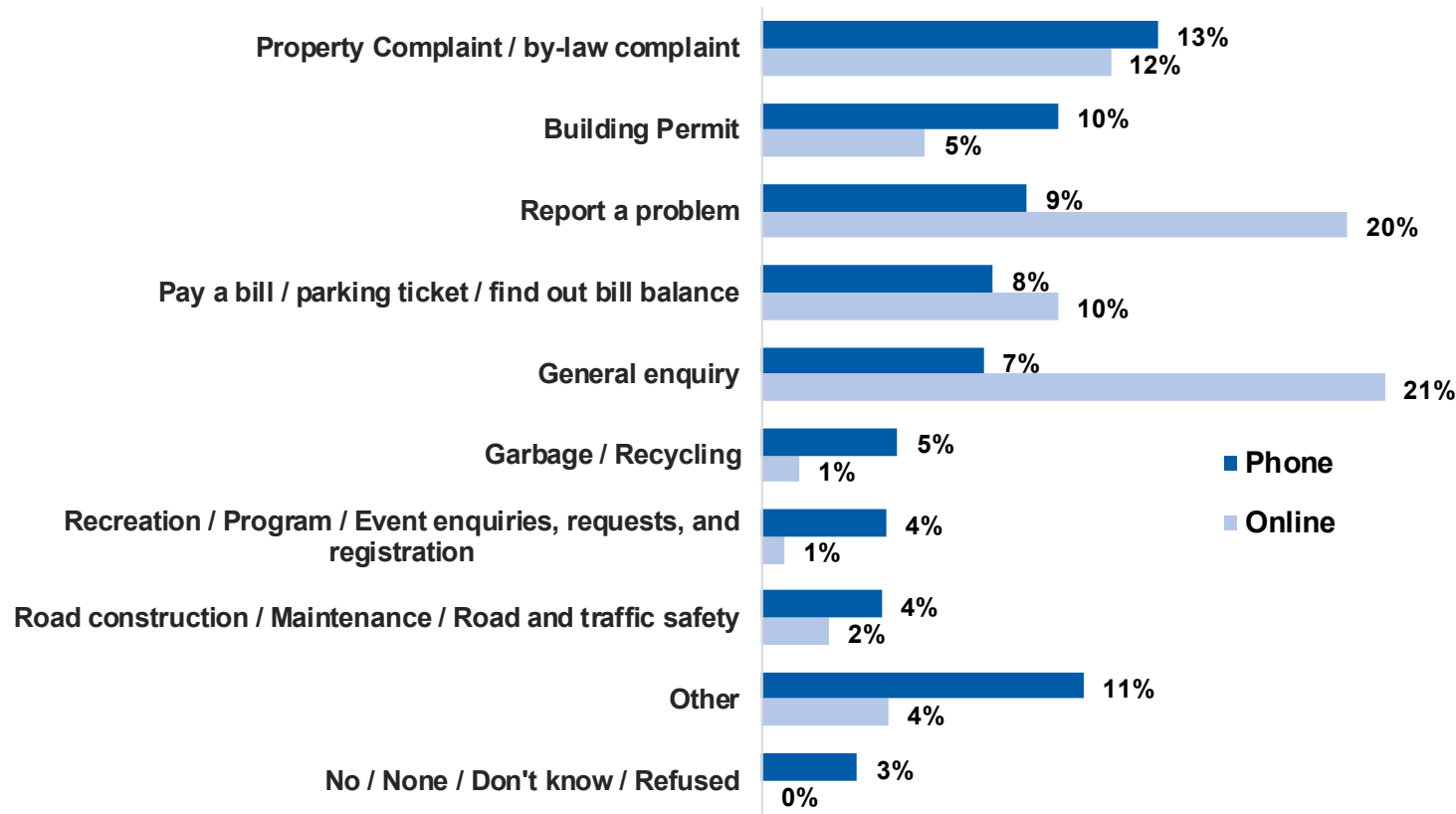
Residents most commonly communicated with City staff by telephone (82%), followed by e-mail (50%)



- Around 4 in 5 (82%) residents have contacted the City via telephone.
- Half of residents (50%) have communicated with the City via email.
 - Those who contacted by email are more likely to be aged 45-54 (60%) than be aged 65+ (38%)

City Staff Interaction Main Reason

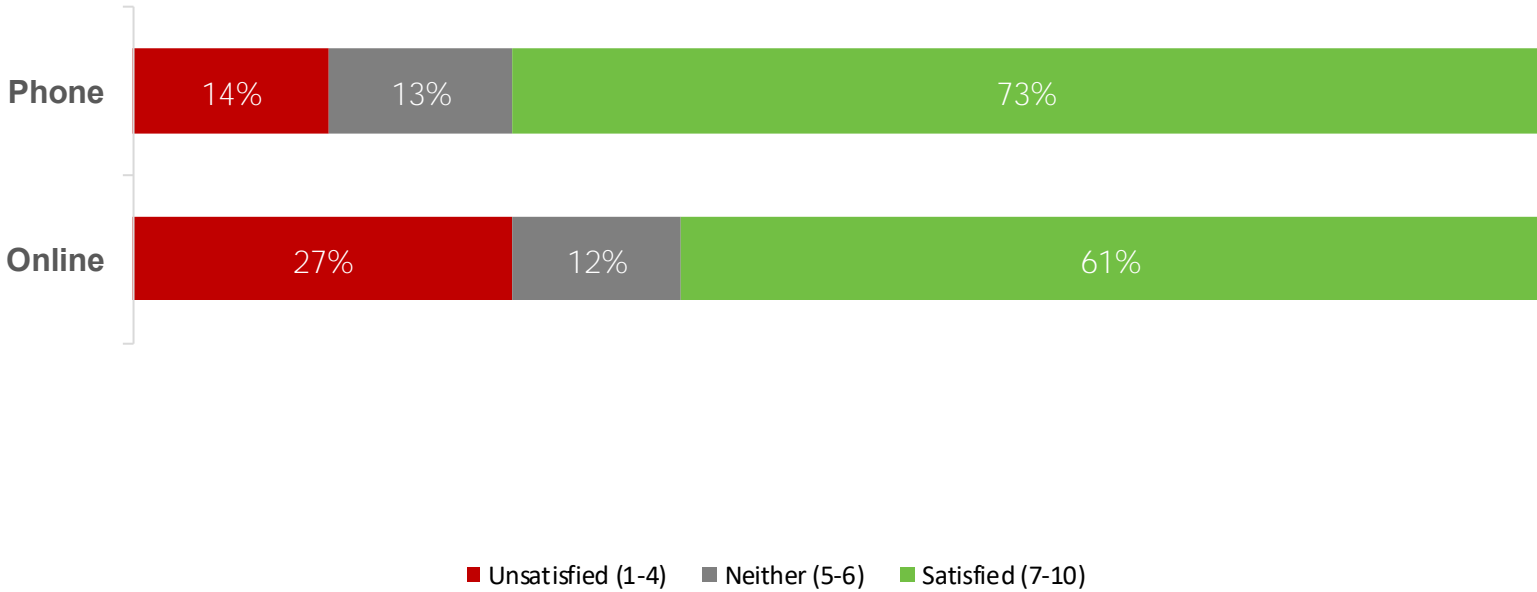
Residents most commonly contacted the City to make a property/by-law complaint (13%), inquire about building permits (10%), or report a problem (9%)



- The top reasons residents contacted the City were:
 - Making a property/by-law complaint (13%)
 - Inquiring about building permit (10%)
 - Reporting a problem (9%)
 - Paying a bill/ticket (8%), and
 - General enquiries (7%)
- Residents who contacted the City to make a property or by-law complaint are more likely to be aged 65+ (26%) than be aged 45-54 (7%).

City Staff Interaction Satisfaction

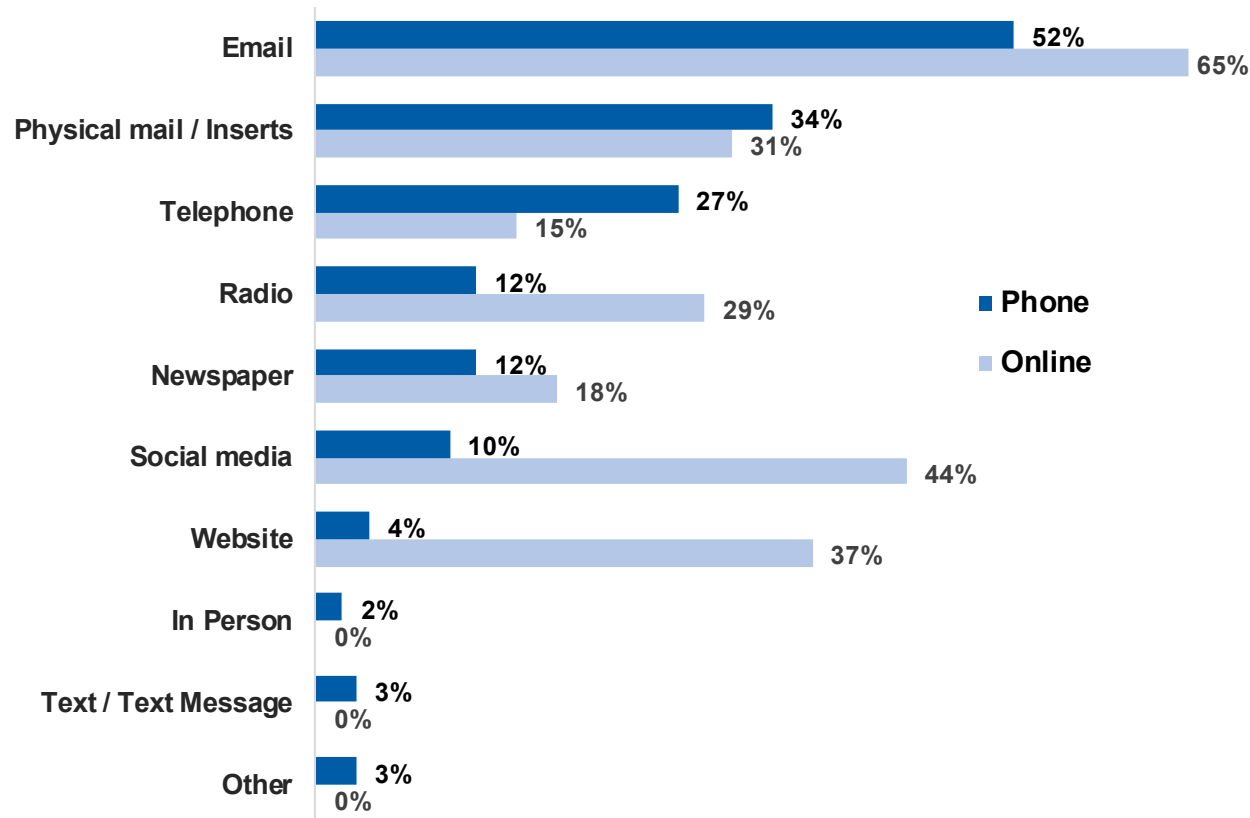
Three quarters (TOP4: 73%) of residents are satisfied with the quality of their most recent interaction with a City staff



- Of residents who have interacted with or contacted City staff, majority (73%) stated they were satisfied with the quality of the service delivery.

Preferred Communication Methods

Residents most commonly prefer to receive communications from the City by e-mail (52%), followed by physical mail (34%) and telephone (27%)

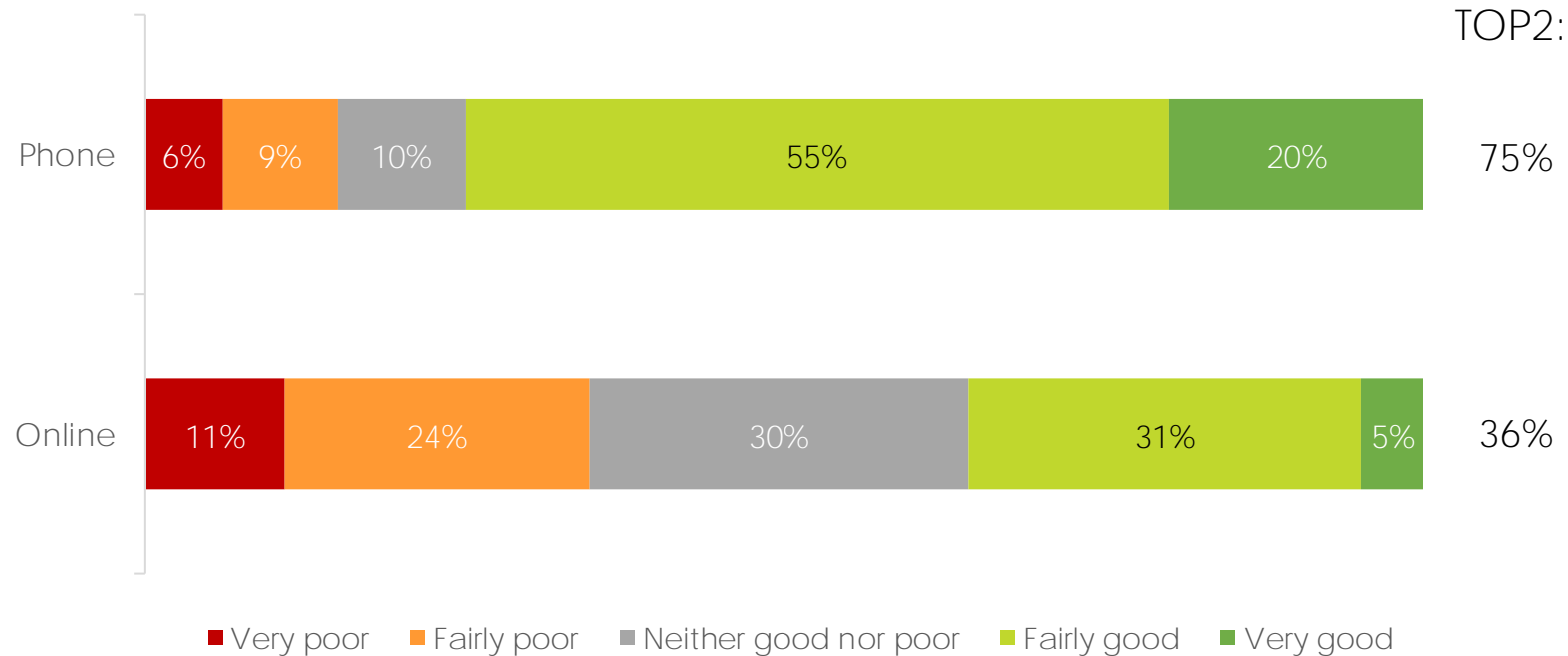


- Residents who prefer to receive e-mail communications are more likely to:
 - Be aged 25-34 (68%) or 45-54 (69%) than aged 55+ (55-64, 43%; 65+, 38%)
 - Have a University Bachelor's degree (67%) than have completed high school (43%)
 - Have an income of more than \$100K (67%) than \$40K to \$60K (44%)
- Residents who prefer to receive physical mail are more likely to:
 - Be aged 55+ (55-64, 40%; 65+, 42%) than be aged 45-54 (24%)
 - Have an income of \$40K to \$60K (40%) than an income of more than \$100K (23%)

Spending and Taxation

Value for Tax Dollars

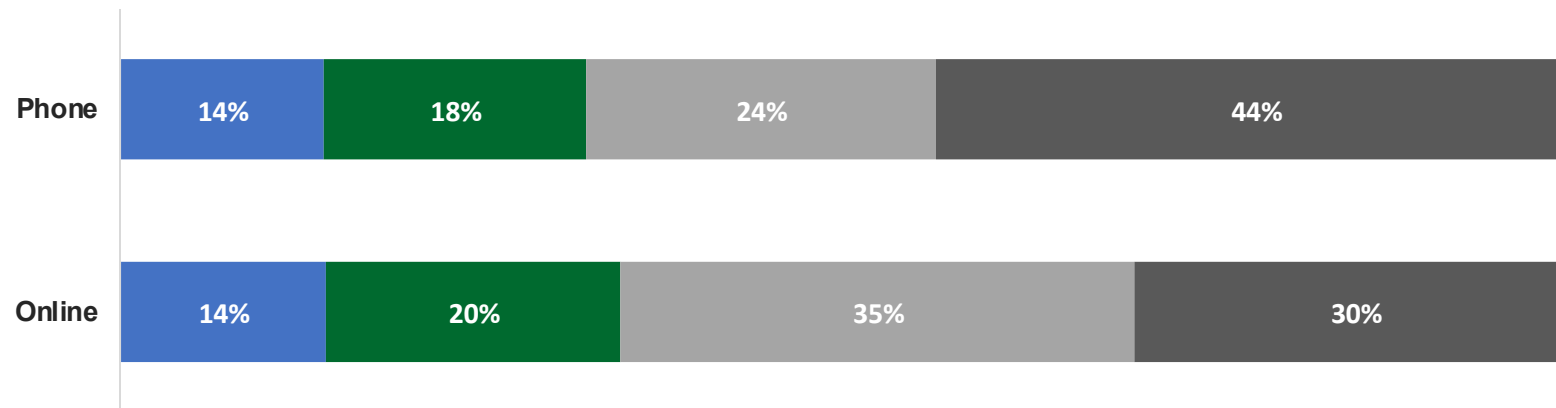
Three quarters (TOP2: 75%) of residents said they received good value of city programs and services for their tax dollars



- Residents who said they receive good value of services for their tax dollars are more likely to:
 - Be aged 55-64 (TOP2: 83%) and 65+ (TOP2: 84%) than those aged 35-44 (TOP2: 59%)
 - Have an income of less than \$20K (TOP2: 91%) than those who have an income higher than \$40K (TOP2: ranging from 66% to 80%)

Balancing Cost and Taxes

In order for the City to balance cost of services with taxation, residents prefer to maintain taxes or reduce services and programs (44%)

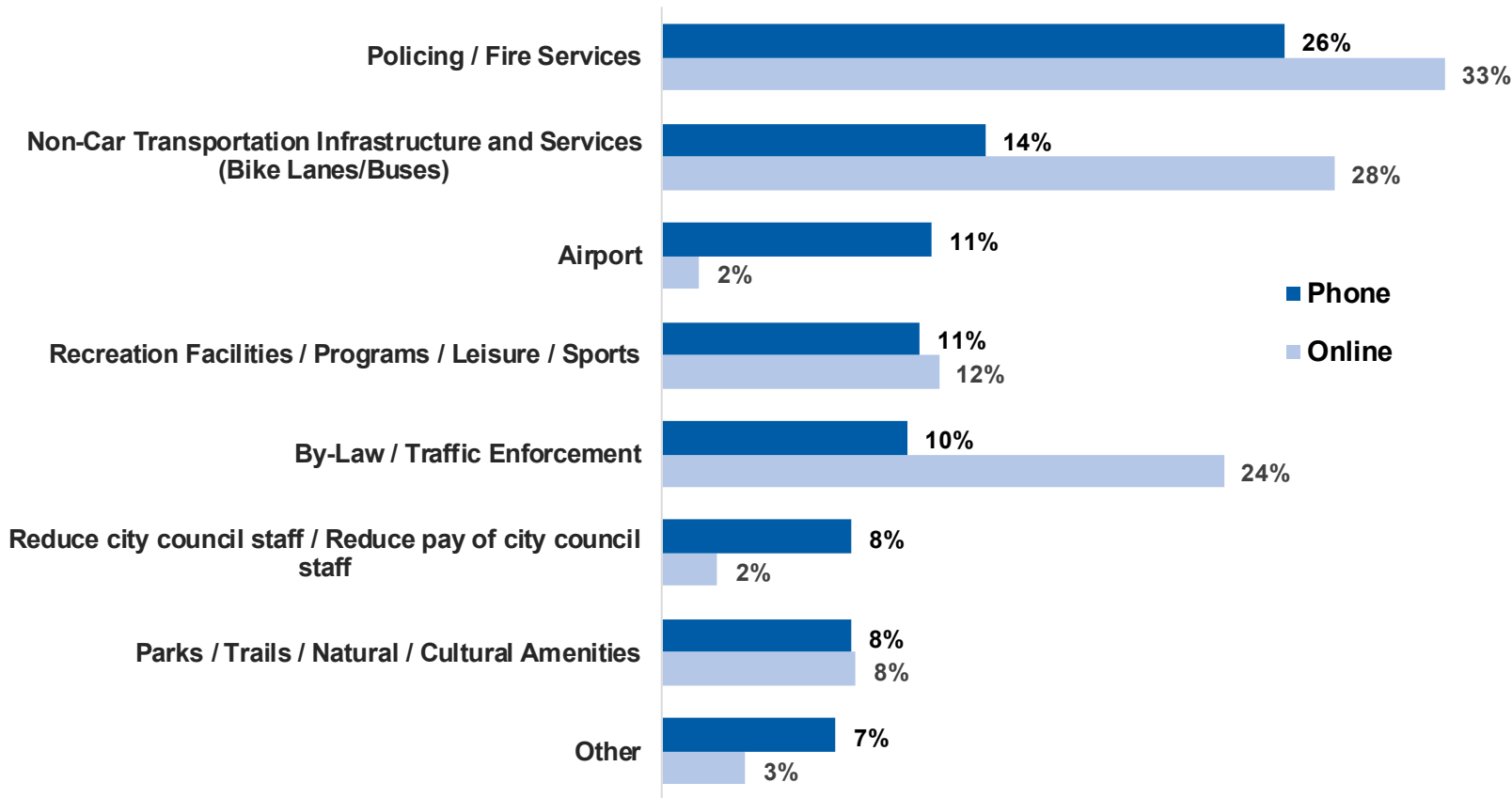


- Increase taxes to expand/improve capital projects
- Increase taxes to expand/improve services and programs
- Increase user fees to expand/improve services and programs, while maintaining taxes
- Maintain taxes for services and programs or reduce services and programs

- Residents who prefer to maintain taxes or reduce services and programs are more likely to:
 - Be aged 65+ (56%) than be aged 35-44 (35%) and 45-54 (33%)
 - Have a college diploma (47%) than have a University Bachelor's degree (31%)
 - Have an income of \$40K to \$60K (56%) than have an income of \$40K to \$100K (changing from 29% to 39%)

Reducing Services

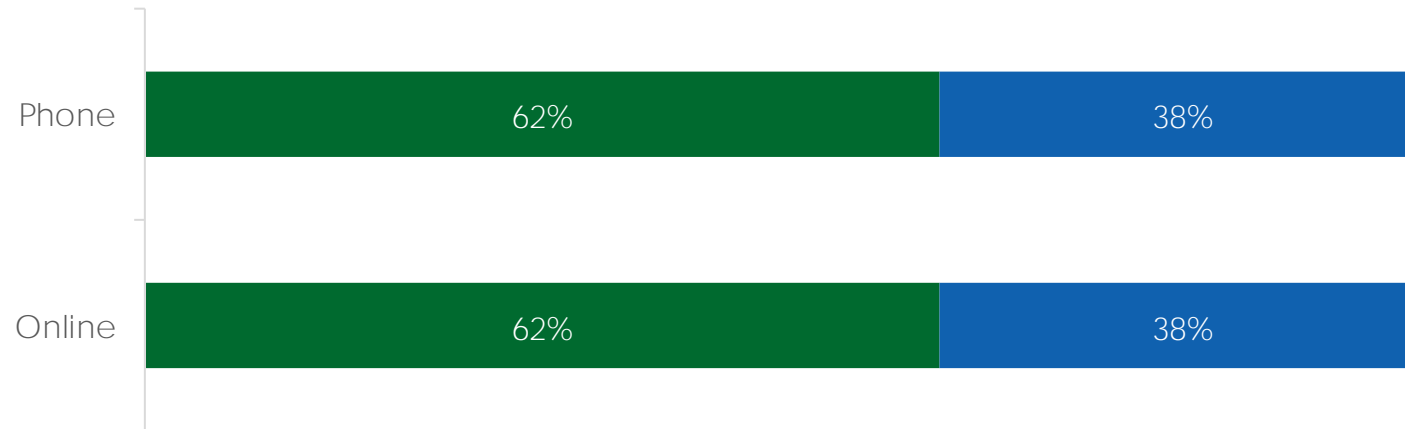
Of respondents who provided an opinion on which services they would reduce in order to maintain taxes, the plurality (26%) said to reduce policing and fire services



- Residents who selected they would want to maintain taxes or reduce services were asked which service(s) they would reduce.
- The most mentioned services was policing/fire services (26%) followed by non-car transportation and services (14%).

Tax Revenue vs User Fees

Most residents (62%) believe that services and program should be paid through property tax revenue instead of user fees



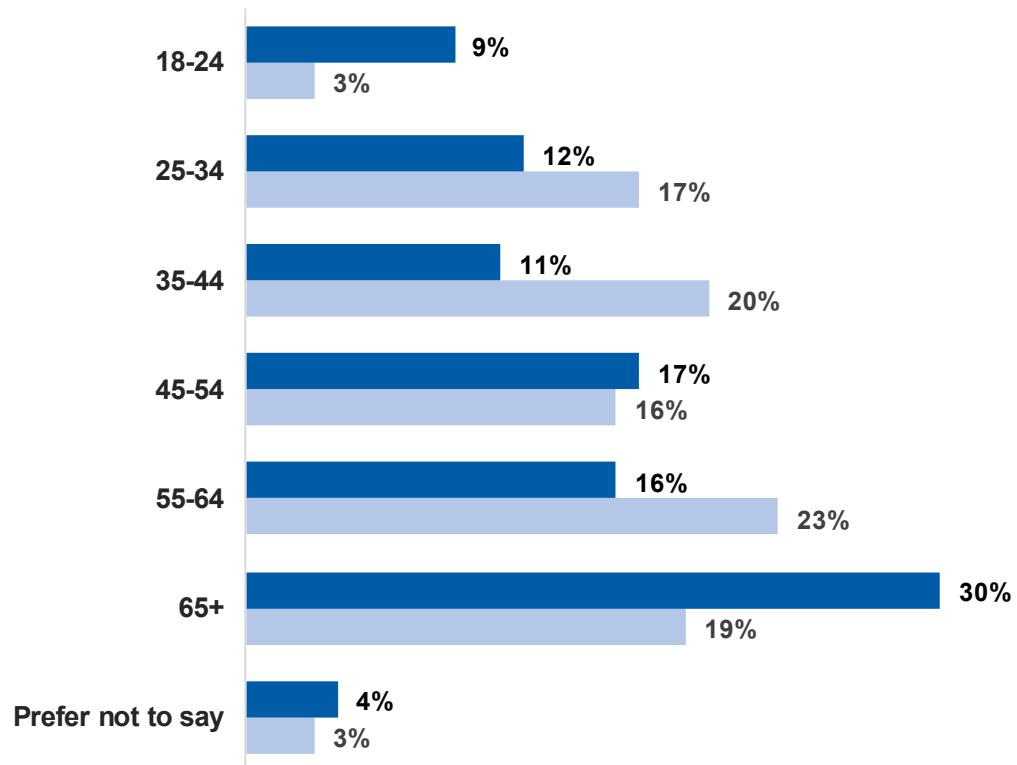
- Municipal services and programs should be available for everyone through property tax revenues
- Those who use municipal programs and services should pay for them through user fees

- Residents who believe services and programs should be paid through taxes are more likely to:
 - Be aged 25-54 (25-34, 73%; 35-44, 71%; 45-54, 71%) than 65+ (54%)
 - Have an income of \$20K to \$40K (80%) than have an income of \$40K to \$80K (\$40K-\$60K, 60%; \$60K-\$80K, 55%) or \$100K and more (56%)
- In contrast, those who believe services and programs should be paid through user fees are more likely to:
 - Be aged 55+ (55-64, 45%; 65+, 46%) than 25-34 (27%) or 45-54 (29%)
 - Have an income of \$40K to \$80K (\$40K-\$60K, 40%; \$60K-\$80K, 45%) or \$100K+ (44%) than have an income of \$20K to \$40K (20%)

Demographics

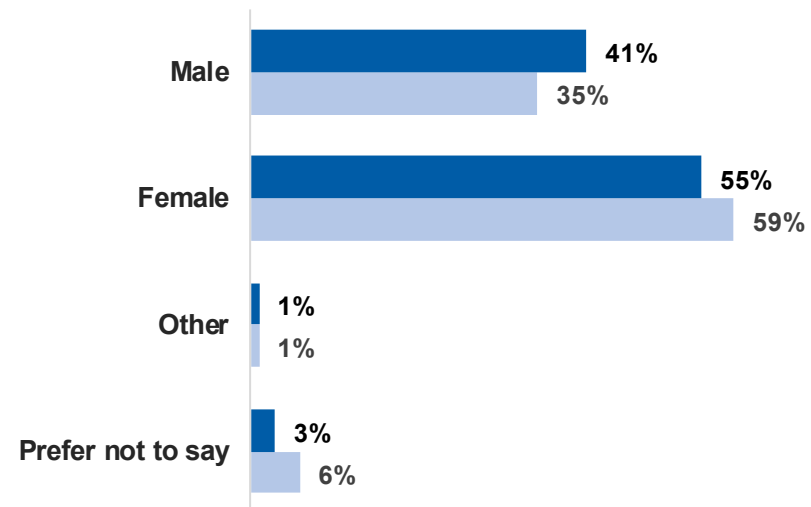
Demographics

Age



D1. How old are you?

Gender



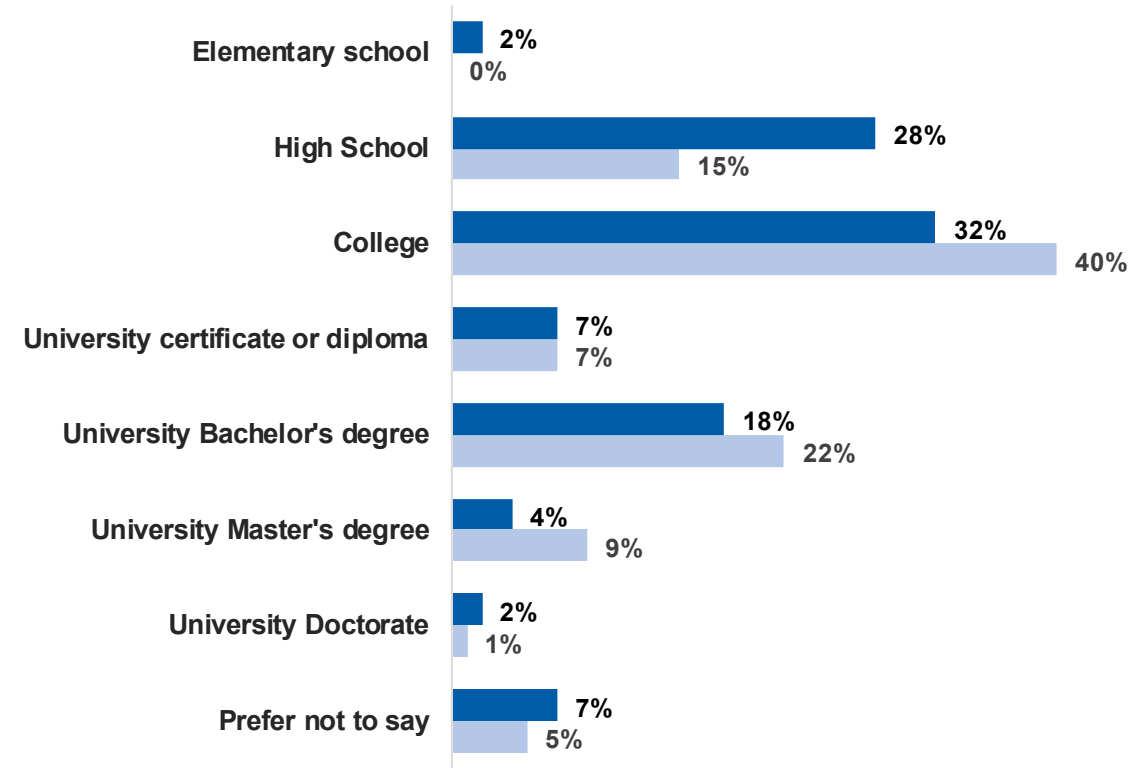
D2. What is your gender identity?

■ Phone

■ Online

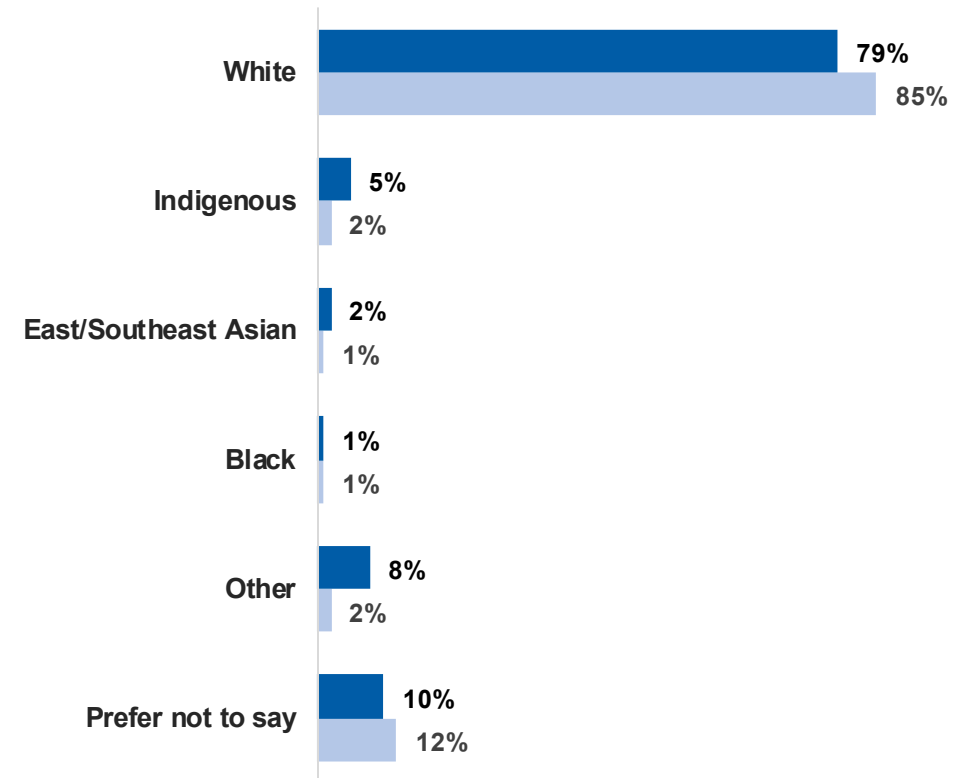
Demographics

Education



D3. Which of the following categories best reflects your last year of formal education?

Racial Background

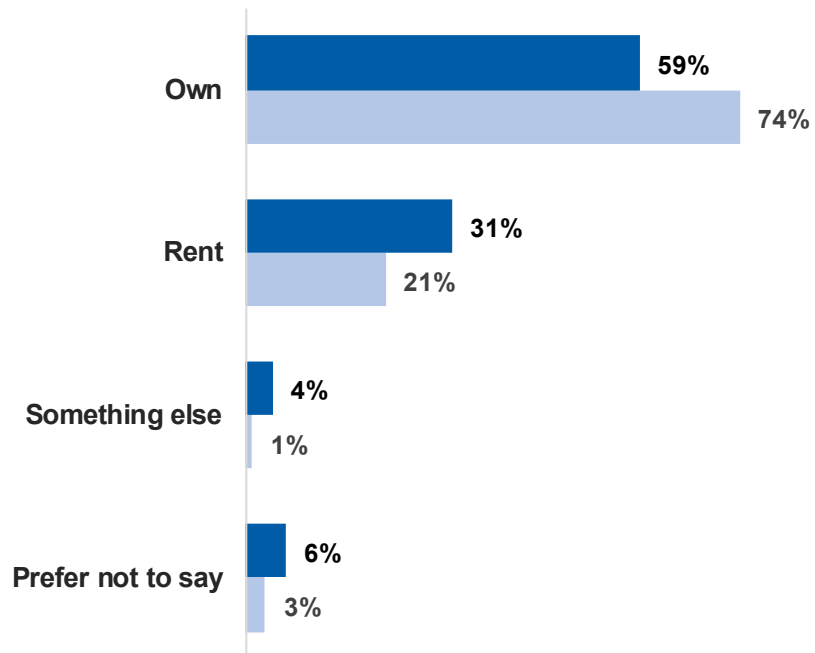


D4. In our society, people are often described by their race or racial background. How would you describe your racial background?

■ Phone
■ Online

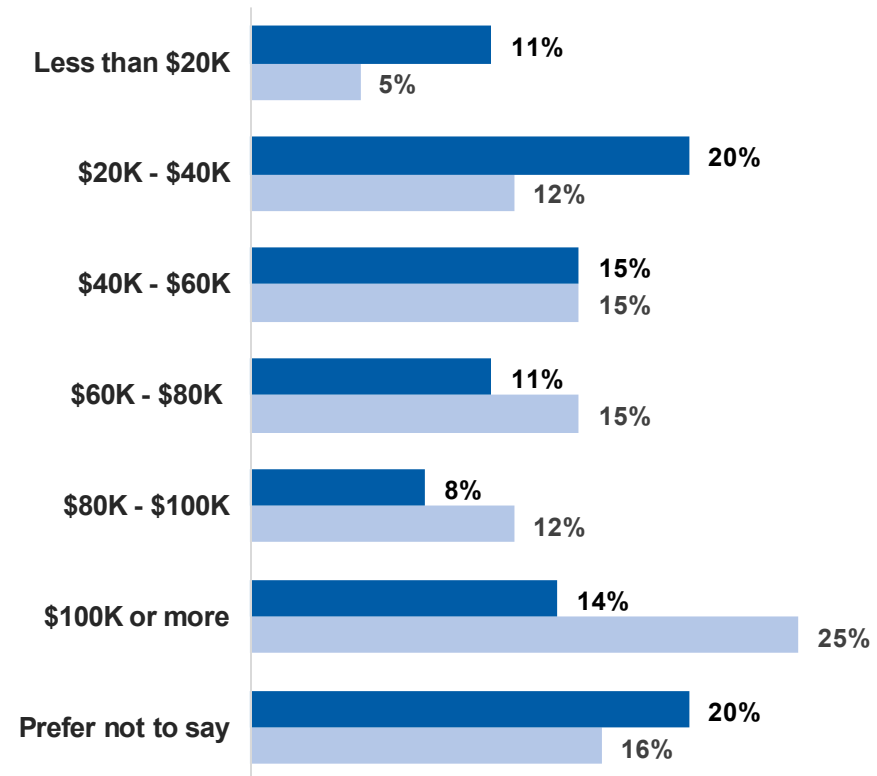
Demographics

Homeowner



D5. Do you own or rent your place of residence?

Household Income



D7. And finally, which of the following categories best describes your household's annual income, before taxes?

■ Phone
■ Online

Appendix

Demographic breakouts

In the following slides, statistically significant results (at the 95% confidence level) are highlighted in red and statistically significant differences between segments are indicated with letters. Each segment is denoted with letters (e.g., J, K, L, etc.). If the letter “J” appears under the response of a certain segment, this indicates that the response of that segment is significantly higher than the response of the segment denoted with the letter “J”.

Frequency of the Usage of Services

Demographic breakouts (1) – TOP2 (Often + Always)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Harrison Park	61%	62%	65%	59%	60%	48%	65%	55%	66%	33%	66%	52%	55%
							N		P		AA		
Harbour and waterfront areas	44%	43%	49%	35%	53%	47%	42%	47%	43%	0%	48%	43%	19%
Other parks and green spaces	41%	46%	48%	48%	42%	43%	33%	39%	43%	33%	48%	28%	32%
											AA		
Julie McArthur Regional Recreation	27%	28%	28%	32%	34%	23%	24%	32%	24%	0%	32%	16%	43%
											AA		
Owen Sound & North Grey Union	24%	16%	16%	23%	29%	31%	24%	19%	28%	0%	27%	21%	10%
Harry Lumley Bayshore Community	23%	25%	20%	19%	33%	23%	19%	25%	22%	0%	30%	11%	23%
					O						AA		
Tom Thomson Gallery	8%	3%	6%	8%	3%	9%	11%	6%	9%	33%	10%	5%	6%
							M						
Public transportation	8%	11%	14%	5%	7%	9%	5%	7%	9%	0%	3%	18%	11%
												Z	
Owen Sound Billy Bishop Airport	3%	5%	5%	0%	2%	5%	2%	4%	3%	33%	3%	4%	6%

Frequency of the Usage of Services

Demographic breakouts (2) – TOP2 (Often + Always)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Harrison Park	61%	38%	60%	56%	47%	72%	68%	69%	43%	47%	76%	64%	77%	55%
						U					ACADAH	AC	ACADAH	
Harbour and waterfront areas	44%	18%	35%	49%	39%	50%	62%	69%	45%	49%	51%	48%	58%	33%
				T							AH		AH	
Other parks and green spaces	41%	0%	34%	38%	31%	62%	56%	48%	20%	32%	56%	43%	59%	39%
						TU					ACADAH	AC	ACAD	AC
Julie McArthur Regional	27%	16%	19%	28%	17%	40%	48%	22%	6%	27%	29%	38%	35%	32%
						T				AC	AC	AC	AC	AC
Owen Sound & North Grey	24%	0%	15%	21%	5%	42%	42%	89%	8%	20%	28%	34%	31%	21%
						TU					AC	AC	AC	
Harry Lumley Bayshore	23%	0%	21%	20%	10%	36%	25%	37%	8%	18%	27%	21%	34%	32%
						TU					AC		AC	AC
Tom Thomson Gallery	8%	0%	3%	8%	0%	13%	18%	45%	3%	6%	4%	10%	10%	13%
						T								AC
Public transportation	8%	0%	14%	8%	3%	5%	0%	0%	25%	10%	10%	3%	3%	0%
						W			AFAGAH	AH	AH			
Owen Sound Billy Bishop	3%	0%	3%	3%	3%	1%	0%	25%	0%	2%	4%	2%	6%	4%

Satisfaction with Services

Safe City - Demographic breakouts (1) – TOP4 Satisfied (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Fire Services	83%	75%	77%	88%	92%	75%	86%	79%	88%	100%	84%	84%	88%
					KN				P				
Police Services	69%	48%	66%	66%	74%	69%	78%	62%	77%	33%	73%	64%	75%
									P				
Winter Maintenance - Roads	58%	54%	47%	44%	56%	60%	70%	58%	58%	67%	60%	56%	53%
							KL						
By-law	49%	65%	44%	48%	56%	47%	47%	44%	55%	67%	51%	47%	61%
Winter Maintenance - Sidewalks	45%	23%	36%	26%	40%	52%	61%	41%	48%	0%	51%	32%	45%
						L	KLM				AA		

Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

Safe City - Demographic breakouts (2) – TOP4 Satisfied (7-10)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Fire Services	83%	92%	83%	86%	83%	83%	70%	77%	73%	93%	81%	89%	77%	78%
										ACAH				
Police Services	69%	59%	70%	73%	75%	72%	71%	65%	58%	77%	63%	60%	66%	73%
Winter Maintenance - Roads	58%	100%	49%	56%	76%	63%	70%	54%	54%	55%	55%	66%	56%	59%
By-law	49%	68%	43%	55%	60%	47%	58%	41%	58%	50%	39%	43%	52%	53%
Winter Maintenance - Sidewalks	45%	62%	43%	40%	64%	48%	41%	37%	44%	36%	38%	43%	39%	50%

Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

City that Moves - Demographic breakouts (1) – TOP4 Satisfied (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Parking	64%	57%	65%	60%	65%	60%	72%	60%	68%	50%	68%	60%	59%
					KN				P				
Transit Services	51%	32%	49%	57%	59%	42%	52%	43%	58%	33%	44%	57%	45%
									P				
Roads and Sidewalks	46%	46%	42%	34%	55%	47%	50%	47%	46%	67%	50%	38%	62%
					L						AA		

Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

City that Moves - Demographic breakouts (2) – TOP4 Satisfied (7-10)



	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Parking	64%	52%	56%	71%	62%	71%	67%	56%	61%	65%	62%	70%	74%	63%
				T										
Transit Services	51%	51%	59%	44%	57%	44%	30%	34%	48%	57%	47%	49%	43%	43%
Roads and Sidewalks	46%	83%	41%	46%	52%	48%	57%	54%	42%	35%	42%	58%	41%	58%
												AD		AD



Q9. Now we'd like to ask you about your satisfaction with some of these services. When answering, please use a number from 1 to 10, where 1 means not satisfied at all and 10 means extremely satisfied. You may also say you don't know. Thinking about all the services related to the City of Owen Sound, how satisfied are you with the following?

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

Green City - Demographic breakouts (1) – TOP4 Satisfied (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Parks and Trails	87%	89%	91%	78%	93%	89%	87%	89%	87%	67%	90%	86%	95%
					L								
Drinking water	79%	88%	75%	67%	76%	82%	82%	76%	82%	67%	84%	67%	83%
											AA		
Garbage and recycling collection	68%	62%	71%	56%	71%	72%	72%	69%	70%	67%	67%	72%	67%

Satisfaction with Services

Green City - Demographic breakouts (2) – TOP4 Satisfied (7-10)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,00 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Parks and Trails	87%	54%	85%	93%	82%	91%	89%	84%	83%	93%	90%	89%	79%	85%
Drinking water	79%	79%	71%	83%	81%	86%	74%	63%	80%	73%	69%	86%	93%	81%
						T						AE		
Garbage and recycling collection	68%	100%	80%	70%	66%	51%	61%	50%	76%	70%	73%	64%	54%	58%
			W	W										

Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

City Building - Demographic breakouts (1) – TOP4 Satisfied (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Library services	84%	69%	86%	74%	86%	81%	91%	80%	87%	33%	87%	80%	68%
							L						
Recreation Facilities	79%	62%	73%	79%	88%	79%	85%	74%	84%	67%	83%	75%	61%
									P				
Tom Thomson Art Gallery	70%	56%	65%	75%	71%	65%	73%	63%	74%	67%	74%	60%	70%
Recreation Programs	67%	45%	58%	64%	74%	70%	77%	68%	70%	0%	73%	61%	68%

Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Satisfaction with Services

City Building - Demographic breakouts (2) – TOP4 Satisfied (7-10)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Library services	84%	83%	79%	81%	87%	93%	89%	100%	68%	85%	89%	79%	89%	80%
						TU								
Recreation Facilities	79%	64%	72%	83%	92%	78%	88%	86%	58%	85%	77%	85%	88%	78%
Tom Thomson Art Gallery	70%	100%	61%	70%	39%	77%	86%	88%	66%	64%	69%	74%	74%	66%
Recreation Programs	67%	35%	64%	65%	77%	76%	75%	100%	47%	70%	69%	62%	83%	71%

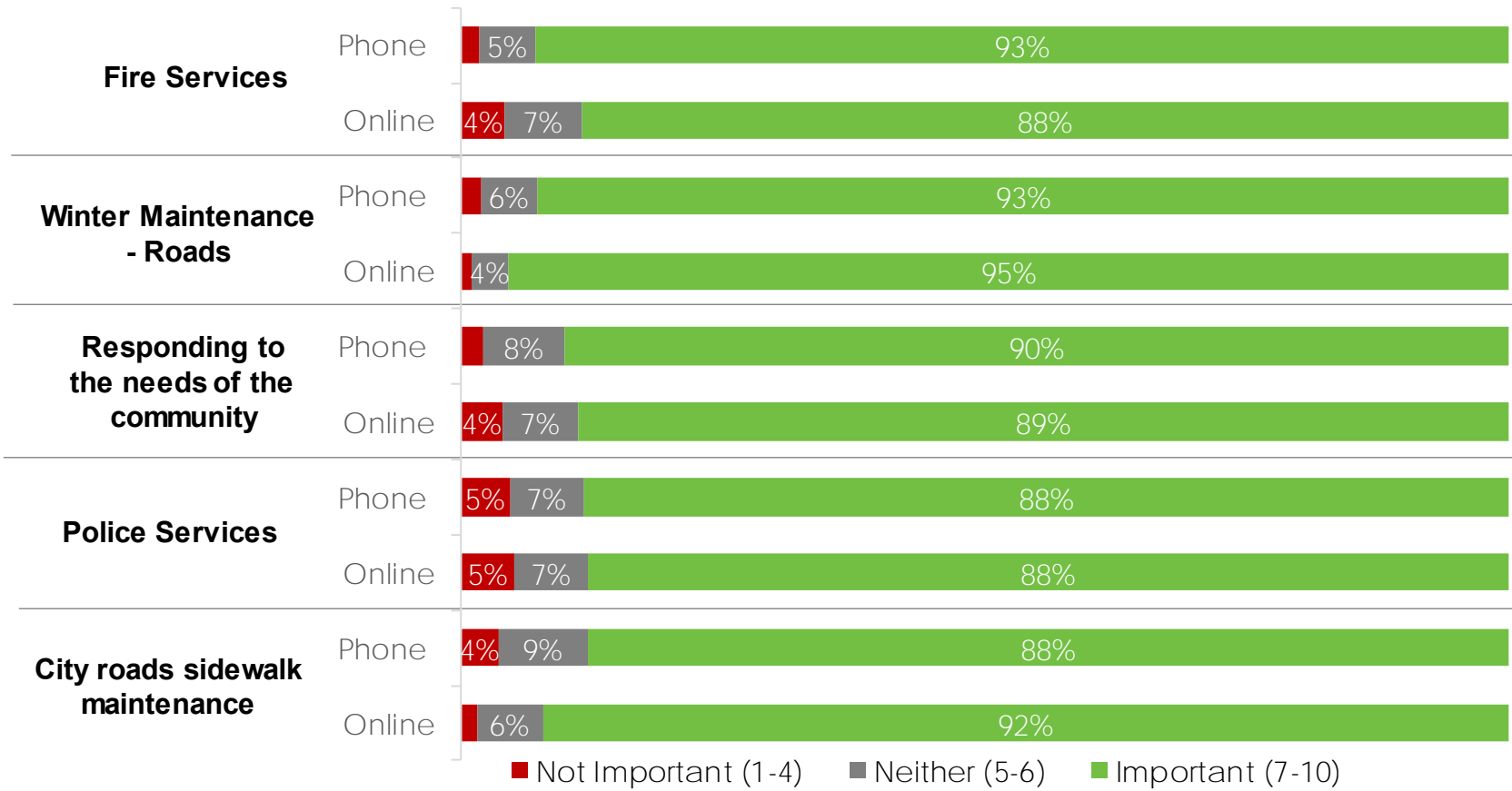
Q10. Now we'd like to ask about your satisfaction with some other services in Owen Sound. How satisfied are you with...

Framework: All Respondents, excluding "not applicable" and "don't know"

Sample size: Phone n = 401 (varies per category)

Perceived Importance of Services

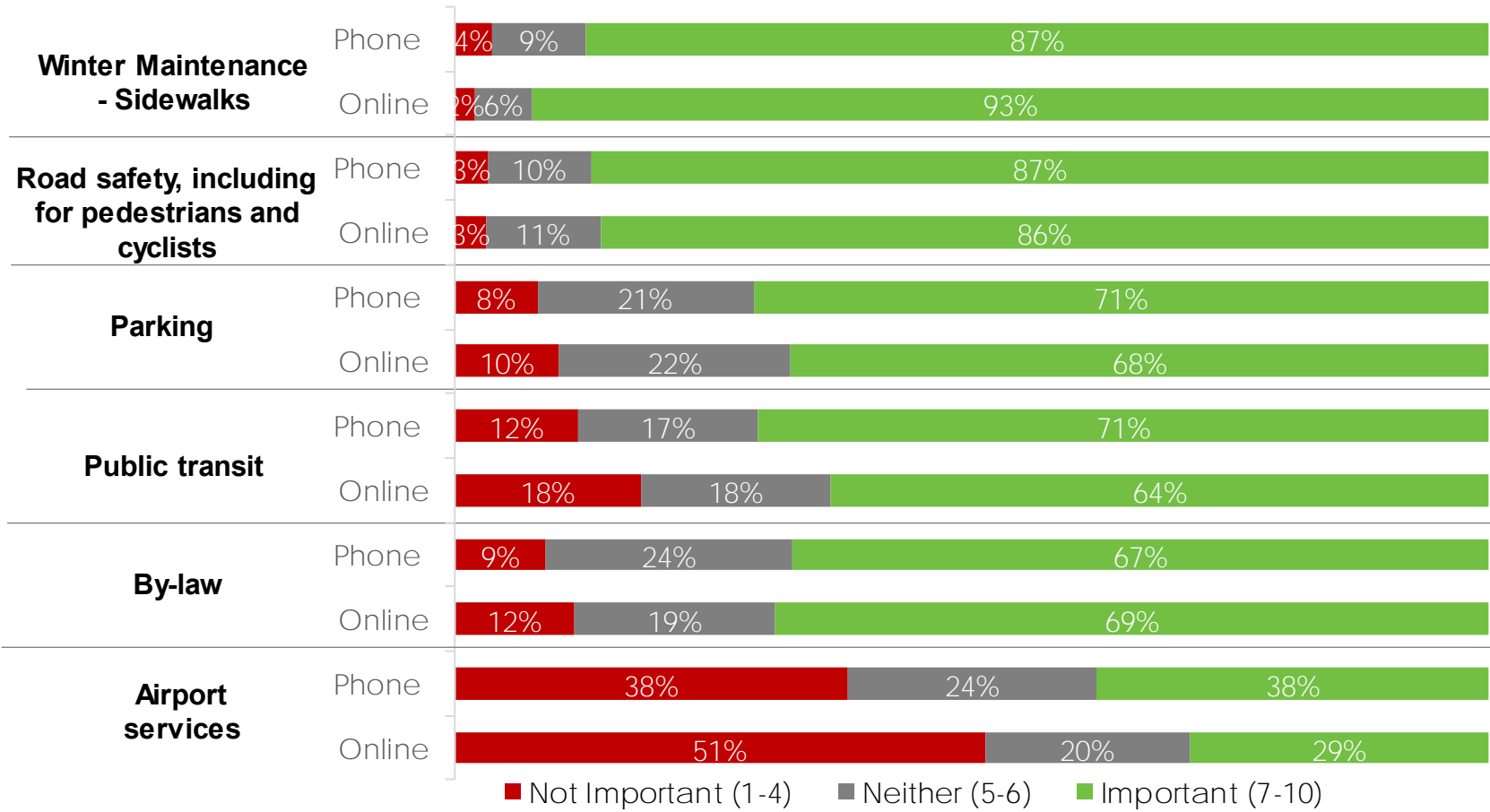
Fire Services and Winter Road Maintenance were services that most residents think are important (TOP4: 93%)



- Safety related services such as **fire services, winter maintenance – roads, and police services** ranked highest in terms of their importance for residents.

Perceived Importance of Services

Airport services was found the least important (TOP4: 38%)



- **Airport services** being the least important to residents is consistent with the low frequency of usage of Owen Sound Billy Bishop Airport.

Perceived Importance of Services

Demographic breakouts (1) – TOP4 Important (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Fire Services	93%	80%	91%	96%	98%	95%	95%	90%	97%	67%	94%	94%	89%
									P				
Winter Maintenance- Roads	93%	93%	93%	87%	95%	93%	93%	92%	93%	100%	94%	91%	94%
Responding to the needs of the community	90%	91%	96%	86%	89%	91%	89%	88%	92%	67%	90%	89%	90%
Police Services	88%	70%	82%	92%	92%	92%	92%	83%	92%	100%	89%	87%	88%
									P				
City roads sidewalk maintenance	88%	71%	86%	79%	92%	94%	91%	85%	91%	100%	92%	86%	67%
						L							

Perceived Importance of Services

Demographic breakouts (2) – TOP4 Important (7-10)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Fire Services	93%	100%	98%	93%	85%	92%	86%	100%	95%	97%	92%	88%	100%	88%
										AH			AEFAH	
Winter Maintenance- Roads	93%	100%	88%	93%	85%	99%	95%	100%	85%	94%	90%	95%	97%	95%
						TU								
Responding to the needs of the community	90%	91%	89%	90%	74%	93%	100%	100%	89%	92%	87%	87%	100%	87%
													ACADAEFAH	
Police Services	88%	81%	91%	90%	83%	84%	90%	76%	92%	90%	81%	81%	88%	93%
														AEAF
City roads sidewalk maintenance	88%	100%	85%	87%	79%	94%	95%	89%	82%	90%	87%	89%	94%	87%

Perceived Importance of Services

Demographic breakouts (3) – TOP4 Important (7-10)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Winter maintenance -Sidewalks	87%	86%	91%	82%	88%	85%	89%	89%	86%	67%	90%	83%	83%
Road safety	87%	84%	86%	81%	86%	87%	90%	83%	91%	67%	89%	83%	77%
Parking	71%	57%	68%	68%	68%	72%	78%	64%	76%	67%	72%	72%	59%
Public Transit	71%	70%	73%	65%	63%	71%	78%	62%	77%	67%	67%	81%	63%
By-law	67%	44%	59%	60%	72%	70%	79%	61%	73%	67%	67%	68%	73%
Airport services	38%	38%	44%	31%	39%	41%	37%	34%	41%	67%	36%	44%	38%

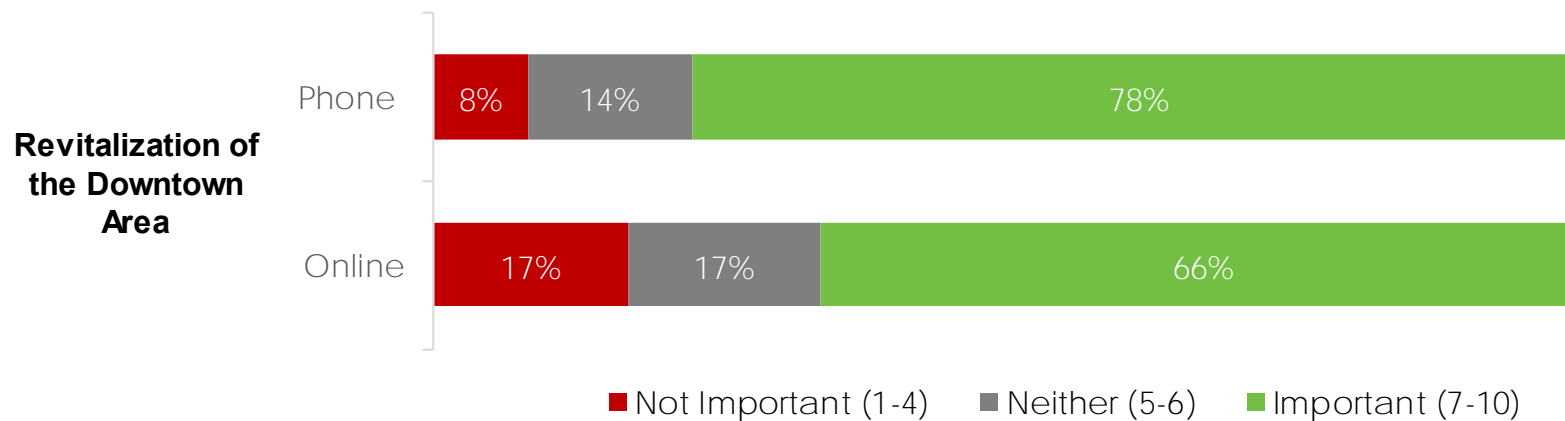
Perceived Importance of Services

Demographic breakouts (4) – TOP4 Important (7-10)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Winter maintenance -Sidewalks	87%	74%	84%	87%	73%	94%	95%	86%	82%	84%	86%	87%	88%	96%
						T								AD
Road safety	87%	90%	85%	85%	78%	93%	90%	80%	86%	89%	85%	91%	97%	84%
													AEAH	
Parking	71%	79%	66%	74%	73%	64%	79%	67%	62%	77%	72%	76%	56%	69%
Public Transit	71%	78%	77%	65%	66%	72%	66%	84%	73%	86%	74%	69%	63%	50%
									AH	AFAH	AH	AH		
By-law	67%	91%	74%	68%	60%	63%	59%	36%	75%	79%	55%	62%	67%	53%
										AEAFAH				
Airport services	38%	50%	37%	44%	32%	30%	31%	57%	51%	46%	28%	28%	36%	43%

Perceived Importance of the Revitalization of the Downtown Area

Almost 8 in 10 (TOP4: 78%) consider the revitalization of the downtown area important



- Residents who think the revitalization of the downtown area is important were more likely to be:
 - Aged 65+ (TOP4: 86%) than aged 35-44 (TOP4: 63%)

Q14. And lastly, how important is the revitalization of the downtown area in Owen Sound to you?
Framework: All Respondents, excluding "not applicable" and "don't know"
Sample size: Phone n = 392 / Online n = 895

Live Council Meetings

Demographic breakouts (1)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Always	2%	0%	0%	0%	2%	2%	3%	3%	2%	0%	2%	1%	0%
Often	4%	0%	5%	6%	3%	1%	6%	4%	4%	0%	4%	2%	0%
Sometimes	27%	15%	32%	31%	19%	18%	34%	26%	28%	67%	24%	41%	7%
Rarely	33%	29%	33%	37%	37%	45%	26%	33%	33%	0%	33%	30%	62%
Never	35%	56%	30%	26%	39%	33%	31%	35%	34%	33%	37%	25%	31%

Live Council Meetings

Demographic breakouts (2)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,00 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Always	2%	32%	0%	0%	0%	5%	0%	14%	0%	0%	0%	2%	3%	0%
Often	4%	0%	6%	4%	0%	2%	0%	28%	0%	0%	4%	9%	7%	4%
Sometimes	27%	21%	26%	35%	19%	18%	32%	26%	38%	34%	33%	25%	12%	26%
Rarely	33%	0%	37%	30%	35%	43%	20%	20%	22%	37%	32%	40%	40%	27%
Never	35%	47%	31%	30%	46%	33%	48%	12%	40%	29%	31%	24%	37%	42%

Tax Revenue vs User Fees

Demographic breakouts (1)

	Total	AGE						GENDER			HOME OWNERSHIP		
		18-24 (J)	25-34 (K)	35-44 (L)	45-54 (M)	55-64 (N)	65+ (O)	Male (P)	Female (Q)	Other (R)	Own (Z)	Rent (AA)	Something else (AB)
Municipal services and programs should be available for everyone through property tax revenues	62%	64%	73%	71%	71%	55%	54%	61%	64%	67%	60%	70%	70%
			NO	O	NO								
Those who use municipal programs and services should pay for them through user fees	38%	36%	27%	29%	29%	45%	46%	39%	36%	33%	40%	30%	30%
						KM	KLM						

Tax Revenue vs User Fees

Demographic breakouts (2)

	Total	EDUCATION							INCOME					
		Elementary school (S)	High School (T)	College (U)	University certificate or diploma (V)	University Bachelor's degree (W)	University Master's degree (X)	University Doctorate (Y)	Less than \$20,000 (AC)	\$20,000 to just under \$40,000 (AD)	\$40,000 to just under \$60,000 (AE)	\$60,000 to just under \$80,000 (AF)	\$80,000 to just under \$100,000 (AG)	\$100,000 or more (AH)
Municipal services and programs should be available for everyone through property tax revenues	62%	59%	64%	63%	45%	71%	73%	30%	64%	80%	60%	55%	63%	56%
										AEFAH				
Those who use municipal programs and services should pay for them through user fees	38%	41%	36%	37%	55%	29%	27%	70%	36%	20%	40%	45%	37%	44%
											AD	AD		AD