



MEMBER GALLUP
INTERNATIONAL ASSOCIATION

June-July
2005



City of Niagara Falls

Service Satisfaction & Priority-Setting Study

Presented on October 17, 2005 by:

Craig Worden
Associate Vice President, Public Affairs
cworden@legermarketing.com

Toronto

Montreal

Edmonton

New York

Objectives

▶ Consult adult residents of Niagara Falls to determine and measure:

1. SERVICE EVALUATION

- ▶ Level of importance placed on each of the City services provided
- ▶ Frequency of usage of each of the City services
- ▶ Satisfaction with City services overall and each of the City services

2. SERVICE DELIVERY & BUDGETING OPTIONS

- ▶ Public preferences: Level/number of City services (Service Demand)
- ▶ Public preferences: Budgetary principles for providing City services
- ▶ Public support/opposition: Contracting-out delivery of City services

3. PUBLIC PRIORITIES

- ▶ Top-of-mind public issues agenda
- ▶ Overall & Comparative Ranking of the 6 Strategic Priorities for 2004-2006

Methodology

▶ Research Instrument

- ▶ Telephone survey
- ▶ Approx. 18-minute average length

▶ Field Window

- ▶ June 28th – July 11th, 2005

▶ Sample Size/Scope & Statistical Reliability

- ▶ Randomly-selected, representative sample of **500** adult residents of Niagara Falls
- ▶ Margin of Error of **$\pm 4.4\%$** , 19 times out of 20
- ▶ Sub-segments of the overall sample size have a progressively higher margin of error.



MEMBER GALLUP
INTERNATIONAL ASSOCIATION

June-July
2005



Service Evaluation

Gap Analysis of
Importance, Usage,
& Satisfaction

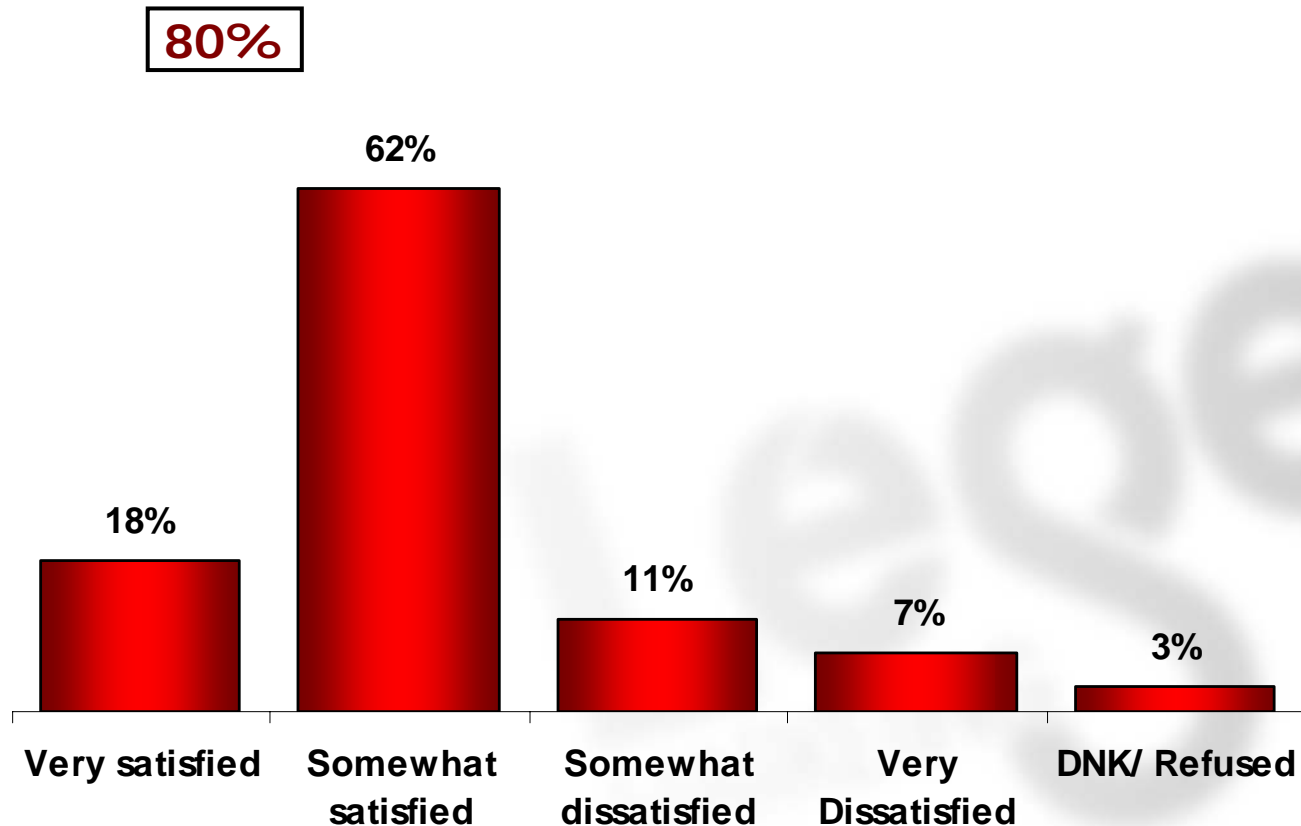
Toronto

Montreal

Edmonton

New York

Overall Service Satisfaction: High, but Moderate. Matches Provincial & Regional Benchmarks.

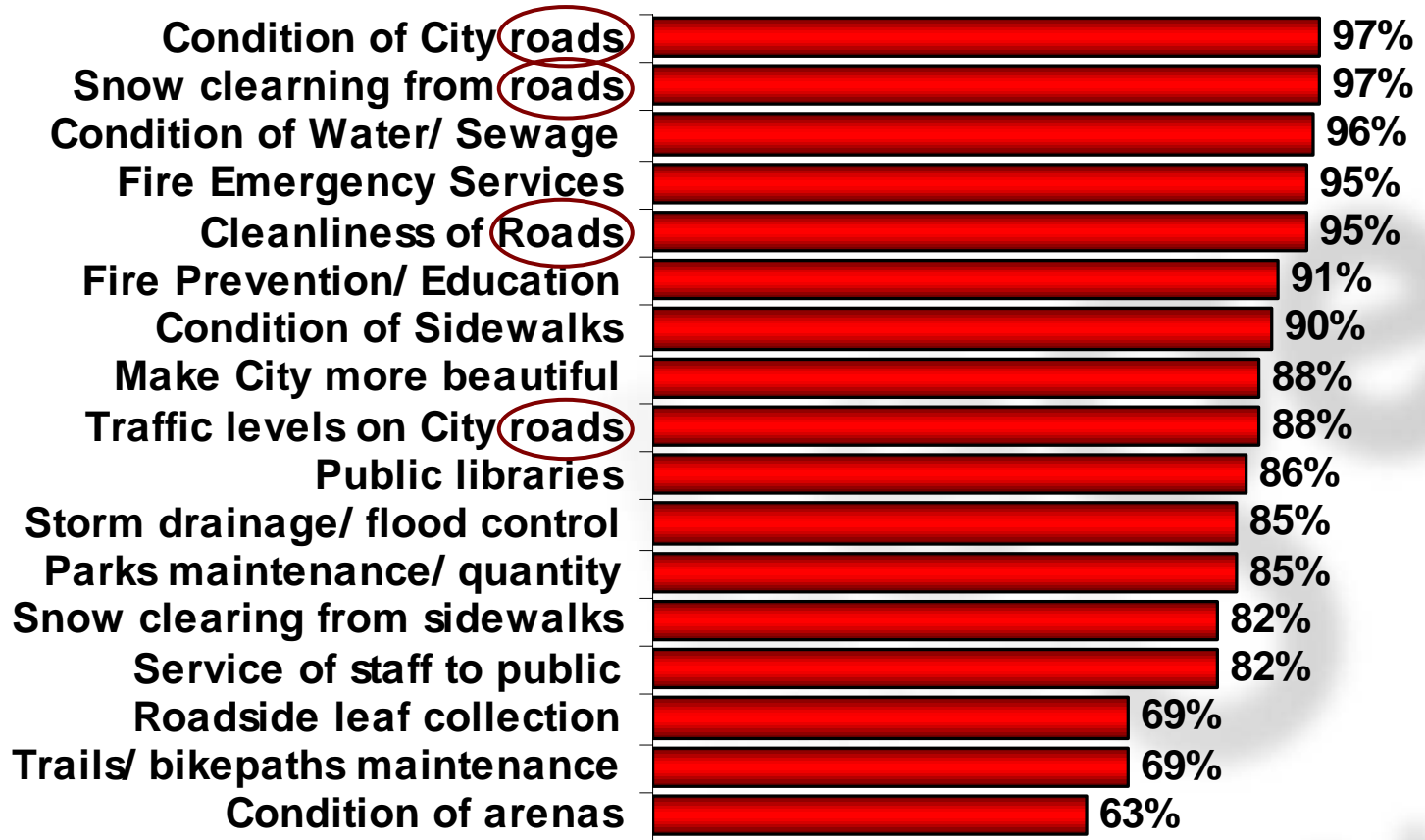


Now, I would like you to think about all of the services that are provided by the City of Niagara Falls... Overall, are you very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the overall quality of services provided by the City of Niagara Falls municipal government?

Rating the Importance of City Services

Most: Roads/Necessities. Least: Recreation/Leaf Pick-Up.

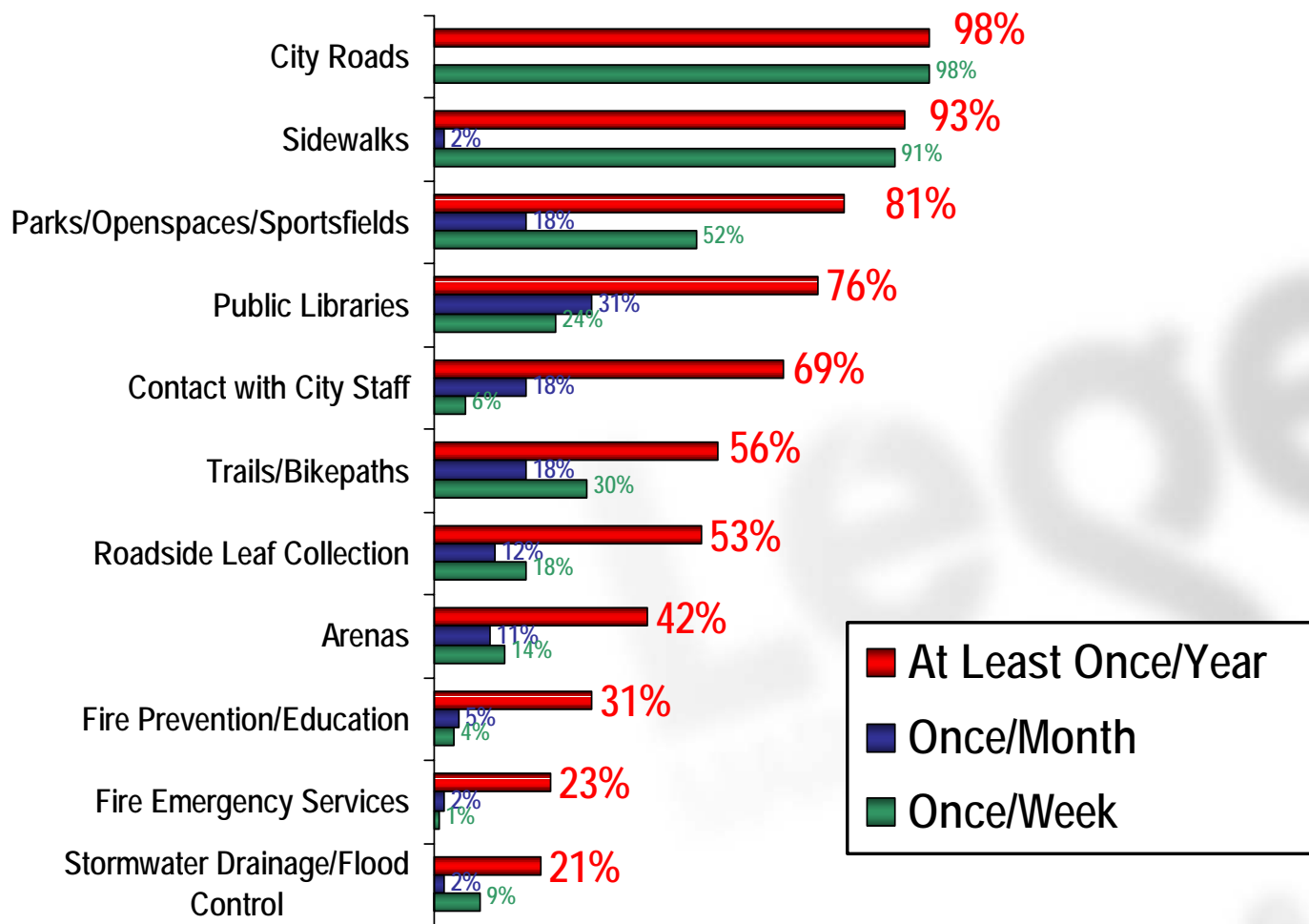
% Very or Somewhat Important



Now, I am going to read a number of different services and programs provided by the City of Niagara Falls. For each, I would like you to tell me how important it is to you and your household.

Usage of City Services

Most: Roads/Sidewalks/Parks. Least: Emergency Services.



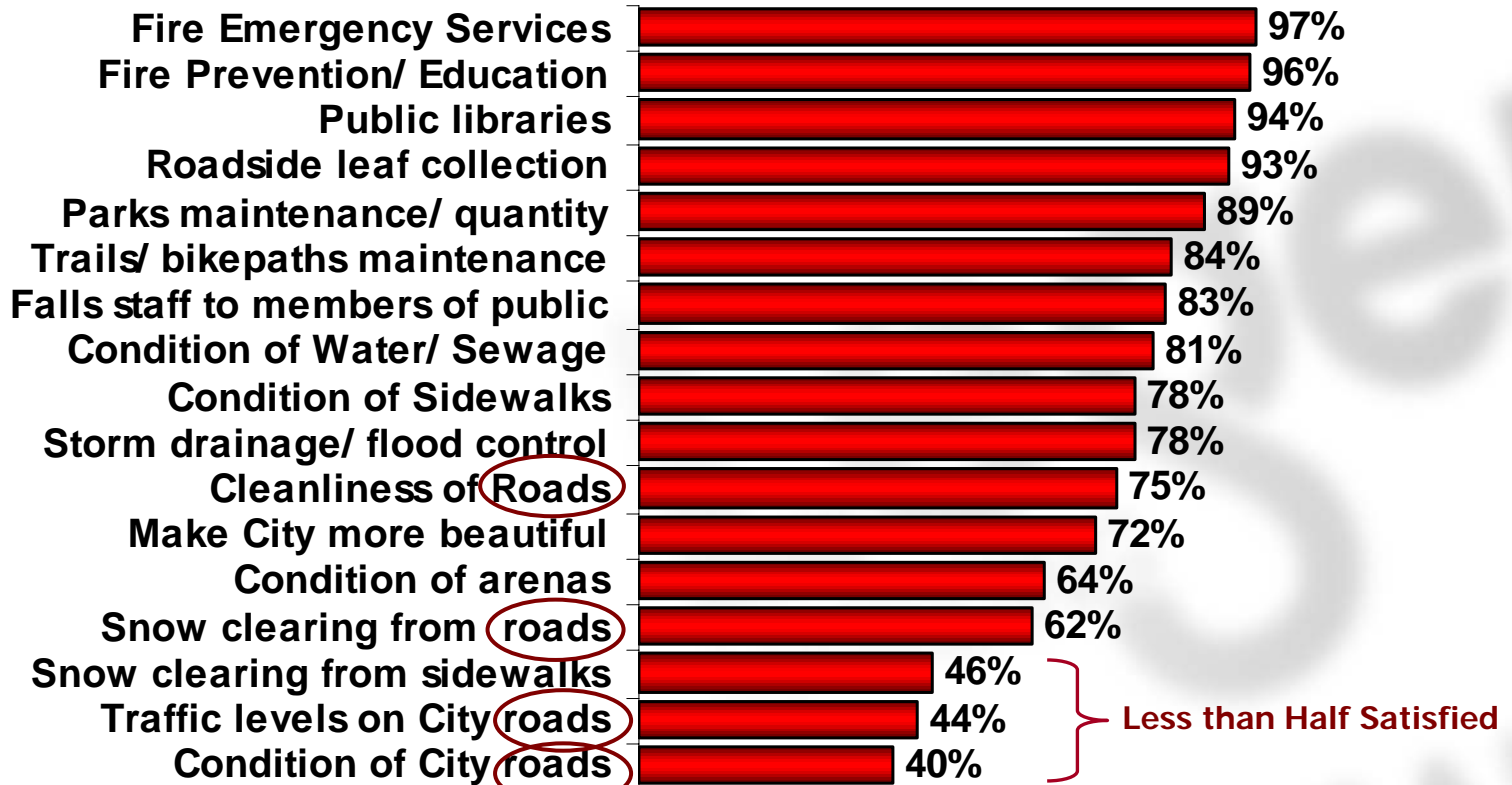
And, please tell me what BEST represents how often you and your household use the service or program within a typical year.

Rating User Satisfaction of City Services

Highest: Emergencies/Libraries/Leaves/Parks.

Lowest: Roads/Snow/Arenas.

% Very or Somewhat Satisfied



Thinking about your level of satisfaction with this service, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied? Base: Those using each service.

Gap Analysis: Importance vs. Satisfaction

	Important Rating	User Satisfaction Rating	Gap Score
Roadside Leaf Collection Program	69%	93%	+24
Number and condition of trails/ bike pathways	69%	84%	+15
Public libraries	86%	94%	+8
Fire prevention and safety education	91%	96%	+5
Number and Maintenance of parks, open spaces, sports fields	85%	89%	+4
Emergency response by Fire Department	95%	97%	+2
Falls staff to the public	82%	83%	+1
Condition/ Maintenance of arenas	63%	64%	+1
Storm water drainage and flood control	85%	78%	-7
Condition/ Maintenance of sidewalks	90%	78%	-12
Condition/ Maintenance of water and sewage systems	96%	81%	-15
Initiatives to make City more beautiful	88%	72%	-16
Cleanliness of <u>roads</u>	95%	75%	-20
Clearing <u>snow</u> from roads	97%	62%	-35
Clearing <u>snow</u> from sidewalks	82%	46%	-36
Level of traffic on <u>roads</u>	88%	44%	-44
Condition/ Maintenance of <u>roads</u>	97%	40%	-57



MEMBER GALLUP
INTERNATIONAL ASSOCIATION



Service Delivery & Budgeting Options

Public Preferences

June-July
2005

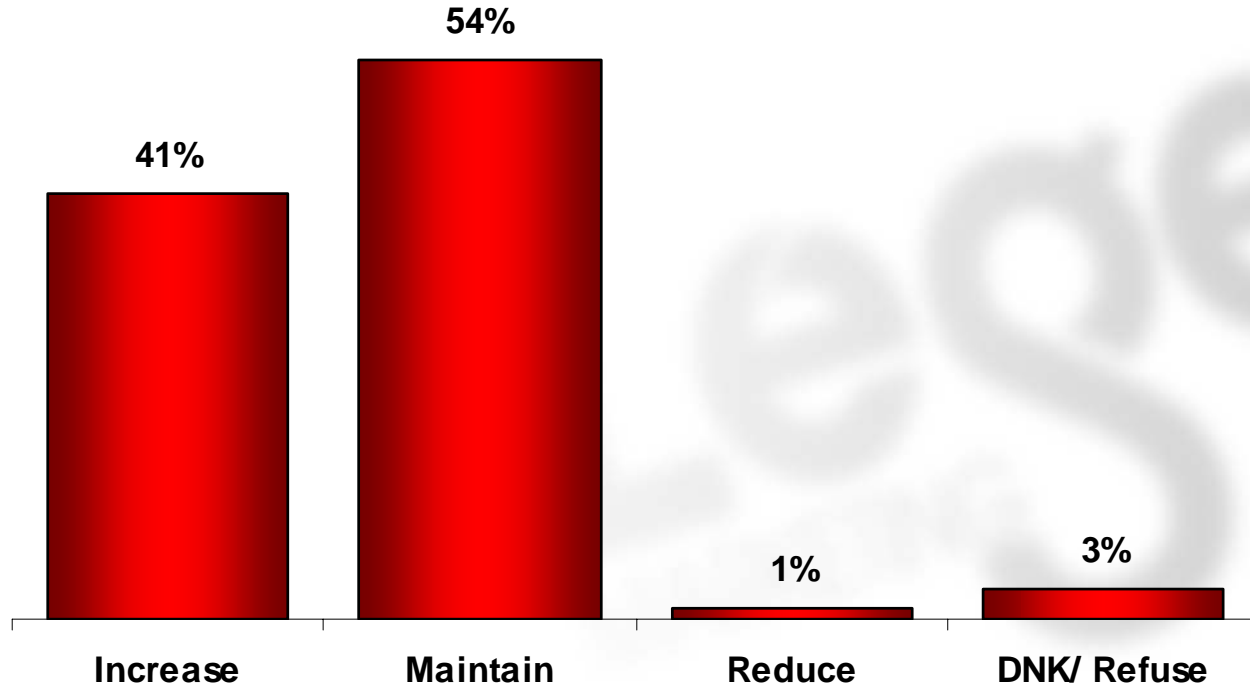
Toronto

Montreal

Edmonton

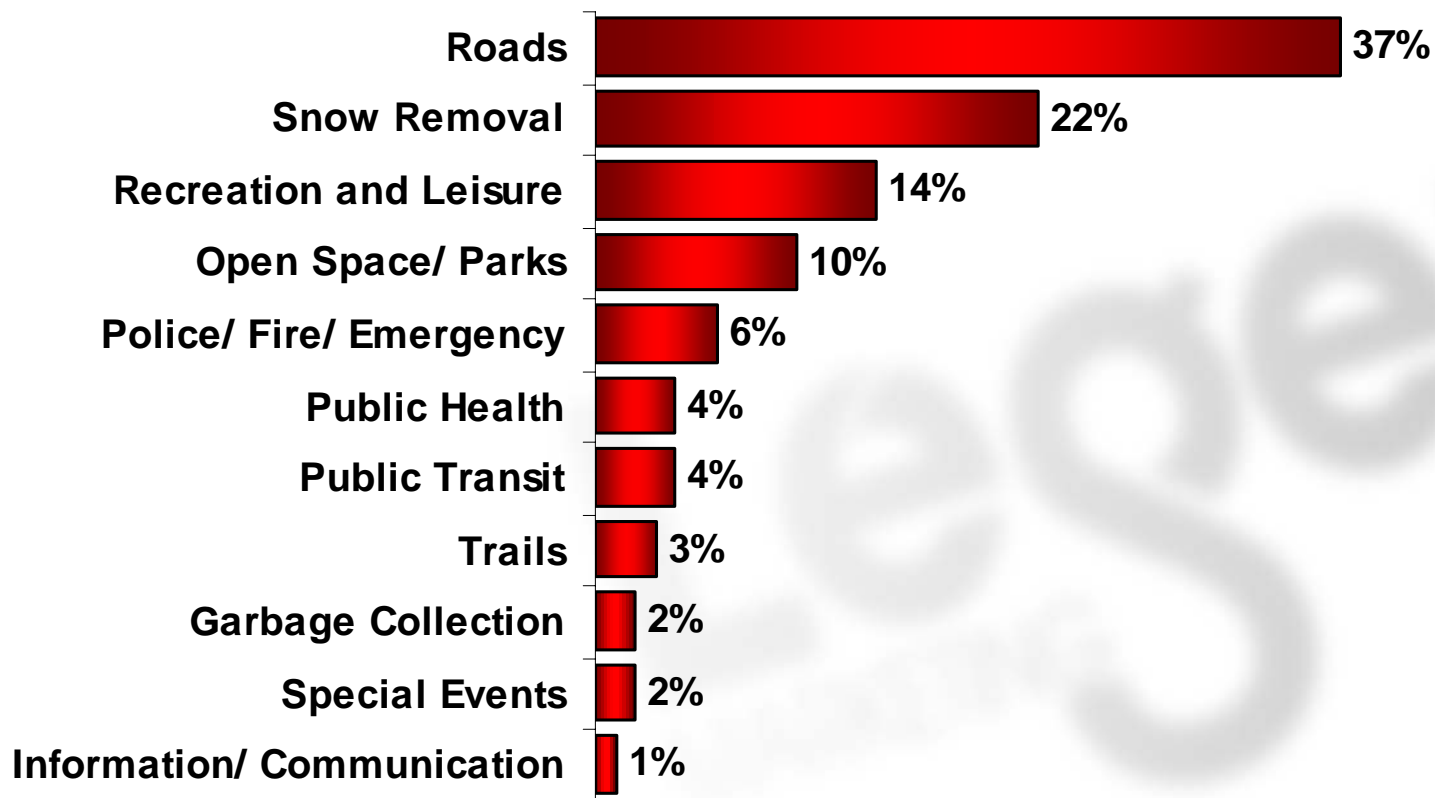
New York

Service Demand: *No Reduction in Services.*
Majority prefer Maintaining Current Number/Level.
Four-in-Ten want an Increase in Number/Level of Services.



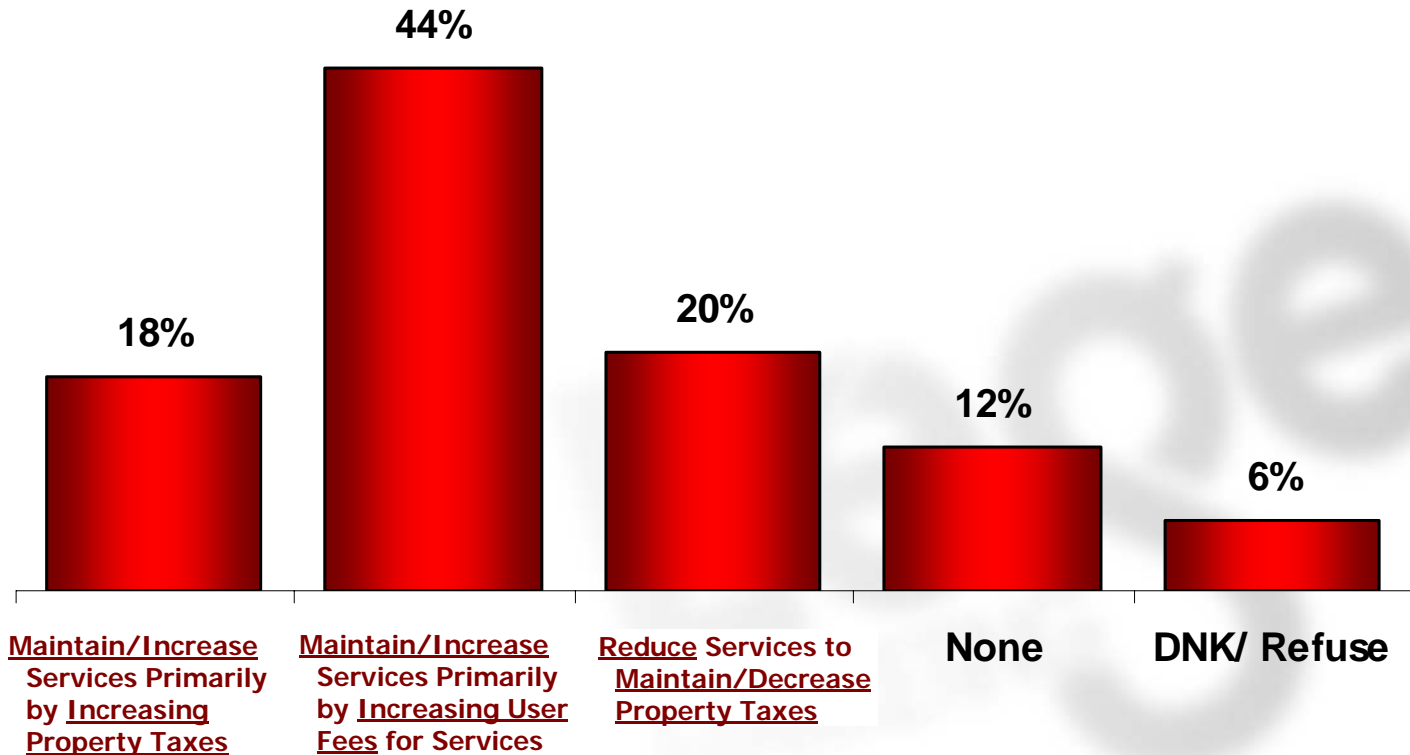
Now, overall, thinking about the current services provided to you by the City of Niagara Falls, do you feel that the City should increase, reduce, or maintain the current number or level of services it provides?

Preferred Service Improvements (by 41% Wanting Service Increase): *Primary: Roads. Secondary: Snow. Tertiary: Rec/Parks.*



Are there any specific services that you would like increased? Base: Those wanting service increase. **Open-End. Total Mentions: Multiple Answers.**

Budgetary Principles: *Within Budgetary Context, 62% want to Maintain/Increase Services – with Plurality (44%) Preferring to do so via User Fees.*



Now, thinking about the City's Budget, which of the following guiding principles would you most prefer, be adopted when designing future budgets?

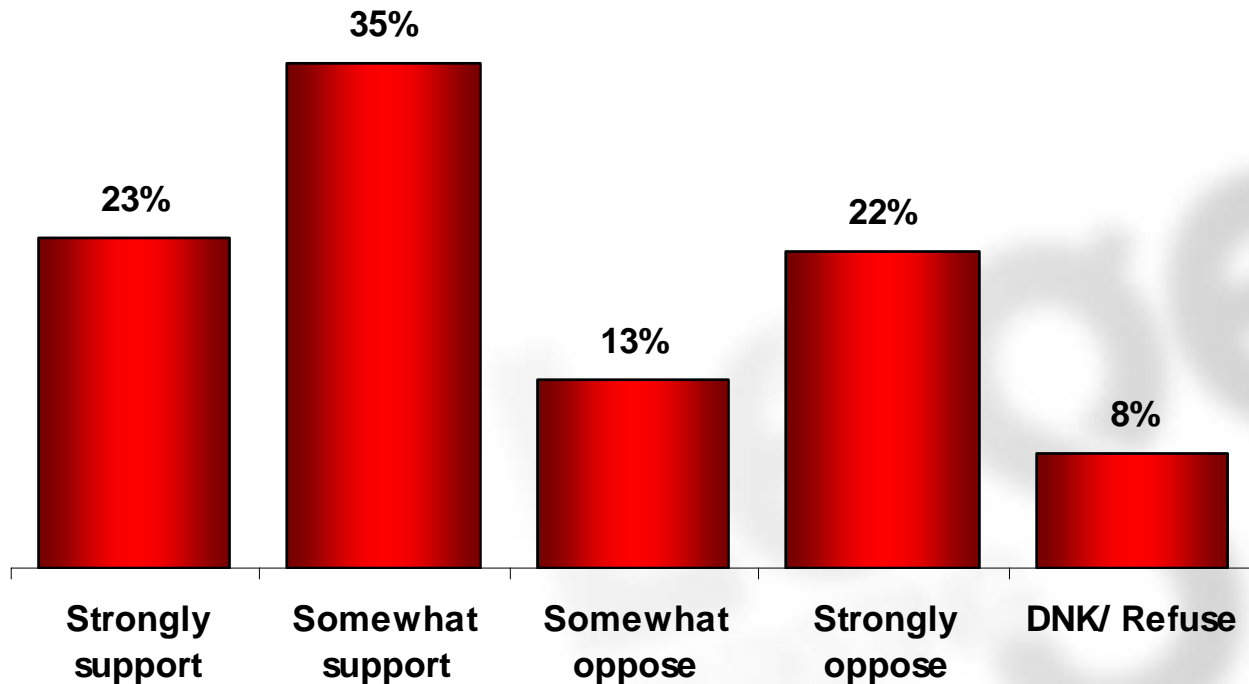
Toronto

Montreal

Edmonton

New York

Contracting-Out Service Delivery: *Almost 6-in-10 (58%) Support as Cost Reduction Method*



Thinking of services that the City of Niagara Falls provides now, and will provide in the future... Do you strongly support, somewhat support, somewhat oppose, or strongly oppose contracting-out the delivery of certain local government services to private companies that specialize in delivering those particular services, such as snow removal, or grass cutting, as a method of reducing what the City has to spend on service delivery?

Leger
MARKETING

MEMBER GALLUP
INTERNATIONAL ASSOCIATION



Public Priorities

Issues Agenda & Planning

June-July
2005

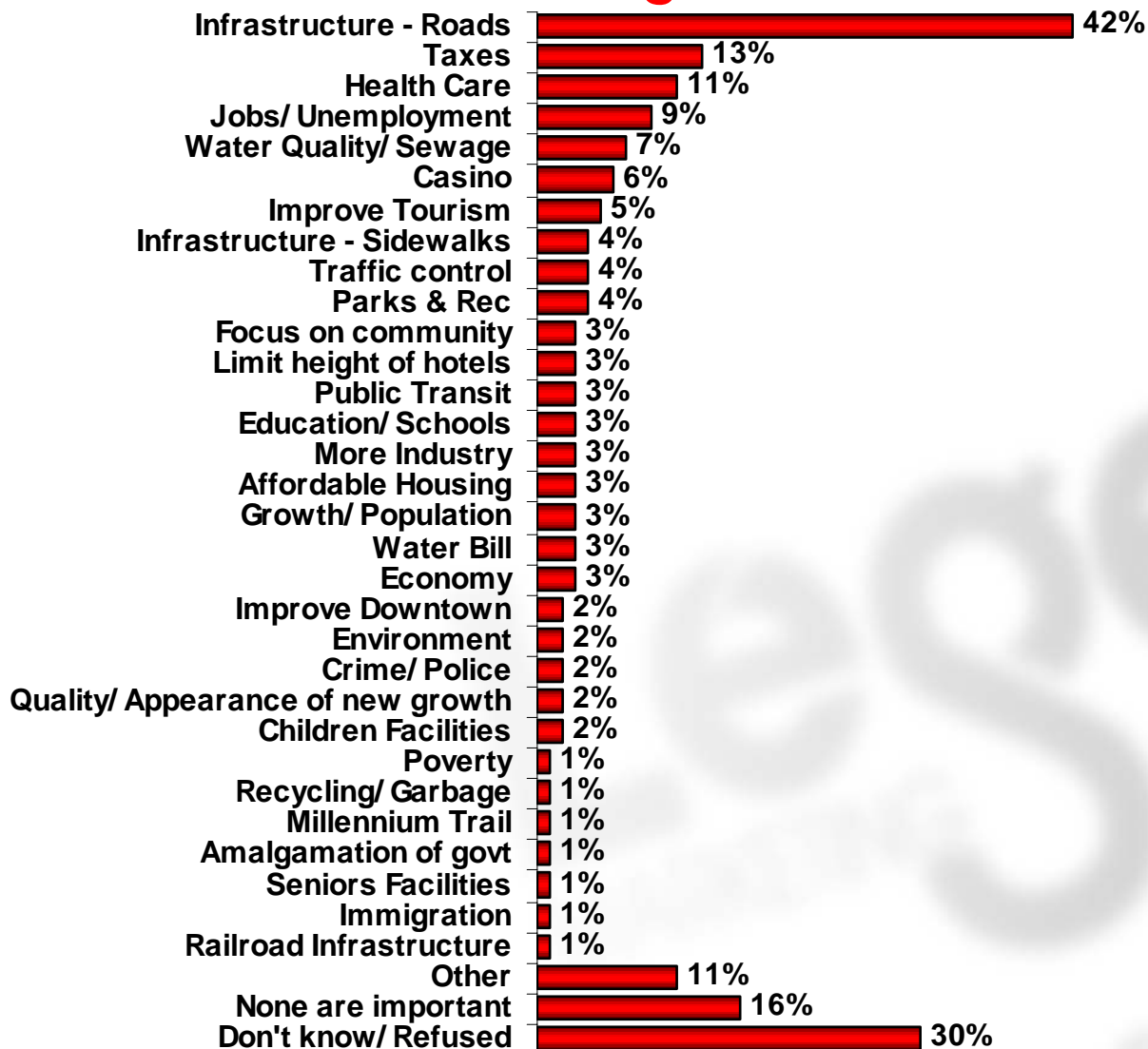
Toronto

Montreal

Edmonton

New York

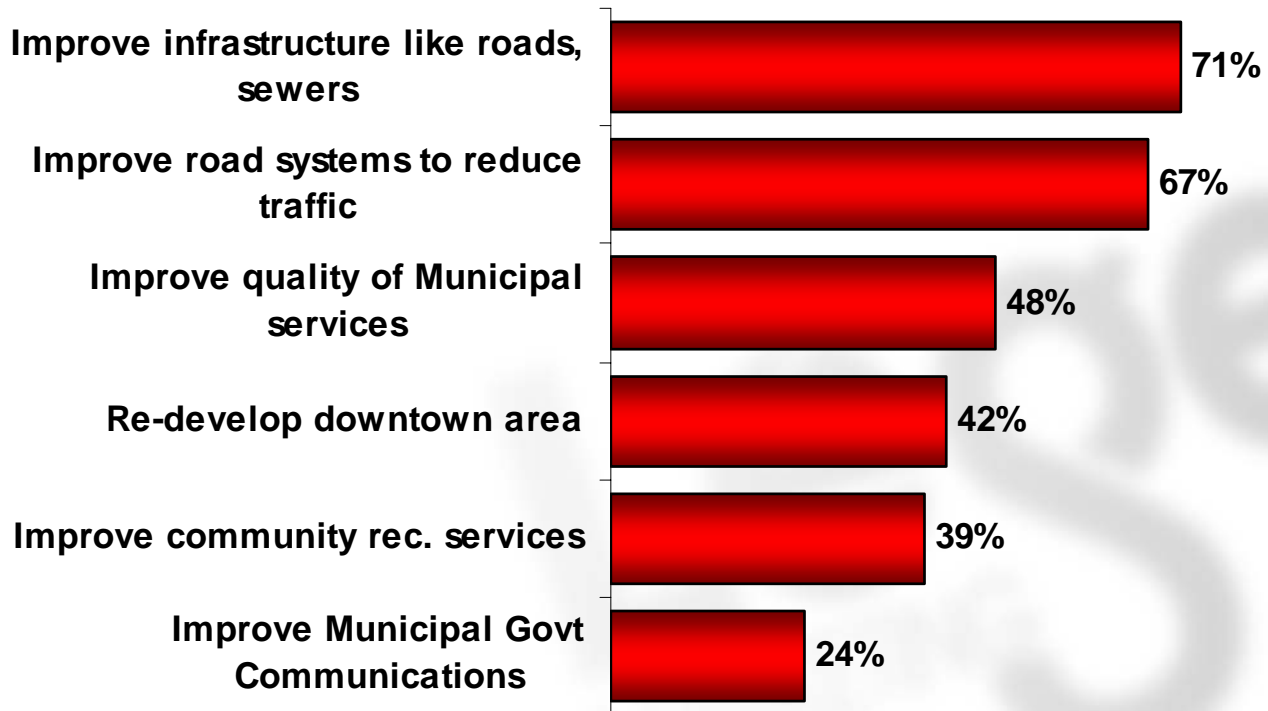
Top-of-Mind Public Issues Agenda



1st Survey Question, Open-End: Thinking of the issues presently confronting the City of Niagara Falls, which ONE do you feel should receive the greatest attention from the city's leaders. That is, the ONE they should give TOP priority to? What other issues...? **Total Mentions: Multiple Answers.**

Overall Ranking of 6 Strategic Priorities, 2004-06

► **Pairwise Testing:** Percentages represent number of times that each item is chosen/prioritized by respondents when presented in a pair.



As you may know, Niagara Falls City Council has developed their strategic priorities for the years 2004, 2005, and 2006. At present, the Council has established 6 key priority areas to focus upon. These priorities will guide the City Council's decisions and budget planning. Now, I am going to read you these 6 key priority areas in a series of PAIRS. For each of the following PAIRS that your Niagara Falls Municipal Government can spend taxpayers' money on, I would like you to tell me which ONE you feel should receive HIGHER priority.

Comparative Ranking of 6 Strategic Priorities, 04-06

▶ **Pairwise Testing:** Percentages represent number of times that each **COLUMN** item is chosen/prioritized by respondents over **ROW** item.

▶ Results may not add up to 100% due to "Don't Know" answers.

Read the Chart: Columns Downward.	Improve Infrastructure	Improve Road Systems	Improve Recreation Facilities	Re-develop Downtown	Improve Quality of Service	Improve Government Communication
Improve Infrastructure		43%	20%	28%	27%	12%
Improve Road Systems	52%		24%	29%	31%	15%
Improve Recreation Facilities	77%	73%		48%	55%	35%
Re-develop Downtown	69%	69%	49%		53%	38%
Improve Quality of Service	70%	65%	42%	44%		21%
Improve Government Communication	86%	83%	62%	59%	76%	

Key Findings

▶ Service Evaluation

- ▶ **Overall**, positive service ratings, with one “lightning rod” problem area:
 - **Roads (Condition & Traffic)**

- ▶ **Overall service satisfaction** (80%) is high, but moderate.
 - Therefore, Room for improvement.
 - However, rating matches Provincial & Regional benchmarks.

- ▶ **Important Services**: Majorities consider every service important.
 - 8-in-10 for all but Leaves (69%), Trails/Paths (69%), & Arenas (63%)
 - *Most Important*: Roads & Snow Removal

- ▶ **User Satisfaction**: Majorities satisfied with every service except...
 - Road Condition (40%), Traffic (44%), & Snow Clearing/Sidewalks (46%)

- ▶ **Gap Analysis - Most Important w/ Least Satisfaction**:
 - Key Areas of Improvement are: Road Condition (-57), Traffic (-44), Snow Clearing/Sidewalks (-36), and Snow Clearing/Roads (-35).

Key Findings

▶ Service Delivery & Budgeting Options

▶ Service Levels

- Majority (54%) want to Maintain Services, vs. 41% want to Increase
- Just 1% want to Reduce

▶ Top Service Improvements, or Reason for Increased Demand (among 41%):

- Primary: Roads
- Secondary: Snow Removal

▶ Budgetary Principles:

- Within Budgetary Context...
 - 62% prefer Maintaining/Increasing Services
 - with a Plurality (44%) preferring to do so via **User Fees**
- 6-in-10 (58%) support **Contracting-Out** to Reduce Delivery Costs

Key Findings

▶ Public Priorities

▶ Top-of-Mind Public Issues Agenda

- By far, the “lightning rod” issue is **Roads** (+29 over 2nd Issue)

▶ Ranking the 6 Strategic Priorities, 2004-2006

- Primary Tier: Improve Infrastructure (Roads/Sewers)
Improve Road Systems to Reduce Traffic
- Secondary Tier: Improve Quality of Municipal Services
Re-Develop Downtown
Improve Community Recreational Services
- Tertiary Tier: Improve Gov’t Communications/Consultations



MEMBER GALLUP
INTERNATIONAL ASSOCIATION

June-July
2005



City of Niagara Falls

Service Satisfaction & Priority-Setting Study

Presented on October 17, 2005 by:

Craig Worden
Associate Vice President, Public Affairs
cworden@legermarketing.com

Toronto

Montreal

Edmonton

New York