



OAKVILLE

2017 Town of Oakville Citizen Survey

Report of Findings

February 2017

POLLARA 
STRATEGIC INSIGHTS

Contents

	Page
Methodology	3
Key Findings	4
Livability	9
Satisfaction with the Town and Services	14
Priorities and Planning	24
Contact with the Town	35
Around the Town	43

Methodology

- **In January 2017, The Town of Oakville contacted Pollara to again conduct a survey of residents regarding the following:**
 - Satisfaction with Town government, initiatives, and local and area services, including ratings of customer service attributes on interactions between Town staff and residents;
 - Priorities for future planning for the Town of Oakville government;
 - Policy preferences on portfolios including Oakville’s local environment, infrastructure, recreation & culture programs, transit, governance, and managing growth; and
 - Recent municipal election participation, and the impact online voting would have on future voter intention;
- **In order to gather the opinions of local residents in the most comprehensive and efficient way, Pollara conducted a 20-minute telephone survey among 805 randomly-selected residents of the Town of Oakville, between and January 26 and February 3, 2017. Sampling employed a quota structure, to ensure a sufficient sample size in each ward to render statistically reliable data.**
- **Responses were weighted according to the ward, and age and gender distributions throughout the Town to the most recently available census data, rendering an overall margin of error of $\pm 3.45\%$, nineteen times out of twenty. Margins of error for ward populations are illustrated in the chart below:**

	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6	Total
Sample Size	107	110	106	222	154	106	805
Margin of Error	$\pm 9.5\%$	$\pm 9.3\%$	$\pm 9.5\%$	$\pm 6.6\%$	$\pm 7.9\%$	$\pm 9.5\%$	$\pm 3.45\%$

Key Findings

POLLARA 
STRATEGIC INSIGHTS

Key Findings: Livability

- **When asked top-of mind about the most important issue facing the Town of Oakville, residents indicated most often that urban sprawl and development was at the top of the list. Historically, this issue has shown declining importance. However, that has changed this year, with an increase in its relevance among residents.**
 - This issue, at 20%, is chosen twice as often as the two next most important issues (traffic and congestion at 11% – tied for first place in 2015 - and affordable housing at 9%.)
 - While affordable housing was significantly more important in 2017 than in previous years, the importance of taxes continued its steady decline seen since 2011 (13%; 10% in 2013; 9% in 2015 and 6% in 2017.)
- **Putting aside these issues, residents prefer Oakville over other areas in the GTA when it comes to livability.**
 - While livability saw a decline in 2015, it has remained stable this year.
- **What makes Oakville livable are mainly its parks, recreation and availability of sports and teams, with three in ten residents choosing that feature.**
 - One in five said the small town feel (also) makes it livable; this compares to a tie among these top two features in 2015, at 25%.
- **On the other hand, the top reasons why Oakville may not be as livable as it could be, were all related to housing.**
 - The need for more (affordable) housing, as well as overdevelopment, were mentioned most often as the greatest challenges faced, both rising significantly since 2015 to 15% (from 10% and 6% respectively.)

Key Findings: Satisfaction with the Town and its Services

- **Overall satisfaction with the government of the Town of Oakville is strong, with eight in ten residents saying they are satisfied (of which three in ten say very satisfied.)**
 - However, this is a 6-points decline from 2015 and 2013 levels.
 - Men (33%) are more likely than women (25%) to be very satisfied with the Town's governance, as are those between the ages of 35 and 54 (85%, compared to 78% among those 55+.)
- **Oakville residents remain quite happy with the Town's programs and services, with clear majorities being satisfied with all the elements tested.**
 - The top six attributes are feelings of belonging and safety (95% satisfaction), parks and green spaces (93%), public libraries (88%), recreation facilities (88%), emergency services (85%) and recreation programs (85%.)
 - Satisfaction is up markedly for winter road and sidewalk maintenance since 2015 (to 81%, from 74%).
 - On the other hand, 2017 numbers have declined for both heritage efforts (79%, down 6 points since 2015) and environmental protection efforts (75%, down 5%.)
- **Two thirds of residents have contacted the Town in the past two years, with most inquiries being about services and programs. The Town has once again done a good job when responding to residents.**
 - Those residents who have had recent contact with the town remain highly satisfied with their service experience. Nearly all agree that the information was easy to understand (95%) and that employees were respectful (91%) and knowledgeable (91%). Efforts should continue to focus on dealing with requests in a timely manner and ensuring employees are respectful, as these are the drivers of service satisfaction. While satisfaction scores are high for both, a declined in those rating employees as respectful should be watched to ensure this does not develop into a trend.

Key Findings: Priorities and Planning

- **In its efforts to control growth in Oakville, residents are most likely to prefer the Town's emphasis and budget allocations go to protecting the character of existing neighbourhoods (30%).**
 - Defending the Livable Oakville Official Plan (21%), ensuring housing mixes (20%) and implementing sustainable development standards (18%) make up the second tier.
- **In terms of preferred environmental priorities, protecting and maintaining parks, trails and green spaces comes out on top (43%).**
 - This is followed at a distance by maintaining cleanliness and community appearance (19%.)
- **When thinking of easing traveling around Oakville, residents first and foremost want the Town to focus on adding and widening roads and bridges (29%).**
 - This is the same top priority as measured in the two previous surveys.
 - However, increasing frequency of public transit was also seen as quite important (20%).

CONTEXT:

While almost all residents predict they will use a car to get around town in the next year, walking is the next most popular mode of local transportation, followed by bicycling. Public transit will likely be used by almost four in ten residents. Convenience trumps all other factors when deciding on transportation methods, although the time it takes to reach one's destination is also quite important.

Key Findings: Priorities and Planning (Cont'd)

- **Residents indicated they feel the Town should make fiscal responsibility (streamlining processes to ensure cost efficient delivery of programs and services) and open and accountable government top priorities.**
 - While a quarter of residents picked either of these two options as their preferred priority, one in five chose other items that relate to openness and transparency: opportunities for public input (21%) and improving access to Town information to track performance (18%.)
- **Looking at economic growth, residents first and foremost call on the Town to attract new companies that will create more local jobs (27%.)**
 - However, not all feel that new businesses are the answer: at only 4 points lower, support for current commercial areas ranks second, followed by helping reduce business costs such as electricity and taxes (18%.)
- **Lastly, the top priority for Oakville's recreation and cultural programs is clearly to keep participation costs affordable for all (55%.)**
 - Offering more recreational and cultural programs for specific segments of the population are less often seen as preferred budget allocations in this area.
- **The plurality of residents, four in ten, would like to maintain existing service levels, while almost a quarter would like to see the Town add new services and facilities.**
 - A third of residents do not want to see any tax or user fee increases.
 - When asked how a maintenance or enhancement of services/facilities should be financed, three quarters of those who would like to see this happen, prefer to hike user fees rather than increase property taxes.

CONTEXT:

Three quarters of residents visited a community centre, park or trail at least monthly in the past year, with half visiting weekly or more often. Participation in Town programs weekly or more is done by a quarter, with one in ten doing so monthly and another quarter saying they did so a few times in the past year.

Results in Detail

Livability

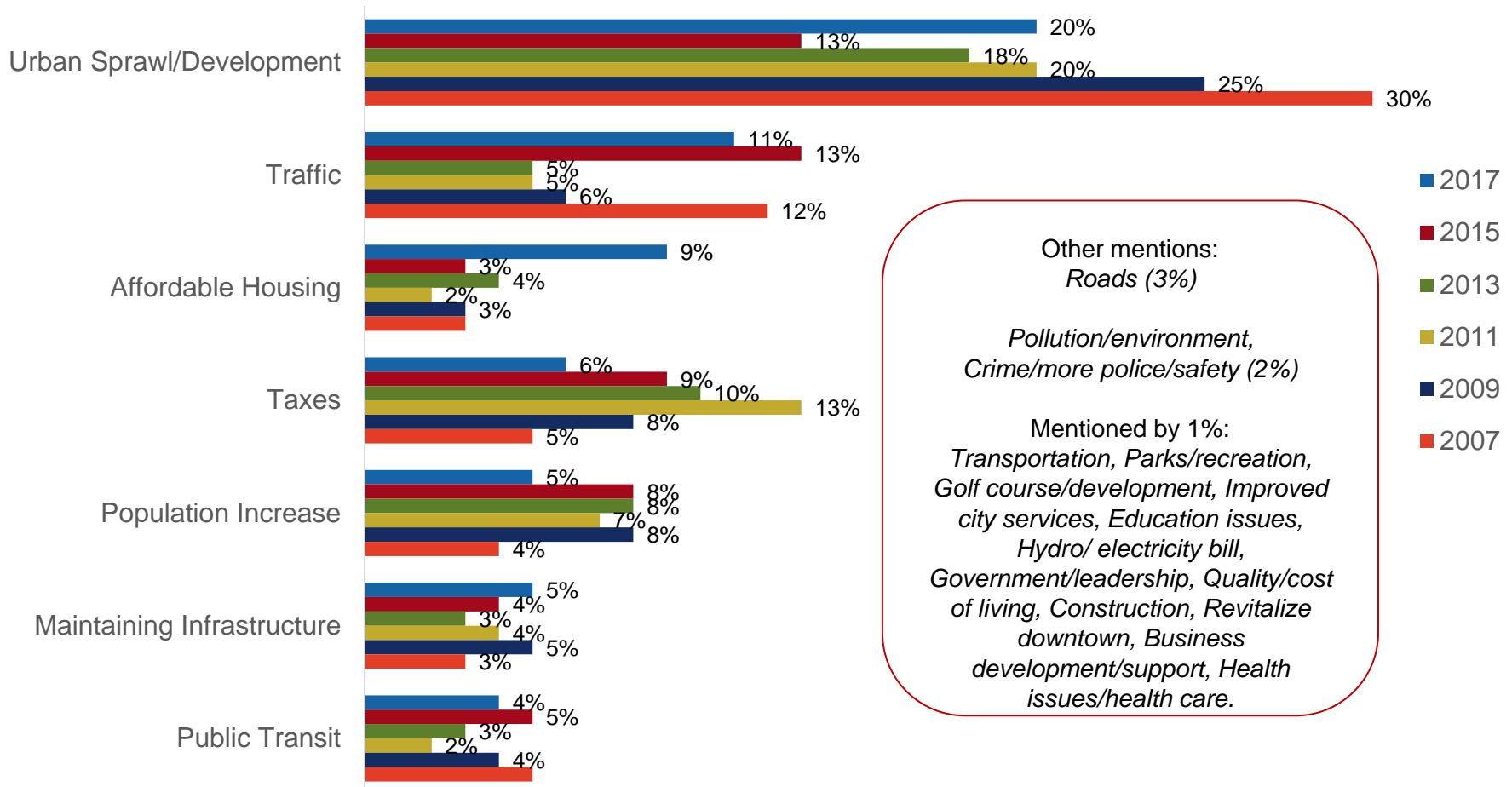
POLLARA 
STRATEGIC INSIGHTS

Issue Context: Most Important Issue

This year, urban sprawl and development jumped ahead of traffic and congestion as the most important issue facing the Town of Oakville. While affordable housing was significantly more important in 2017 than in previous years, the importance of taxes continued its steady decline.

Urban sprawl was particularly important to residents of Ward 6 (26%) and the least important for those in Ward 1 (13%). In Ward 1, however, traffic was the most important factor, along with maintaining infrastructure (18% respectively). Affordable housing was more important than average in Wards 1 and 2 (15% in each).

Younger residents (34 and under) ranked affordable housing (15%) before urban sprawl (9%) and traffic (3%).

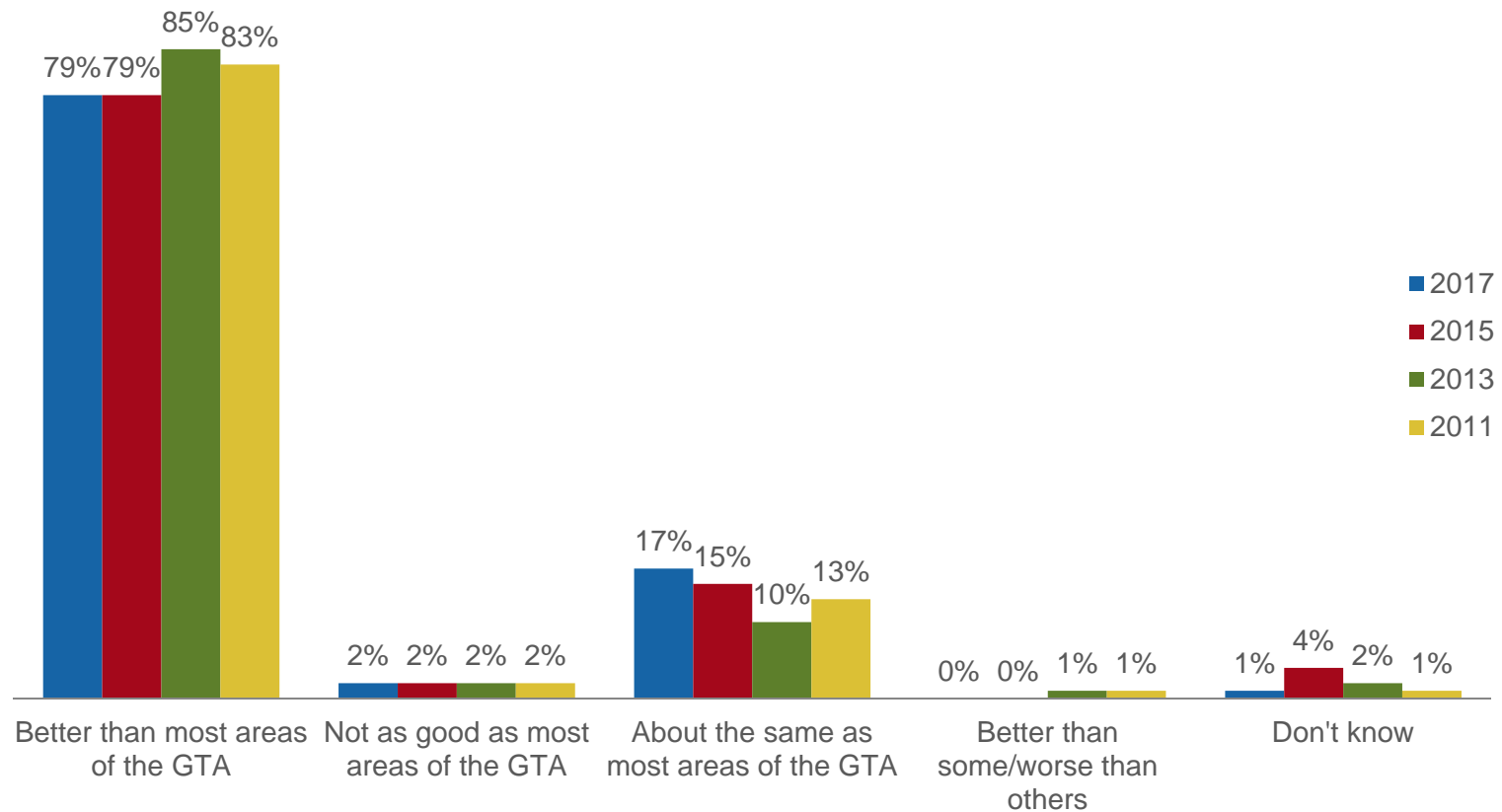


Q1. In your opinion, what is the single most important issue facing the Town of Oakville today? (N=805)

Livability in Oakville compared to rest of GTA

Residents clearly continue to feel that Oakville is more livable than other areas in the GTA.

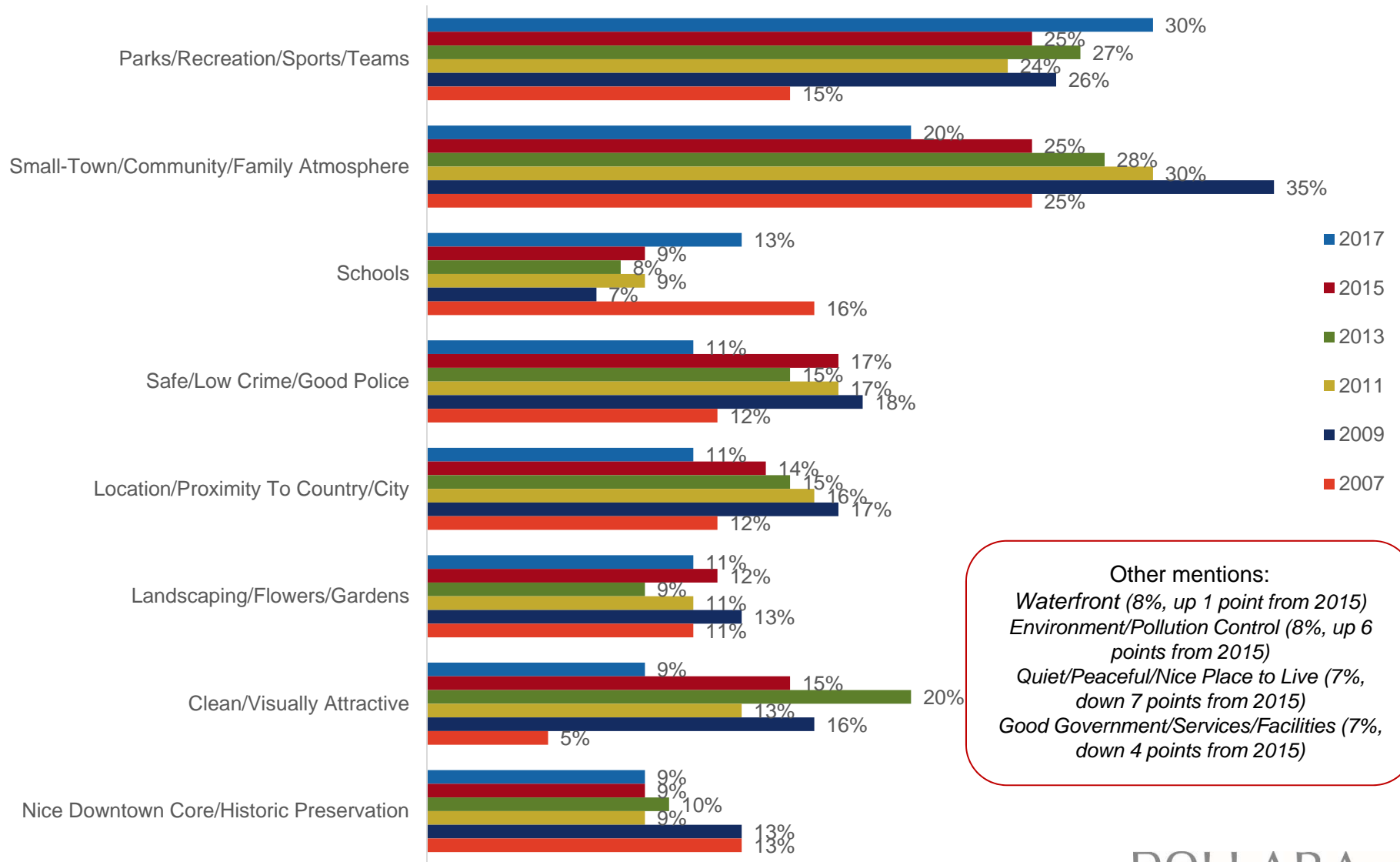
Men, those in the highest income bracket, and residents of Ward 3 (85% respectively) are the most likely to feel Oakville tops other areas in the GTA, while those in the lowest income group (61%), residents of Ward 1 (71%), and women (75%) are the least likely to feel this way.



Q5. Thinking about Oakville as a place in which to live, would you say that the degree of livability in Oakville is generally... (N=805)

Qualities that make Oakville Livable

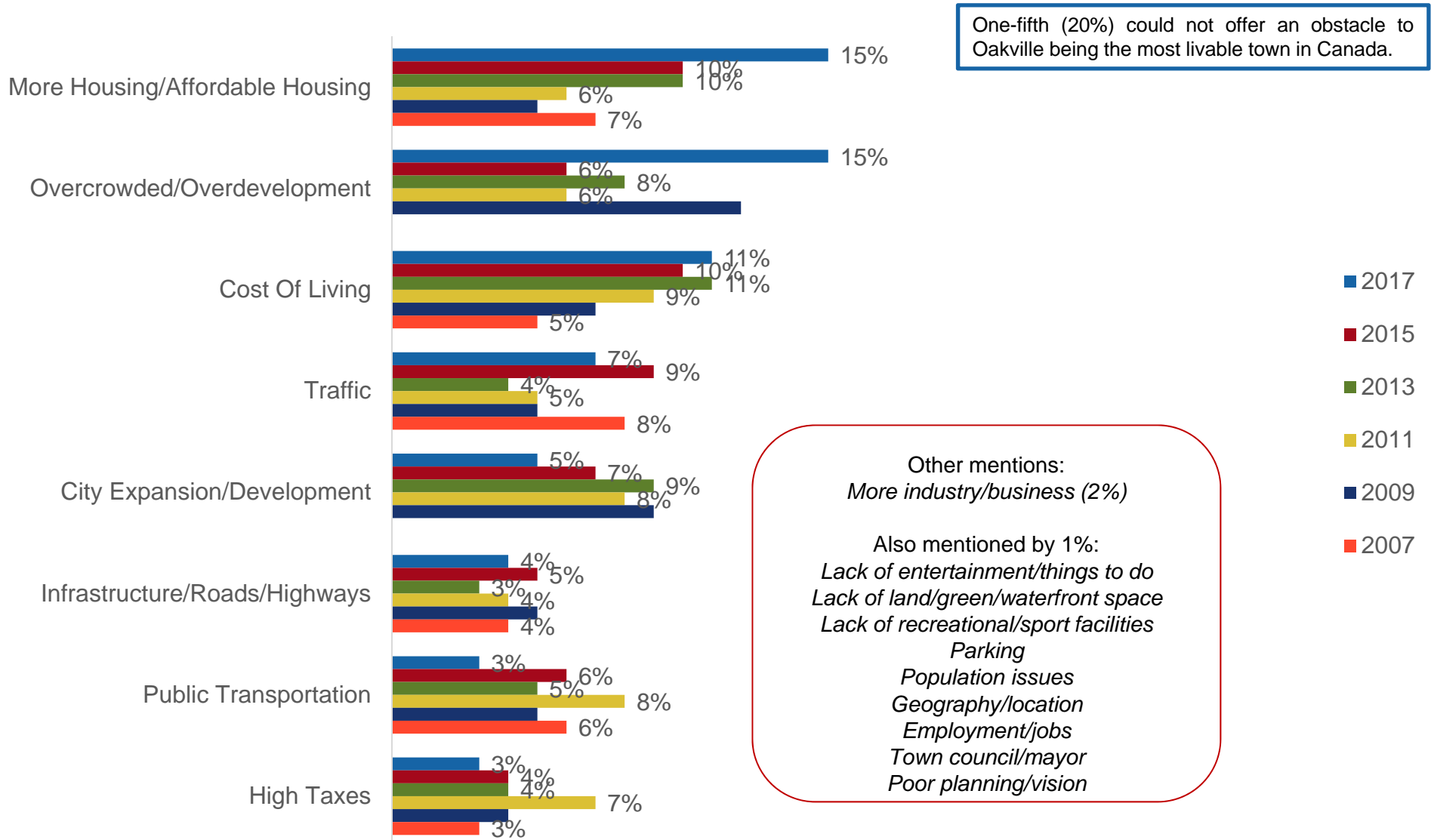
Residents clearly chose Oakville's parks, recreations and availability of sports (teams) as the top livability feature in 2017; while three in ten chose that quality, two in ten said the small Town feel (also) makes it livable. This compares to a tie among these features in 2015. Mentions of schools rose since last year, while safety and cleanliness were mentioned less often.



Q3. What are the qualities or features of the Town of Oakville that make it livable? (N=805; multiple response variable)

Obstacles to Being Most Livable Town in Canada

Housing-related issues rose to the top reasons for Oakville not reaching its full potential in terms of livability: Both the lack of affordable housing and overdevelopment were mentioned most often as the greatest challenges faced, both rising significantly since 2015 to 15% (from 10% and 6% respectively).



Q4. What is the greatest challenge that prevents the Town of Oakville from being the most livable Town in Canada? (N=805); Multiple Response variable)

Satisfaction with the Town and Services

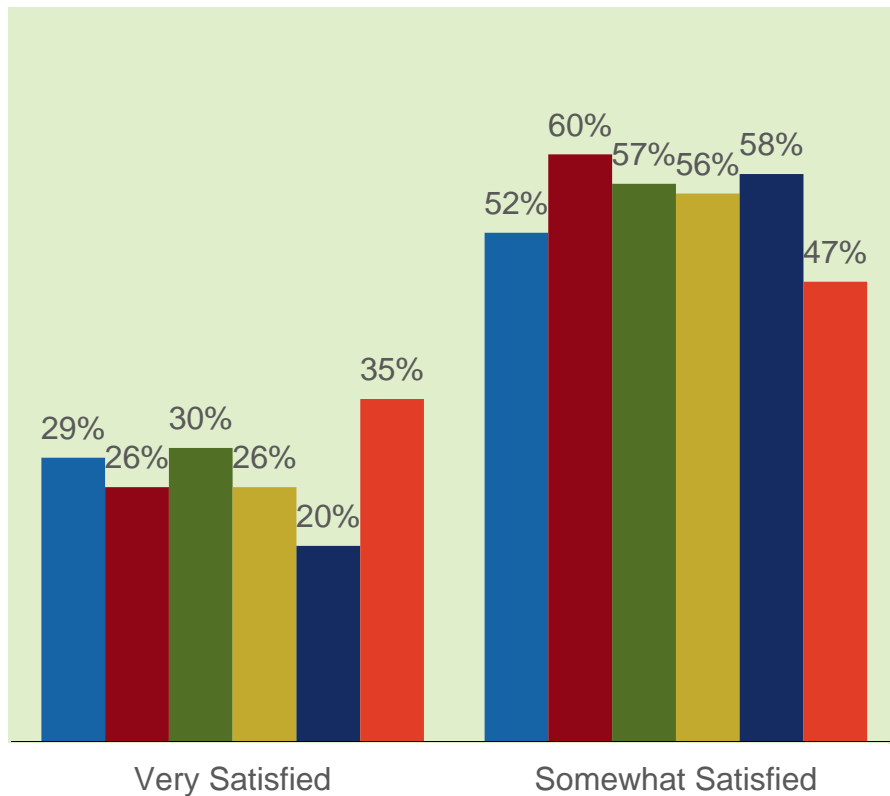
POLLARA 
STRATEGIC INSIGHTS

Overall Satisfaction with Government of the Town of Oakville

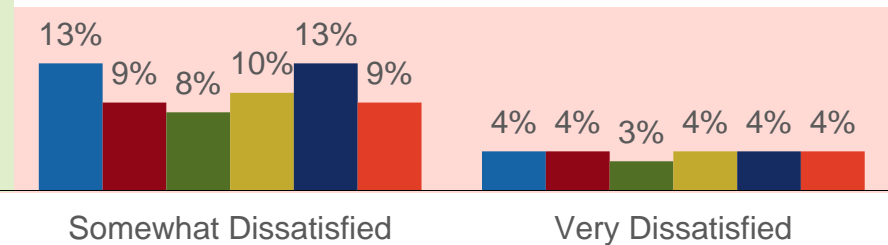
While a large majority of residents (eight in ten) are generally satisfied with Oakville's government, satisfaction declined by 6 points since 2015.

Total Satisfied					
2017	2015	2013	2011	2009	2007
81%	87%	87%	86%	78%	82%

Those in Wards 1, 2 and 6 are most likely to say that they are satisfied (88%, 85% and 85%, respectively), while those in Ward 3 (73%) are least satisfied.



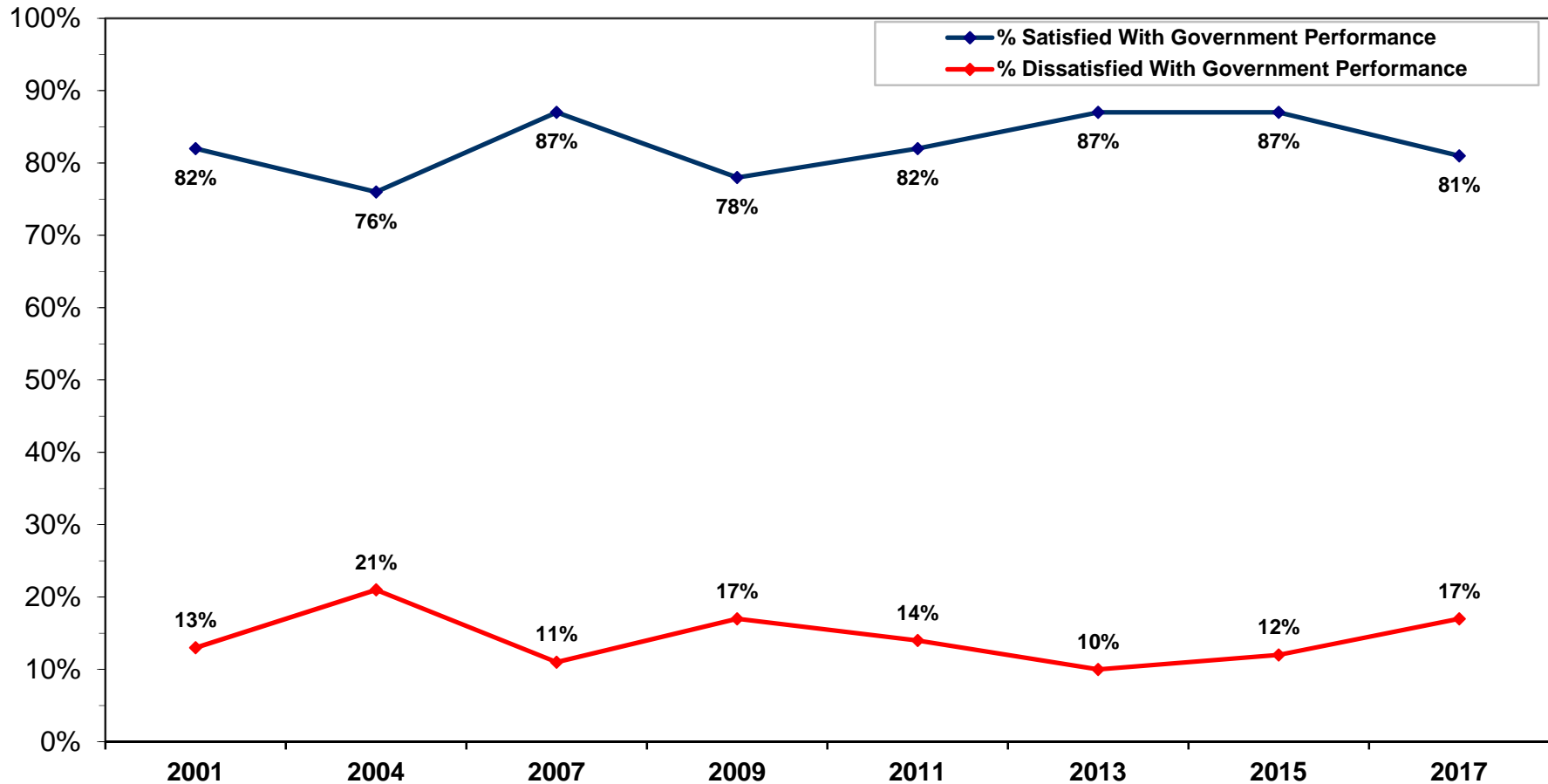
Total Dissatisfied					
2017	2015	2013	2011	2009	2007
17%	13%	11%	14%	17%	13%



Q2. Overall, would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the Town of Oakville government? (N=805)

Overall Satisfaction with the Town of Oakville (Tracking)

Satisfaction is similar in 2017 to levels seen in 2001 and 2011, down from highs seen in 2007, 2013 and 2015.



Q2. Overall, would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the Town of Oakville government?

Overall satisfaction with government of the Town of Oakville, by gender, age, and income groups

○ Denotes significant higher percentage; □ Denotes significant lower percentage within subgroups.

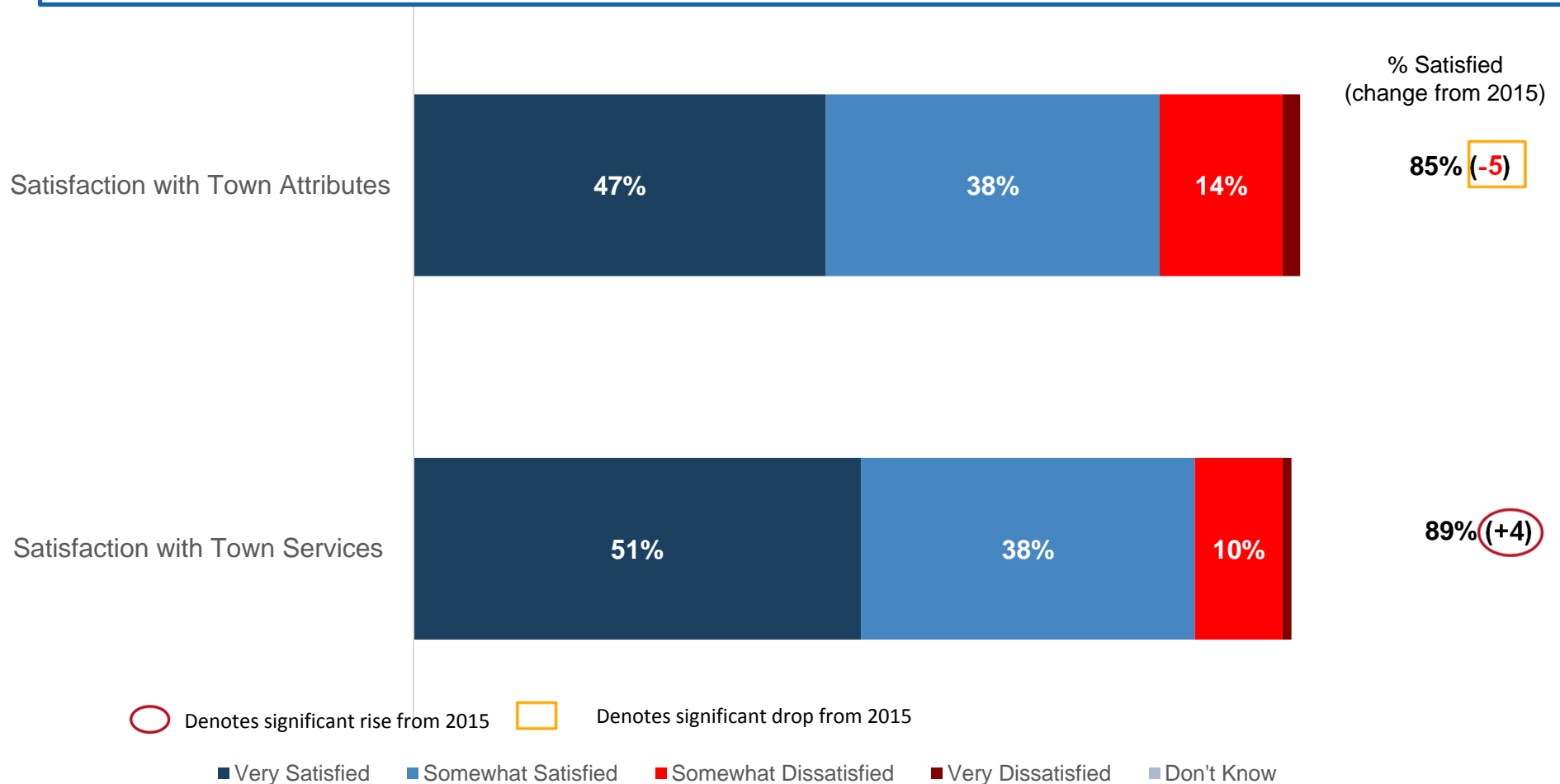
	Total	Gender		Age			Income				
		Men	Women	18-34	35-54	55+	HHI \$30K or less	HHI \$30K-\$70K	HHI \$70K-\$110K	HHI \$110K-\$150K	HHI \$150K+
Total Satisfied	81%	81%	80%	76%	85%	78%	68%	78%	90%	87%	77%
Very Satisfied	29%	33%	25%	39%	24%	27%	29%	35%	44%	35%	20%
Somewhat satisfied	52%	48%	55%	36%	61%	51%	38%	43%	46%	52%	56%
Total Dissatisfied	17%	18%	16%	22%	13%	19%	32%	19%	8%	8%	23%
Somewhat dissatisfied	13%	13%	13%	19%	10%	12%	20%	11%	5%	7%	20%
Very Dissatisfied	4%	4%	4%	2%	3%	7%	11%	8%	2%	1%	3%

Q2. Overall, would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the Town of Oakville government?

Satisfaction with Town Attributes and Services

Oakville residents remain quite happy with both Town attributes and Town services. Satisfaction with Town attributes has dropped by 5 points since the previous survey while satisfaction with Town services rose by 4 points.

Most satisfied with Town attributes are residents of Ward 2 (95%), 1 (94%) and 6 (92%) while those in Ward 3 (77%), 4 and 5 (80% respectively) are least satisfied. When it comes to satisfaction with Town services, Ward 3 residents (78%) are significantly less likely to be satisfied than those in all other Wards (showing between 89% and 96% satisfaction. Women and those aged 35-54 (93%) are more likely to be satisfied than men and those 55+ (86%).

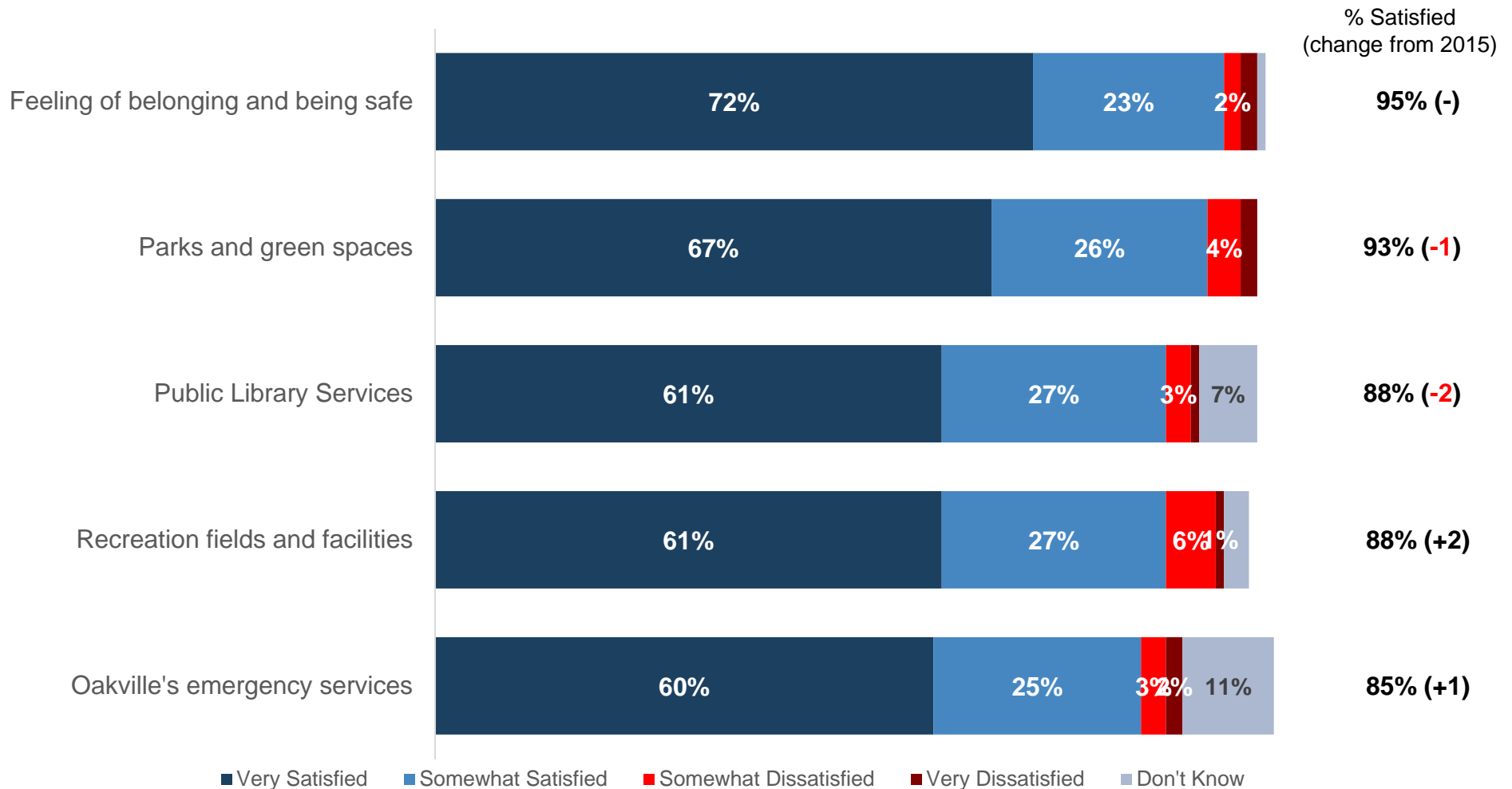


Q6-Q25. How satisfied are you with the following...? What about...? (N=805 for each).

Satisfaction with Town Programs and Services – Top five mentions

Oakville is generally doing well in the eyes of its residents, with the majority being satisfied with all attributes and services tested. Highest rated are once again belonging and safety, parks and green spaces, public libraries, recreation facilities and emergency services. Virtually no change was measured on these attributes since the 2015 survey.

Men (98%) are more likely than women (94%) to be satisfied with their sense of neighbourhood belonging and safety; women on the other hand are happier than men about public library services (93% vs 85%) and recreation facilities (91% vs 86%).

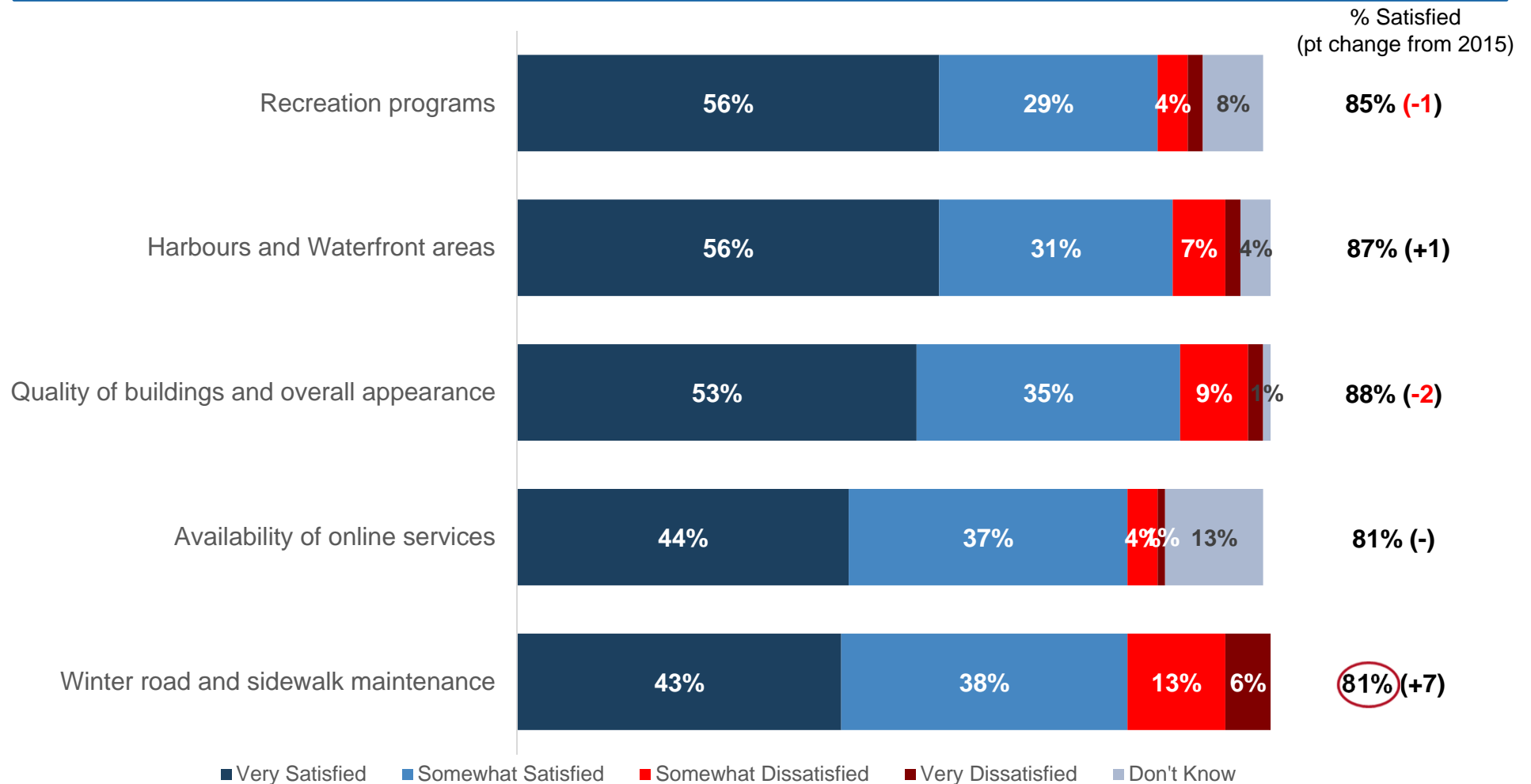


Q6-Q25. How satisfied are you with the following...? What about...? (N=805 for each).

Satisfaction with Town Programs and Services – Second tier mentions

Large majorities remain satisfied with recreation programs, the harbour and waterfront, quality and appearance of buildings, online services and winter road maintenance. Satisfaction with the latter is up markedly since 2015.

Significantly more women (90%) than men (85%) are satisfied with the Town's buildings and appearance; the same is true of those between the ages of 35-54 (92% compared to 83% among those older than 54). Along them same lines, when commenting on online services, women (85%) and those 35-54 (87%) are more satisfied than men (77%) and older Town residents (71%).

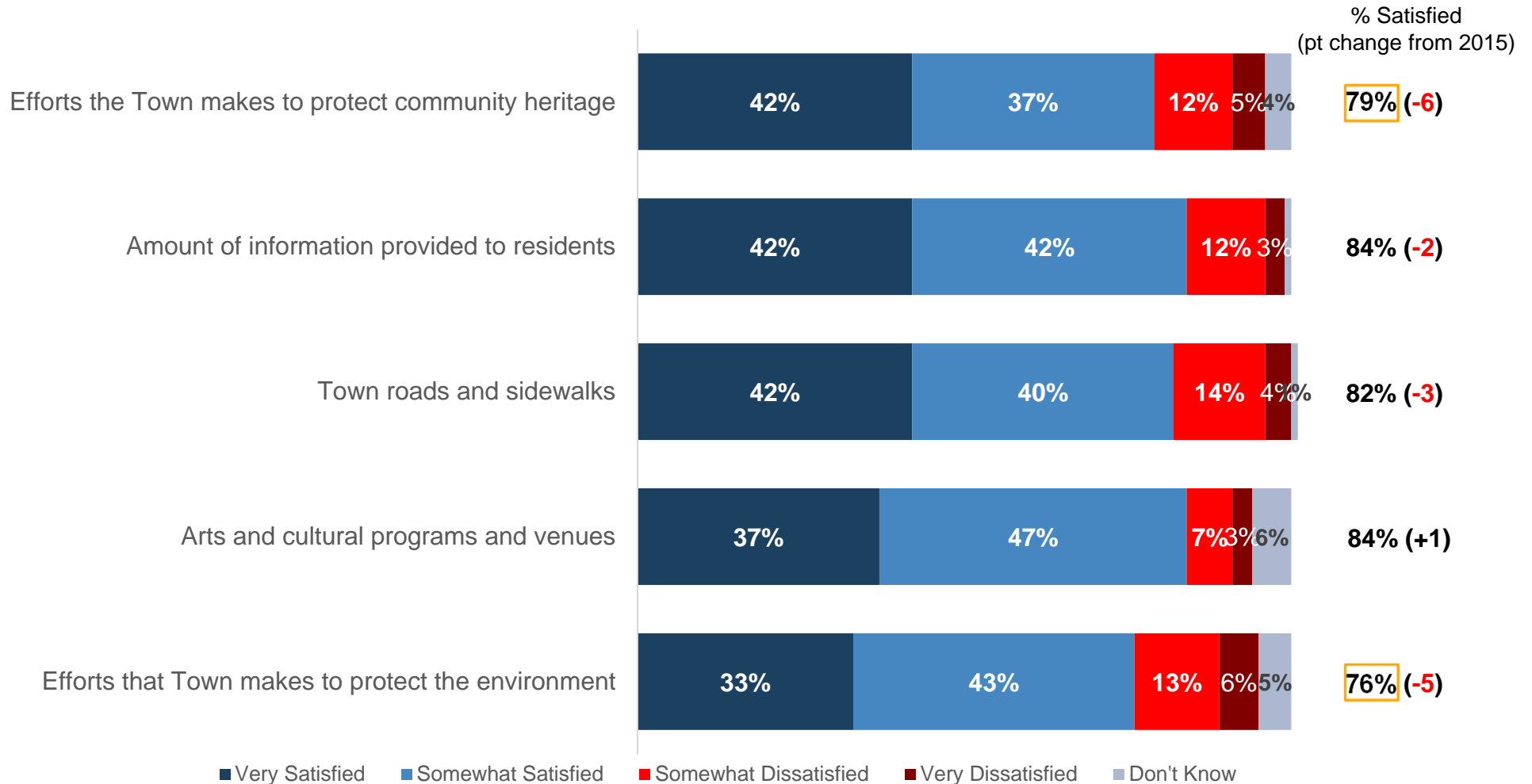


Q6-Q25. How satisfied are you with the following...? What about...? (N=805 for each).

Satisfaction with Town programs and services – Third tier mentions

While overall satisfaction is still quite high among third tier attributes of the Town, less than half of residents are very satisfied with heritage protection (down significantly since 2015), information sharing, roads and sidewalks, arts and culture and environmental protection (also down significantly.)

Satisfaction with arts and cultural programs and venues is higher among women (90%) than men (77%).

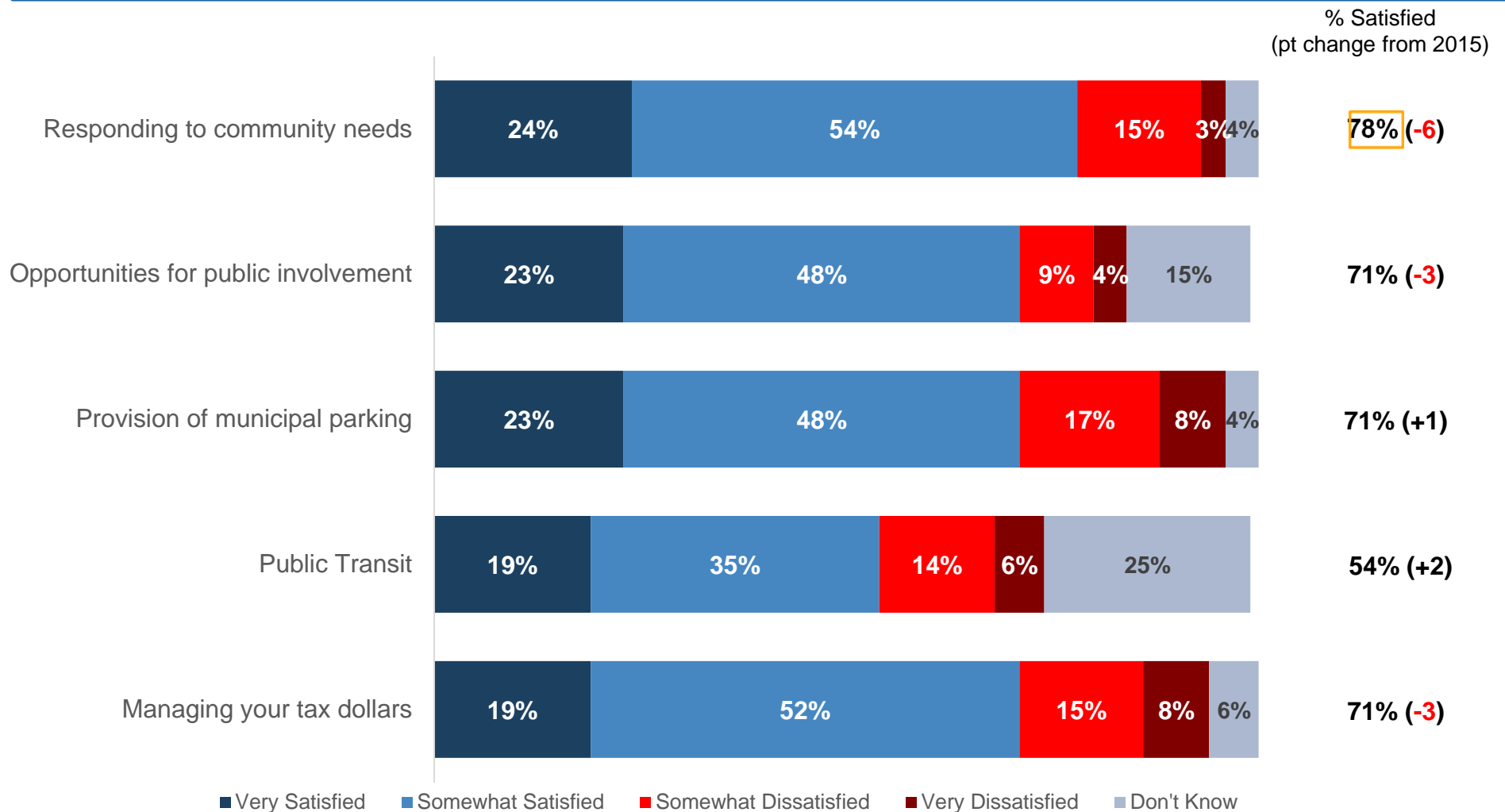


Q6-Q25. How satisfied are you with the following...? What about...? (N=805 for each).

Satisfaction with Town programs and services – bottom 5 mentions

Satisfaction is generally lowest with responses to community needs, opportunities for public involvement, parking, public transit and managing the public purse. The highest level of dissatisfaction can be seen for public parking (25%), managing tax dollars (23%) and public transit (20%).

Older residents 55 years of age and over, tend to be less likely to be satisfied with municipal parking (64%) than those between 35 and 54 years of age (74%).



Q6-Q25. How satisfied are you with the following...? What about...? (N=805 for each).

Satisfaction with Town programs and services – by ward

Note: Ward base sizes are between 106 and 222, with associated margins of error between +/-9.5% and +/-6.6% , 19 times out of 20. This means that sub-group differences (between wards) are often only statistically significant if greater than 10%.

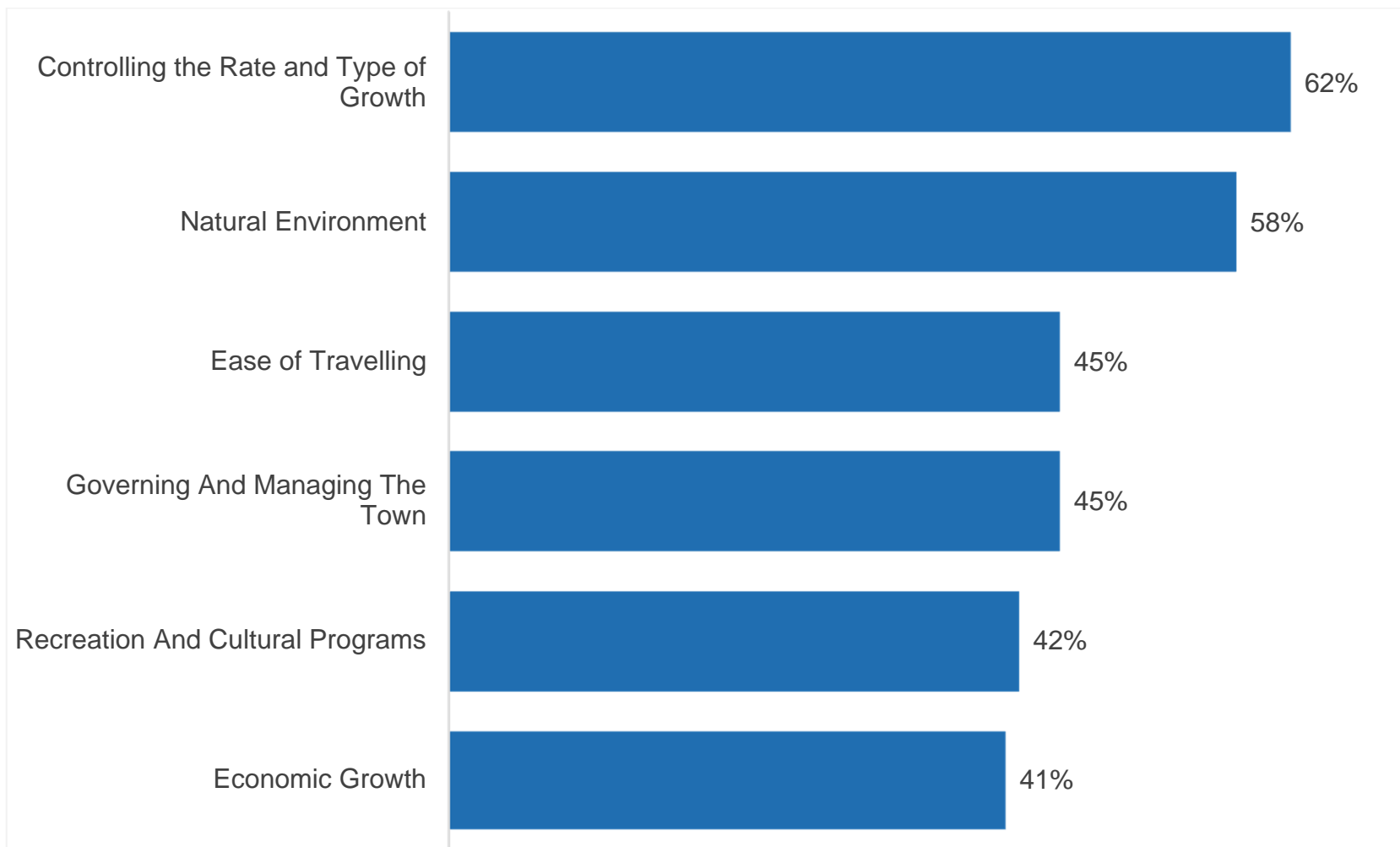
	Overall	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6
Feeling of belonging and being safe	95%	100%	92%	98%	92%	99%	95%
Parks and green spaces	93%	93%	94%	93%	92%	96%	95%
Public Library Services	88%	95%	94%	88%	86%	86%	90%
Recreation fields and facilities	88%	92%	87%	73%	93%	90%	90%
Oakville's emergency services	85%	88%	91%	88%	79%	86%	81%
Recreation programs	85%	94%	85%	77%	84%	87%	91%
Harbours and Waterfront areas	87%	94%	91%	84%	85%	87%	86%
Quality of buildings and overall appearance	88%	96%	91%	79%	88%	87%	88%
Availability of online services	81%	81%	78%	87%	82%	81%	79%
Winter road and sidewalk maintenance	81%	86%	88%	73%	85%	77%	74%
Efforts the Town makes to protect community heritage	79%	75%	90%	77%	75%	73%	89%
Amount of information provided to residents	84%	90%	93%	87%	83%	74%	82%
Town roads and sidewalks	82%	78%	87%	71%	84%	79%	88%
Arts and cultural programs and venues	84%	94%	91%	74%	82%	83%	84%
Efforts that Town makes to protect the environment	76%	71%	80%	75%	73%	77%	87%
Responding to community needs	78%	90%	90%	69%	76%	72%	78%
Opportunities for public involvement	71%	66%	79%	87%	66%	71%	64%
Provision of municipal parking	71%	80%	74%	62%	73%	66%	77%
Public Transit	54%	55%	66%	63%	42%	54%	57%
Managing your tax dollars	71%	75%	78%	61%	71%	68%	78%

Priorities and Planning

POLLARA 
STRATEGIC INSIGHTS

Number of Times Each Priority is Selected


Controlling growth and Oakville's natural environment remain the two most-often selected priorities. Further, they continue to be chosen in the same proportion since 2011.



Q26-41. Tabulation of the total results of the pairwise testing; % wins based on number of times selected out of total number of times shown.

Priority Sequence: Survey Results

Read down the columns: e.g. when “Oakville’s Natural Environment” paired with “governing and managing the Town” 59% of respondents chose “Natural Environment”; “Wins” circled in red.



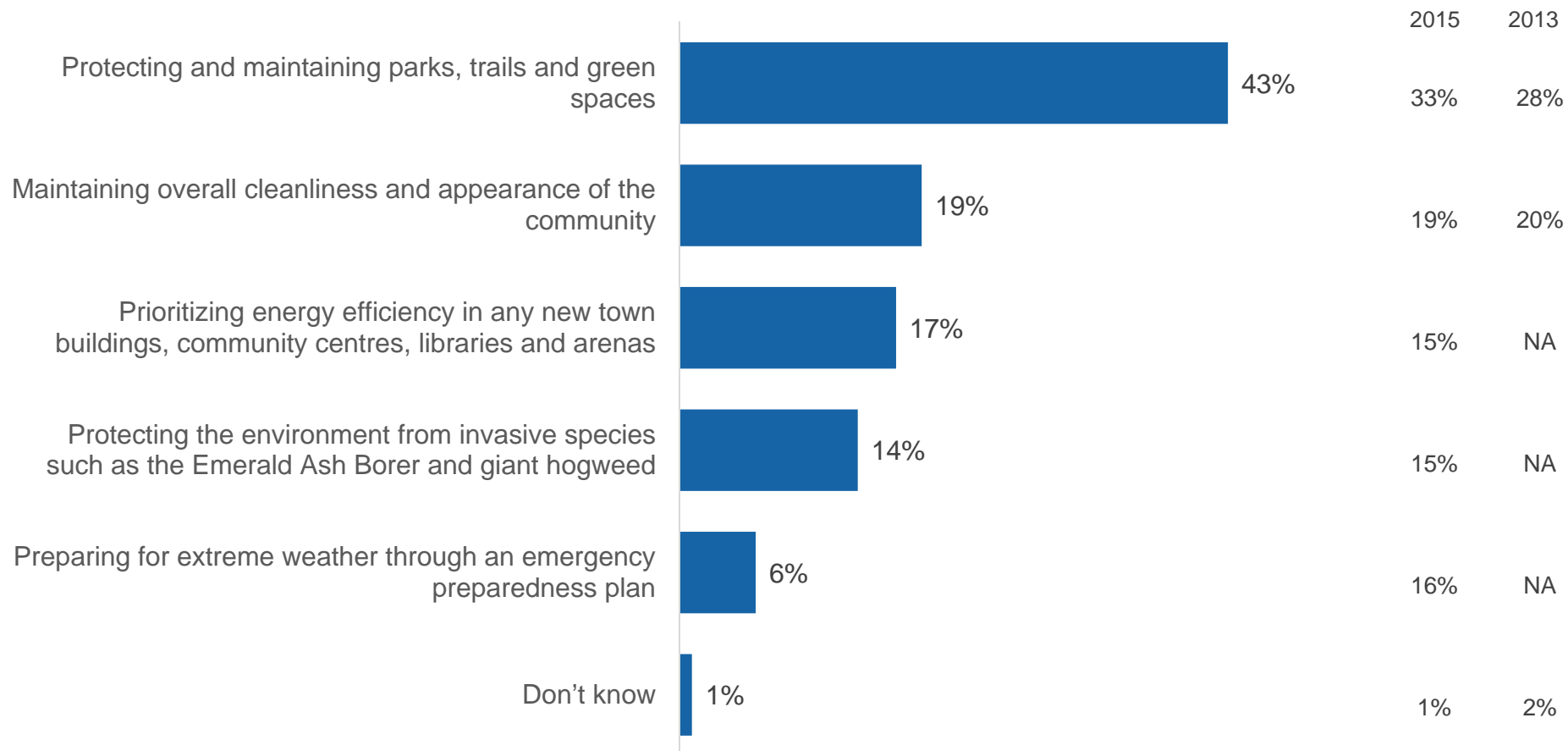
	Oakville's Natural Environment	Governing and Managing the Town	Controlling the Rate and Type of Growth	Oakville's Economic Growth	Recreation and Cultural Programs	Ease of Traveling
Oakville's Natural Environment	-	39%	53%	32%	30%	42%
Governing and Managing the Town	59%	-	63%	44%	48%	52%
Controlling the Rate and Type of Growth	44%	36%	-	34%	33%	31%
Oakville's Economic Growth	67%	53%	64%	-	55%	45%
Recreation and Cultural Programs	66%	50%	65%	43%	-	53%
Ease of Traveling	55%	46%	67%	54%	45%	-

Q26-41. Tabulation of the total results of the pairwise testing; % wins based on number of times selected out of total number of times shown.

Oakville's Natural Environment: Top Priority

As was seen in the previous two surveys, residents prefer that the Town makes protecting and maintaining parks, trails and green spaces its top priority when it comes to its natural environment; this measure was chosen more than twice as often as the next most popular option (maintaining cleanliness and community appearance.)

Protecting and maintaining parks is most important among fully half of Ward 4 and 5 residents (53% and 50%, respectively.) In Ward 1, energy efficiency is the top priority (34%), followed by cleanliness and appearance (25%) and protection of parks (21%). In Ward 2, maintaining cleanliness (31%) and protection of parks (29%) are a virtual tie for the top spot. There are no other notable demographic differences.

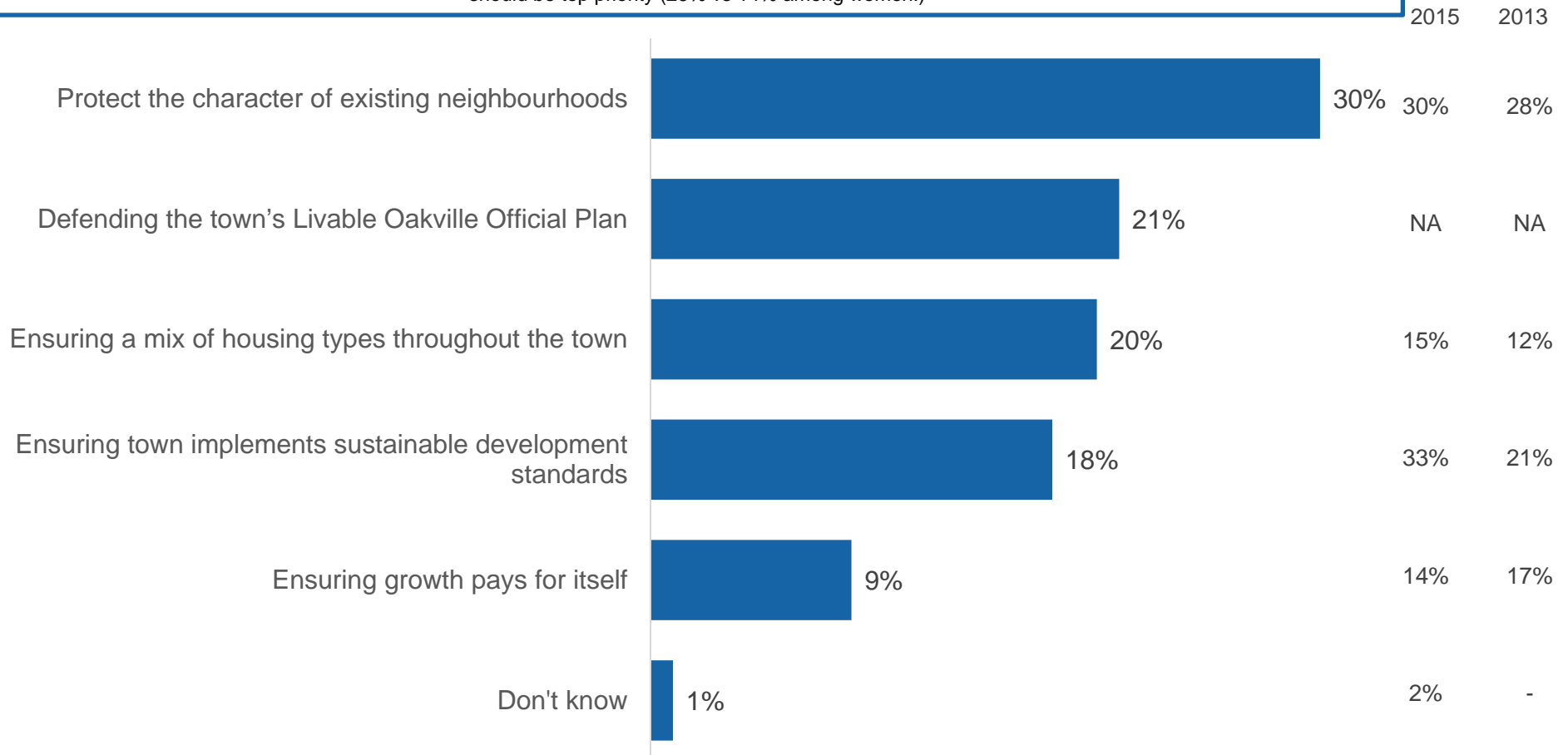


Q41: Thinking about Oakville's natural environment, which one of the following would you most prefer the Town make its top priority when allocating budget funds in this area? (N=406)

Controlling the Rate and Type of Growth in Oakville: Top Priority

Protecting the character of existing neighbourhoods is the preferred way for the Town to control growth. This is followed by defending the Livable Oakville official plan, ensuring housing mixes and implementing sustainable development standards. The latter was most likely to be preferred in previous years.

Housing mix (including rentals and seniors residences) ranks number one in Ward 1 (29%) and Ward 5 (27%.) The importance of this item goes up by age, from 12% among the youngest cohort, to 32% among those 55+. In Ward 3, protecting the existing character (40%) and the Livable Oakville Official Plan (35%) are significantly more likely to be the top priority. In Ward 6, sustainable development outranks all other priorities at 28%. While protecting Oakville's character is more important to women (38% vs 23% among men), men are more likely to believe that the Town's Official Plan should be top priority (26% vs 14% among women.)

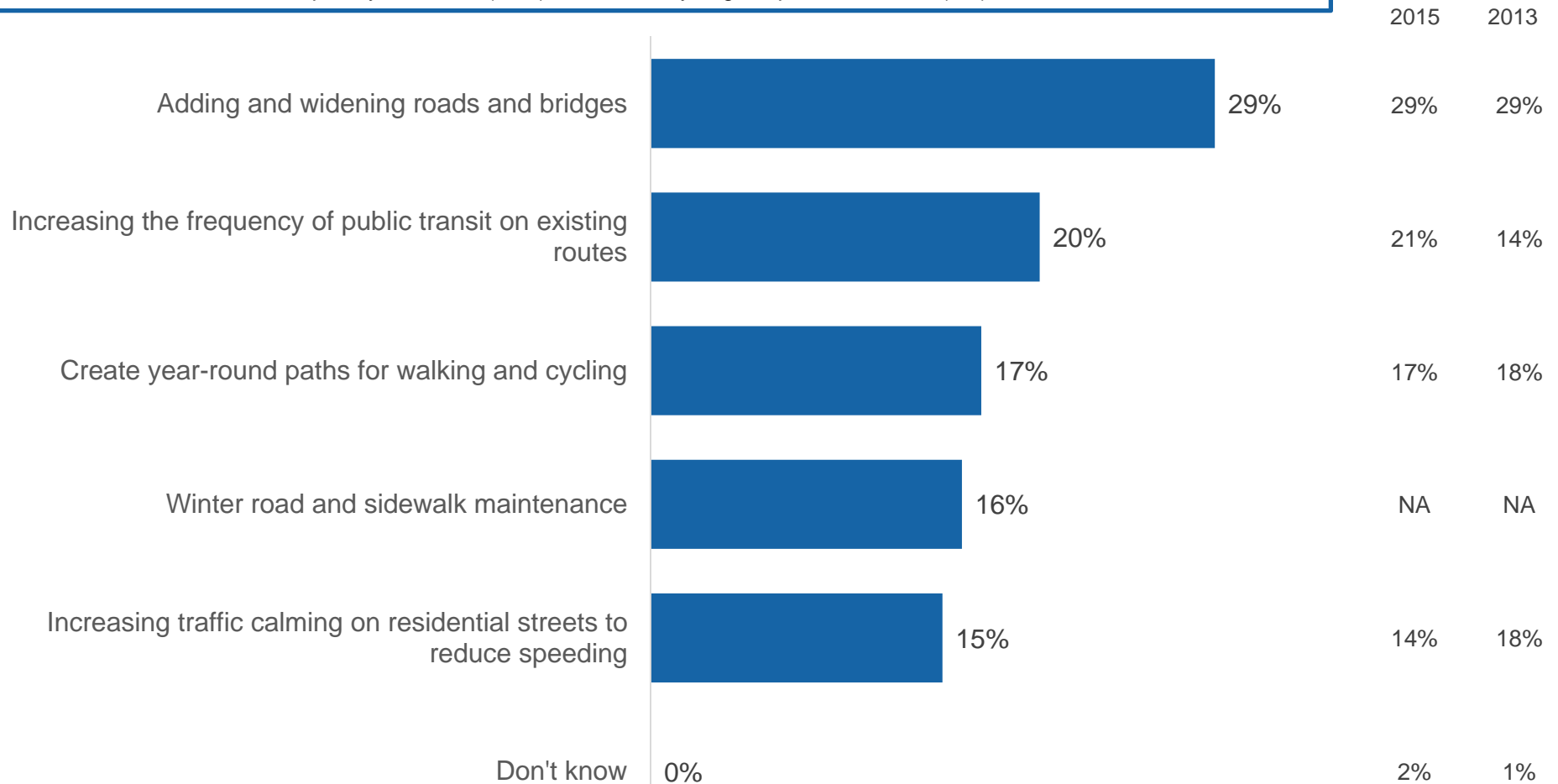


Q62. Thinking about controlling the rate and type of growth in Oakville, which one of the following would you most prefer the Town make its top priority when allocating budget funds in this area? (N=399)

Ease of Travelling Around Oakville: Top Priority

As was seen in the past two waves of the survey, adding and widening roads and bridges was seen as the preferred top priority for the Town when allocating funds to enhancing ease of traveling. This was once again chosen by three in ten residents. Increasing the frequency of public transit followed; it was preferred by one in five.

Adding and widening roads is more important than average in Ward 1 (42%) while in that area, winter road and sidewalk maintenance ranks second (20%). In Ward 2, on the other hand, roads and bridges (19%) are less important than public transit (29%). Public transit and roads are in a statistical tie for top spot in both Wards 5 and 6. Year round walking paths are more likely to be seen as a top priority in Ward 3 (23%) and less likely to get top nod in Ward 6 (7%).

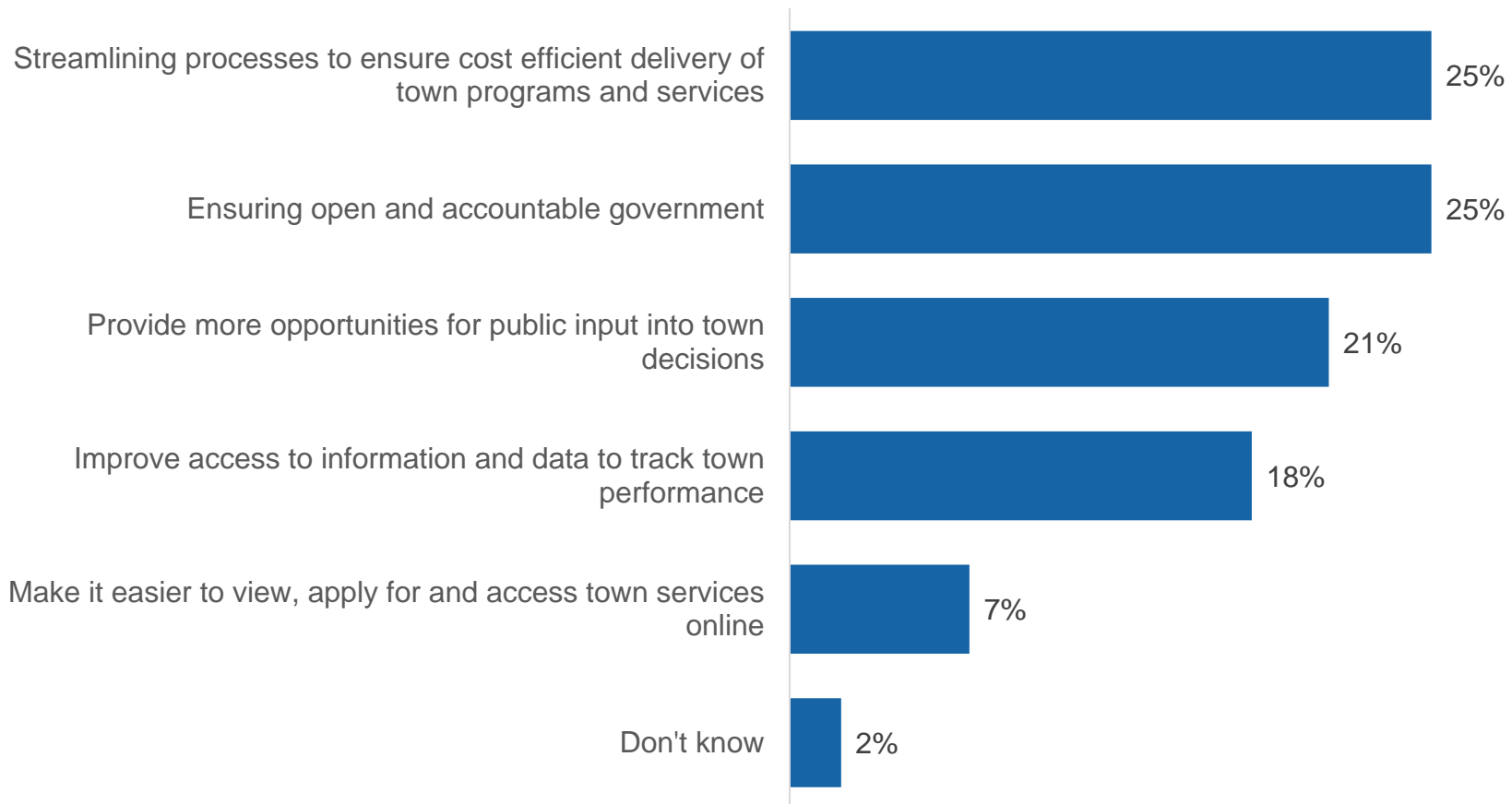


Q53: Thinking about the ease of travelling within Oakville, which one of the following would you most prefer the Town make its top priority when allocating budget funds in this area? (N=399)

Governing and Managing Oakville: Top Priority

Oakville residents care about fiscal responsibility and open government: They place the highest priority equally on streamlining processes in order to be more cost efficient and on open and accountable government, with a quarter of residents preferring either one of these two options as the Town's top priority.

In Ward 2, cost efficiency clearly ranks first (42%), while openness and accountability (17%) is tied for second place with online access to town services (18%). At the same time, residents of Ward 5 feel the highest emphasis should be places on openness and accountability (37%) while public input (18%) and cost efficiency (18%) are tied for second in this area. More public input ranks highest in Ward 3 (33%), where access to performance data (30%) ranks close second. Online services are not seen as important priorities in Ward 3 (1%) and Ward 2 (2%). That latter measure is significantly more important among those aged 34-54 (12% vs 5% among those 55+)

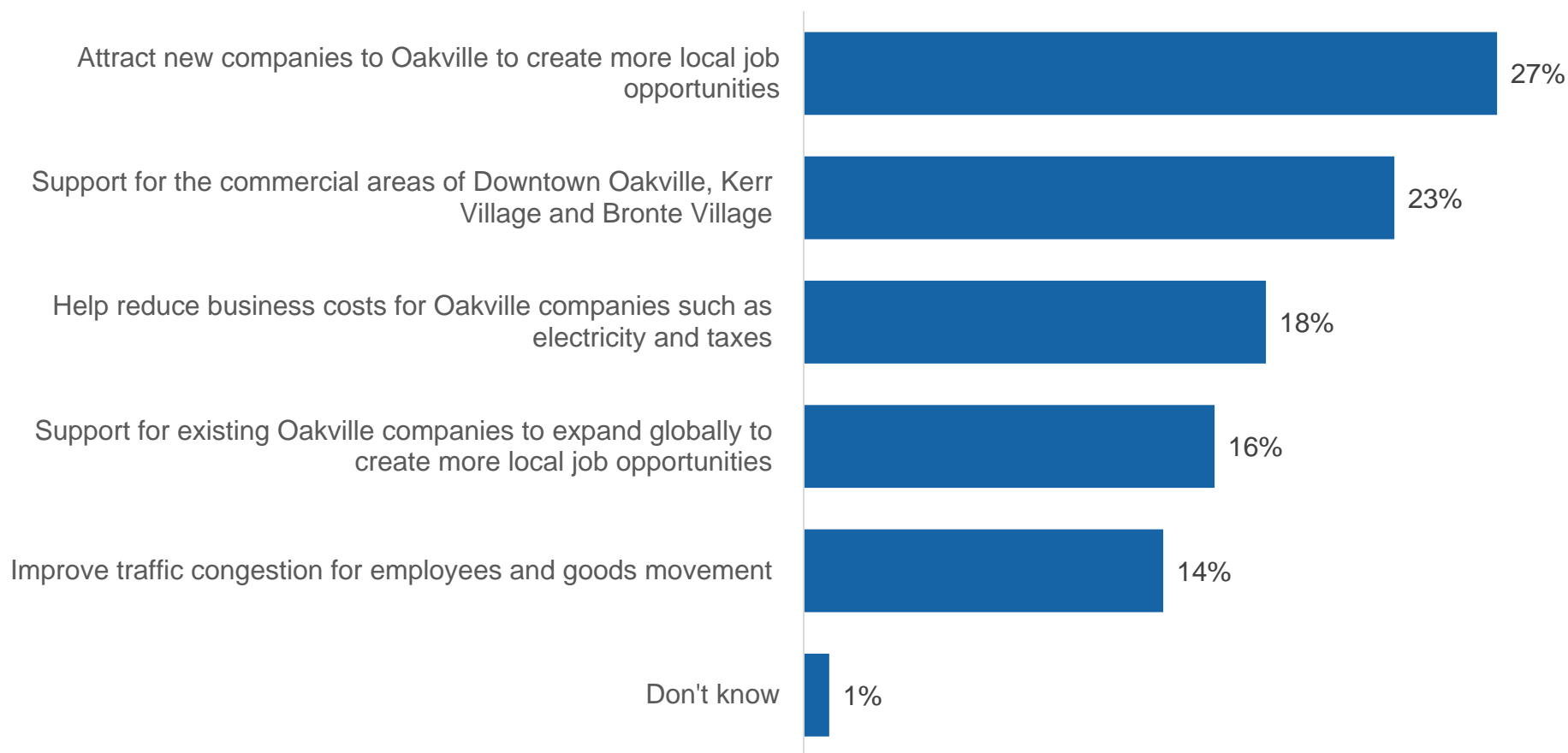


Q61: Thinking about governing and managing the Town of Oakville, which one of the following would you most prefer the Town make its top priority when allocating budget funds in this area? (N=399)

Oakville's Economic Growth: Top Priority

When it comes to priorities for economic growth, residents are divided about where the Town should spend its budget. The largest proportion of residents (approximately one quarter) call on the Town to prioritize the attraction of new companies to create local jobs or to support certain commercial areas in particular.

Creating local job opportunities by attracting new companies is most important for residents in Ward 2 (42%). In Ward 1, on the other hand, this ranks second at 23%, in a tie with support for existing Oakville companies, and after reducing business cost by providing breaks on electricity costs and taxes (37%). Not surprisingly, Ward 3 residents are most likely to feel the Town should prioritize support for businesses in Downtown, Kerr village and Bronte Village (36%). The call to support global business expansion is higher among men (22%) than women (12%). Attracting new companies to Oakville is more likely to be supported by those ages 35-54 (35%) than by their younger (18%) and older neighbours (24%).

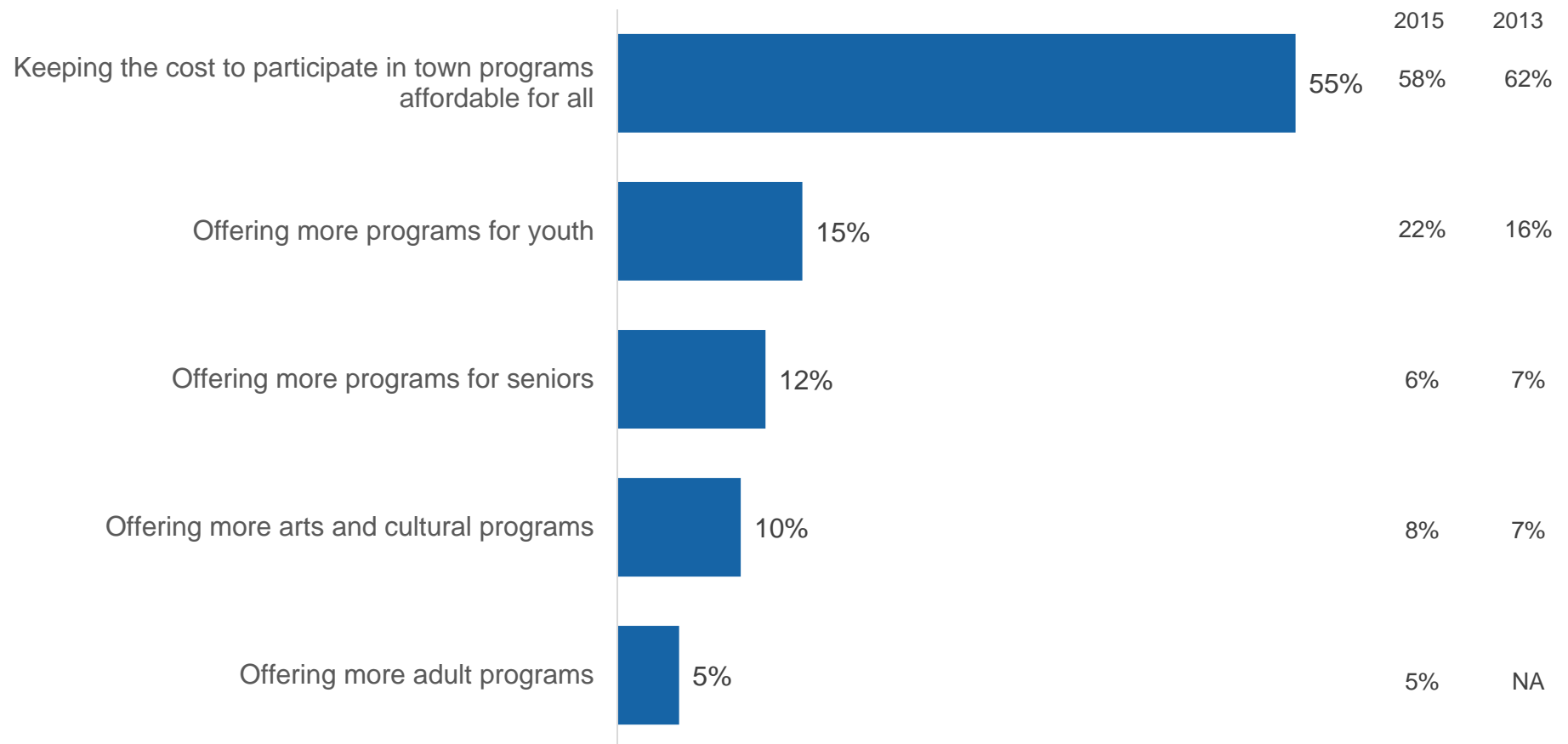


Q42: Thinking about Oakville's economic growth, which one of the following would you like to see the Town make its top priority when allocating budget funds in this area? (N=406)

Oakville's Recreation and Cultural Programs: Top Priority

Offering more recreational and cultural programs for specific segments of the population (youth, seniors, adults, those interested attending arts and cultural programs) are less often seen as preferred budget allocations in this area; rather, ensuring affordability of Town programs for all is chosen as top priority more often than expanding programs.

Affordability is more likely to be ranked first by women (60%) than by men (49%). Men, on the other hand, place higher priority on programs for adults (8% vs 3% among women.) Residents of Ward 1 also very clearly favour affordability over any other option (80%); arts and cultural programs are only important to 1% of residents in this area. More arts and cultural programs are also not valued as highly in Ward 2 (4%), where more adult programs are endorsed by a relatively high number (12%). Seniors programs are not only more popular among its core audience (those 55+; 17%) but also in Wards 4 and 5 (16% each). Cultural programs rank second in Ward 6, while seniors programs are significantly less important here (4%).



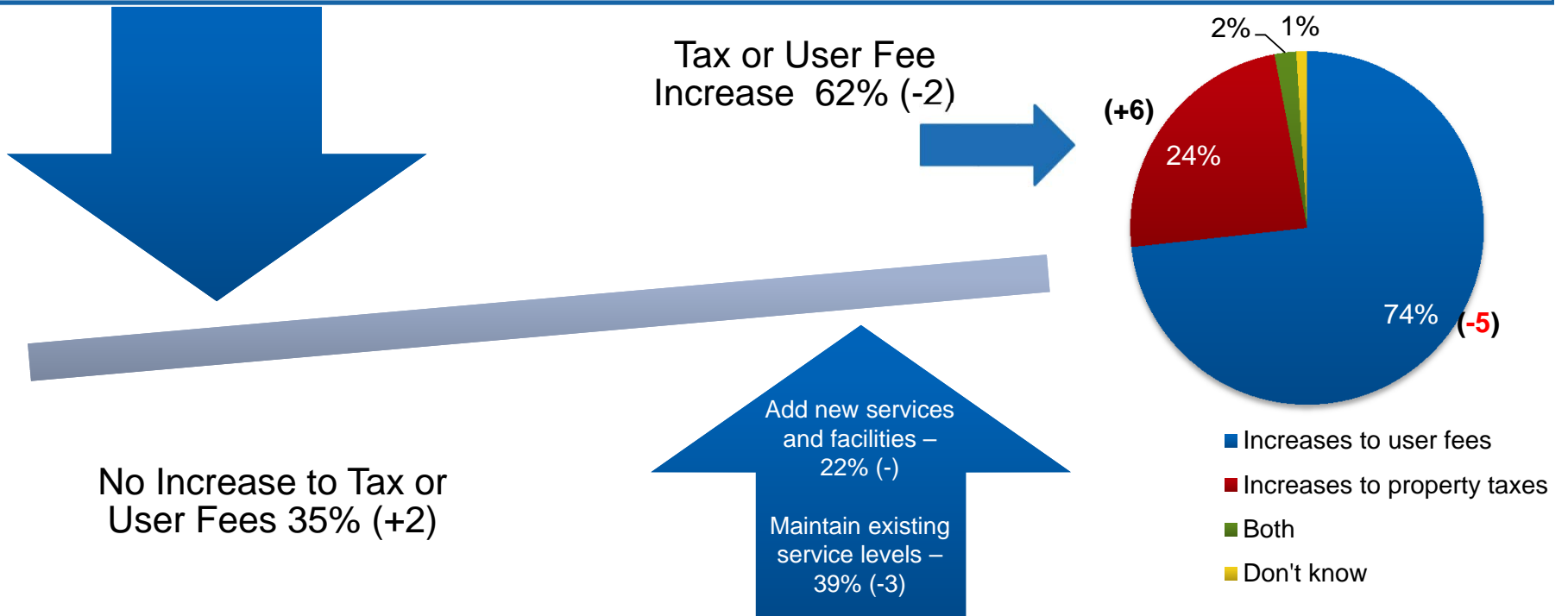
Q43: Thinking about the Town of Oakville's recreation and cultural programs, which one of the following would you most prefer the Town make its top priority when allocating budget funds in this area? (N=406)

Preference: Tax or User Fee Increase to Maintain/Increase Service Levels

While a third of residents do not want any tax or user fee increases, many prefer to add new services (22%) or to at least maintain existing service levels; these latter two options are understood to mean that taxes and/or fees would have to go up. Increases in user fees outnumber increases in property taxes by 3:1 as preferred means to accomplish this.

A tax increase is more popular in Ward 5 (70%), while it is least popular among residents of Ward 3 (53%) and Ward 6 (56%). Maintenance of current levels is more likely to be chosen by men (44%) than women (35%), as well as among those in the oldest cohort (44%, compared to 36% among those between the ages of 35 and 54.)

User fees are more strongly endorsed by men (79% vs 68% among women) as well as among those in the 35-54 age category (78% vs 68% among older residents.)



Q65: Which of the following comes closest to your view? (N=805) Q66: And if [adding services and facilities / maintaining service levels] meant an increased cost to provide those services, which would you prefer? (N=500)

Preference: Tax or User Fee Increase to Maintain/Increase Service Levels

Note: Ward base sizes are between 106 and 222, with associated margins of error between +/-9.5% and +/-6.6% , 19 times out of 20.

This means that sub-group differences (between wards) are often only statistically significant if greater than 10%.

Base sizes for the “preference” question are based on a subset of the sample and are even smaller, with larger associated margins of error.

	Total	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6
Total Tax Increase	62%	68%	59%	53%	63%	70%	56%
The Town of Oakville should add new services and facilities	22%	22%	29%	20%	17%	31%	20%
The Town of Oakville should maintain existing service levels	39%	46%	30%	34%	46%	40%	36%
The Town of Oakville should not increase taxes or user fees	35%	30%	38%	41%	33%	28%	42%
Don't know	2%	1%	2%	4%	3%	2%	<1%

	Total	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6
Increases to user fees	74%	65%	71%	82%	78%	67%	75%
Increases to property taxes	24%	33%	28%	17%	19%	30%	18%
Both	2%	2%	1%	<1%	2%	3%	4%
Don't know	<1%	<1%	<1%	1%	<1%	<1%	2%

Q65: Which of the following comes closest to your view? (N=805) Q66: And if [adding services and facilities / maintaining service levels] meant an increased cost to provide those services, which would you prefer? (N=500)

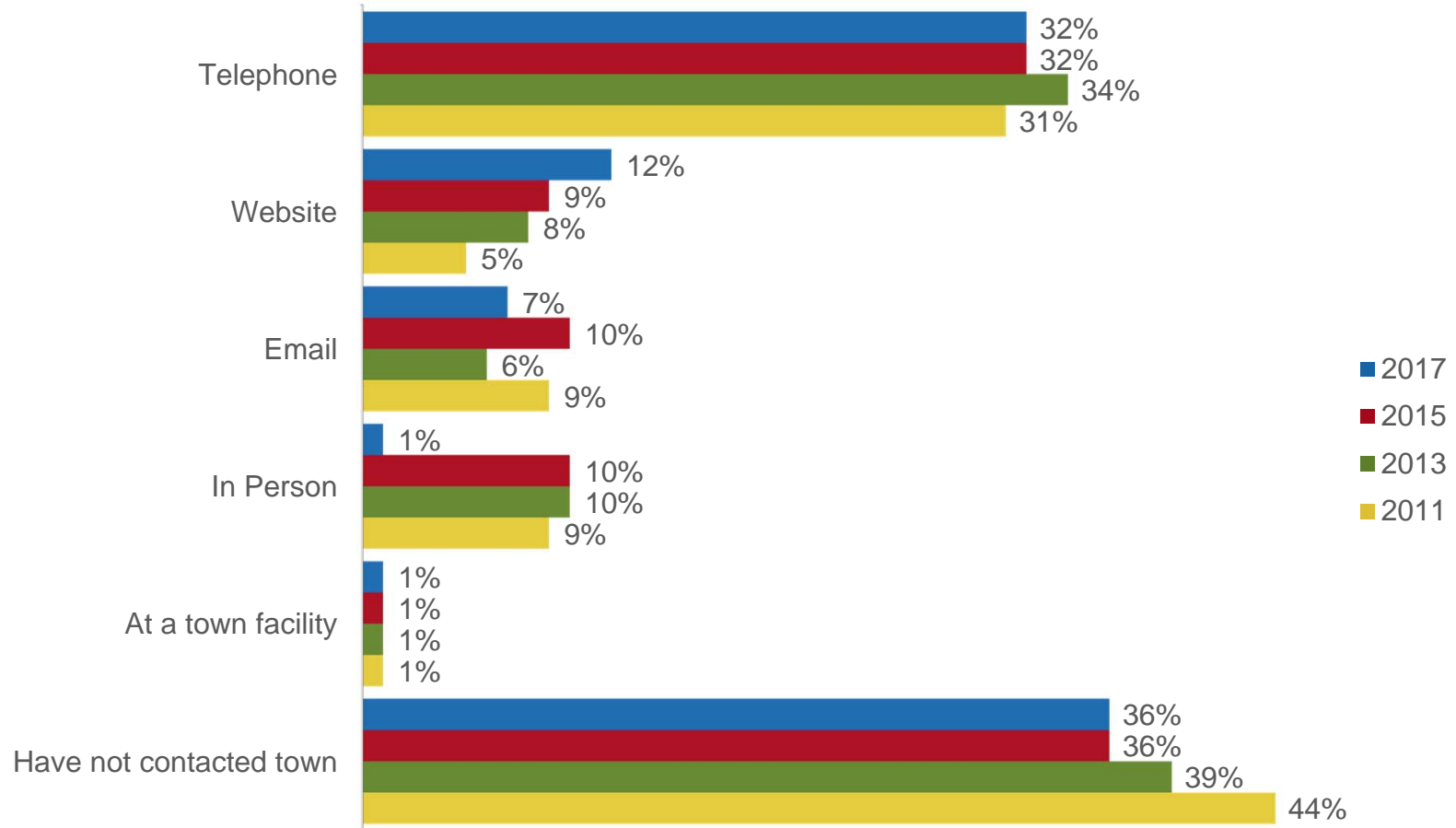
Contact with the Town

POLLARA 
STRATEGIC INSIGHTS

Frequency of and Methods for Town Contact

While just over a third of residents have not contacted the Town in the past two years, those who have, continue to do so primarily by phone. The website has continued its growth in popularity, more than doubling as means of contact since 2011.

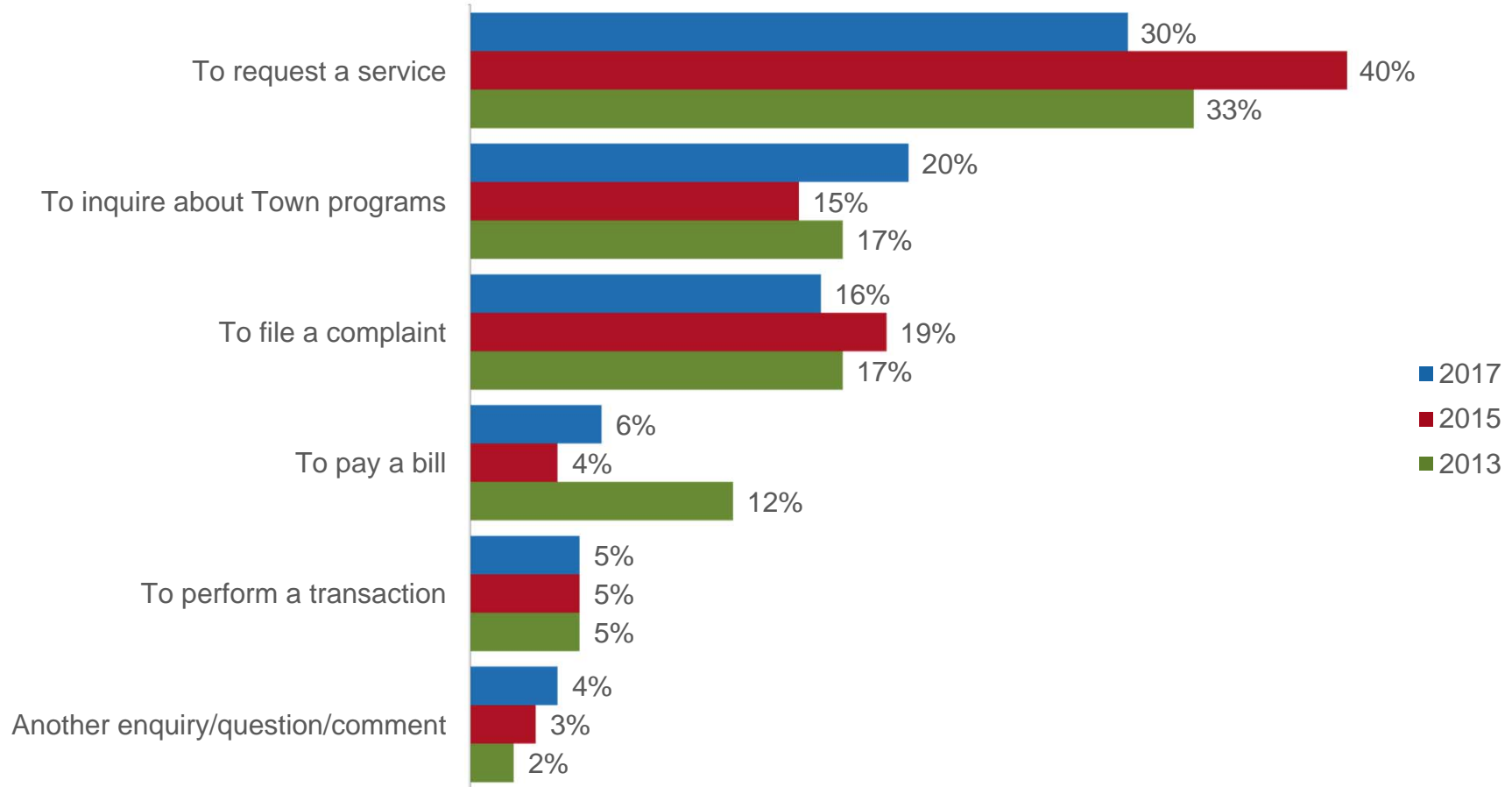
Women are more likely to call (35% vs 28%), as well as to go online (14% vs 9%).



Q67. In the past two years, have you contacted the Town of Oakville for any reason? If so, how did you first contact the Town? Was it by... (N=805)

Reasons for Contacting the Town

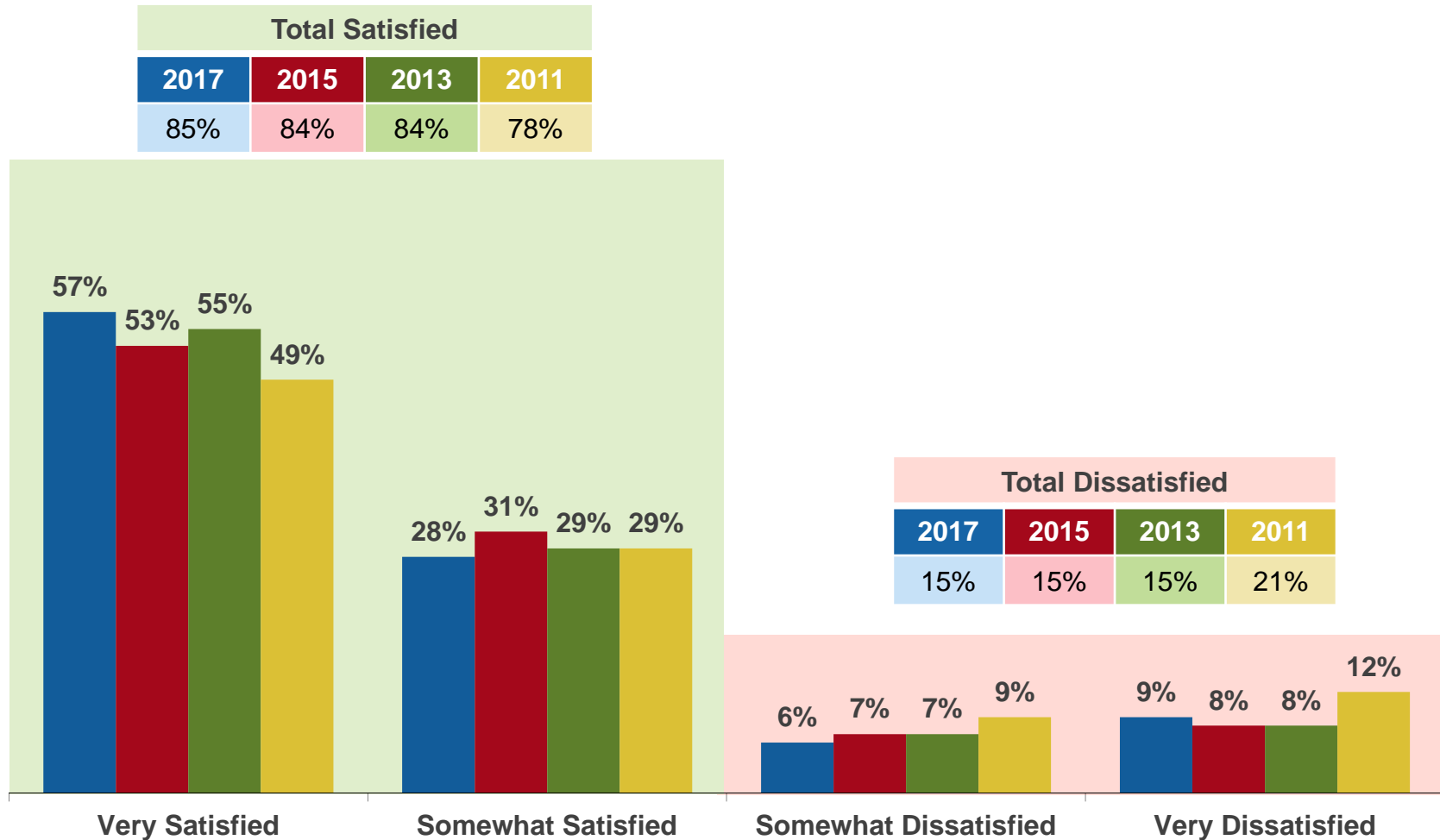
Requesting a service continues to be the top reason for contact, but this is down significantly (by ten points) from 2015. Inquiries about programs on the other hand are up significantly (by five points).



Q68. What was the primary reason you contacted the Town? Was it...(Base: those who have contacted the Town; N=532).

Satisfaction with Service

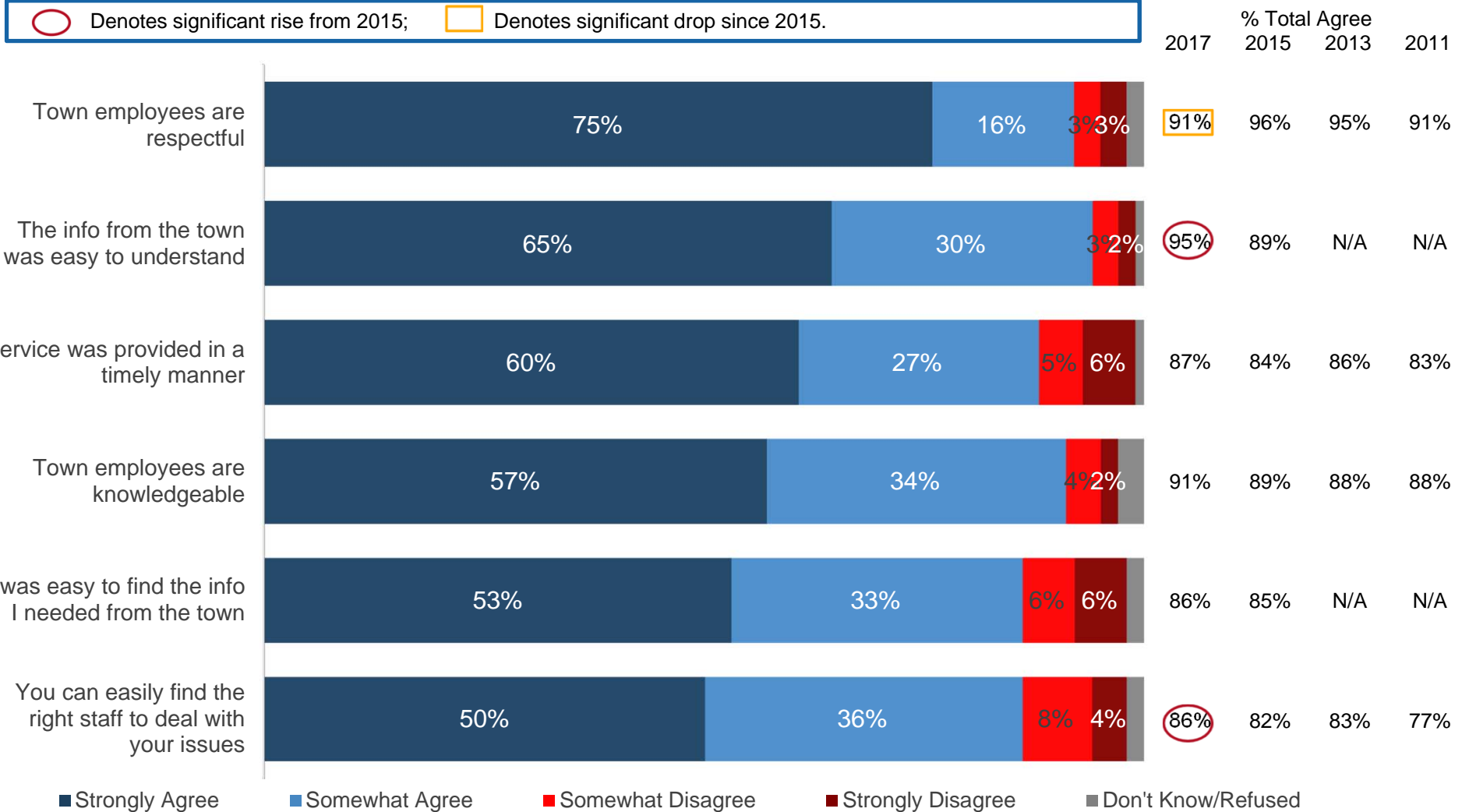
As was the case in the past two waves of the survey, the clear majority of residents say that they were satisfied with their most recent contact experience with the Town of Oakville. This was universal across Wards and demographics.



Q69. And thinking about the most recent contact you had with the Town of Oakville, overall, were you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with the service that you received? (N=532; among those who indicated that they had contacted the Town in the past two years)

Recent Contact Service Evaluations

Residents are clearly pleased with the service they received on their most recent contact. Town employees are virtually always seen as respectful and knowledgeable, while the information received was easy to understand and find. While scores remain high, there has been a decline in the respectful nature of employees since 2015.



Q70-75. And still thinking about the most recent contact you had with the Town of Oakville, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...? What about...? (N=532; among those who have contacted Town in past 2 years).

Key Driver Analysis

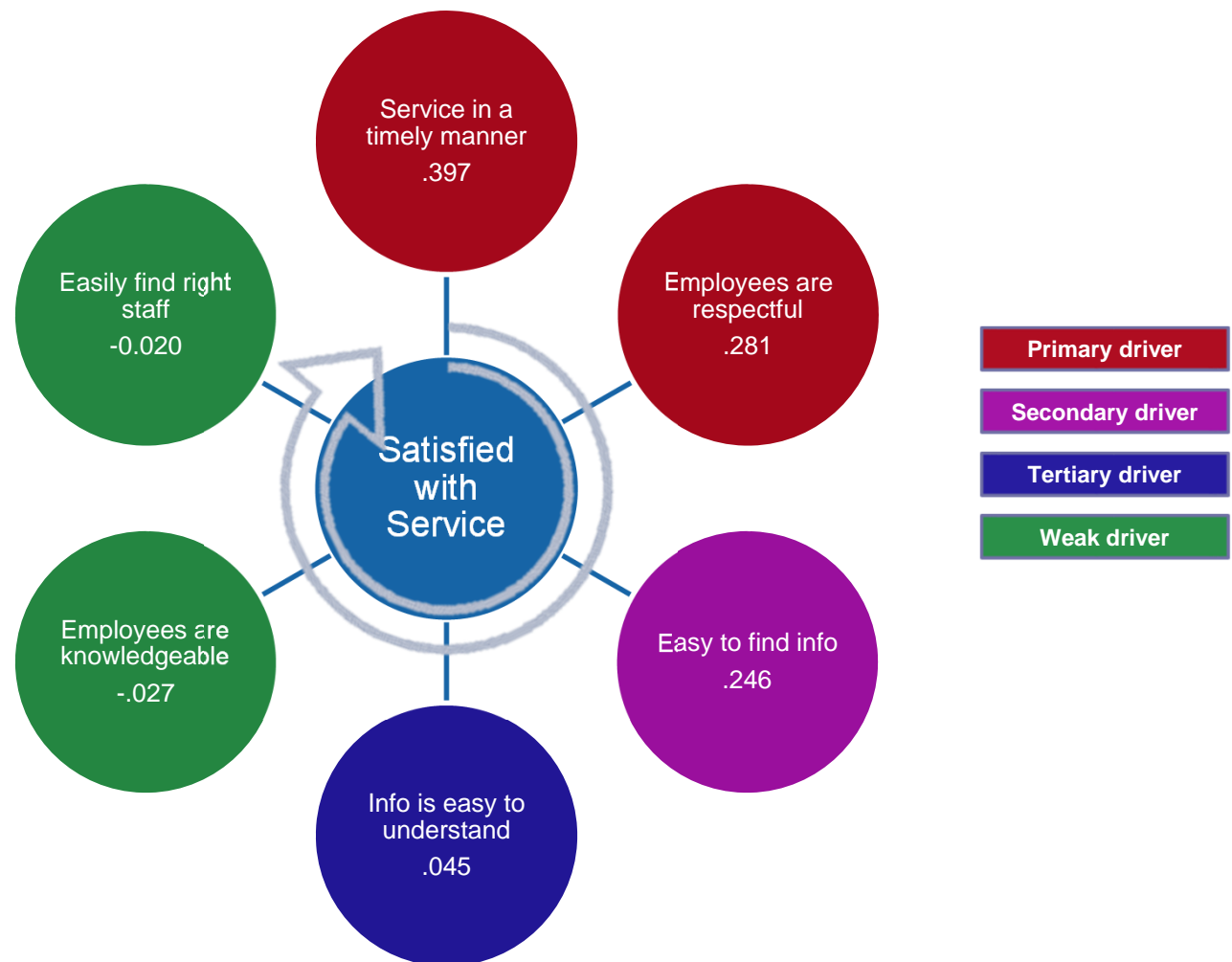
- It often happens that all attributes are deemed to be important by respondents, some are very closely related to one another and still others while critically important, are "price of entry" offerings. To help us cut through the confusion, we conduct a key driver analysis.
- A key driver is a useful technique to help us understand what influences or "drives" satisfaction of those who have interacted with the Town by examining the statistical ones.
- A key driver analysis is in fact a multivariate statistical technique, in this case a linear regression. It measures the impact of independent variables (employees being knowledgeable, respectful, info was easy to understand, etc.) on the dependent variable (satisfaction with service experience). The regression analysis inputs each of the independent variables into a model to examine the impact each has on the dependent measure.
- When we look at each of the independent variables together as a group then, we are able to understand the overall impact they have on the dependent variable. This gives us the strength of the model (the R^2 value) or the amount of change (variance) that can be explained in the dependent variable. To put it simply, the independent variables, explain about 53% of what it means to be satisfied with the service experience.
- The impact of each independent variable is measured by a beta score. The higher the value of the beta score, the stronger the influence, or impact, it has on the dependent variable.
- These are shown moving clockwise from the top.

Key Driver Analysis – Recent Service Satisfaction

Satisfaction with recent service is heavily driven by service being received “in a timely manner”, and by “respectful employees.” Performance and satisfaction with this aspect is key to improving and maintaining overall service satisfaction.

Being able to “easily find the information” is a secondary driver of satisfaction. As such, it is important to maintain current levels of satisfaction with this metric.

While employees being “knowledgeable” and ability to “find right staff” is a weak driver, it actually has an inverse relationship or is seen as a “price of entry.” Here, a high score will not necessarily increase satisfaction, but a low score will detract from satisfaction.

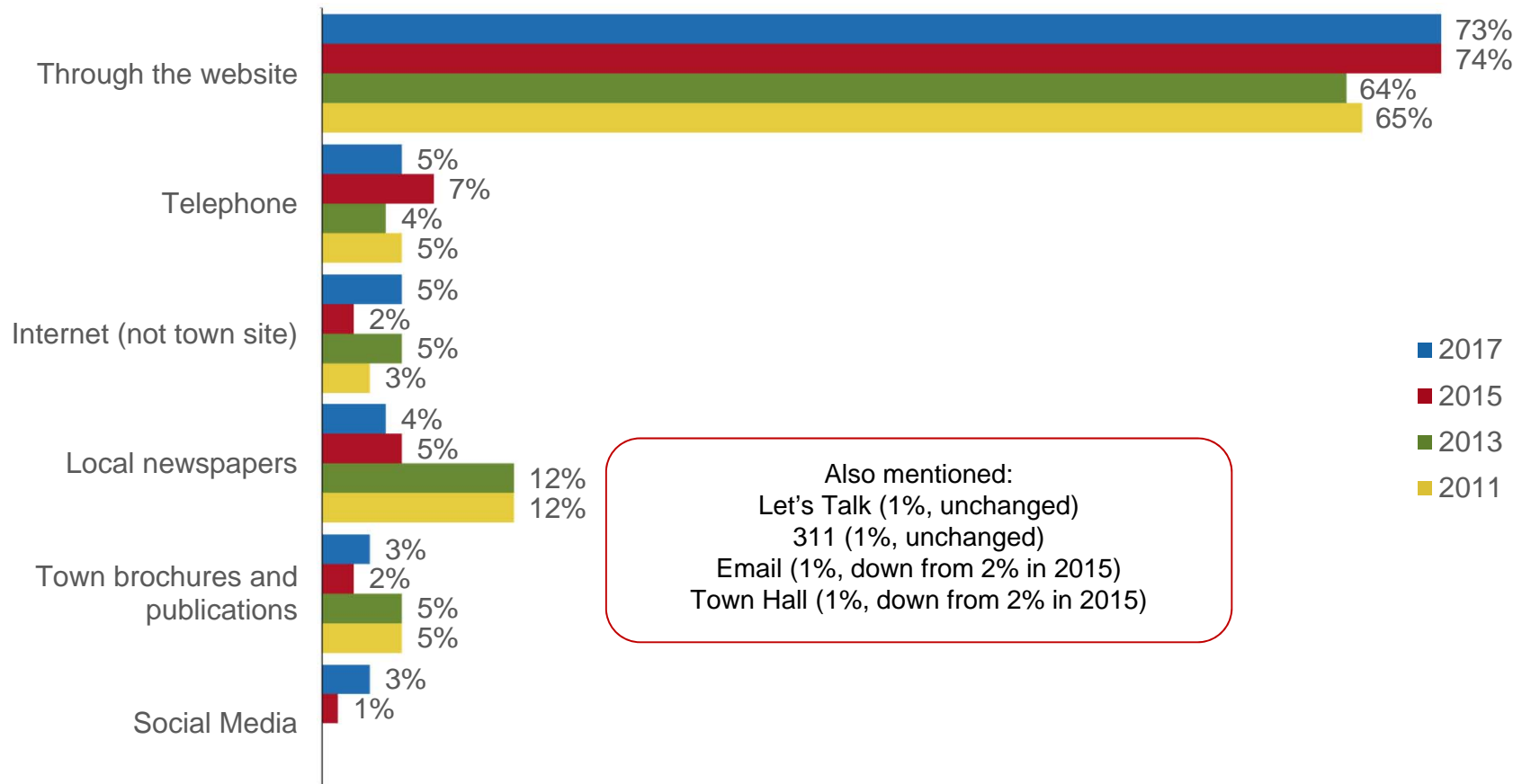


R² - .532

Finding Town Information

A majority of residents (three quarters) continue to rely mostly on the Town website for information about Oakville. A small number of residents turn to other sources as their primary source for information (5% or less for each).

Those over 55 are least likely to use the Town's website to get their information about Oakville (55%), while usage jumps to over four-fifths when looking at 18-34 year olds (82%) and 35-44 year olds (88%). Residents aged 55+ are also the most likely group to use the phone (11%). Website use also varies by income, with just over half (56%) of those with HH incomes of less than \$30K/year using it primarily. This rises to two thirds (66%) among those in the \$30K-\$70K bracket and eight in ten among those earning between more than \$70K annually. Phone, town brochures and local papers are used more than average by the lower income groups.



Q76. How would you most often find information about the Town of Oakville? (N=805)

Around Town

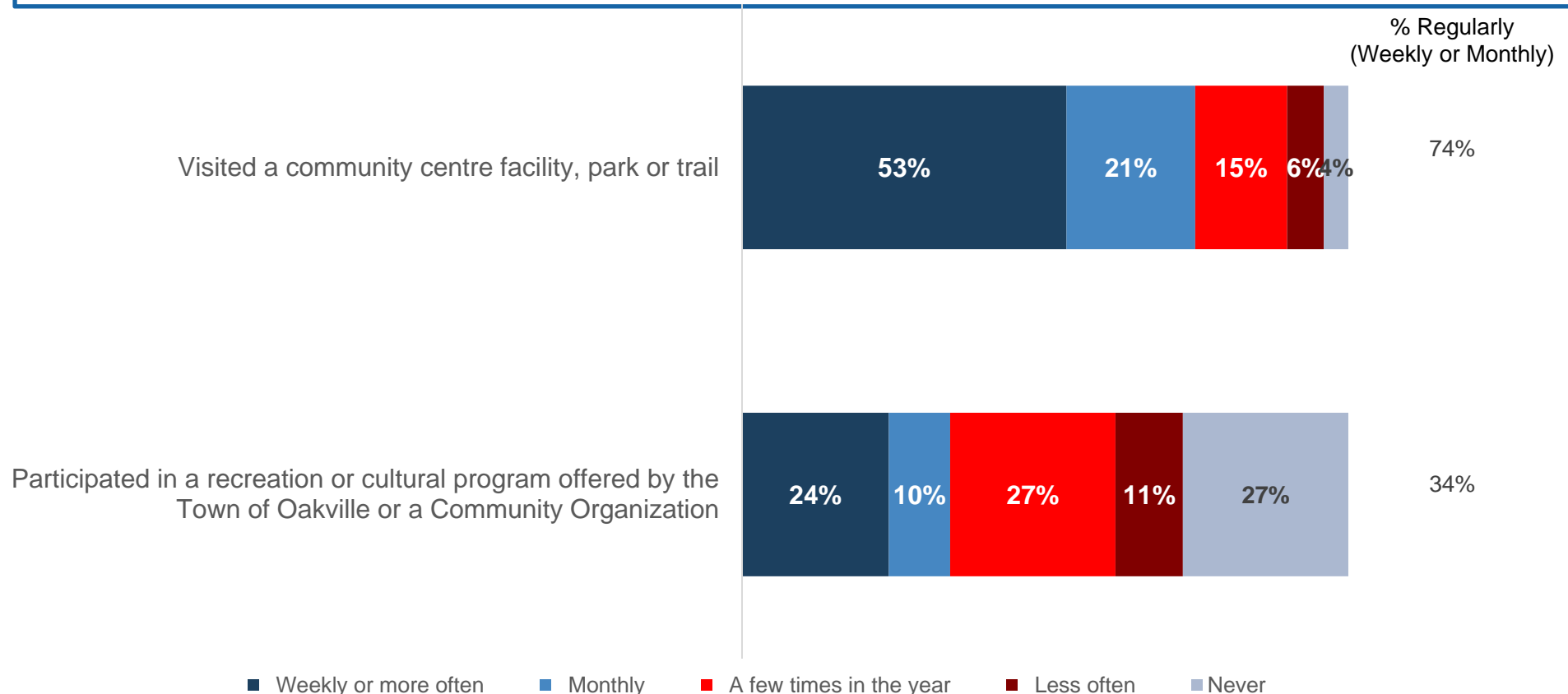
POLLARA 
STRATEGIC INSIGHTS

Activities in Past 12 Months

Three quarters of residents say they visited a community centre, park or trail at least monthly in the past year, with half visiting weekly or more often. Participation in Town programs weekly or more is done by a quarter, with one in ten doing so monthly and another quarter saying they did so a few times in the past year.

Visitation of a Town facility, park or trail is highest among those 35-54 (82% visiting at least monthly) and lowest among older residents (63%). Ward 4 and 6 residents are the most likely to be regulars (80% respectively) while those in Wards 2 (59%) and 1 (60%) do not use them as much. Regular program participation is highest among Ward 3 residents and lower in Wards 2 (3%), 6 (27%) and 4 (31%). Those between the ages of 35 and 54 are the programs' core audience (39% using them regularly) and those 55+ are least likely to participate at least monthly (28%). Income is also an indicator for program participation, rising from 15% among the lowest income families to 60% among those in the \$110-\$150K/year bracket, dropping off among those with the highest incomes (38%).

Program participation also appears related to overall satisfaction with the Town: satisfied residents (37%) are more likely than those who are not satisfied (22%) to have participated at least monthly in the past year.

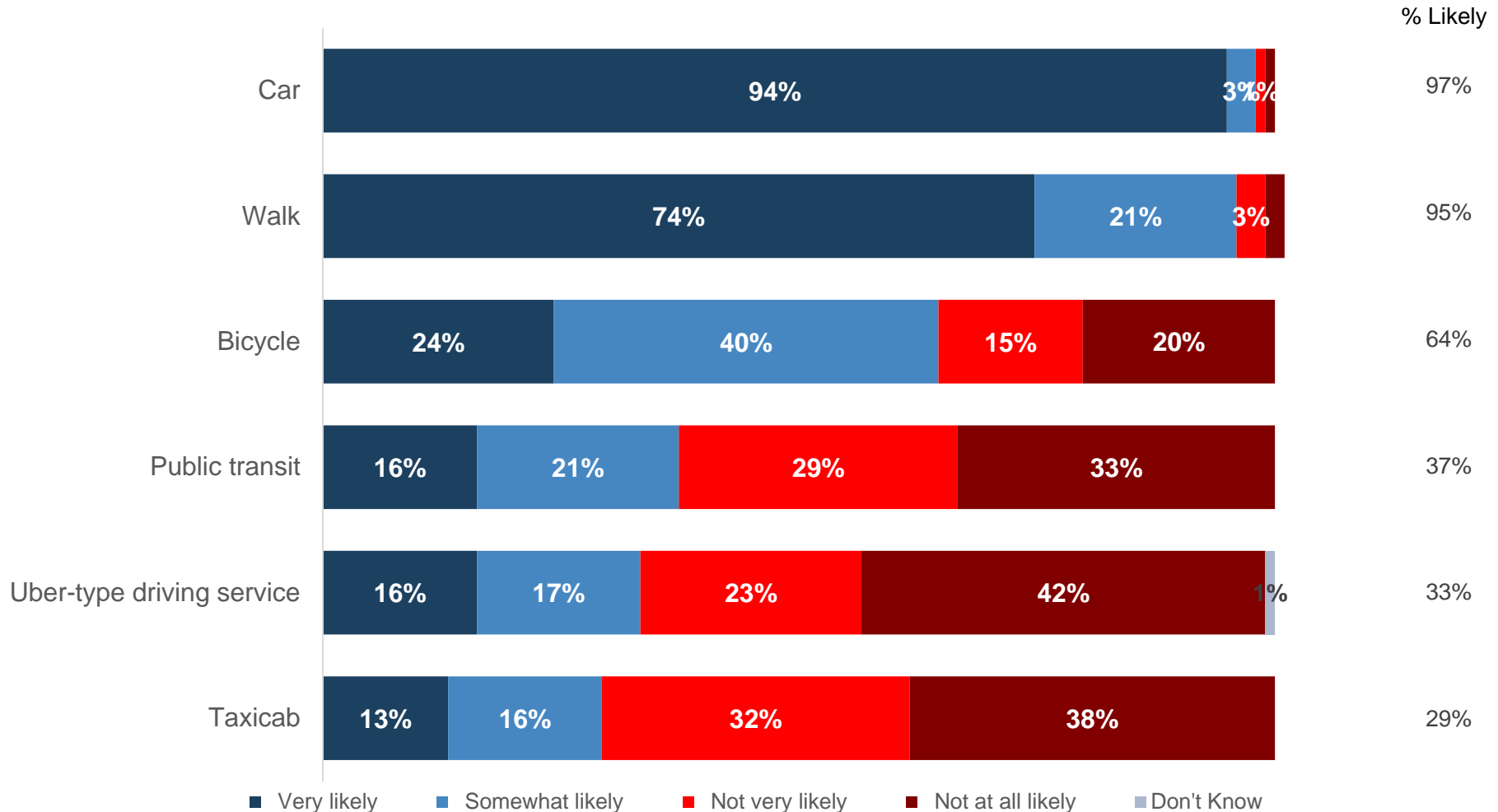


Q44-45: Thinking of the following activities, would you say in the past 12 months you have done each weekly or more often, monthly, a few times in the year, less often or never? (N=406 for each).

Likelihood to Use Different Types of Transportation

Virtually all residents predict they will use a car to get around town in the next year. Walking is the next most popular mode of local transportation, followed by bicycling. Public transit will likely be used by almost four in ten residents.

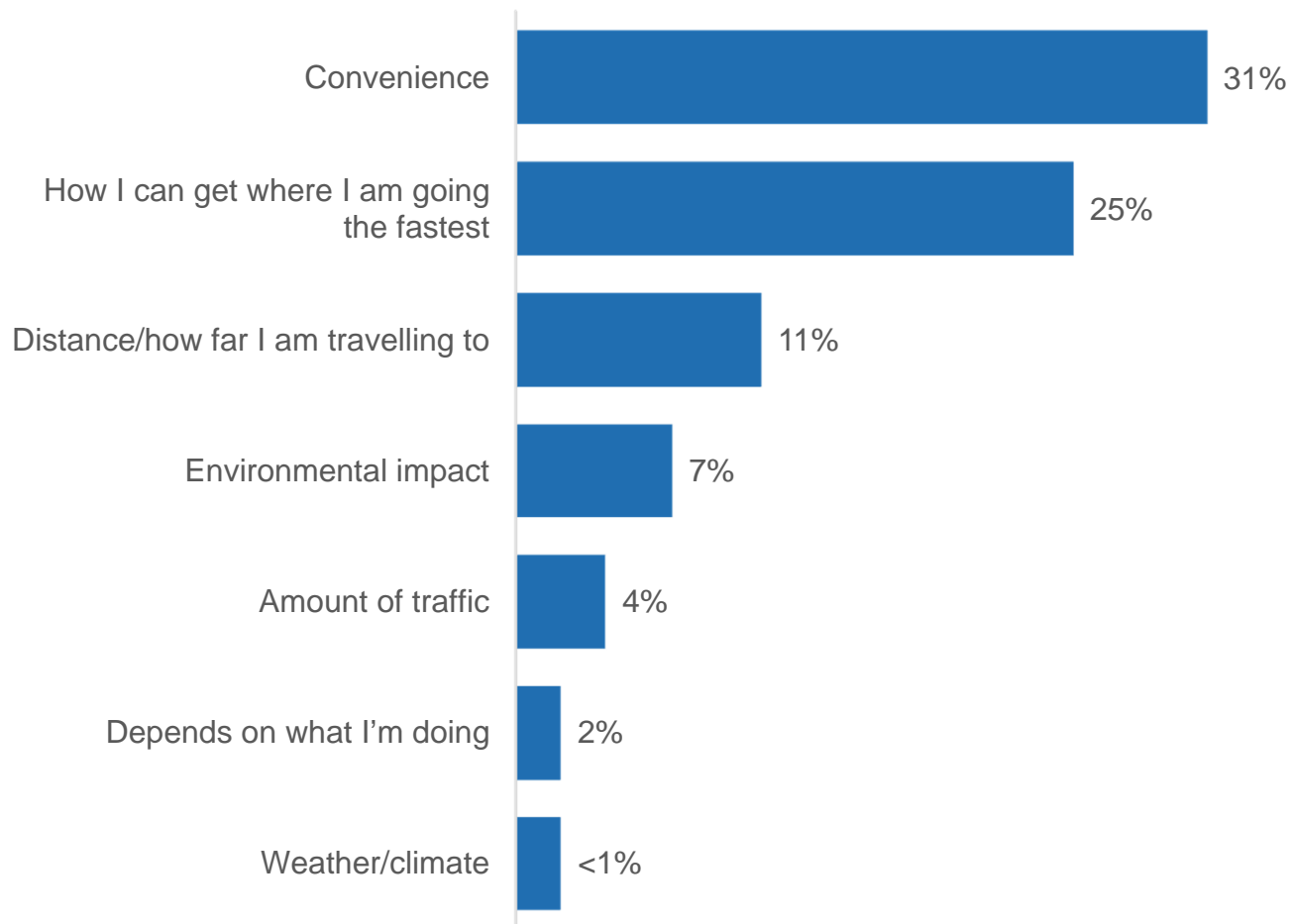
Anticipated public transit use is highest among residents of Ward 2 (47%) and lowest in Ward 4 (32%). Bicycling is more popular among men (69%) than women (60%) while car usage and walking are universally popular.



Q46-51: In the next year, are you very likely, somewhat likely, not very likely to not at all likely to use each of the following types of transportation to get around Oakville? (N=805 for each).

Most Important Factor for Transportation

Convenience trumps all other factors when deciding on transportation methods, although speed of getting from point A to B is also quite important. This is true across Wards and demographics.



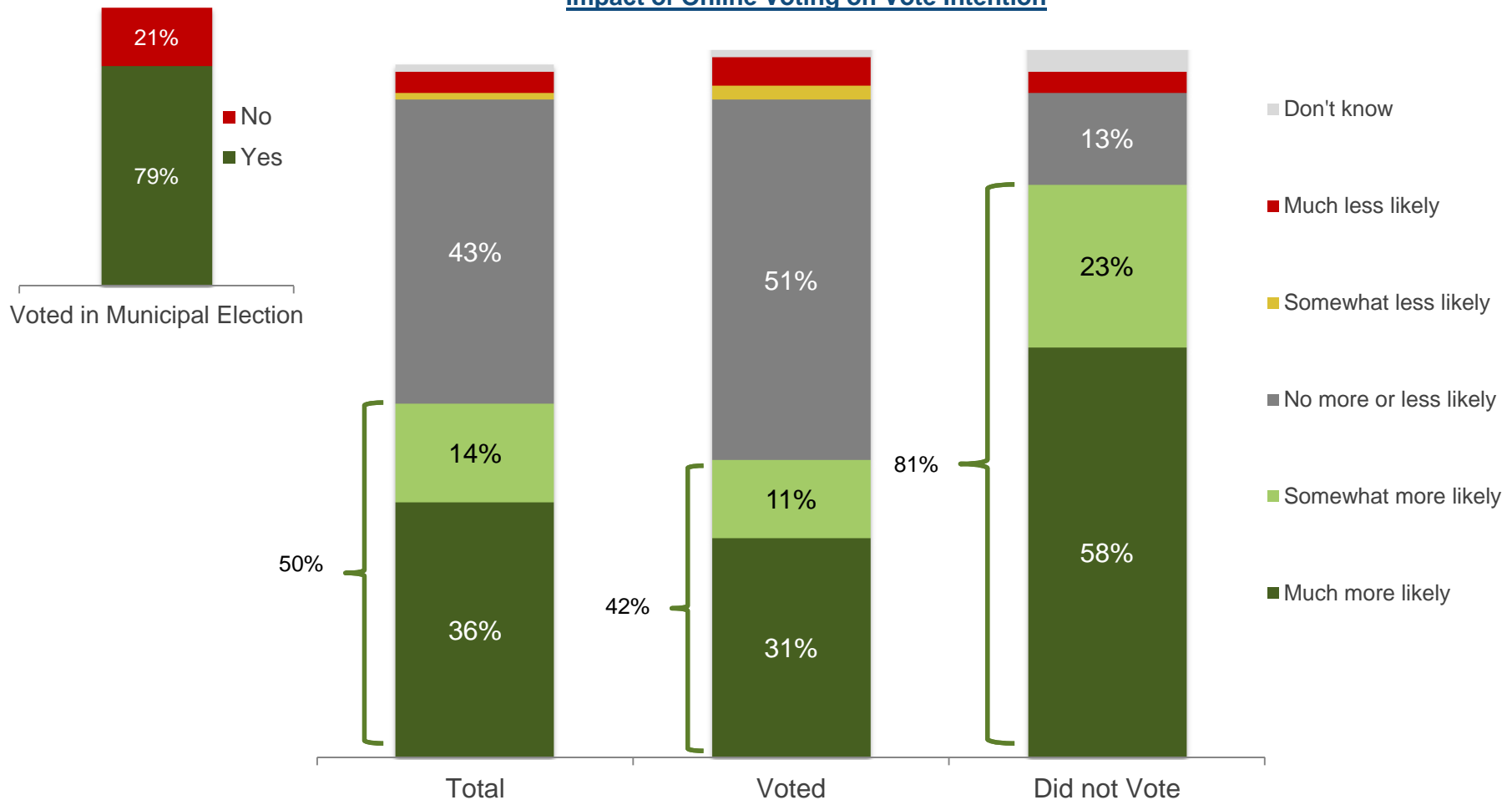
Q52: What is the most important factor to you, when deciding what method of transportation you will use to get around Oakville?
(N=805)

Voter Turnout and Support for Online Voting

Eight in ten respondents say they voted in the past municipal election. Half of residents say they would be more likely to vote if online voting were offered in the next election, while it wouldn't change intentions for most others. It would have strongest effect on those who did not vote in the last election.

Residents of Wards 6 (87%) and 3 (84%) are the most likely to say they voted, while those in Wards 2 (66%) and 1 (69%) are the least inclined. Older residents (55+; 89%) are more likely to have been voters than younger residents (75%).

Impact of Online Voting on Vote Intention



Q77: Did you vote in the most recent municipal election in October 2014? Q78: The Town is considering offering internet or online voting as an additional way to vote for municipal elections. Would having the option to cast your ballot online for municipal elections make you... N=805

POLLARA 
STRATEGIC INSIGHTS

**1255 Bay Street, Suite 900
Toronto, Canada M5R 2A9**

Tel: 416.921.0090 | Fax: 416.921.3903

www.pollara.com