

Staff Report

Chief Administrator's Office

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REPORT TO: Special Council

DATE OF MEETING: May 9, 2022

SUBMITTED BY: Kathryn Dever, Director, Strategy and Corporate Performance
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PREPARED BY: Kathryn Dever, Director, Strategy and Corporate Performance
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WARD(S) INVOLVED: All

DATE OF REPORT: May 3, 2022

REPORT NO.: CAO-2022-198

SUBJECT: Results of Environics 2022 Survey of Kitchener Residents

RECOMMENDATION:

For discussion

REPORT HIGHLIGHTS:

- The purpose of this report is to communicate the results of the Environics 2022 Survey of Kitchener residents.
- At the Council strategy session **Council's feedback on what is important to learn more about from citizens through the next engagement phases** will be sought.
- Community engagement included posting this report to the City's website with the agenda in advance of the council meeting. The survey results will be used to inform public engagement to identify community priorities and cast a new community vision through a meaningful and inclusive public engagement process.
- This report supports the creation of a new strategic plan that builds on the success of the existing strategic and goes further with a new 20-year vision for the City of Kitchener
- There are no financial implications associated with this staff report.

BACKGROUND:

The City's Strategic Plan sets priorities and a plan for action that guides progress over the four-year term of Council towards our long-term community vision of building an innovative, caring and vibrant Kitchener. The current 2019-2022 Strategic Plan has driven progress toward tangible achievements and results, while providing context for the annual Business

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Plan, and decision-making on capital and operating budget investments. Importantly, the Strategic Plan represents a commitment to the public to move forward on those things that are most important to them. The next term of Council beginning in 2023 represents an opportunity to set a new agenda for the next four years that builds on the progress made, while planning for the future to take advantage of new opportunities to serve the community better, and respond to any emerging issues or shifts in citizen priorities.

A new aspect of the planning process beyond the four-year planning horizon, will be engaging with the community to cast a new long-term vision to refresh the current vision which was established in 2000. The updated vision will go beyond an aspirational statement, and instead include measurable targets for the City to plan for over multiple strategic plans, in an effort to wholistically tackle the complex issues our community faces. The community engagement for this visioning process will be a key element that Compass Kitchener and staff will collaborate on in the coming months. Community engagement has always been an important part of the strategic planning process, and uniquely entrenched in the Compass Kitchener advisory committee mandate.

REPORT:

Compass Kitchener Responsibilities

The Compass Kitchener citizen advisory committee has a significant role with respect to public engagement processes tied to the strategic plan. In particular, the committee is responsible for:

- Designing and implementing public engagement processes in collaboration with staff to validate the community's vision and major strategic priorities and recommending community priorities before each municipal election.
- Reporting to Council on community priorities to assist in the establishment of, and updating of, Council's four-year Strategic Plan and annual Business Plans.
- Developing evaluation criteria in collaboration with staff reflective of the community's priorities and monitoring the City's performance against goals included in the Strategic Plan for the City of Kitchener.
- Reporting on performance to Council and the Community on an annual basis.
- Ensuring communication and collaboration among Advisory Committees of Council by convening two yearly meetings, one for Chairs and Vice Chairs and the second for the full membership of all Advisory Committees.
- Developing a yearly workplan and submitting it to Council for feedback.

Environics Survey Methodology

Environics Research was retained to: design a survey on municipal issues and priorities with the input of staff, Compass Kitchener and REFOCUS consulting; execute the survey

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with a statistically representative sample of Kitchener residents; and to report on the results. A telephone survey of 1,006 Kitchener residents aged 18 and older, was completed between March 18th and April 4th, 2022. The survey has a margin of error of plus or minus 3.1%, nineteen times out of twenty.

Residents in each of Kitchener's 10 wards were surveyed, as well as both landline and cellphone users. The sample for this survey matches the statistics Canada profile for the City of Kitchener on key demographic and lifestyle variables and the results can be considered representative of the general population. The results of the survey provide a current pulse on the community as well as important insights for the development of a strategic plan that will align with the views, opinions and concerns of residents.

Recognizing the importance to the City of better representing the full diversity of the community in gathering public opinion, the 2022 survey was designed with a different approach to data collection and lens on data analysis than previous surveys. Improvements made over previous surveys include more equity-focused questions, and expanded demographic questions to help understand opinions across categories including race and gender identity, which were not asked in previous surveys.

Highlights of Survey Results

- Satisfaction with the City of Kitchener government is high, and results have remained stable since the last community survey in 2018. Just under four in five residents are satisfied with their municipal government, and six in ten say the City is on the right track.
- Residents' perceptions of value for tax have declined since 2018, with 60% saying they receive good value (compared to 68% in 2018). 26% of residents favour a tax increase to improve services, and one-third would prefer service cuts over tax increases.
- When residents are asked unaided to name the single most important issue facing the City, 33% of residents reference housing affordability. This priority is also reflected when asked for the one thing the City can do to make Kitchener a better place - the most common response is to improve housing affordability, tied with better roads and transportation.
- To address housing and homelessness, over one-third of Kitchener residents think the City should focus on advocating with other levels of government to fund programs that will end homelessness, while a slightly smaller proportion say the City should work with other levels of government and organizations to secure funding for affordable housing options.
- On the topic of Sustainability, 59% of Kitchener residents agree that it is important to use more of the City's budget to address climate change.
- A majority of Kitchener residents want to see the City balance supports for existing businesses and the creation of new jobs.

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Next Steps:

Insights from the public survey and Compass Kitchener will be used to inform the next phase of engagement around the creation of a 20 year vision, and identify the community priorities that Compass Kitchener will present to council in September. A campaign to encourage resident involvement in a variety of engagement opportunities is planned. Digital and online options will be included, alongside focus groups and interviews with equity deserving groups and individuals. Engagement will shift from a consultative approach in the early stages of the strategic planning process, to a focus on relationship building and deeper opportunities to learn and plan WITH the community. The Strategic Plan engagement will also be informed and supported by the Equity and Antiracism Committee, and staff from the Equity, Antiracism and Indigenous Initiatives team with a strong desire to build and maintain ongoing relationships with equity deserving groups beyond the timeframe of the Strategic Planning cycle.

Key Community Engagement Activities:

- Launch multi-faceted communications campaign (May 2022)
- Launch online engagement Engage Kitchener page (May 2022)
- Pop-up and Event engagement (June 2022 - August 2022)
- Outreach to community groups (June 2022 - December 2022)
- Online public survey (EngageKitchener) on draft Strategic Goals and Actions (May 2023)

Discussion question for Council:

Based on the community survey results, what would you like to learn more about from citizens through the next phase of engagement?

STRATEGIC PLAN ALIGNMENT:

This report supports the development of the 2023-2026 City of Kitchener Strategic Plan.

FINANCIAL IMPLICATIONS:

This report has no impact on the Capital Budget or on the Operating Budget.

COMMUNITY ENGAGEMENT:

INFORM – This report has been posted to the City's website with the agenda in advance of the council/committee meeting.

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CONSULT – The public will be further consulted on the results of the Environics survey through the upcoming engagement phase.

COLLABORATE – Compass Kitchener is collaborating with staff to design and implement a public engagement program to engage residents and other stakeholders on the results of the survey to help identify community priorities and to inform the creation of the 2023-2026 Strategic Plan.

PREVIOUS REPORTS/AUTHORITIES:

- CAO-2022-160 Preparing for the 2023-2026 Strategic Plan
- Council Policy GOV-BOA-077 (Compass Kitchener Terms of Reference)

APPROVED BY: Dan Chapman, CAO

ATTACHMENTS:

- Attachment A - Environics City of Kitchener Public Survey Report
- Attachment B - Environics Public Survey Presentation

CITY OF KITCHENER: PUBLIC SURVEY



A Quantitative Survey of Kitchener Residents
FINAL REPORT | MAY 2nd 2022

ENVIRONICS
RESEARCH

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INTRODUCTION METHODOLOGY AND KEY INSIGHTS

RESEARCH METHODS

In partnership with REFOCUS, the City of Kitchener commissioned Environics Research to conduct a telephone survey with a representative sample of Kitchener residents on municipal issues and City priorities, including Sustainability, Homelessness, Economy, and Arts and Culture. Results are contributing to the 2022 cycle of strategic planning for the City.

The following report is based on results from a telephone survey of Kitchener residents. **A total of N=1,006 residents**, aged 18 and older, completed the telephone survey, which was available from **March 18th to April 4th, 2022**.

Data collection included both landline and cellphone-only households in Kitchener. To ensure representative participation across Kitchener, Environics set quotas for gender, age, and Ward.

Differences across subgroups are shown in this report ONLY where they are statistically significant. Pages which do not have subgroup call-outs indicate that there were no statistically significant differences to make note of.

The final results are weighted to reflect the current demographic composition of Kitchener. The margin of error for a sample of n=1,006 is +/- 3.1 percentage points, nineteen times out of twenty. Where applicable, results from 2022 findings are compared to similar surveys conducted in 2018 and 2013. Results are expressed as percentages unless otherwise noted, and may not add to 100% due to rounding, multiple responses, or insignificant 'DK' category samples.

CAPTURING DIVERSITY IN 2022

The 2022 Public Survey adopted a different approach to data collection and a lens on data analysis than previous surveys. The shift resulted in survey data that captures the diverse composition of Kitchener's population in a way that is rigorous and representative.

In recognition of the City of Kitchener's commitment to better capturing and representing **the full diversity of its communities** through engagement activities, the 2022 Public Survey includes questions and language that invite and capture feedback from Kitchener's diverse communities.

2022 survey results reflect a greater emphasis on and awareness of the diversity present through the use of inclusivity-focused questions that acknowledge the diversity of demographics such as age, region, race and gender identity within the City.

Where evident in the data, statistically significant differences among communities are highlighted in this report.

KEY INSIGHTS

- 1 Top local issues have changed considerably since 2018 in the City of Kitchener.** One third of residents mention affordable housing as a top issue (33%), which is more than three times higher than the result from 2018. Likewise, the top issue of 2018, transportation, has dropped by 22%, where just 4% of Kitchener residents mention transportation as a top issue today. Asks from Kitchener residents regarding how to make the City a better place line up with today's top issue, as citizens want to see more affordable housing to make the City a better place.
- 2 Perceptions of the City remain stable: just under four in five residents are satisfied with their municipal government, and six in ten residents say the City is on the right track.** Ward 2 residents, and those aged 18-34, are more likely to say they are satisfied with the municipal government than other groups.
- 3 Citizens show more hesitancy around tax dollars, with metrics declining in this area.** Perceptions of values for tax have gone down since 2018, with 60% of residents saying they get good value, compared to 68% four years ago. One in four (26%) Kitchener residents would like to increase taxes to improve services, while one in three (33%) would rather see services cut than increase taxes.
- 4 The City of Kitchener has room for improvement in its communications around the use of tax dollars.** Almost half of Kitchener residents say the City does a fair job communicating how tax dollars are spent. Just under a quarter say the City does a poor job. These proportions remain stable from 2018 with little improvement. Notably, Ward 1 residents are more likely to say their municipality does an 'excellent' job.

KEY INSIGHTS

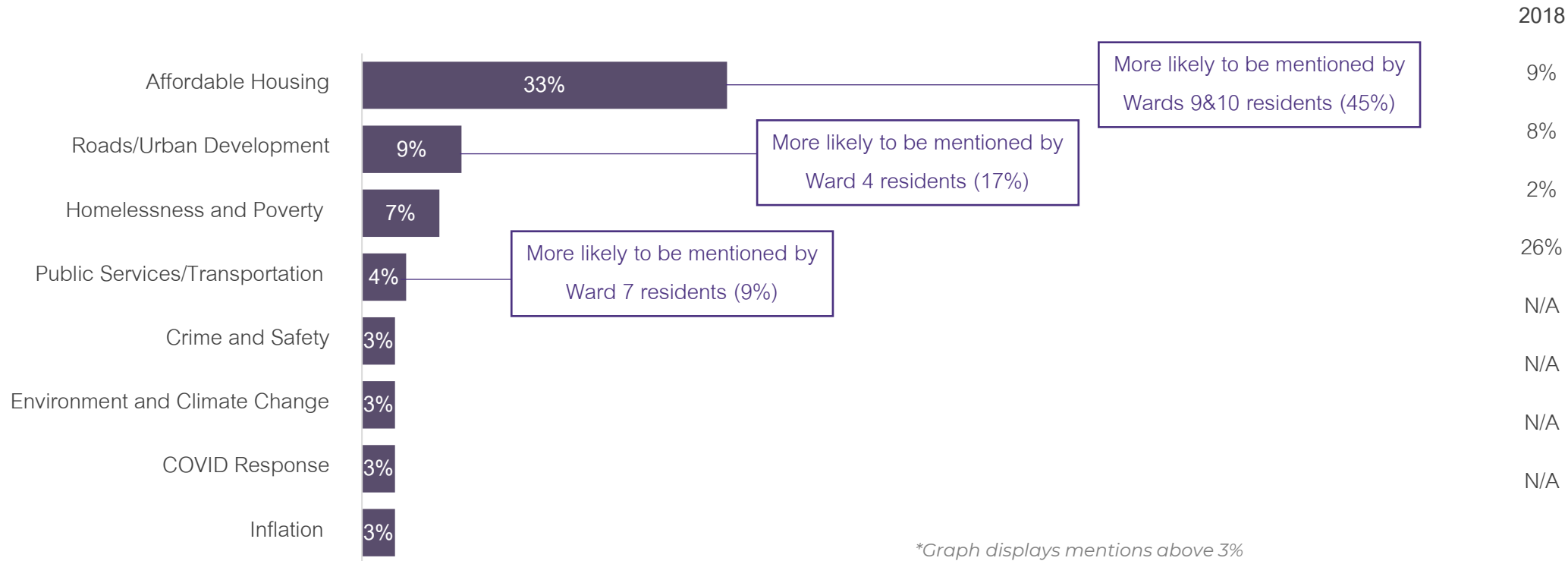
- 5** **On the topic of Sustainability, over half of Kitchener residents agree that it is important to use more of the City’s budget to address climate change (59%).** Views on how the most important sustainability considerations, however, are met with split opinions from residents: just over one quarter say the City should focus on sustainable development, while the same proportion say it should work to protect natural resources and agriculture (27%).
- 6** **A majority of Kitchener residents want to see the City balance supports for existing businesses and the creation of new jobs.**
- 7** **On the topic of Arts and Culture, Kitchener residents want to see a general larger investment in events: from hosting cultural events, making them affordable, and focusing on diversity events.** In terms of programs and services they want to see from the City, Kitchener residents prioritize mental health and well-being, as well as services for vulnerable populations, as ‘very important’ recreation and leisure programs (63% and 59%, respectively).
- 8** **More than half of all residents feel motivated to be involved in future planning and consultation in the City. This result should be considered in context with the pervasive perception that citizen input has had little or no impact on City decision-making.** Just under 70% feel they influence City decisions ‘a small amount’ or ‘not at all’.

CORE METRICS

Core Metrics | Most Important Local Issue

Top local issues have changed considerably since 2018 in the City of Kitchener. One third of residents mention affordable housing as a top issue (33%), compared to 9% in 2018. Likewise, the top issue of 2018, transportation, has dropped by 22%, where just 4% of Kitchener residents mention transportation as a top issue in 2022.

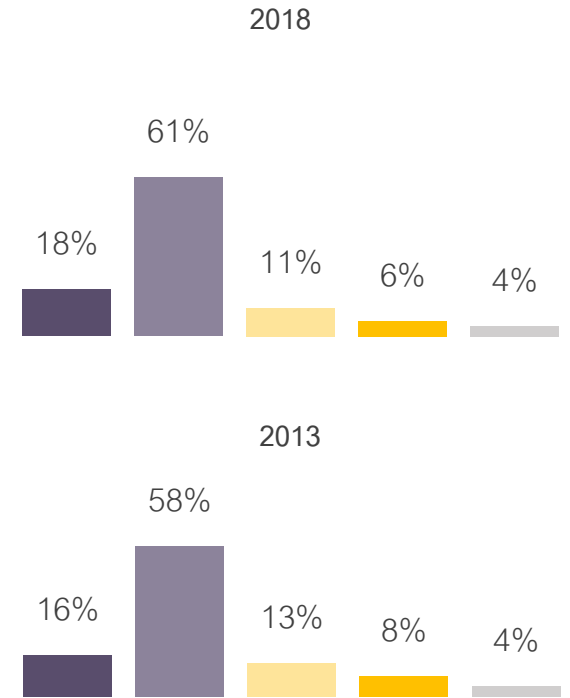
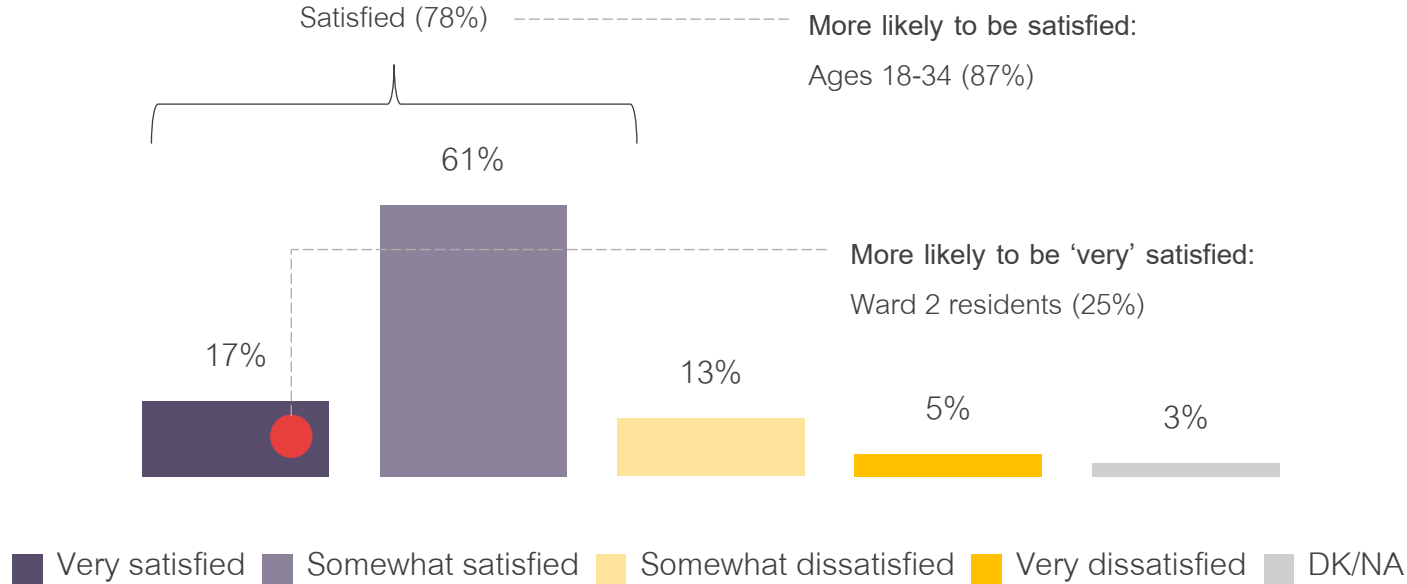
Q1. What, in your opinion, is the single most important local issue facing the City of Kitchener today? (N=1,006)



Core Metrics | Satisfaction with City Government

Satisfaction with the municipal government has stayed relatively stable since 2013, with just under four in five Kitchener residents saying they are very or somewhat satisfied. Those aged 18-34, as well as Ward 2 residents, are most likely to be satisfied with the municipal government.

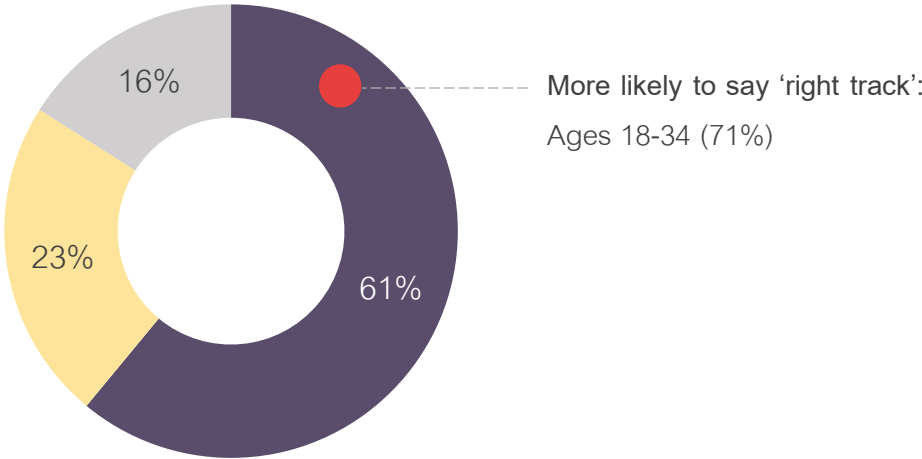
Q2. In general, would you say that you are ... with the municipal government of the City of Kitchener? (N=1,006)



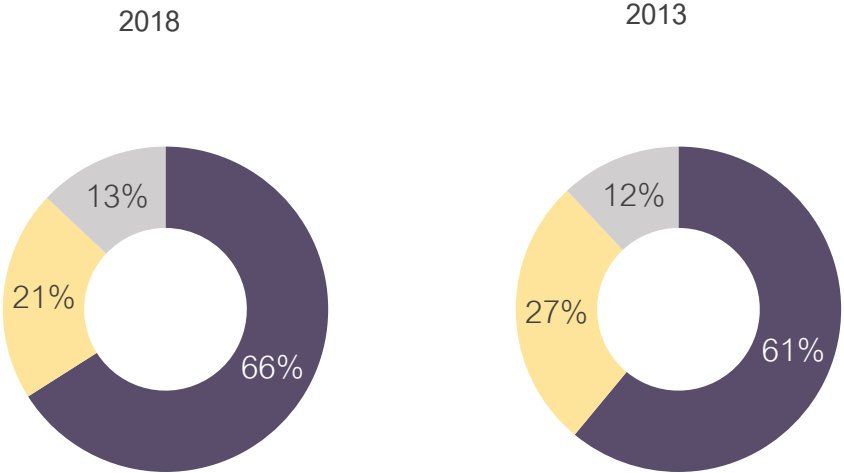
Core Metrics | **Right Track Wrong Track**

Just under two thirds of Kitchener residents say the government is on the right track in addressing issues facing the community. This has dropped slightly since 2018 but is on-par with ratings from 2013. The change from 2018 is statistically significant. Those aged 18-34 are again more likely to say Kitchener is on the right track.

Q3. Looking forward, would you say that the Kitchener government is on the right track, or the wrong track in addressing the issues facing your community? (N=1,006)



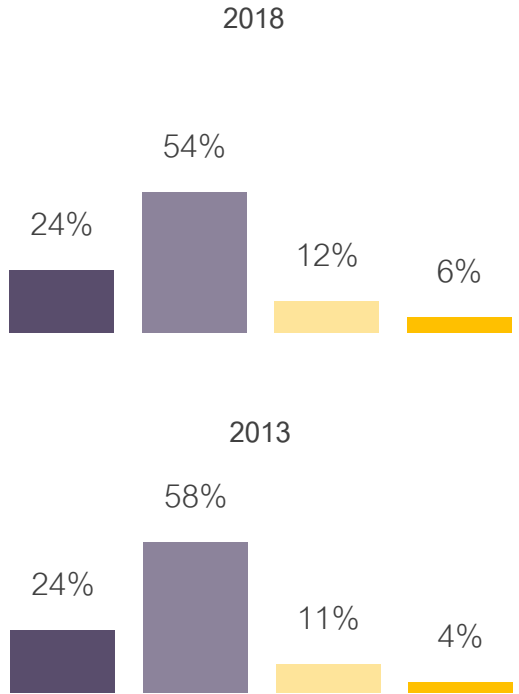
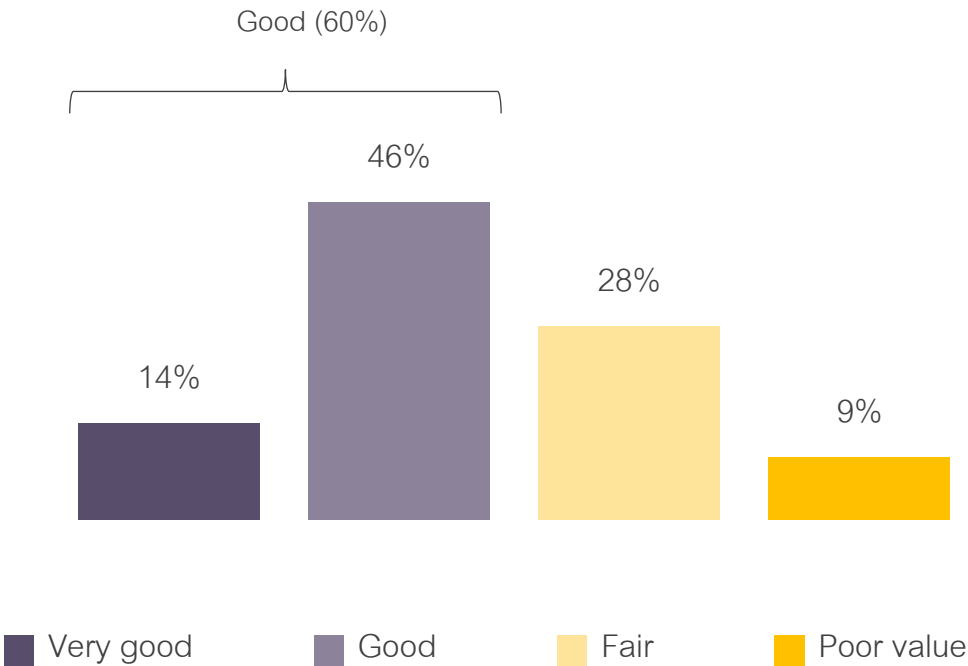
Right track
 Wrong track
 Don't know



Core Metrics | Tax Value for Services

Three in five Kitchener residents say they get a good value for their tax dollars. This number has dropped since 2018 (60% in 2022, as compared to 68% in 2018), with the proportion of those who say they get 'fair' value has more than doubled since 2018. This change is statistically significant.

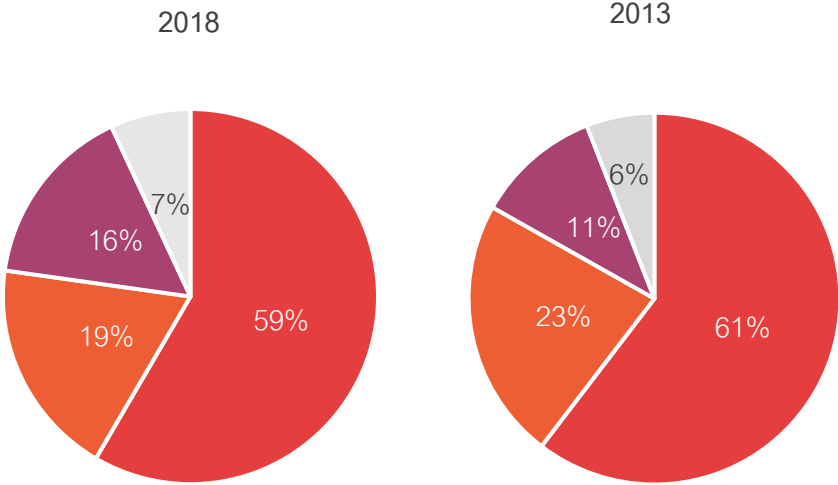
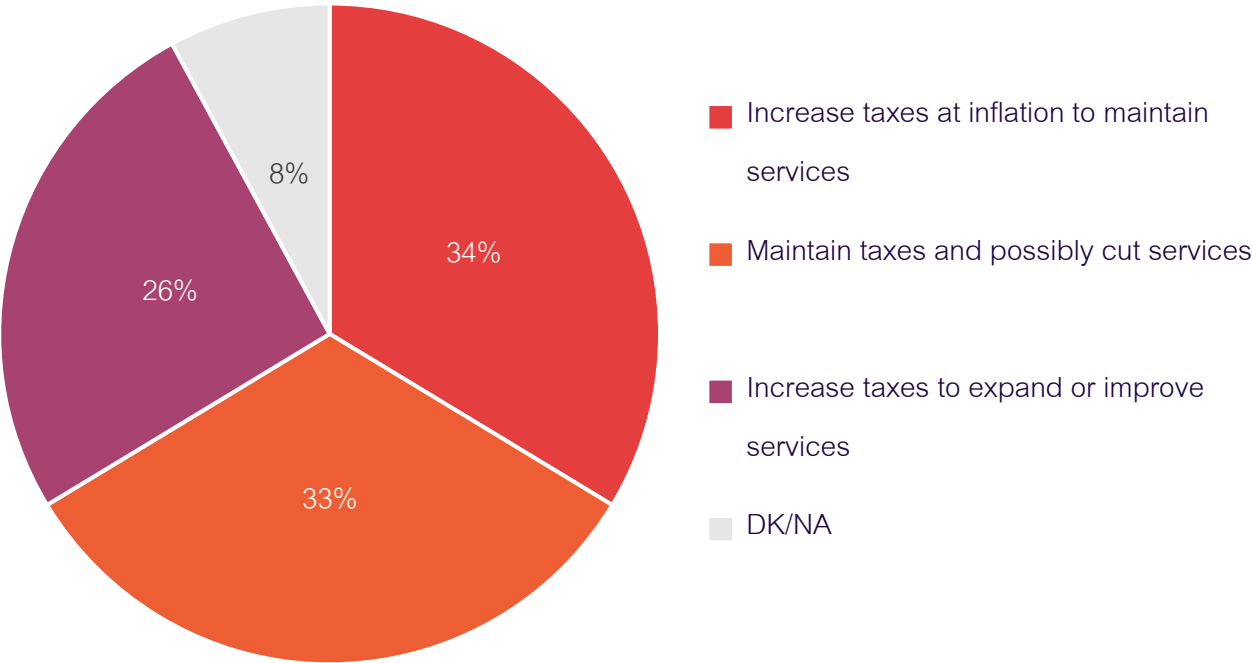
Q4. Thinking about all the programs and services you receive from the City of Kitchener, would you say that, overall, you receive ... for your tax dollars? (N=1,006)



Core Metrics | Delivering Services with Taxation

2022 sees Kitchener residents less resolute than in previous years to sustain a tax increase at the rate of inflation in order to maintain services.

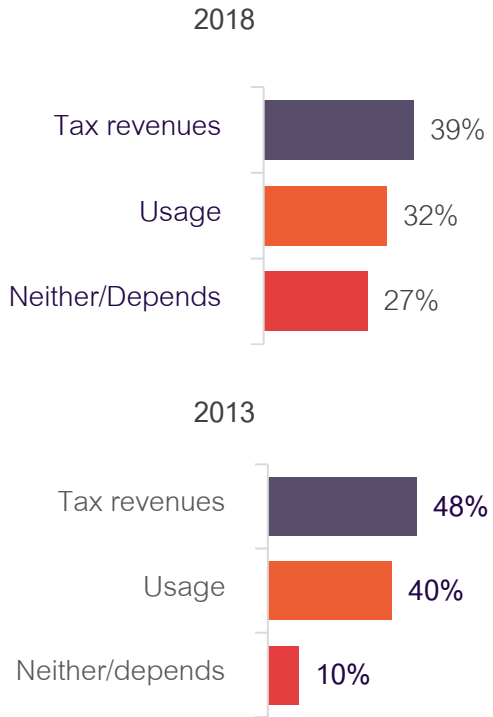
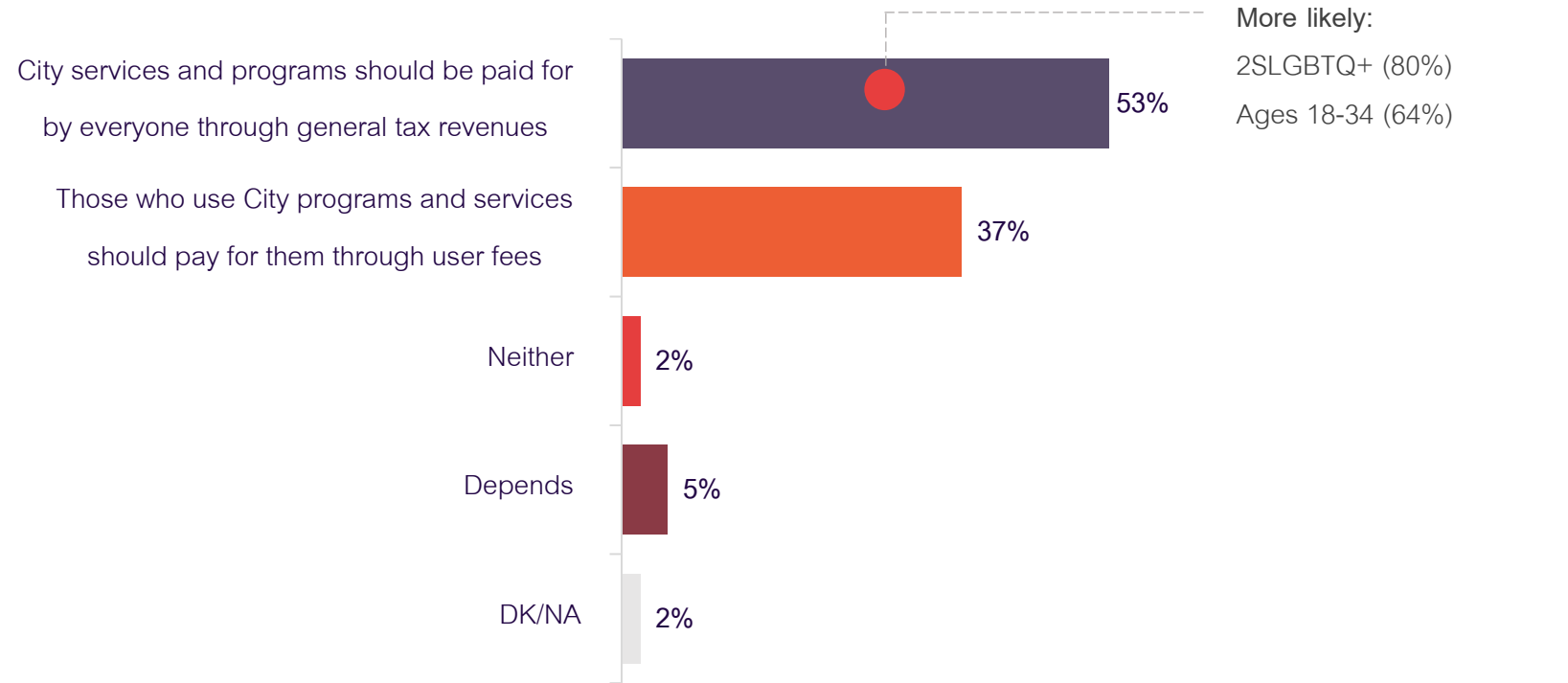
Q5. Local governments must balance the cost of delivering services with taxation. Which option would you most prefer in your city? (N=1,006)



Core Metrics | City Services and Programs

Just over half of Kitchener residents say City services should be paid for by everyone through general tax revenues (53%). This number has increased significantly since 2018 (+14%). Those who identify as 2SLGBTQ+, as well as those who are 18-34 are most likely to prefer this option (80% and 64%, respectively).

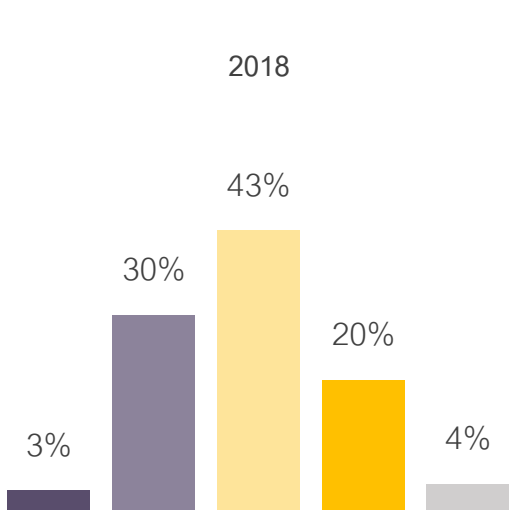
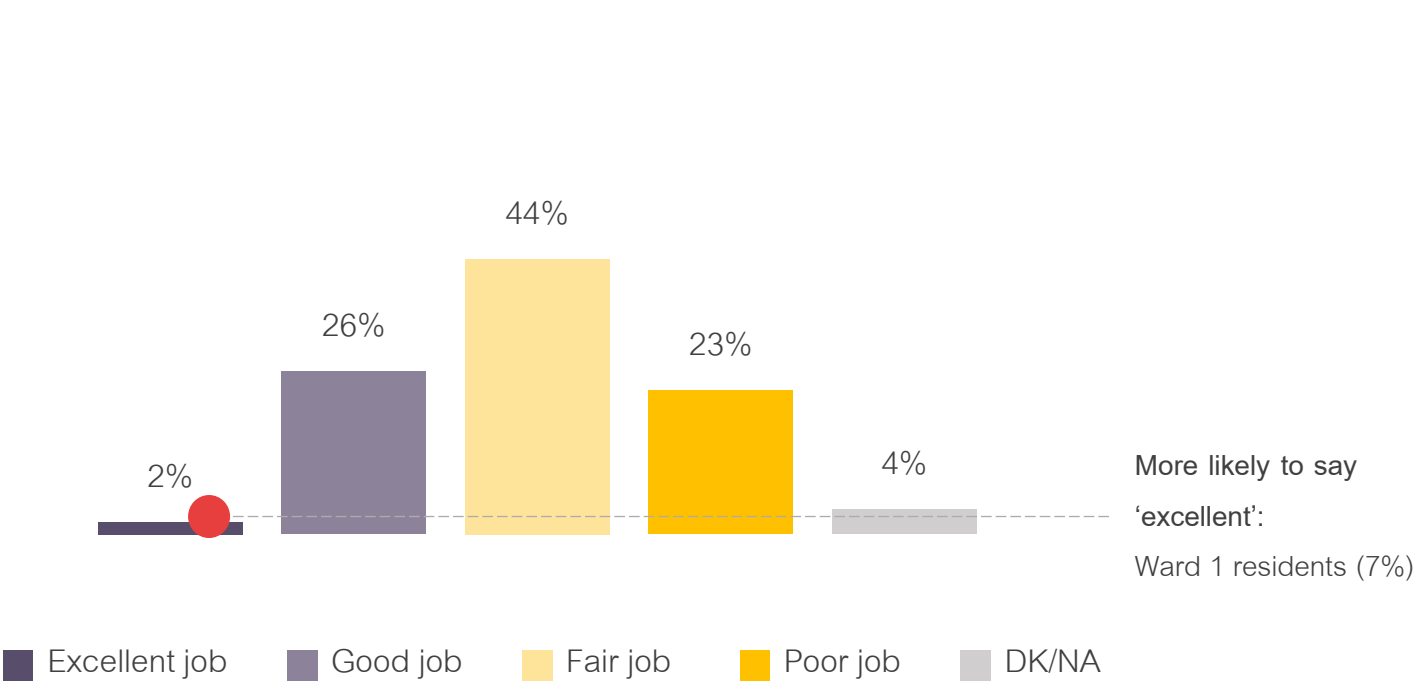
Q6. Which of the following statements is closer to your own opinion? (N=1,006)



Core Metrics | Communicating How Taxes are Spent

Many Kitchener residents say the City does a fair job communicating how tax dollars are spent. Ward 1 residents, however, are more likely to say their City does an excellent job with this communication (7%). Proportions have stayed stable since 2018.

Q7. How well does the City communicate how your tax dollars are spent? Does it do an ... (N=1,006)

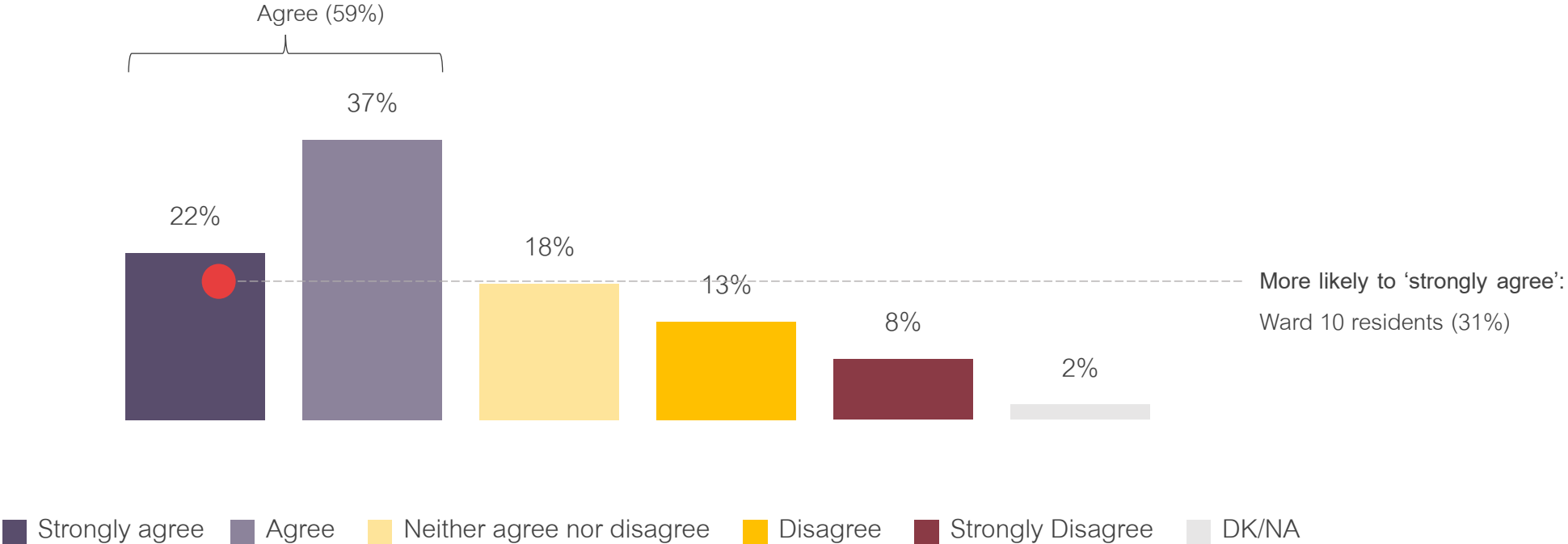


SUSTAINABILITY

Sustainability | City Budget and Climate Change

Over half of Kitchener residents agree that it is important to use more of the City's budget to address climate change, while about one fifth are on the fence, neither agreeing or disagreeing. Residents from Ward 10 are most likely to agree with this statement (31%).

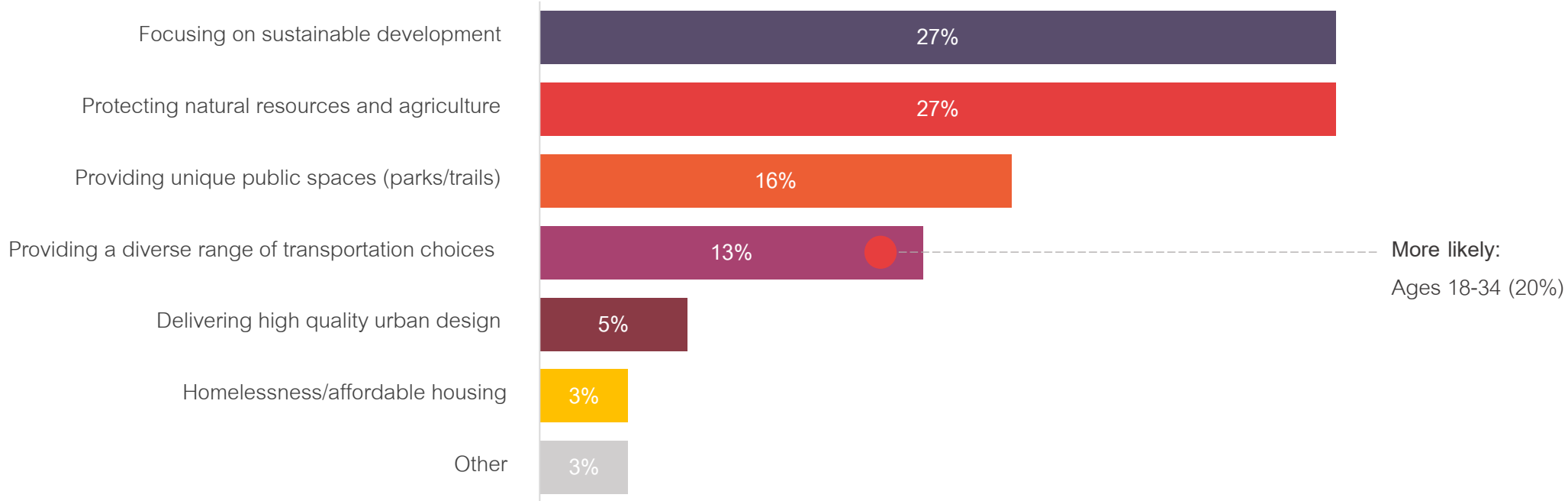
Q8. b) How much do you agree or disagree with the following statement: It is important to use more of the City of Kitchener's budget to address climate change. (N=1,006)



Sustainability | Importance of Considerations

Residents of Kitchener are split on the most important sustainability considerations for the future of the City: just over one quarter say the City should focus on sustainable development, while the same proportion say it should work to protect natural resources and agriculture (27%).

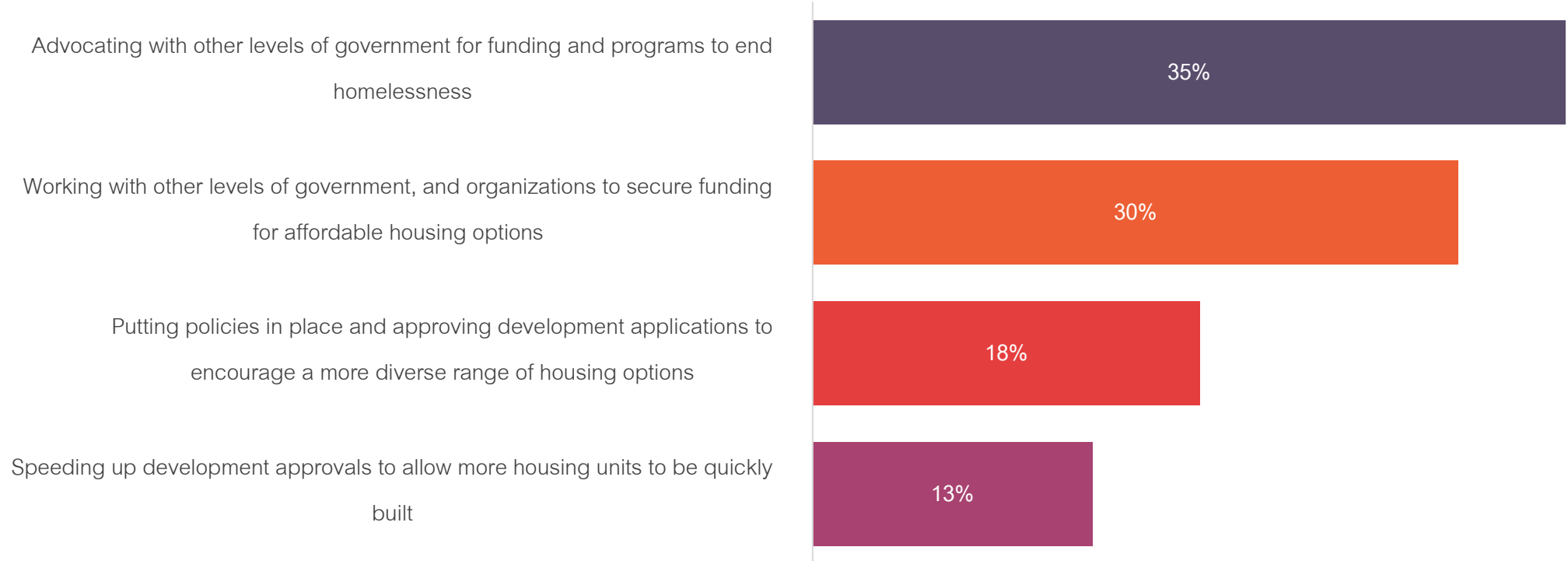
Q8. c) As Kitchener changes over time what is the most important item that should be considered... (N=1,006)



Sustainability | Addressing Housing Shortages

Over one third of Kitchener residents think the City should focus on advocating with other levels of government to fund programs that will end homelessness, while a slightly smaller proportion of residents say the City should work with other levels of government *and* organizations to secure funding for affordable housing options (30%). Only 13% want faster development approvals.

Q8. d) When it comes to addressing housing and homelessness, which one of the following actions should the City focus on: (N=1,006)

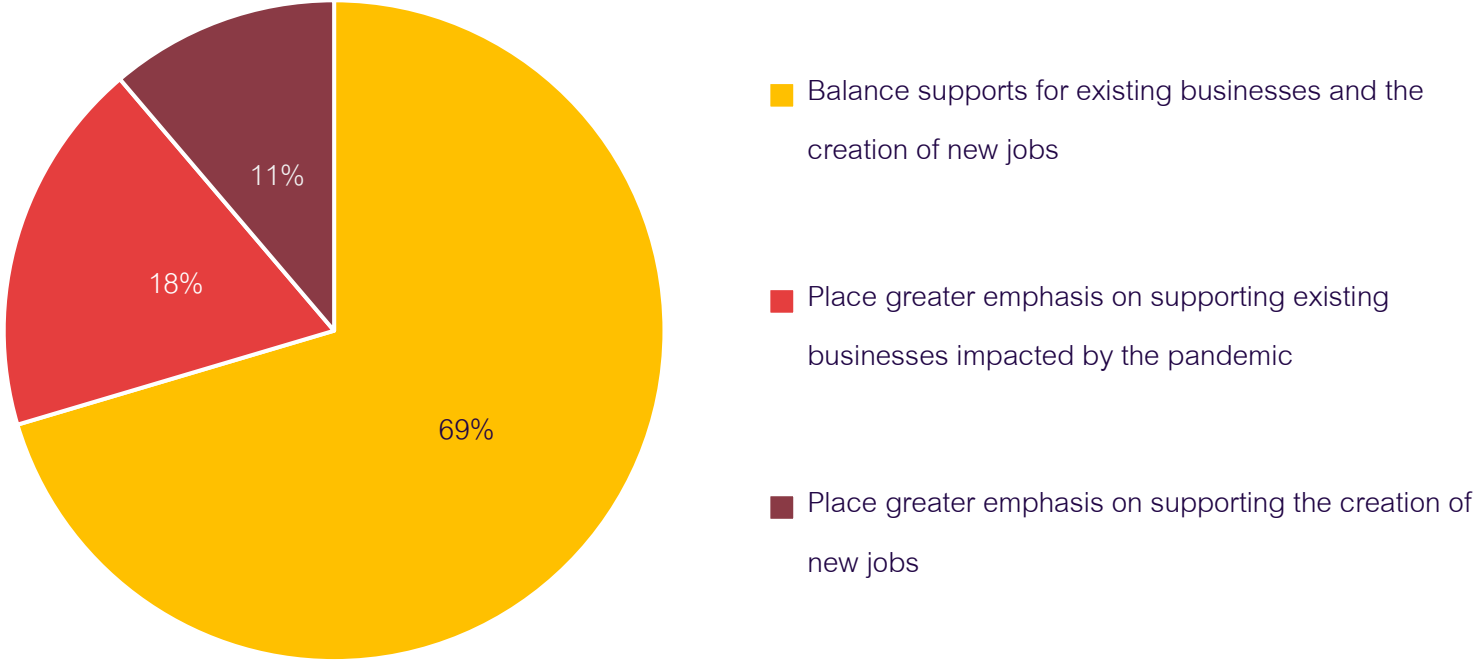


ECONOMIC DEVELOPMENT

Economic Development | **Supports for Jobs**

Rather than focusing primarily on supporting existing businesses or placing emphasis on the creation of new jobs, a sizeable majority of Kitchener residents want to see the City balance these two policies.

Q9. Which of the following statements is closest to your own opinion? The city should... (N=1,006)

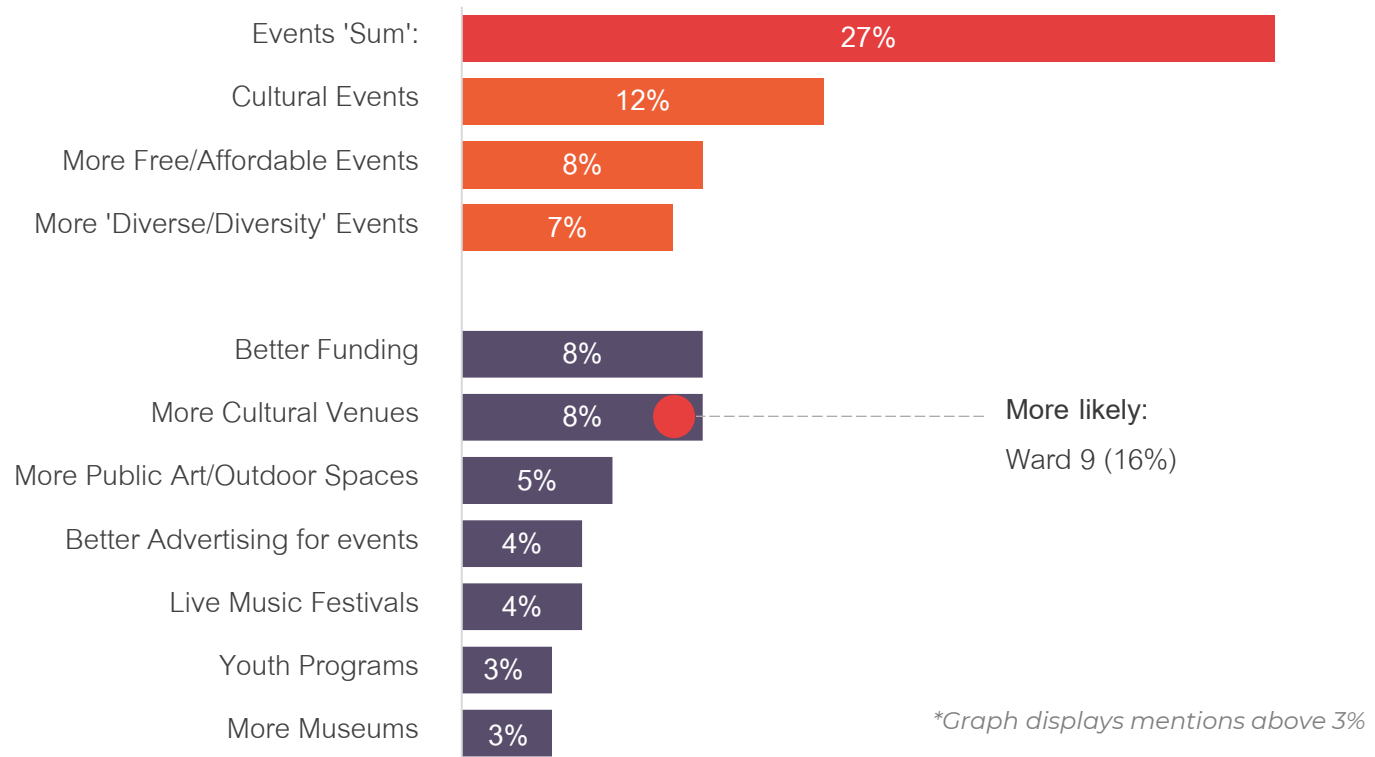


RECREATION, ARTS, AND CULTURE

Recreation, Arts and Culture | Resident Perceptions

On the topic of Arts and Culture, Kitchener residents want to see a general larger investment in events: from hosting events, making them affordable, and focusing on diversity events. Specifically, Kitchener residents believe a focus on cultural events is the best way to make Kitchener arts and culture even better (12%). Of least interest are youth programs and more museums (3% each).

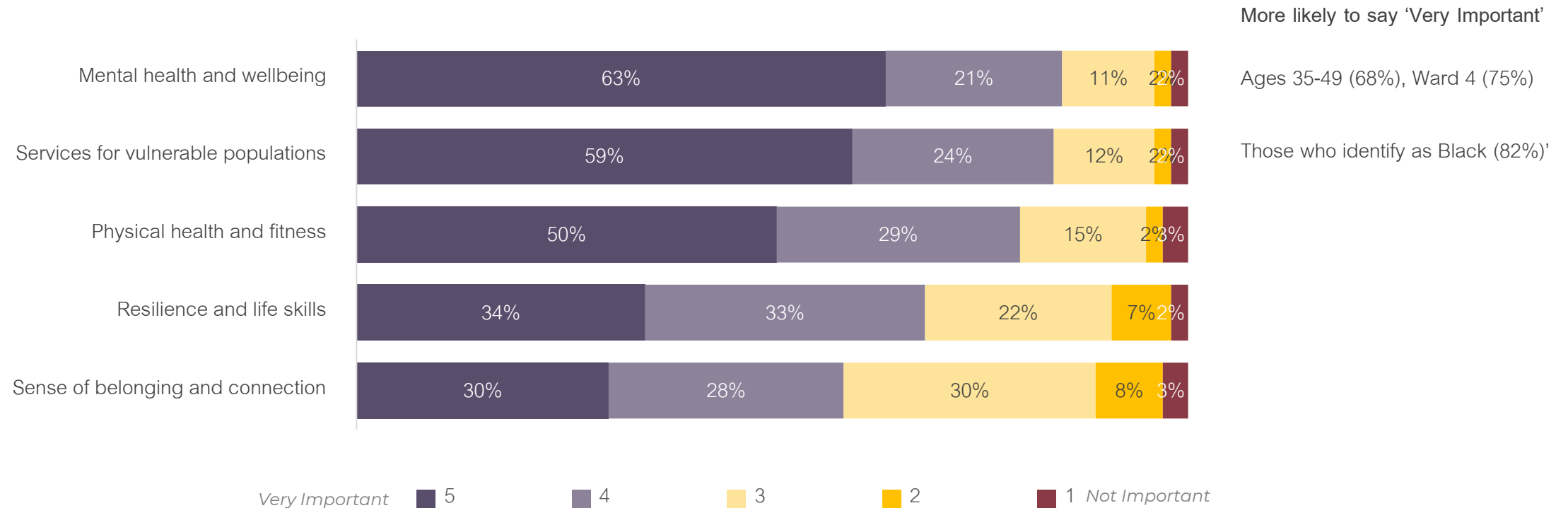
Q10. a) Arts & Culture plays an important role in the daily life and vibrancy of our city. In your opinion, what would make Kitchener arts and culture even better? (N=1,006)



Recreation, Arts and Culture | **Recreation and Programs**

Kitchener residents prioritize recreation and leisure programs that support mental health and well-being and that provide services for vulnerable populations (63% and 59% say “very important”, respectively). Those ages 35-49, and those living in Ward 4 are more likely to want support for mental health programs, while those who identify as Black are more likely to prioritize more services for vulnerable populations.

Q10. b) Please indicate on a scale of 1 to 5 with 1 being not important, to 5 being very important, how important it is that the City offer recreation and leisure programs that support the following: (N=1,006)

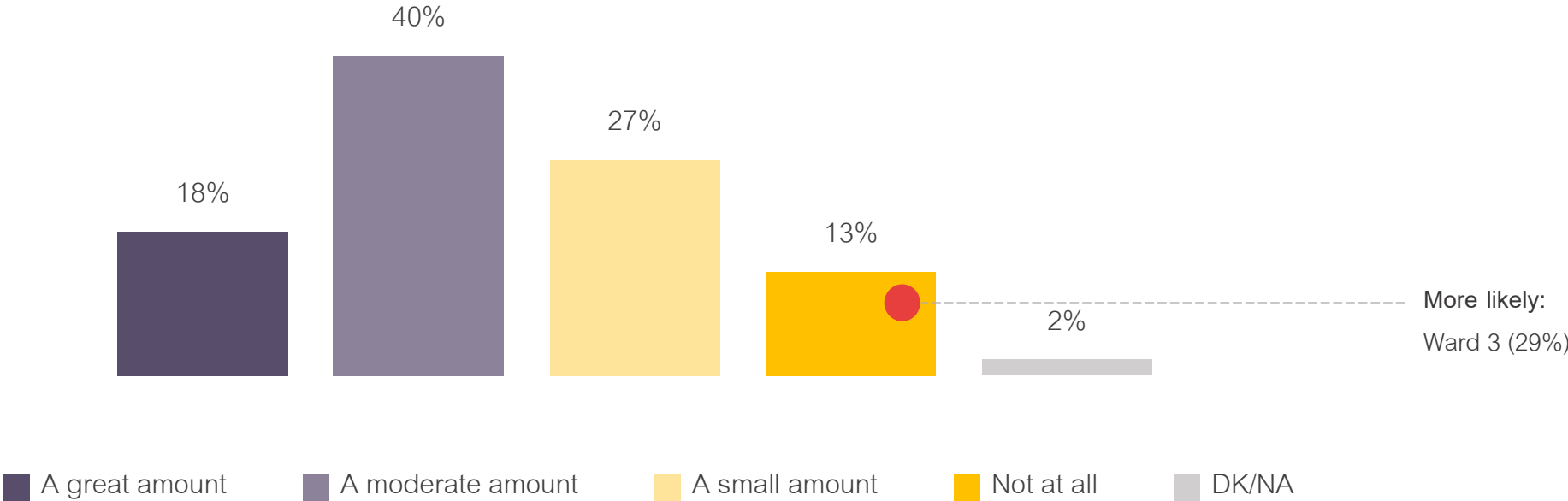


PUBLIC ENGAGEMENT

Public Engagement | Participation in City Planning

More than half of all residents report they are motivated to participate in City planning for the future of Kitchener, of which 18% are motivated “a great amount”. Ward 3 residents are least likely to be interested in this form of participation.

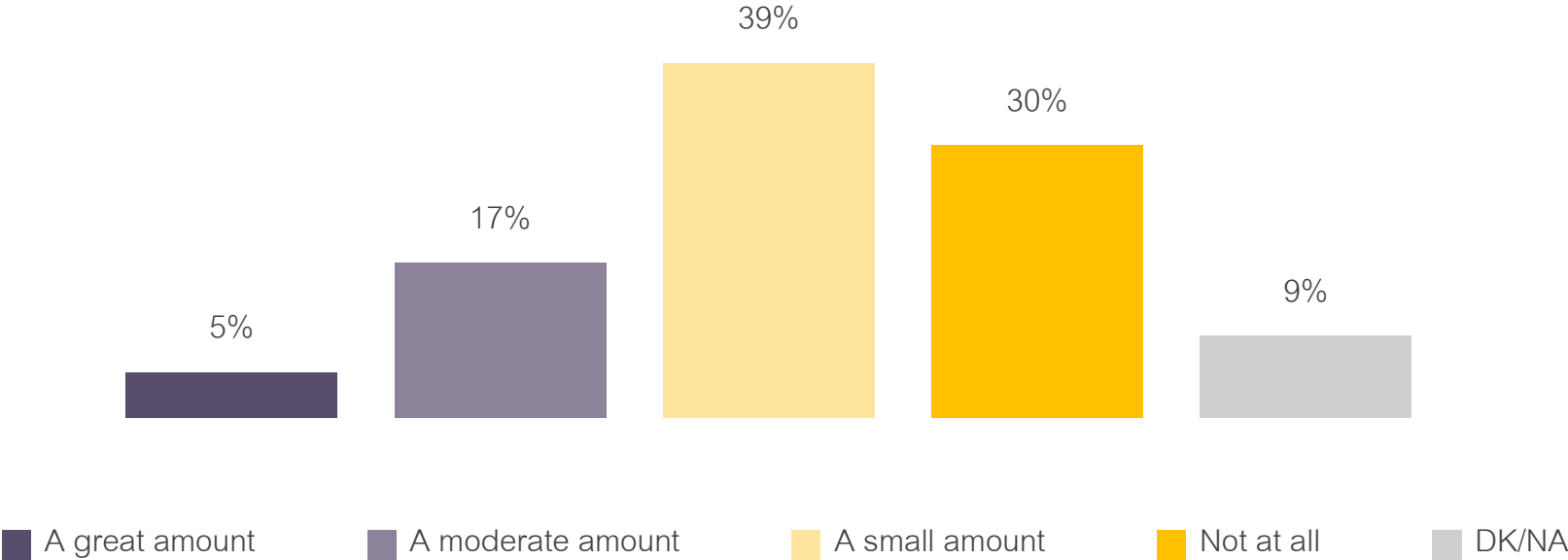
Q11. a) How motivated are you to participate with the City in planning for the future of Kitchener? (N=1,006)



Public Engagement | **Influencing City Decisions**

Two in five residents believe their input has influenced City decisions “a small amount” (39%), while 30% believe they have no influence at all.

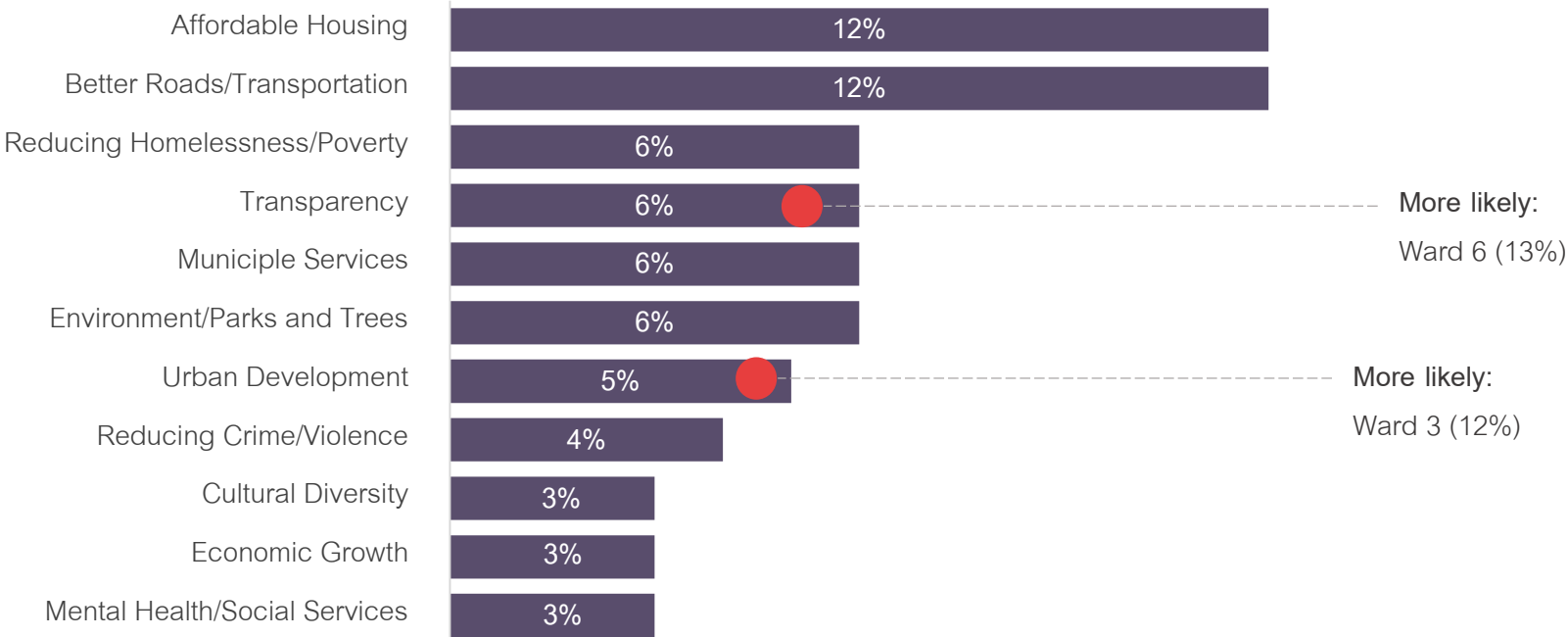
Q11. b) If you have provided comments to the City, how much do you think your input has influenced the City’s decision? (N=1,006)



Public Engagement | Improving the City

Asks from Kitchener residents regarding how to make the City a better place line up with their concerns around top issues in the City. Specifically, citizens want to see more affordable housing and better roads and transportation to make the City a better place.

Q12. What is one thing that the City can do to make Kitchener a better place? (N=1,006)



DEMOGRAPHICS

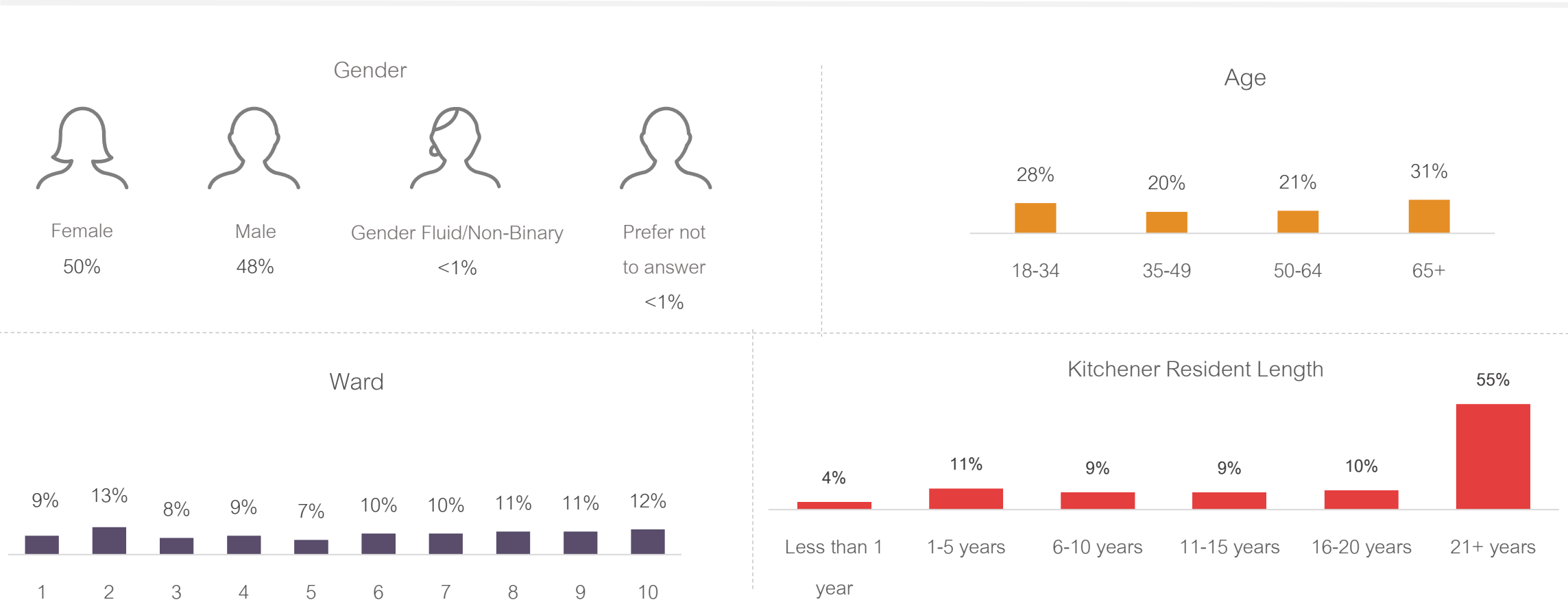
DEMOGRAPHICS

Given the importance of the statistical significance and demographically representative makeup of the survey results, the following pages outline:

1. The demographics of respondents for this survey (Pages 30-32);
2. Comparative demographics of respondents as compared to their natural distribution in the population (Pages 33 and 34) ; and,
3. Notes on any comparisons to former waves of the research (Page 35).

City of Kitchener | Demographics

Demographics of telephone survey participants are below:



City of Kitchener | Demographics

Demographics of telephone survey participants are below:

Rent or Own



Rent
33%

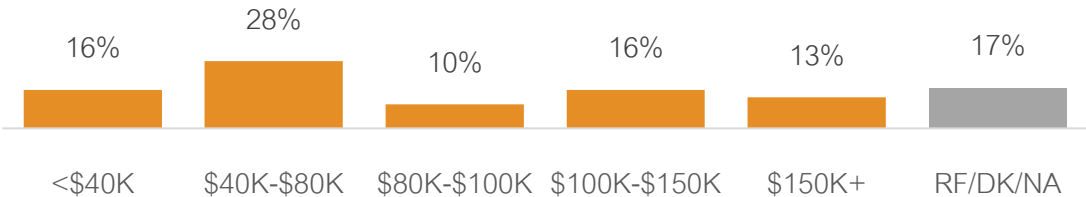


Own
65%

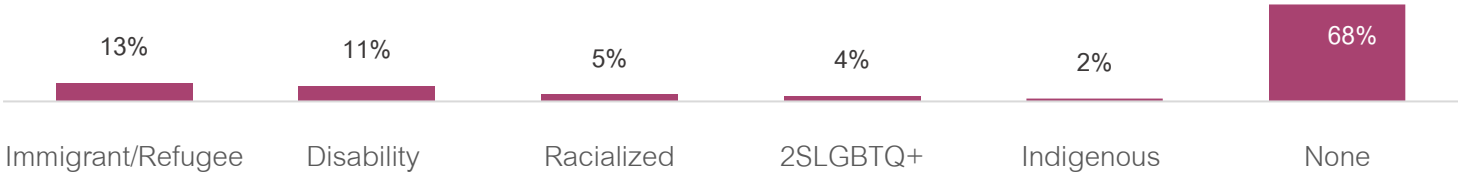


RF/DK/NA*
3%

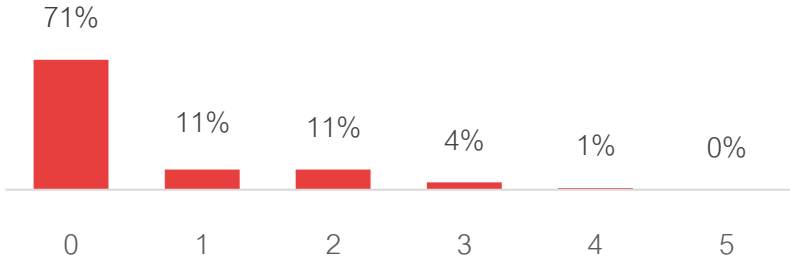
Household Income



Group Identity



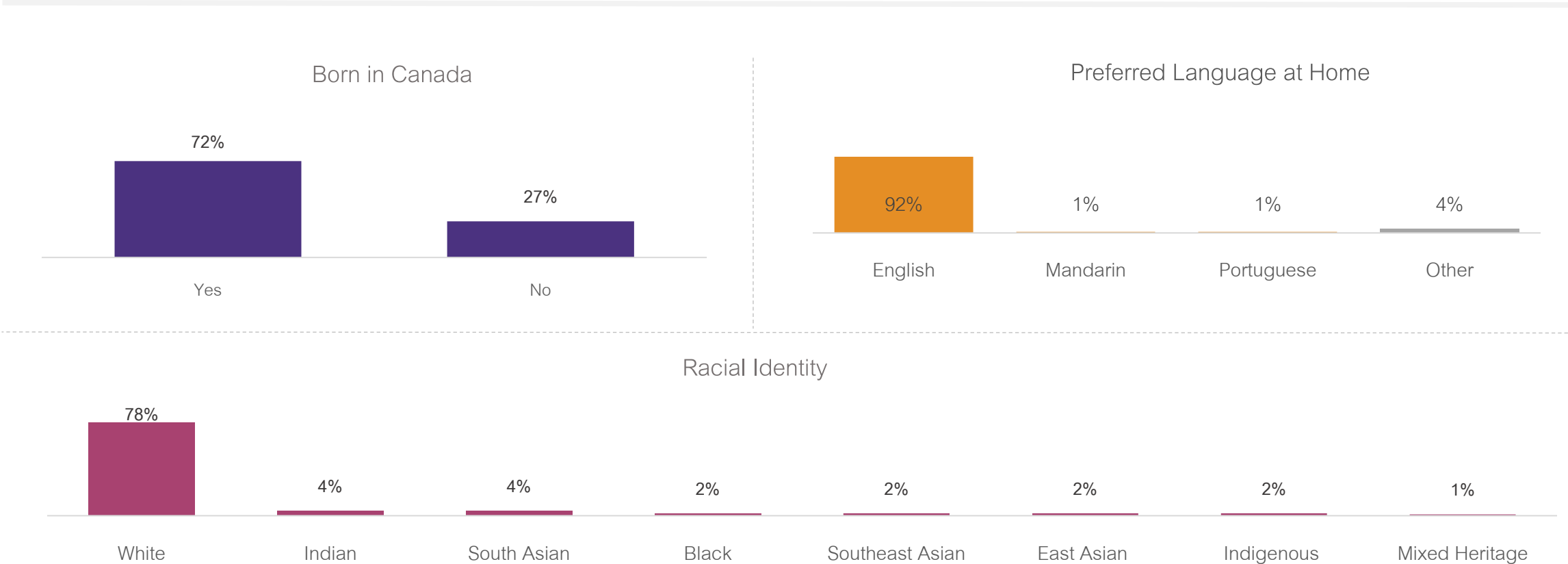
Household Members Under Age 18



*RF/DK/NA – Refused, don't know, not applicable responses

City of Kitchener | Demographics

Demographics of telephone survey participants are below:



City of Kitchener | Demographics

The following tables outline weighted demographics achieved against the natural distribution within the Kitchener population.

GROUP	% OF SAMPLE ACHIEVED	% OF POPULATION/QUOTA
Gender		
Male	50%	49%
Female	48%	51%
Gender Fluid/ Queer/Non- Binary/Trans	<1%	<i>Result not available</i>
Prefer not to Answer	1%	N/A
Age		
18-34	28%	28%
35-49	20%	20%
50-64	21%	20%
65+	31%	30%

GROUP	% OF SAMPLE ACHIEVED	% OF POPULATION/QUOTA
Ward		
Ward 1	9%	9%
Ward 2	13%	13%
Ward 3	8%	8%
Ward 4	9%	9%
Ward 5	7%	7%
Ward 6	10%	10%
Ward 7	10%	10%
Ward 8	11%	10%
Ward 9	11%	9%
Ward 10	12%	9%

City of Kitchener | Demographics

The following tables outline weighted demographics achieved against the natural distribution within the Kitchener population. Note: Racialized samples represent best efforts.

GROUP	% OF SAMPLE	% OF POPULATION/QUOTA
Racialized Groups		
White	78%	70%
Black	2%	5%
Latin American	1%	3%
West Asian	1%	3%
South Asian	8%	6%
Southeast Asian/ East Asian	4%	7%
Indigenous	2%	3%

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CITY OF KITCHENER: PUBLIC SURVEY



A Quantitative Survey of Kitchener Residents
Presentation to City Council, May 9, 2022

ENVIRONICS
RESEARCH

In partnership with REFOCUS, the City of Kitchener commissioned Environics Research to conduct a telephone survey with a representative sample of Kitchener residents on municipal issues and City priorities. Results are contributing to the 2023-2026 Strategic Plan.



METHODOLOGY

Computer Assisted Telephone Interviews (CATI) – Including landline and cellphone-only households (50/50).



FIELD DATES

March 18 – April 4, 2022



SAMPLE

N=1,006; representative sample of Kitchener population, including age, gender and region/wards.



MARGIN OF ERROR

+/-3.1%, nineteen times out of twenty

Updates to the Public

Survey: The 2022 Public Survey adopted a different approach to data collection and a lens on data analysis than previous surveys. The shift resulted in survey data that captures the diverse composition of Kitchener's population in a way that is rigorous and representative.



CAPTURING DIVERSITY

In recognition of the City of Kitchener's commitment to better capturing and representing the full diversity of its communities through engagement activities, the 2022 Public Survey includes questions and language that invite and capture feedback from Kitchener's diverse communities.

2022 survey results reflect a greater emphasis on and awareness of the diversity present through the use of inclusivity-focused questions that acknowledge the diversity of demographics such as age, region, race and gender identity within the City.

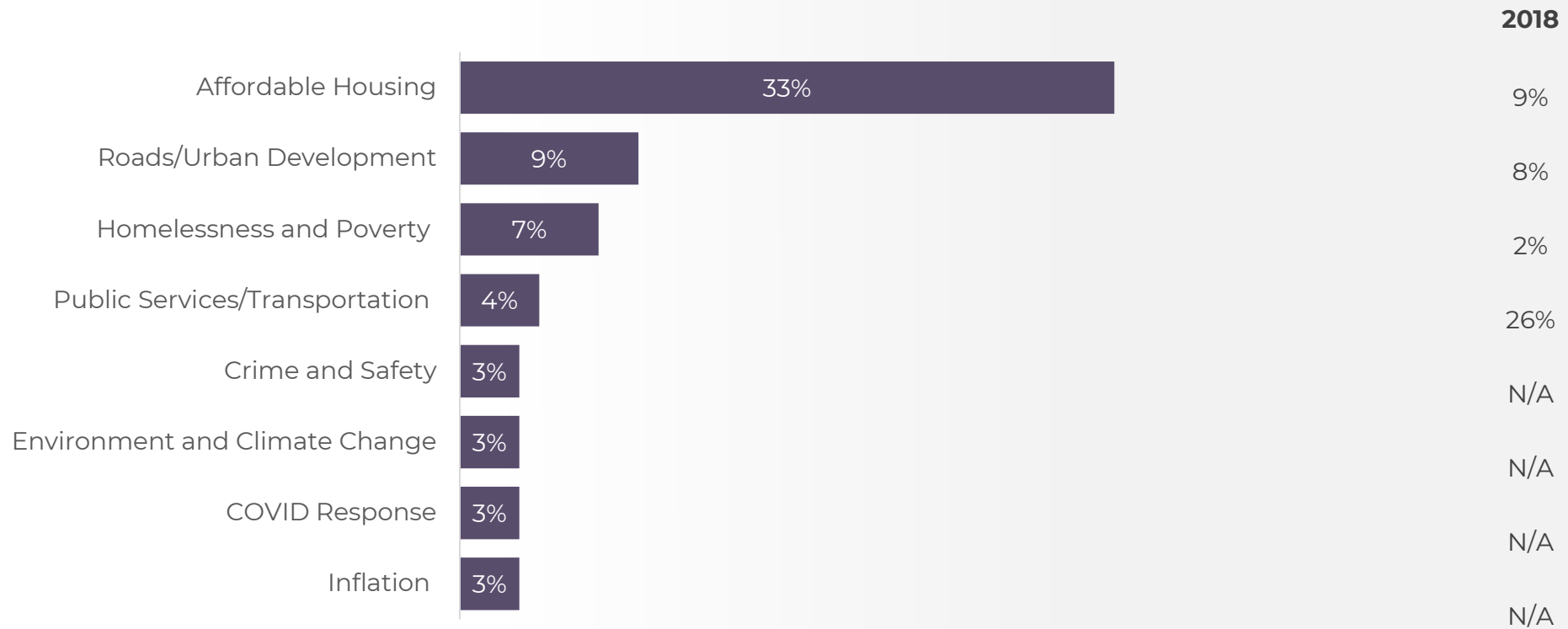
Where evident in the data, statistically significant differences among communities are highlighted in the final report.

Demographics

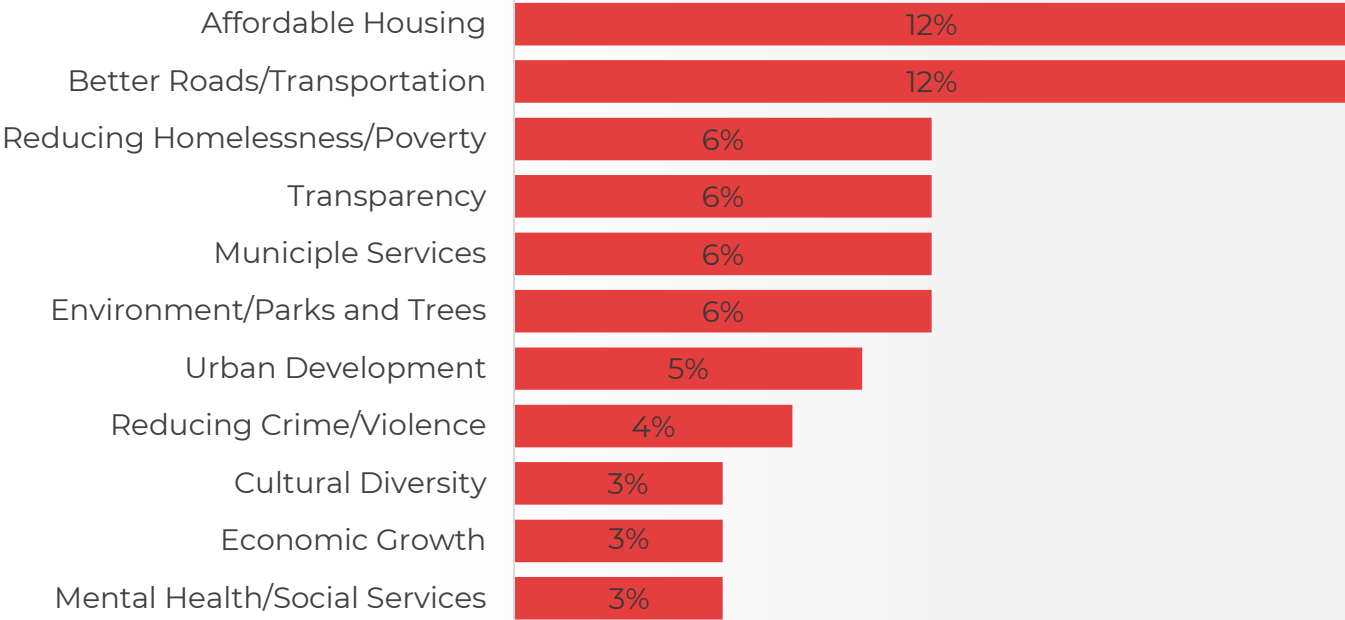
GROUP	% OF SAMPLE	% OF POPULATION/QUOTA
Identified Gender		
Male	50%	49%
Female	48%	51%
Gender Fluid/ Queer/Non- Binary/Trans	<1%	<i>Result not available</i>
Prefer not to Answer	1%	N/A
Age		
18-34	28%	28%
35-49	20%	20%
50-64	21%	20%
65+	31%	30%

GROUP	% OF SAMPLE	% OF POPULATION/QUOTA
Identified Ethnicity		
White	78%	70%
Black	2%	5%
Latin American	1%	3%
West Asian	1%	3%
South Asian	8%	6%
Southeast Asian/ East Asian	4%	7%
Indigenous	2%	3%

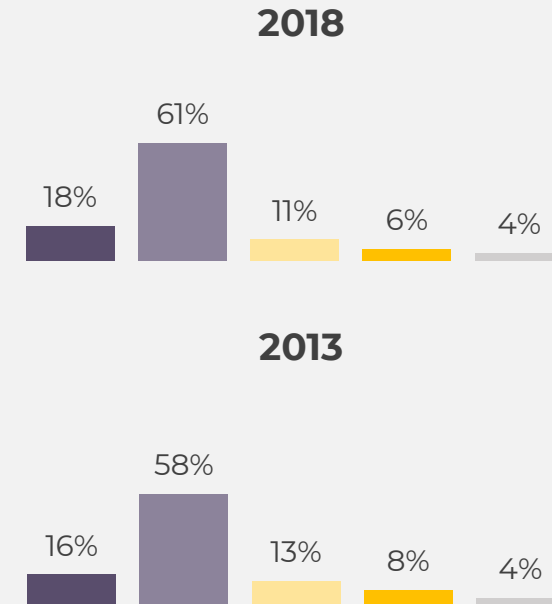
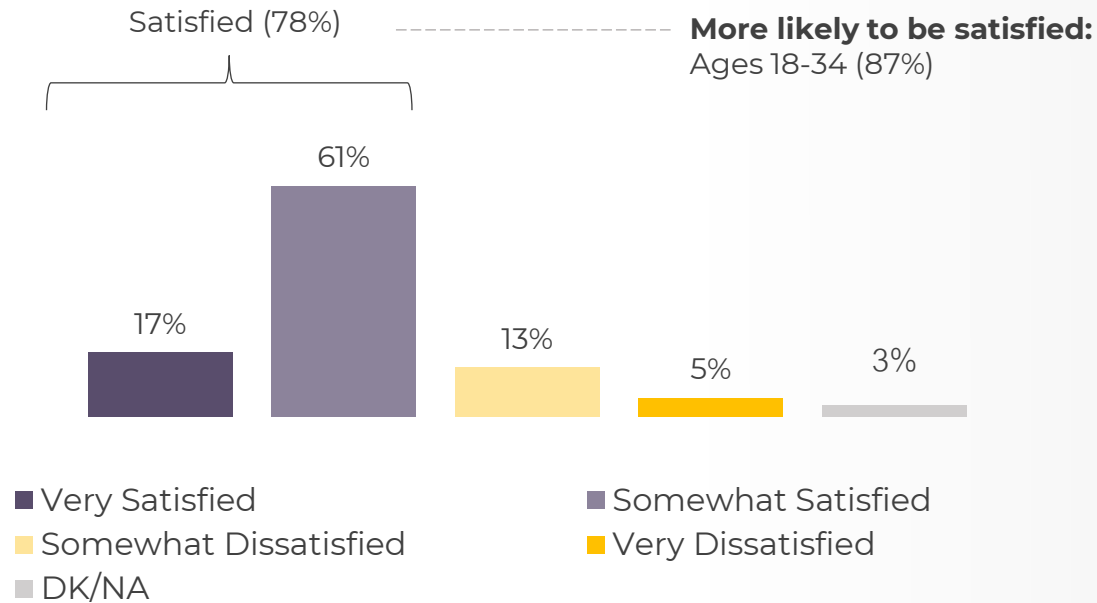
Top issues have changed considerably since 2018 with affordable housing topping the list.



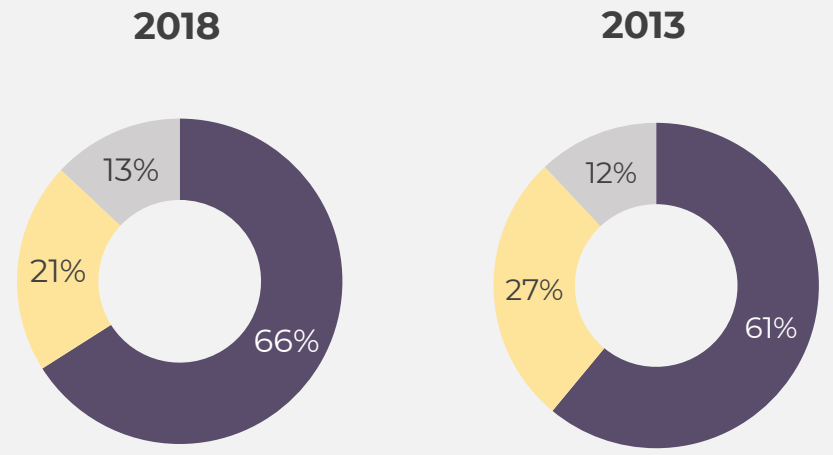
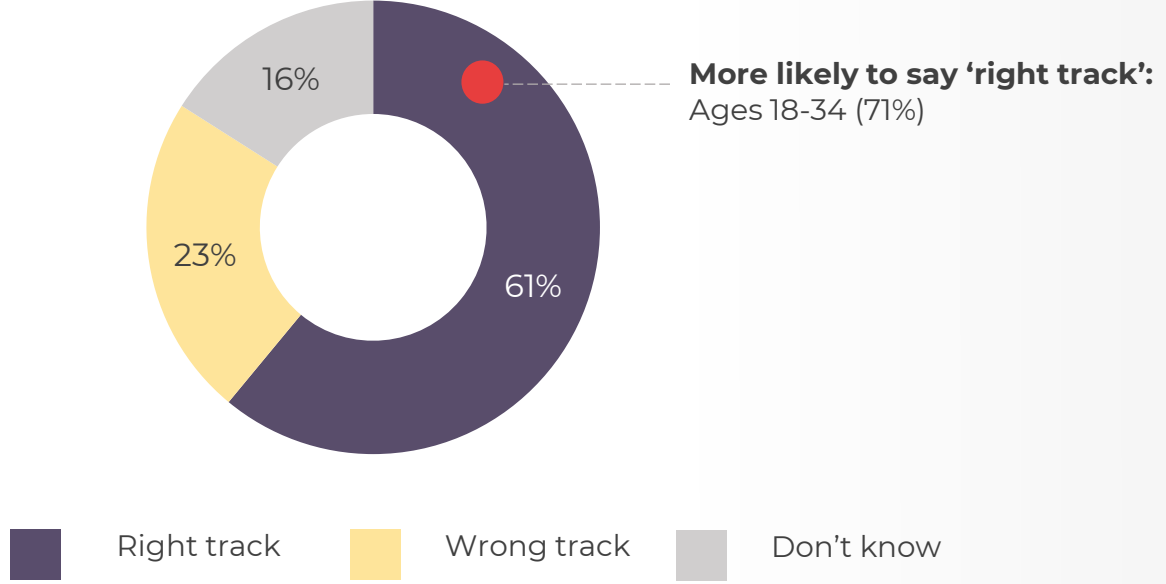
Citizens want to see more affordable housing and better roads/transportation to make the City a better place.



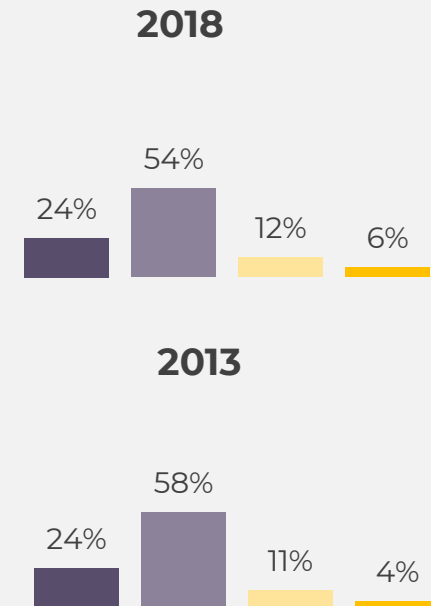
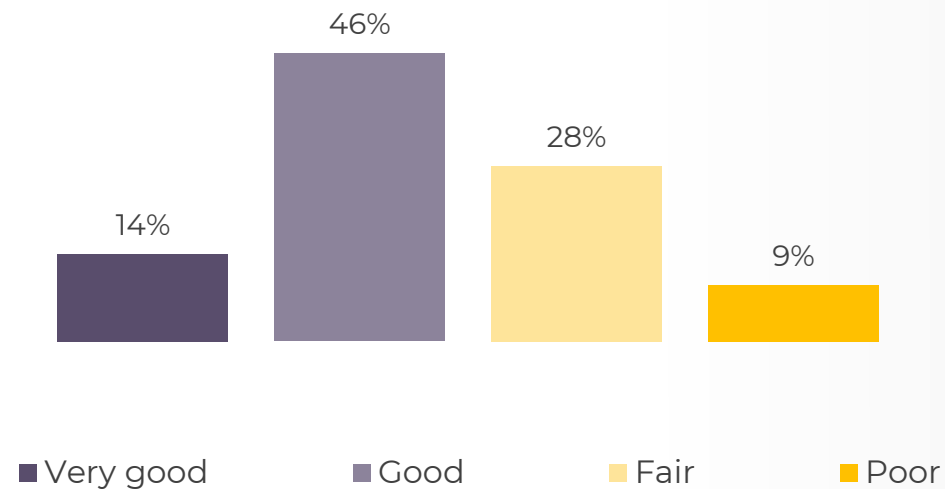
Satisfaction with the municipal government has remained stable since 2013.



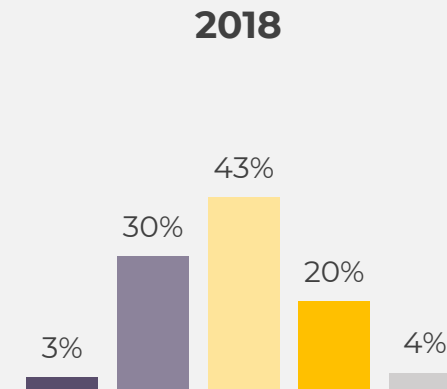
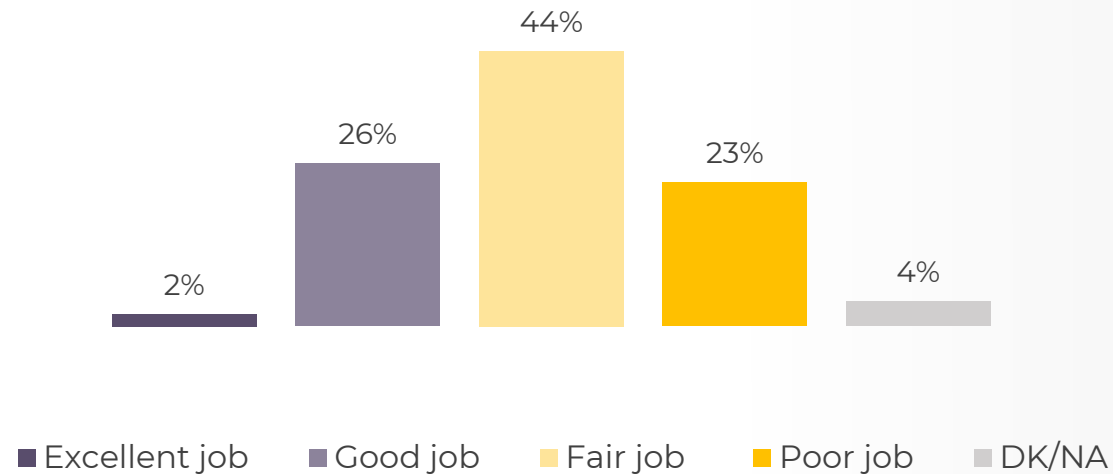
Most residents say the government is on the right track in addressing issues facing the community.



A majority feel they get good value for taxes but enthusiasm has waned since 2018.

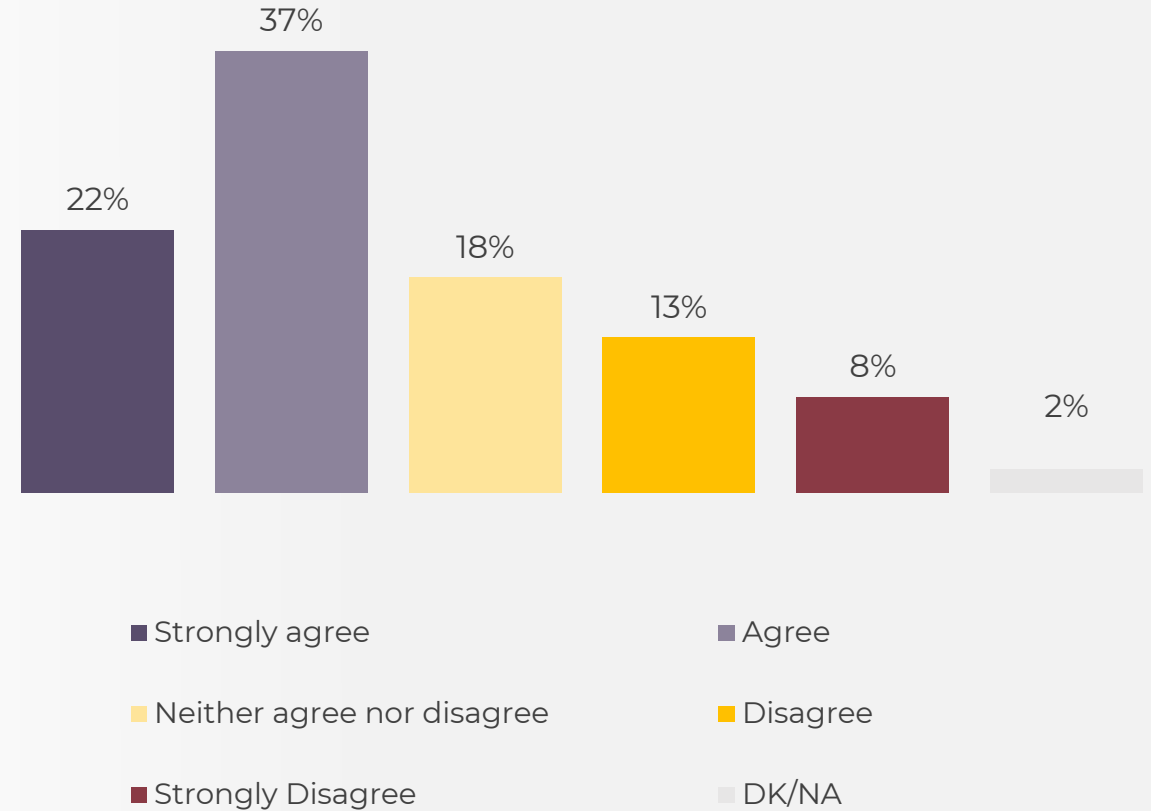


Many Kitchener residents say the City does a *fair* job **communicating how tax dollars are spent.**

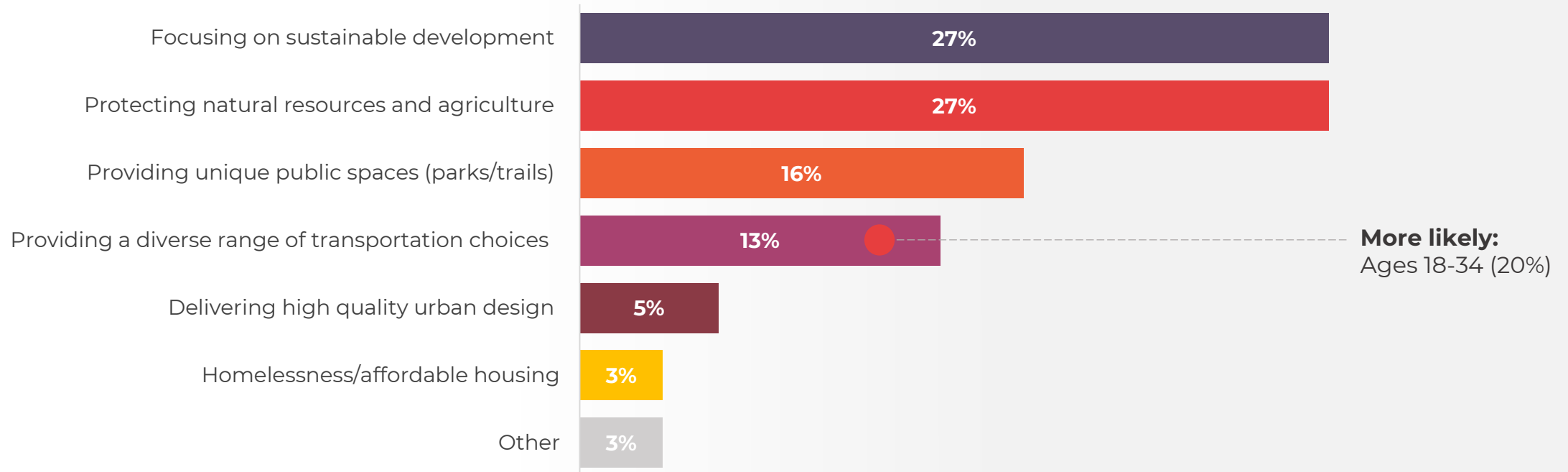


59%

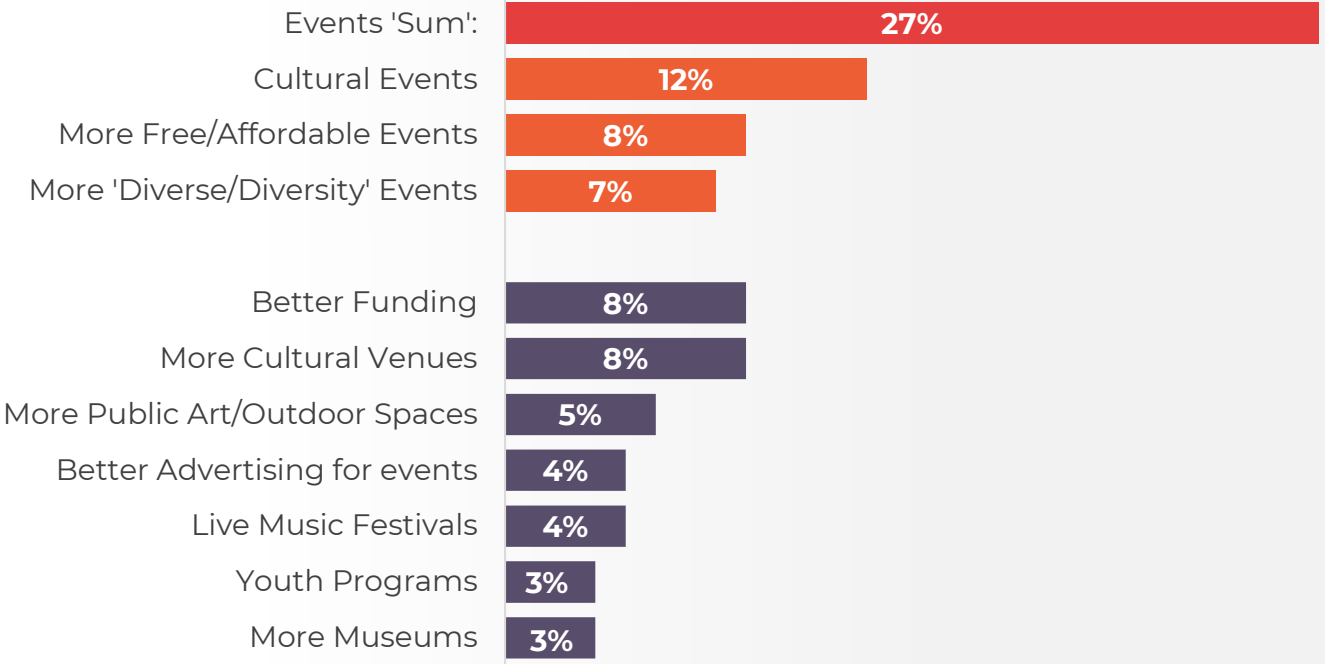
agree that it is important to **use more of the City's budget to address climate change.**



Residents of Kitchener are split on the most **important sustainability considerations** for the future of the City.

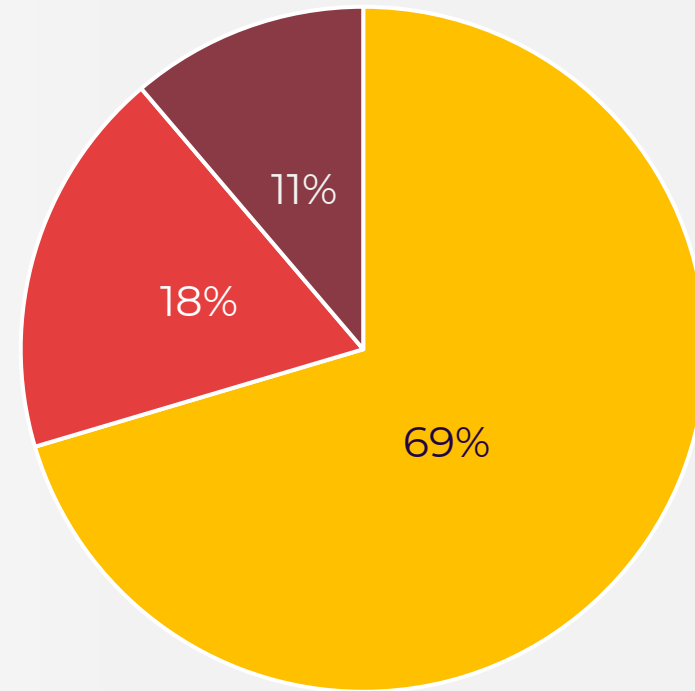


On the topic of Arts and Culture, Kitchener residents prioritize investment in **events**.



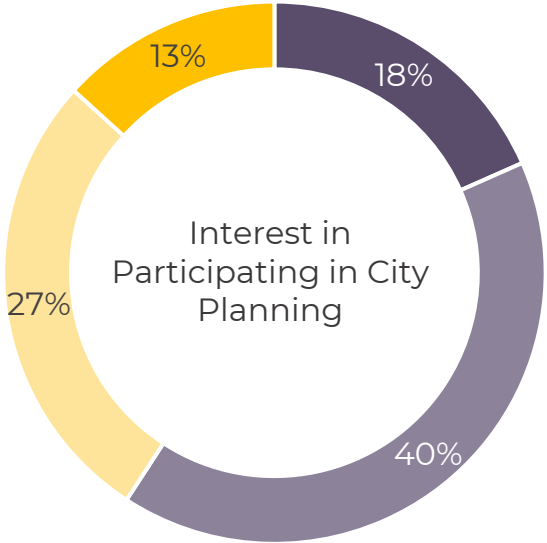
69%

want to see the City **balance** supporting existing businesses with the creation of new jobs.

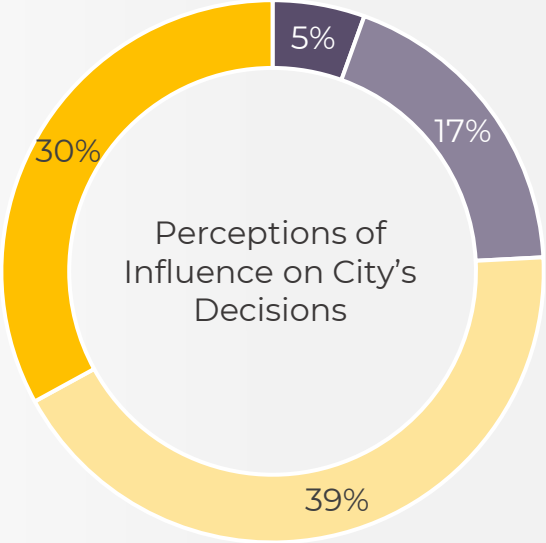


- Balance supports for existing businesses and the creation of new jobs
- Greater emphasis on supporting existing businesses impacted by COVID-19
- Greater emphasis on supporting the creation of new jobs

Motivations to participate in City planning are balanced by perceptions of the impact of participation.



- A GREAT AMOUNT
- MODERATE AMOUNT
- SMALL AMOUNT
- NOT AT ALL



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- MODERATE AMOUNT
- SMALL AMOUNT
- NOT AT ALL