County of Wellington Citizen Satisfaction Survey
June 21, 2023
TABLE OF CONTENTS

A  BACKGROUND & METHODOLOGY

B  KEY TAKEAWAYS

C  DETAILED FINDINGS

D  APPENDIX

1  LIFE IN THE COUNTY OF WELLINGTON

2  SERVICES: IMPORTANCE & SATISFACTION

3  PERSPECTIVE ON GROWTH & DEVELOPMENT

4  COMMUNICATING WITH CITIZENS

5  SPENDING AND TAXATION
BACKGROUND & METHODOLOGY
Background

The County of Wellington commissioned this survey to gain a detailed understanding of residents’ opinions about their experience living in the area, their level of familiarity with Wellington County, local government issues, and their attitudes towards the services offered by the County of Wellington.

Specifically, the research investigated:

• Perceptions of quality of life in the County of Wellington as well as pressing issues facing residents.
• The importance of and level of satisfaction with the services provided by the County of Wellington.
• Citizens’ perspectives about growth and development in the County.
• Preferred communication methods and effectiveness of communication between the County of Wellington and residents.
Methodology

An 18-minute survey was conducted with a representative and probabilistic sample of the adult population (18+) of the County of Wellington. A dual approach, with telephone and online surveys, was employed to collect the data.

In the telephone interviews, a mix of cell phone and landline telephone surveys were conducted, including n=209 interviews via cell phone, n=191 interviews via landline phones and n=3 interviews through the 1800 number offered, to a total of n=403 interviews completed via telephone.

For the online stream, the invitation was sent by mail to a randomized number of households using Canada Post address databases. The letter contained a link for users to type into their internet browsers, and a QR code was also offered. Each individual also received a unique passcode in order to participate in the survey. Ipsos mailed 5,000 letters to residents and received n=515 completed online surveys.

The surveys were conducted between April 25, 2023, and May 31st, 2023.

The overall margin of error for a sample of n=918 interviews is +/- 3.2%, 19 times out of 20.

Quota sampling and weighting according to the latest census data was applied according to age and gender and town/township to ensure that the survey results are representative of the adult population of the County of Wellington.

Data is compared against Ipsos Municipal Normative Database where applicable, which includes over 30 municipal studies conducted over the past 5 years.
KEY FINDINGS
AND EXECUTIVE
SUMMARY
Executive Summary

THE QUALITY OF LIFE THAT THE COUNTY OF WELLINGTON HAS TO OFFER IS A MAJOR HIGHLIGHT FOR RESIDENTS.

• An overwhelming majority of residents (96%) rate the quality of life in the County of Wellington as either ‘very good’ or ‘good’. A substantial proportion (42%) rate the quality of life as ‘very good’.

• Residents expressed a strong sense of safety, as 97% consider the County ‘very’ or ‘somewhat safe’.

• In addition, the majority of residents (62%) say their quality of life remained unchanged in the past 3 years, which is remarkable, despite the significant impact of the COVID-19 pandemic on both health and financial stability. However, it is worth noting that a quarter of the residents (26%) have experienced a decline in their quality of life.

• Residents provide a high rating of satisfaction (76%) with the County’s efforts to protect the environment.

• However, the area’s rapid growth concerns some residents, making road maintenance and housing the most commonly raised issues. Growth and development, although mentioned by fewer individuals, are frequently associated with these two top concerns and connected to environmental issues such as water and waste management, as well as with the protection of farmlands.
OVERALL LEVEL OF SATISFACTION WITH SERVICES PROVIDED IS HIGH, RESIDENTS HIGHLIGHT SOME OPPORTUNITIES TO ENHANCE CITIZEN SATISFACTION FURTHER.

• All in balance, a vast majority of residents say that they are satisfied with the level and quality of services provided by the County of Wellington.

• The majority of Wellington County residents place great importance on services related to growth, development, transportation, and social welfare. Specifically, land use planning, economic development, affordable housing, maintenance of County roads and infrastructure, and senior care services are highly valued by over nine out of ten residents. However, there is relatively less emphasis on museum facilities and programming, as well as on parking enforcement.

• Although attainable and affordable housing is highly regarded by citizens (88%), satisfaction score is mild (33%). Similarly, a large majority (94%) consider county roads and infrastructure vital, yet fewer residents (75%) express satisfaction with these services, which fall short of the municipality benchmark. Effective communication with residents is considered highly important (93%), and there is room for improvement in satisfaction scores (68%).
RESIDENTS ARE OPTIMISTIC ABOUT THE COUNTY’S FUTURE, AND MOST THINK IT IS POSSIBLE TO ACHIEVE A BALANCE BETWEEN GROWTH AND QUALITY OF LIFE, EFFECTIVE COMMUNICATION CAN PLAY A VITAL ROLE THROUGH THIS PROCESS.

• The majority of residents (90%) are optimistic about the County’s future. Moreover, two-thirds of the population agree that the County does a good job managing the level of development and growth of the area, showing that Wellington County performs better than many other Canadian municipalities (65% vs 53% Ipsos municipal normative score).

• To provide the necessary support and foster a better sense of satisfaction among citizens, enhancing communication with the County is essential. Currently, a majority of residents (58%) believe that the County of Wellington communicates effectively with its citizens, indicating room for improvement in this specific area.

• Many (60%) have accessed the County website in the past year, and most of those who accessed the website (88%) find it useful.

• When it comes to preferred means of communication, the top preference is for e-mails (48%) and regular mail (38%). However, depending on who your message is targeted to, you may want to consider social media, which is particularly popular among those under the age of 35, or newspapers or newsletters, which are more preferred among those aged 55 and above.
Executive Summary (cont.)

RESIDENTS OF THE COUNTY OF WELLINGTON EXPRESS FAMILIARITY WITH THE COUNCIL, HIGH APPROVAL RATINGS, BUT LIMITED KNOWLEDGE OF MUNICIPAL TAX SPENDING.

• Familiarity with the County of Wellington Council is widespread (67%), but only a small portion (5%) claim to be very familiar.

• Approval of County Council’s performance is high (76%), and it is higher among older residents (55 year of age and older).

• Fewer than half of residents (46%) indicate that they are knowledgeable about how the County spends tax revenue. A small majority of residents (35%) would prefer to increase taxes to maintain or enhance services.
LIFE IN THE COUNTY OF WELLINGTON

Image Source: County of Wellington website (www.wellington.ca)
Most Important Issues Facing the Community

- **Road maintenance (23%)** and **housing (21%)** are cited as the primary concerns among Wellington County residents. ‘Growth and development’, although mentioned by fewer individuals (14%), is frequently associated with these top concerns and is also connected to environmental issues such as water and waste management, as well as the protection of farmlands.

- Concerns about **road maintenance** are equally important among all residents, while **housing (40%)** and **economy/jobs (29%)** are significant among lower-income households with an income below $40K. On the other hand, **taxation/government spending (20%)** stands out for households with an income of $120K or more. Growth/development is prevalent among older residents (55+ years, 18%) and affluent households ($120K+, 17%). Those residents who have more recently moved to the County (under 5 years) primarily mention crime and public safety concerns (19%).

```
Roads Maintenance 23%
Housing 21%
Growth/Development 14%
Taxation/Municipal Government Spending 14%
Economy and Jobs 12%
Crime/Public Safety 10%
Affordability/Cost of Living 8%
Infrastructure 8%
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Environment and Climate Change 7%
Child Care 6%
Physical and Mental Health 6%
Waste Management 6%
Access to Recreational Activities/Community Centers 5%
Protect Agriculture/Farmland 5%
Water Management 5%
Traffic 4%
Other 9%
Don't Know/Nothing 8%
```

**Road resurfacing** - a lot of potholes and cracks make for an extremely hard drive in my vehicle, and a dangerous ride on my bike.

**Roadways. There's a lot of growth here, we need more arteries.**

A lot of land is being bought out for low-cost housing, but the lowest cost is $1-2 million dollars (…) they're not affordable (…) instead of agricultural land, they're rezoning for so-called affordable housing.

**Development** is taking away natural habitat and farmland too quickly.

Drilling new wells because of all the growth we have, (…) will affect the groundwater. And (…) with all the growth, and how much that will all cost.

Fees and taxes are out of line compared to other communities.
Overall Quality of Life in County of Wellington

- An overwhelming majority of residents (96%) rate the quality of life in the County of Wellington as either ‘very good’ or ‘good’. Remarkably, more than two-fifths (42%) consider the quality of life to be ‘very good’.
- While the rating of the quality of life is positive across all demographic groups, it is relatively lower among Wellington North residents, with only 23% rating it as ‘very good’. In comparison, other townships have higher percentages, ranging from a minimum of 32% in Puslinch to a maximum of 52% in Guelph/Eramosa.

Base: All respondents (n=918)
Q2. How would you rate the overall quality of life in the County of Wellington today?

Note: base size is very small, interpret with caution.
Quality of Life in the County of Wellington

- The majority of residents in the County of Wellington report that their quality of life remained unchanged over the past three years. However, one-quarter (26%) of residents say that their quality of life has worsened.
- This decline was more prevalent among lower-income households (35% for those who earn less than $40K, compared to 26% and 21% for those who earn between $40k+), renters (35% versus 24% for homeowners), and in Wellington North and Puslinch compared to Minto and Mapleton.

Quality of Life in County of Wellington in Past 3 Years Has...

- Improved: 12%
- Stayed the same: 62%
- Worsened: 26%

<table>
<thead>
<tr>
<th>Location</th>
<th>Improved</th>
<th>The Same</th>
<th>Worsened</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twp of Mapleton</td>
<td>19%</td>
<td>69%</td>
<td>12%</td>
</tr>
<tr>
<td>Town of Erin</td>
<td>6%</td>
<td>66%</td>
<td>28%</td>
</tr>
<tr>
<td>Town of Minto</td>
<td>18%</td>
<td>65%</td>
<td>17%</td>
</tr>
<tr>
<td>Twp of Centre Wellington</td>
<td>10%</td>
<td>62%</td>
<td>25%</td>
</tr>
<tr>
<td>Twp of Guelph/Eramosa</td>
<td>15%</td>
<td>58%</td>
<td>26%</td>
</tr>
<tr>
<td>Twp of Puslinch</td>
<td>8%</td>
<td>57%</td>
<td>35%</td>
</tr>
<tr>
<td>Twp of Wellington North</td>
<td>8%</td>
<td>54%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Image Source: County of Wellington website (www.wellington.ca)
Base: All respondents (n=918); DK/NS : 1%
Q3. Do you feel that the quality of life in the County of Wellington in the past three years has ...
Living in the County of Wellington

An overwhelming majority of Wellington County residents express pride in their region, with 94% stating that they are proud to call it home, and almost all (96%) residents saying that the County is an excellent environment for raising a family. Eight in ten agree that Wellington County is a great place for retirees and seniors, however, men are more likely than women to consider the County a suitable place for retirement and senior living.

<table>
<thead>
<tr>
<th>Statement</th>
<th>% STRONGLY AGREE</th>
<th>% SOMEWHAT AGREE</th>
<th>% SOMEWHAT DISAGREE</th>
<th>% STRONGLY DISAGREE</th>
<th>Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is a great place to raise a family</td>
<td>67%</td>
<td>30%</td>
<td></td>
<td>96%</td>
<td>3% n/a</td>
</tr>
<tr>
<td>I am proud to live in the County of Wellington</td>
<td>63%</td>
<td>31%</td>
<td>5%</td>
<td>94%</td>
<td>5% 83%</td>
</tr>
<tr>
<td>Is a place where residents feel safe and secure</td>
<td>48%</td>
<td>46%</td>
<td>6%</td>
<td>93%</td>
<td>7% 79%</td>
</tr>
<tr>
<td>Is a great place for retirees and seniors to live</td>
<td>40%</td>
<td>44%</td>
<td>13%</td>
<td>83%</td>
<td>16% n/a</td>
</tr>
</tbody>
</table>

Note: not showing scores of 2% and under

More positive among affluent residents (95% in HH $120K+ vs <$39K 86%)

Women are less likely than men to think Wellington is a place for retirees and seniors

Strongly/Somewhat agree: men 89%, women 79%

Strongly/somewhat disagree: men 10%, women 21%

Base: All respondents (n=918)
Q15. To what extent do you agree or disagree with the following statements about life in the County of Wellington?
Note: not showing scores of 2% and under
Perceptions of Safety in the County of Wellington

- There is a strong sense of security among the residents as almost all (97%) consider the County safe. In fact, over half of the residents (53%) consider the County a very safe place.
- Those 55+ are less enthusiastic about the level of safety and less likely to rate the County ‘very safe’ (46%, vs 66% among 18-34 and 55% among 35-54).

COUNTY OF WELLINGTON IS...

<table>
<thead>
<tr>
<th>Very Safe</th>
<th>Somewhat Safe</th>
<th>Not Very Safe</th>
<th>Not At All Safe</th>
</tr>
</thead>
<tbody>
<tr>
<td>53%</td>
<td>44%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

% Very / Somewhat Safe

- 97% ▲

% Not Very / Not At All Safe

- 89%

- Benchmark: % Very / Somewhat Safe

- 89%

- % Not Very / Not At All Safe

- 3%

Base: All respondents (n=918)
Q18. Overall, how safe would you describe the County of Wellington as?
Note: not showing scores of 2% and under
Protecting the Environment in the County of Wellington

- Residents provide a positive rating of the County’s efforts to protect the environment as eight in ten (78%) indicate that they are ‘very’ or ‘somewhat satisfied’. This satisfaction is consistent across most demographic groups. However, residents of the Town of Erin express relatively higher levels of dissatisfaction compared to residents of other townships. They are significantly more likely, 2 to 4 times more often, to indicate being either “very dissatisfied” or “not at all satisfied” with how environmental protection is managed in their area.

**LEVEL OF SATISFACTION WITH COUNTY OF WELLINGTON PROTECTING ENVIRONMENT**

<table>
<thead>
<tr>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Not Very Satisfied</th>
<th>Not At All Satisfied</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>59%</td>
<td>16%</td>
<td>5%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**% Very / Somewhat Satisfied**

- **78%**

**Benchmark:**

- Twp of Mapleton 90%
- Town of Minto 87%
- Twp of Wellington North 81%
- Twp of Centre Wellington 80%
- Twp of Puslinch 77%
- Twp of Guelph/Eramosa 70%
- Town of Erin 65%

**% Not Very / Not At All Satisfied**

- **21%**

**Benchmark:**

- Town of Erin 33%
- Twp of Guelph/Eramosa 27%
- Twp of Puslinch 23%
- Twp of Wellington North 18%
- Twp of Centre Wellington 18%
- Town of Minto 13%
- Twp of Mapleton 9%

*Note: not showing scores of 2% and under*
SERVICES: IMPORTANCE AND SATISFACTION

Image Source: County of Wellington website (www.wellington.ca)
Satisfaction with Overall Quality of Services Provided

- 87% of the residents are satisfied with the quality of services provided by the County of Wellington. This satisfaction extends across most demographic groups and is on par with the Ipsos normative comparison from other municipalities across the County.

### Satisfaction with Overall Level & Quality of Services Provided

**Township/Town** | Satisfied (Very/Somewhat)
--- | ---
Twp of Centre Wellington | 91%
Town of Minto | 90%
Twp of Guelph/Eramosa | 90%
Twp of Wellington North | 86%
Twp of Mapleton | 85%
Twp of Puslinch | 80%
Town of Erin | 79%

**Benchmark:**

- **% VERY/SOMEWHA**T SATISFIED: 86%
- **NOT VERY / NOT AT ALL SATISFIED:** 13%
- **DON'T KNOW:** 70%

Base: All respondents (n=918)

Q7. How satisfied are you with each of the following services offered by the County of Wellington? If you don’t know enough about the service or you have not used the service recently, please indicate that you don’t know enough about the service to say.
Importance of Services Offered by County of Wellington (1 of 2)

- A significant majority of residents in Wellington County consider all services related to the management of growth, development, transportation, and social services to be important. Key among these services are land use and community planning (94%), county road and infrastructure (94%), and senior care services (93%).
- When compared to Ipsos municipal normative scores, Wellington County residents show relatively less emphasis on transportation planning, traffic management, affordable housing, road infrastructure, and growth management, although these are still rated high in importance.

**Table: Importance of Services**

<table>
<thead>
<tr>
<th>Service</th>
<th>% VERY IMPORTANT</th>
<th>% SOMEWHAT IMPORTANT</th>
<th>% NOT VERY IMPORTANT</th>
<th>% NOT AT ALL IMPORTANT</th>
<th>DON'T KNOW</th>
<th>BENCHMARK % VERY/SOMEWHAT IMPORTANT</th>
<th>% NOT VERY / NOT AT ALL IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEVELOPMENT AND GROWTH MANAGEMENT</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land Use and Community Planning</td>
<td>63%</td>
<td>31%</td>
<td>5%</td>
<td></td>
<td></td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Economic Development</td>
<td>44%</td>
<td>45%</td>
<td>8%</td>
<td></td>
<td></td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Attainable and Affordable Housing</td>
<td>65%</td>
<td>23%</td>
<td>12%</td>
<td></td>
<td></td>
<td>88%</td>
<td>12%</td>
</tr>
<tr>
<td>County Growth Management</td>
<td>52%</td>
<td>34%</td>
<td>15%</td>
<td></td>
<td></td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>County Transportation Planning</td>
<td>36%</td>
<td>45%</td>
<td>15%</td>
<td></td>
<td></td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td><strong>TRANSPORTATION</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>County Roads and Infrastructure</td>
<td>68%</td>
<td>26%</td>
<td>5%</td>
<td></td>
<td></td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>County Traffic Management</td>
<td>45%</td>
<td>41%</td>
<td>12%</td>
<td></td>
<td></td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Active Transportation</td>
<td>39%</td>
<td>41%</td>
<td>14%</td>
<td></td>
<td></td>
<td>80%</td>
<td>20%</td>
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<tr>
<td><strong>SOCIAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Care Services</td>
<td>63%</td>
<td>30%</td>
<td>5%</td>
<td></td>
<td></td>
<td>93%</td>
<td>7%</td>
</tr>
<tr>
<td>Social Services, including Ontario Works and Housing Services</td>
<td>44%</td>
<td>37%</td>
<td>14%</td>
<td>5%</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Child Care Services</td>
<td>41%</td>
<td>32%</td>
<td>15%</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Base: All respondents (n=918)

** Full statement: County Roads and infrastructure – Read: County roads differ from local municipal roads are the arterial roads used by all vehicles including trucks usually carrying high traffic volumes with higher posted speed limits, apart from provincial roads. Examples of county roads include HWY 124 and 109). Q6. Please indicate how important each of these services offered by the County of Wellington is to you:**
Importance of Services Offered by County of Wellington (2 of 2)

- Understandably, the residents of Wellington County hold emergencies and essential services, such as ambulance services, snow removal, waste management, emergency preparedness, and police services, in high regard. Communication is also considered important by 93% of the residents.
- Museums, while important to six in ten residents, receive a relatively lower importance score (63%), surpassing only parking enforcement (41%) in terms of priority.

### ESSENTIAL / EMERGENCY

<table>
<thead>
<tr>
<th>Service</th>
<th>% VERY IMPORTANT</th>
<th>% SOMEWHAT IMPORTANT</th>
<th>% NOT VERY IMPORTANT</th>
<th>% NOT AT ALL IMPORTANT</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulance Services</td>
<td>83%</td>
<td></td>
<td>16%</td>
<td></td>
<td></td>
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<tr>
<td>County Snow Removal and Winter</td>
<td></td>
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<tr>
<td>Maintenance</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Garbage, Compost and Recycling Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Preparedness</td>
<td>56%</td>
<td></td>
<td>36%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Police Services</td>
<td></td>
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</tbody>
</table>

### OTHER SERVICES

<table>
<thead>
<tr>
<th>Service</th>
<th>% VERY IMPORTANT</th>
<th>% SOMEWHAT IMPORTANT</th>
<th>% NOT VERY IMPORTANT</th>
<th>% NOT AT ALL IMPORTANT</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication with Residents</td>
<td></td>
<td></td>
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<tr>
<td>Trails and Forests</td>
<td></td>
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<td></td>
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<tr>
<td>Library Facilities and Programmes</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Museum facilities and Programming</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Parking Enforcement</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Base: All respondents (n=918)

** Full statement: County Roads and infrastructure – Read: (County roads differ from local municipal roads are the arterial roads used by all vehicles including trucks usually carrying high traffic volumes with higher posted speed limits, apart from provincial roads. Examples of county roads include HWY 124 and 109).

Q6. Please indicate how important each of these services offered by the County of Wellington is to you:

≤2% values are not labelled
Satisfaction With Services Offered by County of Wellington (1 of 2)

- While economic development is a prominent concern raised by residents, a significant proportion of residents (77%) express satisfaction with it in Wellington County. In fact, residents of Wellington County show more enthusiasm for the County's economic development compared to residents of other Canadian municipalities.
- However, the County faces challenges in maintaining affordable housing that meets residents’ expectations, resulting in only one-third (33%) of County residents expressing satisfaction.

### Development and Growth Management

<table>
<thead>
<tr>
<th>Service</th>
<th>% Very Satisfied</th>
<th>% Somewhat Satisfied</th>
<th>% Not Very Satisfied</th>
<th>% Not at All Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Development</td>
<td>15%</td>
<td>62%</td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td>County Transportation Planning</td>
<td>9%</td>
<td>54%</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Land use and Community Planning</td>
<td>8%</td>
<td>54%</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>County Growth Management</td>
<td>8%</td>
<td>52%</td>
<td>29%</td>
<td>11%</td>
</tr>
<tr>
<td>Attainable and Affordable Housing</td>
<td>6%</td>
<td>27%</td>
<td>40%</td>
<td>27%</td>
</tr>
</tbody>
</table>

### Transportation

<table>
<thead>
<tr>
<th>Service</th>
<th>% Very Satisfied</th>
<th>% Somewhat Satisfied</th>
<th>% Not Very Satisfied</th>
<th>% Not at All Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Transportation</td>
<td>21%</td>
<td>55%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td>County Roads and Infrastructure</td>
<td>19%</td>
<td>56%</td>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>County Traffic Management</td>
<td>12%</td>
<td>52%</td>
<td>27%</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Social

<table>
<thead>
<tr>
<th>Service</th>
<th>% Very Satisfied</th>
<th>% Somewhat Satisfied</th>
<th>% Not Very Satisfied</th>
<th>% Not at All Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Care Services</td>
<td>16%</td>
<td>55%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Social Services</td>
<td>11%</td>
<td>57%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Senior Care Services</td>
<td>16%</td>
<td>49%</td>
<td>28%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: All respondents (n=918)
Q7. How satisfied are you with each of the following services offered by the County of Wellington? If you don’t know enough about the service or you have not used the service recently, please indicate that you don’t know enough about the service to say.
Residents express high levels of satisfaction with essential services such as ambulance services, snow removal, police services, emergency preparedness, and waste management. Satisfaction with snow removal and emergency preparedness surpasses municipal benchmarks. Improvement potential exists in waste management compared to other municipalities.

Residents are also satisfied with libraries and trail and forest amenities, but satisfaction with museums is lower. Communication with residents has a 68% satisfaction rate, with room for improvement compared to other municipalities.

<table>
<thead>
<tr>
<th>Service</th>
<th>% Very Satisfied</th>
<th>% Somewhat Satisfied</th>
<th>% Not Very Satisfied</th>
<th>% Not At All Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Essential / Emergency</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ambulance Services</td>
<td>47%</td>
<td>43%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>County Snow Removal and Winter Maintenance</td>
<td>46%</td>
<td>41%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Police Services</td>
<td>39%</td>
<td>48%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Emergency Preparedness</td>
<td>23%</td>
<td>64%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Garbage, Compost and Recycling Services</td>
<td>42%</td>
<td>41%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Other Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Facilities and Programmes</td>
<td>52%</td>
<td>42%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Trails and Forests</td>
<td>33%</td>
<td>58%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Museum Facilities and Programming</td>
<td>32%</td>
<td>56%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Parking Enforcement</td>
<td>20%</td>
<td>55%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Communication with Residents</td>
<td>11%</td>
<td>57%</td>
<td>26%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: All respondents (n=918)
Q7. How satisfied are you with each of the following services offered by the County of Wellington? If you don’t know enough about the service or you have not used the service recently, please indicate that you don’t know enough about the service to say.
PERSPECTIVE ON GROWTH AND DEVELOPMENT

Image Source: County of Wellington website (www.wellington.ca)
Perceptions of the Future and Local Economy

- A large majority (90%) of residents are optimistic about the County's future, with nearly half (47%) fully endorsing this positive sentiment.
- Most (82%) agree that the local economy is thriving, and three in ten (28%) express a strong agreement with this viewpoint.

**The County of Wellington is a community with a bright future**

- **STRONGLY AGREE**: 90%
- **SOMewhat AGREE**: 47%
- **SOMewhat DISAGREE**: 9%
- **STRONGLY DISAGREE**: 4%
- **DON'T KNOW**: n/a

**The County of Wellington has a vibrant and healthy local economy**

- **STRONGLY AGREE**: 82%
- **SOMewhat AGREE**: 15%
- **SOMewhat DISAGREE**: 17%
- **STRONGLY DISAGREE**: 7%
- **DON'T KNOW**: 54%

**Benchmark:**

- % STRONGLY/ SOMEWHAT AGREE: 77%

---

Base: All respondents (n=918)
Q15. To what extent do you agree or disagree with the following statements about life in the County of Wellington?
Note: not showing scores of 2% and under
Growth and Development

- Most residents (75%) believe that growth and quality of life can coexist in the County. About two-thirds (65%) think the County manages growth and development well, and over half (56%) feel that the County does a good job informing its citizens.

- However, there are some who don't think it's possible to achieve a balance between growth and quality of life (25%). Similarly, one-third (32%) of the residents are not convinced that the County manages development and growth effectively. Communication seems to be an issue, as more than 40% of the residents feel that the County doesn't keep citizens well-informed about growth and development plans.

---

**The County of Wellington** does a good job managing the level of development and growth in our County.

- **STRONGLY AGREE** 9%
- **SOMewhat AGREE** 56%
- **SOMewhat DISAGREE** 23%
- **STRONGLY DISAGREE** 9%
- **DON'T KNOW**

**The County of Wellington** keeps citizens informed about how it plans to deal with growth.

- **STRONGLY AGREE** 7%
- **SOMewhat AGREE** 49%
- **SOMewhat DISAGREE** 32%
- **STRONGLY DISAGREE** 12%
- **DON'T KNOW**

**It is possible for the County of Wellington to grow while maintaining the quality of life we have come to enjoy.**

- **STRONGLY AGREE** 28%
- **SOMewhat AGREE** 47%
- **SOMewhat DISAGREE** 16%
- **STRONGLY DISAGREE** 9%
- **DON'T KNOW**

---

Town of Erin more likely to disagree: 55% vs. 36%

**Wellington Centre** 32% Wellington North and Puslinch, 23% Mapleton, 21% Guelph/Eramosa, 17% Minto.

**Moncton** more likely to disagree: 55% vs. 36%

**Wellington Centre** 32% Wellington North and Puslinch, 23% Mapleton, 21% Guelph/Eramosa, 17% Minto.

Between 31% (Town of Minto) and 56% (Town of Erin) disagree that the County of Wellington keeps citizens informed.

---

Town of Erin more likely to disagree: 43% vs. 26%

Wellington North, Wellington Centre and Puslinch, 21% Guelph/Eramosa, 13% Mapleton, 8% Minto.

---

**Note:** not showing scores of 2% and under, removed from chart.

---

**Benchmark:**

- **Wellington Centre:** 57%
- **Wellington North and Puslinch:** 53%
- **Guelph/Eramosa:** 52%
- **Mapleton:** 52%
COMMUNICATING WITH CITIZENS

Image Source: County of Wellington website (www.wellington.ca)
Wellington County Council

- Familiarity with the County of Wellington Council is widespread, with about two-thirds (67%) of residents indicating some level of familiarity. However, only a small proportion (5%) claim to be very familiar. Familiarity tends to increase with age, length of time living in the County, and homeownership.
- In contrast, three-quarters (76%) of residents approve of the Council’s performance. Approval rates also tend to increase with age, but they are not significantly influenced by tenure or homeownership. While there is a slight increase in approval rates with higher household income, it is worth noting that income does not have a direct impact on familiarity levels.

### Familiarity with County Council

- **Very familiar**: 5%
- **Somewhat familiar**: 25%
- **Only a little familiar**: 38%
- **Not at all familiar**: 33%

### Approval of Overall Performance of County Council

- **Strongly approve**: 20%
- **Somewhat approve**: 6%
- **Strongly disapprove**: 6%
- **Somewhat disapprove**: 22%
- **Don’t know**: 70%

**Familiarity**:
- Age: 18-34 50%, 35-54 66%, 55+ 78%
- Tenure in the County <5 years 43%, 5-10 years 57%, 11+ years 72%
- Home ownership: own 70%, rent 54%

**Approval**:
- Age: 18-34 66%, 35-54 76%, 55+ 79%
- Income: $0-39K 70%, $40-119K 73%, $120 or more 81%

Base: Familiar with County of Wellington’s County Council (n=670)
Q5. Generally speaking, would you say you approve or disapprove of the overall performance of County of Wellington’s County Council?

Note: not showing scores of 2% and under
County of Wellington Communication

- Overall, a majority (58%) of residents believe that the County of Wellington communicates well with its citizens. This rating is consistent across various demographic groups.
- The rating of communication varies across different townships, with Puslinch and Erin showing the lowest levels of satisfaction overall.

### Communication with Citizens about Services, Programmes, Policies, and Plans

- **% Very Good / Good**: 58%
- **% Poor / Very Poor**: 41%
- **Very Good / Good Benchmark**: 72%

**Rating across townships**

<table>
<thead>
<tr>
<th>Township</th>
<th>Very Good / Good</th>
<th>Very Poor / Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twp of Wellington North</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>Town of Minto</td>
<td>NH (n=59)</td>
<td>66%</td>
</tr>
<tr>
<td>Twp of Centre Wellington</td>
<td>NH (n=432)</td>
<td>63%</td>
</tr>
<tr>
<td>Twp of Mapleton</td>
<td>NH (n=54)</td>
<td>58%</td>
</tr>
<tr>
<td>Twp of Guelph/Eramosa</td>
<td>NH (n=96)</td>
<td>57%</td>
</tr>
<tr>
<td>Twp of Puslinch</td>
<td>NH (n=82)</td>
<td><strong>47%</strong></td>
</tr>
<tr>
<td>Town of Erin</td>
<td>NH (n=100)</td>
<td>41%</td>
</tr>
</tbody>
</table>

Base: All respondents (n=918)

Q11. Overall, how would you rate the County of Wellington in terms of how well it communicates with citizens about its services, programmes, policies, and plans? Would you say the communication has been?

Note: not showing scores of 2% and under
Six out of every ten residents (60%) have accessed the website in the past year. Though website usage is consistent across townships, it is higher among women and older citizens (35+ year old), the more affluent (homeowners or high household income of $120K or more), and recent residents who moved to the County less than 5 years ago.

Unsurprisingly, accessing the website is likely to positively influence residents’ familiarity with the Council’s work and how taxes are utilized. However, website access does not necessarily impact the ratings of Council performance.

A significant majority (88%) find the website useful, and this sentiment remains consistent across various demographics, including across the townships.
Best Methods For Communicating Information

- Email emerges as the preferred method of communication for nearly half of the residents, regardless of demographics. Still, its preference is highest among those under the age of 35 (vs 35+).
- A substantial proportion (38%) express a preference for regular mail, which is consistent across all demographic groups.
- Newspapers (25%) and newsletters (21%) represent niche channels, predominantly favoured by individuals aged 55 and above. On the other hand, social media gains prominence among those under 35, preferred by one-quarter of them.

**Mentions**

- Email: 48%
- Mail: 38%
- Social Media (Twitter, Facebook, etc.): 19%
- Newspaper: 18%
- Newsletter/Pamphlet/Flyer/Brochure: 16%
- County Website: 13%
- Local/Regional Media: 5%
- Radio: 4%
- Text/Texting: 4%
- County meetings including Council meetings: 3%
- Telephone: 3%

**Benchmark**

- Email: 42%
- Mail: 25%
- Social Media (Twitter, Facebook, etc.): 17%
- Newspaper: 16%
- Newsletter/Pamphlet/Flyer/Brochure: 12%
- County Website: 15%
- Local/Regional Media: n/a
- Radio: 4%
- Text/Texting: 4%
- County meetings including Council meetings: 2%
- Telephone: 6%

**Notes**

- Emails - I do not always read the local papers or go on the website.
- More letters by mail, letters to opt in for email communication.
- Email, Wellington advertiser/local newspaper.
- Email newsletters to each taxpayer, include information in quarterly property tax bill.
- Email newsletter, paper communications are bad for the environment and costly.
- Email, insert in my tax bill.
- Monthly newsletter in the mail, Social media Facebook page.
- The ability to view through web cam meeting’s so residents can be informed without having to be there physically.
SPENDING AND TAXATION
Knowledge About County of Wellington Municipal Tax Spending

- More than half of Wellington residents admit to not being knowledgeable about municipal tax spending. Specifically, women, individuals under the age of 34, renters, and those residing in households earning less than $120K annually are more inclined than their counterparts to acknowledge their lack of understanding regarding how the municipality allocates the tax funds they collect.

## Demo Details of those who do not consider themselves knowledgeable about the tax spending:

- **Gender:** women 61% vs men 48%
- **Age:** 18-34 (74% vs 50% and 46% among 35-54 and 55+ respectively)
- **Tenure:** new to County (under 5 years) (67% vs 61% and 51% those who live in county 5-10 years or 11+ years respectively).
Preferred Approach to Mitigate the Increasing Cost of Services

- Wellington residents show little enthusiasm for a reduction in services to reduce taxes, with only 16% prioritizing tax reduction even if it leads to service cuts.
- To address municipal budget requirements, however, over half of the residents (56%) would prefer the County to raise taxes, while a significant proportion (40%) would opt for cuts in the level of service.
- Among those in favour of a tax increase, the majority (35%) would accept it primarily to prevent the loss of services, while a smaller proportion (22%) would consider a tax increase to expand services. Conversely, one-quarter (24%) would consider service cuts to maintain current tax levels.

**BASE: All respondents (n=918)**

Q9. Municipal property taxes are the primary way to pay for services provided by the County of Wellington. Due to the increased cost of maintaining current service levels and infrastructure, the County of Wellington must balance taxation and service delivery levels. To deal with this situation, which one of the following four options would you most like the County of Wellington to pursue?

- **INCREASE TAXES**
  - To enhance or expand services: 35%
  - To maintain services at current levels: 24%

- **CUT SERVICES**
  - To maintain current tax level: 22%
  - To reduce taxes: 16%

**INCREASE TAXES (NET): 56%**

**CUT SERVICES (NET): 40%**

**BENCHMARK**

- **INCREASE TAXES**
  - To enhance or expand services: 19%
  - To maintain services at current levels: 31%

- **CUT SERVICES**
  - To maintain current tax level: 24%
  - To reduce taxes: 14%

**Demo Details:**

- No children: 40% vs 25%
- Households with income $120K+: 32% vs 21% and 13% $40K-$119K, and under $40K respectively.
- Homeowners: 26% vs renters 14%
- With children: 30% vs 21%
- Younger than 55: 23% and 18% for those 18-34 and those 35-54 respectively vs 11%, ages 55+.
- Renters: 29% vs homeowners 14%

Note: None 3%, DK 1%
Property Taxes vs. User Fees

- However, if residents were faced with a choice between increasing property taxes or user fees, the overwhelming majority (78%) would opt for a fee increase.

### TO ENSURE REVENUE FOR EXPECTED LEVELS OF SERVICES AND PROGRAMMES...

<table>
<thead>
<tr>
<th>Would prefer increased user fees</th>
<th>Would prefer increased property taxes</th>
</tr>
</thead>
<tbody>
<tr>
<td>$78%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Demo Details:**
- Gender: women 82% vs 78% men
- Homeowners: 83% vs 55% renters
- Puslinch (89%) and Erin (88%)

**Demo Details:**
- Renters: 32% vs 15% homeowners
- Wellington North (27%) and to some extent Centre Wellington (21%)

Benchmark: n/a

Base: All respondents (n=918)
Q10. To ensure enough revenue to pay for expected levels of services and programmes, would your preference be for increasing property taxes or increasing user fees?
APPENDIX: DEMOGRAPHIC DESCRIPTION OF THE SAMPLE
Demographics (1 of 2)

**GENDER IDENTITY**
- Woman: 50%
- Man: 48%
- Non-binary/gender fluid: 0%
- Two-spirit: 0%
- Other (Specify): 0%
- Prefer not to answer: 2%

**AGE**
- 18 to 34: 24%
- 35 to 54: 31%
- 55+: 45%
- Average: 50.3

**YEARS LIVED IN WELLINGTON**
- <5 years: 11%
- 5-10 years: 13%
- 11+ years: 76%
- Average: 25

**CHILDREN UNDER 18**
- Yes: 34%
- No: 66%
- n=20

**TOWNSHIP**
- Township of Centre Wellington: 32%
- Township of Guelph/Eramosa: 15%
- Township of Wellington North: 13%
- Town of Erin: 13%
- Township of Mapleton: 10%
- Town of Minto: 9%
- Township of Puslinch: 9%

**TENURE**
- Own: 83%
- Rent: 16%
Demographics (2 of 2)

**ETHNIC IDENTIFICATION**
- White (only): 91%
- Non-white (incl. mix): 7%

**BORN IN CANADA?**
- Yes: 89%
- No: 11%
- Prefer not to answer: 1%

**INDIGENOUS IDENTIFICATION (FIRST NATIONS, INUIT OR METIS)**
- No: 95%
- Yes: 1%
- Prefer not to answer: 3%

**HOUSEHOLD INCOME**
Mean: $107.8K
Median: $79.6K
- Less than $20K: 3%
- $20K to just under $40K: 6%
- $40K to just under $80K: 22%
- $80K to just under $120K: 24%
- $120K to just under $160K: 14%
- More than $160K: 16%
- Prefer not to say: 14%
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