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2020 Residential Satisfaction Study



Report of Findings

February 14, 2020

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Harnessing the power of data to help clients achieve organizational goals.

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Solutions that are customized to provide a personalized approach of understanding organizational, employee, and customer needs allowing for more informed decisions.



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Project Overview

- GreatBlue Research was commissioned by the Town of New Canaan, CT (hereinafter, “New Canaan” or “the town”) to conduct comprehensive research among its residents to gather feedback regarding town programs, services and priorities.
- The primary goals of this research study were to investigate primary reasons for living in New Canaan, gather current perceptions of the town, and gain insight into residents’ desired priorities for town spending.
- In order to service these research goals, GreatBlue employed both telephone and digital methodologies to conduct surveys among a random sampling of New Canaan residents.
- The outcome of this research will enable the Town of New Canaan leaders to a) clearly understand the key drivers for residency, b) uncover residents’ current perceptions of the town and, c) identify priorities for town spending that align with residents’ preferences.

Areas of Investigation

The Town of New Canaan Residential Satisfaction Study leveraged a quantitative research methodology to address the following areas of investigation:

- Reasons for living in New Canaan
- Current perceptions of the town compared with expectations
- Perceived value of living in New Canaan for taxes paid and services received
- Residents' preferred priorities for town spending
- Barriers to living in New Canaan
- Likelihood to recommend New Canaan as a place to live
- Perceptions of New Canaan's taxes compared with neighboring towns

Research Methodology Snapshot

Methodology Telephone & Online	No. of Completes 2,151 <small>(403 phone + 1,748 online)</small>	No. of Questions 36*	Time Compensation None	Sample Resident list provided by Town of New Canaan
Target New Canaan Residents	Quality Assurance Dual-level**	Margin of Error +/- 1.9%	Confidence Level 95%	Research Dates January 7-28

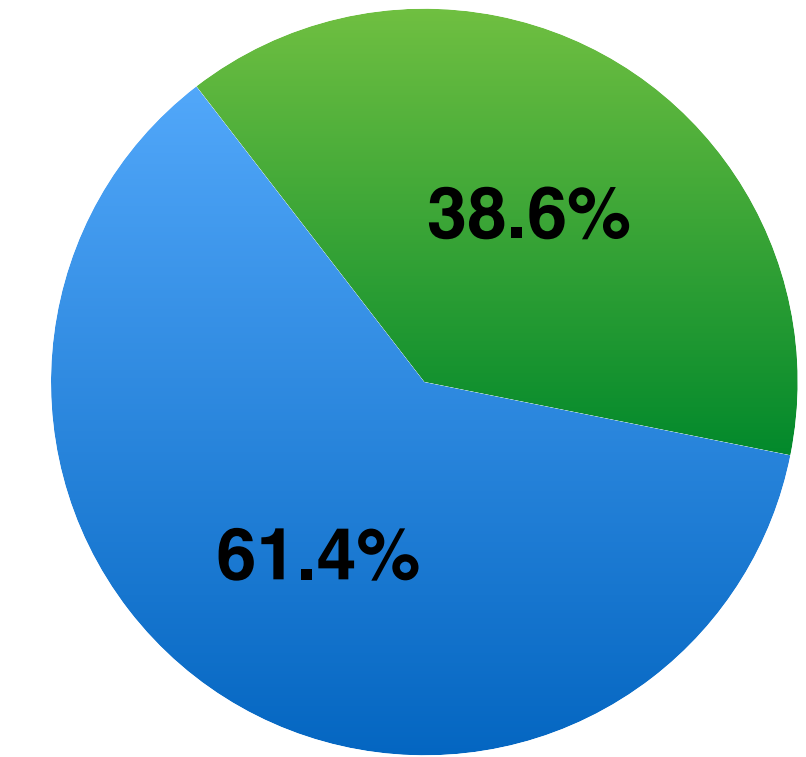
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Respondent Snapshot

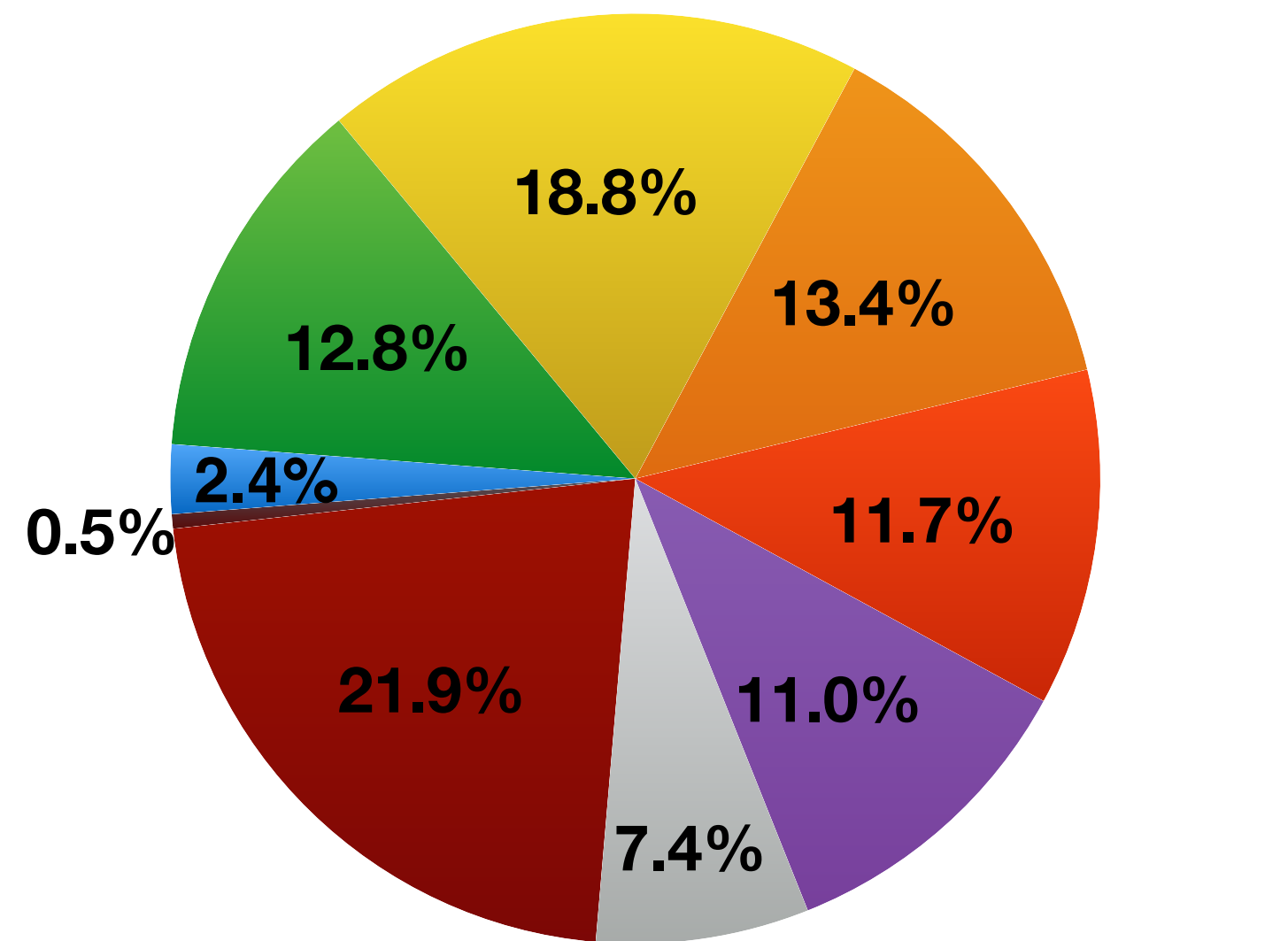
This slide quantifies select data points to provide context for this research study. The data is not meant to be statistically significant, rather to provide an empirical view into the demographic profile of the survey respondents.

Gender



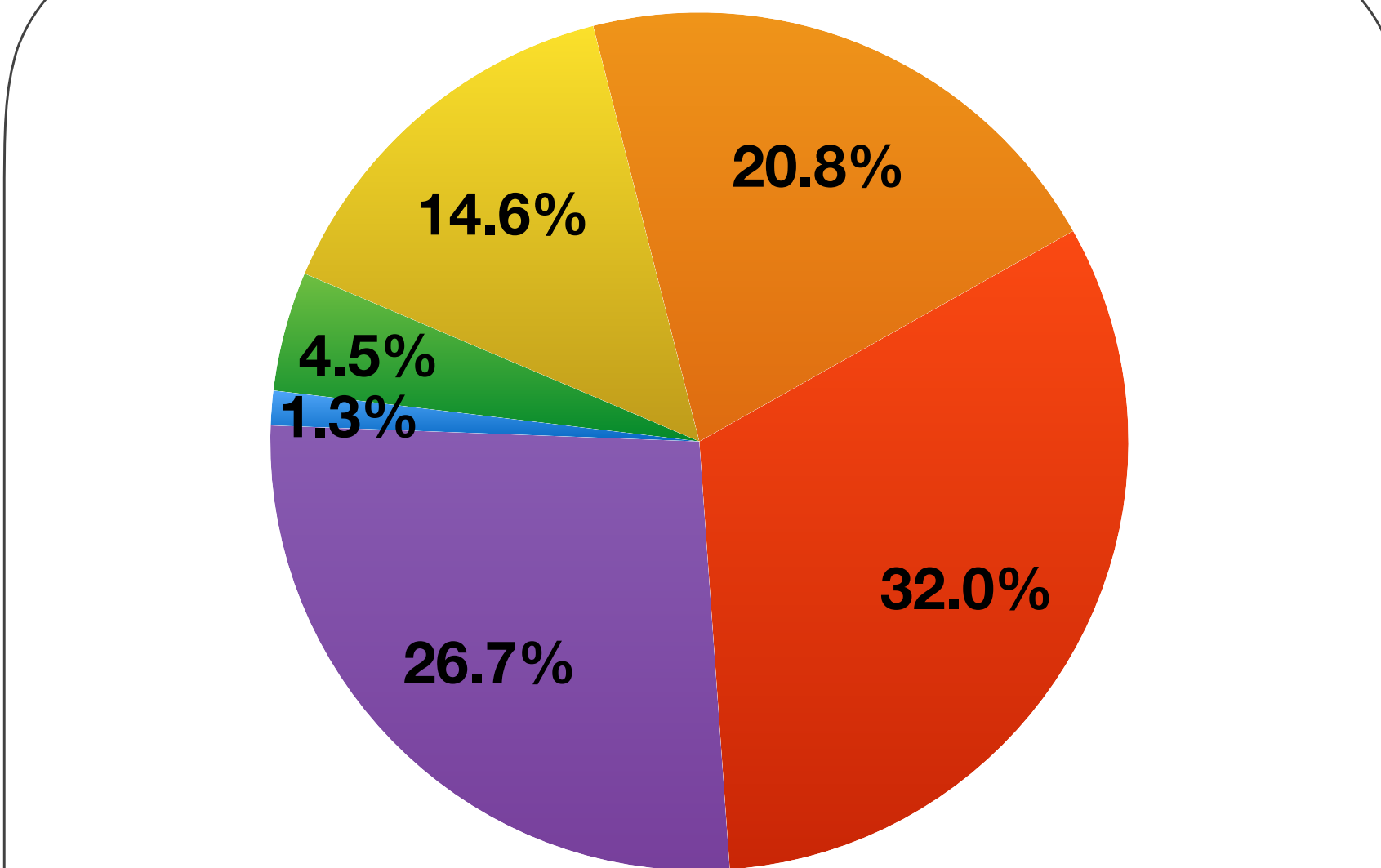
● Female ● Male

Length of time living in New Canaan



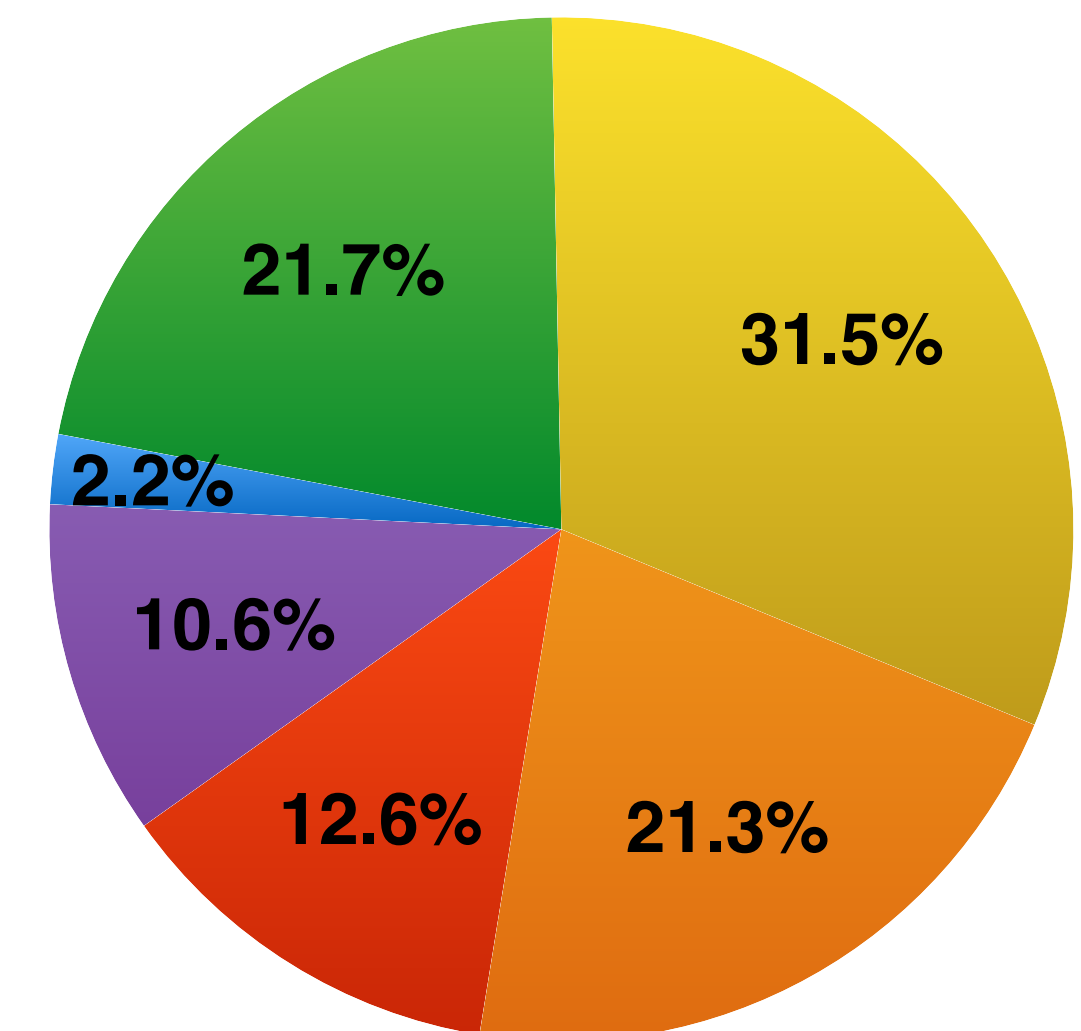
● Less than 1 year ● 1 to less than 5 years
 ● 5 to less than 10 years ● 10 to less than 15 years
 ● 15 to less than 20 years ● 20 to less than 25 years
 ● 25 to less than 30 years ● 30 years or more
 ● Refused/Prefer not to reply

Income



● Under \$50,000 ● \$50,000 to less than \$100,000
 ● \$100,000 to less than \$200,000 ● \$200,000 to less than \$400,000
 ● \$400,000 or more ● Refused/Prefer not to reply

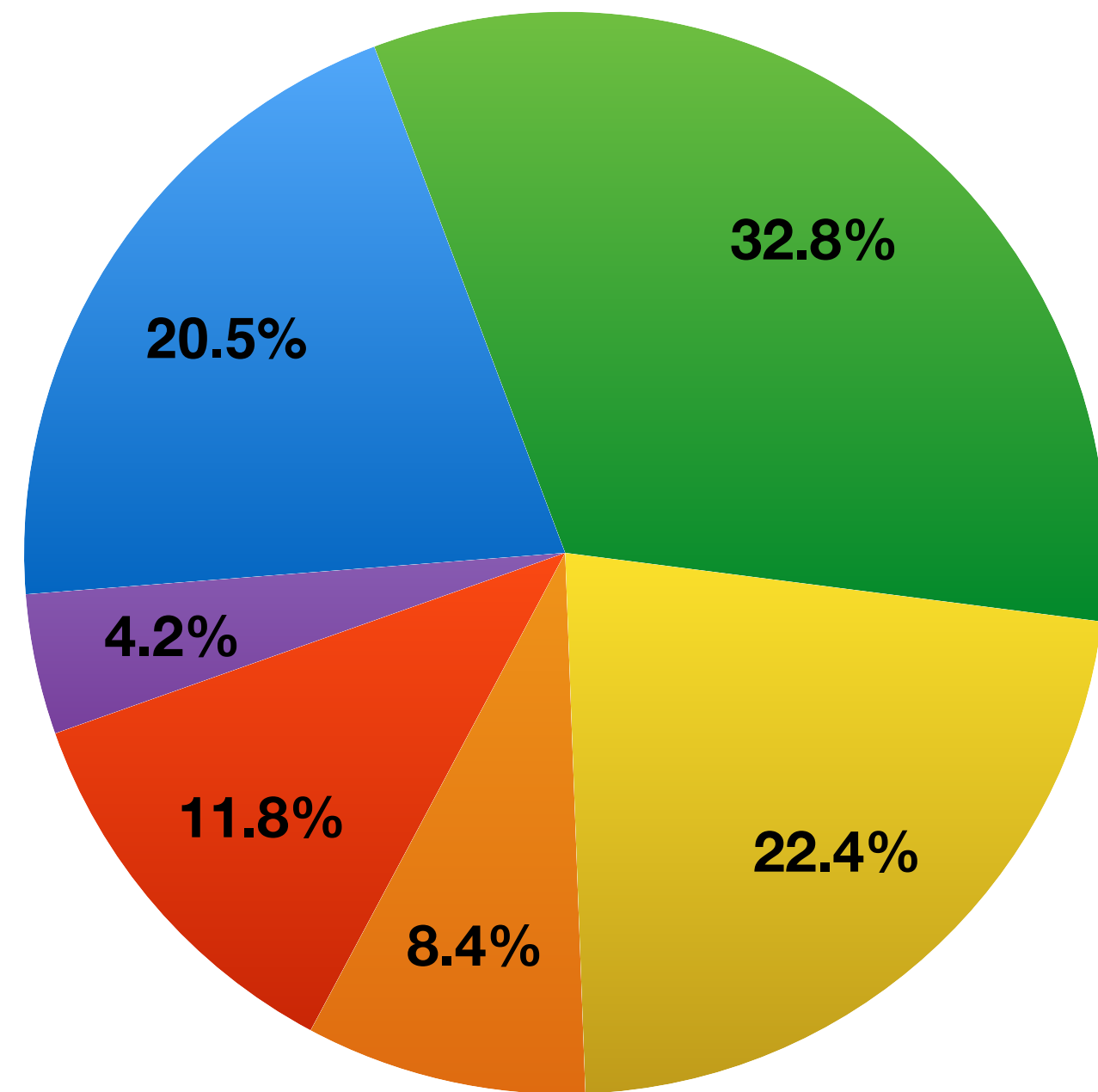
Age



● 25 to 34 ● 35 to 44 ● 45 to 54
 ● 55 to 64 ● 65 to 74 ● 75 or older

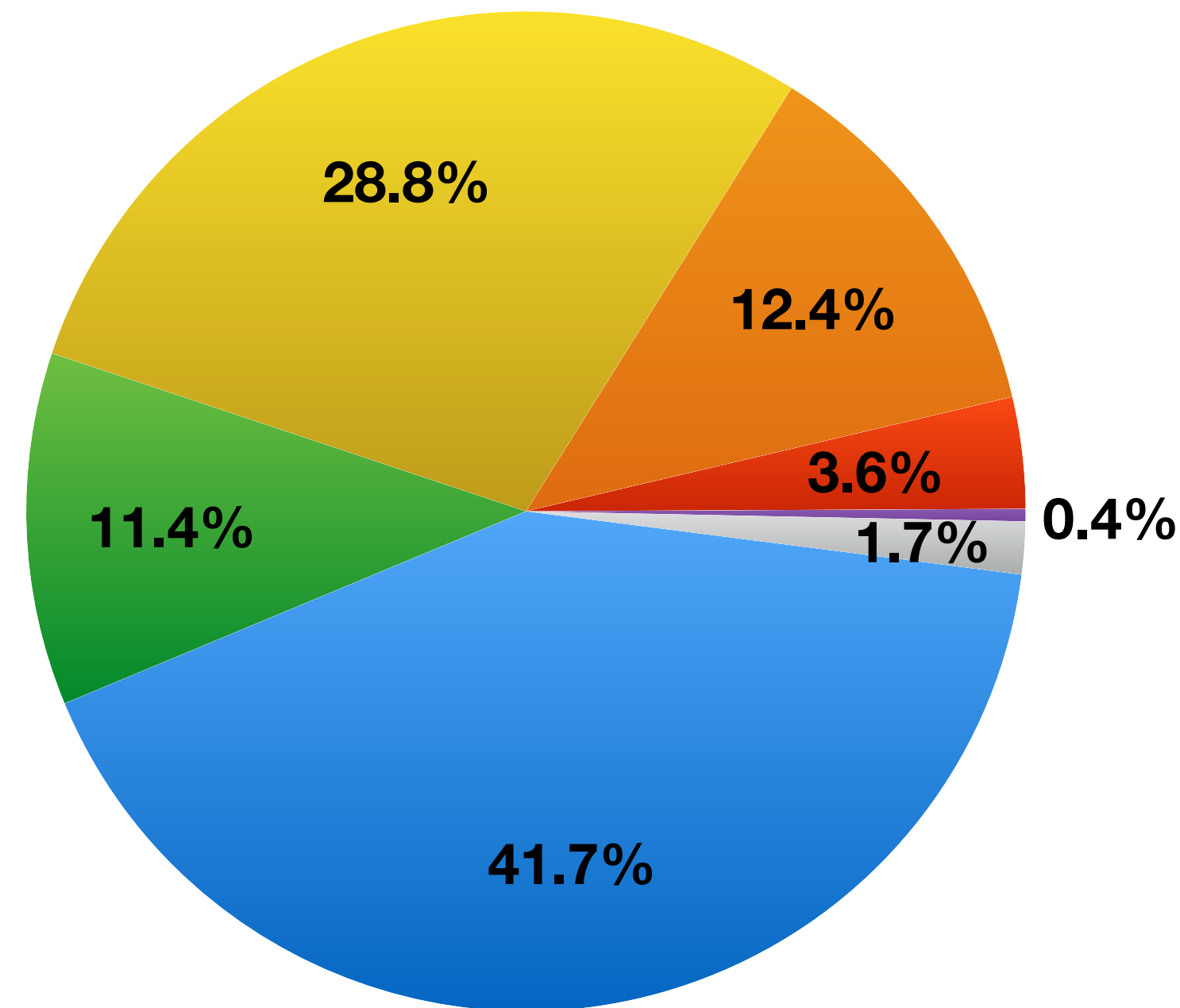
Respondent Snapshot, continued

Expect to live in New Canaan...



- More than 1 year from now
- More than 10 years from now
- More than 20 years from now
- More than 5 years from now
- More than 15 years from now
- N/A-Will not be living in New Canaan 1 year from now

Number of children under age 19



- None
- 1
- 2
- 3
- 4
- 5 or more
- Refused/prefer not to reply

Children's current school

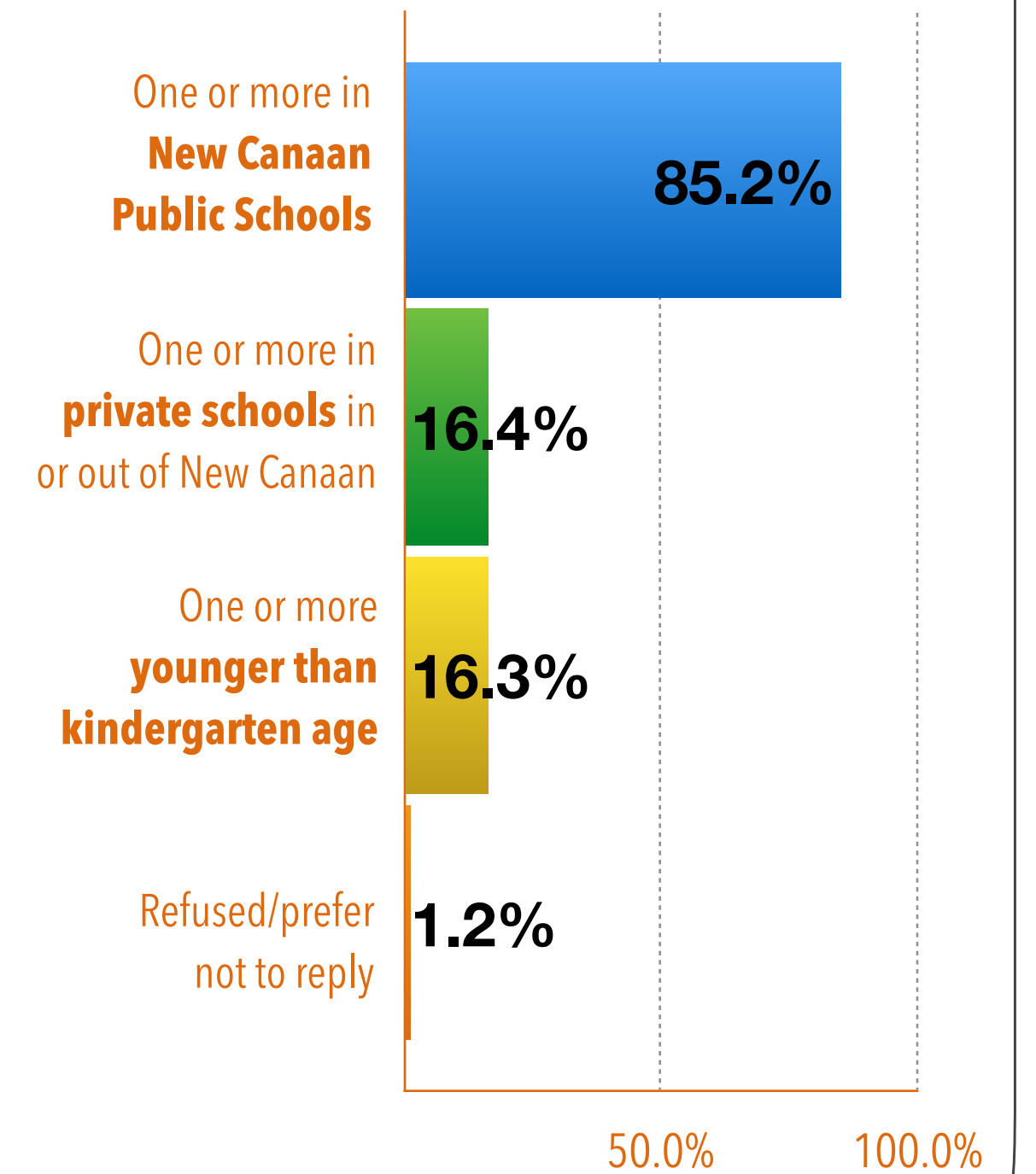


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71.5%

would still purchase
at an increased
price point

8.9%

5.4%

2.8%

0.0%

Negative Impact

Boomers

Key Study Findings

- Over two-thirds of respondents, 71.3%, reported they “strongly” (22.3%) or “somewhat” (50.8%) agree with the statement: *“Living in New Canaan is a good value for the taxes I pay and the services I receive.”*
- The majority of surveyed residents (89.5%) reported being “very” or “somewhat” likely to recommend New Canaan as a place to live.
- Of all the reasons given, the highest frequency of respondents reported “quality of schools” (49.0%) was the overall primary reason they chose to live in New Canaan.
 - Of all the reasons given, the highest frequency of surveyed residents also reported “quality of schools” (37.0%) was the overall primary reason they decided to continue living in New Canaan.
 - Of note, the highest frequency of respondents age 55 and older (20.3%) reported they continue living in New Canaan for the “family friendliness/strength of the community.”
- Over three-quarters of surveyed residents (78.1%) reported their current perception of New Canaan either “meets” (52.3%) or “exceeds” (25.8%) the expectations they had prior to moving to the town. Less than one in five respondents (18.5%) reported New Canaan “falls short of expectations.”
- “Affordability of living” (45.9%), “state income taxes” (43.5%), and “state taxes” (42.2%) were reported by the highest frequency of surveyed residents as reasons that would cause them to move from New Canaan to another town or state.
- “Taxes/property taxes” (14.4%) topped the list of changes respondents suggested for the town, followed by “improve train service (more frequent, faster, etc.)” (10.6%), and a desire for New Canaan to be “more diverse (people, events, etc.)” (5.2%).

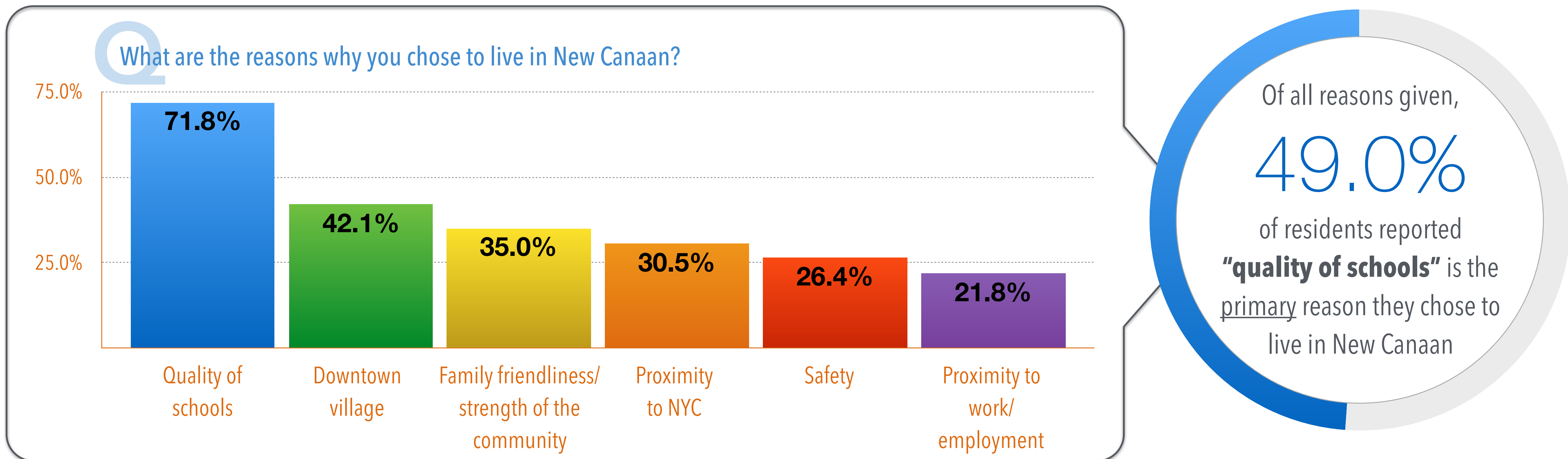
Key Study Findings, continued

- Over one-fifth of respondents (21.5%) suggested that New Canaan “improve/maintain train service (more trains, shorten commute, etc.) in order to attract new residents to the town.
- The majority of surveyed residents reported they believe New Canaan’s taxes are “about the same” as Darien’s (69.5%) and Westport’s (60.5%).
 - Over one-third of surveyed residents reported they believe New Canaan’s taxes are “higher” than those of Greenwich (37.0%) and Wilton (34.2%).
 - Three out of four respondents (75.2%) reported they believe New Canaan’s taxes are “lower” than taxes in Westchester County.
- While most respondents reportedly believe New Canaan should “retain the level of spending” for all areas reviewed, over one-quarter indicated New Canaan should “increase” spending now or in the near future for the “library annual operating budget” (29.0%), “public works (road maintenance, snow plowing, sidewalks, etc.)” (28.2%), and “schools” (27.9%).
 - The areas for which the highest frequency of respondents reported New Canaan should “decrease” spending now or in the near future are “open space” (21.3%) and “human services” (17.9%).
 - More than seven out of ten surveyed residents reported they believe New Canaan should “retain the level of spending” for “public safety (Police, Fire, Ambulance)” (77.8%), “parks and recreation/Lapham Community Center” (73.8%), and for “human services” (71.0%).

Quality of Schools Draws Residents to New Canaan

The highest frequency of surveyed residents (71.8%) reported “quality of schools” is one of the primary reasons they chose to live in New Canaan, followed by “downtown village” (42.1%) and “family friendliness/strength of the community” (35.0%). “Quality of schools” was also reported by the highest frequency of respondents (49.0%) as the overall primary reason they chose to live in New Canaan.

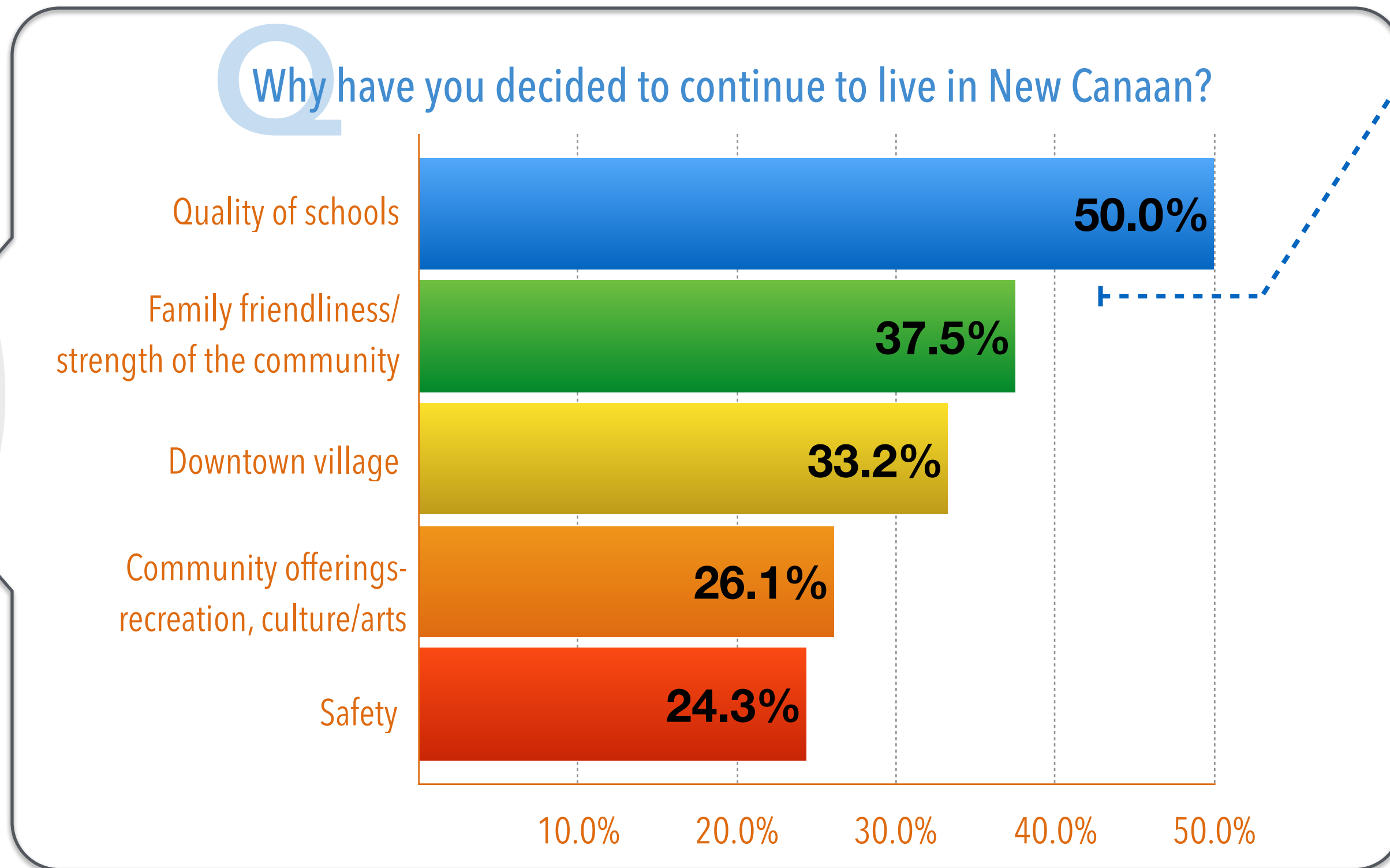
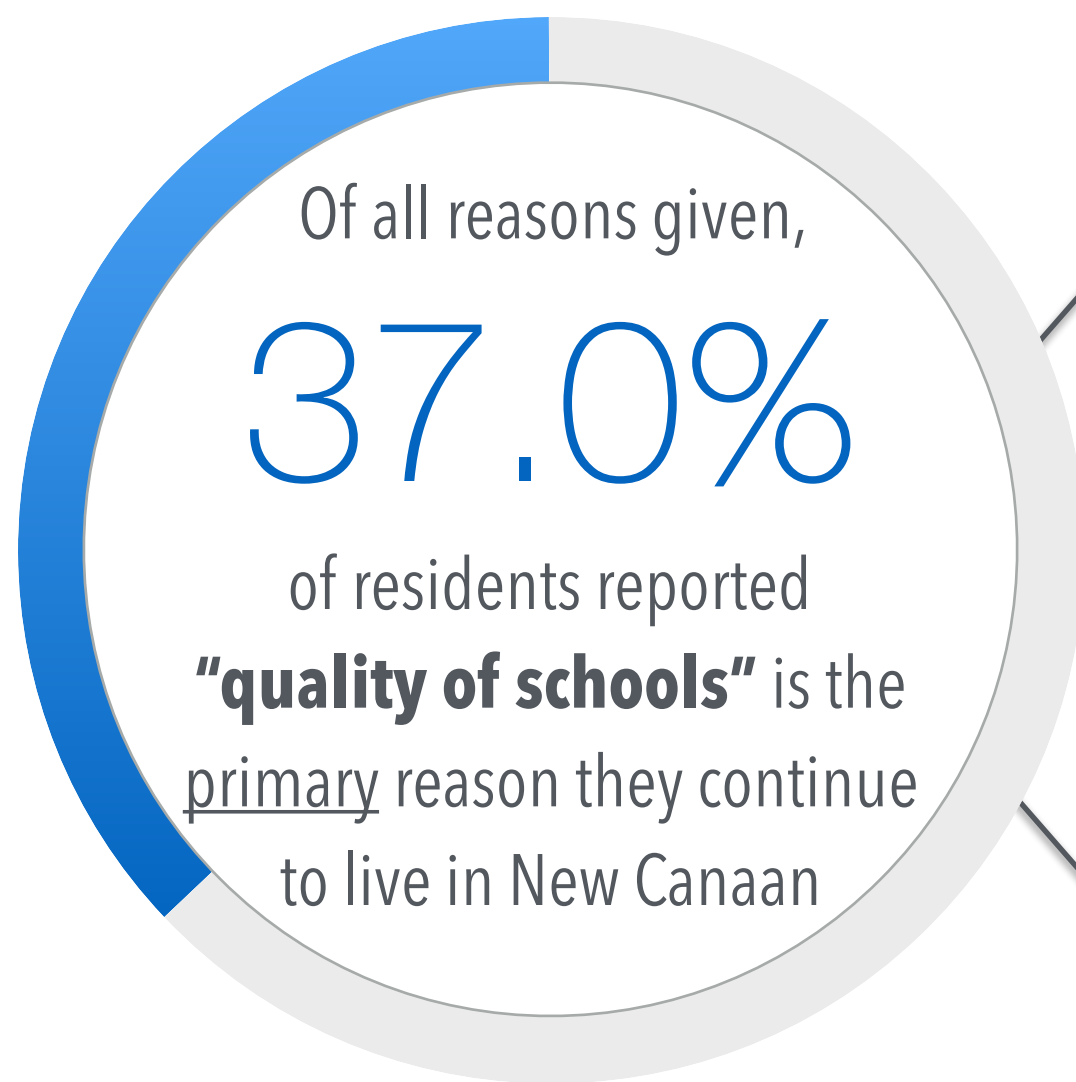
Additionally, a high frequency of residents surveyed who have lived in the town for “less than one (1) year” (71.2%) reported “quality of schools” as the primary reason they chose to live in New Canaan.



Schools Drive Residents to Stay in New Canaan

Consistent with the top three (3) reasons for choosing to live in New Canaan, the highest frequency of surveyed residents reported “quality of schools” (50.0%), “family friendliness/strength of the community” (37.5%), and “downtown village” (33.2%) were reasons they decided to continue to live in New Canaan. Further, over one-third of residents (37.0%) reported “quality of schools” as the overall primary reason they continue to live in the town.

The highest rates of respondents ages 55-64 (18.1%), 65-74 (18.1%), and 75 or older (27.5%) reported “family friendliness/strength of the community” is the primary reason they continue to live in New Canaan.



Please provide an example as to how “family friendliness/strength of the community” has contributed to your desire to continue living in New Canaan... (N=807)

- #1 **“Community support/strength of community (welcoming, caring, helpful, well-being, emotional connection, etc.)”** (28.5%)
- #2 “Friendships/strong connections” (23.4%)
- #3 “Friendly people/neighbors” (10.3%)
- #4 “Community offerings-recreation, amenities, restaurants, services, business, parks, library” (9.7%)
- #5 “Club/group/organization opportunities” (9.4%)
- #6 “Town events/traditions (seasonal, holidays, parades, fireworks, etc.)” (8.7%)

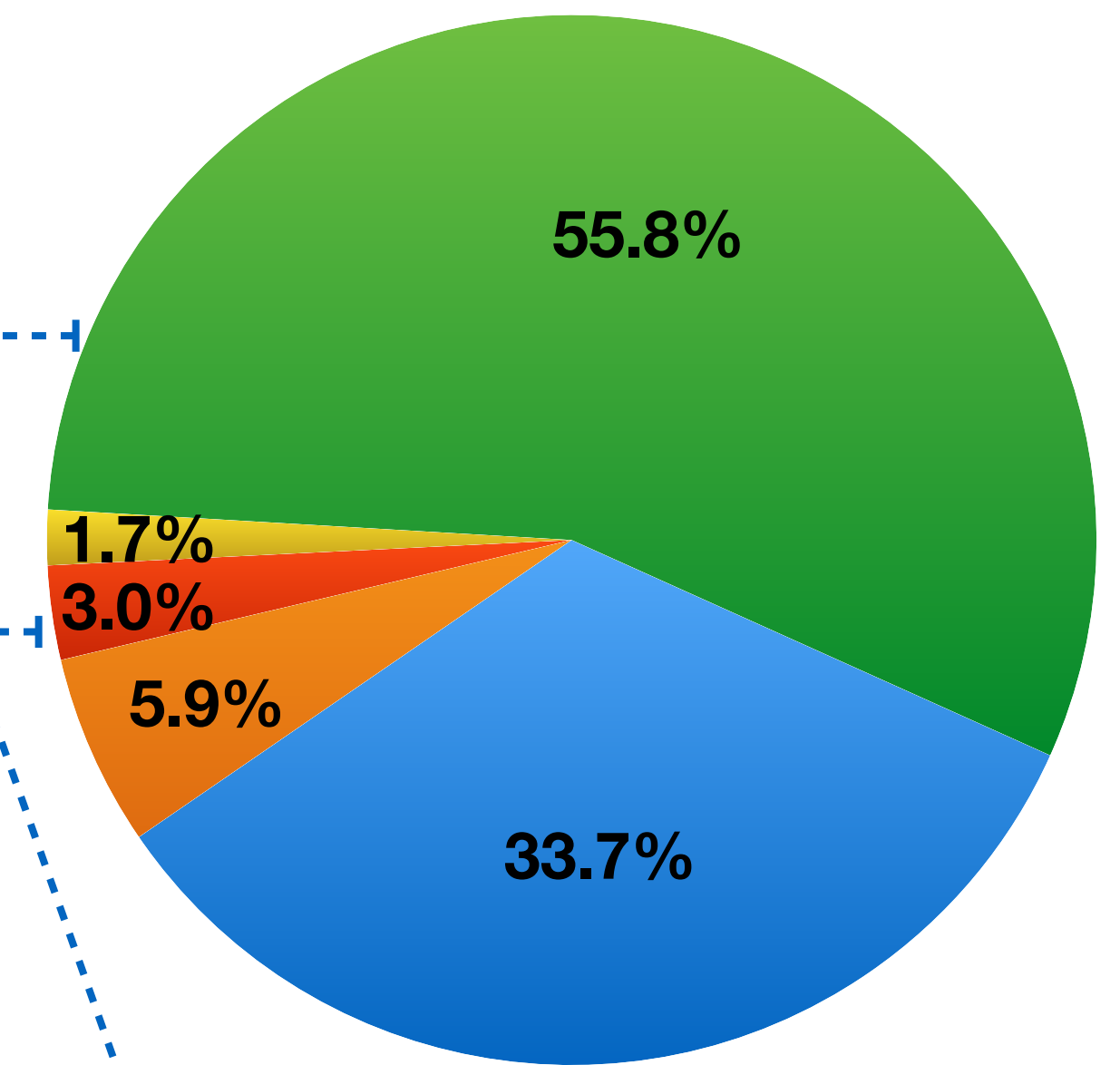
Likely to Recommend Living in New Canaan

Over two-thirds of respondents (89.5%) reported being “likely” (“very” or “somewhat”) to recommend New Canaan as a place to live. A low frequency of respondents (8.9%) reported being “not likely” (“somewhat” or “not at all”).

Of note, a higher frequency of surveyed residents who have lived in New Canaan for 15 to less than 25 years (13.3%) reported they are “not likely” to recommend New Canaan as a place to live compared to respondents with less than five years of residency (3.6%).

Q How likely would you be to recommend New Canaan as a place to live?

- Very likely
- Somewhat likely
- Somewhat unlikely
- Not at all likely
- Don't know/unsure



Q Please explain why you are “very likely?” (N=1201)

- #1 “Quality of schools/education” (36.2%)
- #2 “Family friendly/great place to raise family” (20.9%)
- #3 “Great place to live/love living here/positive experience/already recommend” (20.8%)

Q Please explain why you are “not at all likely?” (N=63)

- #1 “High taxes” (27.0%)
- #2 “Fiscally irresponsible/poor management” (22.2%)
- #3 “Declining property values” (17.5%)

New Canaan Meets Expectations

One-quarter of surveyed residents (25.8%) reported their current perception of New Canaan “exceeds” the expectations they had prior to moving to the town, and another 52.3% reported their current perception of the town “meets expectations.”

Notably, the frequency of residents reporting New Canaan “exceeds expectations” is higher among those who have lived in the town for “one (1) to less than five (5) years” (38.8%) when compared to the frequency of those who have lived in the town for “25 to less than 30 years” (13.8% “exceeds”).

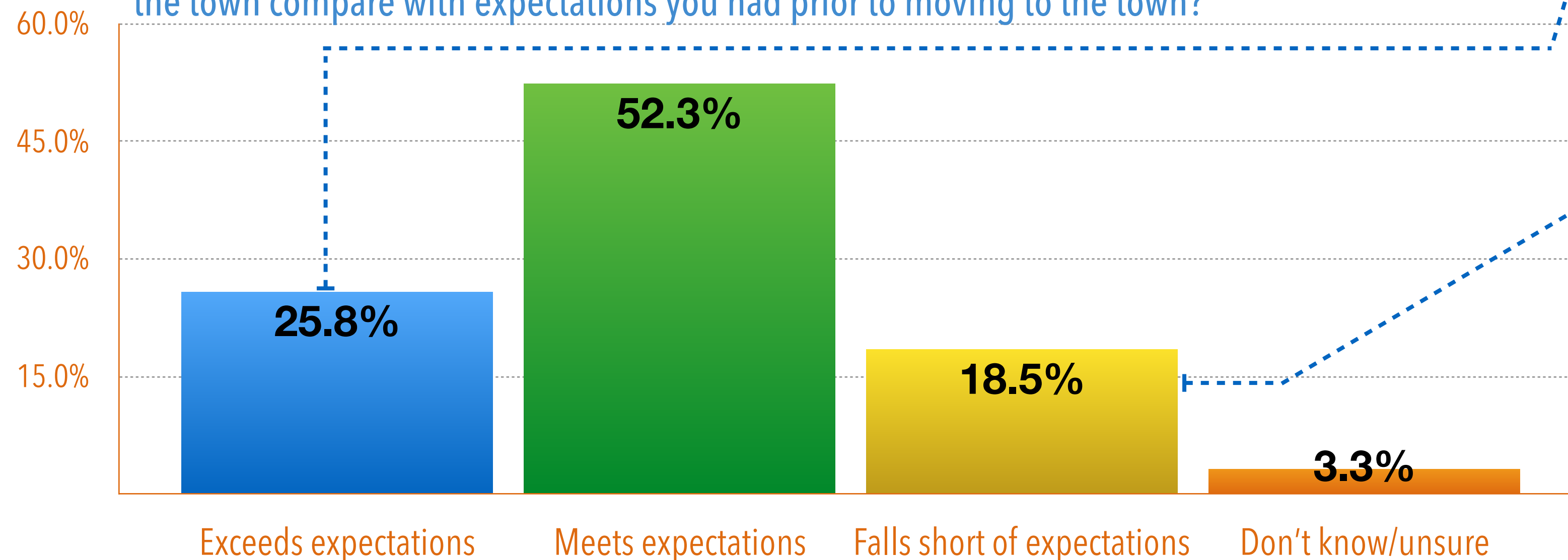
Q In what ways does your current perception “exceed expectations?” (N=556)

- #1 “Quality of schools/education” (29.5%)
- #2 “Community support/strength of the community” (28.2%)
- #3 “Residents/neighbors (friendly, talented, etc.)” (18.9%)
- #4 “Community offerings-recreation, amenities, restaurants, services, library” (16.2%)
- #5 “Town itself (small town feel, beautiful, quiet, clean, etc.)” (11.0%)

Q In what ways does your current perception “fall short of expectations?” (N=399)

- #1 “High taxes/mill rate” (26.6%)
- #2 “Real estate/property value decline” (18.8%)
- #3 “Loss of business, retail, restaurants” (12.8%)
- #4 “Decrease in education/low budget/schools in disrepair” (12.3%)
- #5 “Poor town management/fiscal responsibility” (12.0%)

Q Now, as a resident of New Canaan, how does your current perception of the town compare with expectations you had prior to moving to the town?

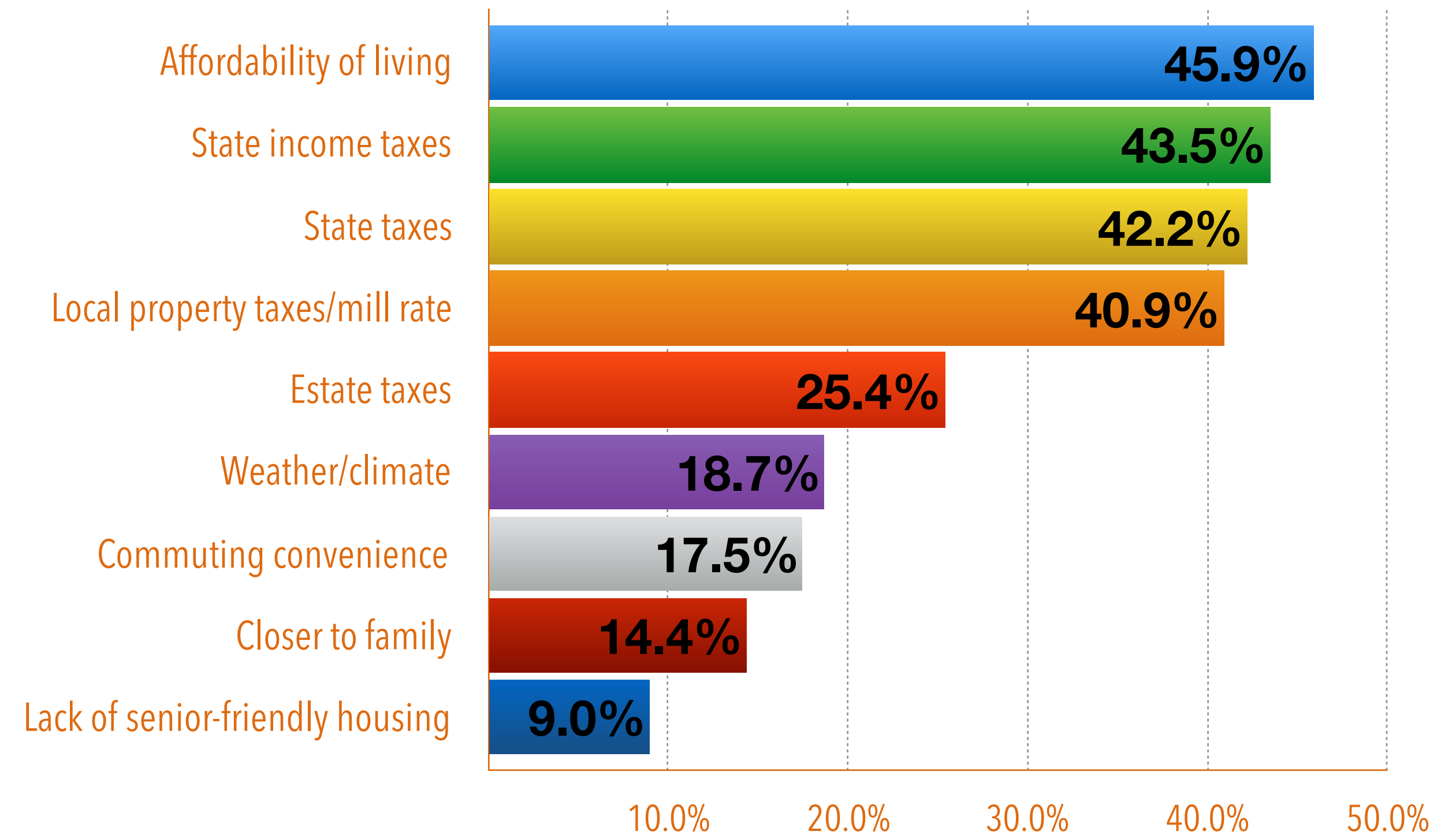


Affordability of Living/ Taxes Would Cause Residents to Move

The highest frequency of surveyed residents reported “affordability of living” (45.9%) would cause them to move from New Canaan to another town or state, followed by “state income taxes” (43.5%), “state taxes” (42.2%), and “local property taxes/mill rate” (40.9%).

Top reasons for possibly leaving New Canaan were consistent among respondents who reportedly do not expect to be living in the town “more than 1 year from now” and those who expect to be living in the town “more than 20 years from now.”

What would cause you to move from New Canaan to another town or state?



What would cause you to move from New Canaan to another town or state?	Will not be living in New Canaan more than one year from now	More than 1 year from now	More than 5 years from now	More than 10 years from now	More than 15 years from now	More than 20 years from now
Affordability of living	62.2%	53.4%	49.4%	41.1%	38.7%	32.0%
State income taxes	53.3%	54.1%	45.1%	39.2%	37.6%	29.2%
State taxes	53.3%	49.5%	43.0%	39.4%	37.0%	32.4%
Local property taxes/mill rate	62.2%	47.5%	42.3%	40.2%	30.9%	26.1%

Living in New Canaan Viewed as Good Value for Taxes Paid

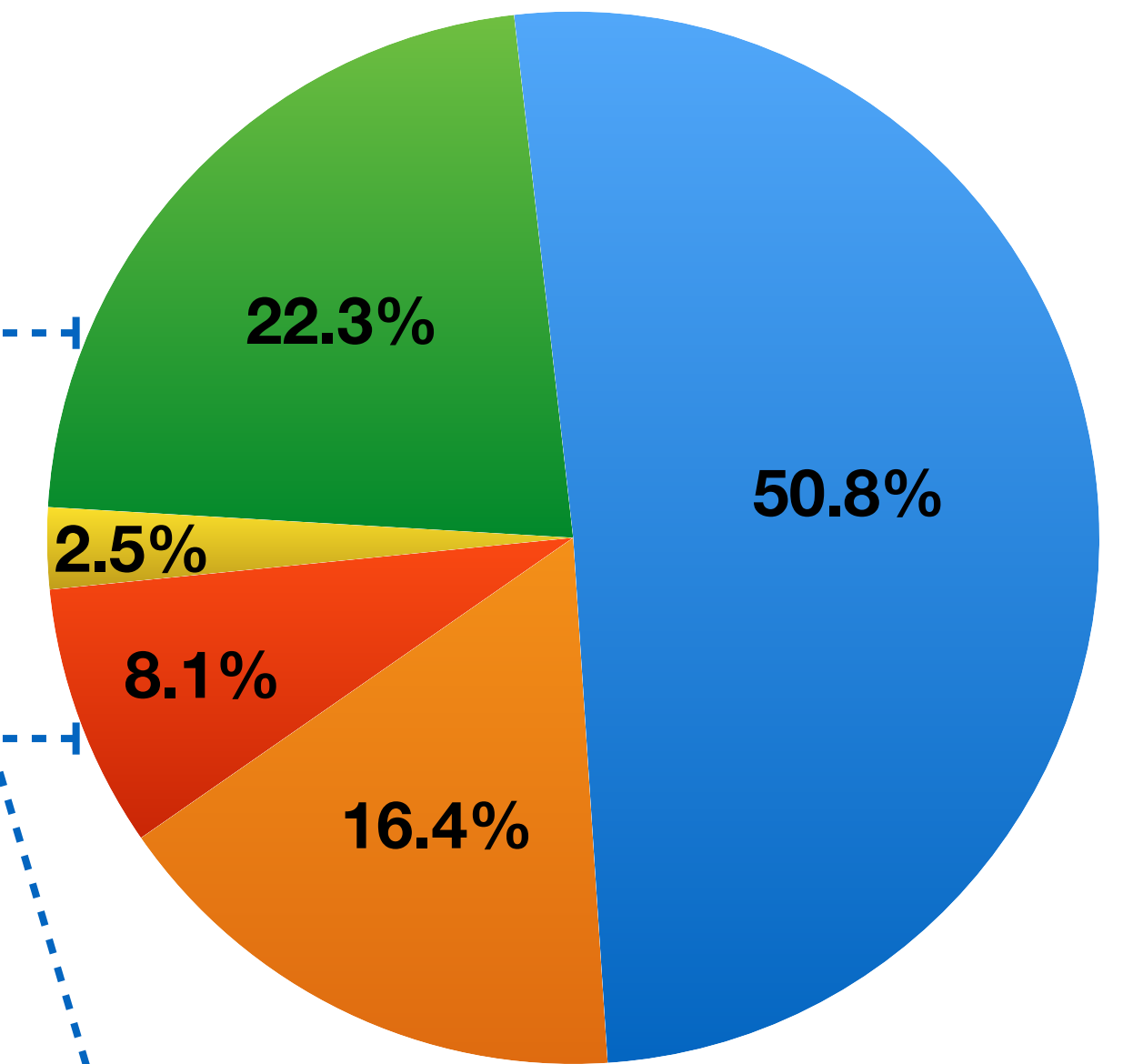
Over two-thirds of surveyed residents, 73.1%, reported they “strongly” (22.3%) or “somewhat” (50.8%) agree with the statement: *“Living in New Canaan is a good value for the taxes I pay and services I receive.”*

Nearly two-thirds of surveyed residents ages 55 to 64 (65.2%) reported they agree with the statement (either “strongly” or “somewhat”), a frequency noticeably lower than the 87.6% of respondents ages 25 to 34 who reported the same.

Further, the strong majority of residents who expect to be living in New Canaan “more than 15 years from now” (86.7%) and “more than 20 years from now” (85.3%) reported they “strongly” or “somewhat” agree with the statement.

Please tell me how strongly you agree or disagree with the following statement: *“Living in New Canaan is a good value for the taxes I pay and services I receive.”*

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know/unsure



Please explain why you “strongly agree?” (N=479)

- #1 “Quality of schools/education” (41.1%)
- #2 “Good community offerings- services, amenities, library” (25.1%)
- #3 “Fair/low taxes compared to other communities” (22.1%)

Please explain why you “strongly disagree?” (N=174)

- #1 “High taxes” (52.3%)
- #2 “Decline in property values” (16.1%)
- Receive no benefit-lack of amenities, services/inadequate services” (16.1%)

Perceptions of New Canaan Taxes

Surveyed residents' perceptions of their taxes compared with neighboring towns were generally aligned with the mill rates of each town compared to New Canaan's. However, over one-third of respondents (34.2%) reported they believe New Canaan's taxes are "higher" than Wilton's and one-quarter (25.3%) reported they believe New Canaan's taxes are "lower" than those of Greenwich. Additionally, three-quarters of respondents (75.2%) reported they believe New Canaan's taxes are "lower" than taxes in Westchester County.

Please tell me your perception of New Canaan's taxes compared with neighboring towns. For each of the following towns, would you say New Canaan's taxes are higher, about the same, or lower? (w/o "don't know" responses)

	Higher	Same	Lower
Darien	20.2%	69.5%	10.3%
Greenwich	37.0%	37.7%	25.3%
Westport	21.6%	60.5%	17.9%
Wilton	34.2%	41.9%	23.9%
Westchester County	11.7%	13.1%	75.2%

2020 Fiscal Year Mill Rate

New Canaan	18.24
Darien	16.47
Greenwich	11.682
Westport	16.86
Wilton	28.5373
Westchester County	--

1-in-4 Desire More Funding for Library, Schools & Public Works

The majority of surveyed residents reported they believe New Canaan should “retain the level of spending” for all seven (7) of the areas listed. However, it is important to note, over one-quarter of respondents reported they believe New Canaan should “increase” spending now or in the near future for the “library annual operating budget” (29.0%), “public works (road maintenance, snow plowing, sidewalks, etc.)” (28.2%), and “schools” (27.9%). Additionally, more than one (1) out of five (5) respondents reported they believe New Canaan should “lower” spending for “open space” (21.3%).

Q Please tell me if you believe New Canaan should increase spending, retain the level of spending, or lower spending now or in the near future for each of the following areas.
(w/o “don’t know” responses)

	Increase	Retain	Lower
Library annual operating budget	29.0%	57.0%	14.0%
Schools	27.9%	57.8%	14.2%
Open Space	16.9%	61.9%	21.3%
Public works (Road maintainance, Snow plowing, Sidewalks, etc.)	28.2%	65.5%	6.2%
Human services	11.1%	71.0%	17.9%
Parks and recreation/ Lapham Community Center	14.0%	73.8%	12.2%
Public safety (Police, Fire, Ambulance)	12.7%	77.8%	9.5%

Respondent Suggestions for Improvement

Taxes, trains, affordability of housing (business and residential), and parking issues topped both the list of changes respondents would make in New Canaan and the list of suggestions respondents made for attracting new residents.

Q If you could change one thing about New Canaan, what would that be?

Top 10 Responses	%
Taxes/property taxes	14.4%
Improve train service (more frequent, communication, schedule, faster, etc.)	10.6%
More diverse (people, events, etc.)	5.2%
Controlling development/proper zoning	5.1%
Parking (downtown, train, free, handicapped, etc.)	4.9%
More/viability of local businesses (restaurants, retail, dept., small, family friendly, etc.)	4.8%
Increase property values/revamp real estate market	4.0%
Fiscal responsibility/town spending	4.0%
Improve road conditions/repair roads	3.5%
Affordable rents for retail, business, etc.	3.3%

Q What could New Canaan do to attract new residents to the town?

Top 5 Responses

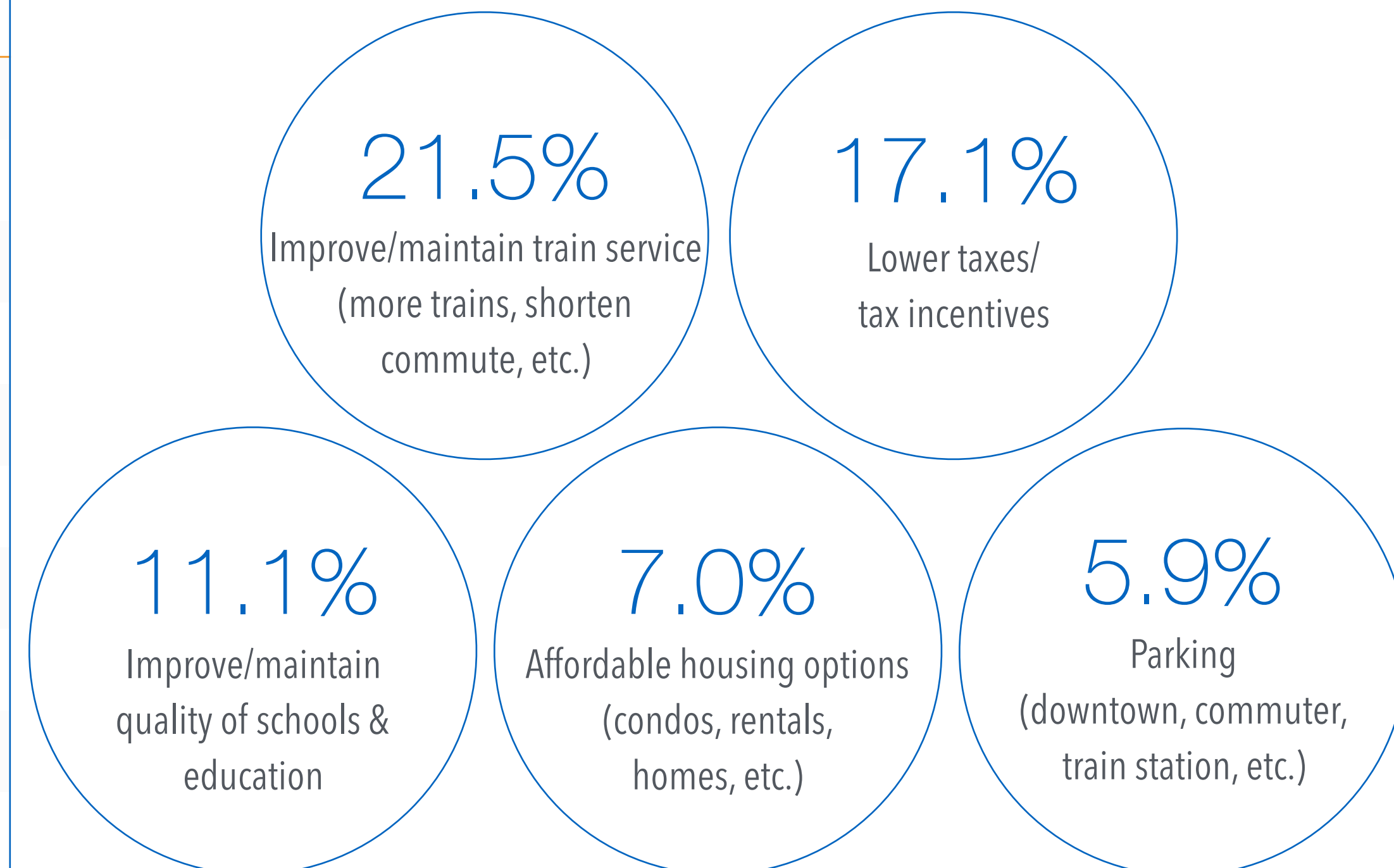


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Considerations

- **Focus on quality of school system.** Quality of schools was reported by the highest frequency of surveyed residents as the primary reason they chose to live in New Canaan, as well as the primary reason for deciding to continue living in the town. Improving/maintaining the quality of New Canaan's schools was also one of the top suggestions as to how New Canaan could attract new residents. It is important that New Canaan continues to focus on the public school systems and communicate the value of the education received, as this might attract potential residents who may be looking to start families or have school age children.
- **Ensure needs of older residents are being met.** Reasons for living in New Canaan differed between older and younger residents surveyed. While the primary reason among younger residents for deciding to continue living in New Canaan was quality of schools, residents 55 or older continue to live in New Canaan for the town's family friendliness/strength of the community. Additionally, nearly one in ten residents reported the lack of senior housing would cause them to move to another town or state. If not already being done so, New Canaan leaders should take a deeper dive into the needs of older residents. It may be helpful to conduct in-depth interviews or focus groups among senior residents of town in order to gain insights into their desires and needs as they get older.
- **Provide affordable housing.** Affordability of living was the top factor that would cause residents to move to another town or state. Further, affordable housing options and affordable rents for businesses were among the top suggestions for what New Canaan could do to attract new residents to town. These factors were also reported by high rates of respondents as aspects they would change about New Canaan if they could. It is important for the town to investigate ways to provide more affordable housing and rental options. This may also have a positive effect on the diversity in town, and give a wider variety of demographic groups an opportunity to live or work in New Canaan.

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