Report to Strategic Priorities and Policy Committee

To: Chair and Members
Strategic Priorities and Policy Committee

From: Lynne Livingstone, City Manager

Subject: 2023 Resident Satisfaction Survey

Date: December 12, 2023

Recommendation

That on the recommendation of the City Manager, the report, including the attached 2023 Resident Satisfaction Survey, **BE RECEIVED** for information.

Executive Summary

The 2023 Resident Satisfaction Survey was conducted by Forum Research Inc. from October 5–21, 2023. A total of 507 interviews were completed with London residents 18 years of age and older. Respondents were contacted by telephone through random digit dialling, which reaches both landlines and cell phones. Results throughout the report have been statistically weighted by age and gender to reflect the population of London based on the 2021 Census. Comparisons to other similarly sized municipalities have been included where possible.

The survey provides Londoners with an opportunity to share their perspectives and perceptions of key issues in our community. It covers a wide range of topics including top of mind issues, quality of life, value for tax dollars, satisfaction with municipal services and experiences with City staff, and welcoming and belonging.

Survey findings provide data-driven and performance-based reporting for Council, administration, and the public. The Resident Satisfaction Survey is a critical tool to gather opinions and perceptions on key questions that help inform strategic decisions and ensure that organizational priorities are aligned with the needs of residents.

Linkage to the Corporate Strategic Plan

Council's 2023-2027 Strategic Plan includes the Strategic Area of Focus 'Well-Run City.' This includes the Expected Result 'Londoners have trust and confidence in their municipal government' and the Strategy 'Measure and regularly report to Council and the community on the City's performance.'

Analysis

1.0 Background Information

1.1 Previous Reports Related to this Matter

Strategic Priorities and Policy Committee (SPPC): August 31, 2015, July 25, 2016, August 21, 2017, November 19, 2018, August 26, 2019, November 30, 2021, December 12, 2022.

2.0 Discussion and Considerations

2.1 Background

Each year the City of London undertakes a resident satisfaction survey as part of our efforts to improve service to our community, noting that the survey was paused in 2020 due to the COVID-19 pandemic. It is best practice across Canada for municipalities to conduct resident satisfaction or perception surveys on an annual or biannual basis.

The survey provides Londoners with an opportunity to share their perspectives and perceptions of key issues in our community. It covers a wide range of topics including top of mind issues, quality of life, value for tax dollars, satisfaction with municipal services and experiences with City staff, and welcoming and belonging.

These surveys are one of many tools the City uses to measure performance, providing valuable insight into overall public perception. Other tools include ongoing internal performance measurement processes (e.g., Strategic Plan Annual Performance Reports, Strategic Plan Impact Assessments, budgeting, business planning, continuous improvement, measurement of operational activities and services within individual Service Areas), participation in sector benchmarking initiatives (e.g., the Financial Information Return), and through external assessments (e.g., Macleans Best Places to Live reports).

2.2 2023 Survey Results

The 2023 Resident Satisfaction Survey, attached as Appendix A, was conducted by Forum Research Inc. between October 5 and October 21, 2023.

The survey was conducted by telephone and the sample was drawn using random digit dialling among City of London residents, which included both landline and cell phone only households. A total of 507 interviews were completed among residents 18 years of age and older. Results throughout the report have been statistically weighted by age and gender to reflect the population of London based on the 2021 Census and comparisons to other similarly sized municipalities have been included where possible. It is important to note that comparator municipalities are limited to the database available to the service provider.

The key findings from the 2023 Resident Satisfaction Survey are outlined below. Interpretation Note: “TOP2” refers to the net responses in the two most favourable categories (e.g., “good” and “very good”, “satisfied” and “very satisfied”, etc.). “BTM2” refers to the net responses in the two least favourable categories (e.g., “poor” and “very poor”, “somewhat dissatisfied” and “very dissatisfied”, etc.).

Top of Mind Issues

- More than 1 in 2 (54%) residents mention homelessness as one of the most important issues facing the City.
- 1 in 6 (17%) mention high interest rates, and 1 in 10 (9%) mentioned high inflation rates.
- 1 in 6 (16%) mention traffic / road congestion / traffic lights, and about 1 in 9 (11%) mention inadequate public transit / transportation.
- 1 in 7 mention road infrastructure issues, including road repair / snow removal / poorly maintained roads (14%).
- 1 in 7 (13%) mention a lack of available housing.
- More than 1 in 10 (11%) mention mental health and drug addictions.

Quality of Life

- The majority of London residents (TOP2: 75%) say their quality of life in London is good or very good, with 1 in 7 (14%) saying it’s very good.
- Residents who are 18-34 (TOP2: 82%) and 55+ (TOP2: 80%) are more likely than those 35-54 (TOP2: 66%) to say that their overall quality of life in London is good or very good.
- Perceptions of a very good quality of life are highest among residents who are 55+ (22%), or with an income over $100,000 (22%), or have completed post-graduation studies (27%).
- On the inverse, nearly 1 in 4 (23%) residents rate their quality of life in London as poor or very poor.

- Among those who say they have a poor or very poor quality of life in the city, the most common reasons given include the high cost of living (45%), and homelessness (45%).

City Service Assessment

- Around 3 in 4 London residents (TOP2: 72%) are satisfied with the overall level and quality of services provided by the city.
- Residents are most satisfied with the quality of service delivery from the City, with nearly 4 in 5 (TOP2: 78%) saying they are satisfied, and over 1 in 5 (23%) saying they are very satisfied.
- Around 3 in 4 (TOP2: 74%) say they are satisfied with the accessibility of City services, with more than 1 in 5 (21%) saying they are very satisfied.
- About 2 in 3 (TOP2: 67%) express their satisfaction with the timeliness of City services, with 1 in 6 (17%) saying they are very satisfied.
- The majority of London residents are somewhat or very satisfied with 30 out of 33 services.
- Residents are most satisfied with public libraries, drinking water, and stormwater management. Residents are least satisfied with parking, roads, and social/affordable housing.

Gap Analysis

- The gap analysis shows the difference between resident satisfaction with various City services and the perceived importance of each service.
- The gap analysis chart identifies areas for improvement and maintenance and is used for illustrative purposes to indicate the relative placement of the various services to other services, and not as a statistical placement of data.
- Primary areas recommended for improvement include revitalization of older neighbourhoods; economic development; environmental and climate action programs; social services; parking; public health; and children's services.

Value for Tax Dollars

- Most residents (TOP2: 73%) believe that they receive good value for their tax dollars, including 14% who believe they receive very good value.
- More residents would prefer for the City to increase taxes (50%) than cut services (37%). Around 1 in 4 (26%) would specifically prefer to increase taxes to maintain the current service levels.

Experience with City Staff

- Nearly half (44%) of residents surveyed report having contacted or dealt with the City in the last 12 months.
- Of the residents who contacted the City, more than 4 in 5 (TOP2: 88%) thought that staff were courteous, that staff were knowledgeable (TOP2: 86%), that they were treated fairly (TOP2: 82%), and that staff went the extra mile to help (TOP2: 59%).

Welcoming and Belonging

- More than 4 in 5 residents believe that London is a welcoming community (TOP2: 84%) and that they have a strong sense of belonging to the city (TOP2: 81%).

Conclusion

The results of the 2023 Resident Satisfaction Survey affirm the priorities set by Council in the 2023-2027 Strategic Plan. Significant work is underway to address the top-of-mind issues and factors that influence quality of life for Londoners, including housing and homelessness, safety and wellbeing, and London's recognition as a destination of choice.

The results also affirm Council's commitment to providing exceptional and valued services to our community. 2023 saw positive gains in the quality, accessibility and timeliness of our services, key drivers that influence overall satisfaction. Focused efforts to leverage these gains and increase overall satisfaction are woven throughout the Strategic Plan. Examples include improving public engagement practices, applying the Equity Tool to program decisions and service delivery, and increasing the capacity of employees to deliver excellent and consistent service at any point of contact.

Surveys are an important tool used by municipalities to assess residents' attitudes, needs, priorities, and satisfaction levels. This data can support Council decision-making, inform the work of Administration, and contribute to an overall understanding of the London community. The Annual Resident Satisfaction Survey is also a key component of Council's 2023-2027 Strategic Plan and the commitment to "Measure and publicly report to Council and the community on the City's performance."

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Submitted by:	**Rosanna Wilcox, Director, Strategy and Innovation**
Recommended by:	**Lynne Livingstone, City Manager**

FORUM RESEARCH INC.

Annual Resident Satisfaction Survey

The City of London

November 2023

London CANADA

Table of Contents

Survey Background

Objectives

Forum Research Inc. is pleased to present the City of London with the results of the 2023 Resident Satisfaction Survey.

Specific areas explored in the research include (but are not limited to):

- Top-of-mind issues in need of attention from local leaders;
- Overall impressions of the quality of life in the City of London;
- Perceptions of City services, including satisfaction and drivers of satisfaction (i.e., perceived importance);
- Perceptions of value for tax dollar and taxes in general; and
- Sense of welcoming and belonging to the city.

Executive Summary

Executive Summary

Top of Mind Issues

- More than half (55%) of the City's residents say that homelessness and poverty issues are the most important issues facing the City. The second most important set of issues facing the City are related to development /infrastructure (33%), followed by economic (30%) and transportation (26%). *Slides 14-16.*
  - The top individual issues mentioned include homelessness (54%), high interest rates (17%) roads / road repair / snow removal / poorly maintained roads (14%). 13% say a lack of available housing is one of the most important issues. *Slide 16*

Life in the City of London

- Three-quarters of residents (TOP2: 75%) rate the quality of life in the City of London as either good or very good. *Slide 18*
  - Factors contributing to Londoners good or very good quality of life include it having a good standard of living (22%), being a good, friendly, or nice city (21%), being a safe city or having low crime (18%), having lots to do (16%), and having everything they need (i.e., convenience) (14%). *Slide 21*
- Top reasons for residents to say they have a poor or very poor quality are that the cost of living is high (45%), homelessness (45%), a lack of housing or affordable housing (26%), and crime/public safety (23%). *Slide 23*

Executive Summary

Core Services & Satisfaction

- The majority of London residents are satisfied with City services, namely the quality of service delivery (TOP2: 78%), accessibility of services (TOP2: 74%), and time it takes to receive services (TOP2: 67%). *Slide 29*
- Public libraries (TOP2: 93%), drinking water (TOP2: 93%), stormwater management (TOP2: 91%), and sewers / wastewater treatment (TOP2: 90%) are the services residents are most satisfied with. *Slide 31*
  - On the contrary, London residents expressed the least satisfaction with social / affordable housing (TOP2: 21%) *Slide 33*
- A statistical analysis has been used to show the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction (i.e., perceived importance). Findings from this analysis found 7 primary areas of improvement for the City: *Slides 35-36*
  - Revitalization of Older Neighbourhoods
  - Economic Development
  - Environmental and Climate Action Programs
  - Social Services
  - Parking
  - Public Health
  - Children's Services

Executive Summary

Spending and Taxation

- Most London residents (TOP2: 73%) say they receive good or very good value for their tax dollars. *Slide 38*
- In order to help the City balance taxation and service delivery levels, the majority of respondents chose increasing taxes (NET: 50%) over cutting services (NET: 37%). *Slide 40*
  - Of those who support increasing taxes, 26% say that these dollars should be used to maintain current service levels, while 24% would rather services be enhanced or expanded services. *Slide 40*

Experience with City Staff

- 44% of London residents have had contact with the City within the last 12 months. *Slide 42*
  - The majority of those who have contacted the City are satisfied with the service they received (TOP2: 64%), and over half (54%) said they received all the service and support they needed, while 7 in 10 (TOP2: 70%) said they partially or fully received the service or support they needed. *Slides 44-45*
- These residents also felt that the staff were courteous (TOP2: 88%), knowledgeable (TOP2: 86%), fair (TOP2: 82%), and went an extra mile to help them (TOP2: 59%). *Slide 46*

Welcoming & Belonging

- More than 4 in 5 residents believe that London is a welcoming community (TOP2: 84%) and that they have a strong sense of belonging to the city (TOP2: 81%). *Slide 48*

Methodology

Methodology

Method:	CATI (Computer Aided Telephone Interview)
Criteria for Participation:	Residents in the City of London who are 18 years of age or older
Sample Size:	n=507
Average Length:	20 min
Margin of Error:	± 4.35%
Fieldwork Dates:	October 5th – October 21st, 2023

Additional Notes:

- CATI sample was drawn using random digit dialing (RDD) among City of London residents. A mix of landline and cell phone sample was used to reach cell phone-only households.
- Results throughout this report have been statistically weighted by age and gender, to ensure that the sample reflects the target population according to 2021 Census data.
- Comparisons to other Canadian municipalities have been included where possible.
- Significant differences across sub-groups are noted where they exist.

Reporting Considerations

TOP2 / BTM2

Top 2 (TOP2) and Bottom 2 (BTM2) reference the collected TOP2 positive and BTM2 negative responses, respectively where applicable. For example, a TOP2 grouping referred to as "satisfied" may be the combined result of "very satisfied" and "somewhat satisfied," where a grouping of "not satisfied" (BTM2) may be the combined result of "not very satisfied" and "not at all satisfied."

Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., "What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council?"), it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select "High interest rates" and "High inflation rates" as their answer.

Significance Testing

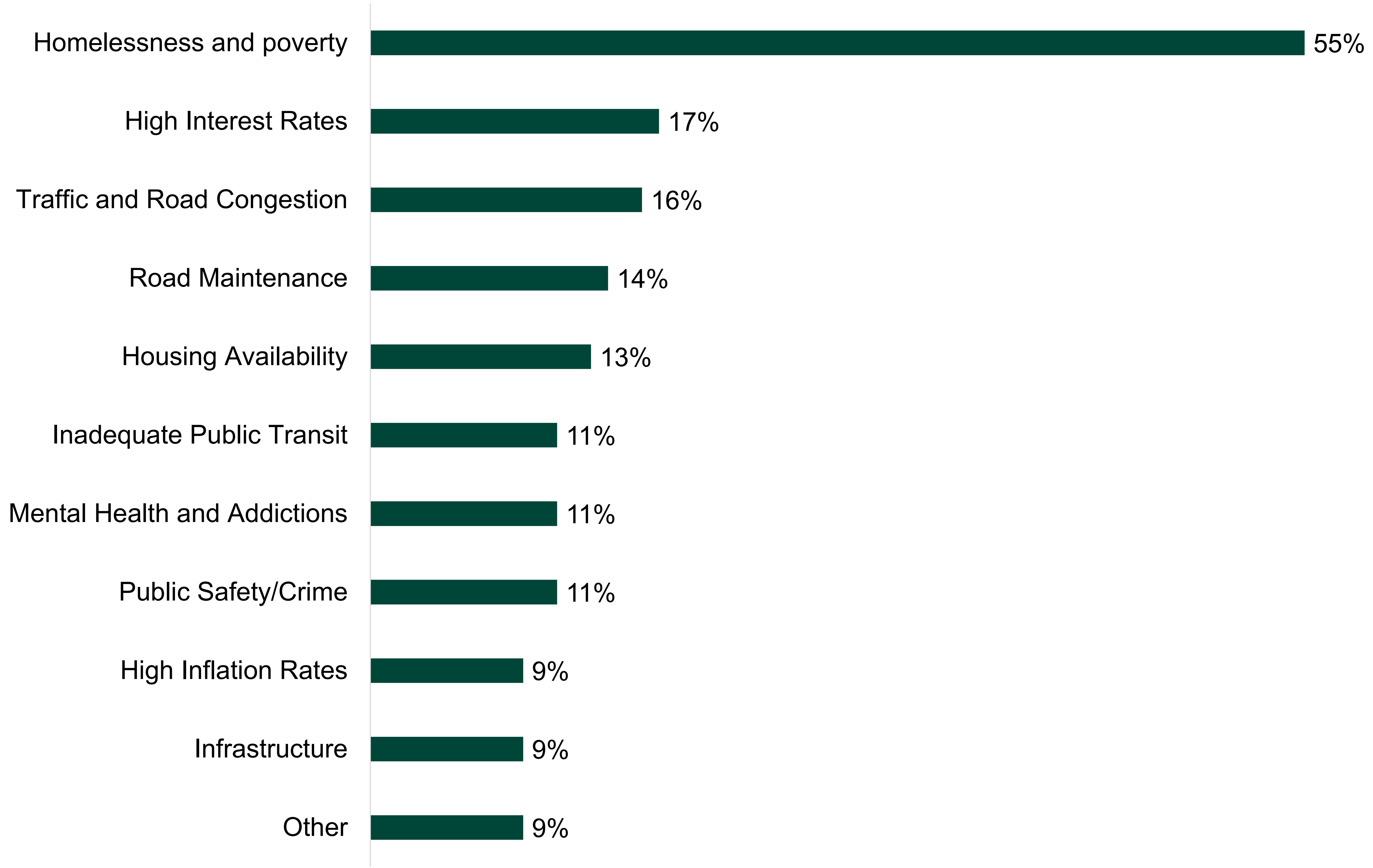
Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes. It is important to point out that, statistical differences exist only between the segments mentioned in the notes. In demographic breakout slides, statistically significant results (at the 95% confidence level) are highlighted in red and statistically significant differences between segments are indicated with letters. Each segment is denoted with letters (e.g., J, K, L, etc.). If the letter "J" appears under the response of a certain segment, this indicates that the response of that segment is significantly higher than the response of the segment denoted with the letter "J".

Detailed Findings

Top of Mind Issues

Top of Mind Issues

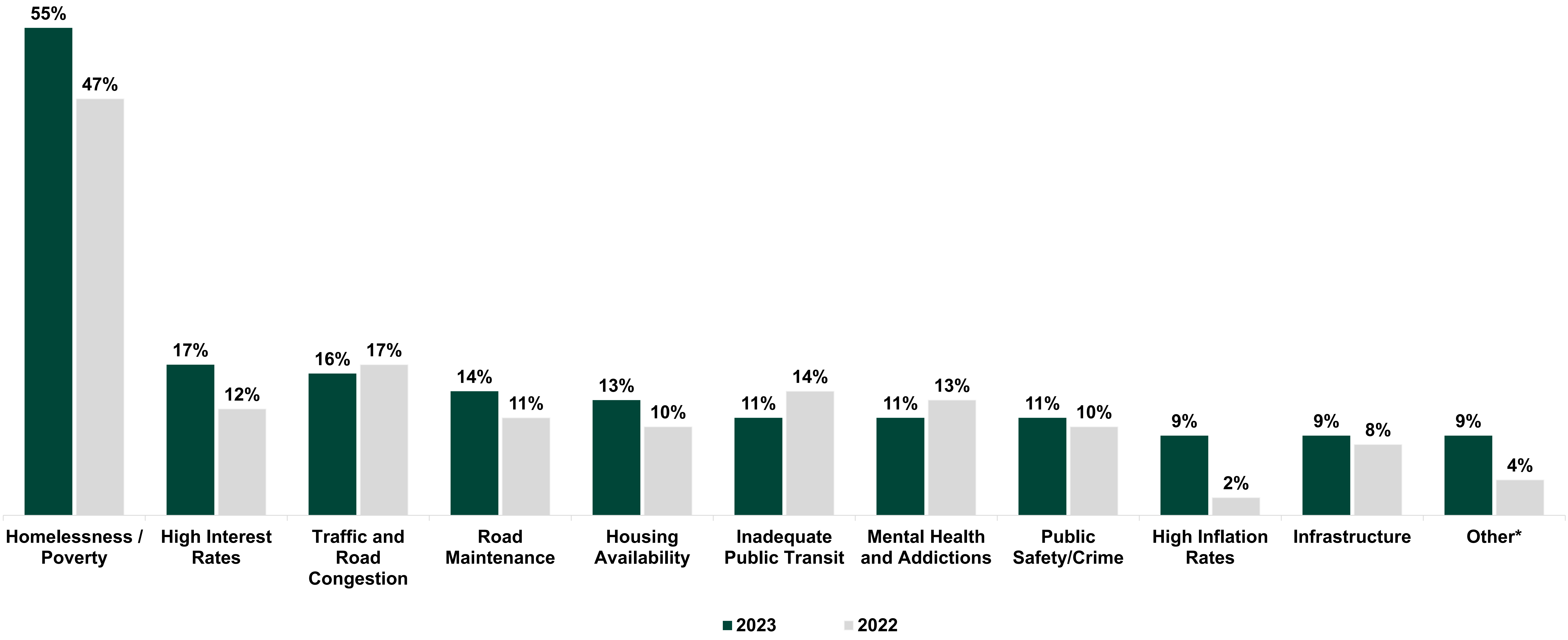
More than half (55%) of residents say homelessness and poverty is the most important issue facing the city.



Affordability concerns were frequently mentioned, especially high interest (17%) and high inflation rates (9%).

*Net categories for multiple response questions are calculated by adding up the number of respondents (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents (excluded Don't know / Not applicable)
Sample Size: n = 480

Top of Mind Issues



*Net categories for multiple response questions are calculated by adding up the number of respondents (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents (excluded Don't know / Not applicable)
Sample Size: 2023 (n = 480); 2022 (n=500)

Top of Mind Issues

NET: Homelessness / Poverty*	55%
Homelessness	54%
Poverty	2%
NET: Development / Infrastructure*	**33%**
Roads / Road repair / snow removal / poorly maintained roads	14%
Housing - lack of available housing	13%
Infrastructure	9%
Development - urban sprawl / loss of greenspace	3%
NET: Economics*	**30%**
High interest rates	17%
High inflation rates	9%
Unemployment / Jobs / poor job market	4%
Taxes	3%
Social assistance (e.g. employment insurance, sick benefits, etc.)	2%
NET: Transportation*	**26%**
Traffic / road congestion / traffic lights	16%
Inadequate public transit / transportation	11%
Rapid transit / support for rapid transit	2%

NET: Health*	15%
Mental health / Drug addiction	11%
Hospital wait times / lack of medical care	6%
NET: Other*	**27%**
Public safety (e.g. crime, policing, speeding, etc.)	11%
Waste management (e.g. garbage collection, recycling, composting, etc.)	3%
Mayor/city government	3%
City cleanliness (e.g. dirty, graffiti, needles lying around, etc.)	2%
Education	2%
Other	9%

Note: Table does not include responses with less than 2% mentions.

Within poverty issues, over 1 in 2 (54%) residents mention homelessness as one of the most important issues facing the City.

Within development / infrastructure issues, 1 in 7 mentioned roads / road repair / snow removal / poorly maintained roads (14%), and a lack of available housing (13%).

Within economics issues, 1 in 6 (17%) mentioned high interest rates, while 1 in 10 (9%) mentioned high inflation rates.

Within transportation issues, about 1 in 6 (16%) mentioned traffic / road congestion / traffic lights, while about 1 in 9 (11%) mentioned inadequate public transit / transportation.

1 in 7 (NET: 15%) residents also say health is the most important issue facing the city, with mental health and drug addiction as the most important health issue (11%).

Other important issues facing the city included public safety (11%) and waste management (3%) and mayor/city government (3%).

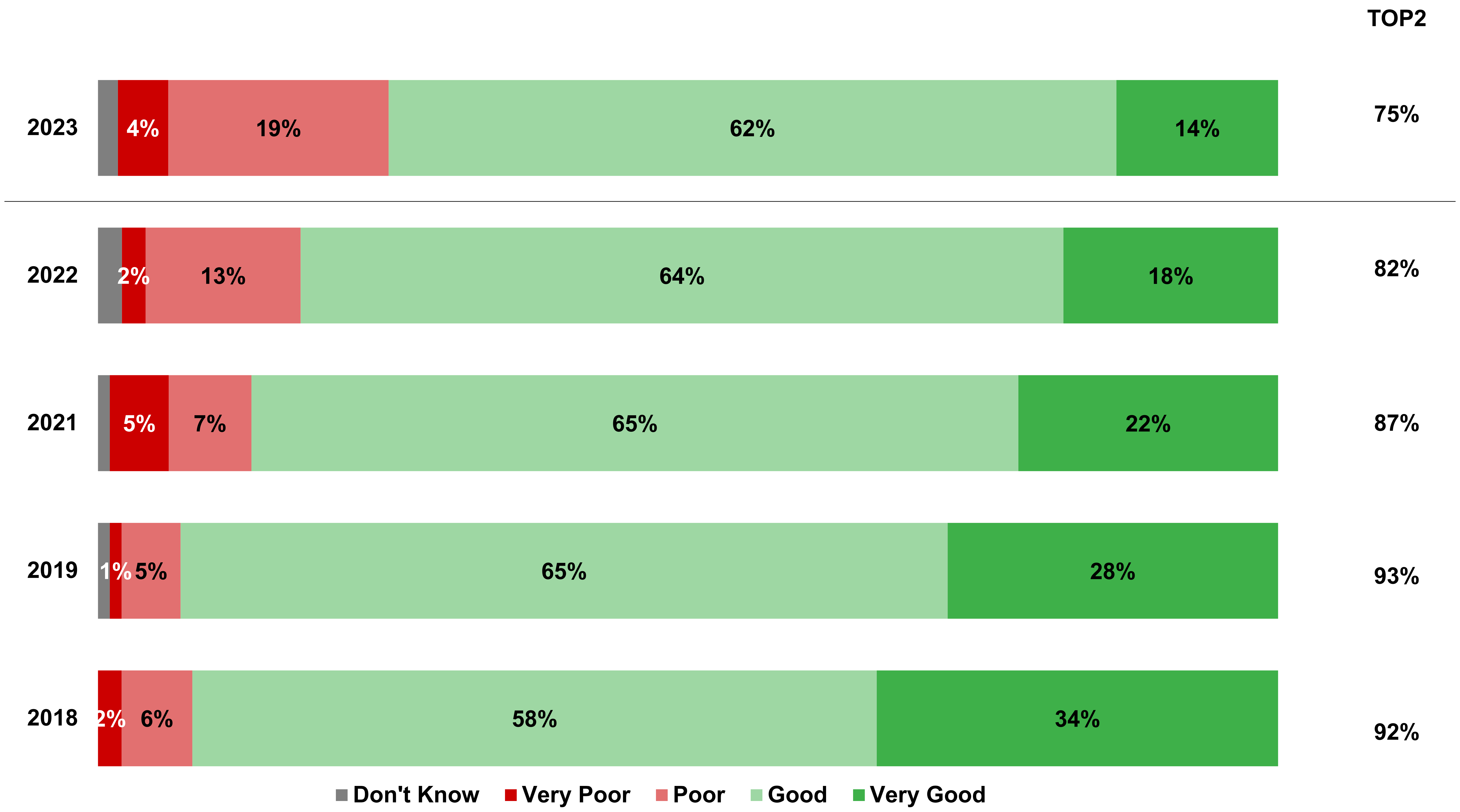
*Net categories for multiple response questions are calculated by adding up the number of respondents (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents (excluded Don't know / Not applicable)
Sample Size: n = 480

Quality of Life

Quality of Life

London CANADA

3 in 4 (TOP2: 75%) residents rate their quality of life in London as good or very good.



The majority of London residents (TOP2: 75%) say their quality of life in London is good or very good, with 1 in 7 (14%) saying it's very good.

Nearly 1 in 4 (BTM2: 23%) residents rate their quality of life in London poorly.

Residents who are 18-34 (TOP2: 82%) and 55+ (TOP2: 80%) are more likely than those 35-54 (TOP2: 66%) to say that their overall quality of life in London is good or very good.

Q2. How would you rate the overall quality of life in the City of London today? Would you say it's…?
Framework: All respondents
Sample Size: 2023 (n=507); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

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Quality of Life - Demographics

Perceptions of a very good quality of life are highest among residents who are 55+ (22%), or with an income over $100,000 (22%), or have completed post-graduation studies (27%).

Quality of Life (% Very Good)

Year	Total	Gender		Age			Income			Education					
		Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College / Tech/ Uni	Comp. College /Tech	Comp. Uni	Comp. Post Grad
		A	B	C	D	E	F	G	H	I	J	K	L	M	N
2023	**14%**	**16%**	**12%**	**3%**	**12% C**	**22% CD**	**9%**	**9%**	**22% FG**	**12%**	**9%**	**9%**	**9%**	**16%**	**27% JKL**
2022	19%	22%	15%	18%	11%	**25% D**	19%	21%	18%	16%	15%	14%	13%	**27% L**	18%
2021	22%	**28% B**	17%	14%	23%	**27% C**	17%	19%	**32% FG**	0%	**18% I**	**20% I**	**16% I**	**27% IM**	**34% IJM**
2019	28%	28%	29%	19%	**34% C**	**33% C**	18%	29%	**37% F**						
2018	34%	35%	34%	26%	42%	34%	25%	41%	41%						

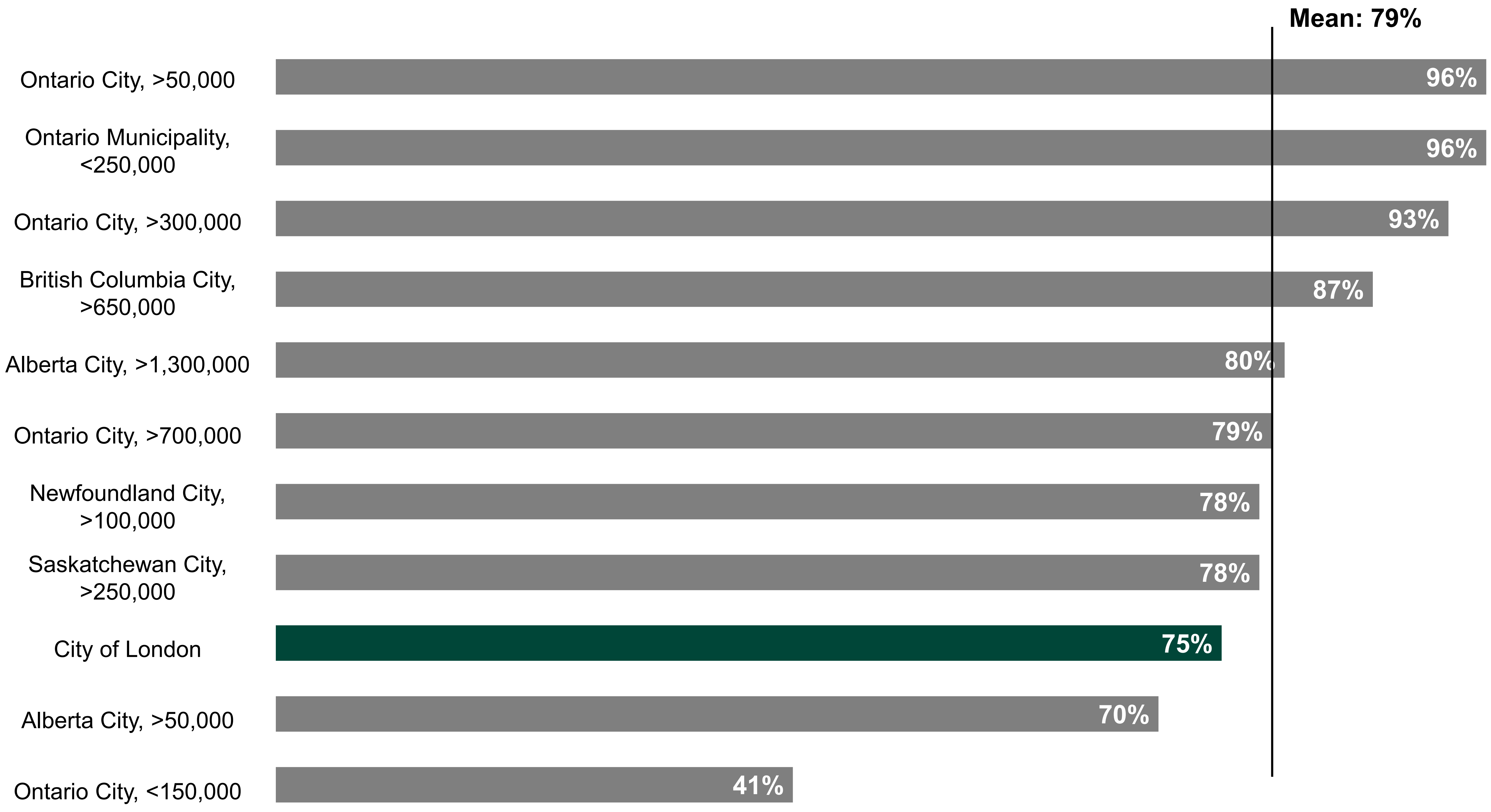
Residents with an income over $100,000 are more likely to rate their quality of life in London as very good (22%) compared to those with an income less than $50,000 (9%) or from $50,000 to $100,000 (9%).

Residents who completed post-graduation studies are also more likely to say they have a very good quality of life in London (27%) than those who completed high school (9%), those who completed some community college / technical school (9%), or those who completed community college / technical school (9%).

Q2. How would you rate the overall quality of life in the City of London today? Would you say it's…?
Framework: All respondents
Sample Size: 2023 (n=498); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

Quality of Life - Benchmarks

75% of City of London residents rate their quality of life as 'good' or 'very good' – which is below the average score (79%) of 11 municipalities in Canada.

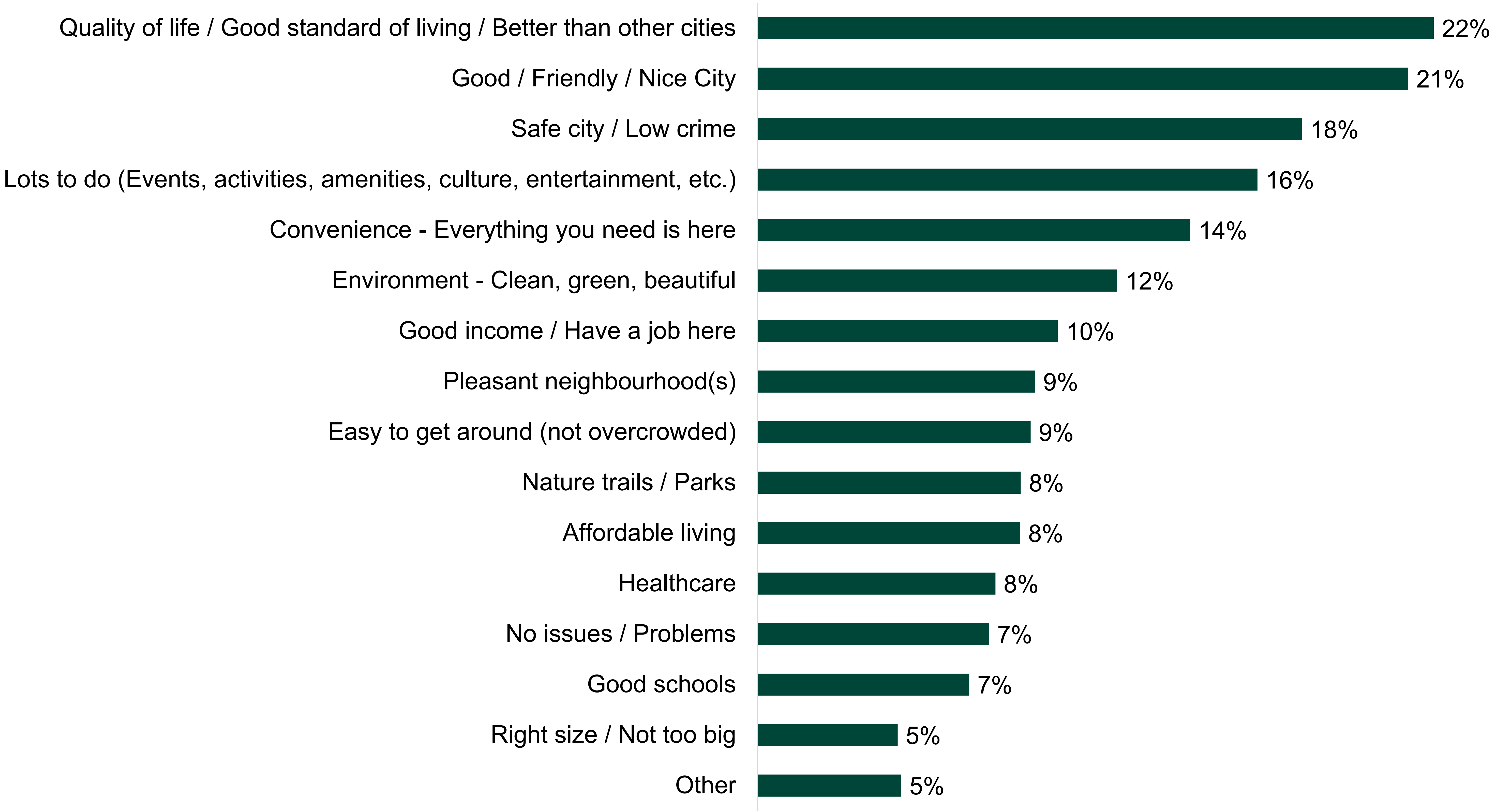


*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2022-2023. Comparisons for this question include 11 municipalities across Canada, with populations ranging from ~50,000 to ~1,300,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Q2. How would you rate the overall quality of life in the City of London today? Would you say it's…?
Framework: All respondents
Sample Size: n = 498

Reason for Good Quality of Life

About a fifth of those who say their quality of life in the city is good or very good is because of the city's quality of life / good standard living / better than other cities (22%) and it is a good, friendly, or nice city (21%).



Note: Visualization does not include responses with less than 5% mentions.

Q3a. Why do you think the quality of life is [good/very good]?
Framework: Respondents who said good/very good
Sample Size: n=361

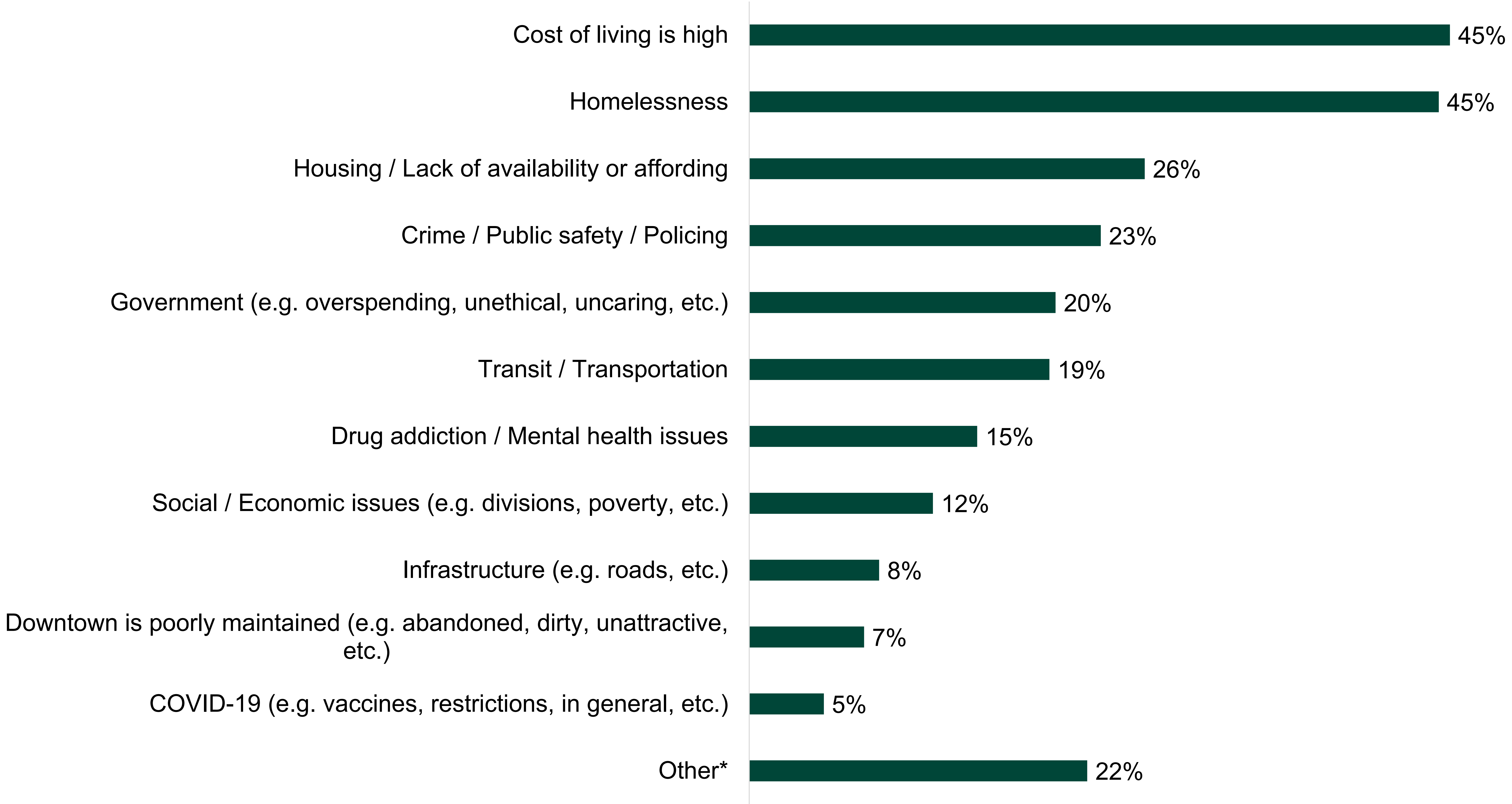
Reason for Good Quality of Life

Reason	2023	2022	2021	2019	2018
Quality of life/ Good standard of living/ Better than other cities	**22%**	17%	12%	12%	17%
Good/Friendly/Nice City	**21%**	20%	23%	13%	7%
Safe city/ Low crime	**18%**	17%	16%	13%	15%
Lots to do (Events, activities, amenities, culture, entertainment, etc.)	**16%**	17%	16%	20%	17%
Convenience – Everything you need is here	**14%**	15%	15%	8%	7%
Environment – Clean, green, beautiful	**12%**	12%	11%	7%	6%
Good income/Have a job here	**10%**	12%	11%	11%	11%
Easy to get around (not overcrowded)	**9%**	5%	6%	7%	5%
Pleasant neighbourhood(s)	**9%**	4%	10%	5%	5%
Nature trails/Parks	**8%**	13%	10%	8%	11%
Affordable living	**8%**	10%	7%	6%	7%
Healthcare	**8%**	8%	10%	7%	9%
Good schools	**7%**	7%	8%	8%	8%
Right size/ Not too big	**5%**	6%	5%	10%	9%
Other	**5%**	4%	8%	-	-
Good services (police/fire)/Social programs	**4%**	7%	10%	6%	7%

Q3a. Why do you think the quality of Life is [good/ very good]? *Visualization does not include responses with less than 5% mentions; except for 'Good services'*
Framework: Respondents who said good/very good;
Sample Size: 2023 (n=361); 2022 (n=416); 2021 (n=441).

Reason for Poor Quality of Life

Around 1 in 2 of those who say they have a poor or very poor quality of life in the city say it's because of the high cost of living (45%), and homelessness (45%).



Note: Visualization does not include responses with less than 5% mentions.

Other common reasons that contributes to the poor or very poor quality of life of residents include:

- Lack of affordable housing (26%)
- Crime / public safety / policing (23%)
- Government issues (20%)
- Transit / transportation (19%)

*Other responses include single mentions that cannot be grouped into categories.
Q3b. Why do you think the quality of life is [poor/ very poor]? (open-end)
Framework: Respondents who said poor/very poor
Sample Size: n=114

Reason for Poor Quality of Life

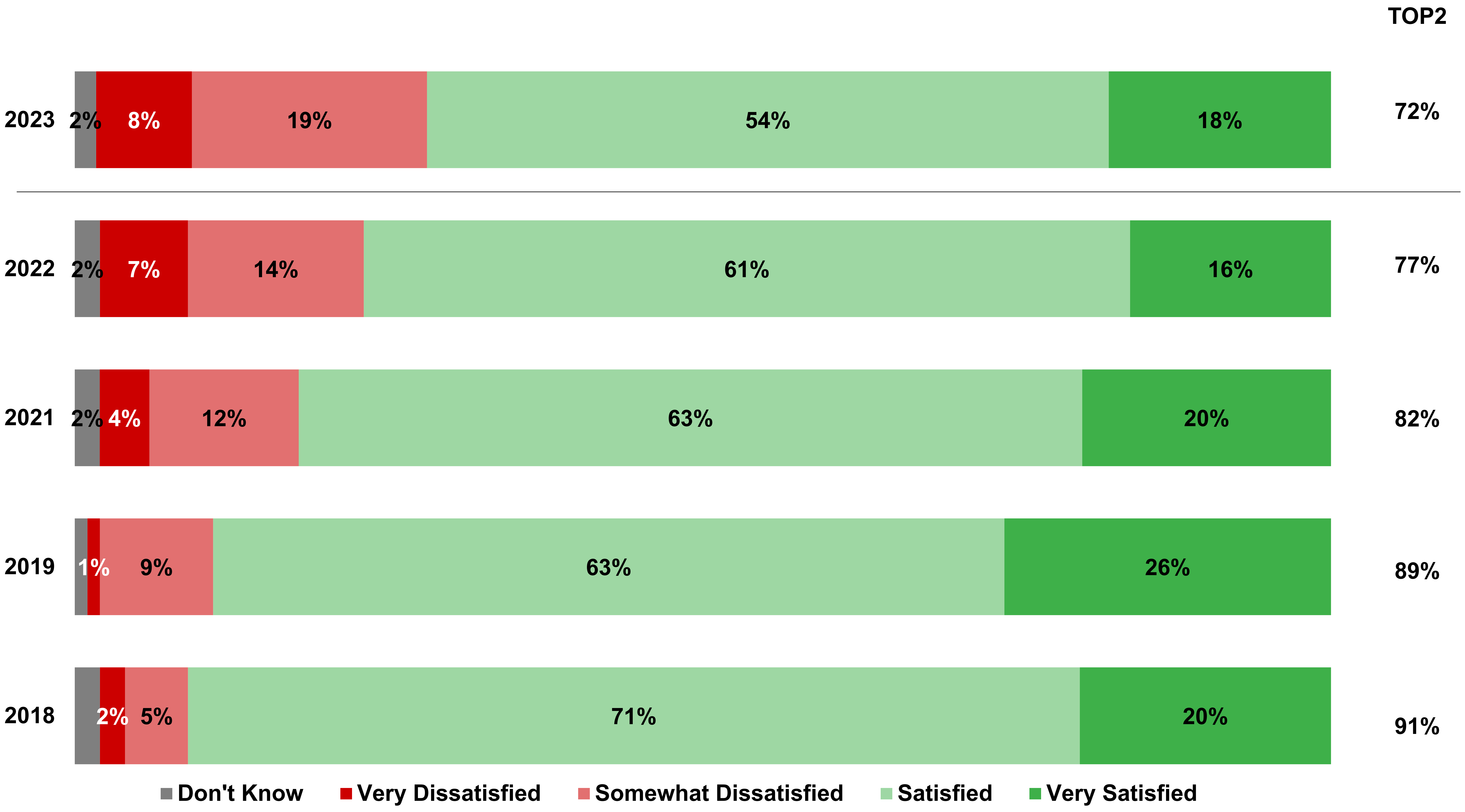
Reason	2023	2022	2021
Cost of living is high	**45%**	36%	23%
Homelessness	**45%**	41%	24%
Housing / Lack of availability or affording	**26%**	24%	19%
Crime / Public safety / Policing	**23%**	30%	23%
Other*	**22%**	8%	11%
Government (e.g. overspending, unethical, uncaring, etc.)	**20%**	8%	8%
Transit / Transportation	**19%**	12%	6%
Drug addiction / Mental health issues	**15%**	26%	17%
Social / Economic issues (e.g. divisions, poverty, etc.)	**12%**	20%	9%
Infrastructure (e.g. roads, etc.)	**8%**	13%	4%
Downtown is poorly maintained (e.g. abandoned, dirty, unattractive, etc.)	**7%**	14%	12%
COVID-19 (e.g. vaccines, restrictions, in general, etc.)	**5%**	11%	10%
Employment opportunities / Jobs	**3%**	15%	5%
Health care	**3%**	11%	6%

*Other responses include single mentions that cannot be grouped into categories.
Q3b. Why do you think the quality of life is [poor/ very poor]? (open-end)
Framework: Respondents who said poor/very poor
Sample Size: 2023 (n=114); 2022 (n=76); 2021 (n=63)

City Service Assessment

Overall Satisfaction

Around 3 in 4 London residents (TOP2: 72%) are satisfied with the overall level and quality of services provided by the city.



Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents
Sample size: 2023 (n=507); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

Overall Satisfaction - Demographics

Satisfaction with City Services (% Very Satisfied)

Year	Total	Gender		Age			Income			Education					
		Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College / Tech/ Uni	Comp. College /Tech	Comp. Uni	Comp. Post Grad
		A	B	C	D	E	F	G	H	I	J	K	L	M	N
2023	**18%**	**23% B**	**14%**	**20%**	**13%**	**20%**	**22% G**	**11%**	**19%**	**43%**	**14%**	**14%**	**21%**	**20%**	**18%**
2022	16%	17%	16%	16%	13%	19%	17%	17%	12%	16%	15%	7%	12%	24% KLN	11%
2021	20%	21%	19%	22%	16%	21%	20%	20%	16%	13%	22%	23%	15%	19%	25%
2019	26%	28%	24%	27%	27%	26%	-	-	-	-	-	-	-	-	-
2018	20%	19%	21%	14%	17%	27%	-	-	-	-	-	-	-	-	-

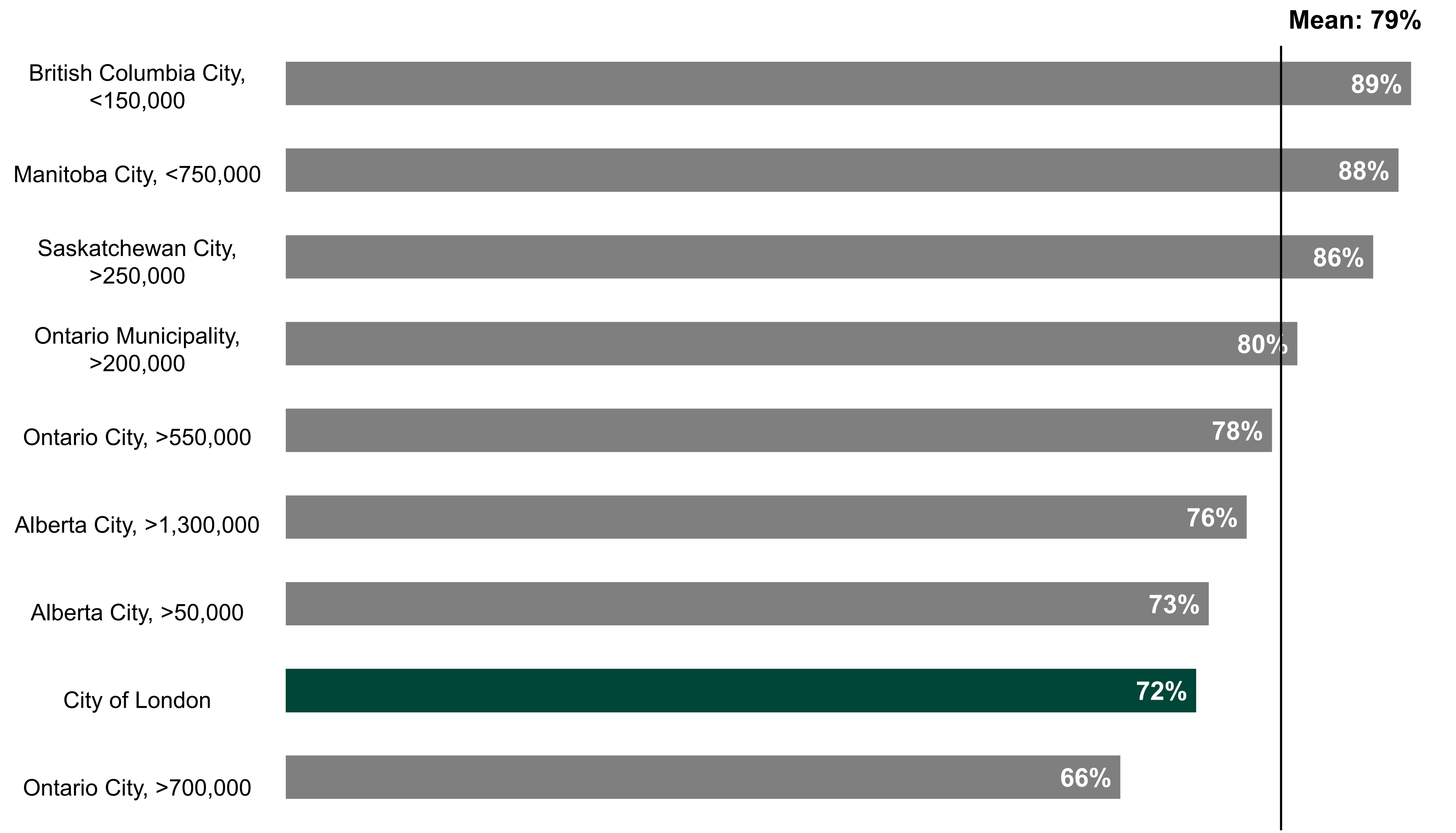
Male residents are more likely to rate their satisfaction with City as very satisfied (23%) compared to female residents (14%).

Residents with an income less than $50,000 are more likely to rate their satisfaction with City as very satisfied (22%) compared to those with an income from $50,000 to $100,000 (11%).

Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents
Sample Size: 2023 (n=498); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

Overall Satisfaction - Benchmarks

72% of City of London residents are satisfied with the overall services the City provides – which is below the average score (79%) of 9 municipalities in Canada.



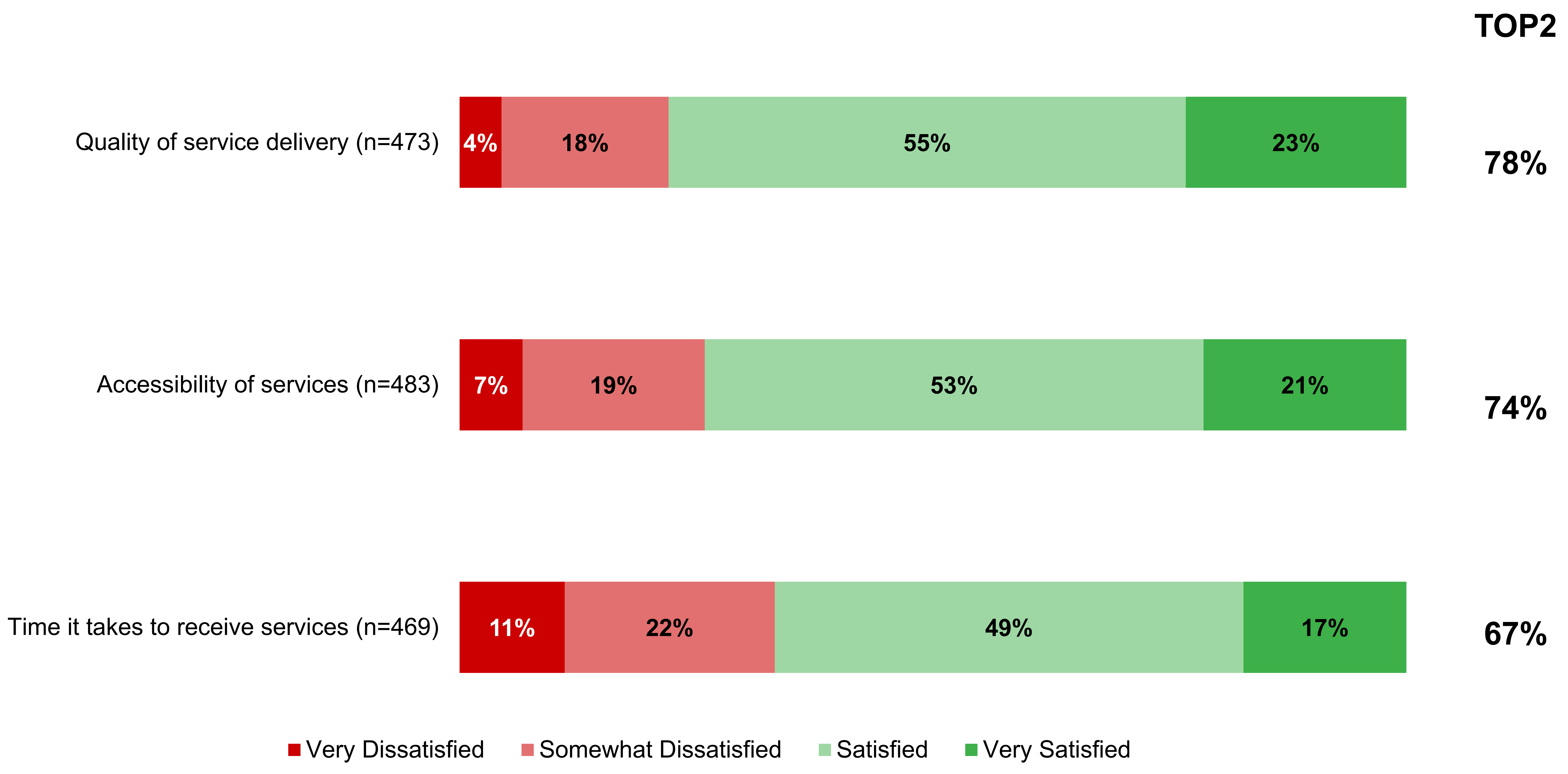
When compared with other municipalities, the City of London ranks below the average rating of overall satisfaction.

*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2022-2023. Comparisons for this question include 8 municipalities across Canada, with populations ranging from ~50,000 to ~1,300,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents
Sample Size: n = 498

Satisfaction with Aspects of Services

The majority of London residents are satisfied with the quality of service delivery (TOP2: 78%), the accessibility of services (TOP2: 74%), and the time it takes to receive services (TOP2: 67%)



Residents are most satisfied with the quality of service delivery from the City, with nearly 4 in 5 (TOP2: 78%) saying they are satisfied, and over 1 in 5 (23%) saying they are very satisfied.

Around 3 in 4 (TOP2: 74%) say they are satisfied with the accessibility of City services, with more than 1 in 5 (21%) saying they are very satisfied.

About 2 in 3 (TOP2: 67%) express their satisfaction with the timeliness of City services, with 1 in 6 (17%) saying they are very satisfied.

Q4b-d. And using that same satisfaction scale, how about…?
Framework: All respondents
Sample Size: Shown in chart above; varies for each area

Satisfaction with Aspects of Services (Trending)

TOP2	**2023**	2022	2021	2019	2018
Quality of service delivery	**78%**	71%	80%	85%	84%
Accessibility of services	**74%**	70%	75%	80%	81%
Time it takes to receive services	**67%**	57%	68%	72%	75%

Q4b-d. And using that same satisfaction scale, how about…?
Framework: All respondents
Sample Size: 2023 (n=483); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

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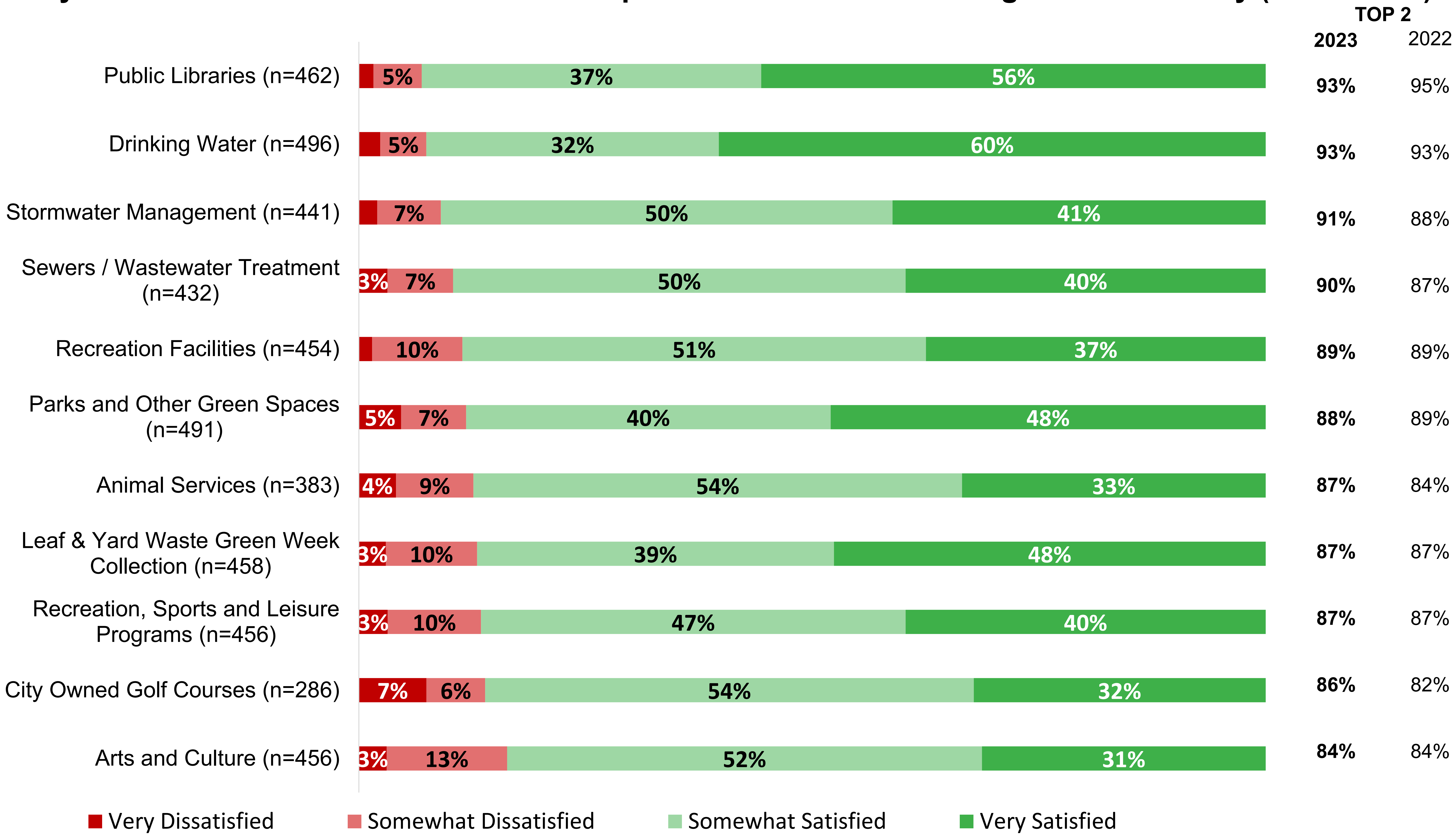
Satisfaction with Individual Service

Majority of London residents are somewhat or very satisfied with 30 out of 33 services provided by the City. Residents are most satisfied with the public libraries and drinking water in the city (TOP2: 93%).



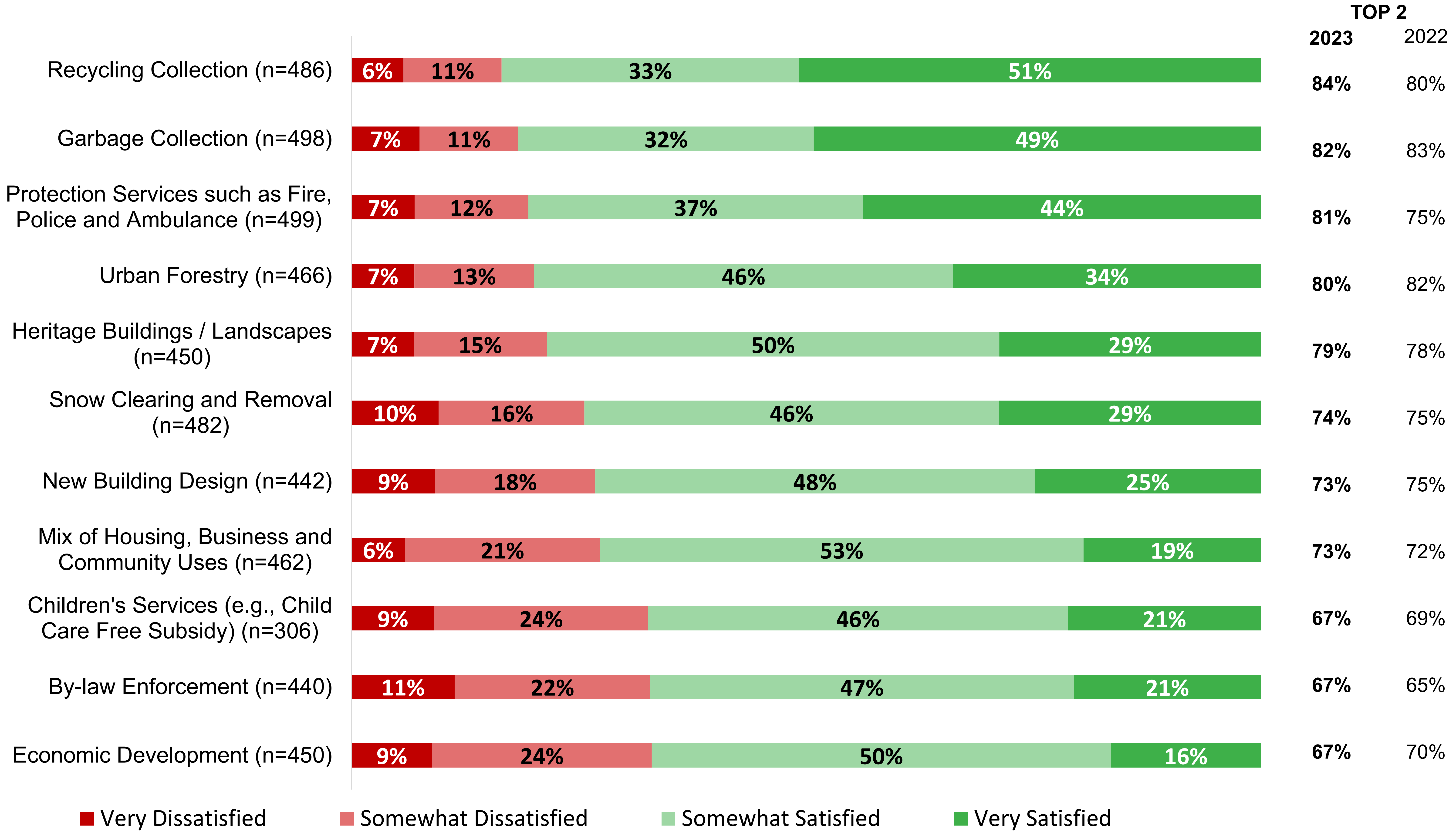
Around 9 in 10 residents are satisfied with the City's stormwater management (TOP2: 91%), sewers / wastewater treatment (TOP2: 90%), recreation facilities (TOP2: 89%), and parks and other green spaces (TOP2: 88%).

More than 8 in 10 residents are also satisfied with animal services (TOP2: 87%), leaf & yard waste green week collection (TOP2: 87%), recreation / sports and leisure programs (TOP2: 87%), City owned golf courses (TOP2: 86%), as well as arts and culture (TOP2: 84%).

Q5. Now we'd like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don't know
Sample Size: Shown in chart above; varies for each area

Satisfaction with Individual Service (cont'd)

Around 8 in 10 residents are satisfied with recycling collection (TOP2: 84%), garbage collection (TOP2:82%), fire/police and ambulance services (TOP2: 81%), and urban forestry (TOP2: 80%).



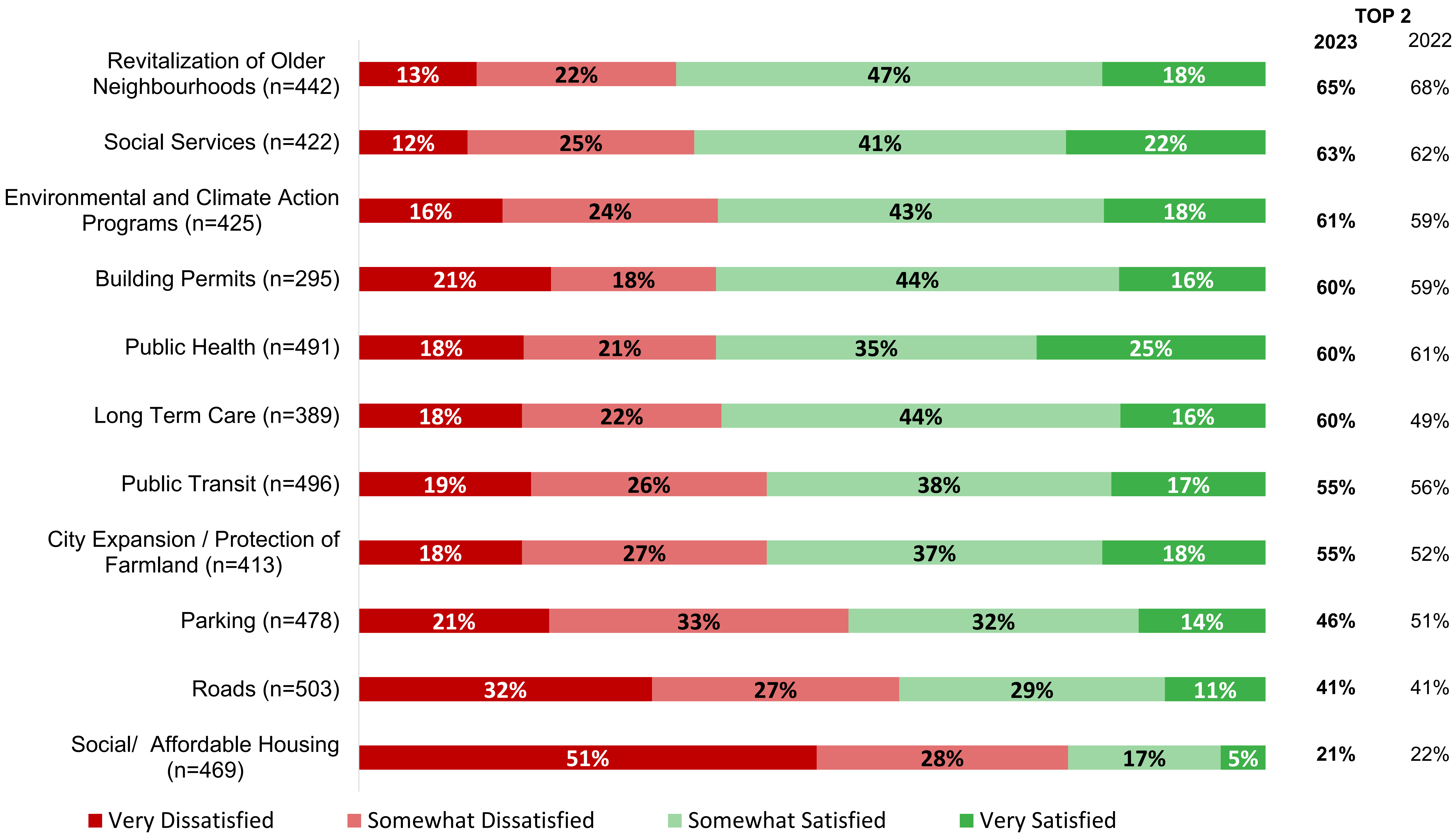
Over 7 in 10 residents are satisfied with the City's heritage building / landscapes (TOP2:79%), snow clearing and removal (TOP2: 74%), new building design (TOP2: 73%), and mix of housing / business / community uses (TOP2: 73%).

About 2 in 3 residents are satisfied with the City's children's services (TOP2: 67%), by-law enforcement (TOP2: 67%) and economic development (TOP2:67%).

Q5. Now we'd like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don't know
Sample Size: Shown in chart above; varies for each area

Satisfaction with Individual Service (cont’d)

Residents are least satisfied with the social and affordable housing in the city (TOP2: 21%).



Over 3 in 5 residents are satisfied with the City’s revitalization of older neighborhoods (TOP2: 65%), social services (TOP2: 63%), environmental and climate action programs (TOP2: 61%), building permits (TOP2: 60%), public health (TOP2:60%), and long-term care (TOP2:60%).

More than half of residents are satisfied with public transit (TOP2: 55%), and City expansion/ protection of farmland (TOP2: 55%).

Less than half of residents are satisfied with the City’s parking (TOP2:46%) and roads (TOP2: 41%). Only 1 in 5 residents express satisfaction with the City’s social/ affordable housing (TOP2: 21%).

Q5. Now we’d like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don’t know
Sample Size: Shown in chart above; varies for each area

Gap Analysis

Interpreting the Gap Analysis

The Gap analysis shows the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction.

- **Satisfaction scores** are plotted vertically (along the Y-axis). They represent overall stated satisfaction (TOP2%) with each of the individual City services.
- **Impact on overall satisfaction scores** are plotted horizontally across the bottom of the chart (along the X-axis). They are based on a statistical method called regression analysis that determines how a specific service ("independent variable") contributes to residents' overall satisfaction with the services ("dependent variable"). Impact on overall satisfaction can also be referred to as perceived importance.

As a result of the analysis, City services have distributed among four areas:

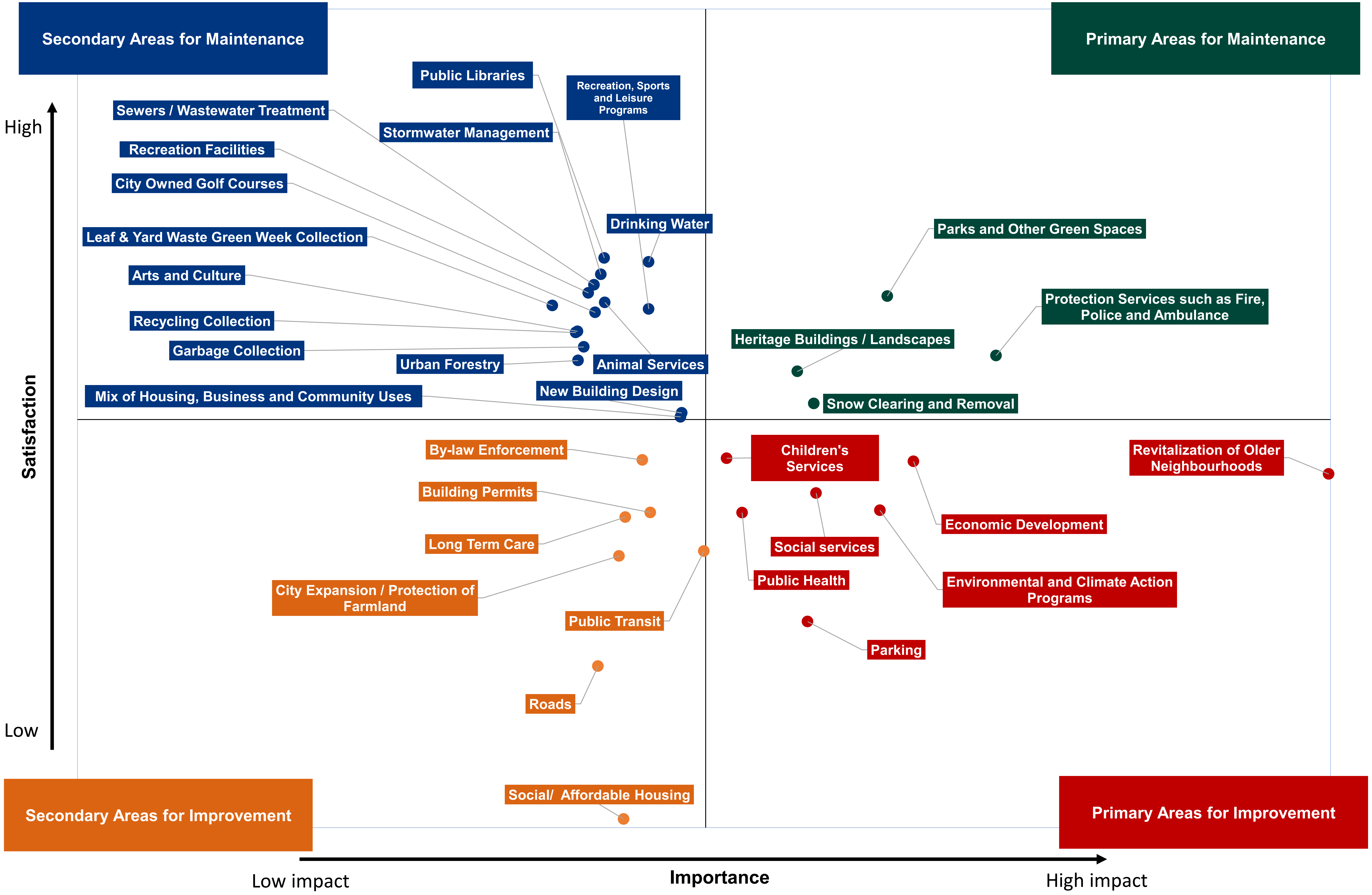
1. **Primary Areas for Improvement:**
Services that have the highest impact on overall satisfaction, but with lower individual satisfaction scores. The regression analysis identifies that these services are the strongest drivers of satisfaction. If the City can increase satisfaction in these areas, this will have the largest impact on overall satisfaction with City services.

2. **Secondary Areas for Improvement:**
Services that have lower impact on overall satisfaction and have lower individual satisfaction scores. This should be the secondary area of focus to improve the satisfaction scores.

3. **Primary Areas for Maintenance:**
Services that have a relatively high impact on overall satisfaction and high individual satisfaction scores. The focus here is on maintaining the current level of service and satisfaction.

4. **Secondary Areas for Maintenance:**
Services that have a lower impact on overall satisfaction but high individual satisfaction scores. The focus here should also be to maintain current satisfaction levels.

Gap Analysis



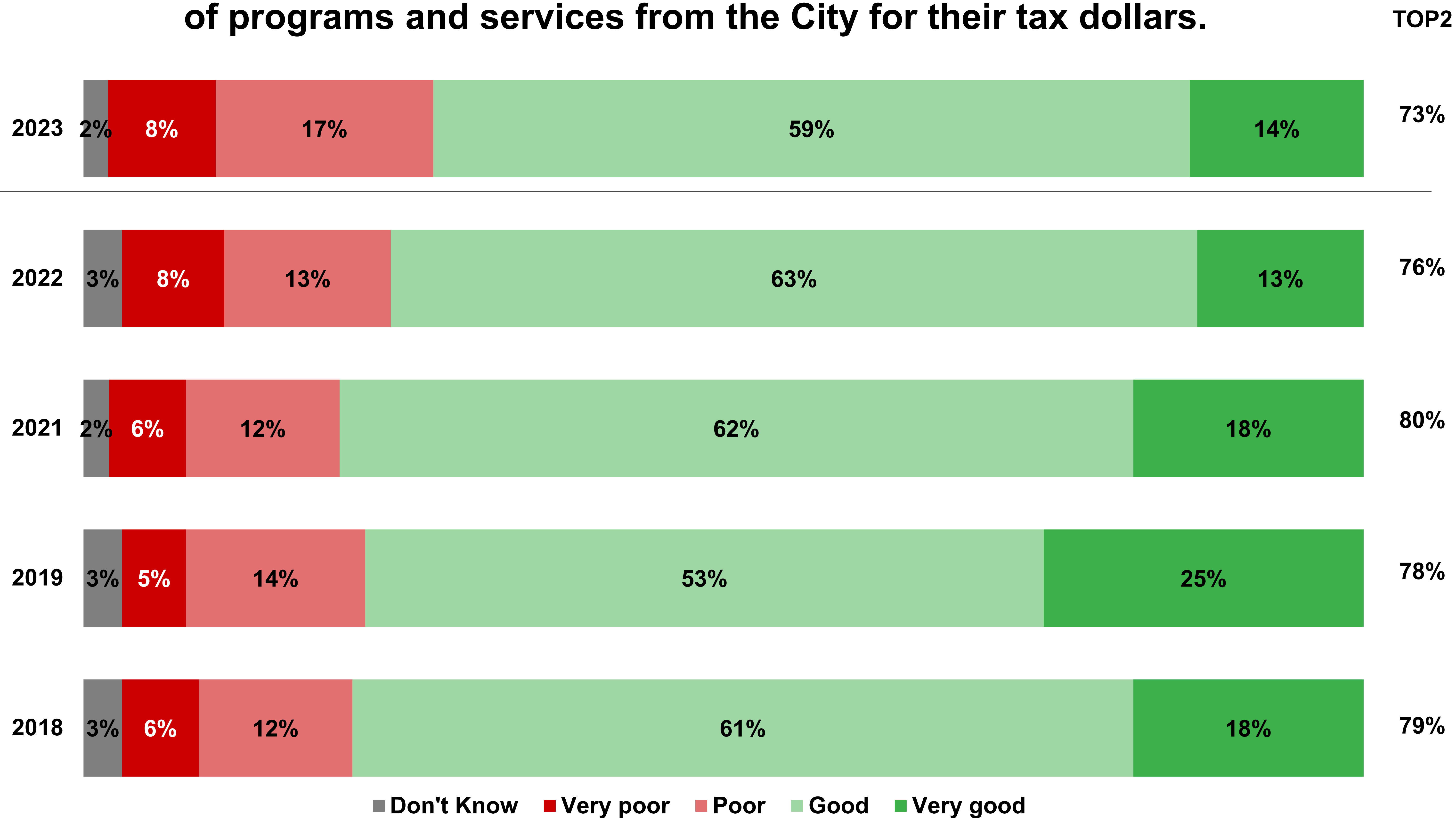
The services that the city should consider as **primary areas for improvement** include:

- Revitalization of Older Neighbourhoods
- Economic Development
- Environmental and Climate Action Programs
- Social Services
- Parking
- Public Health
- Children's Services

Value for Tax Dollars

Value for Tax Dollars

Nearly 3 in 4 (TOP2: 73%) residents believe that they receive good or very good value of programs and services from the City for their tax dollars.



Nearly 3 in 4 (TOP2: 73%) residents say they receive an overall good value of City programs and services for their tax dollars, with more than 1 in 10 (14%) saying they received a 'very good' value.

Around 1 in 4 (BTM2: 25%) of residents say they receive an overall poor value of City programs and services for their tax dollars, with nearly 1 in 10 (8%) saying they received a 'very poor' value.

Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall, you get a very good, good, poor, or very poor value for your tax dollars?
Framework: All respondents
Sample Size: 2023 (n=507); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

Value for Tax Dollars - Benchmarks

73% of City of London residents say they receive an overall good value for their tax dollars – which is less than the mean score of 9 Canadian municipalities.

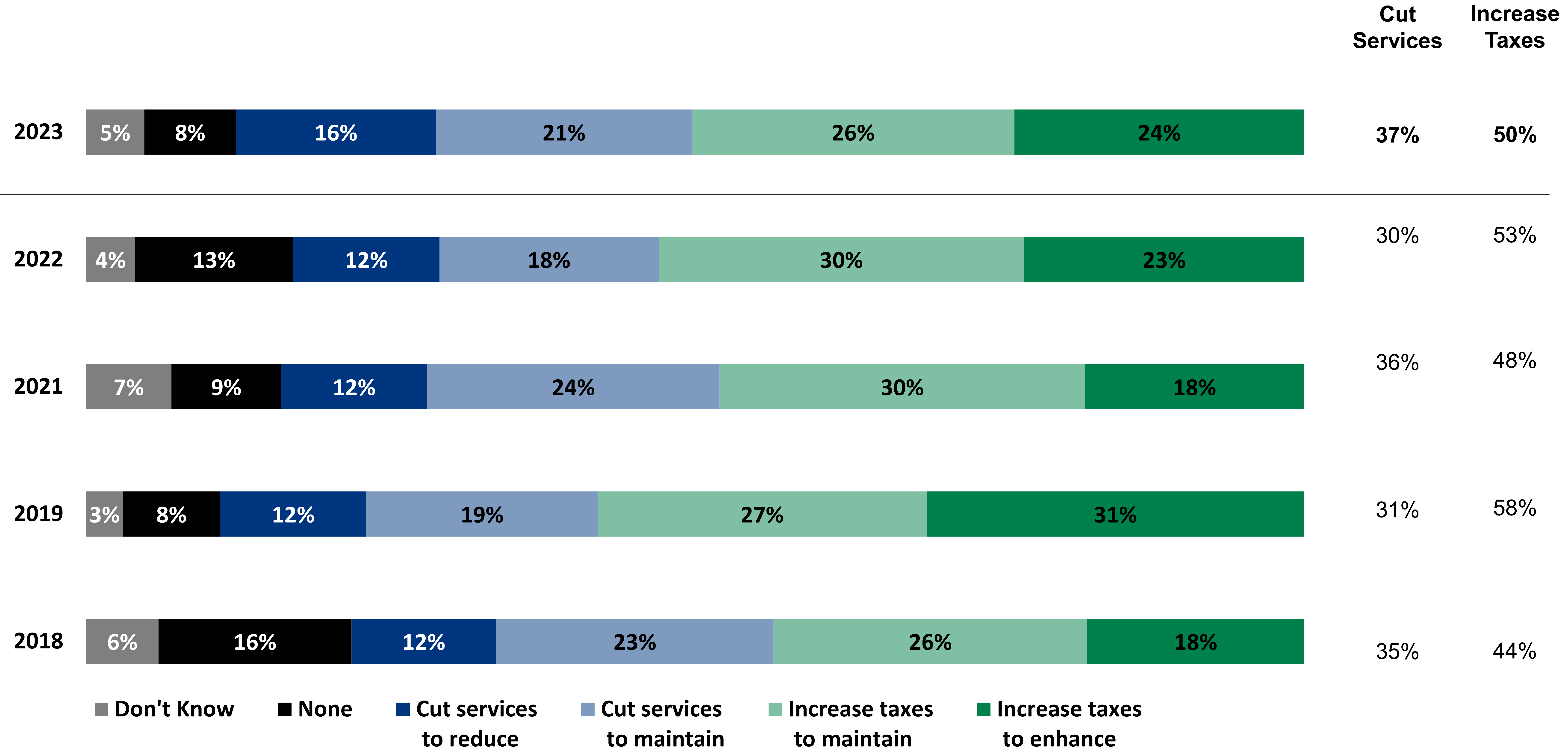
When compared with other municipalities, the City of London's score of 73% who say they receive good or very good value for their tax dollars is below that of the mean score of other Canadian municipalities.

*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2022-2023. Comparisons for this question include 8 municipalities across Canada, with populations ranging from ~50,000 to ~1,100,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall you get a very good, good, poor, or very poor value for your tax dollars?
Framework: All respondents
Sample Size: n=497

Balance of Taxation and Services

More residents would prefer for the City to increase taxes (50%) than cut services (37%) to help the City balance taxation and service delivery levels. Around 1 in 4 (26%) would specifically prefer to increase taxes to maintain the current service levels.

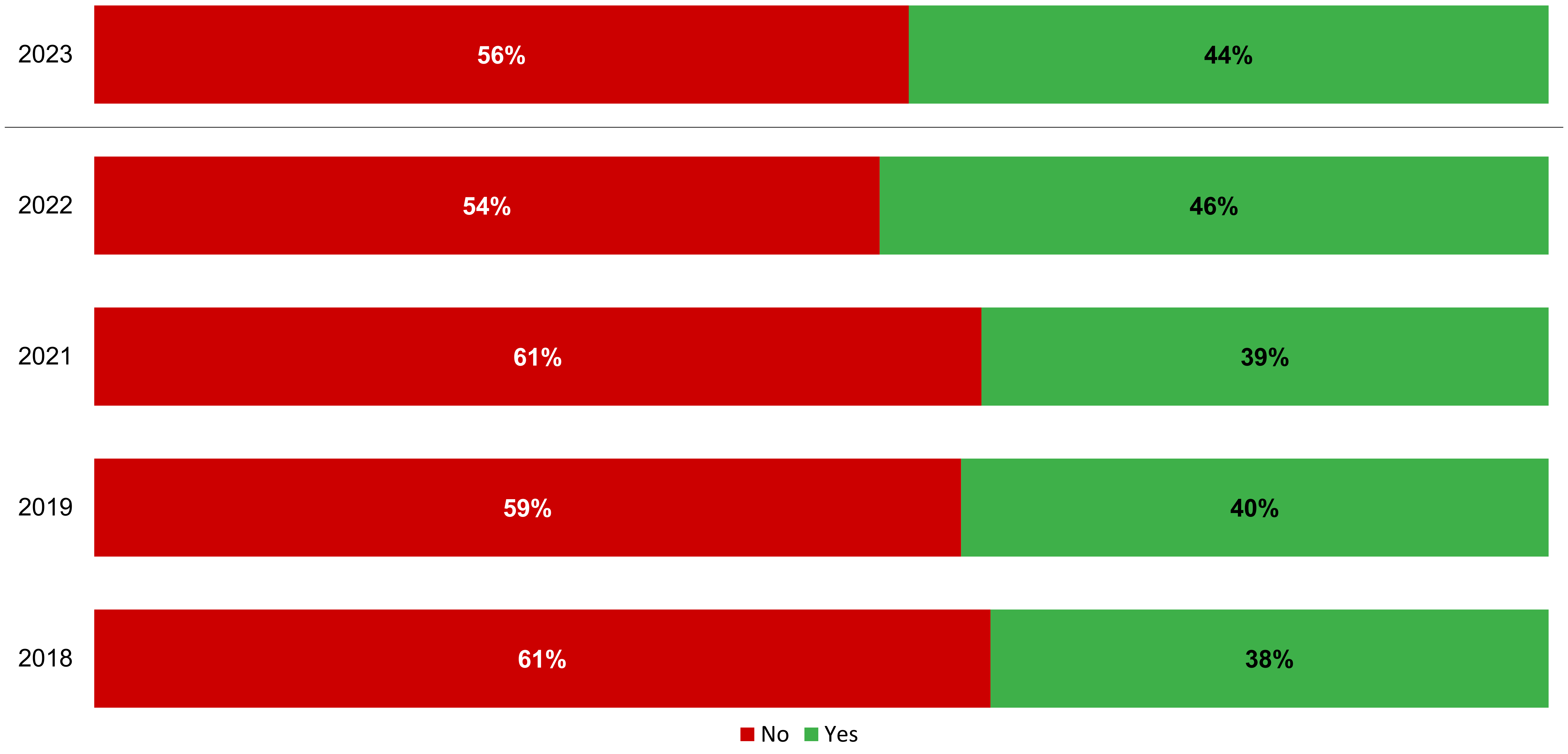


Q7. Municipal property taxes are the primary way to pay for services provided by the City of London. To help the City of London balance taxation and service delivery levels, which of the following four options would you most like the City of London to pursue?
Framework: All respondents
Sample Size: 2023 (n=507); 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500)

Experience with City Staff

Contact with City in Last 12 Months

Nearly half (44%) have personally contacted or dealt with the City in the last 12 months.



Those earning more than $100,000 (64%) contact the City more than those earning less than $50,000 (36%) or those who earn $50,000 to $100,000 (48%).

Residents who have children (59%) are also more likely to contact the City than those who don't (44%).

Residents who don't think that London is a welcoming community (63%) are more likely to contact the City than those who do (42%).

Overall, 2022 has the highest level of residents reaching out to the City compared to all other years.

Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Framework: All respondents;
Sample Size: 2023 (n=507); 2022 (n=500); 2021 (n= 508); 2019 (n=500); 2018 (n=500)

Contact with City in Last 12 Months

Nearly half (44%) have personally contacted or dealt with the City in the last 12 months.

Those who have completed college/tech (55%) and postgraduate degrees (60%) are more likely to contact the City than those who completed elementary/some high school (24%), were high school graduates (38%) or completed some college (27%).

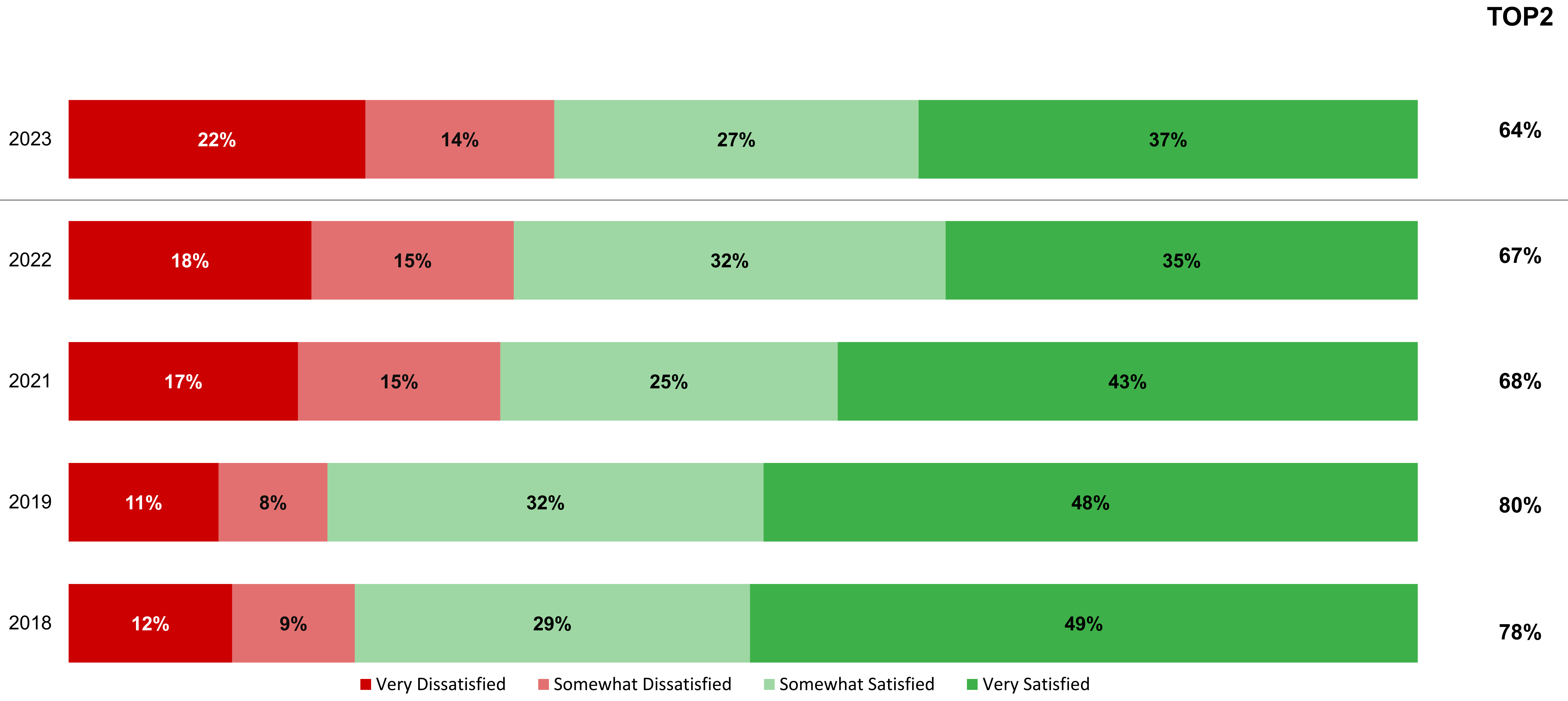
Contacted with City in the last 12 months (% who said Yes)

Total	Gender		Age			Income			Education					
	Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College/ Tech/ Uni	Comp. College/ Tech	Comp. Uni	Comp. Post Grad
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
44%	47%	41%	39%	52%	43%	41%	49%	55%	24%	38%	27%	55% IJK	43%	60% IJK

Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Framework: All respondents
Sample Size: n=507

Overall Satisfaction with City Staff

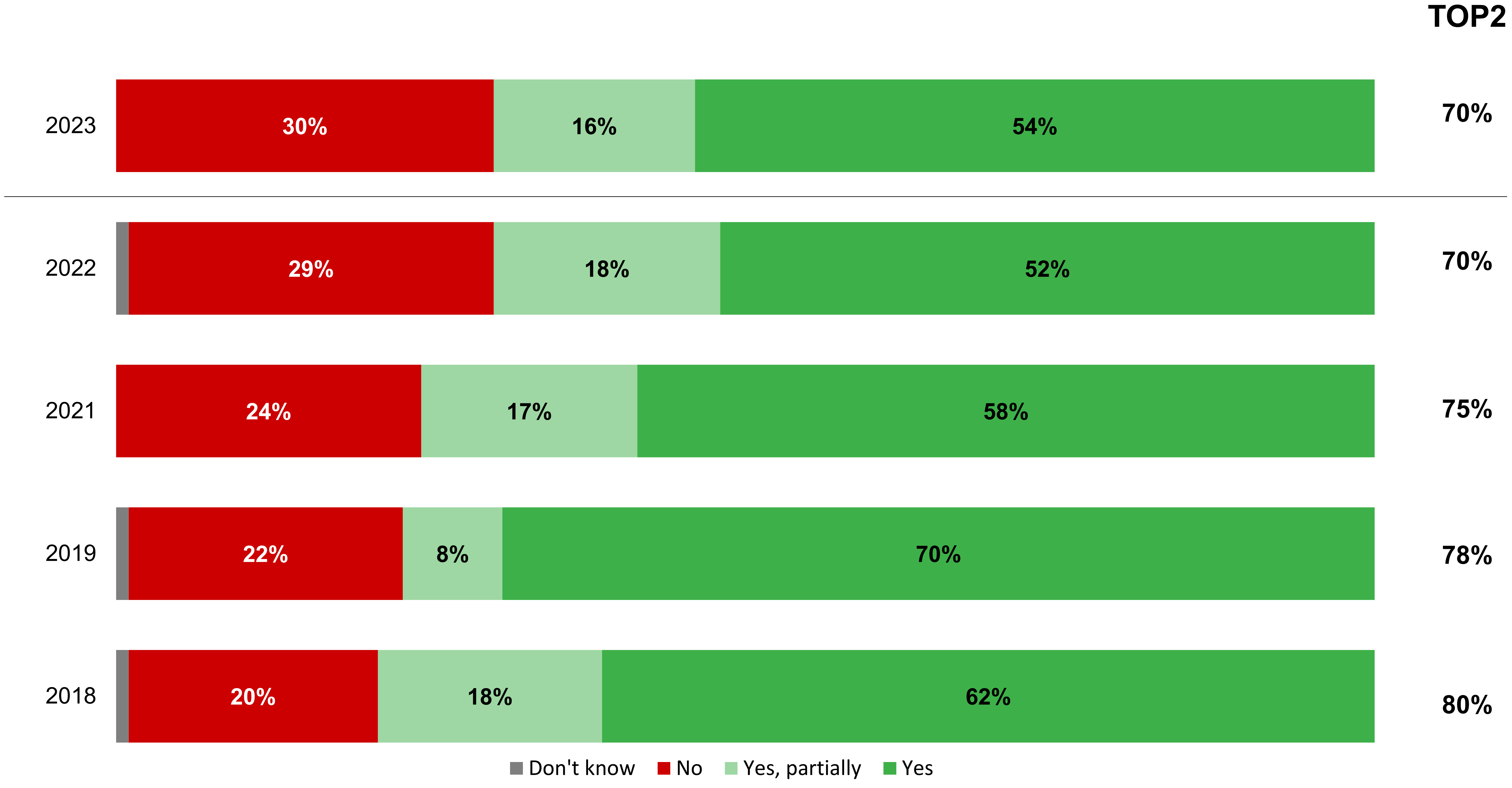
About two-thirds (TOP2: 64%) of residents who contacted the City were satisfied with the overall service they received.



Q9. And thinking of the last time you contacted the City of London, how satisfied were you with the overall service you received? Would you say you were…?
Framework: Contacted the city (Yes to Q8);
Sample Size: 2023 (n=225); 2022 (n=222); 2021 (n=200); 2019 (n=199); 2018 (n=192)

Received Needed Service or Support

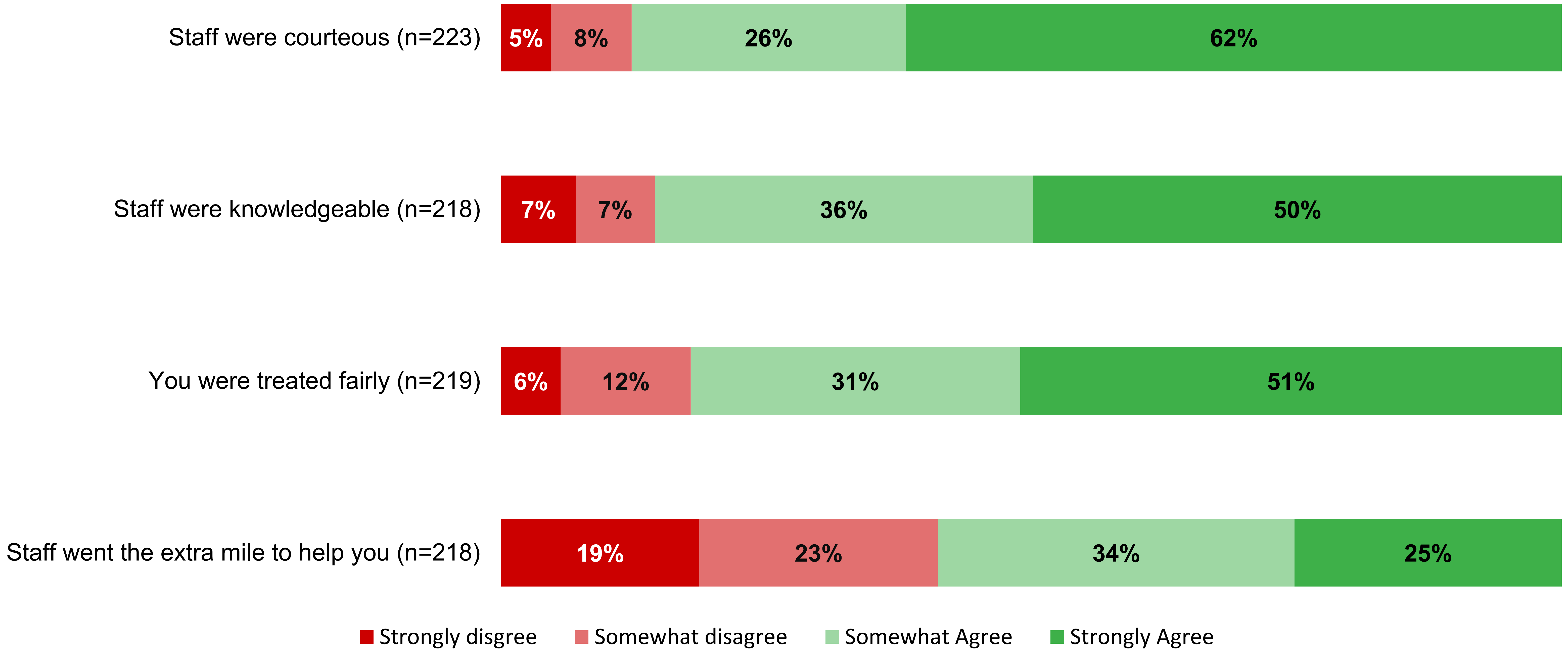
Over 1 in 2 (54%) who contacted the City received all of the service or support they needed.



Q10. In the end, did you receive the service or support you needed?
Framework: Contacted the city (Yes to Q8);
Sample Size: 2023 (n=224); 2022 (n=222); 2021 (n=200); 2019 (n=199); 2018 (n=192)

Satisfaction of Service Experience

Of the residents who contacted the City, more than 4 in 5 (TOP2: 88%) thought the staff were courteous, that staff were knowledgeable (TOP2: 86%) and that they were treated fairly (TOP2: 82%).



TOP2

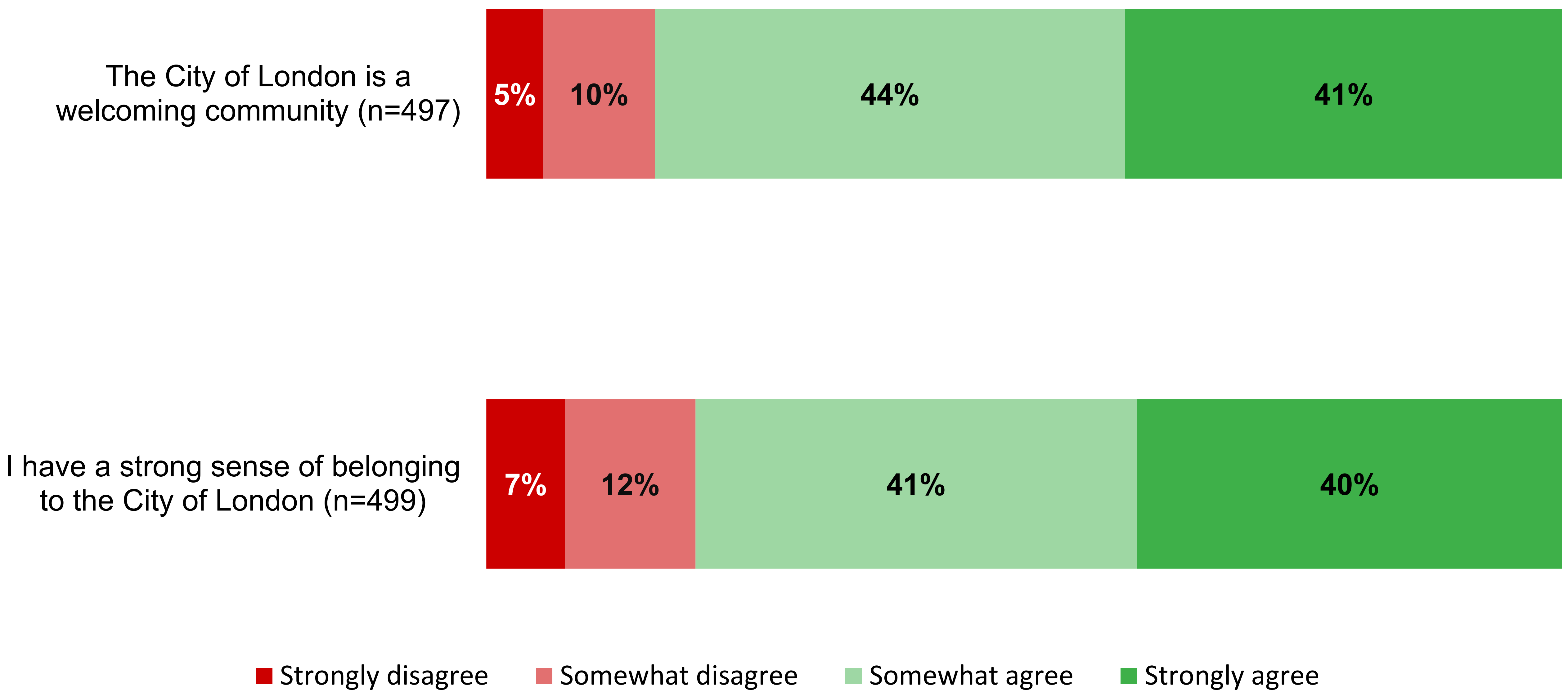
	2023	2022	2021	2019	2018
Staff were courteous	**88%**	81%	87%	92%	90%
Staff were knowledgeable	**86%**	79%	80%	83%	82%
You were treated fairly	**82%**	81%	83%	86%	83%
Staff went the extra mile to help you	**59%**	52%	55%	69%	67%

Q11. Continuing to think about your most recent experiences with the City of London, would you say that you strongly agree, somewhat agree, somewhat disagree, or strongly disagree that…?
Framework: Contacted the city (Yes to Q8)
Sample Size: Shown in chart above; varies for each area

Welcoming & Belonging

Welcoming & Belonging

More than 4 in 5 residents believe that London is a welcoming community (TOP2: 84%) and that they have a strong sense of belonging to the city (TOP2: 81%).



TOP2

	2023	2022	2021	2019
The City of London is a welcoming community (n=497)	**84%**	81%	85%	90%
I have a strong sense of belonging to the City of London (n=499)	**81%**	79%	82%	88%

W1A/B. Please rate the extent to which you agree or disagree with the following statements:
Framework: All respondents
Sample Size: Shown in chart above; varies for each area

Welcoming & Belonging

	Total (TOP2)	Gender		Age			Income			Education					
		Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College / Tech/ Uni	Comp. College /Tech	Comp. Uni	Comp. Post Grad
		A	B	C	D	E	F	G	H	I	J	K	L	M	N
The City of London is a welcoming community (n=497)	84%	84%	85%	93% D	75%	85% D	86%	83%	87%	95%	90%	76%	87%	84%	79%
I have a strong sense of belonging in the City of London (n=499)	81%	75%	86% A	83%	72%	85% D	80%	80%	82%	89% M	82% M	61%	83% M	81% M	84% M

Residents aged 18 to 34 (93%) and 55 or older (85%) are more likely to agree that the City of London is a welcoming community, compared to residents aged 35 to 54 (75%).

Residents aged 55 or older (85%) are more likely to strongly agree that they have a strong sense of belonging in the City of London, compared to residents aged 35 to 54 (72%).

W1A/B. Please rate the extent to which you agree or disagree with the following statements:
Framework: All respondents
Sample Size: Shown in chart above; varies for each area

Demographics

Demographics

Gender	Forum Survey (2023)	StatsCan Census (2021)
Male	47%	49%
Female	49%	51%
Transgender	<1%	N.A.
Gender non-conforming	<1%	N.A.
Not listed / Prefer not to respond	3%	N.A.
Age		
18-34	30%	32%
35-54	31%	30%
55 and over	37%	38%
Prefer not to respond	2%	N.A.
Education Level (highest completed)		**StatsCan Census (2021)**
Less than High School	1%	15%
High School/Equivalent	20%	27%
College/Technical School	30%	29%
University/Postgraduate	46%	29%
Identify as a Person with a Disability		**StatsCan Study (2017)**
Yes	15%	27%
No	83%	73%
Prefer not to respond	2%	N.A.

Children <18 Living at Home	Forum Survey (2023)	StatsCan Census (2021)
Yes	24%	30%
No	73%	70%
Prefer not to respond	3%	N.A.
Household Income		
Less than $25,000	12%	29%
$25,000 to $49,999	23%	33%
$50,000 to $74,999	16%	28% (total for $50,000 – $99,000)
$75,000 to $99,999	11%	
$100,000 to $149,999	11%	6%
$150,000 or more	11%	3%
Prefer not to respond	16%	N.A.
Race/Ethnicity		
White	68%	78%
East/Southeast Asian	8%	3%
Indigenous	2%	1%
Black	5%	4%
South Asian	5%	7%
Middle Eastern	4%	5%
Latino	3%	3%
Other / Prefer not to respond	9%	N.A.

Note: Gender and age percentages represent residents 18 years of age and older. Education, ethnicity, income and disability percentages represent residents 15 years of age and older. 'Children <18 living at home' percentages represents proportions of households.

StatsCan Sources: Statistics Canada. Census Profile, 2021 Census; and Canadian Survey on Disability (2017).