

TO:	CHAIR AND MEMBERS STRATEGIC PRIORITIES & POLICY COMMITTEE MEETING ON DECEMBER 16, 2013
FROM:	ART ZUIDEMA CITY MANAGER
SUBJECT:	2013 COMMUNITY SURVEY

RECOMMENDATION

That, on the recommendation of the City Manager, this report with respect to a survey of Londoners as conducted by Environics Research Group **BE RECEIVED** for information.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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- Corporate Services Committee – February 5, 2013

BACKGROUND

City Council and Civic Administration use many tools to understand the needs, wants and aspirations of the London community. Surveys are one such tool that can provide insight on the views of Londoners. An annual community survey was first discussed in 2011 as a part of Council’s strategic planning process. An annual survey was also identified as deliverable in the Council-endorsed Service London Implementation Plan in 2012.

Environics Research Group conducts a standard semi-annual survey called “Focus Ontario” in several large Ontario municipalities. The City of London participated in this survey for the first time in Fall 2012, and again in Fall 2013. Environics develops standardized survey questions, conducts the survey, analyzes the results, and prepares a final report for participating municipalities. The City of London’s Fall 2013 report is attached as Appendix A. The survey was conducted from October 23 to November 1, 2013 as an online study with a sample of 501 residents of London. Environics set quotas for age, gender and income in order to ensure that the sample would be representative of the general population.

The Fall 2013 survey asked many of the same questions as in Fall 2012, with customization in two areas: (1) the questions regarding specific services were tailored to match the City of London’s services; and (2) specific questions were added with respect to Londoners’ preferred channels of communication and service delivery, as this information informs Service London implementation.

A number of themes arose from the 2013 survey results:

1. **The economy remains the top local issue for Londoners, but the community feels more optimistic about the economy than a year ago.** In 2012, 45% of respondents indicated that the economy was the most important local problem facing London; in 2013, this number has dropped to 38%. The 2013 survey identifies that 65% view the economy as stable or getting stronger.

2. **The quality of life in London remains high.** 82% of survey respondents rated their quality of life in London as good or excellent. This is an increase from 77% in 2012.
3. **Londoners are concerned about their local government.** The 2013 survey shows a decline in satisfaction with local government. In 2012, 46% indicated being somewhat or very satisfied, and this figure dropped to 32% in 2013. Dissatisfaction is more pronounced with age. The 2013 survey indicates that 50% of those aged 18-29 are somewhat or very satisfied with local government, whereas only 20% of those aged 55 and over are somewhat or very satisfied.
4. **In general, Londoners feel that they receive value for tax dollar, but hold differing views with respect to taxation.** 60% of survey respondents identified that they receive fairly good or very good value for their local tax dollar. More than half (53%) of survey respondents would like to see taxes increased to maintain, expand or improve services. Priorities for increased spending include roads, long-term care, economic development, public health, children's services, transit and housing.
5. **Londoners generally agree with how the City spends money on services.** In 86% (31 of 36) services surveyed, the majority of citizens felt the City should spend 'about the same' to deliver the identified service.
6. **Awareness about City services has improved.** In 2012, only 54% of survey respondents indicated that they had used a City of London service in the past year. In reality, all Londoners use services like roads, water and sewers every day. In the 2013 survey, the percentage that identified having used a City service increased to 71%. This may be in part because of the City's continued efforts to communicate about services, and in part a result of the survey design. One of the customized areas of the 2013 survey was to change the general list of services used in the 2012 survey to a list of City of London specific services. Respondents would have just completed the questions about more than 30 services before answering whether they had used a local service in the past year, so the results are not directly comparable.
7. **Online services and phone communications are priorities.** More than half of survey respondents (64%) would like to conduct business online with the City. Phone (49%), email (31%) and online (27%) are preferred means to contact the City with a question. Closing the loop is important, and there is an interest in neighbourhood specific communications. These channel and communications specific questions are a key information element for the ongoing implementation of Council's Service London plan, and will be used to prioritize resource allocation going forward.

CONCLUSIONS

Community surveys remain a useful tool to obtain insights on the views of Londoners. The survey aims to provide a current picture of how Londoners feel about various topics. Survey results coupled with insights obtained through other tools such as community engagement processes, social media and general feedback all contribute to an understanding of the current and future needs and expectations of Londoners, and help us to be At Your Service.

The 2013 survey suggests improvement in perceptions about the economy, and affirms that quality of life and value for tax dollar in London remains high. It also identifies areas of concern.

Council continues to invest in several initiatives which will result in improvement in all areas in the future, including all elements of the Service London plan (as detailed in a report under separate cover), as well as other engagement and communications initiatives underway.

Going forward, regular community surveys will continue to both inform these strategies and serve as a way to measure their results. Regular reports will be provided to Council as this work proceeds.

PREPARED BY:	RECOMMENDED BY:
KATE GRAHAM MANAGER, CORPORATE INITIATIVES	ART ZUIDEMA CITY MANAGER

- cc. Senior Leadership Team
- Operations Management Team
- Lynne Livingstone, Managing Director, Neighbourhood, Children's and Fire Services
- Rosanna Wilcox, Manager, Service London
- Jay Stanford, Director, Environmental Programs and Solid Waste
- Joseph Edward, Chief Technology Officer