Focus Ontario Fall 2013
London Edition

ENVIRONICS
RESEARCH GROUP

Key insights

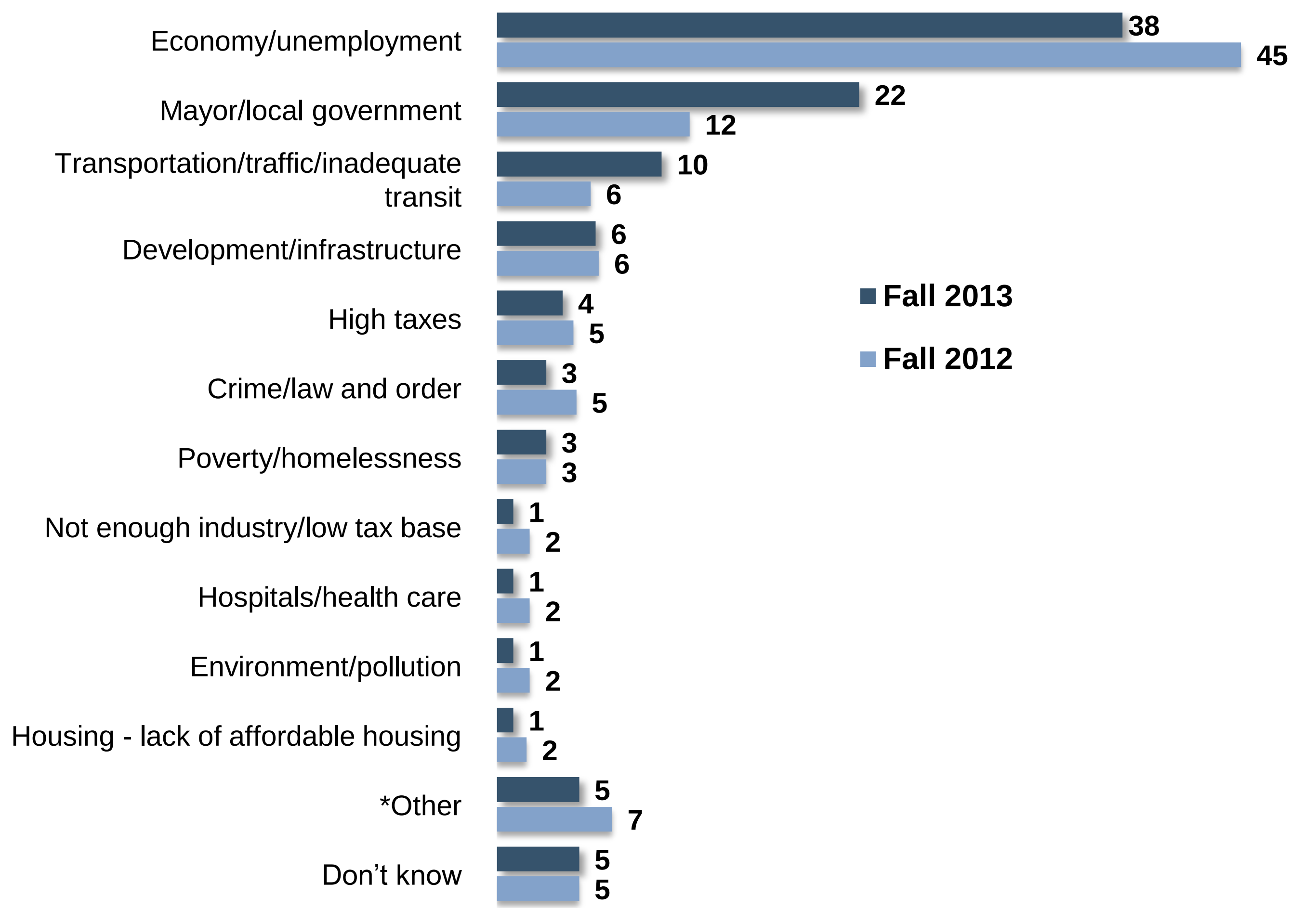
- In the year since the Fall 2012 wave of Focus Ontario, many views of London residents have remained consistent: the economy and unemployment remain the most pressing problems, residents' outlook on their personal financial situations are similar, and perceptions of quality of life and value for tax dollars are relatively unchanged.
- One important change from 2012 is the sharp decrease in satisfaction with the local government. Dissatisfaction is particularly high among older residents.
- A new topic covered in the 2013 edition is residents' preferences for communications with the City government:
  - Residents would like to do business with the City online, but when they have a question or concern, they prefer to talk to a person over the phone.
  - Social media could be an effective tool for communicating with younger residents.
  - There is a lot of interest in receiving neighbourhood-specific information from the City.
  - Nearly all residents agree that it is important that the City "closes the loop" on all complaints and concerns.

Most important issue

Key insights

- The economy and unemployment remain the most important issues for London residents; however, concern about this topic has decreased from last year (currently 38%, was 45% in 2012).
- The proportion of residents who see the performance of their local government and mayor as the most important problem has increased 10 points since 2012, to 22 percent.
- Residents aged 55 and older are the most likely to have concerns about the performance of the local government, as one in three (34%) say it is the biggest problem facing the City.
- Transportation issues such as traffic congestion and inadequate public transit are now the top problem for one in ten (10%).

Most important local issue
2012 - 2013



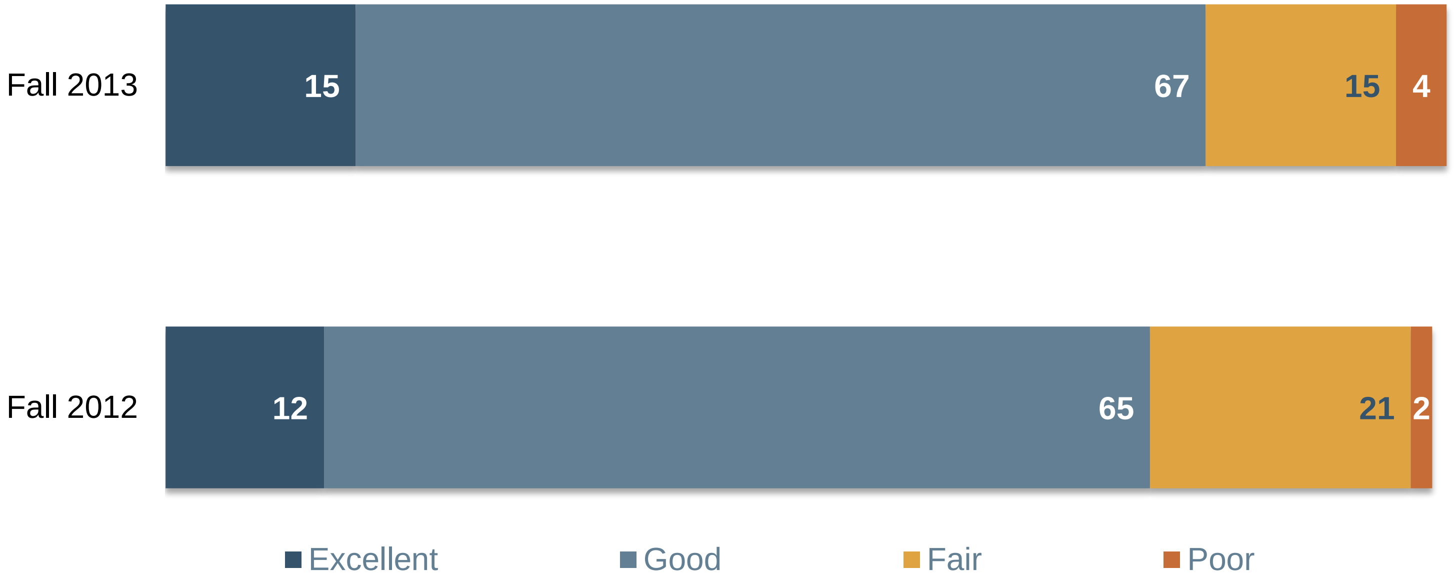
Q1 What, in your opinion, is the single most important local problem facing London today?
**Other contains a number of responses of one percent or less each*

Quality of life

Key insights

- Eight in ten residents (81%) perceive the quality of life in London to be excellent or good.
- There is little change in the perception of the quality of life compared to the fall of 2012.
- Perceptions of quality of life are closely tied to the performance of the local government, as residents who feel they receive good value for their tax dollars are more likely to say that the quality of life in London is excellent or good.

Quality of life rating
2012 - 2013



Q2 Overall, how would you rate the quality of life in your municipality?

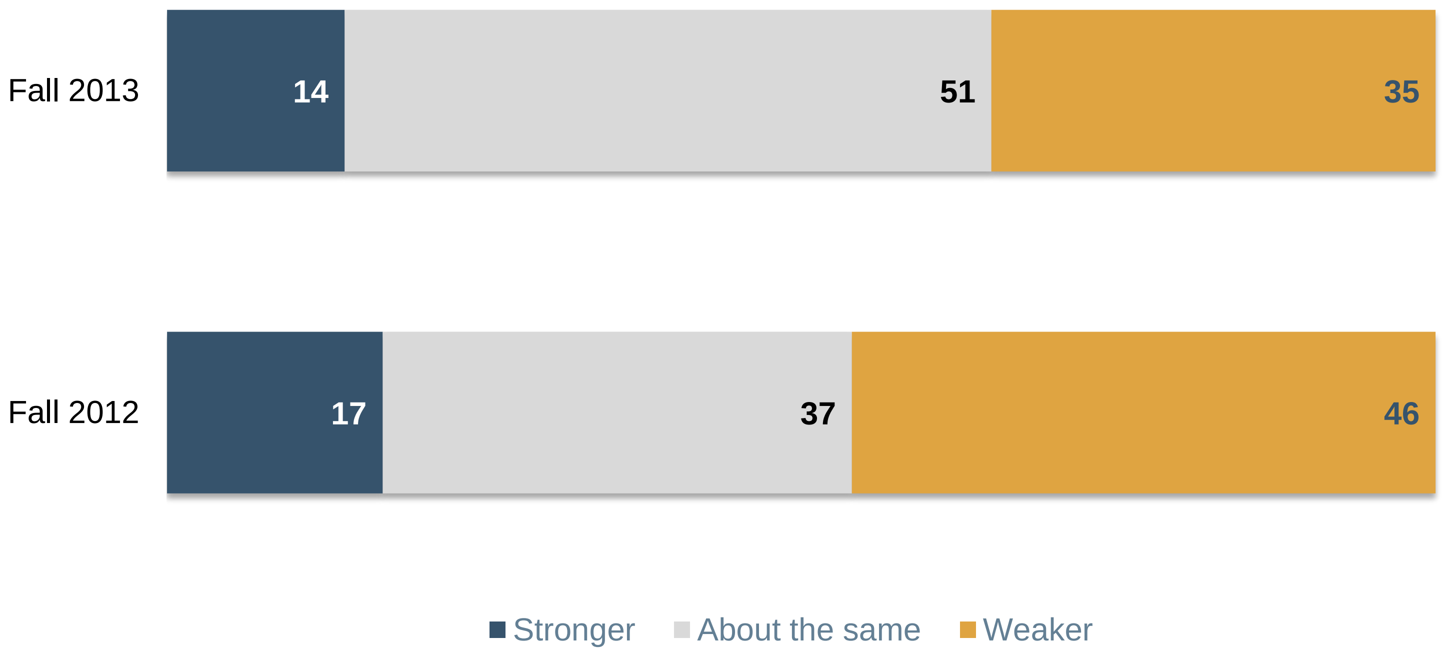
Local economy

Key insights

- While not quite optimistic about the local economy, the proportion of London residents who feel that the economy is getting weaker has decreased from nearly half (46%) in 2012, to one in three (35%) in 2013.
- Half (51%) say that the local economy is remaining stable, while one in seven (14%) believe that it is getting stronger.
- Compared to 2012, residents' perceptions of their own finances are relatively unchanged.
- Two in ten (18%) say that their personal financial situation is better than it was six months ago, and three in ten (30%) expect their situation to improve in the next year.
- Residents aged 45 and older are the most pessimistic, as one in four (23%) expect their financial situation to decline over the next year.

Local economy
2012 - 2013

Perceptions of state of local economy

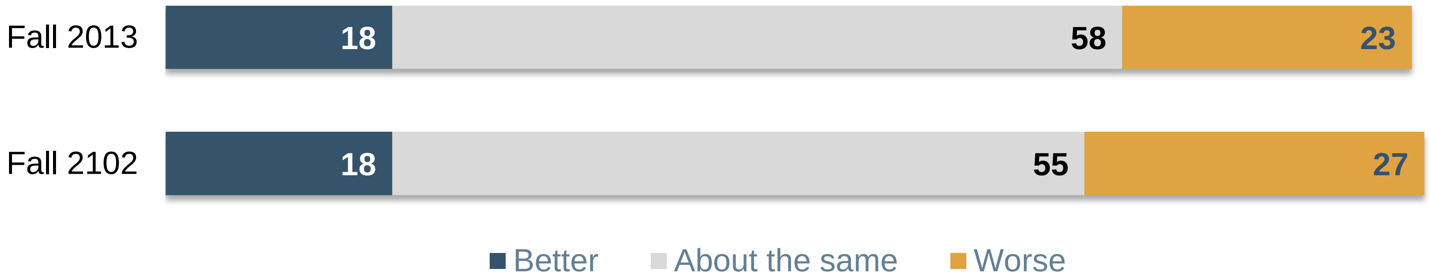


Q3 In your opinion, is the economy in your region getting stronger, weaker or is it staying about the same?

Personal finances

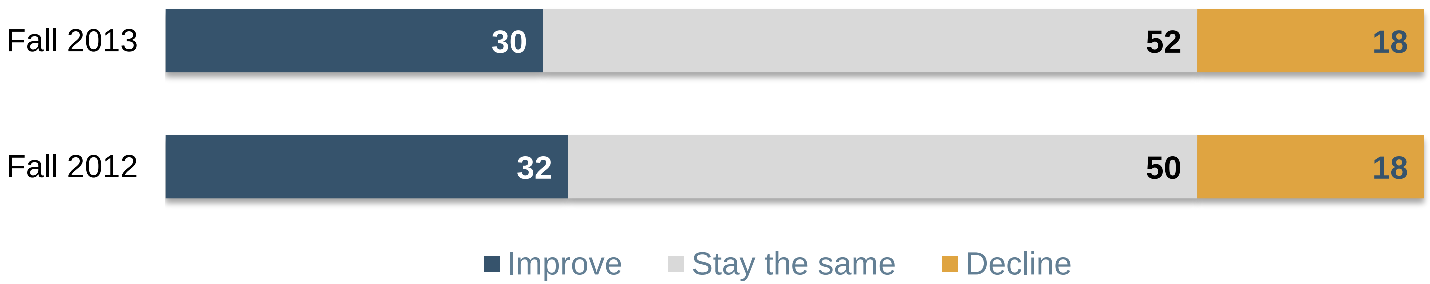
2012 - 2013

Personal financial situation compared to six months ago



Q4 Generally speaking, would you say that your personal financial situation today is better, worse, or about the same as it was six months ago?

Future expectations for personal financial situation



Q5 Do you think your financial situation will improve, decline or stay the same over the next year?

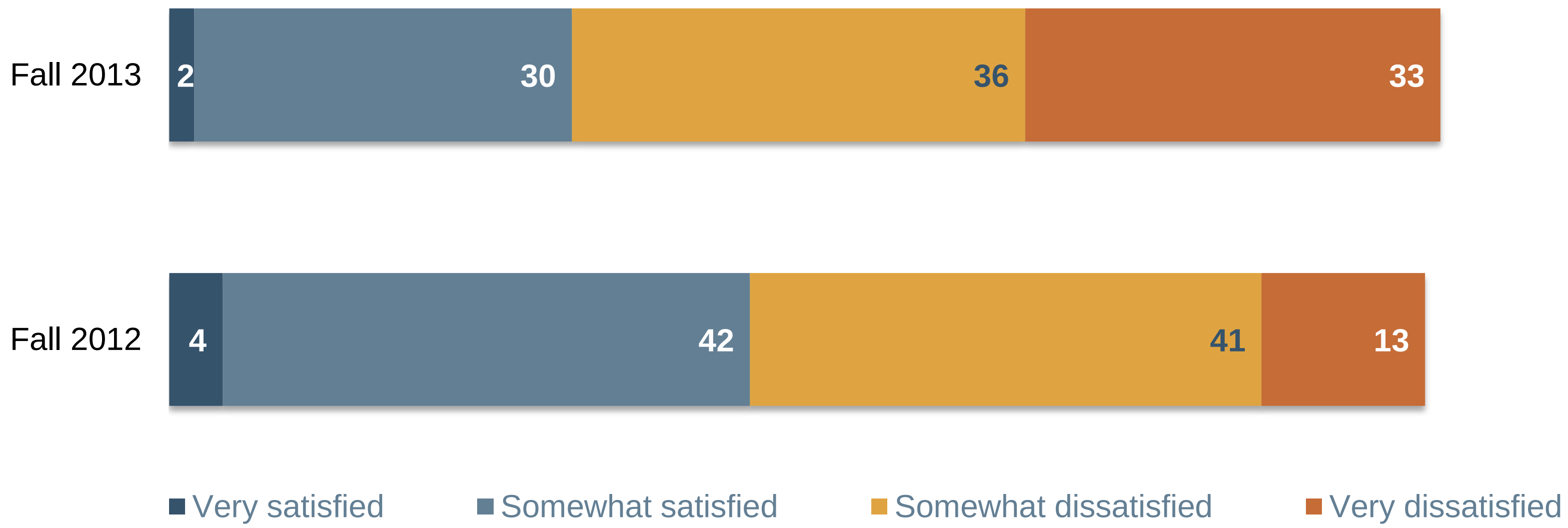
Local government

Key insights

- Satisfaction with the local government is low, as two in three residents say they are somewhat (36%) or very dissatisfied (33%) with its performance.
- The proportion of residents who are very dissatisfied has increased by 20 points in the past year (was 13% in 2012, currently 33%).
- Older residents are much more likely to be displeased with their local government's performance; eight in ten of those aged 55 and older are dissatisfied, while residents aged 18 to 29 are split evenly between satisfaction and dissatisfaction (50% each).

Satisfaction with local government
2012 - 2013

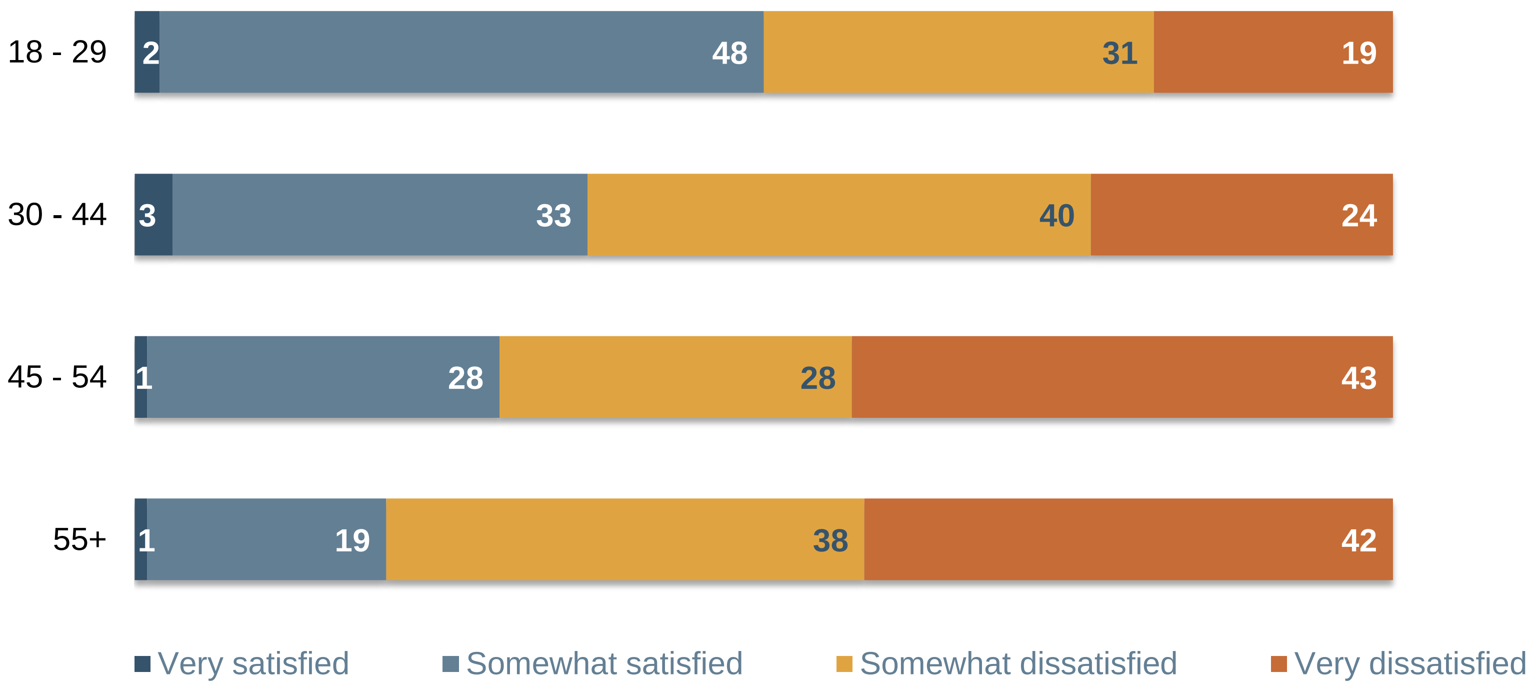
Satisfaction with municipal government



Q6 Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with the London government?

Satisfaction with local government
By age

Satisfaction with municipal government



Q6 Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with the London government?

Services and taxation

Key insights

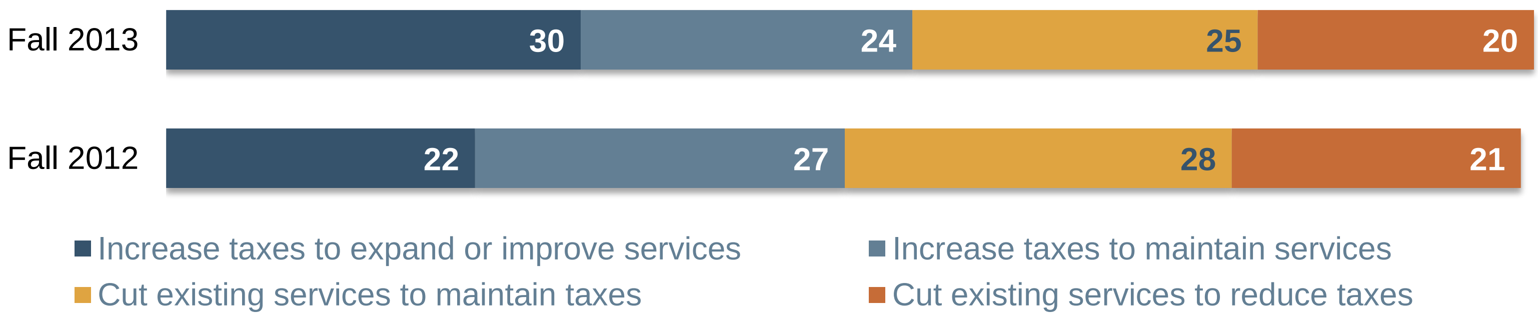
- Perceptions of value for tax dollars among London residents are relatively unchanged in the past year, as six in ten (60%) continue to say the value they receive is good.
- A slight majority of residents (53%) now say that they would like to see taxes increased in the City, rather than have services cut. The proportion of residents who would like to see services increased through additional tax revenue has grown to three in ten (compared to 22% in 2012).
- For specific services, residents would like to see more spending on roads (51%), long-term care facilities (44%), economic development (39%) and public health (37%).
- Three in four residents (76%) say that the City should spend less on golf, while four in ten or more say spending should decrease on special events (45%), arts and culture (44%), heritage buildings and landscapes (41%), and parking (41%).
- Residents are either using more City services, or are more aware of their use, as seven in ten (71%) say they have used a service in the past year, compared to just over half (54%) in 2012.

Services and taxation

Value received for tax dollars

Q7 Thinking about all the programs and services you receive from your municipal government, would you say that, overall, you receive very good, fairly good, fairly poor or very poor value for your tax dollars?

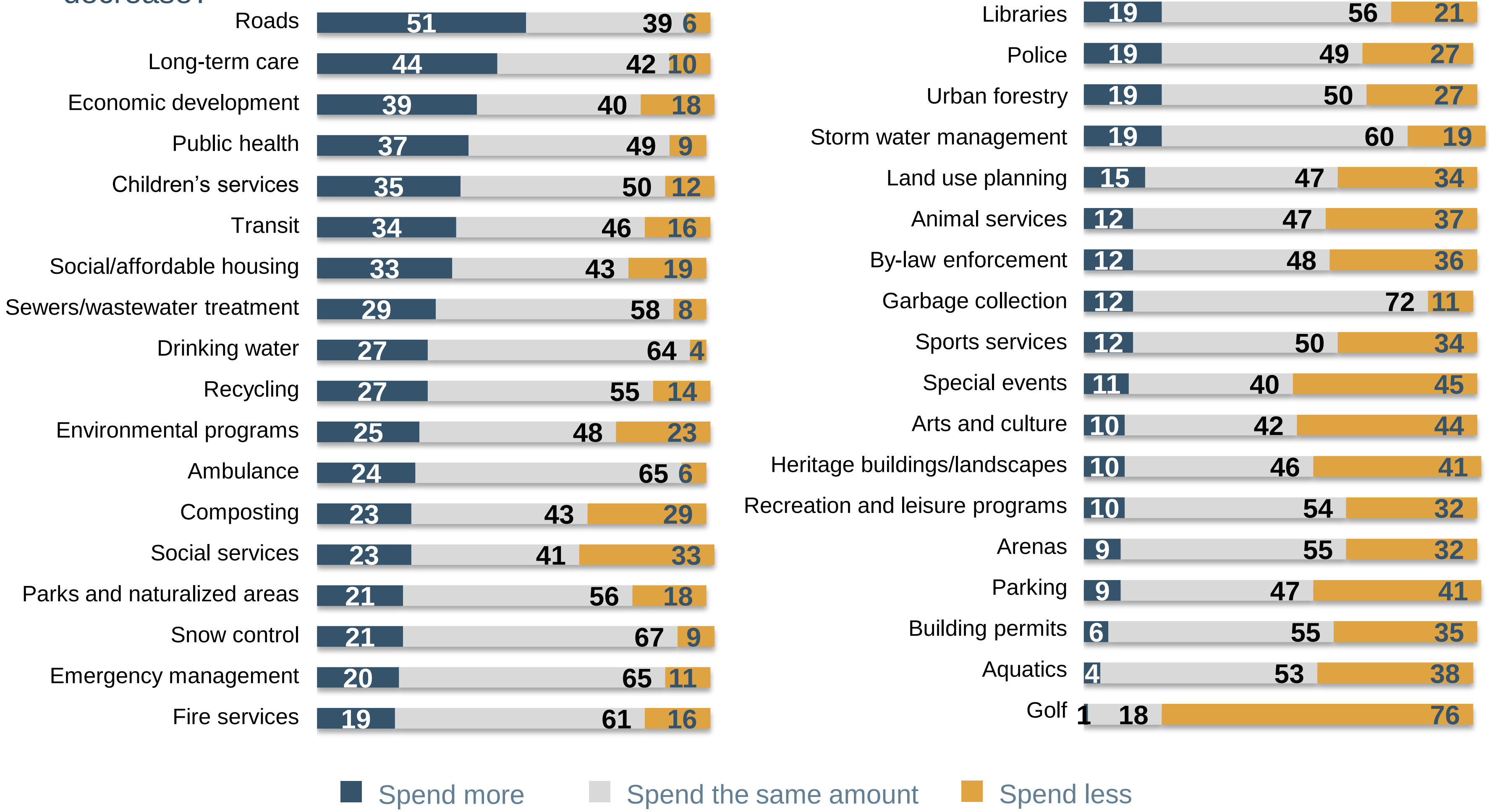
Increase taxes or cut services?



Q8 Local governments must balance the cost of delivering services with taxation. Which of the following options would you most prefer in your municipality?

Local government spending on services

Should spending on services increase or decrease?



Q9 Keeping in mind that taxes may increase if spending increases, do you think that your local government should be spending more, less or about the same as now on each of the following services?

Use of government services
2012 - 2013

Used local services in past year

Q10 Have you used the services of the City of London in the last 12 months?

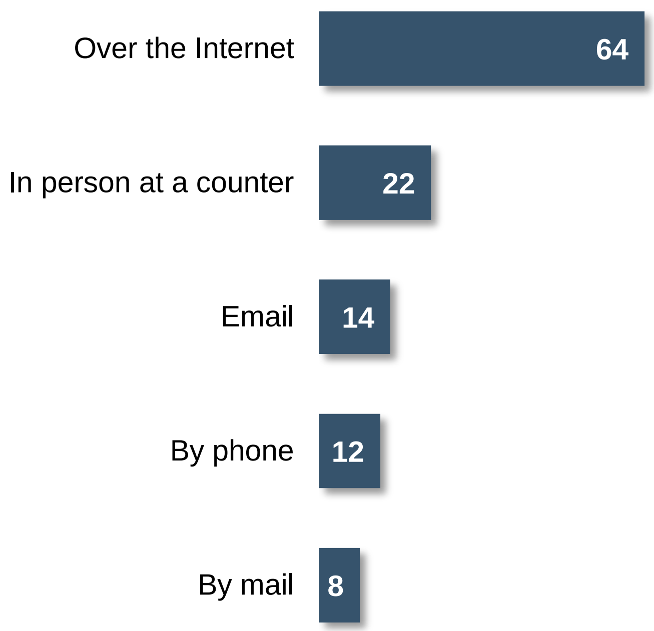
Communications

Key insights

- A majority of London residents prefer to conduct business with the City online (64%), but when they have a question or inquiry, half (49%) want to be able to discuss over the phone.
- Regardless of the mode of communication, nearly all residents (94%) agree that it is important that the City “closes the loop,” and informs residents what steps have been taken to address their concerns or complaints.
- There is no consensus among residents about the best way to receive information from the City, but online, and through local newspapers and television are the most commonly suggested methods.
- Residents of all ages show similar levels of interest in receiving information from the City via email, but those aged 18 to 29 are the most likely to be interested in receiving information through social media.
- More than eight in ten residents (84%) show interest in receiving communications about projects and events that are specific to their neighbourhood.

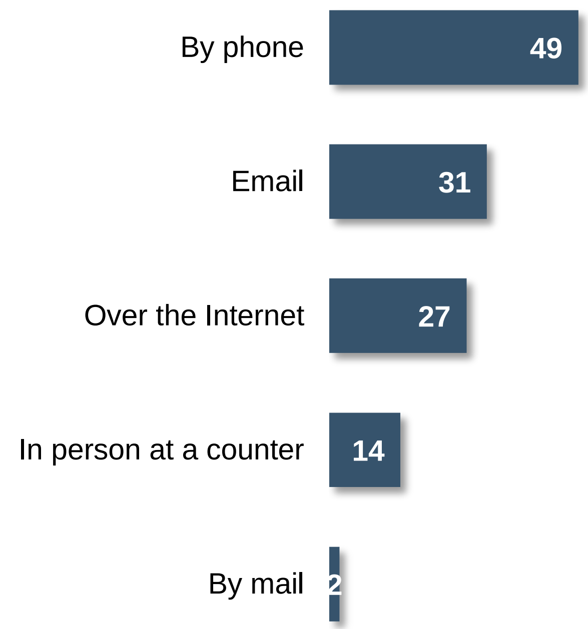
Communications

Preferred method of conducting business with the City of London



Q11 What is your preferred method for conducting business (i.e., bill payments, service registrations, permits and licensing) with the City of London?

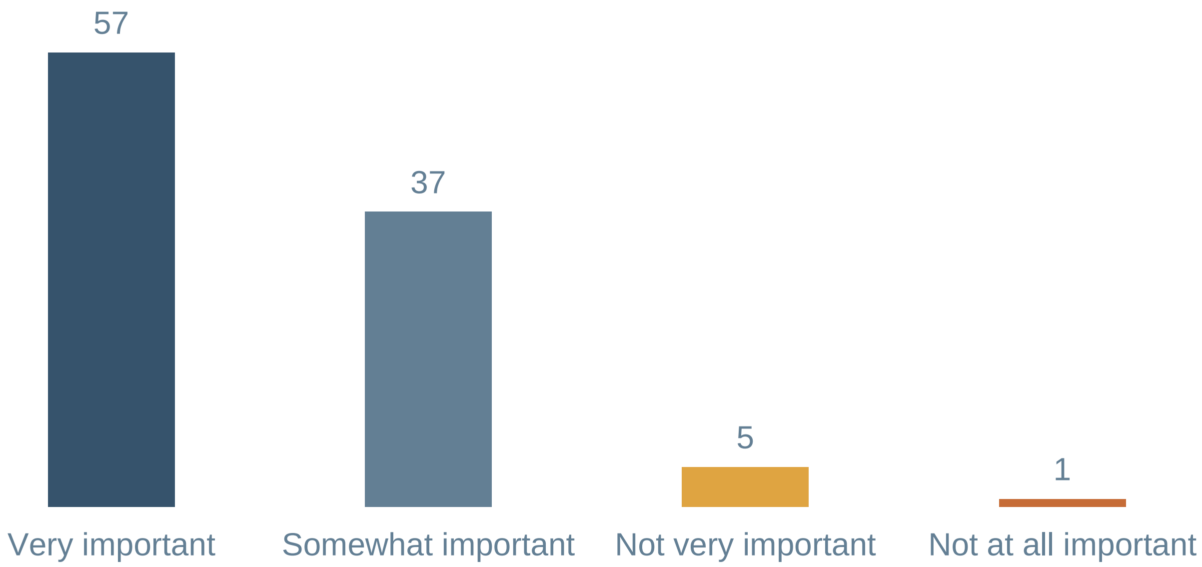
Preferred method of contacting the City of London with a question or inquiry



Q12 What is your preferred method for contacting the City of London with an inquiry or concern?

Communications

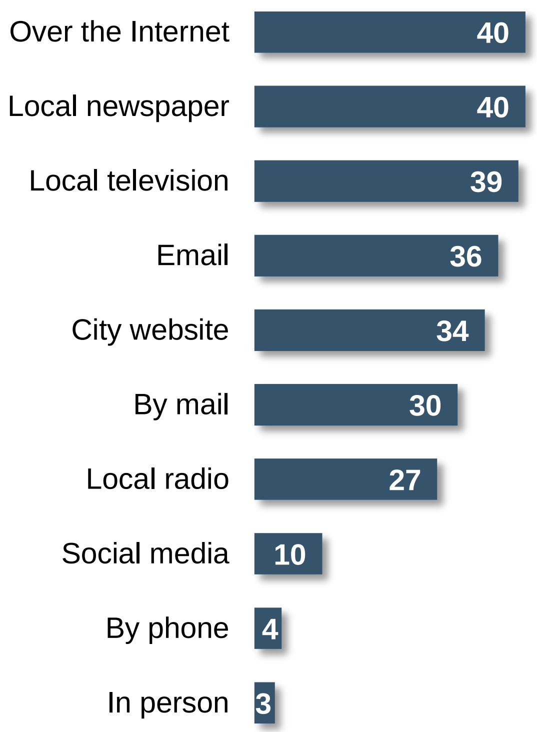
Importance of closing the loop in communications



Q18 How important to you is it that the City of London "closes the loop" on all communications with City staff, by letting residents know what actions have been taken to address their concerns or complaints?

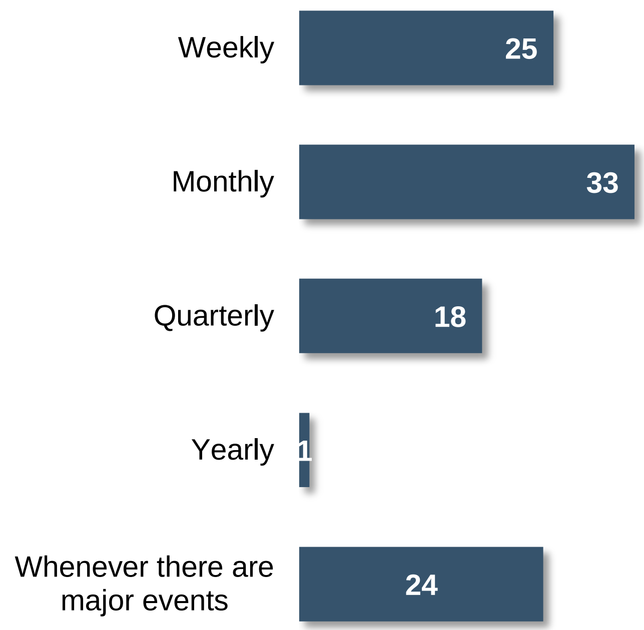
Communications

Preferred method for receiving information from the City of London



Q13 What is your preferred method for receiving news and information from the City of London?

Preferred frequency of information from the City of London



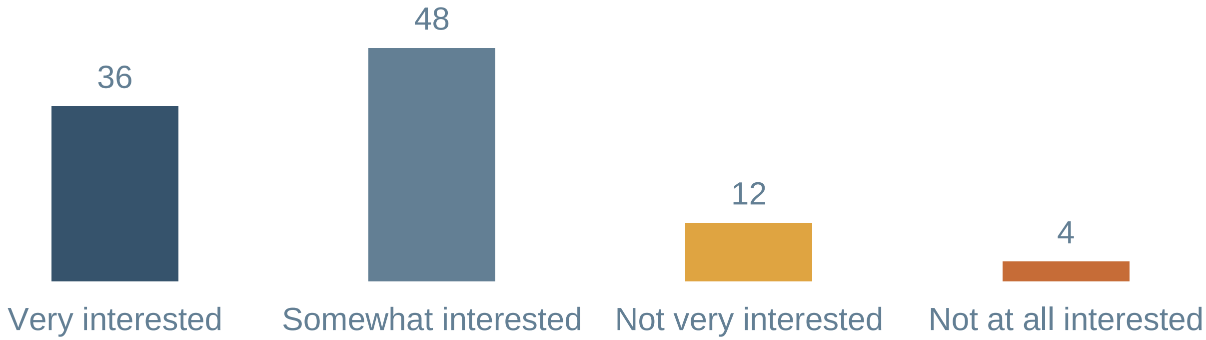
Q14 How frequently would you prefer to receive news and information from the City of London?

Communications

Interest in communications through email and social media

Q15 – 16 To what extent are you interested in getting information about your community, including services, programs and events, through . . .

Interest in neighbourhood-specific communications



Q17 To what extent are you interested in receiving news about projects and events that are taking place in your specific neighbourhood?

Methodology

Method	Online study with residents of London.
Respondents	Results based on 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.
Timing	October 23 – November 1, 2013
Topics covered	Most important local issue, quality of life, the local economy, personal financial situation, satisfaction with local governments and services, value for tax dollars, and preferences for City service spending and City communications.
Note	In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts due to rounding.