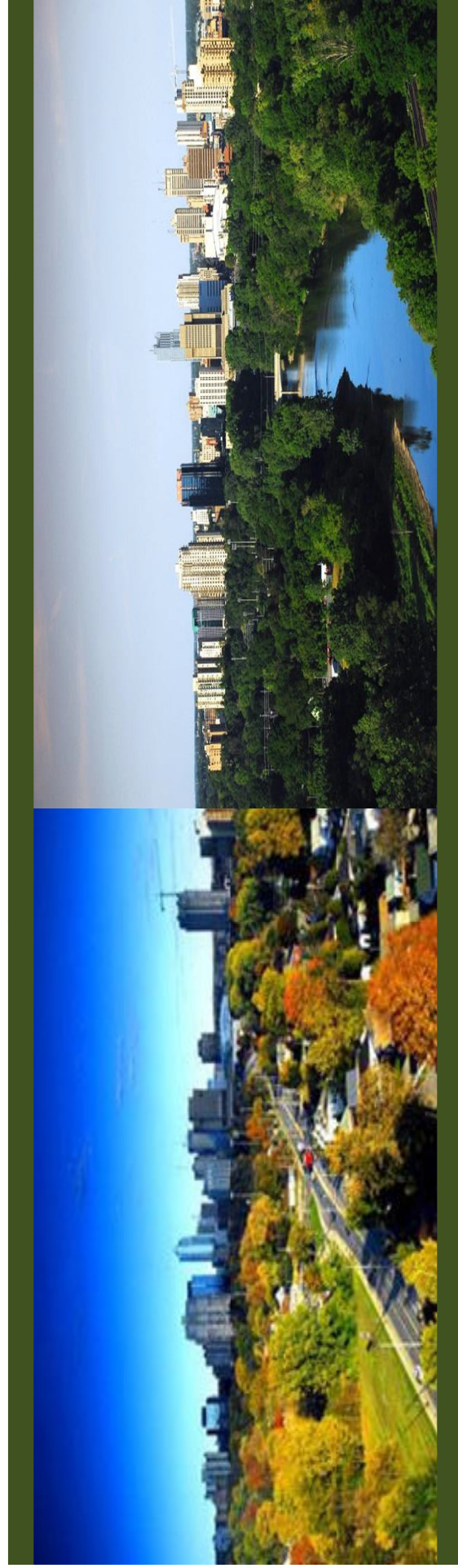




City of London

Citizen Satisfaction Study

Report



August 2015

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Table of Content

Objectives	3
Methodology	4
Key Findings	5
Detailed Findings	8
Most Important Issues	9
Quality of Life	11
City Services Assessment	15
Gap Analysis	22
Value for Tax Dollars	26
Experience and Satisfaction with City Staff	30
Communications	35
Demographic Profile	40
Contact Information	42



Objectives

- Ipsos Reid is pleased to present the City of London with the results of the 2015 Citizen 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 perceived importance and satisfaction;
 - ⇨ Perceptions of value for tax dollar and taxes in general;
 - ⇨ Frequency of contact and satisfaction with City Staff; and
 - ⇨ Preferred communication needs.



Methodology

- This survey was conducted by telephone and the sample was drawn using random digit dialing (RDD) among City of London residents.
- A total of 500 interviews were completed among residents 18 years of age and older.
- The overall survey results have been weighted by age and gender to reflect the population of the City of London.
- A sample of 500 interviews produces results which can be considered accurate within ± 4.4 percentage points, 19 times out of 20. The margin of error will be larger for subgroups. The sample size asked each of the questions is noted after the question wording at the bottom of the graph (denoted by n=).
- This survey was conducted between June 4th to 14th, 2015.
- Throughout the report totals may not add to 100% due to rounding or because the question is a multi-select question, where respondents were permitted to choose more than one response.
- Where possible tracking data has been included. Please note that the previous research was conducted in 2013 online by another vendor. Caution should be used in comparing the online and telephone data because of the methodological differences in the data collection approaches.
- Where possible throughout the report the City of London's findings have been compared to the Canadian National Norm. The Ipsos National Norm is a reliable average that includes all of the Citizen Satisfaction Research Studies that we have conducted across the country within the last 5 years.
- Significant differences across sub-groups are noted where they exist.

Key Findings

Key Findings

Infrastructure, transportation and economic development are top mentions for residents. Significant increase in the number of residents who cite development and infrastructure issues as issues that should receive the greatest attention from the City (21%, up from 6% in 2013). Transportation (13%) and economic development are also seen as a top priority, but significant drop in the number who mention the latter issue (13%, down from 38% in 2013). (see p.10)

Overall quality of life scores on par with National Norm, but lower strongly positive views. Overwhelming majority (95%) of residents believe the quality of life in the City of London is good (on par with the National Norm), but the number who say “*very good*” is significantly lower (31% vs. 46% National Norm). Hence, the City has to work on improving this metric, as most residents offer lukewarm reviews (64% say *good*). (see p.12)

Satisfaction with the level of City services on par with National Norm. Vast majority (92%) are satisfied with the overall level of City services, including 26% who are *very satisfied*. Both figures are on par with National Norm. However, most residents offer lukewarm ratings (66% *somewhat satisfied*), so there is room for enhancing this metric. (see p.16)

Land use planning, economic development, public transit and roads strongest drivers of overall satisfaction. Gap analysis (see pp. 23-25) indicates that the City should focus on land use planning, economic development, public transit and roads, as boosting scores in these areas would have greatest impact on satisfaction with overall level of service.

Significant increase in perception of getting very good value for tax dollars, and now on par with National Norm. Large majority (80%) believe they are getting good value for their tax dollars based on programs and services they receive from the City, and a growing number say they receive *very good* value (21%, up from 3% in 2013). Moreover, this latter figure now on par with National Norm (18%). (see p.27)



Key Findings (Continued)

On balance, residents prefer increased taxes over cutting services, but sizeable number are unsure. When presented with options, most residents prefer increasing taxes (54%) to cutting services (29%). There is some preference for increasing taxes to maintain rather than enhance or expand services (32% vs. 23%), but a clear preference for cutting services to maintain rather than reduce tax levels (21% vs. 8%). Two-in-ten residents struggled to choose between these options and chose none of the above or don't know. This may be connected to uncertainty about the specifics of the tax increase or service cuts. (see p.29)

Majority of residents who had contact with the City are satisfied with their experience. One-third of residents have had contact with the City in the past 12 months (see p.31). Among these, a large majority are satisfied (73%), including 47% who are *very satisfied* (see p.32). These figures are on par with the National Norm. However, it should be noted that though most who had contact report receiving the service or support they needed (60%), 21% say they did not and another 18% say they only received partial service (see p.33).

Mail and e-mail are the most preferred methods of receiving information from the City, but telephone is the clear choice for contacting the City. Regular mail (33%), followed by e-mail (27%) are the most preferred methods for receiving information from the City (see p.36). There is a strong preference for using the telephone to contact the city with an inquiry or concern (68%), but less of a consensus when it comes to conducting business with the City (30% online, 21% in-person and 18% telephone). (see p.37)

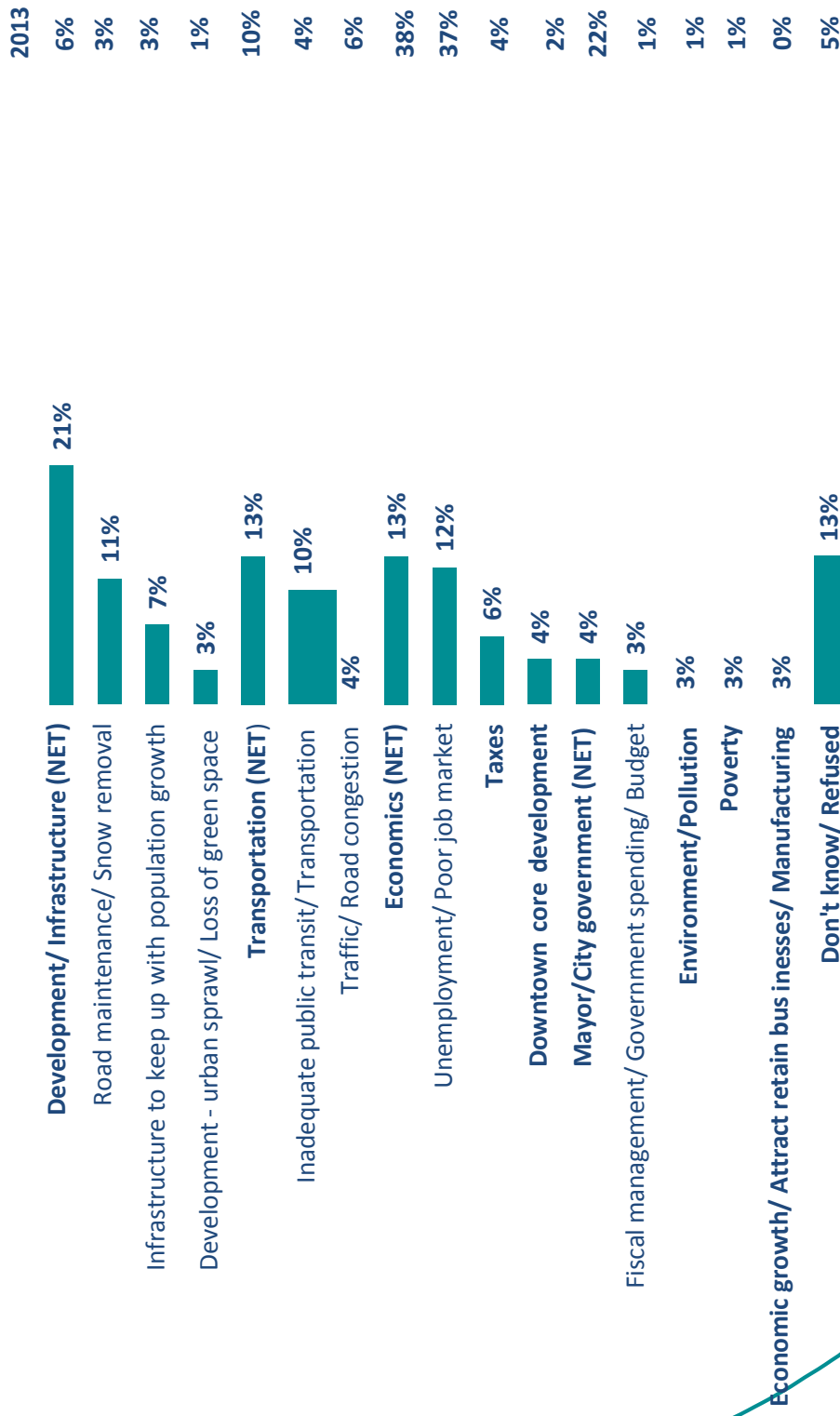
Follow-up by City regarding concerns and complaints seen as *very important*. Nine-in-ten believe it is important for the City to follow up with residents regarding concerns or complaints, including 76% who see this as *very important*. (see p.39)

Detailed Findings

Most Important Issues: Top Mentions

Most Important Issues in London – Top Mentions

Since 2013, City of London residents are more likely to focus on development and infrastructure issues, with two-in-ten now saying these are the most important issues facing the City (up 15 points from 2013), including a growing number (one-in-ten) who specifically mention road maintenance/snow removal (up 8 points) and economic issues (down 25 points). Those who specifically mention unemployment/poor job market (down 25 points). Another one-in-ten cite transportation issues, particularly inadequate public transit/transportation, which is up since 2013 (up 6 points). One-in-ten are unable to mention any important issue facing the City.



Q1. To begin in your view, what are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council?
 Base: All respondents 2013 (n=501); 2015 (n=500).

*Other mentions less than 3% not shown on graph.

Quality of Life



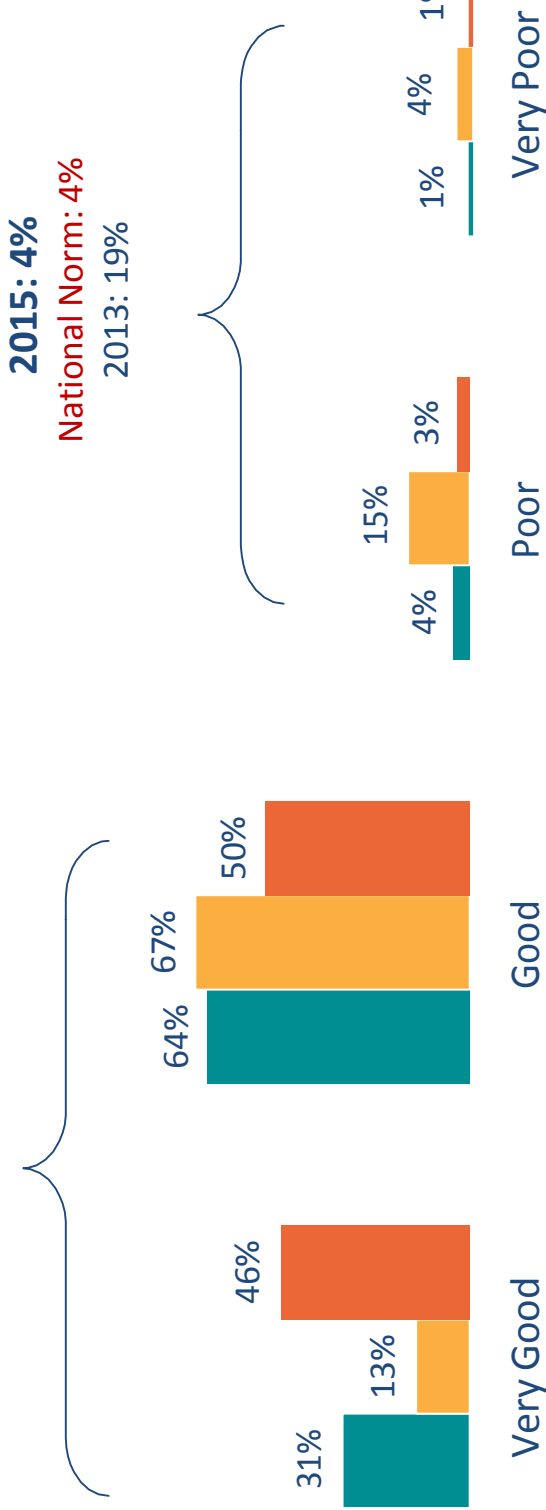
Overall Quality of Life

An overwhelming majority of London residents believe that the quality of life in London is good (95%). Among these, two-thirds believe the quality of life is *good* versus one-third who believe it is *very good*. While the overall quality of life scores have increased compared to 2013, it is important to note that the scale and methodology changed in 2015.

The overall quality of life in the City of London is on par with the National Norm (96%), however, the City scores significantly lower than the National Norm in the proportion who rate it as *very good* (31% vs. 46%, respectively).

2015: 95% 2013: 50% Norm: 96%

National Norm: 96%
2013: 81%



Please note that in 2013 the scale used consisted of excellent, good, fair and poor. In order to compare London's overall quality of life to the National Norm, this scale was changed to very good, good, poor and very poor.

Q2. How would you rate the overall quality of life in the City of London today? Would you say it is....
Base: All respondents 2013 (n=501); 2015 (n=500).



Overall Quality of Life by Sub-Groups

London residents who have been living in the City for over 20 years are significantly more likely than other residents to perceive the quality of life as *very good*. In the same vein, perceptions of a very good quality of life are positively correlated with age – in other words, the older the resident, the more likely they are to perceive the quality of life to be very good.

Those living in smaller households (1 to 2 residents) are more likely to perceive London to have a very good quality of life compared to those from households with 3 or more residents.

Overall Quality of Life

		Years in London				Age				Living in Household		
Total		< 20 years	> 20 years	18-34	35-54	55+	1	2	3+			
Total												
A	B	C	D	E	F	G	H	I				
Sample size =	500	133	352	154	176	169	92	170	224			
Good (Top 2 Score)	95%	91%	97%	94%	93%	96%	92%	99%GI	93%			
Very Good	31%	22%	34%B	19%	30%D	42%DE	41%I	39%I	20%			
Good	64%	69%	63%	75%EF	64%F	54%	52%	60%	73%GH			
Poor	4%	8%	2%	4%	5%	3%	6%	1%	5%H			
Very Poor	1%	0%	1%	0%	1%	1%	1%	0%	1%			

ABCD

Letters in the lower right hand corner indicate a significantly higher score than the segment associated with the letter.

Q2. How would you rate the overall quality of life in the City of London today? Would you say it is....

Base: All respondents 2013 (n=501); 2015 (n=500).



Top Mentions for Overall Quality of Life

As seen earlier, an overwhelming majority of residents (95% or n=473) perceive the quality of life in the city as good. The main reasons provided are because it is a good/friendly city, there is lots to do, and because it is a safe city. Few residents (n=22) think the quality of life is poor, with the most common reasons being unemployment and lack of jobs, followed by improper spending of money and bad roads/infrastructure.

Why Quality of Life is Good



Q3a. Why do you think the quality of Life is [good/ very good]?

Q3b. Why do you think the quality of life is [poor/ very poor]?

Base: Overall quality of life good/ very good (n=473); Overall quality of life poor/ very poor (n=22)

*Please note that only top mentions of 5% or more are shown on each graph.

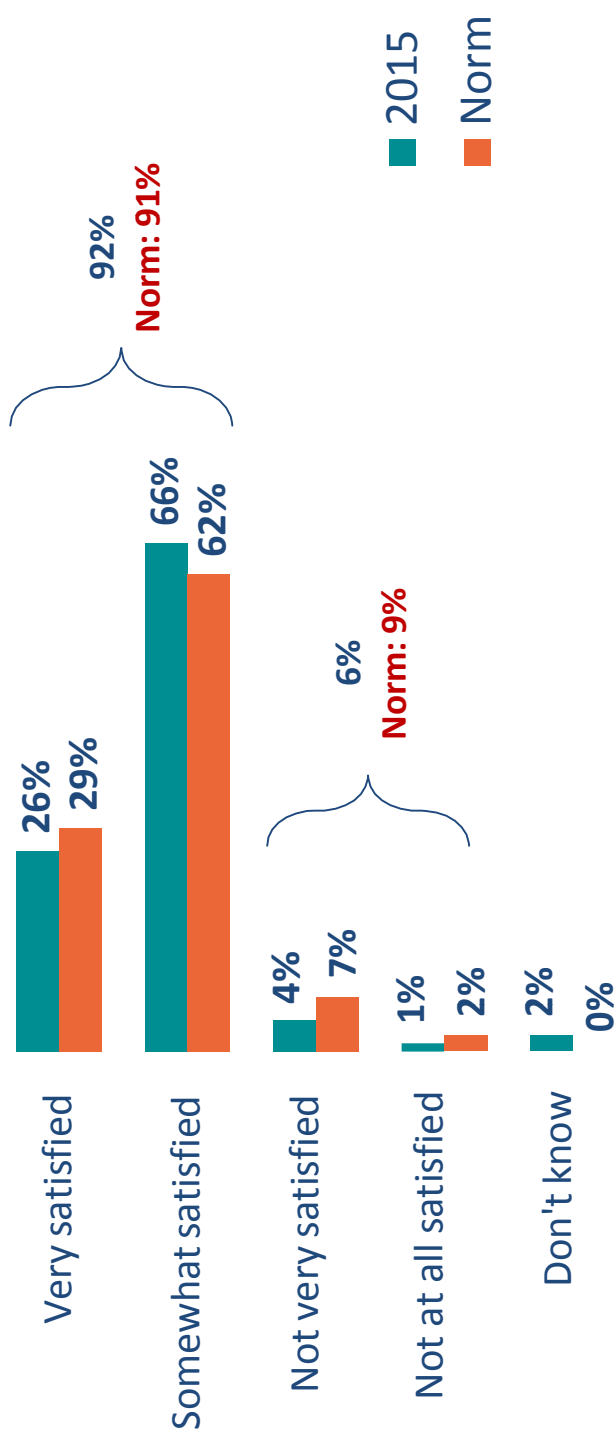
City Services Assessment



Satisfaction with the Overall Level of City Services

An overwhelming majority of London residents are satisfied with the level of service delivery from the City, with most being *somewhat satisfied* (66%) and one-quarter being *very satisfied*. Although few residents are dissatisfied with services, there is room for the City to improve satisfaction since most of these residents are only *somewhat satisfied*.

Overall satisfaction, including the proportion who are *very satisfied*, with London City services is on par with the Canadian National Norm.



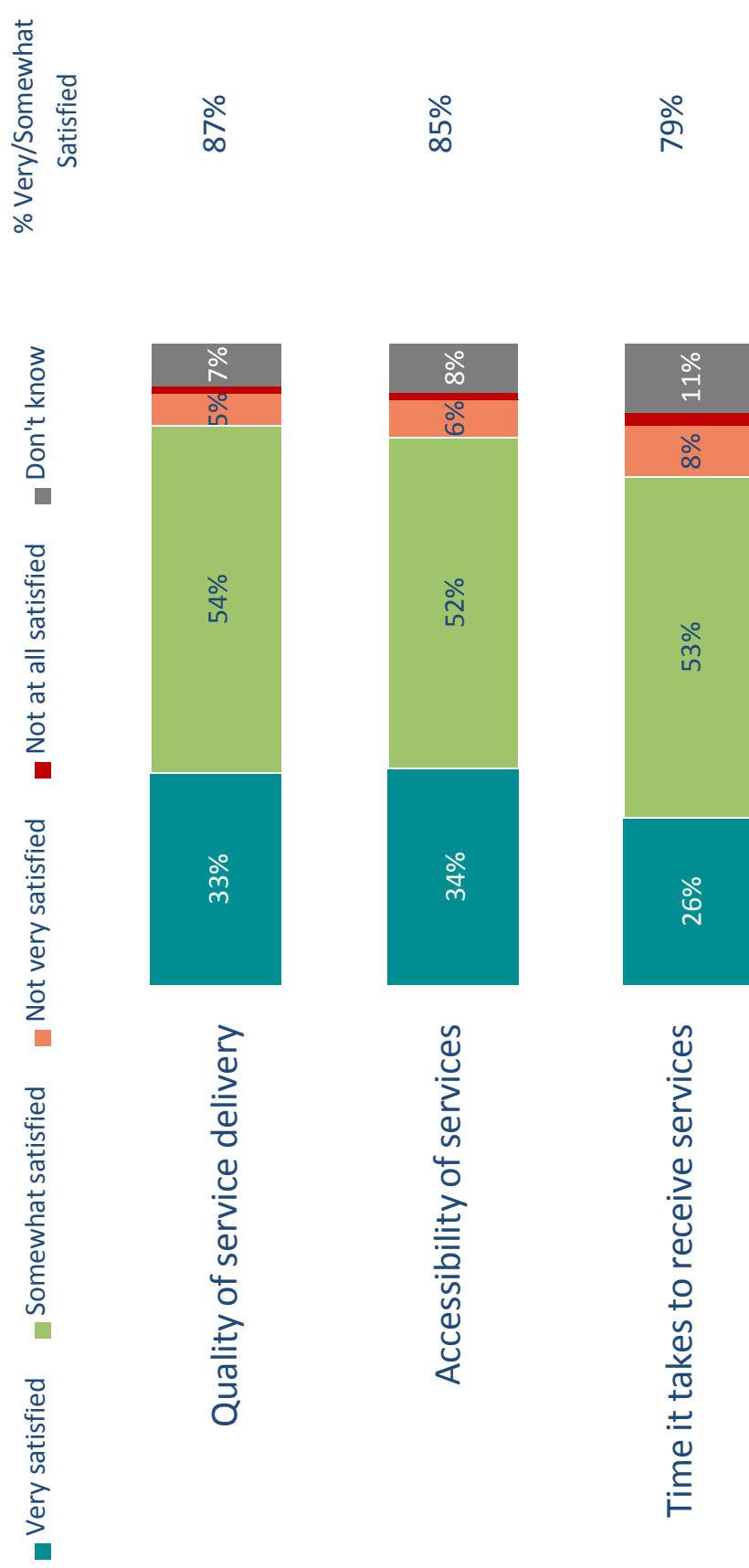
Q4. Please tell me how satisfied you are with the overall level of City services provided by the City of London on a scale of very satisfied, somewhat satisfied, not very satisfied and not at all satisfied? And how about...?

Base: All respondents: (n=500).



Satisfaction with Aspects of City Services

Large majorities of residents are satisfied with quality, accessibility, and the time it takes to receive services from the City of London. However, most are only somewhat satisfied with aspects of City services. Residents are least satisfied with the timeliness of service delivery, but even on this aspect a majority express satisfaction.



*Please note that ratings less than 3% are not labelled on the graph.

Q4. Please tell me how satisfied you are with the [Insert statement] provided by the City of London on a scale of very satisfied, somewhat satisfied, not very satisfied and not at all satisfied? And how about...?

Base: All respondents: (n=500).



Satisfaction with Aspects of City Services by Sub-Groups

While there are no significant differences in satisfaction with the overall level of City services by age and gender, there are significant differences in satisfaction with the accessibility of services by age. Younger residents are significantly more likely than older residents to be satisfied with accessibility of services. This may be driven, in part, by the fact that older residents would be dealing with more issues related to accessibility.

% Very Satisfied

	TOTAL		GENDER		AGE	
	Male	Female	18-34	35-54	55+	
	A	B	C	D	E	
Overall level of City services	26%	27%	22%	25%	32%	
Quality of service delivery	33%	37%	33%	34%	33%	
Accessibility of services	34%	33%	41% ^E	31%	30%	
Time it takes to receive services	26%	29%	28%	23%	27%	

ABCD

Letters in the lower right hand corner indicate a significantly higher score than the segment associated with the letter.

Q4. Please tell me how satisfied you are with the [Insert statement] provided by the City of London on a scale of very satisfied, somewhat satisfied, not very satisfied and not at all satisfied? And how about...?

Base: All respondents: (n=500).



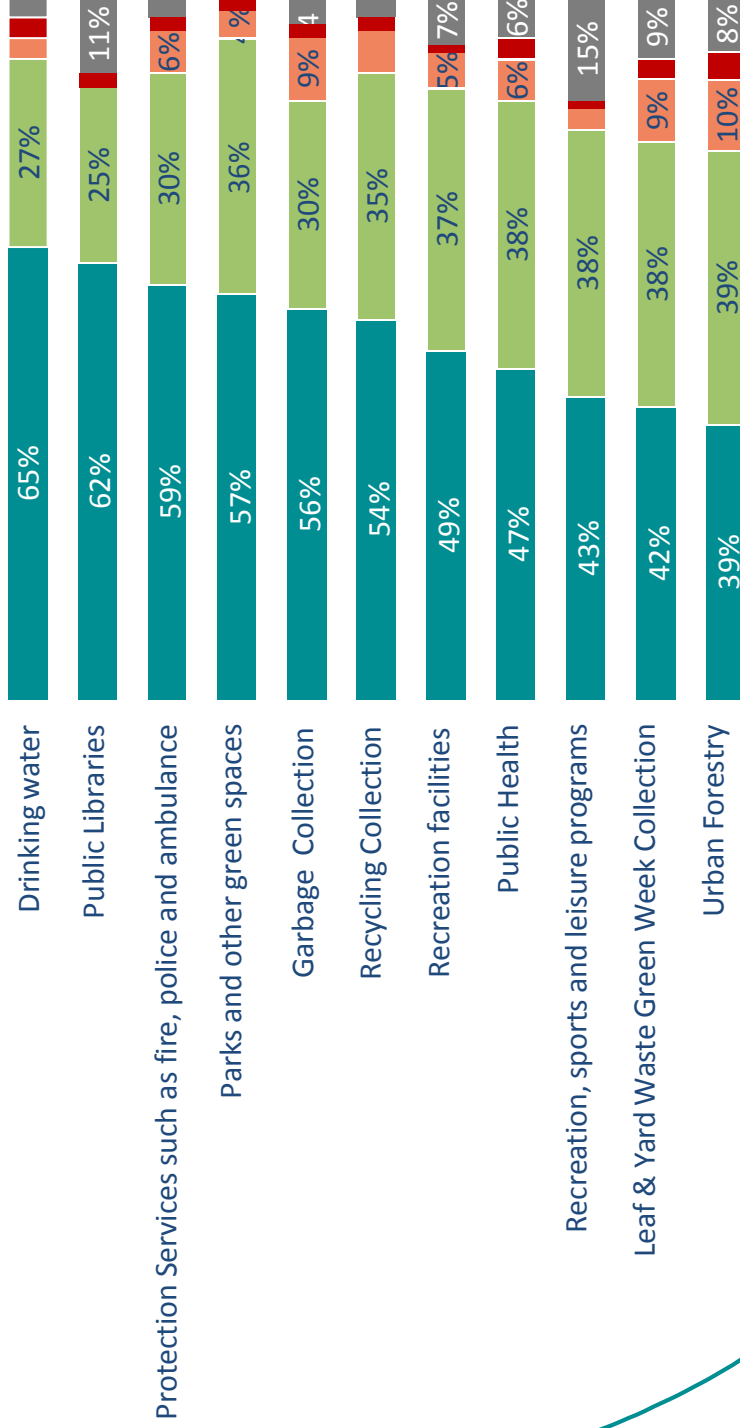
Satisfaction with Individual Services (List of services continues on next slide)

Overall satisfaction scores are relatively high for City services with the majority of residents indicating they are at least *very or somewhat* satisfied with 26 of 31 services tested in the survey. The City services with the highest satisfaction scores where more than half of residents are *very satisfied* are: drinking water, public libraries, protection services, green spaces, and garbage and recycling collections. Between four and five in ten are satisfied with recreation facilities, public health, recreation, sports and leisure programs, leaf and yard waste collection and urban forestry.

■ Very satisfied
 ■ Somewhat satisfied
 ■ Not very satisfied
 ■ Not at all satisfied
 ■ Don't know

% Very/Somewhat Satisfied

2015



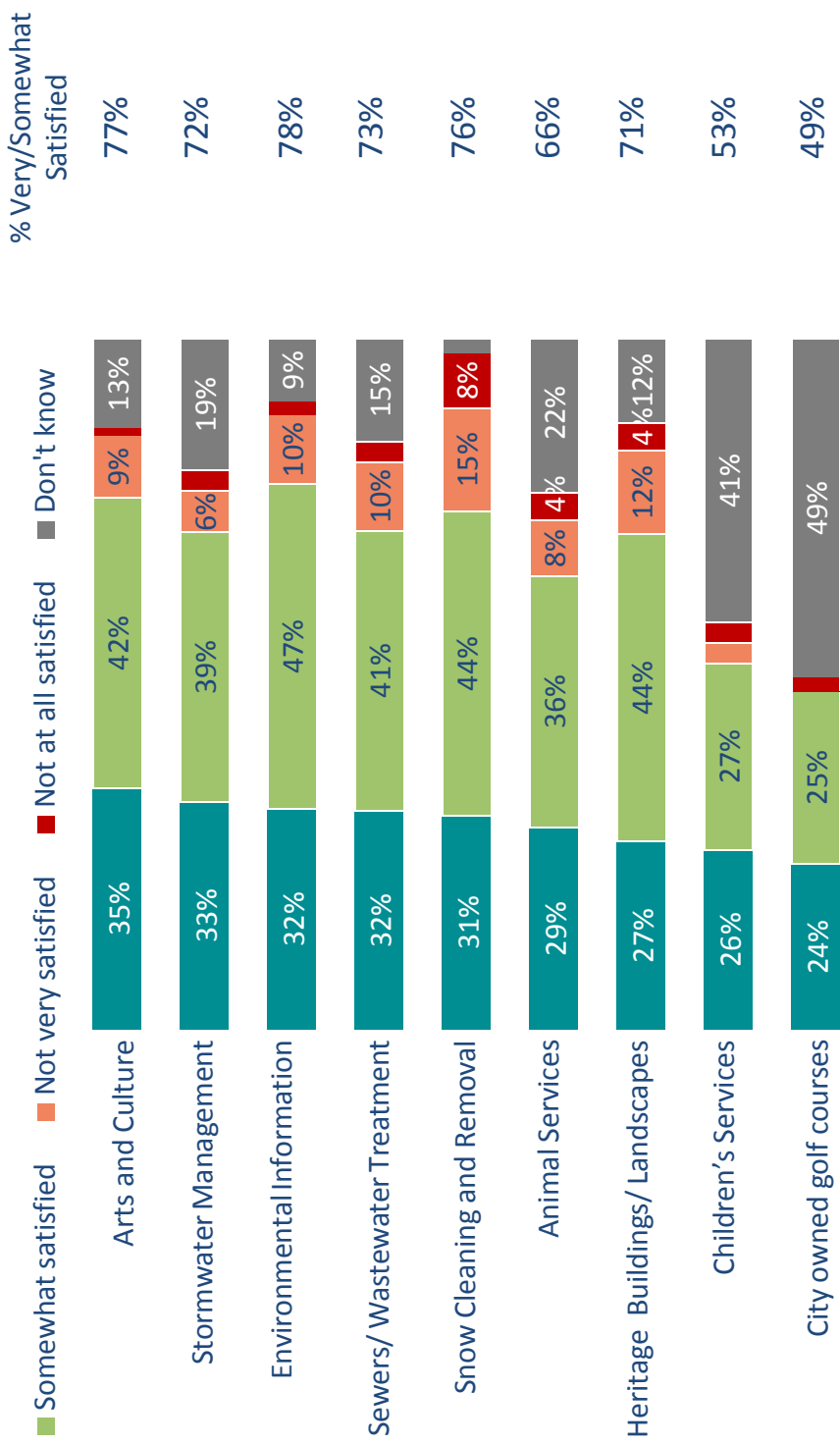
Q5. Now, please rate how satisfied you are with the services provided by the City of London, using a scale of very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.
 Base: All Respondents : (n=500).

**Please note that ratings less than 4% are not labelled on the graph*



Satisfaction with Individual Services (List of services continues on next slide)

About three in ten residents are *very satisfied* with arts and culture, stormwater management, environmental information, sewers, snow removal and animal services. One-quarter of residents are *very satisfied* with heritage buildings/landscapes, children’s services and City owned golf courses , but between four and five in ten residents didn’t know how to rate the satisfaction of children’s services and golf courses – this may be in part because fewer residents have used these services.



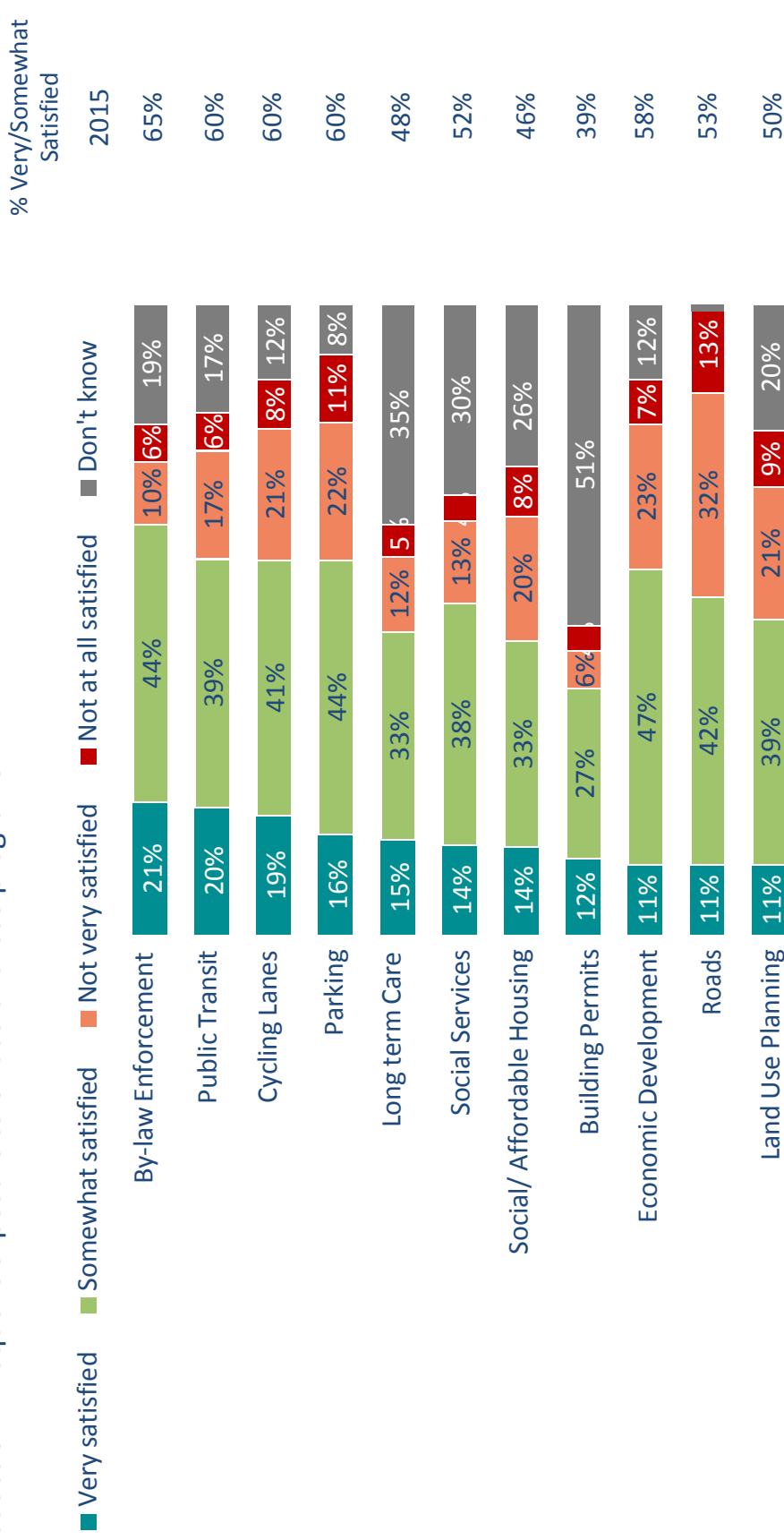
**Please note that ratings less than 4% are not labelled on the graph*

Q5. Now, please rate how satisfied you are with the services provided by the City of London, using a scale of very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.

Base: All Respondents : (n=500).

Satisfaction with Individual Services (End of list)

Two-in-ten residents are *very satisfied* with by-law enforcement, transportation services like: public transit, cycling lanes and parking. Meanwhile only one-in-ten are *very satisfied* with road conditions. Similar proportions are satisfied with long term care, social services, social housing, building permits, economic development, and land use planning. Sizeable proportions of between one-quarter and half were unable to offer a satisfaction score for long-term care services, social services, social housing and building permits. In some instances this may be a product of infrequent exposure to or use of these programs



Q5. Now, please rate how satisfied you are with the services provided by the City of London, using a scale of very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.
 Base: All Respondents : (n=500).

*Please note that ratings less than 4% are not labelled on the graph

Gap Analysis

Using the Gap Analysis

- The Gap analysis that follows (p. 25) shows the difference between how important various City services are to residents and how satisfied they are with the services. Importance scores are plotted horizontally across the bottom of the chart (along the X-axis). Satisfaction scores are plotted vertically (along the Y-axis). Importance scores are derived from correlation analysis with overall City service satisfaction and satisfaction scores represent overall stated satisfaction (*very & somewhat*) with each of the individual City services.
- Typically, it is most advantageous to focus on improving services that are of high importance to residents but where satisfaction is relatively low. However, in some instances it can also make strategic sense to focus on lower importance items if the City can see that a big difference can be made.

On the graph, four areas are identified:

- **Primary Areas for Improvement** – services that are considered very important, but with lower satisfaction scores. The focus here is on improving these services to increase satisfaction. This is slated as the primary area for improvement because the correlation analysis identifies that these services are the strongest drivers of satisfaction. If the City can increase satisfaction this will have the largest impact on overall perceptions of City services.
- **Secondary Areas for Improvement** – services that are of relative less importance, with the lowest satisfaction scores. This should be the secondary area of focus to improve the satisfaction scores.
- **Primary Areas for Maintenance** – services of relatively high importance and high satisfaction. The focus here is on maintaining the current level of service and satisfaction.
- **Secondary Areas for Maintenance** – services with lower importance scores but high satisfaction scores. The focus here should be to maintain satisfaction levels.

Understanding the Gap Analysis

Primary areas for improvement are:

• Land Use Planning	• Economic Development
• Public Transit	• Roads

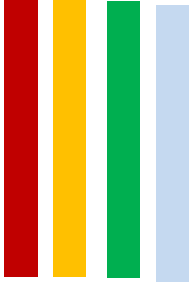
Land use planning, economic development, public transit and roads should be the primary areas for improvement for the City of London. These services have high derived importance scores and are some of the strongest drivers of satisfaction with the City's overall level of service. Improving these services can have a large impact on improving satisfaction.

Secondary areas for improvement are:

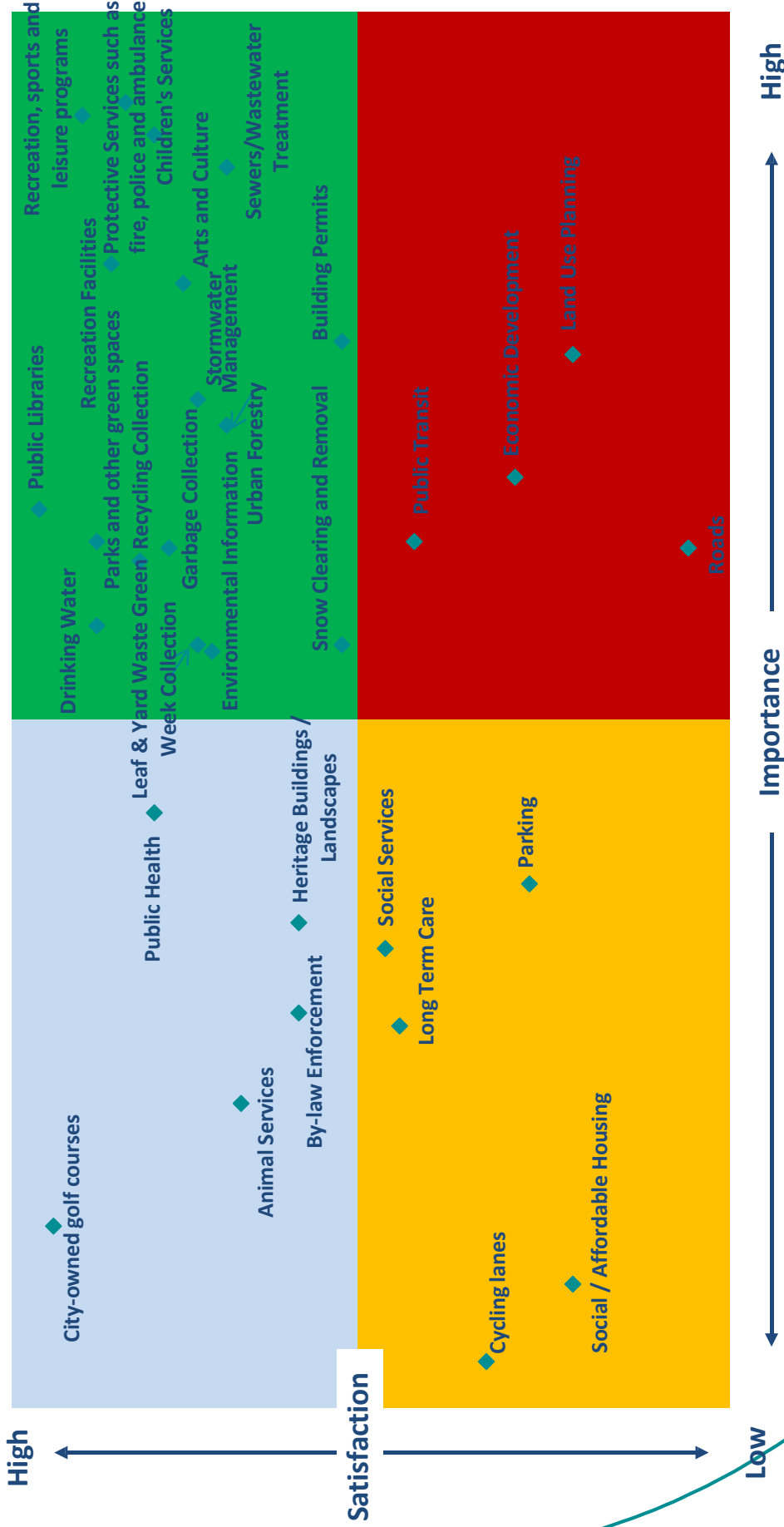
• Parking	• Social Services	• Long Term Care
• Social/Affordable Housing	• Cycling Lanes	

Additional services that fall within the secondary area for improvement that should be areas of focus include: parking, social services, long term care, social/affordable housing and cycling lanes.

Gap Analysis



- Primary Areas for Improvement
- Secondary Areas for Improvement
- Primary Areas for Maintenance
- Secondary Areas for Maintenance



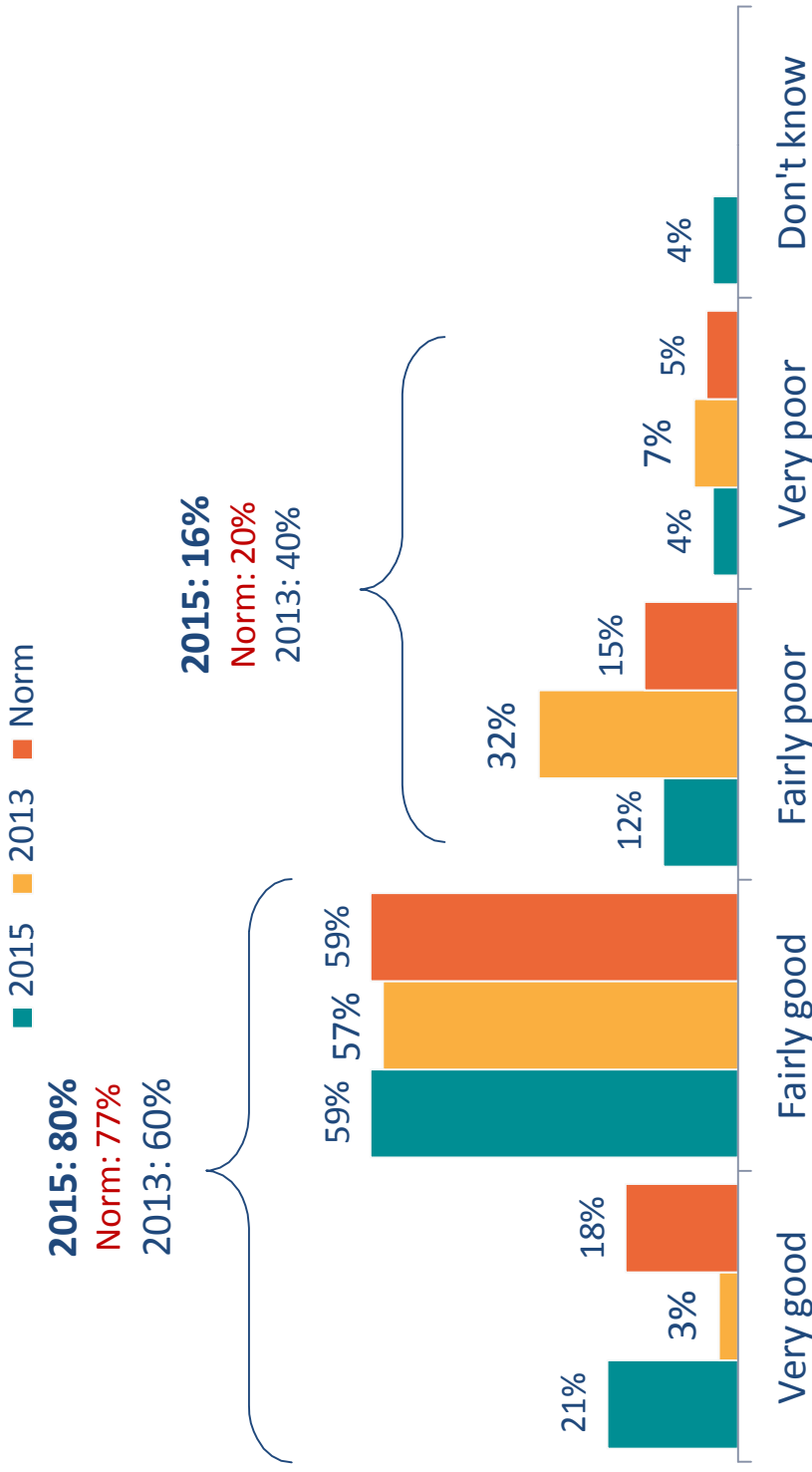
*Please note that for the gap analysis, the 'don't know' responses have been removed

Value for Tax Dollars



Value for Tax Dollars

Eight-in-ten residents believe that the value for tax dollars based on the programs and services they receive from the City of London is at least *good*, including two-in-ten who believe it is *very good*. Since 2013, there has been an increase of 18 percentage points in the proportion who believe the value for tax dollars is *very good*. In contrast, the proportion who think they are receiving a *fairly poor* value for tax dollars is down by 20 percentage points. The perceived value for tax dollars for the City of London is on par (although directionally higher – within the margin of error) with the National Norm.



**Note: "Don't know" was not an option in 2013

Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?)
Base: All respondents: 2013 (n=501); 2015 (n=500).



Value for Tax Dollars by Sub-Groups

Residents who are significantly more likely than their counterparts to say they get *very good* value for their tax dollars include females and those living in smaller households (1-2 residents).

Value for Tax Dollars

		Gender		Age		Living in Household			
Total		Male	Female	18-34	35-54	55+	1	2	3+
	A	B	C	D	E	F	G	H	I
Sample size =	500	237	263	154	176	169	92	170	224
Good (Top 2 Score)	80%	78%	82%	83%	77%	80%	83%	78%	80%
Very Good	21%	17%	25%B	19%	19%	26%	30%I	24%I	16%
Fairly Good	59%	62%	56%	65%	58%	54%	53%	54%	64%H
Fairly Poor	12%	13%	11%	10%	15%	12%	11%	13%	12%
Very Poor	4%	5%	3%	1%	5%D	6%D	2%	4%	5%

Letters in the lower right hand corner indicate a significantly higher score than the segment associated with the letter.

ABCD

Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?)
 Base: All respondents: 2013 (n=501); 2015 (n=500).

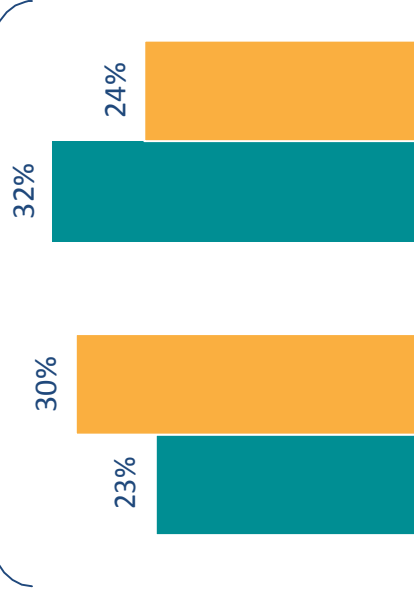


Balance of Taxation and Services

In balancing taxation and service delivery levels, residents would rather the City of London increase taxes (54%) rather than cut services (29%). When it comes to increasing taxes, there is some preference for increasing taxes to maintain services at current levels over increasing them to enhance or expand services (32% vs. 23%). When it comes to cutting services, there is a clear preference for cutting services to maintain the current tax level over cutting them to reduce taxes (21% vs. 8%). About two-in-ten do not choose any of these options or offer no opinion. Because of a change in response options, caution should be used in making direct comparisons to 2013 figures.

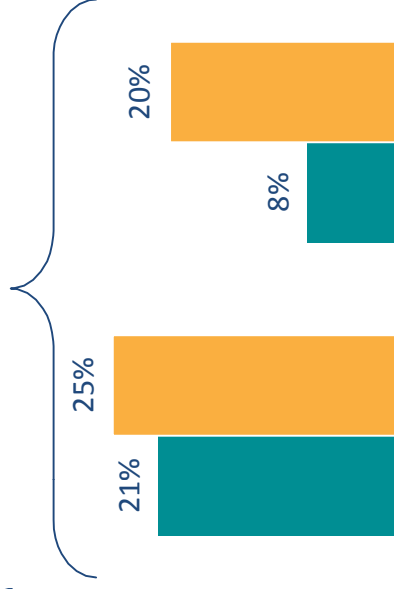
% Increase taxes:

2015: 54%
2013: 53%



% Cut services:

2015: 29%
2013: 45%



Increase taxes to enhance or expand City services | Increase taxes to maintain services at current levels | Cut services to reduce taxes | Cut services to maintain current tax level | None of the above | Don't know

**Note: "None of the above" was not an option in 2013

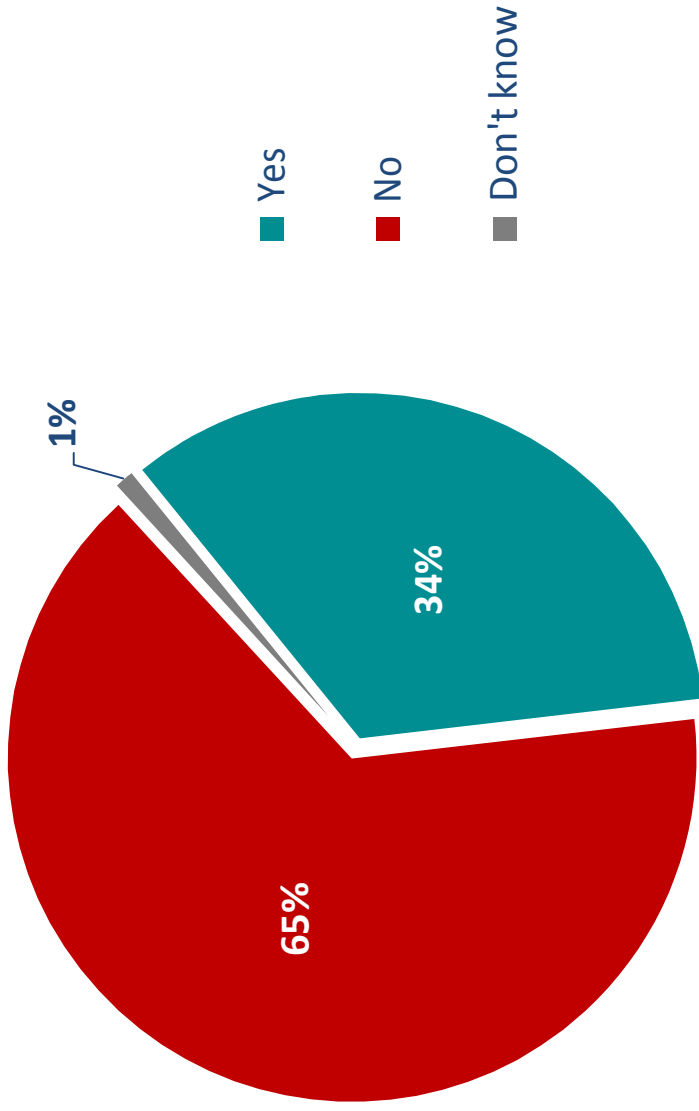
Q7. Municipal property taxes are the primary way to pay for services provided by the City of London. To help the City of London balance taxation and service delivery levels, which of the following four options would you most like the City to pursue?
Base: All respondents 2013 (n=501); 2015 (n=500).

Experience & Satisfaction with City Staff



Contact with City in Last 12 Months

One-third of residents indicated that they had personally contacted the City or dealt with one of the City of London's employees in the last 12 months.

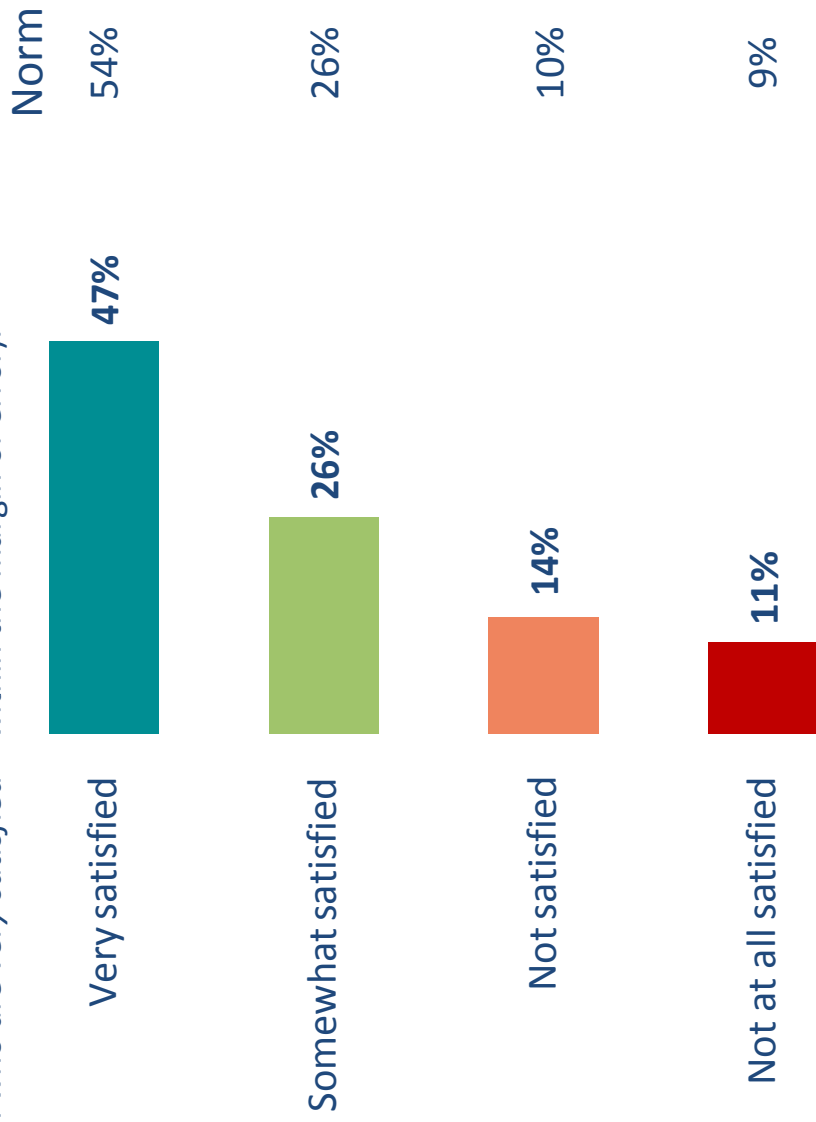


Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Base: All respondents: (n=500).

Satisfaction Levels Among those who Had Contact with the City

Three-quarters of residents who had contact with the City were satisfied with the overall service that they received – half of which were *very satisfied*. Among those who contacted the City, women are significantly more likely than men to be *very satisfied* with their service experience.

Overall satisfaction levels with services received are on par with the National Norm (although directionally lower on the proportion who are *very satisfied* – within the margin of error).



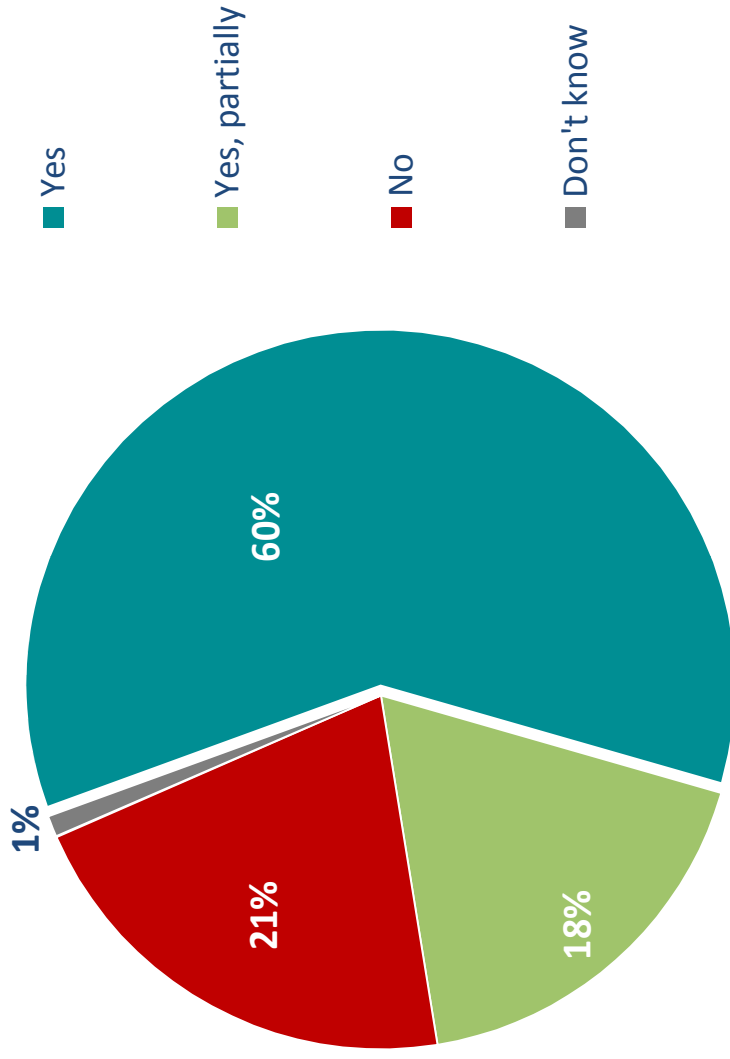
Q9. And thinking of the last time you contacted the City of London, how satisfied were you with the overall service you received? Would you say you were...

Base: Contacted the City of London (n=172).



Received Needed Service or Support

Among those residents who had contact with the City, six-in-ten say they received all of the service or support they needed. Another two-in-ten say they partially received what they needed, while a similar proportion say they did not receive the service or support that they required.



Q10. In the end, did you receive the service or support you needed?
Base: Contacted City of London (n=172).

Level of Agreement with Service Experience

Among residents who interacted with the City, overwhelming majorities of eight-in-ten or more think the staff were courteous, knowledgeable, and treated them fairly. A smaller number, but still a majority of six-in-ten, agree that City staff went the extra mile to help them get the services and support they needed.



*Please note that ratings less than 4% are not labelled on the graph.

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 [Insert statement]?
 Base: Contacted City of London: (n=172).

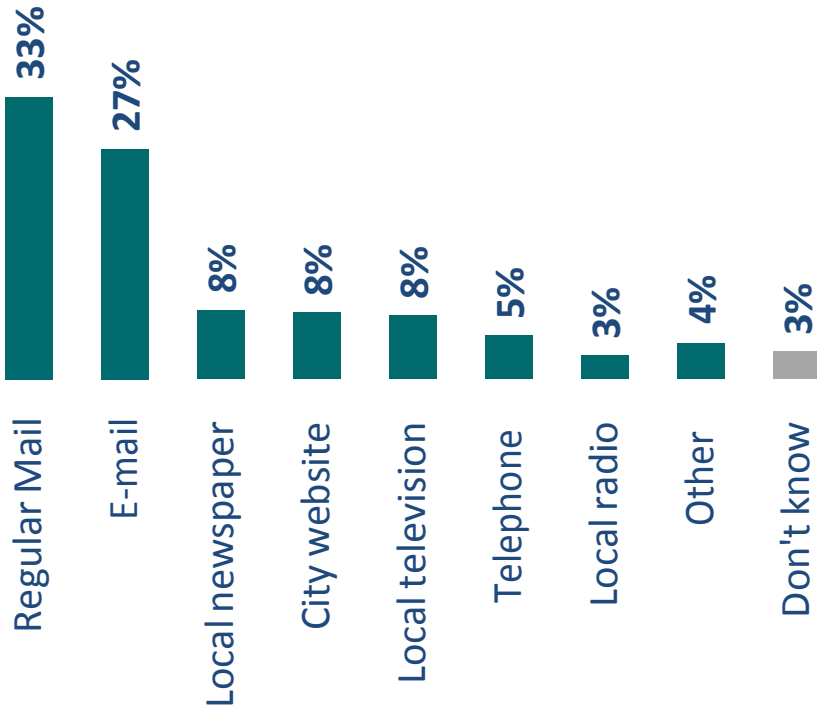
Communications



Preferred Method of Receiving Information From City

Regular mail (33%), followed by e-mail (27%) are the most preferred methods for receiving information from the City of London.

Residents under the age of 55 are significantly more likely than their older counterparts to prefer to receive information via email.



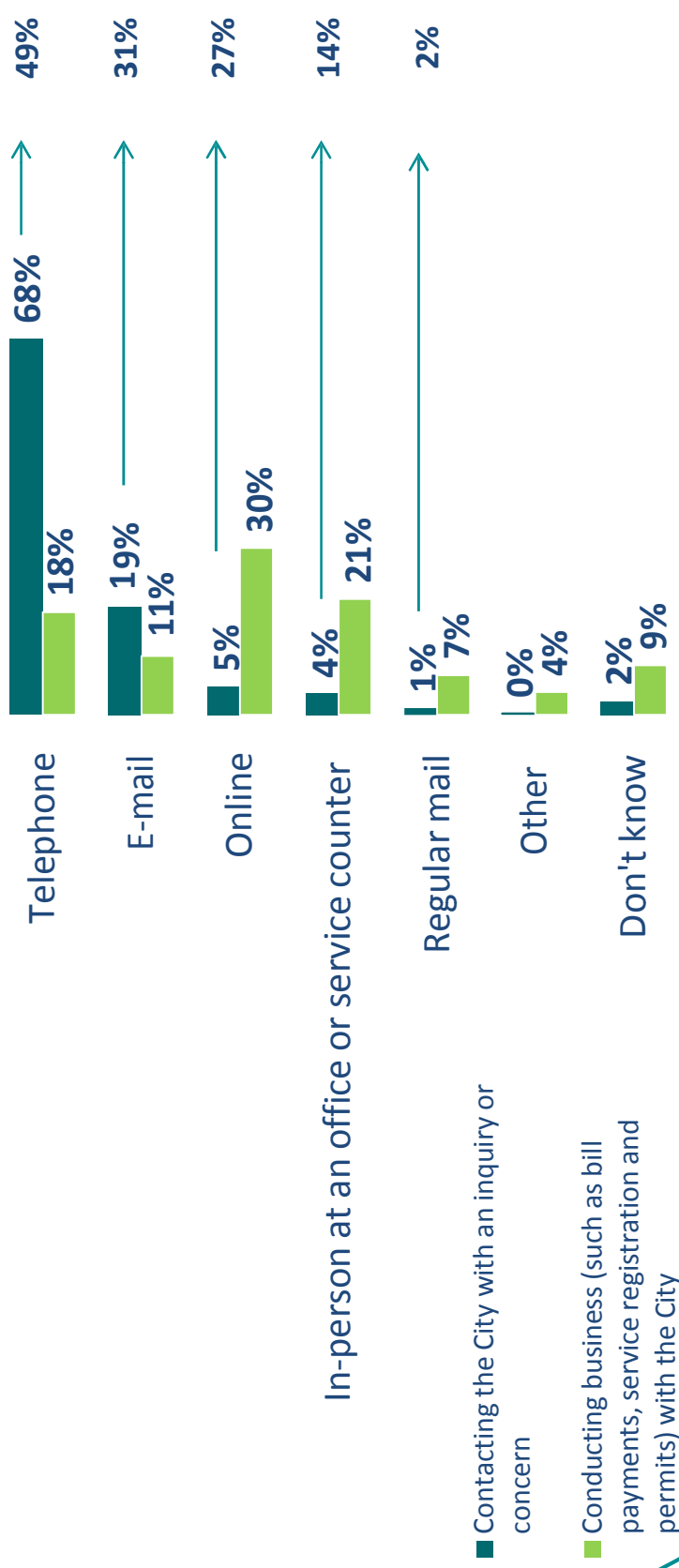
QC1. Thinking about your information needs, what is your preferred method for receiving information from the City of London?
Base: All respondents: (n=500).

Preferred Method of Contacting the City of London

When it comes to contacting the City with an inquiry or concern, there is a strong preference to do this over the telephone, with seven-in-ten residents choosing this method of contact. Two-in-ten would prefer to do this via e-mail. Residents over the age of 55 are more likely to prefer contacting the City with an inquiry or concern via the telephone, while younger residents are more likely to prefer doing this via email.

When it comes to conducting business with the City, residents are more divided but the largest share prefer to conduct business with the City online (30%), followed by in-person (21%) and by telephone (18%).

2013



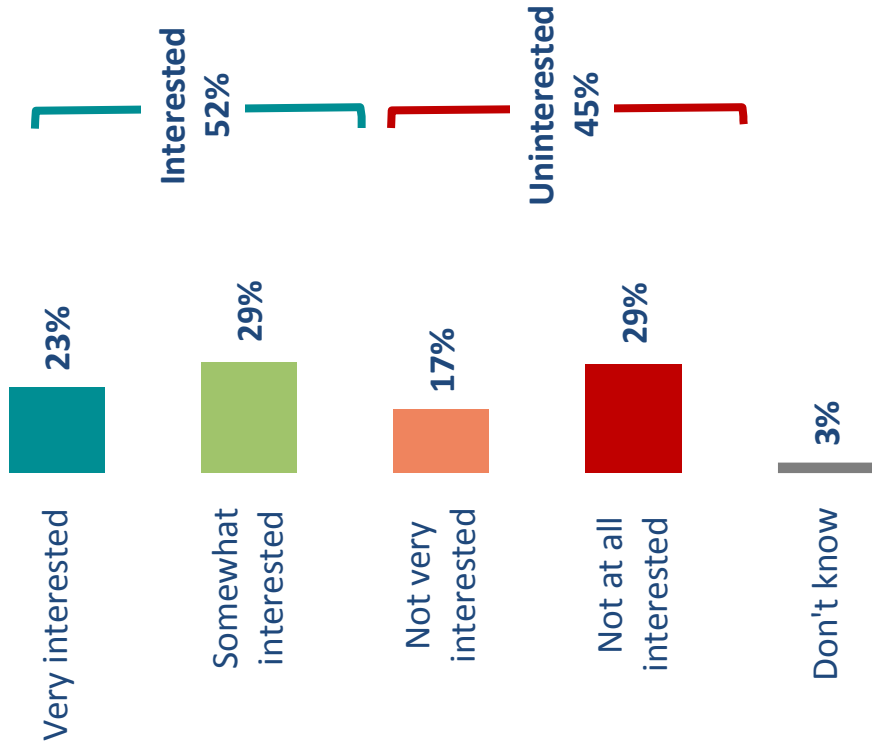
QC2. And, what is your preferred method of [insert]?
Base: All respondents: (n=500).



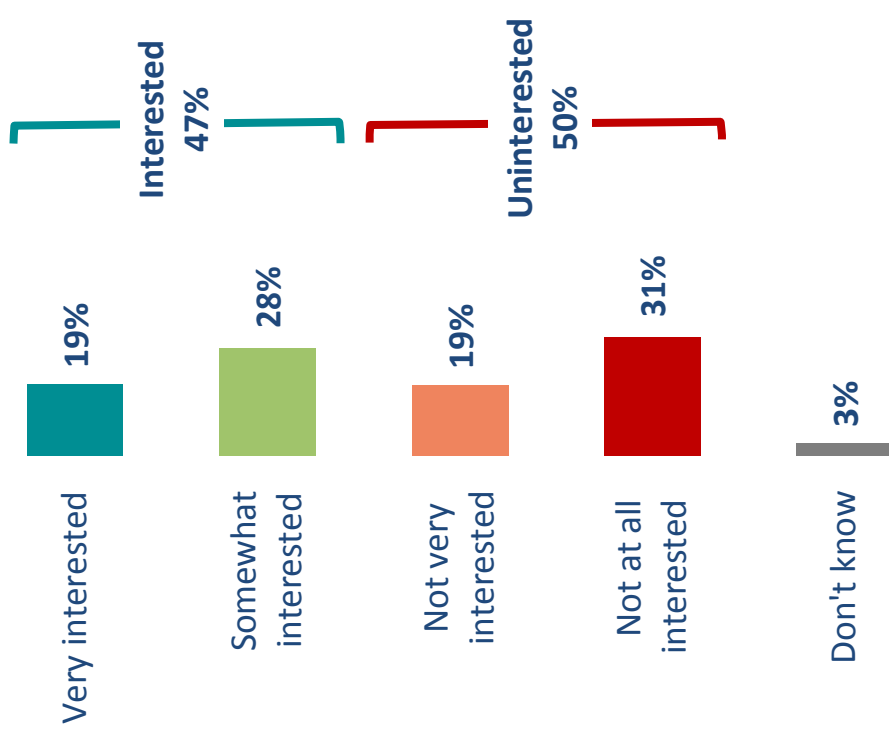
Level of Interest in Receiving Community Information

Approximately half of residents are interested in receiving information from the City about their community, including services, programs and events, via e-mail or social media. Women are more likely than men to be interested in receiving this information via social media.

E-mail



Social Media



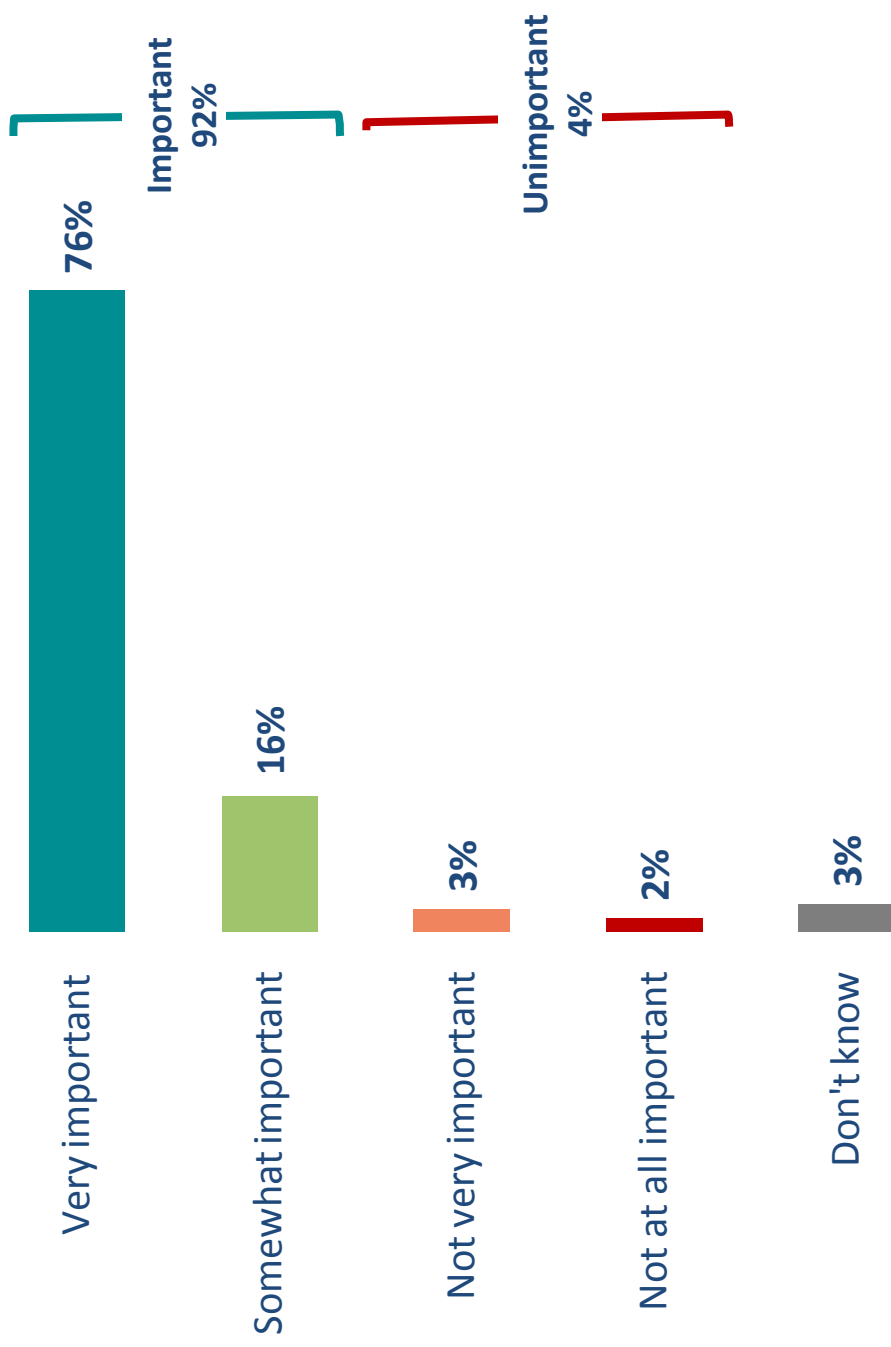
QC3. How interested are you in receiving information about your community including services, programs and events via [insert]? Are you...?

Base: All respondents: (n=500).



Importance of the City Following-up Regarding Concerns & Complaints

The overwhelming majority of residents believe that the City of London should follow-up with residents regarding concerns or complaints they made to the City, including three-quarters who believe it is *very important*.



QC4. How important is it that the City follow-up regarding the concerns or complaint you made to the City? Would you say...?
Base: All respondents (n=500).

Demographic Profile

Demographic Profile of Survey Respondents

Age	
18 – 34	31%
35 – 54	35%
55 and over	34%

Number of People Living in Home	
One	18%
Two	34%
Three	19%
Four	17%
Five or more	9%

Number of Children Under the Age of 18 in Home	
0	68%
1-2	27%
3 or more	4%
Don't know/ Refused	0%

Annual Household Income Before Taxes	
Less than \$25,000	9%
\$25,000 to less than \$50,000	16%
\$50,000 to less than \$75,000	18%
\$75,000 to less than \$100,000	18%
\$100,000 to less than \$150,000	12%
\$150,000 or more	7%

Highest Education Level Completed	
Less than high school	6%
High school graduate or equivalent	20%
Some/completed trade/technical school	2%
Some/completed community college	23%
Some/completed university	32%
Graduate/professional studies	13%
Gender	
Male	47%
Female	53%

Number of Years Living in London	
Less than 1 year	2%
1 to less than 5 years	5%
5 to less than 10 years	4%
10 to less than 20 years	15%
20 years or more	70%

Own or Operate a Business	
Yes	8%
No	89%
Don't know	3%

Rent or Own Home	
Own	75%
Rent	21%



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