

#### **Ipsos Public Affairs**



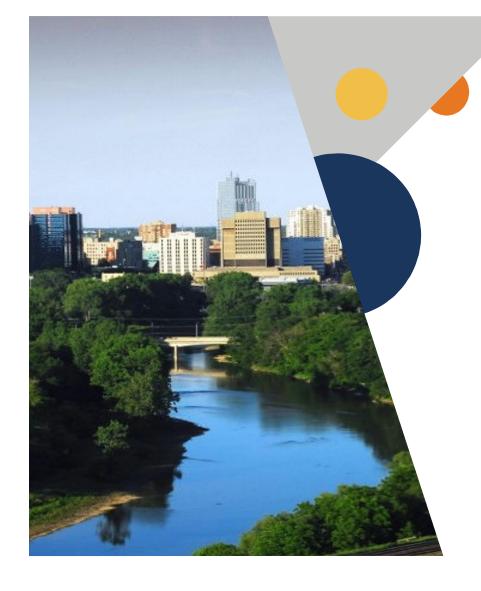
Citizen Satisfaction Study Report

### **City of London**

JULY 7, 2016

© 2016 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.





#### **CONTENTS**

03 Objectives

4 Methodology

5 Key Findings

10 Detailed Findings

11 Most Important Issues

13 Quality of Life

17 City Services Assessment

23 Gap Analysis

27 Value for Tax dollars

Experience and Satisfaction with city
Staff

36 Communication

41 Demographic Profile

#### **OBJECTIVES**

- Ipsos Reid is pleased to present the City of London with the results of the 2016 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 May 11 and 21, 2016.
- 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 2013 data comes from an online survey conducted by another vendor. Caution should be used in comparing the 2013 online data to the 2015 and 2016 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 TAKE AWAYS**

Overall, there has been little significant change in the perceptions of City of London residents in most areas. The City continues to be perceived as providing a good quality of life and receives good ratings on satisfaction with overall level of City services and on most individual service areas.

Key take aways include:

Transportation, mainly focused on inadequate public transit/ transportation, is now the leading issue on the public agenda, and this perception is reinforced by the decline in satisfaction with public transit. Public transit continues to be one of the leading drivers of satisfaction with the overall level of City services.

We also see that development/ infrastructure issues continue to be high on the public agenda. Although majorities are satisfied with planning issues (land use planning, planning to manage the growth of the City, planning to control the quality of development and planning for improvements to core areas of the City) and roads, only about one-in-ten are very satisfied with any of these areas. Moreover, four out of five of these areas are among the leading drivers of satisfaction with overall satisfaction with City services, and the remaining area (planning to control quality of development) is a secondary driver of overall satisfaction with City services.

#### **KEY FINDINGS (1)**

#### Transportation, infrastructure and economic issues are top mentions for residents.

Significant increase in the number of residents who cite transportation as the issue that should receive the greatest attention from the City (23%, up from 13% in 2015), with particular attention to inadequate public transit/ transportation (17%, up from 10%). Development and infrastructure (19%) and economic issues (13%) are also seen as a top priority. (see p.12)

#### Overall quality of life scores remain on par with National Norm, with strongly positive views also remaining lower.

Overwhelming majority (93%) of residents continue to believe the quality of life in the City of London is good (on par with the National Norm), including one-third (33%) who say "very good." (see p.14)

#### Satisfaction with the level of City services remains on par with National Norm.

Vast majority (90%) remain satisfied with the overall level of City services, including 30% who are very satisfied. Both figures are on par with National Norm. However, most residents report that they are somewhat satisfied (61%). (see p.18)

#### Satisfaction with public transit is down.

Satisfaction with nearly all individual services is similar to 2015, but there has been a significant decline in satisfaction with public transit. (see p.22) This drop in satisfaction is in keeping with the growing perception that the City should be focusing its attention on the issue of inadequate public transit/ transportation. (see p.12)

#### **KEY FINDINGS (2)**

Roads, land use planning, economic development, public transit, planning to manage growth, parking, cycling lanes and planning for improvements to Core Areas strongest drivers of overall satisfaction.

Gap analysis (see pp. 24-26) indicates that the City should focus on roads, land use planning, economic development, public transit, planning to manage growth, parking, cycling lanes and planning for improvements to Core Areas, as boosting scores in these areas would have greatest impact on satisfaction with overall level of service.

#### Large majority continue to perceive that they are getting good value for tax dollars, and remains on par with National Norm.

Large majority (79%) believe they are getting good value for their tax dollars based on programs and services they receive from the City, including two-in-ten (22%) who say they receive very good value Moreover, this latter figure remains on par with the National Norm (19%). (see p.28)

#### On balance, residents continue to prefer increased taxes over cutting services, but sizeable number are unsure.

When presented with options, most residents prefer increasing taxes (53%) to cutting services (32%). There is some preference for increasing taxes to maintain rather than enhance or expand services (31% vs. 22%), but a clear preference for cutting services to maintain rather than reduce tax levels (23% vs. 9%). More than one-in-ten residents have difficulty in choosing between these options and chose none of the above or don't know. (see p.30)

#### **KEY FINDINGS (3)**

#### Large 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.32). Among these, a large majority are satisfied (79%), including 46% who are very satisfied (see p.33). These figures are on par with the National Norm. Moreover, there has been a significant increase in the proportion who had contact who report receiving the service or support they needed (72%, up from 60%), but it should be noted that 17% say they did not and another 11% (down from 18%) say they only received partial service (see p.34)

#### Mail and e-mail remain the most preferred methods of receiving information from the City, but telephone is the clear choice for contacting the City.

Regular mail (37%), followed by e-mail (30%) are the most preferred methods for receiving information from the City (see p.37). There is a strong preference for using the telephone to contact the city with an inquiry or concern (67%), but less of a consensus when it comes to conducting business with the City (34% online, 19% telephone and 18% in-person). (see p.38)

#### Follow-up by City regarding concerns and complaints continues to be seen as very important.

Nine-in-ten believe it is important for the City to follow up with residents regarding concerns or complaints, including 75% who see this as very important. (see p.40)

## DETAILED FINDINGS

## MOST IMPORTANT ISSUES: TOP MENTIONS

#### **MOST IMPORTANT ISSUES IN LONDON – TOP MENTIONS**

Since 2015, City of London residents are more likely to focus on transportation, with more than two-in-ten now saying it is the most important issue facing the City (up 10 points from 2015), including a growing number (almost two-in-ten) who specifically mention inadequate public transit/ transportation. Two-in-ten mention development/infrastructure, specifically roads or road repair and infrastructure.

	2016	2015	2013	2016	2015	2013
NET: Transportation	23%	13%	10%	NET: Mayor/city gov't 4%	4%	22%
Inadequate public transit/transportation/GO Transit	17%	10%	4%	Fiscal management/govt. spending/budget 2%	001	
Traffic/road congestion/traffic lights	5%	4%	6%	riscal management/govt. spending/budget 2/0	3%	1%
NET: Development/infrastructure	19%	21%	6%	The dam/dam issue 3%	-	-
Roads/Road repair/snow removal/poorly maintained roads	9%	11%	3%	ENVIRONMENT/POLLUTION 2%	3%	1%
Infrastructure	8%	7%	3%	Downtown core development 2%	4%	2%
Development - urban sprawl/loss of greenspace	2%	3%	1%	and the second s		
NET: Economics	13%	13%	38%	Economic growth/Attract, retain businesses/Manufacturing 2%	3%	-
Unemployment/ poor job market	12%	12%	37%	Housing - lack of affordable housing 2%	2%	n/a
Taxes	5%	6%	4%	Hospitals/health care 2%	1%	n/a
NET: Poverty	5%	3%	1%	n. n		
Poverty	3%	1%	1%	Nothing 4%	2%	2%
Homelessness	3%	2%	-	Don't know / Refused 10%	13%	5%

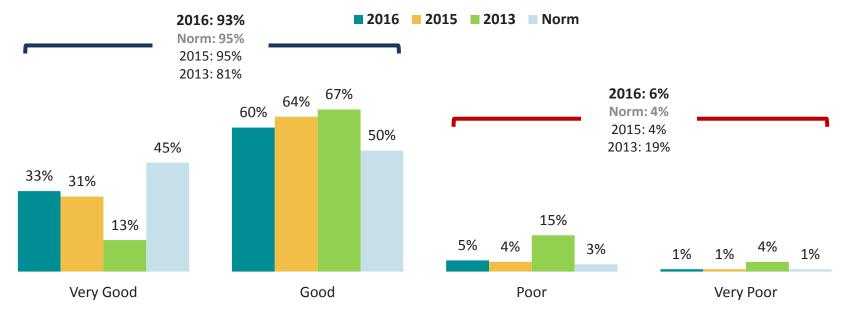
Q1. To begin, in your view, what are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? Base: All respondents 2013 (n=501); 2015 (n=500); 2016 (500) © 2016 lpsos

## QUALITY OF LIFE

#### **OVERALL QUALITY OF LIFE**

An overwhelming majority of London residents believe that the quality of life in London is good (93%). Among these, six in ten believe the quality of life is good versus one-third who believe it is very good. There was a significant change between 2013 and 2015 in overall quality of life scores, but this may have been impacted on by a change in scale and methodology. However, the figure is holding up this year (using the same methodology).

The overall quality of life in the City of London is on par with the National Norm (95%), however, the City continues to score significantly lower than the National Norm in the proportion who rate it as very good (33% vs. 45%, respectively).



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); 2016 (n=500). © 2016 ipsos

#### **OVERALL QUALITY OF LIFE BY SUB-GROUPS**

Large majorities across all demographic subgroups rate the quality of life in London as good. However, 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 households with two people are more likely than those living in a one-person household or in a household with three or more persons to perceive London as having a very good quality of life.

#### **Overall Quality of Life**

	Total		Age		Livi	ng in Housel	nold
	Total	18-34	35-54	55+	1	2	3+
	Α	В	С	D	Ε	F	G
Sample size =	500	136	179	185	89	214	189
Good (Top 2 Score)	93%	89%	94%	95%	90%	92%	94%
Very Good	33%	23%	33%	43% <sub>BC</sub>	28%	41% <sub>EG</sub>	29%
Good	60%	66% <sub>D</sub>	61%	52%	62%	52%	65% <sub>F</sub>
Poor	5%	5%	5%	4%	6%	6%	3%
Very Poor	1%	3%	1%	-	1%	1%	2%

Letters in the lower right hand corner indicate a significantly higher score than the segment with the associated 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 2016 (n=500).

#### TOP MENTIONS FOR OVERALL QUALITY OF LIFE

As seen earlier, an overwhelming majority of residents (93% or n=465) perceive the quality of life in the city as good. The main reasons provided are because there is lots to do, it is a good/friendly city, and because it is a safe city. Since 2015, fewer residents mention affordable living. Few residents (n=29) think the quality of life is poor, with the most common reasons being poverty/homelessness, unemployment and lack of jobs, followed by high prices for utilities/ groceries and wages (being mostly at minimum wage).

Why Quality of Life is Good

Lots to do (Events, activities, amenities, culture, entertainment, etc)  Good /Friendly/ Nice City  Safe city/ Low crime Right size/ Not too big Environment - Clean, green, beautiful  Ovality of life / Good standard of living / Potter then either sities	17% 20% 16% 12%
Good /Friendly/ Nice City  Safe city/ Low crime Right size/ Not too big Environment - Clean, green, beautiful Quality of life/ Good standard of living/ Better than other cities  18%  10%  10%  10%	20% 16% 12%
Safe city/ Low crime Right size/ Not too big Environment - Clean, green, beautiful Quality of life/ Good standard of living/ Better than other cities 17% 10% 10% 10%	16% 12%
Right size/ Not too big Environment - Clean, green, beautiful Quality of life/ Good standard of living/ Better than other cities  10% 10% 10%	12%
Environment - Clean, green, beautiful 10%  Quality of life/ Good standard of living/ Better than other cities 10%	
Quality of life/ Good standard of living/ Better than other cities 10%	12%
	10%
	7%
Good services (police/fire)/ Social programs 9%	8%
Convenience - Everything you need is here 8%	10%
Good income/ Have a job here 8%	6%
Healthcare 8%	5%
No issues/ Problems 6%	5%
Easy to get around (not over-crowded) 5%	3%
Affordable living 5%	11%
Good schools 5%	6%
Pleasant neighbourhood(s) 5%	3%
New Council/ fresh ideas/ well managed 4%	n/a
Good housing market 4%	n/a
Used to it/ I already live here 4%	4%

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=465); Overall quality of life poor/ very poor (n=29\*\*)

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

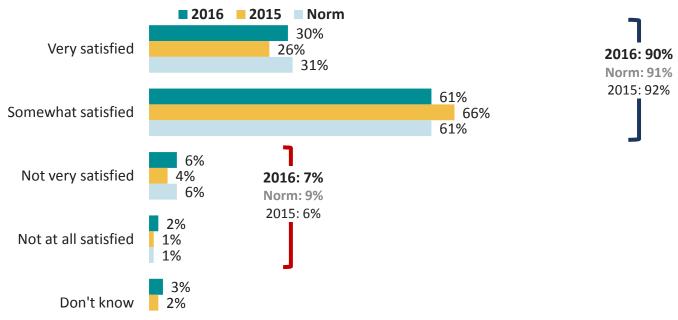
\*\*Very small sample size

## 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 (61%) and three-in-ten being very satisfied.

Overall satisfaction, including the proportion who are very satisfied, with London City services is on par with the Canadian National Norm. There are no significant differences across demographic subgroups in the proportion who are very satisfied with the overall level of City services.



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...?

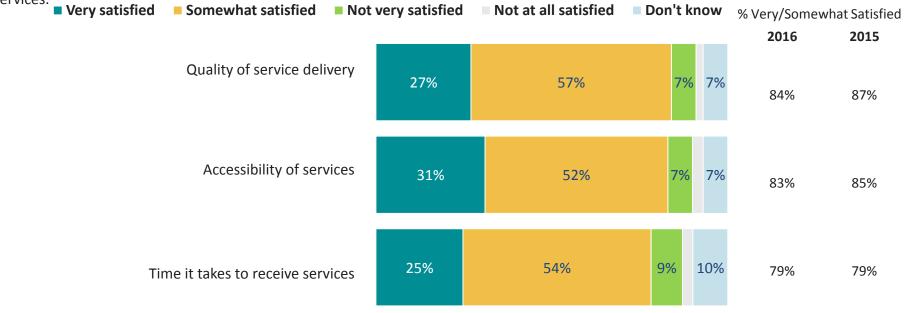
Base: All respondents 2015 (n=500); 2016 (n=500). © 2016 lpsos

lpsos

#### 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 continue to be 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.

There are no significant differences across demographic subgroups in the proportions who are very satisfied with various aspects of City services.



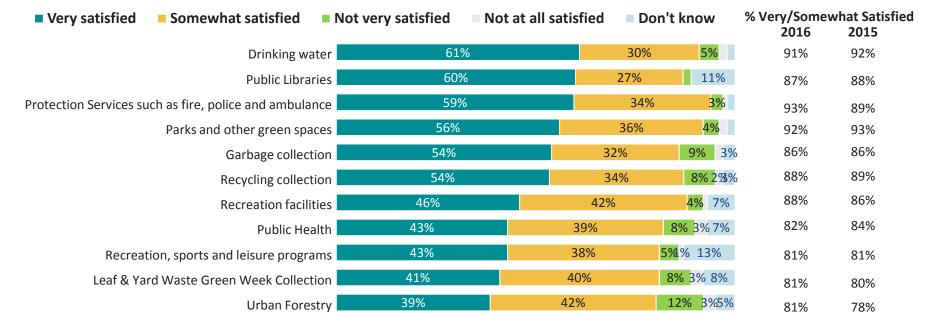
Q4. Please tell me how satisfied you are with the overall level of City services provided by the City of London on a scale of very satisfied, somewhat satisfied, not very satisfied and not at all satisfied? And how about...?

Base: All respondents 2015 (n=500); 2016 (n=500). © 2016 lpsos \*Please note that ratings less than 3% are not labelled on the graph.



#### 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 29 of 34 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, parks and green spaces, garbage collection, and recycling collection. 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.



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.

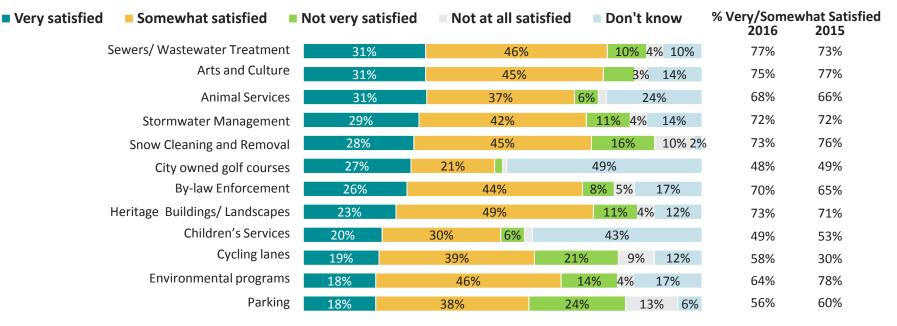
Base: All Respondents 2015 (n=500); 2016 (n=500). © 2016 lpsos

\*Please note that ratings less than 3% 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 sewers, arts and culture, animal services, stormwater management, snow clearing and removal. One-quarter of residents are *very satisfied* with City owned golf courses, by-law enforcement and heritage buildings/landscapes, and two-in-ten are *very satisfied* with children's services, cycling lanes, environmental information and parking. However, 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.



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 2015 (n=500); 2016 (n=500). © 2016 lpsos



<sup>\*</sup>Please note that ratings less than 3% are not labelled on the graph.

<sup>\*\*</sup>Was 3 separate categories in 2015

#### SATISFACTION WITH INDIVIDUAL SERVICES (End of list)

About one-in-ten are satisfied with long term care, economic development, public transit, planning for improvements to core areas, planning to manage growth, land use planning, social/ affordable housing, planning to control the quality of development, social services, building permits and roads. Sizeable proportions of between one-quarter and half are unable to offer a satisfaction score for social/ affordable housing, social services and building permits. In these areas, this may be a product of infrequent exposure to or use of these programs. Since 2015, overall satisfaction is down by 10 points in the area of public transit.

Very satisfied Somewhat satisfied	Not very	satisfied No	ot at all satis	sfied	Don't kno	w %	Very/Some 2016	what Satisfied 2015
Long term Care	15%	36%		<b>15%</b> 5%	6 29	%	51%	48%
Economic Development	14%	46	%	2	23%	10%	60%	58%
Public Transit	14%	37%		19%	8%	22%	50%	60%
Planning for improvements to core areas of the City like Downtown, Old East Village and SoHo	13%	45%		219	% 8%	13%	58%	n/a
Planning to manage the growth of the City	13%	45%		219	% 10%	6 11%	57%	n/a
Land Use Planning	13%	41%		21%	8%	17%	54%	50%
Social/ Affordable Housing	13%	34%	18	3% 79	% 2	7%	47%	46%
Planning to control the quality of development in the City	12%	45%		24	<mark>%</mark> 6%	13%	58%	n/a
Social Services	12%	39%	1	L4% 6%	29	%	51%	52%
Building Permits	11%	29%	<b>7</b> % 5%		47%		41%	39%
Roads	10%	44%		32	2%	14%	54%	53%

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 2015 (n=500); 2016 (n=500). © 2016 psos

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



## GAP ANALYSIS

#### **USING THE GAP ANALYSIS**

- The Gap analysis that follows (p. 26) 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 relatively less important, 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 to be to maintain satisfaction levels.

#### **UNDERSTANDING THE GAP ANALYSIS**

#### Primary areas for improvement are:

• Roads	Land Use Planning	Economic     Development	Public Transit
Planning to Manage Growth	• Parking	Cycling lanes	Planning for Improvements to Core Areas

Roads, land use planning, economic development, public transit, planning to manage growth, parking, cycling lanes, and planning for improvements to core areas 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.

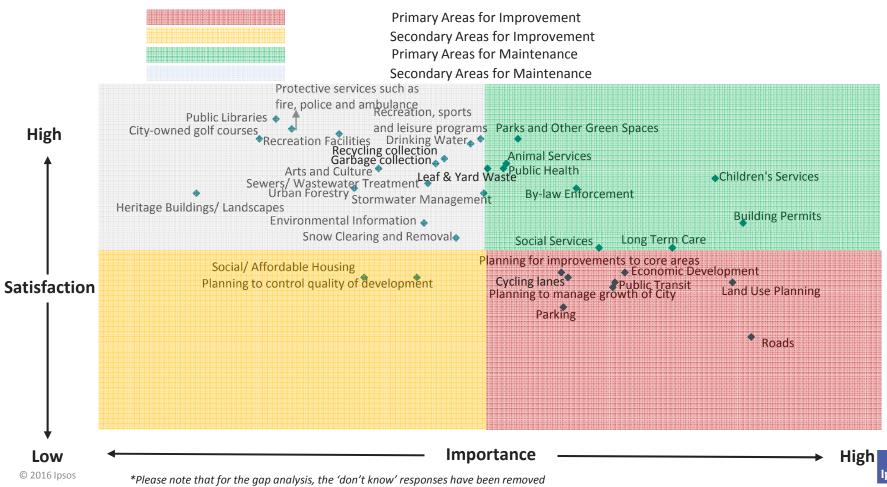
#### Secondary areas for improvement are:

•	Planning to Control Quality of Development	•	Social/ Affordable Housing
---	--	---	----------------------------

Additional services that fall within the secondary area for improvement that should be areas of focus include: planning to control quality of development and social/affordable housing.

lpsos

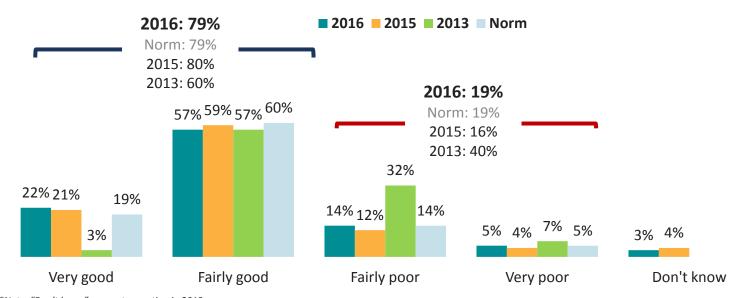
#### **GAP ANALYSIS**



## 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. After a sharp increase between 2013 and 2015 in the proportion who believe the value for tax dollars is very good, this figure has remained essentially unchanged in 2016. Similarly, after a sharp decline in the same time period in the number who think they are receiving a fairly poor value for tax dollar, this figure is essentially unchanged in 2016. The perceived value for tax dollars for the City of London is on par with the National Norm.



<sup>\*\*</sup>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); 2016 (n=500). © 2016 lpsos



#### **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 those who have lived in London 20 years or longer.

#### **Value for Tax Dollars**

	Total	Years in London	
	Total	<20 years	20+ years
	А	В	С
Sample size =	500	105	320
Good (Top 2 Score)	79%	81%	78%
Very Good	22%	14%	24% <sup>B</sup>
Fairly Good	57%	68%	54%
Fairly Poor	14%	12%	15%
Very Poor	5%	5%	5%

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

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?)

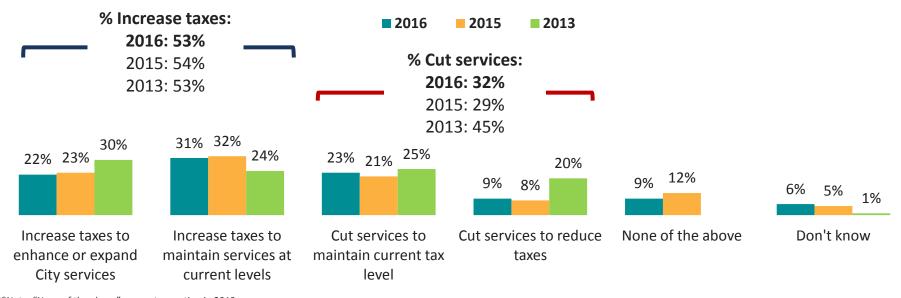
Base: All respondents 2016 (n=500).

lpsos

ABCD

#### **BALANCE OF TAXATION AND SERVICES**

In balancing taxation and service delivery levels, residents would rather the City of London increase taxes (53%) rather than cut services (32%). 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 (31% vs. 22%). 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 (23% vs. 9%). More than one-in-ten do not choose any of these options or offer no opinion. These figures have not changed significantly from 2015.



<sup>\*\*</sup>Note: "None of the above" was not an option in 2013

© 2016 lpsos

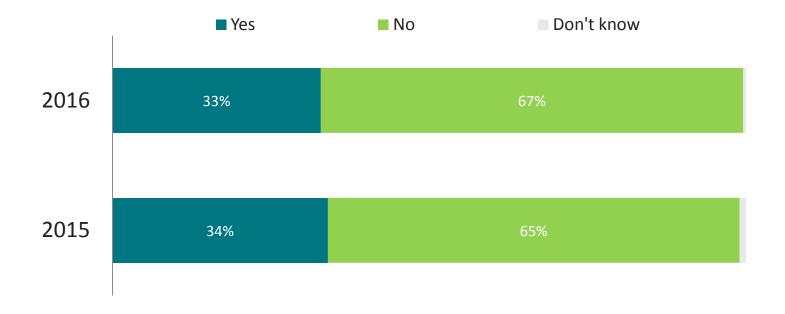
Q7. Municipal property taxes are the primary way to pay for services provided by the City of London. To help the City of London balance taxation and service delivery levels, which of the following four options would you most like the City to pursue?

Base: All respondents 2013 (n=501); 2015 (n=500); 2016 (n=500).

# EXPERIENCE & SATISFACTION WITH CITY STAFF

#### **CONTACT WITH CITY IN LAST 12 MONTHS**

One-third of residents continue to indicate 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 2015 (n=500); 2016 (n=500)

\*Please note that ratings less than 3% are not labelled on the graph.
© 2016 |psos

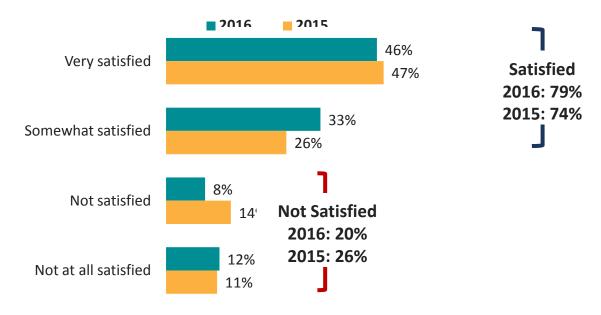


#### SATISFACTION LEVELS AMONG THOSE WHO HAD CONTACT WITH THE CITY

Eight-in-ten residents who had contact with the City were satisfied with the overall service that they received – about half of which were very satisfied.

Among those who contacted the City, those aged 35 and older are significantly more likely than those aged 18 to 34 to be very satisfied with their service experience.

Overall satisfaction levels with services received are on par with the National Norm (although continues to be 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...

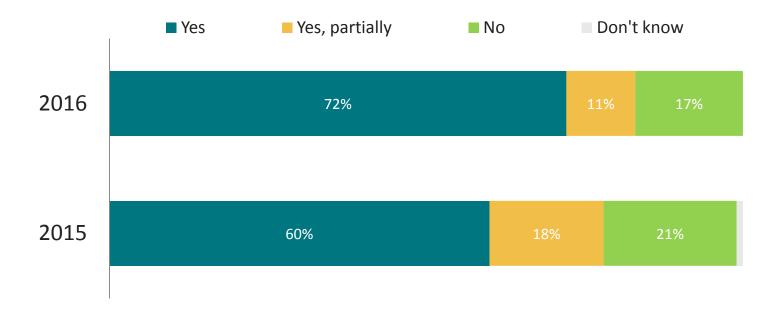
Base: Contacted the City of London 2015 (n=172); 2016 (n=166).

© 2016 |psos



#### RECEIVED NEEDED SERVICE OR SUPPORT

Among those residents who had contact with the City, seven-in-ten say they received all of the service or support they needed. Another one-in-ten say they partially received what they needed, while about two-in-ten say they did not receive the service or support that they required. Since 2015, there has been a significant increase of 12 points in the number who say they received all of the service or support they needed.

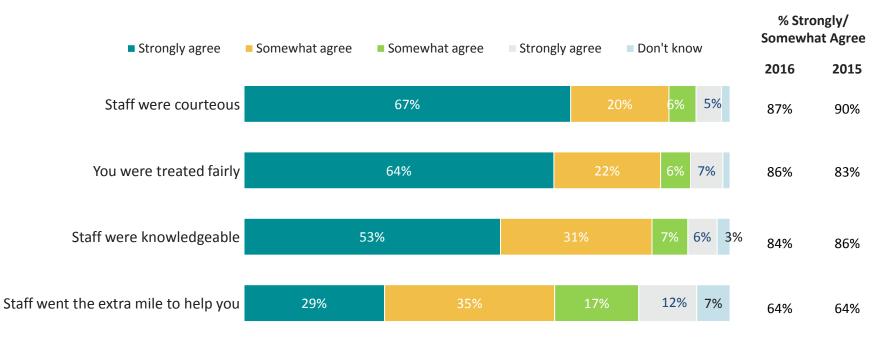


Q10. In the end, did you receive the service or support you needed? Base: Contacted City of London 2015 (n=172); 2016 (n=166). © 2016 lpsos

<sup>\*</sup>Please note that ratings less than 3% are not labelled on the graph.

#### 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 more than six-in-ten, agree that City staff went the extra mile to help them get the services and support they needed. These figures have not changed significantly since 2015.



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=Varies). © 2016 Ipsos

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

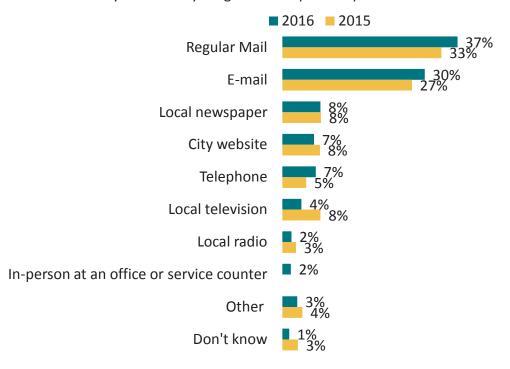


## COMMUNICATIONS

#### PREFERRED METHOD OF RECEIVING INFORMATION FROM CITY

Regular mail (37%), followed by e-mail (30%) are the most preferred methods for receiving information from the City of London. Mention of local television is down significantly by four points since 2015.

Residents under the age of 55 are significantly more likely than their older counterparts to prefer to receive information via email, while residents 35 and older are more likely than their younger counterparts to prefer to receive information via a local newspaper.



QC1. Thinking about your information needs, what is your preferred method for receiving information from the City of London? Base: All respondents 2015 (n=500; 2016 (n=500). © 2016 |psos

#### 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 almost seven-in-ten residents choosing this method of contact. Two-in-ten would prefer to do this via e-mail. Women are more likely than men to prefer contacting the City via email.

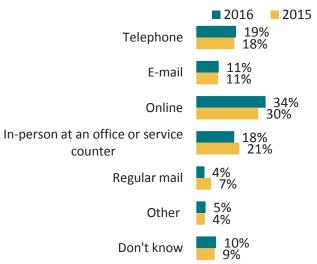
When it comes to conducting business with the City, residents are more divided but the largest share prefer to conduct business with the City online (34%), followed by telephone (19%) and in-person (18%). Women are more likely than men to prefer to conduct business with the City over the telephone. Residents under the age of 55 are more likely than their older counterparts to prefer to conduct business with the City online, while those aged 35 and older are more likely than their younger counterparts to prefer to conduct business via regular mail.

#### Contacting the City with an inquiry or concern

# Telephone E-mail Online In-person at an office or service counter Regular mail Don't know 2016 2015 2013 67% 68% 49% 49% 18% 27% 14% 14% 27% 14% 27% Don't know 2%

QC2. And, what is your preferred method of [insert]?
Base: All respondents 2013; (n=501); 2015 (n=500); 2016 (n=500).
© 2016 lpsos

#### Conducting business (such as bill payments, service registration and permits) with the City

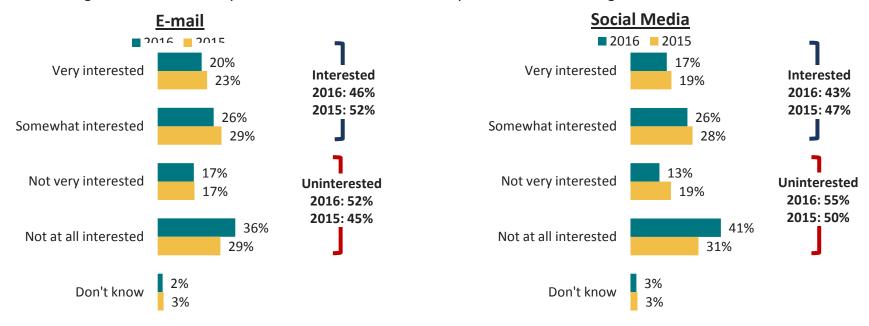


#### LEVEL OF INTEREST IN RECEIVING COMMUNITY INFORMATION

About half of residents are interested in receiving information from the City about their community, including services, programs and events, via e-mail. This proportion is down marginally (within the margin of error) and the number who are uninterested is up significantly by seven points.

More than four-in-ten are interested in receiving community information from the City via social media; this figure has not changed significantly from 2015.

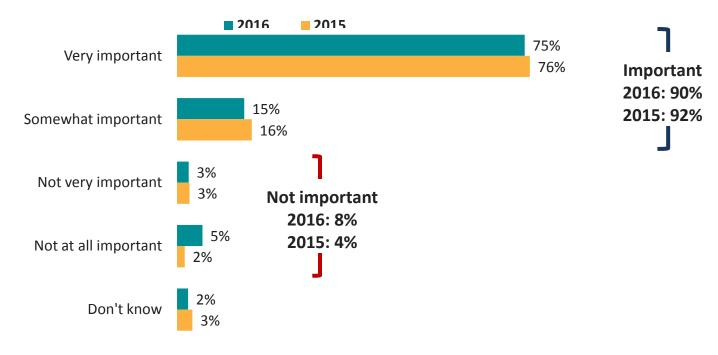
Those under the age of 55 are more likely than those 55 and older to be very interested in receiving this information via social media.



QC3. How interested are you in receiving information about your community including services, programs and events via [insert]? Are you...? Base: All respondents 2015 (n=500); 2016 (n=500). © 2016 |psos

#### IMPORTANCE OF THE CITY FOLLOWING-UP REGARDING CONCERNS & COMPLAINTS

The overwhelming majority of residents continue to 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. Since 2015, there has been a significant four-point increase in the proportion who think follow-up by the City is not 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).

© 2016 |psos

### DEMOGRAPHIC PROFILE

#### **DEMOGRAPHIC PROFILE OF SURVEY RESPONDENTS**

Gender	
Male	47%
Female	53%
Age	
18 – 34	31%
35 – 54	35%
55 and over	34%
Highest Education Level Completed	
Less than high school	5%
High school graduate or equivalent	19%
Some/completed trade/technical school	2%
Some/completed community college	24%
Some/completed university	29%
Graduate/professional studies	17%
Annual Household Income Before Taxes	
Less than \$25,000	8%
\$25,000 to less than \$50,000	13%
\$50,000 to less than \$75,000	15%
\$75,000 to less than \$100,000	11%
\$100,000 to less than \$150,000	13%
\$150,000 or more	9%

Number of People Living	in Home
One	17%
Two	42%
Three	17%
Four	13%
Five or more	9%
Number of Children Under the A	age of 18 in Home
0	70%
1-2	20%
3 or more	5%
Don't know/ Refused	5%
Number of Years Living in	n London
Less than 1 year	1%
1 to less than 5 years	5%
5 to less than 10 years	4%
10 to less than 20 years	12%
20 years or more	77%
Own or Operate a Bu	siness
Yes	8%
No	91%
Don't know	1%
Rent or Own Hon	ne
Own	78%
Rent	20%
	Insos 43

© 2016 lpsos 4

#### **Contacts**

**Diana MacDonald** 

Director

#### **ABOUT IPSOS**

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multispecialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist – NYSE – Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

#### **GAME CHANGERS**

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

"GAME CHANGERS" – our tagline – summarises our ambition.