TO:	CHAIR AND MEMBERS STRATEGIC PLANNING AND PRIORITIES COMMITTEE MEETING OF AUGUST 21, 2017
FROM:	MARTIN HAYWARD CITY MANAGER
SUBJECT	2017 CITIZEN SATISFACTION SURVEY

RECOMMENDATION

That, on the recommendation of the City Manager, the following report on the City of London 2017 Annual Community Survey **BE RECEIVED** for information.

PREVIOUS REPORTS PERTINENT TO THIS MATTER

- Item 2, Corporate Services Committee, February 5, 2013, *Community Pulse Check*
- Item 2, Strategic Priorities & Policy Committee, *2013 Community Survey,* December 16, 2013
- Item 2, Strategic Priorities & Policy Committee, *2015 Annual Community Survey,* August 31, 2015
- Item 4, Strategic Priorities & Policy Committee, *2016 Annual Community Survey,* July 25, 2016

BACKGROUND

Council's 2015-2019 Strategic Plan makes a commitment to "Open, accountable and responsive government." This includes a strategy to "Make community engagement a priority. Make the public a partner who has access to our information and helps make decisions with Council." Survey research is one way to support this strategy, by seeking the perspectives and perceptions of the public to help inform the work of the City.

The City of London conducts citizen satisfaction surveys on an annual basis. These surveys are one of many tools the City uses to measure performance. Other tools include ongoing internal performance measurement processes (e.g. strategic planning, budgeting, business planning, operational activities within each Service Area), participation in sector benchmarking initiatives (e.g. the Municipal Benchmarking Network of Canada, the Financial Information Return), and through external assessments (e.g. Macleans Best Places to Live reports).

This report presents the results of the 2017 Citizen Satisfaction Survey, put into context based on past years' results.

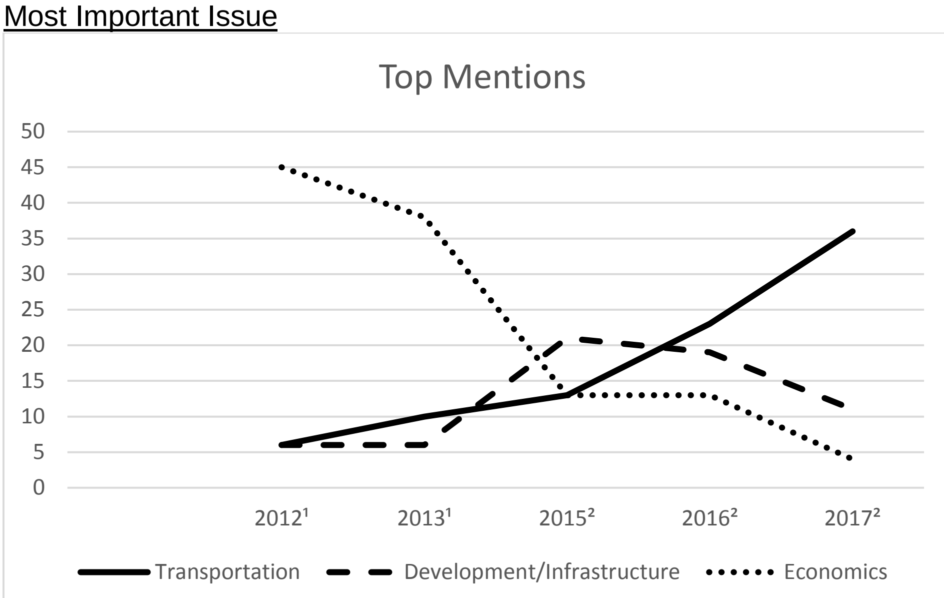
As with all survey data, results should be taken in context with an appreciation for its limitations. Public perceptions and survey results can be influenced by media that is prominent at the time of the survey. Survey results provide point in time insight into a community, best understood in the context of other available information.

DISCUSSION

2017 Survey Results
The 2017 Annual Community Survey was conducted by Ipsos between May 23 and June 2, 2017. The results of the survey are attached as **Appendix A**. The survey explored top of mind issues, overall impressions of quality of life, perception of services and tax dollars, and more. The survey is intended to provide a representative sample of Londoners. Respondents, selected by random sample, almost perfectly reflects gender and age, and have similar demographics regarding income and the number of people living in the home. Most demographic variance falls within education level and in the number of children living in the home. There is overrepresentation of respondents who are more highly educated and who do not have children living in the home. A detailed demographic profile analysis is included in **Appendix B**.

Survey Results & Trends
Trends are compared amongst the five years that a community survey has been conducted in London – 2012, 2013, 2015, 2016 and 2017. However, research in 2012 and 2013 was conducted online by a different vendor, using slightly different survey questions. As a result, there should be some caution used in comparing the online and telephone data because of these methodological differences in data collection approaches. When possible, survey results are also compared to Ipsos' National Norm, which is not available for the 2012 and 2013 data.

Most Important Issue

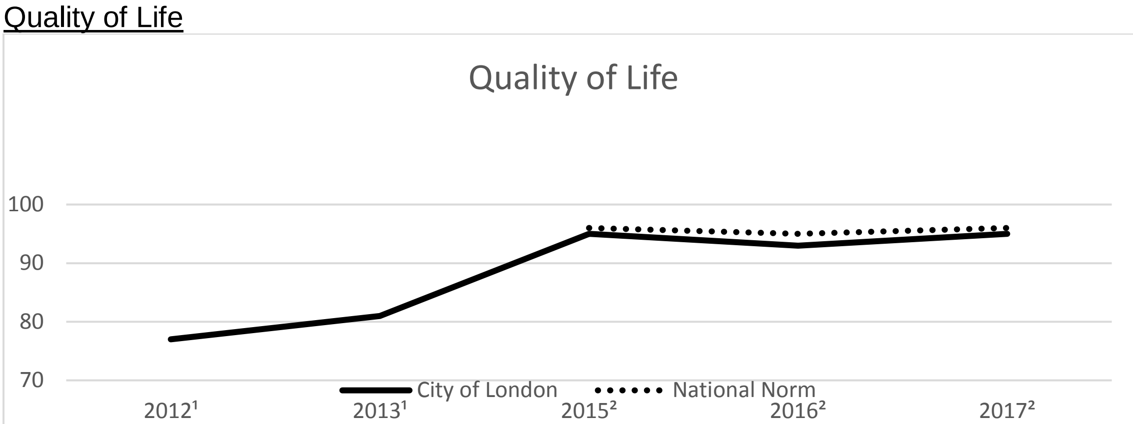


[1]Survey Question 2012-13: "What, in your opinion, is the single most important local problem facing London today?"
[2]Survey Question 2015-17: "In your view, what are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council?"

Transportation and *Development/Infrastructure* are mentioned as the most important issues facing the City of London, and more specifically, *transportation* is being mentioned with increasing importance. These mentions are consistent with National Norms.

The major focus on rapid transit in the media before the survey went to field likely influenced the spike in transit as the top issue facing the City, but this is also part of an overall trend towards more community interest in transit and transportation (13% in 2015, 23% in 2016, 36% in 2017).

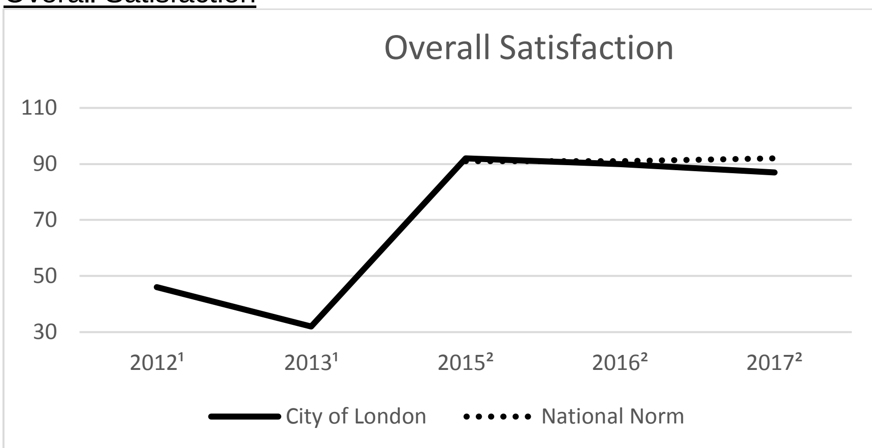
Quality of Life



[1]Survey Question 2012-13: "Overall, how would you rate the quality of life in your municipality?"
[2]Survey Question 2015-17: "How would you rate the overall quality of life in London today?"

95% of Londoners believe that quality of life is *good*, which is on par with the National Norm of 96%, although *very good* ratings are lower than the National Norm. Older adults are more likely to report very good quality of life. *Lots to do* and *good/friendly/nice city* remain the highest factors contributing to the good quality of life.

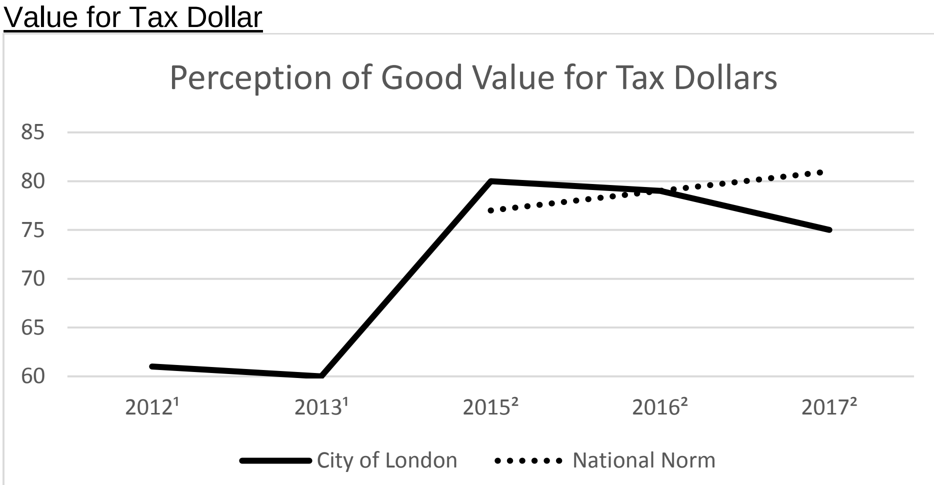
Overall Satisfaction



[1]Survey Question 2012-13: "Would you say that you are very satisfied, satisfied… with the London government?"
[2]Survey Question 2015-17: "How satisfied are you with the overall level of City services provided by the City of London on a scale of very satisfied, satisfied, …"

Most residents remain satisfied with the level of service delivery from the City, although this is slightly decreasing. Satisfaction is lower compared to the National Norm, and satisfaction is higher among residents living in London fewer than 20 years. Residents are satisfied with *quality* and *accessibility of services*, and although they are satisfied with *timeliness of service delivery*, this figure has decreased.

Value for Tax Dollar



[1]Survey Question 2012-13: "Would you say that overall, you receive very good, good,… value for your tax dollars?"
[2]Survey Question 2015-17: "Would you say that overall you get good value or poor value for your tax dollars? (Is it very or fairly good/poor value?)"

Most residents have a good perception of value for tax dollars, although this proportion has slightly decreased (80% in 2015, 79% in 2016, 75% in 2017). However, residents who perceive a *very good* value for tax dollars has decreased and is lower than the National Norm. Residents who have lived in London for less than 20 years perceive a better value for their tax dollar.

Contact & Communications

More residents are contacting the City, and of these residents, most are satisfied with the service that they received and report that staff were courteous, treated them fairly, were knowledgeable and went the extra mile to help. However, the number of residents reporting that they *received all of the support* that they required has decreased.

Gap Analysis Trends

Service Area for Improvement	Year		
	2015	2016	2017
Land Use Planning	Primary	Primary	Primary
Economic Development	Primary	Primary	Primary
Roads	Primary	Primary	Primary
Public Transit	Primary	Primary	Secondary
Planning to Manage Growth	N/A	Primary	Primary
Planning for Improvements to Core Areas	N/A	Primary	Primary
Cycling Lanes	Secondary	Primary	N/A
Parking	Secondary	Primary	Secondary
Social Services	Secondary	N/A	Primary
Long Term Care	Secondary	N/A	Primary
Planning to Control Quality of Development	N/A	Secondary	Primary
Social/Affordable Housing	Secondary	Secondary	Secondary
Building Permits	N/A	N/A	Secondary

The GAP analysis that has been included in the Citizen Satisfaction Survey over the past three years has created a means of trend analysis for the service areas being identified for improvement. Primary areas for improvement have high derived importance scores and are therefore the strongest drivers of satisfaction with the City's overall level of service.

Areas for Improvement

Land use planning, economic development and roads have been identified as primary areas for improvement in all three years.

Planning staff recently gained significant public input through the ReThink London process, in which Londoners made clear that they desire change in the way that the City is planned. The community expressed concerns regarding growth management, transportation and transit, the state of Downtown, environmental protection, and the quality of development that is being yielded in London. As such, the City worked with the community to develop The London Plan, which aims to change the approach to planning in London. It takes a more deliberate approach to growth management with a new urban structure plan and clear goal of promoting infill and intensification and core area regeneration. It also takes a place-based approach, where the quality of growth and development is key to building a great city. Several initiatives have followed these thrusts of the Plan, including the approved Downtown Master Plan, the plans for Dundas Place, Back to the River, the Growth Management Implementation Strategy, new practices for engaging the public in planning processes and new policies in The London Plan regarding urban design. These improvements are beginning to be implemented.

In order to improve understanding about the concerns that residents express in regards to land use planning, additional qualitative research may be undertaken. This research will help determine whether residents are informed of the land use planning practices that London uses, and if so, what specific concerns they have. Research could take place in the form of Ideation sessions that leverage on technology to facilitate high energy brainstorming, integrated thinking and in-depth issue examination. Participants could be invited to input their initial reactions, thoughts and ideas anonymously into an online space (designed for the project) and then engage in a discussion moderated by an experienced qualitative researcher. The group as a whole can refer back to their initial thoughts as well as those of other participants during the discussion.

Economic development is being addressed through development of the London Community Economic Road Map, a strategy that is founded on the values of alignment, engagement and partnership. This strategy is identifies local strengths and weaknesses, prioritizes economic opportunities and presents an action plan to maximize economic success. This Road Map will help guide the activities of the City and partner organizations over the short, medium, and long term time horizon. Its priorities are to create a city for entrepreneurs; a supportive business environment; an exceptional downtown, a vibrant urban environment; a top quality workforce; and a national Centre of Excellence for medical innovation and commercialization. Achieving these goals will help grow the economy and make the City and region an even better place to live and work.

Roads has also been consistently recognized as an area for improvement. Similarly, public transit was a primary area for improvement in 2015 and 2016 but dropped down to a secondary area for improvement in 2017. Although in 2017 it was identified as being less important, satisfaction levels for this service remain low.

In London, the Transportation Master Plan (TMP) is the guiding document used to determine transportation needs today and in the future, and identifies improvements and opportunities for more sustainable transportation. These include improved transit through the introduction of Bus Rapid Transit (BRT) corridors and increased emphasis on nonautomotive travel such as walking and cycling. Public transit is being addressed through *Shift,* an initiative focused on improving mobility options for residents, which focuses on Rapid Transit as part – along with cars, buses, bikes and pedestrians – of the transportation system that will help the City grow and prosper.

Social / affordable housing has been consistently identified as a secondary area for improvement from 2015 to 2017.

In a follow up review of ten municipalities (using research conducted within the past two years), Ipsos identified the following commonalities on areas for improvement: roads, land use planning, community planning, public transit, parking and social/affordable housing. This demonstrates that London's identified areas for improvement are common across communities.

Live Music Events

Each year the survey includes a top of mind question that is used to inform service delivery on a specific issue. This allows service areas to leverage the administration of a large survey to get representative information about a specific issue or service. This year, residents were asked to rate the importance of live music events such as festivals in Victoria Park and Canada Day celebrations. The survey found that the vast majority of residents (89%) believe that free, publically accessible live music events are important. This result aligns closely with resident's top mentions for why the overall quality of life in London is good, namely, that there is "lots to do (events actives, amenities, culture and entertainment)".

CONCLUSION

Surveys are an important tool used by municipalities to assess residents' attitudes, needs, priorities and satisfaction levels. This data can support Council decision-making, inform the work of Administration, and contribute to an overall understanding of the London community. The 2017 results demonstrate that Londoners' satisfaction remains high. It also suggests that a number of initiatives included in Council's Strategic Plan such as Rapid Transit, Service London and the London Music Strategy address important issues to Londoners. Citizens report a high quality of life and overall satisfaction with City services. The survey also offers insights into areas where satisfaction is lower or declining, trends which will be followed closely in future years. The survey represents one more way in which the City of London strives towards "Open, accountable and transparent government" in the service of Londoners.

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cc. Senior Leadership Team
Operations Management Team

APPENDIX A

Ipsos Public Affairs

City of London

2017 Citizen Satisfaction Survey
Draft Report

June 23, 2017

CONTENTS

OBJECTIVES

- Ipsos is pleased to present the City of London with the results of the 2017 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 23 and June 2, 2017.
- 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, 2016 and 2017 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 (1)

Transportation is now the top issue of focus for residents.

Mentions of transportation as the issue that should receive the greatest attention from the City are almost four times higher than recorded four years ago (36%, up from 23% in 2016, 13% in 2015 and 10% in 2013). However, the increase in the 2017 survey is focused on the City's rapid transit initiative (14%, not mentioned in 2016). In a distant second place is development and infrastructure (11%, down from 19% in 2016). (see p.11).

Overall quality of life scores remain on par with National Norm.

An overwhelming majority (95%) 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 (31%) who say "very good." (see p.13)

Satisfaction with the level of City services has slipped below the National Norm.

A vast majority (87%) remain satisfied with the overall level of City services, including 25% who are very satisfied. However, both figures are now significantly below the National Norm. Most residents continue to be somewhat satisfied (62%). (see p.17)

Perceptions of timeliness of service are down over the past year.

Large majorities of residents continue to be satisfied with the quality, accessibility and the time it takes to receive service from the City. However, perceptions of timeliness are down significantly (71%, down from 79% in 2016), driven by those who have lived in the City 20 years or more. (see p.19)

Satisfaction is down in a number of areas, particularly leaf and yard waste green week collection, but up for children's services.

Satisfaction with most individual services is similar to 2016, with there being a significant decline in satisfaction with leaf and yard waste green week collection (see p.20), stormwater management, City owned golf courses (see p.21), planning to manage the growth of the City, planning to control the quality of development and building permits (see p.22). This decline is mainly driven by women and those who have lived in the City 20 years or more. There has been a significant increase in satisfaction with children's services (see p.21).

KEY FINDINGS (2)

Planning to manage growth, planning for improvements to Core Areas, land use planning, economic development, long term care, planning to control quality of development, social services and roads are strongest drivers of overall satisfaction.

The gap analysis (see pp. 24-26) indicates that the City should focus on planning to manage growth, planning for improvements to Core Areas, land use planning, economic development, long term care, planning to control quality of development, social services and roads, as boosting scores in these areas would have greatest impact on satisfaction with overall level of service.

A large majority continues to perceive that they are getting good value for tax dollars, but this figure is below the National Norm.

The large majority (75%) believe they are getting good value for their tax dollars based on programs and services they receive from the City, including more than one-in-ten (14%) who say they receive very good value. However, both these figures are significantly lower than the National Norm (81% and 20%, respectively). Perceptions of receiving very good value for their tax dollar is lower among those who have lived in the City for 20 years or more (see pp.28-29).

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

When presented with options, most residents prefer increasing taxes in order to maintain or expand services (55%) compared to the preference for cutting services (31%). There is some preference for increasing taxes just to maintain services (31%) rather than increasing taxes to enhance or expand services (24%). There is a clear preference for cutting services to maintain tax levels (21%) rather than residents who would cut services to reduce tax levels (10%). 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)

More residents are reporting contact with the City and a large majority of these are satisfied with their experience.

Four-in-ten residents have had contact with the City in the past 12 months, and this figure has increased significantly (42%, up from 33% in 2016) (see p.32). Among these, a large majority are satisfied (77%), including 48% who are very satisfied (see p.33). These figures are below the National Norm. Moreover, there has been a significant decline in the proportion who had contacted the City who report receiving the service or support they needed (61%, down from 72% in 2016), and this figure is now back to the proportion recorded in 2015 (see p.34).

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

Regular mail (37%), followed by e-mail (32%) 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 (66%), but less of a consensus when it comes to conducting business with the City (38% online, 21% 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 77% who see this as very important (see p.40).

Free public access to live music events is important to City residents.

Nine-in-ten believe free public access to live music events, such as festivals in Victoria Park and Canada Day Celebrations is important, including 66% who say this is very important (see p.41).

DETAILED FINDINGS

MOST IMPORTANT ISSUES: TOP MENTIONS

MOST IMPORTANT ISSUES IN LONDON – TOP MENTIONS

Focus on transportation continues to increase, with almost four-in-ten now saying it is the most important issue facing the City (up 13 points from 2016), including almost two-in-ten, who specifically mention inadequate public transit/ transportation. However, all of the increase in mention of transportation is driven by mentions of rapid transit system (both support and opposition), mentioned by a total of 14 percent. At a distant second place is development/infrastructure mentioned by one-in-ten, specifically roads or road repair and infrastructure. Compared to the national norm, London residents are less likely to prioritize economics (4% vs 9%) or taxes (3% vs 11%), as an important issue.

	2017	2016	2015	2013	Norm
NET: Transportation	36%	23%	13%	10%	31%
Inadequate public transit/transportation/TTC/Go Transit	17%	17%	10%	4%	-
Rapid transit/ support for rapid transit	10%	-	-	-	-
Opposition to rapid transit	4%	-	-	-	-
Traffic/road congestion/traffic lights	4%	5%	4%	6%	-
NET: Development/infrastructure	11%	19%	21%	6%	10%
Roads/Road repair/snow removal/poorly maintained roads	5%	9%	11%	3%	-
Infrastructure	3%	8%	7%	3%	-
Development - urban sprawl/loss of greenspace	2%	2%	3%	1%	-
NET: Poverty	5%	5%	3%	1%	-
Homelessness	4%	3%	2%	-	-
Poverty	2%	3%	1%	1%	-

	2017	2016	2015	2013	Norm
NET: Economics	4%	13%	13%	38%	9%
Unemployment/ Jobs/ poor job market	3%	12%	12%	37%	-
NET: Mayor/city gov't	4%	4%	4%	22%	-
Poor gov't/political infighting/no leadership/vision	2%	-	-	-	-
Housing - lack of affordable housing	4%	2%	2%	-	-
Taxes	3%	5%	6%	4%	11%
Drug addiction/use/rehab	2%	1%	-	-	-
Nothing	5%	4%	2%	2%	-
Don't know / Refused	12%	10%	13%	5%	-

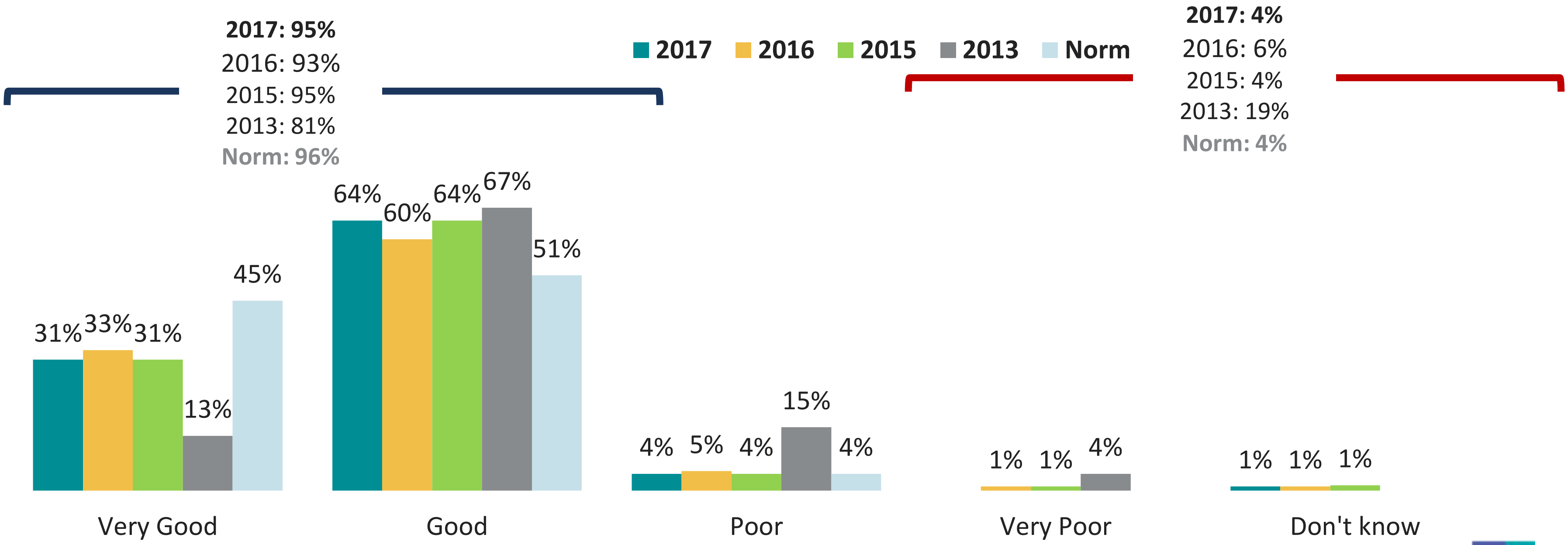
Q1. To begin, in your view, what are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? Base: All respondents 2013 (n=501); 2015 (n=500); 2016 (500) ; 2017 (500)

*Other mentions less than 2% not shown in the table.

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 compared three in ten 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 has remained relatively consistent since 2015. The overall quality of life in the City of London is on par with the National Norm (96%), however, the City continues to score significantly lower than the National Norm in the proportion who rate it as very good (31% 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); 2017 (n=500)

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 higher among those aged 55 and older.

Overall Quality of Life

	Total	Age		
	Total	**18-34**	**35-54**	**55+**
	A	*B*	*C*	*D*
Sample size =	*500*	*103*	*168*	*229*
Good (Top 2 Score)	95%	95%	95%	96%
Very Good	31%	24%	28%	41% BC
Good	64%	71% D	67% D	55%
Poor	4%	5%	4%	2%
Very Poor	-	-	1%	-

ABCD 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 2017 (n=500).

TOP MENTIONS FOR OVERALL QUALITY OF LIFE

As previously indicated, an overwhelming majority of residents (95% or n=479) 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, because it is a safe city, it is the right size, it has a clean, green and beautiful environment. Since 2016, fewer residents mention lots to do, good/friendly city, quality of life and nature trails/parks. An extremely small number of residents (n=15) think the quality of life is poor, with the most common reasons being poor downtown area and bad roads/infrastructure.

Why Quality of Life is Good

	2017	2016	2015
Lots to do (Events, activities, amenities, culture, entertainment, etc.)	13%	20%	17%
Good/Friendly/Nice City	13%	18%	20%
Safe city/ Low crime	13%	17%	16%
Right size/ Not too big	11%	10%	12%
Environment - Clean, green, beautiful	11%	10%	12%
Good income/Have a job here	9%	8%	6%
Convenience - Everything you need is here	8%	8%	10%
Good schools	7%	5%	6%
Good services (police/fire)/ Social programs	6%	9%	8%
Healthcare	6%	8%	5%
Quality of life/ Good standard of living/ Better than other cities	5%	10%	10%
Nature trails/ Parks	5%	10%	7%
Easy to get around (not over-crowded)	4%	5%	3%
Affordable living	4%	5%	11%
Used to it/Already live here	4%	4%	4%

*Please note that only top mentions of 4% or more are shown in the table.

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=479); Overall quality of life poor/ very poor (n=15**)

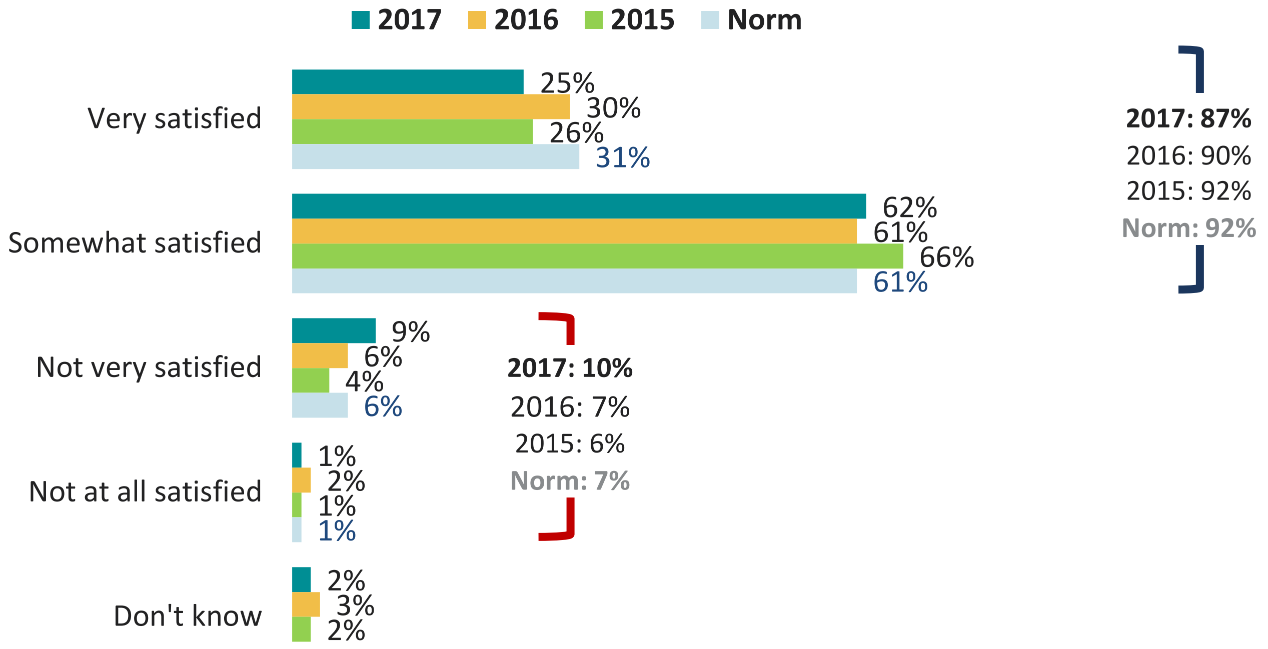
**Very small sample size

CITY SERVICES ASSESSMENT

SATISFACTION WITH THE OVERALL LEVEL OF CITY SERVICES

An overwhelming majority of London residents continue to be satisfied with the level of service delivery from the City, with most being somewhat satisfied (62%) and one-quarter being very satisfied. However, the proportion who are very satisfied is down directionally (not significantly) by 5 points.

Overall satisfaction, including the proportion who are very satisfied, with London City services is significantly lower than 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 2015 (n=500); 2016 (n=500); 2017 (n=500)

SATISFACTION WITH THE OVERALL LEVEL OF CITY SERVICES BY SUB-GROUPS

Those who have lived in London for fewer than 20 years are significantly more likely to say they are satisfied and very satisfied with the overall level of city services.

Overall Satisfaction with City Services

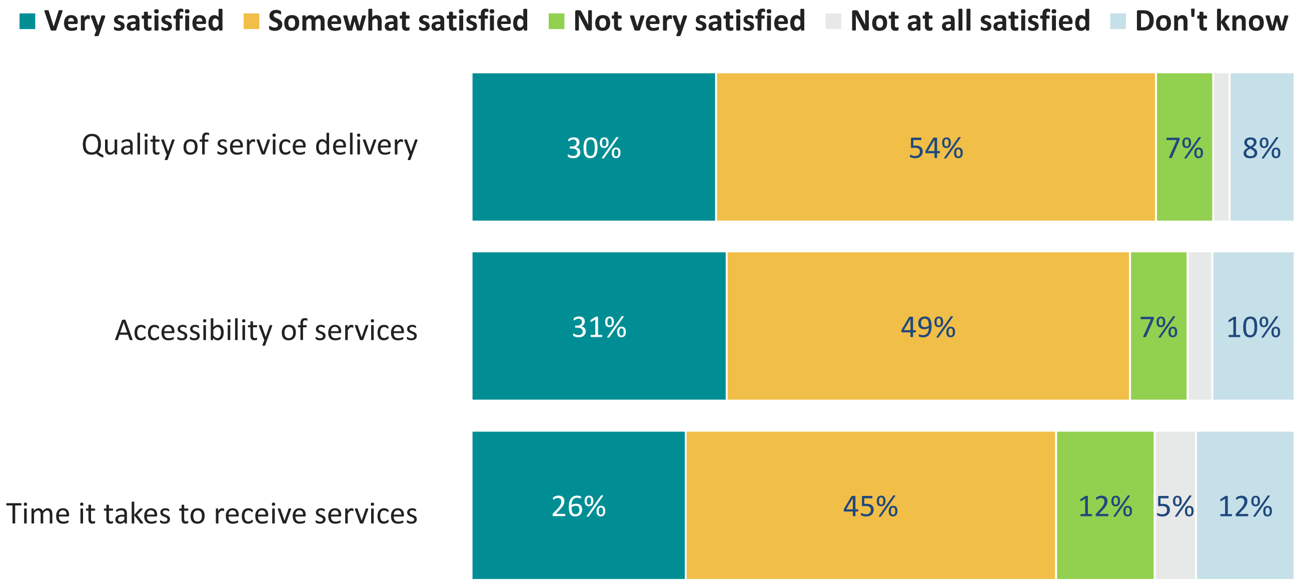
	Total	Years in London	
	Total	<20 years	20+ years
	A	B	C
Sample size =	*500*	*95*	*400*
Satisfied (Top 2 Score)	87%	93% C	85%
Very Satisfied	25%	35% C	21%
Somewhat Satisfied	62%	58%	64%
Not Very Satisfied	9%	6%	10%
Not At All Satisfied	1%	-	2%

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 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 2017 (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 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. However, this figure is down significantly by eight points from 2015. There are no significant differences across demographic subgroups in the proportions who are very satisfied with various aspects of City services.



% Very/Somewhat Satisfied

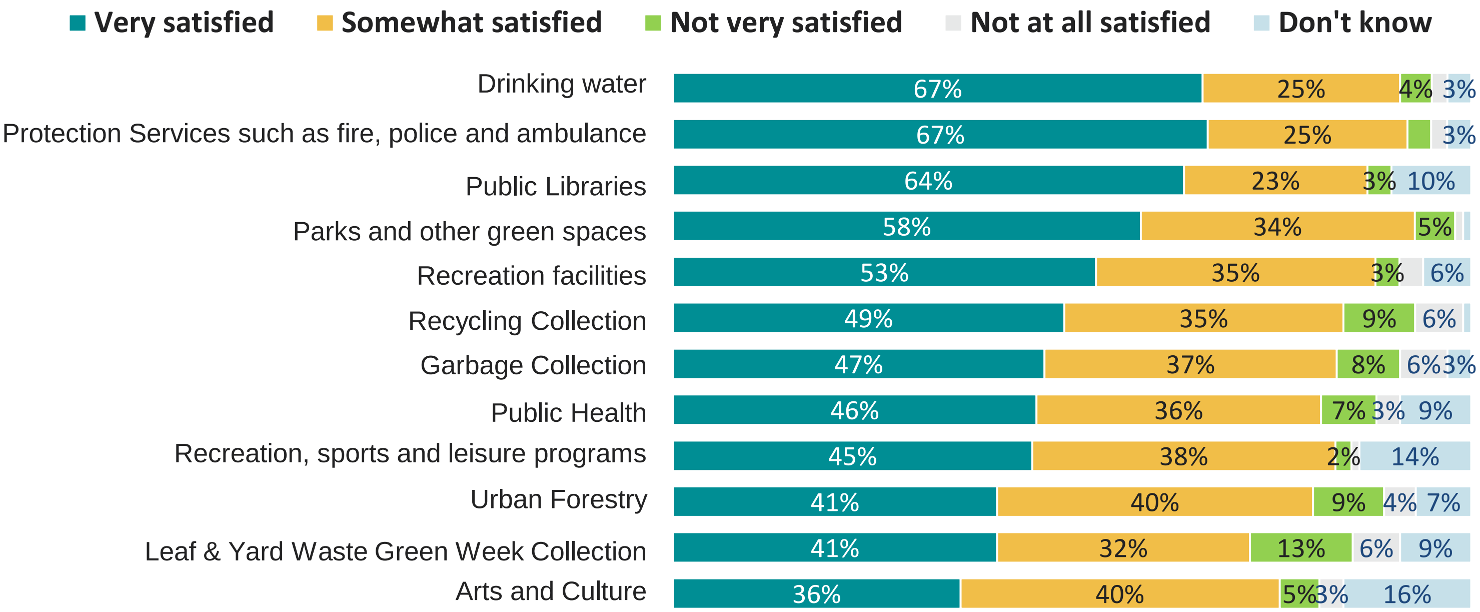
	2017	2016	2015
Quality of service delivery	84%	84%	87%
Accessibility of services	80%	83%	85%
Time it takes to receive services	71%	79%	79%

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

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); 2017 (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 33 services tested in the survey. The City services with the highest satisfaction scores, where more than half of the residents are very satisfied are: drinking water, protection services such as fire, police, and ambulance, public libraries, parks and other green spaces, and recreation facilities. Satisfaction with Leaf & Yard Waste Green Week Collection is down significantly from 2016.



% Very/Somewhat Satisfied

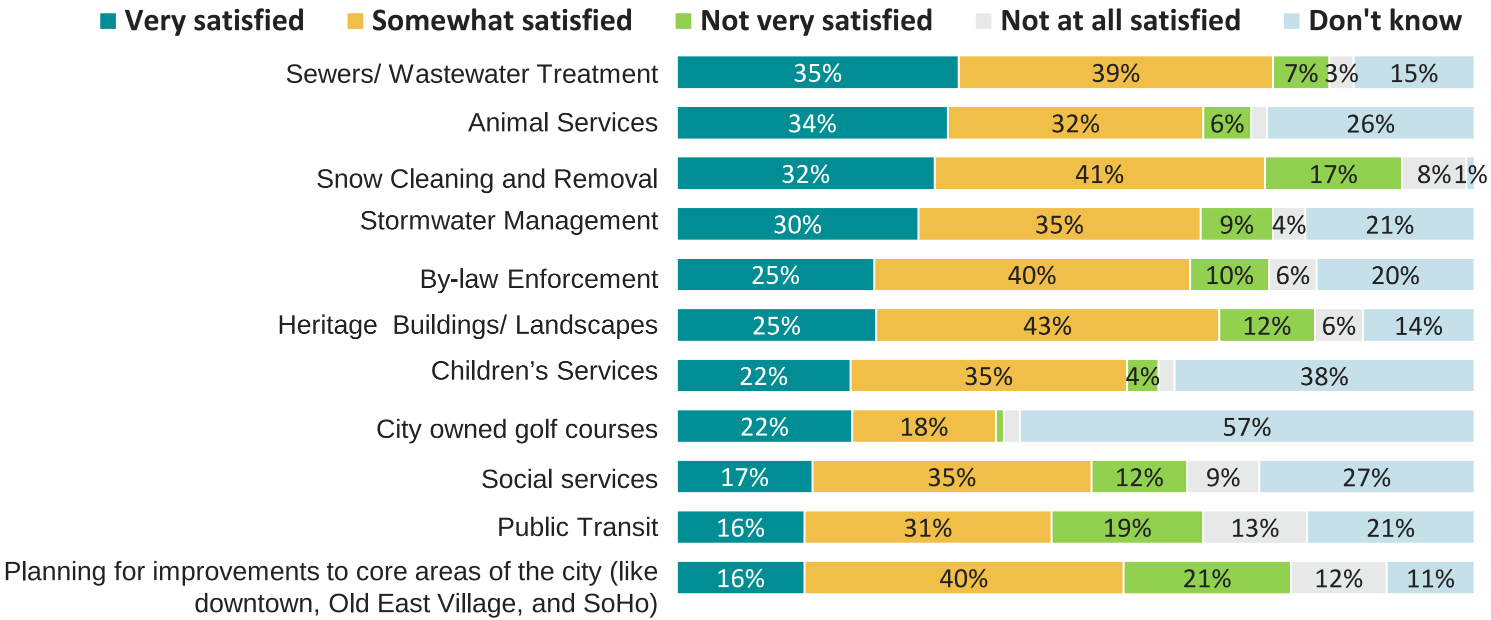
2017	2016	2015
92%	91%	92%
92%	93%	89%
87%	87%	88%
92%	92%	93%
88%	88%	86%
84%	88%	89%
84%	86%	86%
82%	82%	84%
83%	81%	81%
81%	81%	78%
73%	84%	80%
76%	75%	77%

*Please note that ratings less than 3% 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 2015 (n=500); 2016 (n=500);2017 (n=500)

SATISFACTION WITH INDIVIDUAL SERVICES (List of services continues on next slide)

About one-third of residents are very satisfied with sewers, animal services, snow clearing and removal, and stormwater management. One-quarter of residents are very satisfied with by-law enforcement and heritage buildings/landscapes, and two-in-ten are very satisfied with children's services, City owned golf courses, social services, public transit, and planning for improvements to core areas of the city. However, about six in ten residents didn't know how to rate the satisfaction on City owned golf courses, and four in ten didn't know how to rate the satisfaction of children's services. As well, about one in four residents didn't know how to rate satisfaction with social services and animal services. Fewer residents may have used these services, contributing to an increase in residents who didn't know how to rate them. Since 2016, satisfaction is down significantly for stormwater management, and City owned golf courses, and up for children's services.



% Very/Somewhat Satisfied

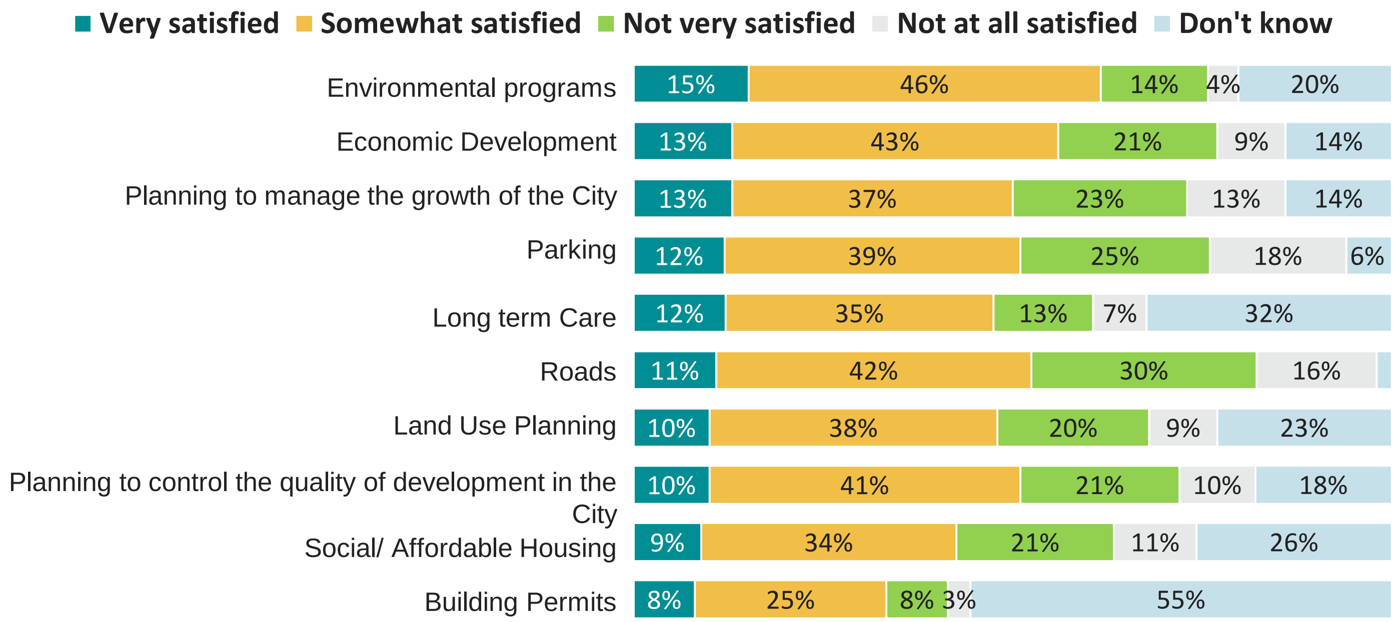
	2017	2016	2015
Sewers/ Wastewater Treatment	74%	77%	73%
Animal Services	66%	68%	66%
Snow Cleaning and Removal	73%	73%	76%
Stormwater Management	65%	72%	72%
By-law Enforcement	65%	70%	65%
Heritage Buildings/ Landscapes	68%	73%	71%
Children's Services	57%	49%	53%
City owned golf courses	40%	48%	49%
Social services	52%	51%	52%
Public Transit	47%	50%	60%
Planning for improvements to core areas of the city	56%	58%	N/A

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); 2017 (n=500)

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

SATISFACTION WITH INDIVIDUAL SERVICES (End of list)

About one-in-ten are very satisfied with environmental programs, economic development, planning to manage the growth of the City, parking, long term care, roads, land use planning, planning to control the quality of development in the City, social/affordable housing, and building permits. More than half of respondents didn't know how to rate building permits. One-third were unable to rate long term care, and one-quarter didn't know how to rate land use planning and social/affordable housing. Since 2016, satisfaction has declined for planning to manage the growth of the City, planning to control the quality of development in the City, and building permits.



% Very/Somewhat Satisfied	2017	2016	2015
Environmental programs	61%	64%	78%
Economic Development	56%	60%	58%
Planning to manage the growth of the City	50%	57%	N/A
Parking	52%	56%	60%
Long term Care	47%	51%	48%
Roads	52%	54%	53%
Land Use Planning	48%	54%	50%
Planning to control the quality of development in the City	51%	58%	N/A
Social/ Affordable Housing	42%	47%	46%
Building Permits	33%	41%	39%

*Please note that ratings less than 3% 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 2015 (n=500); 2016 (n=500); 2017 (n=500).

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 is also strategic to focus on lower importance items if the City can see potential to make a big difference.

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 in these areas, 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 scores. The focus here is on maintaining the current level of service and satisfaction.
- **Secondary Areas for Maintenance** – services with lower importance but high satisfaction scores. The focus here should to be to maintain satisfaction levels.

UNDERSTANDING THE GAP ANALYSIS

Primary areas for improvement are:

• Planning to manage growth	• Planning for improvements to core areas	• Land use planning	• Economic development
• Long term care	• Planning to control quality of development	• Social services	• Roads

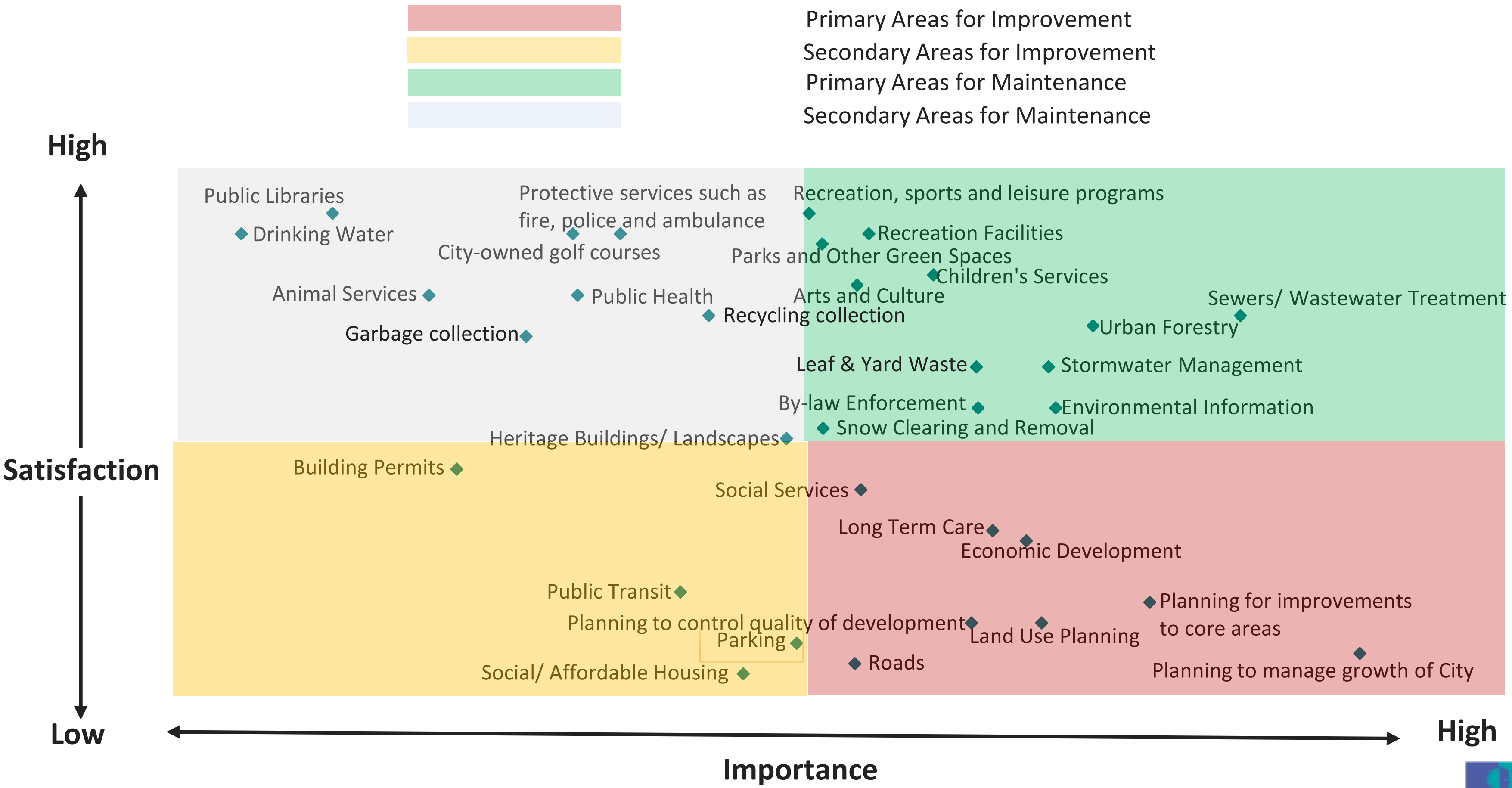
Planning to manage growth, planning for improvements to core areas, land use planning, economic development, long term care, planning to control quality of development, social services and roads should be the primary areas for improvement for the City of London. These services have high derived importance scores and are some of the strongest drivers of satisfaction with the City's overall level of service.

Secondary areas for improvement are:

• Parking	• Social/ Affordable Housing	• Public transit	• Building permits

Additional services that fall within the secondary areas for improvement that should be areas of focus include: parking, social/affordable housing, public transit and building permits.

GAP ANALYSIS

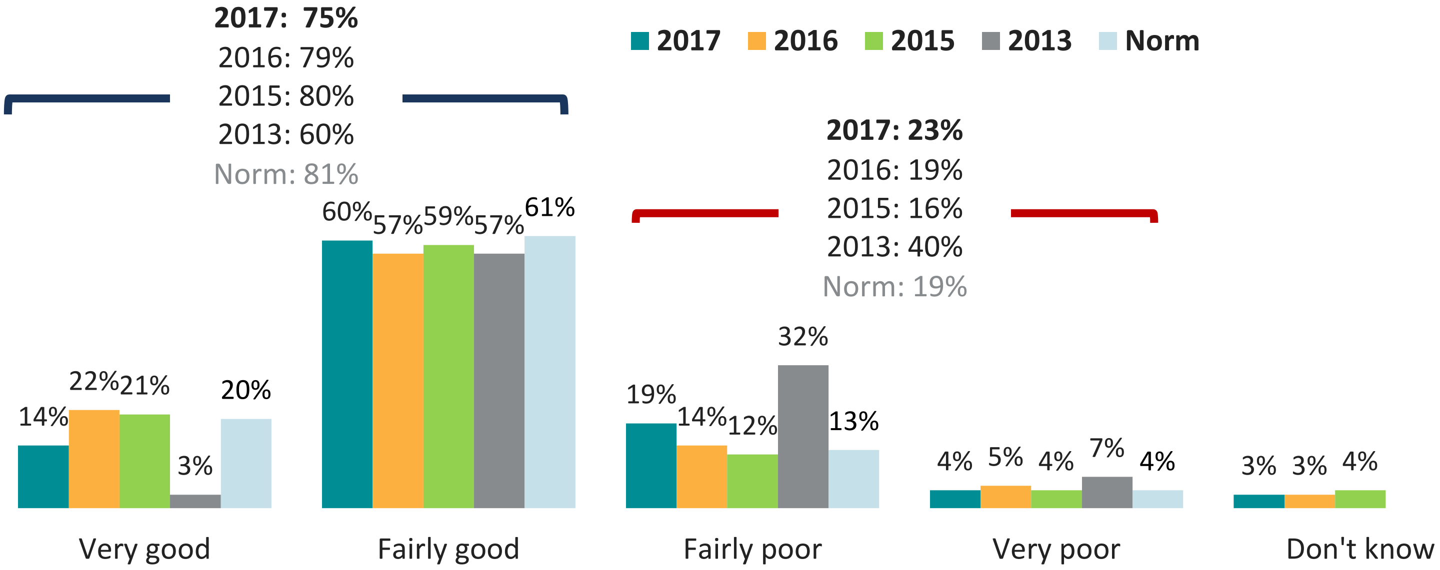


**Please note that for the gap analysis, the 'don't know' responses have been removed*

VALUE FOR TAX DOLLARS

VALUE FOR TAX DOLLARS

Three-quarters of 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 more than one-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 (from 3% to 21%), this figure stabilized between 2015 and 2016 (21% to 22%). However, this is down significantly by eight points from 2016 (22% to 14%), while still higher than the figure recorded in 2013. Similarly, after a sharp decline (32% to 12%) from 2013 to 2015 in residents who think they are receiving a fairly poor value for their tax dollar, this figure stabilized between 2015 and 2016 (12% to 14%), but is up significantly by five points from 2016 (14% to 19%). This remains significantly lower than in 2013. The perceived value of tax dollars for the City of London is significantly lower than the National Norm, including the proportion who say it is "very good."



***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); 2017 (n=500)

VALUE FOR TAX DOLLARS BY SUB-GROUPS

Those who have lived in London for fewer than 20 years are significantly more likely to say they get very good value for their tax dollars.

Value for Tax Dollars

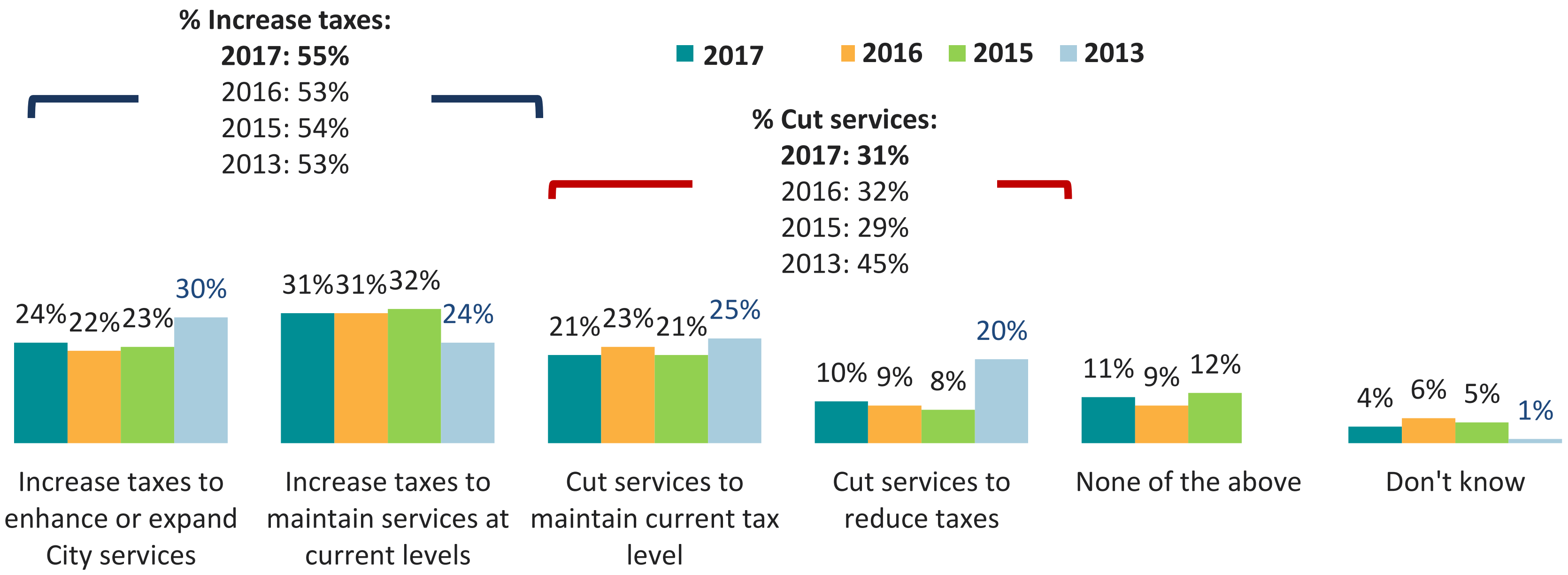
	Total	Years in London	
	Total	<20 years	20+ years
	A	B	C
Sample size =	*500*	*95*	*400*
Good (Top 2 Score)	75%	86% C	69%
Very Good	14%	24% C	10%
Fairly Good	60%	63%	59%
Fairly Poor	19%	13%	21%
Very Poor	4%	-	6%

ABCD *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 2017 (n=500).

BALANCE OF TAXATION AND SERVICES

In balancing taxation and service delivery levels, residents would rather the City of London increase taxes (55%) rather than cut services (31%). In terms of increasing taxes, there is some preference for increasing taxes to maintain services at current levels (31%) compared to increasing them to enhance or expand services (24%). There is a clear preference for cutting services to maintain the current tax level (21%) over cutting them to reduce taxes (10%). More than one-in-ten do not choose any of these options or offer no opinion. These figures have been relatively stable since 2015.



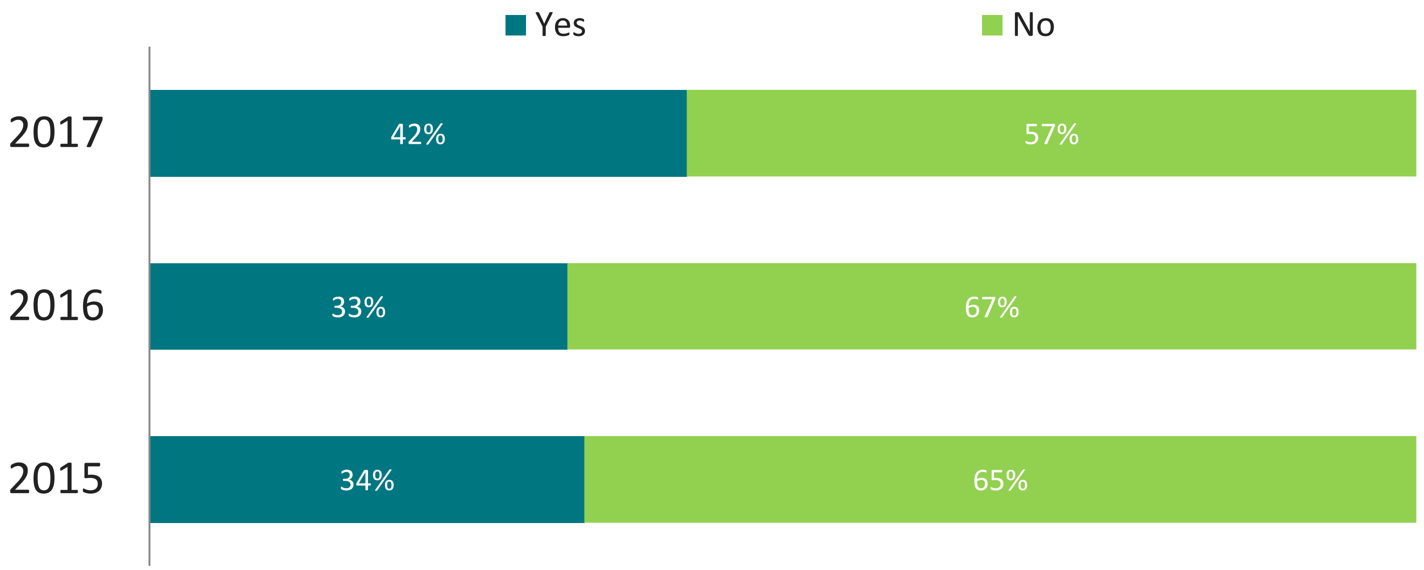
***Note: "None of the above" was not an option in 2013*

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); 2016 (n=500); 2017 (n=500)

EXPERIENCE & SATISFACTION WITH CITY STAFF

CONTACT WITH CITY IN LAST 12 MONTHS

Four-in-ten residents indicate that they had personally contacted the City or dealt with one of the City of London's employees in the last 12 months. This proportion is up significantly by nine points from 2016. The proportion of residents who contacted or dealt with the City within the last 12 months is significantly lower than the National Norm (52%).



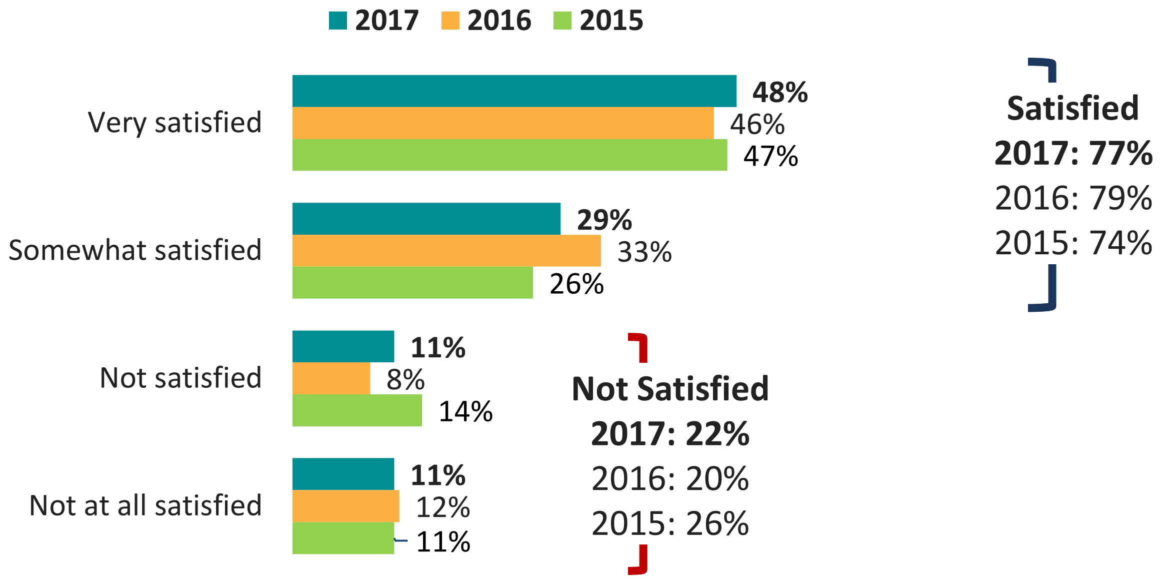
Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Base: All respondents 2015 (n=500); 2016 (n=500); 2017 (n=500)

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, those aged 18 to 34 are significantly more likely than older residents to be very satisfied with their service experience.

Overall satisfaction levels with services received are directionally lower than the National Norm (within the margin of error), but the proportion who are very satisfied is now on par with the National Norm.

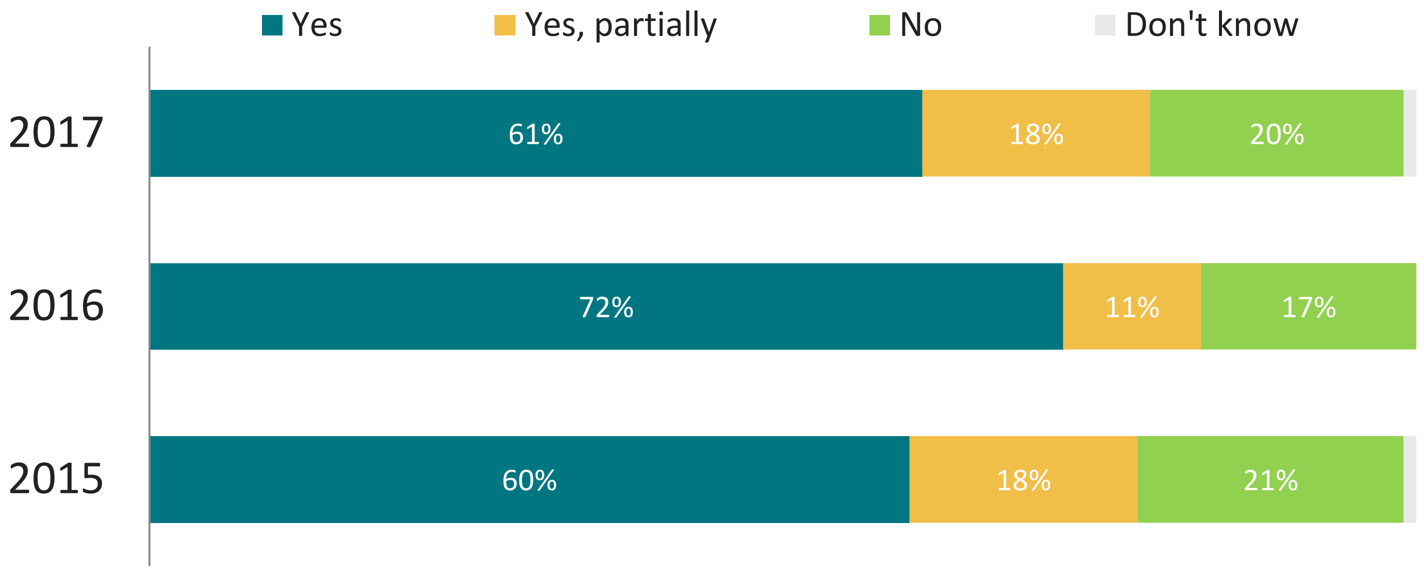


Q9. And thinking of the last time you contacted the City of London, how satisfied were you with the overall service you received? Would you say you were...

Base: Contacted the City of London 2015 (n=172); 2016 (n=166); 2017 (n=196)

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 about two-in-ten say they did not receive the service or support that they required. After increasing significantly in 2016, this figure is down by 11 points and has returned to the level recorded in 2015.

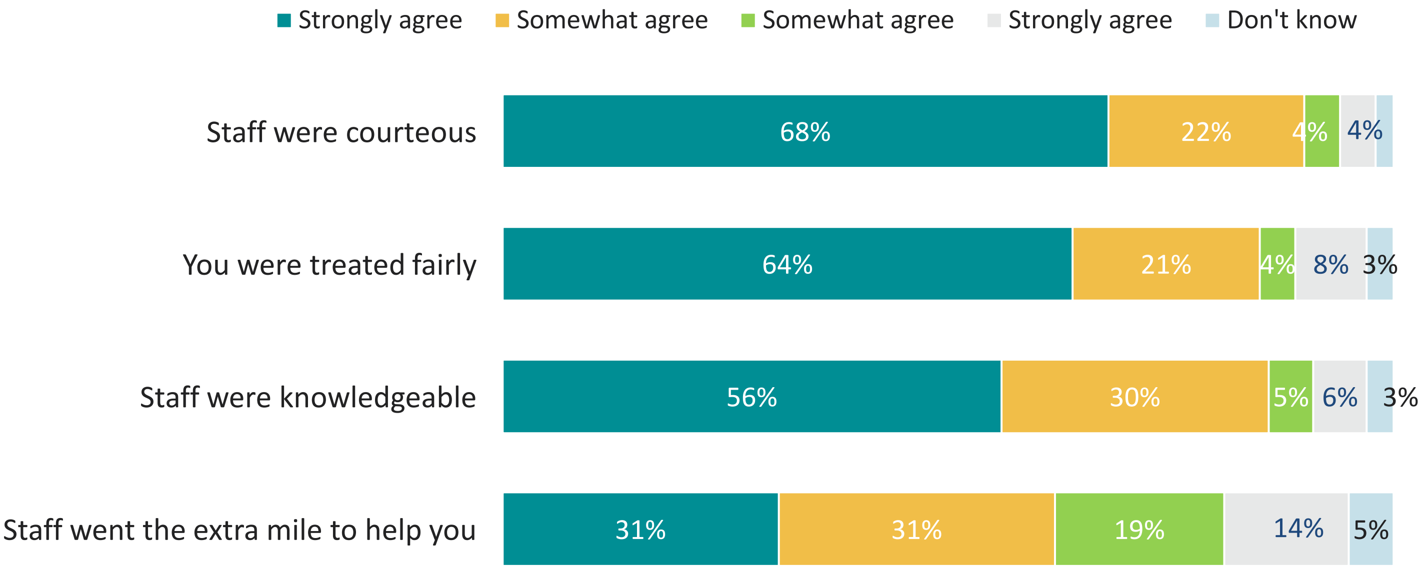


*Please note that ratings less than 3% are not labelled on the graph.

Q10. In the end, did you receive the service or support you needed?
Base: Contacted City of London 2015 (n=172); 2016 (n=166); 2017 (n=196)

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. These figures have not changed significantly over the past two years.



% Strongly/ Somewhat Agree

	2017	2016	2015
Staff were courteous	91%	87%	90%
You were treated fairly	85%	86%	83%
Staff were knowledgeable	86%	84%	86%
Staff went the extra mile to help you	62%	64%	64%

*Please note that ratings less than 3% 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 2015 (n=172); 2016 (n=166); 2017 (n=196)

COMMUNICATIONS

PREFERRED METHOD OF RECEIVING INFORMATION FROM CITY

Regular mail (37%), followed by e-mail (32%) are the most preferred methods for receiving information from the City of London. Mention of telephone is down significantly by three points since 2016.

Residents under the age of 55 are significantly more likely to prefer receiving information via email, while residents 35 and older are more likely to prefer receiving information via a local newspaper. Women are more likely than men to mention local television.

Method	2015	2016	2017
Regular mail	33%	37%	37%
E-mail	27%	30%	32%
City website	8%	7%	6%
Local newspaper	8%	8%	5%
Local television	8%	4%	5%
Telephone	5%	7%	4%
Local radio	3%	2%	1%
In-person at an office or service counter	2%	2%	1%
Other	4%	3%	6%
Don’t know	3%	1%	3%

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); 2017 (n=500)

PREFERRED METHOD OF RECEIVING INFORMATION FROM CITY BY SUBGROUPS

Residents aged 18 to 34 are most likely to prefer to receive information from the City via e-mail, while those aged 35 to 54 are divided between regular mail and e-mail. Those aged 55 and older are most likely to prefer to receive this information via regular mail. Those under the age of 55 are significantly more likely to prefer to receive information from the City via e-mail. Those aged 55 and older are significantly more likely to prefer receiving this information through a local newspaper.

Top 5 mentions	Total	Age		
	Total	18-34	35-54	55+
	A	*B*	*C*	*D*
Sample size =	*500*	*103*	*168*	*229*
Regular mail	37%	32%	37%	41%
E-mail	32%	40%D	35%D	23%
City website	6%	5%	8%	5%
Local newspaper	5%	2%	3%	10%BC
Local television	5%	3%	7%	5%

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

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); 2017 (n=500)

PREFERRED METHOD OF CONTACTING THE CITY OF LONDON

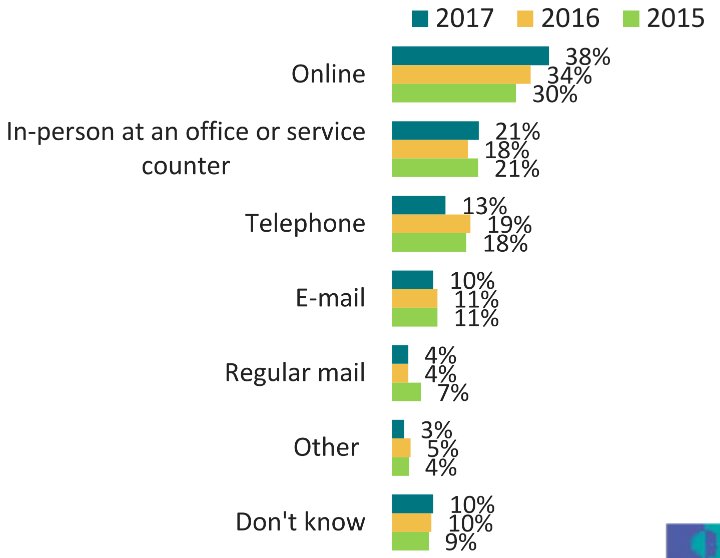
In terms of contacting the City with an inquiry or concern, there is a strong preference from two-thirds of residents to do this over the telephone, while two-in-ten would prefer to do this via e-mail. Since 2016, preference for regular mail is down significantly. Those aged 18 to 34 and 55+ are more likely than those aged 35 to 54 to prefer contacting the City via telephone.

There are mixed preferences for conducting business with the City, but the largest share prefer to conduct business with the City online (38%), followed by in-person (21%). Residents under the age of 55 are more likely to prefer to conduct business with the City online, while those aged 18 to 34 and 55+ are more likely than those aged 35 to 54 to prefer to conduct business with the City via telephone.

Contacting the City with an inquiry or concern

Method	2013	2015	2016	2017
Telephone	49%	68%	67%	66%
E-mail	31%	19%	18%	21%
Online	27%	5%	4%	4%
In-person at an office or service counter	14%	4%	4%	4%
Regular mail	2%	1%	3%	-
Other	-	-	1%	2%
Don’t know	-	2%	2%	2%

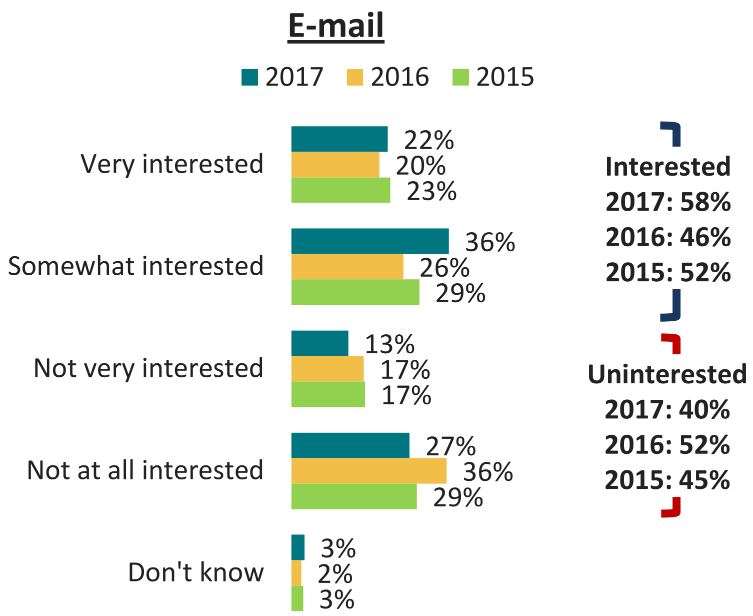
Conducting business (such as bill payments, service registration and permits) with the City

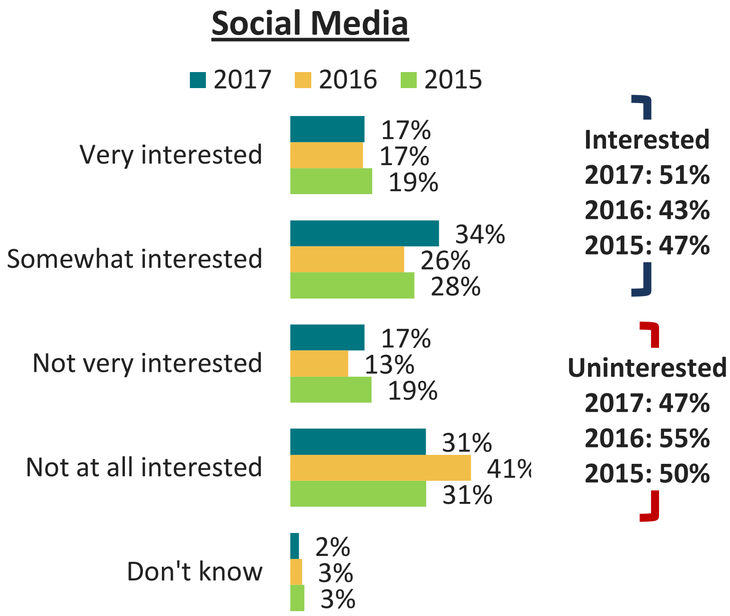


QC2. And, what is your preferred method of [insert]?
Base: All respondents 2013; (n=501); 2015 (n=500); 2016 (n=500); 2017 (n=500)

LEVEL OF INTEREST IN RECEIVING COMMUNITY INFORMATION

Six-in-ten residents are interested in receiving information from the City about their community, including services, programs and events, via e-mail. This proportion is up significantly by 12 points from 2016 and the number who are uninterested is down 12 points.
Half are interested in receiving community information from the City via social media; which is up significantly by eight points from 2015 and the number who are uninterested is down eight points.





 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); 2017 (n=500)

LEVEL OF INTEREST IN RECEIVING COMMUNITY INFORMATION BY SUBGROUPS

Interest in receiving community information via e-mail is significantly higher among residents under the age of 54 than among those aged 55 and older. Interest in receiving this information via social media is significantly higher among those aged 18-34 than among those aged 35 and older.

	Via E-mail			
	Total	**Age**		
	Total	**18-34**	**35-54**	**55+**
	A	*B*	*C*	*D*
Sample size =	*500*	*103*	*168*	*229*
Very/somewhat interested	58%	65% D	59% D	49%

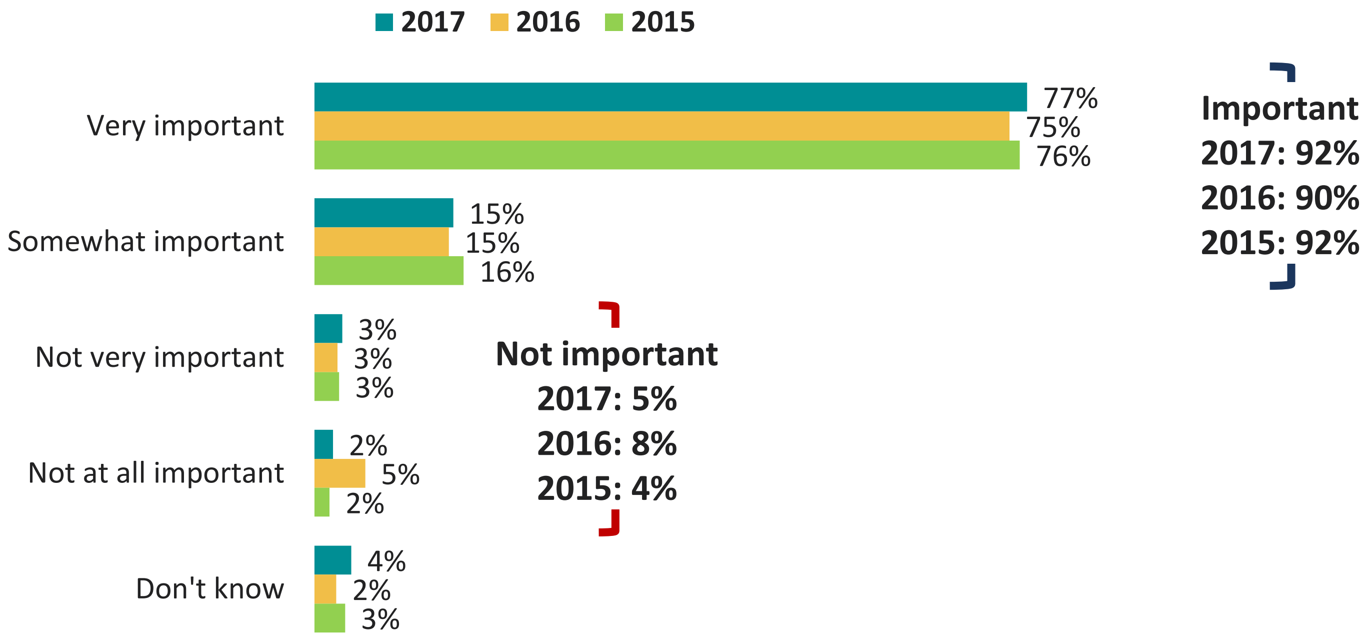
	Via Social Media			
	Total	**Age**		
	Total	**18-34**	**35-54**	**55+**
	A	*B*	*C*	*D*
Sample size =	*500*	*103*	*168*	*229*
Very/somewhat interested	51%	63% D	49%	41%

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

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); 2017 (n=500)

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. This figure is relatively unchanged from 2016.

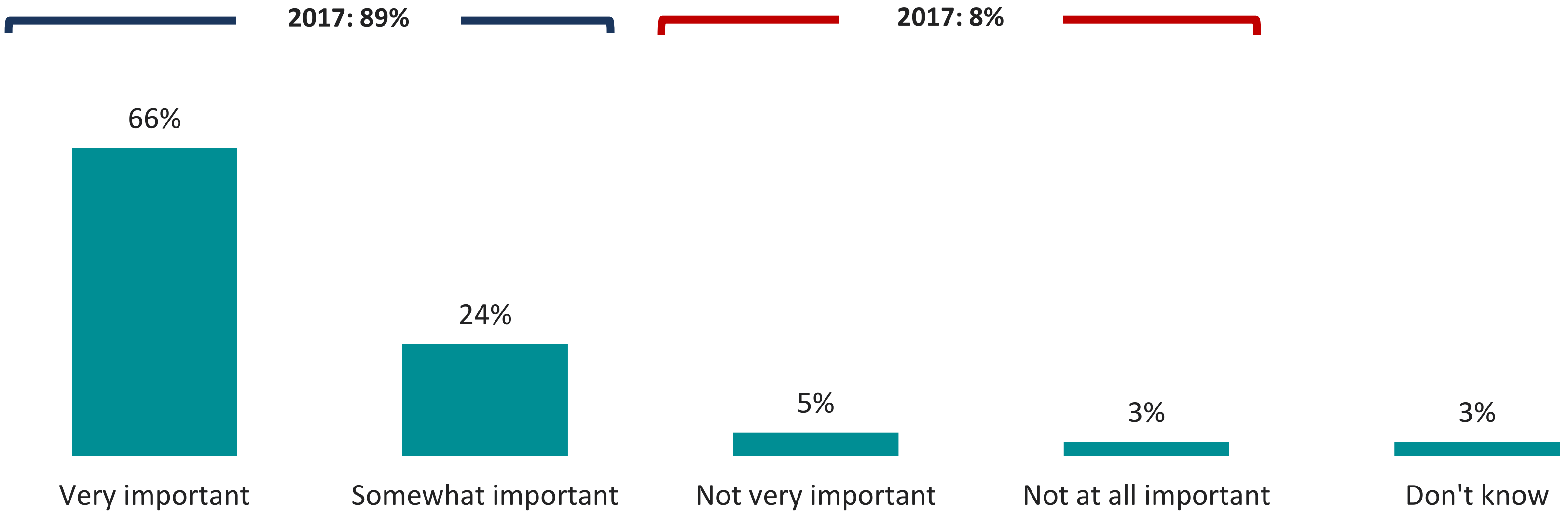


QC4. How important is it that the city follow-up regarding the concerns or complaint you made to the city? Would you say...?
Base: All respondents 2015 (n=500); 2016 (n=500); 2017 (n=500)

CULTURAL EVENTS

IMPORTANCE OF FREE PUBLICLY ACCESSIBLE LIVE MUSIC EVENTS

An overwhelming majority of London residents believe that free publicly accessible live music events, such as festivals in Victoria Park and Canada Day celebrations are important (89%). Moreover, two-thirds view free public access to these events as very important. Only one-in-ten think this is not important. Overwhelming majorities across all demographic groups think these free publicly accessible live music events are important. However, those aged 18 to 54 are significantly more likely than their older counterparts to think this is very important. This view is also significantly higher among those who have three or more children under the age of 18 living in the household.



Q12. Please rate the importance of free publicly accessible live music events such as festivals in Victoria Park and Canada Day Celebrations.
Base: All respondents 2017 (n=500)

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	4%
High school graduate or equivalent	18%
Some/completed trade/technical school	1%
Some/completed community college	30%
Some/completed university	28%
Graduate/professional studies	17%

Annual Household Income Before Taxes	
Less than $25,000	10%
$25,000 to less than $50,000	20%
$50,000 to less than $75,000	16%
$75,000 to less than $100,000	15%
$100,000 to less than $150,000	13%
$150,000 or more	7%

Number of People Living in Home	
One	18%
Two	37%
Three	20%
Four	16%
Five or more	8%

Number of Children Under the Age of 18 in Home	
0	71%
1-2	24%
3 or more	6%

Number of Years Living in London	
Less than 1 year	3%
1 to less than 5 years	9%
5 to less than 10 years	4%
10 to less than 20 years	13%
20 years or more	69%

Own or Operate a Business	
Yes	7%
No	92%
Don't know	1%

Rent or Own Home	
Own	69%
Rent	28%

Contacts

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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.

London CANADA

Demographic Profile -Comparison of IPSOS Survey Respondents with Statistics Canada (2016 Census) (1)

GENDER	IPSOS SURVEY	STATS-CAN CENSUS
Male	47%	48%
Female	53%	52%

AGE	IPSOS SURVEY	STATS-CAN CENSUS
18 - 34	31%	31%
35 - 54	35%	32%
55 and over	34%	37%

Education Level (1)	IPSOS SURVEY	STATS-CAN CENSUS
Less than high School	4%	14%
High School/Equivalent	18%	23%
Trades/ Technical	1%	6%
College	30%	18%
University	28%	14%
Post Graduate Studies	17%	8%

Household Income (1)	IPSOS SURVEY	STATS-CAN CENSUS
< $25,000.00	10%	14%
$25,000.00 to $49,999.00	20%	30%
$50,000.00 to $74,999.00	16%	22%
$75,000.00 to $99,999.00	15%	11%
$100,000 to 149,999.00	13%	14%
> $150,000.00	7%	8%

(Annualized income before taxes)

Number of People Living in Home	IPSOS SURVEY	STATS-CAN CENSUS
One	18%	32%
Two	37%	34%
Three	20%	15%
Four	16%	12%
Five or more	8%	7%
Number of Children <18 Living at Home (1)	**IPSOS SURVEY**	**STATS-CAN CENSUS**
None	71%	39%
1 or 2	24%	51%
3 or more	6%	10%
Number of Years Living in London	**IPSOS SURVEY**	**STATS-CAN CENSUS**
<1 Year	3%	N.A.
1 to 5 Years	9%	N.A.
5 to 10 Years	4%	N.A.
10 to 20 Years	13%	N.A.
> 20 Years	69%	N.A.
Business Owner (1)	**IPSOS SURVEY**	**STATS-CAN CENSUS**
Yes	7%	8%
None	92%	92%
Don't know	1%	N.A.
Rent or Own Home (1)	**IPSOS SURVEY**	**STATS-CAN CENSUS**
Own	69%	63%
Rent	28%	37%

Note: For variables where 2016 Census data have not been made publicly available information from the previous 2011 reporting period was utilized as the best available for comparative purposes - these are specified with notation, see (1) .

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