TO:	CHAIR AND MEMBERS STRATEGIC PLANNING AND PRIORITIES COMMITTEE MEETING OF NOVEMBER 19, 2018
FROM:	MARTIN HAYWARD CITY MANAGER
SUBJECT	2018 ANNUAL COMMUNITY SURVEY

RECOMMENDATION

That, on the recommendation of the City Manager, the following report on the City of London 2018 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
- Item 2, Strategic Priorities & Policy Committee, *2017 Annual Community Survey,* August 21, 2017

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 2018 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

2018 Survey Results

The 2018 Annual Community Survey was conducted by Ipsos Public Affairs between May 23 and June 2, 2018. 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 value for tax dollars, and more.

The survey was conducted by telephone and the sample was drawn using random digit dialing 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 based on the 2016 Census. A detailed demographic profile analysis is included in **Appendix B**.

Most Important Issues in London – Top Mentions

- *Transportation* is mentioned as the most important issue facing the City of London by 35% of respondents, and each year it has been mentioned with increasing importance. Although it was also the most important issue in 2017 (mentioned by 36% of respondents), mentions have increased since 2016 (23%) and 2015 (13%). Mentions of transportation include: inadequate public transit/transportation; rapid transit/support for rapid transit; opposition to rapid transit; traffic/road congestion/traffic lights.
- *Development/infrastructure* is noted as the second most important issue facing Londoners as mentioned by 20% of respondents. This is also a consistent top mention, as noted by 11% of respondents in 2017, 19% in 2016 and 21% in 2015. Mentions of development/infrastructure include: roads/road repair/snow removal/poorly maintained roads; infrastructure; and development – urban sprawl/loss of green space.

Quality of Life

- 92% of Londoners believe that quality of life is *good*, which is lower than the National Norm of 97%. Older adults are more likely to report very good quality of life. *Lots to do* remains the highest factor contributing to the good quality of life, as well as *quality of life/good standard of living/better than other cities* and *safe city/low crime.*

City Services Assessment

- Most residents (90%), remain satisfied with the level of service delivery from the City, including 20% who are very satisfied. Overall satisfaction with City services is on par with the National Norm (92%).
- In particular, residents are most satisfied with *parks and other green spaces, drinking water* and *protection services.*
- Large majorities of residents are satisfied with the quality of service delivery (84%), accessibility of services (81%), and the time it takes to receive services from the City of London (75%). These results have remained steady or have improved since 2017.

Gap Analysis

- The gap analysis shows the difference between how important various City services are to residents and how satisfied they are with the services. Importance scores are derived from a correlation analysis which shows the interrelations among the services and the service's impact on overall service satisfaction. The higher the correlation factor, the higher the impact of the service in driving up overall service satisfaction.
- The gap analysis chart identifies areas for improvement and maintenance and is used for illustrative purposes to indicate the relative placement of the various services to other services, and not as a statistical placement of data.
- Primary areas for improvement are economic development, snow clearing and removal, building permits, revitalization of older neighbourhoods and main streets, city expansion/ protection of farmland, social services, parking, roads.

- Primary areas for maintenance are recreation, sports and leisure programs; protective services such as fire, police and ambulance; sewers/wastewater treatment; animal services; public health; environmental programs and by-law enforcement.

Value for Tax Dollar

- Most residents (79%) have a good perception of value for tax dollars, including 18% who believe they receive very good value. This represents an increase from 2017 and is on par with the National Norm.

Contact and Communications

- 38% of residents indicate that they have contacted the City over the past 12 months, and of these, 78% are satisfied with the service that they received. More residents report that staff were courteous, treated them fairly, were knowledgeable and went the extra mile to help, and these figures are consistent over the past three years.

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 Annual Community Survey is also a key component of Council's 2015-2019 Strategic Plan and our commitment to be an "Open, accountable and transparent government" in the service of Londoners.

PREPARED BY:	**REVIEWED AND SUBMITTED BY:**
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RECOMMENDED BY:
MARTIN HAYWARD **CITY MANAGER**

c. Strategic Management Team
Operations Management Team

APPENDIX "A"

Ipsos Public Affairs

City of London

2018 Citizen Satisfaction Survey

September 12, 2018

APPENDIX "A"

CONTENTS

APPENDIX "A"

OBJECTIVES

- Ipsos is pleased to present the City of London with the results of the 2018 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.

APPENDIX "A"

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 based on the 2016 Census.
- 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, 2018.
- 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, 2017, and 2018 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 remains the top issue of focus for residents.

Mentions of transportation as the issue that should receive the greatest attention from the City are stable and almost four times higher than recorded five years ago (35%, up from 25 points from 2013). Most of the focus (20%) is on inadequate public transit, and there fewer mention rapid transit (1% down from 10% in 2017). In a distant second place is development and infrastructure (20%, up from 9 points from 2017) (see p.11).

Overall quality of life scores are lower than National Norm.

An overwhelming majority (92%) of residents continue to believe the quality of life in the City of London is good, but this figure is lower than the National Norm), including one-third (31%) who say "very good." However, this drop is driven by a significant decline in those who say "good," while the proportion who say "very good" has not changed significantly. (see p.13)

Overall satisfaction with the level of City service is on par with National Norm, but strong satisfaction down over past two years.

A vast majority (90%) remain satisfied with the overall level of City services, including 20% who are very satisfied. However, the latter figure is down 10 points over the past two years and remains significantly below the National Norm. Most residents continue to be somewhat satisfied (71%), and this figure is up significantly from 2017 (from 62% to 71%). (see p.17)

Perceptions of timeliness of service, which declined in 2017, are up directionally in the current survey.

Large majorities of residents continue to be satisfied with the quality, accessibility and the time it takes to receive service from the City, and perceptions of timeliness, which dropped significantly last year are up directionally (within the margin of error). (see p.19)

KEY FINDINGS (2)

Satisfaction is up in a number of areas, particularly by-law enforcement and animal services, and down on social/affordable housing.

Satisfaction with most individual services is similar to 2017, but there have been significant increases in satisfaction with leaf and yard waste green week collection (see p.20), public health, stormwater management, animal services, and by-law enforcement (see p. 21), and a significant decline in the area of social/affordable housing. (see p.22)

Economic development, snow clearing and removal, parking, social services, roads, City expansion/protection of farmland, building permits, and revitalization of older neighbourhoods and main streets are strongest drivers of overall satisfaction.

The gap analysis (see pp. 24-26) indicates that the City should focus on economic development, snow clearing and removal, parking, social services, roads, City expansion/protection of farmland, building permits, and revitalization of older neighbourhoods and main streets, as boosting scores in these areas would have the greatest impact on satisfaction with overall level of service.

A large majority continues to perceive that they are getting good value for tax dollars, and this figure is up directionally from 2017, and now on par with the National Norm.

The 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 (18%) who say they receive very good value. Moreover, both these figures are up directionally from 2017, and now on par with the National Norm (82% and 20%, respectively) (see p.28).

KEY FINDINGS (3)

On balance, residents continue to prefer increased taxes over cutting services, but there is a significant drop in support for tax increases.

When presented with options, residents prefer increasing taxes in order to maintain or expand services (43%) compared to the preference for cutting services (35%), but there is a significant drop in preference for tax increases. There is some preference for increasing taxes just to maintain services (26%) rather than increasing taxes to enhance or expand services (18%). There is a clear preference for cutting services to maintain tax levels (23%) rather than residents who would cut services to reduce tax levels (12%). Two in ten residents have difficulty in choosing between these options and chose none of the above (up from 11% to 16%) or don't know. (see p.29)

Contact with the City remains relatively stable, 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. (see p.31) Among these, a large majority are satisfied (78%), including 49% who are very satisfied (see p.32). These figures are below the National Norm. The proportion who had contacted the City who report receiving the service or support they needed (62%,) is on par with last year. (see p.33)

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 (33%), followed by e-mail (31%) are the most preferred methods for receiving information from the City (see p.36). There is a strong preference for using the telephone to contact the City with an inquiry or concern (61%), but less of a consensus when it comes to conducting business with the City (42% online, 18% in-person). (see p.37)

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

Nine in ten respondents believe it is important for the City to follow up with residents regarding concerns or complaints, including 73% who see this as very important. (see p.39)

DETAILED FINDINGS

MOST IMPORTANT ISSUES: TOP MENTIONS

APPENDIX "A"

MOST IMPORTANT ISSUES IN LONDON – TOP MENTIONS

Transportation remains the highest ranking issue on the public agenda, with almost four in ten continuing to say it is the most important issue facing the City, including almost two in ten, who specifically mention inadequate public transit/ transportation. Although overall focus on this issue is unchanged from 2016, there has been a decline in support for a rapid transit system (from 10% to 1%). At a distant second place is development/infrastructure mentioned by two in ten, but this issue is up from 2016 (from 11% to 20%), driven by an increase in roads or road repair (from 5% to 11%). Compared to the national norm, London residents continue to be less likely to prioritize economics (4% vs 8%) or taxes (3% vs 8%), as an important issue.

	2018	2017	2016	2015	2013	Norm
NET: Transportation	35%	36%	23%	13%	10%	31%
Inadequate public transit/transportation	20%	17%	17%	10%	4%	-
Rapid transit/ support for rapid transit	1%	10%	-	-	-	-
Opposition to rapid transit	7%	4%	-	-	-	-
Traffic/road congestion/traffic lights	7%	4%	5%	4%	6%	-
NET: Development/infrastructure	20%	11%	19%	21%	6%	10%
Roads/Road repair/snow removal/poorly maintained roads	11%	5%	9%	11%	3%	-
Infrastructure	3%	3%	8%	7%	3%	-
Development - urban sprawl/loss of greenspace	3%	2%	2%	3%	1%	-
NET: Poverty	4%	5%	5%	3%	1%	-
Homelessness	3%	4%	3%	2%	-	-
Poverty	1%	2%	3%	1%	1%	-

	2018	2017	2016	2015	2013	Norm
NET: Economics	4%	4%	13%	13%	38%	9%
Unemployment/ Jobs/ poor job market	4%	3%	12%	12%	37%	-
NET: Mayor/city gov't	4%	4%	4%	4%	22%	-
Fiscal management/gov't spending/budget	2%	-	-	-	-	-
Poor gov't/political infighting/no leadership/vision	1%	2%	-	-	-	-
Hospital wait times/lack of medical care	4%	-	-	-	-	-
Housing - lack of affordable housing	3%	4%	2%	2%	-	-
Taxes	3%	3%	5%	6%	4%	11%
Drug addiction/use/rehab	2%	2%	1%	-	-	-
Economic growth/attract, retain businesses/manufacturing	2%	-	-	-	-	-
Nothing	5%	5%	4%	2%	2%	-
Don't know / Refused	8%	12%	10%	13%	5%	-

†Totals for this question do not add up to 100% as other mentions less than 2% are not shown in the table. The only time mentions of less than 2% are shown is for tracking purposes.

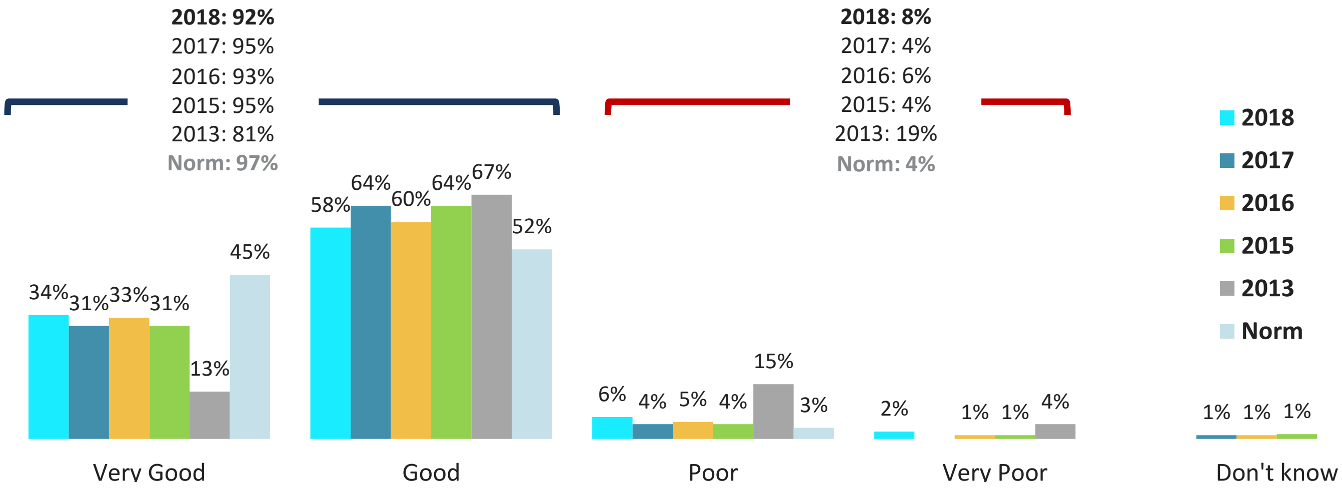
Q1. To begin, in your view, what are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? Base: All respondents 2013 (n=501); 2015 (n=500); 2016 (500) ; 2017 (500); 2018 (n=500)

QUALITY OF LIFE

APPENDIX "A"

OVERALL QUALITY OF LIFE

An overwhelming majority of London residents believe that the quality of life in London is good (92%). Among these, six in ten believe the quality of life is good compared to 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 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 significantly lower than the National Norm (96%), and, the city continues to score significantly lower than the National Norm in the proportion who rate it as very good (34% vs. 45%, respectively).



†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); 2018 (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 with a university education and those with household incomes of $50K and above.

Overall Quality of Life

	Total	Education				Household Income		
	Total	H.S. or less	Some/Comp Trade/College	Some/Comp/ University	Graduate/ Prof Studies	<than $50K	$50K to <$100K	$100K or More
	A	*B*	*C*	*D*	*E*	*F*	*G*	*H*
Good (Top 2 Score)	92%	95%	91%	94%	86%	86%	95% F	96% F
Very good	34%	28%	23%	41% BC	53% BC	25%	41% F	41% F
Good	58%	67% DE	68% DE	53% E	33%	61%	54%	55%
Poor	6%	5%	4%	6%	12%	13% GH	2%	4%
Very poor	2%	-	5%	-	-	1%	3%	-

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

†Totals for this question do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%. Also, in this case the don't know response is not shown..

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 (92% or n=467) perceive the quality of life in the city as good. The main reasons provided are because there is lots to do, quality of life, because it is a safe city, nature trails/parks, and having a good income/having a job. Since 2017, more residents mention quality of life, nature trails/parks, while fewer mention good/friendly city, beautiful environment, and quiet/peaceful. A small number of residents (n=30) think the quality of life is poor, with the most common reasons being poor quality of life, poverty/homelessness, money not being spent wisely, unemployment and higher taxes than other cities.

Why Quality of Life is Good

	2018	2017	2016	2015
Lots to do (Events, activities, amenities, culture, entertainment, etc.)	17%	13%	20%	17%
Quality of life/ Good standard of living/ Better than other cities	17%	5%	10%	10%
Safe city/ Low crime	15%	13%	17%	16%
Nature trails/ Parks	11%	5%	10%	7%
Good income/Have a job here	11%	9%	8%	6%
Healthcare	9%	6%	8%	5%
Right size/ Not too big	9%	11%	10%	12%
Good schools	8%	7%	5%	6%
Good services (police/fire)/ Social programs	7%	6%	9%	8%
Convenience - Everything you need is here	7%	8%	8%	10%
Affordable living	7%	4%	5%	11%
Good/Friendly/Nice City	7%	13%	18%	20%
Environment - Clean, green, beautiful	6%	11%	10%	12%
Quiet/peaceful	6%	1%	6%	3%
Pleasant neighbourhood(s)	5%	2%	5%	3%
Easy to get around (not overcrowded	5%	4%	5%	3%
Good housing market	5%	3%	5%	-

†Totals in the above table do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

*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=467); Overall quality of life poor/ very poor (n=30*)

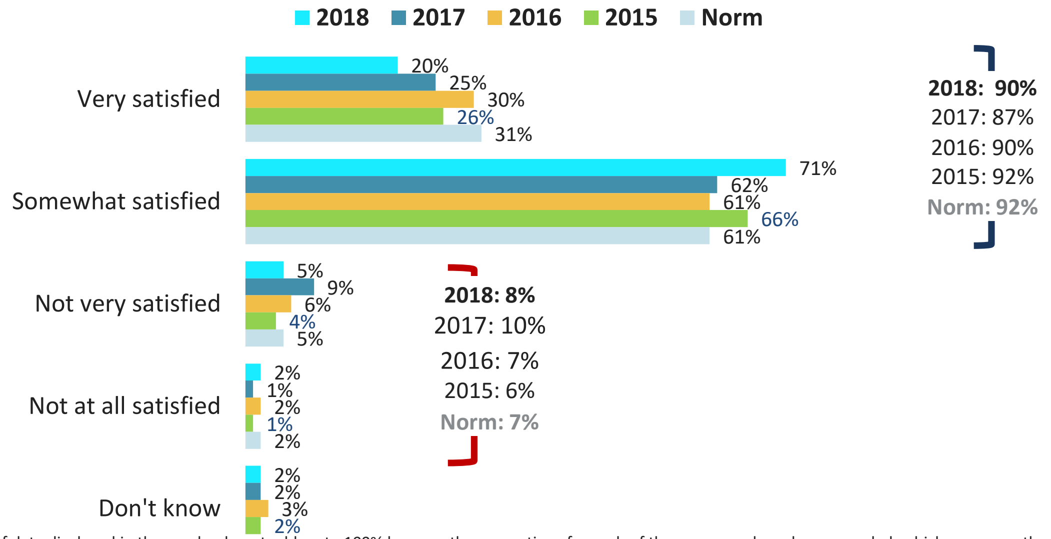
*Small sample size

CITY SERVICES ASSESSMENT

APPENDIX "A"

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 (71%), and two in ten being very satisfied. However, the proportion who are very satisfied has shown a downward trend over the past two years, and is now down significantly by 10 points from 2016. But this decline does not correspond to an increase in dissatisfaction but rather to an increase in those who are only “somewhat satisfied,” (from 62% to 71%). Overall satisfaction with City services is on par with the Canadian National Norm, but the proportion who are very satisfied remains significantly lower.



†Totals for some of the years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); (n=500)

APPENDIX "A"

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

Residents aged 55+ are significantly more likely than younger residents to say they are very satisfied with the overall level of City services.

Overall Satisfaction with City Services

	Total	Age		
	Total *A*	**18-34** *B*	**35-54** *C*	**55+** *D*
Good (Top 2 Score)	90%	91%	91%	89%
Very satisfied	20%	14%	17%	27% BC
Somewhat satisfied	71%	77% D	74% D	62%
Not very satisfied	5%	6%	5%	5%
Not at all satisfied	2%	1%	2%	3%

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

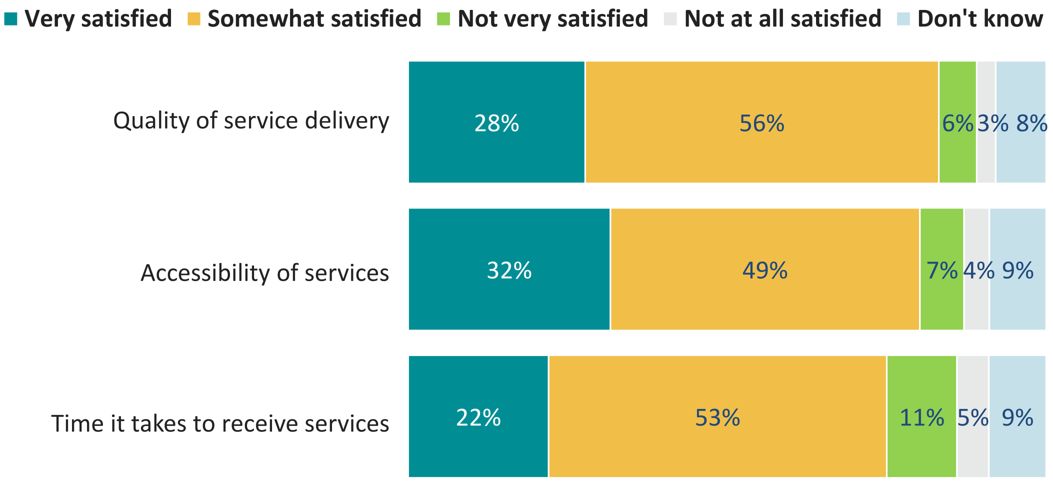
†Totals for this question do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%. Also, in this case the don't know response is not shown..

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)

APPENDIX "A"

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 up directionally from 2017.
Those who have lived in London less than 20 years are more likely than those who have lived in the city 20 years or more to be very satisfied with accessibility of services (40% vs. 28%).



% Very/Somewhat Satisfied	**2018**	2017	2016	2015
Quality of service delivery	**84%**	84%	84%	87%
Accessibility of services	**81%**	80%	83%	85%
Time it takes to receive services	**75%**	71%	79%	79%

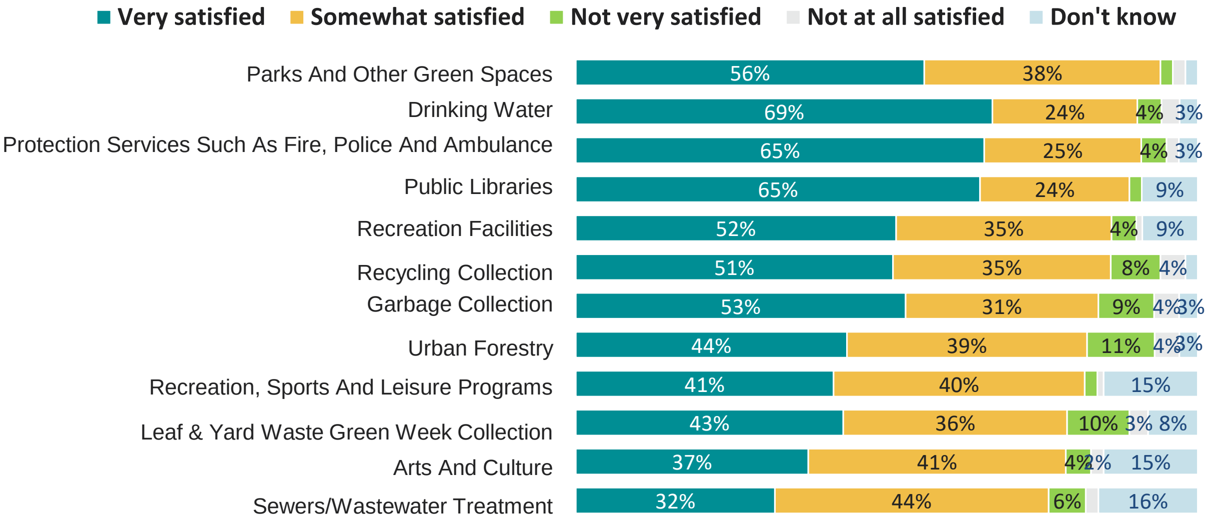
†Totals for some of the years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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)

*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 24 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, garbage collection, recreation facilities, and recycling collection. Satisfaction with Leaf & Yard Waste Green Week Collection is up significantly, after falling significantly in 2017, but is not back to the high level found in 2016.



% Very/Somewhat Satisfied

	2018	2017	2016	2015
Parks And Other Green Spaces	**95%**	92%	92%	93%
Drinking Water	**93%**	92%	91%	92%
Protection Services Such As Fire, Police And Ambulance	**91%**	92%	93%	89%
Public Libraries	**88%**	87%	87%	88%
Recreation Facilities	**87%**	88%	88%	86%
Recycling Collection	**86%**	84%	88%	89%
Garbage Collection	**84%**	84%	86%	86%
Urban Forestry	**83%**	81%	81%	78%
Recreation, Sports And Leisure Programs	**81%**	83%	81%	81%
Leaf & Yard Waste Green Week Collection	**79%**	73%	84%	80%
Arts And Culture	**78%**	76%	75%	77%
Sewers/Wastewater Treatment	**76%**	74%	77%	73%

†Totals for some of the years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

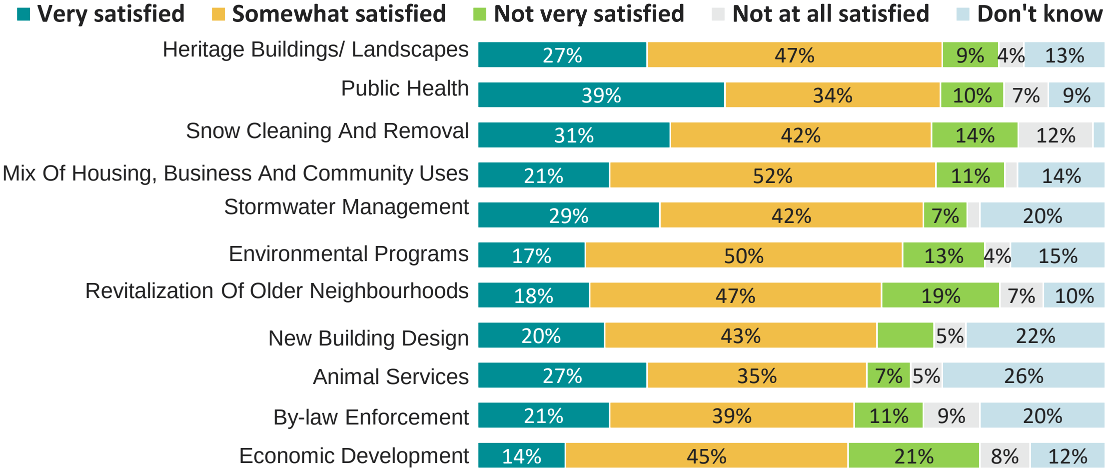
Q5. Now, please rate how satisfied you are with the services provided by the City of London, using a scale of very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.
Base: All Respondents 2015 (n=500); 2016 (n=500);2017 (n=500)

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

APPENDIX "A"

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

Four in ten respondents are very satisfied with public health, and about three in ten are very satisfied with snow cleaning and removal, stormwater management and animal services. One-quarter of respondents are very satisfied with heritage buildings or landscapes. About two in ten respondents are very satisfied with the mix of housing, business and community uses, by-law enforcement, revitalization of older neighbourhoods, and environmental programs. More than one in ten respondents are very satisfied with economic development. However, one-quarter of respondents didn't know how to rate the satisfaction of animal services.
Since 2017, there have been significant increases in the numbers who are satisfied with public health, stormwater management, animal services, and by-law enforcement.



% Very/Somewhat Satisfied

Service	**2018**	2017	2016	2015
Heritage Buildings/ Landscapes	**74%**	74%	77%	73%
Public Health	**73%**	66%	68%	66%
Snow Cleaning And Removal	**73%**	73%	73%	76%
Mix Of Housing, Business And Community Uses	**73%**	-	-	-
Stormwater Management	**71%**	65%	70%	65%
Environmental Programs	**67%**	68%	73%	71%
Revitalization Of Older Neighbourhoods	**65%**	-	-	-
New Building Design	**64%**	-	-	-
Animal Services	**63%**	52%	51%	52%
By-law Enforcement	**60%**	47%	50%	60%
Economic Development	**60%**	56%	58%	N/A

†Totals for some of the years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

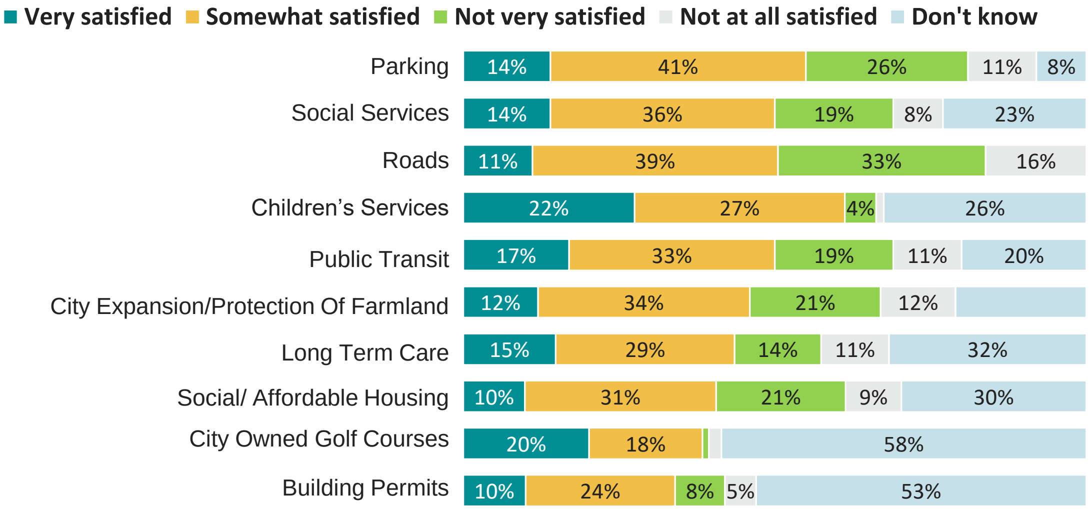
Q5. Now, please rate how satisfied you are with the services provided by the City of London, using a scale of very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.
Base: All Respondents 2015 (n=500); 2016 (n=500); 2017 (n=500)

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

APPENDIX "A"

SATISFACTION WITH INDIVIDUAL SERVICES (End of list)

About two in ten respondents are very satisfied with children's services, City-owned golf courses and public transit. More than one in ten respondents are very satisfied with long term care, parking, social services, and about one in ten are very satisfied with City expansion/protection of farmland, roads, social/affordable housing, and building permits. More than a half of respondents didn't know how to rate City-owned golf courses and building permits, and three in ten are not able to assess long term care and social/affordable housing. Since 2017, there has been a significant drop in the number who are satisfied with social/affordable housing.



% Very/Somewhat Satisfied	2018	2017	2016	2015
Parking	**55%**	61%	64%	78%
Social Services	**50%**	56%	60%	58%
Roads	**50%**	50%	57%	N/A
Children's Services	**49%**	52%	56%	60%
Public Transit	**49%**	47%	51%	48%
City Expansion/Protection Of Farmland	**46%**	-	-	-
Long Term Care	**43%**	48%	54%	50%
Social/ Affordable Housing	**41%**	51%	58%	N/A
City Owned Golf Courses	**39%**	42%	47%	46%
Building Permits	**34%**	33%	41%	39%

†Totals for some of the years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); 2018 (n=500)

*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 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.

APPENDIX "A"

UNDERSTANDING THE GAP ANALYSIS

Primary areas for improvement are:

• Economic Development	• Building Permits	• City Expansion / Protection of Farmland	• Parking
• Snow Clearing and Removal	• Revitalization of Older Neighbourhoods and Main Streets	• Social services	• Roads

Economic development, snow clearing and removal, building permits, revitalization of older neighbourhoods and main streets, City expansion / protection of farmland, social services, parking 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.

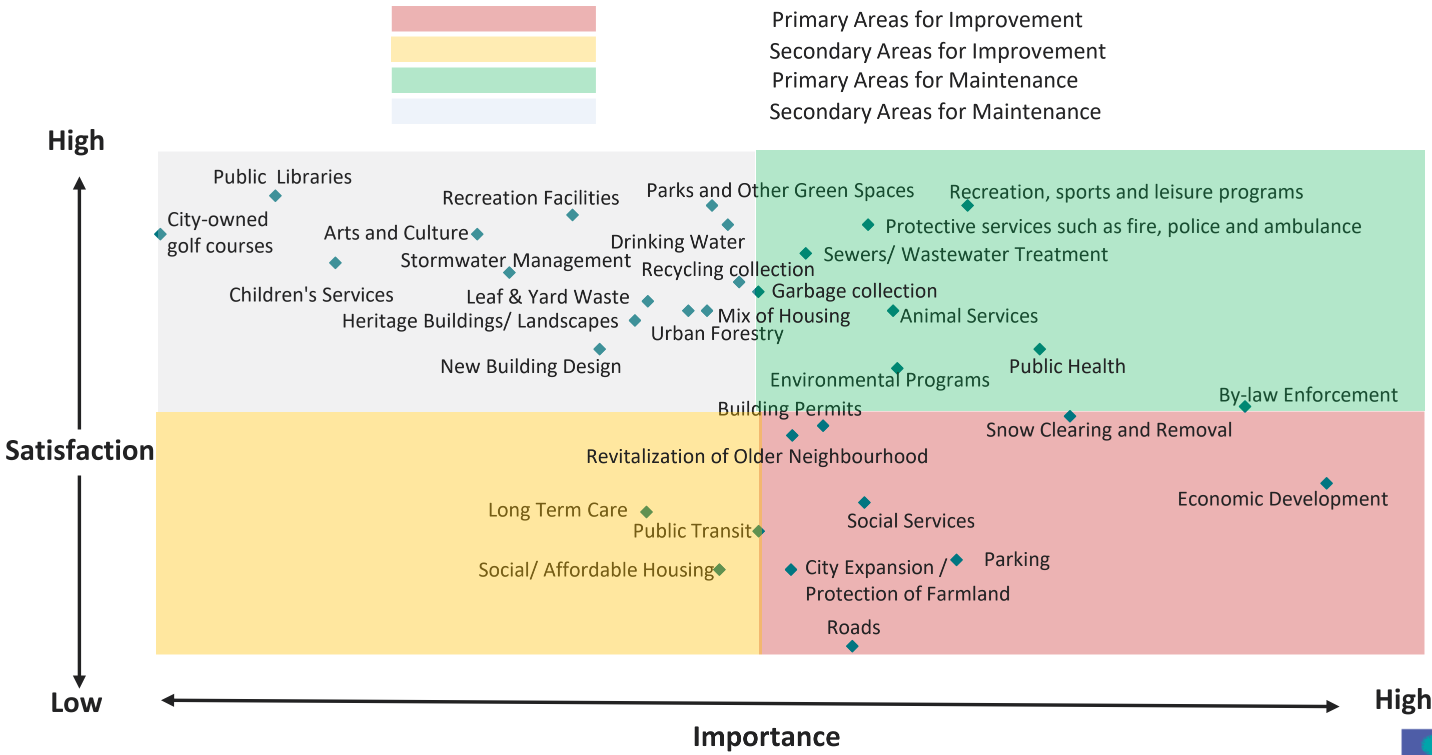
Secondary areas for improvement are:

• Long Term Care	• Social/ Affordable Housing	• Public transit

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

APPENDIX "A"

GAP ANALYSIS

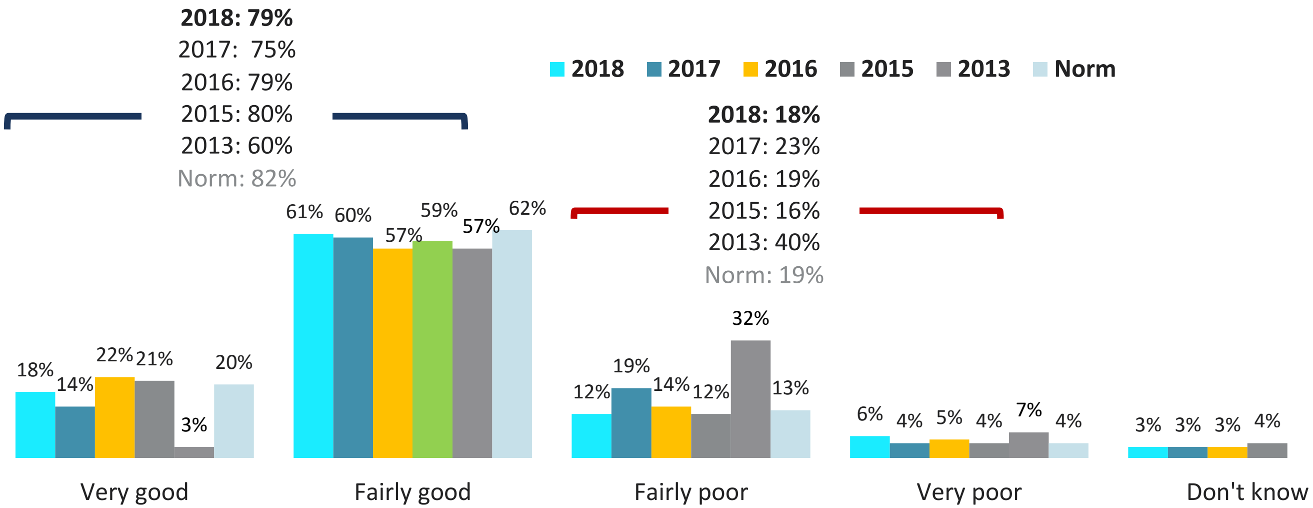


Please note that for the gap analysis, the 'don't know' responses have been removed

VALUE FOR TAX DOLLARS

VALUE FOR TAX DOLLARS

Eight in ten 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 two in ten who believe it is very good. Since 2017, there has been a directional increase in those who say they receive good value for their tax dollar and all of this comes among those who say it is "very good." Those who believe that they get good value for their tax dollars, including those who say "very good" is on par with the Canadian National Norm.



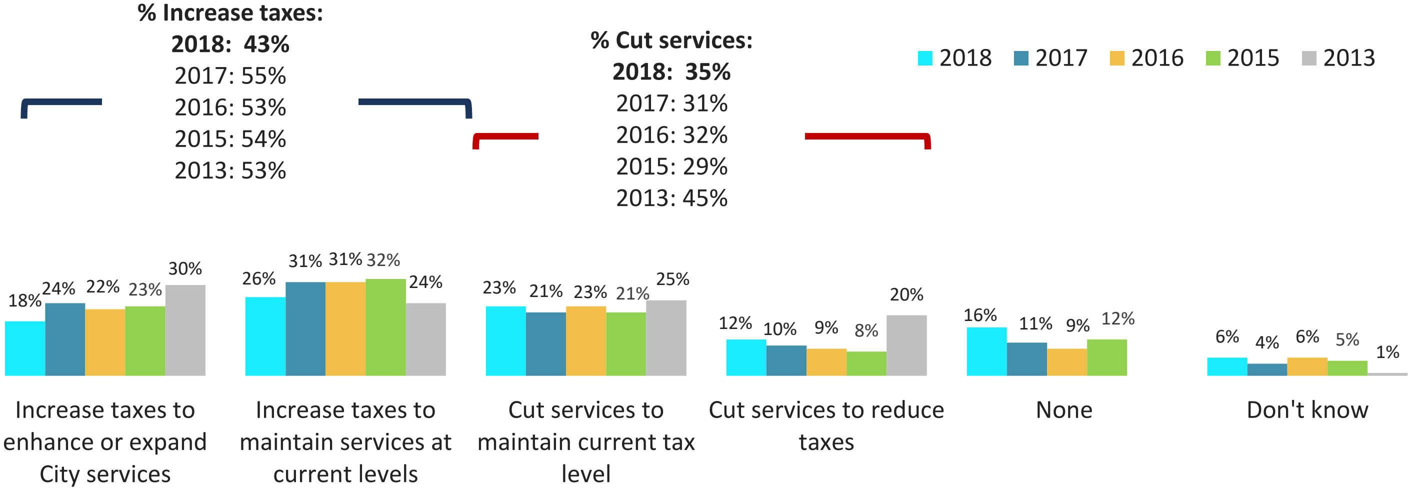
†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); 2018 (n=500)

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

BALANCE OF TAXATION AND SERVICES

In balancing taxation and service delivery levels, residents would rather the City of London increase taxes (43%) rather than cut services (35%). In terms of increasing taxes, there is some preference for increasing taxes to maintain services at current levels (26%) compared to increasing them to enhance or expand services (18%). There is a clear preference for cutting services to maintain the current tax level (23%) over cutting them to reduce taxes (12%). Two in ten respondents do not choose any of these options or offer no opinion. Since 2017, there has been a significant decline in the figure who prefer increasing taxes, and a significant increase in the proportion who choose none of these options.



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

†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

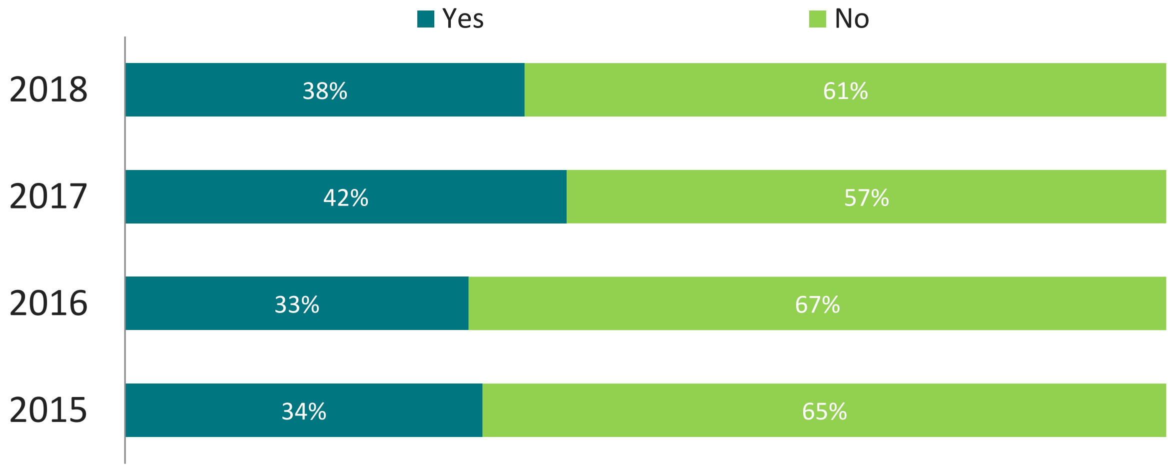
Q7. Municipal property taxes are the primary way to pay for services provided by the City of London. To help the City of London balance taxation and service delivery levels, which of the following four options would you most like the City to pursue?
Base: All respondents 2013 (n=501); 2015 (n=500); 2016 (n=500); 2017 (n=500); 2018 (N=500)

EXPERIENCE & SATISFACTION WITH CITY STAFF

APPENDIX "A"

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 consistent with the figure recorded in 2017. The proportion of residents who contacted or dealt with the City within the last 12 months is significantly lower than the National Norm (51%).



**Mentions less than 2% not shown*

†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

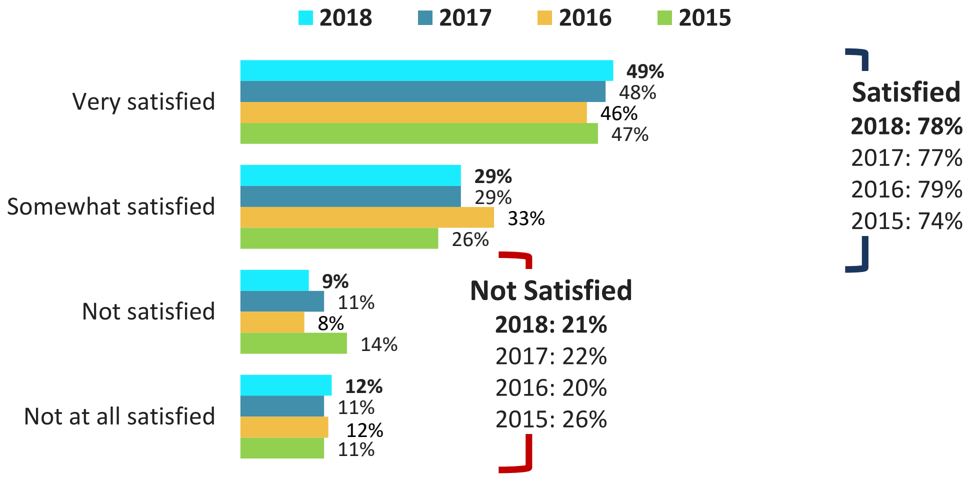
Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Base: All respondents 2015 (n=500); 2016 (n=500); 2017 (n=500); 2018 (n=500)

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 significantly higher than the National Norm (49% vs. 55%, respectively).



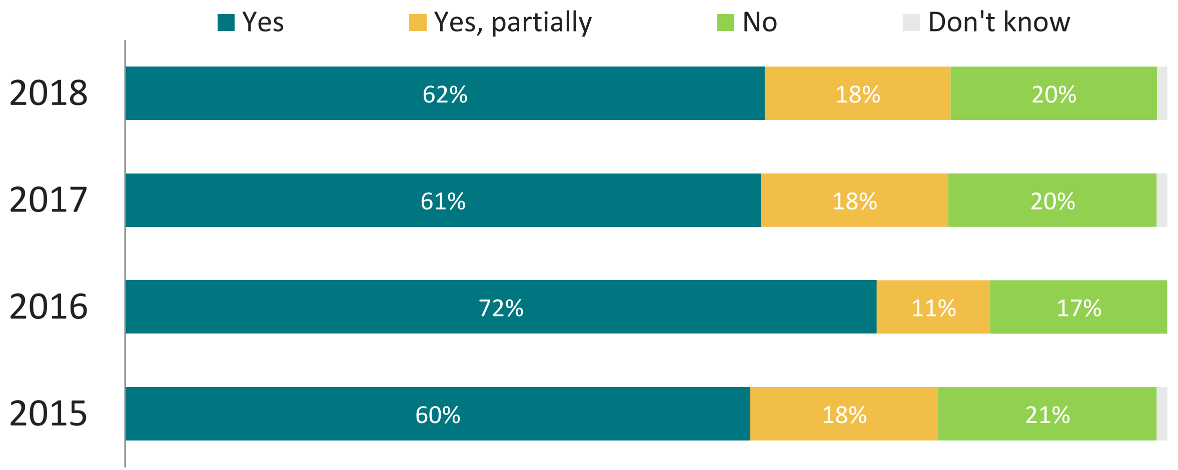
†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); 2018 (n=192)

APPENDIX "A"

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 two in ten say they did not receive the service or support that they required. After falling significantly in 2017, the proportion who say they received all of the service has remained stable.



†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

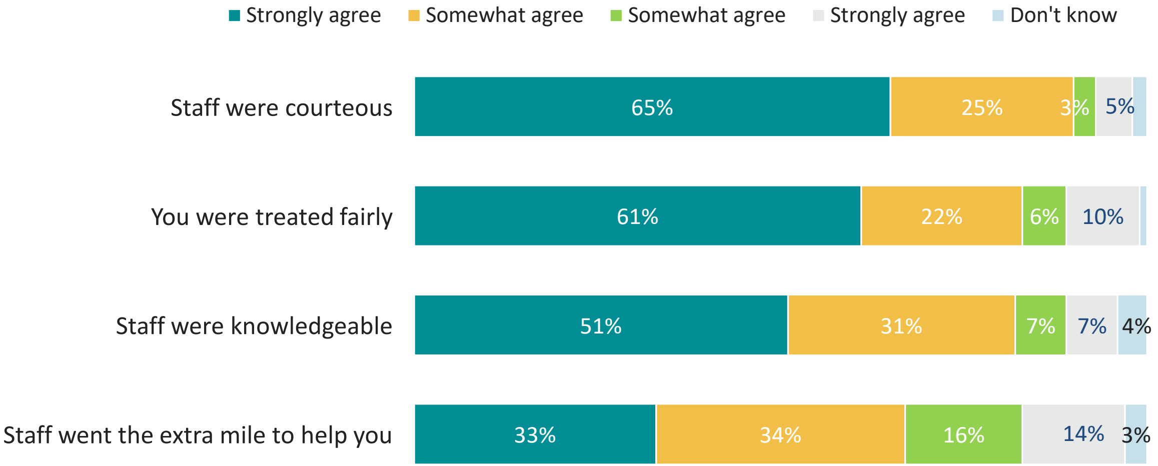
*Please note that ratings less than 3% are not labelled on the graph.

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); 2018 (n=192)

APPENDIX "A"

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 two-thirds 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 three years.



% Strongly/ Somewhat Agree

	2018	2017	2016	2015
Staff were courteous	**90%**	91%	87%	90%
You were treated fairly	**83%**	85%	86%	83%
Staff were knowledgeable	**82%**	86%	84%	86%
Staff went the extra mile to help you	**67%**	62%	64%	64%

†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

*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); 2018 (n=192)

COMMUNICATIONS

PREFERRED METHOD OF RECEIVING INFORMATION FROM CITY

Regular mail (33%), followed by e-mail (31%) remain the most preferred methods for receiving information from the City of London. 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 regular mail. Women are more likely than men to mention local television.

Method	2015	2016	2017	2018
Regular mail	33%	37%	37%	**33%**
E-mail	27%	30%	32%	**31%**
Telephone	5%	7%	4%	**6%**
City website	8%	7%	6%	**5%**
Local newspaper	8%	8%	5%	**5%**
Local television	8%	4%	5%	**5%**
Local radio	3%	2%	1%	**2%**
In-person at an office or service counter	2%	2%	1%	**2%**
Other	4%	3%	6%	**10%**
Don’t know	3%	1%	3%	**2%**

†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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); 2018 (n=500)

APPENDIX "A"

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 six in ten residents to do this over the telephone, while two in ten would prefer to do this via e-mail. Since 2017, preference for telephone is down directionally. Those aged 35 and older are more likely than those aged 18 to 34 to prefer contacting the City via telephone, while those aged 18 to 34 are more likely than their older counterparts to prefer e-mail.

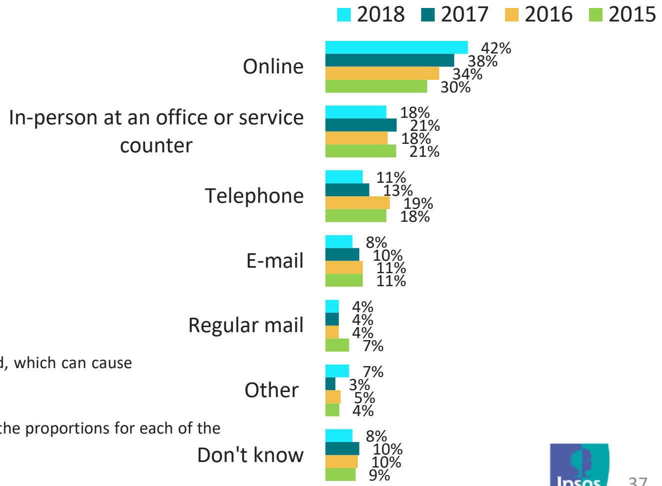
There are mixed preferences for conducting business with the City, but the largest share continue to prefer to conduct business with the City online (42%), followed by in-person (18%). Residents under the age of 55 are more likely to prefer to conduct business with the City online.

Contacting the City with an inquiry or concern

Method	2013	2015	2016	2017	2018
Telephone	49%	68%	67%	66%	**61%**
E-mail	31%	19%	18%	21%	**21%**
Online	27%	5%	4%	4%	**7%**
In-person at an office or service counter	14%	4%	4%	4%	**4%**
Regular mail	2%	1%	3%	-	**1%**
Other	-	-	1%	2%	**5%**
Don’t know	-	2%	2%	2%	**2%**

†Totals in the table above do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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



†Totals for some years of data displayed in the graph on the right-hand side do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

QC2. And, what is your preferred method of [insert]?
Base: All respondents 2013; (n=501); 2015 (n=500); 2016 (n=500); 2017 (n=500) ; 2018 (n=500)

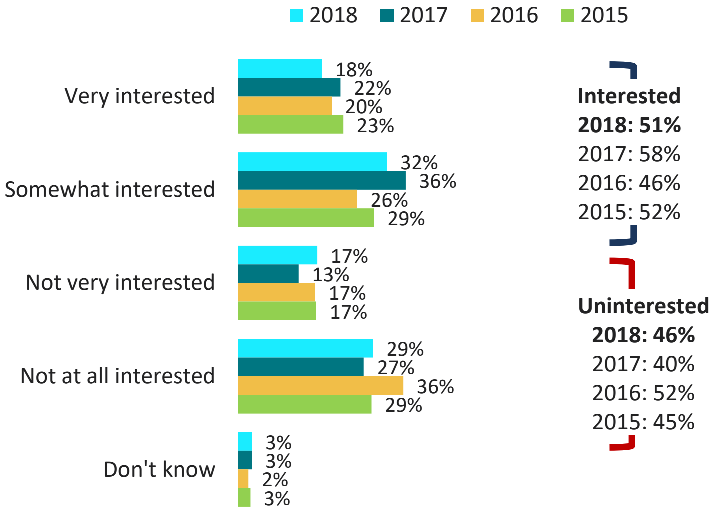
APPENDIX "A"

LEVEL OF INTEREST IN RECEIVING COMMUNITY INFORMATION

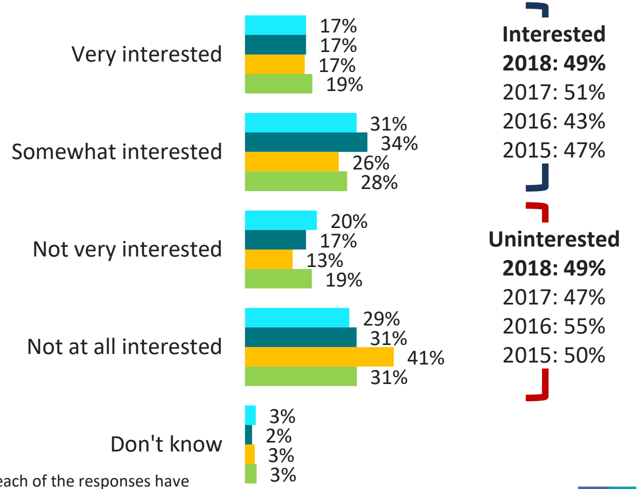
Half of residents are interested in receiving information from the City about their community, including services, programs and events, via e-mail. After increasing significantly between 2016 and 2017, this figure is down significantly by seven points but is still higher than the low point recorded in 2016.

Half remain interested in receiving community information from the City via social media; this figure is on par with 2017.

E-mail



Social Media



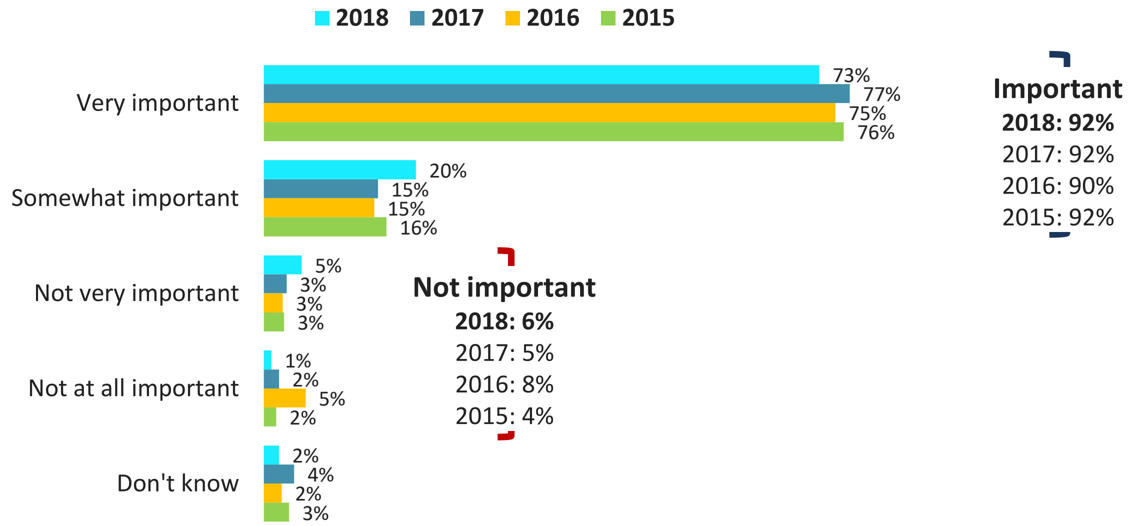
†Totals for some years of data displayed in each of the graphs do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

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) ; 2018 (n=500)

APPENDIX "A"

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 about three-quarters who believe it is very important. This figure has been fairly consistent since 2015.



†Totals for some years of data displayed in the graph do not add up to 100% because the proportions for each of the responses have been rounded, which can cause the total to be greater or less than 100%.

 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) ; 2018 (n=500)

DEMOGRAPHIC PROFILE

APPENDIX "A"

DEMOGRAPHIC PROFILE OF SURVEY RESPONDENTS

Gender	
Male	48%
Female	52%
Transgender	-
Gender not conforming	-
Prefer not to answer	-
Age	
18 – 34	31%
35 – 54	32%
55 and over	37%
Highest Education Level Completed	
Less than high school	3%
High school graduate or equivalent	22%
Some/completed trade/technical school	2%
Some/completed community college	24%
Some/completed university	36%
Graduate/professional studies	11%
Annual Household Income Before Taxes	
Less than $25,000	10%
$25,000 to less than $50,000	17%
$50,000 to less than $75,000	15%
$75,000 to less than $100,000	15%
$100,000 to less than $150,000	13%
$150,000 or more	8%

Number of People Living in Home	
One	17%
Two	36%
Three	19%
Four	14%
Five or more	12%
Number of Children Under the Age of 18 in Home	
0	58%
1-2	26%
3 or more	8%
Don't know/ Refused	8%
Number of Years Living in London	
Less than 1 year	2%
1 to less than 5 years	7%
5 to less than 10 years	5%
10 to less than 20 years	18%
20 years or more	68%
Own or Operate a Business	
Yes	10%
No	89%
Don't know	1%
Rent or Own Home	
Own	75%
Rent	23%

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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.

APPENDIX "B"

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

London
CANADA

GENDER	IPSOS SURVEY	STATS-CAN CENSUS
Male	48%	48%
Female	52%	52%
Transgender	0%	N.A.
Gender not conforming	0%	N.A.
Prefer not to answer	0%	N.A.

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

Education Level (1)	IPSOS SURVEY	STATS-CAN CENSUS
Less than high School	3%	14%
High School/Equivalent	22%	23%
Trades/ Technical	2%	6%
College	24%	18%
University	36%	14%
Post Graduate Studies	11%	8%

Household Income (1)	IPSOS SURVEY	STATS-CAN CENSUS
< $25,000.00	10%	14%
$25,000.00 to $49,999.00	17%	30%
$50,000.00 to $74,999.00	15%	22%
$75,000.00 to $99,999.00	15%	11%
$100,000 to 149,999.00	13%	14%
> $150,000.00	8%	8%

(Annualized income before taxes)

Number of People Living in Home	IPSOS SURVEY	STATS-CAN CENSUS
One	17%	32%
Two	36%	34%
Three	19%	15%
Four	14%	12%
Five or more	12%	7%

Number of Children <18 Living at Home (1)	IPSOS SURVEY	STATS-CAN CENSUS
None	58%	39%
1 or 2	26%	51%
3 or more	8%	10%

Number of Years Living in London	IPSOS SURVEY	STATS-CAN CENSUS
<1 Year	2%	N.A.
1 to 5 Years	7%	N.A.
5 to 10 Years	5%	N.A.
10 to 20 Years	18%	N.A.
> 20 Years	68%	N.A.

Business Owner (1)	IPSOS SURVEY	STATS-CAN CENSUS
Yes	10%	8%
None	89%	92%
Don't know	1%	N.A.

Rent or Own Home (1)	IPSOS SURVEY	STATS-CAN CENSUS
Own	75%	63%
Rent	23%	37%