FORUM RESEARCH INC.

Annual Resident Satisfaction Survey

The City of London

October 2022

London CANADA

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Survey Background

Objectives

Forum Research Inc. is pleased to present the City of London with the results of the 2022 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 satisfaction and drivers of satisfaction (i.e., perceived importance);
- Perceptions of value for tax dollar and taxes in general;
- Sense of welcoming and belonging to the city.

Executive Summary

Executive Summary

Life in the City of London

- The vast majority of residents (TOP2: 82%) rate the quality of life in the City of London as either good or very good. This proportion has decreased from the previous year (TOP2: 87%). *Slide 21*
  - Factors contributing to Londoners good quality of life include it being a friendly and nice city (20%), being safe (17%), having lots to do (17%), having a good standard of living (17%), and having everything they need (15%). *Slide 24*

- Most residents (TOP2: 81%) agree that London is a welcoming community, and about 4 in 5 (TOP2: 79%) agree that they have a strong sense of belonging to the city. These proportions have remained relatively stable from 2021 (TOP2: 85%, 82% respectively). *Slide 47*

Executive Summary

Issues & Priorities

- However, there are some concerns expressed by residents: *Slide 15*
  - Poverty (NET: 47%) remains the biggest ongoing issue facing the city, with more respondents (+17%) mentioning homelessness (44%) as a concern compared to 2021.
  - Transportation (NET: 30%) is another pressing issue, especially traffic/road congestion (17%) and inadequate public transit/transportation (14%).
  - Additionally, and consistent with previous years, development and infrastructure remains a top concern for Londoners (NET: 28% vs 23%).

- When asked about what priorities should the City Council focus on in the next 4 years:
  - More than a third (36%) think they should focus on tackling poverty, specifically reducing the number of residents experiencing homelessness (34%) *Slide 18*
  - Economic issues (26%) are also important aspects that should be prioritized, especially in increasing affordable housing (18%) *Slide 18*
  - Additionally, transportation should be a City Council priority (26%), such as improving the public transit (15%) *Slide 18*

Executive Summary

Core Services & Satisfaction

- The majority of London residents are satisfied with City services, namely the quality of service delivery (TOP2: 71%), accessibility of services (TOP2: 70%), and time it takes to receive services (TOP2: 57%). These proportion have slightly decreased from 2021 (TOP2: 80%, 75%, 68%, respectively). *Slide 30*

- Public libraries (TOP2: 95%), drinking water (TOP2: 93%), parks/other green spaces (TOP2: 89%) and recreation facilities (TOP2: 89%) are the services residents are most happy with. *Slide 31*
  - On the contrary, London residents expressed the least satisfaction with social or affordable housing (TOP2: 22%) *Slide 33*

- A statistical analysis has been used to show the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction (i.e., perceived importance). Findings from this analysis found 5 primary areas of improvement for the City: *Slides 35-36*
  - Public Transit
  - Social Services
  - City Expansion/ Protection of Farmland
  - Roads
  - Revitalization of Older Neighbourhoods

London CANADA

Executive Summary

Spending and Taxation

- Most London residents (TOP2: 76%) say they receive a good value for their tax dollars. This proportion has remained relatively stable over the years. *Slide 38*
- In order to help the City balance taxation and service delivery levels, the majority of respondents chose increasing taxes (NET: 53%) over cutting services (NET: 30%). Additionally, more respondents this year are in favor of increasing taxes to maintain current service levels or enhance or expand services, compared to 2021 (NET: 48%). *Slide 40*
  - Of those who support increasing taxes, 30% believe that these dollars should be used to maintain current service levels, while 23% would rather services be enhanced or expanded services. *Slide 40*

Experience with City Staff

- The proportion of London residents who have had contact with the City has slightly increase over the years (2022: 46%). The majority of those who have contacted the City are satisfied with the service they received (TOP2: 67%), and said they received all the service and support they needed (70%). *Slides 42-44*
  - These residents also felt that the staff were courteous (TOP2: 81%), fair (TOP2: 81%), knowledgeable (TOP2: 79%), and went an extra mile to help them (TOP2: 52%). *Slide 45*

Methodology

Methodology

Method: CATI (Computer Aided Telephone Interview)

Criteria for Participation: Residents in the City of London who are 18 years of age or older

Sample Size: n=500

Average Length: 19.8 min

Margin of Error: ± 4.38%

Fieldwork Dates: September 23rd – October 17th, 2022

Additional Notes:

- CATI sample was drawn using random digit dialing (RDD) among City of London residents. A mix of landline and cell phone sample was used to reach cell phone-only households.
- Results throughout this report have been statistically weighted by age and gender, to ensure that the sample reflects the target population according to 2021 Census data.
- Tracking data has been included where possible. Please note that the 2013 data comes from an online survey conducted by another vendor. Data from 2015 to 2019 was also conducted by another vendor, though methodology has been as closely matched as possible. Caution should be used in comparing the 2013 online data to the 2015 to 2022 telephone data because of the methodological differences in the data collection approaches.
- Comparisons to other Canadian municipalities have been included where possible.
- Significant differences across sub-groups are noted where they exist.

Reporting Considerations

TOP2 / BTM2

Top 2 (TOP2) and Bottom 2 (BTM2) reference the collected TOP2 positive and BTM2 negative responses, respectively where applicable. For example, a TOP2 grouping referred to as “satisfied” may be the combined result of “very satisfied” and “somewhat satisfied,” where a grouping of “not satisfied” (BTM2) may be the combined result of “not very satisfied” and “not at all satisfied.”

Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., “Which of the following communication methods have you used?”), it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select “email” and “physical mail/inserts” as their answer.

Significance Testing

Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes. It is important to point out that, statistical differences exist only between the segments mentioned in the notes. In demographic breakout slides, statistically significant results (at the 95% confidence level) are highlighted in red and statistically significant differences between segments are indicated with letters. Each segment is denoted with letters (e.g., J, K, L, etc.). If the letter “J” appears under the response of a certain segment, this indicates that the response of that segment is significantly higher than the response of the segment denoted with the letter “J”.

Detailed Findings

Top of Mind Issues

Top of Mind Issues

Nearly half (47%) of residents say poverty is the most important issue facing the city – a significant increase from 28% in the previous year.

Issue	2022	2021	2019	2018	2017	2016	2015
NET: Poverty*	**47%**	**28%**	**12%**	**4%**	**5%**	5%	**3%**
Homelessness	44%	27%	10%	3%	4%	3%	2%
Poverty	5%	4%	3%	1%	2%	3%	1%
NET: Transportation*	**30%**	**34%**	**38%**	**35%**	**36%**	**23%**	**13%**
Traffic/road congestion/traffic lights	17%	22%	10%	7%	4%	5%	4%
Inadequate public transit/transportation	14%	12%	20%	17%	17%	17%	10%
Rapid transit/support rapid transit	3%	6%	4%	1%	10%	-	-
Opposition to rapid transit	1%	1%	3%	7%	4%	-	-
NET: Development/Infrastructure*	**28%**	**23%**	**21%**	**20%**	**11%**	**19%**	**21%**
Roads/Road repair/snow removal/poorly maintained roads	11%	13%	12%	11%	5%	9%	11%
*** Housing - lack of affordable housing	10%	20%	11%	3%	4%	2%	2%
Infrastructure	8%	9%	8%	3%	3%	8%	7%
Development urban sprawl/loss of greenspace	3%	5%	5%	3%	2%	2%	3%
Parking	1%	1%	-	-	-	-	-
NET: Health*	**20%**	**-**	**-**	**-**	**-**	**-**	**-**
*** Mental health / Drug addiction	13%	10%	-	-	-	-	-
*** Hospital wait times / lack of medical care	7%	4%	4%	4%	-	-	-
*** COVID-19 (e.g. restrictions, vaccines, in general)	2%	8%	-	-	-	-	-

Poverty has become the most important issue facing the city with nearly 1 in 2 (NET: 47%) residents saying so. Specifically, mentions of homelessness (from 27% to 44%) drives this increase.

Transportation is identified as the next most important issue by residents with 3 in 10 (NET: 30%) saying so. Specifically, nearly 1 in 5 (17%) mentioned 'traffic/road congestion/traffic lights'.

Around 3 in 10 (NET: 28%) residents say development and infrastructure is the most important issue facing the city – remaining consistent with previous years.

1 in 5 (NET: 20%) residents also say health is the most important issue facing the city with mental health and drug addiction as the most important health issue (13%).

Fewer residents are finding the COVID-19 pandemic as an important issue facing the city compared to the previous year (from 8% to 2%).

*** In 2015-2021, mentions were not grouped under the net categories. So, the net percentages do not include these mentions in these previous years.

*Net categories for multiple response questions are calculated by adding up the number of responses (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents.
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500).

Top of Mind Issues (cont'd)

Issue	2022	2021	2019	2018	2017	2016	2015
NET: Economy*	**20%**	**5%**	**7%**	**4%**	**4%**	**13%**	**13%**
High interest rates	12%	-	-	-	-	-	-
Unemployment/ Jobs/ poor job market	3%	5%	6%	4%	3%	12%	12%
High inflation rates	2%	-	-	-	-	-	-
*** Economic growth / attract, retain businesses / manufacturing	2%	3%	3%	2%	-	-	-
*** Social assistance (e.g. employment insurance, sick benefits, etc.)	2%	1%	-	-	-	-	-
Taxes	2%	3%	6%	3%	3%	5%	6%
NET: Mayor/City government*	**2%**	**4%**	**8%**	**4%**	**4%**	**4%**	**4%**
Fiscal management/government spending/budget	1%	3%	4%	2%	-	-	-
Poor government/political infighting/no leadership	1%	2%	3%	1%	2%	-	-

1 in 5 (NET: 20%) residents also say the economy is the most important issue facing the city. Specifically, around 1 in 10 (12%) mentioned 'high interest rates'.

A few residents also say the city government (2%) are the most important issues facing the city.

*** In 2015-2021, mentions were not grouped under the net categories. So, the net percentages do not include these mentions in these previous years.

*Net categories for multiple response questions are calculated by adding up the number of responses (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents.
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500).

Top of Mind Issues (cont'd)

Issue	2022	2021	2019	2018	2017	2016	2015
NET: Other*	-	-	-	-	-	-	-
Public safety (e.g., crime, policing, speeding)	10%	14%	-	-	-	-	-
Education	4%	4%	4%	2%	-	1%	3%
Lack of support for vulnerable communities	3%	-	-	-	-	-	-
Environment/pollution	2%	4%	6%	3%	3%	5%	6%
Waste management (e.g., garbage collection, recycling, composting)	2%	2%	-	-	-	-	-
City cleanliness (e.g., dirty graffiti, needles lying around)	1%	1%	-	-	-	-	-
Senior care	1%	1%	-	-	-	-	-
Social equity (e.g., racism, discrimination, Indigenous issues)	<1%	3%	-	-	-	-	-
Other	4%	9%	-	-	-	-	-
Nothing	1%	3%	3%	5%	5%	4%	2%
Don't know/Refused	5%	5%	9%	8%	12%	10%	13%

Public safety is also another common important issue in the city identified by 1 in 10 residents (10%).

*Net categories for multiple response questions are calculated by adding up the number of responses (not percentages) for each sub-category and dividing the total number by the total sample size.
Q1. What are the most important issues facing the City of London? That is, what issues should receive the greatest attention from City Council? [Multi-select];
Framework: All respondents.
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500).

Priorities Over the Next 4 Years

More than a third (36%) of residents thinks the City Council should tackle poverty (36%) in the next 4 years, specifically reducing the number of residents experiencing homelessness (34%).

Priority	2022
NET: Poverty	**36%**
Reduce the number of residents experiencing homelessness	34%
Reduce the number of residents experiencing poverty	6%
NET: Economics	**26%**
Increase affordable housing	18%
Economic growth / attracting, retaining businesses / manufacturing	6%
Reducing unemployment	3%
Reducing taxes	3%
NET: Transportation	**26%**
Improve public transit / transportation	15%
Reduce traffic and road congestion	12%
Increase access to public transit / transportation	5%
Improve quality of pedestrian environments	3%
NET: Development / Infrastructure Items	**21%**
Improve maintenance of roads (including road repair and snow removal)	13%
Increase development / quality of housing options	9%
Development of green spaces (e.g., parks, conservation areas)	3%

Poverty is the most important issue that residents think the City Council should prioritize, especially in reducing the number of residents experiencing homelessness (34%).

Two other important aspects that should be prioritized are economic issues (NET: 26%), such as increasing affordable housing (18%), as well transportation issues (NET: 26%), such as improving public transit (15%).

Around 1 in 5 residents (NET: 21%) say development and infrastructure should be a City Council priority, for instance improving the maintenance of roads (13%).

*Net categories for multiple response questions are calculated by adding up the number of responses (not percentages) for each sub-category and dividing the total number by the total sample size.
(NEW) Q1B. In your opinion, what priorities should the City Council focus on in the next 4 years?. [Multi-select];
Framework: All respondents.
Sample Size: 2022 (n=500)

Priorities Over the Next 4 Years (cont'd)

Priority	2022
NET: Health / Wellbeing	**17%**
Improve access to mental health and addiction resources	13%
Improve health and well-being of residents	**7%**
NET: Climate Change / Sustainability	**5%**
Improve education / schools	3%
Increase education amongst residents towards supporting the environment	1%
Protecting and conserving natural areas	1%
Promote waste reduction in the city	1%
NET: Mayor / City Gov't	**4%**
Reduce barriers to access city services and information	2%
Improve public accountability and transparency in the local government	2%
NET: Sustainability	**2%**
Promote and increase waste reduction	2%
NET: Other	**19%**
Improve public safety (e.g., crime, policing, speeding)	9%
Improve access to support for vulnerable populations	4%
Improve access to recreation, sports and leisure activities	3%
Improve the feeling of welcoming and inclusion in the city	2%
Other	3%

Nearly 1 in 5 (NET: 17%) residents also say that health should be a priority. Specifically, around 1 in 10 (13%) mentioned 'improved access to mental health and addiction resources'.

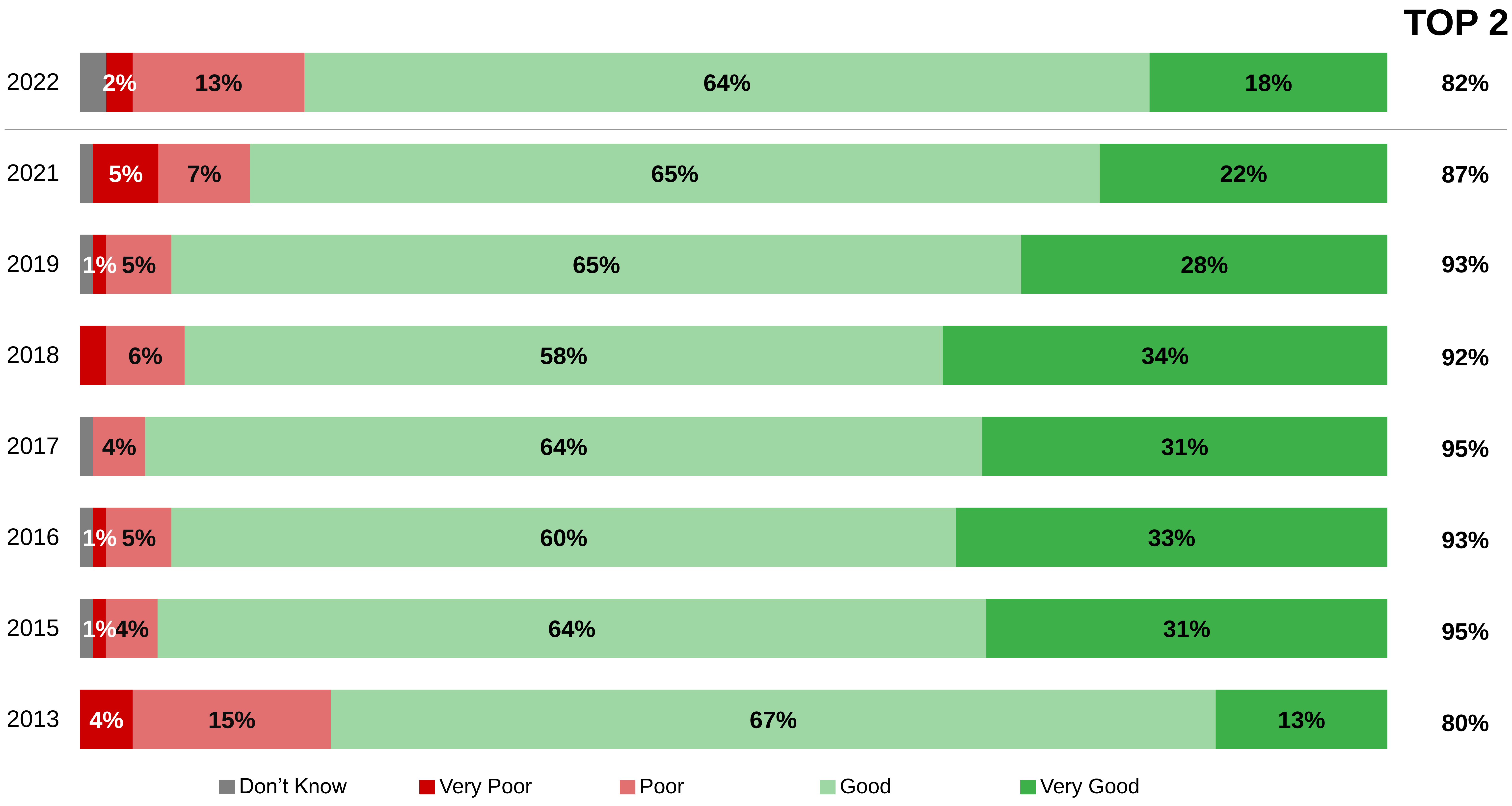
A few residents also say that climate change (5%), government issues (4%), and sustainability (2%) should be priorities for the City Council.

*Net categories for multiple response questions are calculated by adding up the number of responses (not percentages) for each sub-category and dividing the total number by the total sample size.
(NEW) Q1B. In your opinion, what priorities should the City Council focus on in the next 4 years?. [Multi-select];
Framework: All respondents.
Sample Size: 2022 (n=500)

Quality of Life

Quality of Life

Around 8 in 10 (TOP2: 82%) residents rate their quality of life in London as good or very good – a decrease from the previous year (TOP2: 87%).



The majority of London residents (TOP2: 82%) say their quality of life in London is good or very good, with around 1 in 5 (18%) saying it’s very good.

There has been a decrease of residents saying they have a good quality of life compared to 2021 (TOP2: 82% vs TOP2: 87%), however the vast majority still rate their quality of life in London positively.

Nearly 2 in 10 (BTM2: 15%) residents rate their quality of life in London poorly.

Q2. How would you rate the overall quality of life in the City of London today? Would you say it’s…?
Framework: All respondents.
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500); 2013 (n=501).

Quality of Life - Demographics

Perceptions of a very good quality of life are highest among residents who are aged 55+ (25%), and have completed university studies (27%).

Quality of Life (% Very Good)

Year	Total	Gender		Age			Income			Education					
		Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College / Tech/ Uni	Comp. College /Tech	Comp. Uni	Comp. Post Grad
		A	B	C	D	E	F	G	H	I	J	K	L	M	N
2022	19%	22%	15%	18%	11%	25%	19%	21%	18%	16%	15%	14%	13%	27%	18%
						D								L	
2021	22%	28%	17%	14%	23%	27%	17%	19%	32%	0%	18%	20%	16%	27%	34%
		B				C			FG		I	I	I	IM	IJM
2019	28%	28%	29%	19%	34%	33%	18%	29%	37%						
					C	C			F						
2018	34%	35%	34%	26%	42%	34%	25%	41%	41%						

Residents aged 55 and older are more likely to rate their quality of life in London as very good compared to those aged 35 to 54 (25% vs 11%).

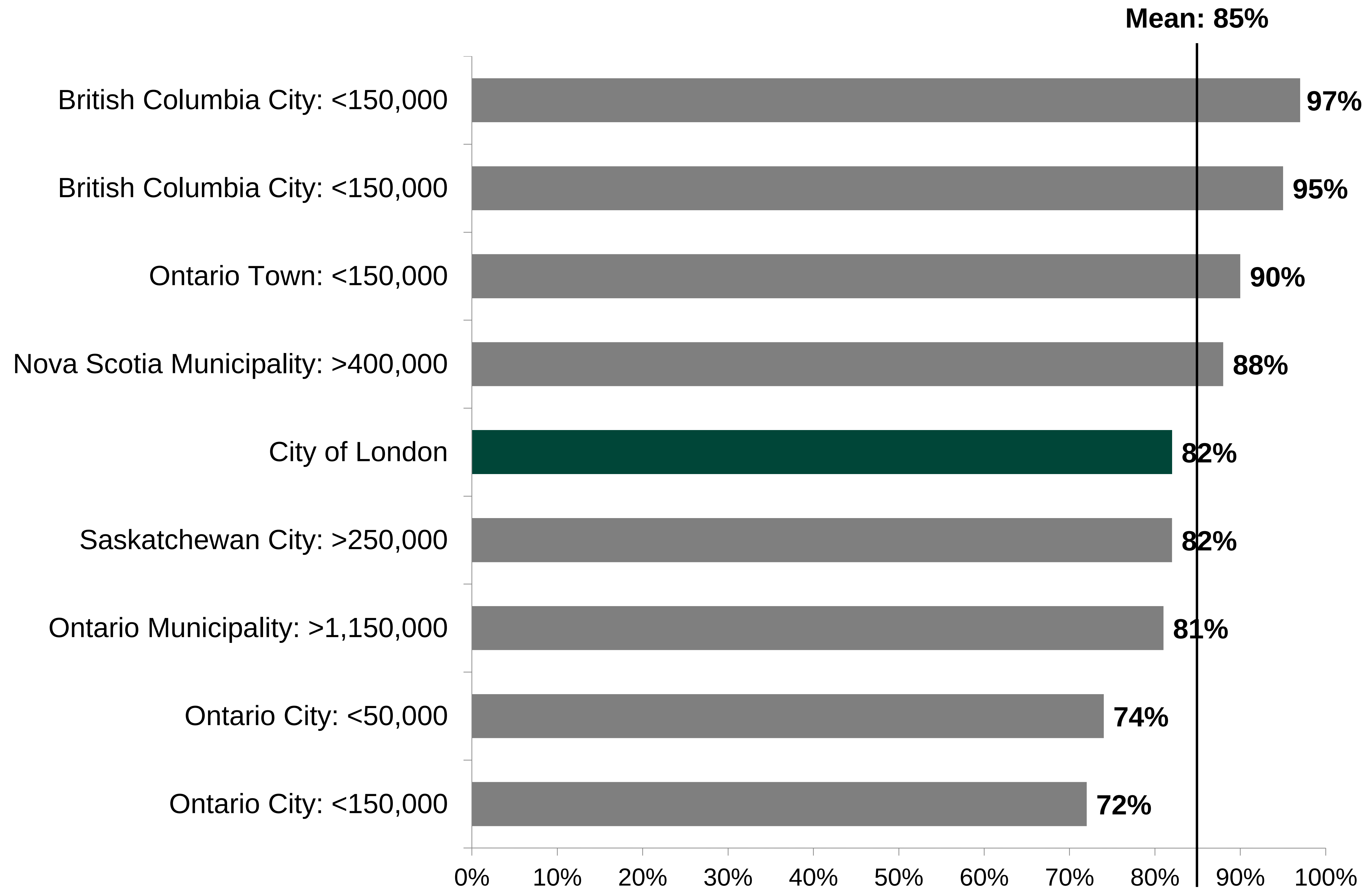
Residents who completed university studies are also more likely to say they have a very good quality of life in London than those who completed college (27% vs 13%).

Residents who find the city welcoming (21%) and feel that they belong (22%) are more likely to express a very good quality of life compared to those who don't.

*Education categories were different in previous years, and thus are not shown above.
Q2. How would you rate the overall quality of life in the City of London today? Would you say it's…?
Framework: All respondents;
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500).

Quality of Life - Benchmarks

82% of City of London residents rate their quality of life as ‘good’ or ‘very good’ – which is close to the average score (85%) of 8 municipalities in Canada.



When compared with other municipalities, the City of London ranks close to the average rating of quality of life.

*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2020-2022. Comparisons for this question include 8 municipalities across Canada, with populations ranging from ~50,000 to ~1,150,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

*Municipalities with a population of 100,000 to 500,000 in Southern Ontario have been included in the analysis.
*The ‘Don’t Know’ was excluded from analysis to make it comparable with other municipalities.
Q2. How would you rate the overall quality of life in the City of London today? Would you say it’s…?
Framework: All respondents;
Sample Size: 2022 (n=500).

Reason for Good Quality of Life

A fifth (20%) of those who say their quality of life in the city is good is because it is a good, friendly or nice city.

Reason	2022	2021	2019	2018	2017	2016	2015
Good/Friendly/Nice City	**20%**	23%	13%	7%	13%	18%	20%
Safe city/ Low crime	**17%**	16%	13%	15%	13%	17%	16%
Lots to do (Events, activities, amenities, culture, entertainment, etc.)	**17%**	16%	20%	17%	13%	20%	17%
Quality of life/ Good standard of living/ Better than other cities	**17%**	12%	12%	17%	5%	10%	10%
Convenience – Everything you need is here	**15%**	15%	8%	7%	8%	8%	10%
Nature trails/Parks	**13%**	10%	8%	11%	5%	10%	7%
Good income/Have a job here	**12%**	11%	11%	11%	9%	8%	6%
Environment – Clean, green, beautiful	**12%**	11%	7%	6%	11%	10%	12%
Affordable living	**10%**	7%	6%	7%	4%	5%	11%
Healthcare	**8%**	10%	7%	9%	6%	8%	5%
Good schools	**7%**	8%	8%	8%	7%	5%	6%
Good services (police/fire)/Social programs	**7%**	10%	6%	7%	6%	9%	8%
Right size/ Not too big	**6%**	5%	10%	9%	11%	10%	12%
Easy to get around (not overcrowded)	**5%**	6%	7%	5%	4%	5%	3%
Pleasant neighbourhood(s)	**4%**	10%	5%	5%	2%	5%	3%
Transportation / Public transit	**4%**	-	-	-	-	-	-
Other	**4%**	8%	-	-	-	-	-

The most common reason for residents having a good quality of life in the city is because it is a good, friendly or nice city (20%).

Other common reasons the residents identified for their good quality of life include:

- It is a safe city/There’s low crime (17%)
- There’s lots to do in the city (17%)
- Quality of life/ Good standard of living/ Better than other cities (17%)

The identified reasons for having a good quality of life remain similar to previous years.

Q3a. Why do you think the quality of Life is [good/ very good]? *Visualization does not include responses with less than 5% mentions.*
Framework: Respondents who said good/very good;
Sample Size: 2022 (n=416); 2021 (n=441).

Reason for Poor Quality of Life

Around 1 in 3 of those who say they have a poor quality of life in the city say it's because of homelessness (41%), high cost of living (36%), and crime/public safety (30%).

Reason	2022	2021
Homelessness	**41%**	24%
Cost of living is high	**36%**	23%
Crime / Public safety / Policing	**30%**	23%
Drug addiction / Mental health issues	**26%**	17%
Housing / Lack of availability or affording	**24%**	19%
Social / Economic issues (e.g. divisions, poverty, etc.)	**20%**	9%
Employment opportunities / Jobs	**15%**	5%
Downtown is poorly maintained (e.g. abandoned, dirty, unattractive, etc.)	**14%**	12%
Infrastructure (e.g. roads, etc.)	**13%**	4%
Transit / Transportation	**12%**	6%
Health care	**11%**	6%
COVID-19 (e.g. vaccines, restrictions, in general, etc.)	**11%**	10%
Government (e.g. overspending, unethical, uncaring, etc.)	**8%**	8%
Other*	**8%**	11%
Don't know	**1%**	3%

Around a third of residents who perceive a poor quality of life in the city is because it of homelessness (41%), cost of living (36%), and crime/public safety/policing (30%)

Other common reasons that contributes to the poor quality of life of residents include:

- Mental health/drug addiction (26%)
- Lack of affordable housing (24%)
- Social/Economic issues (20%)

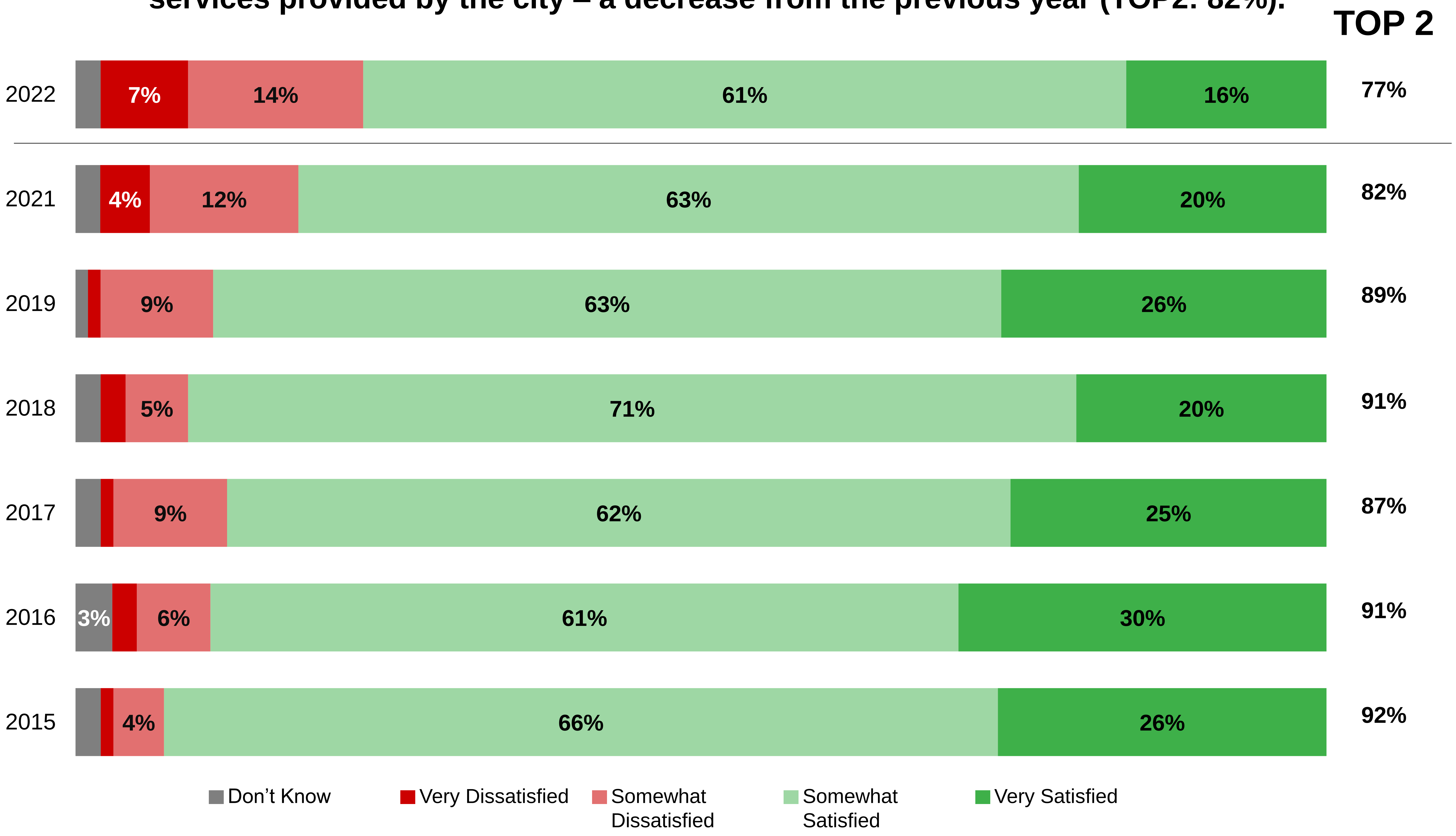
Residents this year tend to identify more reasons for a poor quality of life compared to last year.

*Other responses include single mentions that cannot be grouped into categories.
Q3b. Why do you think the quality of life is [poor/ very poor]? (open-end);
Framework: Respondents who said poor/very poor;
Sample Size: 2022 (n=76). 2021 (n=63)

City Service Assessment

Overall Satisfaction

Around 3 in 4 London residents (TOP2: 77%) are satisfied with the overall level and quality of services provided by the city – a decrease from the previous year (TOP2: 82%).



The majority of London residents (TOP2: 77%) say they are satisfied with the overall level and quality of services provided by the City, with 1 in 6 (16%) saying they are very satisfied.

The number of residents being satisfied with City services has decreased slightly compared to 2021 (TOP2: 82%). Despite this, the majority of residents are satisfied overall with the services the City provides.

Around 1 in 5 (BTM2: 21%) residents say they are not satisfied with City services.

Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents; **Sample Size**: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500).

Overall Satisfaction - Demographics

Residents who are very satisfied with city services tend to be those who completed university (24%).

Satisfaction with City Services (% Very Satisfied)

Year	Total	Gender		Age			Income			Education					
		Male	Female	18-34	35-54	55+	< $50K	$50K - < $100K	$100K +	Elem. / Some H.S.	H.S. Grad	Some College / Tech/ Uni	Comp. College /Tech	Comp. Uni	Comp. Post Grad
		A	B	C	D	E	F	G	H	I	J	K	L	M	N
2022	**16%**	**17%**	**16%**	**16%**	**13%**	**19%**	**17%**	**17%**	**12%**	**16%**	**15%**	**7%**	**12%**	**24%**	**11%**
														KLN	
2021	20%	21%	19%	22%	16%	21%	20%	20%	16%	13%	22%	23%	15%	19%	25%
2019	26%	28%	24%	27%	27%	26%	-	-	-	-	-	-	-	-	-
2018	20%	19%	21%	14%	17%	27%	-	-	-	-	-	-	-	-	-

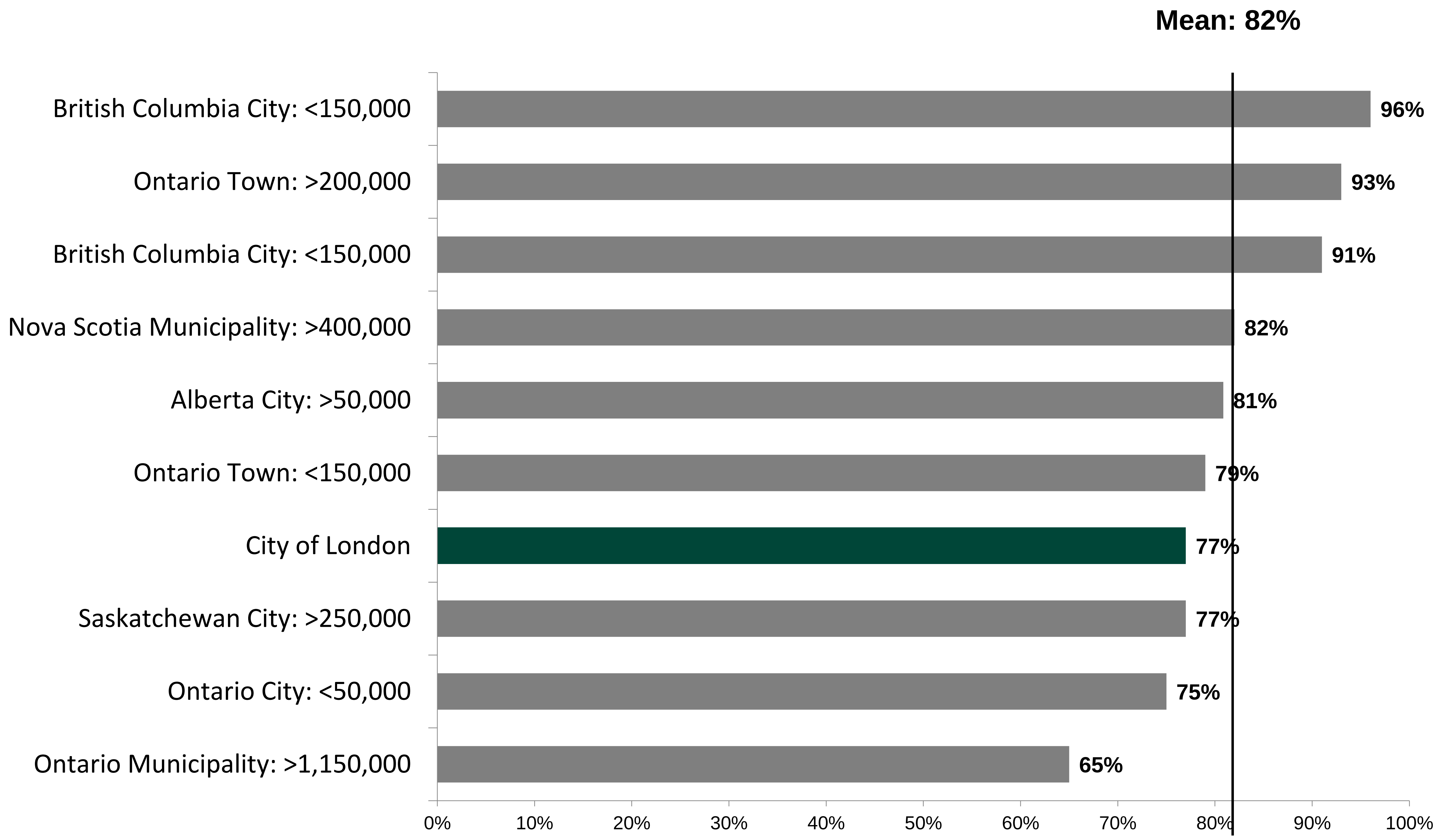
Residents who have a university degree are more likely to be very satisfied with city services (24%).

Residents who find the city welcoming (19%) and feel that they belong (18%) are more likely to express that they are very satisfied with overall City services.

Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents; **Sample Size**: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500).

Overall Satisfaction - Benchmarks

77% of City of London residents are satisfied with the overall services the City provides – which is below the average score (82%) of other Canadian municipalities.



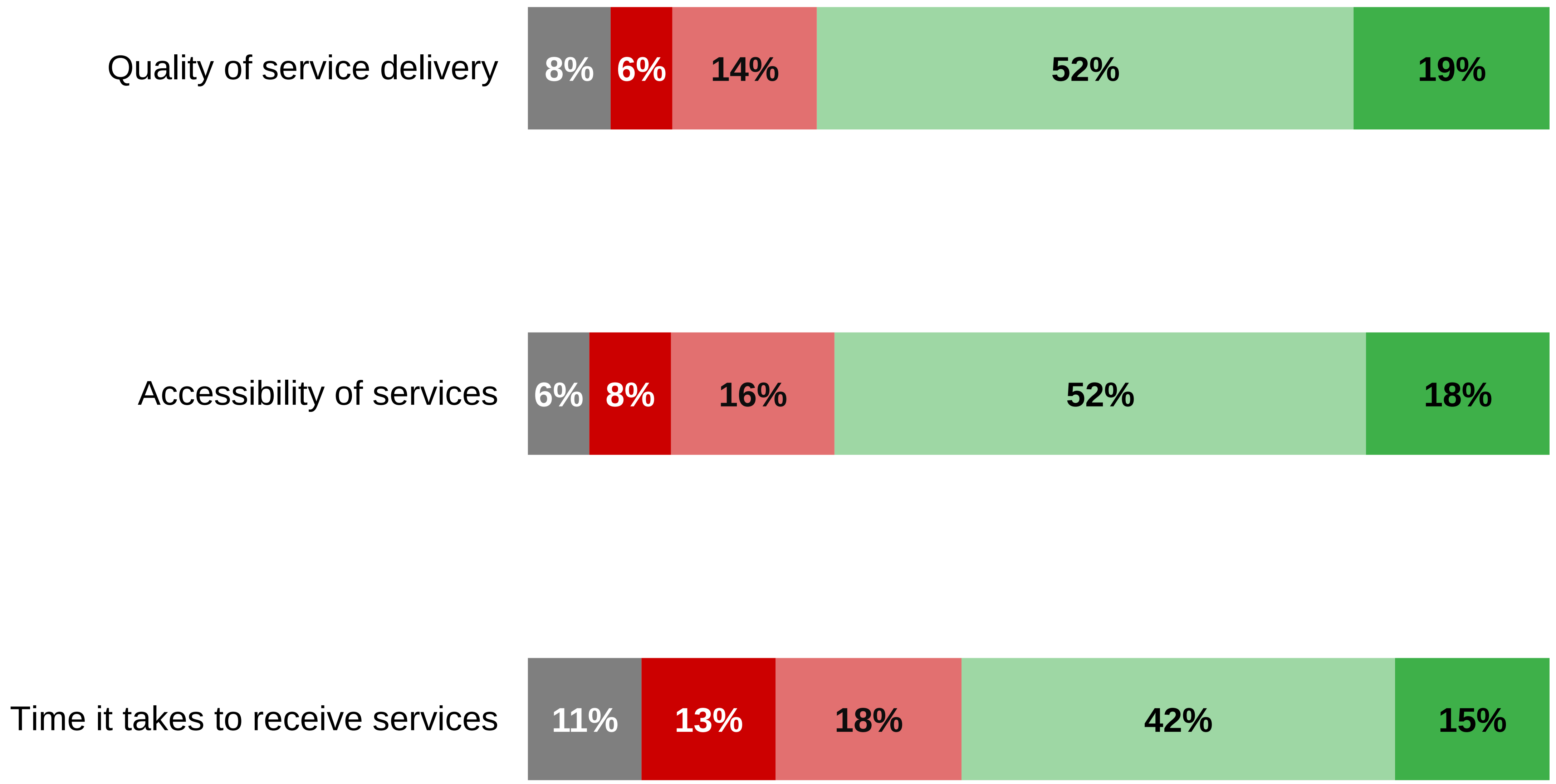
When compared with other municipalities, the City of London ranks below the average rating of City service satisfaction.

*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2020-2022. Comparisons for this question include 9 municipalities across Canada, with populations ranging from ~20,000 to ~1,150,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Q4a. Please tell me how satisfied or dissatisfied you are with the overall level and quality of services provided by the City of London, on a scale of very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied?
Framework: All respondents; **Sample Size**: 2022 (n=500).

Satisfaction with Aspects of Services

The majority of London residents are satisfied with the quality of service delivery (TOP2: 71%), the accessibility of services (TOP2: 70%), and the time it takes to receive services (TOP2: 57%). There has been a decrease in satisfaction with the quality and timeliness of service delivery compared to last year.



TOP 2

	2022	2021	2019	2018	2017	2016	2015
Quality of service delivery	**71%**	80%	85%	84%	84%	84%	87%
Accessibility of services	**70%**	75%	80%	81%	80%	83%	85%
Time it takes to receive services	**57%**	68%	72%	75%	71%	79%	79%

Residents are most satisfied with the quality of service delivery from the City, with 7 in 10 (TOP2: 71%) saying they are satisfied, and specifically 1 in 5 (19%) saying they are very satisfied.

7 in 10 (TOP2: 70%) say they are satisfied with the accessibility of City services, with 1 in 5 (18%) saying they are very satisfied.

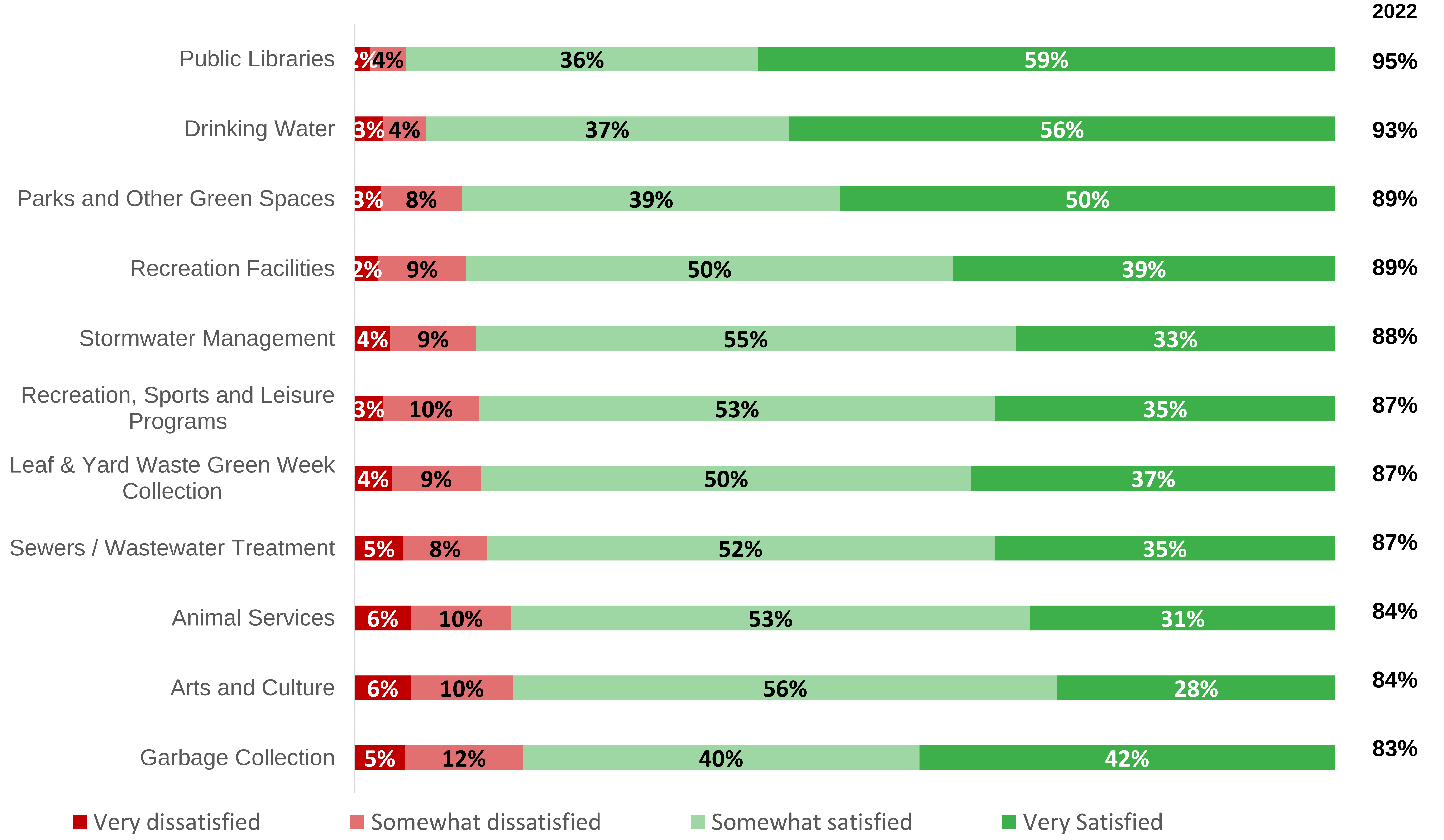
About 6 in 10 (TOP2: 57%) express their satisfaction with the timeliness of City services, with 1 in 7 (15%) saying they are very satisfied.

The proportion of residents being satisfied with the quality of service delivery, accessibility of services, and the timeliness of services has decreased from 2021.

Q4b-d. And using that same satisfaction scale, how about…?
Framework: All respondents;
Sample Size: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500).

Satisfaction with Individual Service

Majority of London residents are satisfied with 30 out of 33 services provided by the city. Residents are most satisfied with the public libraries in the city (TOP2: 95%).



Q5. Now we'd like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don't know
Sample Size: 2022 (n=500)

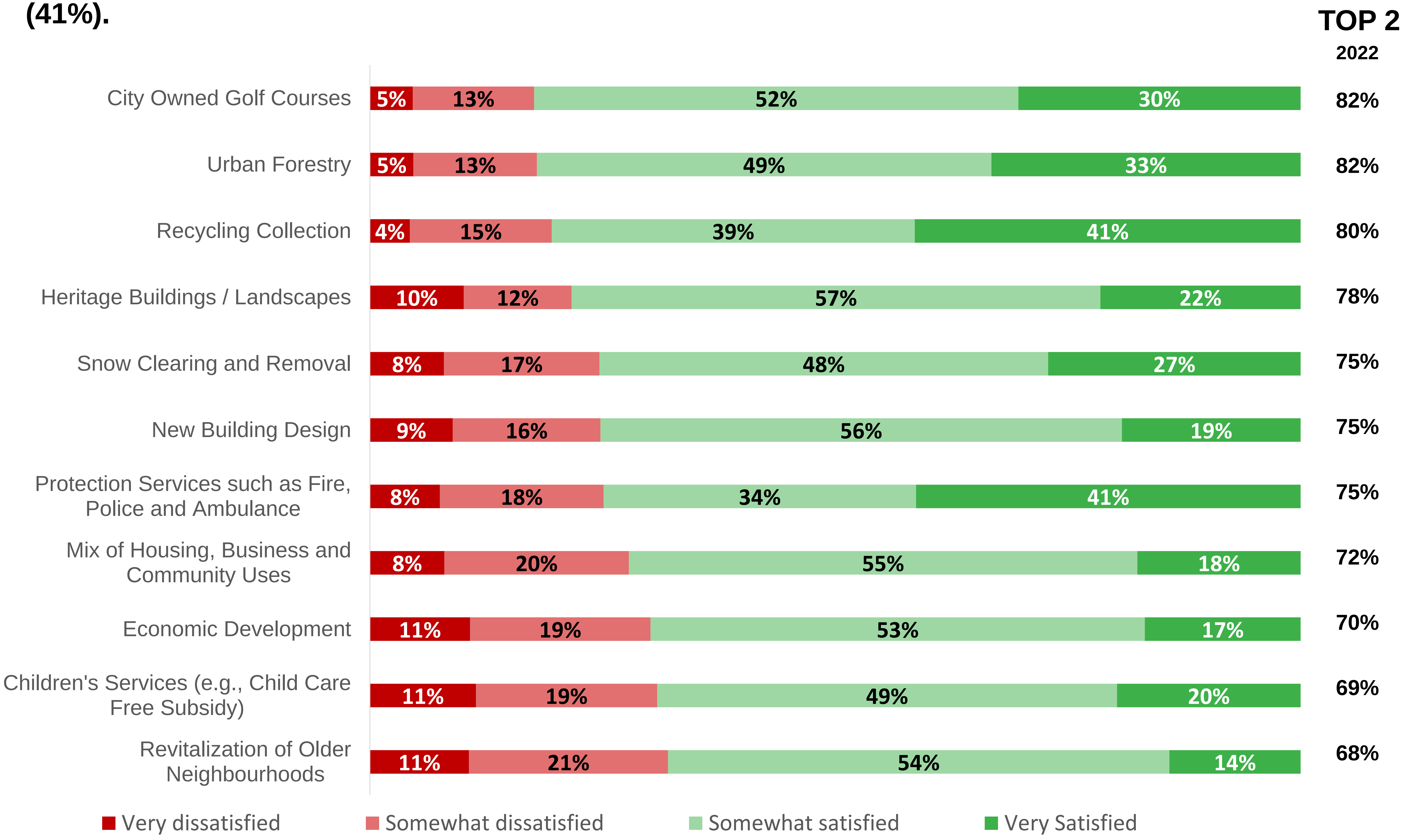
Majority of London residents are satisfied with 23 out of 33 services provided by the City. Residents are most satisfied with public libraries (TOP2: 95%) and drinking water (93%).

Around 9 in 10 residents are satisfied with the city's parks and other green spaces, recreation facilities, stormwater management, recreation, sports and leisure programs, leaf & yard waster green week collection, and sewers/ wastewater treatment.

More than 8 in 10 residents are also satisfied with the City's animal services, arts and culture, and garbage collection.

Satisfaction with Individual Service (cont'd)

Over 40% of residents are very satisfied with recycling collection (41%) and protection services (41%).



Around 8 in 10 residents are satisfied with the City owned golf course, urban forestry, recycling collection, and heritage building / landscapes.

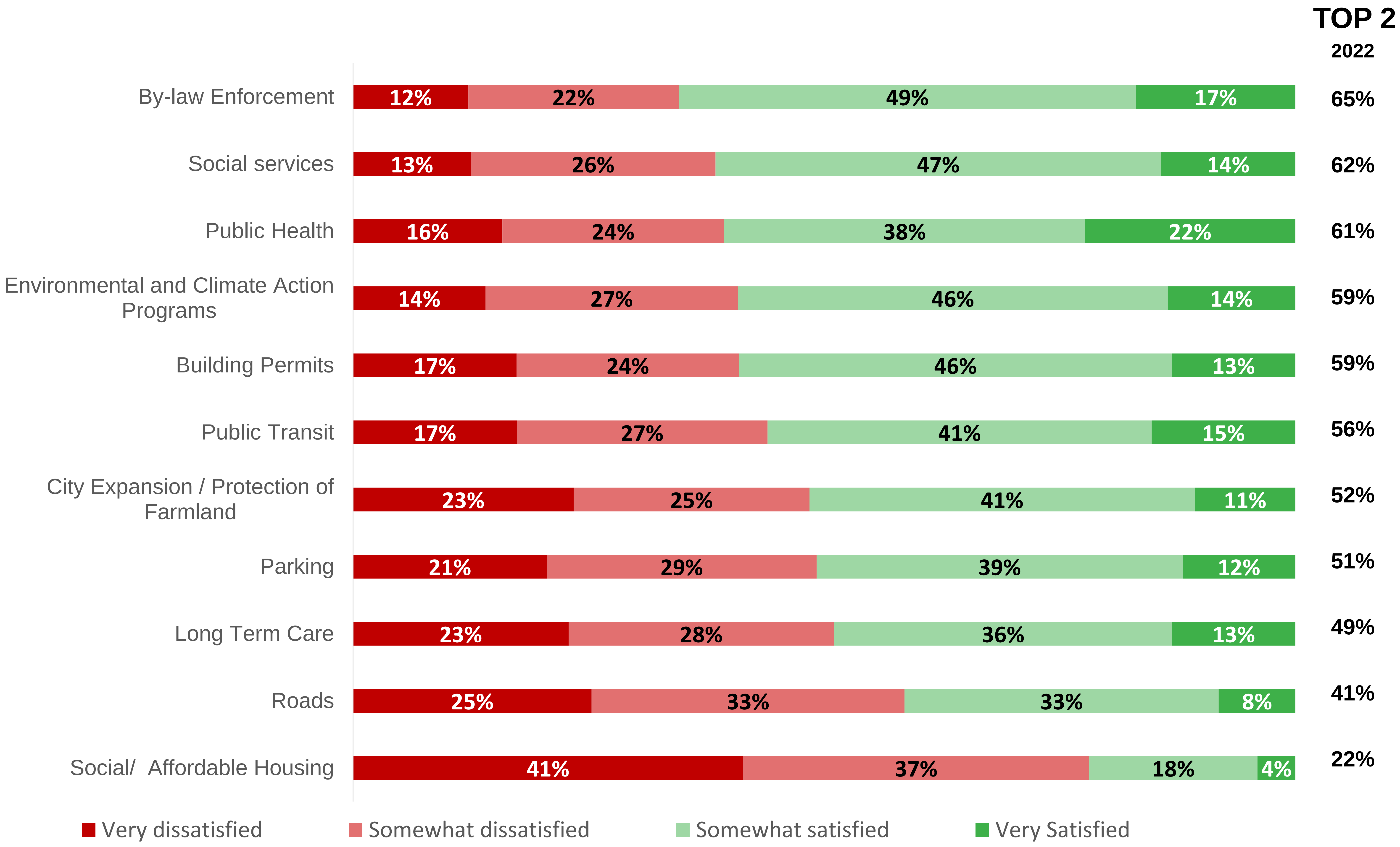
About three quarters of residents are satisfied with the City's snow clearing and removal, new building design, protection services, and the mix of housing / business / community uses.

Around 7 in 10 residents are satisfied with the City's economic development, children's service and revitalization of older neighbourhoods.

Q5. Now we'd like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don't know
Sample Size: 2022 (n=500)

Satisfaction with Individual Service (cont'd)

Residents are least satisfied with the social and affordable housing in the city (TOP2: 22%).



Less than half of residents are satisfied with the City's long-term care, roads and social/ affordable housing. Specifically, only 1 in 5 residents expressed satisfaction with social/ affordable housing.

Q5. Now we'd like to know how satisfied you are with a variety of services provided by the City of London.
Framework: All respondents, exclude don't know
Sample Size: 2022 (n=500)

Gap Analysis

Interpreting the Gap Analysis

The Gap analysis shows the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction.

- **Satisfaction scores** are plotted vertically (along the Y-axis). They represent overall stated satisfaction (TOP4%) with each of the individual City services.
- **Impact on overall satisfaction scores** are plotted horizontally across the bottom of the chart (along the X-axis). They are based on a statistical method called regression analysis that determines how a specific service ("independent variable") contributes to residents' overall satisfaction with the services ("dependent variable"). Impact on overall satisfaction can also be referred to as perceived importance.

As a result of the analysis, City services have distributed among four areas:

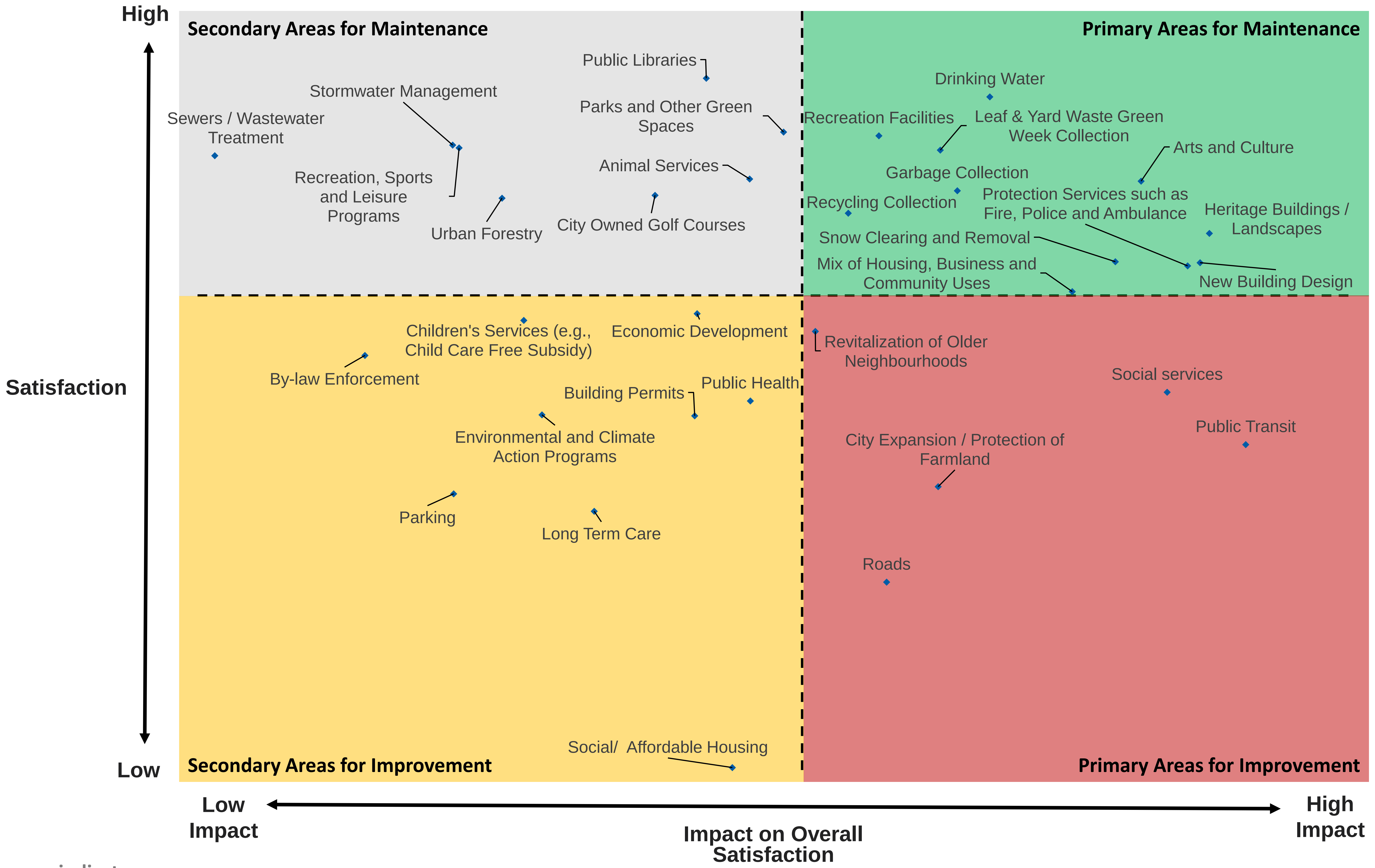
1. **Primary Areas for Improvement:**
Services that have the highest impact on overall satisfaction, but with lower individual satisfaction scores. The regression analysis identifies that these services are the strongest drivers of satisfaction. If the City can increase satisfaction in these areas, this will have the largest impact on overall satisfaction with City services.

2. **Secondary Areas for Improvement:**
Services that have relatively high impact on overall satisfaction and have lower individual satisfaction scores. This should be the secondary area of focus to improve the satisfaction scores.

3. **Primary Areas for Maintenance:**
Services that have relatively high impact on overall satisfaction and high individual satisfaction scores. The focus here is on maintaining the current level of service and satisfaction.

4. **Secondary Areas for Maintenance:**
Services with lower impact on overall satisfaction but high individual satisfaction scores. The focus here should also be to maintain current satisfaction levels.

Gap Analysis



- - - indicates mean

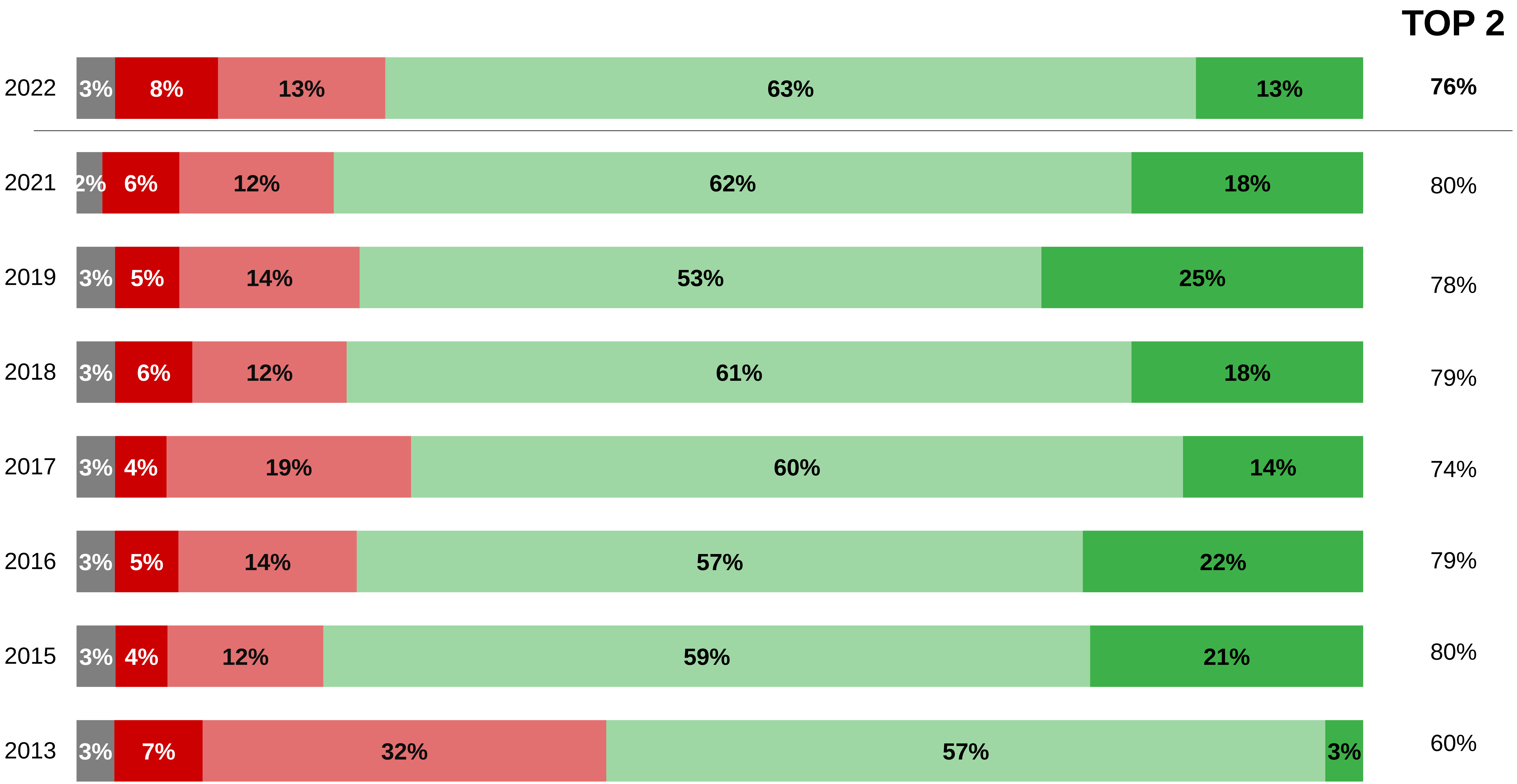
The services that the city should consider as **primary areas for improvement** include:

- Revitalization of Older Neighbourhoods
- Social Services
- City Expansion/ Protection of Farmland
- Public Transit
- Roads

Value for Tax Dollars

Value for Tax Dollars

3 in 4 (TOP2: 76%) residents believe that they receive good value of programs and services from the city for their tax dollars.



3 in 4 (TOP2: 76%) London residents say they receive an overall good value of City programs and services for their tax dollars, with more than 1 in 10 (13%) saying they receive a 'very good' value.

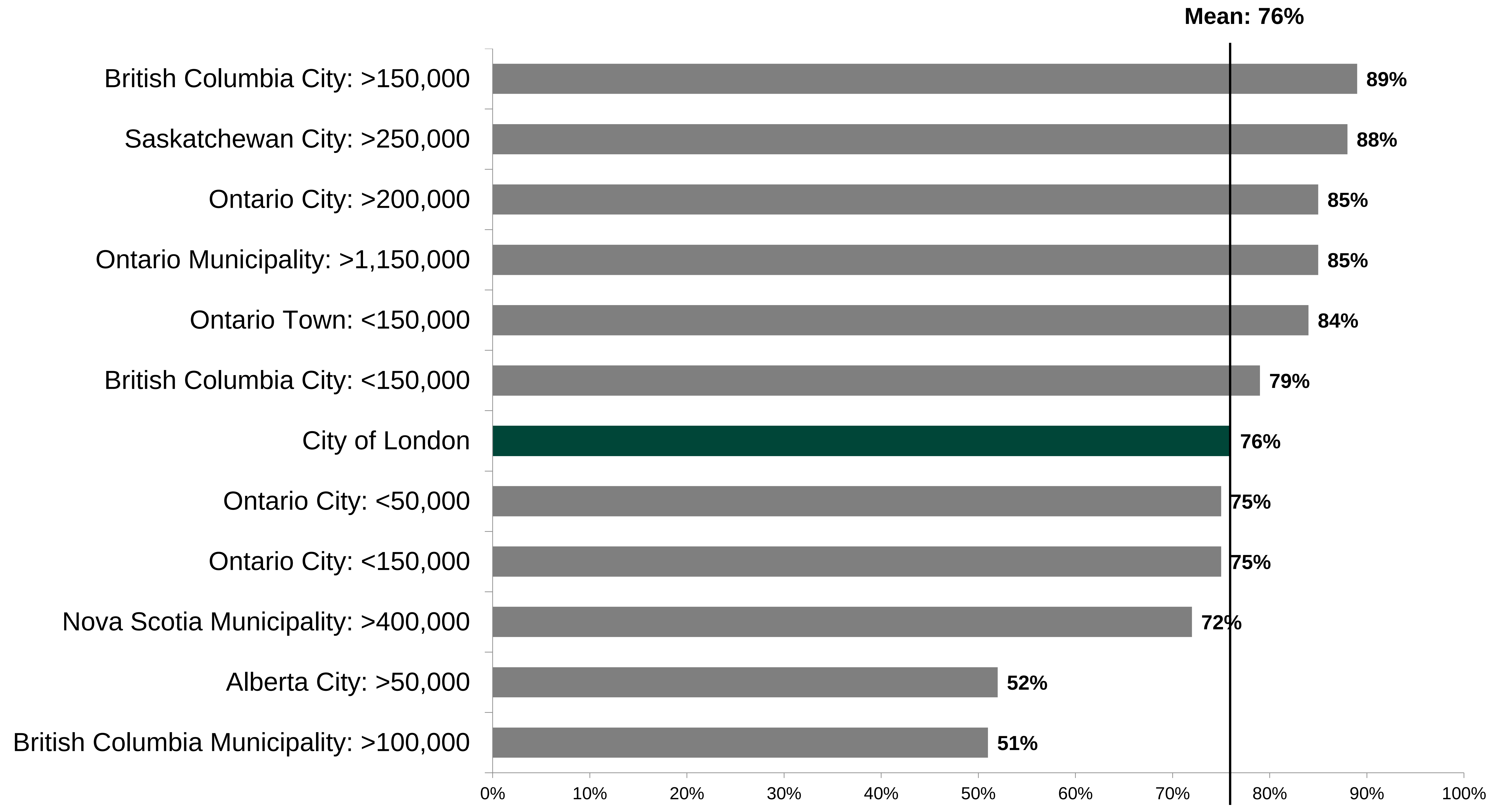
The number of residents who perceive good value of City services and programs have remained relatively steady over the past 3 years.

Around 1 in 5 (BTM2: 21%) residents say they receive poor value of City services for their taxes.

Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall, you get a very good, good, poor, or very poor value for your tax dollars?
Framework: All respondents; **Sample Size**: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500); 2013 (n=501).

Value for Tax Dollars - Benchmarks

76% of City of London residents say they receive overall a good value for their tax dollars – which is exactly the average score of other Canadian municipalities.



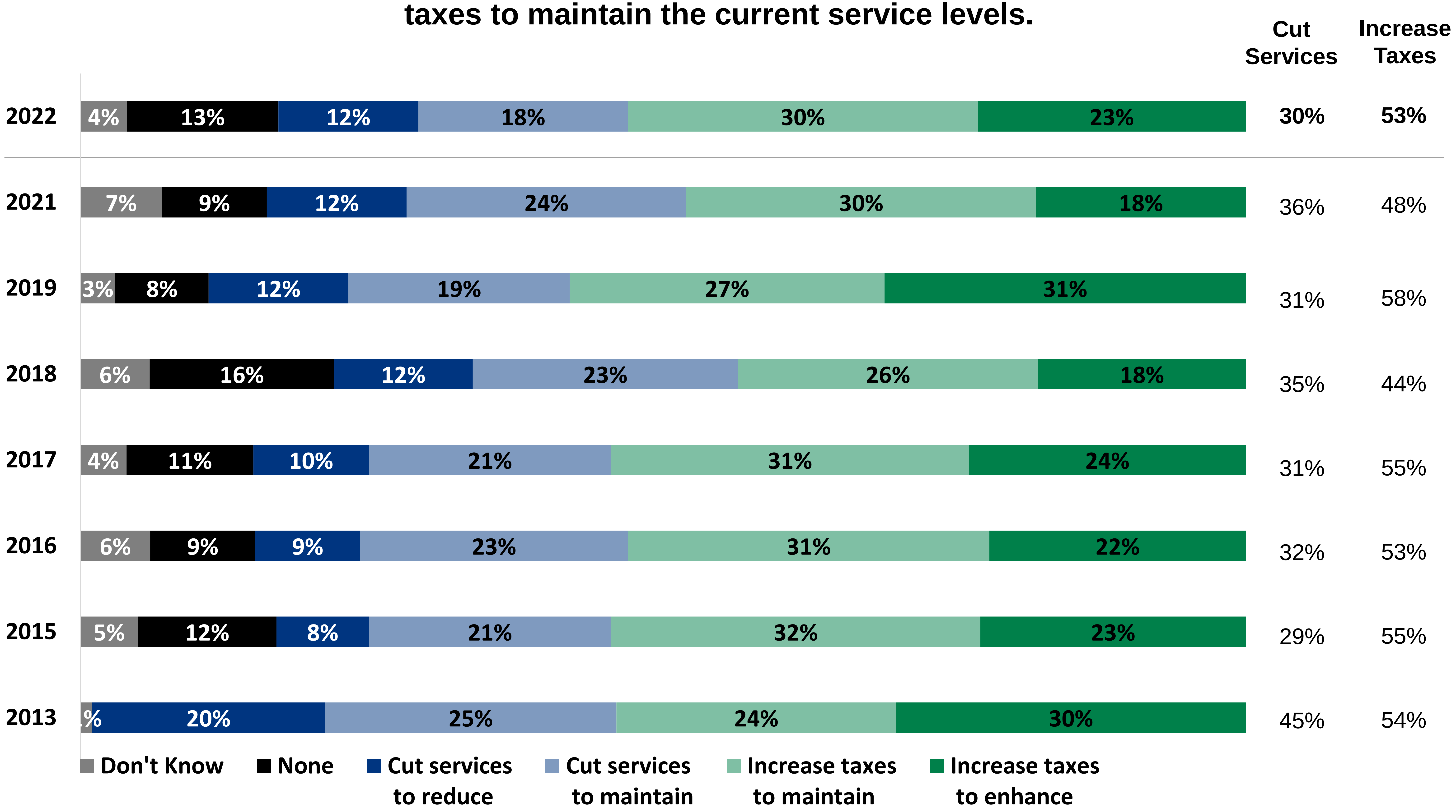
When compared with other municipalities, the City of London is on par with the average rating of value of City services for tax dollars.

*This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2020-2021. Comparisons for this question include 11 municipalities across Canada, with populations ranging from ~20,000 to ~1,150,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

*Municipalities with a population of 100,000 to 500,000 in Southern Ontario have been included in the analysis.
*The 'Don't Know' was excluded from analysis to make it comparable with other municipalities.
Q6. Thinking about all the programs and services you receive from the City of London, would you say that overall you get a very good, good, poor, or very poor value for your tax dollars?
Framework: All respondents; **Sample Size**: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500); 2013 (n=501).

Balance of Taxation and Services

More residents would prefer for the City to increase taxes (53%) than cut services (30%) to help the city balance taxation and service delivery levels. 3 in 10 (30%) would specifically prefer to increase taxes to maintain the current service levels.



Around half (53%) of residents would rather taxes be increased to help balance taxation and services in the city. Specifically, about one-quarter (23%) would want to increase taxes to enhance services, while 3 in 10 (30%) would want it to maintain service levels.

Another 3 in 10 (30%) residents would prefer to cut services, with 1 in 5 (18%) saying it to maintain tax levels, and 1 in 10 (12%) saying it to reduce taxes.

Compared to 2021, there has been an increase of residents who prefer to increase taxes. This is driven by an increase of those who prefer to increase taxes to enhance services (from 18% to 23%).

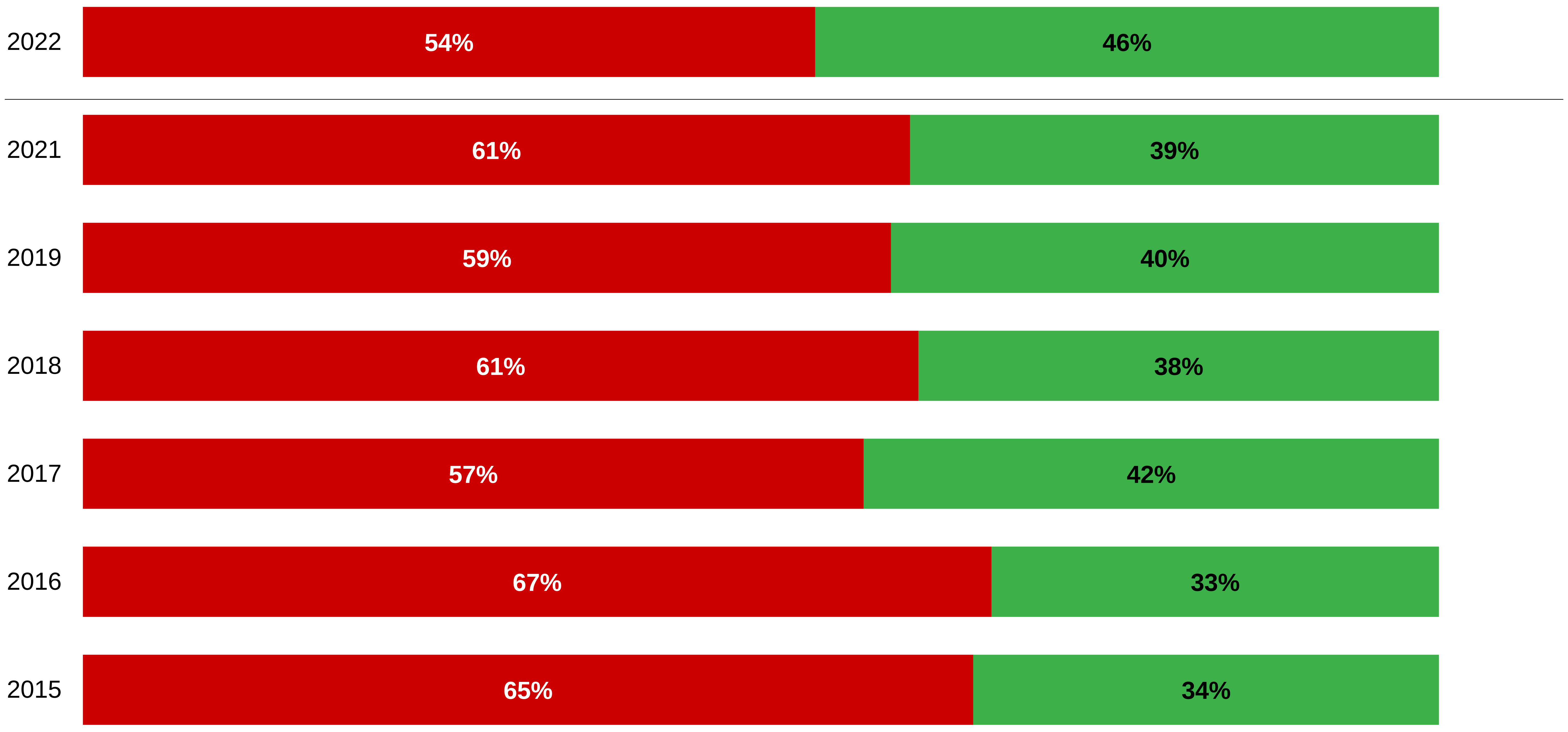
In contrast, there is a slight decrease of those who prefer to cut services instead, especially those who want it to maintain the current tax level (from 24% to 18%).

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 of London to pursue?
Framework: All respondents; **Sample Size**: 2022 (n=500); 2021 (n=508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500); 2013 (n=501).

Experience with City Staff

Contact with City in Last 12 Months

Nearly half (46%) have personally contacted or dealt with the City in the last 12 months.



Those earning more than $100,000 (64%) contact the City more than those earning less than $50,000 (36%) or those who earn $50,000 to $100,000 (48%).

Residents who have children (59%) are also more likely to contact the City than those who don't (44%).

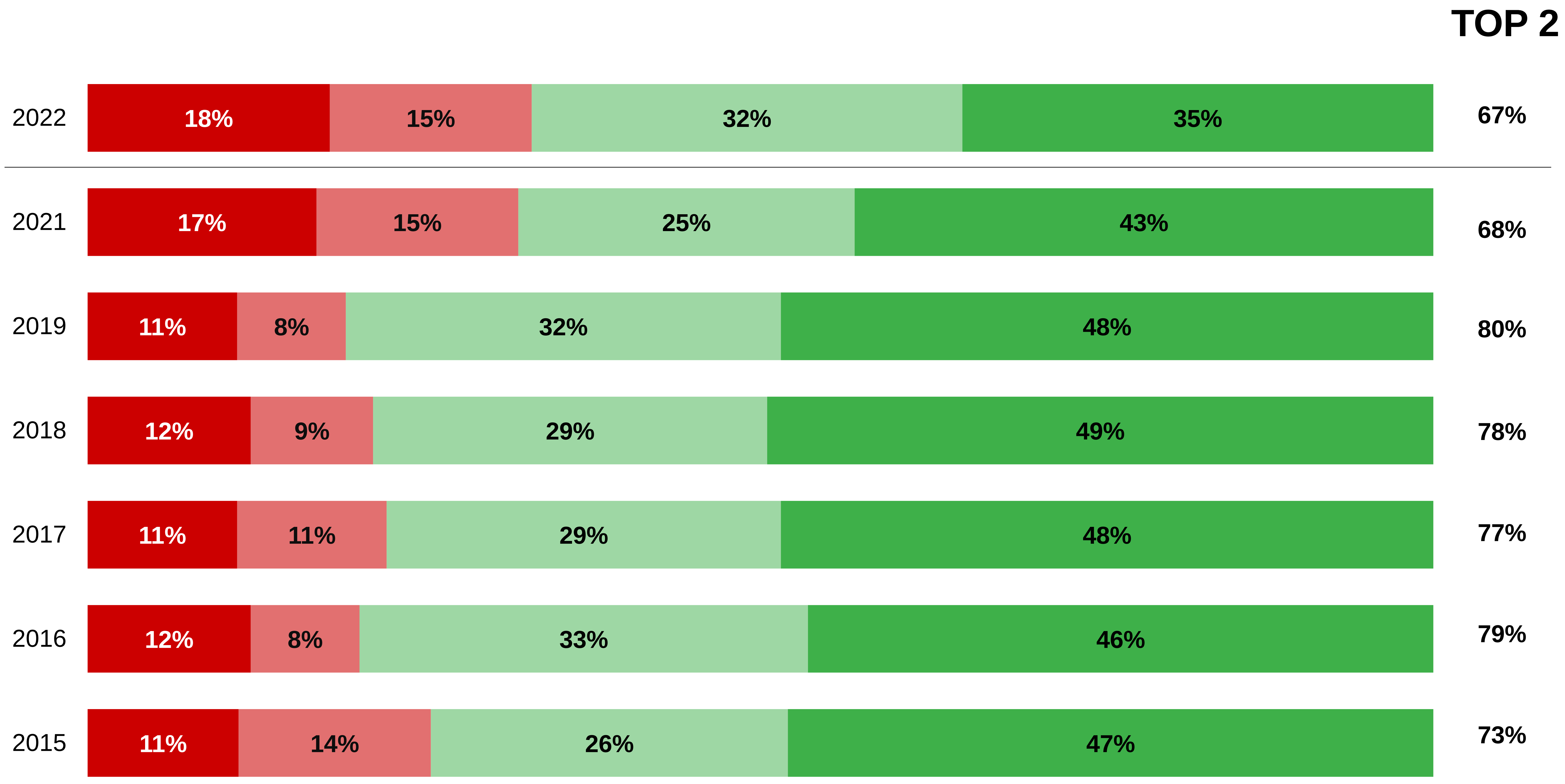
Residents who don't think that London is a welcoming community (63%) are more likely to contact the City than those who do (42%).

Overall, 2022 has the highest level of residents reaching out to the City compared to all other years.

Q8. In the last 12 months, have you personally contacted or dealt with the City of London or one of its employees?
Framework: All respondents;
Sample Size: 2022 (n=500); 2021 (n= 508); 2019 (n=500); 2018 (n=500); 2017 (n=500); 2016 (n=500); 2015 (n=500); 2013 (n=501).

Overall Satisfaction with City Staff

About two-thirds (TOP2: 67%) of residents who contacted the City were satisfied with the overall service they received.



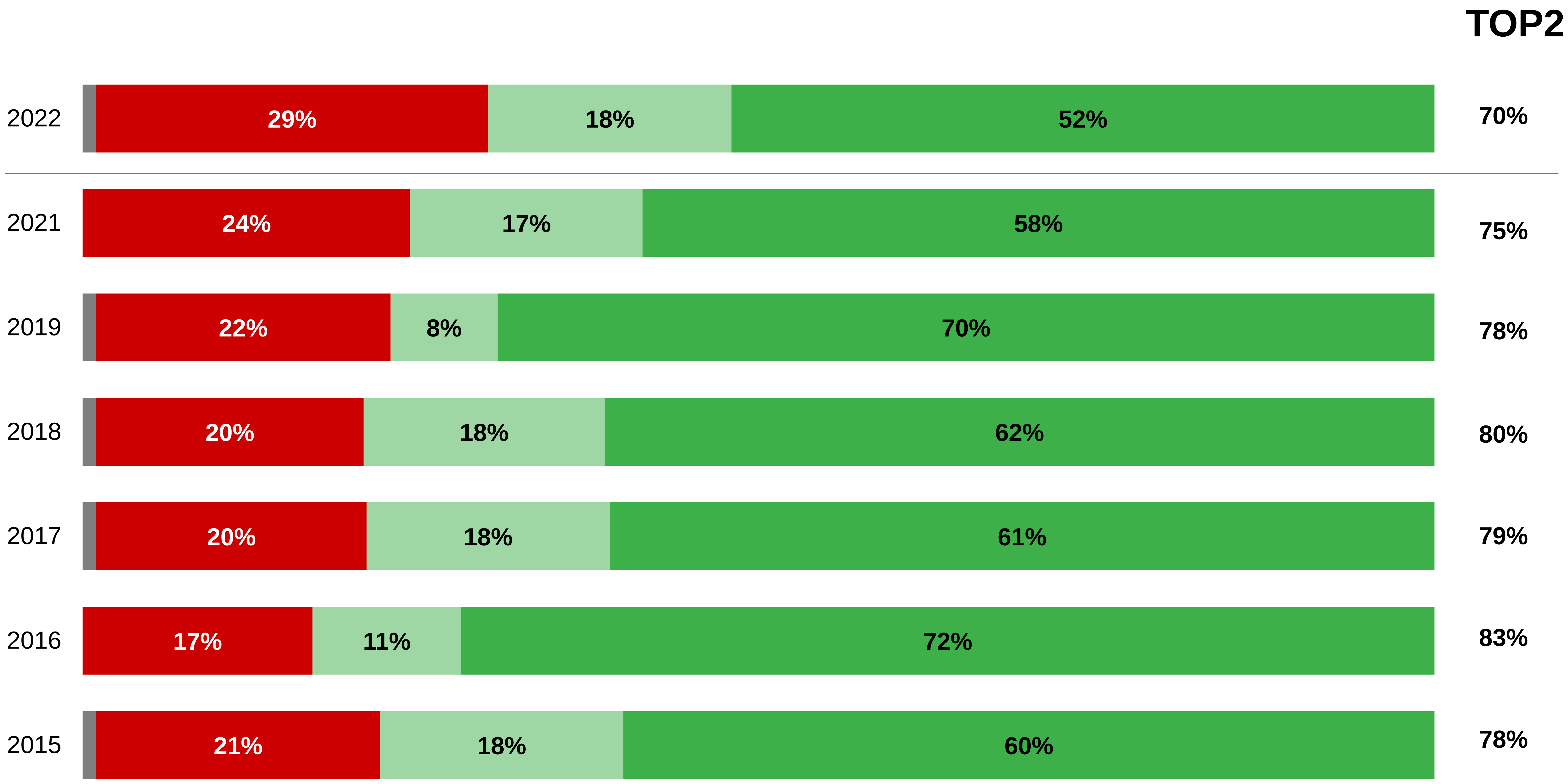
Those earning more than $100,000 (64%) contact the City more than those earning less than $50,000 (36%).

Overall, satisfaction with interaction with the City has remained steady since the last year, but is also at the lowest level compared to previous years.

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…?
Framework: Contacted the city (Yes to Q8); **Sample Size**: 2022 (n=222); 2021 (n=200); 2019 (n=199); 2018 (n=192); 2017 (n=196); 2016 (n=166); 2015 (n=172)

Received Needed Service or Support

Around 3 in 5 (58%) who contacted the City received all of the service or support they needed.



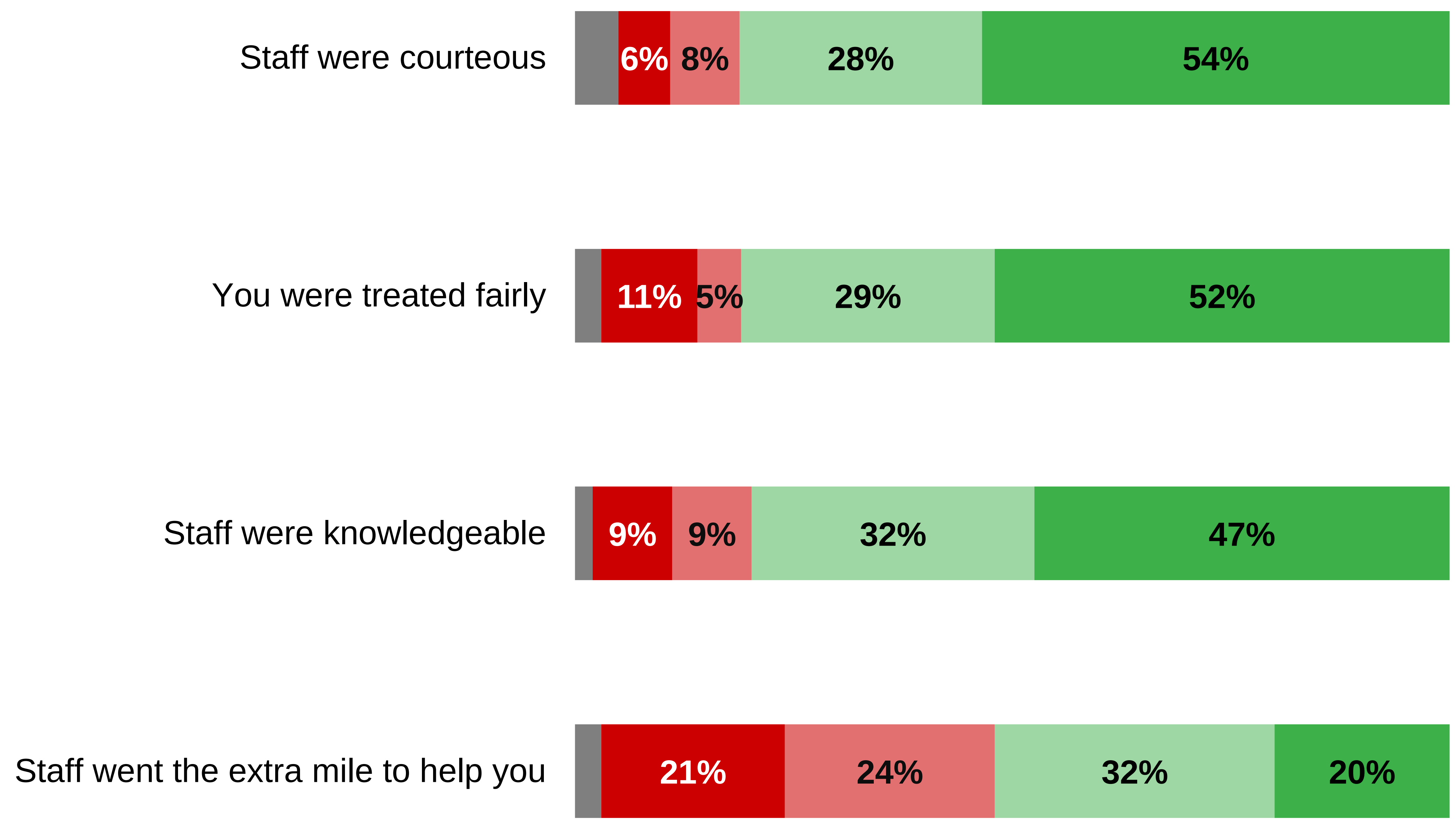
Of those who interacted with the City, 1 in 2 (52%) say they received all of the service or support they needed, while around 1 in 5 (18%) say they received partial support.

The proportions of residents who felt the City catered to their needs completely and partially has decreased from the previous year, and is the lowest it has been compared to previous years.

Q10. In the end, did you receive the service or support you needed?
Framework: Contacted the city (Yes to Q8);
Sample Size: 2022 (n=222); 2021 (n=200); 2019 (n=199); 2018 (n=192); 2017 (n=196); 2016 (n=166); 2015 (n=172).

Satisfaction of Service Experience

Of the residents who contacted the City, around 8 in 10 (TOP2: 81%) thought the staff were courteous, they were treated fairly (TOP2: 81%) and that staff were knowledgeable (TOP2: 79%).



TOP 2

	2022	2021	2019	2018	2017	2016	2015
Staff were courteous	**81%**	87%	92%	90%	91%	87%	90%
You were treated fairly	**81%**	83%	86%	83%	85%	86%	83%
Staff were knowledgeable	**79%**	80%	83%	82%	86%	84%	86%
Staff went the extra mile to help you	**52%**	55%	69%	67%	62%	64%	64%

8 in 10 residents who had contact with the City thought the staff were courteous (TOP2: 81%), that they were treated fairly (TOP2: 81%), and that staff were knowledgeable (TOP2: 79%).

About half (TOP2: 52%) say staff went the extra mile to help them.

The proportion of residents who say staff were courteous has decreased over time.

Residents who have a disability are less likely to think that they were treated fairly (TOP2: 60%) compared to those who don't (TOP2: 85%).

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…?
Framework: Contacted the city (Yes to Q8); **Sample Size**: 2022 (n=222); 2021 (n=200); 2019 (n=199); 2018 (n=192); 2017 (n=196); 2016 (n=166); 2015 (n=172).

Welcoming & Belonging

Welcoming & Belonging

8 in 10 residents believe that London is a welcoming community (TOP2: 81%) and that they have a strong sense of belonging to the city (TOP2: 79%).

TOP 2

	2022	2021	2019
The City of London is a welcoming community	**81%**	85%	90%
I have a strong sense of belonging to the City of London	**79%**	82%	88%

Residents 55 and older (41%) are more likely to strongly agree that they had a strong sense of belonging in London compared to residents aged 18 to 34 (35%) and aged 35 to 54 (30%).

Similarly, residents 55 and older (39%) are more likely to strongly agree that London is a welcoming community compared to residents aged 35 to 54 (26%).

The sense of belonging and welcoming in the city this year has remained similar to the previous year.

(Previously Q3c). W1. Please rate the extent to which you agree or disagree with the following statements:
Framework: All respondents;
Sample Size: 2022 (n=500); 2021 (n= 508); 2019 (n=500).

Demographics

Demographics

Gender	Forum Survey (2022)	StatsCan Census (2021)
Male	47%	49%
Female	50%	51%
Transgender	0%	N.A.
Gender non-conforming	0%	N.A.
Not listed / Prefer not to respond	3%	N.A.
Age		
18-34	31%	32%
35-54	30%	30%
55 and over	37%	38%
Prefer not to respond	2%	N.A.
Education Level (highest completed)		**StatsCan Census (2016)**
Less than High School	4%	16%
High School/Equivalent	14%	28%
College/Technical School	32%	29%
University/Postgraduate	47%	27%
Identify as a Person with a Disability		**StatsCan Study (2017)**
Yes	16%	27%
No	79%	73%
Prefer not to respond	4%	N.A.

Children <18 Living at Home	Forum Survey (2022)	StatsCan Census (2021)
Yes	23%	30%
No	73%	70%
Prefer not to respond	4%	N.A.
Household Income		
Less than $25,000	12%	29%
$25,000 to $49,999	14%	33%
$50,000 to $74,999	18%	28%
$75,000 to $99,999	11%	
$100,000 to $149,999	11%	6%
$150,000 or more	11%	3%
Prefer not to respond	16%	N.A.
Race/Ethnicity		
White	72%	78%
East/Southeast Asian	9%	3%
Indigenous	2%	1%
Black	4%	4%
South Asian	3%	7%
Middle Eastern	2%	5%
Latino	3%	3%
Other / Prefer not to respond	9%	N.A.

Note: Gender and age percentages represent residents 18 years of age and older. Education, ethnicity, income and disability percentages represent residents 15 years of age and older. 'Children <18 living at home' percentages represents proportions of households.

StatsCan Sources: Statistics Canada. Census Profile, 2021 Census; and Canadian Survey on Disability (2017).