2002
State of the Community

Residential Survey Findings

Prepared for:
Corporate Strategy & Policy Analysis
Section
Office of the CAO
The City of Greater Sudbury

By:
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January 2002

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Objective

- The following represents the results of a public opinion survey conducted for The City of Greater Sudbury.
- This objective of this survey was to gauge the opinions of residents of The City of Greater Sudbury on a series of issues related to life in community and about services.

Methodology and Statistics

Project Team

- Carlos Salazar, Manager of Corporate Strategy & Policy, City of Greater Sudbury
- Paul Seccaspina, Oraclepoll Research Ltd.

Study Sample

- A total of 1,200 respondents, 18 years of age and older, were interviewed in the survey. The sample was stratified with 200 respondents being randomly selected from each of the City's six Wards.
- The survey screened for the person at the contact residence who was responsible for making buying/payment decisions and other decisions related to areas such as their utility or municipal tax bills. In addition, the study sample was drawn using a modified method of "Random Digit Dialing" (Mitofsky-Waksberg).
- A total of 1,200 residents of the City of Greater Sudbury, 18 years of age and older, were contacted in this survey. Interviews were conducted between November 15 and November 23, 2001.

Survey Method

- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. No pre-imposed demographic quotas were set, as the survey method ensured a representative sample of the general population of the City of Greater Sudbury. Interviews were conducted in English or French, as the respondent preferred.
- Oraclepoll Research adheres to and exceeds the strict standards of practice as outlined by the Professional Marketing Research Society (PMRS) and the Canadian Survey Research Council (CSRC).
- A total of 30% of all interviews were monitored and 100% were supervised by the management of Oraclepoll Research.

Logistics

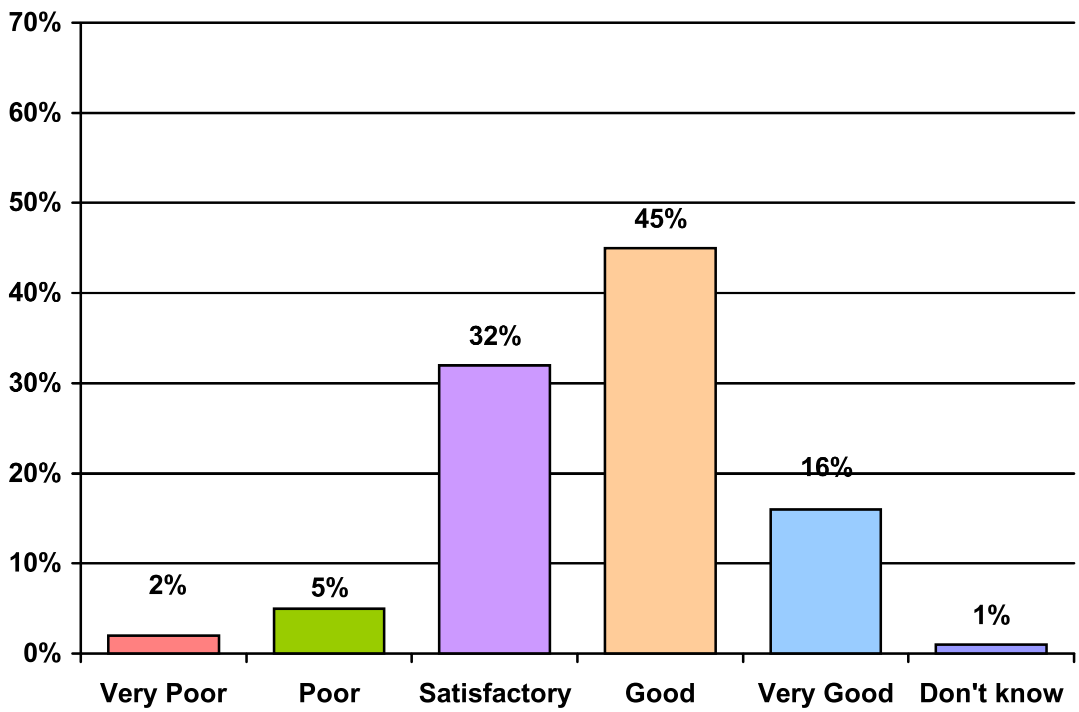
- The survey was conducted between November 15 and November 23, 2001.
- Initial calls were made from 5:30 p.m. to 9:00 p.m. with call-backs of no-answers and busy numbers made on a (staggered) daily rotating basis up to 5 times (from 10:00 a.m. to 9:00 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.
- While data collection for the 1999 to 2001 surveys took place in January of each year, the data collection for the 2002 survey was undertaken in November of 2002 in order to meet the new budget deliberation requirements of the Council of the new City of Greater Sudbury.

Confidence

- The most conservative margin of error for a survey of this nature is +/- 2.8%, 19/20 times.

Our Community's Future

Quality of life



A total of 61% of respondents rated the overall quality of life in the community as positive and only 7% rated it as negative. However, almost one-third of respondents (32%) provided a neutral or satisfactory rating. Results are slightly better than 2001 when 58% of respondents rated the overall quality of life in the community as positive as well as 2000 (60%) and 1999 (58%). Higher income earners in the $75,000 and over income cohort were less positive (59%), than those in the under $75,000 (66%) and under $50,000 (63%) income groups.

While combined good and very good scores were consistent across age groups, younger residents (18-34) were less likely to rate the quality of life as very good (8%), compared to 35-54 year olds (13%) and those over the age of 55 (25%).

Likes and dislikes about living in the City

Respondents were asked in an open-ended format what they liked most about living in the City and what they least liked.

What people like most about living in the City

1999		2000		2001		2002	
Size / Nice sized area	18%	Outdoors / Outdoor activities / Nature	20%	Outdoors / Outdoor activities / Nature	21%	Outdoors / Outdoor activities / Nature	16%
Outdoor activities / Nature	14%	Friendly people / The People	16%	Friendly people / The People	18%	Friendly people / The People	15%
The people	10%	Size of community	12%	Size of community	9%	Size of community	12%
Close to / Access to everything	9%	Born and raised here	5%	Born and raised here	6%	Close to / Access to everything	8%
Born and raised here	6%	Quiet / Peaceful	5%	Close to / Access to everything	5%	Family / friends	5%
Family / Friends	5%	Close to / Access to everything	5%	Seasons / Climate / Weather	5%	Born and raised here	5%
Low crime rate	5%	Seasons / Climate / Weather	4%	Quiet / Peaceful	5%	Quiet / Peaceful	5%

(Excluding responses of Don't Know)

Residents continue to most the City because of its natural setting, as the single most cited issue as in the previous two survey periods continues to be the outdoors/outdoor activities/nature (16%). This continues to be followed by the people of the area (15%) and the size of the community (12%).

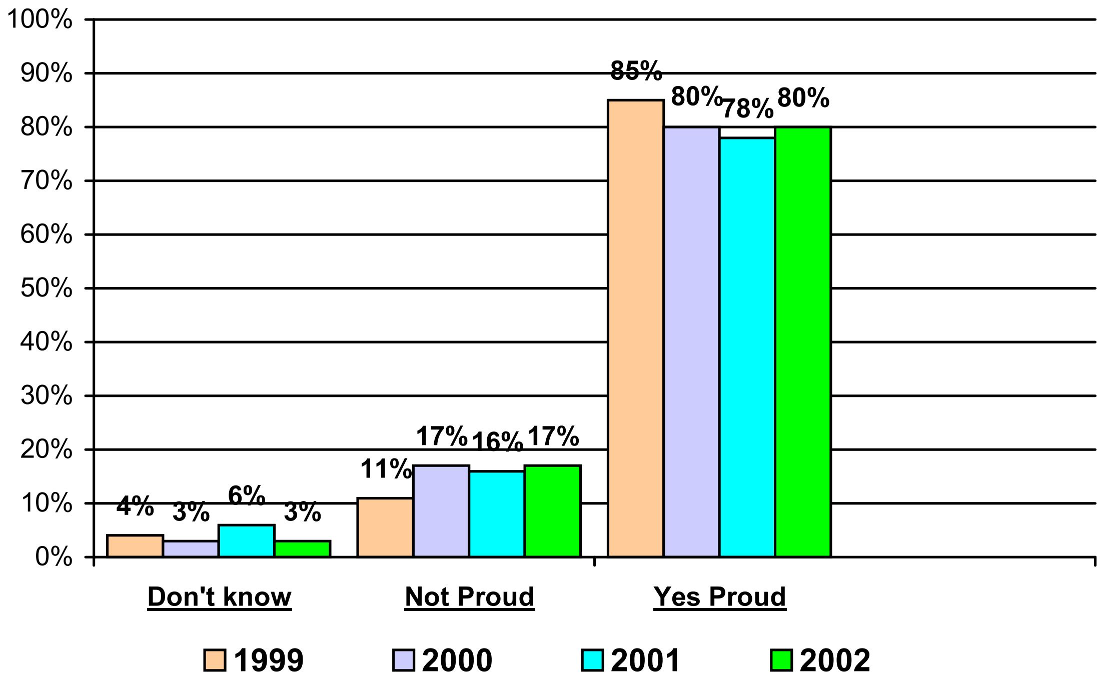
What people like least about living in the City							
1999		**2000**		**2001**		**2002**	
Weather	23%	Weather	15%	Weather	15%	Weather	9%
Roads / Transportation	11%	Roads / Transportation	14%	Roads / Transportation	13%	Roads / transportation	9%
No jobs / Unemployment	10%	No jobs / Unemployment	10%	Pollution	11%	Pollution	7%
Everything	9%	Downtown problems	6%	No jobs / Unemployment	8%	No jobs / Unemployment	5%
Pollution	7%	Taxes	5%	Taxes	4%	Taxes	4%
Lack of services	5%	Lack of things to do	5%	Transit	4%	Appearance	4%

(Excluding responses of Don't Know)

Findings from the past four survey periods reveal that Sudburians continue to least like the weather (9%) in the community, followed by roads and transportation (9%). Pollution was an issue cited by 7% of respondents, unemployment by 5% and 4% cited each of the areas of taxes and appearance of the City.

It should be noted that 9% of respondents stated that they did not know what they least liked about living in the City and 11% disliked nothing.

Sense of pride in the Community



City residents continue to have a strong **sense of pride in their community** as in the previous three survey periods. More females (86%), compared to males (75%) felt that there was a sense of pride in the City. As well, there were lower findings among higher income earners in the over $75,000 income group (77%) and residents of Ward 3 (73%).

Most important issues facing the Community

Respondents were asked what they felt were the most important issues facing the community.

Most Important Top of Mind Issues

1999		2000		2001		2002	
Jobs / Employment / Unemployment	44%	One tier / Amalgamation / Restructuring	25%	Taxes	16%	Jobs / Employment / Unemployment	15%
Roads	11%	Jobs / Employment / Unemployment	24%	Health care	16%	Roads	11%
Taxes	10%	Health care	10%	Jobs / Employment / Unemployment	16%	Taxes	10%
One tier / Amalgamation / Restructuring	8%	Taxes	6%	Roads	9%	Health care	9%
Economic diversification	6%	Service levels	6%	Equal service across CGS	5%	Water	8%
Service levels	2%	Economic diversification	5%	Water quality	3%	Economy	7%

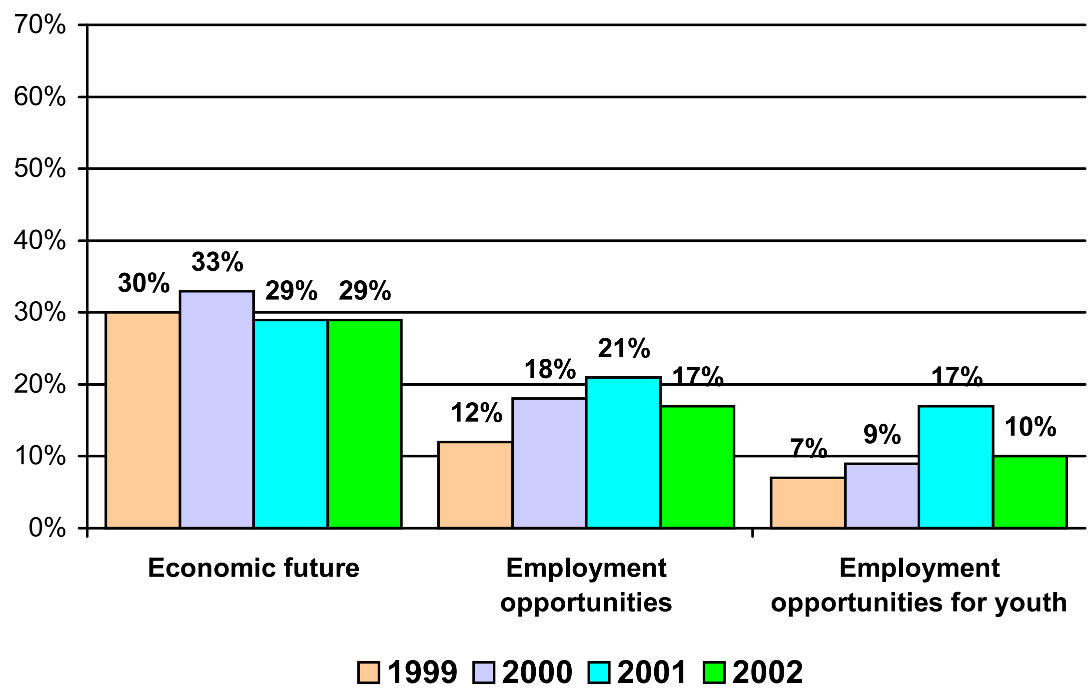
(Excluding responses of don't know)

As with businesses in the City of Greater Sudbury, residents of the community also expressed greater concern in 2002 with economic related issues and less concern with areas like taxes and health care. For example, the issue of unemployment, jobs and job creation (15%) once again became the **most cited single important top of mind issue** among residents of the community, while an additional 7% cited the economy. Despite the fact that the economy is now a greater concern than in the previous year, it is still less of a concern than it was in 1999 when 44% named employment issues as their main concern.

Roads were of concern to 11% of respondents, 10% cited municipal taxes, 9% health care and water quality was stated by 8% of those interviewed, up from 3% in the previous survey.

Confidence areas

Respondents were asked to agree or disagree with a series of statements related to the economic confidence of the community.



Confidence statements (total agree)	*1999*	*2000*	*2001*	*2002*
I am confident about the economic future of our community	30%	33%	29%	29%
I feel that there are employment opportunities in the community	12%	18%	21%	17%
I feel that there is employment for young people in the community	7%	9%	17%	10%

The **confidence indicator** related the economic future of the economy continues to be rated low but it has also remained relatively stable since 1999. However, after two years of positive increases among in public opinion with respect to providing **employment opportunities** and **employment opportunities for youth**, there is now a downward trend in both categories. The most significant drop was in the area of youth employment opportunities (-7%).

While only 49% of respondents were of the opinion that the **community is changing** for the better, this is similar to 2001 when 50% also agreed the community is changing for the better. Residents of Ward 5 were most optimistic (62%), while Ward 3 respondents were least optimistic (40%). In addition, 32% of respondents were of the belief there was no change, only 14% felt it is changing for the worse and 5% did not know or had no opinion.

Job creation

Respondents were asked what they felt could be done **to create jobs** in the local economy.

What Can be Done to Create Jobs in the Local Economy

1999		2000		2001		2002	
More industry / business	40%	More industry / business	35%	More industry / business	27%	More industry / business	32%
Diversify economy	13%	Diversify economy	10%	Support small business	8%	Diversify economy	9%
Tourism	10%	High technology	7%	Diversify economy	6%	Tax breaks / Incentives	8%
Tax breaks / Incentives	6%	Education	7%	Education / Training	6%	Government programs	6%
Shopping	4%	Tax breaks / Incentives	7%	Tax breaks / Incentives	6%	Youth retention	6%
Change in government / leadership	4%	Support small business	5%	Medical school	6%	Education	3%

Excluding responses of Don't Know)

Among those respondents that had an opinion, almost one-third 32% responded bring in more industry / business, 9% stated diversify the economy, 8% provide tax breaks or incentives, 6% have more government programs and 6% develop youth retention strategies. A high 35% of those surveyed answered that they did not know what could be done.

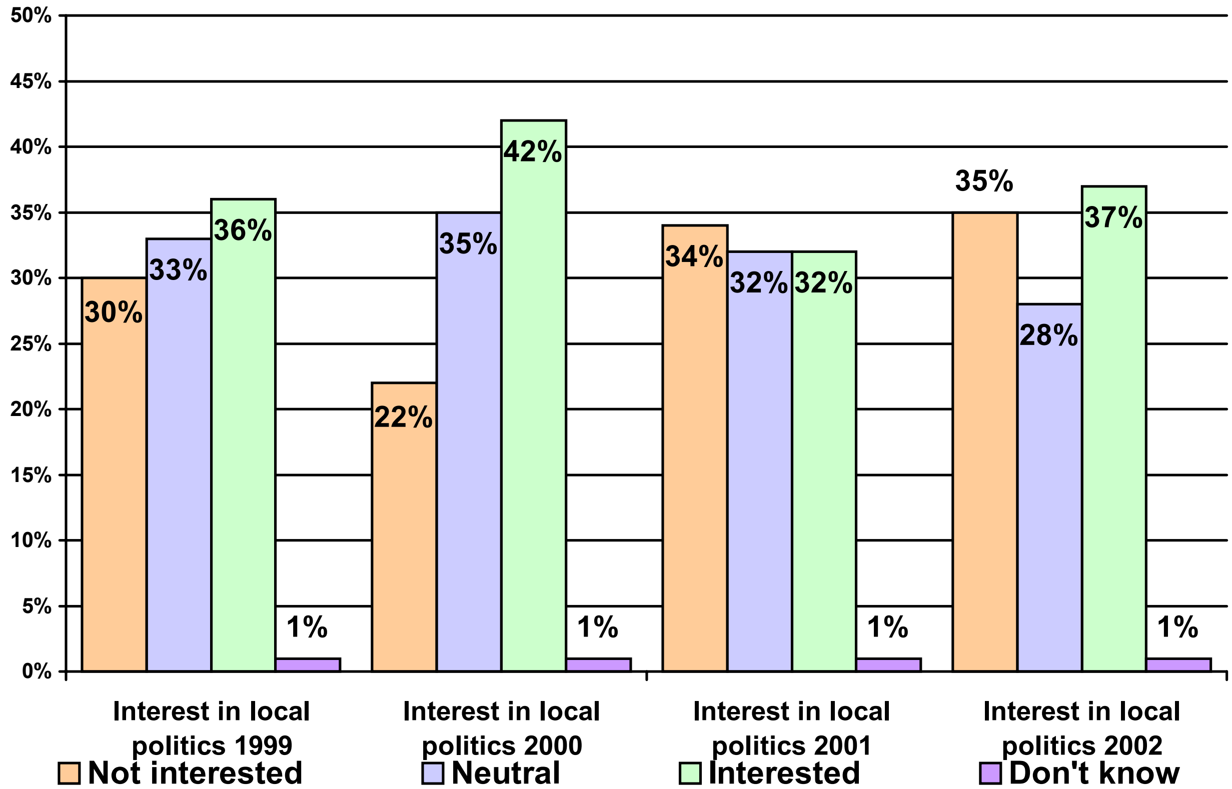
Healthy Community

Respondents were read the following six statements after which they were asked to agree or disagree with them

Total Agree	**1999**	**2000**	**2001**	**2002**
The community provides opportunities for healthy living	Na	Na	71%	68%
The community provides quality post-secondary education	64%	62%	63%	63%
The community offers good cultural institutions	Na	Na	53%	48%
The community has a strong and viable arts and cultural community	46%	44%	42%	43%
The community provides seniors in our areas with quality care	45%	32%	40%	30%
The community provides quality health care services to residents	47%	36%	34%	29%

There were ratings drops in four of the six areas related to the "healthy community." The most significant decreases occurred in the are of providing seniors with quality care (-10%), followed by quality health care for all residents (-5%) and for providing good cultural institutions (-5%).

A total of 56% of those surveyed stated that they had **given their time to a volunteer,** community, religious or charity organization, up from 2001 (52%). Time was most given to community organizations (55%), religious groups (30%) and alumni/school associations (15%).



Overall there remains a low level of interest in politics at the local government level and alienation from the process, but slightly higher than the previous survey period. However, there was more interest in local politics in 2002 compared to 2001 when restructuring appears to have alienated some residents from the political process.

As well, 50% of those surveyed stated that they want to have information about municipal issues and an opportunity to be heard compared to a lower 40% who stated the same in 2001.

A total of 71% of respondents stated that they would vote in future elections using an alternative method of voting compared to a lower 68% in 2001.

While 54% of residents felt that City Hall is providing them with enough information and opportunities to have their voice heard and to be involved in the decision making process, up from 49% in 2001, more than a third (34%) still do not feel they are provided this opportunity.

Interest in municipal issues

Residential respondents were asked to state which of the following statements best described their interest in municipal issues.

	1999	2000	2001	2002
I want information and an opportunity to be heard	39%	47%	40%	50%
I only want information	44%	32%	41%	31%
I want to be involved in making recommendations	9%	12%	11%	14%
I prefer to be left alone	6%	10%	7%	6%
Don't know	2%	-	1%	-

As stated, residents of the City of Greater Sudbury appear to be taking a keener interest in municipal issues than in the previous survey period. This is evidence by the significant increase of the number of residents want information and an opportunity to be heard in 2002 compared to 2001 when the restructuring process may have alienated some residents.

Hi-Tech Community

The following tables highlight personal computer and Internet access.

Computer access	***1999***	***2000***	***2001***	***2002***
Home	52%	55%	66%	66%
Business	44%	50%	51%	56%

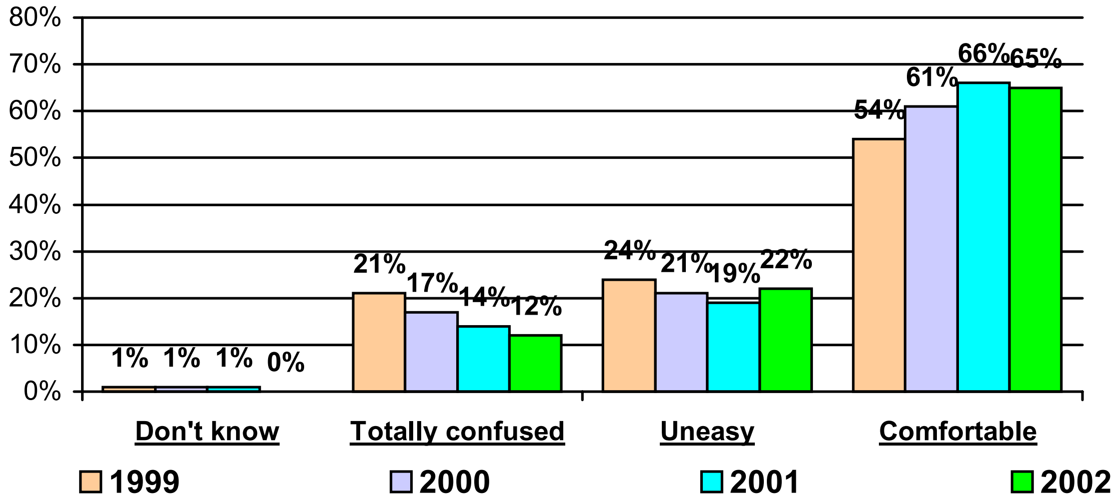
Internet access	***1999***	***2000***	***2001***	***2002***
Home	33%	55%	67%	66%
Business	25%	37%	57%	56%

In total, 66% of respondent households with a PC stated that they had **Internet access** at their residence. This represents **44% of the total population that has Internet access** at their home. Results reveal that the penetration of both PC's and Internet access has reached a plateau in the City.

Most respondents spend under 10 hours on the Internet (74%). In addition, most respondents use the Internet for either e-mail (73%) or to access information in general (85%).

Only 11% of those respondents with Internet access stated that they currently **telecommute.** However, almost six in ten (59%) of those respondents that do not currently work from home stated that they would if given the opportunity. This number is up form 2001 (52%) and 2000 (49%).

Feelings About the Digital Revolution



City residents appear to be taking comfort with the digital revolution. While a stable percentage of respondents surveyed in the 2002 period stated that they were **comfortable with the digital revolution** (65%) compared to 2001 (66%), there has been a steady drop in the percentage of the population that is totally confused about the digital revolution since 1999.

As well, a high 87% of those surveyed stated that **information technology** was important for the future of our community while only 2% did not feel that it was important.

Importance of services

Respondents were asked to rate the importance of a range of services that the City currently provides. The following table ranks each category by level of importance to respondents.

Importance of Services	1999 Priority	2000 Priority	2001 Priority	2002 Priority	2001-02 % Change
Fire protection	Na	Na	73%	95%	+22%
Public health unit services	85%	88%	71%	88%	+17%
Ambulance services	90%	96%	78%	94%	+16%
Promoting the reduction of waste (3 R's)	84%	83%	70%	86%	+16%
Water and sewer services	85%	90%	80%	85%	+15%
Developing job creation initiatives	88%	88%	77%	90%	+13%
Planning for the City's future	85%	88%	72%	85%	+13%
Maintenance of main roads	88%	94%	79%	91%	+12%
Policing	89%	95%	77%	89%	+12%
Ensuring building safety	84%	86%	71%	83%	+12%
Promoting tourism	84%	87%	71%	82%	+11%
Re-greening of the community	76%	82%	70%	81%	+11%
Libraries	Na	Na	64%	75%	+11%
Child care funding	58%	61%	53%	64%	+11%
Pioneer Manor	77%	84%	71%	81%	+10%
Economic diversification	78%	80%	72%	80%	+8%
Winter road maintenance	91%	95%	83%	91%	+8%
Public transit	Na	Na	63%	70%	+7%
Landfill sites	73%	73%	71%	75%	+4%
Recreational faculties	Na	Na	66%	69%	+3%
Providing affordable housing	69%	75%	65%	68%	+3%
Providing quality of land development	51%	56%	46%	47%	+1%
Leisure programs	Na	Na	63%	58%	-5%
Providing welfare assistance	50%	49%	63%	46%	-17%

As in previous years, of most importance were those areas related emergency services (ambulance and fire), roads and infrastructure and job creation initiatives. The strong perceived increase in emergency service importance areas may in part be a result of the aftermath of the events of September 11th.

However, residential respondents placed a higher degree of emphasis with their importance ratings in all but two areas in 2002, compared to 2001 especially in relation to fire services (+22%). The only areas that residents felt were less important related to providing welfare assistance and with respect to leisure programs.

Rating services

Respondents were then asked to rate how the City currently provides a range of services. The following table highlights the positive ratings accorded to each service in order of priority importance.

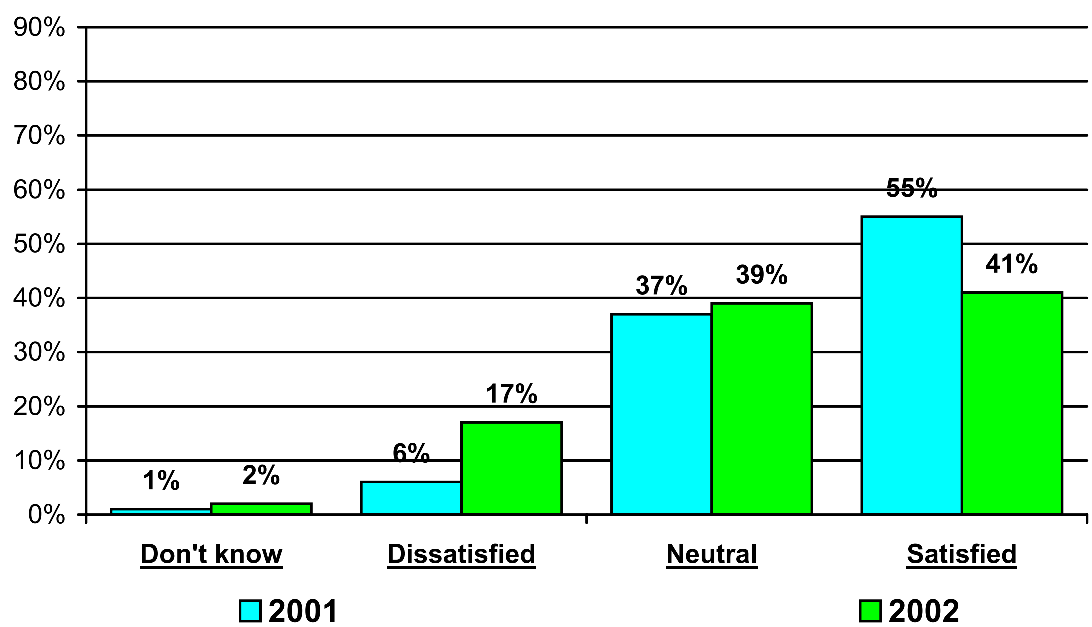
Rating Services	*1999 Positive*	*2000 Positive*	*2001 Positive*	*2002 Positive*	*2001-02 % Change*
Ambulance services	67%	66%	49%	64%	+15%
Planning for the City's future	52%	53%	32%	47%	+15%
Fire protection	Na	Na	63%	75%	+12%
Re-greening of the community	64%	67%	52%	62%	+10%
Policing	66%	61%	50%	60%	+10%
Public health unit services	58%	56%	47%	57%	+10%
Promoting the reduction of waste (3 R's)	55%	61%	41%	51%	+10%
Recreational facilities	Na	Na	51%	60%	+9%
Public Transit	Na	Na	46%	55%	+9%
Landfill sites	40%	42%	30%	39%	+9%
Libraries	Na	Na	58%	66%	+8%
Ensuring building safety	44%	50%	35%	43%	+8%
Promoting tourism	64%	66%	49%	55%	+6%
Child care funding	28%	27%	22%	28%	+6%
Economic diversification	34%	35%	27%	31%	+4%
Pioneer Manor	43%	43%	36%	39%	+3%
Leisure programs	Na	Na	47%	50%	+3%
Providing welfare assistance	44%	40%	29%	31%	+2%
Providing quality of land development	24%	37%	24%	26%	+2%
Winter road maintenance	56%	46%	40%	40%	N/C
Water and sewer services	58%	64%	45%	44%	-1%
Developing job creation initiatives	29%	32%	30%	29%	-1%
Providing affordable housing	38%	31%	34%	30%	-4%
Maintenance of main roads	36%	24%	28%	21%	-7%

There were positive increases in 2002 over the previous survey period in 19 categories and drops in only 4 as residents appear to be less cautious in their handing out of positive ratings. The most significant increases were for fire services (+15%) and planning for the City's future (+15%).

The lowest positive ratings were provided for the areas of job creation initiatives and the maintenance of main roads where the negative responses were either equal to or greater than the positive rating provided.

Satisfaction with the Range of Services Provided by the City

Residents were asked to rate the **range** of services provided by the City of Greater Sudbury.



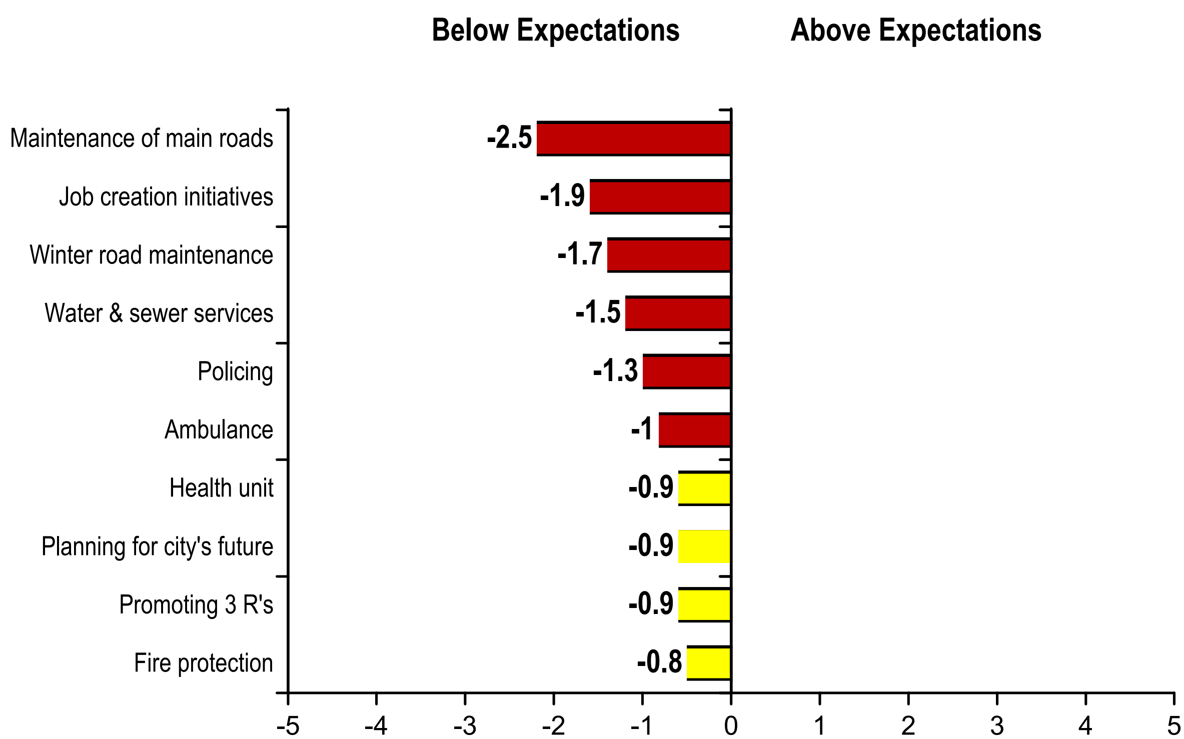
Residents of Sudbury appear to be taking a more critical view of the **range of services** provided in the community, one year into the creation of the new City.

A total of 41% of residential respondents claimed they were satisfied with the **range of services** that the City provides, 39% had a neutral/satisfactory response, 17% accorded a negative rating and 2% did not know. There was a 14% satisfaction drop over 2001 when 55% claimed that they were satisfied in this area. As well, there was a jump of 11% in those that were dissatisfied. Most dissatisfied were males (23%), those earning over $75,000 and residents of Ward 4 (27%).

As this rating reflects the perception of the range of services offered, a lower score in 2002 reveals that there still may be some uncertainty with respect to the restructuring process and fears of service losses.

Gap Analysis (Top 10 areas of importance)

The differences between the **level of importance and the level of satisfaction** are further examined via gap analysis. Here, a positive number indicates that the mean satisfaction rating is *highe*r than the mean importance rating (the attribute is exceeding expectations), and a negative number indicates that the mean satisfaction rating is *lower* than the mean importance rating (not meeting expectations). Generally, respondents are cautious with their satisfaction ratings and generous with their importance ratings, which results in most attributes falling "below expectations".



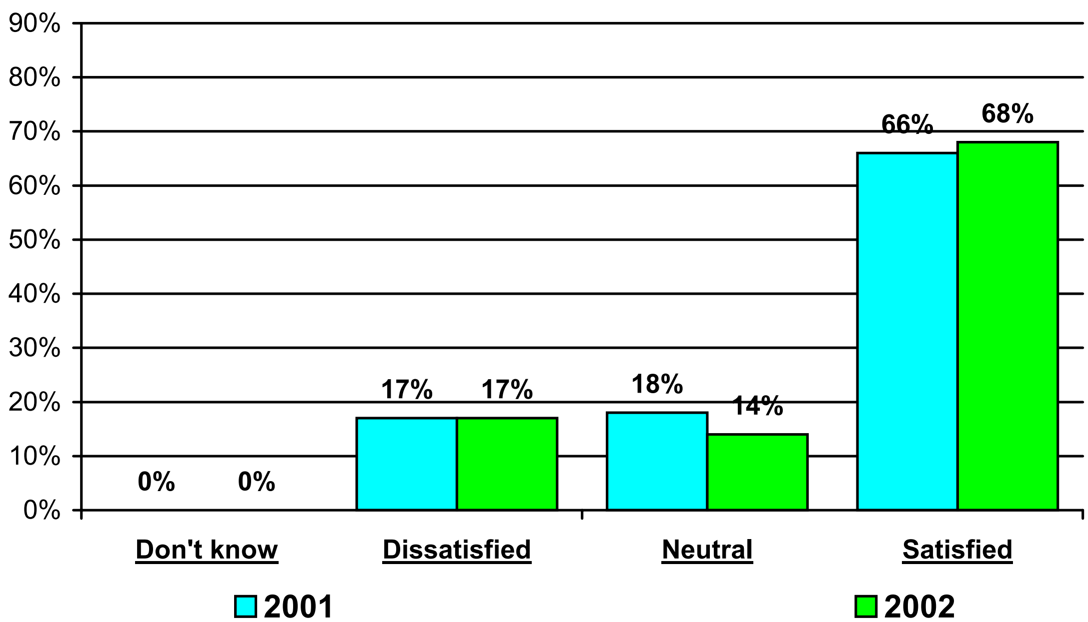
(-1% or more illustrates a major opportunity area).

The areas where satisfaction most falls below expectations relates to road maintenance, job creation initiatives, winter road maintenance, water and sewer services and policing. No areas exceeded the expectations of residents.

Contact with a Municipal Staff Member

A total of 42% of residents contacted a municipal staff member in 2001. Most of these people either asked for information (40%) or requested service or assistance (34%). Only 18% made a complaint and 4% a suggestion comment.

Residents who had contact were then asked to rate their satisfaction with this experience.



Satisfaction ratings remained consistent over the two survey periods. Those satisfied were likely to cite the fact that their needs were addressed (24%) and that service was quick (14%), while on the other hand dissatisfied customers cited long waits (12%), poor service (10%) and that issues were not resolved (8%).

Budget issues

Respondents were read and asked to agree or disagree with each of the following five statements that will be used by Council to prepare the 2002 Budget.

	Total Agree			
	1999	**2000**	**2001**	**2002**
Rather than building new facilities or roads, the City should invest in maintaining and improving existing facilities and roads	77%	78%	72%	78%
The private sector should be involved in the delivery of City services if they can be delivered more cost effectively without affecting current service levels	72%	62%	60%	64%
Where appropriate the direct users of City services should pay for the cost of providing those services	37%	38%	41%	36%
The City should maintain current levels of service and increase taxes up to 5%	29%	22%	37%	37%
The City should reduce service levels by whatever is needed in order to hold the line on taxes	27%	33%	21%	25%

Respondents most agreed that rather than building new facilities or roads; the City should invest in maintaining and improving existing facilities and roads. In addition, there is acceptance among more than more than six in ten residents over the issue of private sector service delivery.

There remains a low tolerance for any further reduction in services, taxes increases and the implementation of user fees.