

2003
State of the Community
Report



Business Survey Results

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

By:



November 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 business owners, managers and professionals from the municipality on a series of issues related to life in the community and about services.

Methodology and Statistics

Project Team

- Carlos Salazar, Manager of Corporate Strategy & Policy, City of Greater Sudbury
- Paul Seccaspina PhD, President, Oraclepoll Research Ltd.
- Bob Sinclair PhD, Vice President, Oraclepoll Research Ltd.

Methodology and Statistics

Study Sample

- A total of 100 businesses from the City of Greater Sudbury were interviewed in the survey.
- The study sample was randomly selected from an active database of businesses and professionals in the City.
- Interviewers screened for one of the following respondents: principal owner, President; VP Marketing; VP Manufacturing or VP Technology. Interviews were conducted between October 24th and November 7, 2002.

Survey Method

- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. 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 October 24th and November 7, 2002.
- . Calls were made from 8:30 a.m. to 6:00 p.m. with call-backs of no-answers and busy numbers made on a (staggered) daily rotating basis up to 5 times until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.

Confidence

- The most conservative margin of error for a survey of this nature is +/- 9.8%, 19/20 times.

Reporting Notes

- The sample size for the 2002 survey is 100, which is lower than the 300 interviews that were conducted in previous years. The reason for this reduction relates to problems associated with

the over sampling of businesses and database exhaustion. Furthermore, the current sample of 100 provides appropriate levels of statistical power to conduct advanced analyses.

Executive Summary

Our Community's Future

Most important issues facing the community

Respondents were asked from the perspective of their business, what they felt was the **most important issue** facing the community.

Significant issues - Of respondents with an opinion

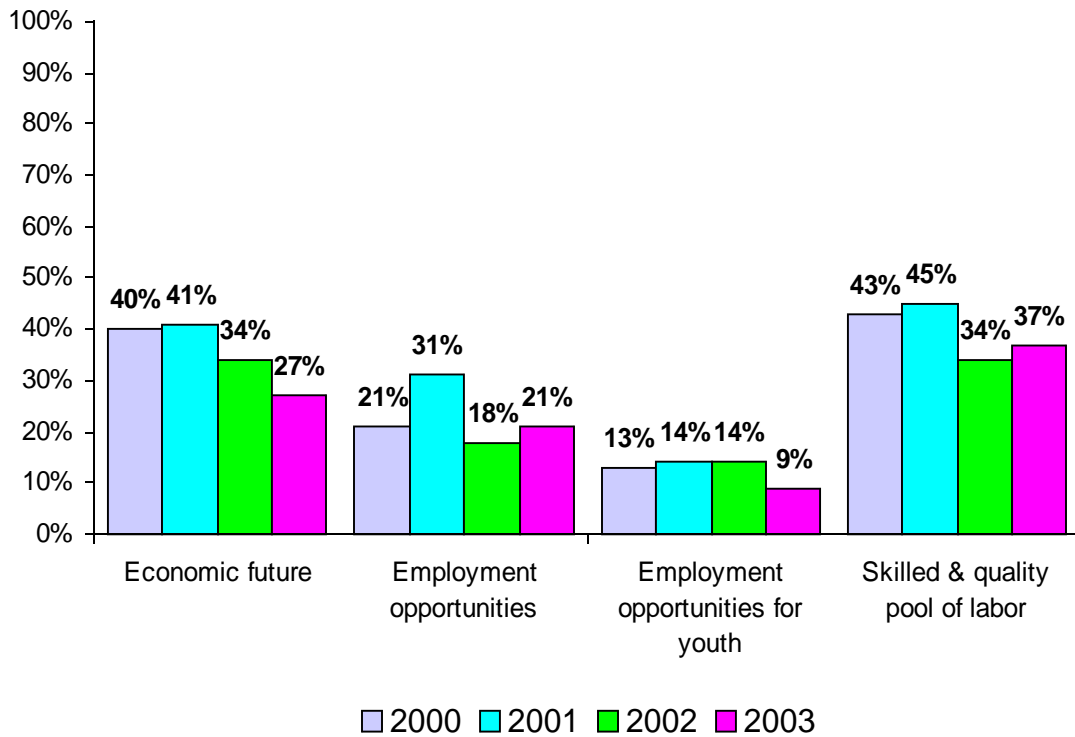
2000		2001		2002		2003	
Jobs / Unemployment	15 %	Taxes (high)	25 %	Taxes (high)	21 %	Roads	14 %
Amalgamation / Municipal restructuring	11 %	Jobs / Unemployment	13 %	Economic diversification	14 %	Jobs / Unemployment	14 %
Economic diversification	11 %	Economic diversification	10 %	Business friendly environment	12 %	Taxes	12 %
Economy	8%	Business friendly environment	8%	Jobs / Unemployment	11 %	Economic diversification	12 %
Keeping youth here	8%	Restructuring (process)	7%	Service accessibility	10 %	By-laws	12 %
Taxes (high)	7%	Service accessibility	5%	By-laws	7%	Population decline	5%

(Excluding responses of Don't Know)

In 2003, concern with issues among businesses is spread out over a varied range of areas. The issues of roads (14%) and jobs or unemployment (14%) now share top spot among businesses as being the most important issue facing the community. There is still concern over taxes, as this issue remains a top-three topic (12%), as is economic diversification (12%) and by-laws or red tape (12%). Population decline is now an issue that 5% of businesses named as being the most important.

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)	2000	2001	2002	2003
I am confident about the economic future of our community	40%	41%	34%	27%
I feel that there are employment opportunities in the community	21%	31%	18%	21%
I feel that there is employment for young people in the community	13%	14%	14%	9%
The community provides a skilled and quality pool of labor	43%	45%	34%	37%

Businesses rated the community consistently low in each of the four **confidence areas** covered reflecting continued apprehension over the economic future of the area. There were drops in the areas of confidence related to the economic future of the community (-7%) over 2002 and for there being employment for young people (-5%). However, there were slight ratings increases for the community providing skilled and quality labor (+3%) and for there being employment opportunities (+3%).

In addition, only 39% of businesses were of the opinion that the **community is changing** for the better; similar to 2002 when 39% stated the same. While 38% were of the opinion there has been no change, lower than the previous year (48%), a total of 21% now claim that things are worse as compared to only 10% in 2002.

Only 34% of businesses plan to expand their organization in the near future and 39% plan to hire addition staff.

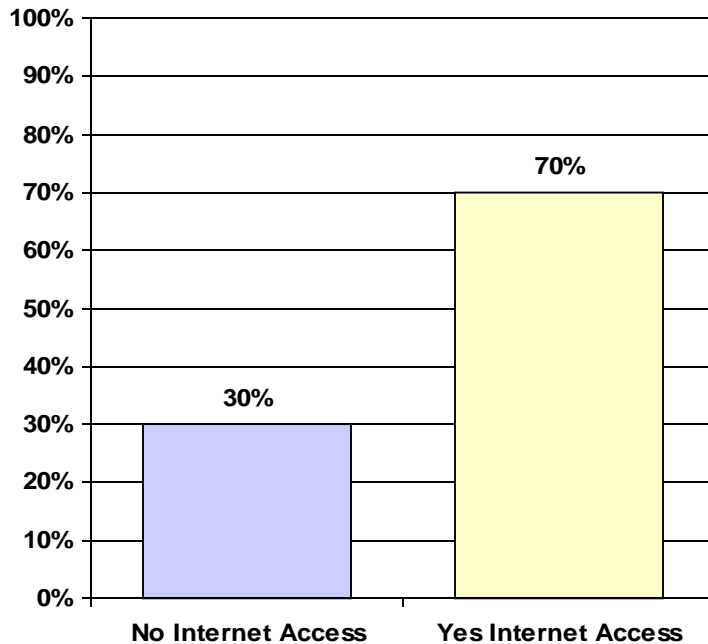
Healthy Community

A very high 91% of organizations surveyed stated that their business had given time to a volunteer, community, religious or charity organization, higher than 84% in 2002 but similar to 2001 findings (90%).

Hi - T e c h C o m m u n i t y

The following table highlights the number of **computers** at each business.

Internet Access



A total of 70% of businesses surveyed stated that they have **Internet access**, while 64% also have a website. In addition, 65% of businesses claim that their organization makes use of new technology software.

There also continues to be a high level of buy-in with respect to the importance of information technology for the future of the community (88%), as it was in 2002 (89%) and 2001 (89%).

When asked if they would like more municipal services provided on the Internet, 51% claimed that they did, similar findings as in 2002 (49%).

Municipal Services

Importance of services

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

<i>Importance of Services</i>	<i>2000 Priority</i>	<i>2001 Priorit y</i>	<i>2002 Priority</i>	<i>2003 Priority</i>	<i>2002-03 % Change</i>
Winter road maintenance	94%	85%	89%	94%	+5%
Fire protection	Na	69%	81%	92%	+11%
Maintenance of main roads	88%	83%	93%	91%	-2%
Planning for the City's future	85%	74%	70%	90%	+20%
Policing	91%	76%	75%	90%	+15%
Ambulance services	89%	77%	83%	90%	+7%
Economic diversification	87%	79%	76%	85%	+9%
Water & sewer services	83%	79%	71%	82%	+11%
Public health unit services	81%	67%	73%	81%	+8%
Developing job creation initiatives	85%	74%	83%	79%	-4%
Promoting tourism	78%	66%	80%	79%	-1%
Promoting the reduction of waste	68%	64%	72%	76%	+4%
Pioneer Manor	66%	58%	71%	73%	+2%
Ensuring building safety	65%	64%	64%	72%	+8%
Landfill sites	58%	57%	67%	69%	+2%
Public transit	Na	56%	59%	65%	+6%
Re-greening of the City	77%	56%	74%	63%	-11%
Libraries	Na	58%	72%	61%	-9%
Providing affordable housing	36%	43%	53%	59%	+6%
Providing quality of land development	56%	49%	52%	58%	+6%
Child care funding	41%	41%	52%	56%	+4%
Recreational facilities	Na	47%	59%	53%	-6%
Leisure programs	Na	42%	49%	45%	-4%
Providing welfare assistance	27%	28%	24%	40%	+16%

The issues of most importance to businesses in 2003 were related to the maintenance of main roads and the winter road maintenance of roads, similar to previous years. Emergency services including policing and fire were also of high importance, as was planning for the future of the community. The latter issue also experienced the largest priority increase (+20%) over the previous year.

<i>Importance of Services by Department</i>	<i>2000 Priority</i>	<i>2001 Priorit y</i>	<i>2002 Priority</i>	<i>2003 Priority</i>	<i>2002-03 % Change</i>
Emergency Services					
Fire protection	Na	69%	81%	92%	+11%
Ambulance services	89%	77%	83%	90%	+7%
Police Services					
Policing	91%	76%	75%	90%	+15%
Public Health					
Public health unit services	81%	67%	73%	81%	+8%
Public Works					
Winter road maintenance	94%	85%	89%	94%	+5%
Maintenance of main roads	88%	83%	93%	91%	-2%
Water & sewer services	83%	79%	71%	82%	+11%
Promoting the reduction of waste	68%	64%	72%	76%	+4%
Landfill sites	58%	57%	67%	69%	+2%
Economic Development & Planning					
Planning for the City's future	85%	74%	70%	90%	+20%
Economic diversification	87%	79%	76%	85%	+9%
Developing job creation initiatives	85%	74%	83%	79%	-4%
Promoting tourism	78%	66%	80%	79%	-1%
Ensuring building safety	65%	64%	64%	72%	+8%
Providing quality of land development	56%	49%	52%	58%	+6%
Re-greening of the City	77%	56%	74%	63%	-11%
Providing affordable housing	36%	43%	53%	59%	+6%
Citizen Services					
Libraries	Na	58%	72%	61%	-9%
Public transit	Na	56%	59%	65%	+6%
Recreational facilities	Na	47%	59%	53%	-6%
Leisure programs	Na	42%	49%	45%	-4%
Social Services					
Pioneer Manor	66%	58%	71%	73%	+2%
Child care funding	41%	41%	52%	56%	+4%
Providing welfare assistance	27%	28%	24%	40%	+16%

Rating services

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

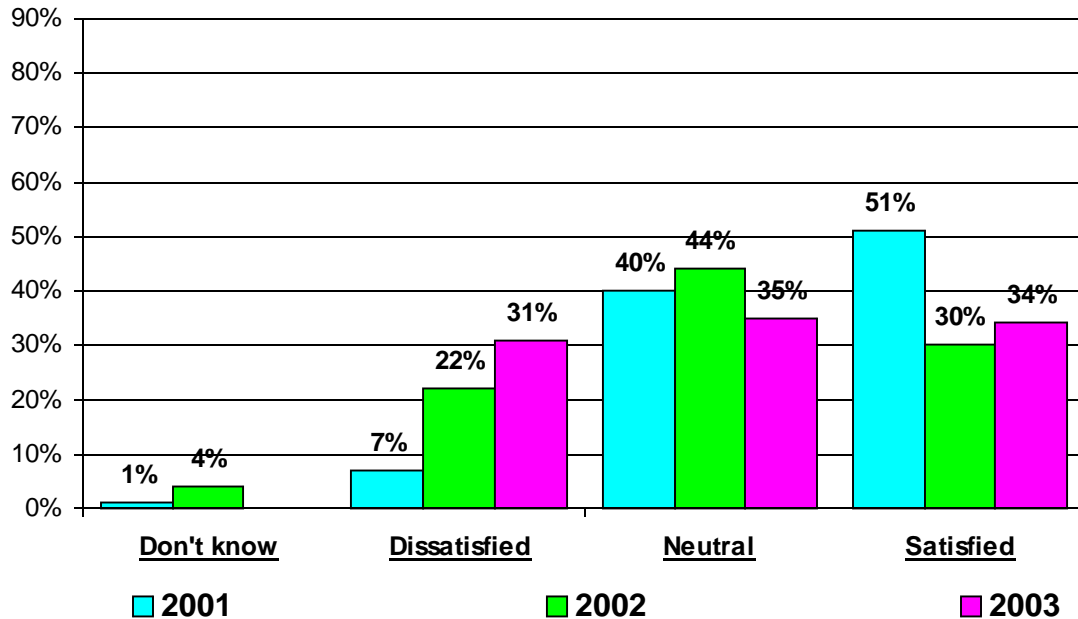
<i>Rating Services</i>	<i>2000 Positive</i>	<i>2001 Positive</i>	<i>2002 Positive</i>	<i>2003 Positive</i>	<i>2002-03 % Change</i>
Libraries	Na	41%	64%	66%	+2%
Ambulance services	63%	48%	63%	63%	N/C
Policing	65%	58%	51%	59%	+8%
Public transit	Na	32%	49%	57%	+8%
Fire protection	Na	62%	74%	55%	-19%
Re-greening of the City	65%	52%	39%	55%	+16%
Public health unit services	59%	44%	59%	55%	-4%
Promoting the reduction of waste	46%	37%	49%	49%	N/C
Recreational facilities	Na	45%	53%	49%	-4%
Promoting tourism	41%	44%	30%	46%	+16%
Pioneer Manor	40%	30%	35%	45%	+10%
Leisure programs	Na	33%	37%	39%	+2%
Water and sewer services	53%	32%	31%	35%	+4%
Planning for the City's future	39%	40%	35%	34%	-1%
Ensuring building safety	44%	30%	45%	33%	-12%
Landfill sites	36%	27%	41%	33%	-8%
Winter road maintenance	44%	38%	37%	32%	-5%
Economic diversification	31%	26%	20%	30%	+10%
Providing welfare assistance	34%	21%	28%	27%	-1%
Providing affordable housing	33%	26%	28%	25%	-3%
Providing quality of land development	20%	16%	14%	21%	+7%
Maintenance of main roads	23%	26%	21%	18%	-3%
Developing job creation initiatives	24%	17%	14%	16%	+2%
Child care funding	20%	7%	16%	13%	-3%

There were 11 categories where ratings dropped and 11 that witnessed increases, while two had no change. While top two ratings remained low, the areas that saw the largest positive increases were for promoting tourism (+16%) and re-greening (+16%), while the most precipitous drops were for fire protection (-19%) and ensuring building safety (-12%).

<i>Rating Services by Department</i>	<i>2000 Positive</i>	<i>2001 Positive</i>	<i>2002 Positive</i>	<i>2003 Positive</i>	<i>2002-03 % Change</i>
Emergency Services					
Ambulance services	63%	48%	63%	63%	N/C
Fire protection	Na	62%	74%	55%	-19%
Police Services					
Policing	65%	58%	51%	59%	+8%
Public Health					
Public health unit services	59%	44%	59%	55%	-4%
Public Works					
Promoting the reduction of waste	46%	37%	49%	49%	N/C
Water and sewer services	53%	32%	31%	35%	+4%
Winter road maintenance	44%	38%	37%	32%	-5%
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Re-greening of the City	65%	52%	39%	55%	+16%
Promoting tourism	41%	44%	30%	46%	+16%
Planning for the City's future	39%	40%	35%	34%	-1%
Economic diversification	31%	26%	20%	30%	+10%
Ensuring building safety	44%	30%	45%	33%	-12%
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Developing job creation initiatives	24%	17%	14%	16%	+2%
Citizen Services					
Libraries	Na	41%	64%	66%	+2%
Public transit	Na	32%	49%	57%	+8%
Recreational facilities	Na	45%	53%	49%	-4%
Leisure programs	Na	33%	37%	39%	+2%
Social Services					
Pioneer Manor	40%	30%	35%	45%	+10%
Providing welfare assistance	34%	21%	28%	27%	-1%
Child care funding	20%	7%	16%	13%	-3%

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.

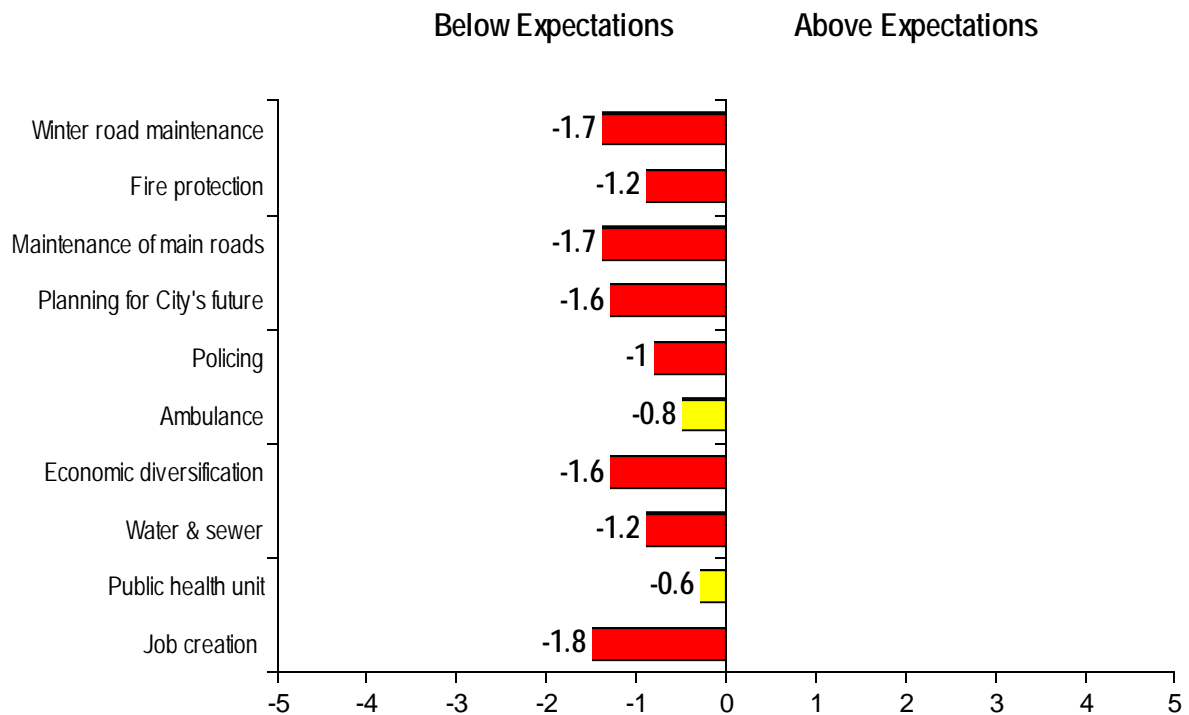


Satisfaction levels (satisfied and very satisfied) with the **range of services** provided by the City remained stable over the past year increasing slightly (+4%). However, the neutral score decreased 9% with the shift moving to the dissatisfied category, which increased 9%.

A total of 58% of respondents had contact with a municipal staff member, of which 54% rated this experience as being positive, down from a 64% positive rating in 2002. A lack of response or action and poor service were the improvement areas cited.

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 *higher* 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 related to job creation and the two road related areas of maintenance and winter maintenance. Gaps are also evident with respect to

the economic related areas of job creation and planning for the future of the City.

Budget issues

Respondents were read and asked to agree or disagree with each of the following statements that will be **used by municipal Council to prepare the 2003 Budget**.

	Total Agree			
	2000	2001	2002	2003
Rather than building new facilities or roads, the City should invest in maintaining and improving existing facilities and roads	64%	76%	69%	78%
Where appropriate the direct users of City services should pay for the cost of providing those services	59%	48%	49%	47%
The City should reduce service levels by whatever is needed in order to hold the line on taxes	28%	31%	26%	22%
The City should maintain current levels of service and increase taxes up to 5%	16%	32%	28%	30%

Respondents continue to most agree with the statement that rather than building new facilities or roads, the City should invest in maintaining and improving existing facilities and roads. As well, there remains a low tolerance for service reductions and for the implementation of user fees.