



Onward and Corporate Branding Research

Detailed Report

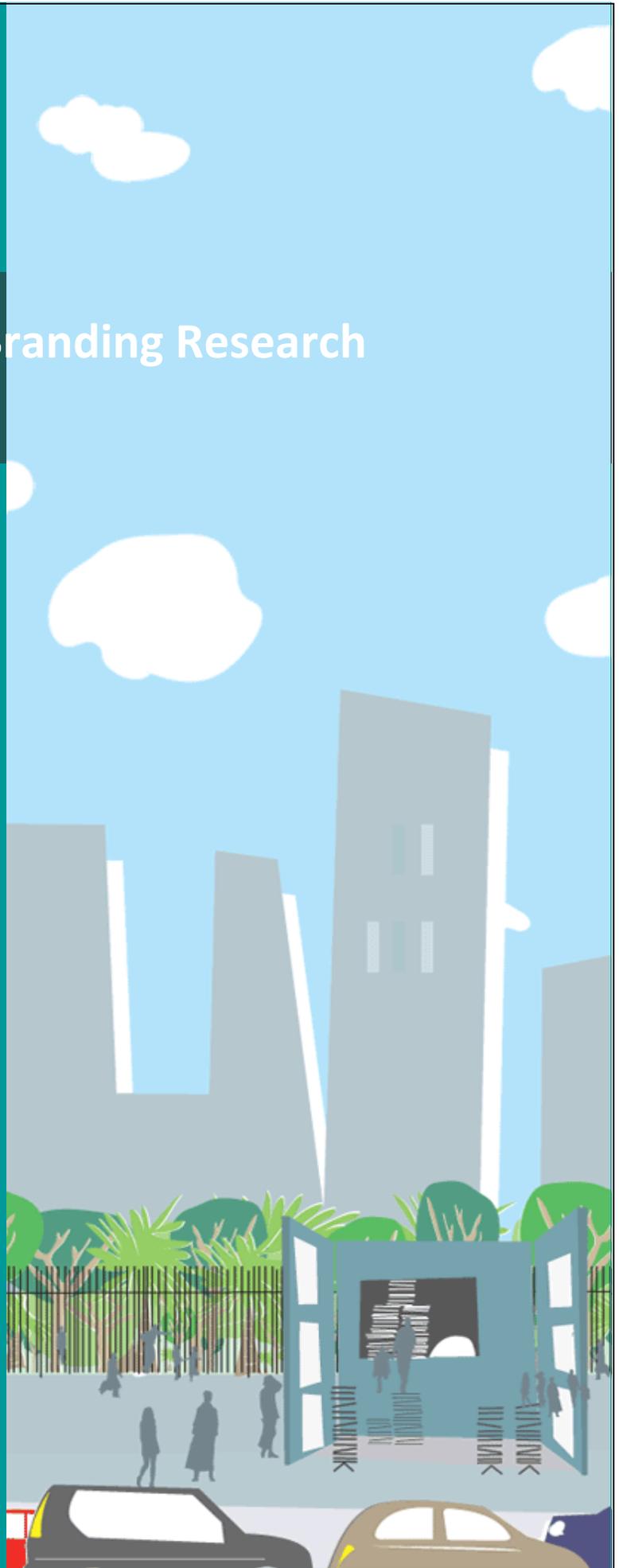
Prepared For:

The City of Calgary

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Project Overview

Background

Onward has been The City of Calgary's official motto since 1884. Through City Council and other efforts such as imagineCALGARY and PlanIt, citizens have set ambitious visions for Calgary, and it is the responsibility of The City to undertake programs and services to achieve those visions. Part of that responsibility is to communicate to citizens how each and every program or service The City offers helps achieve those visions.

The City is currently working on its Onward strategy. The initiative looks to connect both employees and citizens to the Corporation's visions and achievements, as well as to present The City with "one voice" – a consistent story and visual identity.

Further, The City is interested in exploring citizens' ideas about which brand attributes the Corporation should strive for.

Research Objectives

This study aims to assess citizens' perceptions of the Corporation's visions and their understanding of City services being tied to those visions.

Further, The City wishes to understand its current brand – that is, the overall impressions citizens have of the organization, based on the totality of their interactions with the Corporation (including individual business units and their sub-brands). The City would like to understand how their interactions with individual business units (e.g., Waste and Recycling Services, Recreation, Development and Building Approvals) influence each others' sub-brands and combine and contribute to the overall City brand.

Methodology

Respondents were selected using Ipsos' Online Panel of Respondents – the sample was drawn to be representative of the city's population based on age and gender. A total of 503 online 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 Calgary.

The survey consisted of 29 questions, including attitudinal and value statements asking Calgarians about their perceptions of The City and the key attributes it should be projecting as an organization.

The survey was fielded from March 09 to March 16, 2012.

The 2011 figures on certain slides throughout this report are from the 2011 Citizen Satisfaction Survey. The 2009 figures are from The City of Calgary CESR study. **It is important to note that both of these studies were conducted via a telephone methodology and results are not directly comparable.*

Key Takeaways

Corporate Reputation

When asked to describe the characteristics and traits of The City of Calgary, citizens provide a mix of both positive and negative mentions. Two-thirds of respondents interviewed made positive mentions, which include “good facilities/services/amenities”, “good city/good place to live”, “busy/lively/vibrant”, “well run/effective leadership”, “beautiful (scenery)”, and “friendly/caring”. Just over one-half of respondents interviewed made negative mentions including “poorly run/ineffective leadership”, “poor city planning/infrastructure/transportation”, and “expensive/high cost of living/high taxes”.

Calgarians generally feel they know The City of Calgary well. Overall, eight-in-ten citizens feel they know The City well. While not directly comparable to 2009, the research suggests that citizens’ knowledge of The City of Calgary has increased significantly over the past few years.

Overall, Calgarians demonstrate a generally favourable or neutral view of The City of Calgary, which shows a substantial change over less favourable views captured in 2009. Nearly six-in-ten Calgarians have an overall favourable impression of The City; another one-quarter are neutral, leaving less than two-in-ten with an overall unfavourable impression. Directional comparisons suggest that overall favourability towards The City has increased significantly since 2009.

While overall levels of trust remain consistent over the last three years, there has been a significant increase in the level of advocacy among citizens. Similar to 2009, just less than one-half of citizens this year trust The City of Calgary, compared to three-in-ten who distrust The City. Another one-quarter are neutral in this regard. While overall trust in The City has not significantly changed over the last three years, the proportion saying they would advocate on The City’s behalf has increased to now stand at more than one-quarter of citizens. At the same time, there has been a decrease in the proportion of citizens who would be critical of The City.

When evaluating key values, Calgarians are not overwhelming in agreement across the board. This is not necessarily driven by a large contingent of citizens who are overtly negative, but can more likely be attributed to a general lack of awareness and understanding about how The Corporation exhibits these values. That said, given that this is a baseline study, there are certainly opportunities to grow each of the metrics related to these values through messaging and increasing awareness. Overall, the highest levels of agreement are seen for being a *good place to work*, *caring about the local community*, and *standing for Calgary’s values*. Conversely, citizens are most critical when asked about how well The City *keeps its promises*, with more citizens disagreeing than agreeing with this statement.

Perceptions of The City today are generally positive and citizens have even higher expectations for the future. When asked about the current and future states of The City of Calgary and its goals (a series of 16 statements), citizens agree that the statement that best reflects The City is *helps citizens understand The City programs and services that are available*. Conversely, the statement garnering the lowest level of agreement (both today and in the future) is *transparent in its decision-making*.

All of the priorities tested are important. Overall, citizens’ top priorities include *focusing on delivering core services to city residents*, *working with other organizations and levels of government to improve quality and access to services and quality of life*, and *working to establish a healthy, independent, and safe way of life for all*. Compared to 2009, there has been a significant increase in the perceived

importance of *safeguarding and strengthening Calgary's environment*. Conversely, there have been significant drops in the perceived importance of *focusing on delivering core services to city residents* and *working to establish a healthy, independent, and safe way of life for all*.

Perceptions of The City's success in these priority areas vary. Overall, citizens think The City has been most successful *safeguarding and strengthening Calgary's environment, focusing on delivering core services to city residents, and working to establish a healthy, independent, and safe way of life for all*. While perceptions of The City's performance in these areas have generally remained unchanged from 2009, one notable exception is for *working with other organizations and levels of government to improve quality and access to services and quality of life*; rather, citizens this year are much less likely now than in the past to say The City has been successful in this regard.

Opinion is mixed regarding how well The City reflects specific values today. Overall, citizens are most likely to agree that The City reflects the value *treating others with respect*. Conversely, less than one-half agree that The City currently reflects *accountability*.

Views about The City of Calgary Overall

The City of Calgary offers a good quality of life. Seven-in-ten citizens assess the quality of life in Calgary as good, compared to less than one-in-ten providing a poor rating. Directional comparisons suggest that the percentage saying Calgary offers a good quality of life has dropped significantly since 2011.

One-half say the quality of life in Calgary has stayed the same over the past three years. Another two-in-ten say it has improved and one-quarter say it has worsened, translating into a net momentum score of -5 points and suggesting that quality of life has deteriorated for some citizens over the past three years.

Perceptions of The City's services are predominately positive. More than eight-in-ten citizens rate the overall quality of City services as "very good" or "good"; less than two-in-ten provide a poor rating. Similarly, nearly two-thirds of citizens are also satisfied with the overall level and quality of City services and programs, compared to less than two-in-ten expressing dissatisfaction in this regard. Closer analysis of the data indicates that satisfaction with specific City services varies. Overall, citizens are most satisfied with the following six services: *protective services, the quality of drinking water, City operated parks/pathways/open spaces, waste management, City operated recreation programs, and animal and Bylaw services*. Conversely, the lowest satisfaction rating is seen for *transportation services*.

Four-in-ten Calgarians believe they receive good value for their municipal tax dollars. Conversely, one-quarter provide a poor value for money rating.

City Communications

One-half of citizens contacted or dealt with The City of Calgary in the last twelve months.

Furthermore, contact experiences are predominately positive, with nearly three-quarters of those who contacted The City expressing satisfaction with their most recent contact experience.

Nearly one-half of all citizens think they receive too little information from The City. In comparison, four-in-ten say they receive just the right amount of information, while very few say they receive too much information from The City. Overall, these results suggest there is room to increase the volume of communications with citizens.

Detailed Findings

Corporate Reputation

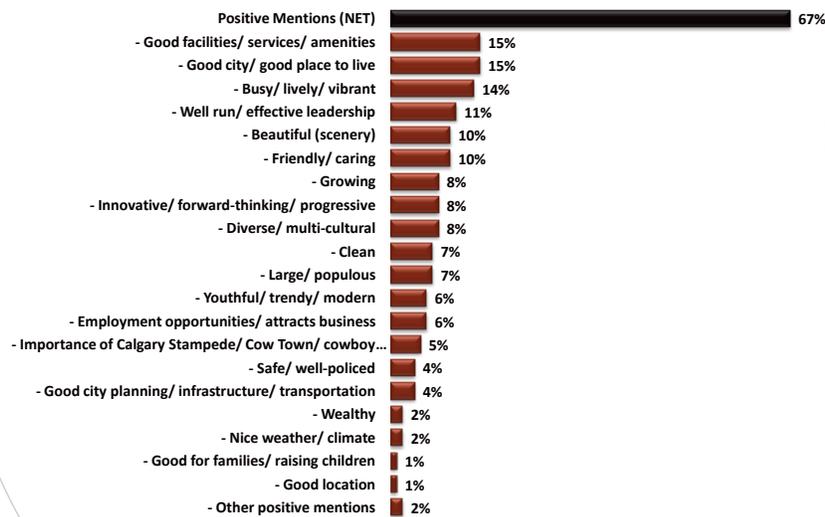
Perceived Traits and Characteristics of The City of Calgary

When asked to describe the characteristics and traits of The City of Calgary, citizens provide a mix of both positive and negative mentions.

Overall, 67% of mentions describe The City in positive terms, with the top positive mentions being “good facilities/services/amenities” (15%), “good city/good place to live” (15%), “busy/lively/vibrant” (14%), “well run/effective leadership” (11%), “beautiful (scenery)” (10%), and “friendly/caring” (10%).



PERCEIVED TRAITS AND CHARACTERISTICS OF THE CITY OF CALGARY



Base: All Respondents (n=503)

Q1: To begin, we'd like you to start off by describing The City of Calgary. Like many organizations, The City of Calgary has traits and characteristics, some may be positive and some may be less positive. Please provide us with as many words and/or phrases to describe The City of Calgary.

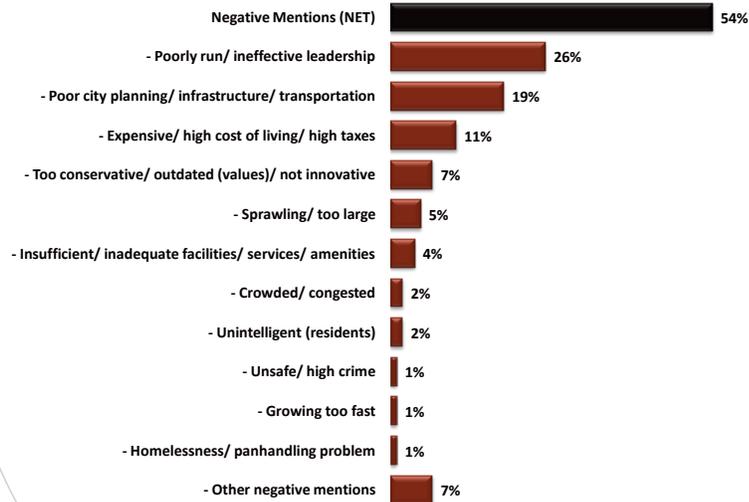
Ipsos Public Affairs

Analysis by key socio-demographic factors shows that citizens who are *more* likely to describe The City in **positive** terms include:

- Women (72%, compared to 61% of men);
- Those who are 55 years of age or older (78%, compared to 62% of 18 to 34 year olds and 65% of 35 to 54 year olds);
- Those with household incomes of less than \$60,000 (75%, compared to a low of 55% among those earning \$90,000 to less than \$120,000);
- Those who feel Calgary’s quality of life has “improved” over the past three years (81%, compared to 70% of those who feel the quality of life has “stayed the same” and 49% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (72%, compared to 37% of those rating the quality of services as “very poor/poor”);
- Those who are satisfied with the overall quality of City services (80%, compared to 50% of those who describe their satisfaction as average and 33% of dissatisfied respondents);
- Those who feel they receive good value for their property taxes (85%, compared to 64% describing this as average and 40% who feel they receive poor value for the taxes they pay);
- Those who are satisfied with their most recent City contact experience (73%, compared to 54% of those who are dissatisfied);
- Those who feel they receive “just the right amount” of information from The City (74%, compared to 61% of those who feel they receive “too little” information);
- Those who have a predominately favourable impression of The City overall (88%, compared to 50% of those with a neutral impression and 24% of those with a mainly unfavourable impression);
- Those who “trust The City a great deal” (97%, compared to a low of 34% among those who “distrust The City a great deal”); and,
- Those who would advocate for The City (96%, compared to 68% of those with a neutral opinion and 34% of those who would be critical of The City).

Conversely, 54% are negative in tone, including “poorly run/ineffective leadership” (26%), “poor city planning/infrastructure/transportation” (19%), and “expensive/high cost of living/high taxes” (11%).

 **PERCEIVED TRAITS AND CHARACTERISTICS OF THE CITY OF CALGARY** *(continued)*



Base: All Respondents (n=503)

Q1: To begin, we'd like you to start off by describing The City of Calgary. Like many organizations, The City of Calgary has traits and characteristics, some may be positive and some may be less positive. Please provide us with as many words and/or phrases to describe The City of Calgary.

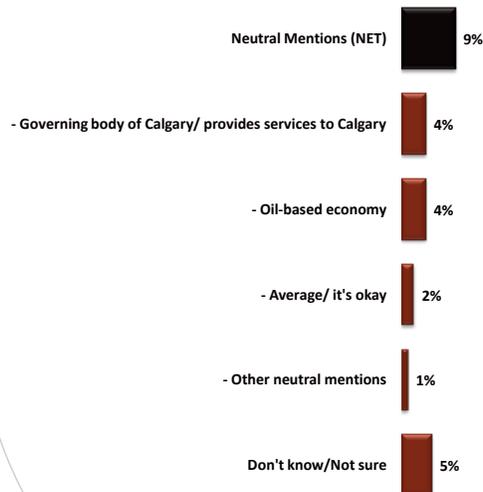
Ipsos Public Affairs

Citizens who are *more* likely to describe The City in **negative** terms include:

- Those living in single family homes (58%, compared to a low of 41% among those living in an apartment or condominium);
- Those who feel Calgary’s quality of life has “worsened” over the past three years (73%, compared to 49% of those who feel the quality of life has “stayed the same” and 44% of those who feel it has “improved”);
- Those who rate the quality of City services as “very poor/poor” (80%, compared to 49% of those rating the quality of services as “very good/good”);
- Those who are not satisfied with the overall quality of City services (90%, compared to 63% of those who describe their satisfaction as average and 44% of satisfied respondents);
- Those who feel they receive poor value for their property taxes (77%, compared to 55% describing this as average and 39% who feel they receive good value for the taxes they pay);
- Those who feel they receive “too little” information from The City (63%, compared to a low of 44% among those who feel they receive “just the right amount” of information);
- Those who have a predominately unfavourable impression of The City overall (89%, compared to 67% of those with a neutral impression and 38% of those with a favourable impression);
- Those who distrust The City “a great deal” or “a little” (94% and 85%, respectively, compared to a low of 22% among those who “trust The City a great deal”); and,
- Those who would be critical of The City (88%, compared to 53% of those with a neutral opinion and 23% of advocates).

Another 9% of mentions are neutral in tone.

 **PERCEIVED TRAITS AND CHARACTERISTICS OF THE CITY OF CALGARY** *(continued)*



Base: All Respondents (n=503)
 Q1: To begin, we'd like you to start off by describing The City of Calgary. Like many organizations, The City of Calgary has traits and characteristics, some may be positive and some may be less positive. Please provide us with as many words and/or phrases to describe The City of Calgary.

Ipsos Public Affairs

Citizens who are *more* likely to describe The City in **neutral** terms include:

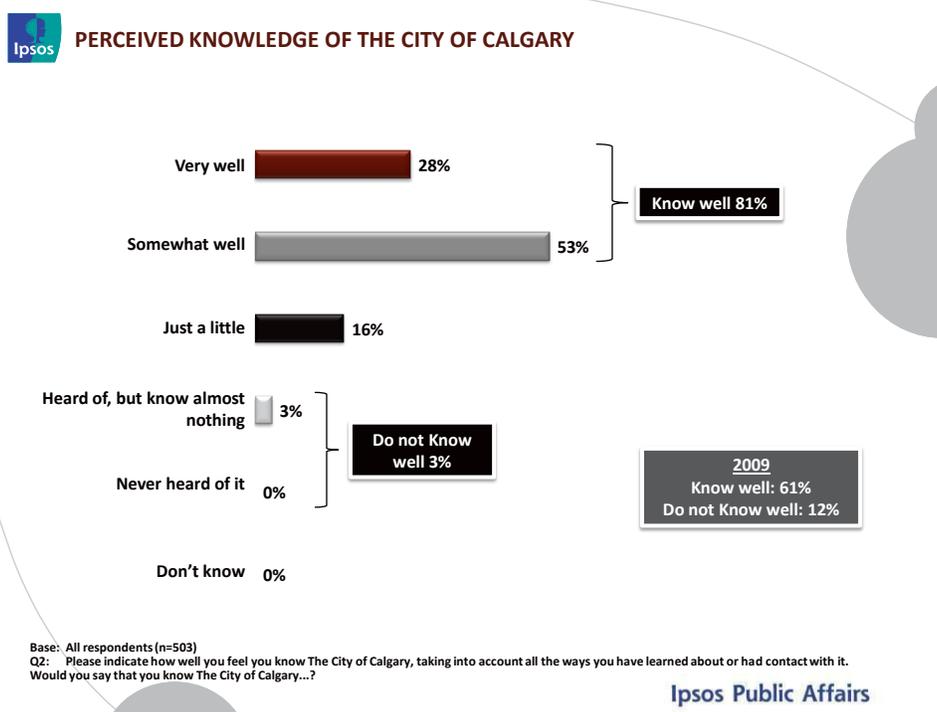
- Those with household incomes of \$90,000 to less than \$120,000 (16%, compared to a low of 4% among those earning \$120,000 or more);
- Those who feel Calgary's quality of life has "stayed the same" over the past three years (13%, compared to a low of 4% among those who feel the quality of life has "worsened"); and,
- Those who feel they receive good value for their property taxes (13%, compared to a low of 4% among those who feel they receive poor value for the taxes they pay).

Perceived Knowledge of The City of Calgary

Calgarians generally feel they know The City of Calgary well.

Overall, 81% of Calgarians feel they know The City of Calgary well, including 28% saying “very well”. Another 16% feel they know The City “just a little”, while 3% indicate they do not know The City well at all (includes those saying “heard of, but know almost nothing” and “never heard of it”).

While not directly comparable to 2009, the research suggests that citizens’ knowledge of The City of Calgary has increased significantly over the past few years.



Analysis by key subgroups finds that citizens who are *more* likely to say they know The City **well** (includes combined “very/somewhat well” mentions) include:

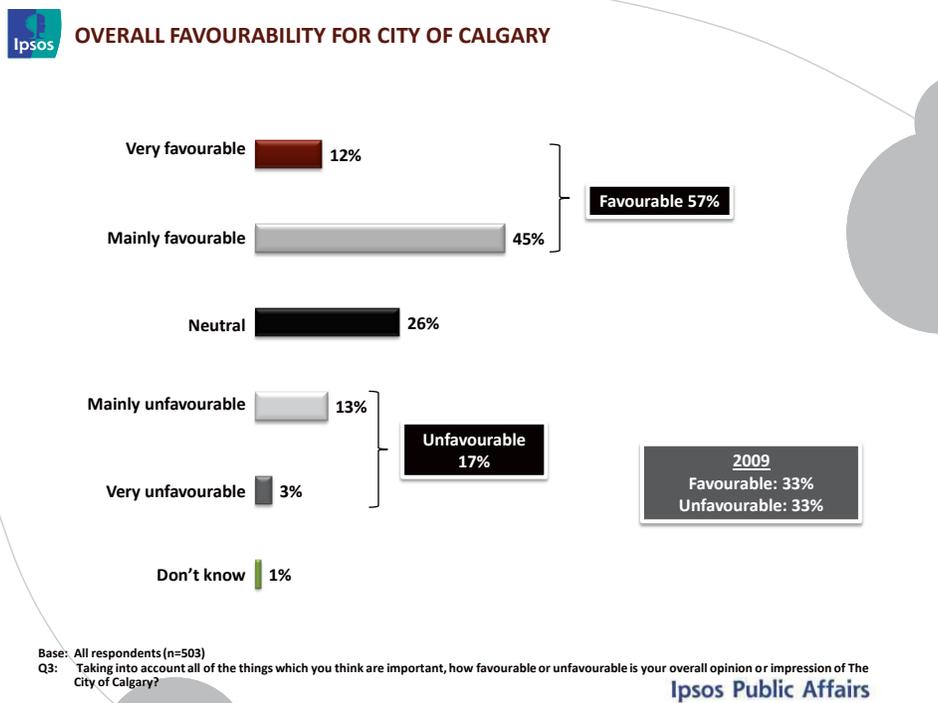
- Those who are 55 years of age or older (92%, compared to 76% of 18 to 34 year olds and 79% of 35 to 54 year olds);
- Those who are responsible for paying property taxes or rent (83%, compared to 66% of those who are not responsible for these payments); and,
- Homeowners (84%, compared to 71% of renters).

Overall Favourability for City of Calgary

The majority of citizens have a favourable impression of The City of Calgary; another one-quarter are neutral.

Nearly six-in-ten (57%) Calgarians have an overall favourable impression of The City of Calgary, including 12% describing this as “very favourable”. Another one-quarter (26%) are neutral, leaving 17% with an overall unfavourable impression of The City.

Directional comparisons suggest that overall favourability towards The City of Calgary has increased significantly since 2009.



Citizens who are *more* likely to say they have an overall **favourable** (combined “very/mainly favourable” mentions) impression of The City of Calgary include:

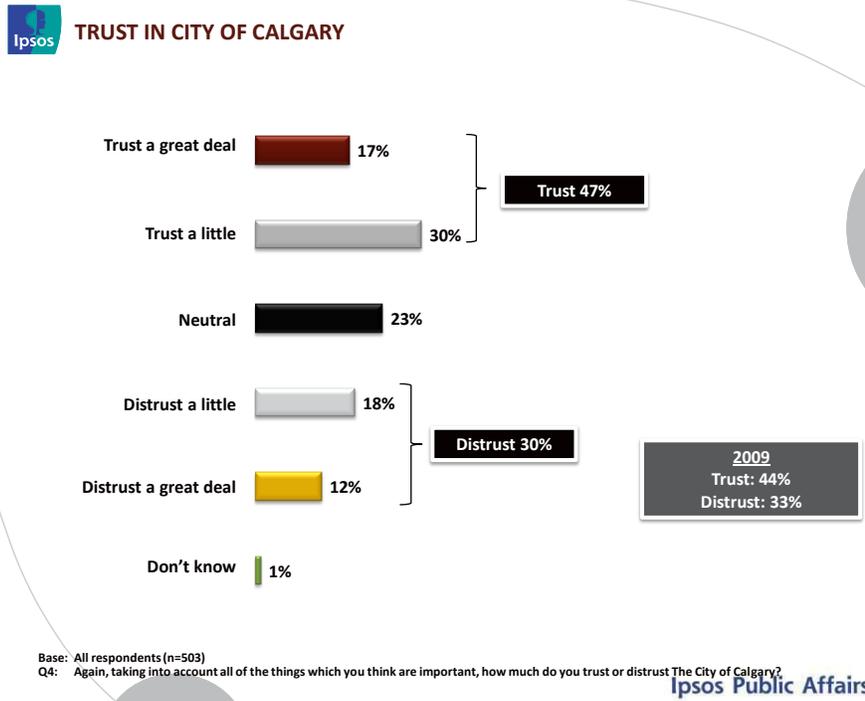
- Women (63%, compared to 51% of men);
- Those who are 55 years of age or older (71%, compared to 49% of 18 to 34 year olds and 58% of 35 to 54 year olds)
- Those who feel Calgary’s quality of life has “improved” over the past three years (79%, compared to 60% of those who feel the quality of life has “stayed the same” and 31% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (64%, compared to 19% of those providing a “very poor/poor” rating);
- Those who are satisfied with the overall quality of City services (73%, compared to 40% of those who describe their satisfaction as average and 9% of dissatisfied respondents);
- Those who feel they receive good value for their property taxes (82%, compared to 51% describing this as average and 24% who feel they receive poor value for the taxes they pay);
- Those who are satisfied with their most recent City contact experience (65%, compared to 39% of dissatisfied respondents);
- Those who feel they receive “just the right amount” of information from The City (71%, compared to a low of 46% among those who feel they receive “too little” information); and,
- Those who “trust The City a great deal” (98%, compared to a low of 8% among those who “distrust The City a great deal”).

Trust in City of Calgary

Citizens are more trusting than untrusting of The City of Calgary.

In total, 47% of Calgarians trust The City of Calgary, including 17% saying they trust The City “a great deal”. Another 23% are neutral in their opinion and 30% distrust The City.

Trust in The City of Calgary has not significantly changed over the last three years.



Citizens who are *more* likely to **trust** (combined “trust a great deal/trust a little” mentions) The City of Calgary include:

- Women (53%, compared to 41% of men);
- Homeowners (52%, compared to 34% of renters);
- Those who feel Calgary’s quality of life has “improved” over the past three years (70%, compared to 50% of those who feel the quality of life has “stayed the same” and 20% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (53%, compared to 16% of those providing a “very poor/poor” rating);
- Those who are satisfied with the overall quality of City services (64%, compared to 22% of those who describe their satisfaction as average and 5% of dissatisfied respondents);
- Those who feel they receive good value for their property taxes (74%, compared to 36% describing this as average and 15% who feel they receive poor value for the taxes they pay);
- Those who are satisfied with their most recent City contact experience (54%, compared to 33% of dissatisfied respondents); and,
- Those who feel they receive “just the right amount” of information from The City (61%, compared to a low of 35% among those who feel they receive “too little” information); and,
- Those who have a predominately favourable impression of The City overall (72%, compared to 20% of those with a neutral impression and 6% of those with a mainly unfavourable impression).

Interestingly, trust in The City does not significantly vary by how well citizens feel they know The City.

Advocacy of The City of Calgary

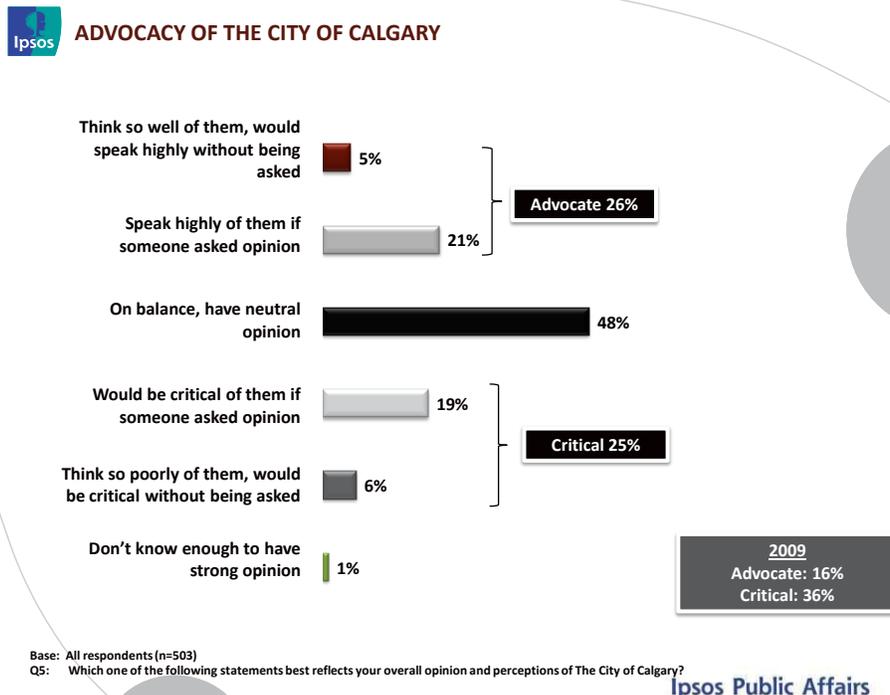
Opinion is mixed when it comes to advocating for The City of Calgary.

Overall, more than one-quarter (26%) of citizens would advocate for The City of Calgary, with 5% saying “I think so well of them I would speak highly without being asked” and 21% saying “I would speak highly of them if someone asked my opinion”.

A similar proportion (25%) would act as critics of The City, with 6% saying “I think so poorly of them I would be critical without being asked” and 19% saying “I would be critical of them if someone asked my opinion”.

Another 48% say that “on balance, I have a neutral opinion of them, seeing both positives and negatives”.

Comparisons to 2009 highlight a significant shift in attitudes regarding advocacy for The City of Calgary, with citizens this year much more likely to say they would advocate on The City’s behalf. At the same time, there has also been a significant decrease in the proportion of residents who are outwardly critical of the organization.



Citizens who are *more* likely to be strong **advocates** of The City (e.g., would speak highly of them without being asked) include:

- Those living in two-person households (8%, compared to a low of 2% among those living in households of three or more people);
- Renters (10%, compared to 3% of homeowners);
- Those living in an apartment or condominium (10%, compared to a low of 3% among those in single family homes);
- Those who feel Calgary’s quality of life has “improved” over the past three years (11%, compared to 4% of those who feel the quality of life has “stayed the same” and 1% of those who feel it has “worsened”);
- Those who are satisfied with the overall quality of City services (7%, compared to 1% of those who describe their satisfaction as average and 0% of dissatisfied respondents);
- Those who feel they receive good or average value for their property taxes (7% and 5%, respectively, compared to 0% who feel they receive poor value for the taxes they pay);
- Those who have a predominately favourable impression of The City overall (8%, compared to 0% of those with a neutral impression and 0% of those with a mainly unfavourable impression); and,
- Those who “trust The City a great deal” (20%, compared to a low of 0% among those who “distrust The City a great deal”).

Citizens who are *more* likely to be strong **critics** of The City (e.g., would be critical of them without being asked) include:

- Men (9%, compared to 3% of women);
- Those who feel Calgary’s quality of life has “worsened” over the past three years (14%, compared to 3% of those who feel the quality of life has “stayed the same” and 4% of those who feel it has “improved”);
- Those who rate the quality of City services as “very poor/poor” (24%, compared to 3% of those providing a “very good/good” rating);
- Those who are not satisfied with the overall quality of City services (30%, compared to 3% of those who describe their satisfaction as average and 2% of satisfied respondents);
- Those who feel they receive poor value for their property taxes (20%, compared to 2% describing this as average and 1% who feel they receive good value for the taxes they pay);
- Those who are not satisfied with their most recent City contact experience (16%, compared to 5% of satisfied respondents);
- Those who feel they receive “too little” information from The City (9%, compared to 2% of those who feel they receive “just the right amount” of information);
- Those who have a predominately unfavourable impression of The City overall (32%, compared to 2% of those with a neutral impression and 0% of those with a mainly favourable impression); and,
- Those who “distrust The City a great deal” (42%, compared to a low of 0% among those who “trust The City a great deal”).

Evaluating Onward and Corporate Branding

Attitudes towards City of Calgary’s Values

Overall attitudes towards The City of Calgary’s values vary.

The most positive impressions are seen regarding The City’s work environment, care for the community, and embodiment of Calgary’s values, with more than six-in-ten citizens agreeing with each of these statements.

- The City “is a good place to work” (66% agree, including 22% “strongly agree”).
- The City “cares about the local community” (66% agree, including 13% “strongly agree”).
- The City “stands for Calgary’s values” (64% agree, including 17% “strongly agree”).

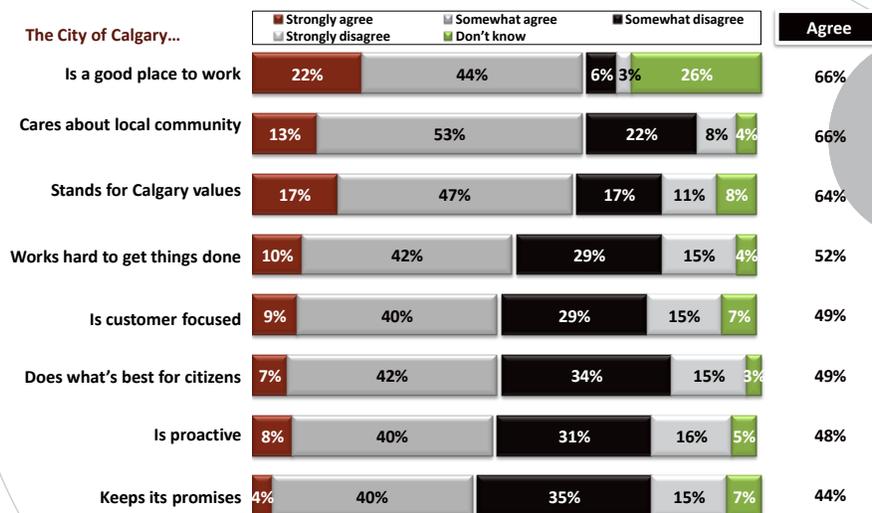
A more mixed view is seen in other areas of The City’s values, with approximately equal proportions of citizens agreeing and disagreeing with each of the following statements.

- The City “works hard to get things done for citizens” (52% agree, 44% disagree).
- The City “is customer-focused” (49% agree, 44% disagree).
- The City “does what’s best for citizens” (49% agree, 49% disagree).
- The City “is proactive about meeting the needs of citizens” (48% agree, 47% disagree).

Citizens are most critical when asked whether The City “keeps its promises”, with 50% of citizens disagreeing with this statement, compared to 44% who are in agreement.



ATTITUDES TOWARDS CITY OF CALGARY’S VALUES



Base: All respondents (n=503)
 Q6: For each of the following statements, please tell us whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree that the statement accurately describes The City of Calgary.

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- Overall, women are *more* likely than men to **agree** (combined “strongly/somewhat agree” mentions) that The City *cares about the local community* (74% versus 59%, respectively), *stands for Calgary values* (71% versus 56%), *works hard to get things done for citizens* (60% versus 44%), *does what’s best for its citizens* (56% versus 41%), *is proactive about meeting the needs of citizens* (54% versus 42%), and *keeps its promises* (49% versus 38%). No significant differences by gender are seen in the other areas.

Interestingly, **agreement** with two of these statements is significantly *higher* among those who have not contacted The City in the last 12 months. Specifically, among those who have not contacted The City, 72% agree that The City *cares about the local community* (compared to 61% of those who have contacted The City) and 55% agree that The City *is proactive about meeting the needs of citizens* (compared to 42% of those who have contacted The City).

Citizen Perceptions of The City Today and in the Future

Perceptions of The City today are generally positive and citizens have even higher expectations for the future.

Respondents were presented with a series of statements about The City of Calgary and asked how well this describes The City today as well as how likely it is to describe The City in the future.

Thinking of The City **today**...

Citizens are most likely to agree with the following eight statements:

- “Helps citizens understand The City programs and services that are available” (78% agree, including 22% “strongly agree”).
- “Is developing long-term visions for Calgary” (73% agree, including 21% “strongly agree”).
- “Has a consistent approach to how it communicates with citizens about programs and services” (71% agree, including 14% “strongly agree”).
- “Provides programs and services that are based on long-term visions for Calgary” (68% agree, including 14% “strongly agree”).
- “Communicates with citizens in a simplified way” (66% agree, including 12% “strongly agree”).
- “Communicates with citizens in a consistent way” (64% agree, including 14% “strongly agree”).
- “Uses long-term visions as a guide to make decisions” (62% agree, including 13% “strongly agree”).
- “Is easy to do business with” (61% agree, including 7% “strongly agree”).

The majority of citizens also agree that The City:

- “Communicates with citizens that all City programs and services are connected” (59% agree, including 11% “strongly agree”).
- “Can be trusted to make decisions so that Calgary achieves its long-term visions” (55% agree, including 10% “strongly agree”).
- “Makes spending decisions that are linked to long-term visions for Calgary” (54% agree, including 10% “strongly agree”).

Opinion is split or even trends negative when it comes to:

- “Helps citizens understand their role in ensuring that Calgary achieves its long-term visions” (51% agree, 49% disagree).
- “Helps citizens understand how tax dollars are being spent” (50% agree, 50% disagree).
- “Allows citizens to have meaningful input into decision-making” (48% agree, 52% disagree).
- “Communicates with citizens about the reasons why they make decisions” (47% agree, 53% disagree).
- “Is transparent in its decision-making” (44% agree, 56% disagree).

When asked how likely it is that The City of Calgary will represent these statements in the future, the research indicates that citizens expect The City to maintain or improve its performance in all of these areas over the next few years. The areas where the *biggest* improvements are expected include communicating how City programs and services are connected (up 15 points compared to how The City is seen to be performing today), allowing citizens to have meaningful input into decision-making (up 12 points), helping citizens understand their role in ensuring Calgary achieves its long-term vision (up 11 points), being transparent in its decision-making (up 11 points), and communicating with citizens about the reasons why they make decisions (up 10 points).

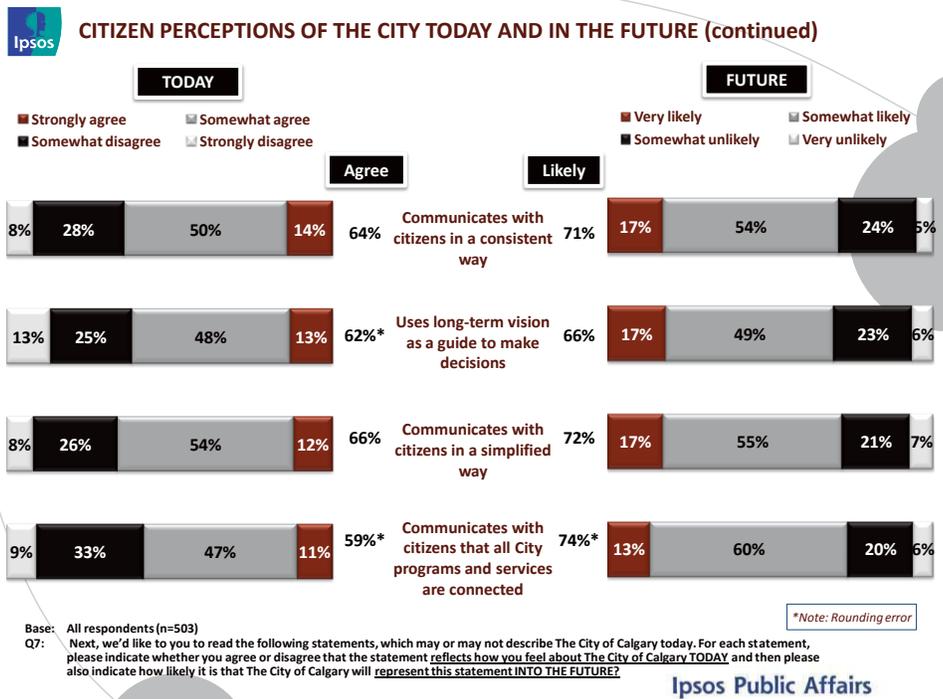
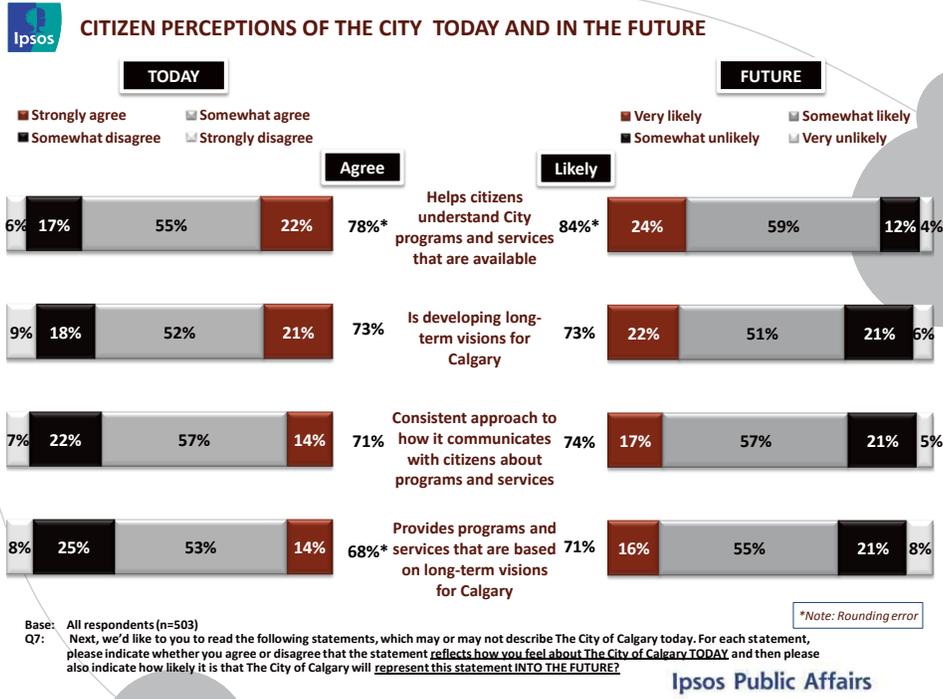
Specifically, when asked how likely The City of Calgary is to achieve each of these in the **future**...

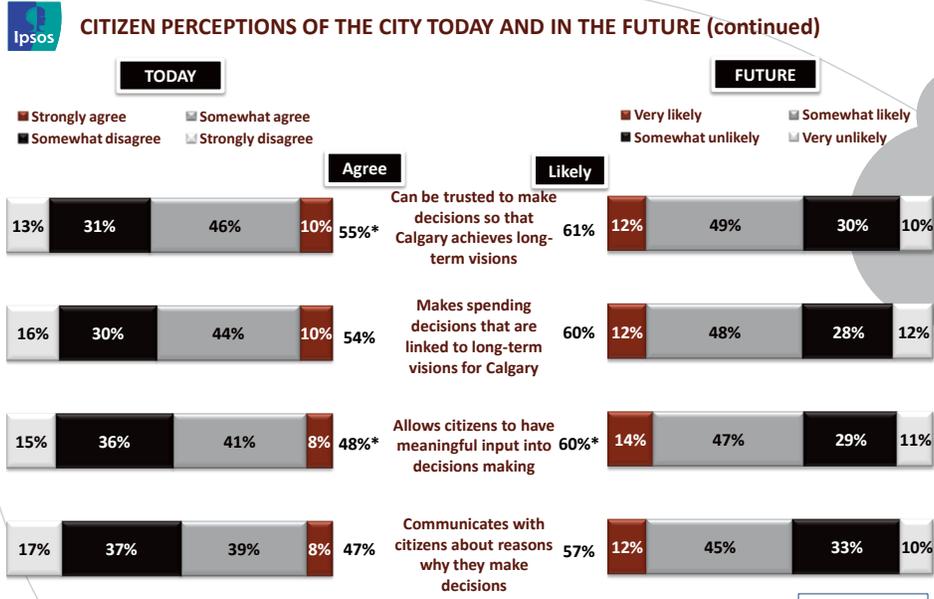
Citizens are most likely to anticipate The City achieving the following:

- “Helps citizens understand The City programs and services that are available” (84% likely, including 24% “very likely”).
- “Has a consistent approach to how it communicates with citizens about programs and services” (74% likely, including 17% “very likely”).
- “Communicates with citizens that all City programs and services are connected” (74% likely, including 13% “very likely”).
- “Is developing long-term visions for Calgary” (73% likely, including 22% “very likely”).
- “Communicates with citizens in a simplified way” (72% likely, including 17% “very likely”).
- “Communicates with citizens in a consistent way” (71% likely, including 17% “very likely”).
- “Provides programs and services that are based on long-term visions for Calgary” (71% likely, including 16% “very likely”).

The majority of citizens also expect each of the following to describe The City in the future:

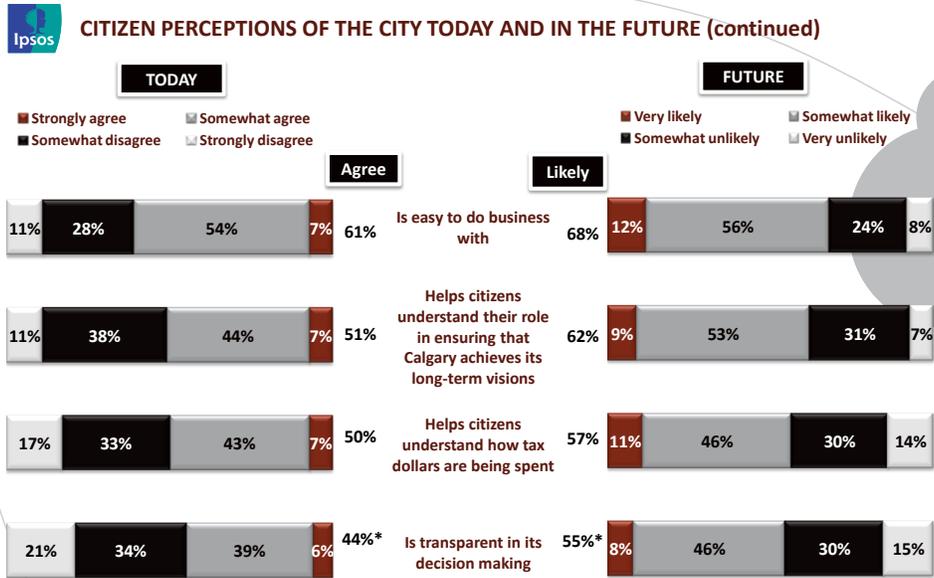
- “Is easy to do business with” (68% likely, including 12% “very likely”).
- “Uses long-term visions as a guide to make decisions” (66% likely, including 17% “very likely”).
- “Helps citizens understand their role in ensuring that Calgary achieves its long-term visions” (62% likely, 9% including “very likely”).
- “Can be trusted to make decisions so that Calgary achieves its long-term visions” (61% likely, including 12% “very likely”).
- “Allows citizens to have meaningful input into decision-making” (60% likely, including 14% “very likely”).
- “Makes spending decisions that are linked to long-term visions for Calgary” (60% likely, including 12% “very likely”).
- “Communicates with citizens about the reasons why they make decisions” (57% likely, including 12% “very likely”).
- “Helps citizens understand how tax dollars are being spent” (57% likely, including 11% “very likely”).
- “Is transparent in its decision-making” (55% likely, including 8% “very likely”).





Base: All respondents (n=503)
 Q7: Next, we'd like to you to read the following statements, which may or may not describe The City of Calgary today. For each statement, please indicate whether you agree or disagree that the statement reflects how you feel about The City of Calgary TODAY, and then please also indicate how likely it is that The City of Calgary will represent this statement INTO THE FUTURE?

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Base: All respondents (n=503)
 Q7: Next, we'd like to you to read the following statements, which may or may not describe The City of Calgary today. For each statement, please indicate whether you agree or disagree that the statement reflects how you feel about The City of Calgary TODAY, and then please also indicate how likely it is that The City of Calgary will represent this statement INTO THE FUTURE?

Ipsos Public Affairs

- Generally speaking, perceptions of The City both today and in the future tend to be *more positive* among women and those who are between 18 and 34 years of age, although this trend is not seen in all areas.
- For example, one notable exception to this is when considering how well The City helps citizens understand how tax dollars are being spent. When looking at perceptions of The City's performance today, **agreement** (combined "strongly/somewhat agree" mentions) is *highest* among those who are 55 years of age or older (59%, compared to 45% of 18 to 34 year olds and 48% of 35 to 54 year olds). No significant differences in opinion are seen by age when looking at future expectations of The City's performance in this area.

Furthermore, while not seen in all areas, those who have not contacted The City in the last 12 months also tend to demonstrate *more positive* views of The City, particularly when considering The City's current day performance.

Importance of Key City of Calgary Priority Areas

All of the priorities tested are important.

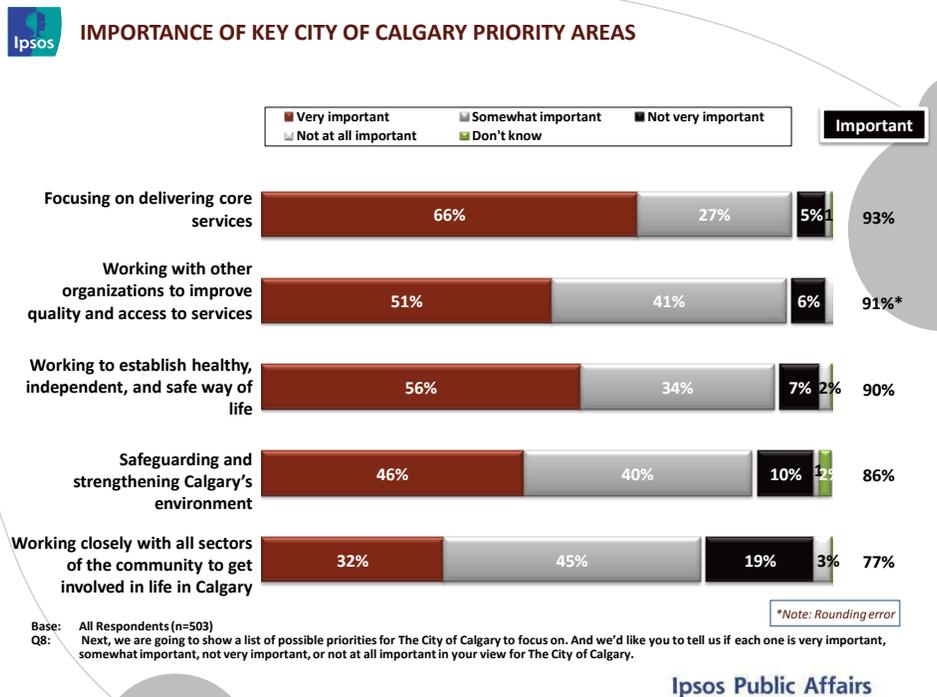
All of the priorities tested in the research are deemed important by more than three-quarters of citizens; many also enjoy relatively high “very important” ratings.

Overall, citizens’ top priorities include:

- “Focusing on delivering core services to city residents” (93% important, including 66% “very important”).
- “Working with other organizations and levels of government to improve quality and access to services and quality of life” (91% important, including 51% “very important”).
- “Working to establish a healthy, independent, and safe way of life for all” (90% important, including 56% “very important”).

Other important priorities include:

- “Safeguarding and strengthening Calgary’s environment” (86% important, including 46% “very important”).
- “Working closely with all sectors of the community, helping them to get involved in life in Calgary” (77% important, including 32% “very important”).



- Generally speaking, residents aged 55 years or older are *more* likely than those under the age of 55 to say these priority areas are **important** (combined “very/somewhat important” mentions). The one exception to this is for *safeguarding and strengthening Calgary’s environment*, in which the perceived importance is consistent across all key age groups.

There have been some changes in the perceived importance of these priorities over the past three years.

Compared to 2009, citizens this year attach significantly greater importance to “safeguarding and strengthening Calgary’s environment”.

Conversely, there have been significant drops in the perceived importance of “focusing on delivering core services to city residents” and “working to establish a healthy, independent, and safe way of life for all”.

No significant differences are seen in the importance attached to “working with other organizations and levels of government to improve quality and access to services and quality of life” and “working closely with all sectors of the community, helping them to get involved in life in Calgary”.



IMPORTANCE OF KEY CITY OF CALGARY PRIORITY AREAS

KEY PRIORITY AREA	2009	2012
Focusing on delivering core services	97%	93%
Working with other organizations to improve quality and access to services	92%	91%
Working to establish healthy, independent, and safe way of life	95%	90%
Safeguarding and strengthening Calgary’s environment	80%	86%
Working closely with all sectors of the community to get involved in life in Calgary	80%	77%

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Success Measures of Key Priority Areas

Perceptions of The City's success in these priority areas vary.

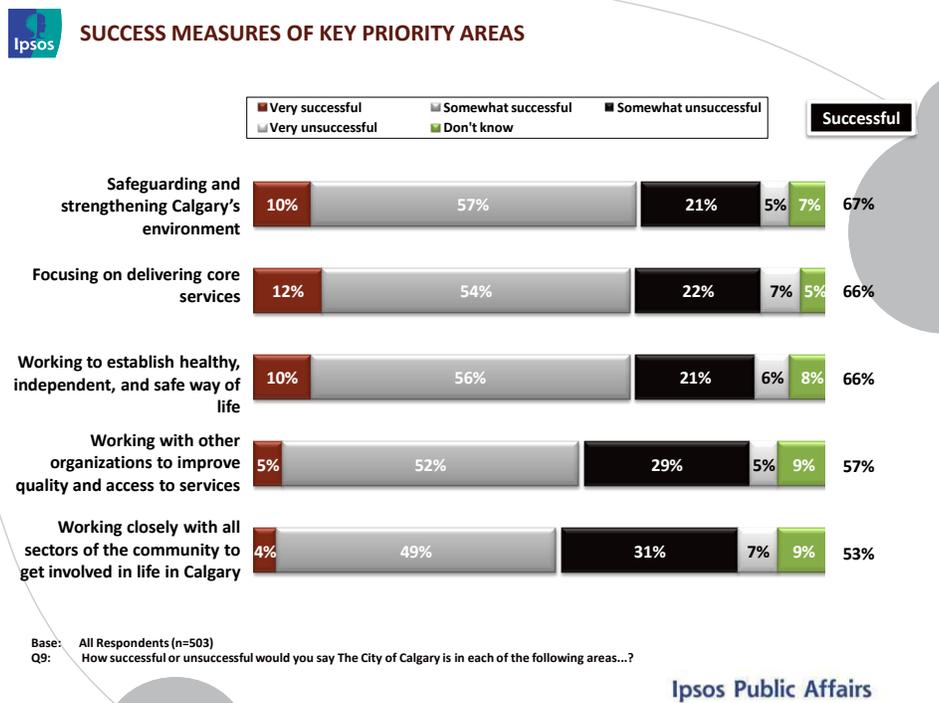
The majority of citizens think The City has been successful in all of these priority areas. However, closer analysis of the data shows that some areas are clearly deemed more successful than others. It is also worth noting that the percentage of citizens saying The City has been “very successful” is relatively low in all instances, pointing to a more tempered view of performance.

Of the priorities tested, citizens think The City has been most successful in the following three areas:

- “Safeguarding and strengthening Calgary’s environment” (67% successful, including 10% “very successful”).
- “Focusing on delivering core services to city residents” (66% successful, including 12% “very successful”).
- “Working to establish a healthy, independent, and safe way of life for all” (66% successful, including 10% “very successful”).

The majority of citizens also think The City has been successful when it comes to:

- “Working with other organizations and levels of government to improve quality and access to services and quality of life” (57% successful, including 5% “very successful”).
- “Working closely with all sectors of the community, helping them to get involved in life in Calgary” (53% successful, including 4% “very successful”).



Analysis by key socio-demographic subgroups shows that citizens who are *more* likely to say The City has been **successful** in these areas include:

- Those who feel the quality of life in Calgary has “improved” over the past three years;
- Those who rate the quality of City services as “very good/good”;
- Those who are satisfied with the overall quality of City services;
- Those who feel they receive good value for their property taxes;
- Those who are satisfied with their most recent City contact experience;
- Those who feel they receive “just the right amount” of information from The City;
- Those who have a predominately favourable impression of The City overall;
- Those who trust The City either a “great deal” or a “little”; and,
- Those who would advocate for The City.

Perceptions of how well The City works with other organizations to improve quality and access to services have decreased significantly over the past few years.

Citizens’ perceptions of The City’s performance in these key priority areas have generally remained unchanged over the past three years with one exception. Specifically, citizens this year are much less likely to say The City has been successful when it comes to “working with other organizations and levels of government to improve quality and access to services and quality of life”.



SUCCESS MEASURES OF KEY PRIORITY AREAS

KEY PRIORITY AREA	2009	2012
Focusing on delivering core services	70%	66%
Working with other organizations to improve quality and access to services	65%	57%
Working to establish healthy, independent, and safe way of life	64%	66%
Safeguarding and strengthening Calgary’s environment	67%	67%
Working closely with all sectors of the community to get involved in life in Calgary	58%	53%

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Analysis of importance versus success shows significant gaps in The City’s performance.

Side-by-side analysis of the perceived importance of and The City’s success in these priority areas shows that importance exceeds success in all areas. This analysis highlights where the largest gaps in performance exist and identify the most pressing areas for improvement.

Overall, the largest gap between perceived importance and success is seen when considering the attribute “working with other organizations and levels of government to improve quality and access to services and quality of life” (gap of 34 points). In other words, while this attribute is highly important to citizens, perceptions of The City’s performance in this area are significantly lower.

Other areas where there are large gaps in performance include “focusing on delivering core services to city residents” (gap of 27 points), “working to establish a healthy, independent, and safe way of life for all” (gap of 24 points), “working closely with all sectors of the community, helping them to get involved in life in Calgary” (gap of 24 points), and “safeguarding and strengthening Calgary’s environment” (gap of 19 points).



IMPORTANCE VS. SUCCESS OF KEY PRIORITY AREAS

KEY PRIORITY AREA	IMPORTANCE	SUCCESS	+/- GAP
Focusing on delivering core services	93%	66%	27%
Working with other organizations to improve quality and access to services	91%	57%	34%
Working to establish healthy, independent, and safe way of life	90%	66%	24%
Safeguarding and strengthening Calgary’s environment	86%	67%	19%
Working closely with all sectors of the community to get involved in life in Calgary	77%	53%	24%

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Perceptions of City of Calgary Values

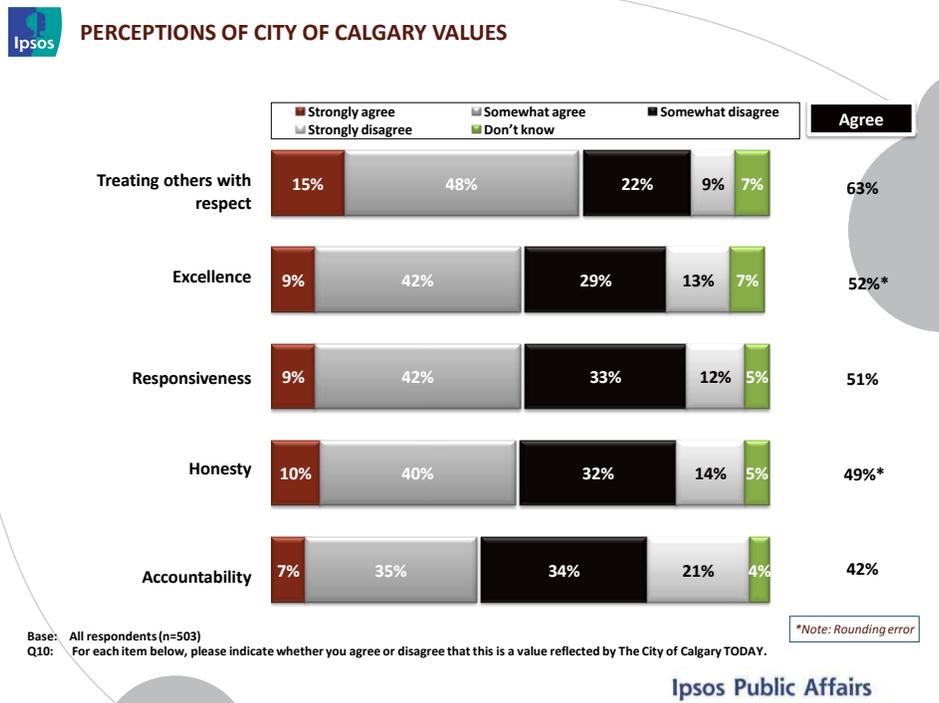
Opinion is mixed regarding how well The City reflects specific values today.

Overall, citizens are most likely to agree that The City of Calgary reflects the value “treating others with respect” (63% agree, including 15% “strongly agree”).

Agreement with the other values tested is lower, with approximately one-half of citizens agreeing that the following values are reflected by The City of Calgary today:

- “Excellence” (52% agree, 41% disagree).
- “Responsiveness” (51% agree, 45% disagree).
- “Honesty” (49% agree, 46% disagree).

Even fewer (42%) agree that The City currently reflects “accountability”; 54% disagree with this statement.



- Women are *more* likely than men to **agree** (combined “strongly/somewhat agree” mentions) that The City currently reflects *treating others with respect* (70% versus 55%, respectively), *honesty* (57% versus 41%), and *accountability* (50% versus 34%). No significant differences by gender are seen in the remaining areas.

Interestingly, citizens who feel they know The City “just a little” are *more* likely than those who feel The City well to **agree** that The City of Calgary *treats others with respect* (76% versus 62%, respectively).

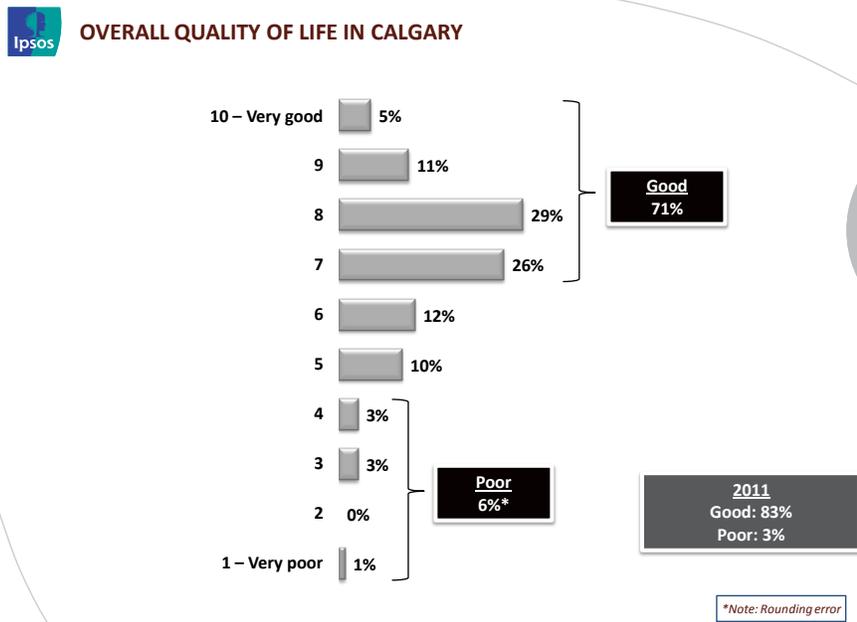
Views about The City of Calgary Overall

Overall Quality of Life in Calgary

The City of Calgary offers a good quality of life overall.

Seven-in-ten (71%) citizens assess the quality of life in Calgary as good (e.g., provide a rating of 7, 8, 9, or 10 on a 10-point scale where 10 represents “very good” and 1 represents “very poor”). Only 6% rate Calgary’s quality of life poorly.

Directional comparisons suggest the percentage saying Calgary offers a good quality of life has dropped significantly since 2011.



Base: All Respondents (n=503)
 Q11: On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good” how would you rate the overall quality of life in the city of Calgary today?

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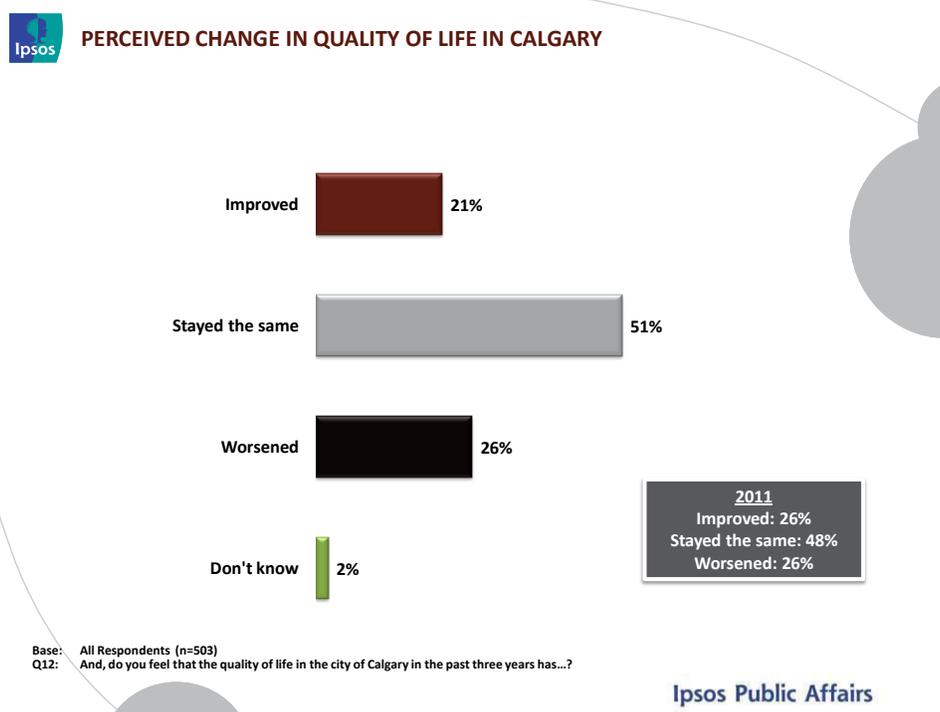
Citizens who are *more* likely to say Calgary offers a **good** quality of life include:

- Those with some post-secondary education (76%, compared to a low of 60% among those with a high school education or less);
- Those who feel Calgary’s quality of life has “improved” over the past three years (93%, compared to 75% of those who feel the quality of life has “stayed the same” and 46% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (81%, compared to 19% of those rating the quality of services as “very poor/poor”);
- Those who are satisfied with the overall quality of City services (92%, compared to 44% of those who describe their satisfaction as average and 13% of dissatisfied respondents);
- Those who feel they receive good value for their property taxes (95%, compared to 63% describing this as average and 42% who feel they receive poor value for the taxes they pay);
- Those who are satisfied with their most recent City contact experience (78%, compared to 40% of those who are dissatisfied);
- Those who feel they receive “just the right amount” of information from The City (85%, compared to 61% of those who feel they receive “too little” information);
- Those who have a predominately favourable impression of The City overall (86%, compared to 62% of those with a neutral impression and 36% of those with a mainly unfavourable impression); and,
- Those who trust The City “a great deal” or “a little” (93% and 88%, respectively, compared to a low of 36% among those who “distrust The City a great deal”).

Perceived Change in Quality of Life in Calgary

One-half say the quality of life in Calgary has stayed the same over the past three years.

When asked how the quality of life in Calgary has changed over the past three years, 21% say it has “improved” and 26% say it has “worsened”; another 51% say it has “stayed the same”. This translates into a net momentum score (improved-worsened) of -5 points, indicating that quality of life has deteriorated for some citizens over the past three years.



Citizens who are *more* likely to report an **improving** quality of life include:

- Those who are 55 years of age or older (28%, compared to a low of 17% among 35 to 54 year olds);
- Those who have lived in Calgary for 6 to 10 years (34%, compared to a low of 19% among those who have lived in the area for more than 20 years);
- Those who are satisfied with the overall quality of City services (30%, compared to 6% of those who describe their satisfaction as average and 8% of dissatisfied respondents);
- Those who feel they receive good value for their property taxes (33%, compared to 16% describing this as average and 9% who feel they receive poor value for the taxes they pay);
- Those who feel they receive “just the right amount” of information from The City (32%, compared to 14% of those who feel they receive “too little” information);
- Those who have a predominately favourable impression of The City overall (30%, compared to

13% of those with a neutral impression and 7% of those with a mainly unfavourable impression); and,

- Those who “trust The City a great deal” (47%, compared to a low of 8% among those who “distrust The City a great deal”).

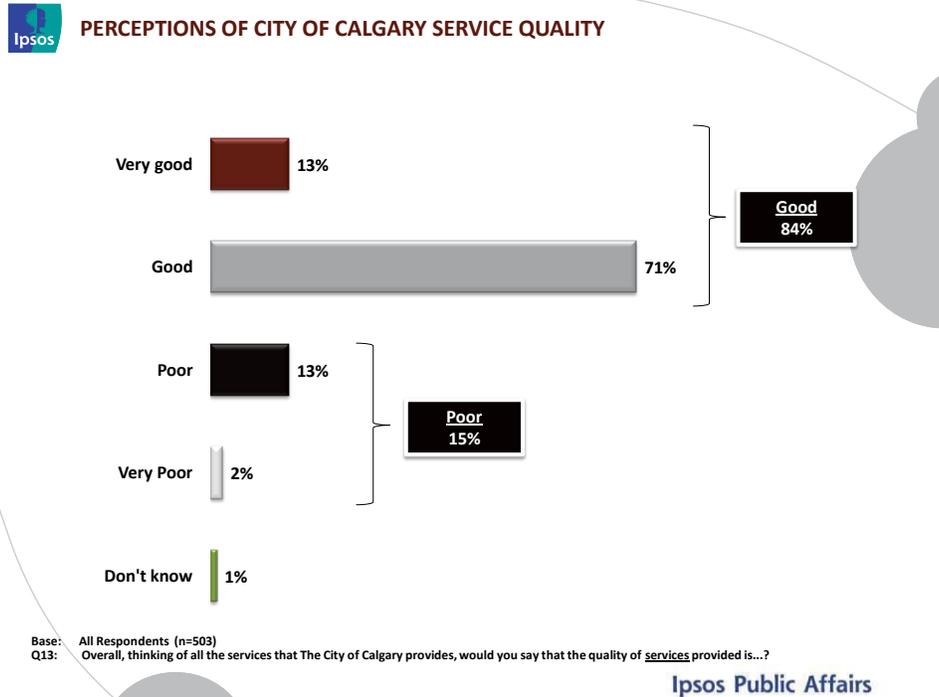
Citizens who are *more* likely to report a **worsening** quality of life include:

- Those who are 35 to 54 years of age (32%, compared to a low of 18% among 18 to 34 year olds);
- Those who are responsible for paying property taxes or rent (28%, compared to 10% who are not responsible for these payments);
- Those who rate the quality of City services as “very poor/poor” (52%, compared to 21% of those rating the quality of services as “very good/good”);
- Those who rate their satisfaction with the overall quality of City services as not satisfied or average (56% and 41%, respectively, compared to 14% of satisfied respondents);
- Those who feel they receive poor value for their property taxes (52%, compared to 28% describing this as average and 8% who feel they receive poor value for the taxes they pay);
- Those who are not satisfied with their most recent City contact experience (39%, compared to 24% of those who are satisfied);
- Those who feel they receive “too little” information from The City (37%, compared to 14% of those who feel they receive “just the right amount” of information);
- Those who have a predominately unfavourable impression of The City overall (59%, compared to 28% of those with a neutral impression and 14% of those with a mainly favourable impression); and,
- Those who distrust The City either “a great deal” or “a little” (59% and 43%, respectively, compared to a low of 6% among those who “trust The City a great deal”).

Perceptions of City of Calgary Service Quality

Most citizens have a favourable impression of the overall quality of City services.

More than eight-in-ten (84%) citizens rate the overall quality of City services as “very good” or “good”. This includes 13% saying “very good”. A total of 15% rate the quality of City services poorly.



Citizens who are *more* likely to rate The City’s overall service quality as **“very good”** or **“good”** include:

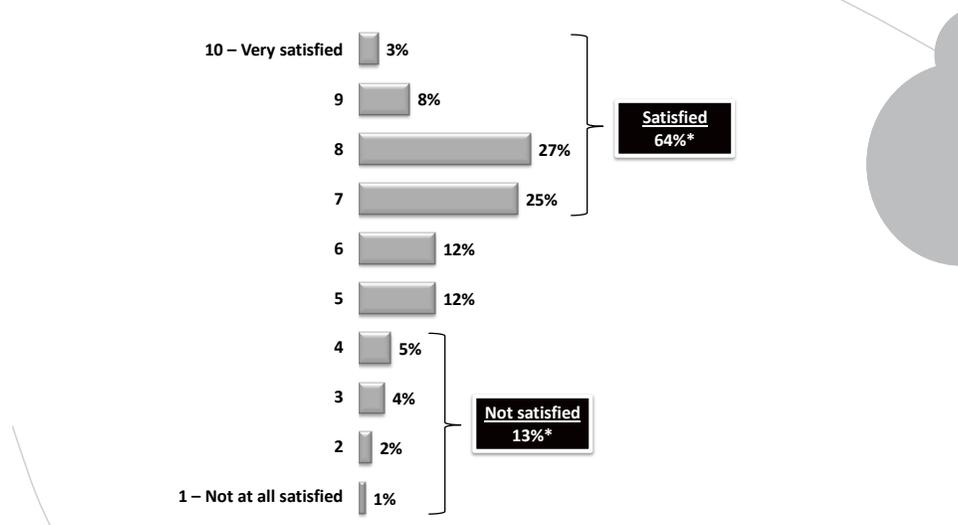
- Those who are 55 years of age or older (88%, compared to a low of 81% among 35 to 54 year olds);
- Those with some post-secondary education (89%, compared to a low of 72% among those with a high school education or less);
- Those living in single-person households (94%, compared to 79% of those in two-person households and 83% of those in households with three or more people);
- Those who are satisfied with the overall quality of City services (97%, compared to 86% of those who describe their satisfaction as average and 16% of dissatisfied respondents);
- Those who are satisfied with their most recent City contact experience (90%, compared to 54% of those who are dissatisfied); and,
- Those who feel they receive “just the right amount” of information from The City (95%, compared to 78% of those who feel they receive “too little” information).

Citizen Satisfaction with Overall Level and Quality of Service and Programs Provided by The City of Calgary

Nearly two-thirds are satisfied with the overall level and quality of services and programs provided by The City of Calgary.

In total, 64% of citizens are satisfied (e.g., provide a rating of 7, 8, 9, or 10 on a 10-point scale where 10 represents “very satisfied” and 1 represents “not at all satisfied”) with the overall level and quality of services and programs provided by The City of Calgary. Conversely, 13% are not satisfied with The City’s overall level and quality of services and programs.

CITIZEN SATISFACTION WITH OVERALL LEVEL AND QUALITY OF SERVICE AND PROGRAMS PROVIDED BY THE CITY OF CALGARY



Base: All Respondents (n=503)
 Q14: On a scale of “1” to “10” where “1” represents “not at all satisfied” and “10” represents “very satisfied”, how satisfied are you with the overall level and quality of service and programs provided by The City of Calgary?

**Note: Rounding error*

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Citizens who are *more* likely to be **satisfied** with the overall level and quality of City services and programs include:

- Those with some post-secondary education (71%, compared to a low of 53% among those with a high school education or less);
- Those with household incomes of less than \$60,000 (74%, compared to a low of 58% among those earning \$120,000 or more);
- Those who feel Calgary’s quality of life has “improved” over the past three years (88%, compared to 68% of those who feel the quality of life has “stayed the same” and 35% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (74%, compared to 10% of those rating the quality of services as “very poor/poor”);
- Those who feel they receive good value for their property taxes (95%, compared to 52% describing this as average and 28% who feel they receive poor value for the taxes they pay);
- Those who are satisfied with their most recent City contact experience (73%, compared to 36% of those who are dissatisfied); and,
- Those who feel they receive “just the right amount” of information from The City (78%, compared to 53% of those who feel they receive “too little” information).

Satisfaction with The City of Calgary’s Delivery of Services

Satisfaction with specific City of Calgary services varies.

When asked to rate their satisfaction with specific services provided by The City of Calgary, citizens indicate they are satisfied with most of these services although clearly some are more satisfactory than others.

Overall, citizens are most satisfied with the following six services:

- “Protective Services including the Fire Department and Police” (88% satisfied, including 43% “very satisfied”).
- “The quality of drinking water” (85% satisfied, including 51% “very satisfied”).
- “City operated parks, pathways systems, and open spaces” (83% satisfied, including 33% “very satisfied”).
- “Waste management services including residential garbage collection and recycling programs” (75% satisfied, 33% including “very satisfied”).
- “City operated recreation programs and facilities” (75% satisfied, including 19% “very satisfied”).
- “Animal and Bylaw services” (68% satisfied, including 19% “very satisfied”).

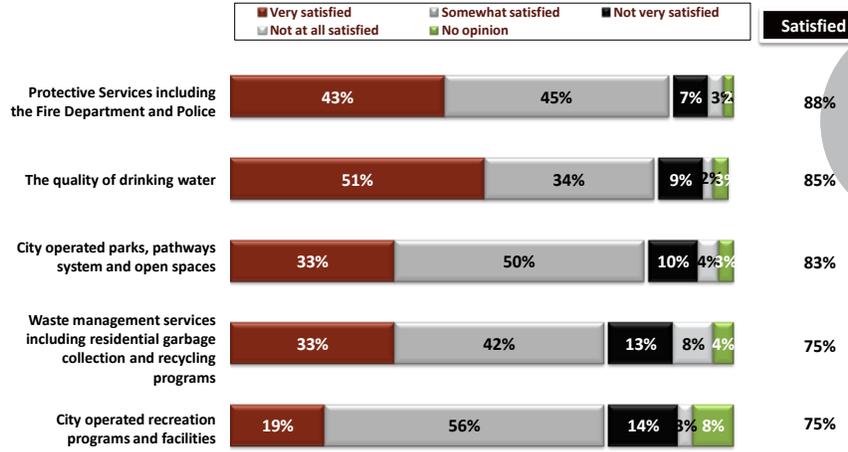
Opinion is mixed when it comes to the following three services, although the data suggests this may in part be due to a general lack of familiarity rather than actual dissatisfaction in some instances.

- “City-operated public transit including the LRT and buses” (53% satisfied, 40% not satisfied, 7% no opinion).
- “City services to support diverse groups including seniors, at risk youth, and other groups including new Canadians and those living with disabilities” (53% satisfied, 24% not satisfied, 24% no opinion).
- “City land use, planning, and development (52% satisfied, 39% not satisfied, 8% no opinion).

Citizens are less satisfied with “transportation services including City operated roads, infrastructure, and traffic flow” (43% satisfied, 54% not satisfied).



SATISFACTION WITH THE CITY OF CALGARY'S DELIVERY OF SERVICES

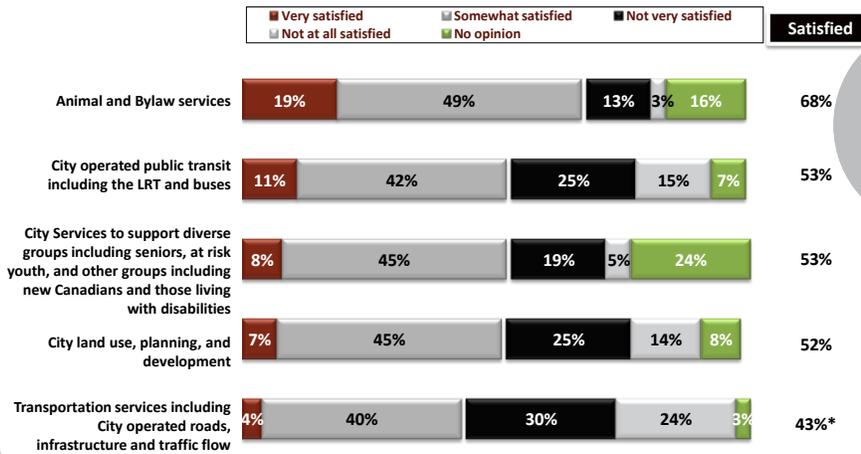


Base: All Respondents (n=503)
 Q15: Next is a short list of programs and services provided to you by The City of Calgary. Please tell us how satisfied you are with the job The City is doing in providing that program or service. Our scale is very satisfied, somewhat satisfied, not very satisfied or not at all satisfied. Please try as best as possible to provide a response using the scale and if you have absolutely no opinion on a particular service, please indicate so accordingly.

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SATISFACTION WITH THE CITY OF CALGARY'S DELIVERY OF SERVICES (continued)



Base: All Respondents (n=503)
 Q15: Next is a short list of programs and services provided to you by The City of Calgary. Please tell us how satisfied you are with the job The City is doing in providing that program or service. Our scale is very satisfied, somewhat satisfied, not very satisfied or not at all satisfied. Please try as best as possible to provide a response using the scale and if you have absolutely no opinion on a particular service, please indicate so accordingly.

*Note: Rounding error

Ipsos Public Affairs

Analysis by key socio-demographic subgroups reveals that citizens who are *more* likely to be **satisfied** (combined “very/somewhat satisfied” mentions) with these services include:

- Those who feel Calgary’s quality of life has “improved” or “stayed the same” over the past three years;
- Those who rate the quality of City services as “very good/good”;
- Those who are satisfied with the overall quality of City services;
- Those who feel they receive good value for their property taxes;
- Those who are satisfied with their most recent City contact experience; and,
- Those who feel they receive “just the right amount” of information from The City.

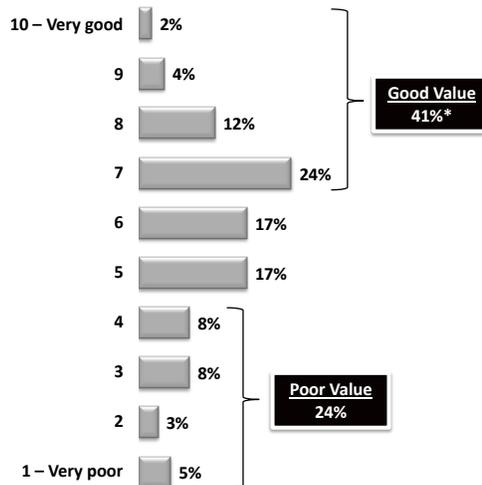
Value for Money

Four-in-ten Calgarians believe they receive good value for their municipal tax dollars.

Overall, 41% of citizens say they receive good value (e.g., provided a rating of 7, 8, 9, or 10 on a 10-point scale where 10 represents “very good value” and 1 represents “very poor value”) for the taxes they pay to The City of Calgary. One-quarter (24%) provide a poor value for money rating.



VALUE FOR MONEY



Base: All Respondents (n=503)

Q16: Your property tax dollars are divided between The City and the Province. In Calgary, approximately half of your property tax bill goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars using a scale of “1” to “10” where “1” represents “very poor value” and “10” represents “very good value.”

*Note: Rounding error

Ipsos Public Affairs

Citizens who are *more* likely to say they receive **good value** for their municipal tax dollars include:

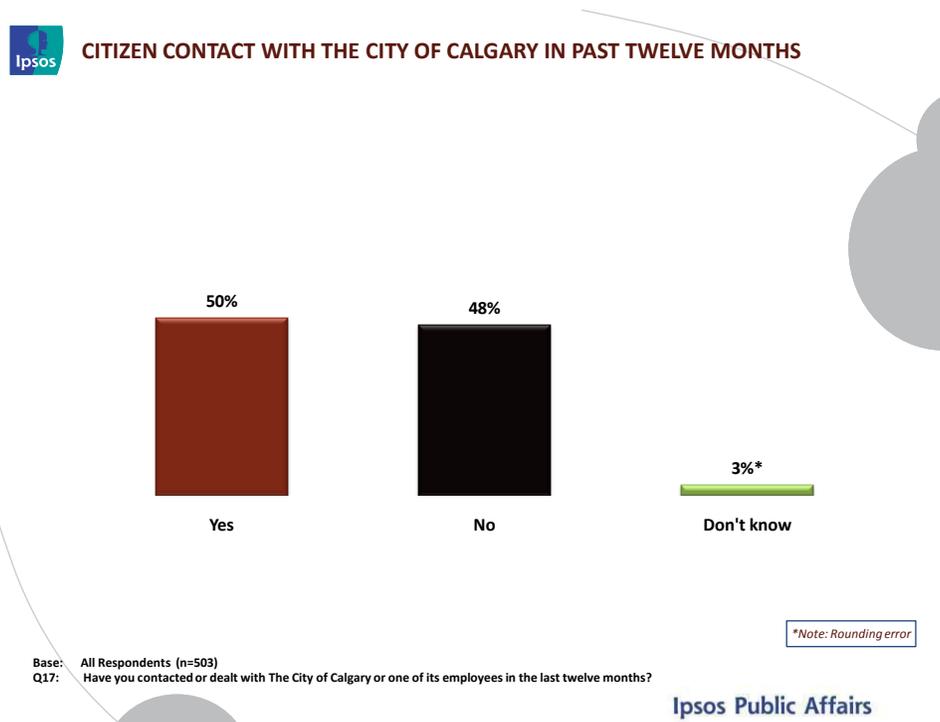
- Those who are 55 years of age or older (52%, compared to a low of 38% among 35 to 54 year olds);
- Those with some post-secondary education (47%, compared to a low of 28% among those with a high school education or less);
- Homeowners (46%, compared to 32% of renters);
- Those who feel Calgary’s quality of life has “improved” over the past three years (65%, compared to 46% of those who feel the quality of life has “stayed the same” and 13% of those who feel it has “worsened”);
- Those who rate the quality of City services as “very good/good” (48%, compared to 6% of those rating the quality of services as “very poor/poor”);
- Those who are satisfied with the overall quality of City services (62%, compared to 8% of those who describe their satisfaction as average and 0% of dissatisfied respondents);
- Those who are satisfied with their most recent City contact experience (49%, compared to 22% of those who are dissatisfied);
- Those who feel they receive “just the right amount” of information from The City (56%, compared to 30% of those who feel they receive “too little” information);
- Those who have a predominately favourable impression of The City overall (59% compared to 28% of those with a neutral impression and 3% of those with a mainly unfavourable impression); and,
- Those who trust The City “a great deal” or “a little” (65% and 66%, respectively, compared to a low of 6% among those who “distrust The City a great deal”).

City Communications

Citizen Contact with The City of Calgary in Past Twelve Months

One-half of citizens contacted or dealt with The City of Calgary in the last twelve months.

In total, 50% of citizens contacted or dealt with The City of Calgary or one of its employees in the last twelve months.



Citizens who are *more* likely to have **contacted or dealt** with The City of Calgary include:

- University graduates (57%, compared to a low of 43% among those with some post-secondary education);
- Those with household incomes of \$120,000 or more (58%, compared to a low of 41% among those earning less than \$60,000);
- Those who feel Calgary’s quality of life has “worsened” or “improved” over the past three years (59% and 57%, respectively, compared to 42% of those who feel the quality of life has “stayed the same”);
- Those who rate the quality of City services as “very poor/poor” (71%, compared to 46% of those rating the quality of services as “very good/good”);
- Those who are dissatisfied with the overall quality of City services (75%, compared to 41% of those who describe their satisfaction as average and 48% of satisfied respondents).

Further analysis suggests that **contact** with The City is also *more* common among:

- Those who either trust or distrust The City (in comparison, those who feel neutral are less likely to have contacted The City); and,
- Those who would either advocate for or be critical of The City (in comparison, those who feel neutral are less likely to have contacted The City).

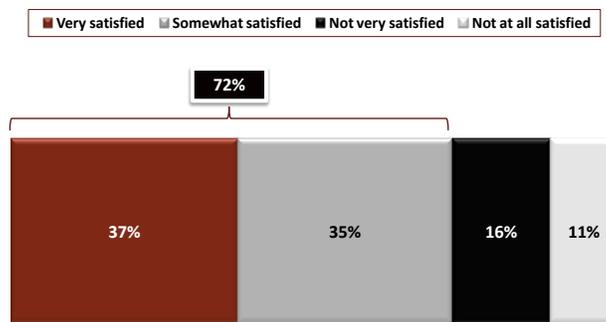
Satisfaction with City Contact Experience

Contact experiences are predominately positive.

Nearly three-quarters (72%) of those who contacted The City in the last 12 months are satisfied with their most recent City contact experience. This includes 37% saying they are “very satisfied”. Conversely, 27% are not satisfied with their most recent contact with The City.



SATISFACTION WITH CITY CONTACT EXPERIENCE



Base: Respondents who have had contact with The City of Calgary in the last twelve months (n=249)
Q18: How satisfied were you with your most recent contact with The City? Were you...

Ipsos Public Affairs

Citizens who are *more* likely to be **satisfied** (combined “very/somewhat satisfied” mentions) with their most recent City contact experience include:

- Those who have lived in Calgary for more than 20 years (82%, compared to a low of 62% among those who have lived in the area for 11 to 20 years); and,
- Those who feel they receive “just the right amount” of information from The City (86%, compared to 63% of those who feel they receive “too little” information).

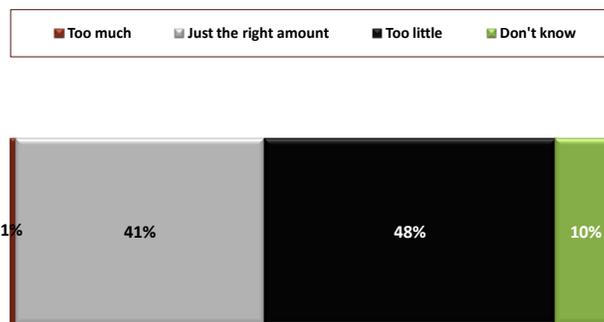
Perception of Information Received from City

Nearly one-half of all citizens think they receive too little information from The City.

In total, 48% of citizens think they receive “too little” information from The City. Another 41% say they receive “just the right amount” of information; very few (1%) describe the level of City information as “too much”.



PERCEPTION OF INFORMATION RECEIVED FROM CITY



Base: All Respondents (n=503)
Q19: In your opinion, do you currently receive too much, too little, or just the right amount of information from The City?

Ipsos Public Affairs

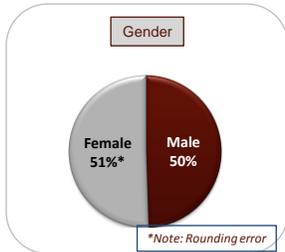
Respondents who are *more* likely to say they receive **too little** information from The City include:

- Those with household incomes of \$60,000 to less than \$90,000 or \$120,000 or more (60% and 54%, respectively, compared to a low of 35% among those earning \$90,000 to less than \$120,000);
- Those who feel Calgary’s quality of life has “worsened” over the past three years (69%, compared to 44% of those who feel the quality of life has “stayed the same” and 32% of those who feel it has “improved”);
- Those who rate the quality of City services as “very poor/poor” (68%, compared to 44% of those rating the quality of services as “very good/good”);
- Those who are not satisfied with the overall quality of City services (78%, compared to 55% of those who describe their satisfaction as average and 39% of satisfied respondents);
- Those who feel they receive poor value for their property taxes (66%, compared to 50% describing this as average and 35% who feel they receive good value for the taxes they pay);
- Those who are not satisfied with their most recent City contact experience (68%, compared to 46% of those who are satisfied);
- Those who have a predominately unfavourable or neutral impression of The City overall (69% and 55%, respectively, compared to 38% of those with a mainly favourable impression);
- Those who “distrust The City a great deal” (81%, compared to a low of 26% among those who “trust The City a great deal”); and,
- Those who would be critical of The City (70%, compared to 44% of those with a neutral opinion and 34% of those who would advocate for The City).

Demographics

The charts below show key socio-demographic variables by which the data were analyzed (Base: Valid Respondents).

DEMOGRAPHICS

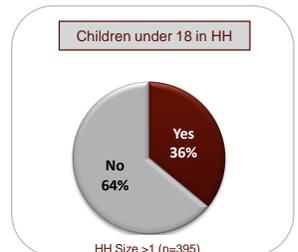


Age Group	Percentage
18-24	5%
25-34	30%
35-44	17%
45-54	24%
55-64	12%
65 or more	10%
Prefer not to answer	2%
Mean	43.1

Education Level	Percentage
Completed high school or less	15%
Some post secondary or completed a college diploma	40%
Completed university degree or post-grad degree	44%
Prefer not to answer	1%

Household Income	Percentage
Less than \$30,000	5%
\$30,000 to just under \$45,000	7%
\$45,000 to just under \$60,000	10%
\$60,000 to just under \$75,000	12%
\$75,000 to just under \$90,000	10%
\$90,000 to just under \$105,000	10%
\$105,000 to just under \$120,000	7%
\$120,000 to just under \$135,000	5%
\$135,000 to just under \$150,000	6%
\$150,000 and over	8%
Prefer not to answer	21%

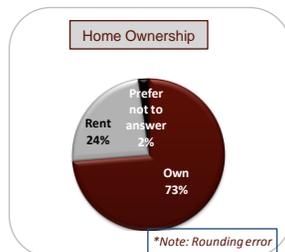
Number of People	Percentage
1	23%
2	35%
3	18%
4	16%
5	5%
6	1%
8	1%
10	1%
Prefer not to answer	1%



Base: All Respondents (n=503)

Ipsos Public Affairs

DEMOGRAPHICS



Type of Home	Percentage
Apartment	12%
Townhouse	8%
Condominium	12%
Single-detached house	58%
Duplex-attached house	7%
Another type of multi-dwelling unit	2%
Prefer not to answer	1%

Base: All Respondents (n=503)

Ipsos Public Affairs

Appendix: Survey Questionnaire

The City of Calgary 2012 Onward & Corporate Branding Research

CORTEX SCREENERS

AGE

[Numeric Field PREQUAL]

What is your age?

[PN: THANK AND TERMINATE IF UNDER 18]

GENDER

[Single Punch PREQUAL]

What is your gender?

A1 Male

A2 Female

EN01CTY

[Single Punch PREQUAL]

In what country do you live?

A1 USA

A2 Canada

A3 Australia

A4 United Kingdom

A5 Other

[PN: THANK AND TERMINATE IF NOT A2]

CAPROV1**[Single Punch PREQUAL]****Which of the following provinces do you live in?**

- A1 Newfoundland and Labrador**
- A2 Prince Edward Island**
- A3 Nova Scotia**
- A4 New Brunswick**
- A5 Quebec**
- A6 Ontario**
- A7 Manitoba**
- A8 Saskatchewan**
- A9 Alberta**
- A10 British Columbia**
- A11 Yukon Territory**
- A12 Northwest Territories**
- A13 Nunavut**

[PN: THANK AND TERMINATE IF NOT A9]**Industry Security Screener****IND10US****[Multi-Punch PREQUAL]**

In which industries or professions do you, or any member of your immediate household, work? Please select all that apply.

- A1 Advertising/Public Relations**
- A2 Automotive**
- A3 Beauty/Cosmetics**

- A4 Education**
- A5 Electronics/Computer/Software**
- A6 Fashion/Clothing**
- A7 Financial Services/Insurance**
- A8 Food/Beverages**
- A9 Government/Politics**
- A10 Grocery/Convenience/Department Stores**
- A11 Healthcare/Pharmaceuticals**
- A12 Internet/E-Commerce**
- A13 Management Consulting**
- A14 Marketing/Market Research**
- A15 Movie Studio**
- A16 Movie Theater or Theater Chain**
- A17 Music**
- A18 Personal Care/Toiletries**
- A19 Pets (Grooming, Veterinary, Retail, Training)**
- A20 Publishing (Newspaper, Magazines, Books)**
- A21 Radio**
- A22 Real Estate/Construction**
- A23 Restaurants**
- A24 Sales/Sales Promotion**
- A25 Sports**
- A26 Telecommunications (phone, cell phone, cable)**
- A27 Television (Studio/Network/Cable/Satellite)**
- A28 Toys**
- A29 Transportation/Shipping**
- A30 Travel/Tourism**
- A31 Video Games**

A32 Other Entertainment

A33 None of the above

[PN: IF A1, A14, A20, OR A27, then thank and terminate]

S1: In addition to previously stated industries, do you or does anyone in your household work for:

The City of Calgary?

Yes

No

[PN: If yes, then thank and terminate].

S2: Do you live within The City of Calgary city limits?

Yes

No

[PN: If No, then thank and terminate]

Main Q're begins

INTRODUCTION

(INSERT STANDARD IPSOS REID PANEL GREETING)

The information from this survey is collected under the authority of the Freedom of Information and Protection of Privacy Act, Section 33(c) and is used to provide guidance to The City of Calgary when it comes to making decisions regarding civic services. For additional information, please contact The City of Calgary at 3-1-1 and specifically mention the “2012 CSC Survey”.

S3. What Calgary community do you currently live in? [DROP DOWN BOX]**(PN: Please alphabetize. Keep “Other” at the end of the list)**

ABBEYDALE

ACADIA

ALBERT PARK/ RADISSON HEIGHTS

ALTADORE

APPLEWOOD PARK

ARBOUR LAKE

ASPEN WOODS

AUBURN BAY

BONAVISTA DOWNS

BEDDINGTON HEIGHTS

BEL-AIRE

BELTLINE

BANFF TRAIL

BANKVIEW

BOWNESS

BRAESIDE

BRIDGELAND/RIVERSIDE

BRENTWOOD

BRIDLEWOOD

BRITANNIA

BAYVIEW

CAMBRIAN HEIGHTS

CANYON MEADOWS

CAPITOL HILL

CASTLERIDGE

CEDARBRAE

CFB - CURRIE

CFB – LINCOLN PARK

COUGAR RIDGE

CHAPARRAL

CHINOOK PARK

CHINATOWN

CHRISTIE PARK

COUNTRY HILLS VILLAGE

CHARLESWOOD

CITADEL

CLIFF BUNGALOW

COACH HILL

COLLINGWOOD

CORAL SPRINGS

COUNTRY HILLS

COVENTRY HILLS

COPPERFIELD

CRANSTON

CRESCENT HEIGHTS

CRESTMONT

DALHOUSIE

DOUGLASDALE/GLEN ESTATES

DIAMOND COVE

DISCOVERY RIDGE

DOWNTOWN COMMERCIAL CORE

DOWNTOWN EAST VILLAGE

DOWNTOWN WEST END

DOVER

DEER RIDGE

DEER RUN

EAGLE RIDGE

EAU CLAIRE
EDGEMONT
ELBOW PARK
ERIN WOODS
ERLTON
EVERGREEN
EVANSTON
ELBOYA
FAIRVIEW
FALCONRIDGE
FOREST HEIGHTS
FOREST LAWN
GLENBROOK
GLENDALE
GLAMORGAN
GREENWOOD/GREENBRIAR
GREENVIEW
HAMPTONS
HARVEST HILLS
HAWKWOOD
HAYSBORO
HIDDEN VALLEY
HILLHURST
HIGHWOOD
HOUNSFIELD HEIGHTS/BRIAR HILL
HIGHLAND PARK
HUNTINGTON HILLS
INGLEWOOD
KINCORA
KELVIN GROVE
KILLARNEY/GLENGARRY

KINGSLAND

LEGACY

LAKE BONAVIDA

LAKEVIEW

LOWER MOUNT ROYAL

LINCOLN PARK

MACEWAN GLEN

MAYFAIR

MAHOGANY

MAYLAND HEIGHTS

MANCHESTER

MCKENZIE LAKE

MCKENZIE TOWNE

MEADOWLARK PARK

MIDNAPORE

MISSION

MILLRISE

NOLAN HILL

MONTGOMERY

MOUNT PLEASANT

MONTEREY PARK

MARLBOROUGH PARK

MAPLE RIDGE

MARLBOROUGH

MARTINDALE

NEW BRIGHTON

NORTH GLENMORE PARK

NORTH HAVEN UPPER

NORTH HAVEN

OAKRIDGE

OGDEN

PALLISER

PANORAMA HILLS

PATTERSON

PENBROOKE MEADOWS

PINERIDGE

PARKDALE

PARKHILL/STANLEY PARK

PARKLAND

POINT MCKAY

PUMP HILL

QUEENSLAND

QUEENS PARK VILLAGE

RAMSAY

RANCLANDS

ROSSCARROCK

ROSEDALE

RED CARPET/MOUNTVIEW MOBILE PARK

RENFREW

RICHMOND

RIDEAU PARK

RIVERBEND

ROSEMONT

ROCKY RIDGE

ROXBORO

ROYAL OAK

REDSTONE

RUNDLE

RUTLAND PARK

ROYAL VISTA

SADDLE RIDGE

SANDSTONE VALLEY

SCARBORO
SCENIC ACRES
SUNDANCE
SETON
SAGE HILL
SHAGANAPPI
SHAWNESSY
SHAWNEE SLOPES
SHERWOOD
SIGNAL HILL
SILVER SPRINGS
SKYVIEW RANCH
SUNALTA
SOUTH CALGARY
SOMERSET
SOUTHVIEW
SOUTHWOOD
SPRINGBANK HILL
SPRUCE CLIFF
SUNNYSIDE
SCARBORO/SUNALTA WEST
ST. ANDREWS HEIGHTS
STRATHCONA PARK
SILVERADO
TARADALE
TEMPLE
THORNCLIFFE
TUSCANY
TUXEDO PARK
UPPER MOUNT ROYAL
UNIVERSITY HEIGHTS

UNIVERSITY OF CALGARY

VALLEY RIDGE

VARSITY

VISTA HEIGHTS

WALDON

WOODBINE

WESTGATE

WHITEHORN

WEST HILLHURST

WILLOW PARK

WINSTON HEIGHTS/MOUNTVIEW

WILDWOOD

WINDSOR PARK

WOODLANDS

WEST SPRINGS

OTHER

[PN: FOR THE FOLLOWING STATEMENT, PLEASE HAVE SEPARATE SCREEN]

For the purpose of this survey, when we refer to The City of Calgary, this means the Council and City administration as well as all of the City programs and services it provides.

SECTION A: ORGANIZATIONAL ATTRIBUTES & IPSOS REPUTATION MODEL

1. To begin, we'd like you to start off by describing The City of Calgary. Like many organizations, The City of Calgary has traits and characteristics, some may be positive and some may be less positive. Please provide us with as many words and/or phrases to describe The City of Calgary.

Please be detailed and specific in your response

[VERBATIM RESPONSE] – PLEASE INCLUDE SPACE VALIDATION

2. Please indicate how well you feel you know The City of Calgary, taking into account all the ways you have learned about or had contact with it. Would you say that you know The City of Calgary...?

Please select one response only

Very well
Somewhat well
Just a little
Heard of, but know almost nothing
Never heard of it
Don't know

3. Taking into account all of the things which you think are important, how favourable or unfavourable is your overall opinion or impression of The City of Calgary?

Please select one response only

Very favourable
Mainly favourable
Neutral
Mainly unfavourable
Very unfavourable
Never heard of this organization
Don't know

Trust

- 4. Again, taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?**

Please select one response only

Trust a great deal
Trust a little
Neutral
Distrust a little
Distrust a great deal
Never heard of this organization
Don't know

Advocacy

- 5. Which one of the following statements best reflects your overall opinion and perceptions of The City of Calgary?**

Please select one response only

I think so well of them I would speak highly of them without being asked
I would speak highly of them if someone asked my opinion
On balance, I have a neutral opinion of them, seeing both positives and negatives
I would be critical of them if someone asked my opinion
I think so poorly of them, I would be critical without being asked
I don't know enough about them to have a strong opinion.

- 6. For each of the following statements, please tell us whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree that the statement accurately describes The City of Calgary.**

Please select one response only

[ACROSS TOP OF GRID]

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Don't know

[DOWN SIDE OF GRID. RANDOMIZE ORDER]**The City of Calgary...**

Does what's best for its citizens
Stands for Calgary values

Is customer-focused
Cares about the local community
Keeps its promises
Works hard to get things done for citizens
Is proactive about meeting the needs of citizens
Is a good place to work

7. Next, we'd like to you to read the following statements, which may or may not describe The City of Calgary today. For each statement, please indicate whether you agree or disagree that the statement reflects how you feel about The City of Calgary TODAY and then please also indicate how likely it is that The City of Calgary will represent this statement INTO THE FUTURE?

[SCALE IN DROP DOWN BOX]

[Column A]: Reflects The City of Calgary TODAY

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree

[Column B]: How likely is The City of Calgary to achieve this in the future?

Very likely
Somewhat likely
Somewhat unlikely
Very unlikely

[DOWNSIDE OF GRID. RANDOMIZE ORDER] [SPLIT IN TWO SCREENS AND RANDOMIZE STATEMENTS]

Communicates with citizens about the reasons why they make decisions
Has a consistent approach to how it communicates with citizens about programs and services
Is developing long-term visions for Calgary
Uses long-term visions as a guide to make decisions
Provides programs and services that are based on long-term visions for Calgary
Helps citizens understand how tax dollars are being spent
Makes spending decisions that are linked to long-term visions for Calgary
Can be trusted to make decisions so that Calgary achieves its long-term visions
Is transparent in its decision-making
Is easy to do business with

- Allows citizens to have meaningful input into decision-making
- Helps citizens understand their role in ensuring that Calgary achieves its long-term visions
- Helps citizens understand the City programs and services that are available
- Communicates with citizens in a consistent way
- Communicates with citizens in a simplified way
- Communicates with citizens that all City programs and services are connected

SECTION B: RELATIONSHIP/EXPECTATIONS

- 8. Next, we are going to show a list of possible priorities for The City of Calgary to focus on. And we'd like you to tell us if each one is very important, somewhat important, not very important, or not at all important in your view for The City of Calgary.**

Please select one response only

[ACROSS TOP OF GRID]

Very important
Somewhat important
Not very important
Not at all important
Don't know

[DOWN SIDE OF GRID. RANDOMIZE ORDER.]

Working with other organisations and levels of government to improve quality and access to services and quality of life
Working to establish a healthy, independent and safe way of life for all
Working closely with all sectors of the community, helping them to get involved in life in Calgary
Safeguarding and strengthening Calgary's environment
Focusing on delivering core services to city residents

- 9. How successful or unsuccessful would you say The City of Calgary is in each of the following areas...?**

Please select one response only

[ACROSS TOP OF GRID]

Very successful
Somewhat successful
Somewhat unsuccessful
Very unsuccessful
Don't know

[DOWN SIDE OF GRID. RANDOMIZE ORDER.]

Working with other organisations and levels of government to improve quality and access to services and quality of life
Working to establish a healthy, independent and safe way of life for all
Working closely with all sectors of the community, helping them to get involved in life in Calgary
Safeguarding and strengthening Calgary's environment
Focusing on delivering core services to city residents

10. For each item below, please indicate whether you agree or disagree that this is a value reflected by The City of Calgary TODAY.

Please select one response only

[ACROSS TOP OF GRID]

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Don't know

[DOWN SIDE OF GRID. RANDOMIZE ORDER.]

Honesty
Excellence
Accountability
Responsiveness
Treating others with respect

SECTION C: VIEWS ON THE CITY OF CALGARY OVERALL

11. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good” how would you rate the overall quality of life in the city of Calgary today?

Please select one response only

1 – very poor
2
3
4
5
6
7
8
9
10 – very good

12. And, do you feel that the quality of life in the city of Calgary in the past three years has?

Please select one response only

Improved
Stayed the Same

Worsened
Don't know

SECTION D: QUALITY OF CIVIC SERVICES

The City of Calgary provides a variety of services including police, fire, transit, recreation, parks, roads, water and sewer as well as community planning and social development.

[ROTATE ORDER OF Q13 AND Q14]

13. Overall, thinking of all the services that The City of Calgary provides, would you say that the quality of services provided is...?

Please select one response only

Very good
Good
Poor
Very poor
Don't know

14. On a scale of “1” to “10” where “1” represents “not at all satisfied” and “10” represents “very satisfied”, how satisfied are you with the overall level and quality of service and programs provided by The City of Calgary?

Please select one response only

1 – not at all satisfied
2
3
4
5
6
7
8
9
10 – very satisfied

15. Next is a short list of programs and services provided to you by The City of Calgary. Please tell us how satisfied you are with the job The City is doing in providing that program or service. Our scale is very satisfied, somewhat satisfied, not very satisfied or not at all satisfied. Please try as best as possible to provide a response using the scale and if you have absolutely no opinion on a particular service, please indicate so accordingly.

Please select one response only

[ACROSS TOP OF GRID]

Very satisfied
Somewhat satisfied
Not very satisfied
Not at all satisfied
I have absolutely no opinion

[DOWN SIDE OF GRID. RANDOMIZE ORDER.]

Protective Services including the Fire Department and Police
Transportation services including City operated roads, infrastructure and traffic flow
City operated public transit including the LRT and buses
Waste management services including residential garbage collection and recycling programs
City operated parks, pathways system and open spaces
City operated recreation programs and facilities
City land use, planning, and development
The quality of drinking water
Animal and Bylaw services
City Services to support diverse groups including seniors, at risk youth, and other groups including new Canadians and those living with disabilities.

SECTION E: LEVELS AND SERVICES OF TAXATION

16. Your property tax dollars are divided between The City and the Province. In Calgary, approximately half of your property tax bill goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars using a scale of “1” to “10” where “1” represents “very poor value” and “10” represents “very good value.”

Please select one response only

1 – very poor value
2
3
4
5
6
7
8
9
10 – very good value

[ASK ALL]

SECTION F: CITY CONTACT AND COMMUNICATION

Now we'd like you to think about any contact you've had with The City of Calgary in the past year. This includes letters you may have received from The City, visiting The City of Calgary website, speaking with a City of Calgary representative over the telephone and any other ways you may have dealt with The City. Keeping this in mind...

17. Have you contacted or dealt with The City of Calgary or one of its employees in the last twelve months?

Please select one response only

- Yes
- No
- Don't know

18. How satisfied were you with your most recent contact with The City? Were you...

Please select one response only

- Very satisfied
- Somewhat satisfied
- Not very satisfied
- Not at all satisfied
- Don't know

19. In your opinion, do you currently receive too much, too little, or just the right amount of information from The City?

Please select one response only

- Too much
- Too little
- Just the right amount
- Don't know

SECTION G: DEMOGRAPHICS

We are almost finished. We are now going to ask you some demographic questions that allow us to group responses and to sort the information we collect. All your responses will be held in strict confidence and will not be attributed to you.

20. In what year were you born?

DROP-DOWN BOX [RANGE 1900 TO 1991]
Prefer not to answer [BELOW DROP-DOWN BOX]

21. How many people, including yourself, live in your household?

DROP-DOWN BOX [RANGE: 1 to 10]

Prefer not to answer [BELOW DROP-DOWN BOX]

[IF 2 OR MORE IN Q21 ASK Q22]

22. Do you have any children under the age of 18 living in your household?

Please select one response only

Yes

No

[ASK ALL]

23. Are you either primarily or jointly responsible for paying property taxes or rent in your household?

Please select one response only

Yes

No

Don't know

Prefer not to answer

24. Do you own or rent your current place of residence?

Please select one response only

Own

Rent

Don't know

Prefer not to answer

[ASK ALL]

25. How many years have you lived in The City of Calgary? (IF LESS THAN 1 YEAR ENTER 0)

DROP-DOWN BOX [RANGE: 0 to 100]

Prefer not to answer [BELOW DROP-DOWN BOX]

26. What is the highest level of schooling that you have obtained?

Please select one response only

Completed high school or less
Some post secondary or completed a college diploma
Completed university degree or post-grad degree
Don't know
Prefer not to answer

27. Which of the following categories best describes the total annual income, before taxes, of all the members of your household?

Please select one response only

Less than \$30,000
\$30,000 to just under \$45,000
\$45,000 to just under \$60,000
\$60,000 to just under \$75,000
\$75,000 to just under \$90,000
\$90,000 to just under \$105,000
\$105,000 to just under \$120,000
\$120,000 to just under \$135,000
\$135,000 to just under \$150,000
\$150,000 and over
Prefer not to answer

28. Next is a list of different types of residential dwellings. Please tell us which of these best describes the type of dwelling you live in:

Please select one response only

Apartment
Townhouse
Condominium
Single-detached house
Duplex-attached house
Another type of multi-dwelling unit
Don't know
Prefer not to answer

29. Finally, in order to know how to classify your responses, can you please provide us with your postal code? [ACCEPT FIRST THREE DIGITS BUT ALLOW FOR SIX]

RECORD [ENSURE RESPONSE IS IN LETTER-NUMBER-LETTER FORMAT]

This completes the survey. On behalf of The City of Calgary and Ipsos Reid, we thank you very much for taking the time to provide feedback.