

Fall 2020 Research Results Presentation

2020 November 09



Fall 2020 Research

2020 Fall Quality of Life and Citizen Satisfaction Survey

- This survey is an important tool in understanding citizens' overall perceptions of, and satisfaction with, The City of Calgary. Topics include: Quality of life in Calgary, top issues facing the city, City programs and services, value of taxes, City reputation and City performance.

Calgary Attitudes & Outlook Survey

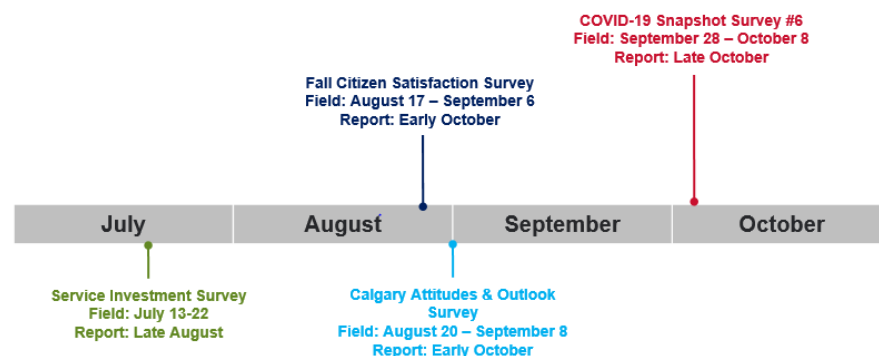
- Given interest expressed by Council regarding the views of young Calgarians, this survey was undertaken with a boosted sample of young adults. Topics include: Attitudes, beliefs and opinions of Calgarians regarding quality of life, the environment, diversity and inclusion, relocation likelihood, vision for Calgary's future, lifestyle and community involvement, communication, technology, and City reputation and performance.

COVID-19 Snapshot #6

- Since the onset of the COVID-19 pandemic, The City has been running recurrent surveys about the impacts of the COVID-19 pandemic on Calgarians to help inform the pandemic response.

Service Investment Survey

- This survey was conducted in order to provide insights on citizens' opinions about service investment through a trade-off analysis.



2020 Research Methodology

2020 Fall Quality of Life and Citizen Satisfaction Survey

- Telephone survey n=2,500
- August 17 – September 6, 2020
- Topics include: Quality of life in Calgary, top issues facing the city, satisfaction levels with a range of city services, value of taxes, City reputation and performance.

Calgary Attitudes & Outlook Survey

- Online survey n=769 (369 aged 18-24, 400 aged 25+)
- August 20 – September 8, 2020
- Topics include: Attitudes, beliefs and opinions of Calgarians regarding quality of life, the environment, diversity and inclusion, relocation likelihood, vision for Calgary's future, lifestyle and community involvement, communication preferences, technology, and City reputation and performance.

COVID-19 Snapshot #6 Survey

- Telephone survey n=500
- September 28 – October 8, 2020
- Topics include: Opinions, beliefs and concerns about the COVID-19 pandemic.

Service Investment Survey

- Telephone survey n=501
- July 13 – 22, 2020
- Topics include: Investment priorities of citizens, quality of life and value for taxes.



Fall 2020 Citizen Satisfaction Survey Highlights

QUALITY OF LIFE



'Good' Quality of Life 79%

85%

I am proud to live in my neighbourhood



79%

I feel safe walking alone in my neighbourhood after dark



77%

Calgary is a great place to make a life

58%

Calgary is a great place to make a living

70%

Calgary is on the **right track** to be a better city 10 years from now

ISSUE AGENDA (TOP 3)



28%

Infrastructure, Traffic & Roads



15%

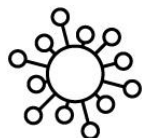
Crime, safety and policing



13%

Taxes

COVID-19



32%

Major threat to personal financial situation

29%

Major threat to physical health

26%

Major threat to mental health

VALUE FOR TAXES & CITIZEN SATISFACTION



53%

'Good' value for tax dollars



67%

'Satisfied' with City programs and services



75%

'Satisfied' with customer service

CITY PERFORMANCE & REPUTATION



69%

'Satisfied' with running of The City by Council and Administration



48%

'Trust' The City of Calgary



73%

'Agree' City practices open & accessible government

2020 Quality of Life Snapshot

79%

‘Good’ overall quality
of life in the city of
Calgary today

87%

Feel that, overall, Calgary is safe

79%↓

Feel safe walking alone in their
neighbourhood after dark

33%

Feel crime in their neighbourhood
has increased in the past three
years

↑Statistically higher than prior wave

↓Statistically lower than prior wave

72%↓

“The City of Calgary municipal
government fosters a city
that is inclusive and accepting of all”

Calgary Attitudes & Outlook Survey

80%

Agree “I feel a sense of belonging in
my own neighbourhood”

73%

Agree “People in Calgary are friendly
and inclusive of all people”







72%

Agree “People in Calgary feel
accepted regardless of their
background, identity or lifestyle”

69%

Agree “Calgary needs to address
racism and discrimination”

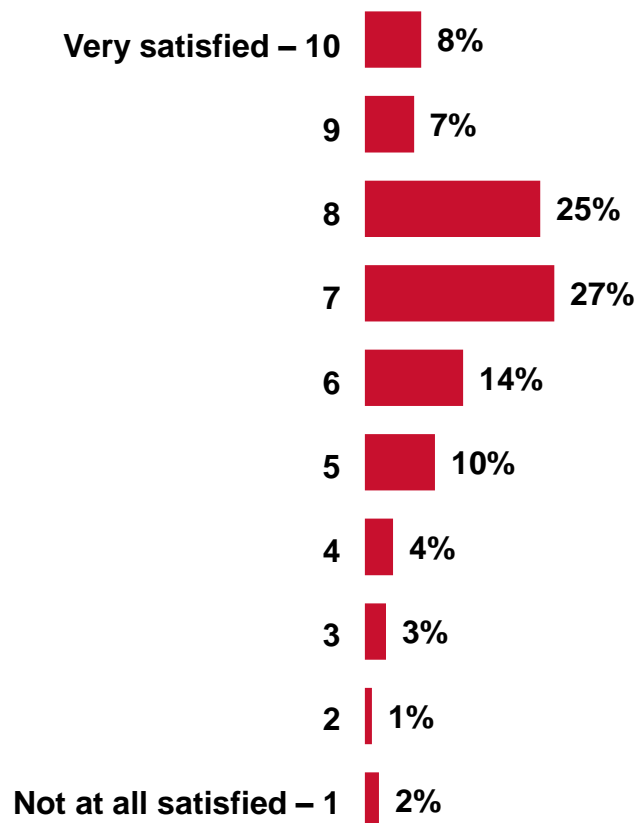
Attitudes & Outlook Survey – Notable Findings

			Aged 18-24	Aged 25+
	Quality of Life	Rate the overall quality of life in Calgary as 'good'	93%↑	84%
		Agree that "Calgary is a great place to make a living"	75%↑	63%
		Agree that "Calgary is moving in the right direction to ensure a high quality of life for future generations"	70%↑	57%
	Quality of Life Performance Measures	Calgary's Performance: <i>Environmental friendliness</i>	65%↓	81%
		Calgary's Performance: <i>Transit</i>	61%↓	70%
		Calgary's Performance: <i>Employment opportunities</i>	54%↑	43%
	Environmental Perceptions	Agree with the statement "I think we need to act now to address climate change"	89%↑	73%
		Feel concerned about climate change	86%↑	69%
	Diversity & Inclusion	Say that "Calgary needs to address racism and discrimination"	82%↑	68%
	Vision for the Future	Agree that "Calgary is on the right track to be a better city 10 years from now"	80%↑	63%
	Making Calgary a Vibrant Place to <u>Live</u> or <u>Work</u>	Initiative to Make Calgary a Vibrant Place <u>to Live</u> : <i>Economy</i>	12%↓	19%
		Initiative to Make Calgary a Vibrant Place <u>to Live</u> : <i>Transit</i>	16%↑	11%
		Initiative to Make Calgary a Vibrant Place <u>to Live</u> : <i>Arts & Culture</i>	17%↑	5%
		Initiative to Make Calgary a Vibrant Place <u>to Work</u> : <i>Employment/ Career opportunities</i>	33%↑	26%
	Attitudes Towards and Perceptions about the Government	Agree that "It should be primarily government, not the private sector, that is concerned with solving society's social problems"	52%↑	35%
		Trust The City of Calgary	60%↑	49%
		Satisfied with The City of Calgary (including Council and Administration) performance	72%↑	56%

↑Statistically higher than adults aged 25 or older
↓Statistically lower than adults aged 25 or older

Satisfaction with The City

Overall Satisfaction with City Programs & Services

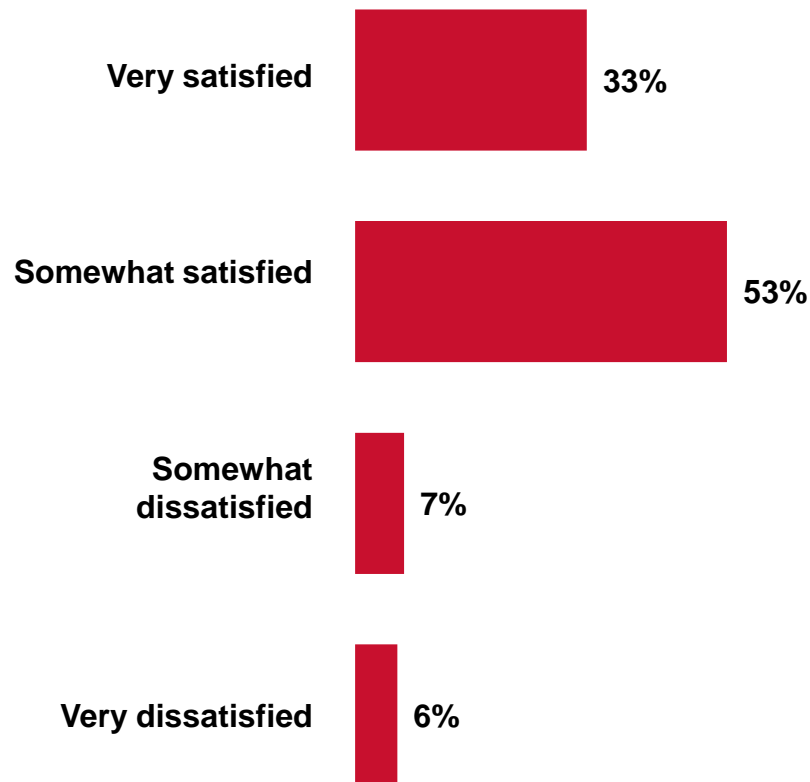


On a scale from “1” to “10” where “1” represents “not at all satisfied” and “10” represents “very satisfied,” how satisfied are you with the overall level and quality of services and programs provided by The City of Calgary?

Base: Valid respondents (n=2,487)

Source: Fall 2020 Citizen Satisfaction Survey

Satisfaction with the City's COVID-19 Response



Overall, how satisfied are you with The City's COVID-19 response?

Base: All respondents

Source: COVID-19 Snapshot #6 Survey

Notable Service Perception Changes

Emergency Services

89%↓

Satisfied with the
Calgary Police Service

<u>Change in Satisfaction</u>	<u>Service</u>	<u>Change in 'Invest More'</u>
+1%	Calgary Fire Department	-11%
-2%	9-1-1	-1%
-2%	Disaster planning and response	+9%
-3%	Calgary Police Service	-13%

Transportation Services

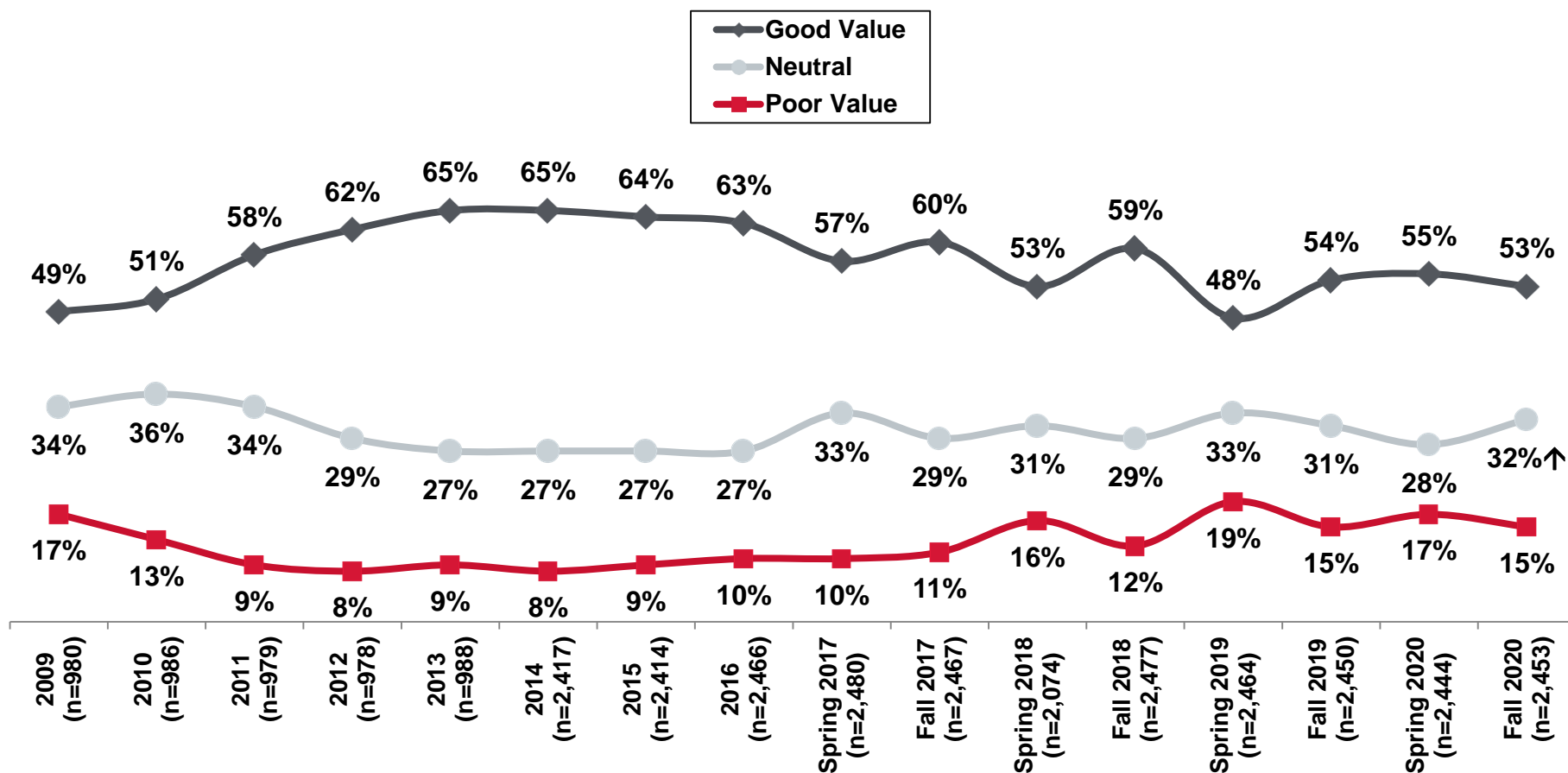
81%↑

Satisfied with traffic
flow management

<u>Change in Satisfaction</u>	<u>Service</u>	<u>Change in 'Invest More'</u>
+12%	Traffic flow management	-11%
+6%	Transportation planning	-10%
+5%	Calgary Transit	-7%
-6%	Road maintenance including pothole repairs	+4%

Source: Fall 2020 Citizen Satisfaction Survey

Tracking Perceived Value of Taxes



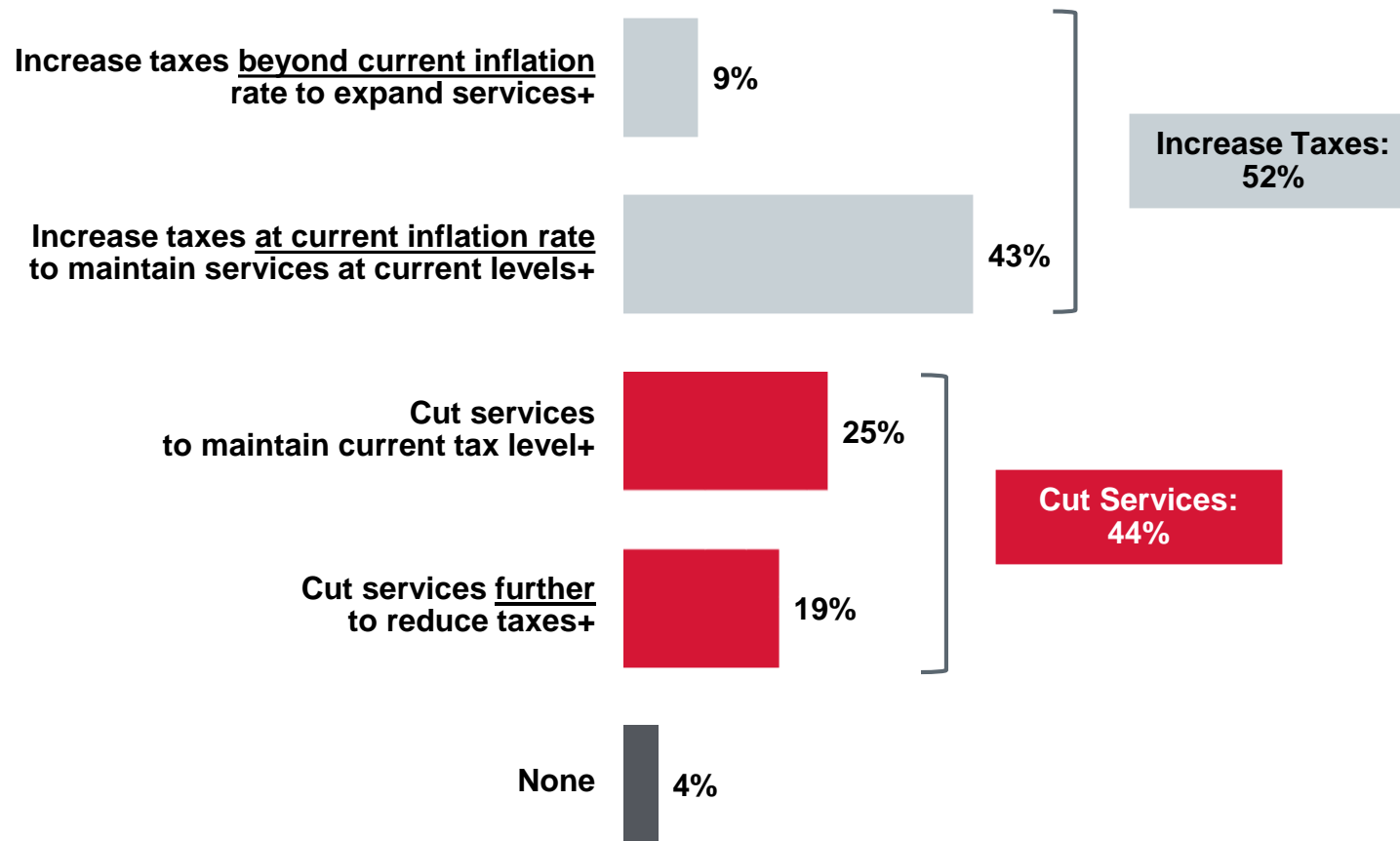
Your property tax dollars are divided between The City and the Province. In Calgary, approximately two-thirds of your residential property tax payment goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal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

Base: Valid respondents

Source: Fall 2020 Citizen Satisfaction Survey

↑ Statistically higher than Spring 2020
↓ Statistically lower than Spring 2020

Balancing Taxation and Service Delivery Levels



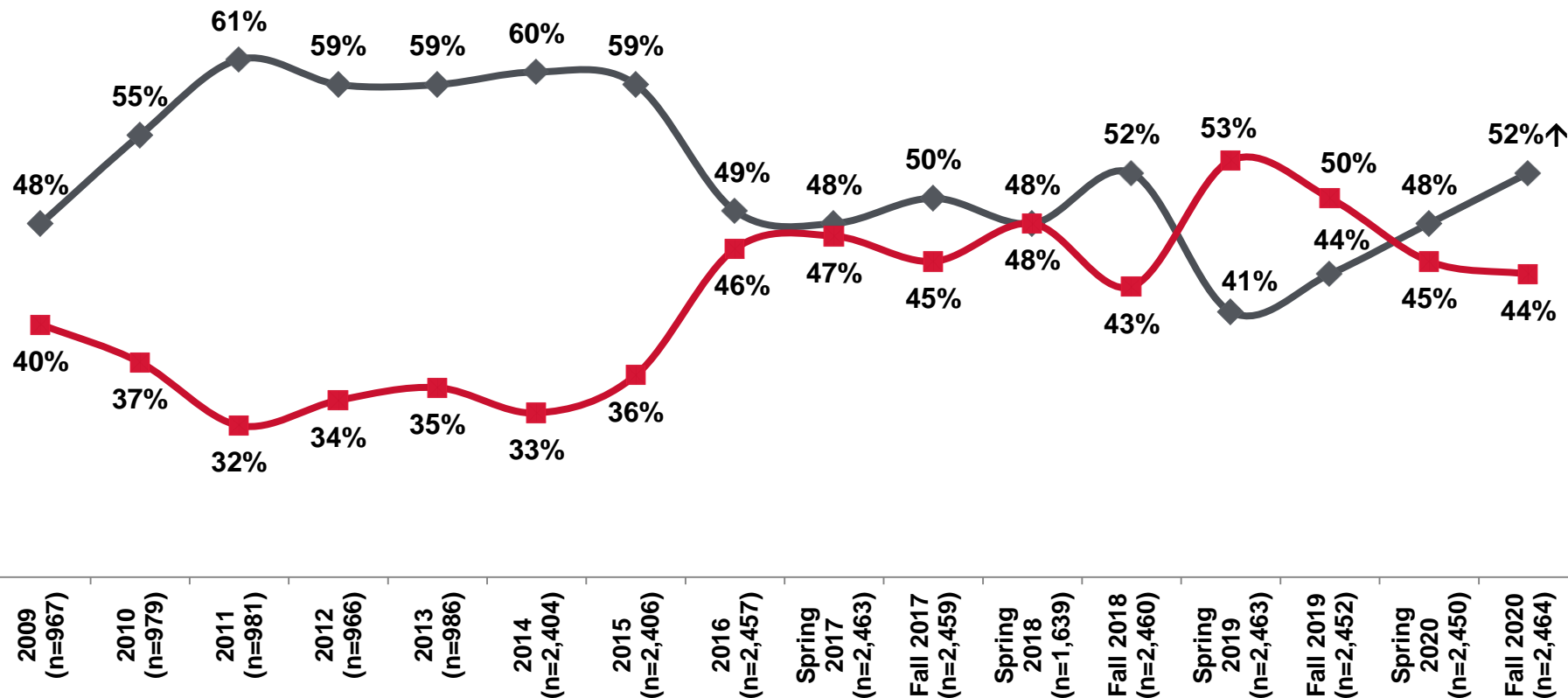
Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following four options would you most like The City to pursue?

Base: Valid respondents (n=2,464) | +Slight wording changes in Fall 2020

Source: Fall 2020 Citizen Satisfaction Survey

Balancing Taxation and Service Delivery Levels

◆ Increase taxes at/beyond current inflation rate to maintain or expand services+
 ■ Cut services to maintain/further reduce current tax levels+



Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following four options would you most like The City to pursue?

Base: Valid respondents | +Slight wording changes in Fall 2020

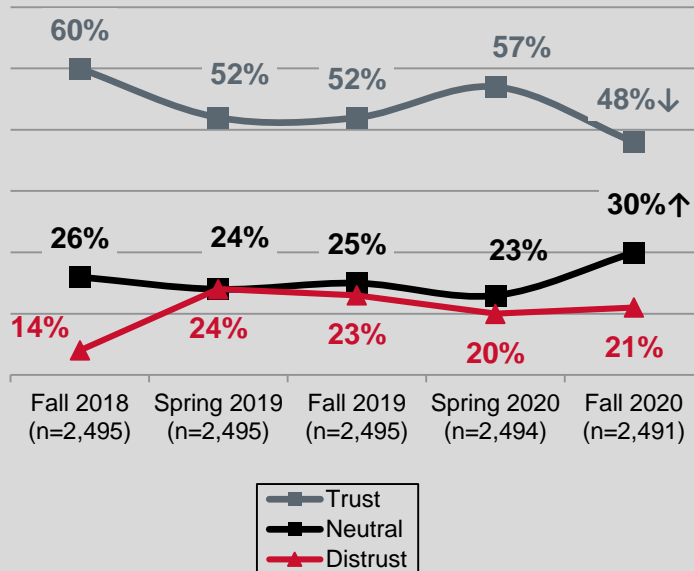
Source: Fall 2020 Citizen Satisfaction Survey

↑ Statistically higher than Spring 2020
 ↓ Statistically lower than Spring 2020

2020 Trust & Reputation Snapshot

48%↓

**'Trust' The City
of Calgary**



↑Statistically higher than prior wave
 ↓Statistically lower than prior wave

69%

**'Satisfied' with the way The City
of Calgary is going about
running our City**

