

Calgary



# 2017 Quality of Life and Citizen Satisfaction Survey

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Prepared for The City of Calgary by:

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## Methodology

- ❖ Telephone survey conducted with a randomly selected sample of 2,500 Calgarians aged 18 years and older between August 16<sup>th</sup> and September 10<sup>th</sup>, 2017.
  - Both landline (70%) and cell phone (30%) sample were used.
  - The average interview length was 31 minutes.
- ❖ Final data were weighted to ensure the overall sample's quadrant, ward, and age/gender composition reflects that of the actual Calgary population aged 18 or older according to 2016 Municipal and Federal Census data.
- ❖ The margin of error (MOE) for the total sample of 2,500 is  $\pm 2.0$  percentage points, 19 times out of 20.
  - The margin of error by quadrant is as follows:
    - Northeast: n=465 (MOE  $\pm 4.6$ )
    - Northwest: n=745 (MOE  $\pm 3.6$ )
    - Southeast: n=583 (MOE  $\pm 4.1$ )
    - Southwest: n=707 (MOE  $\pm 3.7$ )
  - The sample size per ward ranged from n=156 (MOE  $\pm 7.9$ ) to n=210 (MOE  $\pm 6.8$ ).
- ❖ Where possible, results are compared to previous iterations of the Citizen Satisfaction survey.
  - $\uparrow$  indicates number is significantly higher than 2016
  - $\downarrow$  indicates number is significantly lower than 2016
- ❖ Note on the Late Fall 2017 survey:
  - A separate telephone survey was conducted with a randomly selected sample of 1,500 Calgarians aged 18 years and older between November 2<sup>nd</sup> and 23<sup>rd</sup>, 2017.
  - Where applicable, results from the Late Fall 2017 survey are also provided.



## 2017 Highlights





- 1** Perceptions about the quality of life in Calgary remain strong, and declining quality of life metrics have now stabilized.
- 2** “*Infrastructure, traffic and roads*” remains in the top position on the 2017 issue agenda, while “*transit*” continues to hold second place, and “*crime, safety and policing*” remains third.
- 3** Overall satisfaction with the level and quality of City services and programs is strong, although statistically significant decreases are observed for a number of specific services.
- 4** Affordable housing, transportation related services, social services, and the Calgary Police Service surface as the top areas where the public would like to see increased investment.
- 5** The perceived value of property tax dollars continues a downward trend this year, and Calgarians remain split in their preference for tax increases versus service cuts.
- 6** The City of Calgary continues to perform well on the environmental front and sees a gain with regard to environmental programs and services.
- 7** Overall perceptions about The City’s customer service delivery holds strong, although perceptions of specific aspects of service delivery, transparency, and citizen input, are less positive than in 2016.
- 8** Overall satisfaction with City communications remains strong, although more Calgarians – close to one-half – say they receive “too little” information from The City.



# Key Findings: Quality of Life

## Perceptions about the quality of life in Calgary remain strong, and declining metrics have for the most part stabilized.

- ❖ In 2017, more than eight-in-ten (85%) Calgarians say the quality of life in Calgary today is ‘good’ (statistically consistent with 83% in 2016.)
- ❖ Further, the plurality (45%) say the quality of life in Calgary has ‘stayed the same’ in the past three years, while 20% (up 2 percentage points from 2016) say it has ‘improved.’ Although more than one-third (35%) of residents say the quality of life has ‘worsened,’ this metric has stabilized following a 17 percentage point increase from 2014 (20%) to 2016 (37%).
- ❖ Agreement that ‘Calgary is a great place to make a living’ remains moderate but stable.
  - In 2017, 68% of Calgarians agree with the statement – consistent with 65% in 2016, following a 15 percentage point drop from 2015 (80%) to 2016.
- ❖ Statistically significant decreases are seen with regard to Calgary’s direction for the future.
  - Just over six-in-ten (62%) citizens agree ‘Calgary is moving in the right direction to ensure a high quality of life for future generations,’ down 4 percentage points from 66% in 2016 (and down 16 percentage points from 78% in 2013).
  - While still very strong, fewer Calgarians (84% vs. 86% in 2016) agree that ‘Calgary is on the right track to being a better city 10 years from now.’
    - It is notable that ‘*strongly agree*’ ratings have decreased 13 percentage points over the past five years (from 41% in 2013 to 28% in 2017).
- ❖ While eight-in-ten (81%) Calgarians continue to say they do or would feel safe walking alone in their neighborhood after dark, this is statistically lower than 2016 (84%).



## Key Findings: Issue Agenda

***“Infrastructure, traffic and roads”* remains in the top position on the 2017 issue agenda, while *“transit”* continues to hold second place, and *“crime, safety and policing”* remains third.**

- ❖ In 2017, 35% of Calgarians cite *“infrastructure, traffic and roads”* as an important issue (identical to 2016), while one-quarter (26%) say it is the most important issue.
- ❖ One-in-five (19%) Calgarians cite *“transit”* as an important issue, consistent with 2016 (21%), while 13% say it is the most important issue.
- ❖ *“Crime, safety and policing”* follows in third place with 13% of Calgarians citing it as an important issue (consistent with 15% in 2016). Fewer than one-in-ten (9%) say it is the most important issue.
- ❖ In 2017, just 6% of Calgarians cite the *“economy”* as an important issue – down 3 percentage points from 2016 (9%), and 4% say it is the most important issue (a 3 point decline from 7% in 2016).



# Key Findings: Satisfaction with City Services and Programs

**Overall satisfaction with the level and quality of City services and programs is solid and unchanged from one year ago.**

- ❖ Eight-in-ten (79%) Calgarians say they are satisfied with the overall level and quality of services and programs provided by The City, identical to 2016 findings.
- ❖ More than six-in-ten Calgarians are satisfied with each of the 34 services and programs assessed, with satisfaction 90% or higher for 16 services and programs, and 80% or higher for another 12.
  - The lowest satisfaction ratings are for on-street bikeways (64%) and traffic flow management (68%).
- ❖ Statistically significant decreases from 2016 are seen for satisfaction with a number of services and programs, most notably:
  - Residential garbage collection service – overall satisfaction is down 5 percentage points (91% vs. 96%), while ‘very satisfied’ ratings have dropped 9 percentage points (63% vs. 72%).
  - Calgary Police Service – overall satisfaction is down 3 percentage points (91% vs. 94%), while ‘very satisfied’ ratings have dropped 7 percentage points (55% vs. 62%).
  - Support for arts and culture – overall satisfaction is down 6 percentage points (83% vs. 89%), and ‘very satisfied’ ratings have dropped 4 percentage points (32% vs. 36%).
  - Two services related to Roads – snow removal (overall satisfaction is down 4 percentage points to 75%) and road maintenance including pothole repairs (overall satisfaction is down 5 percentage points to 73%).
- ❖ Conversely, a 6 percentage point gain is seen for satisfaction with property tax assessment (79% in 2017 vs. 73% in 2016); rebounding following a 10 point drop between 2015 (83%) and 2016.



# Key Findings: Desired Investment and Taxation

## Transportation related services, affordable housing, social services and the Calgary Police Service emerge as the most desired areas for increased investment.

- ❖ When asked if The City should invest more, less or the same amount in specific services and programs, one-half or more Calgarians say The City should invest more in:
  - Affordable housing (64%);
  - Social services for individuals (60%);
  - Calgary Police Service (55%); and,
  - Six Transportation services: Calgary Transit (61%), traffic flow management (59%), road maintenance (55%), transportation planning (54%), snow removal (52%), and City operated roads and infrastructure (50%).

## The perceived value of property tax dollars continues a downward trend, and Calgarians remain split in their preference for tax increases versus service cuts.

- ❖ Six-in-ten (60%) Calgarians give The City a 'good value' rating for the value of their property tax dollars – statistically unchanged from 2016 (63%) but down 5 percentage points from 2014 (65%).
- ❖ One-half (50%) support tax increases to maintain or expand services (consistent with 49% in 2016, but remaining significantly lower than 59% in 2015), while 45% support cutting services to maintain or reduce taxes (also consistent with 46% in 2016 but remaining higher than 2015 – 36%).
  - It is notable that the preference for The City to 'cut services to maintain the current tax level' is down 3 percentage points from 2016, while the preference to 'cut services to reduce taxes' is up 3 points.
- ❖ Agreement that 'The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services' has been declining.
  - In 2017, 60% agree – a statistical 3 percentage point decrease from 2016 (63%) and down 7 points from 2014 (67%).

# Key Findings: The Environment

**The City of Calgary continues to perform well on the environmental front and sees a gain with regard to environmental programs and services.**

- ❖ Perceptions about the overall state of the environment in Calgary today are extremely positive with 94% saying it is 'good' and 43% offering a 'very good' rating.
  - Though remaining very high, 'good' ratings are down 3 percentage points from 2016 (97%).
- ❖ Satisfaction with The City's environmental performance remains high at 91% (identical to the last four years), with 'very satisfied' ratings (38%) continuing an upwards trend (statistically consistent with 36% in 2016 but up 6 percentage points from 32% in 2015).
- ❖ Satisfaction with The City's environmental programs and services aimed at helping Calgarians reduce their environmental impact has increased.
  - In 2017, 35% of Calgarians are 'very satisfied' – up a statistically significant 7 percentage points from 2016 (28%), and 10 points from 2015 (25%).
  - Overall satisfaction also sees a 3 percentage point gain from 86% in 2016 to 89% in 2017.



# Key Findings: Customer Service

**Overall perceptions about The City's customer service delivery holds strong, although perceptions of specific aspects of service delivery, transparency and citizen input are less positive than in 2016.**

- ❖ Among those who contacted or dealt with The City in the past 12 months, 78% are satisfied with the overall level and quality of customer service received, and 84% are satisfied with their most recent contact (both measures on par with the past three years).
- ❖ That said, agreement with seven of eight statements regarding City service delivery, transparency, and citizen input into decision-making see statistically significant decreases from 2016.
  - Service delivery:
    - City staff are courteous, helpful and knowledgeable – down 2 percentage points (92% vs. 94%).
    - The quality of customer service from The City is consistently high – down 3 percentage points (84% vs. 87%).
    - The City of Calgary makes customer service a priority – down 3 percentage points (82% vs. 85%).
    - City staff are easy to get a hold of when I need them – down 4 percentage points (77% vs. 81%).
  - Transparency:
    - The City of Calgary practices open and accessible government – down 4 percentage points (79% vs. 83%).
  - Citizen input into decision making:
    - The City uses input from Calgarians in decision-making about City projects and services – down 6 percentage points (68% vs. 74%).
    - The City allows citizens to have meaningful impact into decision-making – down 4 percentage points (65% vs. 69%).

# Key Findings: Communications

**Overall satisfaction with the quality of City information and communications remains strong, while perceptions of the amount of information received from The City has declined.**

- ❖ In 2017, 84% of Calgarians are satisfied with the overall quality of City information and communications (on par with 85% in 2016).
  - It is notable, however, that ‘very satisfied’ ratings have been decreasing steadily over the past few years with a 12 percentage point drop since 2013 (30% in 2013 vs. 18% in 2017).
- ❖ Currently, 51% of Calgarians say they receive ‘just the right amount’ of information from The City (down a statistically significant 3 percentage points from 54% in 2016), while 47% say they receive ‘too little’ information (up a statistically significant 3 points from 44% in 2016).
  - Moreover, the percentage of Calgarians who say they receive ‘too little’ information has climbed a marked 17 percentage points since 2013 (30%).
- ❖ When asked to cite the top areas they would like The City to provide more information, “*budget and spending*” (36%) tops the list (46% among those who say ‘too little’ and 27% among those who say ‘just the right amount’ of information), followed by “*infrastructure, traffic and roads*” (32% overall, 29% among those who say ‘too little’ and 34% among those who say ‘just the right amount’ of information).

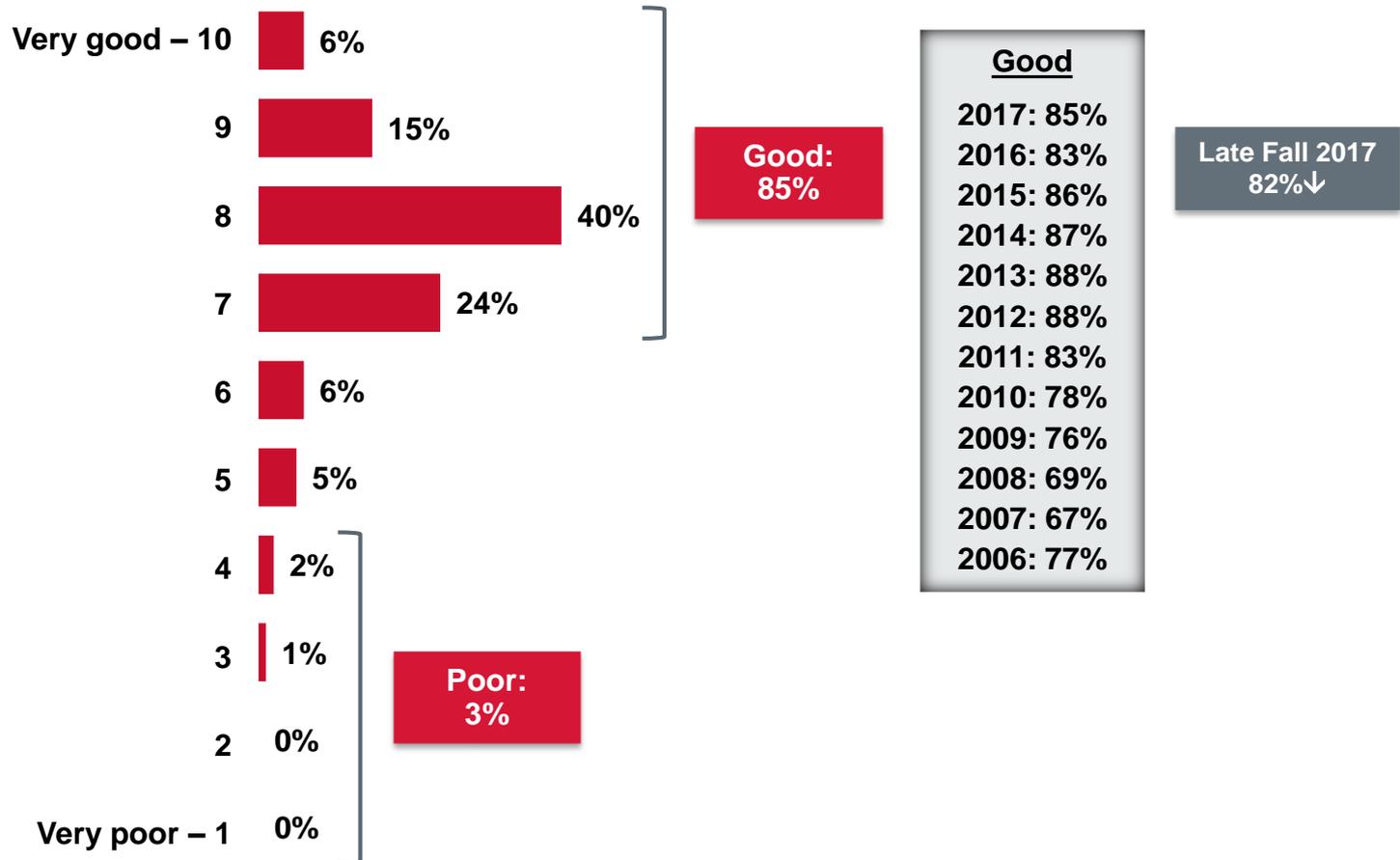


## Quality of Life





# Overall Quality of Life in Calgary

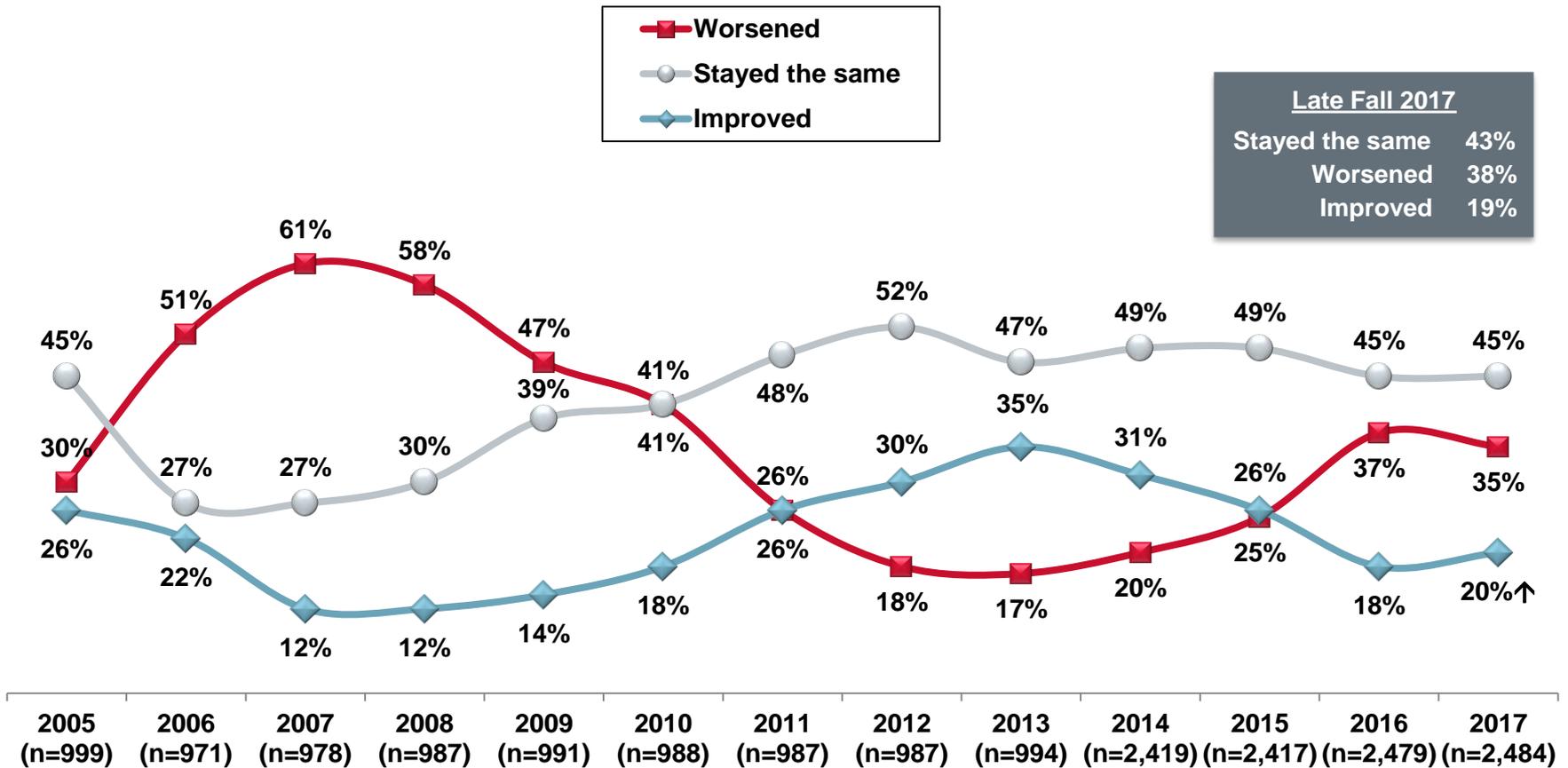


On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in the city of Calgary today?

Base: Valid respondents (n=2,499)



# Perceived Change in the Quality of Life



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

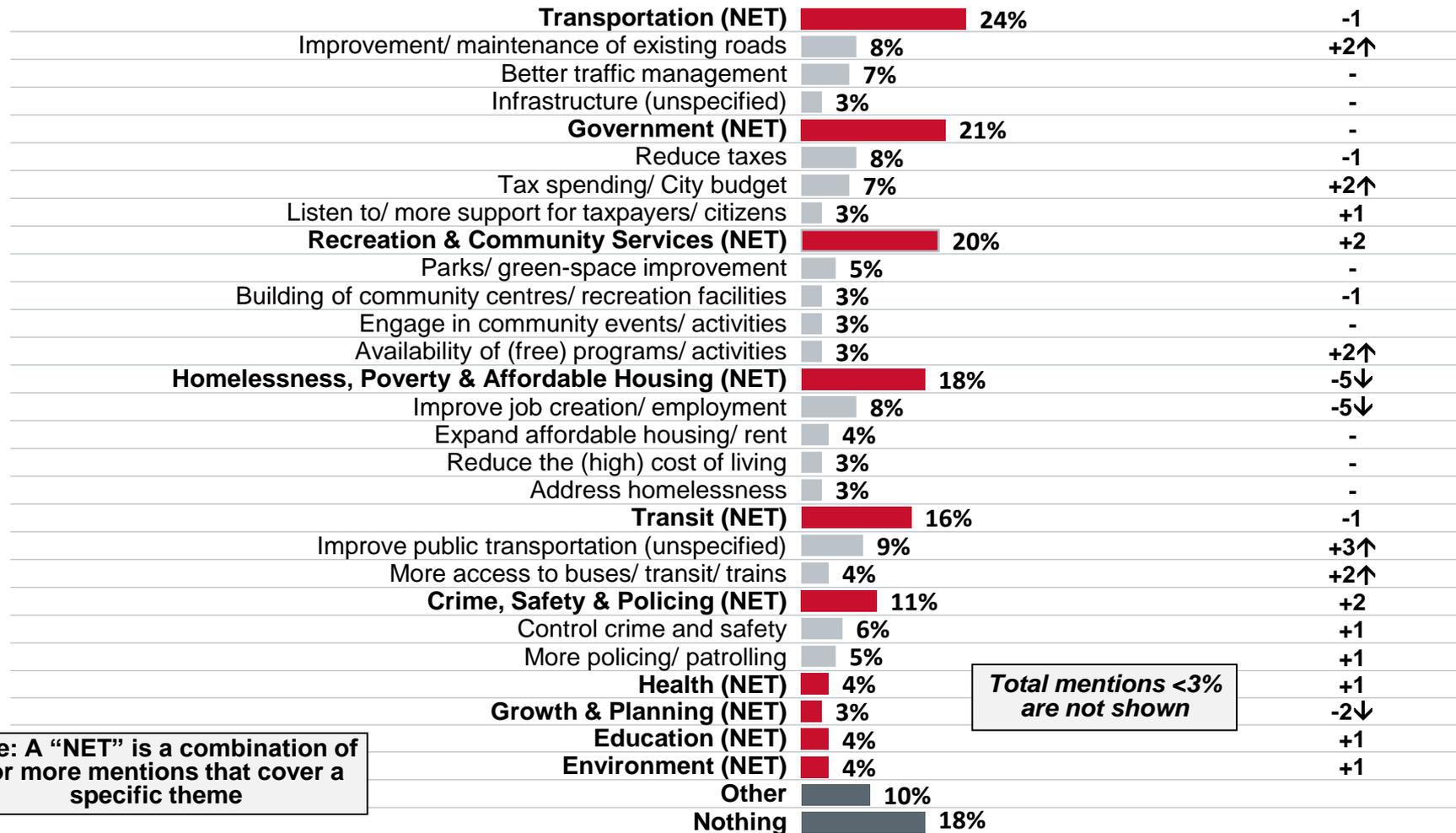
Base: Valid respondents



# Actions to Improve the Quality of Life

Multiple Responses

Change  
2016 – 2017



Total mentions <3% are not shown

Note: A "NET" is a combination of 2 or more mentions that cover a specific theme

Thinking about all of the different things that contribute to the quality of life in Calgary, what specific actions do you think The City of Calgary could take to improve the quality of life?

Base: Valid respondents (n=2,359)



# Sustainability: Connectedness

■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

**% Agree**

**Late Fall 2017**

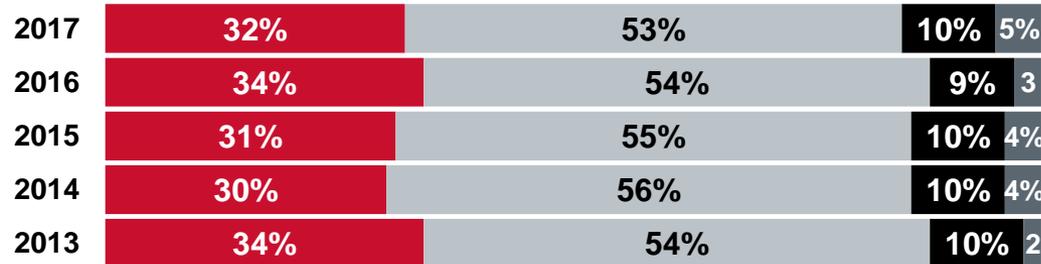
I am proud to be a Calgarian



89%  
90%  
90%  
91%  
92%

89%

I am proud to live in my neighbourhood



85%↓  
88%  
86%  
86%  
88%

84%

I am regularly involved in neighbourhood and local community events



30%  
30%  
30%  
30%  
32%

28%

Next, I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree."

Base: Valid respondents (Bases vary)



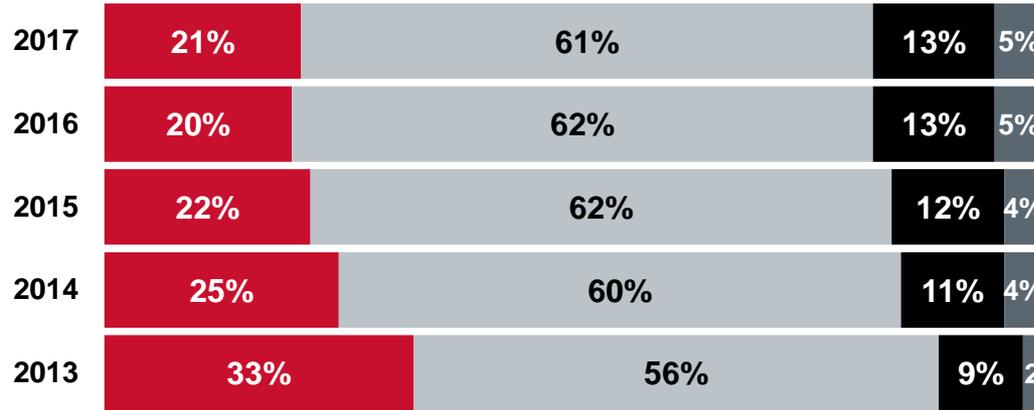
# Sustainability: Making a Life and Making a Living

■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

**% Agree**

Late Fall 2017

Calgary is a great place to make a life



82%

81%

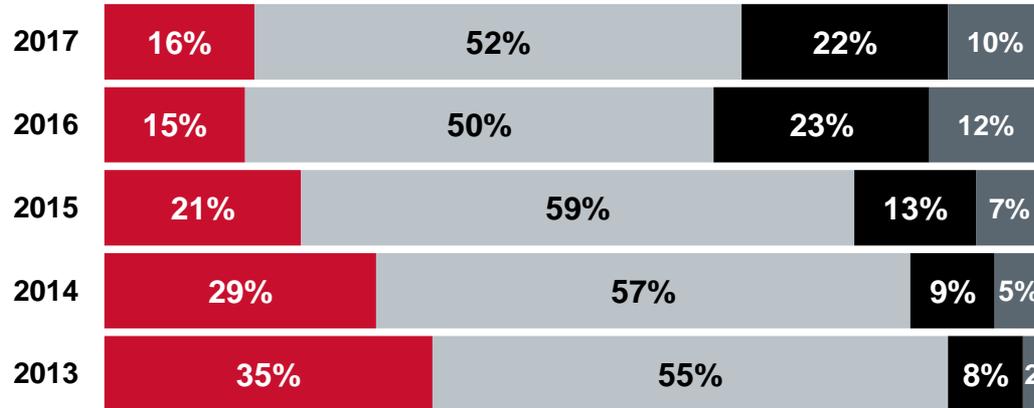
82%

84%

85%

89%

Calgary is a great place to make a living



68%

68%

65%

80%

86%

90%

Next, I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree."

Base: Valid respondents (Bases vary)



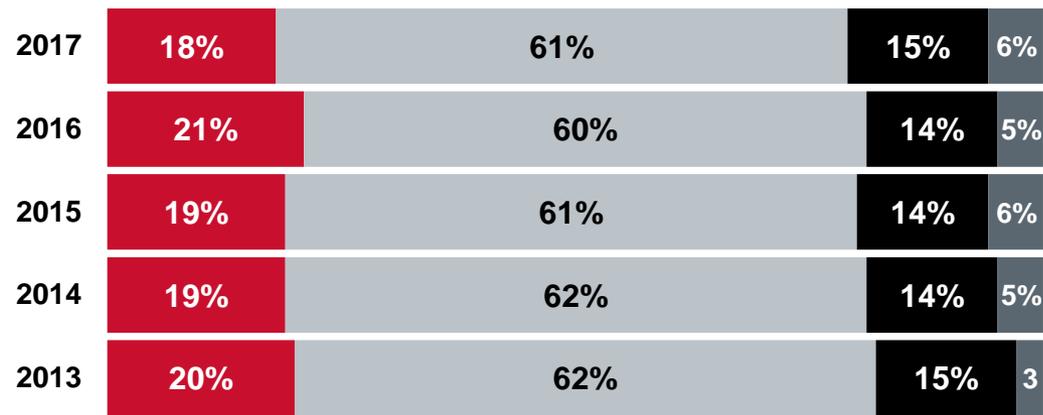
# Sustainability: Inclusivity and Direction for the Future

■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

**% Agree**

Late Fall 2017

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



79%↓  
81%  
80%  
81%  
82%

Calgary is moving in the right direction to ensure a high quality of life for future generations



62%↓  
66%  
66%  
71%  
78%

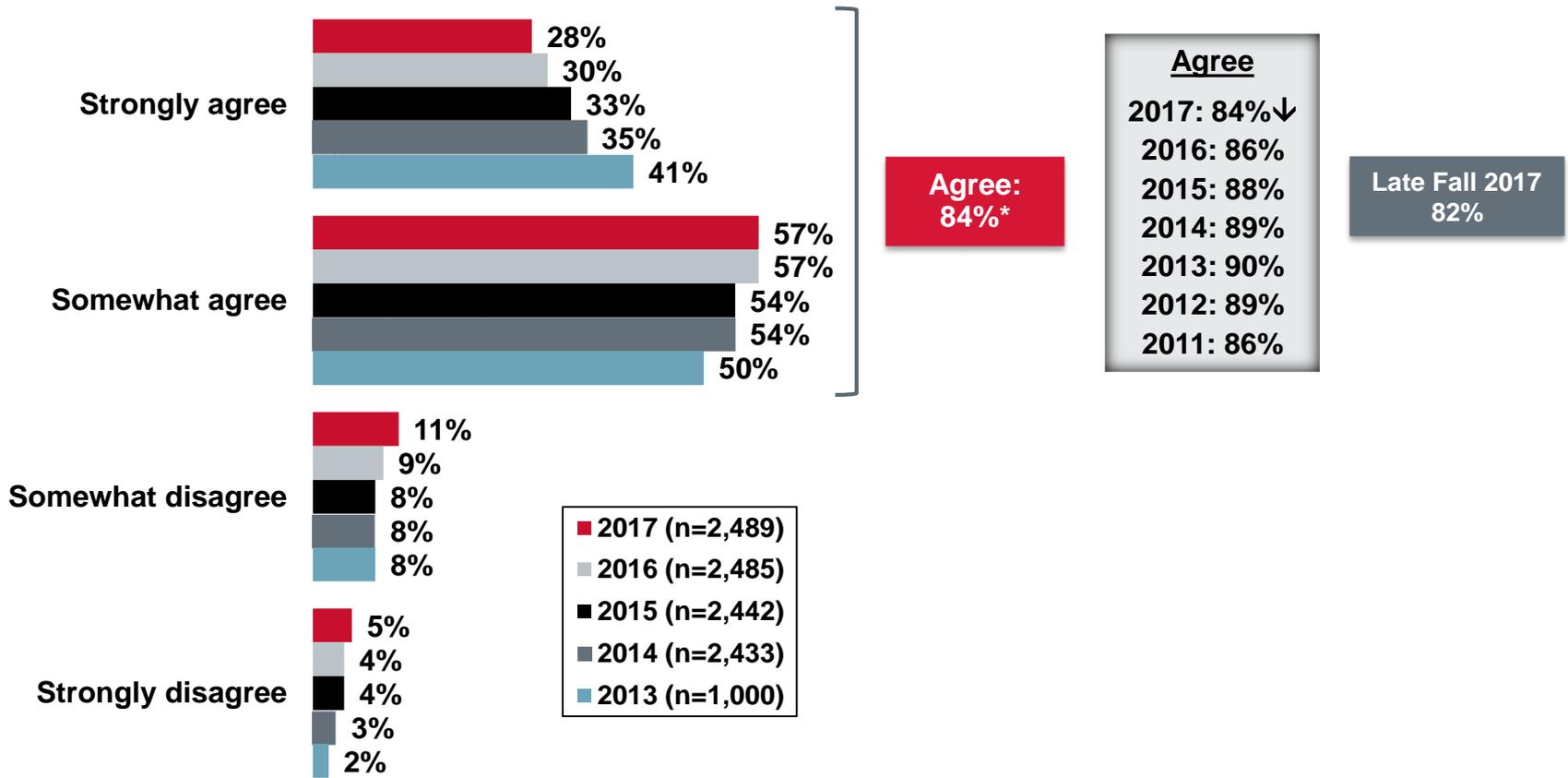
58%↓

Next, I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree."

Base: Valid respondents (Bases vary)



# Calgary: On the Right Track to Being a Better City?



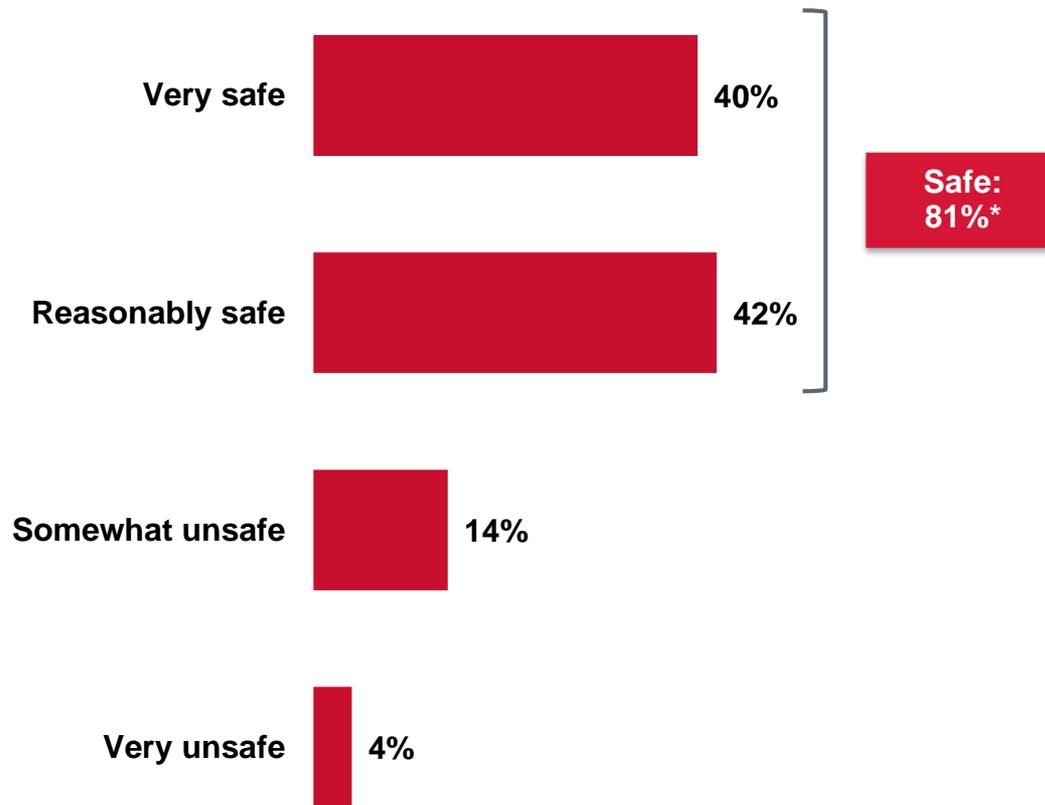
\*Rounding

There are a wide array of challenges facing The City of Calgary today, but also many success stories. Please indicate whether you agree or disagree with the following statement about Calgary's future: Calgary is on the right track to be a better city 10 years from now.

Base: Valid respondents



# Perceived Safety in Own Neighbourhood



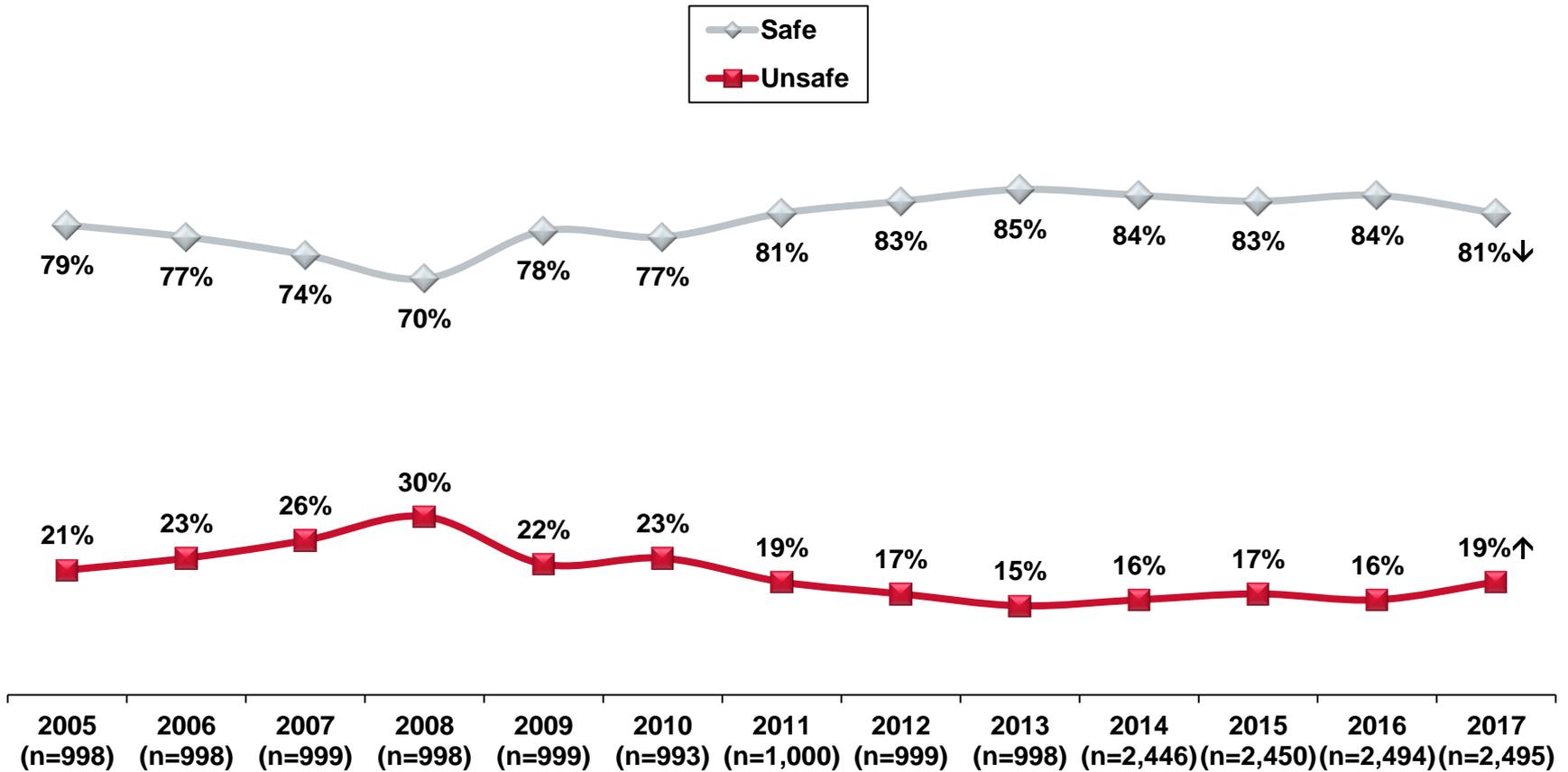
\*Rounding

*How safe do you feel or would you feel walking alone in your neighbourhood after dark?*

Base: Valid respondents (n=2,495)



# Tracking Perceived Safety in Own Neighbourhood



*How safe do you feel or would you feel walking alone in your neighbourhood after dark?*

Base: Valid respondents



## Issue Agenda





# Issue Agenda

Multiple Responses

■ First Mention ■ Other Mentions

Change  
2016 – 2017

| Issue  | First Mention | Other Mentions | NET | Change 2016 – 2017 |
|--|---------------|----------------|-----|--------------------|
| <b>Infrastructure, Traffic &amp; Roads (NET)</b>               | 26%           | 9%             | 35% | -                  |
| Traffic congestion   | 7%            | 3              | 10% | -1                 |
| Infrastructure maintenance/ improvement/ development           | 4%            | 5%             |     | -1                 |
| Road conditions  | 4%            | 3              | 7%  | -2↓                |
| (Lack of) snow removal   | 3             | 4%             |     | +1                 |
| <b>Transit (NET)</b>   | 13%           | 6%             | 19% | -2                 |
| Public Transportation [incl. buses/ C-train/ poor service]     | 8%            | 3              | 11% | -                  |
| Transportation (unspecified)                                   | 4%            | 3              | 7%  | -1                 |
| <b>Crime, Safety &amp; Policing (NET)</b>                      | 9%            | 4%             | 13% | -2                 |
| Crime [incl. breaking and entering/ gangs/ drug dealers, etc.] | 5%            | 7%             |     | -1                 |
| Public safety  | 4%            | 6%             |     | -                  |
| <b>Taxes (NET)</b>   | 6%            | 8%             |     | -                  |
| <b>Recreation (NET)</b>  | 4%            | 3              | 7%  | -2↓                |
| <b>Environment &amp; Waste Management (NET)</b>                | 4%            | 3              | 7%  | +1                 |
| <b>Economy (NET)</b>   | 4%            | 6%             |     | -3↓                |
| <b>Budget &amp; Spending (NET)</b>                             | 4%            | 6%             |     | +2↑                |
| <b>Education (NET)</b>   | 4%            | 6%             |     | -1                 |
| <b>Homelessness, Poverty &amp; Affordable Housing (NET)</b>    | 3             | 5%             |     | +1                 |
| <b>Growth &amp; Planning (NET)</b>                             | 3             | 4%             |     | -                  |
| Other  | 25%           |                |     |                    |
| None   | 15%           |                |     |                    |

Total mentions <4% are not shown

Note: A “NET” is a combination of 2 or more mentions that cover a specific theme

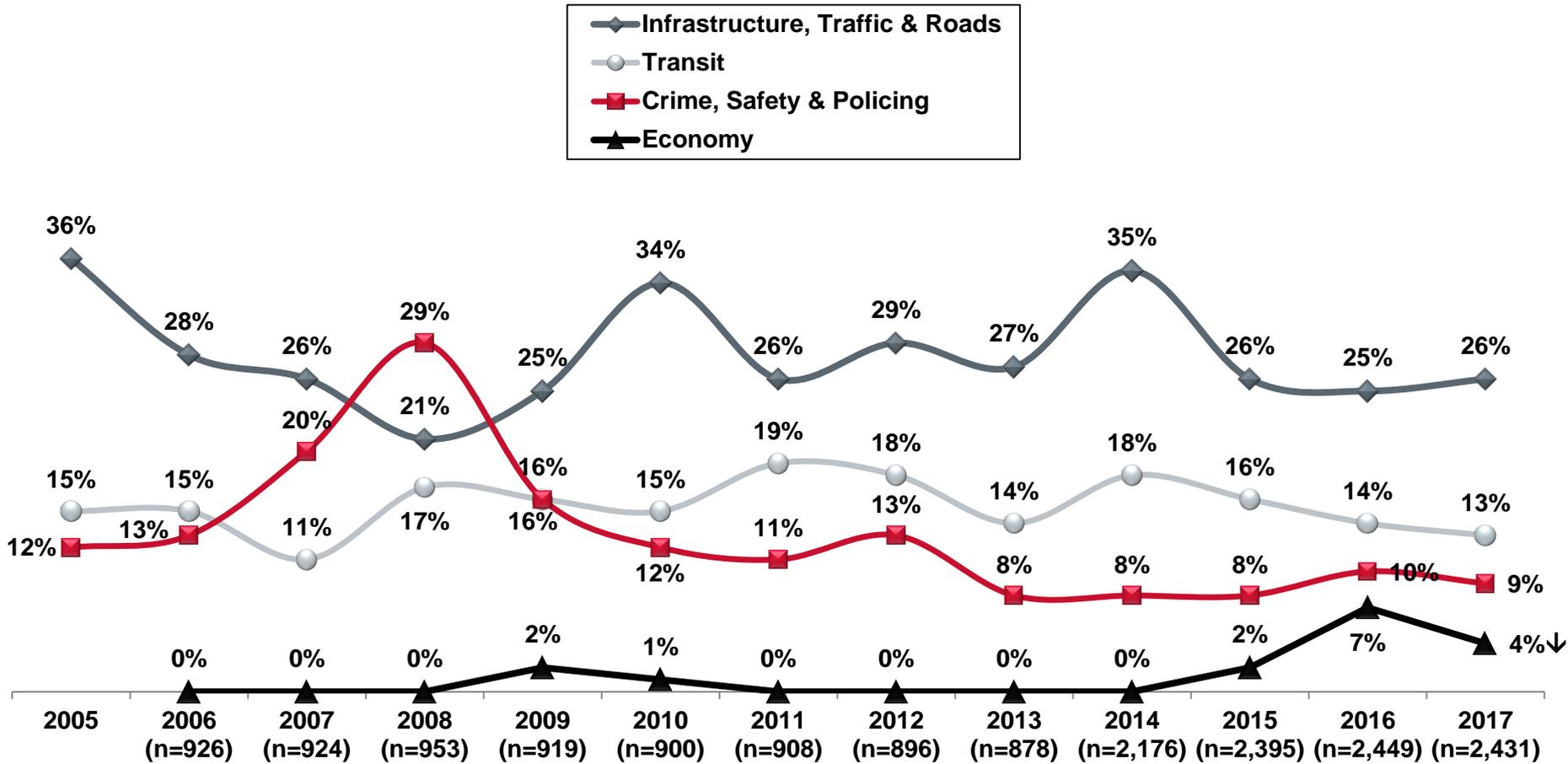
*In your view, as a resident of the city of Calgary, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders? Are there any other important local issues?*

Base: Valid respondents (n=2,441)



# Tracking Most Important Issue Facing Calgary

First Mention Only



*In your view, as a resident of the city of Calgary, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders?*

Base: Valid respondents



## City Programs and Services





# Top-of-Mind Programs and Services

Change  
2016 – 2017

Multiple  
Responses

|   |            |            |
|---|------------|------------|
| <b>Recreation (NET)</b>                             | <b>41%</b> | <b>-3↓</b> |
| Recreation/ leisure centres/ programs               | 29%        | -4↓        |
| Swimming pools/ facilities/ lessons                 | 6%         | -          |
| Cultural/ art events/ festivals/ museums/ theatres  | 5%         | -          |
| Community centres                                   | 4%         | -          |
| Sports facilities or programs/ sports (unspecified) | 3%         | -1         |
| <b>Transit</b>                                      | <b>33%</b> | <b>-3↓</b> |
| <b>Waste &amp; Recycling (NET)</b>                  | <b>28%</b> | <b>+7↑</b> |
| Waste management/ garbage/ dump/ landfills          | 21%        | +5↑        |
| Recycling/ blue box                                 | 10%        | +2↑        |
| Composting  | 6%         | +5↑        |
| Sanitation/ cleaning services                       | 4%         | -          |
| <b>Parks (playgrounds, green spaces, pathways)</b>  | <b>24%</b> | <b>-2</b>  |
| <b>Police/ safety/ law enforcement</b>              | <b>20%</b> | <b>+3</b>  |
| <b>Roads</b>  | <b>15%</b> | <b>-</b>   |
| <b>Fire Department</b>                              | <b>11%</b> | <b>-</b>   |
| <b>Libraries</b>                                    | <b>11%</b> | <b>-1</b>  |
| <b>Community &amp; Neighbourhood Services</b>       | <b>10%</b> | <b>-1</b>  |
| <b>Water</b>  | <b>8%</b>  | <b>+1</b>  |
| <b>Health/ health services/ healthcare</b>          | <b>7%</b>  | <b>+1</b>  |
| <b>Education/ schools</b>                           | <b>6%</b>  | <b>-</b>   |
| <b>Ambulance/ paramedics/ EMS</b>                   | <b>4%</b>  | <b>+1</b>  |
| <b>Animal &amp; Bylaw Services</b>                  | <b>3%</b>  | <b>-</b>   |
| <b>Utility Services</b>                             | <b>3%</b>  | <b>+1</b>  |
| <b>Other</b>  | <b>26%</b> |            |
| <b>None/ Nothing</b>                                | <b>11%</b> |            |

Note: A "NET" is a combination of 2 or more mentions that cover a specific theme

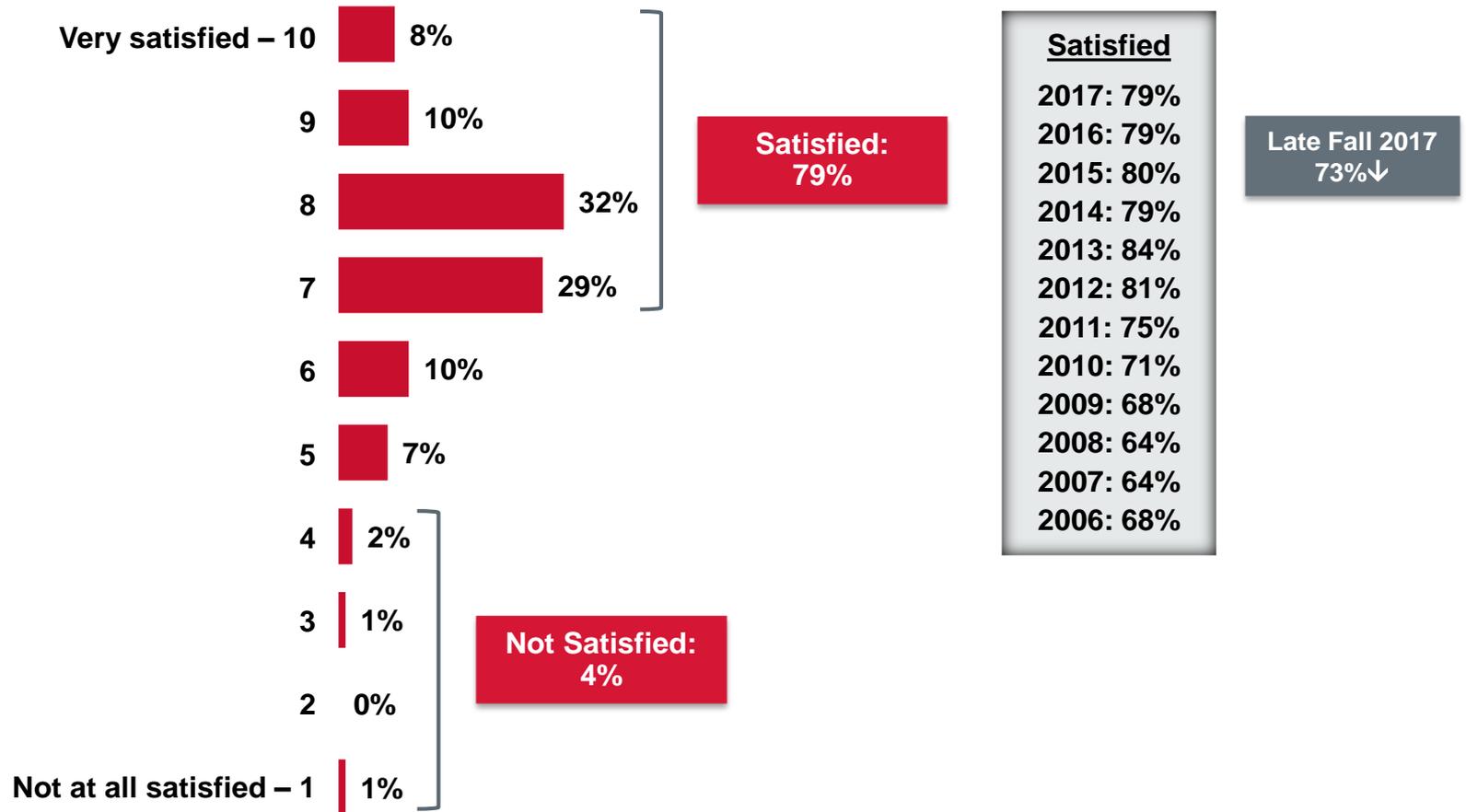
Total mentions <3% are not shown

Thinking about all of the services and programs provided by The City of Calgary, what services come to mind?

Base: Valid respondents (n=2,436)



# Satisfaction with the Overall Level and Quality of City Services and Programs

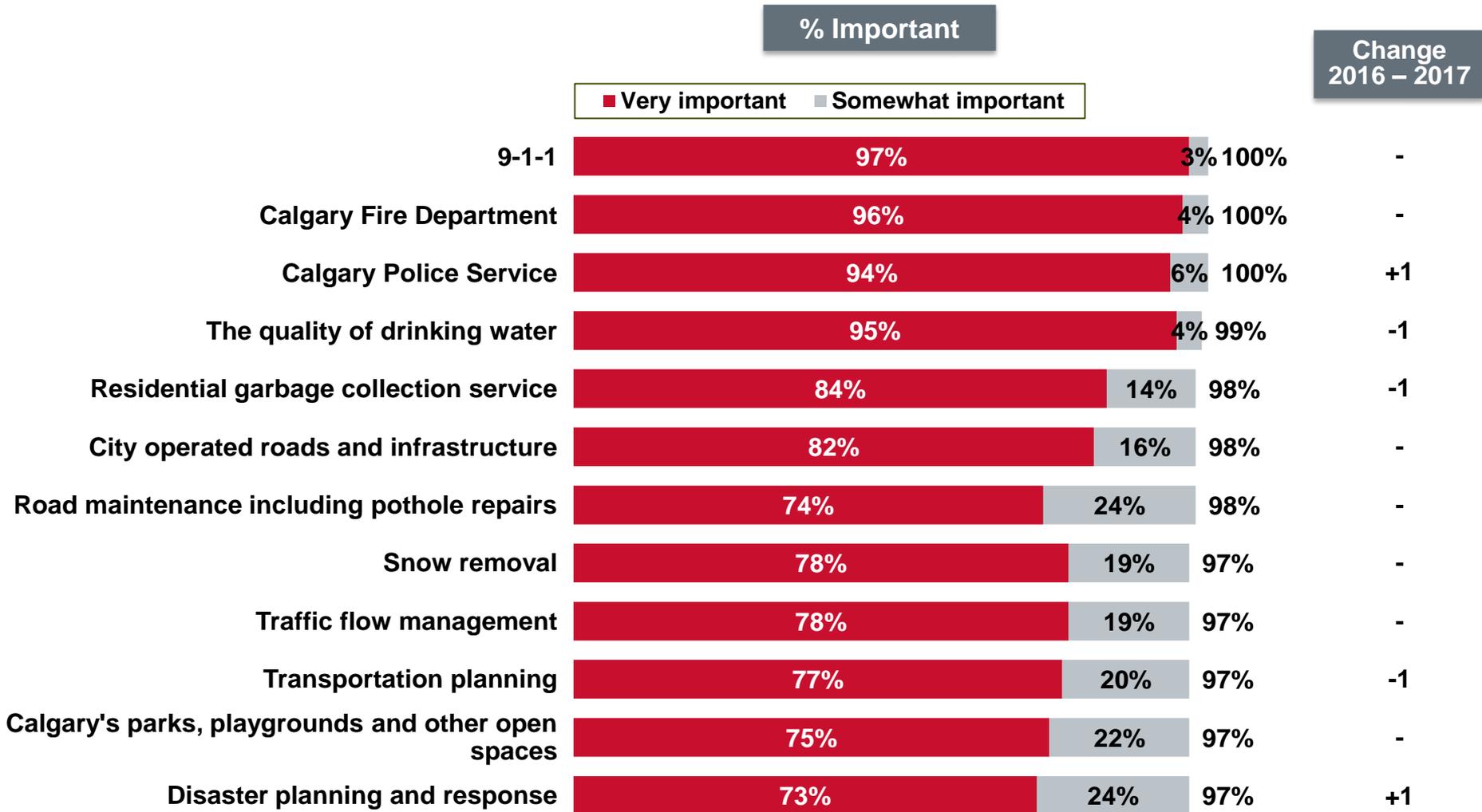


On a scale from “1” to “10” where “1” represents “not at all satisfied” and “10” represents “very satisfied,” how satisfied are you with the overall level and quality of services and programs provided by The City of Calgary?

Base: Valid respondents (n=2,486)



# Importance of City Programs and Services

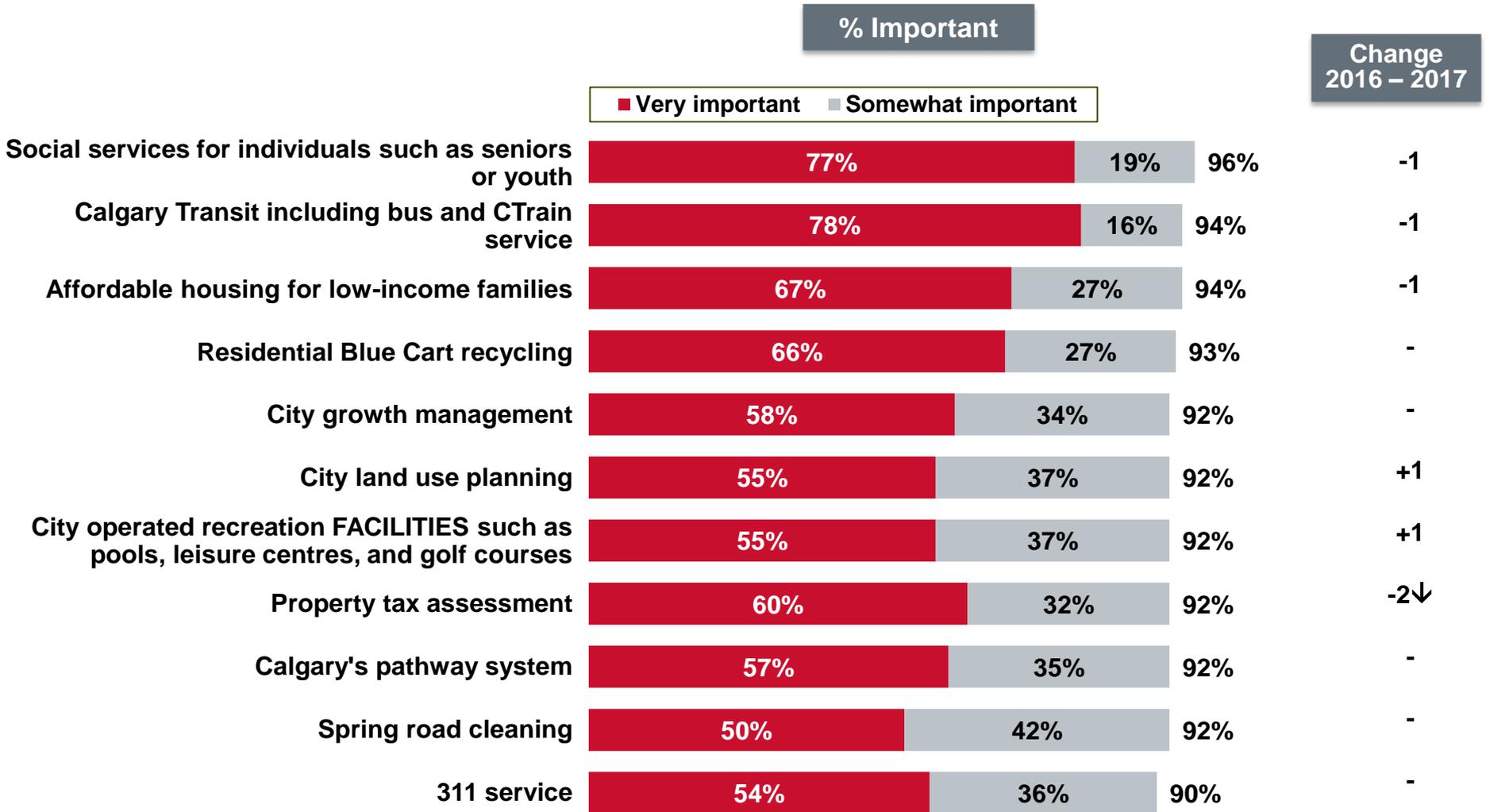


*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)



# Importance of City Programs and Services (continued)



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)

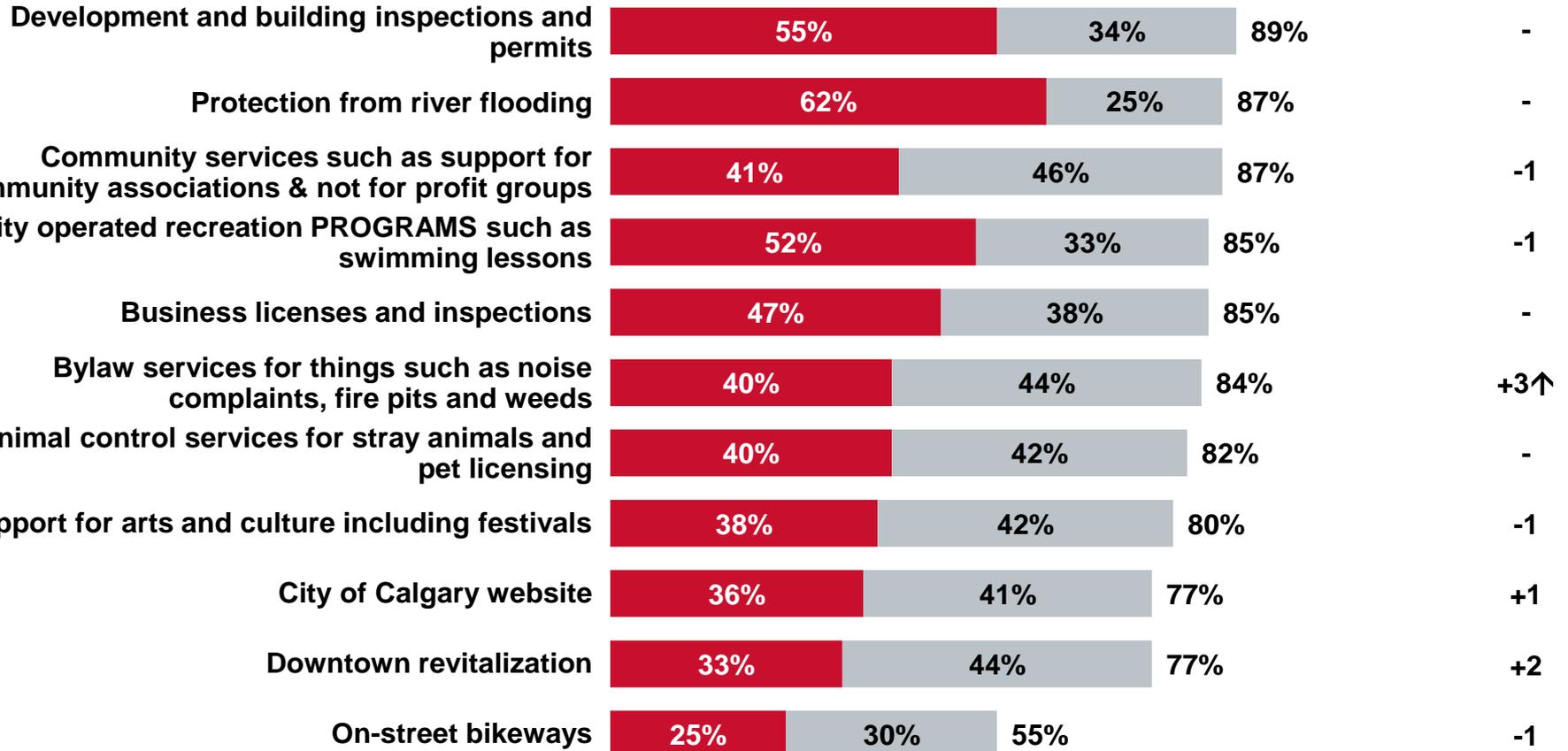


# Importance of City Programs and Services (continued)

% Important

Change  
2016 – 2017

■ Very important ■ Somewhat important

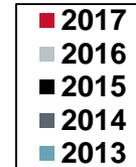
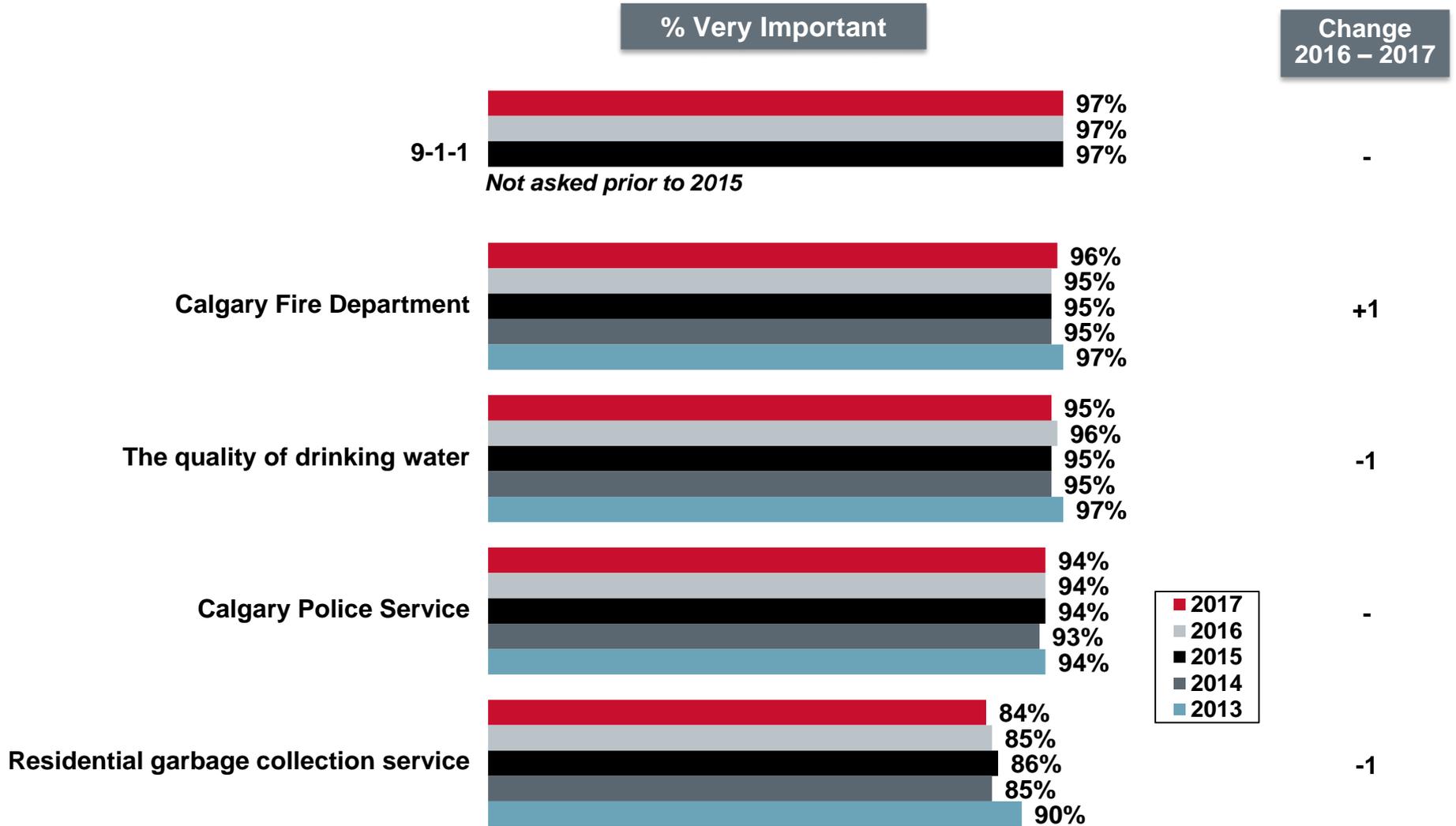


*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)



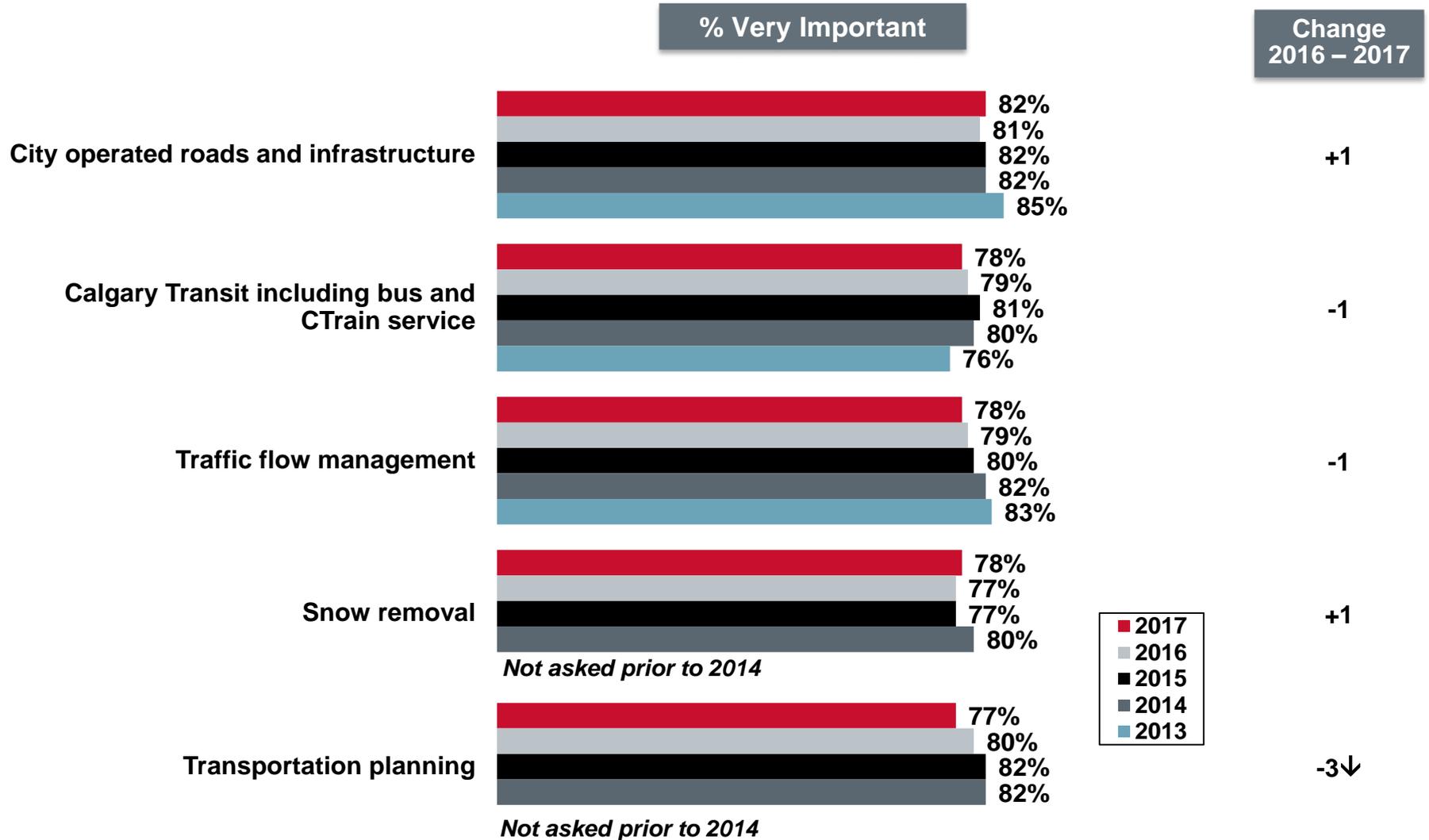
# Tracking Importance of City Programs and Services



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*  
 Base: Valid respondents (Bases vary)



# Tracking Importance of City Programs and Services (continued)



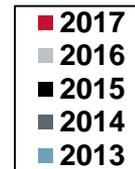
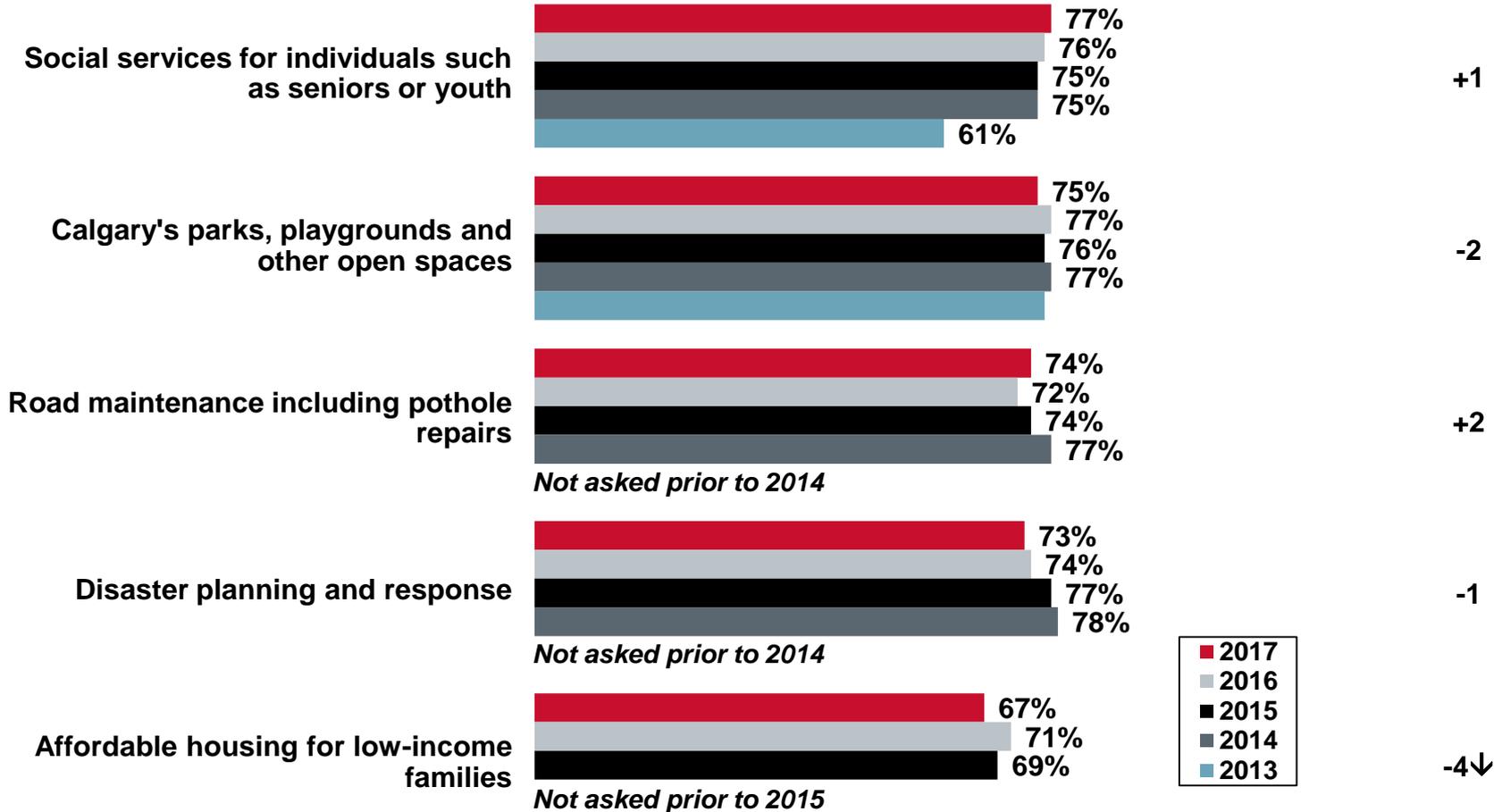
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



# Tracking Importance of City Programs and Services (continued)

% Very Important

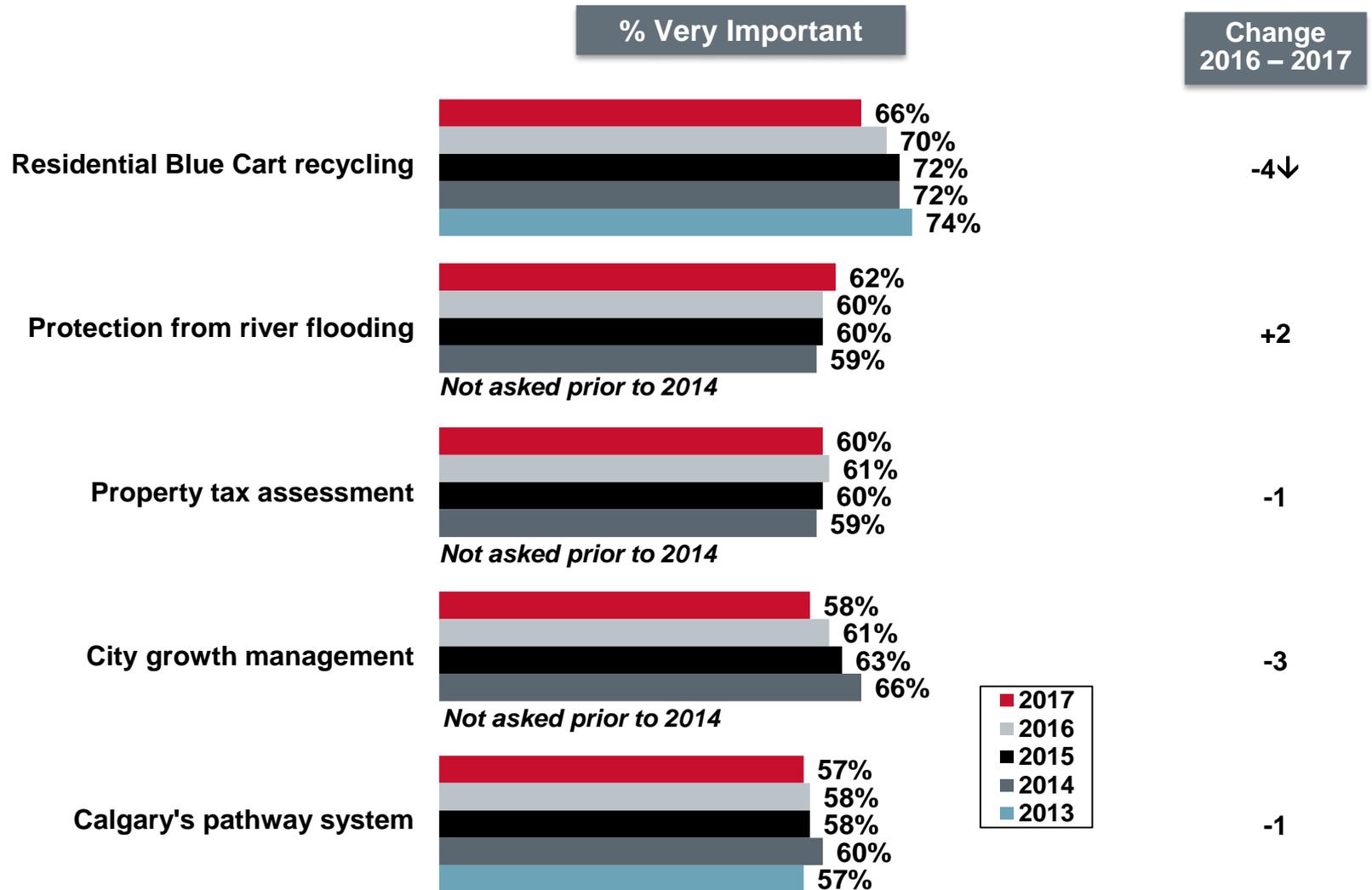
Change  
2016 – 2017



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
Base: Valid respondents (Bases vary)



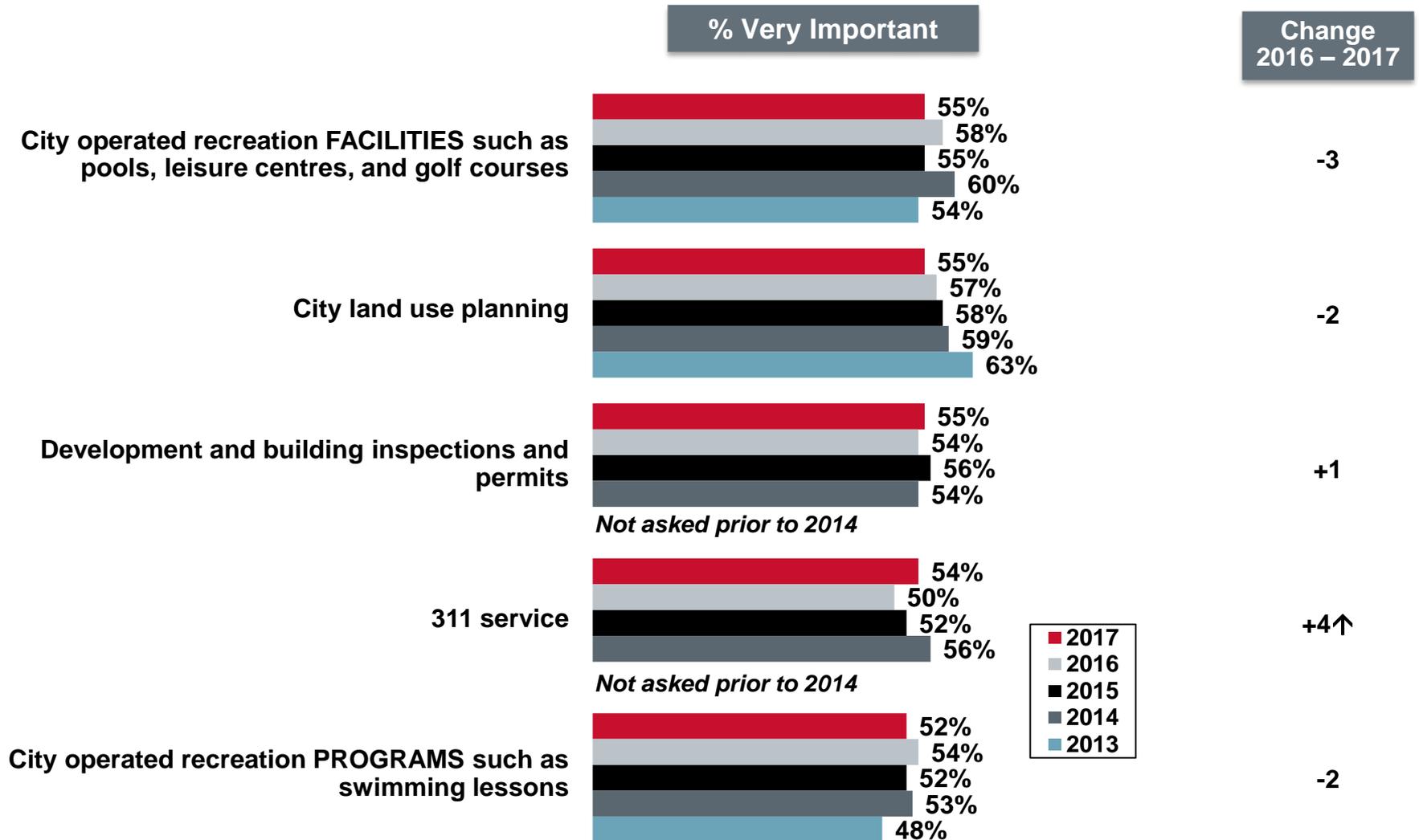
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



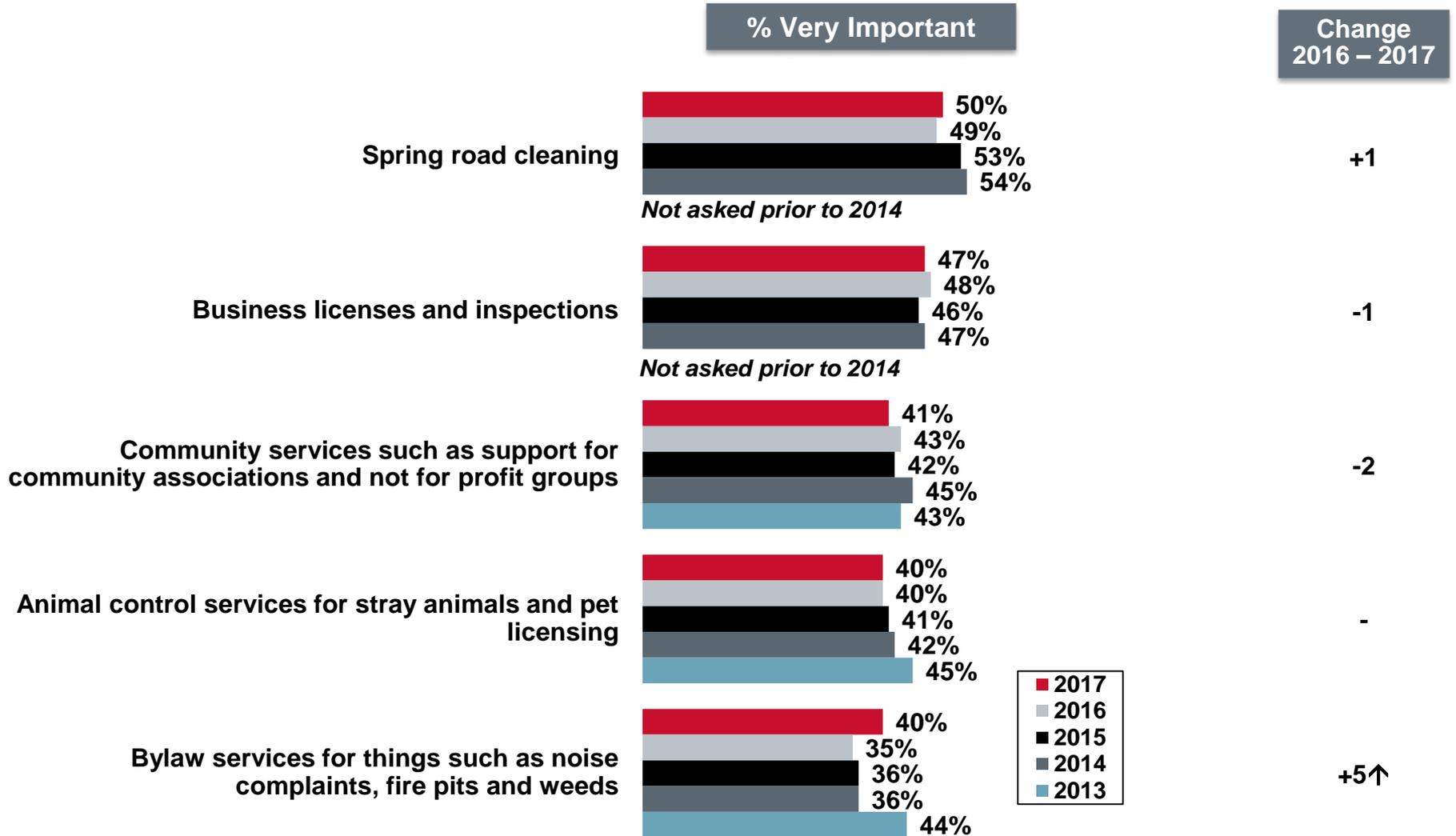
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



# Tracking Importance of City Programs and Services (continued)

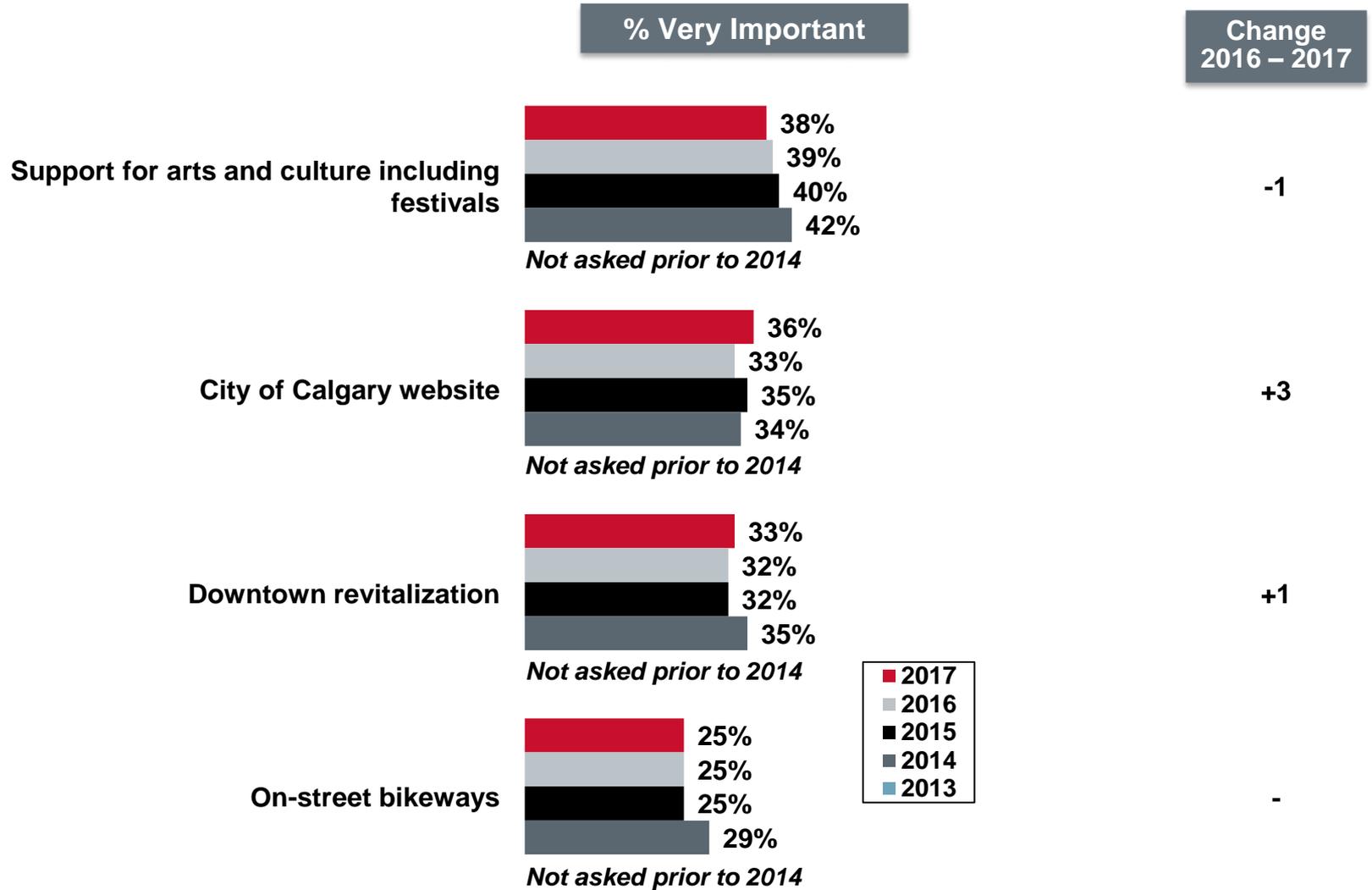


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)



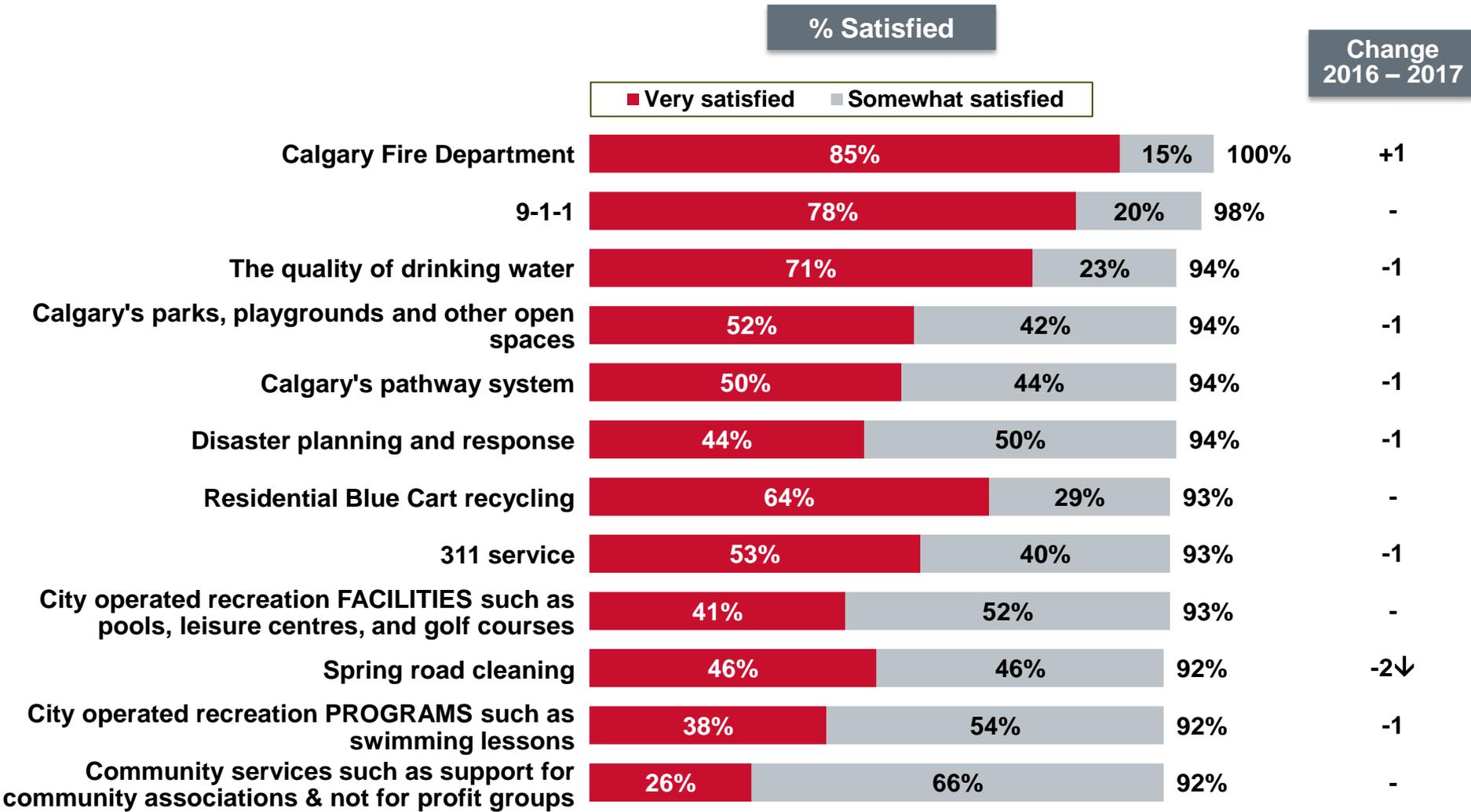
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



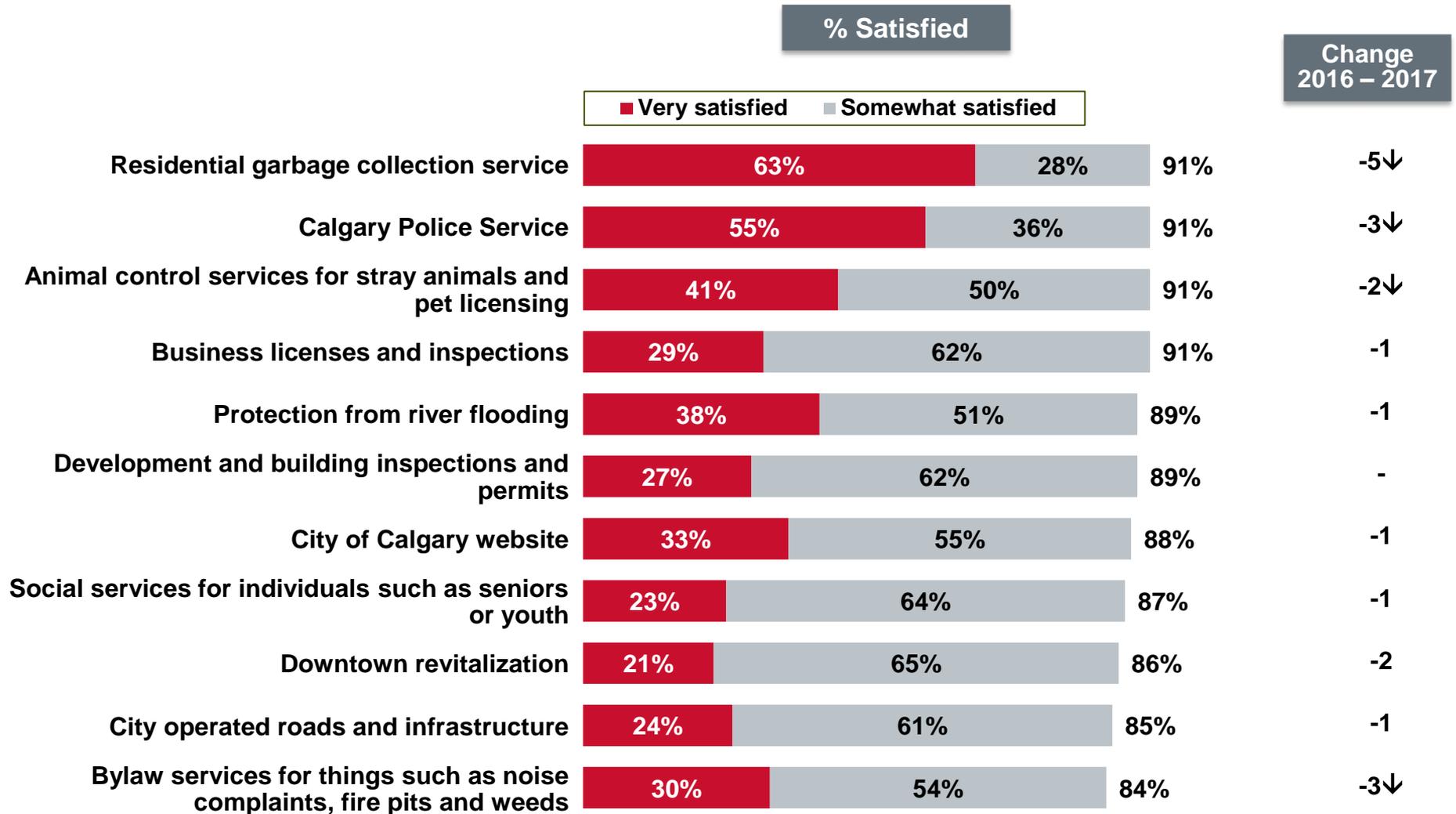
# Satisfaction with City Programs and Services



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
 Base: Valid respondents (Bases vary)



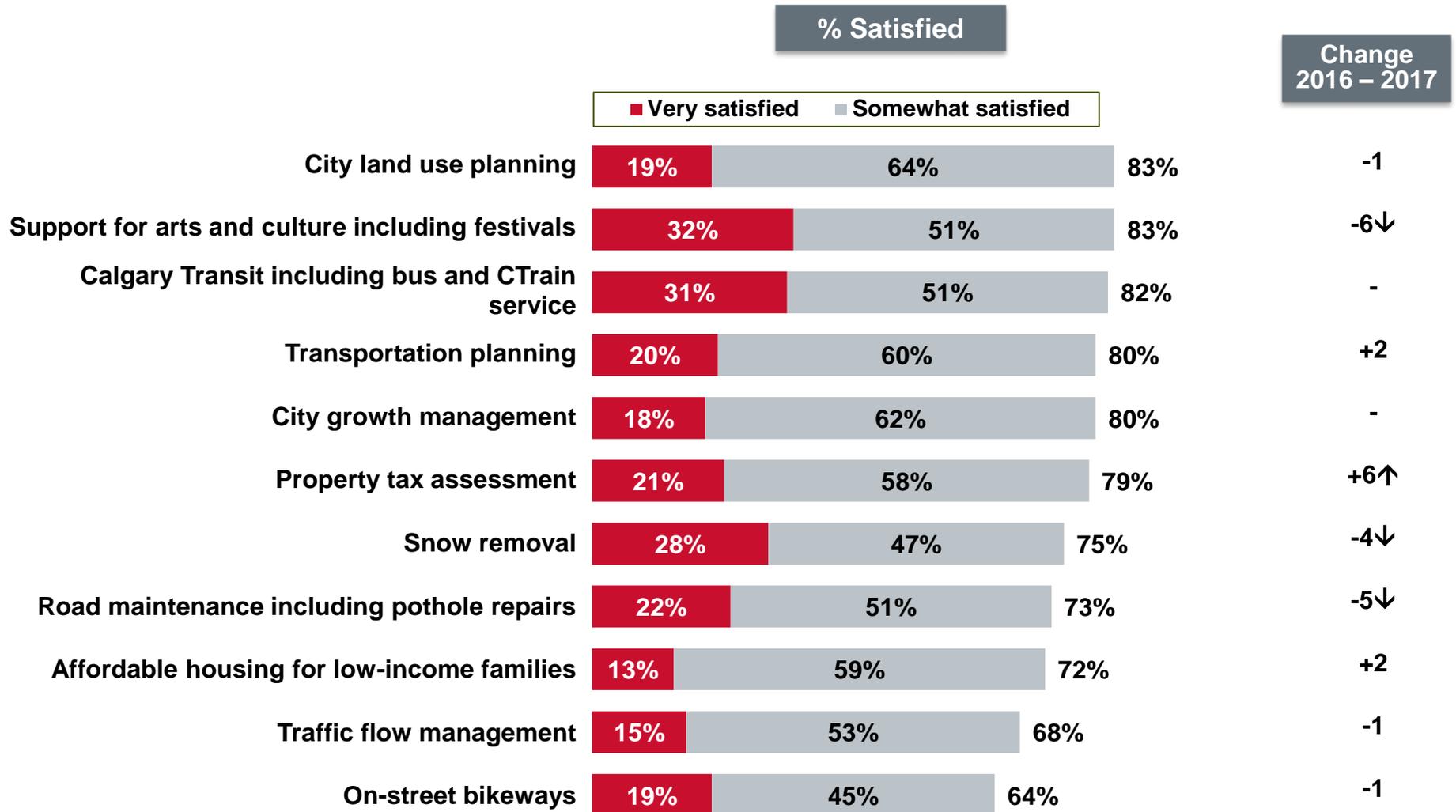
# Satisfaction with City Programs and Services (continued)



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
Base: Valid respondents (Bases vary)



# Satisfaction with City Programs and Services (continued)



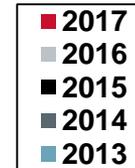
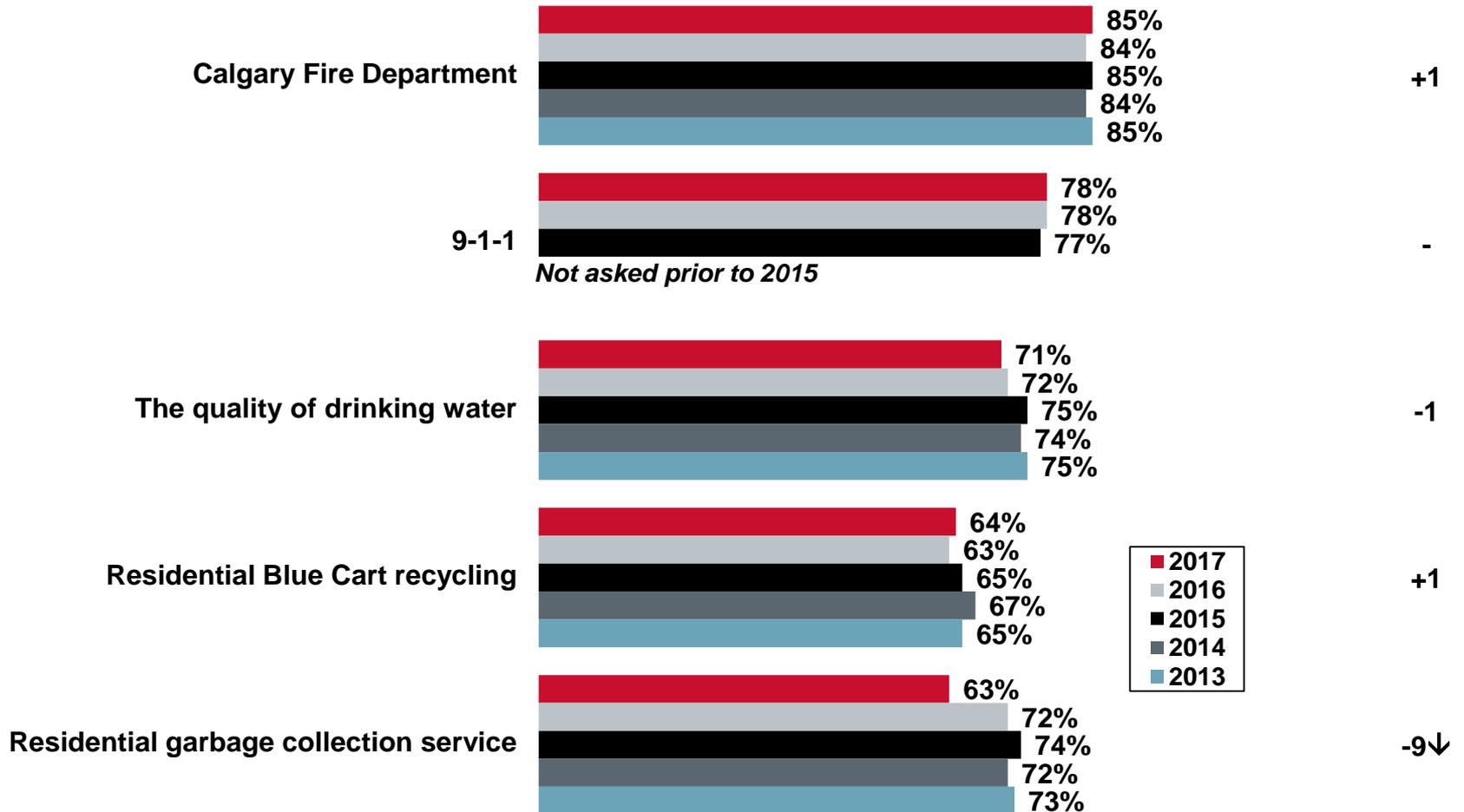
*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
Base: Valid respondents (Bases vary)



# Tracking Satisfaction with City Programs and Services

% Very Satisfied

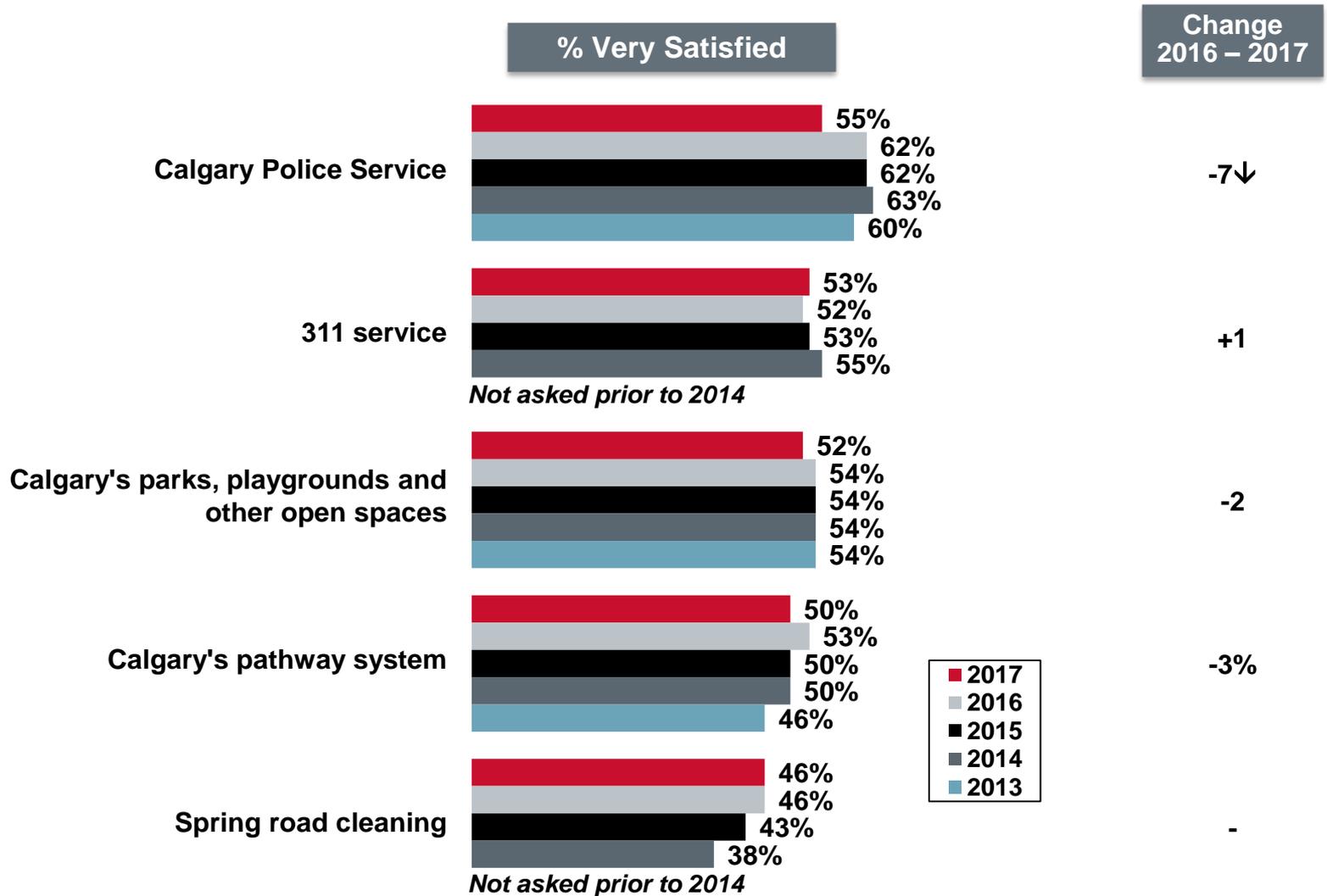
Change  
2016 – 2017



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



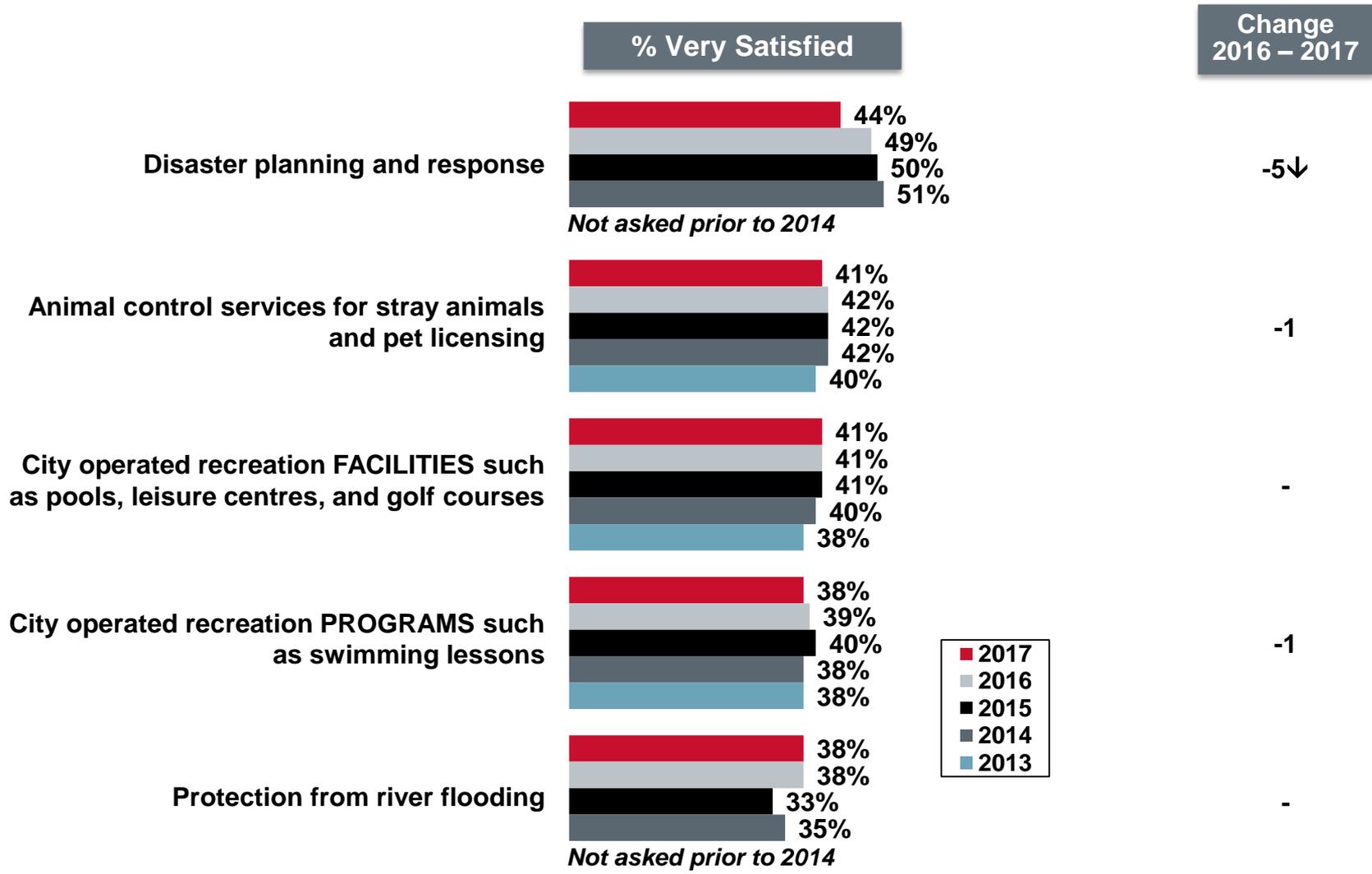
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.  
 Base: Valid respondents (Bases vary)



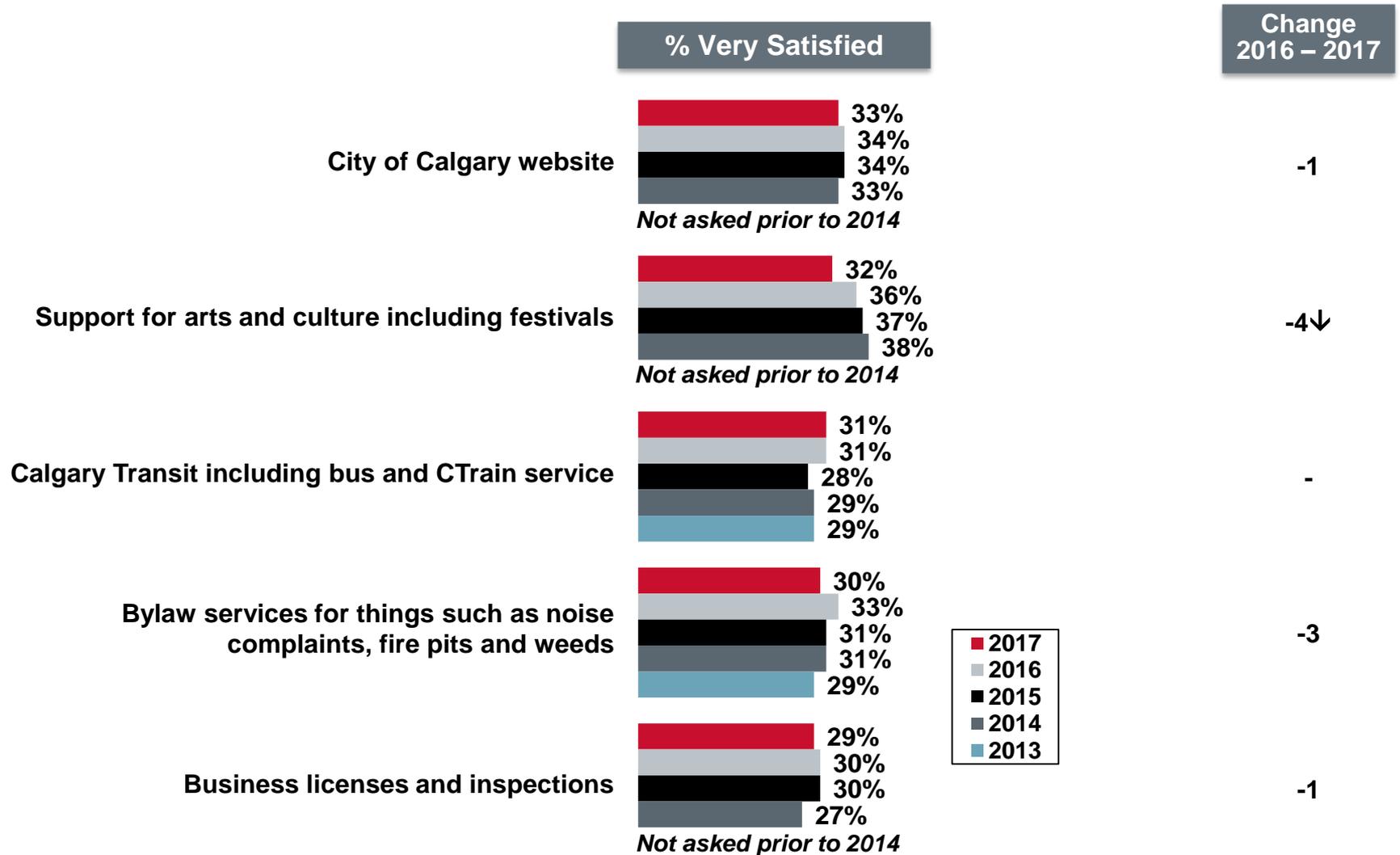
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



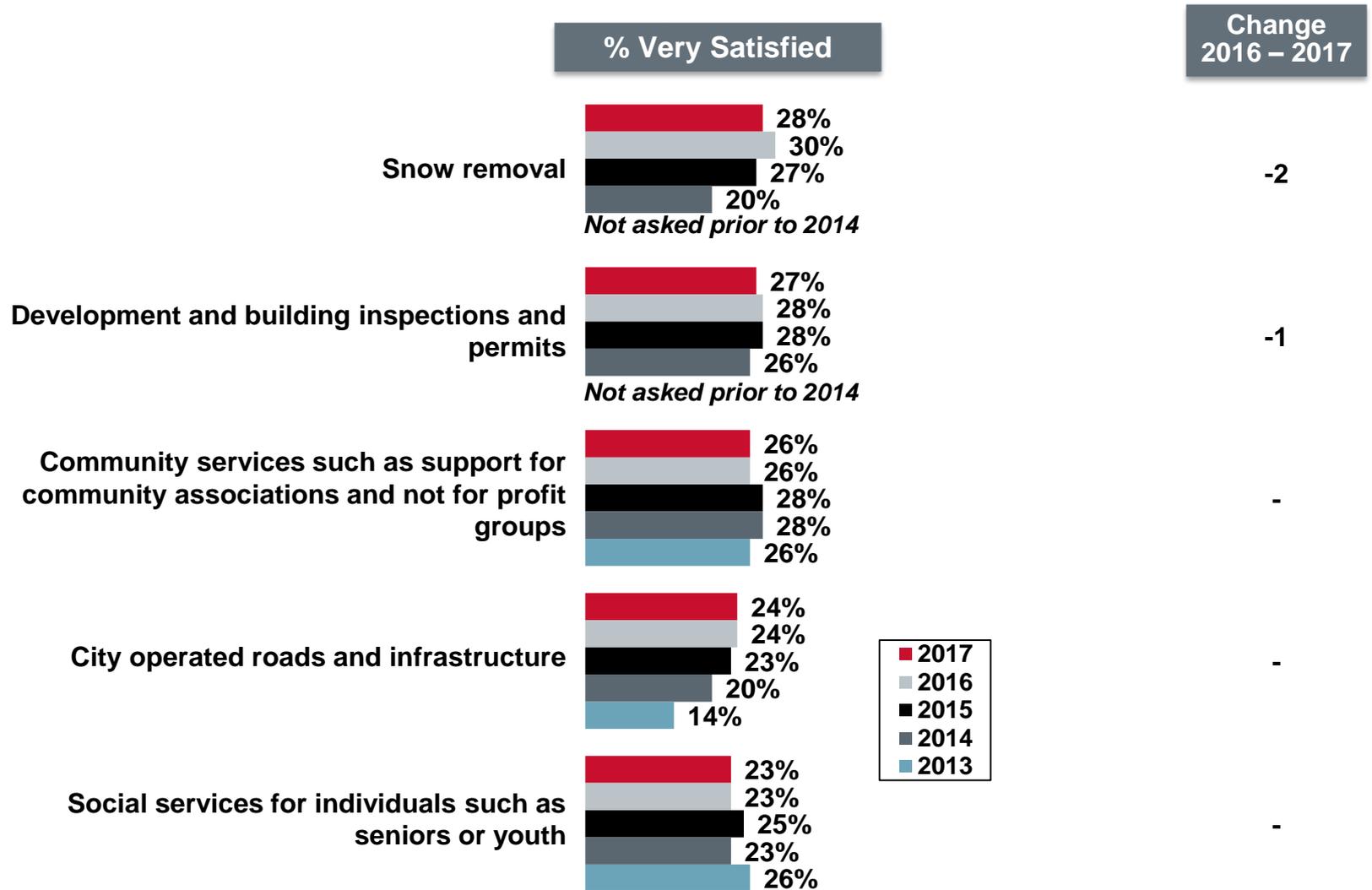
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



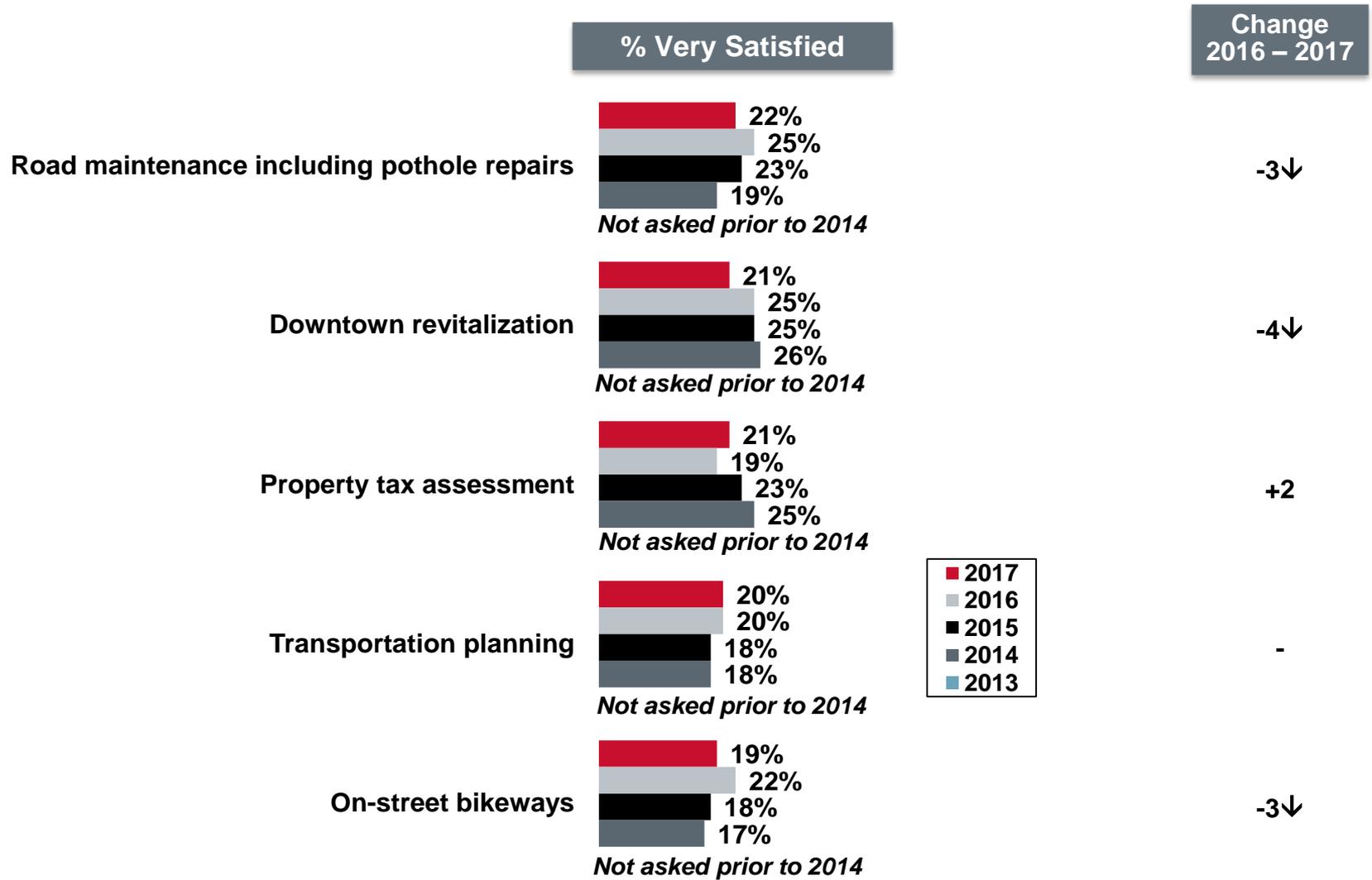
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



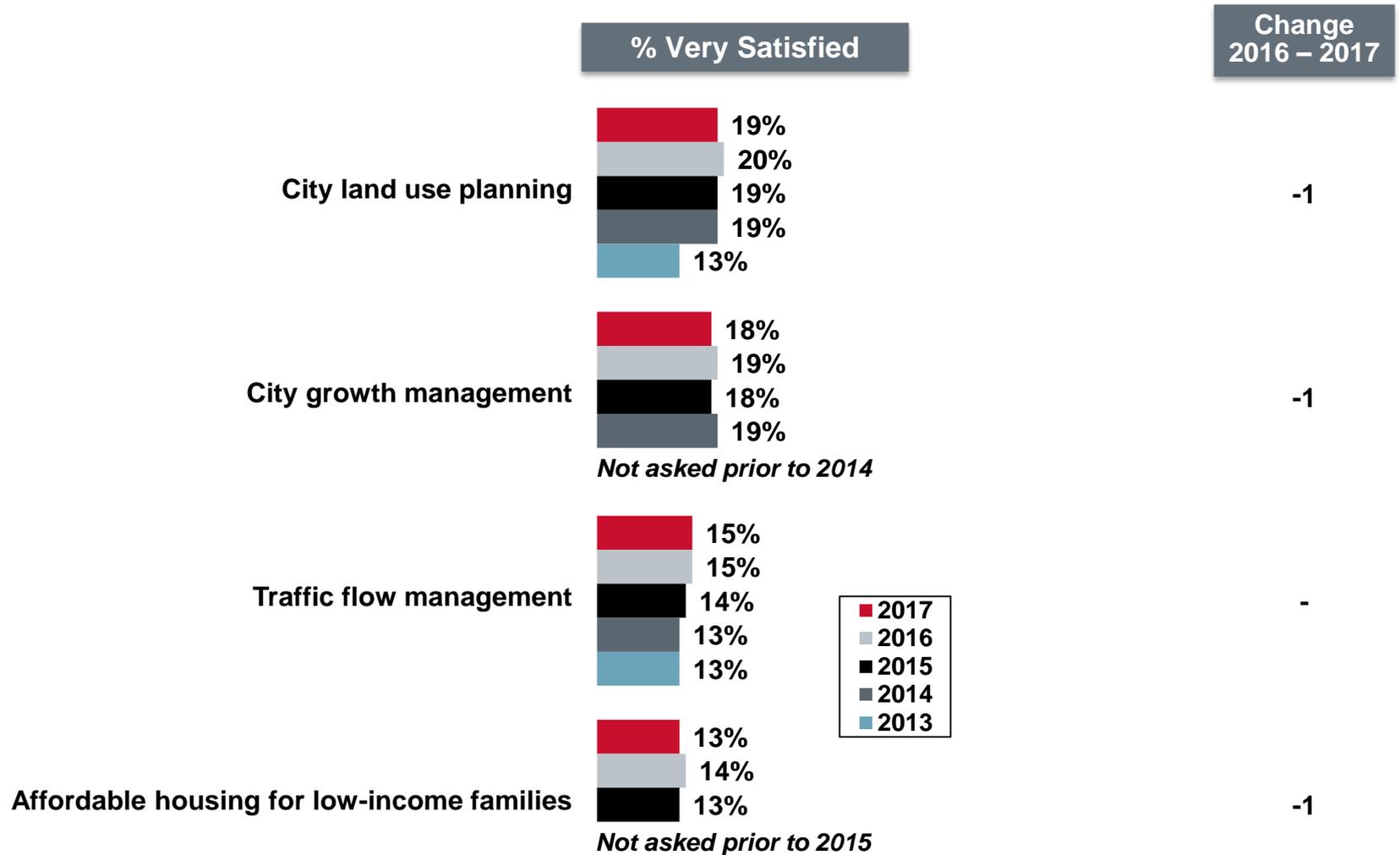
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



# Tracking Satisfaction with City Programs and Services (continued)



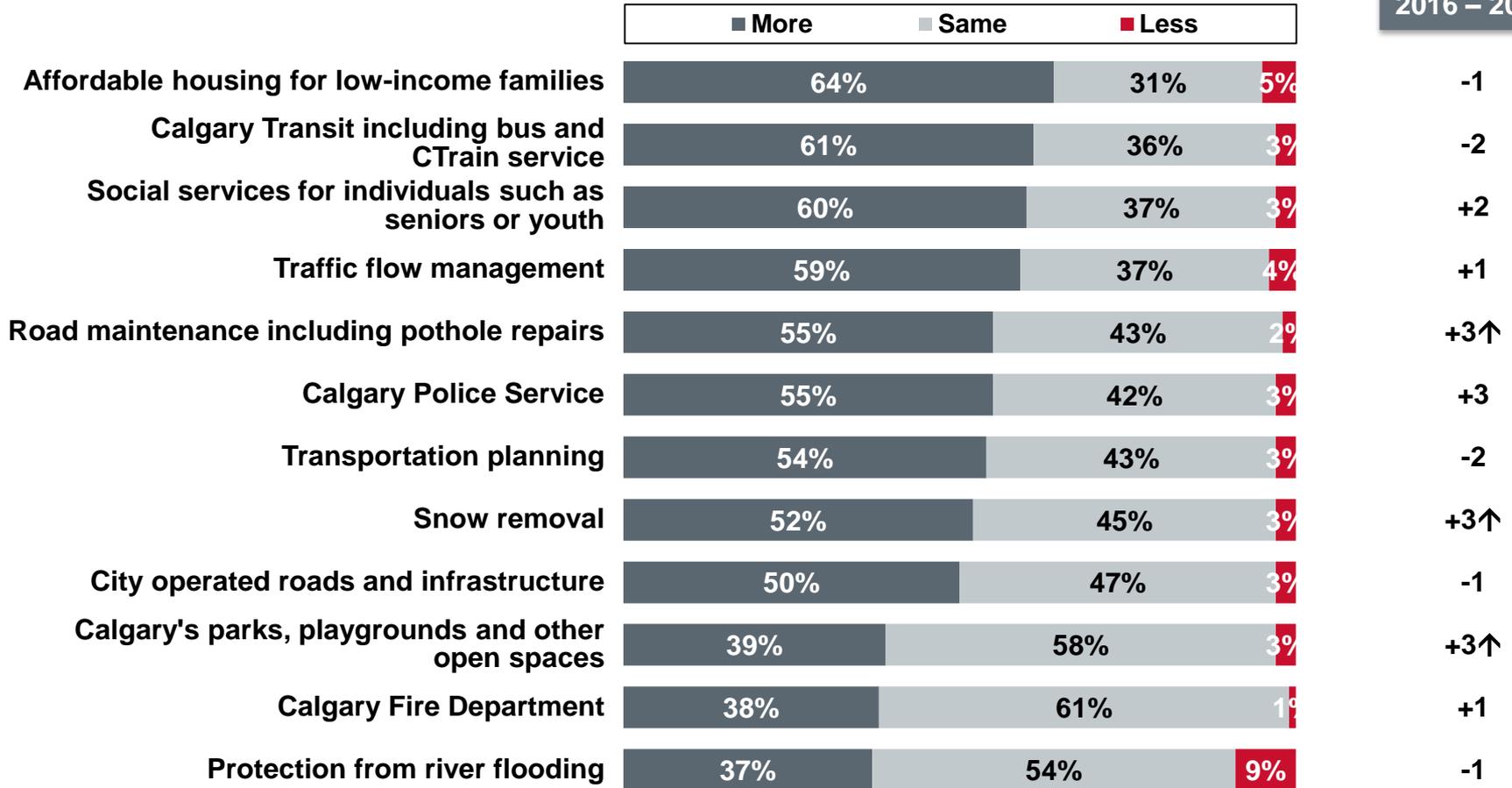
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



# Investment in City Programs and Services

**Invest More**

Change  
2016 – 2017



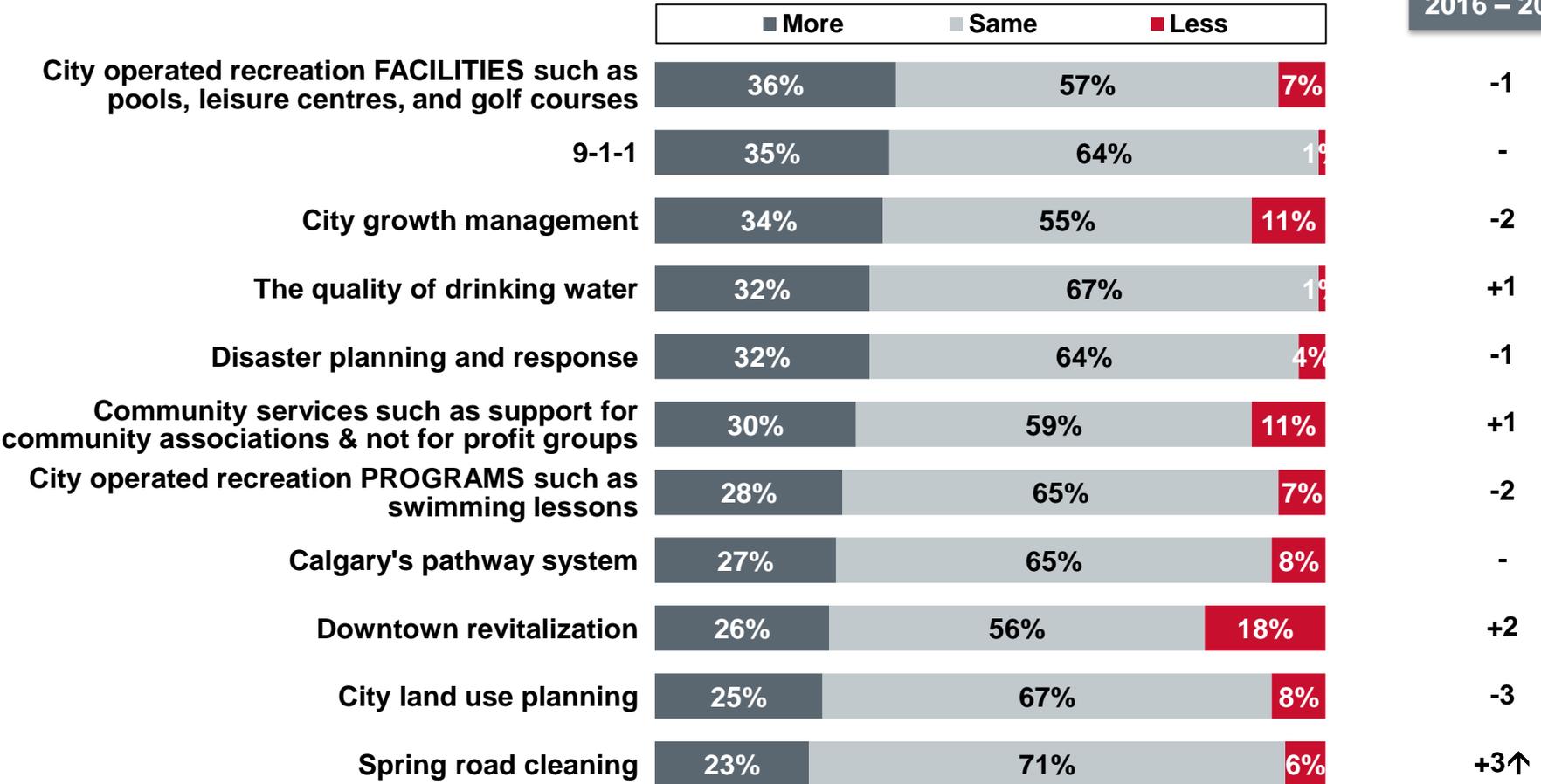
*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.*  
 Base: Valid respondents (Bases vary)



# Investment in City Programs and Services (continued)

Invest More

Change  
2016 – 2017



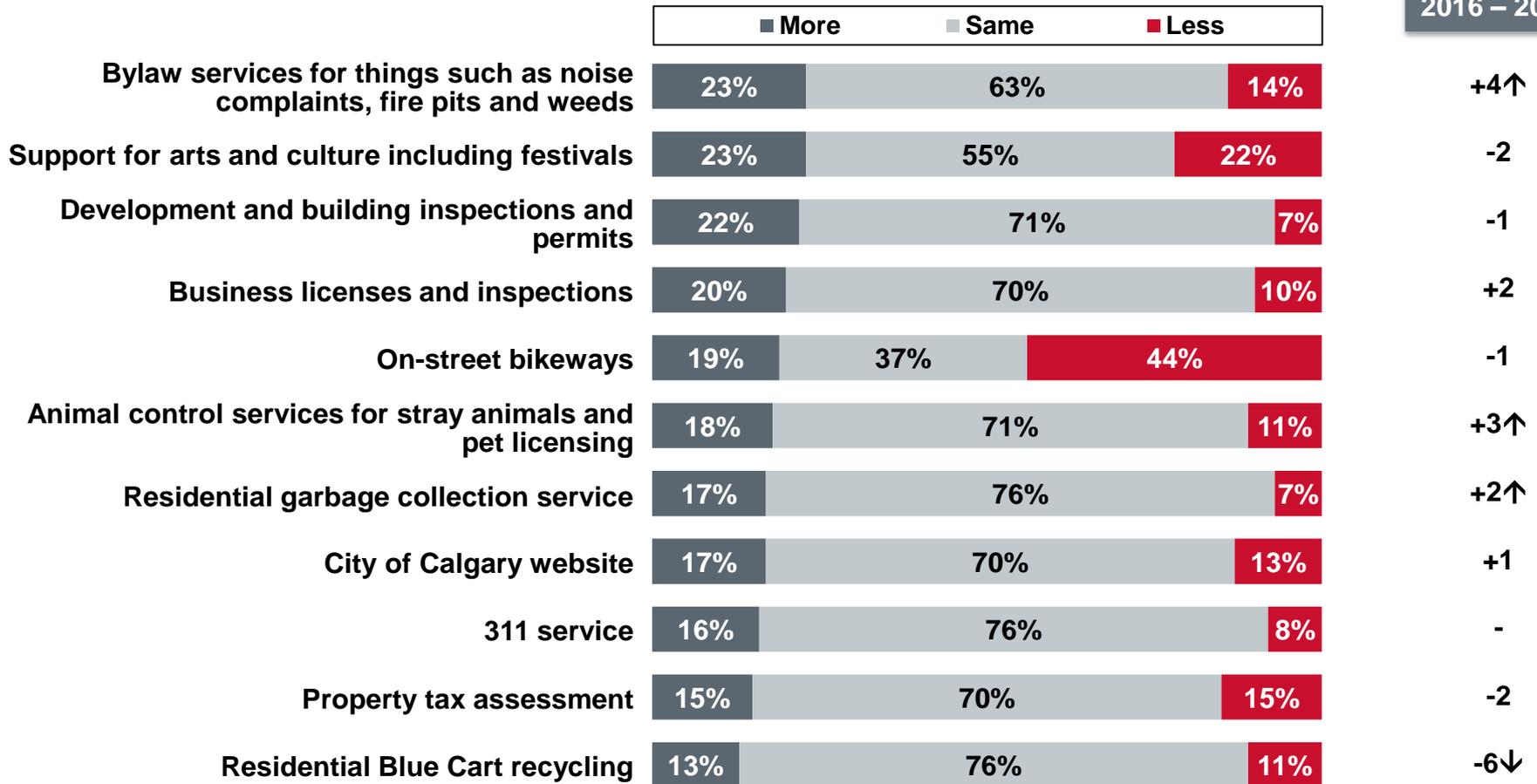
*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.*  
Base: Valid respondents (Bases vary)



# Investment in City Programs and Services (continued)

Invest More

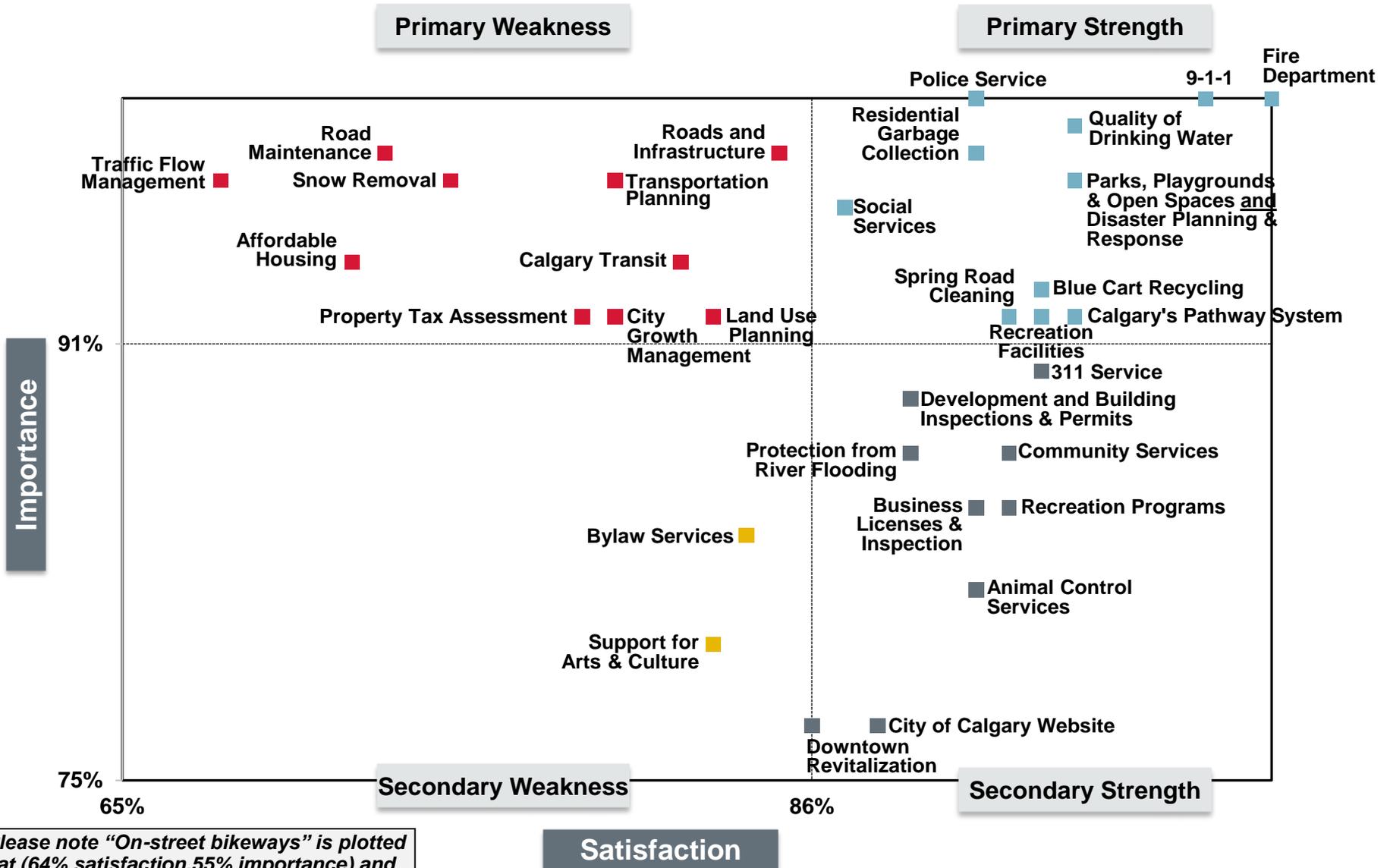
Change  
2016 – 2017



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.*  
Base: Valid respondents (Bases vary)



# Importance vs. Satisfaction Grid



Please note "On-street bikeways" is plotted at (64% satisfaction, 55% importance) and not illustrated on this graph.

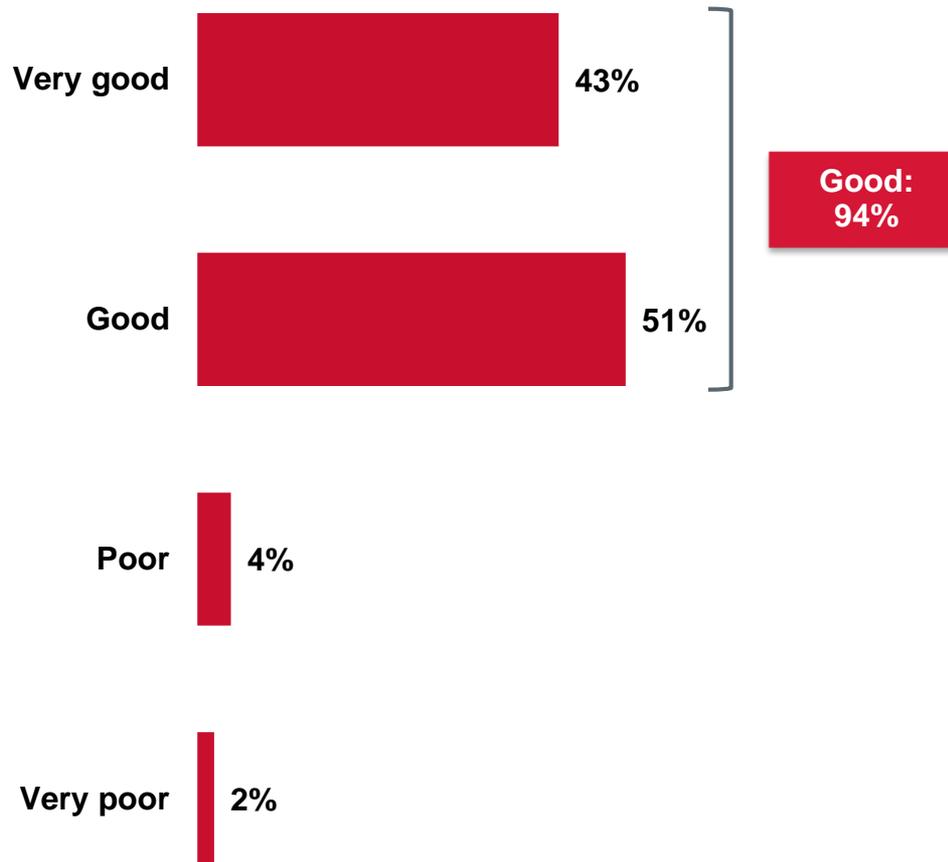


## Environmental Performance





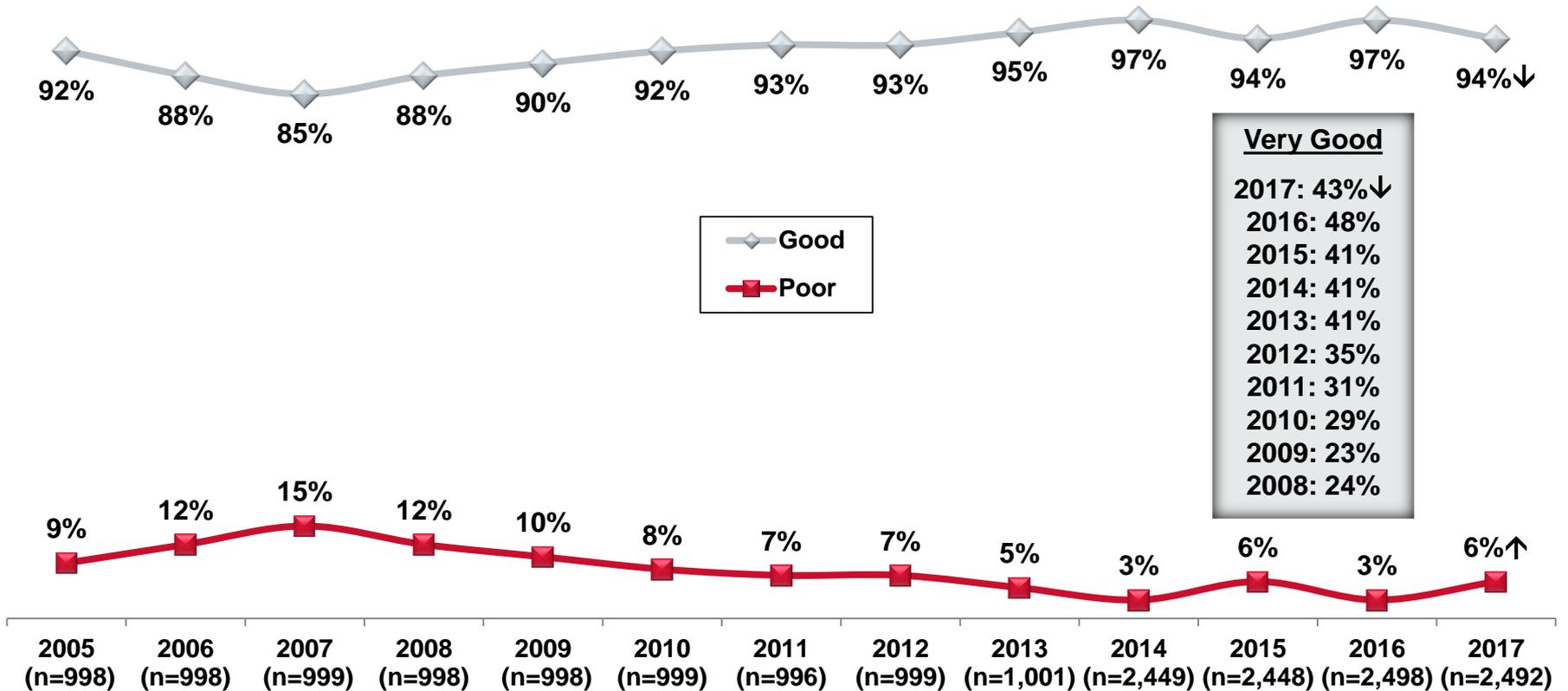
# Perceptions About Overall State of Calgary's Environment



*Thinking about things such as air, water and land quality in the city, how would you rate the overall state of Calgary's environment today?*  
 Base: Valid respondents (n=2,492)



# Tracking Perceptions About Overall State of Calgary's Environment

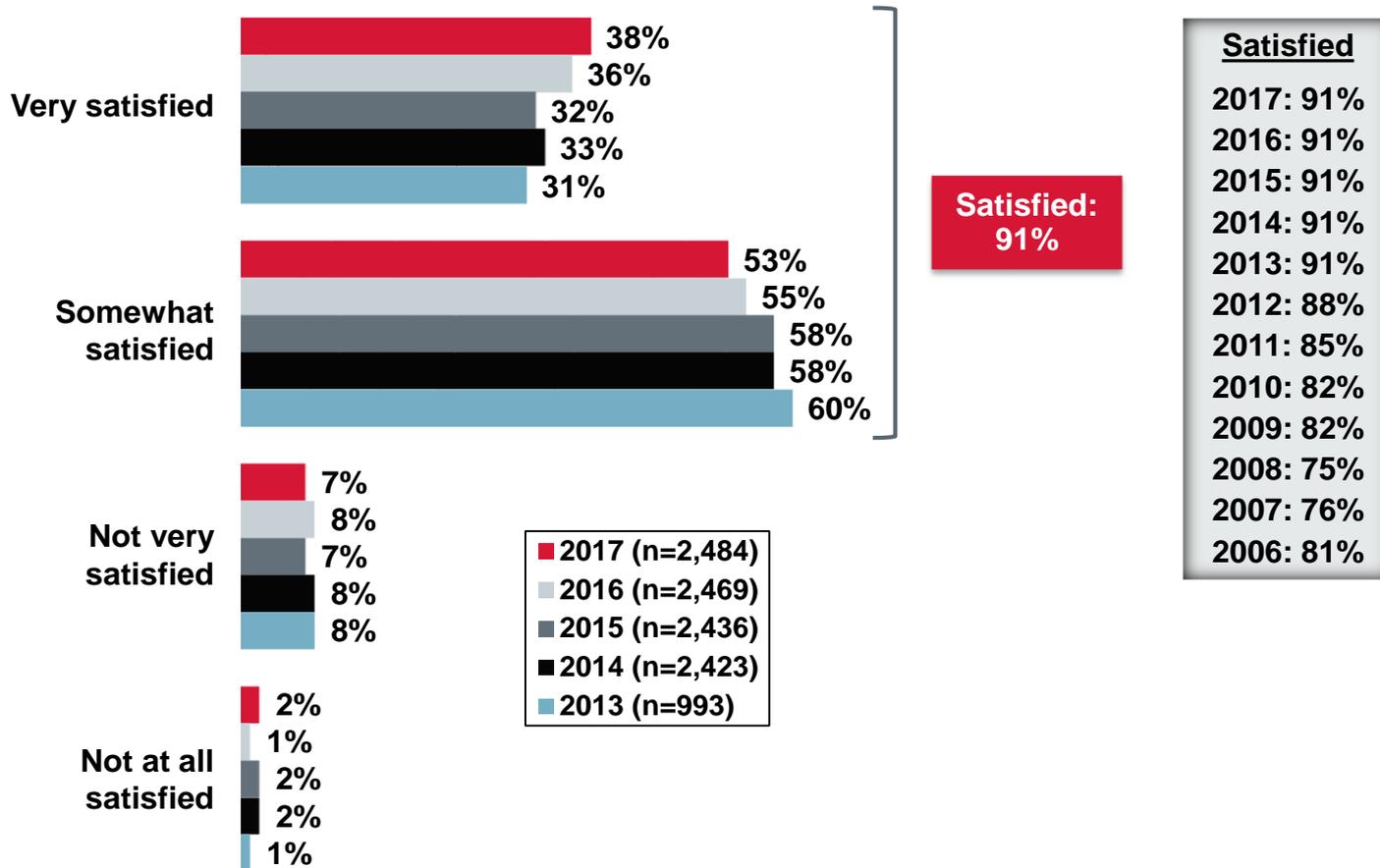


**Very Good**  
 2017: 43%↓  
 2016: 48%  
 2015: 41%  
 2014: 41%  
 2013: 41%  
 2012: 35%  
 2011: 31%  
 2010: 29%  
 2009: 23%  
 2008: 24%

Thinking about things such as air, water and land quality in the city, how would you rate the overall state of Calgary's environment today?  
 Base: Valid respondents



# Satisfaction with The City's Environmental Performance

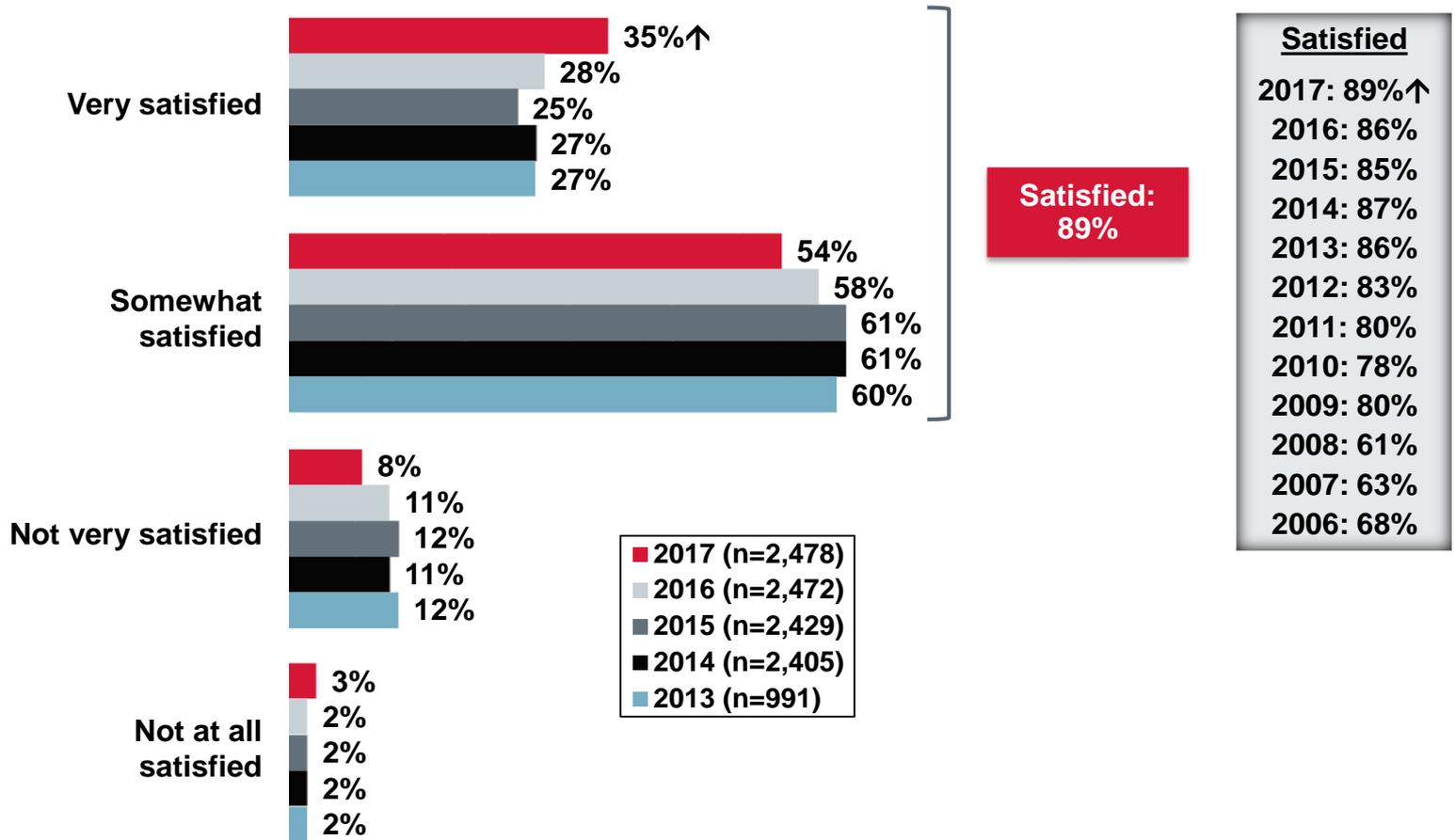


How satisfied are you with the job The City of Calgary is currently doing to protect the environment?

Base: Valid respondents



# Satisfaction with The City's Environmental Programs and Services



How satisfied are you with The City of Calgary's programs and services aimed at helping Calgarians reduce their environmental impact?  
 Base: Valid respondents

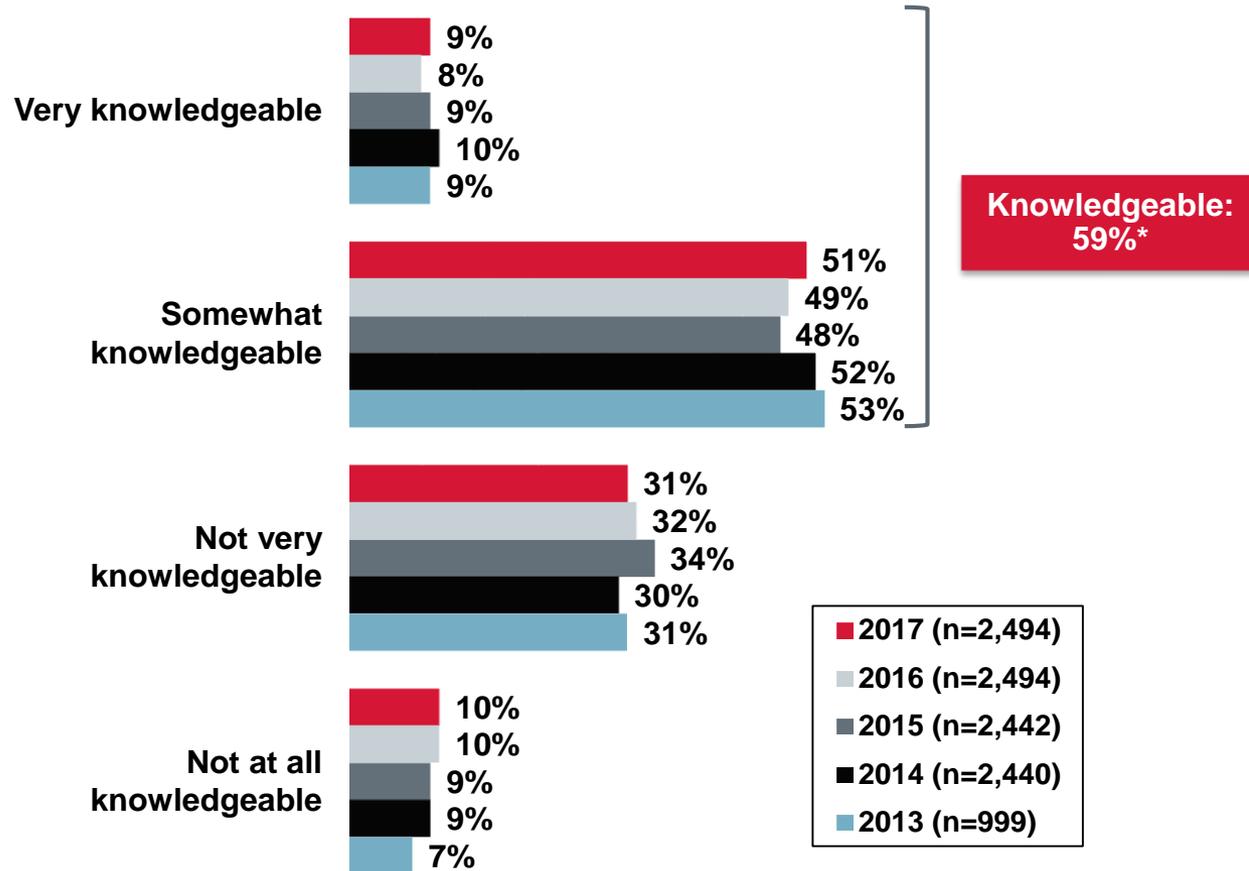


# Taxation





# Knowledge Levels of Tax Dollar Spending



| Knowledgeable |     |
|---------------|-----|
| 2017:         | 59% |
| 2016:         | 57% |
| 2015:         | 57% |
| 2014:         | 61% |
| 2013:         | 62% |
| 2012:         | 60% |
| 2011:         | 59% |
| 2010:         | 60% |
| 2009:         | 63% |
| 2008:         | 59% |
| 2007:         | 60% |
| 2006:         | 61% |

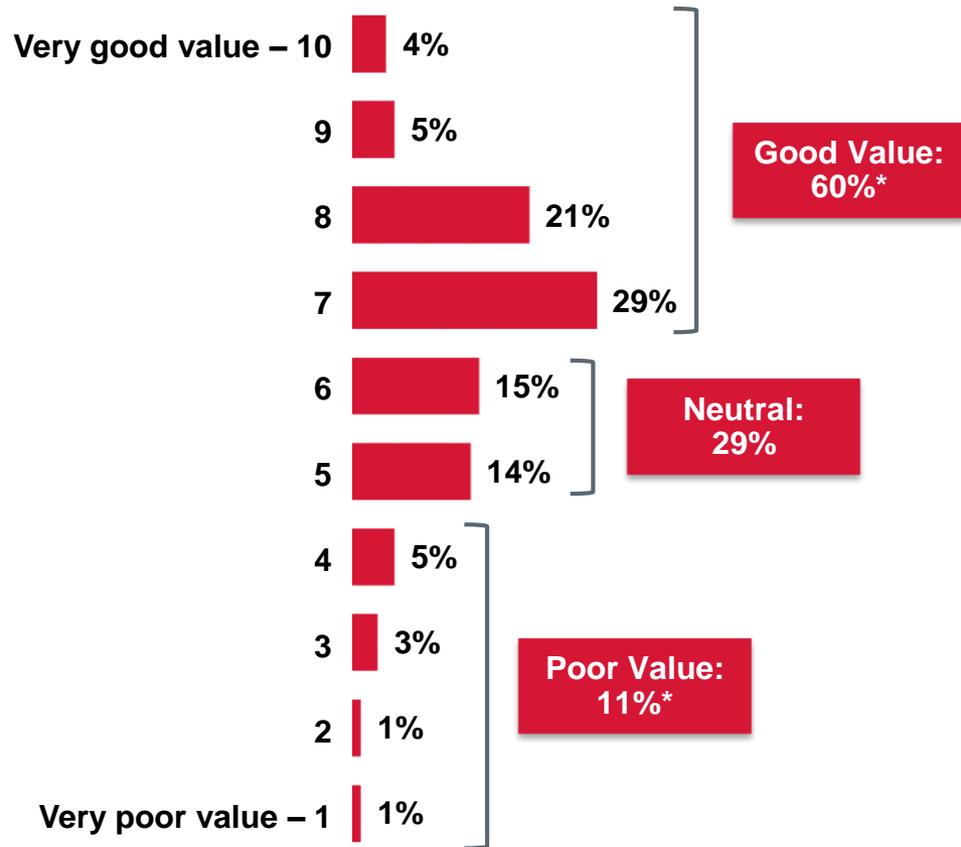
\*Rounding

Thinking about how The City of Calgary government is run, and what services it provides, would you say you are very, somewhat, not very, or not at all knowledgeable about how City tax dollars are spent?

Base: Valid respondents



# Perceived Value of Property Taxes



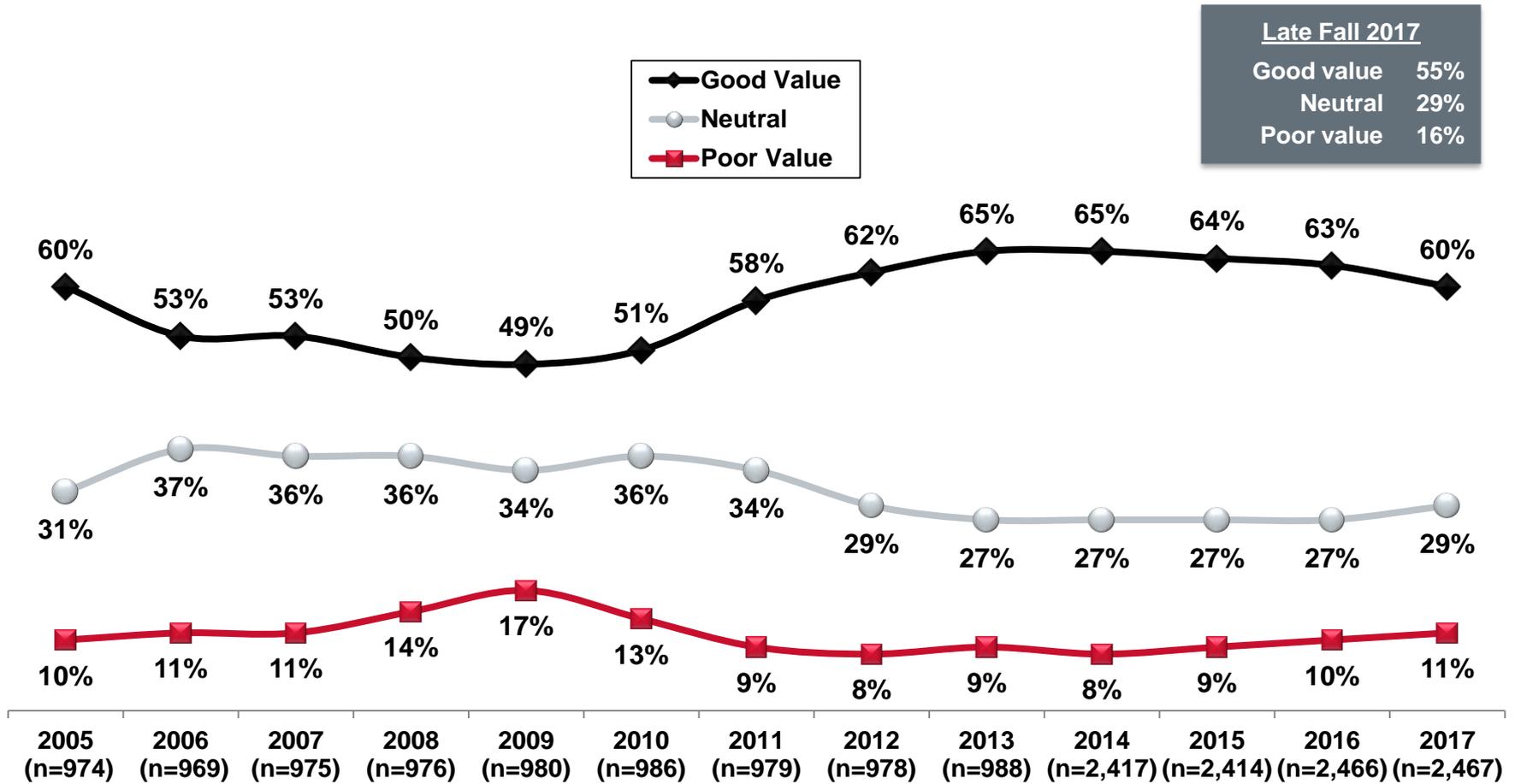
\*Rounding

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”.

Base: Valid respondents (n=2,467)



# Tracking Perceived Value of Property Taxes



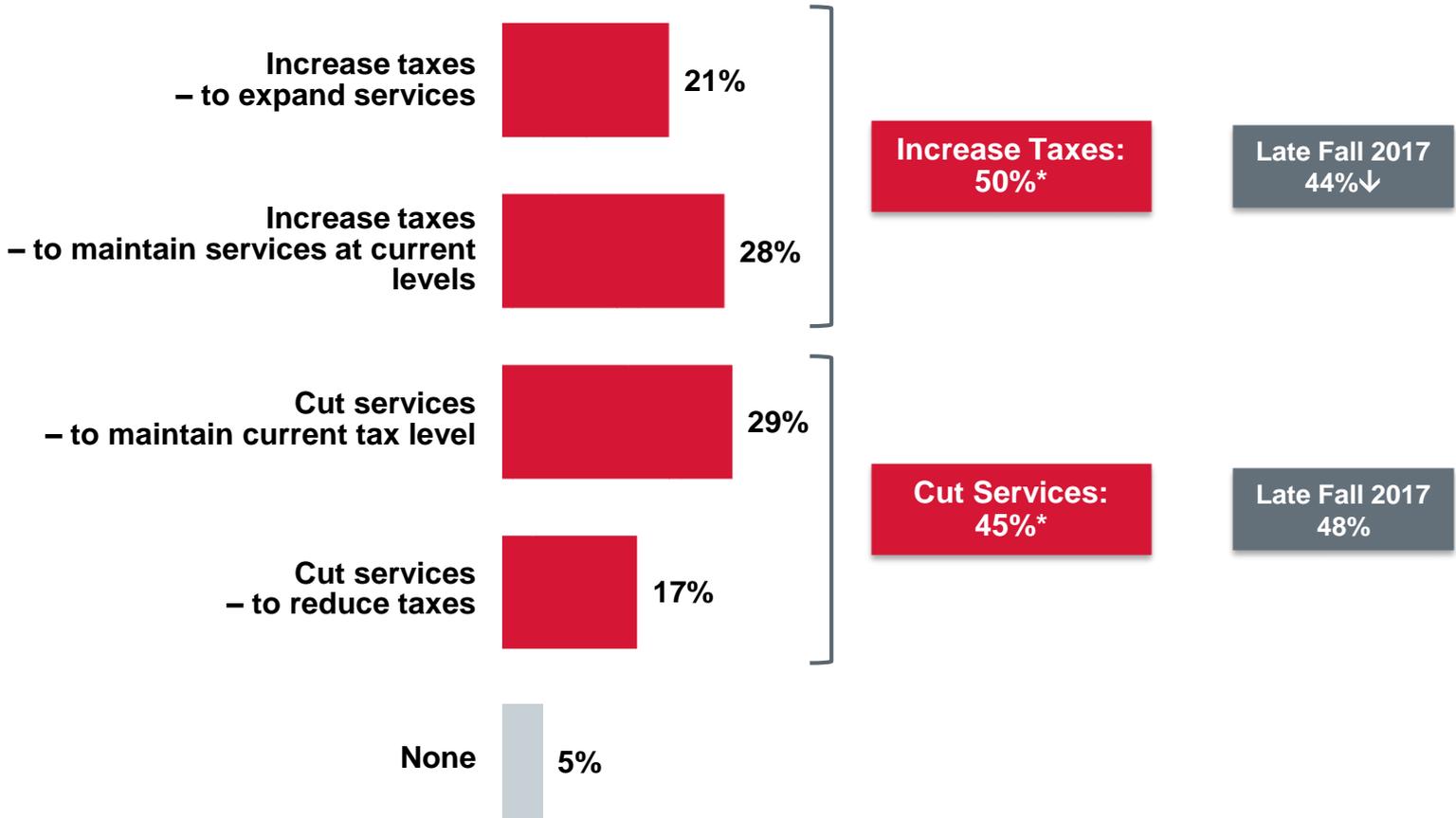
| Late Fall 2017 |     |
|----------------|-----|
| Good value     | 55% |
| Neutral        | 29% |
| Poor value     | 16% |

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”.

Base: Valid respondents



# Balancing Taxation and Service Delivery Levels



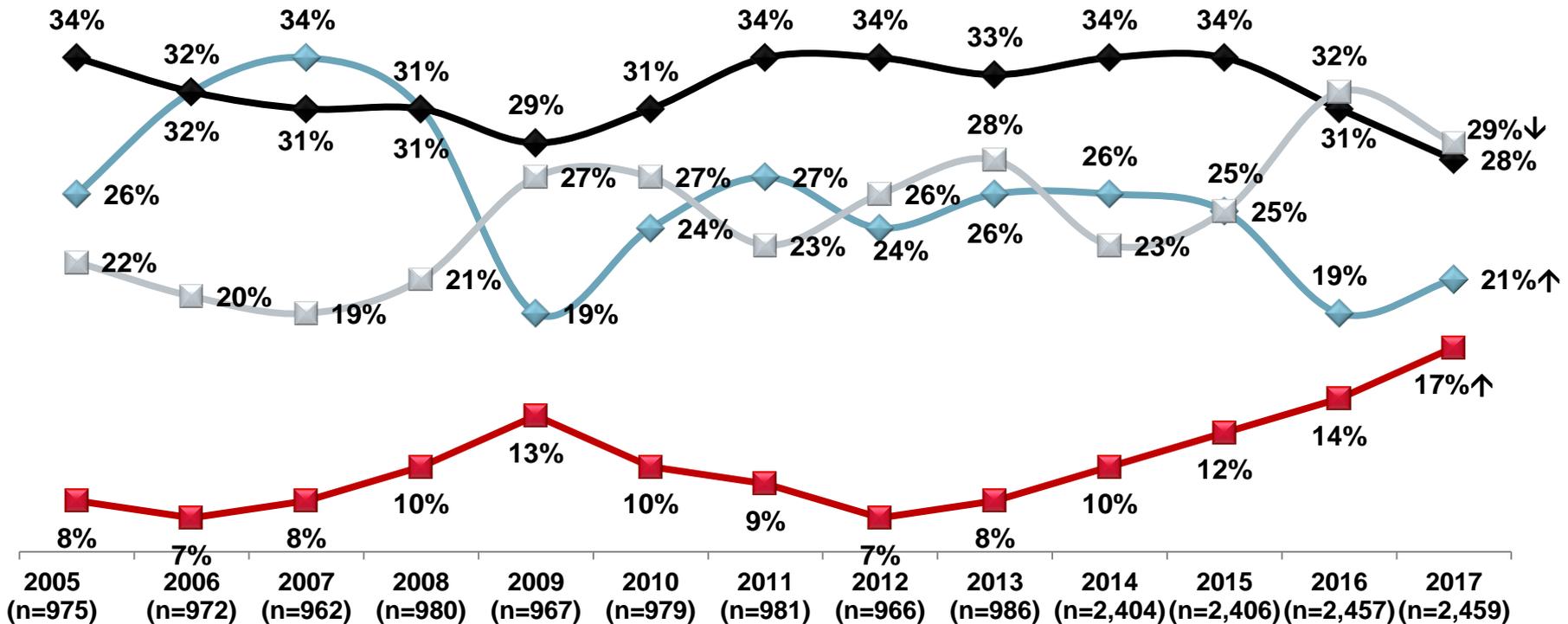
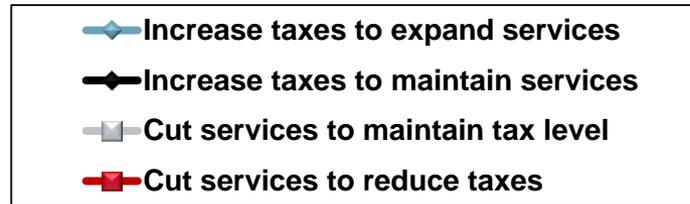
\*Rounding

*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=2,459)



# Tracking Balancing Taxation and Service Delivery Levels

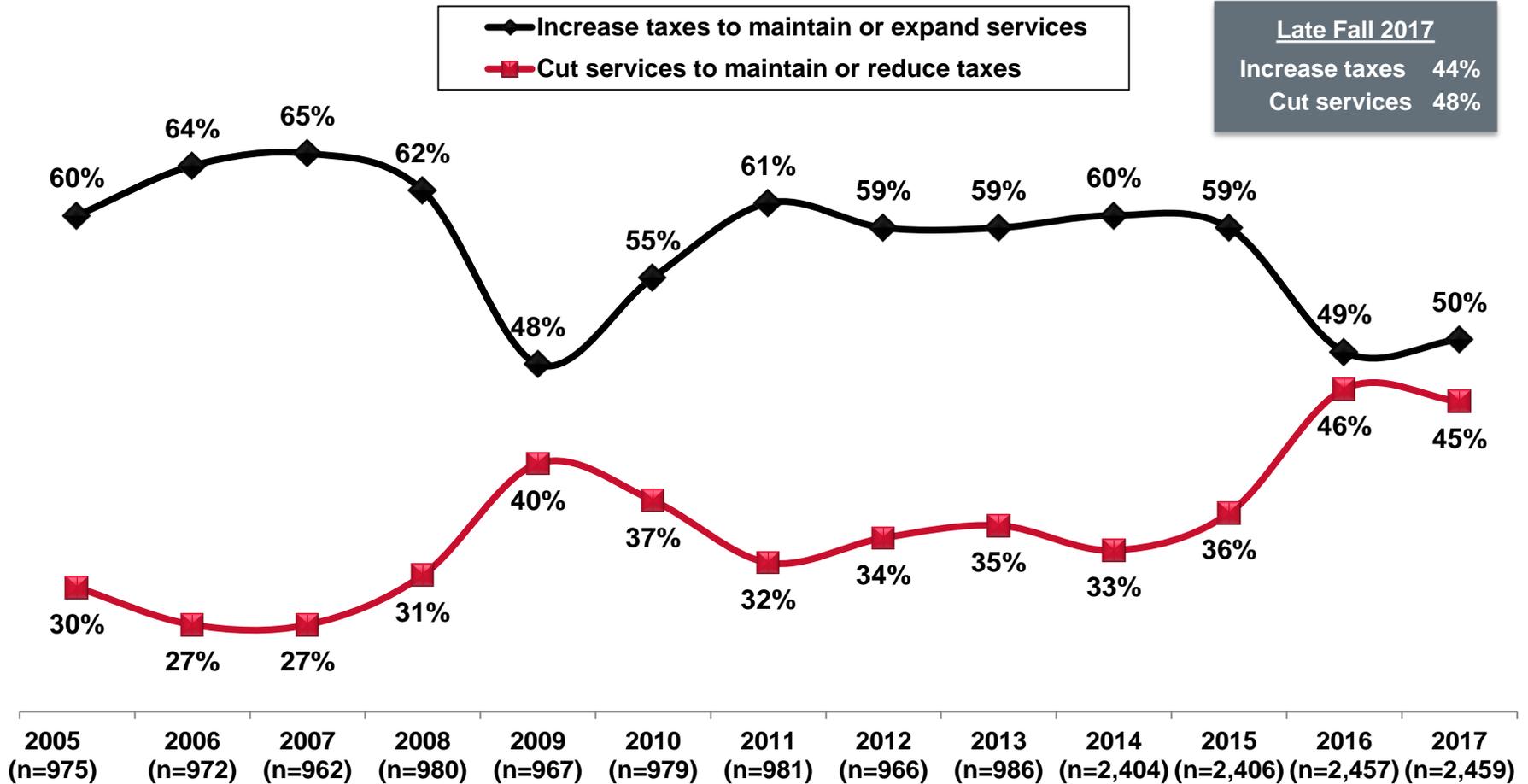


Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents



# Tracking Balancing Taxation and Service Delivery Levels: Increase Taxes versus Cut Services

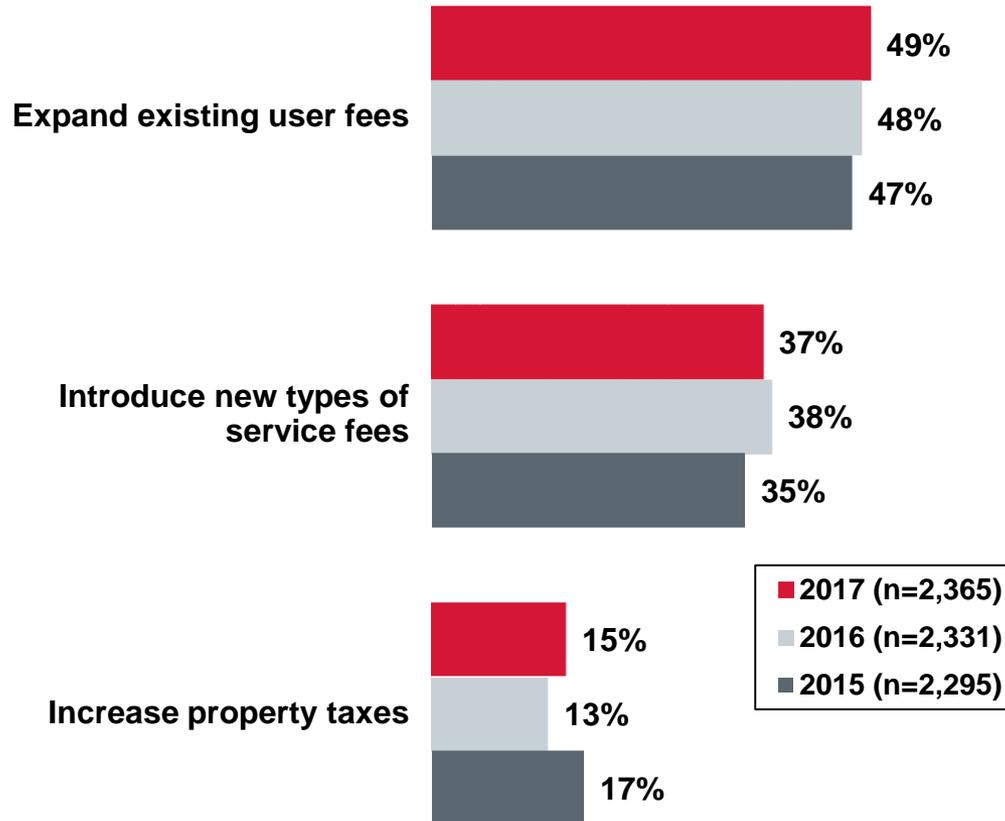


*Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents



# Options for Increasing City Revenue



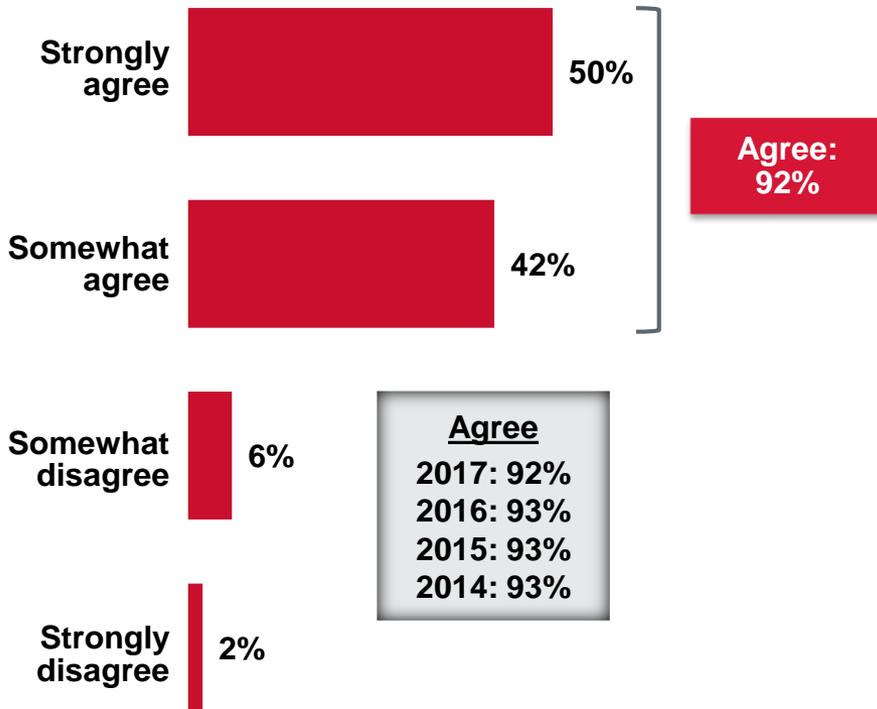
*Should The City need to increase the amount of revenue it collects from citizens for new or emerging services, would you prefer The City to ...?*

Base: Valid respondents

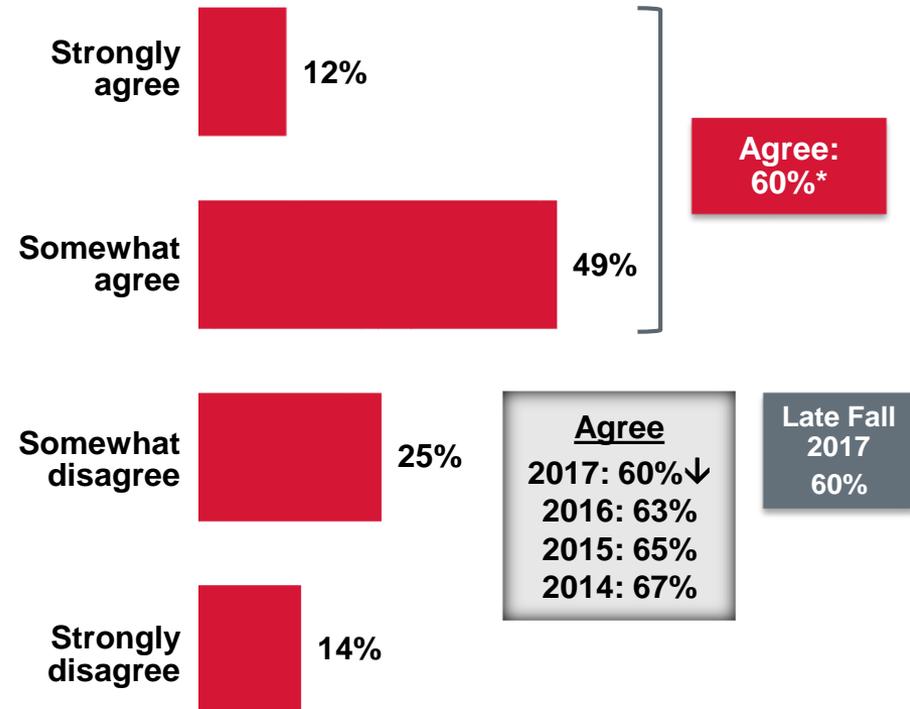


# Property Tax Dollar Investment

*I am interested in knowing how my property tax dollars are invested in various City services*



*The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services*



\*Rounding

Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.  
 Base: Valid respondents (n=2,488 / n=2,464)



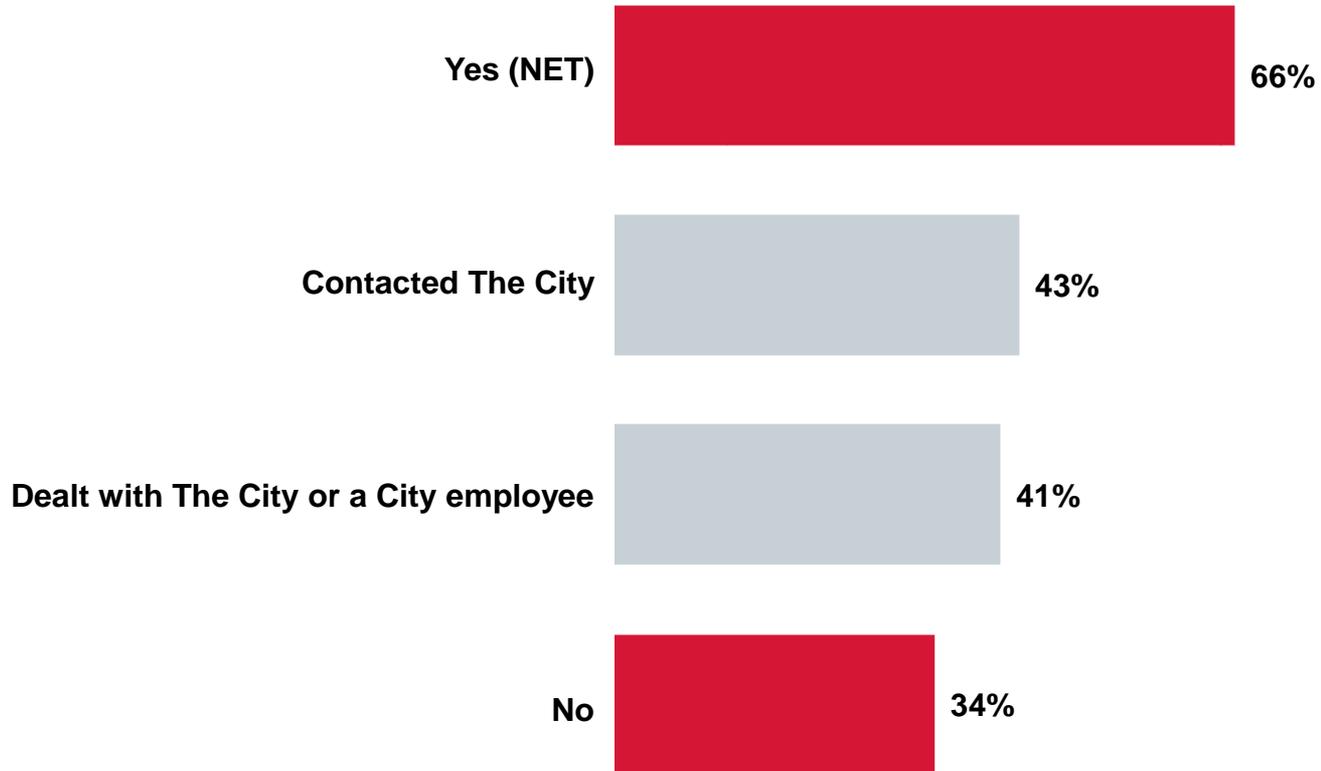
## Contact with The City





# Past 12 Months Contact with The City of Calgary

Multiple Responses

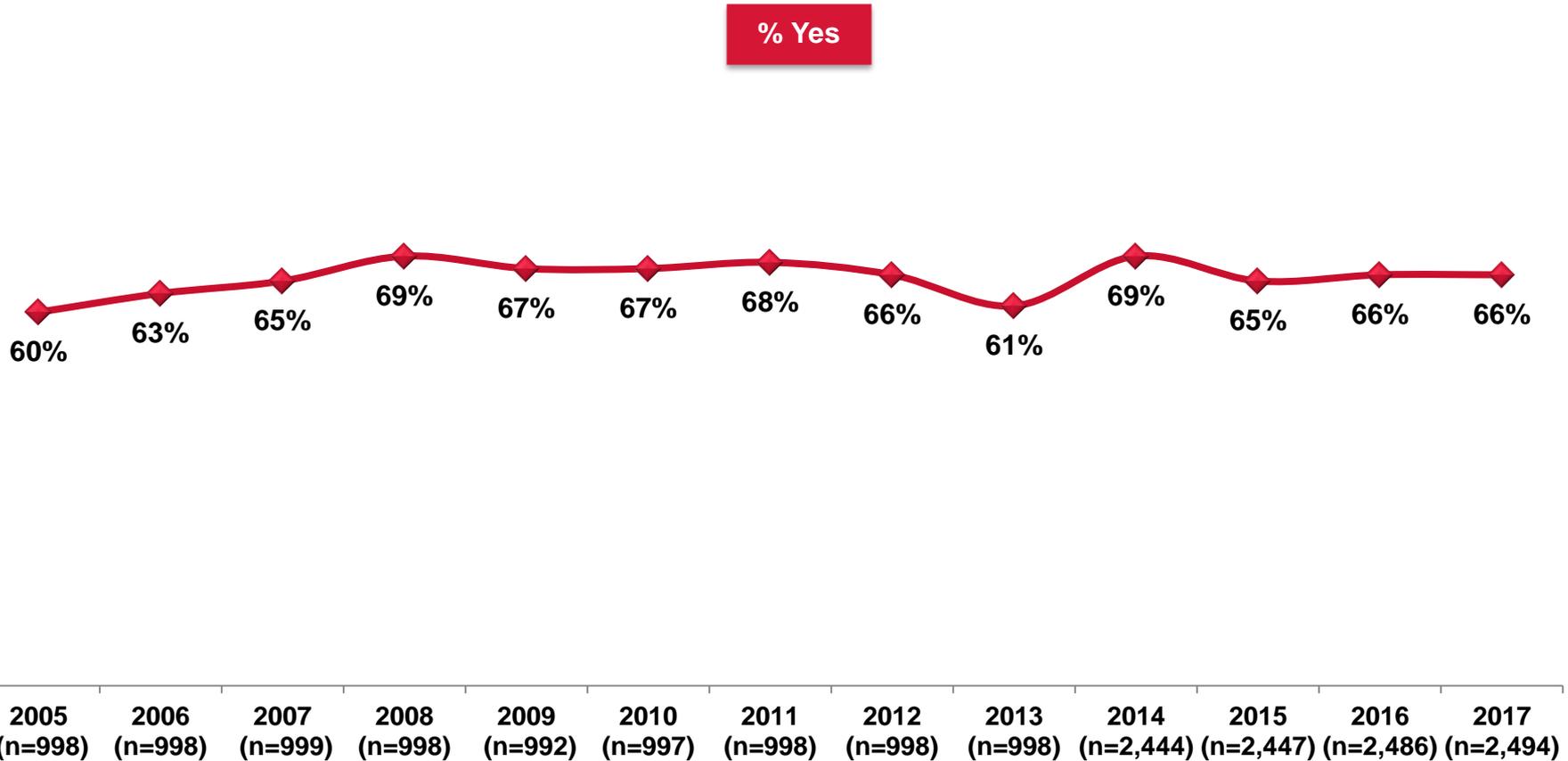


*Have you contacted The City of Calgary or dealt with The City or one of its employees in the last twelve months?*

Base: Valid respondents (n=2,494)



# Tracking Past 12 Months Contact with The City of Calgary

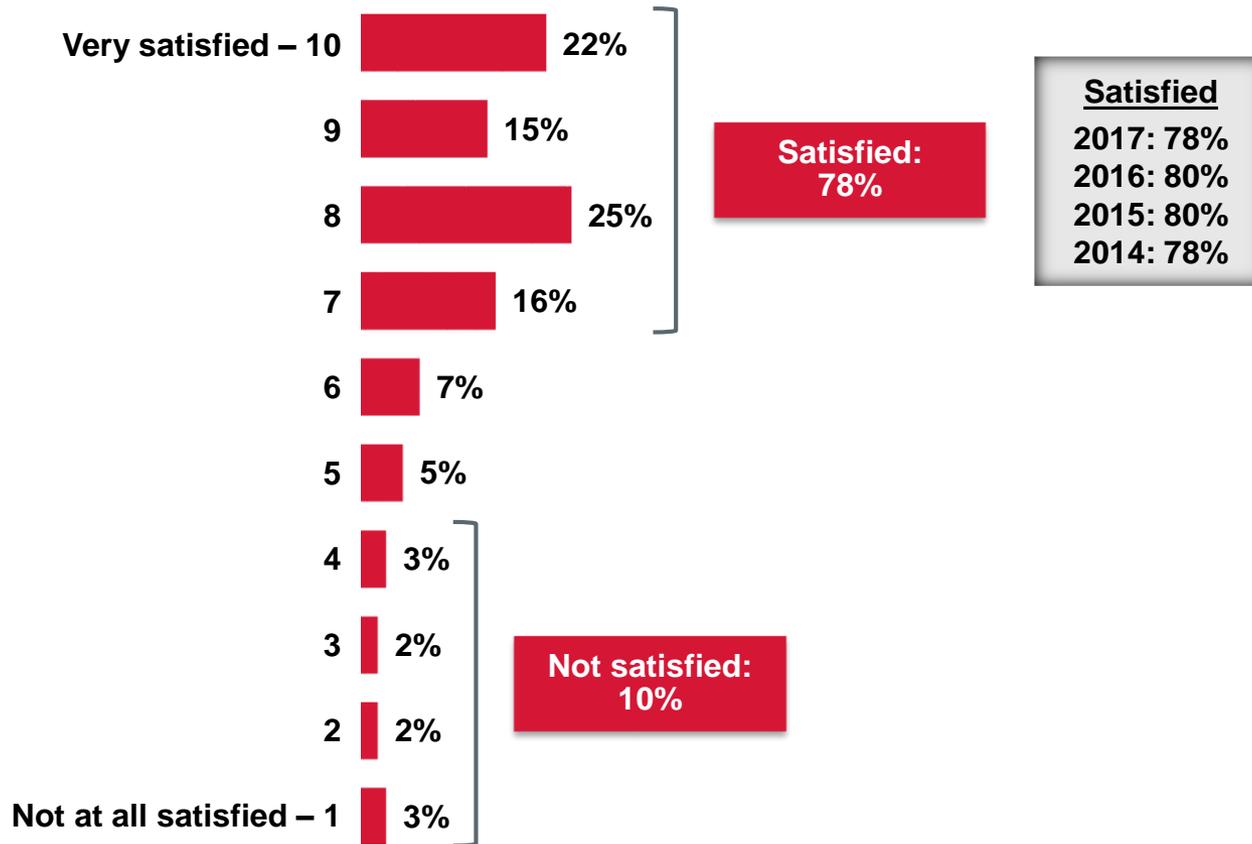


*Have you contacted The City of Calgary or one of its employees in the last twelve months?*

Base: Valid respondents



# Satisfaction with the Overall Level and Quality of Customer Service



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

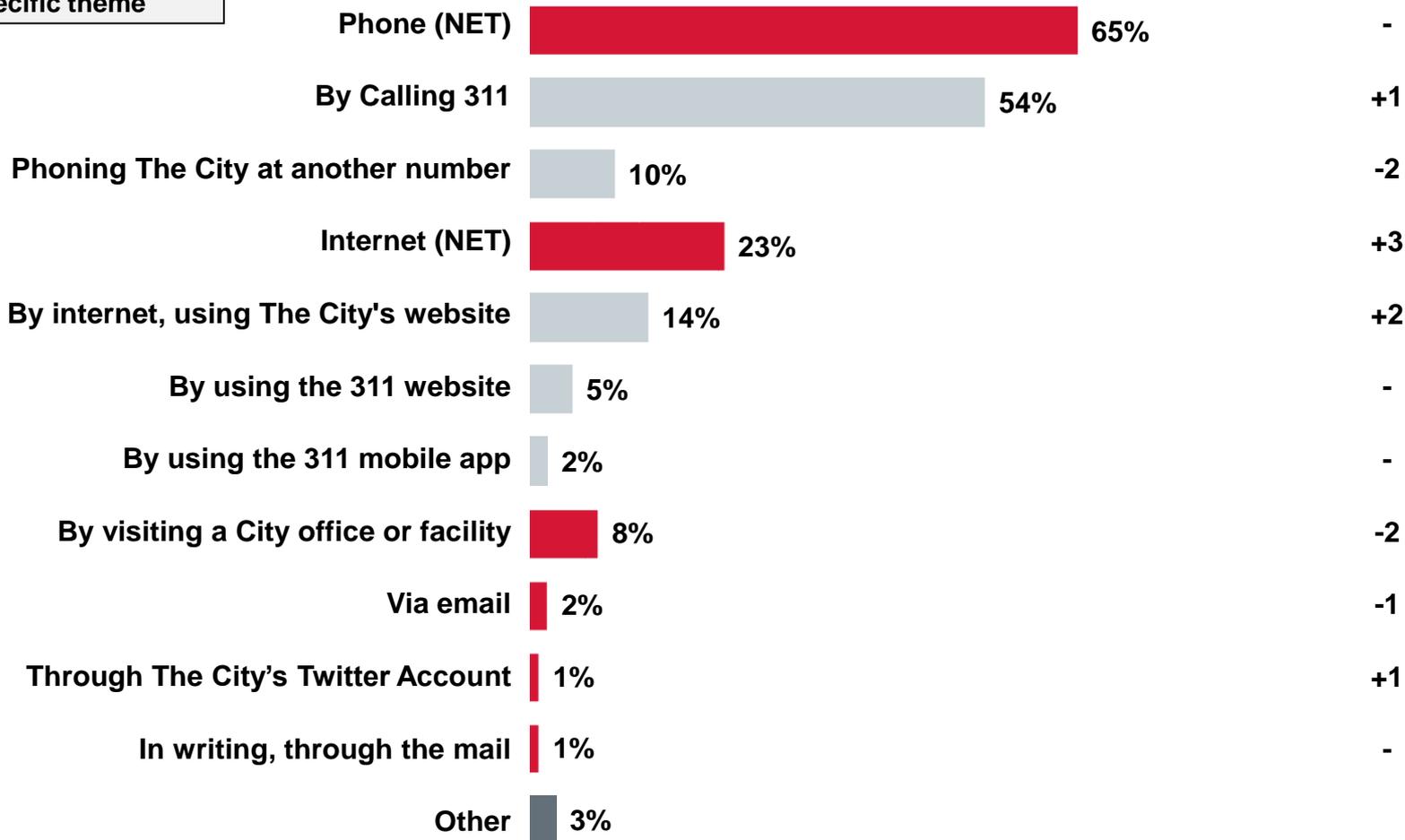
Base: Valid respondents who contacted or dealt with The City in the last twelve months (n=1,649)



# Type of Contact

Note: A "NET" is a combination of 2 or more mentions that cover a specific theme

Change  
2016 – 2017

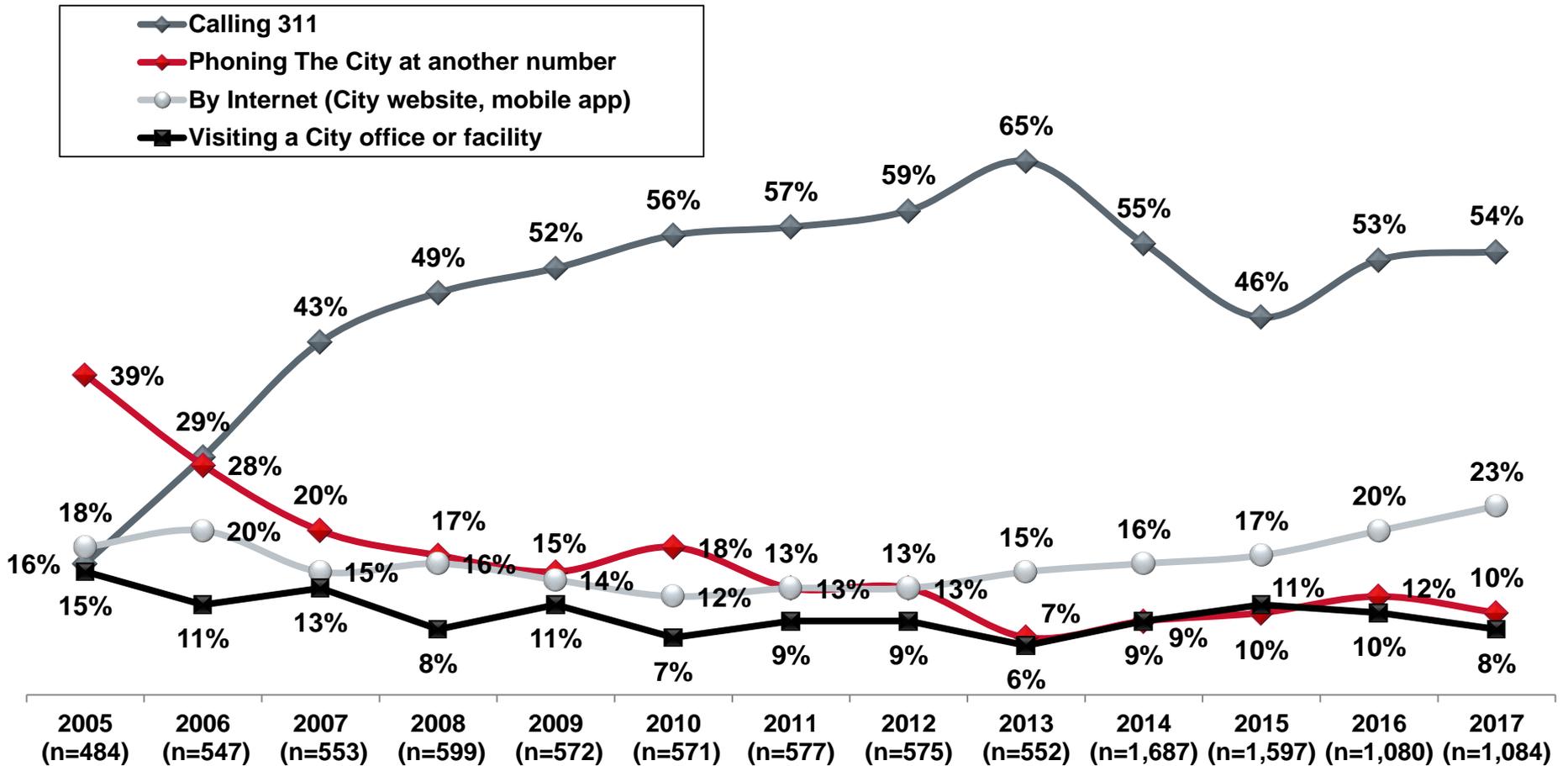


When you contacted The City was it... ?

Base: Valid respondents who contacted The City in the last twelve months (n=1,084)



# Tracking Type of Contact

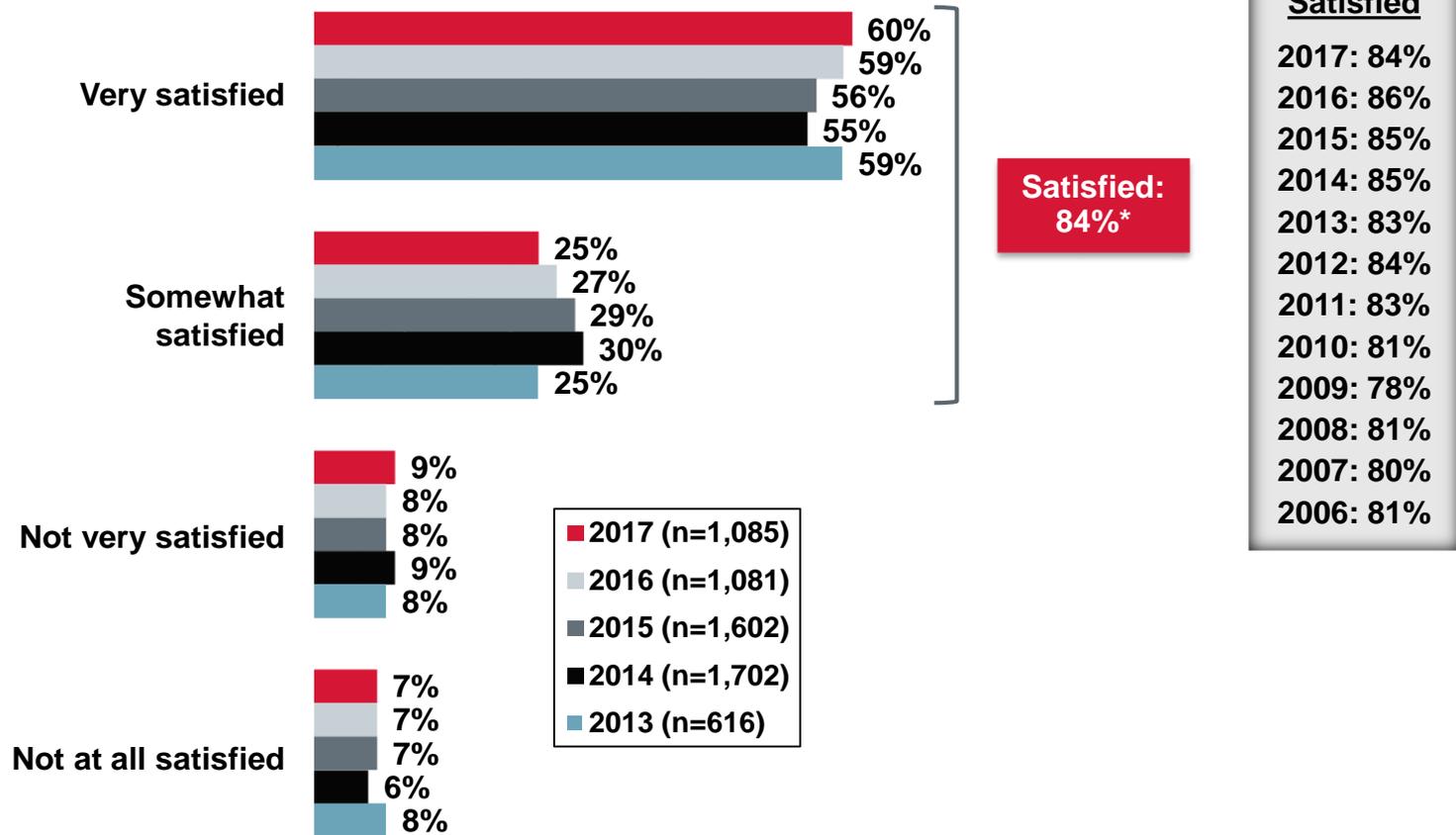


When you contacted The City was it... ?

Base: 2017 and 2016: Valid respondents who contacted The City of Calgary in the last twelve months /  
 2006 to 2015: Valid respondents who contacted or dealt with The City of Calgary in the last twelve months



# Satisfaction with Most Recent City Contact



\*Rounding

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

Base: 2017 and 2016: Valid respondents who contacted The City of Calgary in the last twelve months /  
 2006 to 2015: Valid respondents who contacted or dealt with The City of Calgary in the last twelve months



# Attitudes Regarding City Service Delivery and Transparency



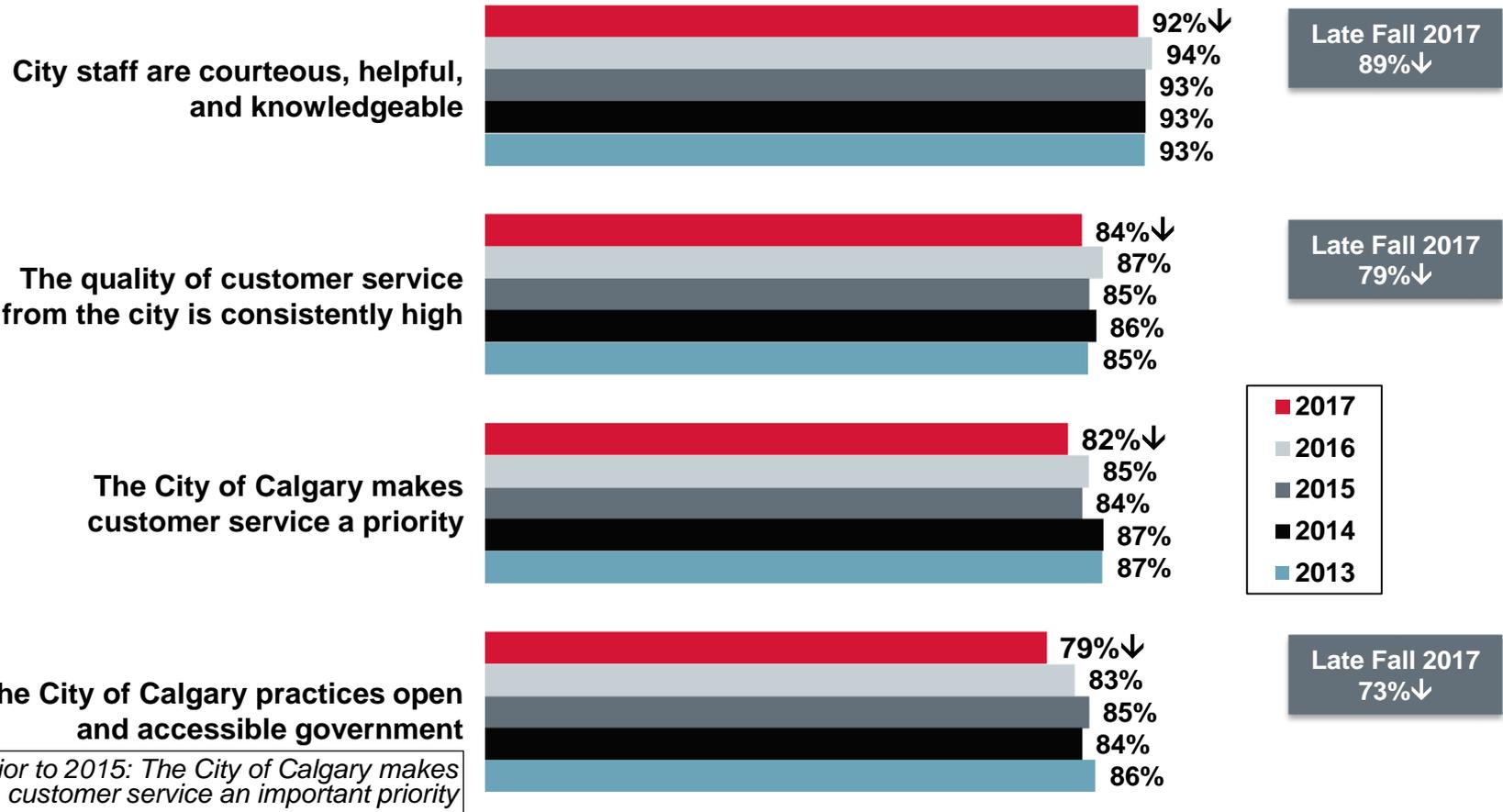
*Thinking about your personal dealings with The City of Calgary, your general impressions and anything you may have read, seen or heard, please tell me whether you agree or disagree with each of the following statements about The City?*

Base: Valid respondents (Bases vary)



# Tracking Attitudes Regarding City Service Delivery and Transparency

% Agree

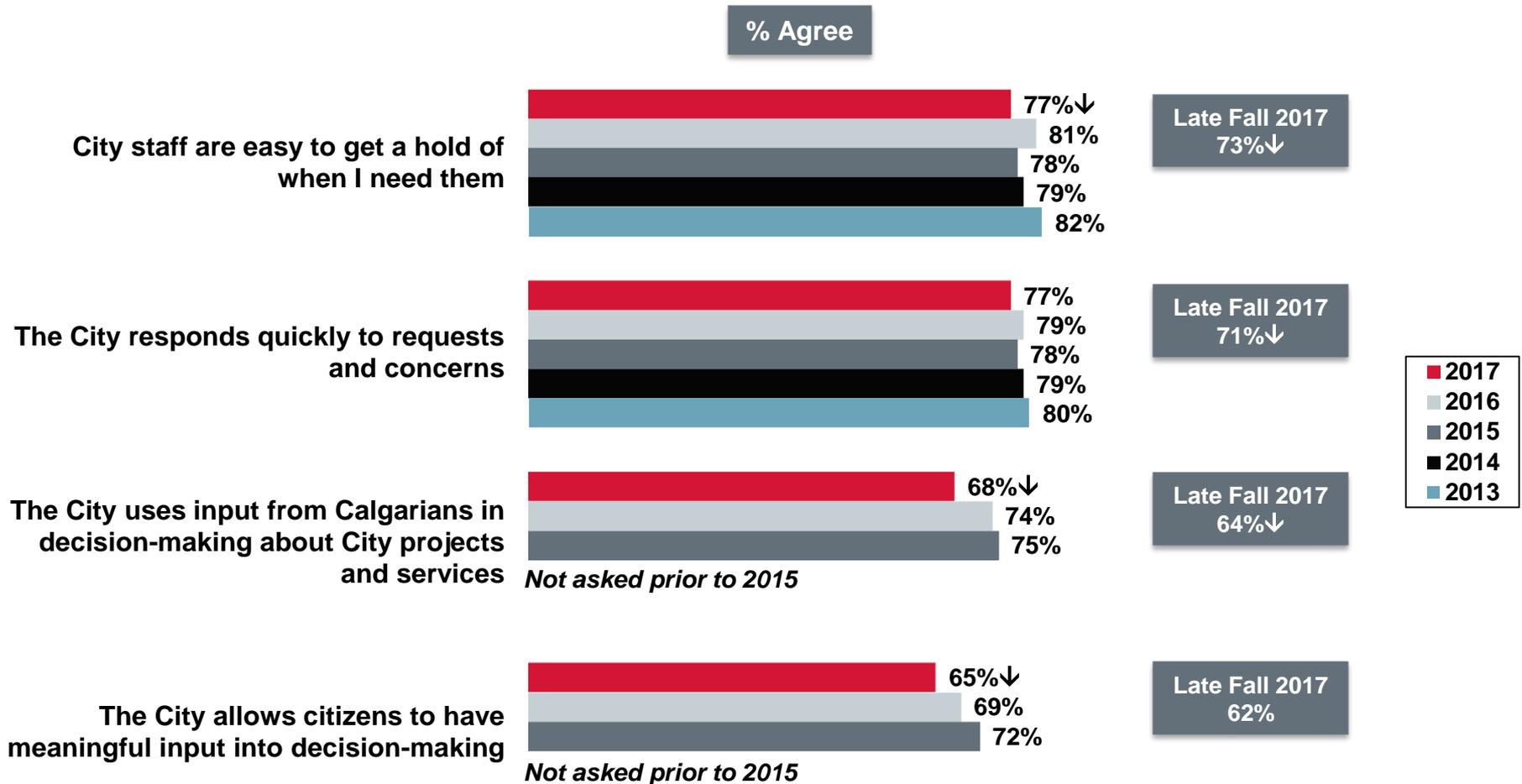


Thinking about your personal dealings with The City of Calgary, your general impressions and anything you may have read, seen or heard, please tell me whether you agree or disagree with each of the following statements about The City?

Base: Valid respondents (Bases vary)



# Tracking Attitudes Regarding City Service Delivery and Transparency (continued)



*Thinking about your personal dealings with The City of Calgary, your general impressions and anything you may have read, seen or heard, please tell me whether you agree or disagree with each of the following statements about The City?*

Base: Valid respondents (Bases vary)

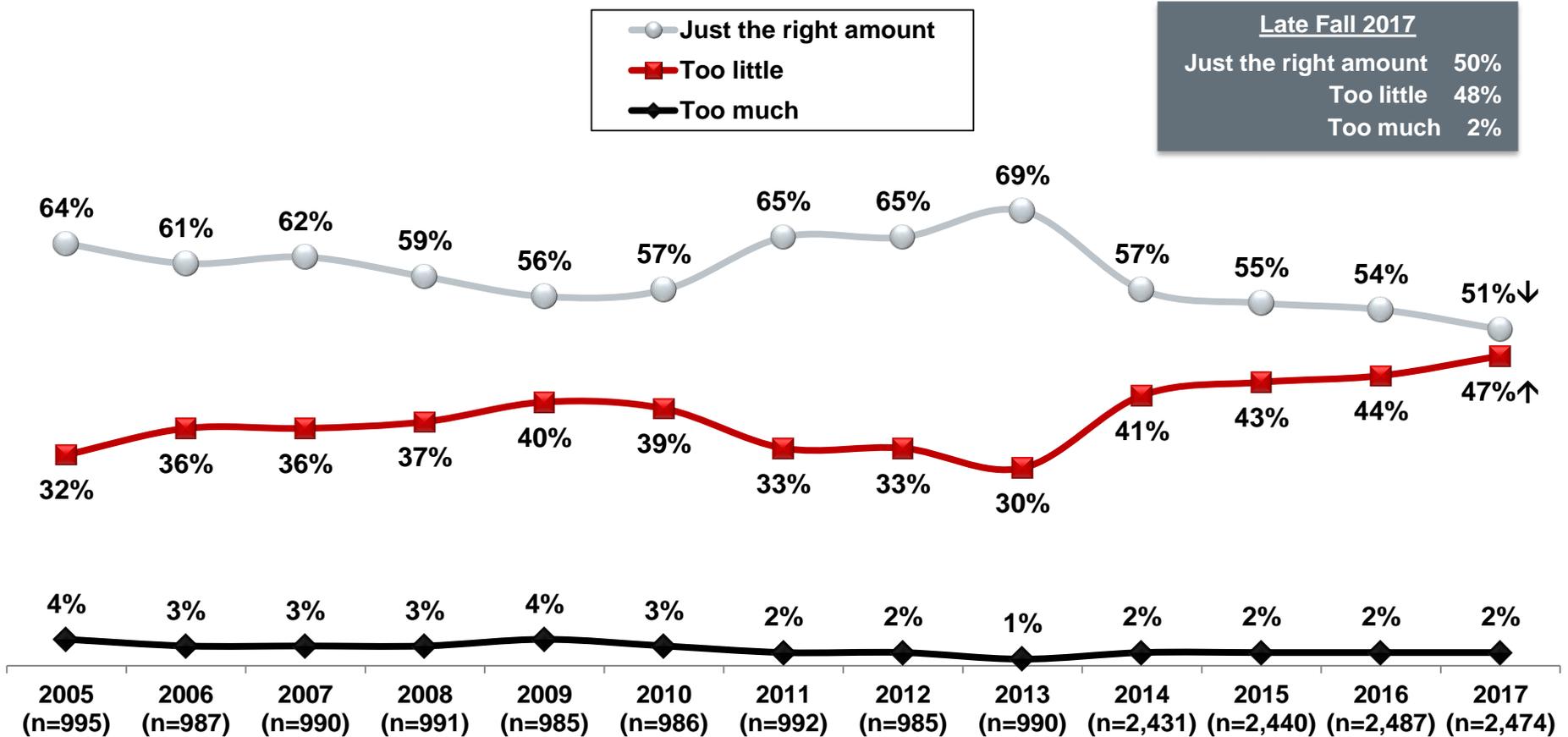


## City Communications





# The Amount of Information Received



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

Base: Valid respondents



# Top Areas for Information from The City

Change  
2016 – 2017

Multiple  
Responses

|  |     |     |
|--|-----|-----|
| <b>Budget &amp; Spending (Net)</b>               | 36% | +4↑ |
| Taxes/ government spending                       | 33% | +5↑ |
| <b>Infrastructure, Traffic &amp; Roads (Net)</b> | 32% | +6↑ |
| Roads  | 13% | +4↑ |
| Construction                                     | 6%  | +4↑ |
| Infrastructure (unspecified)                     | 5%  | -   |
| <b>Planning &amp; Development (Net)</b>          | 16% | -3↓ |
| Planning/ future growth                          | 9%  | -2  |
| Land use planning/ development                   | 4%  | -2↓ |
| <b>Taxation (Net)</b>                            | 16% | -2  |
| Taxes/ taxation (unspecified)                    | 10% | -   |
| Property taxes                                   | 5%  | -   |
| <b>Transit (Net)</b>                             | 15% | +1  |
| Transit  | 7%  | +1  |
| Transportation (unspecified)                     | 7%  | -   |
| <b>Government (Net)</b>                          | 12% | +6↑ |
| <b>Recreation (Net)</b>                          | 9%  | -1  |
| Recreation/ leisure centres/ programs            | 7%  | +1  |
| <b>Community &amp; Social Services (Net)</b>     | 9%  | +3↑ |
| <b>City Services (Net)</b>                       | 8%  | -   |
| <b>Crime, Safety &amp; Policing (Net)</b>        | 8%  | +1  |
| <b>Media (Net)</b>                               | 6%  | +1  |
| <b>Environment &amp; Waste Management (Net)</b>  | 5%  | +2↑ |
| City/ public art displays                        | 5%  | +5↑ |

Note: A "NET" is a combination of 2 or more mentions that cover a specific theme

Total mentions <3% are not shown

What are the top three areas where you would like The City to provide more information?

Base: Valid respondents who say they receive too little or just the right amount of information from The City (n=2,172)

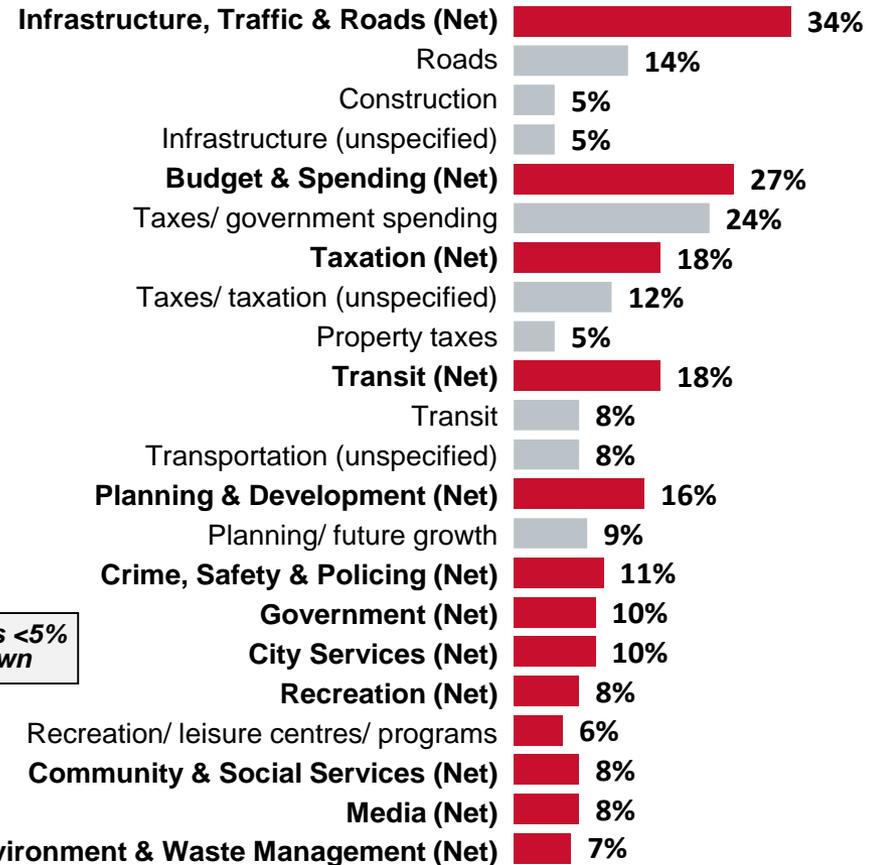
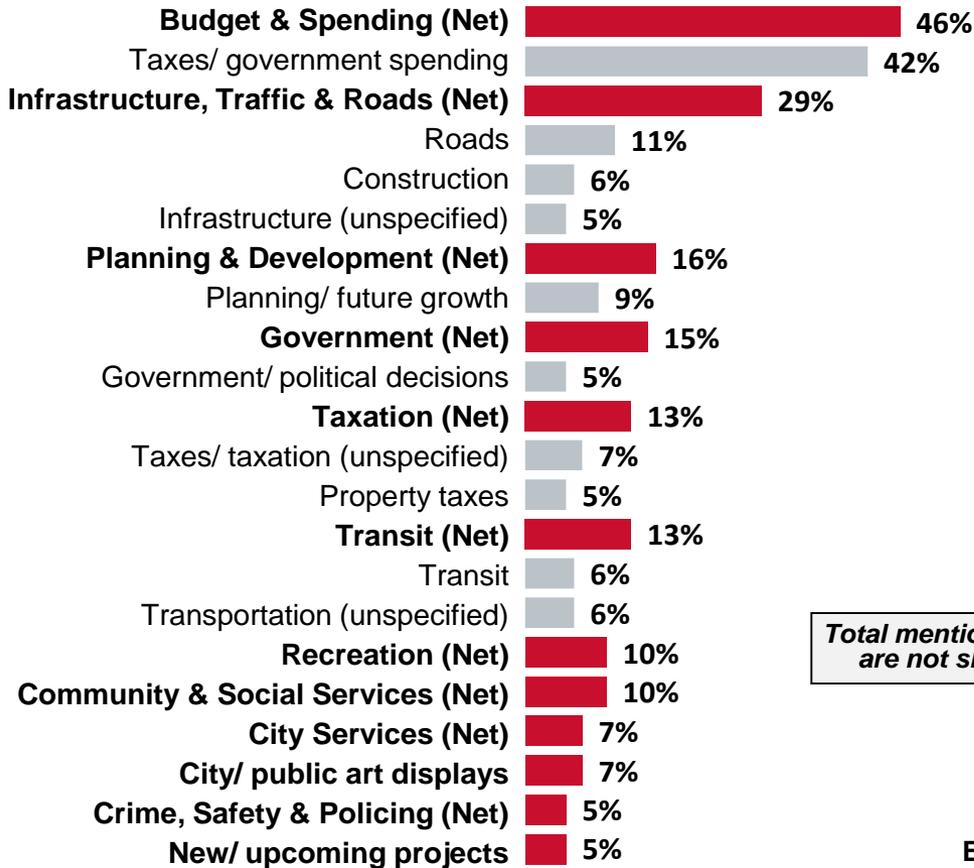


# Top Areas for Information from The City: By Amount of Information Received

## Receive Too Little Information

## Multiple Responses

## Receive Just the Right Amount of Information



Total mentions <5% are not shown

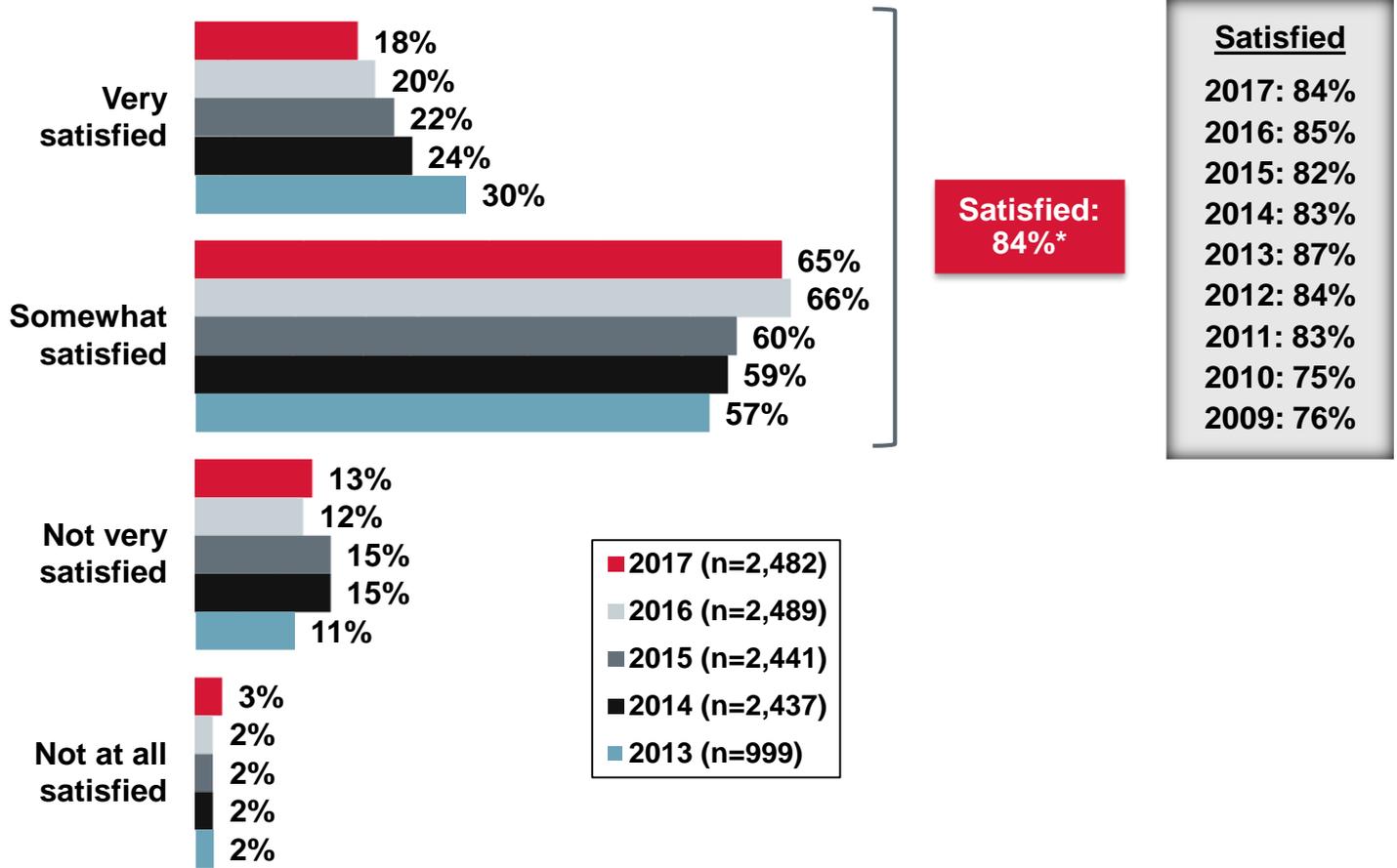
Note: A "NET" is a combination of 2 or more mentions that cover a specific theme

What are the top three areas where you would like The City to provide more information? Base: Valid respondents who say they receive too little information (n=1,059)

What are the top three areas where The City should provide information? Base: Valid respondents who say they receive just the right amount of information (n=1,113)



# Satisfaction with the Overall Quality of City Information and Communications



\*Rounding

And how satisfied are you with the overall quality of City information and communications?

Base: Valid respondents



## City Trust and Reputation

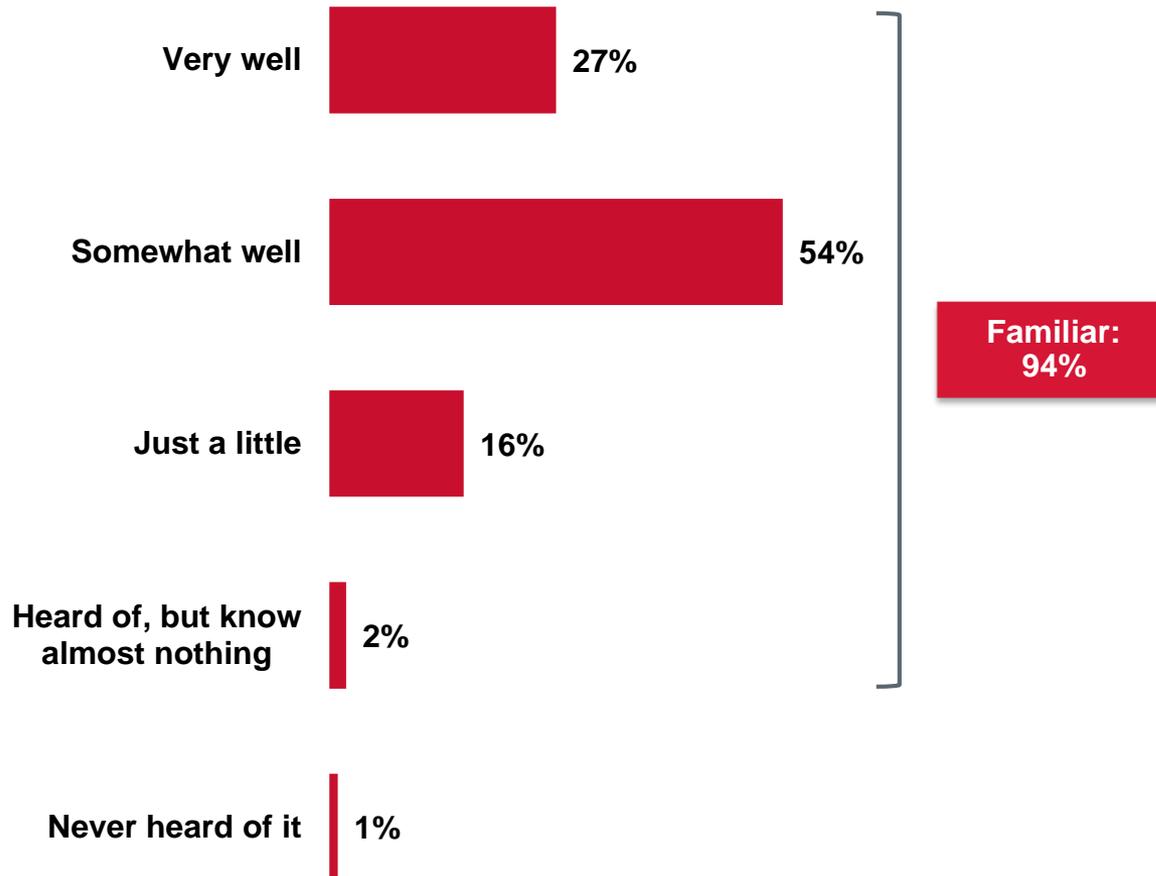




## A Model of Reputation



**Building a strong reputation helps an organization perform more effectively in the present AND builds a reservoir of goodwill to draw upon in future crises**

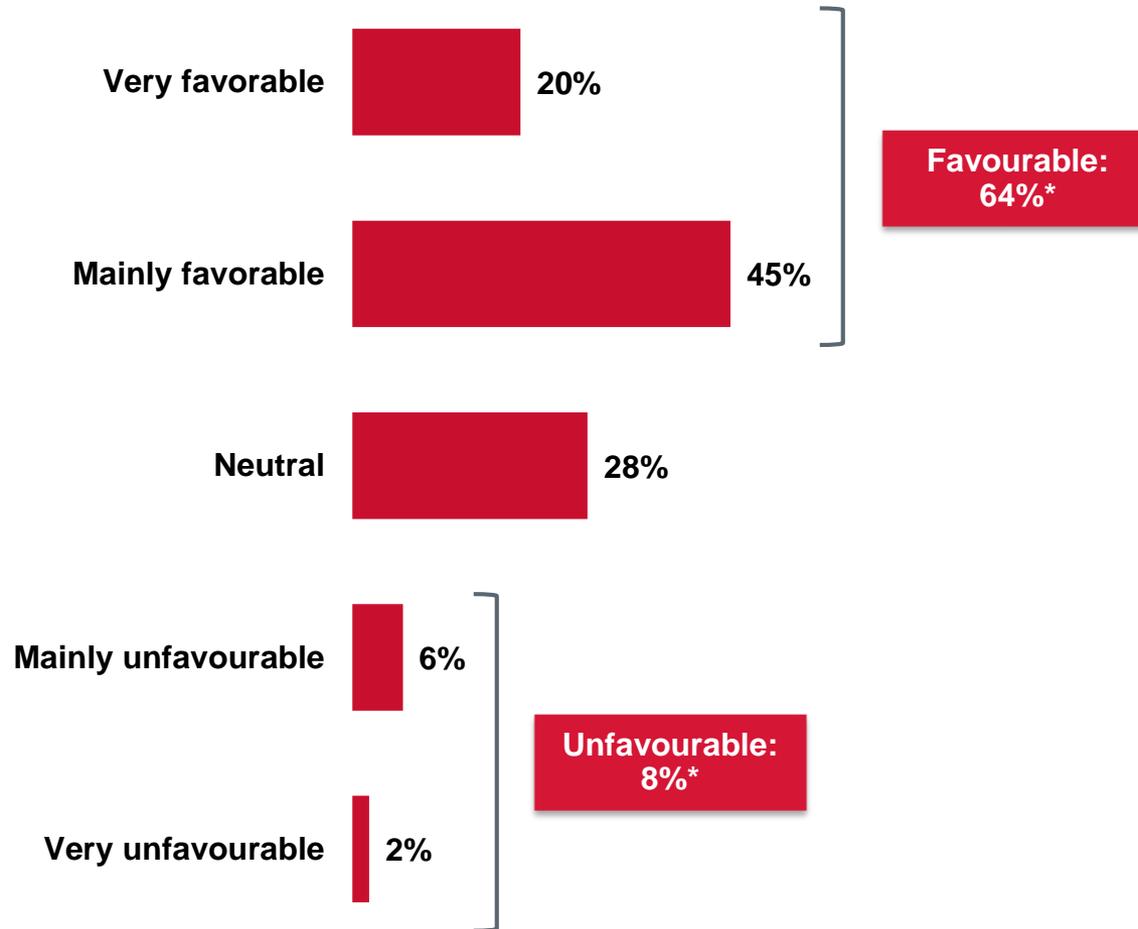


*Taking into account all the ways you have learned about or had contact with THE CITY OF CALGARY, how well do you feel you know THE CITY?*

Base: Valid respondents (n=1,500)



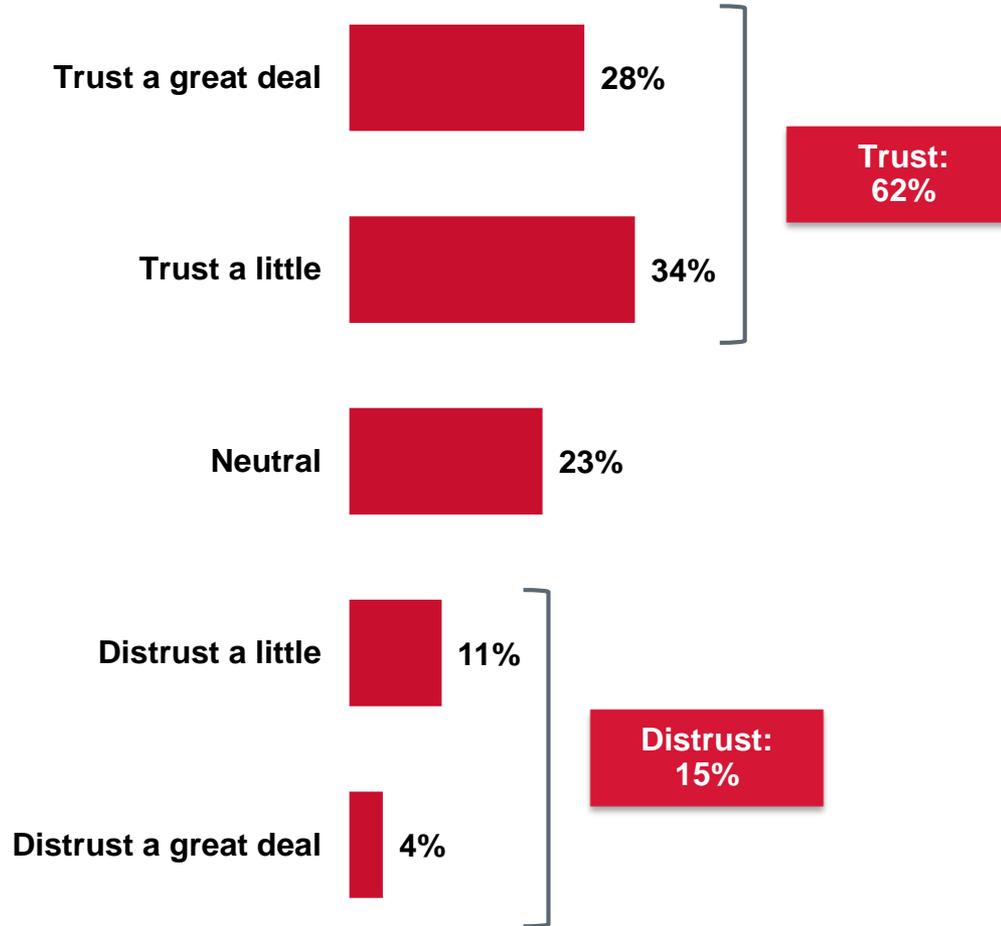
# Favourability



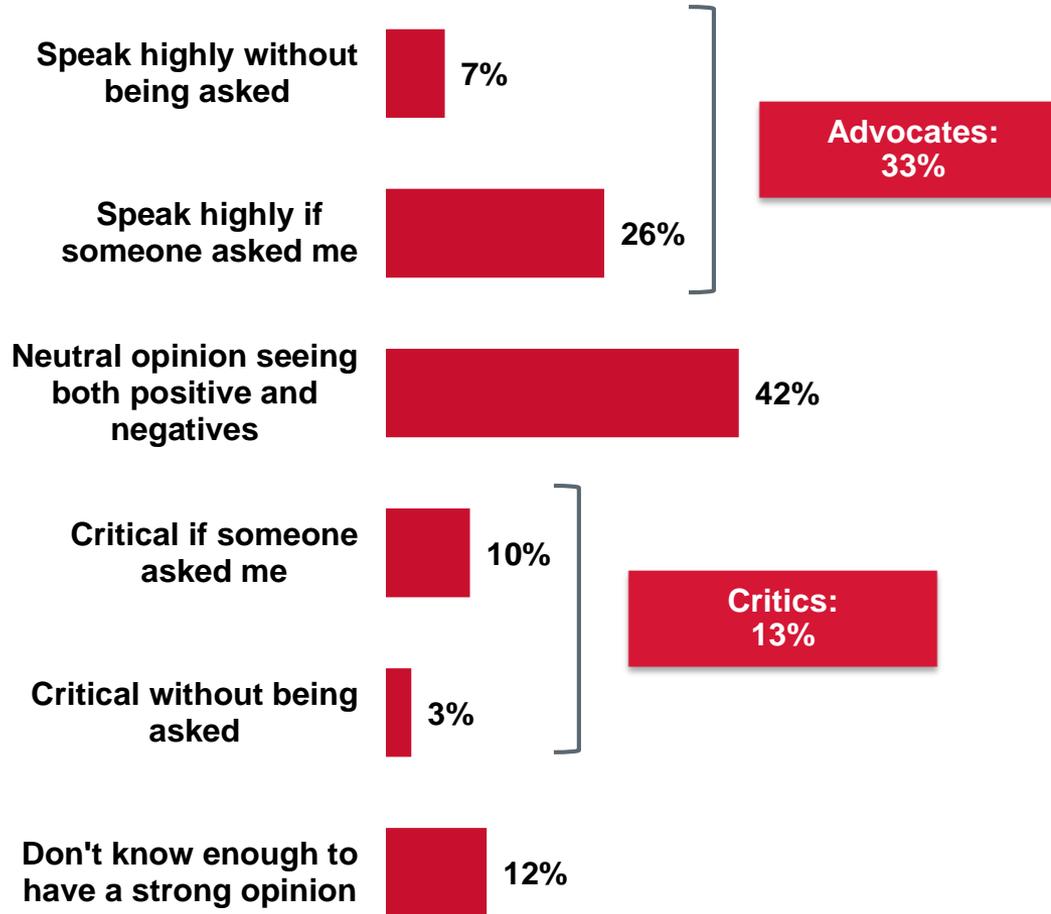
\*Rounding

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

Base: Valid respondents (n=1,500)

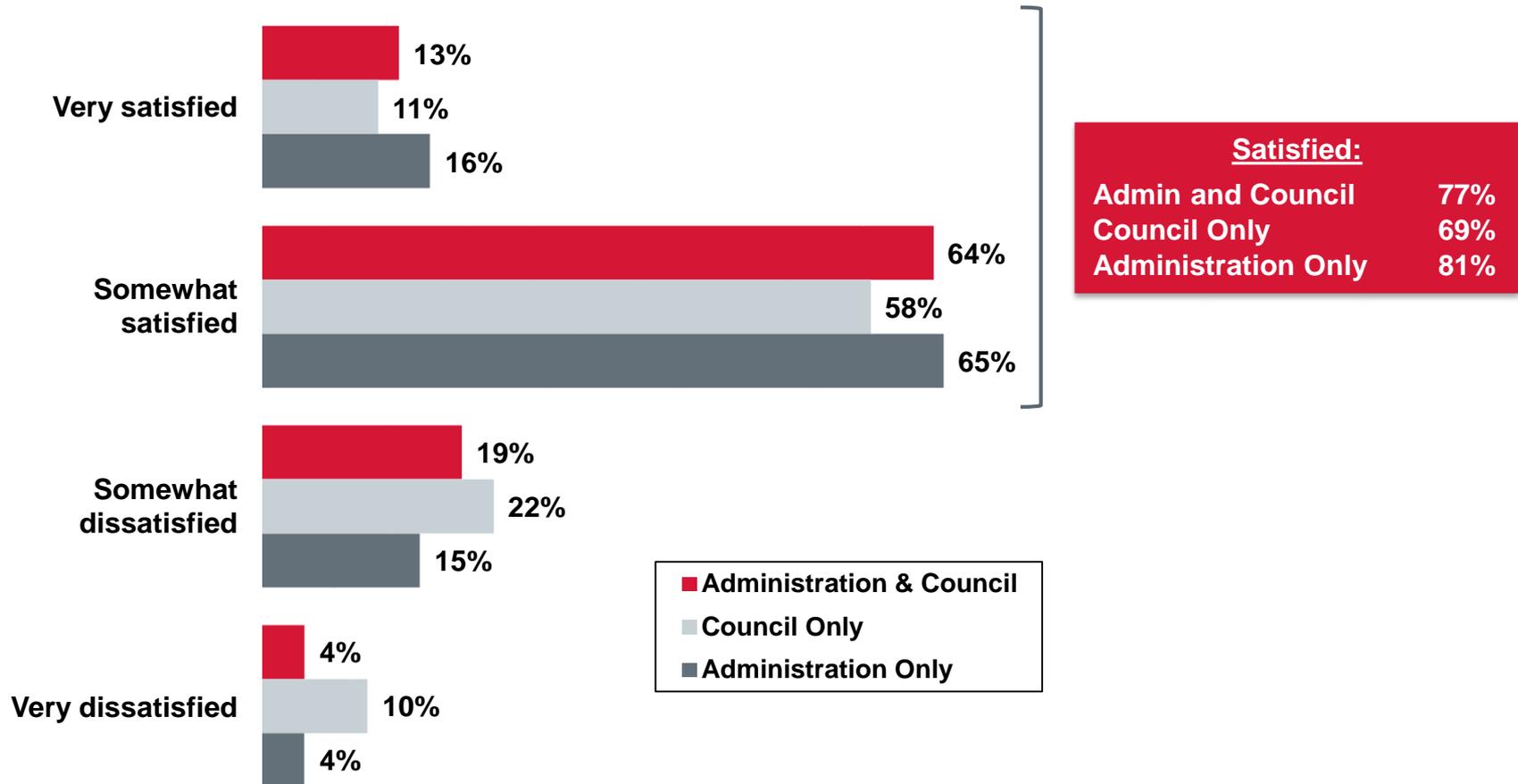


*Again, taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?*  
 Base: Valid respondents (n=1,500)



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

Base: Valid respondents (n=1,500)



*Taking everything into account, how satisfied or dissatisfied are you with the way The City of Calgary -including Council and City Administration as a whole - is going about running our City? Are you ...?*

Base: Valid respondents



## Demographics





# Demographics

## Gender

| Male   | 49% |
|--------|-----|
| Female | 51% |

## Education

| Completed high school or less                      | 18% |
|--|-----|
| Some post secondary or completed a college diploma | 35% |
| Completed university degree or post-grad degree    | 47% |

## Age

| 18 to 24    | 13% |
|-------------|-----|
| 25 to 34    | 20% |
| 35 to 44    | 17% |
| 45 to 54    | 20% |
| 55 to 64    | 14% |
| 65 or older | 16% |
| <i>Mean</i> | 45  |

## Income

| Less than \$30,000      | 7%  |
|-------------------------|-----|
| \$30,000 to <\$45,000   | 9%  |
| \$45,000 to <\$60,000   | 11% |
| \$60,000 to <\$75,000   | 8%  |
| \$75,000 to <\$90,000   | 9%  |
| \$90,000 to <\$105,000  | 10% |
| \$105,000 to <\$120,000 | 10% |
| \$120,000 to <\$150,000 | 14% |
| \$150,000 or more       | 23% |

Base: Valid respondents (Bases vary)



## Tenure in Calgary

| Less than 5 years        | 7%  |
|--------------------------|-----|
| 5 to less than 10 years  | 9%  |
| 10 to less than 15 years | 11% |
| 15 to less than 20 years | 12% |
| 20 to less than 30 years | 24% |
| 30 to less than 40 years | 16% |
| 40 or more               | 21% |
| <i>Mean</i>              | 26  |

## Type of Home

| Single-detached house                    | 71% |
|--|-----|
| Apartment or apartment-style condominium | 13% |
| Duplex, triplex or fourplex              | 8%  |
| Townhouse or rowhouse                    | 7%  |
| Another type of multi-dwelling unit      | 1%  |

## Own or Rent

| Own     | 76% |
|---------|-----|
| Rent    | 21% |
| Neither | 2%  |

## Responsible for Property Taxes

| Yes | 84% |
|-----|-----|
| No  | 16% |

## Household Size

| 1           | 13% |
|-------------|-----|
| 2           | 31% |
| 3           | 19% |
| 4           | 22% |
| 5 or more   | 15% |
| <i>Mean</i> | 3.0 |

## Children and Seniors in Household

| Yes - Children | 36% |
|----------------|-----|
| Yes - Seniors  | 17% |

Base: Valid respondents (Bases vary)



# Respondent Characteristics

## Born in Canada

| Yes | 74% |
|-----|-----|
| No  | 26% |

## Age Left Country of Birth

Base: Not born in Canada (n=647)

|                     |     |
|---------------------|-----|
| Under the age of 12 | 28% |
| 12 to 17            | 13% |
| 18 or older         | 59% |

## Ethnic Background

|                                      |     |
|--------------------------------------|-----|
| Caucasian/ White                     | 24% |
| British                              | 20% |
| Canadian/ French Canadian            | 17% |
| Western European                     | 12% |
| Southern or Eastern European         | 9%  |
| East or Southeast Asian              | 9%  |
| South Asian                          | 6%  |
| Central/ South American or Caribbean | 2%  |
| West Asian or Middle Eastern         | 2%  |
| African                              | 2%  |
| Aboriginal/ First Nations/ Metis     | 2%  |

## Disability

|     |     |
|-----|-----|
| Yes | 16% |
| No  | 84% |

## Visible Minority

|     |     |
|-----|-----|
| Yes | 23% |
| No  | 77% |

Base: Valid respondents (Bases vary)

## Contact

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