

# 2019 Citizen Satisfaction Research and Insights

Presentation

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## Contact

Krista Ring  
Manager: Web, Research, and Projects  
The City of Calgary  
403-268-9963 | 403-988-9425  
[Krista.Ring@calgary.ca](mailto:Krista.Ring@calgary.ca)



# New Approach

Research Program

## Quantitative

Citizen Satisfaction

Economic Perspectives

Citizen Perspectives

Business Perspectives



Budget Conversations

## Qualitative

Focus Groups

In Person Engagement

Online Engagement

Social Media Scan

Citizen Insights



# Methodology - Research

## Fall 2019 Citizen Satisfaction Telephone Survey

- ❖ Telephone survey conducted in partnership with Ipsos with a randomly selected sample of 2,502 Calgarians aged 18 years and older between August 19<sup>th</sup> and September 16<sup>th</sup>, 2019.
  - Both landline (60%) and cell phone (40%) sample were used.
  - The average interview length was 32 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 2,502 is  $\pm 2.0$  percentage points, 19 times out of 20.
- ❖ Where possible, results are compared to previous iterations of the Citizen Satisfaction survey.
  - One should note that the 2006 to 2016 iterations of the survey were conducted annually in the Fall. Starting in 2017, the survey has been conducted bi-annually, with a Spring and a Fall wave.
  - Given the time of year each survey is run – and possible seasonal differences – caution should be exercised with comparing results from the 2019 Fall Citizen Satisfaction survey to 2019 Spring Pulse survey results.
  - Statistically significant changes from Fall 2018 to Fall 2019 and from Spring 2019 to Fall 2019 are noted.

## 2019 Spring Pulse Telephone Survey

- ❖ Telephone survey conducted in partnership with Ipsos with a randomly selected sample of 2,500 Calgarians aged 18 years and older between May 13<sup>th</sup> and June 12<sup>th</sup>, 2019.
  - Both landline (60%) and cell phone (40%) sample were used.
  - The average interview length was 31 minutes.

## Economic Perspectives Telephone Survey

- ❖ Telephone survey conducted in partnership with Leger with a randomly selected sample of n=500 Calgarians 18 years of age and older between May 24 and June 20, 2019.
  - Both landline (60%) and cell phone (40%) sample were used.
  - Average length of the interview was 10 minutes.
- ❖ Data were weighted by age, gender and quadrant based on the latest Civic Census.
- ❖ The margin of error for the study is  $\pm 4.4\%$ , 19 times out of 20.

## Business Perspectives Panel Survey

- ❖ Online panel survey conducted in partnership with PRA sent to 769 business panelists on June 24, 2019, and closed on July 4, 2019.
- ❖ Overall, 203 panelists completed the survey (26% response rate).
- ❖ Respondents included a representative mix by business size, years in operation, and location.

## Citizen Perspectives Survey

- ❖ Telephone survey conducted in partnership with Leger with a randomly selected sample of n=500 Calgarians 18 years of age and older. The 2018 Wave 5 survey ran December 6-15, 2018 and the 2019 Wave 3 survey ran June 7-16, 2019.
  - Both landline and cell phone sample were used.
  - Average length of the interview for 2018 Wave 5 was 16 minutes.
  - Average length of the interview for 2019 Wave 3 was 19 minutes.
- ❖ Data were weighted by age, gender based on the latest Civic Census.
- ❖ The margin of error for the study is  $\pm 4.4\%$ , 19 times out of 20.

## Methodology – Budget Conversations

### Fall 2019 Citizen Satisfaction Focus Groups

- ❖ A total of ten two-hour (2 hour) focus groups were held with Calgary residents between September 30, 2019 and October 8, 2019.
- ❖ Focus groups were held in professional focus group facilities with a trained and professional moderator.
- ❖ In close collaboration with The City's Corporate Research Team, Ipsos designed a recruitment screening questionnaire to ensure a good mix of gender, age, education, income and attitudes towards The City.
- ❖ Groups were screened and randomly recruited by geographical area of residence: 2 groups for each of the city's quadrants as well as 2 groups for downtown residents.
- ❖ Ipsos also worked with The City to develop a moderator's guide of discussion areas and themes, which included a number of exercises for focus group participants to undertake during the sessions.
- ❖ The group discussions focused on the participants' perspectives on: how City services impact their quality of life; how they measure service value; which City services should have more or less investment; and what should Council consider when making budget decisions.
- ❖ In total, 90 citizens participated in the focus group sessions, amounting to 20 hours of in-depth discussion with residents over five days.

### In Person Engagement

- ❖ 14 pop-ups were organized citywide to ensure one in each Ward
- ❖ Pop-ups locations consisted of venues that had existing foot traffic and would reach Calgarians whose personal circumstances vary.
- ❖ Pop-ups are intended to be spontaneous and meet people 'where they are at'. They are one technique to reach people who would not otherwise seek the project out.
- ❖ Marketing of the pop-ups consisted of advance notice on the Engage webpage, a memo to Council, an employee communications article,
- ❖ We had 459 interactions with Calgarians. Some people stopped for a conversation and provided their input at the pop-ups, while others asked questions, took information and committed to participating online.

### Online Engagement

- ❖ The engagement questions online mirrored those asked at the pop-ups to ensure consistency and transparency.
- ❖ Online engagement was offered as an option for those with an interest in sharing their perspectives and for those unable to attend a pop-up. Online engagement was offered over eight days.
- ❖ During the time that the feedback form was open, there were about 3200 visitors to the page.
- ❖ Online engagement was marketed internally and externally using paid and un-paid social media, a memo to Council, and an employee communications article.

### Social Media Scan

- ❖ The City of Calgary Corporate social media accounts used social media monitoring for an 8 week period (September - October) to track any comments or messages related to budget.
- ❖ 96 social media messages were tracked related to this topic.
- ❖ 34 of these messages were responded to by our Channel Management team to correct misinformation or answer questions



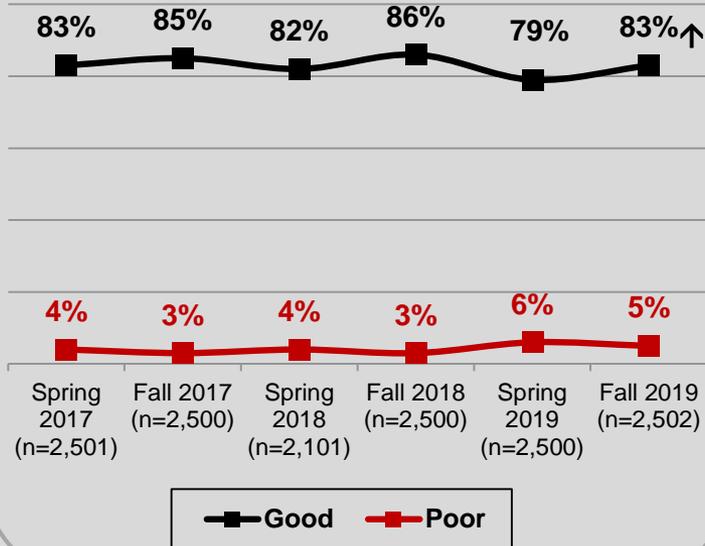
## Quality of Life





## 83%↑

Rate their quality of life as "good."



In the past three years:

## 44%

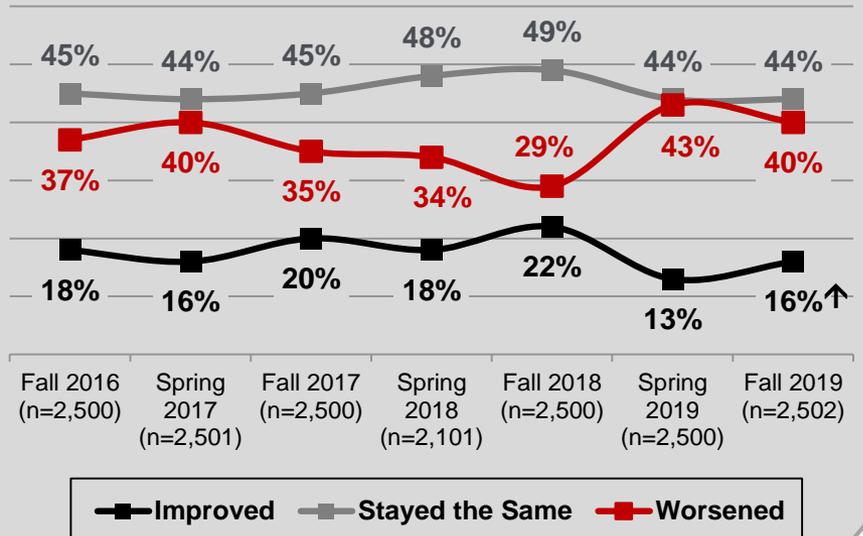
Believe their quality of life has **stayed the same**

## 40%

Believe their quality of life has **worsened**

## 16%↑

Believe their quality of life has **improved**





# 2019 Quality of Life Snapshot

**79%** ↑

*“Calgary is a great place to make a life.”*

**63%** ↑

*“Calgary is a great place to make a living.”*

**31%**

Agree *“I am regularly involved in neighbourhood and local community events.”*

**85%**

Agree *“I am proud to live in my neighbourhood.”*

**87%**

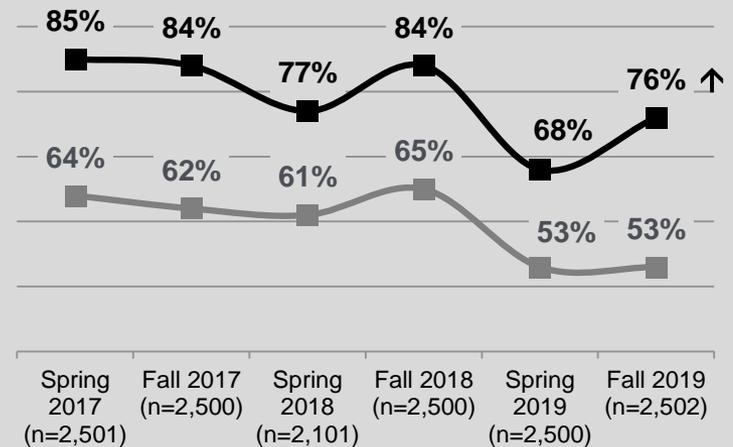
Agree *“I am proud to be a Calgarian”*

**76%** ↑

*“Calgary is on the right track to being a better city 10 years from now.”*

**53%**

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



■ Calgary is moving in the right direction to ensure a high quality of life for future generations  
■ Calgary is on the right track to being a better city 10 years from now.



**95%**

*Feel safe walking alone in their neighbourhood during the day.*

**84%**

*Feel safe walking alone in their neighbourhood after dark.*

**89%**

*Agree “My neighbourhood is safe for all residents and visitors, regardless of ethnicity, race, religion or sexual identity.”*

**85%**

*Agree “My neighbours care about my personal safety.”*

**85%**

*Agree “There is sufficient street lighting in my neighbourhood.”*

**30%**

*Agree “Vandalism, graffiti and other deliberate damage to property or vehicles is a problem in my neighbourhood.”*

## Top Safety Concern About Neighbourhoods:

**Traffic concerns / speeding**

**23%**

**82%**

*Children in my neighbourhood demonstrate safe practices when crossing streets on foot.*

**79%**

*There are enough marked crosswalks in my neighbourhood for pedestrians to safely cross the streets.*

**61%**

*Drivers tend to obey the 30 km per hour speed limit in playground and school zones in my neighbourhood.*

**61%**

*Drivers tend to obey the regular speed limit in my neighbourhood.*



**95%**

*'Good' Rating of the Overall State of Calgary's Environment*

**86%**

Satisfaction with the job The City is doing to protect the environment

**83%**

Satisfaction with The City's programs and services aimed at helping Calgarians reduce their environmental impact

**58%**

Concerned about the impact that extreme weather events are having, or might have, on their life

**40%**

Believe The City should be leading citizens in taking action to help reduce the potential impacts of extreme weather events



**81%**

*Agree The City delivers programs and services that “remove barriers to opportunities, access, and inclusion for Calgarians.”*

**88%**

*Agree The City “supports and grows a variety of cultures, including customs, language, traditions, and art.”*

**75%**

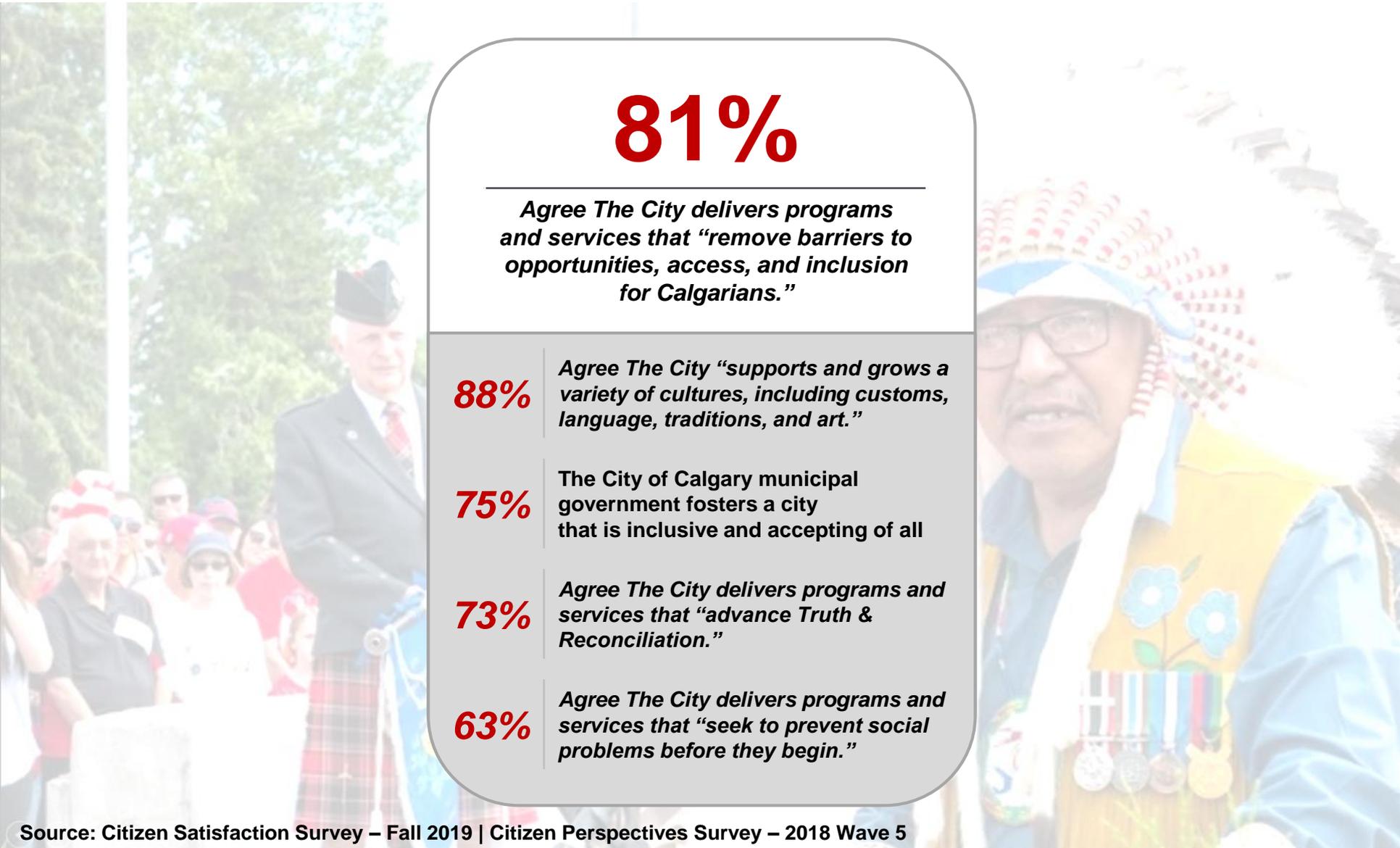
*The City of Calgary municipal government fosters a city that is inclusive and accepting of all*

**73%**

*Agree The City delivers programs and services that “advance Truth & Reconciliation.”*

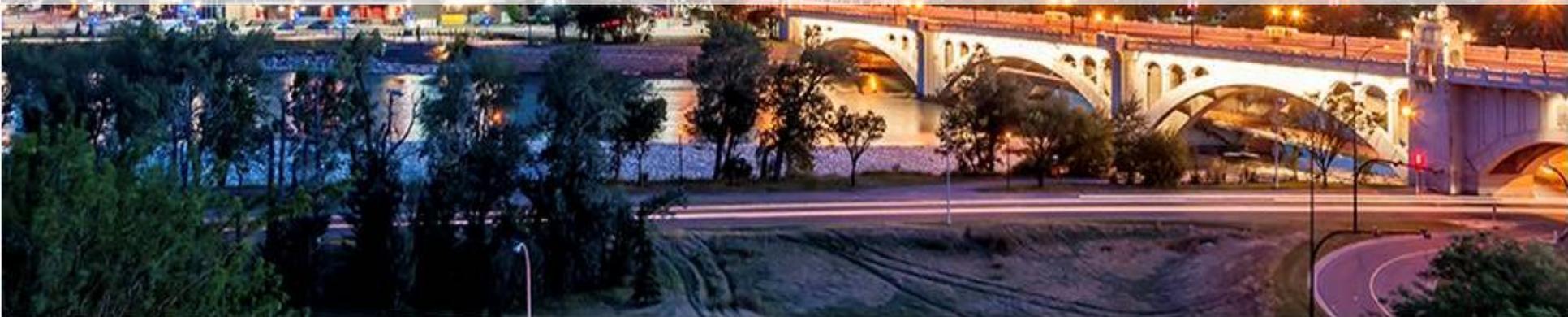
**63%**

*Agree The City delivers programs and services that “seek to prevent social problems before they begin.”*





## Budget Conversations





# Issue Agenda

## Multiple Responses

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

	■ First Mention	■ Other Mentions	% Change Fall 2018 – Fall 2019	
<b>Infrastructure, Traffic &amp; Roads [NET]</b>	<b>24%</b>	<b>11%</b>	35%	-5↓
Traffic congestion	5%	7%		-2↓
Road conditions	4%	7%		+1
Infrastructure maintenance	5%	6%		+1
(Lack of) snow removal	3%	5%		-3↓
Roads (unspecified)	4%	5%		-3↓
Too much/poorly planned/delayed road construction	3%	5%		+1
<b>Transit [NET]</b>	<b>12%</b>	<b>5%</b>	17%	+1
Public Transportation (incl. buses/ C-train/ poor service)	6%	8%		+1
Transportation (unspecified)	4%	6%		-3↓
Transit system improvements	4%	6%		+6↑
<b>Crime, Safety &amp; Policing [NET]</b>	<b>10%</b>	<b>5%</b>	15%	+1
Breaking and entering/gangs/drugs	6%	9%		+2
Public safety	4%	6%		+1
<b>Budget &amp; Spending [NET]</b>	<b>8%</b>		11%	+7↑
<b>Taxes [NET]</b>	<b>8%</b>		11%	+3↑
<b>Economy [NET]</b>	<b>6%</b>		8%	+3↑
<b>Education [NET]</b>	<b>5%</b>		8%	+1
<b>Recreation [NET]</b>	<b>4%</b>		7%	-2
<b>Environment and Waste Management [NET]</b>	<b>4%</b>		7%	-
<b>Growth and Planning [NET]</b>		5%		+1
<b>Homelessness, Poverty &amp; Affordable Housing [NET]</b>		4%		-1
<b>Healthcare [NET]</b>		4%		+2↑
<b>None</b>			11%	

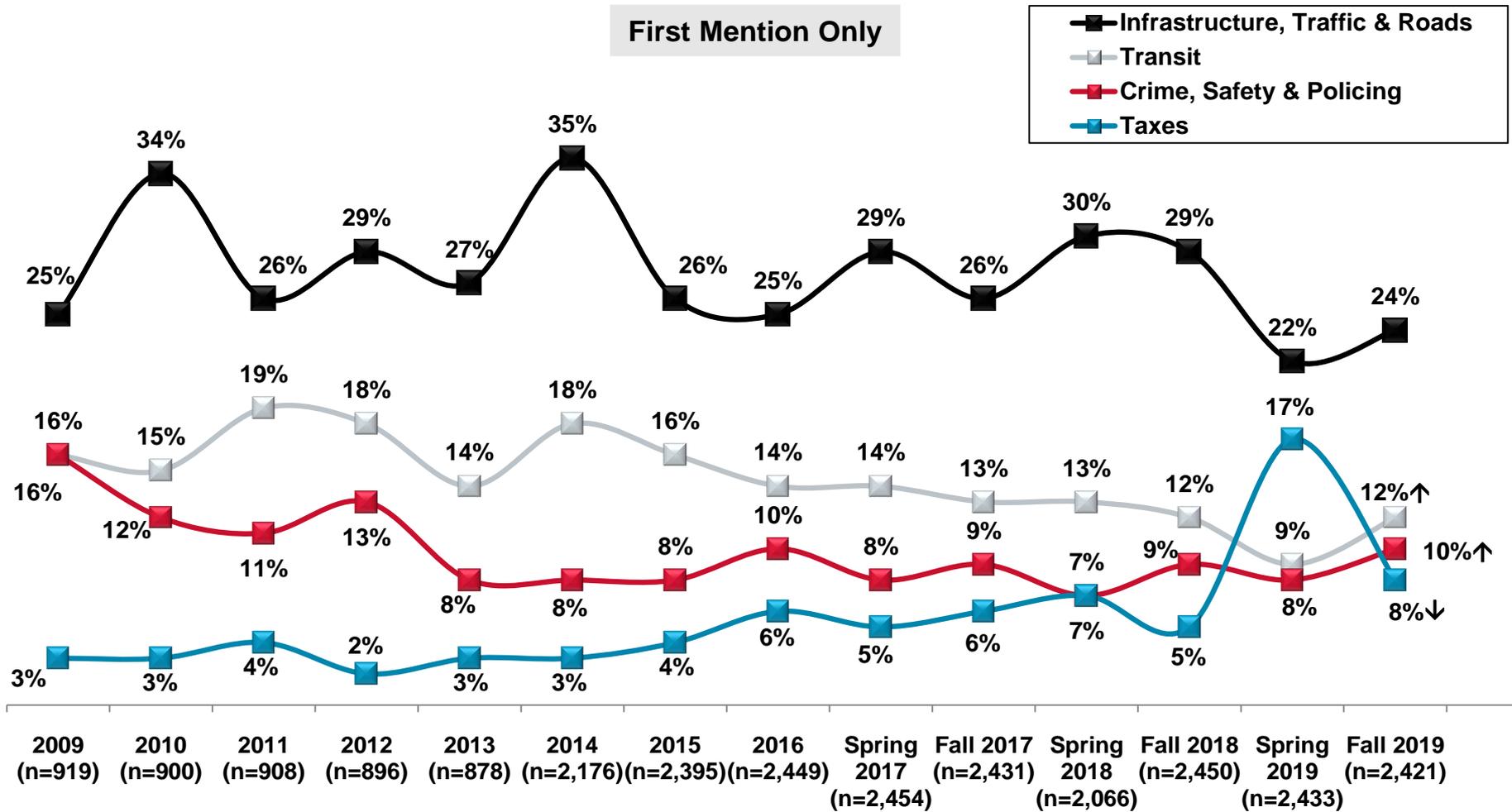
NET mentions of <4% are not shown

↑ Statistically higher than Fall 2018  
↓ Statistically lower than Fall 2018

*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=2,422)



# Tracking Most Important Issue Facing Calgary



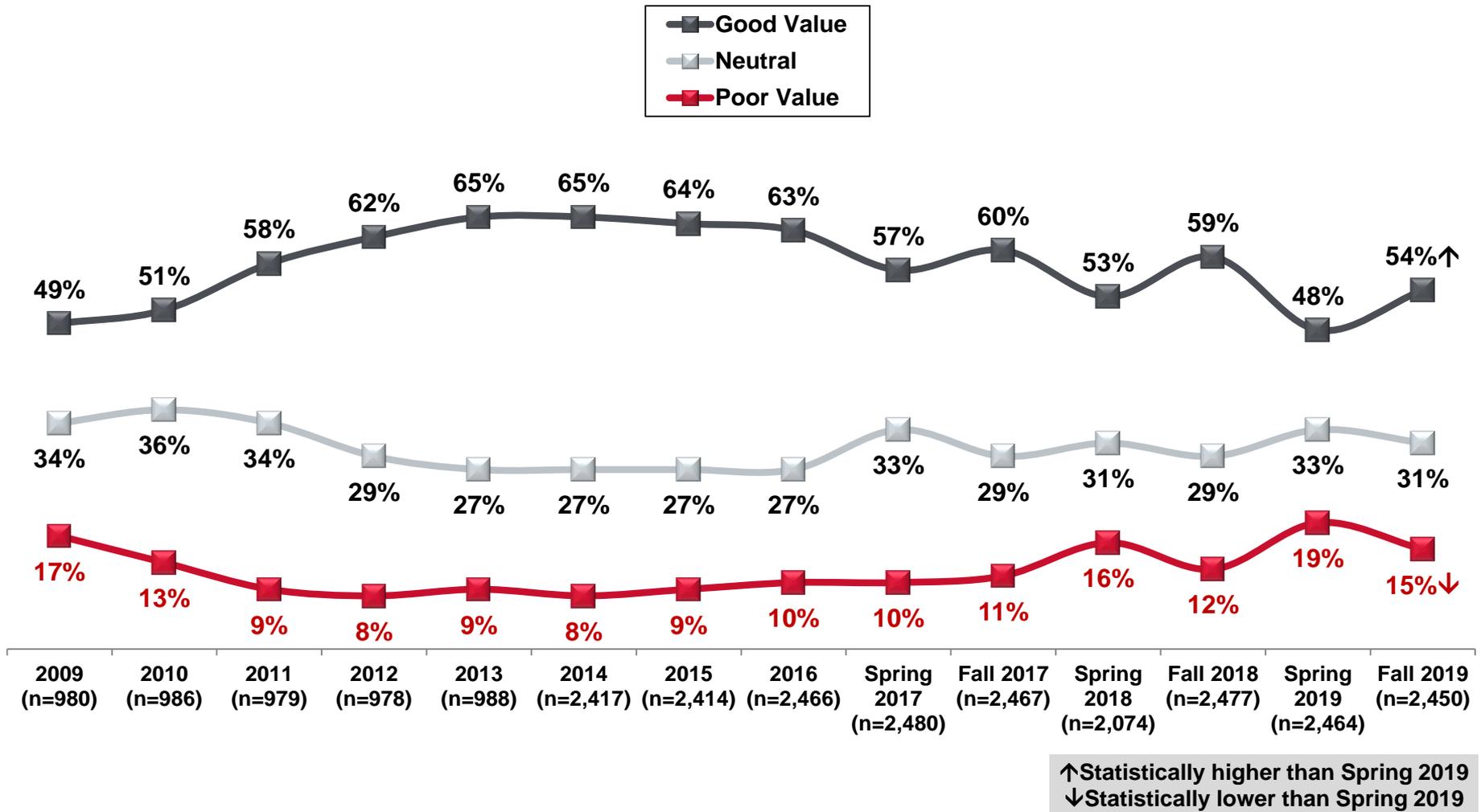
*In your view, as a resident of the city of Calgary, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders?*

Base: Valid respondents

↑ Statistically higher than Spring 2019  
 ↓ Statistically lower than Spring 2019



# Tracking Perceived Value of Property Taxes



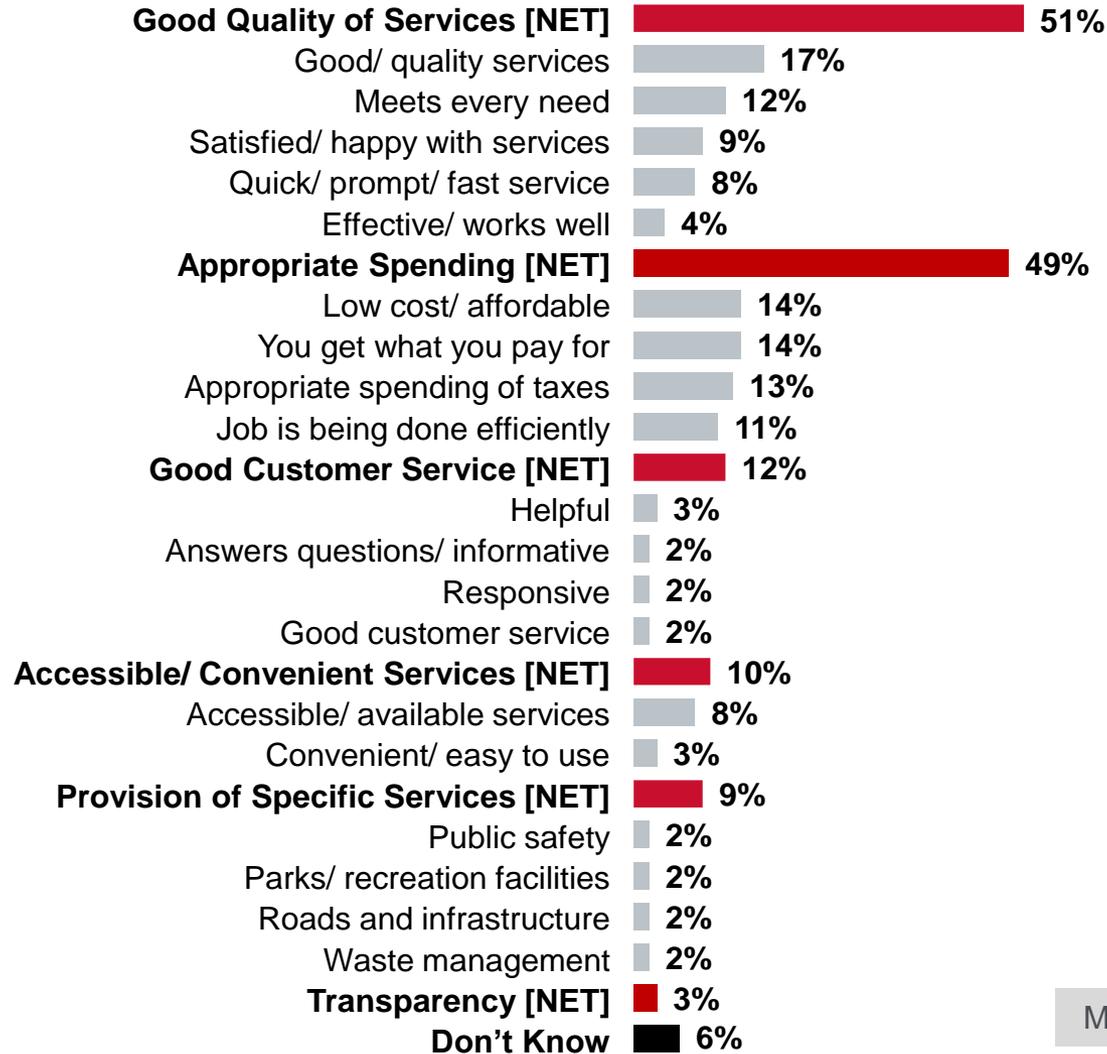
Your property tax dollars are divided between The City and the Province. In Calgary, approximately half of your property tax bill goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars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

Base: Valid respondents



# Definition of 'Value for Taxpayer Dollars'

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



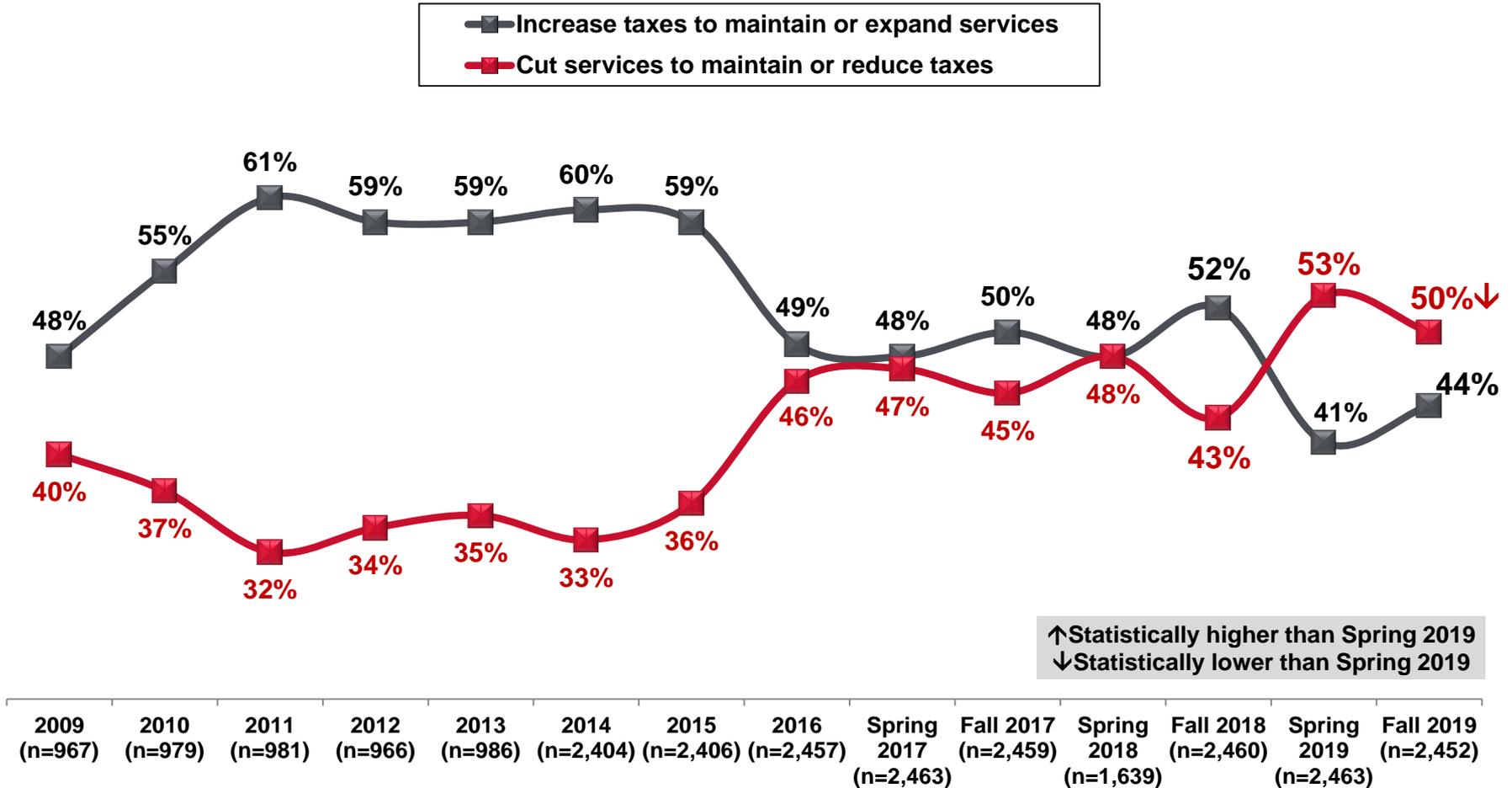
Multiple mentions allowed

NET mentions of <3% are not shown

*New Question in Fall 2019: When it comes to the services The City of Calgary provides, what does 'value' mean to you? In other words, if you say you're 'getting good value' for a service, what does that mean?* Base: Valid respondents (n=2,502)



# 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



# City Programs & Services: Satisfaction | Importance | Investment

	Importance (very + somewhat)	Satisfaction	Investment		
			More	Same	Less
Calgary Fire Department	100%	98%	44%	55%	2%
Calgary Police Service	99%	92%	54%	42%	3%
911	99%	98%	34%↓	66%	1%
Drinking water	99%	95%	27%↓	72%	1%
Residential garbage collection	98%	90%	19%	75%	7%
Road maintenance	98%	73%↑	54%↓	44%	2%
Snow removal	98%	75%↑	52%↓	45%	3%
Roads and infrastructure	97%↓	84%	46%↓	49%	5%
Parks, playgrounds, open spaces	97%	93%	41%↑	55%	4%
Social services	97%	84%↓	62%	35%	3%
Traffic flow management	96%	69%	51%↓	45%	4%
Disaster planning and response	95%	95%	23%↓	71%	5%

↑Statistically higher than Fall 2018

↓Statistically lower than Fall 2018



# City Programs & Services: Satisfaction | Importance | Investment

	Importance (very + somewhat)	Satisfaction	Investment		
			More	Same	Less
Transportation planning	95% ↓	77%	50% ↓	43%	6%
Affordable housing	93%	69%	63%	31%	6%
Property tax assessment	93%	64% ↓	27% ↑	54%	19%
City land use planning	93%	79% ↓	34% ↑	57%	9%
City growth management	93%	75% ↓	40% ↑	48%	11%
Calgary's pathway system	93%	93% ↓	32%	61%	7%
City operated recreation facilities	93% ↑	89% ↓	42% ↑	51%	7%
Spring road cleaning	92% ↓	92%	18% ↓	75%	8%
Residential Blue Cart recycling	91%	90%	17%	70%	13%
311 service	91%	93%	21% ↑	73%	7%
Calgary Transit - bus and CTrain	90% ↓	79%	56% ↓	39%	5%

↑Statistically higher than Fall 2018

↓Statistically lower than Fall 2018



# City Programs & Services: Satisfaction | Importance | Investment

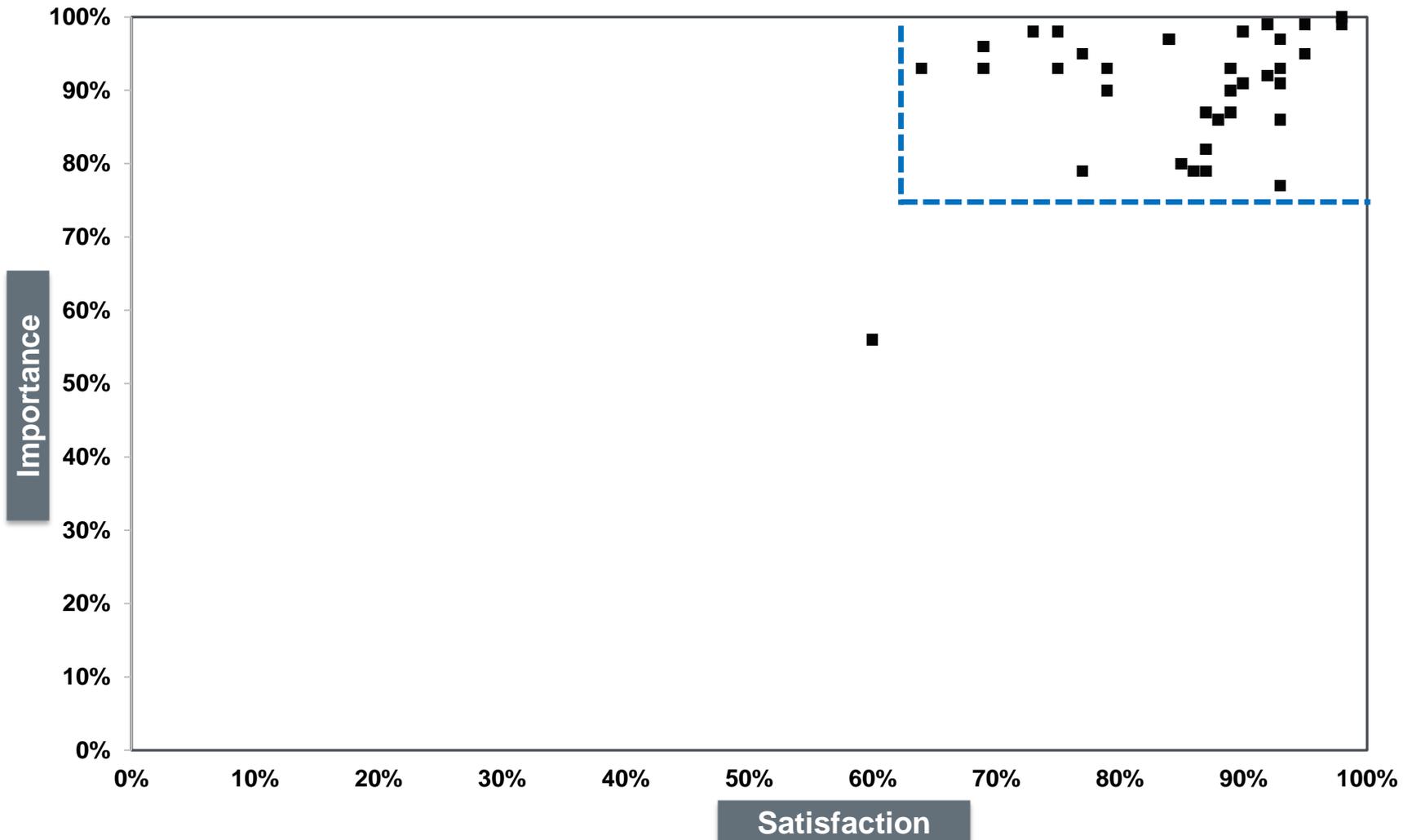
	Importance (very + somewhat)	Satisfaction	Investment		
			More	Same	Less
Community services	90%	89% ↓	35% ↑	54%	10%
City operated recreation programs	87% ↑	89% ↓	37% ↑	55%	8%
Development / building inspections and permits	87%	87%	26% ↑	66%	8%
Protection from river flooding	86%	93%	27% ↓	63%	10%
Business licenses and inspections	86%	88% ↓	24% ↑	68%	8%
Residential Green Cart	82%	87%	11%	67%	21%
Support for arts and culture	80%	85%	24%	52%	24%
Bylaw services	79%	87%	16% ↓	65%	19%
Downtown revitalization	79%	77% ↓	36% ↑	45%	19%
City of Calgary website	79%	86%	19%	70%	11%
Animal control services	77% ↓	93%	13% ↓	70%	17%
On-street Bikeways	56%	60% ↓	23%	34%	43%

↑Statistically higher than Fall 2018

↓Statistically lower than Fall 2018

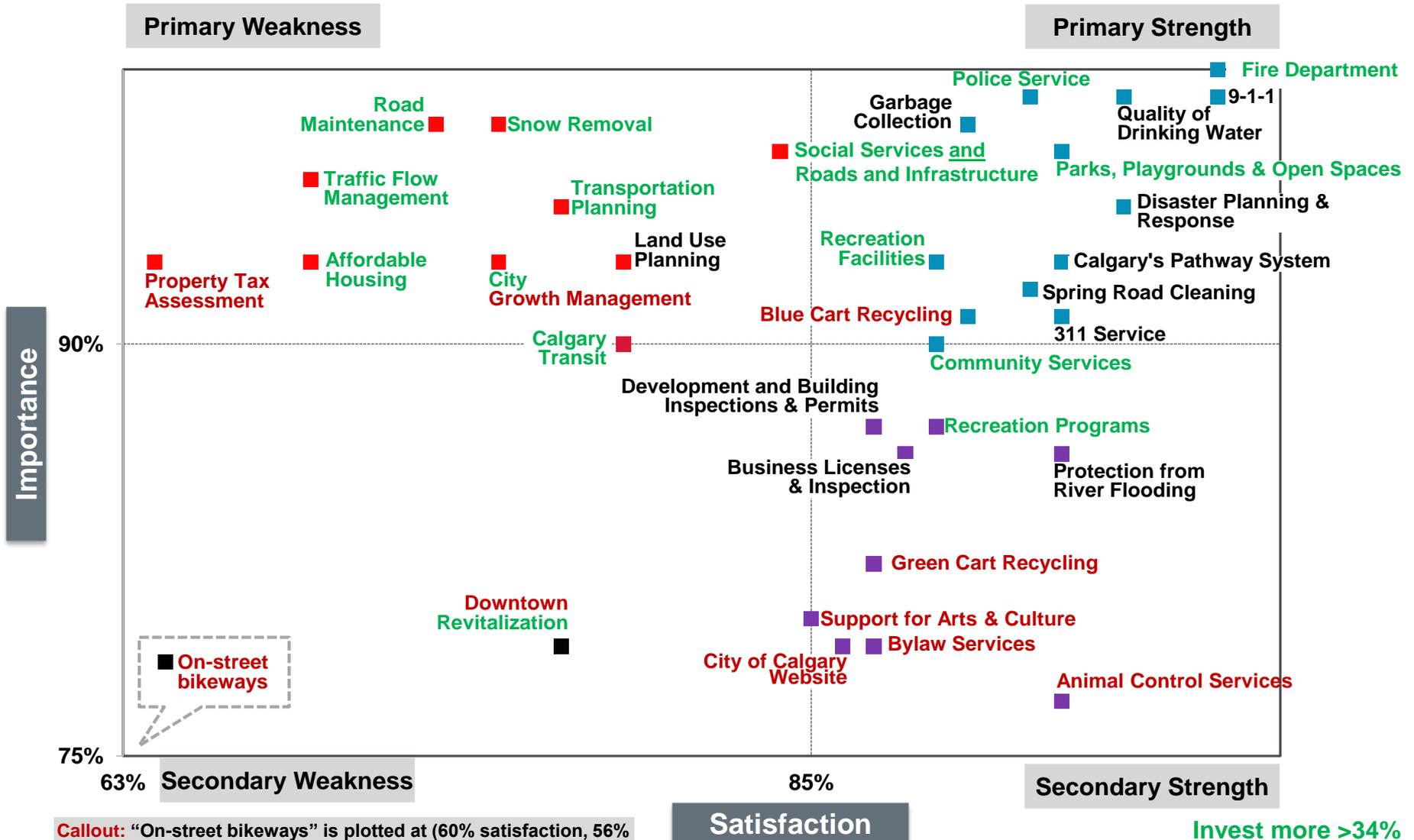


# Importance vs. Satisfaction Grid





# Importance vs. Satisfaction Grid



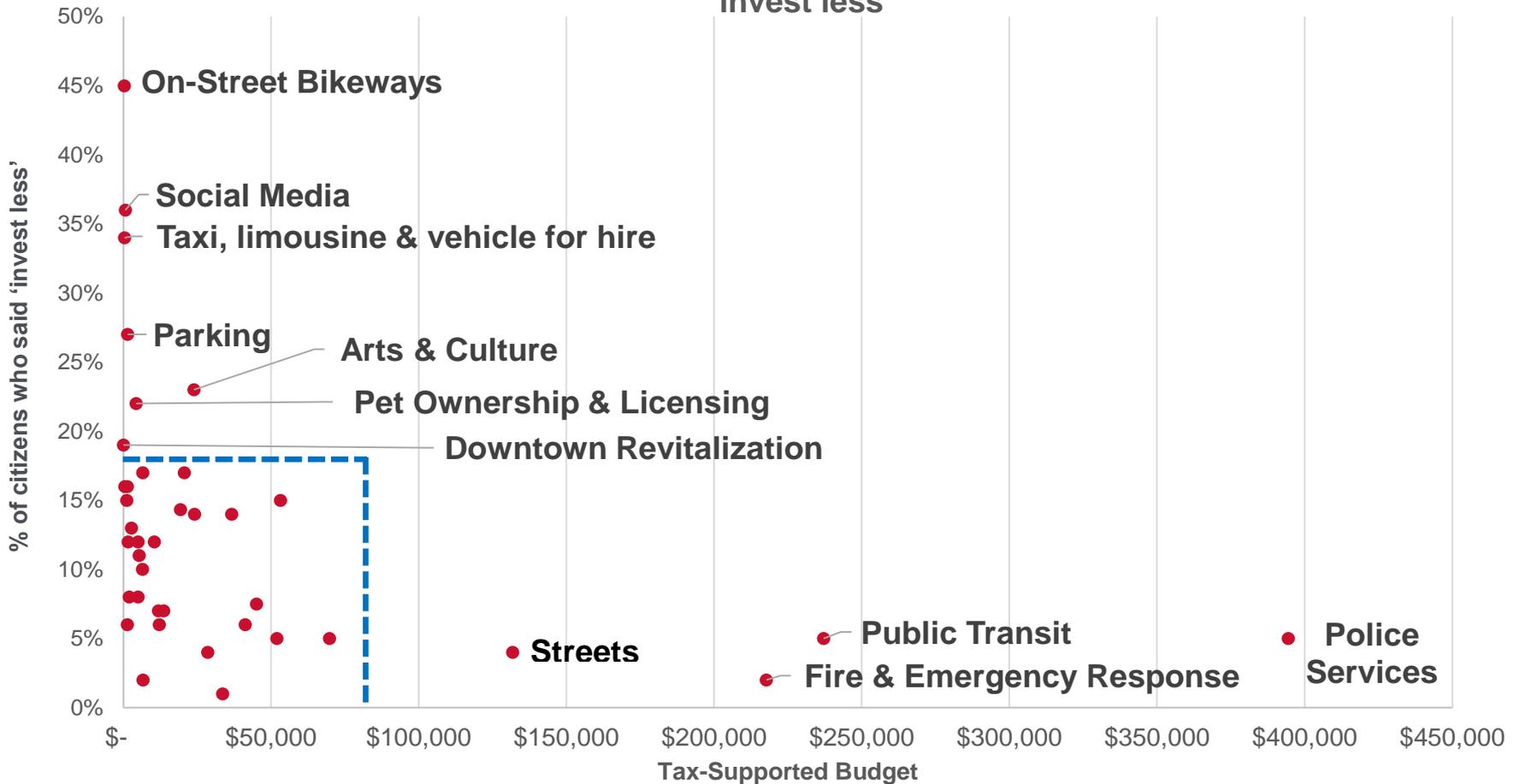
**Callout:** "On-street bikeways" is plotted at (60% satisfaction, 56% importance) and is illustrated on this graph in the callout box.

**Invest more >34%**  
**Invest less >10%**



# 'Invest Less' and Tax-Supported Budget

Services by Tax-Supported Budget (\$000) and % of citizens who said to 'invest less'

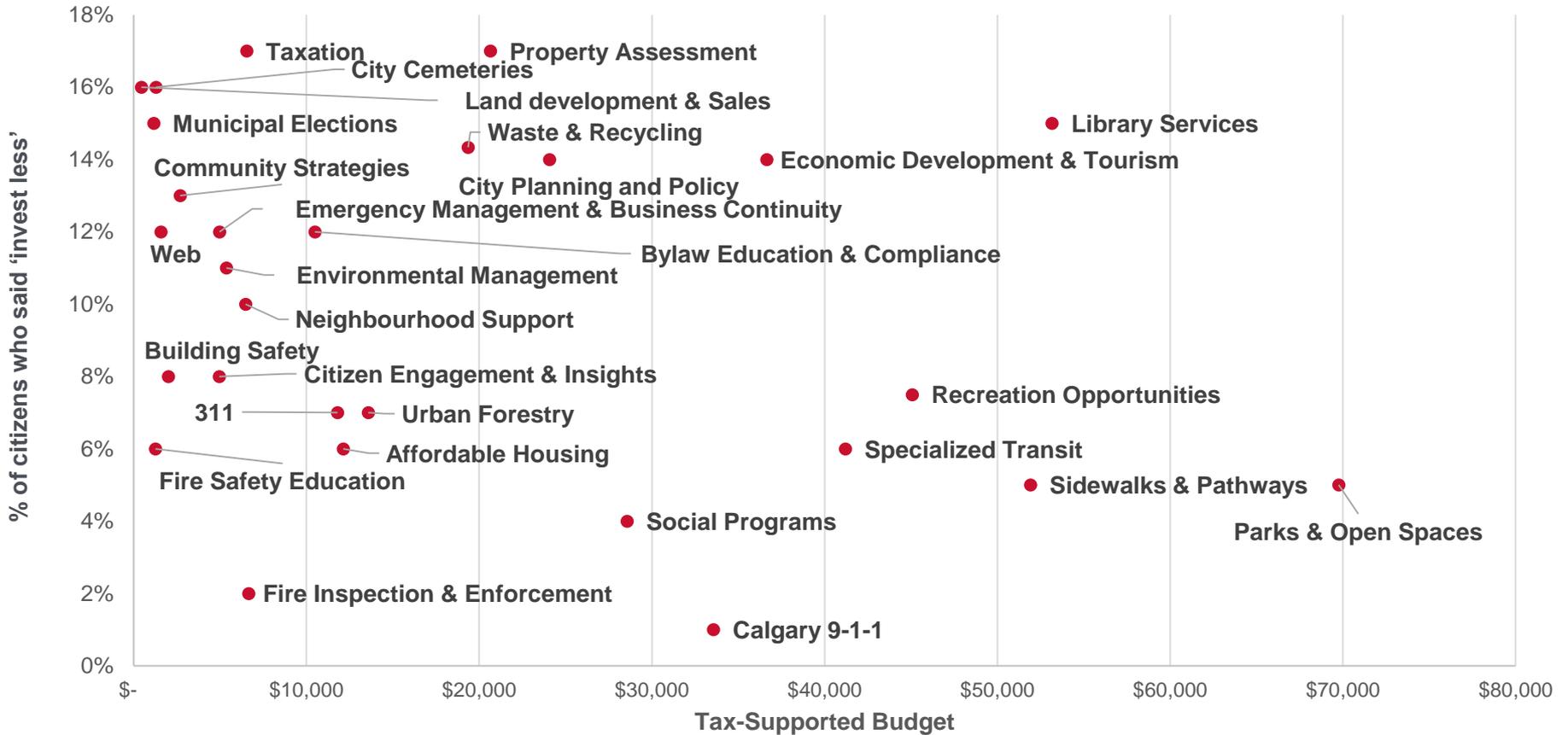


Source: Spring Pulse Survey – 2019 | One Calgary Plans and Budget



# 'Invest Less' and Tax-Supported Budget

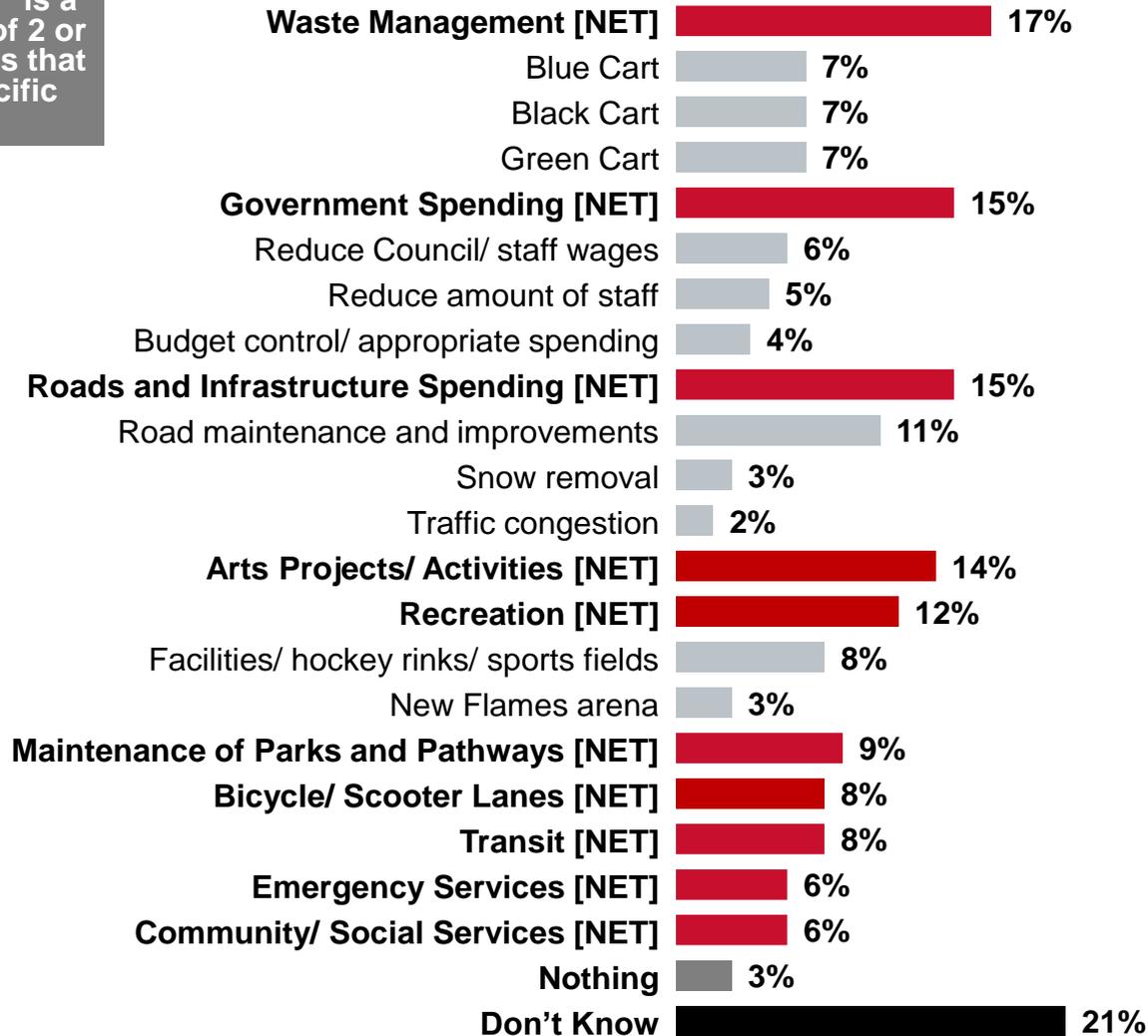
Services that receive less than \$70M in tax supported budget (\$000) and less than 17% of citizens who said to 'invest less'





# Proposed Service Reductions

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



Multiple mentions allowed

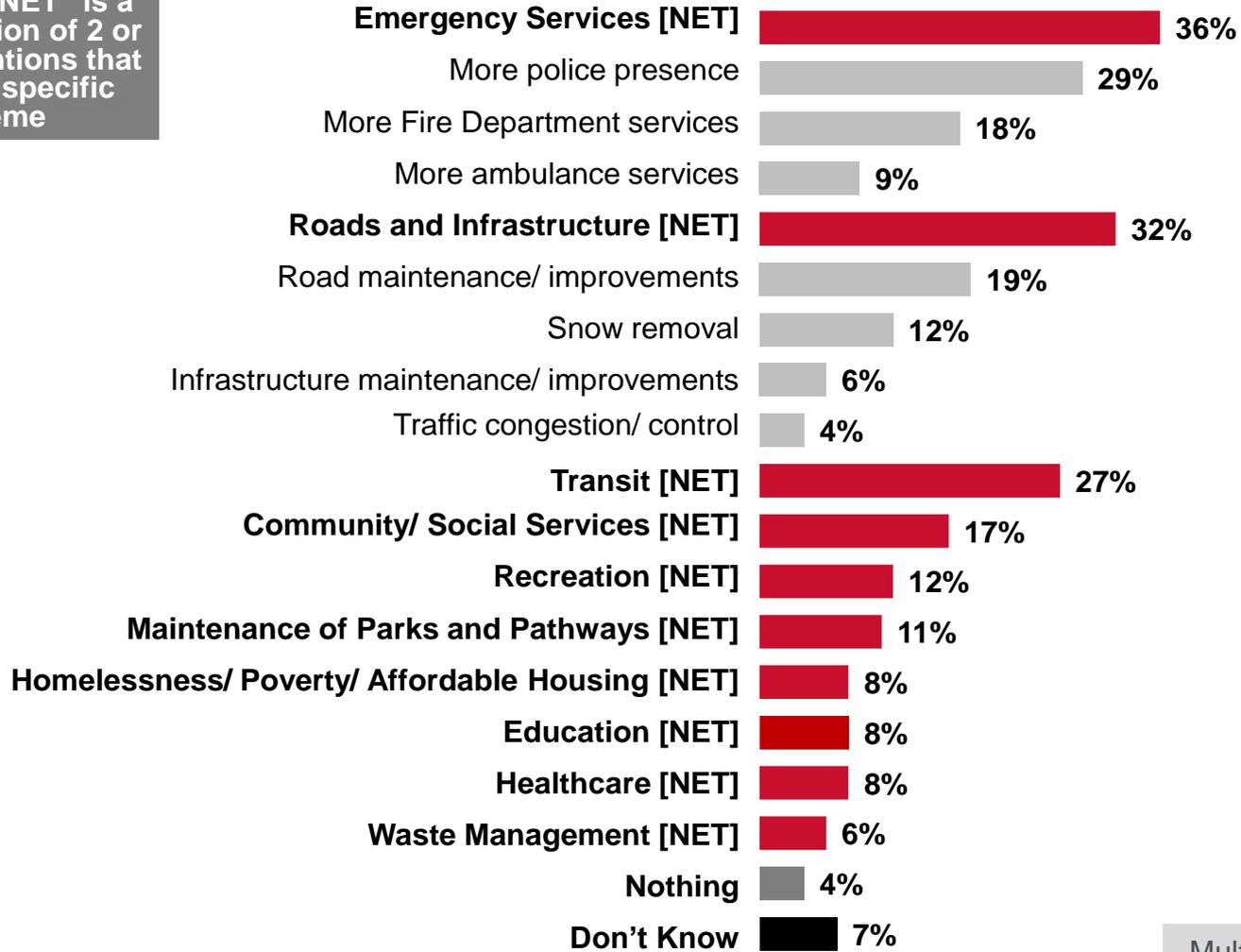
NET mentions of ≤5% are not shown

*New Question in Fall 2019: Of all the services you know of that are provided by The City of Calgary, name up to three services that you would propose to have a service reduction in order to save costs. Base: Valid respondents (n=2,502)*



# Proposed Service Increases

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



Multiple mentions allowed

NET mentions of ≤5% are not shown

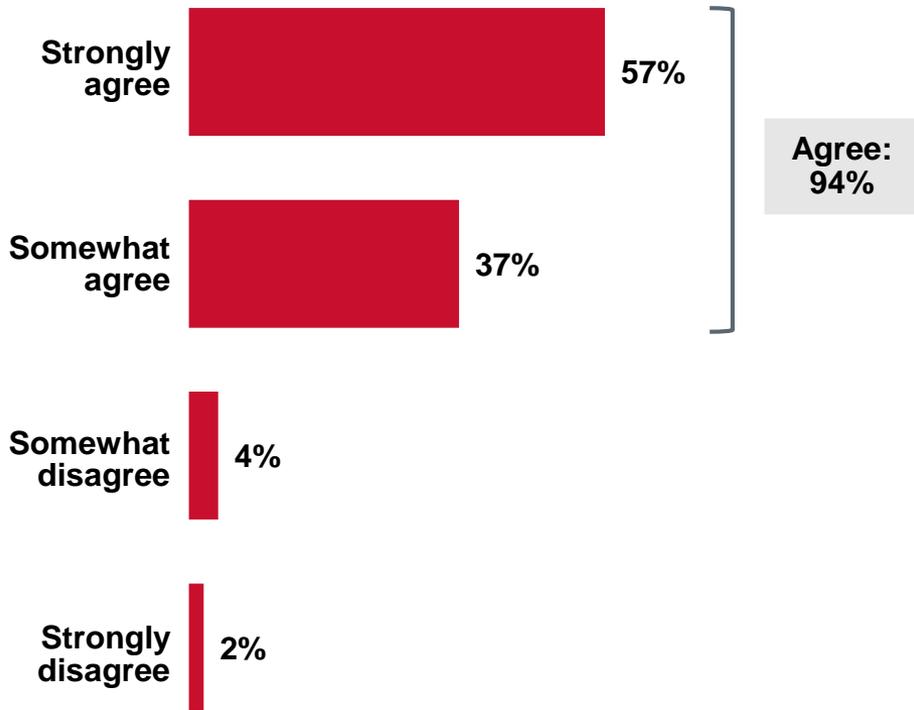
*New Question in Fall 2019: Again, considering all the services that you know The City of Calgary provides, name up to three services that you would propose to spend more on to receive an increase in service.*

Base: Valid respondents (n=2,502)

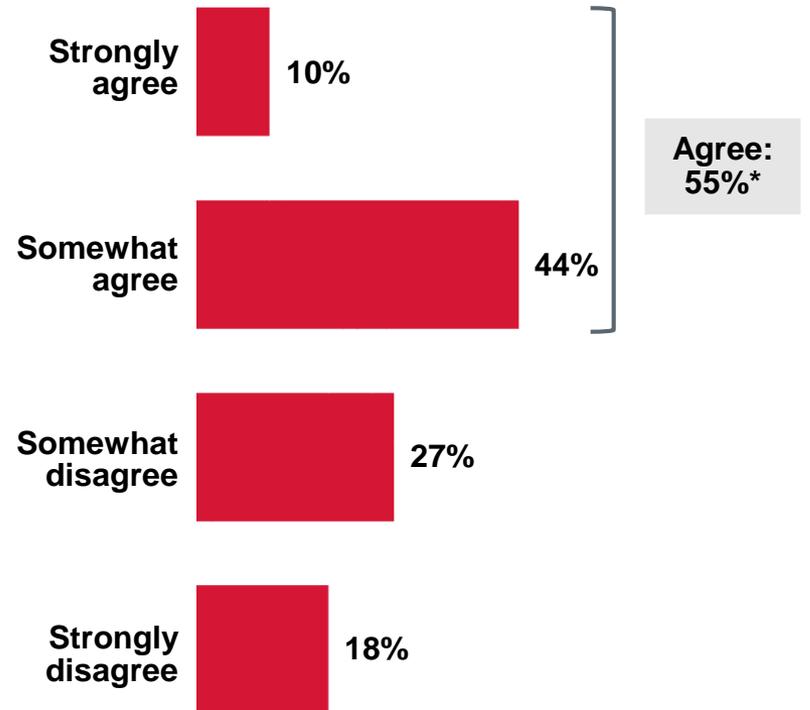


# Property Tax Dollar Investment

*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*



*Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.*

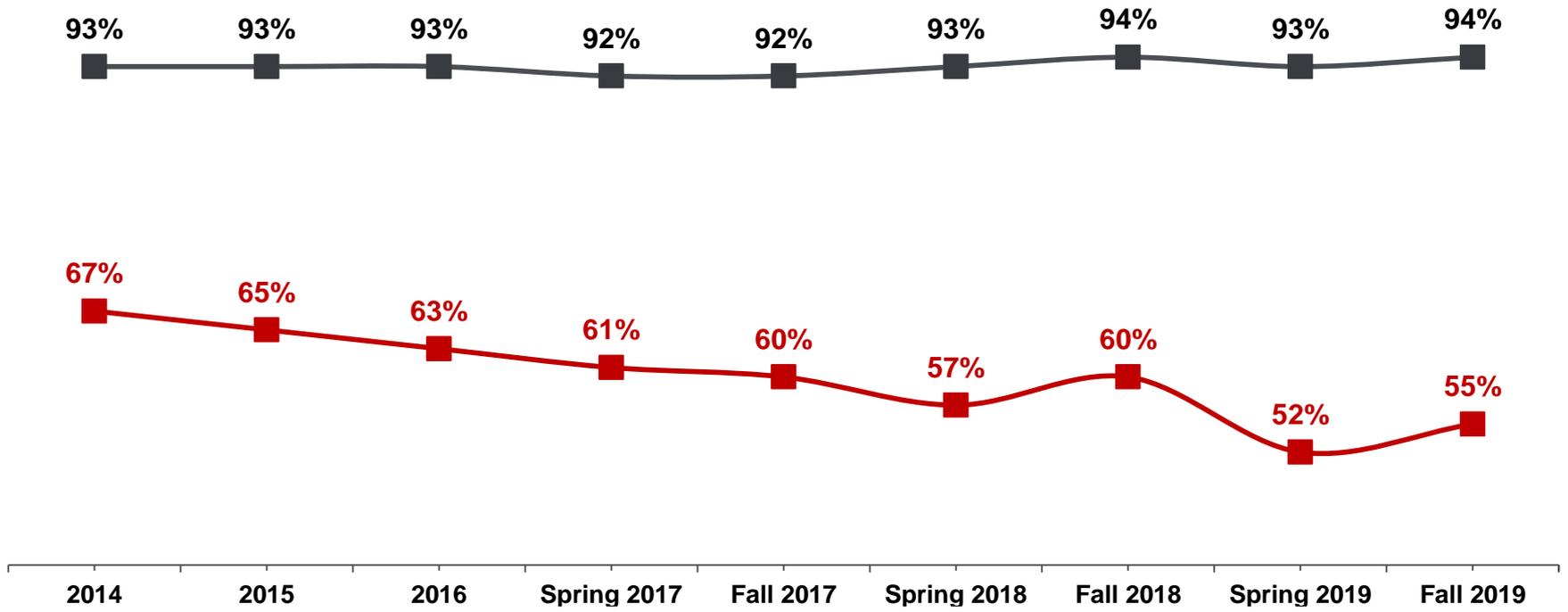
Base: Valid respondents (n=2,487 / n=2,465)

\*Rounding



# Property Tax Dollar Investment: Tracking

■ I am interested in knowing how my property tax dollars are invested in various City services (Agree)  
■ The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services (Agree)



Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

Bases vary: Valid respondents 2019 (n=2,487 / n=2,465)



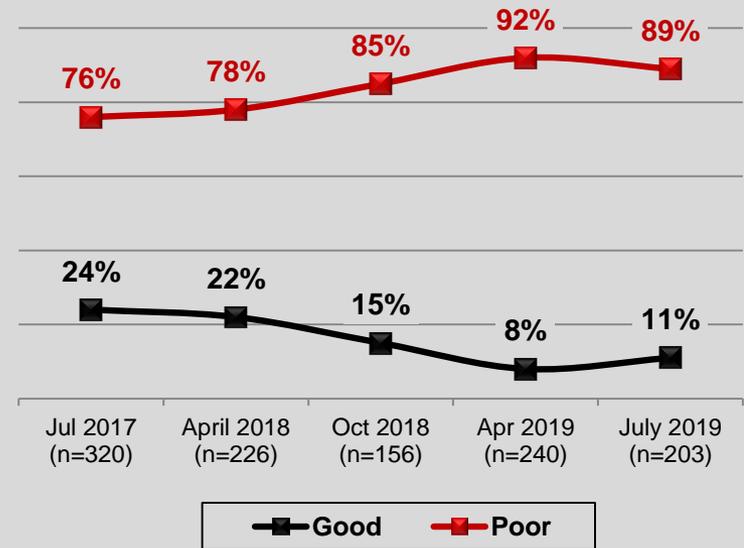
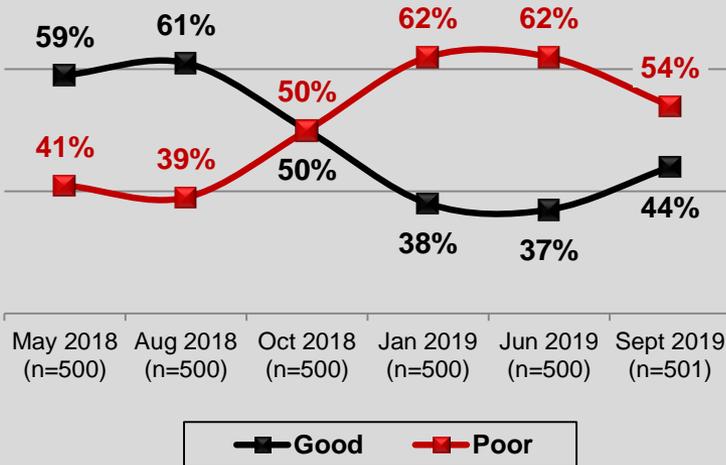
# 2019 Perception of the Economy Snapshot

*Citizens who rate the current economic situation in Calgary as "good."*

**44%**

*Businesses that rate the current economic situation in Calgary as "good."*

**11%**



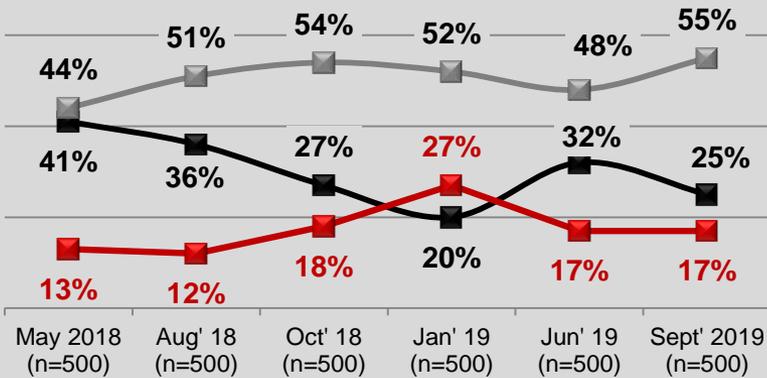
Source: Economic Perspectives Survey – 2019 Wave 3 | Business Perspectives Survey – 2019 Wave 2



# 2019 Perception of the Future of the Economy Snapshot

*Citizens who expect the economy to be stronger in the next six months*

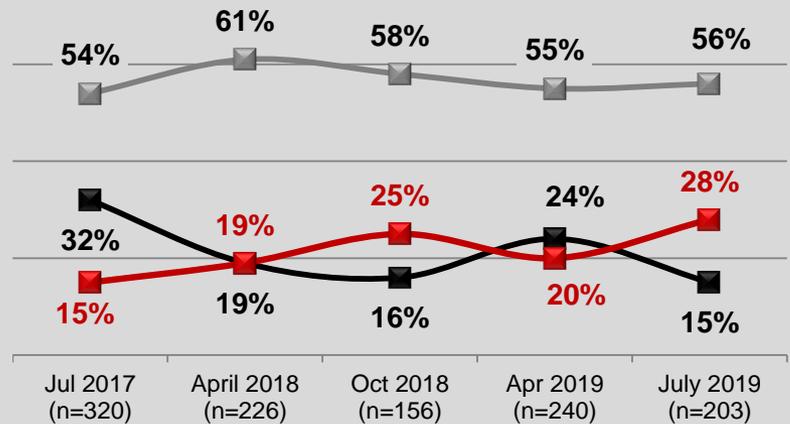
**25%**



— Stronger — About the same — Weaker

*Businesses that expect the economy to be stronger in the next six months*

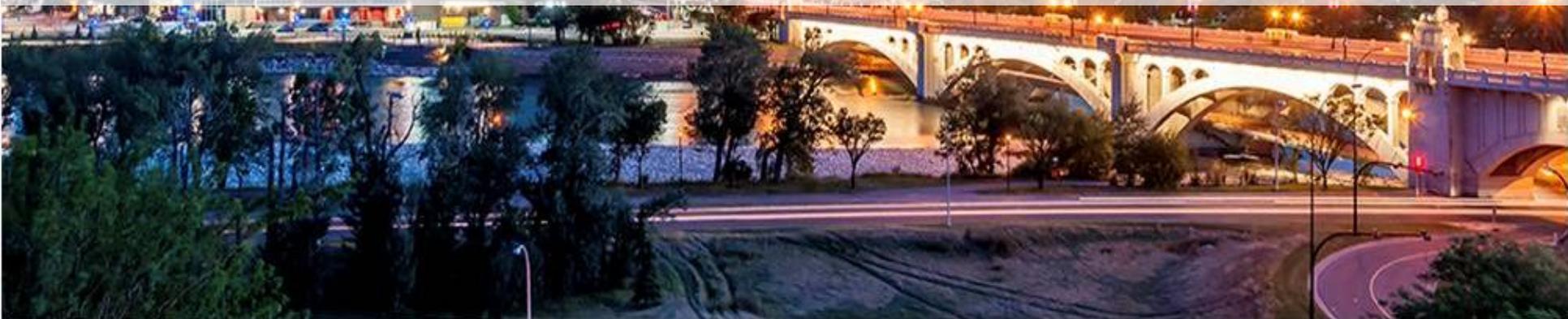
**15%**



— Stronger — About the same — Weaker

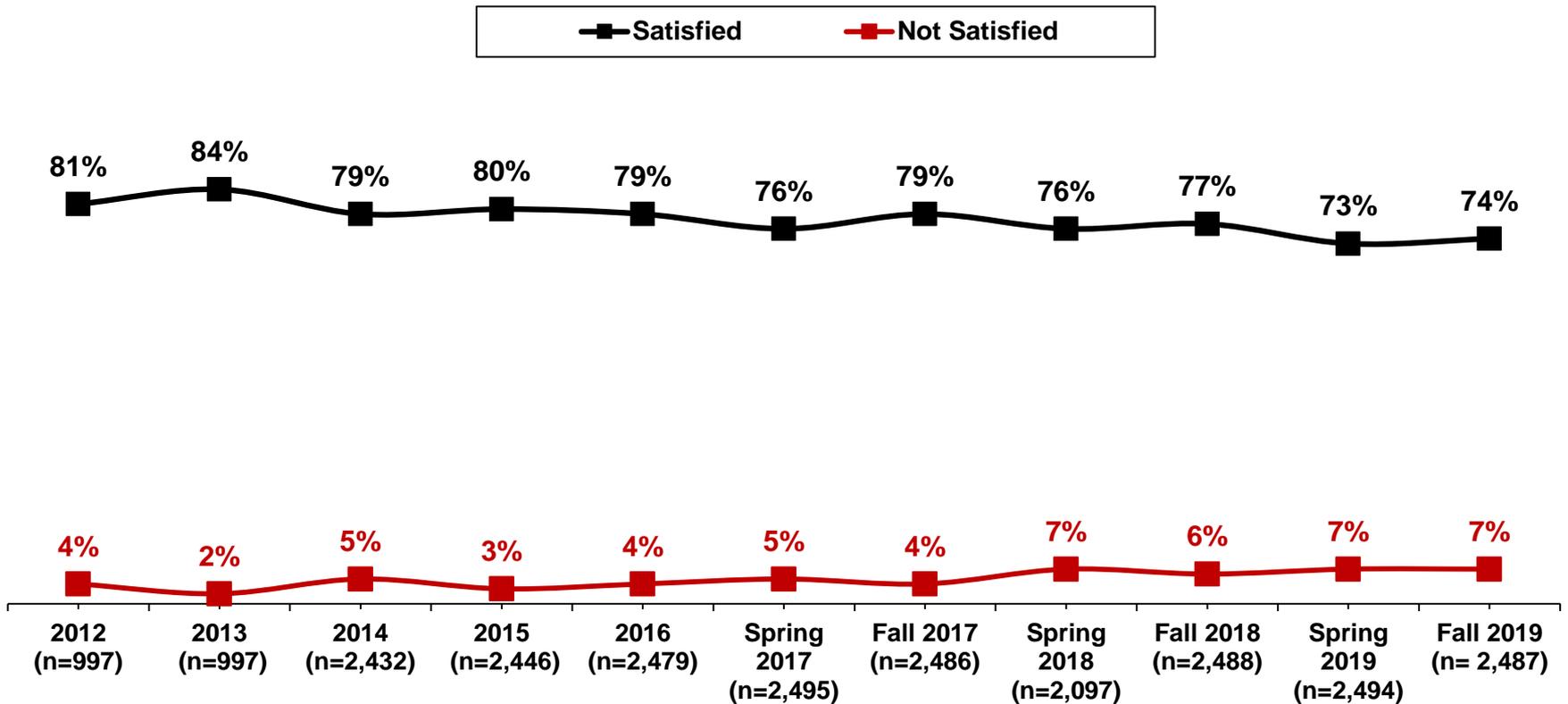


## City Programs and Services





# 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



# 2019 Customer Service Snapshot

**79%↓**

*Calgarians agree “The City of Calgary makes customer service a priority.”*

**92%**

*Calgarians agree “City staff are courteous, helpful, & knowledgeable.”*

**72%**

*Calgarians agree “The City responds quickly to requests and concerns.”*

**43%**

*Businesses agree “The City of Calgary makes customer service a priority.”*

**62%**

*Businesses agree “City staff are courteous, helpful, & knowledgeable.”*

**36%**

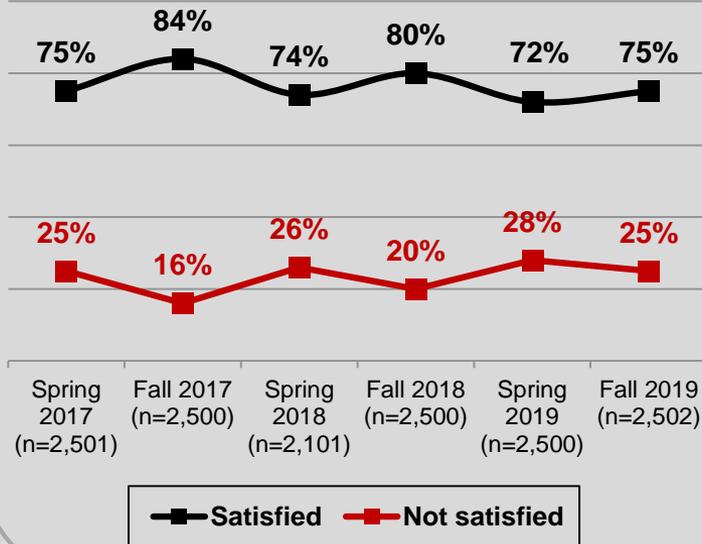
*Businesses agree “The City responds quickly to requests and concerns.”*



# Overall Quality of City Information & Communications | Amount of Information Accessible

# 75%

**Satisfied with the overall quality of City information and communications.**



# 2%

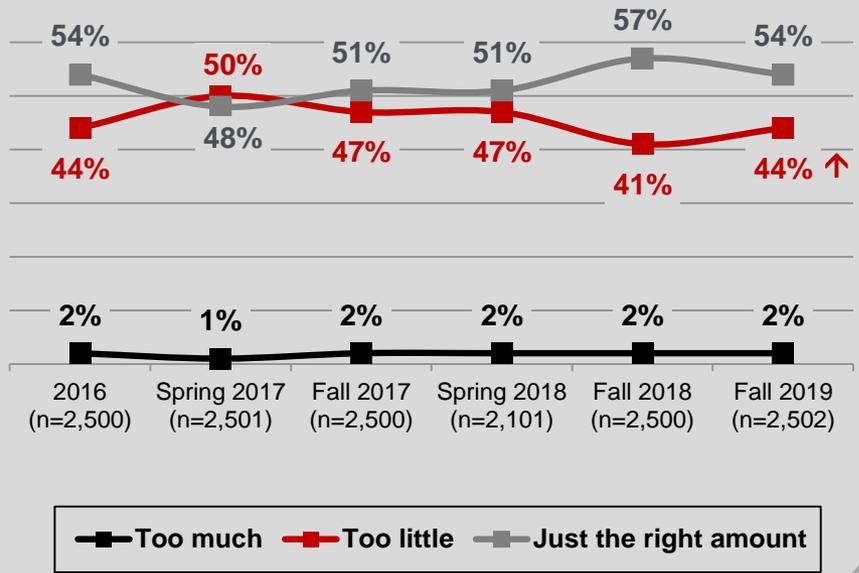
**Believe they have access to *too much* information**

# 44% ↑

**Believe they have access to *too little* information**

# 54%

**Believe they have access to *just the right amount* of information**

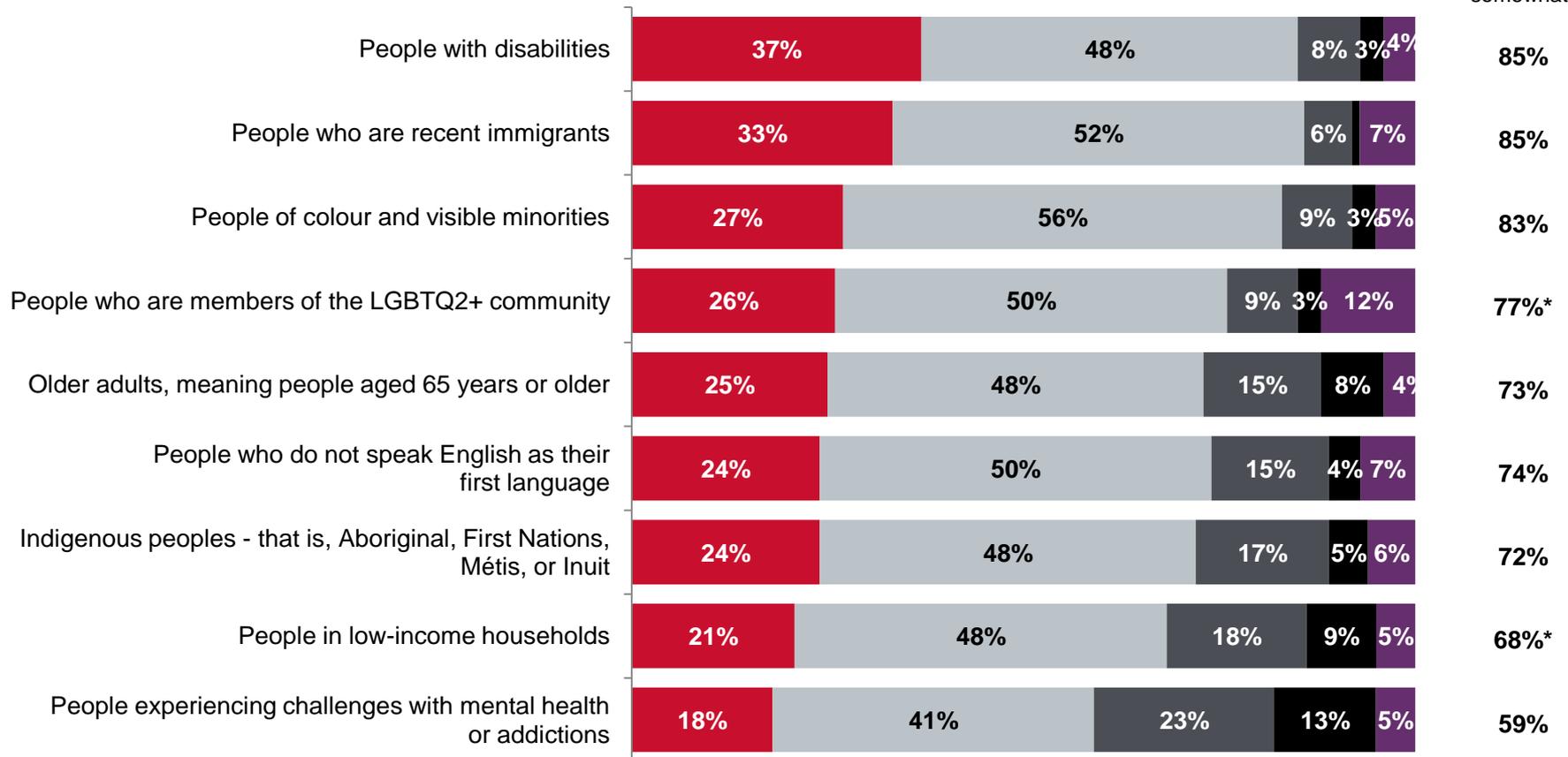




# City Programs & Services: Perceptions of Inclusiveness

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

Agree  
(strongly +  
somewhat)



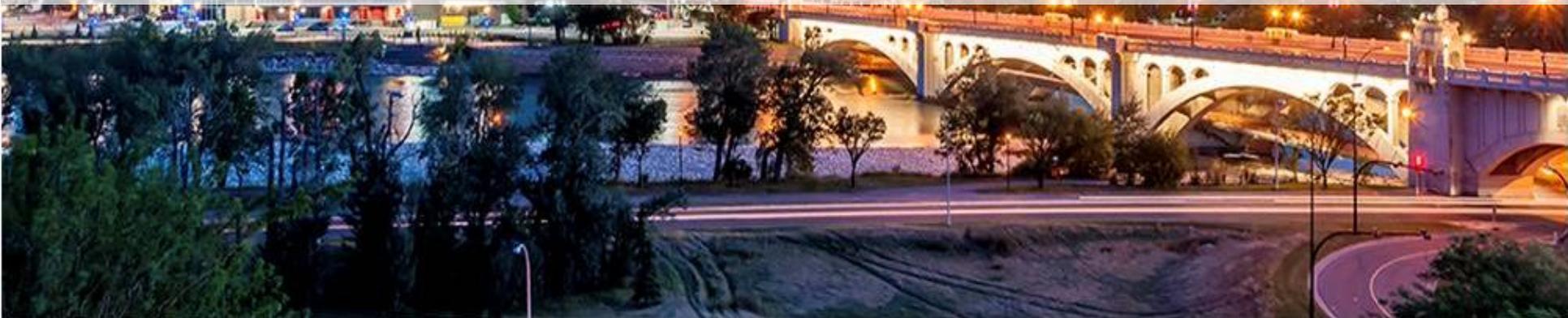
*As you know, there are many people living in Calgary who come from a variety of backgrounds and experiences. Please indicate the extent to which you agree or disagree that The City of Calgary meets the needs of the following groups of Calgarians. By The City of Calgary, we're referring to the municipal government and the services and programs it offers.*

Source: Citizen Perspectives Survey – 2019 Wave 3 | Base: All respondents (n=500)

\*Rounding



## City Reputation and Performance

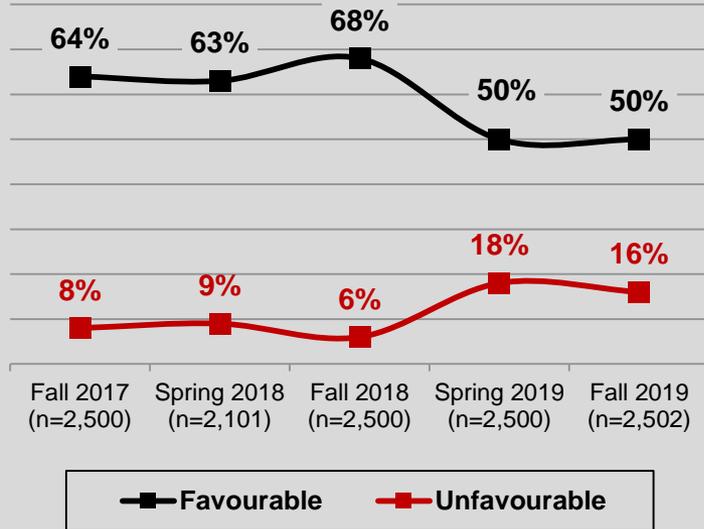




# Favourability Towards The City: Citizens & Businesses

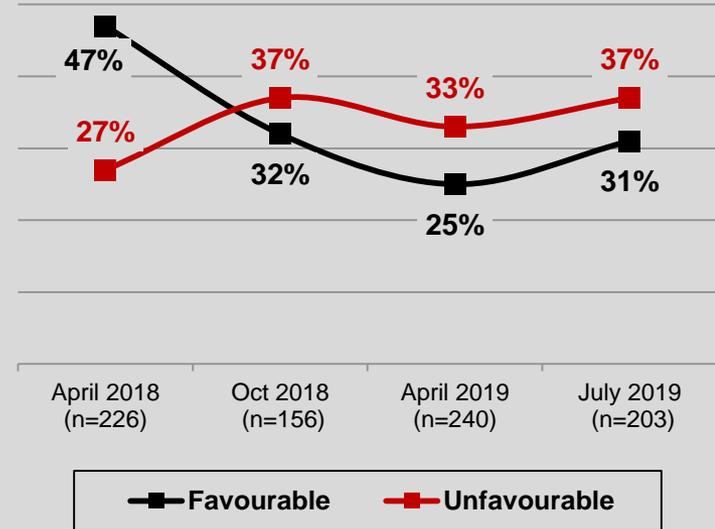
*Percentage of citizens with a favourable impression or opinion of The City.*

**50%**



*Percentage of businesses with a favourable impression or opinion of The City.*

**31%**

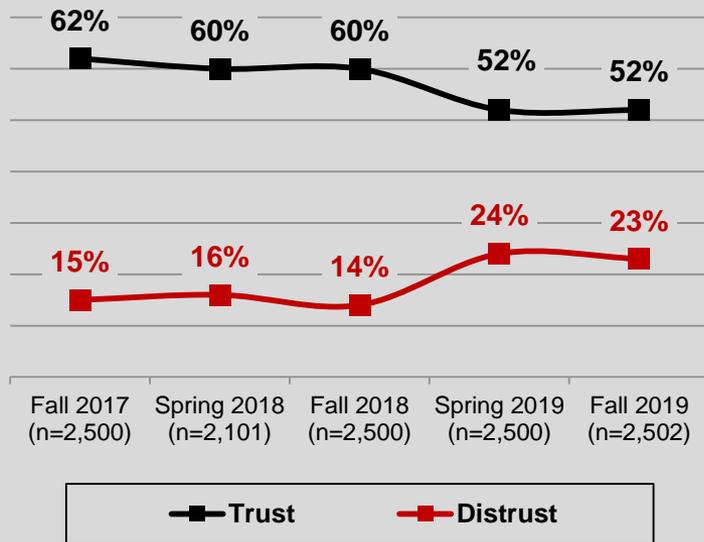




# Trust in The City: Citizens & Businesses

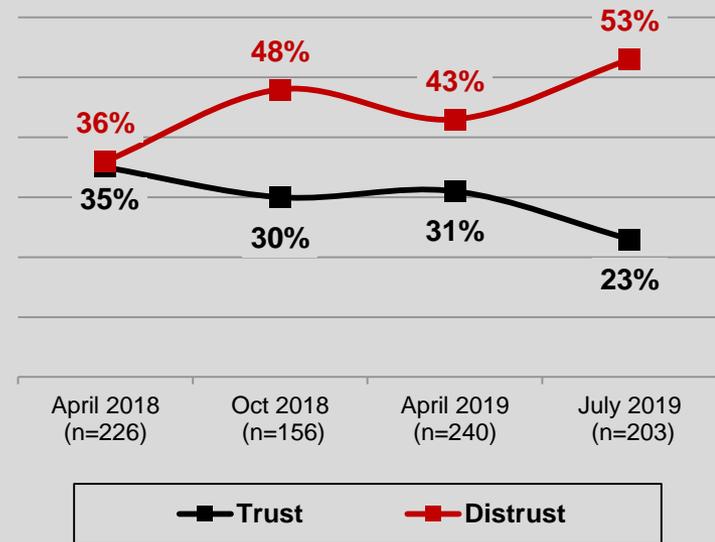
Percentage of citizens who say they trust The City.

**52%**



Percentage of businesses who say they trust The City.

**23%**

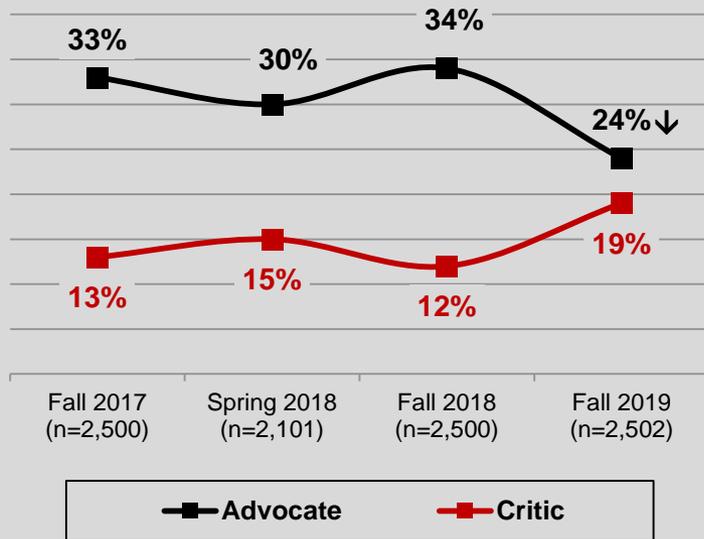




# Advocacy: Citizens & Businesses

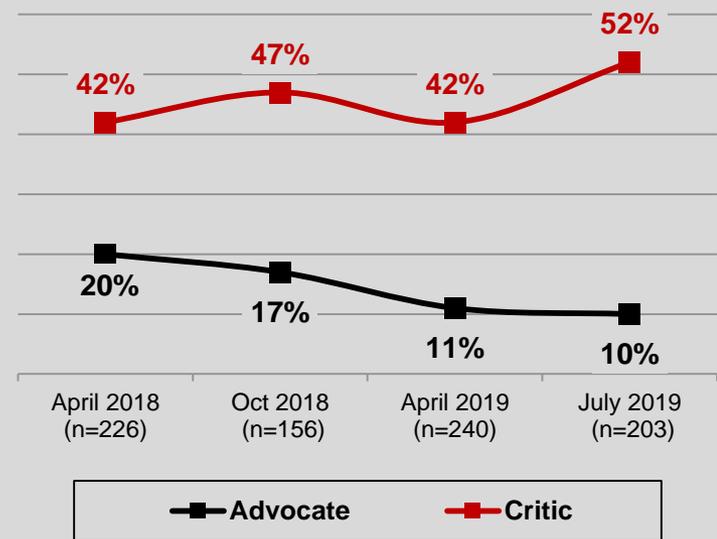
Percentage of citizens who say they are “advocates” of The City

**24%** ↓



Percentage of businesses who say they are “advocates” of The City

**10%**

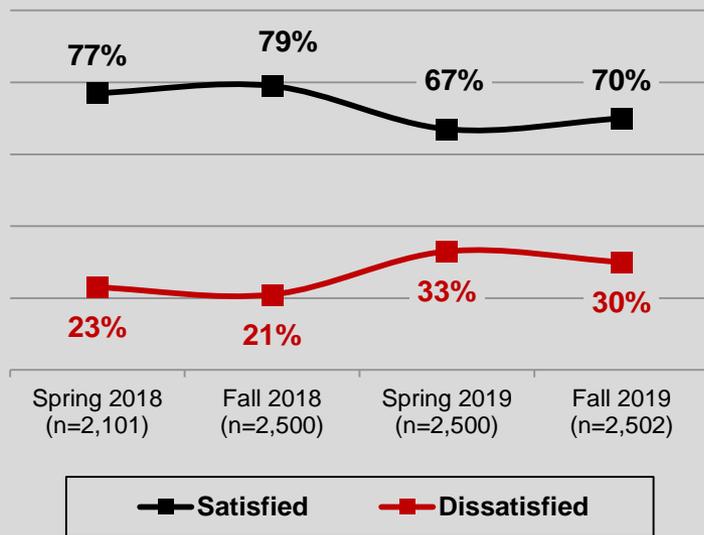




# Perceptions of City Leadership Performance: Citizens & Businesses

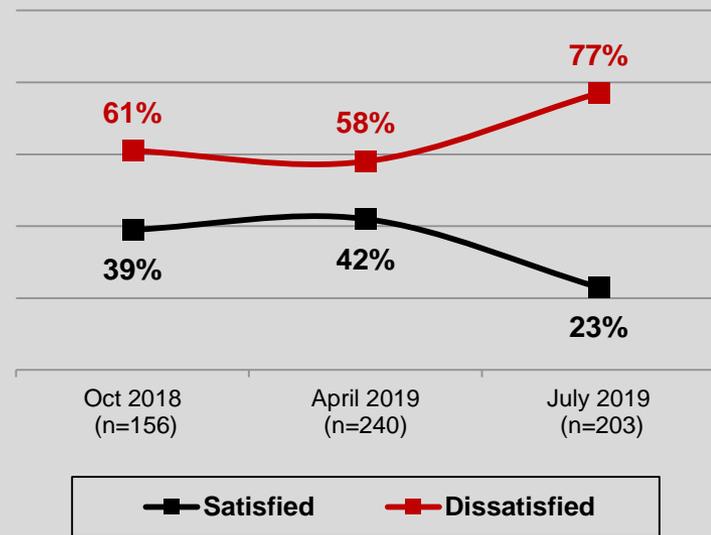
Percentage of **Calgarians** satisfied with how The City of Calgary – including Council and Administration – is running the city.

**70%**



Percentage of **businesses** satisfied with how The City of Calgary – including Council and Administration – is running the city.

**23%**

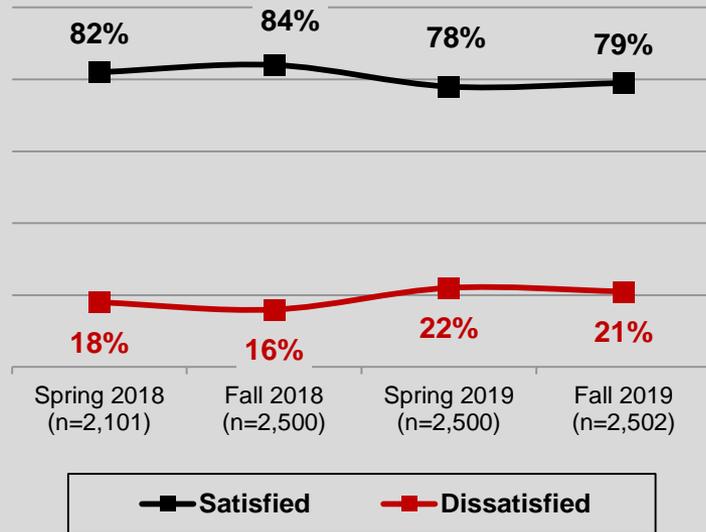




# Perceptions of City Leadership Performance: Citizens & Businesses

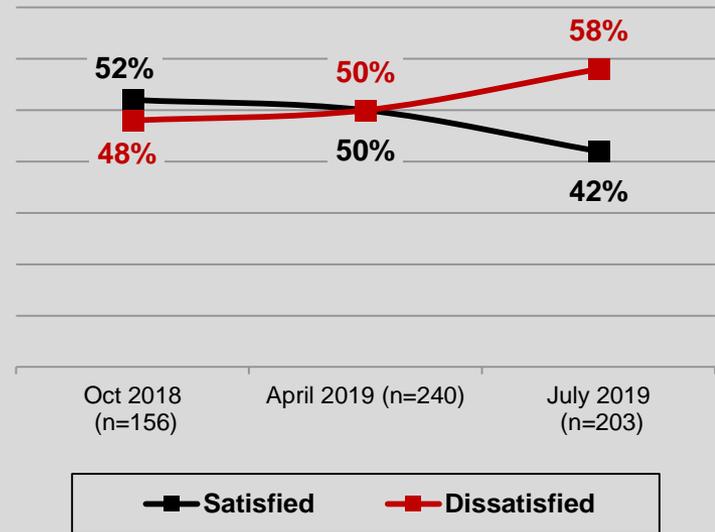
Percentage of **Calgarians** satisfied with how City Administration (excluding Council) is running the city.

## 79%



Percentage of **businesses** satisfied with how City Administration (excluding Council) is running the city.

## 42%

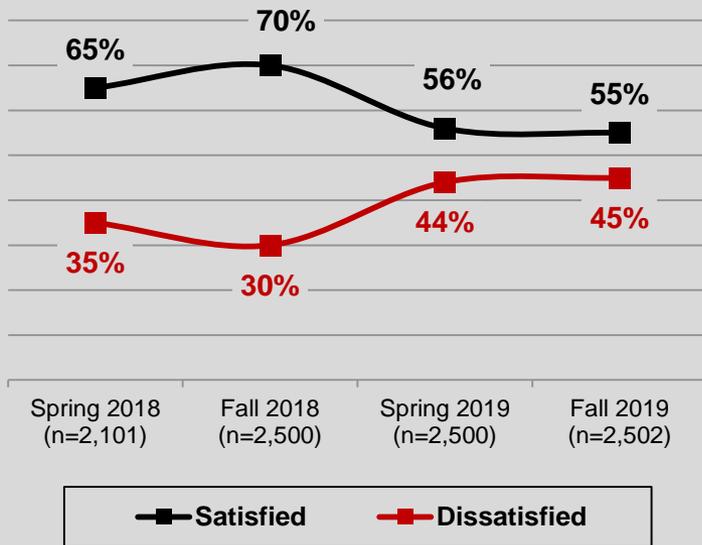




# Perceptions of City Leadership Performance: Citizens & Businesses

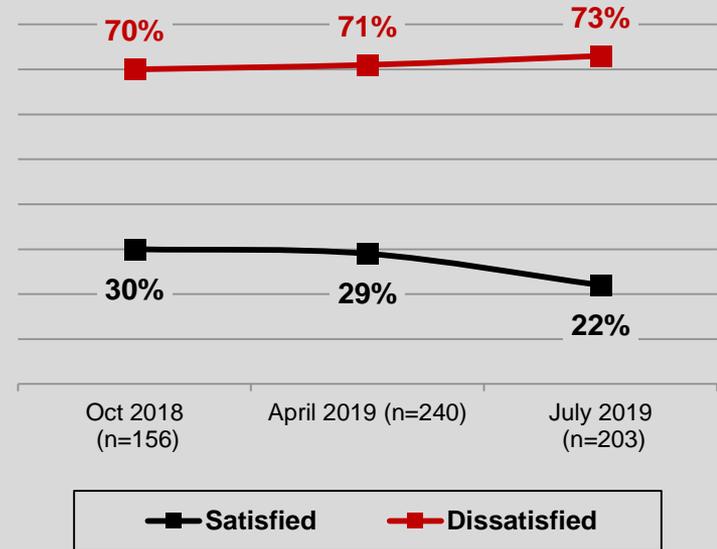
Percentage of **Calgarians** satisfied with how City Council (excluding Administration) is running the city

**55%**



Percentage of **businesses** satisfied with how City Council (excluding Administration) is running the city

**22%**



Source: Citizen Satisfaction Survey – Fall 2019 | Business Perspectives Survey – 2019 Wave 2



# Perceptions Collaboration, Transparency, and Citizen Input

Calgarians who agree City Council and City Administration work collaboratively to make the best possible decisions for the future of Calgary

**66%**

**71%**

Agree The City of Calgary practices open and accessible government

**68%**

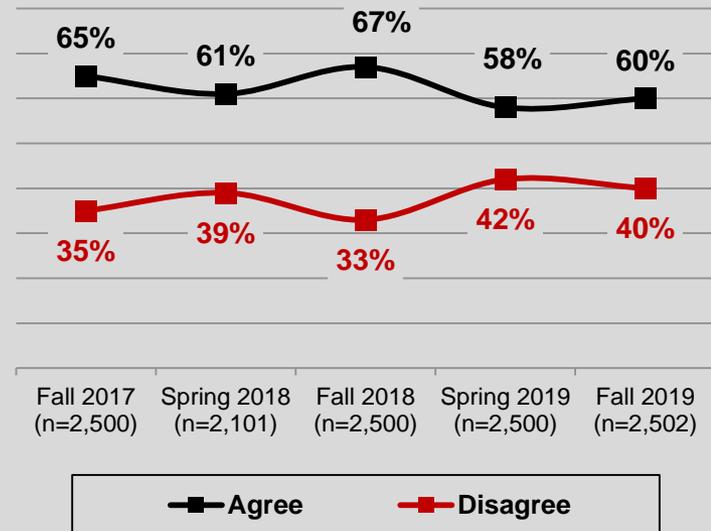
Agree The City of Calgary is working to improve how it includes citizen input into important decisions

**65%**

Agree The City uses input from Calgarians in decision-making about City projects and services

Calgarians who agree The City allows citizens to have meaningful input into decision-making

**60%**



# Contact

## City Contact:

Krista Ring  
Manager: Web, Research, and Projects  
The City of Calgary  
403-268-9963 | 403-988-9425  
[Krista.Ring@calgary.ca](mailto:Krista.Ring@calgary.ca)