

Calgary



2019 Quality of Life and Citizen Satisfaction Survey

Report

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Respondent Profile



Telephone survey conducted with a randomly selected sample of 2,502 Calgarians aged 18 years and older between August 19th and September 16th, 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 ± 2.0 percentage points, 19 times out of 20.

- The margin of error by quadrant is as follows:
 - Northeast: n=476 (MOE ± 4.5)
 - Northwest: n=737 (MOE ± 3.6)
 - Southeast: n=552 (MOE ± 4.2)
 - Southwest: n=737 (MOE ± 3.6)



Where possible, **results are compared** to previous iterations of the Quality of Life and 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:
 - \uparrow indicates number is significantly higher than Fall 2018/ Spring 2019
 - \downarrow indicates number is significantly lower than Fall 2018/ Spring 2019.



Highlights





- 1.** Perceptions about the quality of life in Calgary remain strong and are up from Spring 2019; however, perceptions of a ‘worsened’ quality of life have statistically risen since Fall 2018.
- 2.** “Infrastructure, traffic and roads” continues to dominate the issue agenda, although down from Fall 2018, and “budget and spending”, “taxes” and the “economy” have gained prominence in 2019.
- 3.** Three-quarters of residents are satisfied with the overall level and quality of City services and programs, yet statistical decreases emerge for a number of specific services, most notably for property tax assessment, downtown revitalization, City growth management, on-street bikeways, and City land use planning.
- 4.** The top ranking services for which Calgarians want ‘more’ investment include affordable housing and social services, followed by Calgary Transit, Calgary Police Services, road maintenance and repair, snow removal, and traffic flow management.
- 5.** The perceived value of property tax dollars is lower than in Fall 2018, but is up from Spring 2019, and for the first time in Fall tracking, a preference for cutting services edges out support for increasing taxes.
- 6.** Satisfaction with The City’s customer service delivery remains strong, but has declined since Fall 2018.
- 7.** Overall satisfaction with the quality of information and communications remains solid, but is down from one year ago, while a slim majority of Calgarians say they have access to ‘just the right amount of information’ from The City and a higher proportion than last year now say they have access to ‘too little’ information.
- 8.** Results show an overall weakening of The City’s reputation, with favourability, trust, and advocacy experiencing significant declines since Fall 2018.
- 9.** Satisfaction with City Administration’s performance remains strong, but is notably down from one year ago, while perceptions related to City Council’s performance are significantly lower than in Fall 2018.
- 10.** Declines in perceptions of government transparency and opportunities for citizen input into decision-making also emerge in Fall 2019.

KEY FINDINGS

Quality of Life

Perceptions about the **quality of life in Calgary have increased since Spring 2019, yet remain lower than in Fall 2018.**

- In Fall 2019, 83% of Calgarians say the quality of life in Calgary today is 'good', statistically up from 79% in Spring 2019, yet remaining statistically lower than Fall 2018 (86%).
- Slightly less than one-half (44%) say the quality of life in Calgary has 'stayed the same' in the past three years, significantly lower than 49% in Fall 2018, yet on par with Spring 2019 (44%), while 40% say it has 'worsened', notably up from 29% in Fall 2018, yet consistent with 43% in Spring 2019.
 - Perceptions of an 'improved' quality of life (16%) remain statistically lower than in Fall 2018 (22%), but see a significant increase over Spring 2019 (13%).
- Agreement that 'Calgary is a great place to make a living' remains moderate (63%), but shows notable gains from Spring 2019 (57%), remaining notably lower than Fall 2018 (71%).
- Agreement that 'Calgary is a great place to make a life' (79%) also sees a significant increase from Spring 2019 (75%), improving closer to Fall 2018 levels (83%).
- Three-quarters (76%) agree that 'Calgary is on the right track to being a better city 10 years from now', statistically increased from Spring 2019 (68%), yet not fully recovering to Fall 2018 levels (84%).
- Eight-in-ten (82%) Calgarians continue to say they do or would feel safe walking alone in their neighborhood after dark (consistent over the past five years).
- In order to improve the quality of life in Calgary, 'government/taxes' is now the top item, including 'reducing taxes' and 'tax spending/City budget'.

KEY FINDINGS

Issue Agenda

“Infrastructure, traffic and roads” continues to dominate the 2019 issue agenda and “budget and spending” has increased in prominence since one year ago.

- Respondents were asked on an unaided (open-ended) basis to identify the most important issue facing their community.
- In Fall 2019, 35% of Calgarians cite “infrastructure, traffic and roads” as an important issue and while this continues to dominate the issue agenda, it is statistically down 5 percentage points from Fall 2018 (40%).
- Ranking second on the issue agenda is “transit” (17%), consistent with Fall 2018 (16%).
- “Crime, safety and policing” follows in third place with 15% of Calgarians citing it as an important issue (consistent with 14% in Fall 2018).
- “Budget and spending” now ranks fourth on the issue agenda (11%), showing a statistically significant increase of 7 percentage points from Fall 2018 (4%).
- “Taxes” are noted as an important issue facing Calgary by 11% of citizens, notably up from 8% in Fall 2018.
- Mentions of the “economy” have also statistically risen from 5% in Fall 2018 to 8% in Fall 2019.
- Next, 8% of Calgarians cite “education”, on par with 7% in Fall 2018, while 7% point to each of “recreation” and to “environment and waste management”, both consistent with Fall 2018.

Overall satisfaction with the level and quality of city services and programs is solid and consistent with Spring 2019, yet remains lower than in Fall 2018.

KEY FINDINGS

Satisfaction with City Services and Programs

- Roughly three-quarters (74%) of Calgarians say they are satisfied with the overall level and quality of services and programs provided by The City, consistent with 73% in Spring 2019, yet remains statistically lower than 77% in Fall 2018.
- The majority of Calgarians are satisfied with each of the 35 services and programs assessed, with satisfaction at 90% or higher for 13 services and programs, and 80% to 89% for another 11 services.
 - The highest satisfaction ratings are for the Calgary Fire Department (98%), 9-1-1 (98%), disaster planning and response (95%), and the quality of drinking water (95%), while the lowest satisfaction ratings are for property tax assessment (64%) and on-street bikeways (60%).
- Statistically significant **increases** from Fall 2018 are seen for satisfaction with snow removal (75%, up 8 percentage points since Fall 2018) and for road maintenance (73%, up 9 percentage points since Fall 2018).
- Statistically significant **decreases** from Fall 2018 are seen for satisfaction with:
 - Property tax assessment (64%, down 13 percentage points since Fall 2018);
 - Downtown revitalization (77%, down 9 percentage points since Fall 2018);
 - City growth management (75%, down 7 percentage points since Fall 2018);
 - On-street bikeways (60%, down 7 percentage points since Fall 2018);
 - City land use planning (79%, down 5 percentage points since Fall 2018);
 - Social services for individuals such as seniors or youth (84%, down 4 percentage points since Fall 2018);
 - City-operated recreation programs (89%, down 4 percentage points since Fall 2018);
 - Community services, such as support for community associations and not-for-profit groups (89%, down 3 percentage points since Fall 2018);
 - City-operated recreation facilities (89%, down 3 percentage points since Fall 2018); and,
 - Business licenses and inspections (88%, down 3 percentage points since Fall 2018).

KEY FINDINGS

Importance vs. Satisfaction Analysis

Primary strengths of The City's services and programs rest with emergency services.

Primary weaknesses are more varied, including tax assessment, affordable housing and services related to roads and transportation.

- When evaluating the level of importance of City services and programs against residents' satisfaction with the services and programs, the analysis identifies primary strengths and weaknesses.
- **Primary Strengths:**
 - Fire Department;
 - Calgary 9-1-1;
 - Quality of drinking water;
 - Calgary Police Service;
 - Parks, playgrounds and open spaces;
 - Disaster planning and response;
 - Calgary's pathway system;
 - Spring road cleaning;
 - 311 service;
 - Garbage collection;
 - Blue Cart recycling;
 - Recreation facilities; and,
 - Community services.
- **Primary Weaknesses:**
 - Property tax assessment;
 - Traffic flow management;
 - Affordable housing;
 - Road maintenance;
 - Snow removal;
 - City growth management;
 - Transportation planning;
 - Land use planning;
 - Calgary Transit;
 - Social services; and,
 - Roads and infrastructure.

KEY FINDINGS

Desired Investment

Affordable housing and social services are 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 (63%, on par with 61% in Fall 2018);
 - Social services for individuals such as seniors or youth (62%, statistically consistent with 60% in Fall 2018);
 - Calgary Transit (56%, significantly down from 61% in Fall 2018);
 - Calgary Police Service (54%, similar to 56% in Fall 2018);
 - Road maintenance, including pothole repairs (54%, notably down from 64% in Fall 2018);
 - Snow removal (52%, statistically down from 64% in Fall 2018); and,
 - Traffic flow management (51%, significantly down from 59% in Fall 2018).
- **Notable increases in desired investment** are seen for:
 - Property tax assessment (27% 'invest more', up 9 percentage points since Fall 2018);
 - City-operated recreation programs (37% 'invest more', up 7 percentage points since Fall 2018);
 - City land use planning (34% 'invest more', up 6 percentage points since Fall 2018);
 - City-operated recreation facilities (42% 'invest more', up 5 percentage points since Fall 2018);
 - City growth management (40% 'invest more', up 5 percentage points since Fall 2018);
 - Downtown revitalization (36% 'invest more', up 5 percentage points since Fall 2018);
 - Community services, such as support for community associations and not-for-profit groups (35% 'invest more', up 5 percentage points since Fall 2018);
 - Business licenses and inspections (24% 'invest more', up 5 percentage points since Fall 2018); and,
 - 311 services (21% 'invest more', up 5 percentage points since Fall 2018).

KEY FINDINGS

Taxation

**The perceived
value of property
tax dollars
experiences
positive
momentum since
Spring 2019, not
yet recovering to
Fall 2018 levels.**

- More than one-half (54%) of Calgarians give The City a 'good value' rating for the value of their property tax dollars, statistically higher than 48% in Spring 2019, yet significantly lower than 59% in Fall 2018.
 - In Calgarians' own words, 'value' related to municipal services is defined as "good quality services" (51%), "appropriate spending" (49%), "good customer service" (12%), accessible and convenient services (10%), the "provision of specific services" (9%), and government "transparency" (3%).
- Calgarians are fairly split with respect to supporting tax increases to maintain or expand services (44%, consistent with 41% in Spring 2019, but notably lower than 52% in Fall 2018) versus supporting service cuts to maintain or reduce taxes (50%, statistically down from 53% in Spring 2019, remaining significantly higher than 43% in Fall 2018).
 - For the first time in Fall survey tracking, a preference for service cuts over tax increases emerges.
- Just over one-half (57%) of Calgarians report being knowledgeable about how tax dollars are spent, identical to Spring 2019, yet remaining statistically lower than 60% in Fall 2018.
- Interest in knowing how property tax dollars are invested remains strong.
 - In Fall 2019, 94% agree that they are 'interested in knowing how their property tax dollars are invested in various City services', on par with 93% in Spring 2019 and identical to 94% in Fall 2018.
 - Further, 55% agree 'The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services', similar to 52% in Spring 2019 and significantly lower than 60% in Fall 2018.



Perceptions about The City's **customer service delivery remain positive, seeing certain declines since Fall 2018.**

Overall satisfaction with the **quality of City information and communications remains strong but has declined from Fall 2018, while perceptions of having access to the 'right' amount of information remains stable.**

KEY FINDINGS

Customer Service and Communications

- Slightly more than six-in-ten (62%) Calgarians have contacted The City of Calgary within the past 12 months, significantly up from 53% in Spring 2019, yet consistent with 65% in Fall 2018.
- Among those who contacted or dealt with The City in the past 12 months, 74% are satisfied with the overall level and quality of customer service provided by The City of Calgary, statistically down from 78% in Fall 2018.
- Ratings for the 'quality of customer service from The City is consistently high' (81%) have increased since Spring 2019 (77%), similar to levels in Fall 2018 (83%). Ratings have also increased for citizens feeling that 'The City of Calgary makes customer service a priority' (79%, statistically up from 75% in Spring 2019, yet remaining slightly lower than 82% in Fall 2018).
- Among those who contacted or dealt with The City in the past 12 months, 65% have contacted The City via phone.
 - In addition, 24% contacted The City using the Internet (using The City's website, using the 311 website or using the 311 App), and 6% contacted The City by visiting a City office or facility.
- In Fall 2019, 75% of Calgarians are satisfied with the overall quality of City information and communications (statistically down 5 percentage points from 80% in Fall 2018).
- Currently, 54% of Calgarians say they have access to 'just the right amount' of information from The City (statistically on par with 57% in Fall 2018), while 44% say they have access to 'too little' information (a significant 3 percentage point increase from 41% in Fall 2018).
- More than seven-in-ten (72%) Calgarians report that The City communicates well with citizens about its services, programs, policies and plans, similar to 71% in Spring 2019 (not asked in Fall 2018).

KEY FINDINGS

City Reputation and Performance

Results highlight an overall weakening of The City's **reputation**, with both favourability, trust, and advocacy realizing significant decreases since last year.

Satisfaction with **City Council's performance** has decreased over the past year, and declines in perceptions of municipal government **transparency** and opportunities for **citizen input** emerge in Fall 2019.

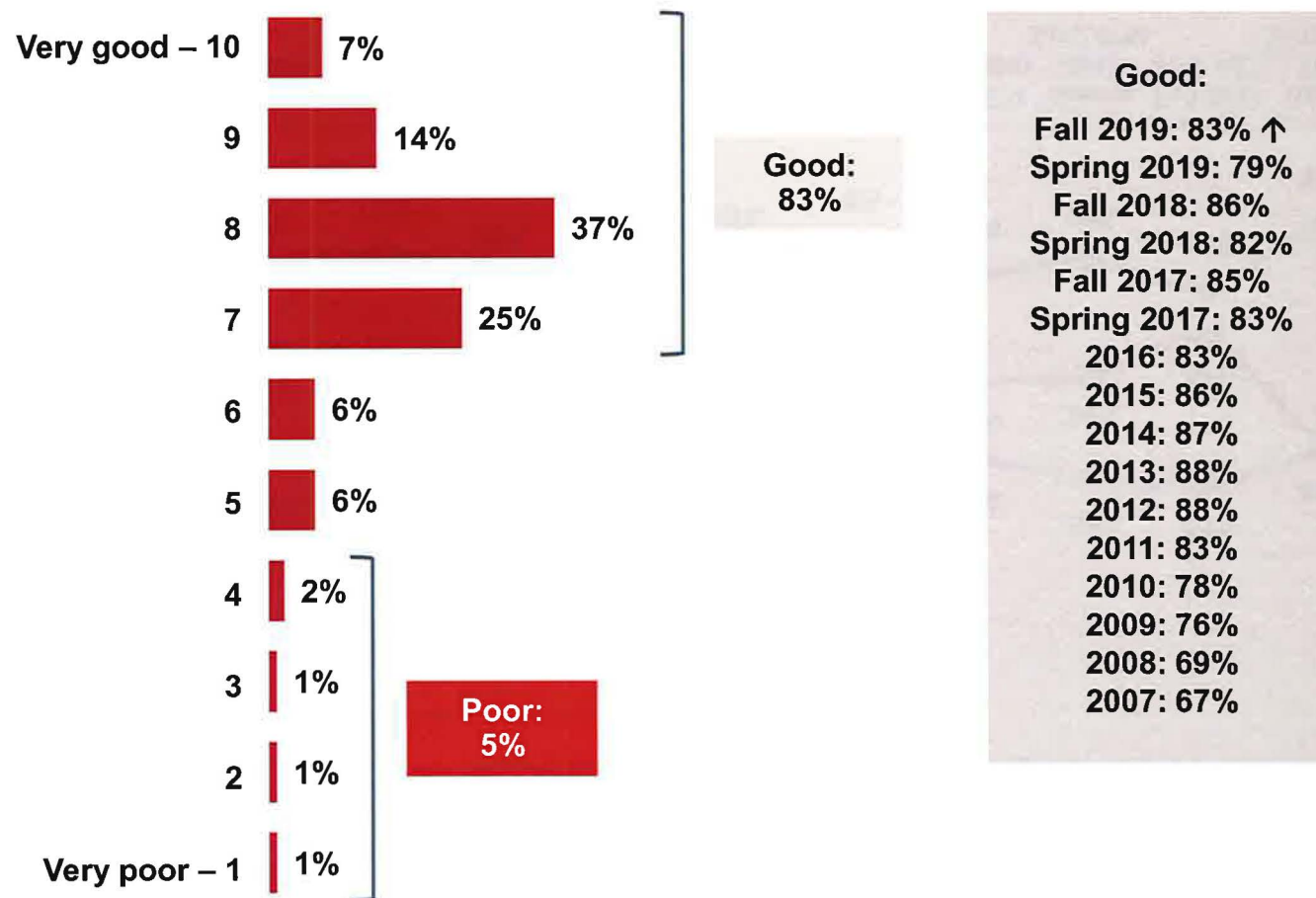
- One-half (50%) Calgarians have a favourable impression of The City, identical to Spring 2019 (50%), yet significantly lower than 68% in Fall 2018.
- While overall trust (52%) is identical with Spring 2019 (52%), trust ratings remain notably lower than 60% in Fall 2018.
 - Distrust (23%) of The City remains consistent with Spring 2019 (24%) and is statistically higher than 14% in Fall 2018.
- One-quarter (24%) of Calgarians are advocates of The City, significantly down 10 percentage points since Fall 2018 (34%), while 19% are critics, up 7 percentage points since Fall 2018 (12%).
- Seven-in-ten citizens (70%) are satisfied with the way Council and Administration are running The City, showing a notable decrease since Fall 2018 (79%).
 - Almost eight-in-ten (79%) citizens are satisfied with City Administration's performance (down significantly by 5 percentage points from Fall 2018) which drops to 55% for City Council (statistically down 15 percentage points from Fall 2018).
 - Two-thirds (66%) of Calgarians believe that 'City Council and City Administration work collaboratively to make the best possible decisions for the future of Calgary', significantly down 8 percentage points since Fall 2018 (74%).
- While 71% of Calgarians agree that 'The City of Calgary practices open and accessible government, this has statistically declined 7 percentage points since Fall 2018. Declines also emerge for citizens agreeing that 'The City allows citizens to have meaningful input into decision-making' (60%, notably down 7 percentage points from Fall 2018), and 'The City uses input from Calgarians in decision-making about City projects and services (65%, statistically down from 70% in Fall 2018).



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?

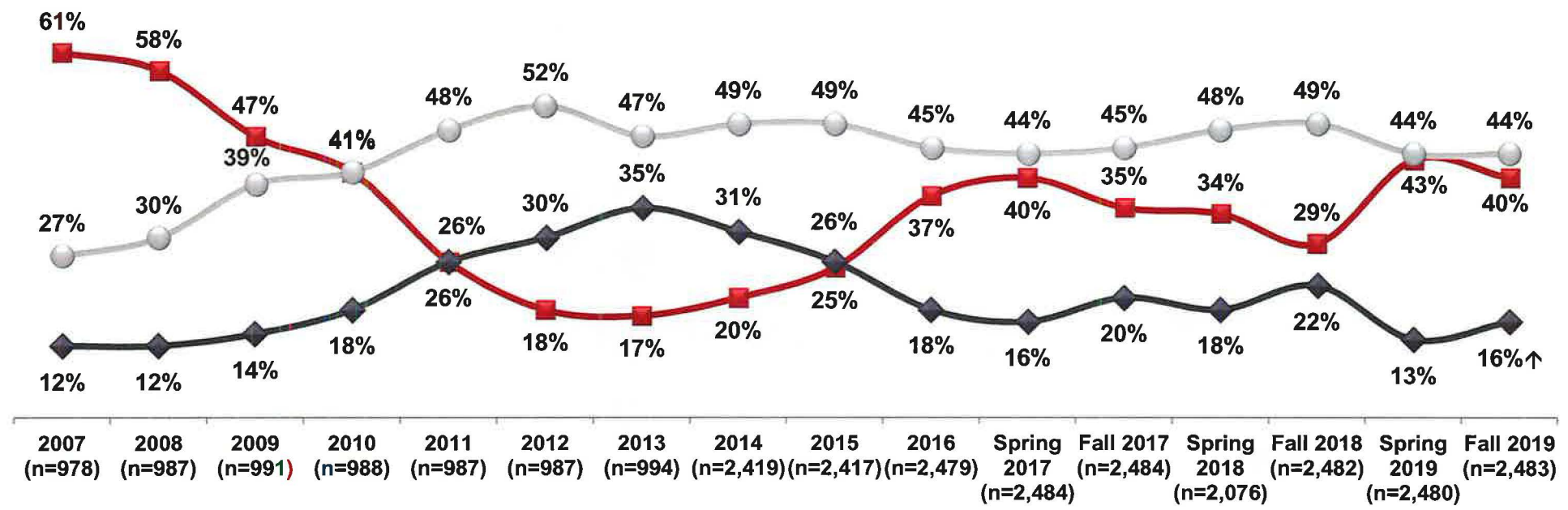
Base: Valid respondents (n=2,498)

↑ Statistically higher than Spring 2019

↓ Statistically lower than Spring 2019



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

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

Actions to Improve the Quality of Life

Multiple Responses

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

% Change
Fall 2018 – Fall 2019

Government [NET]	26%	+7↑
Reduce taxes	9%	+1
Tax spending/ City budget	9%	+4↑
Transportation [NET]	22%	-5↓
Improvement/ maintenance of existing roads	6%	-4↓
Better traffic management	4%	-2↓
Homelessness, Poverty and Affordable Housing	17%	-3↓
Improve job creation/ employment	8%	-1
Expand affordable housing/ rent	3%	-1
Recreation and Community Services [NET]	15%	-6↓
Building of community centres/ recreation facilities	4%	-
Parks/ green space improvement	3%	-1
Availability of (free) programs/ activities/ services	3%	-1
Engage in community events/ activities	2%	-2↓
Transit [NET]	12%	-3↓
Improve public transportation (unspecified)	6%	-4↓
More access to buses/ transit/ trains	3%	-2↓
Crime, Safety and Policing [NET]	7%	-4↓
Control crime and safety	3%	-2↓
More policing/ patrolling	3%	-2↓
Health [NET]	3%	-1
Environment [NET]	3%	-1
Education [NET]	3%	-
Growth & Planning [NET]	2%	-1
Nothing	16%	-1

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=2,331)

↑ Statistically higher than Fall 2018

↓ Statistically lower than Fall 2018

NET mentions of <2% are not shown

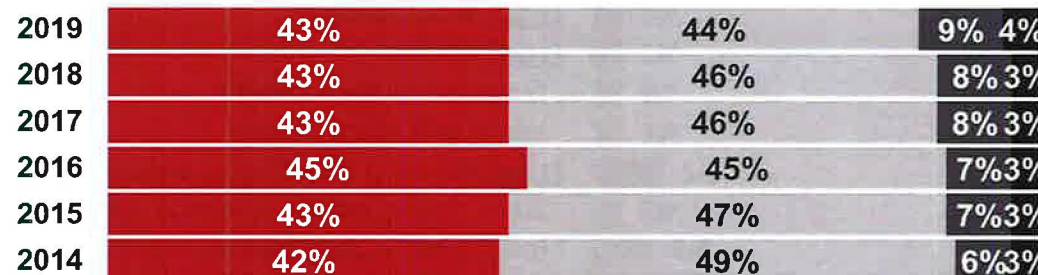


Sustainability: Connectedness

% Agree

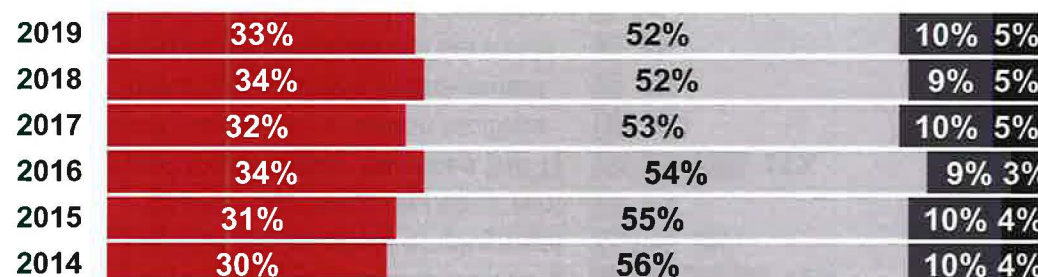
■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

I am proud to be a
Calgarian



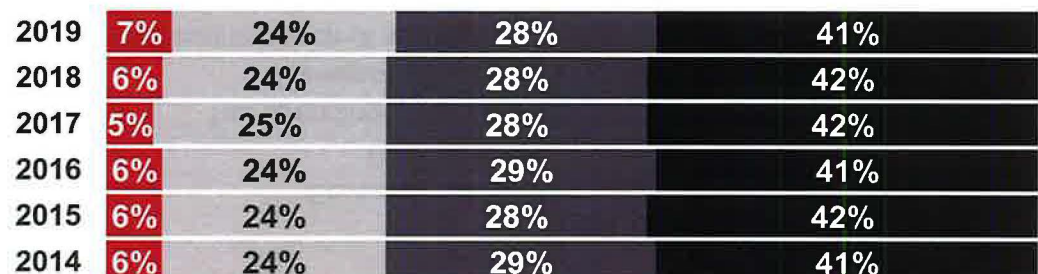
87%
89%
89%
90%
90%
91%

I am proud to live in my
neighbourhood



85%
86%
85%
88%
86%
86%

I am regularly involved in
neighbourhood and local
community events



31%
30%
30%
30%
30%
30%

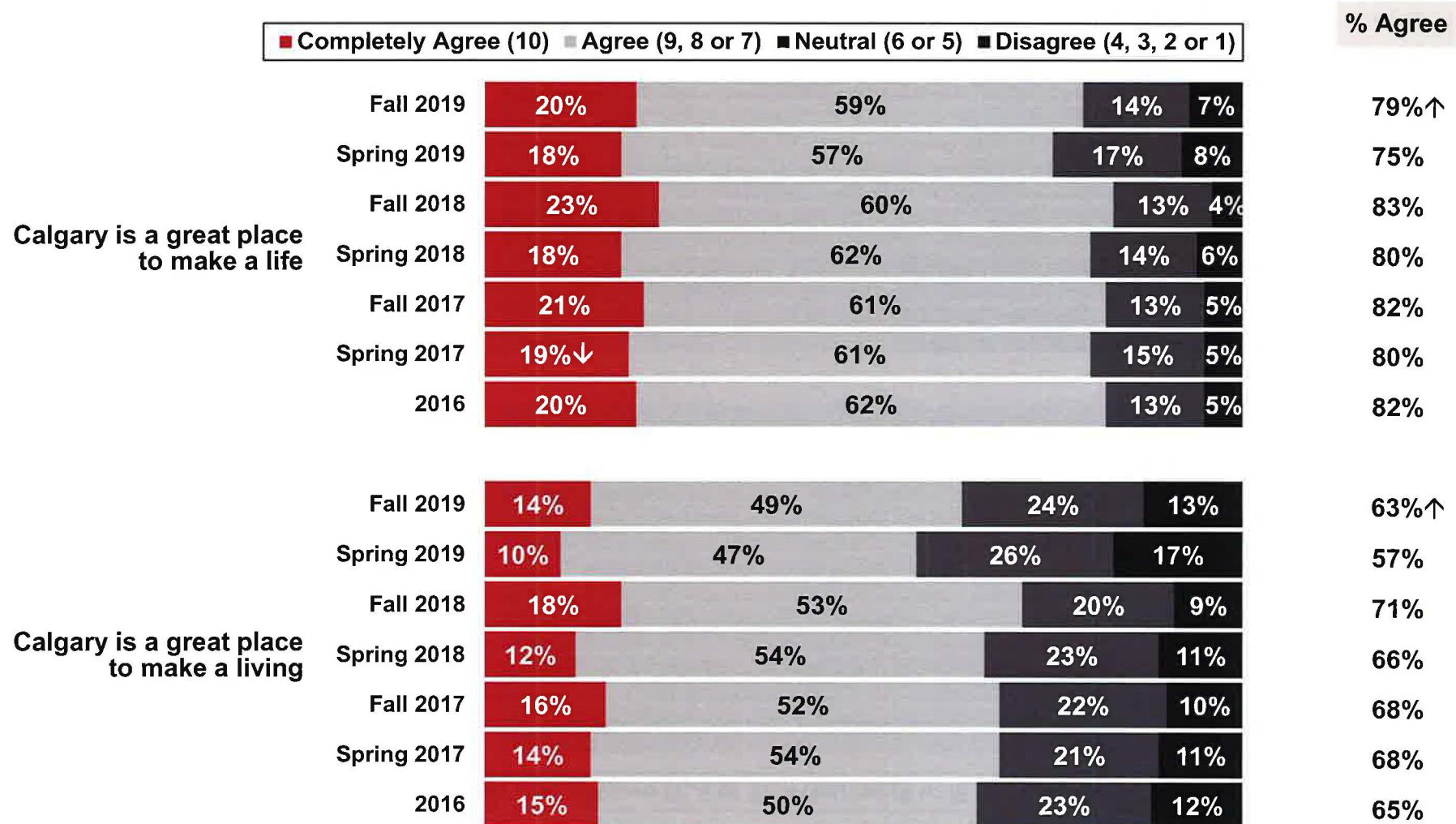
Next, I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree."

Base: Valid respondents (Bases vary)

All waves conducted in the Fall



Sustainability: Making a Life and Making a Living



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)

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

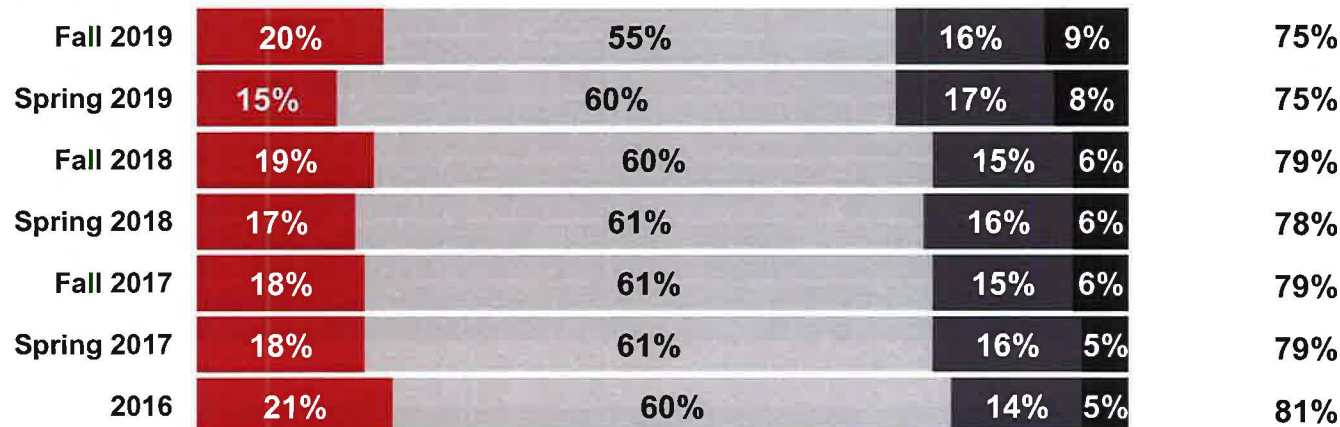


Sustainability: Inclusivity and Direction for the Future

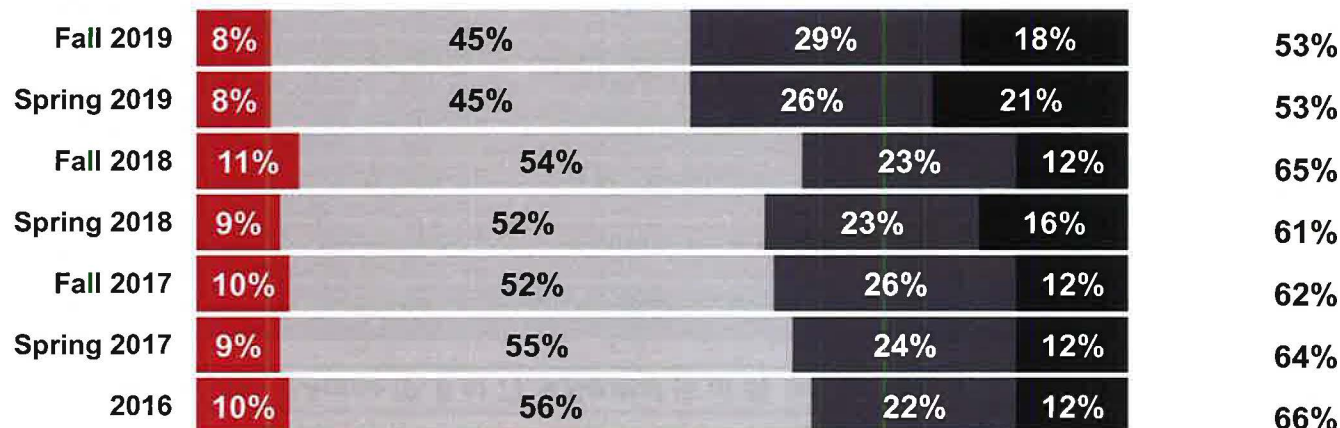
The City of Calgary municipal government fosters a city that is inclusive and accepting of all

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

% Agree



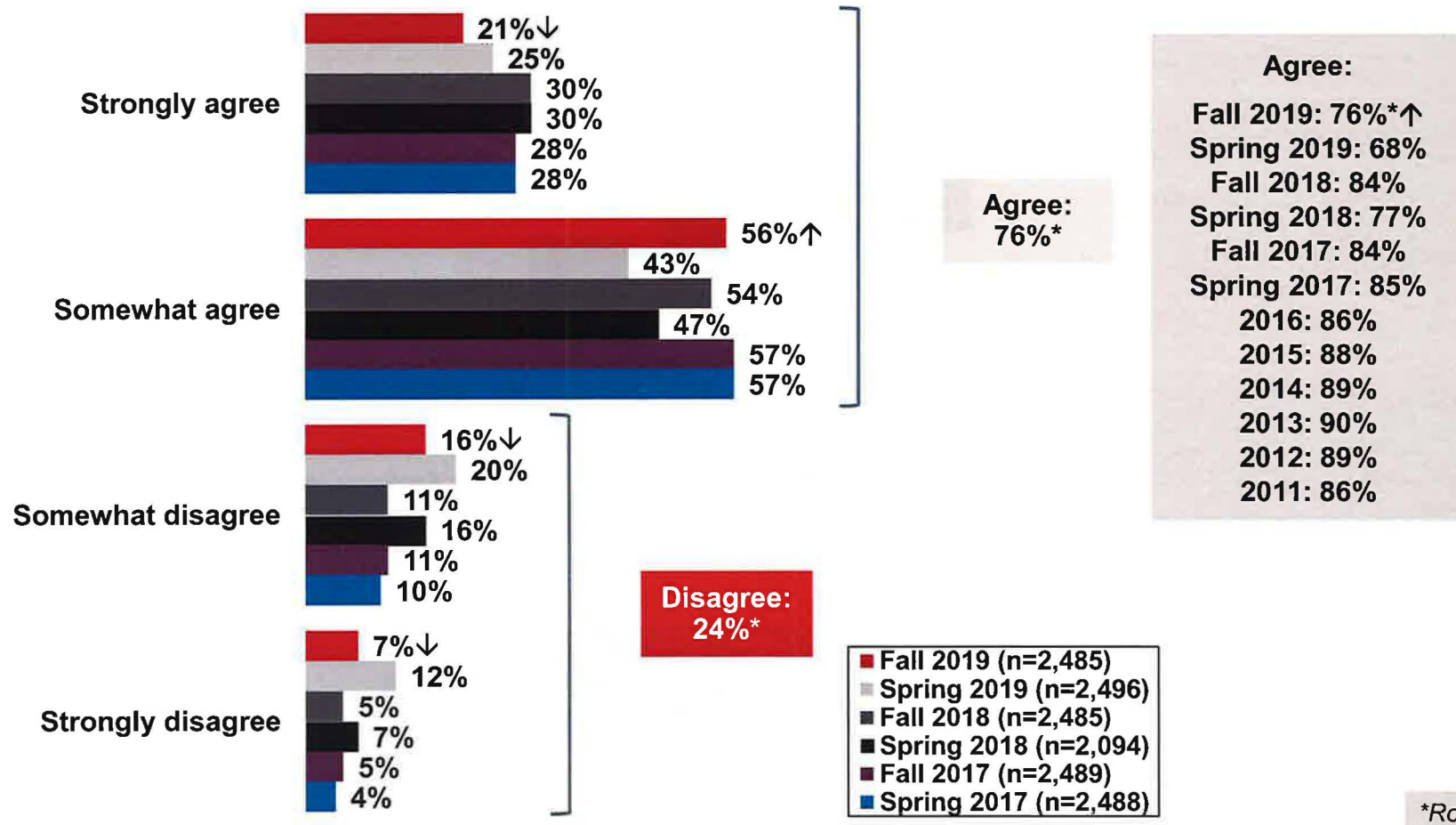
Calgary is moving in the right direction to ensure a high quality of life for future generations



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?



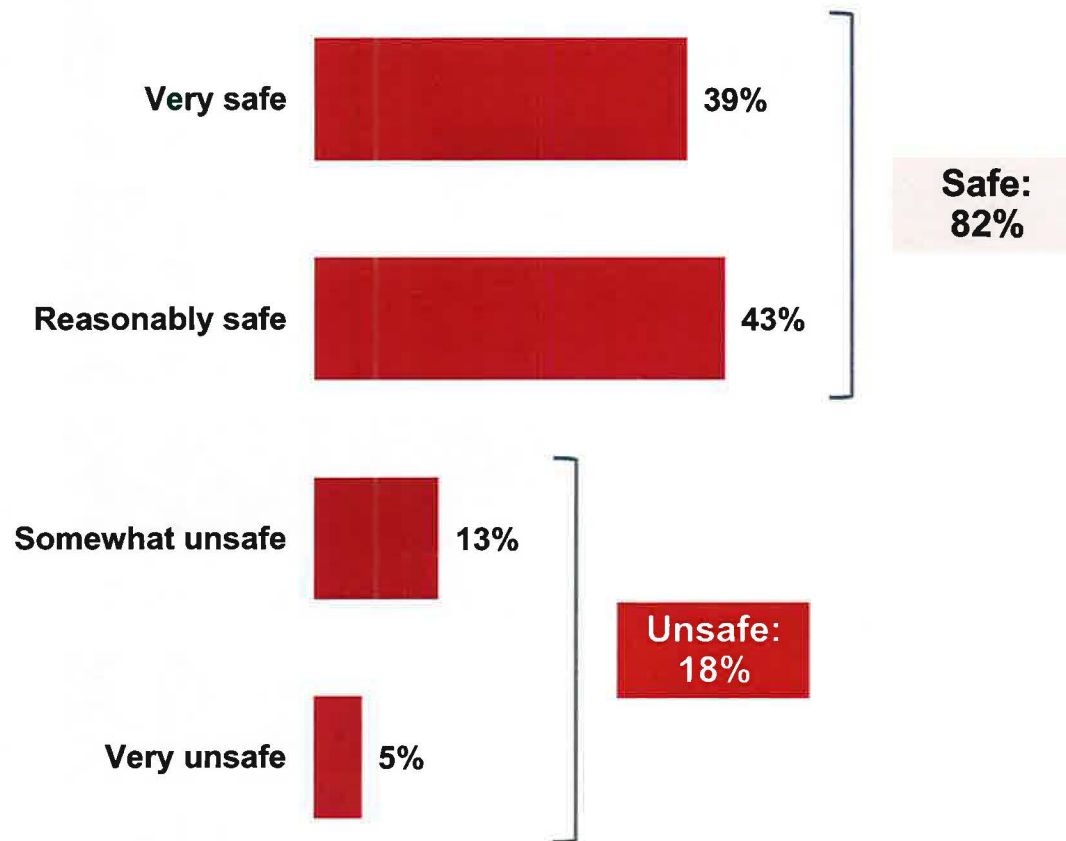
↑Statistically higher than Spring 2019
↓Statistically lower than Spring 2019

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



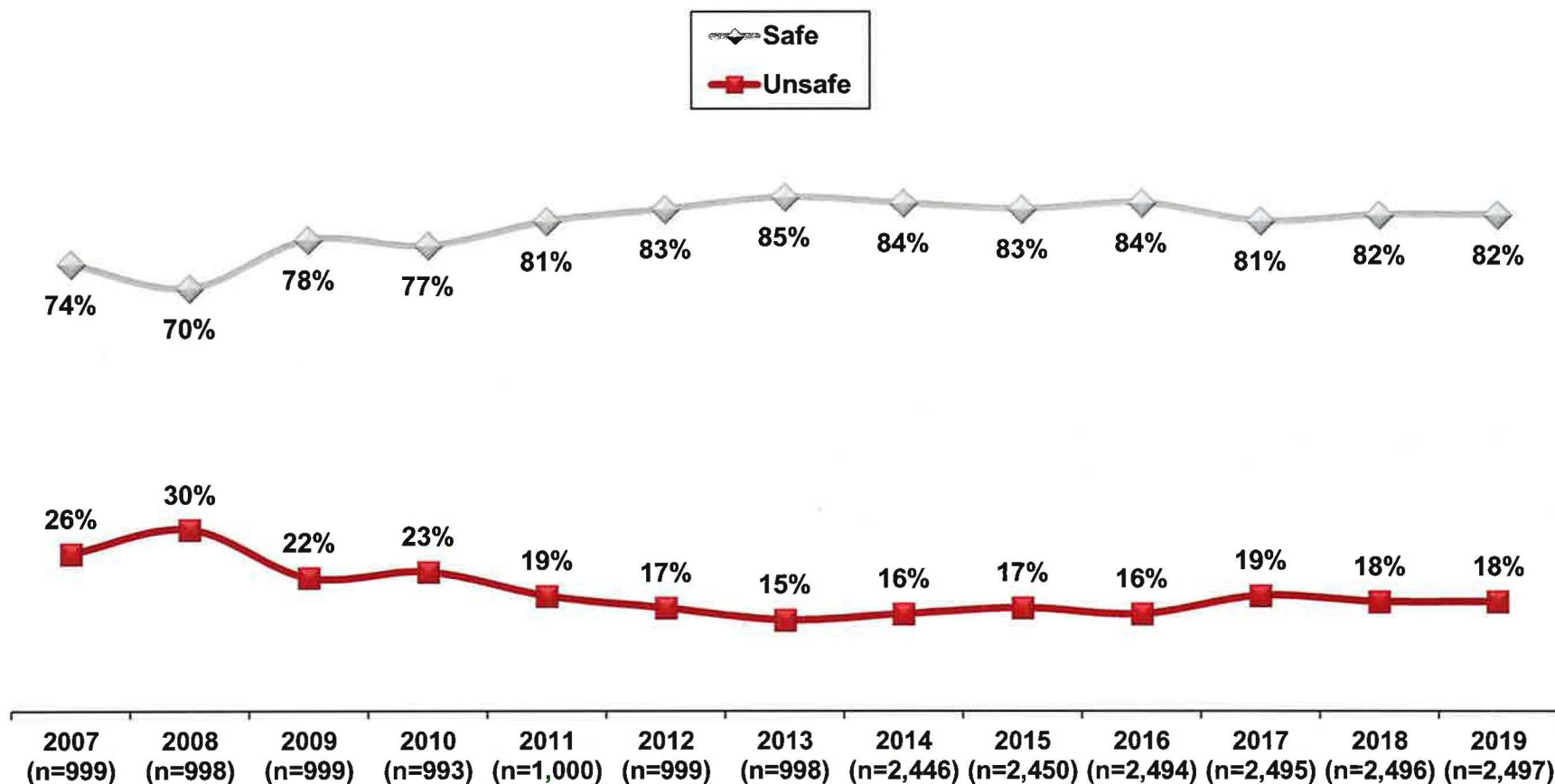
Perceived Safety in Own Neighbourhood



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

Base: Valid respondents (n=2,497)

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

All waves conducted in the Fall



Issue Agenda





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
Infrastructure, Traffic & Roads [NET]	24%	11%	35%
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
Transit [NET]	12%	5%	17%
Public Transportation (incl. buses/ C-train/ poor service)	6%	8%	+1
Transportation (unspecified)	4%	6%	-3↓
Transit system improvements	4%	6%	+6↑
Crime, Safety & Policing [NET]	10%	5%	15%
Breaking and entering/gangs/drugs	6%	9%	+2
Public safety	4%	6%	+1
Budget & Spending [NET]	8%	11%	+7↑
Taxes [NET]	8%	11%	+3↑
Economy [NET]	6%	8%	+3↑
Education	5%	8%	+1
Recreation [NET]	4%	7%	-2
Environment and Waste Management [NET]	4%	7%	-
Growth and Planning [NET]	5%	5%	+1
Homelessness, Poverty & Affordable Housing [NET]	4%	4%	-1
Healthcare	4%	4%	+2↑
None	11%	11%	-5↓

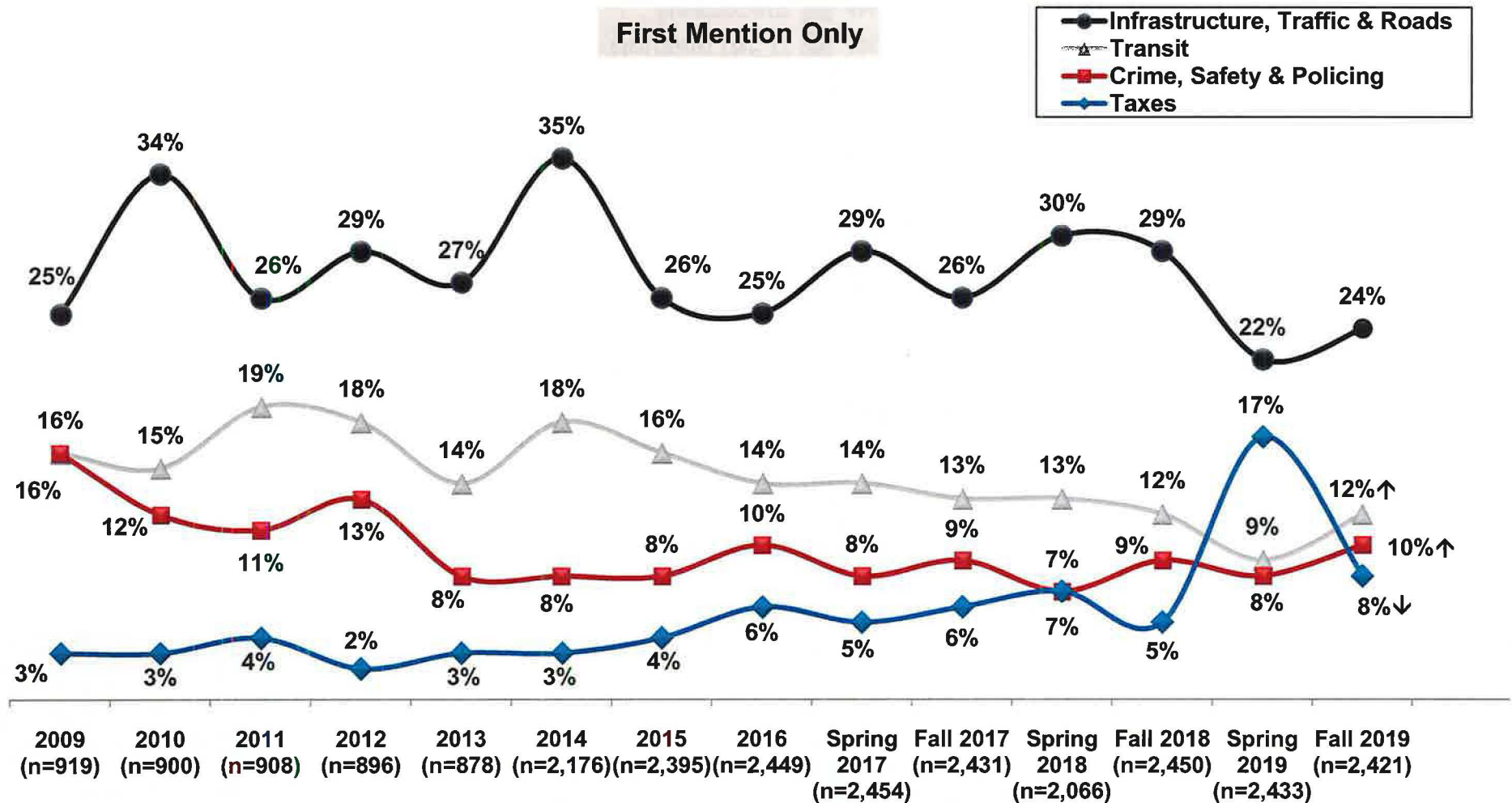
In your view, as a resident of the city of Calgary, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders? Are there any other important local issues?

Base: Valid respondents (n=2,422)

NET mentions of
<4% are not shown

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

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

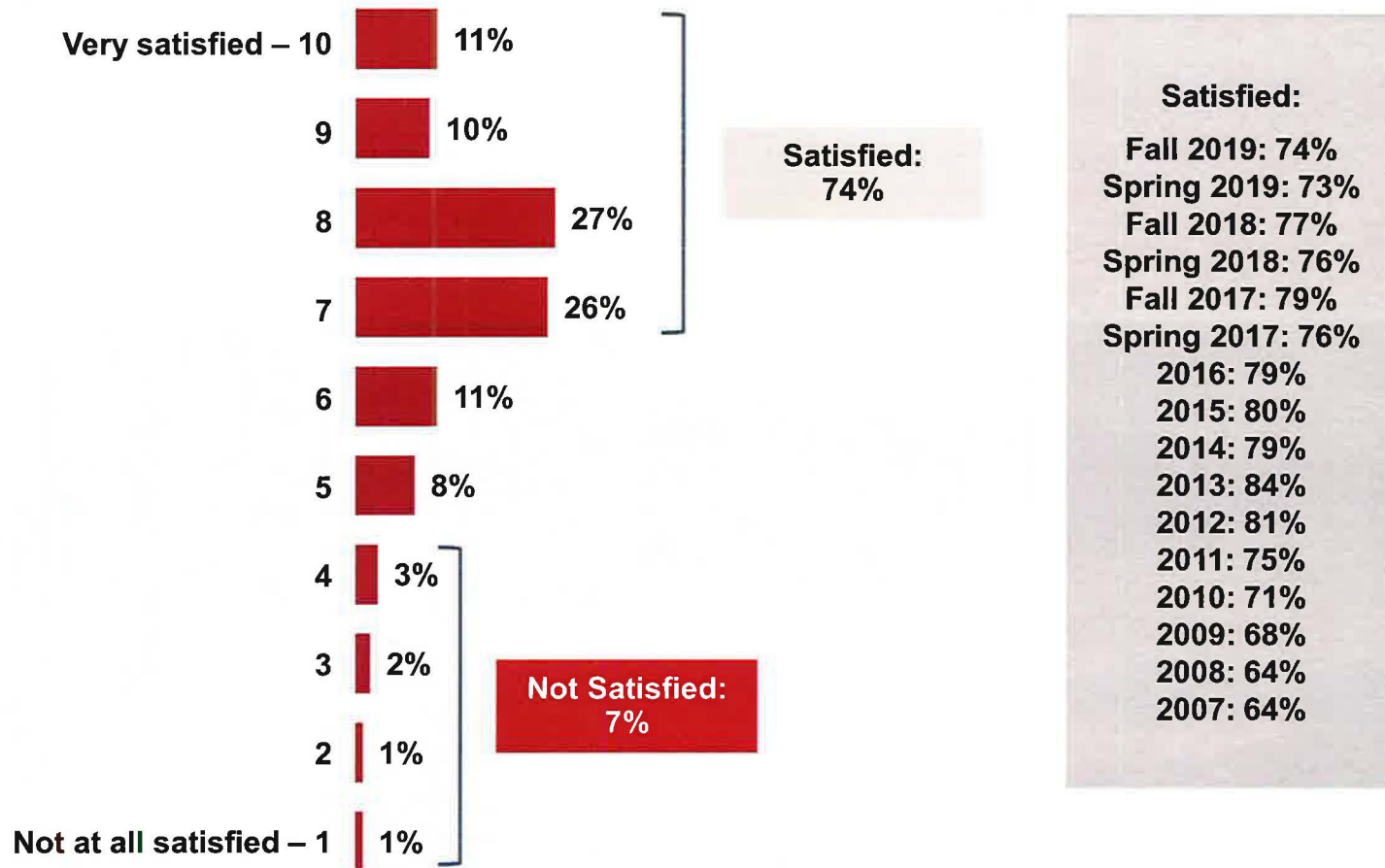


City Programs and Services





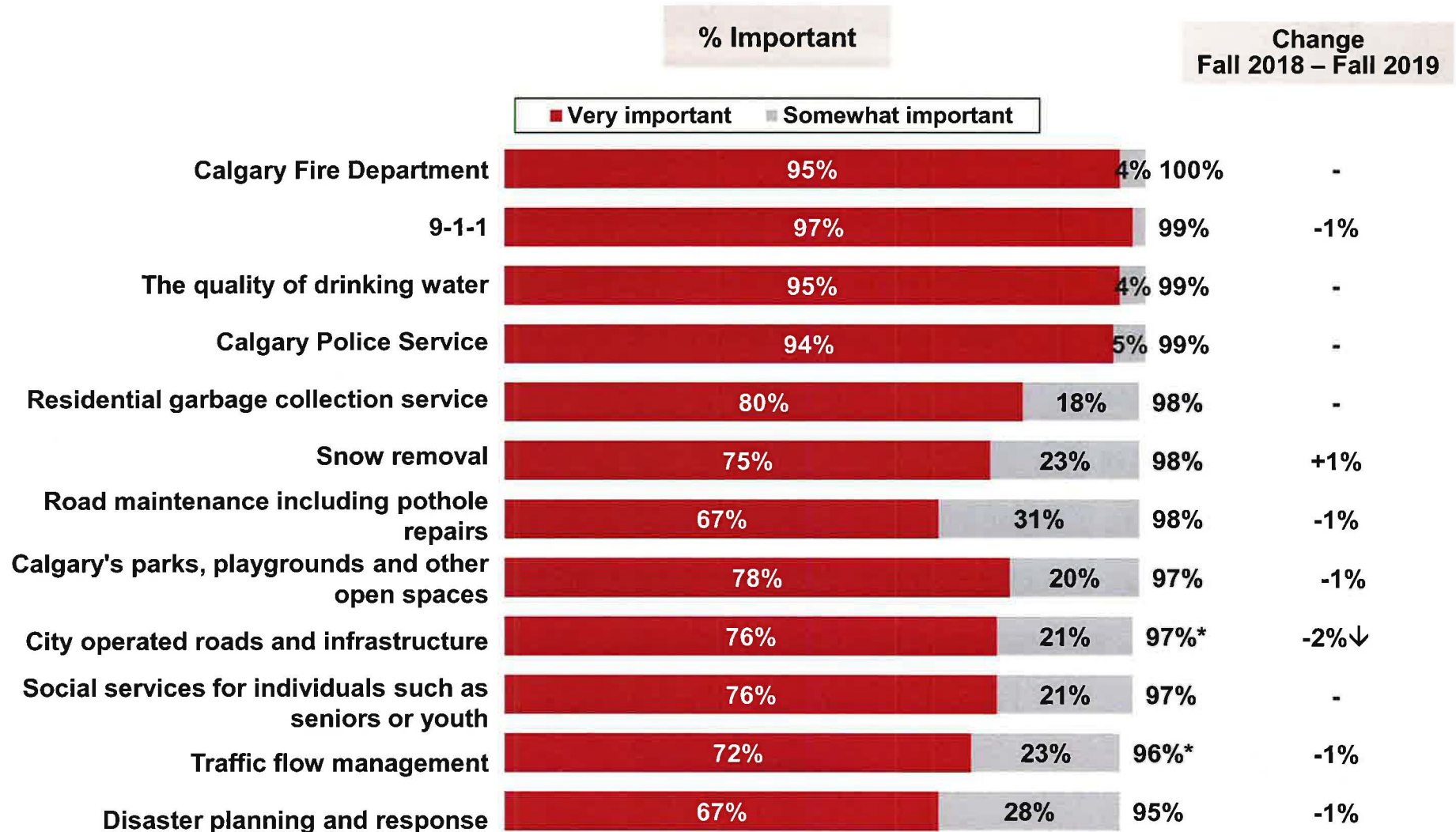
Satisfaction with the Overall Level and Quality of City Services and Programs



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 (n=2,487)

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)

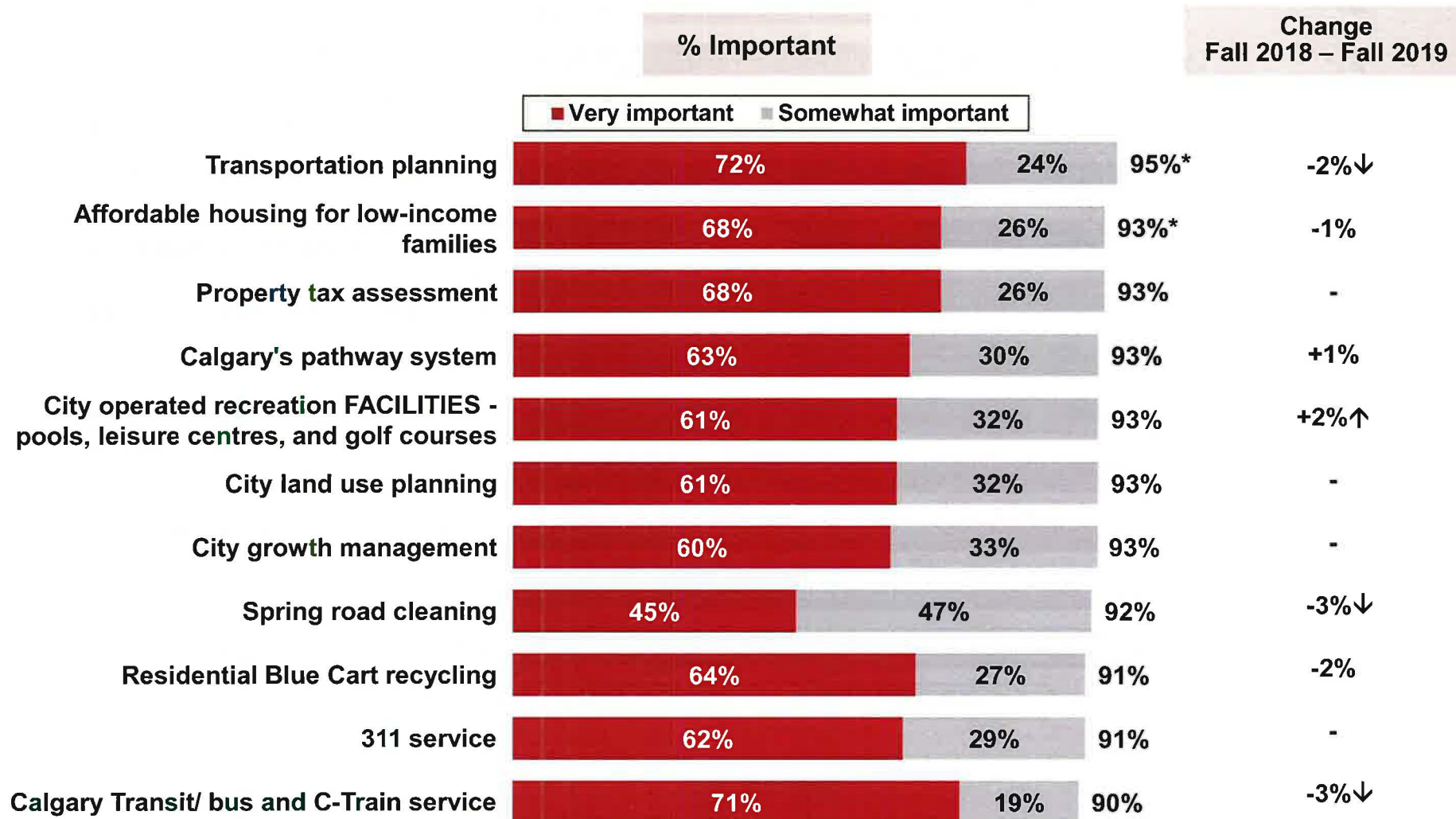
*Rounding

↑ Statistically higher than Fall 2018

↓ Statistically lower than Fall 2018



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.

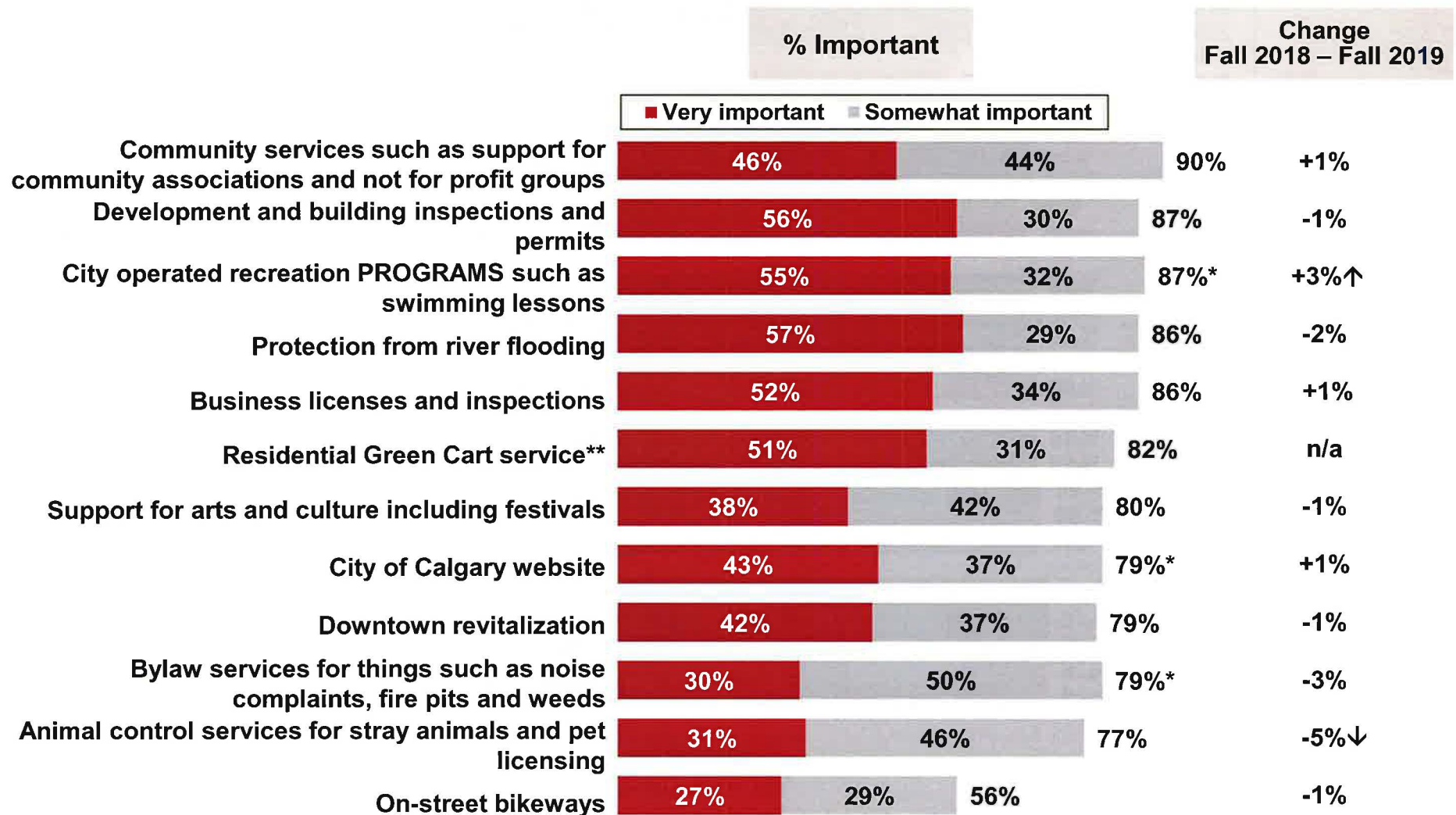
Base: Valid respondents (Bases vary)

*Rounding

↑ Statistically higher than Fall 2018

↓ Statistically lower than Fall 2018

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) | **New item in Fall 2019

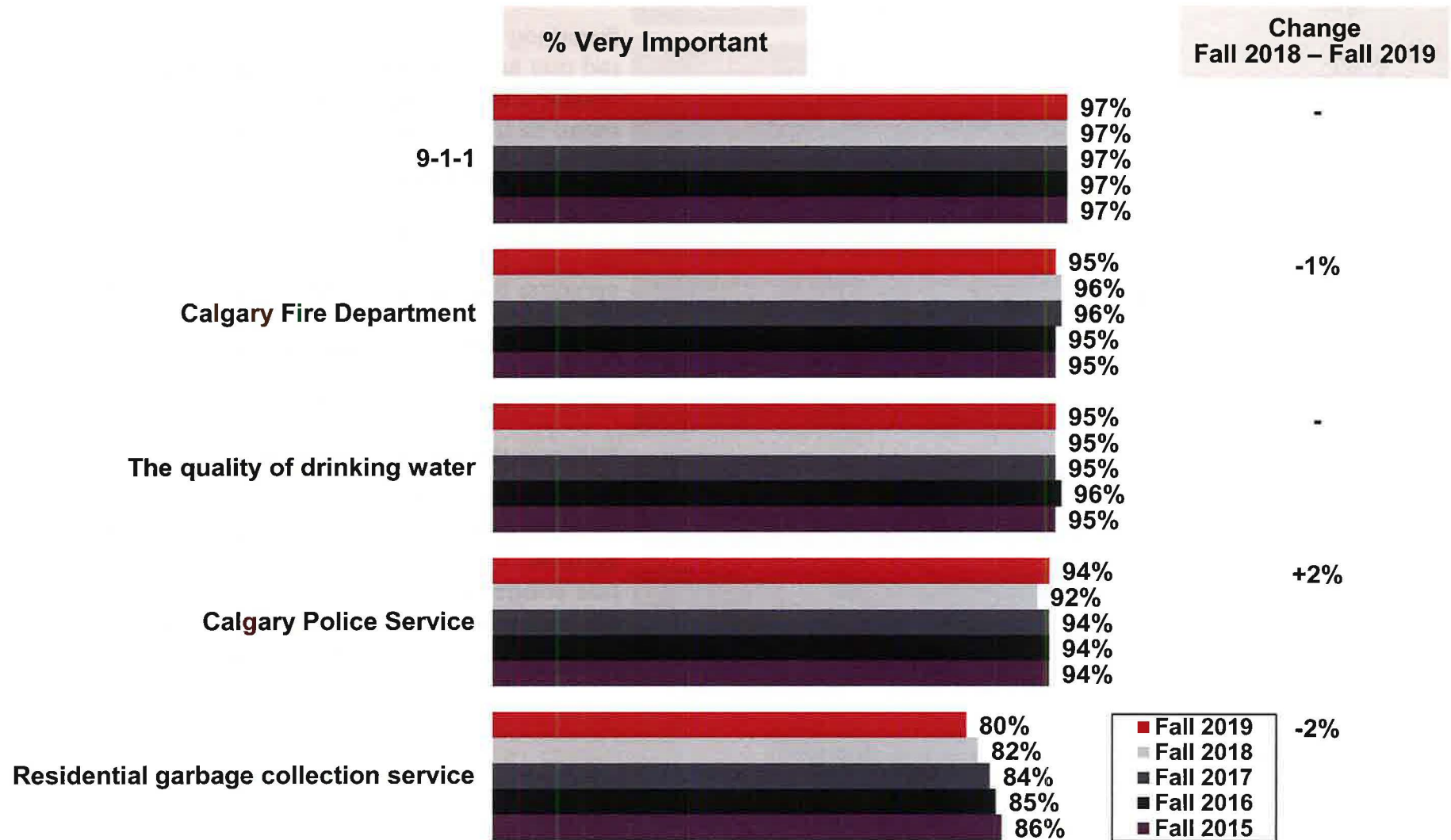
*Rounding

↑ Statistically higher than Fall 2018

↓ Statistically lower than Fall 2018



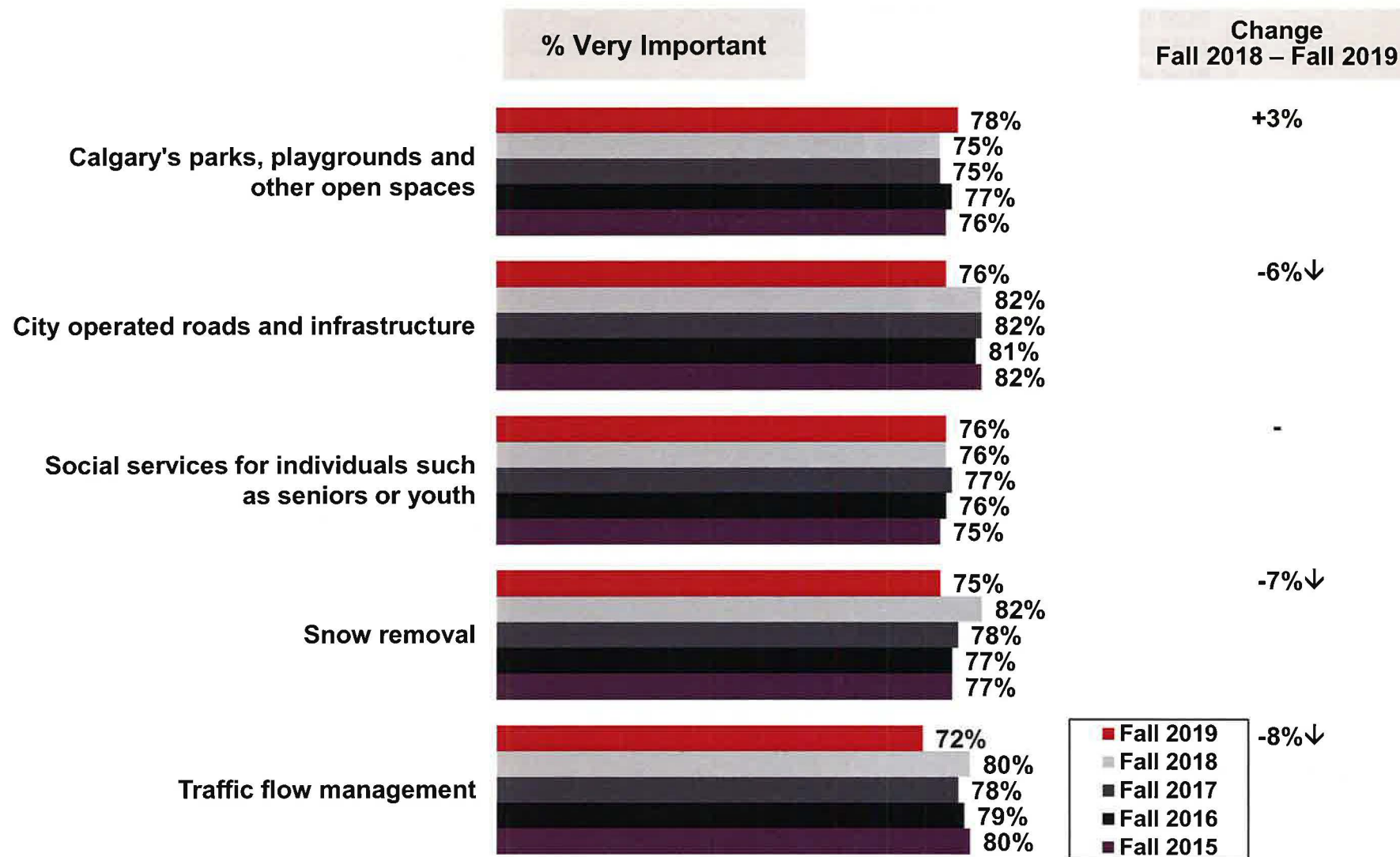
Tracking Importance of City Programs and Services



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)

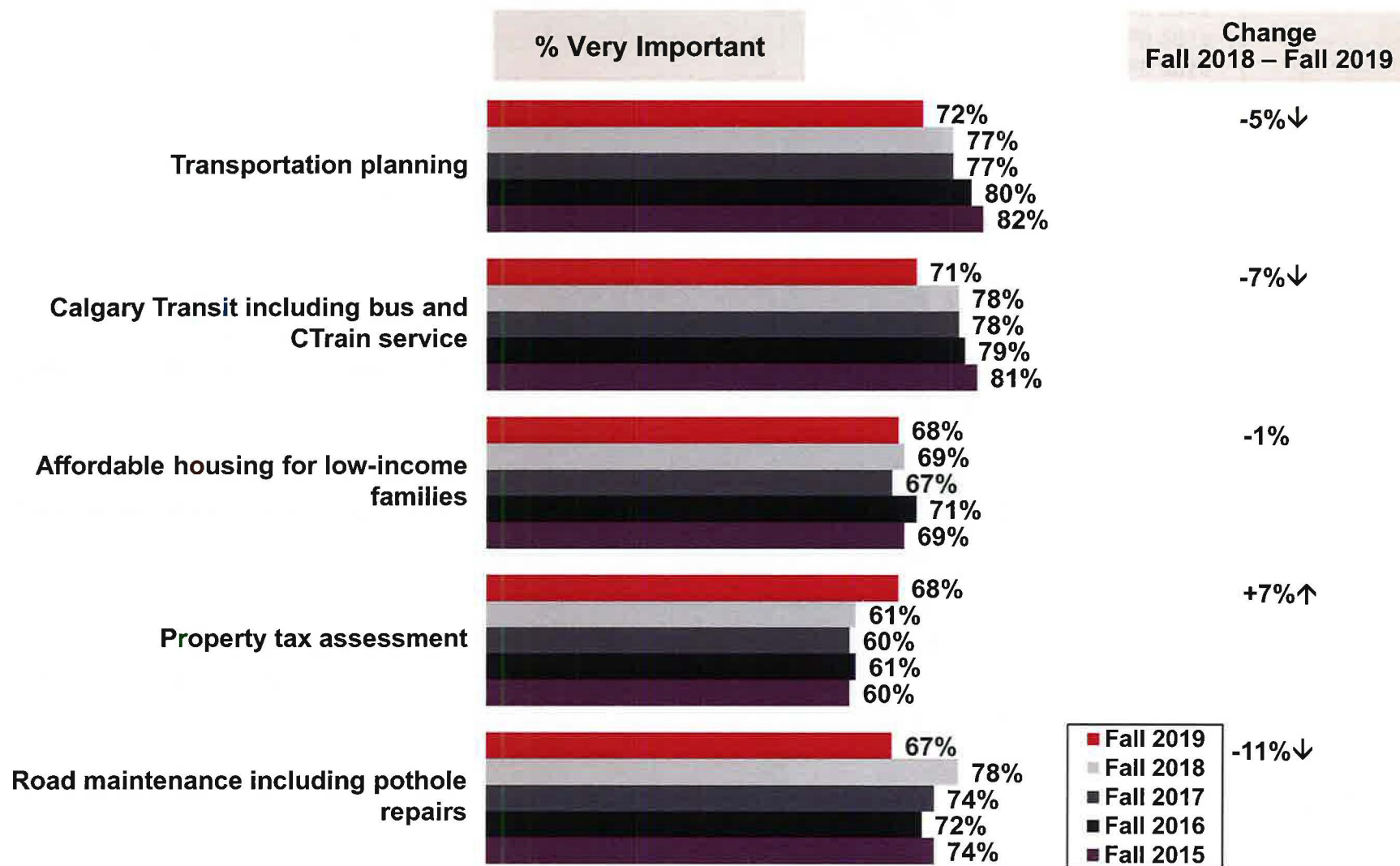


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)

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

Tracking Importance of City Programs and Services (continued)

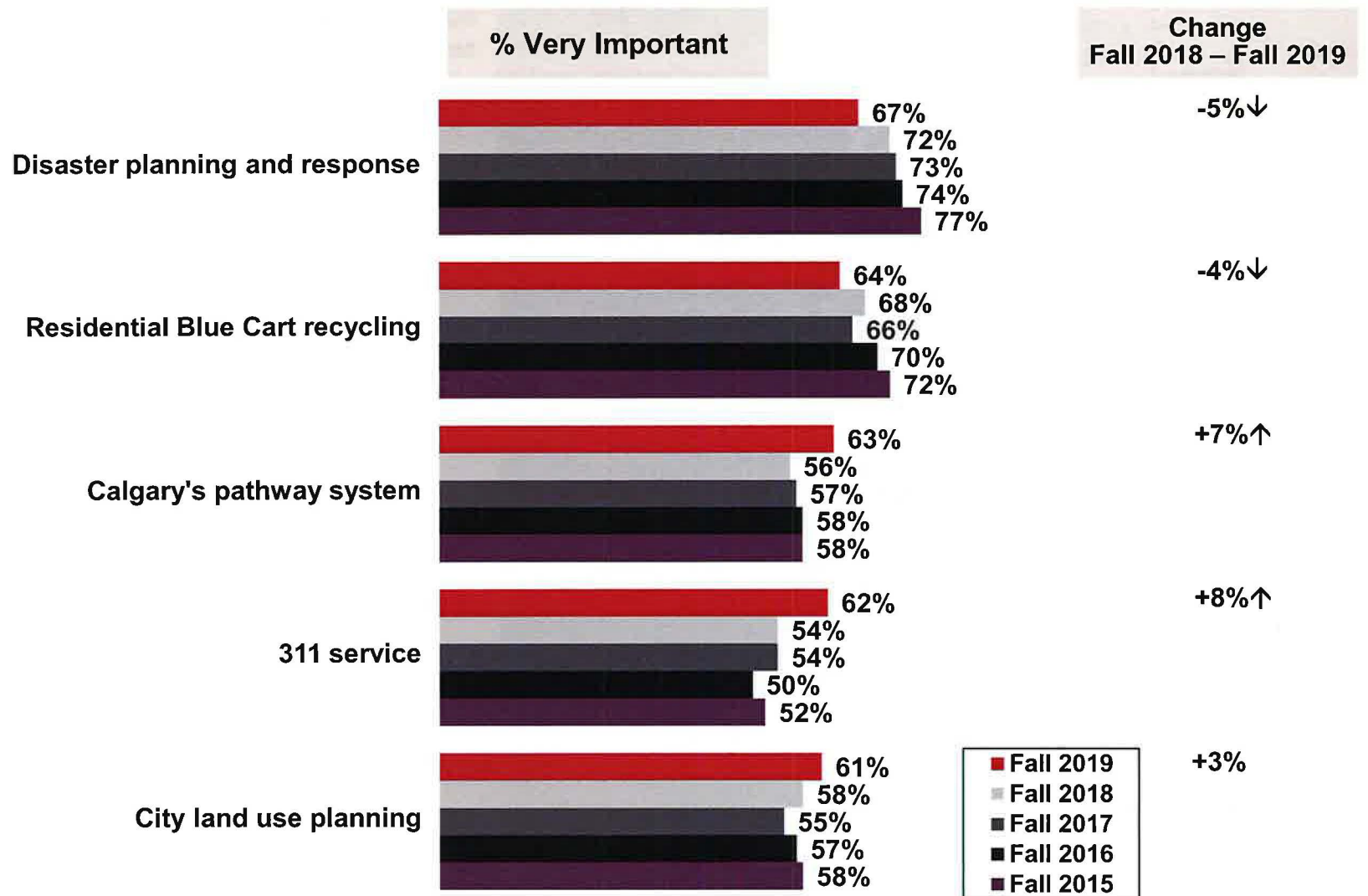


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)

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

Tracking Importance of City Programs and Services (continued)

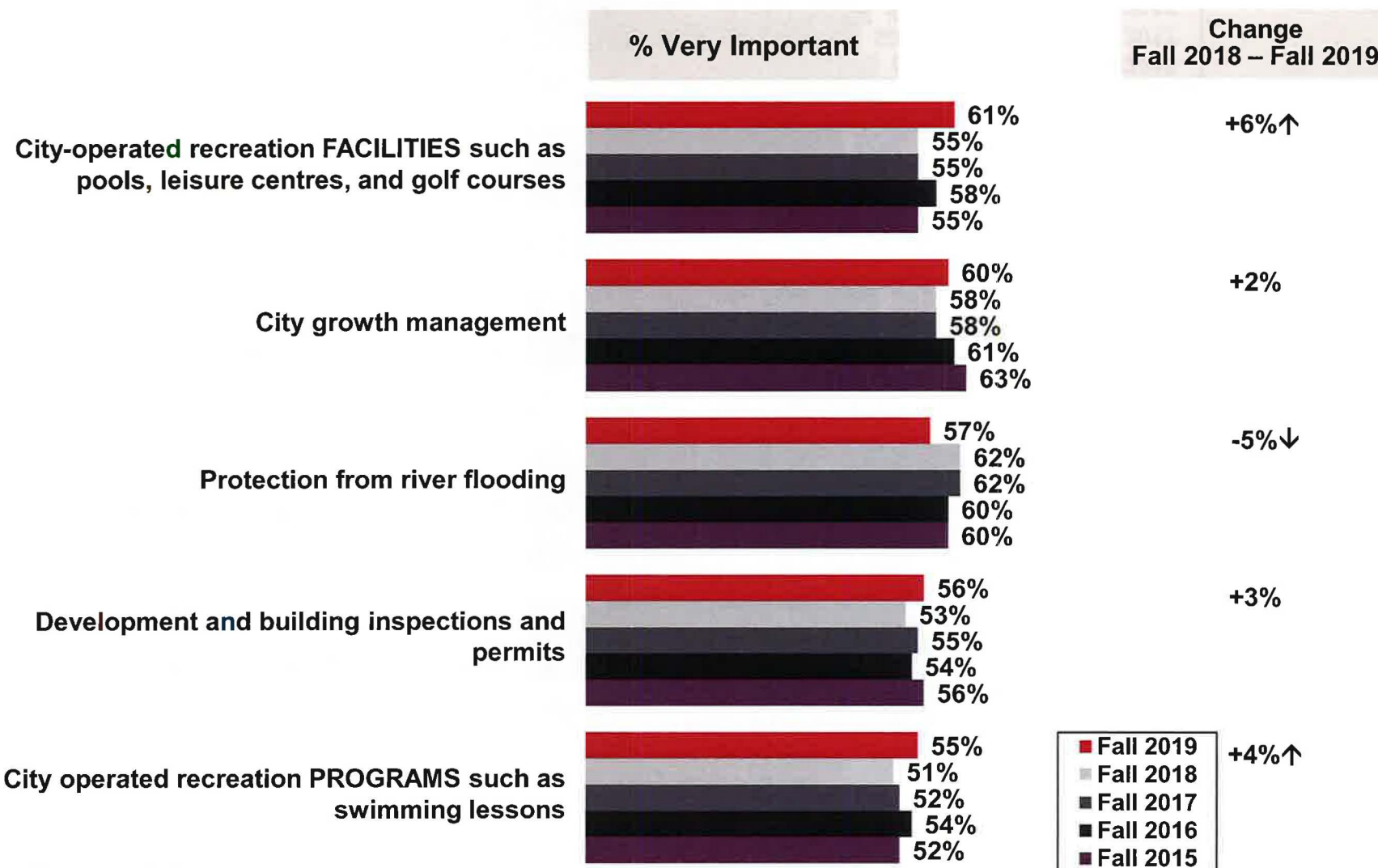


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)

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

Tracking Importance of City Programs and Services (continued)

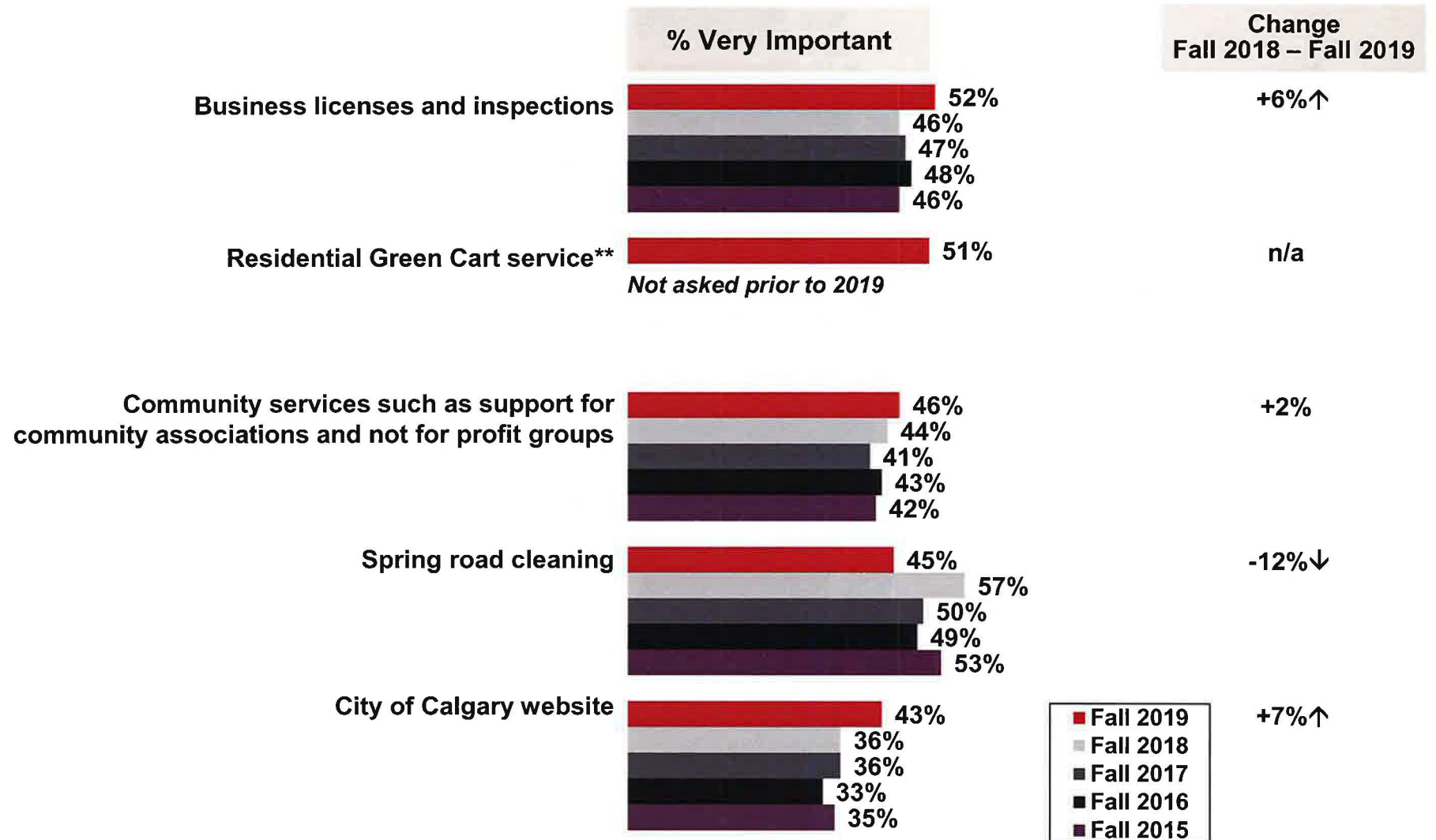


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)

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

Tracking Importance of City Programs and Services (continued)



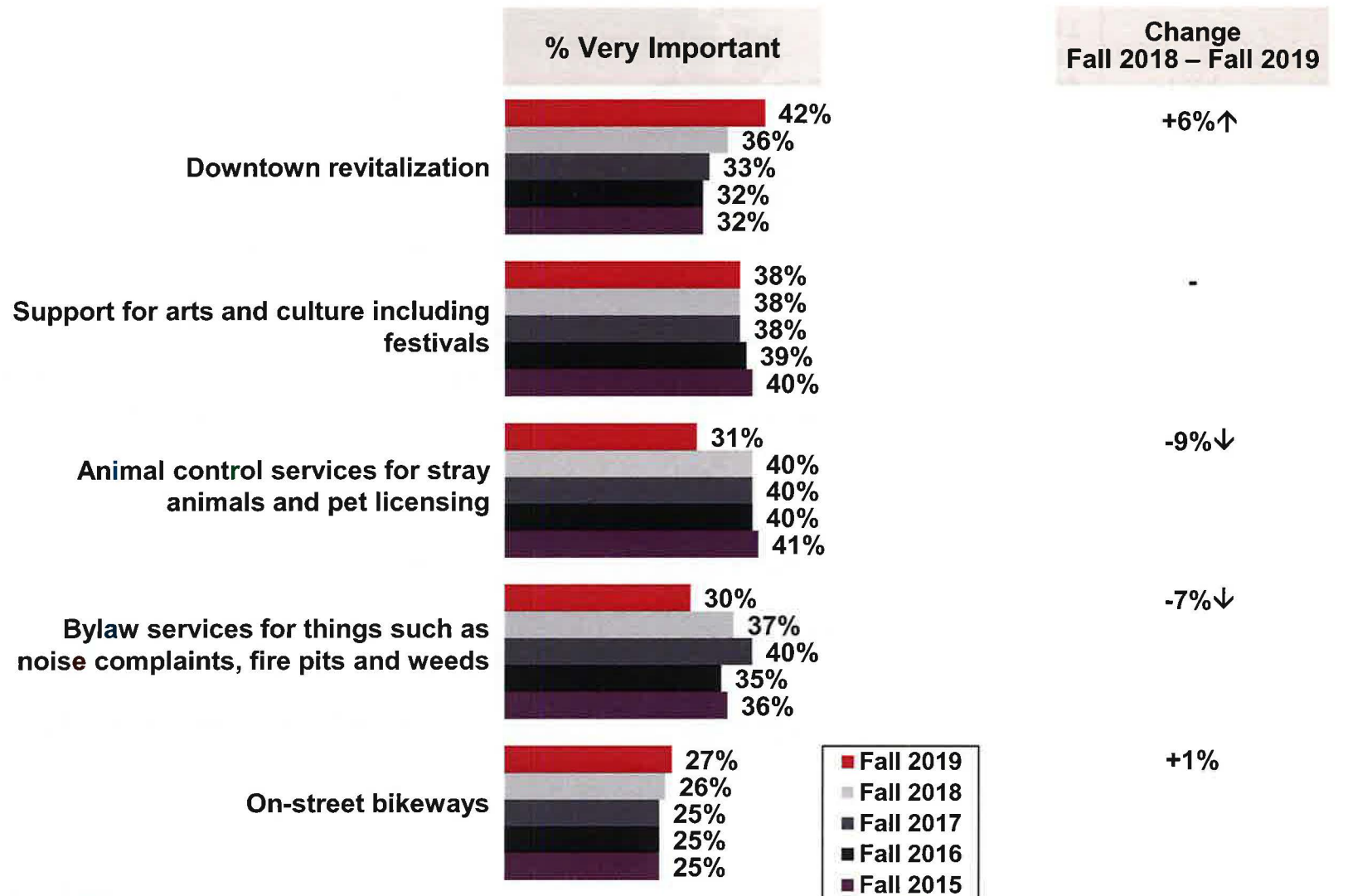
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary) | **New item in Fall 2019

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



Tracking Importance of City Programs and Services (continued)

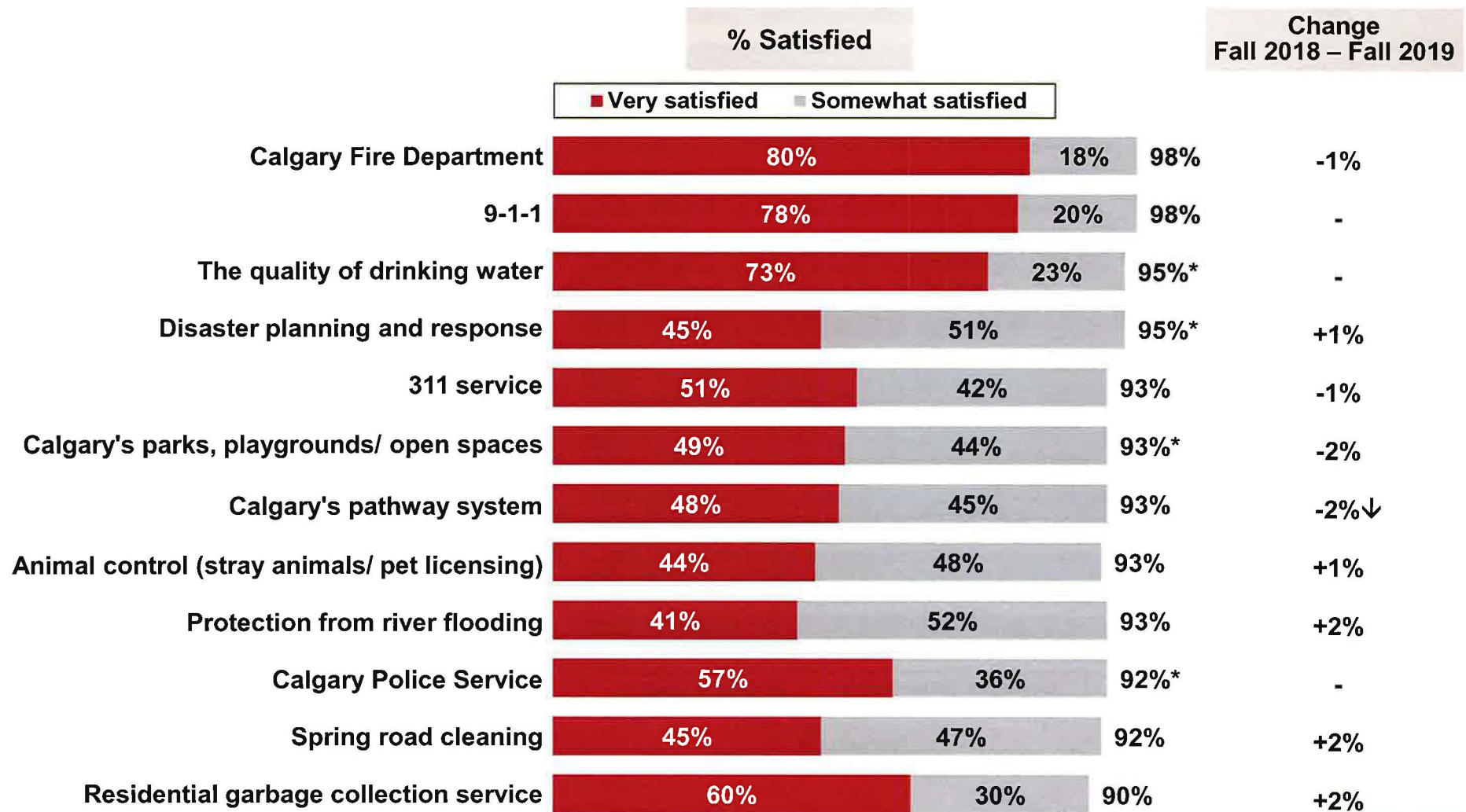


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)

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

Satisfaction with City Programs and Services



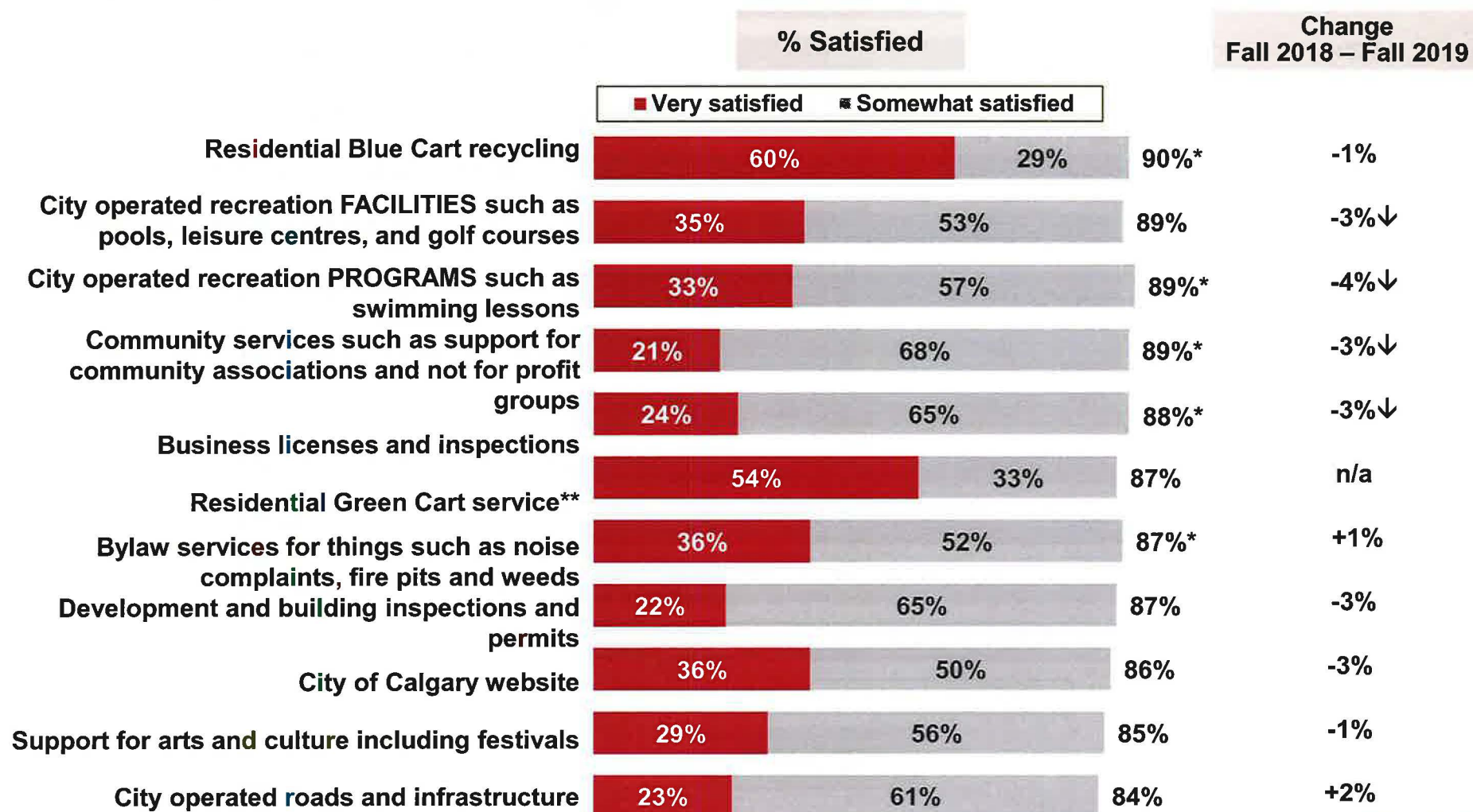
*Rounding

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)

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



Satisfaction with City Programs and Services (continued)

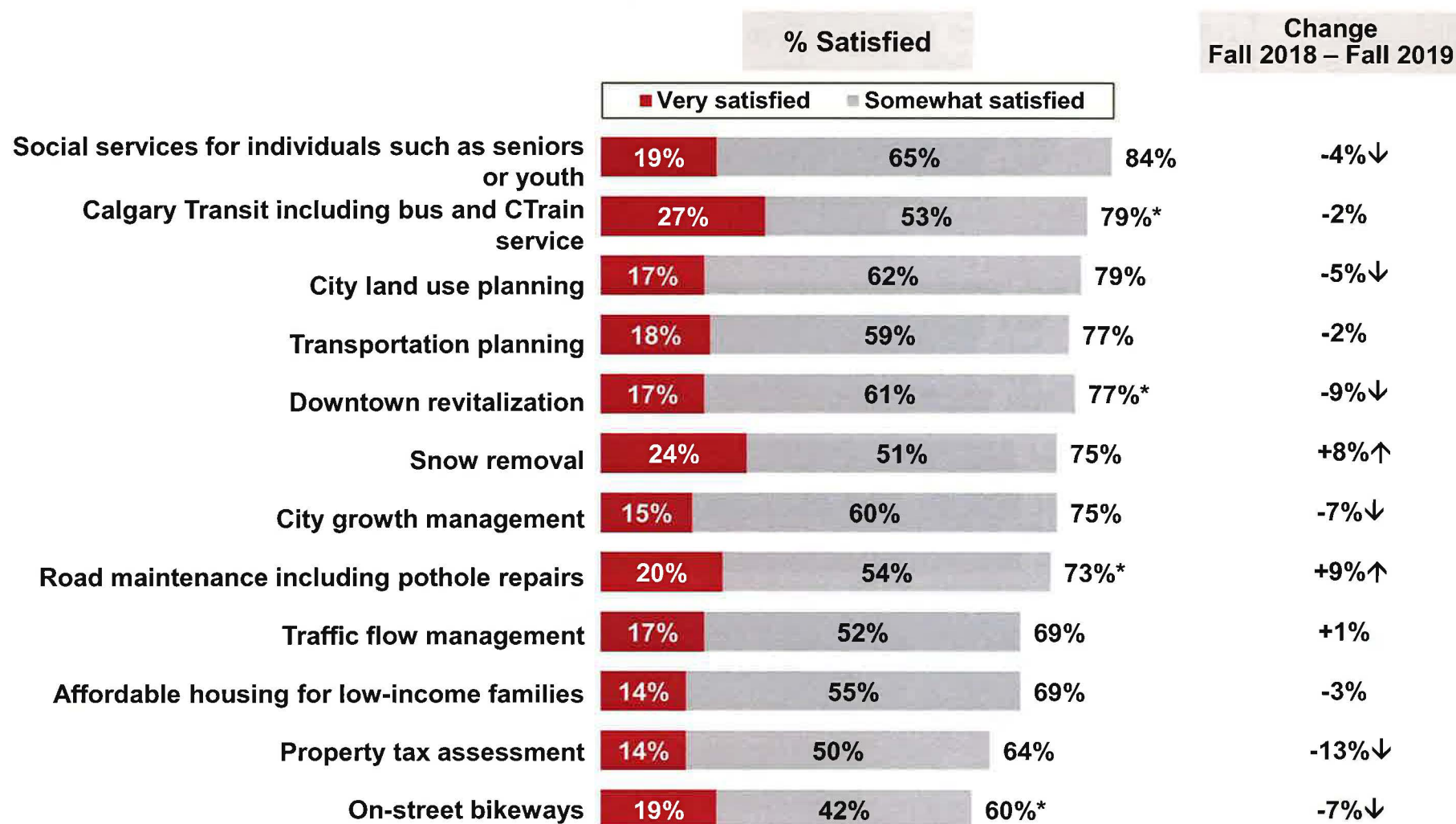


*Rounding

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) | **New item in Fall 2019

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

Satisfaction with City Programs and Services (continued)



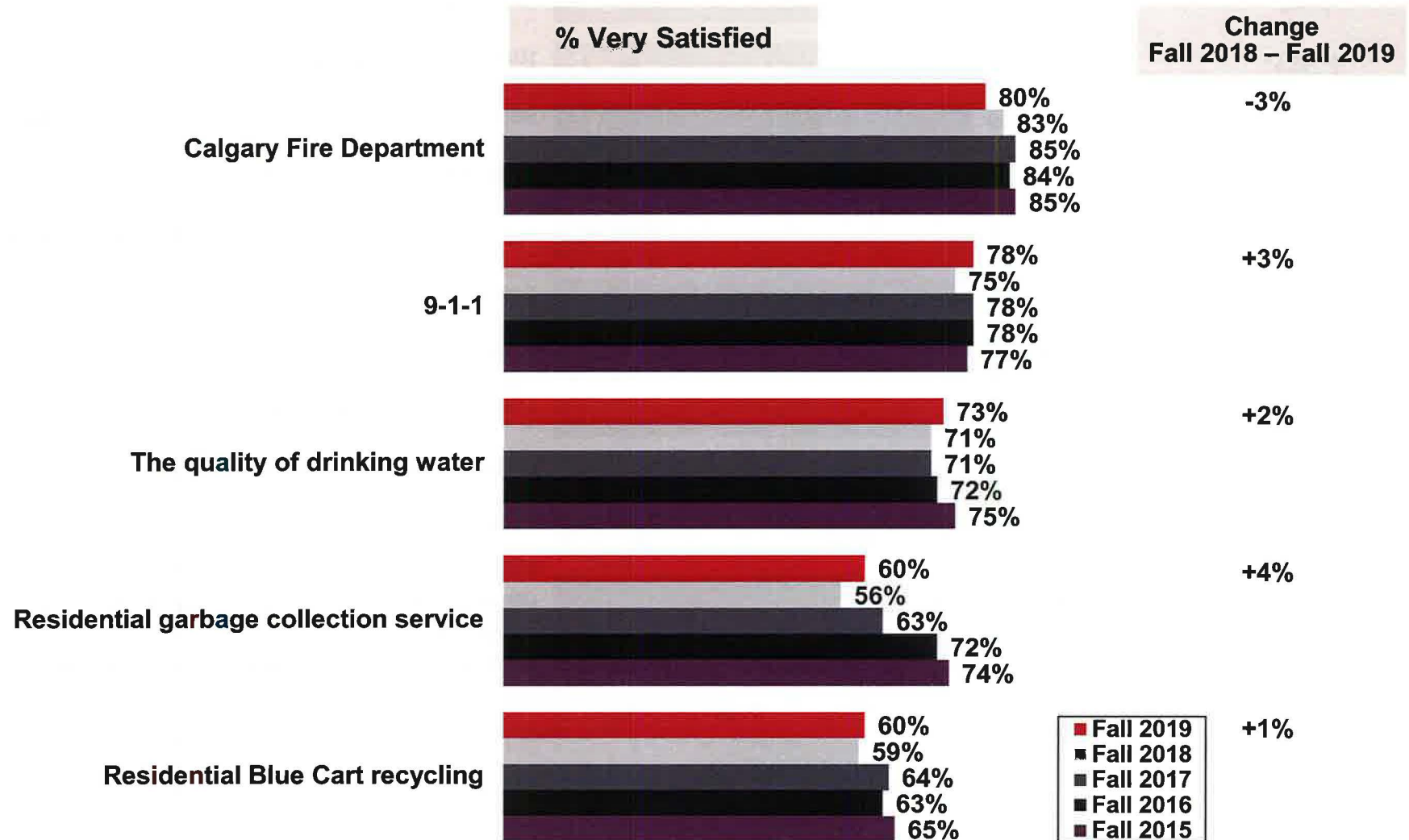
*Rounding

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)

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

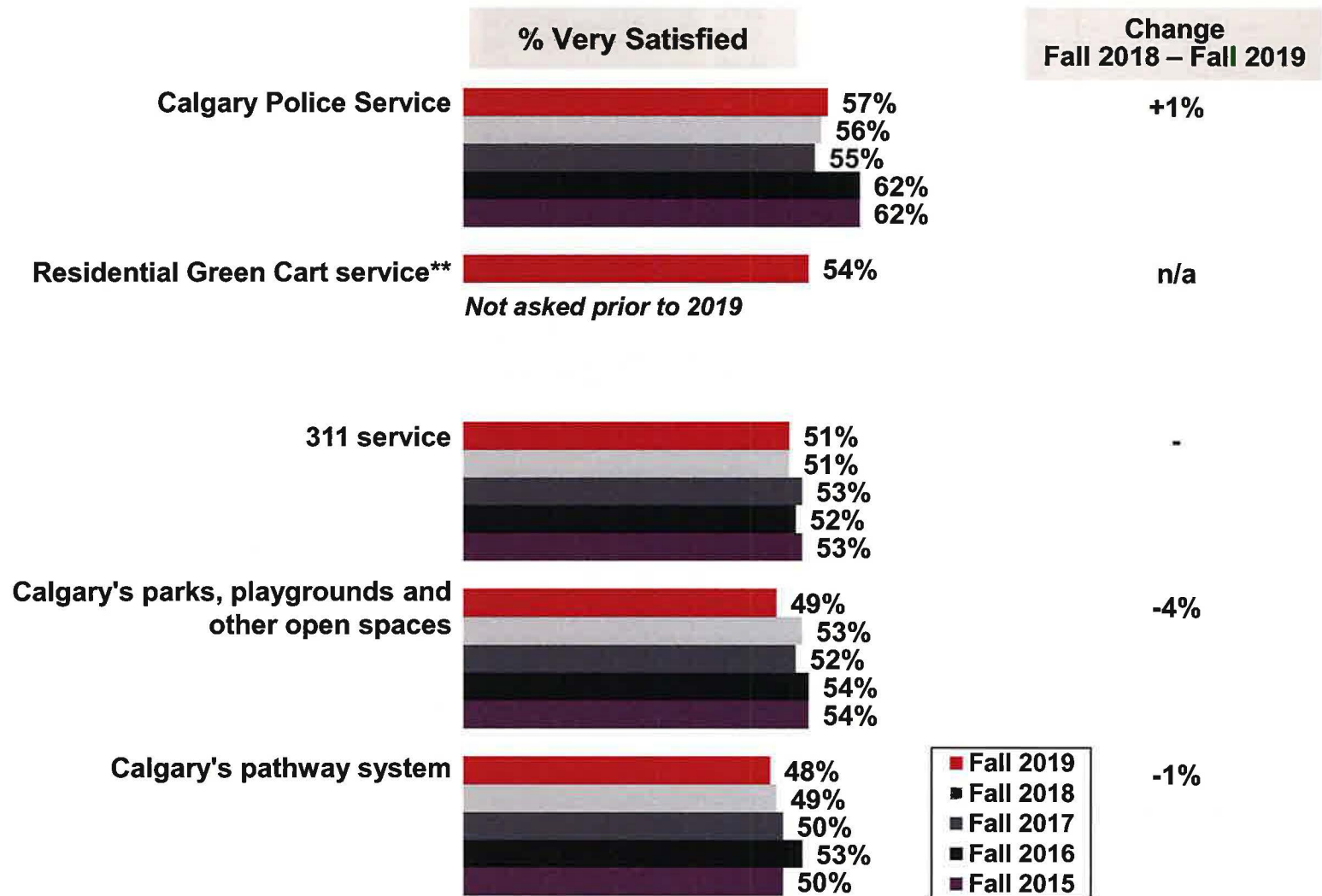


Tracking Satisfaction with City Programs and Services



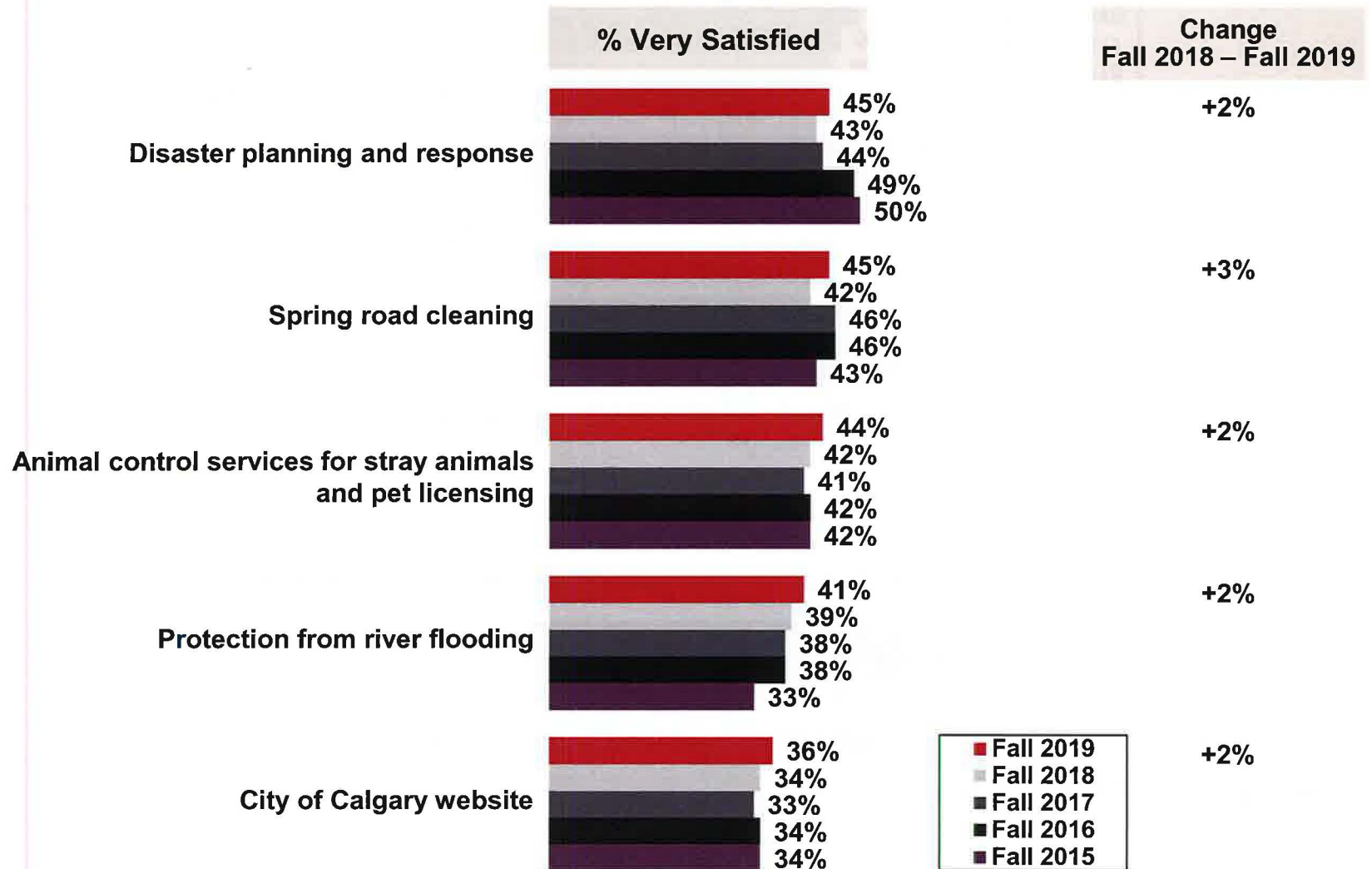
*I am going to read a list of programs and services provided to you by The City of Calgary.
Please tell me how satisfied you are with the job The City is doing in providing that program or service.*
Base: Valid respondents (Bases vary)

Tracking Satisfaction with City Programs and Services (continued)



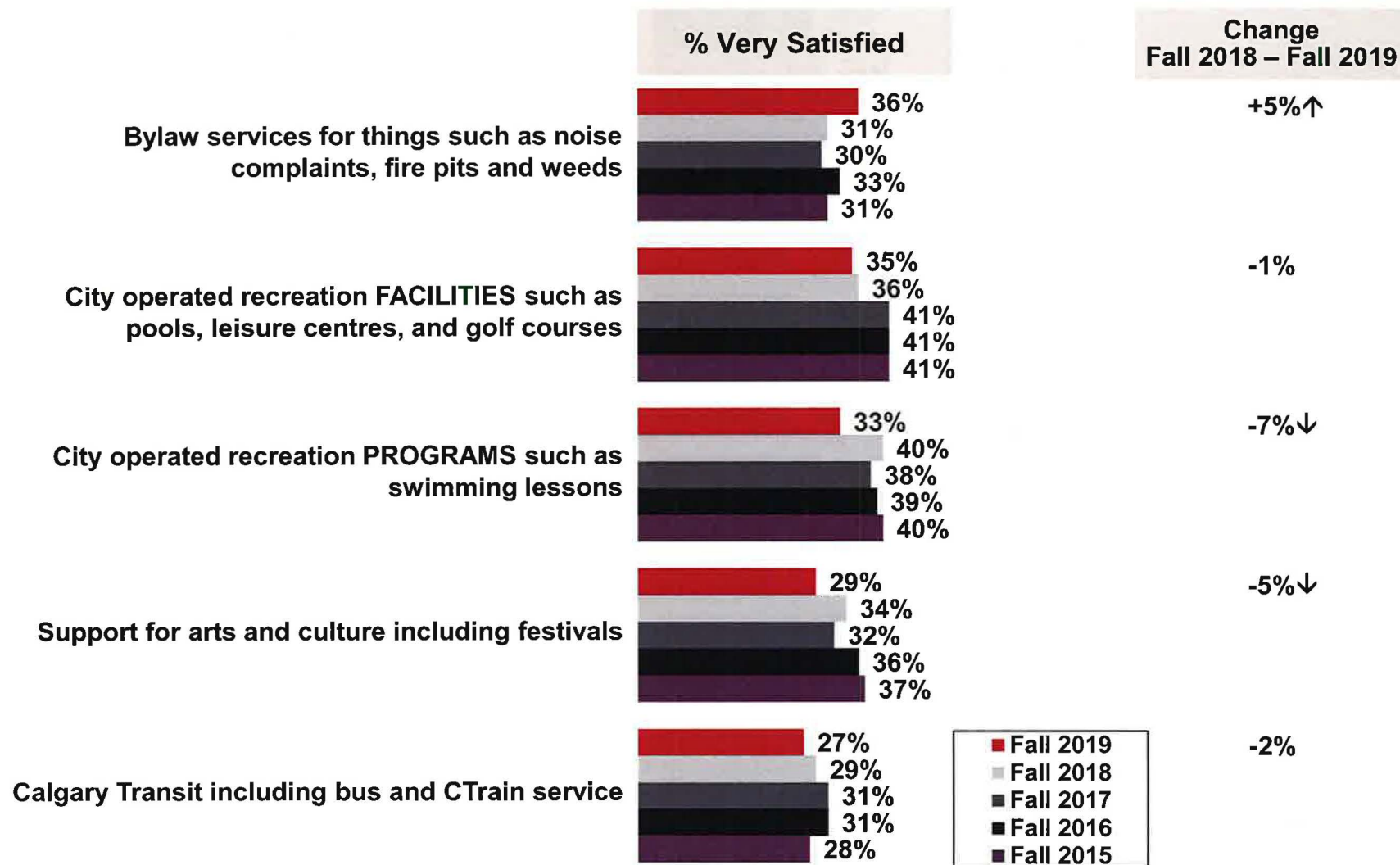
I am going to read a list of programs and services provided to you by The City of Calgary.
 Please tell me how satisfied you are with the job The City is doing in providing that program or service.
 Base: Valid respondents (Bases vary) | **New item in Fall 2019

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)

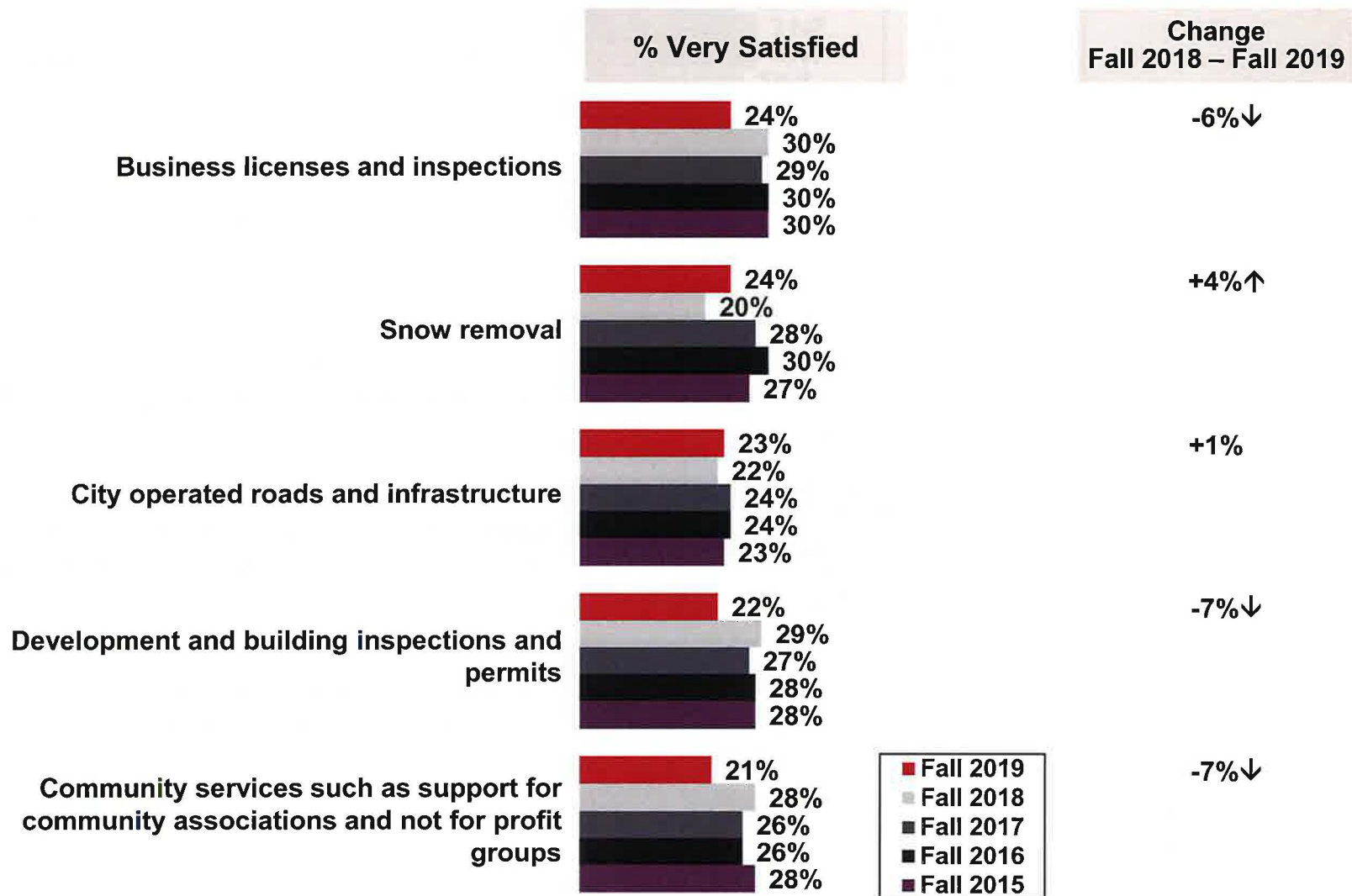
Tracking Satisfaction with City Programs and Services (continued)



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)

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

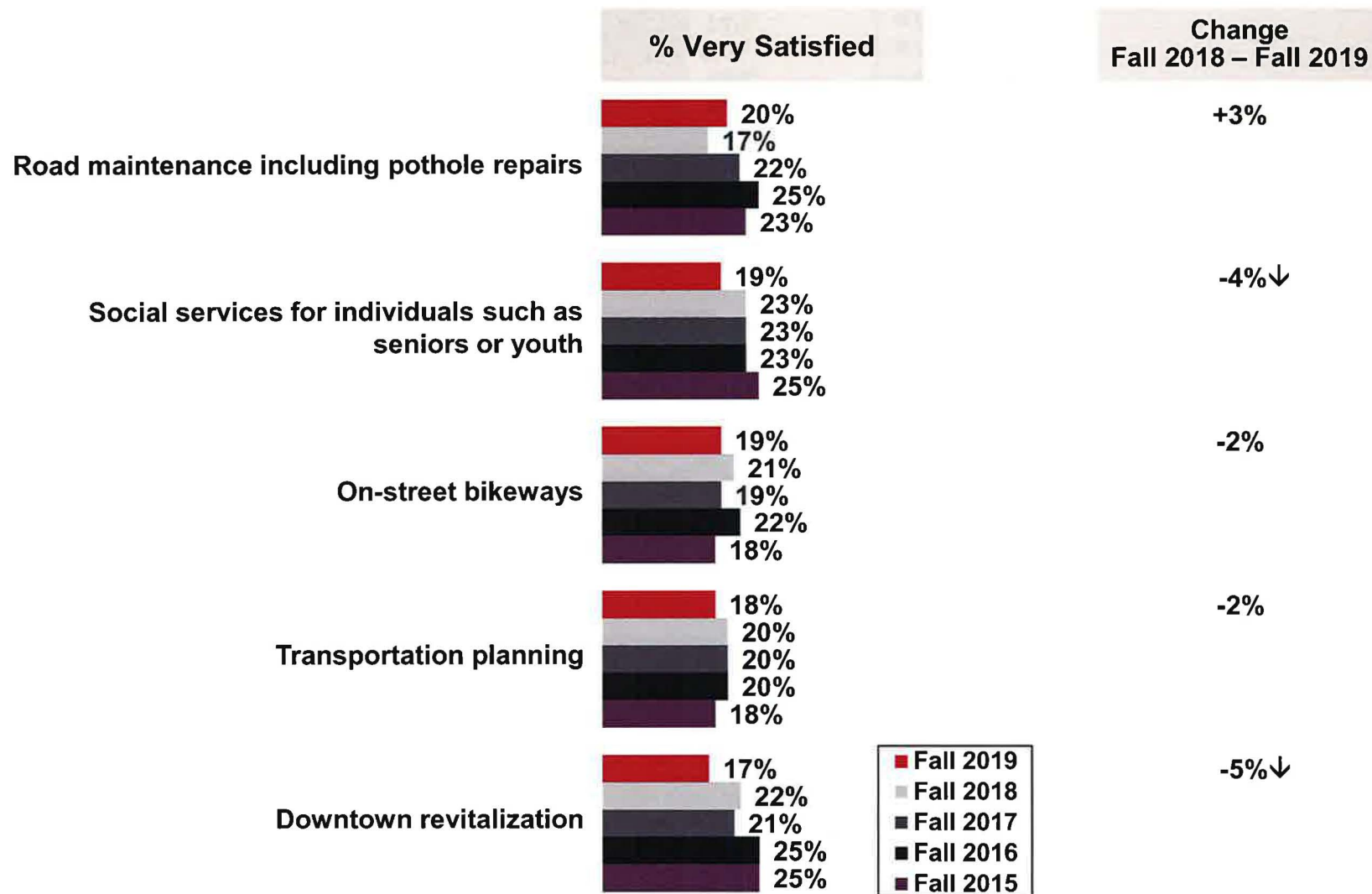
Tracking Satisfaction with City Programs and Services (continued)



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)

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

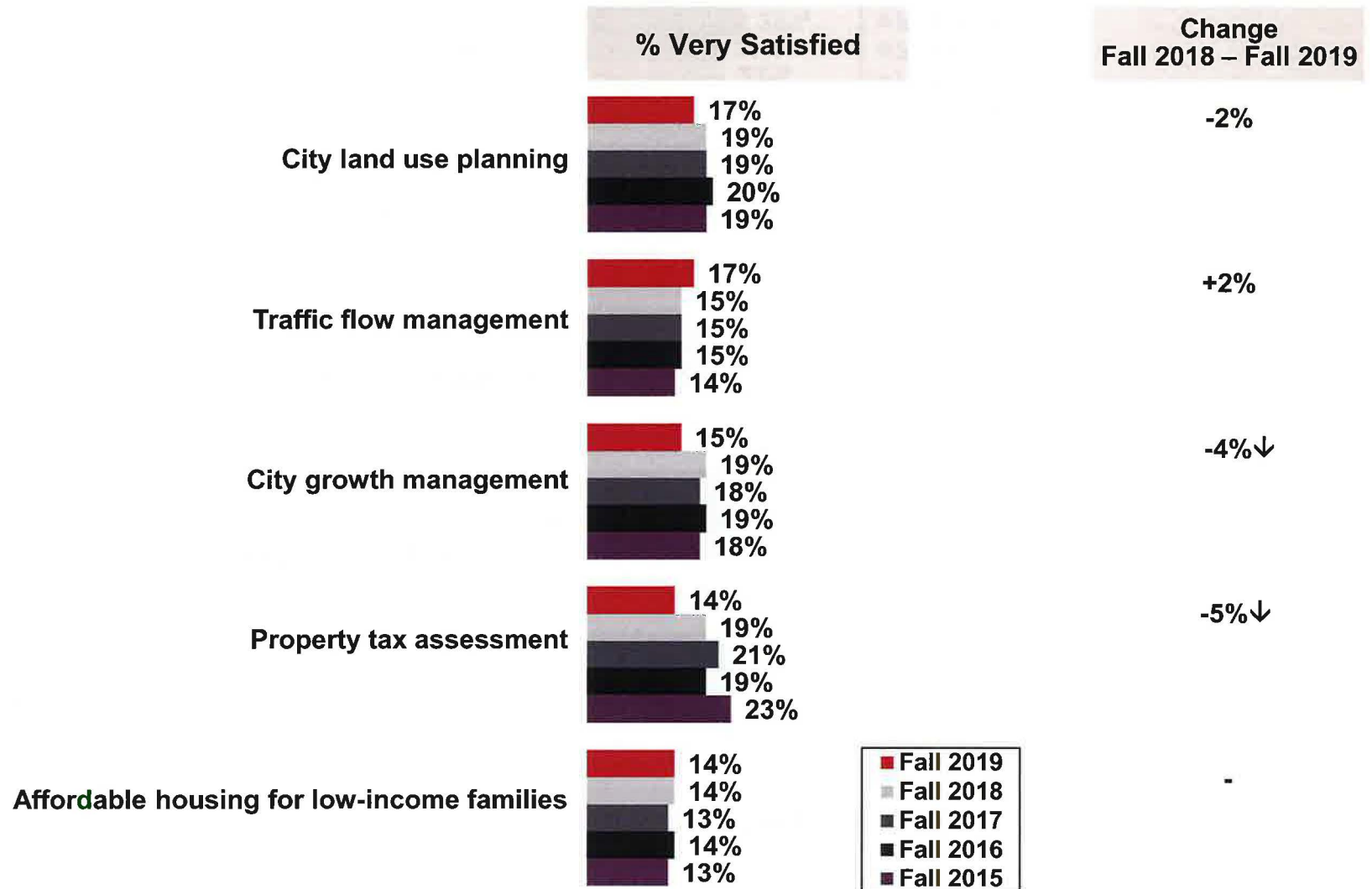
Tracking Satisfaction with City Programs and Services (continued)



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)

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

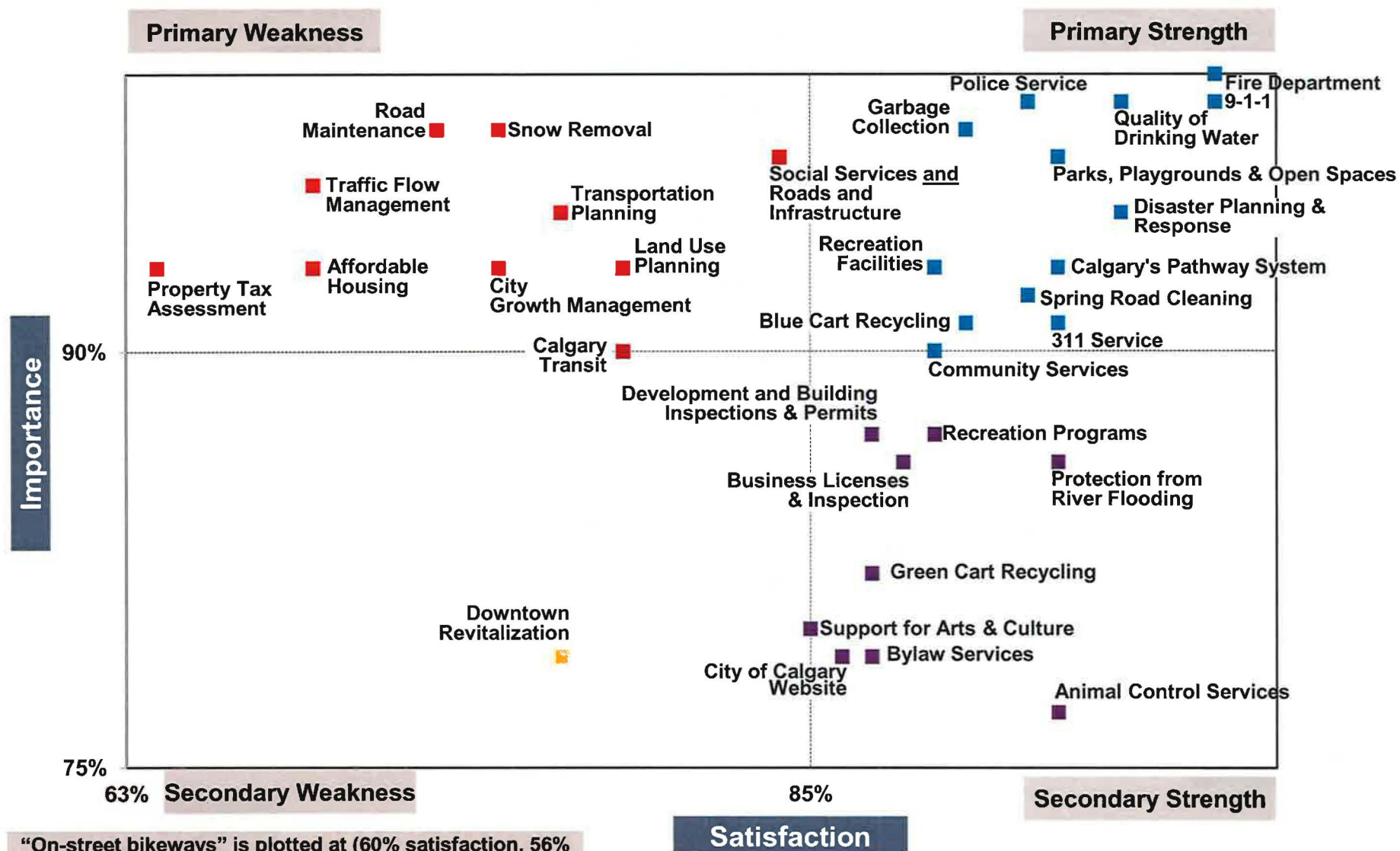
Tracking Satisfaction with City Programs and Services (continued)



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)

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

Importance vs. Satisfaction Grid

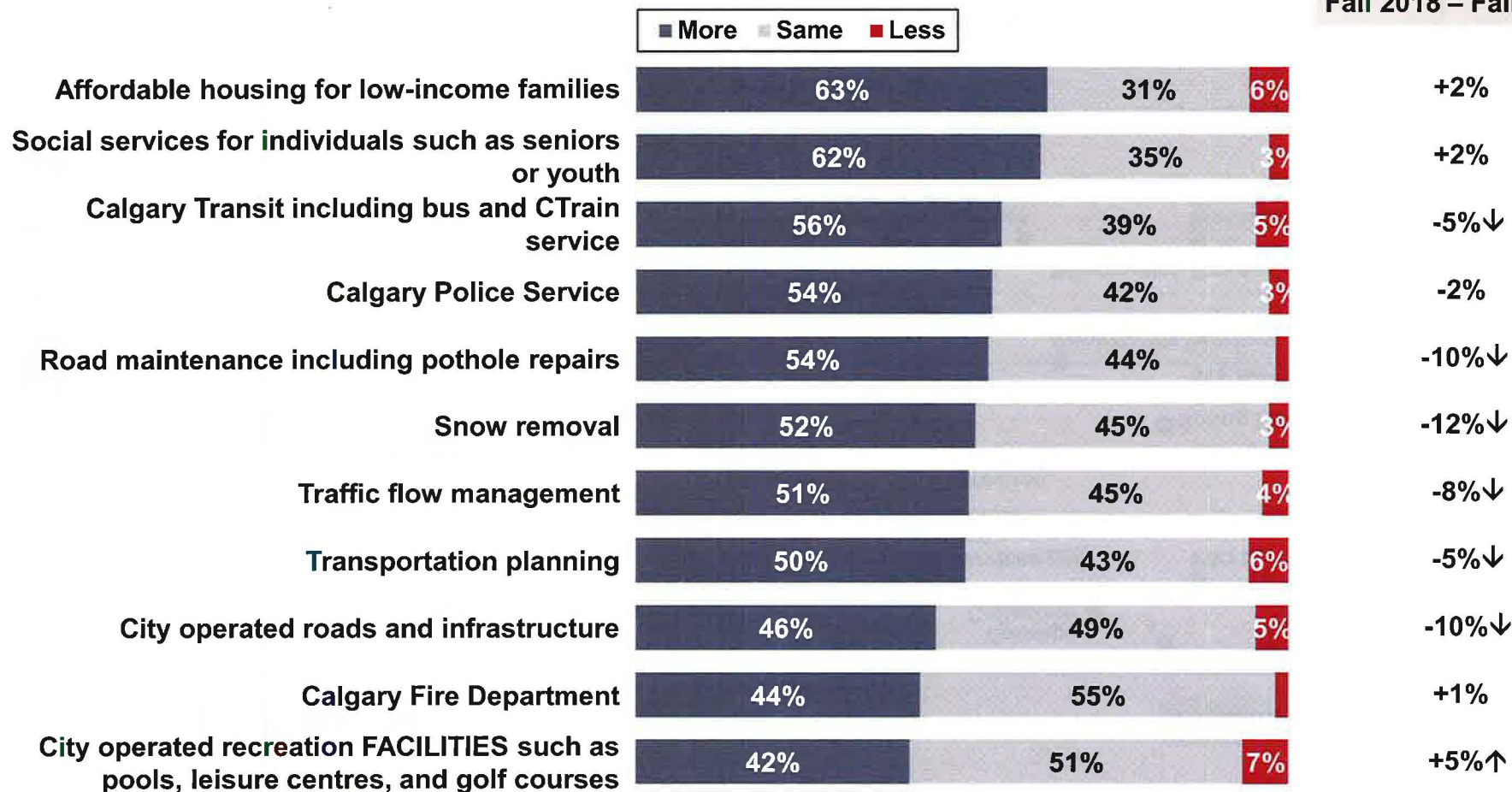




Investment in City Programs and Services

Invest More

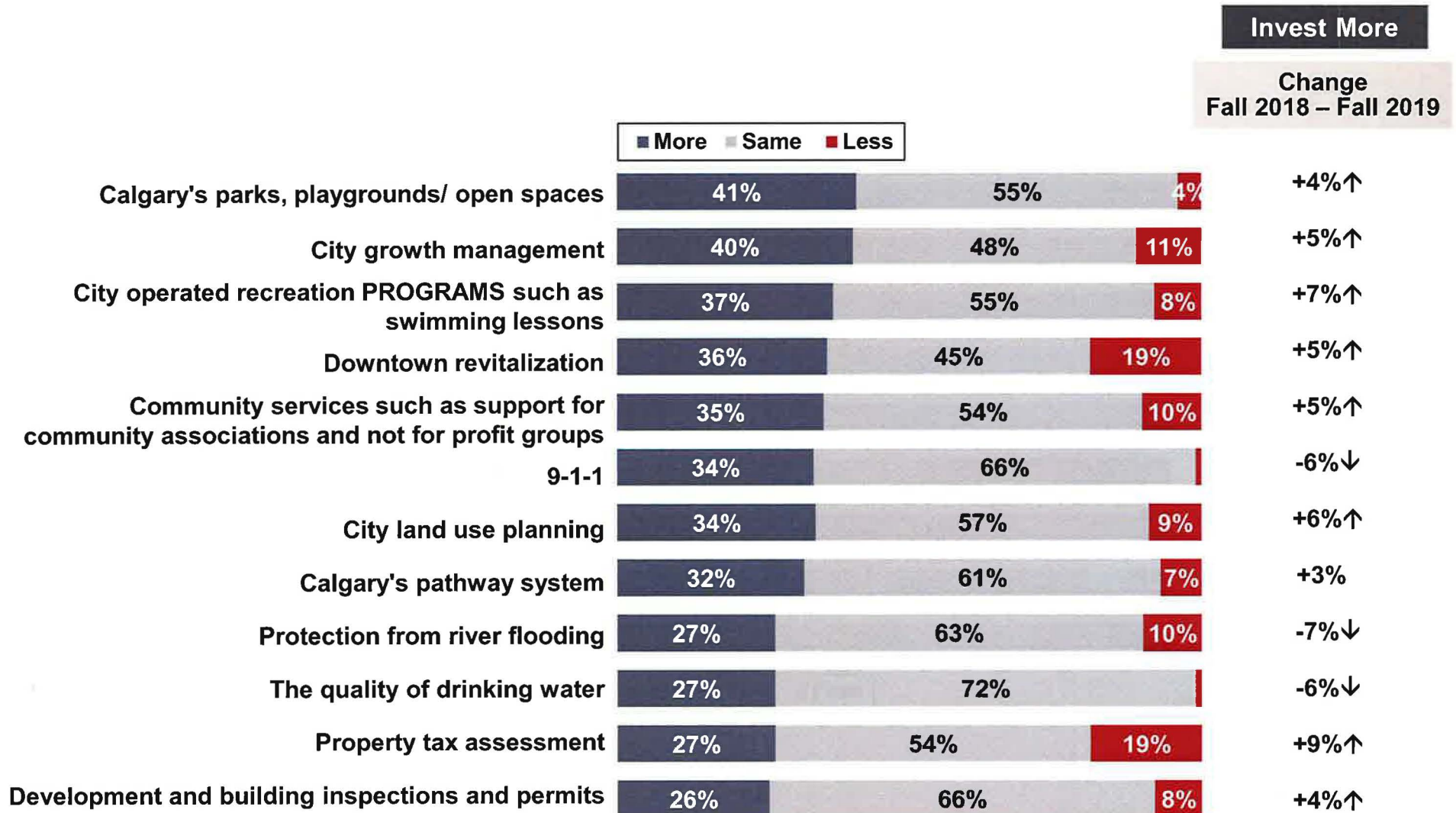
Change
Fall 2018 – Fall 2019



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)

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

Investment in City Programs and Services (continued)

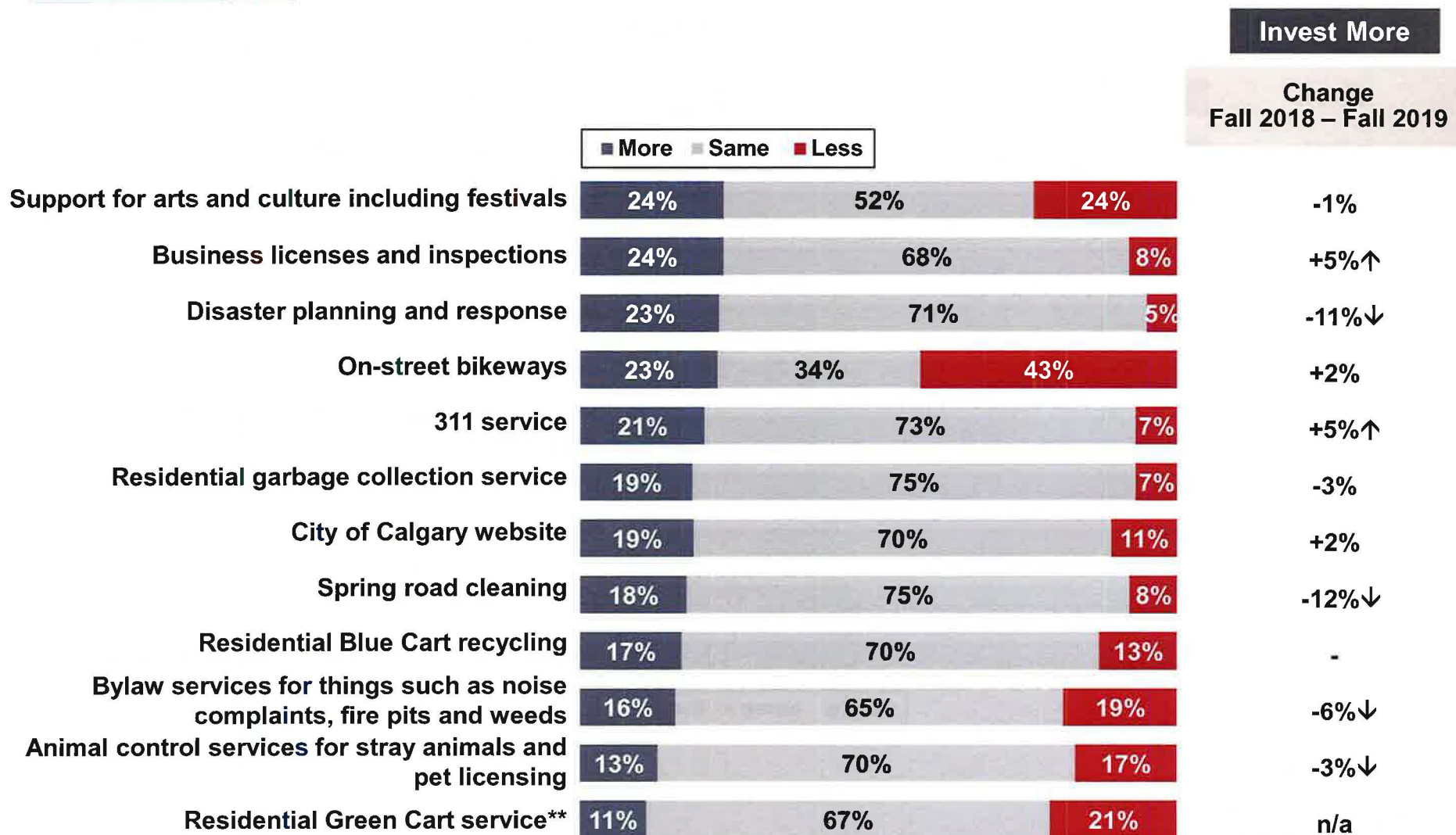


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.
Base: Valid respondents (Bases vary)

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



Investment in 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 if you think The City should invest more, less or the same amount on the program or service.
Base: Valid respondents (Bases vary) | **New item in Fall 2019

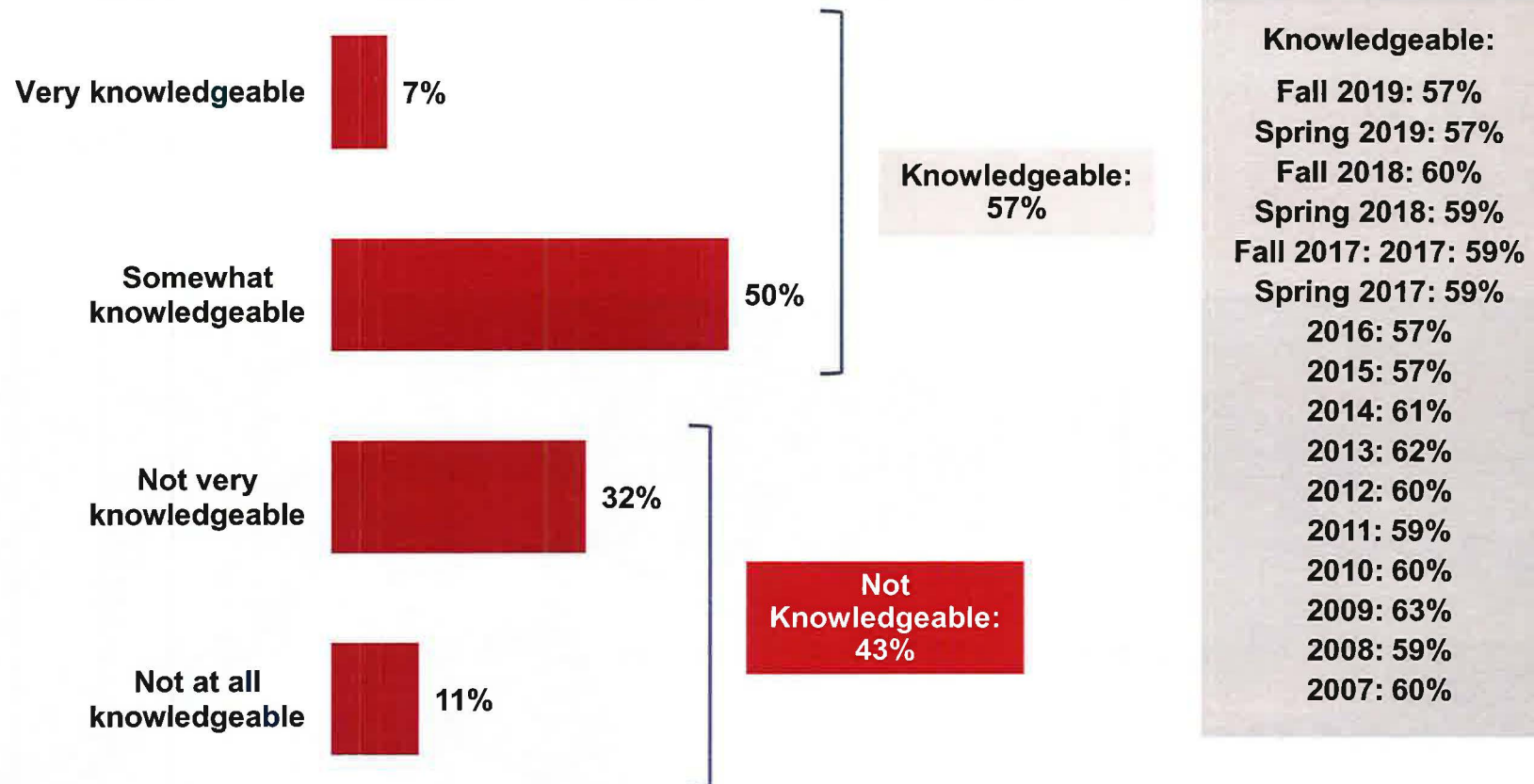
↑ Statistically higher than Fall 2018
↓ Statistically lower than Fall 2018



Taxation



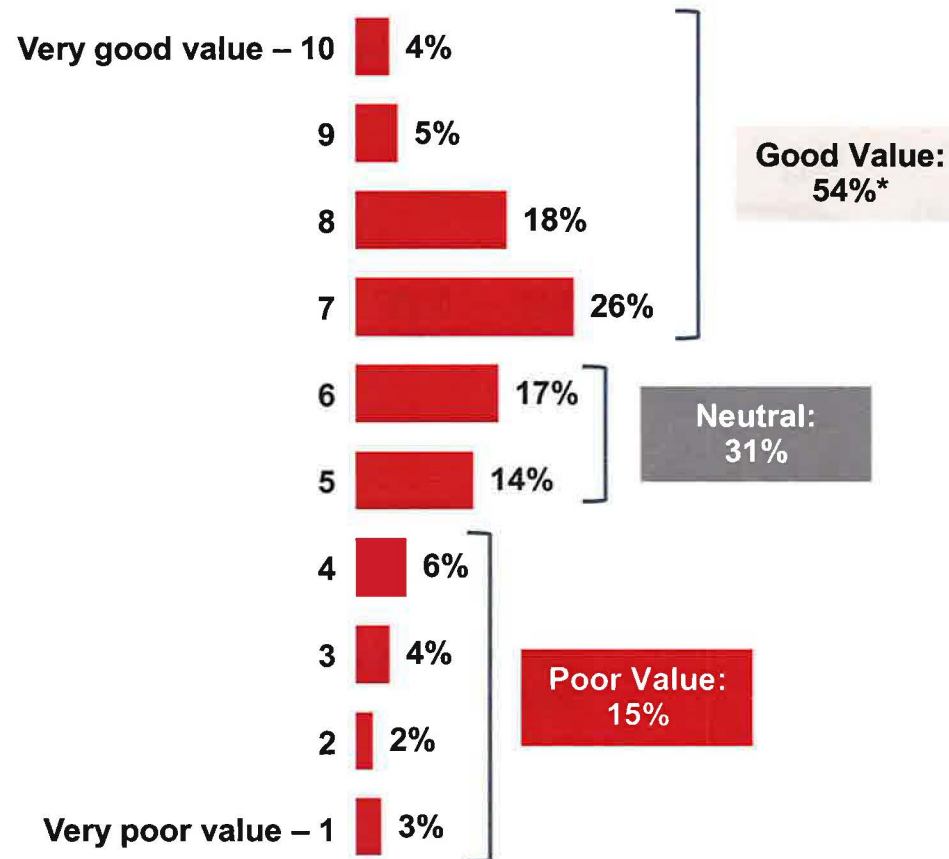
Knowledge Levels of Tax Dollar Spending



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 (n=2,490)

Perceived Value of Property Taxes



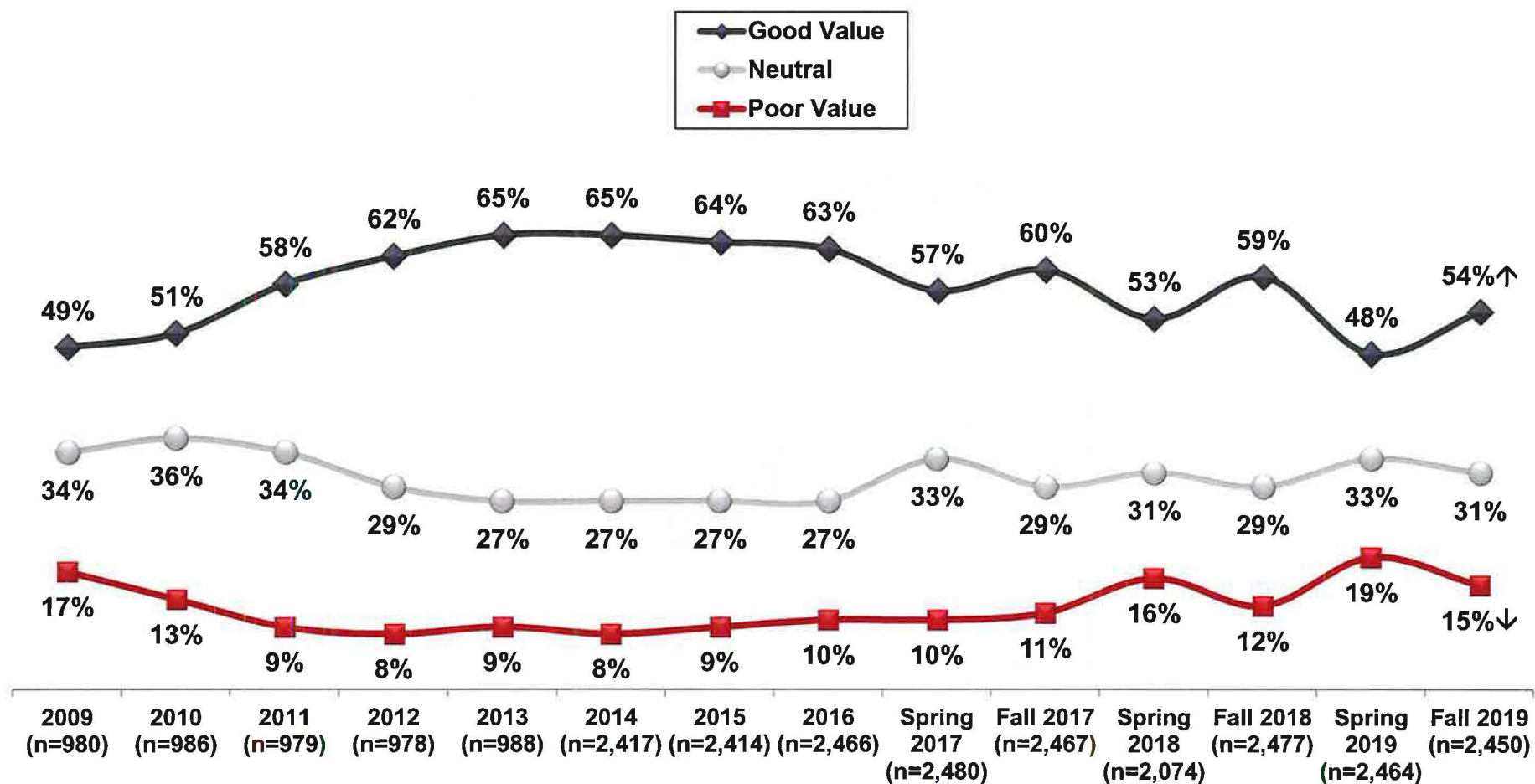
**Rounding*

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=2,450)



Tracking Perceived Value of Property Taxes

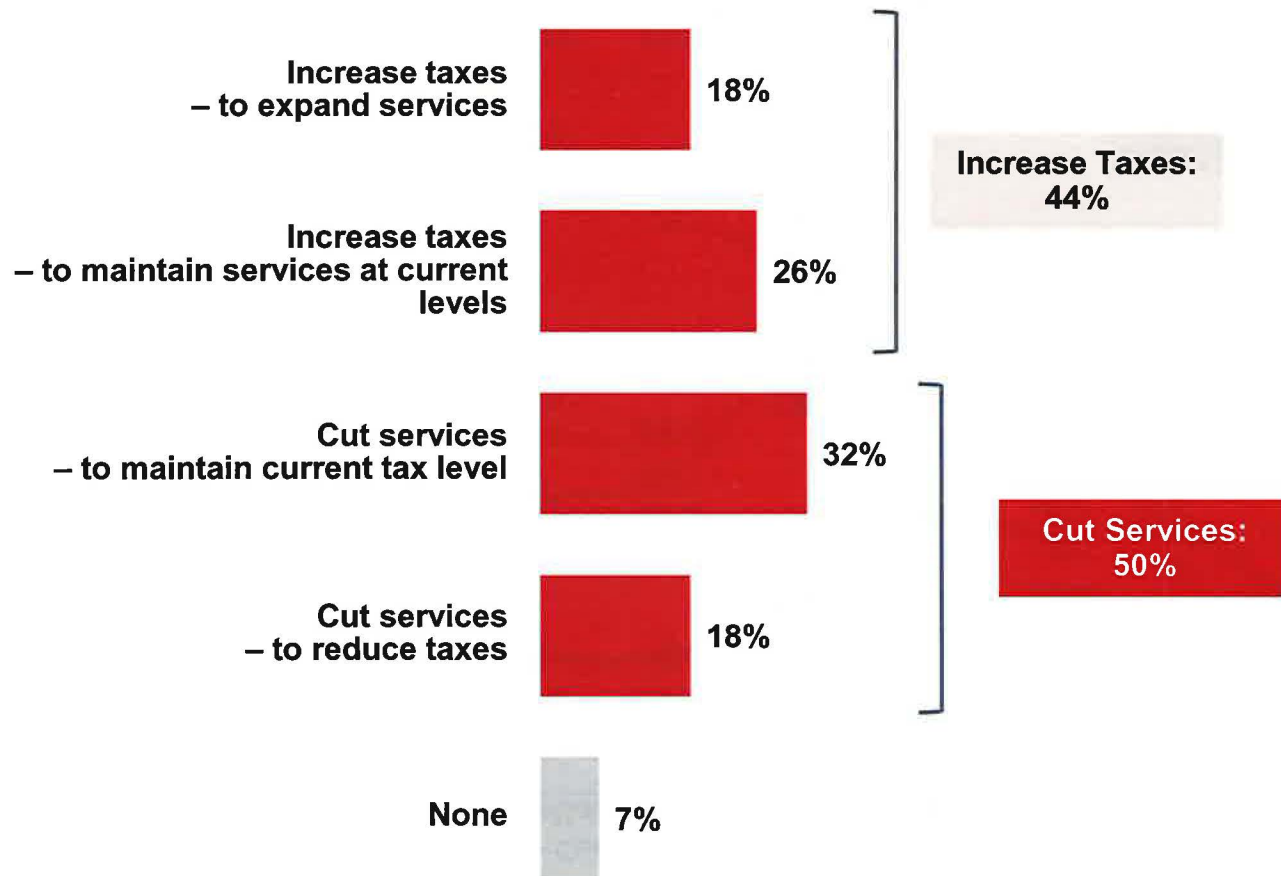


↑ Statistically higher than Spring 2019
↓ Statistically lower than Spring 2019

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

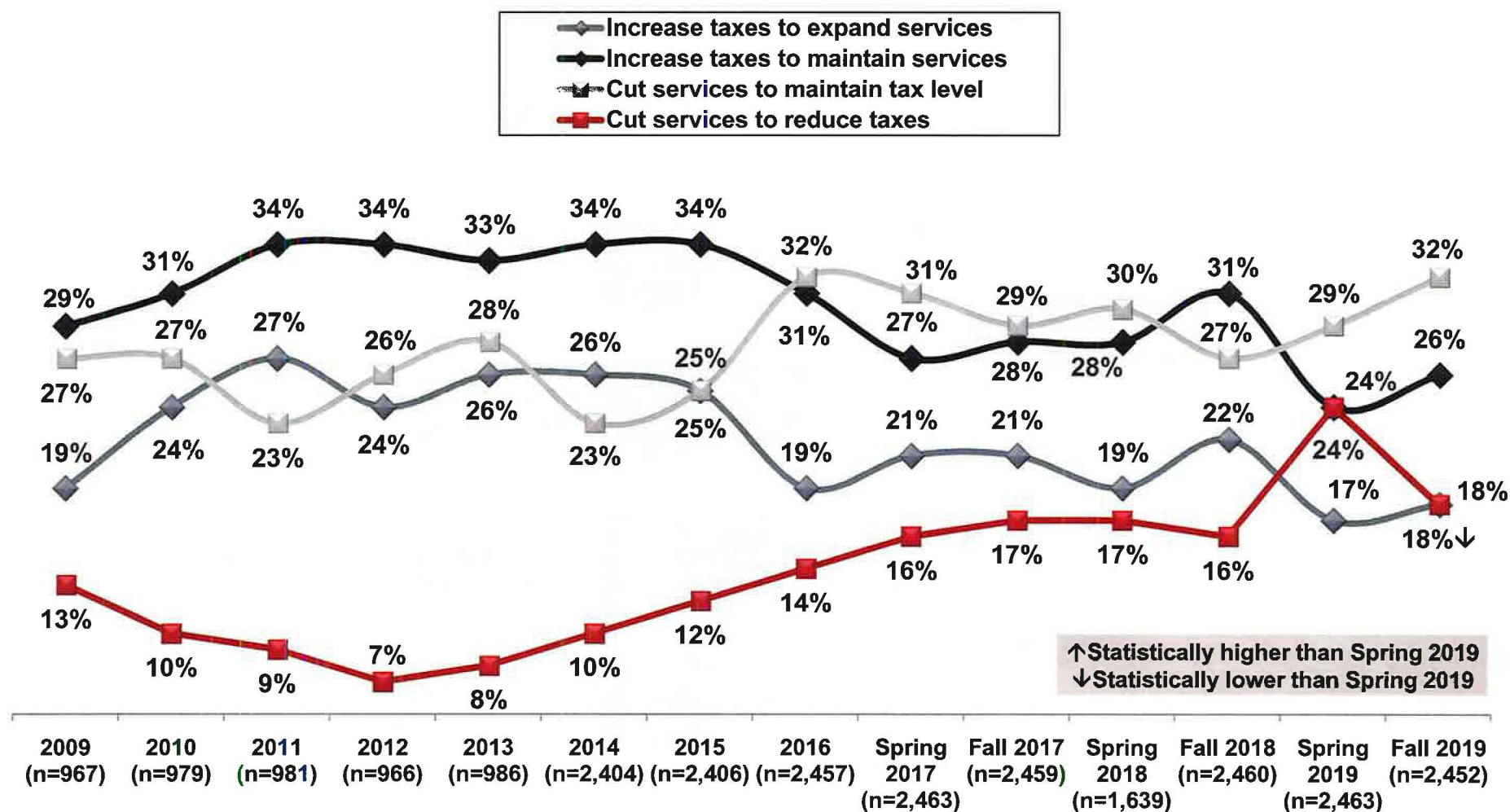


Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents (n=2,452)



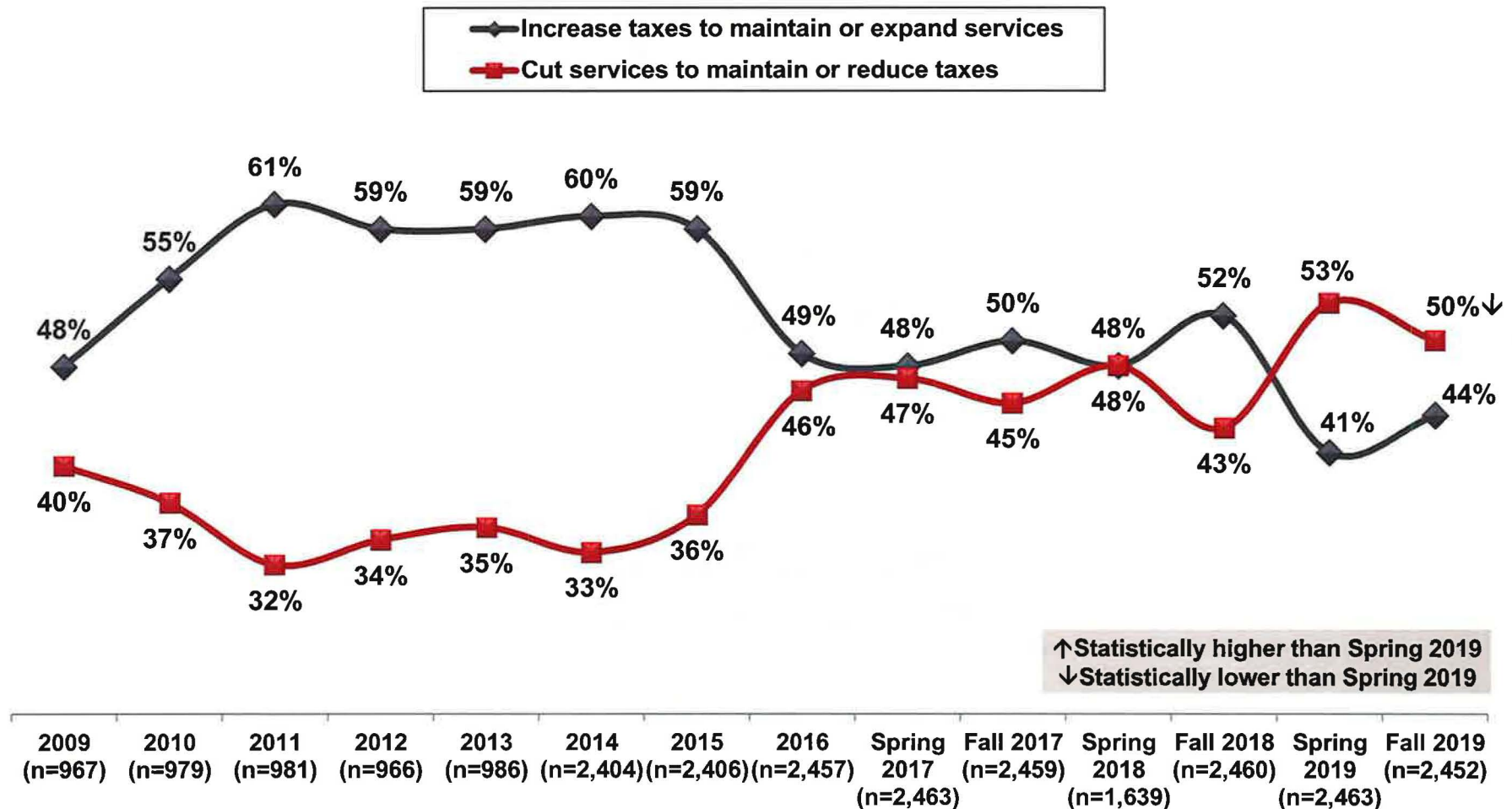
Tracking Balancing Taxation and Service Delivery Levels



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

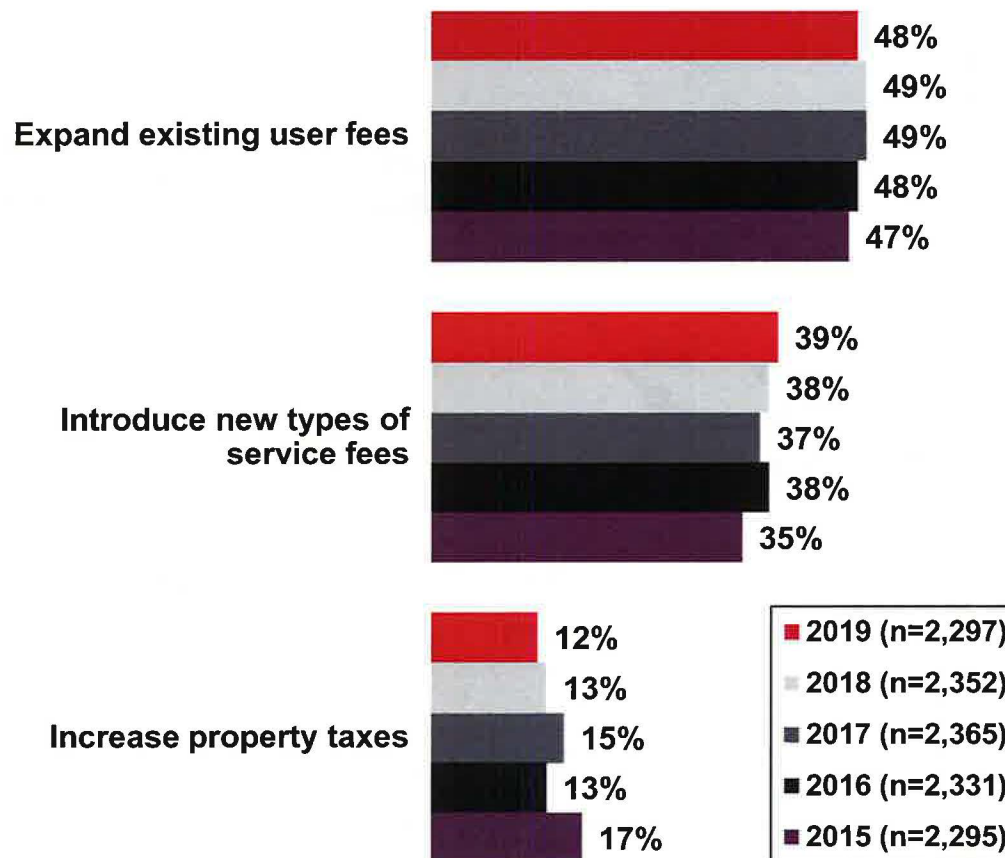
Tracking Balancing Taxation and Service Delivery Levels: Increase Taxes versus Cut Services



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



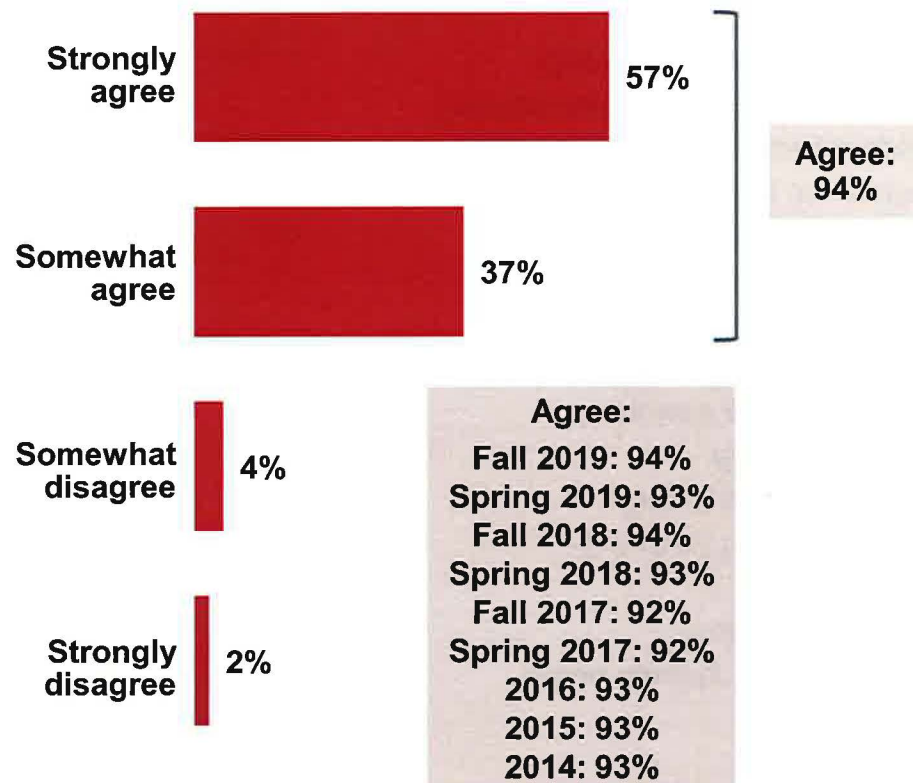
Should The City need to increase the amount of revenue it collects from citizens for new or emerging services, would you prefer The City to ...?

Base: Valid respondents

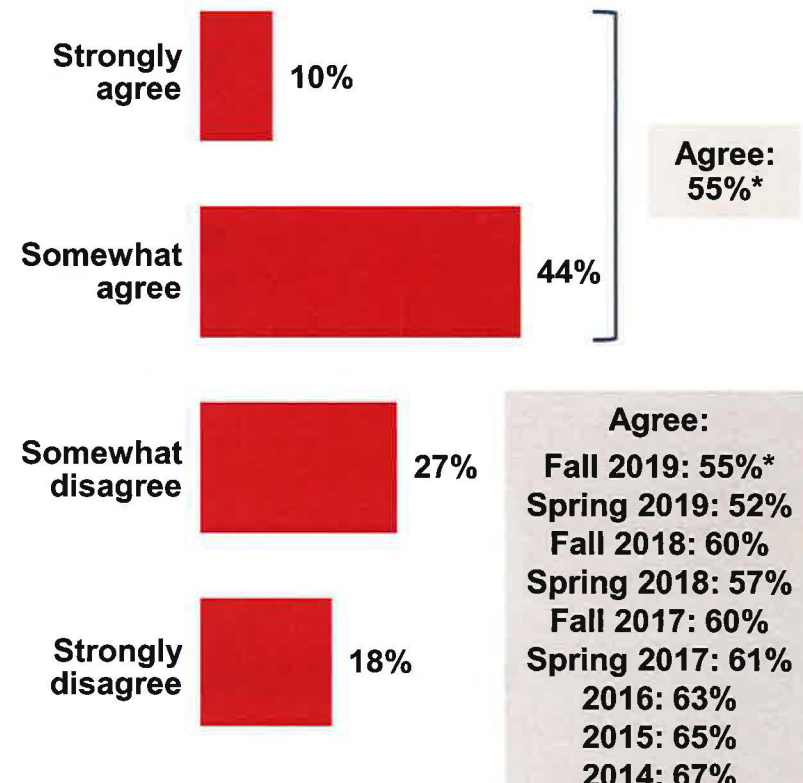
All waves conducted in the Fall

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.

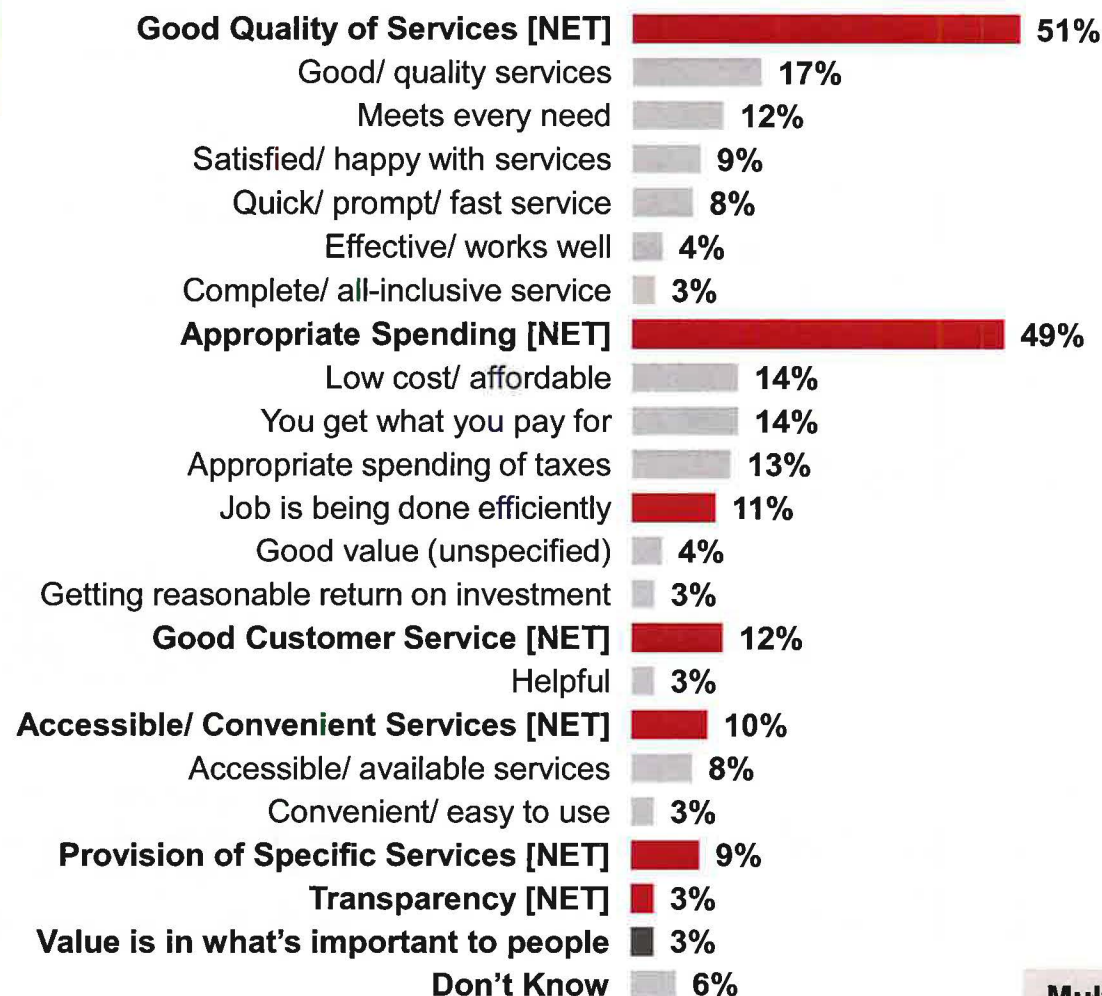
Base: Valid respondents (n=2,487 / n=2,465)

*Rounding



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

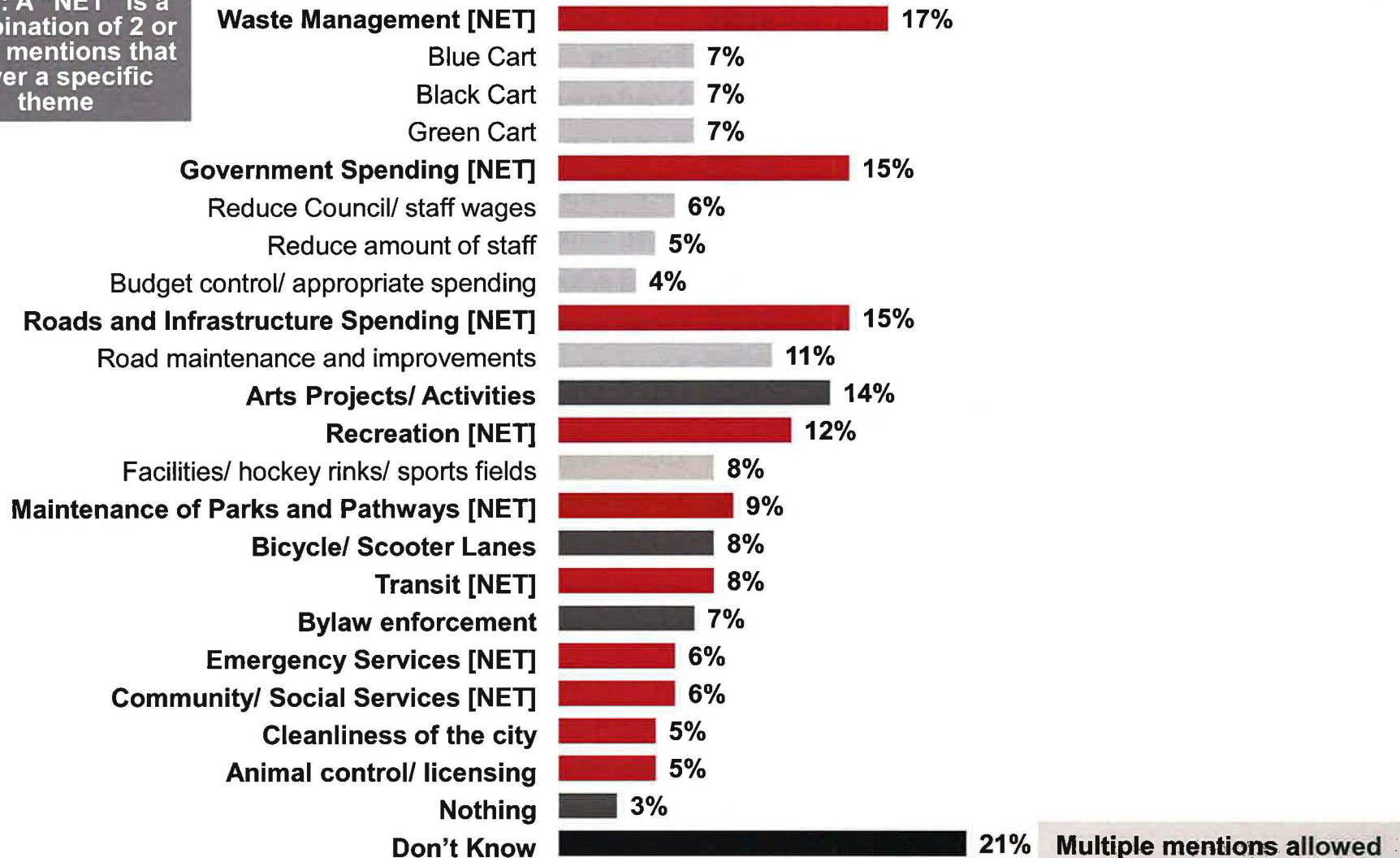
NET mentions of <3% are not shown

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)



Proposed Service Reductions

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



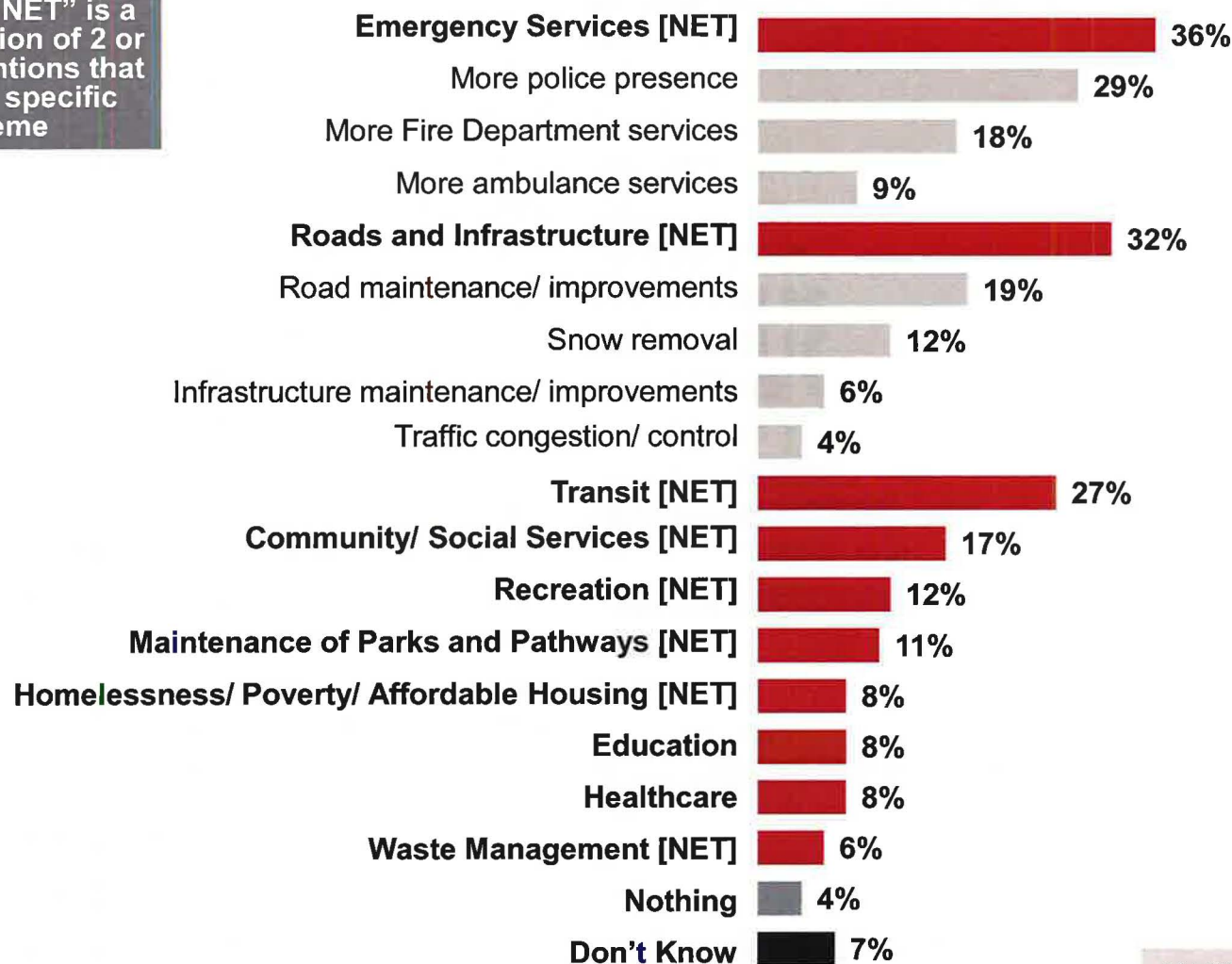
New Question in Fall 2019: Of all the services you know of that are provided by The City of Calgary, name up to three services that you would propose to have a service reduction in order to save costs. Base: Valid respondents (n=2,502)

NET mentions of $\leq 5\%$ are not shown



Proposed Service Increases

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



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)

Multiple mentions allowed

NET mentions of ≤5% are not shown



Contact with The City and Customer Service





Past 12 Months Contact with The City of Calgary

Multiple Responses



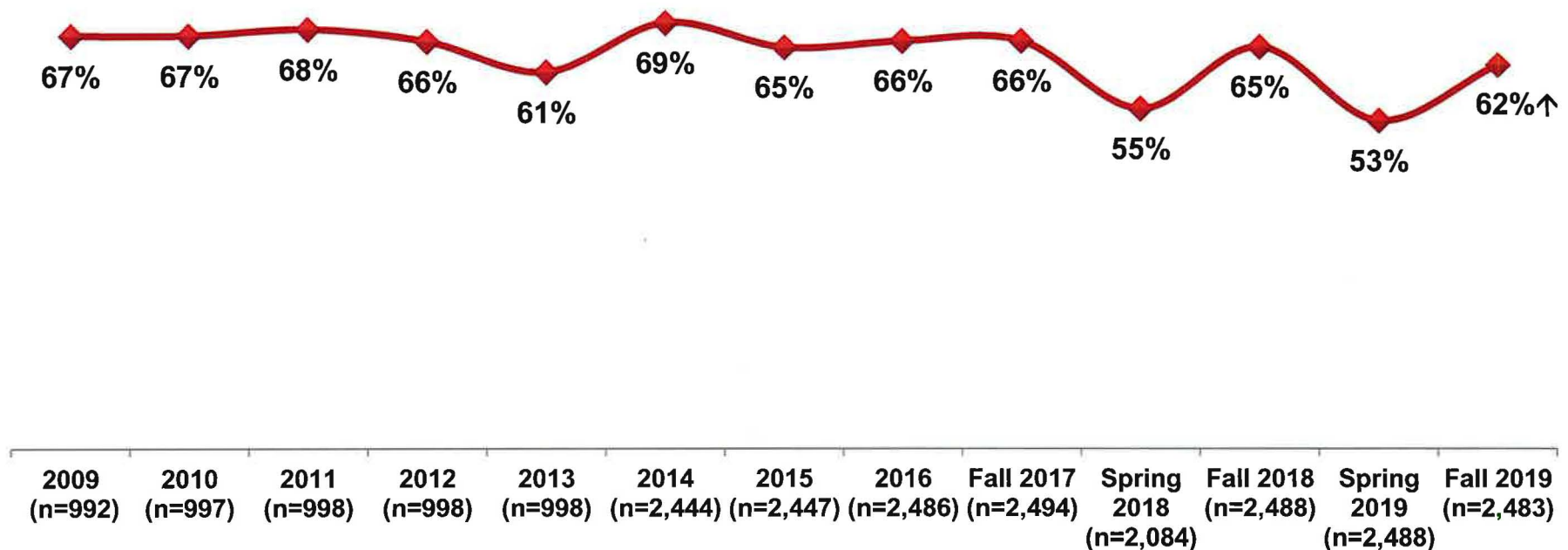
Have you contacted The City of Calgary or dealt with The City or one of its employees in the last twelve months?

Base: Valid respondents (n=2,483)



Tracking Past 12 Months Contact with The City of Calgary

% Yes



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

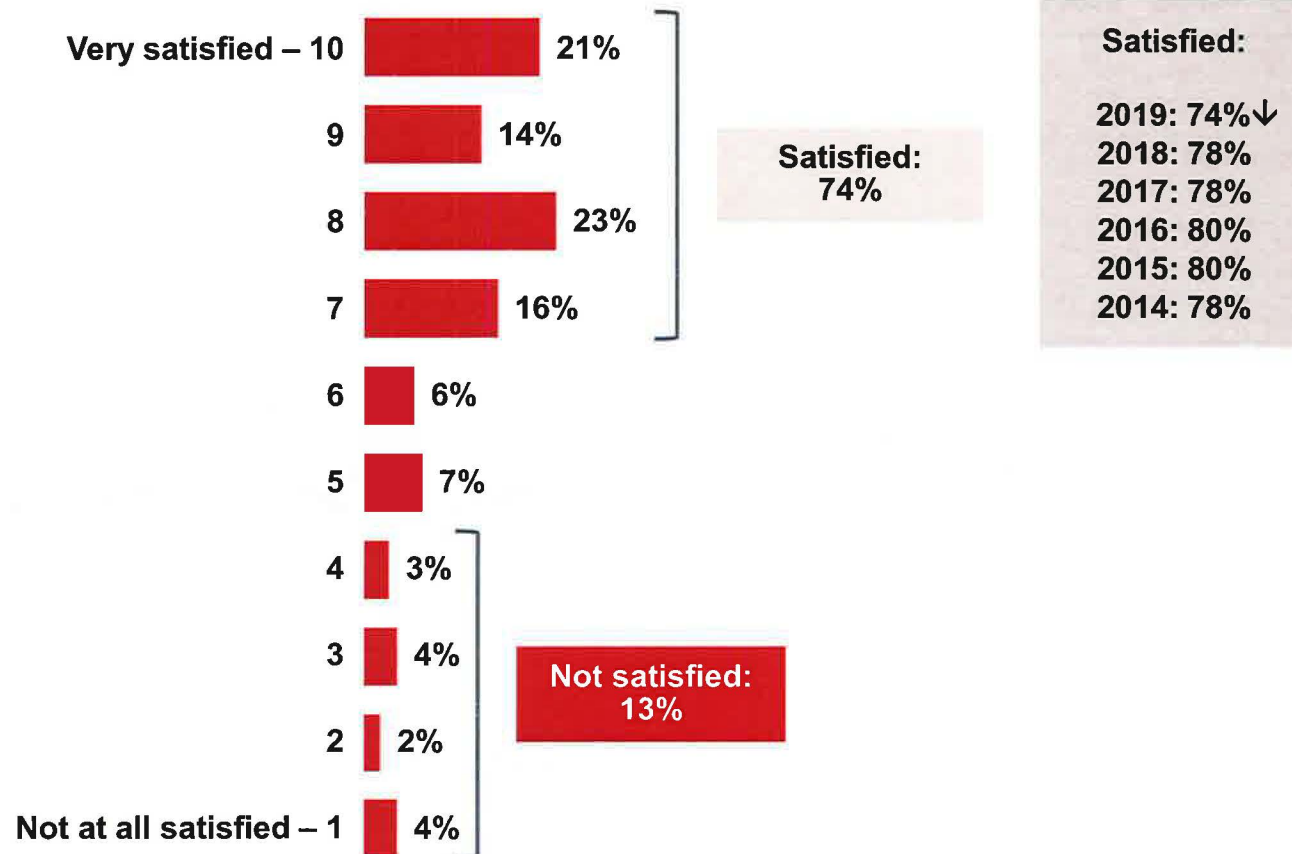
Base: Valid respondents

↑Statistically higher than Spring 2019

↓Statistically lower than Spring 2019



Satisfaction with the Overall Level and Quality of Customer Service



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

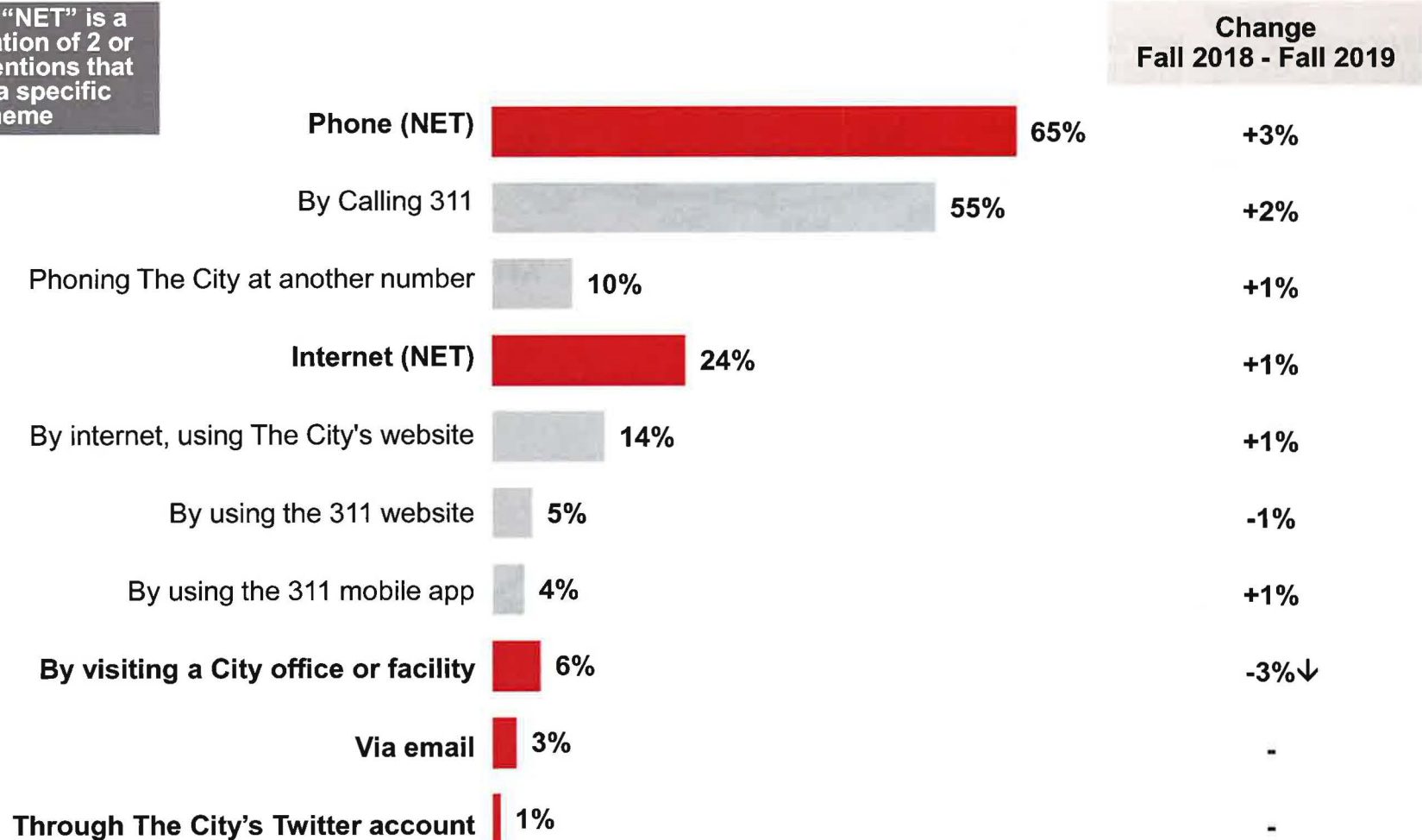
On a scale of 1 to 10 where “1” represents “not at all satisfied” and “10” represents “very satisfied”, how satisfied are you with the overall level and quality of customer service provided by The City of Calgary?

Base: Valid respondents who contacted or dealt with The City in the last twelve months (n=1,581)

All waves conducted in the Fall

Type of Contact

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



Mentions of <1% are not shown

When you contacted The City was it... ?

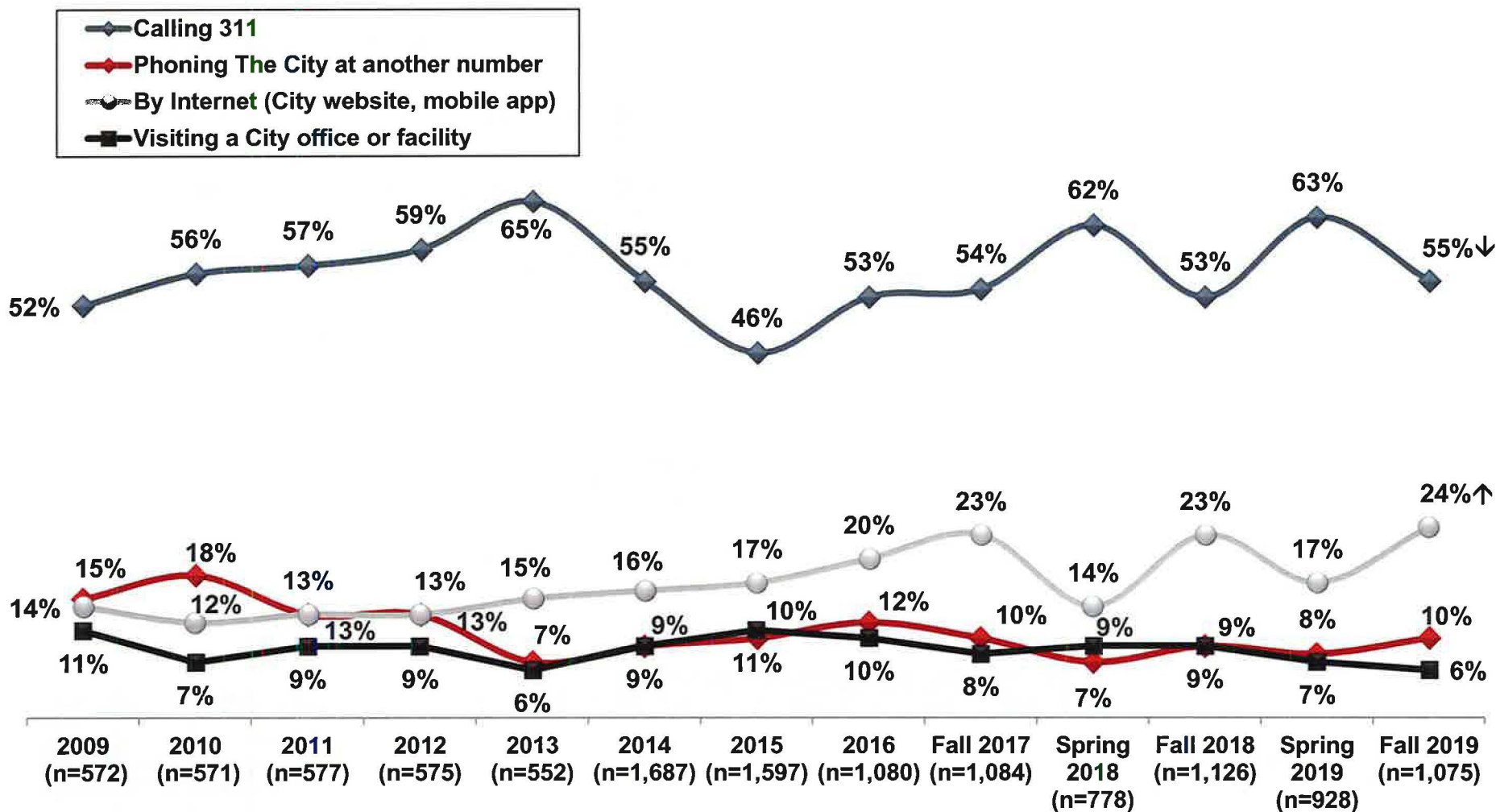
Base: Valid respondents who contacted The City in the last twelve months (n=1,075)

↑Statistically higher than Fall 2018

↓Statistically lower than Fall 2018



Tracking Type of Contact



When you contacted The City was it... ?

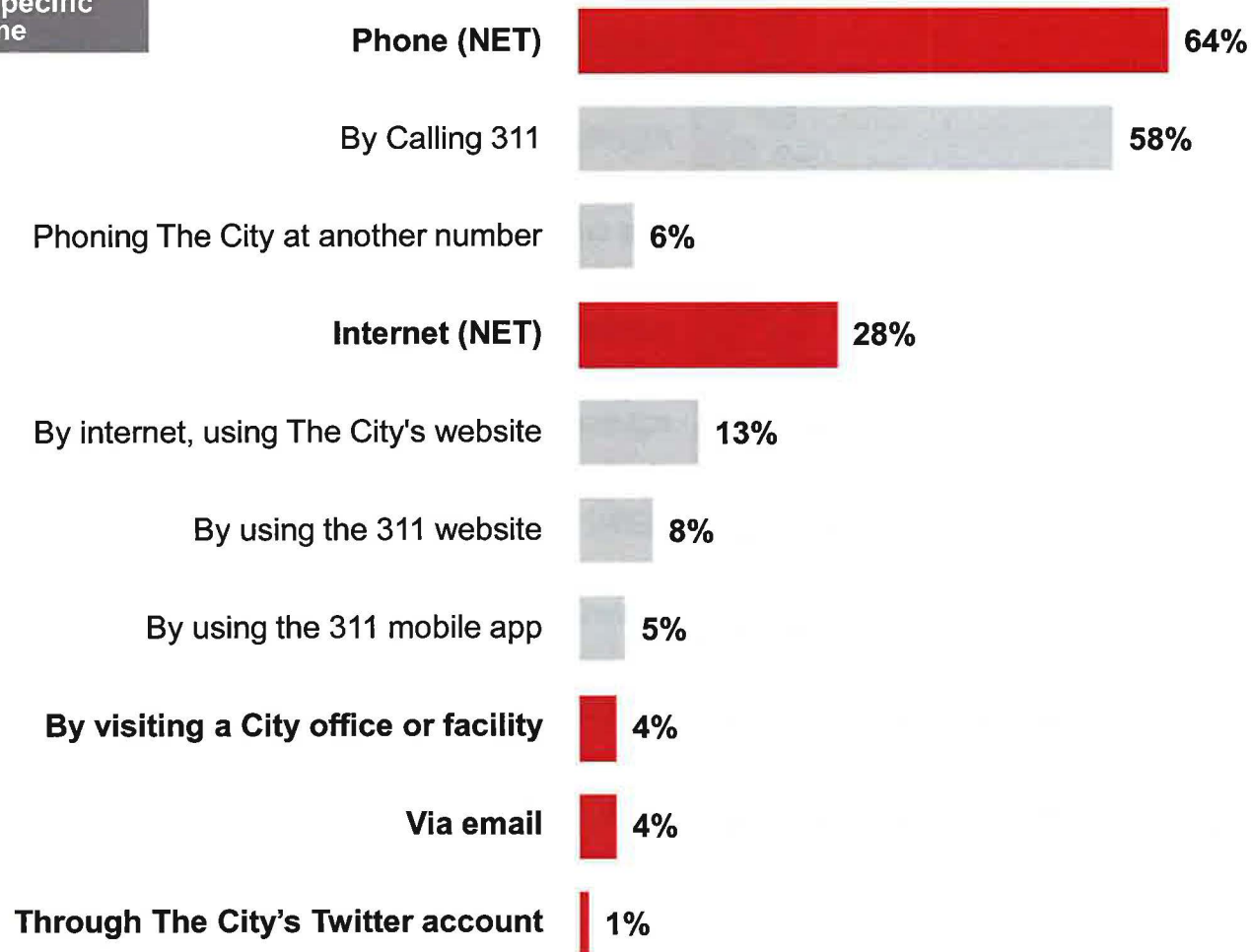
Base: 2016 to 2019: Valid respondents who contacted The City of Calgary in the last twelve months
 2006 to 2015: Valid respondents who contacted or dealt with The City of Calgary in the last 12 months

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



Preferred Method of Contact

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



New Question in Fall 2019: What is your preferred way of contacting The City?

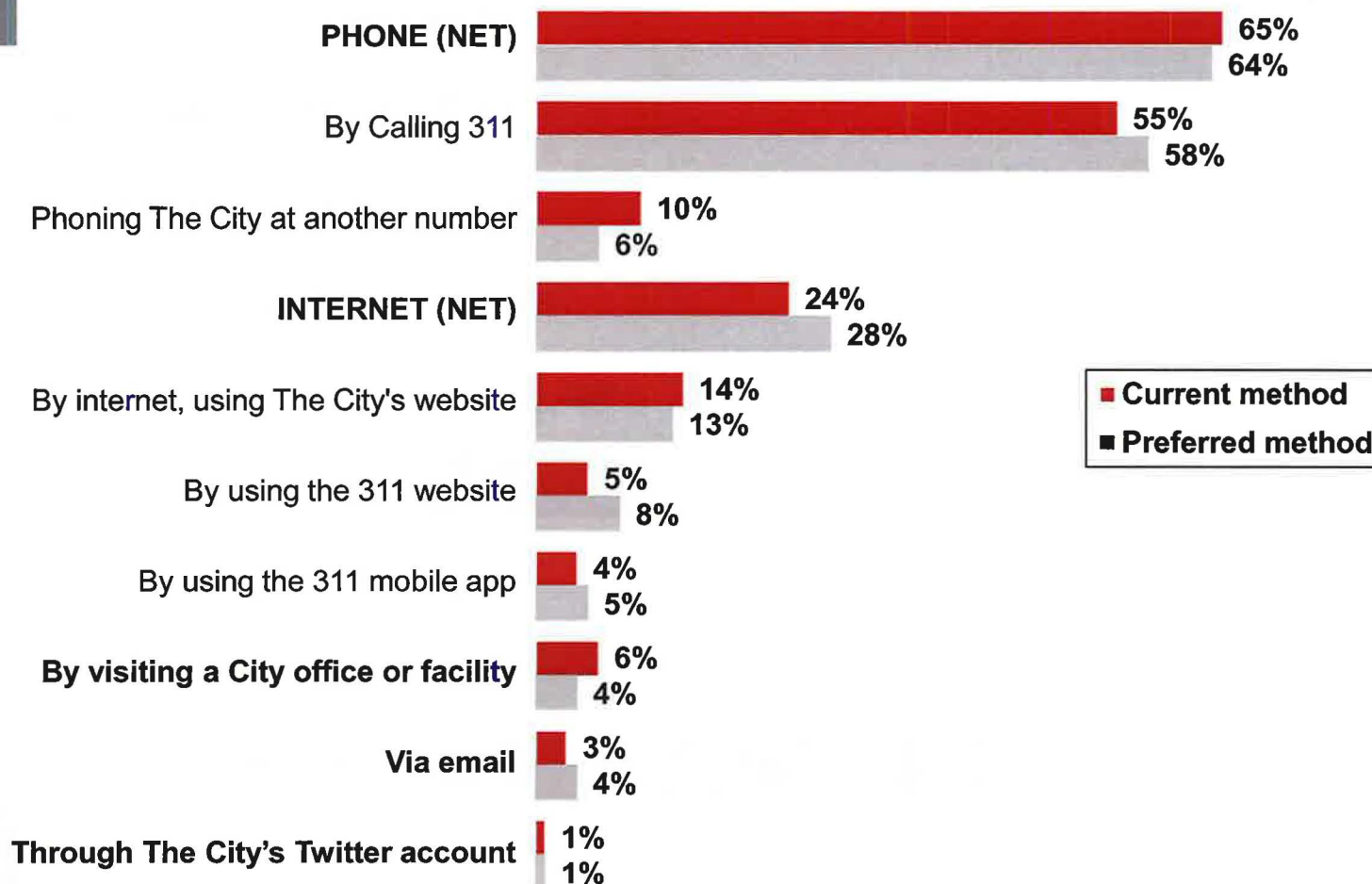
Base: Valid respondents who contacted The City in the last twelve months (n=1,080)

Mentions of <1% not shown



Current vs. Preferred Method of Contact

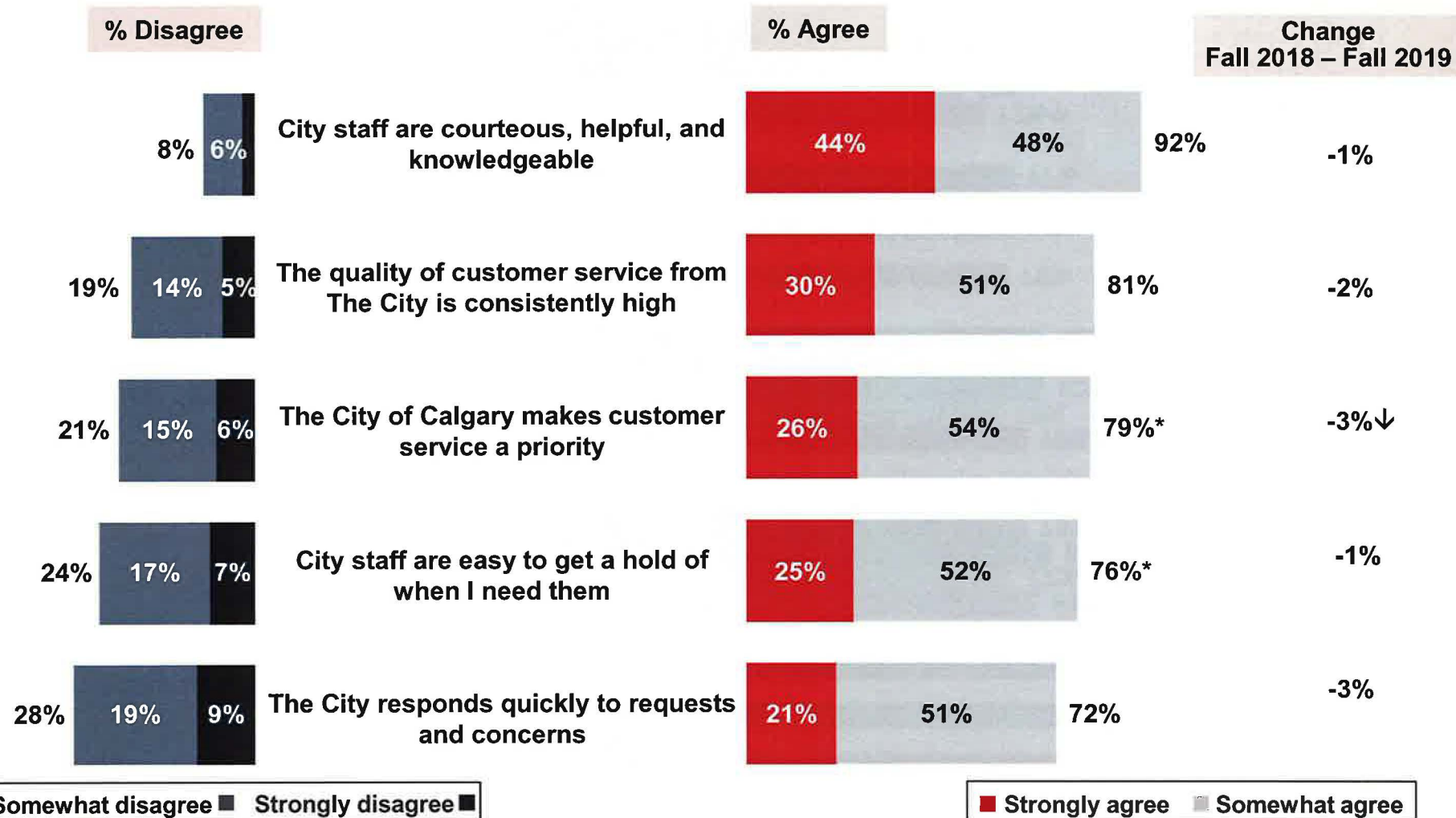
Note: A "NET" is a combination of 2 or more mentions that cover a specific theme



When you contacted The City was it... ? / What is your preferred way of contacting The City?

Base: Valid respondents who contacted The City in the last twelve months (n=1,075/n=1,080)

Attitudes Regarding Customer Service



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?

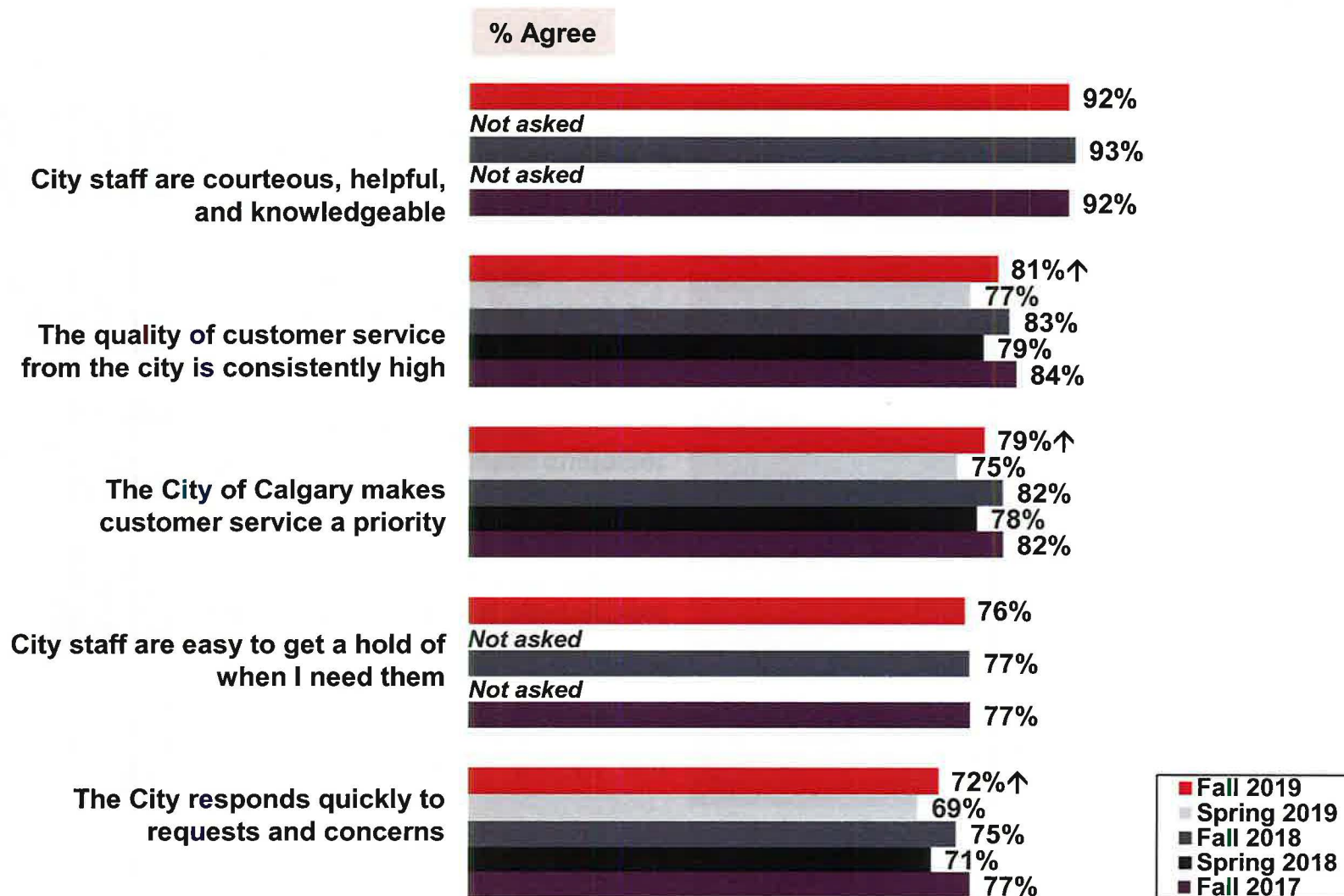
Base: Valid respondents (Bases vary)

*Rounding

↑ Statistically higher than Fall 2019
↓ Statistically lower than Fall 2019



Tracking Attitudes Regarding Customer Service



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)

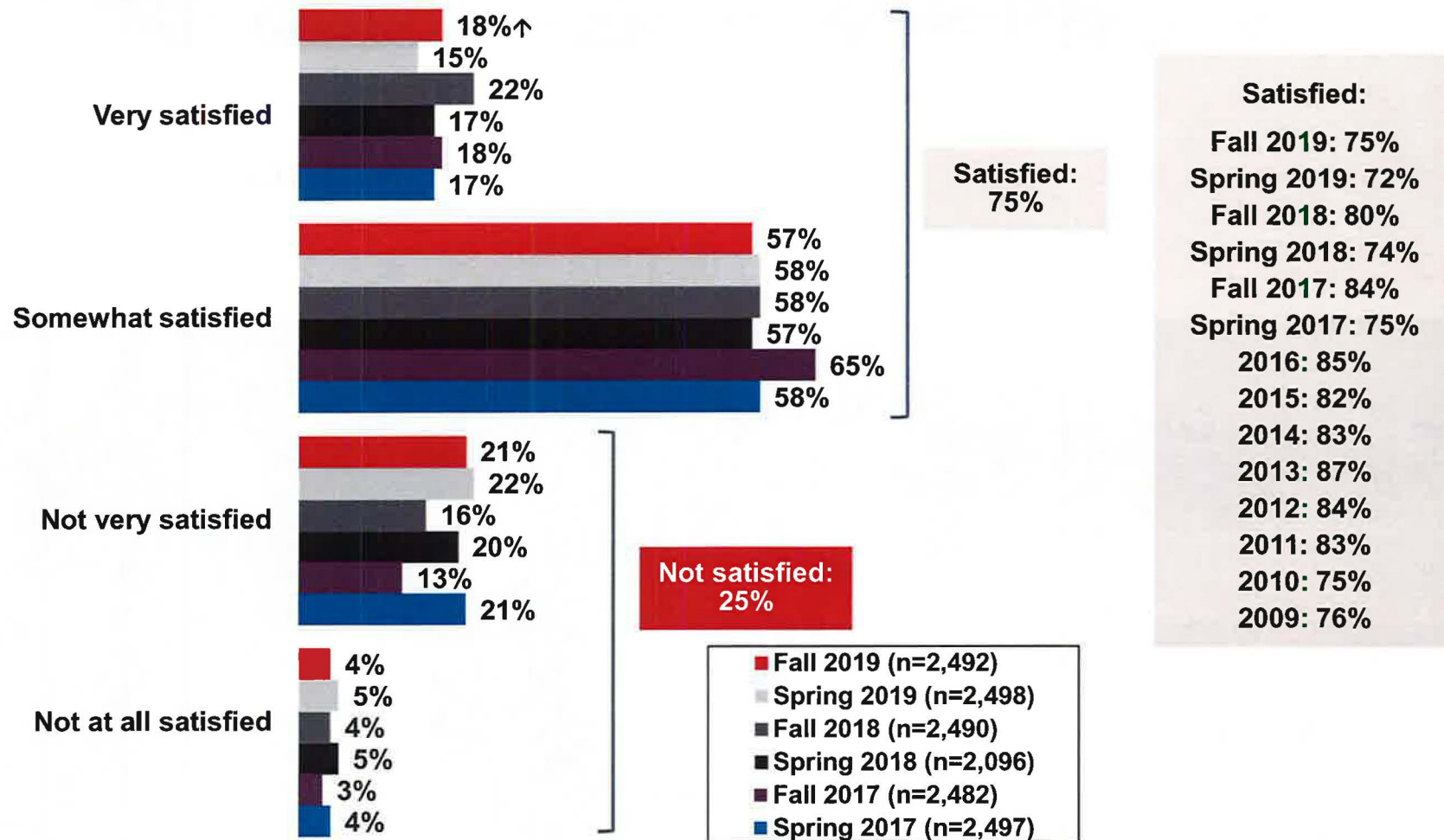
↑ Statistically higher than Spring 2019
 ↓ Statistically lower than Spring 2019



City Communications



Satisfaction with the Overall Quality of City Information and Communications

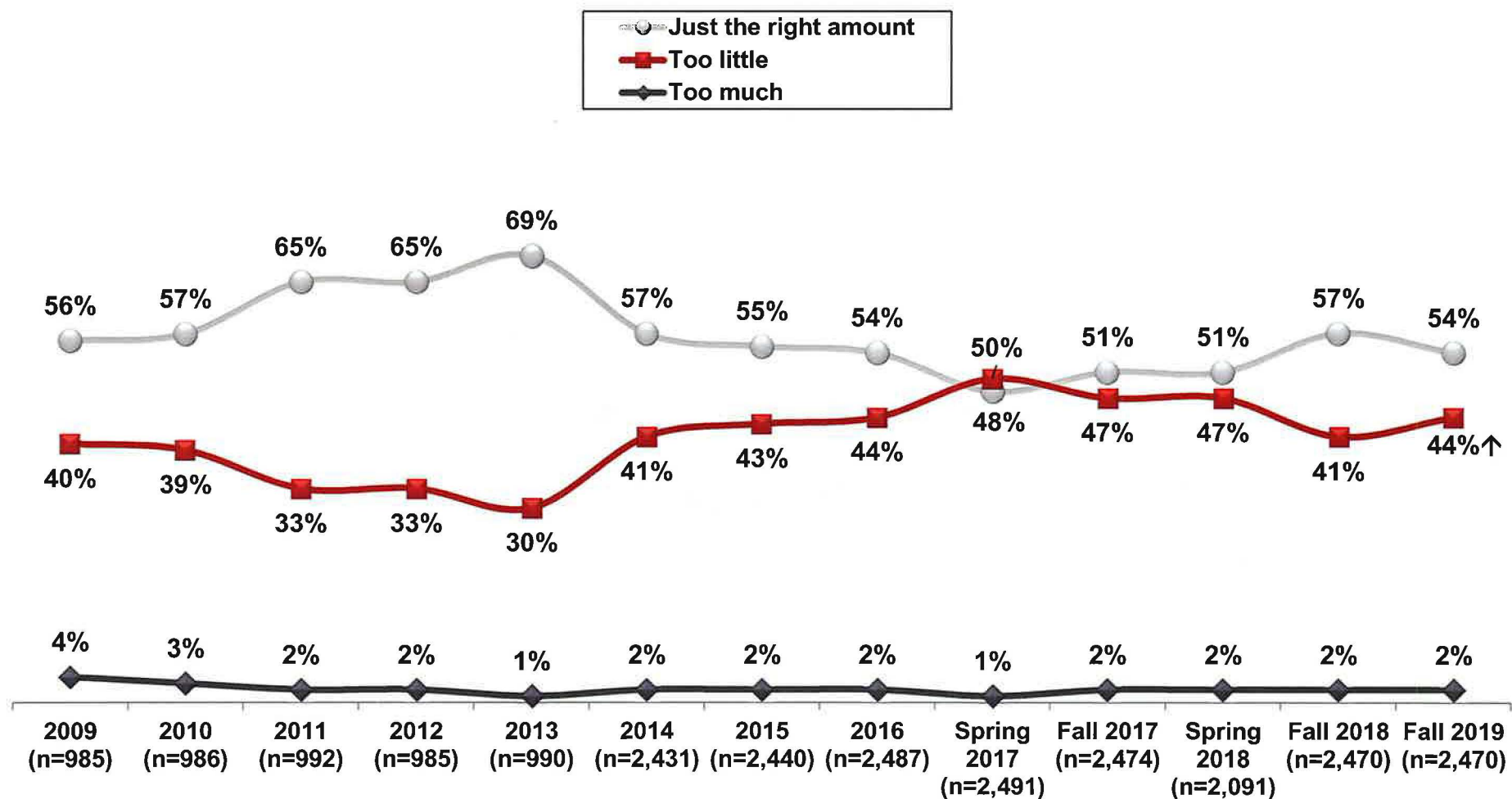


And how satisfied are you with the overall quality of City information and communications?

Base: Valid respondents

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

Amount of Accessible Information



Not asked in Spring 2019

In your opinion, do you currently have access to [prior to Spring 2018: receive] too much, too little, or just the right amount of information from The City?

Base: Valid respondents

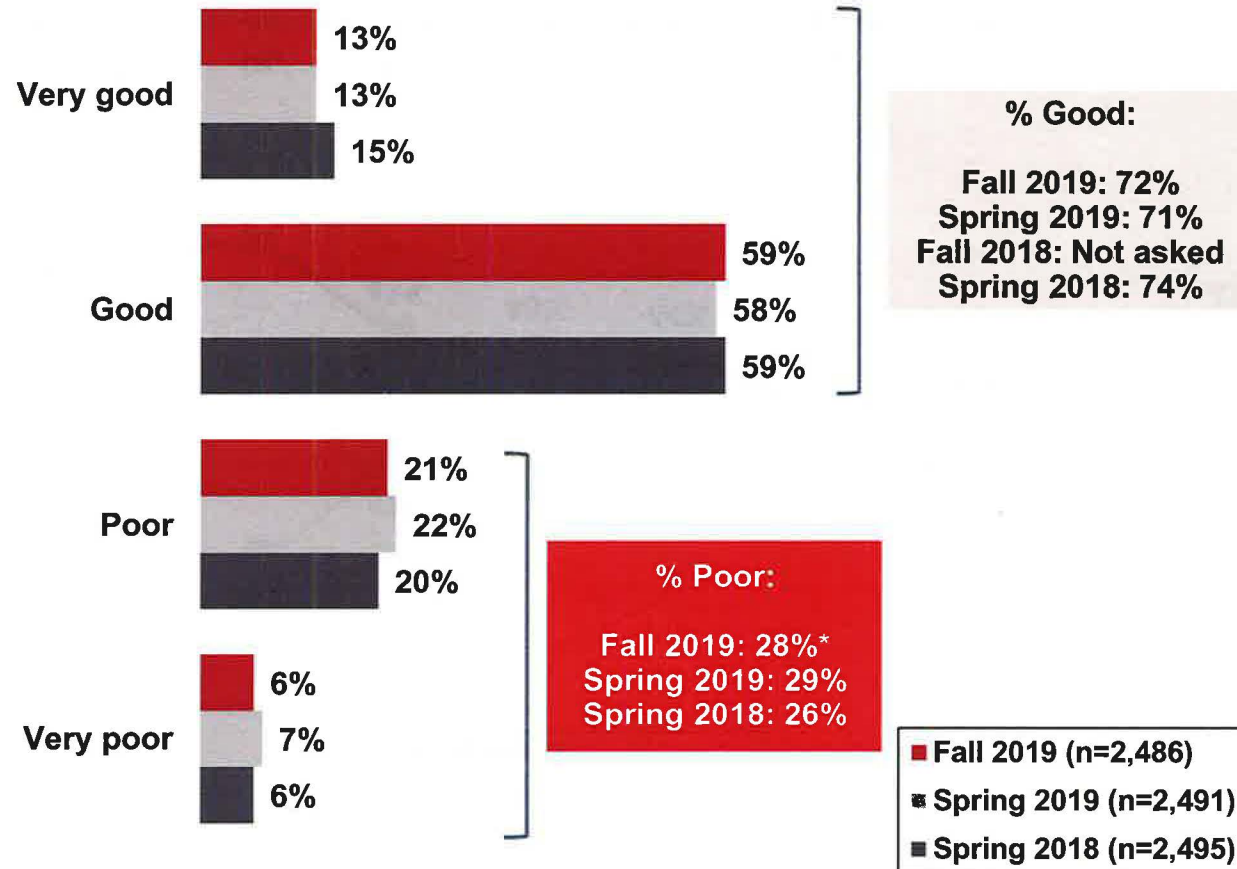
↑ Statistically higher than Fall 2018

↓ Statistically lower than Fall 2018



Not asked in Fall 2018. Not asked prior to Spring 2018.

Overall Communications from The City



Overall, how would you rate The City of Calgary in terms of how well it communicates with citizens about its services, programs, policies and plans in the past 6 months?

Base: Valid respondents

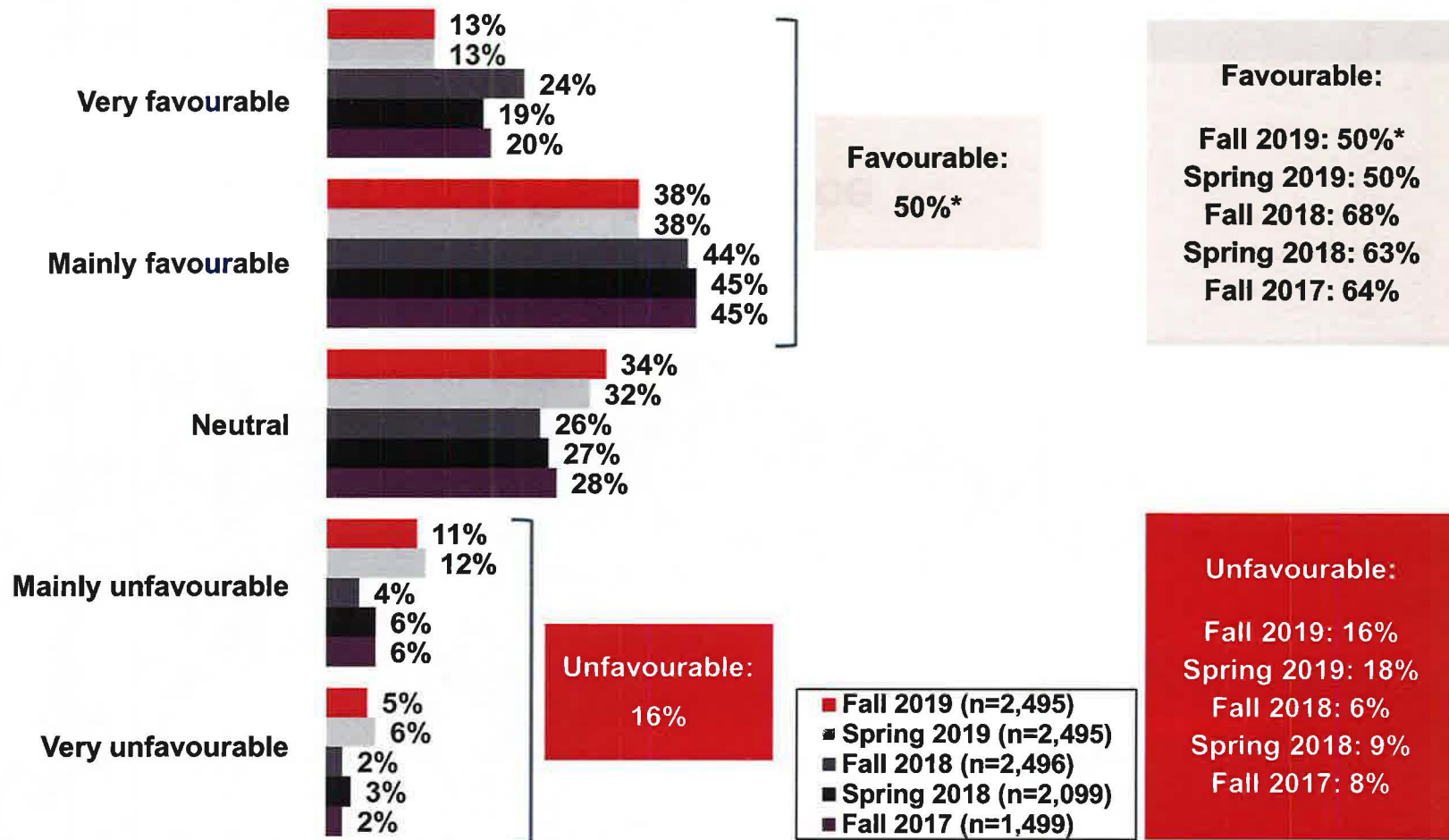
*Rounding



City Reputation and Performance



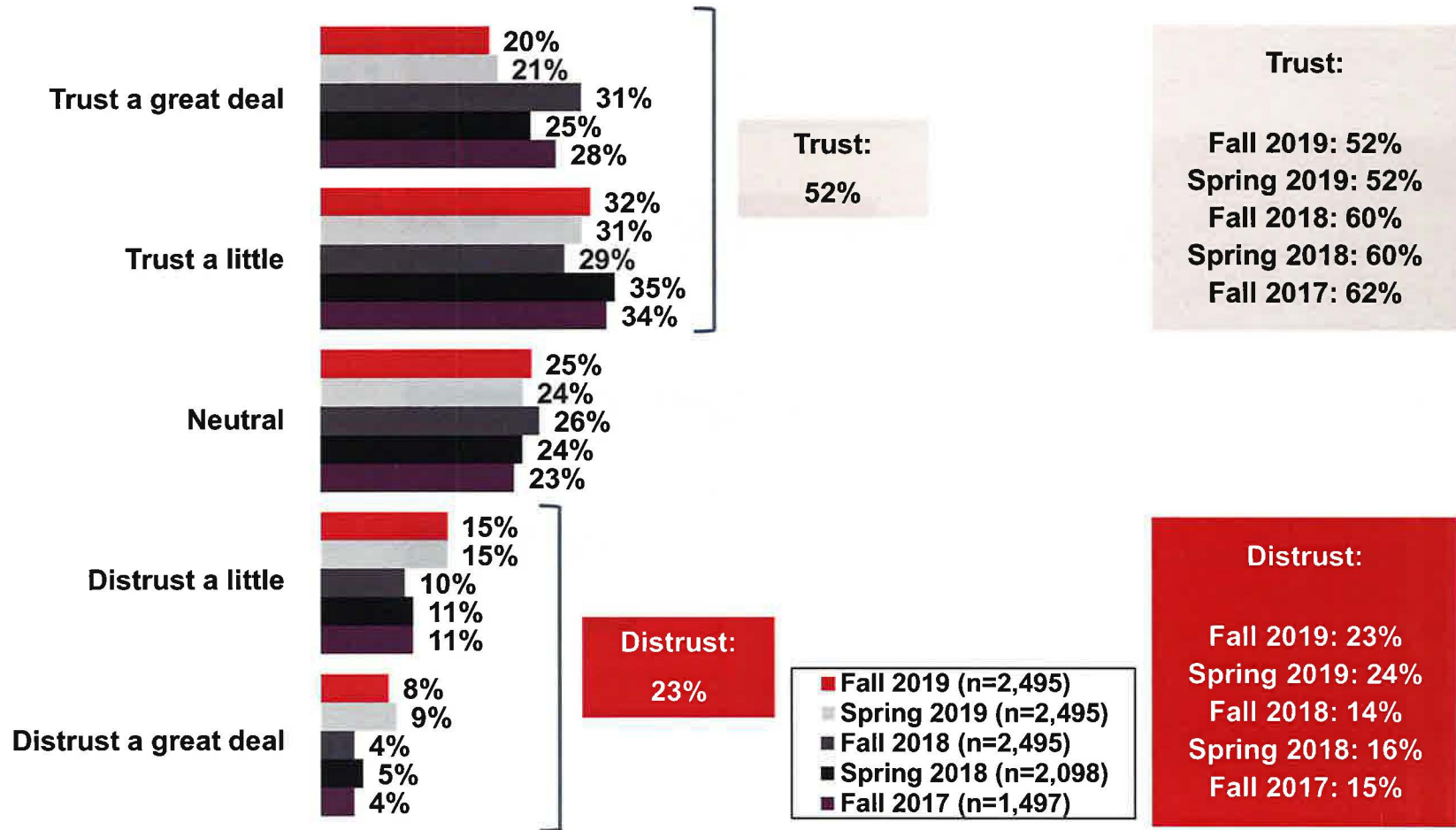
Favourability



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

Base: Valid respondents

*Rounding

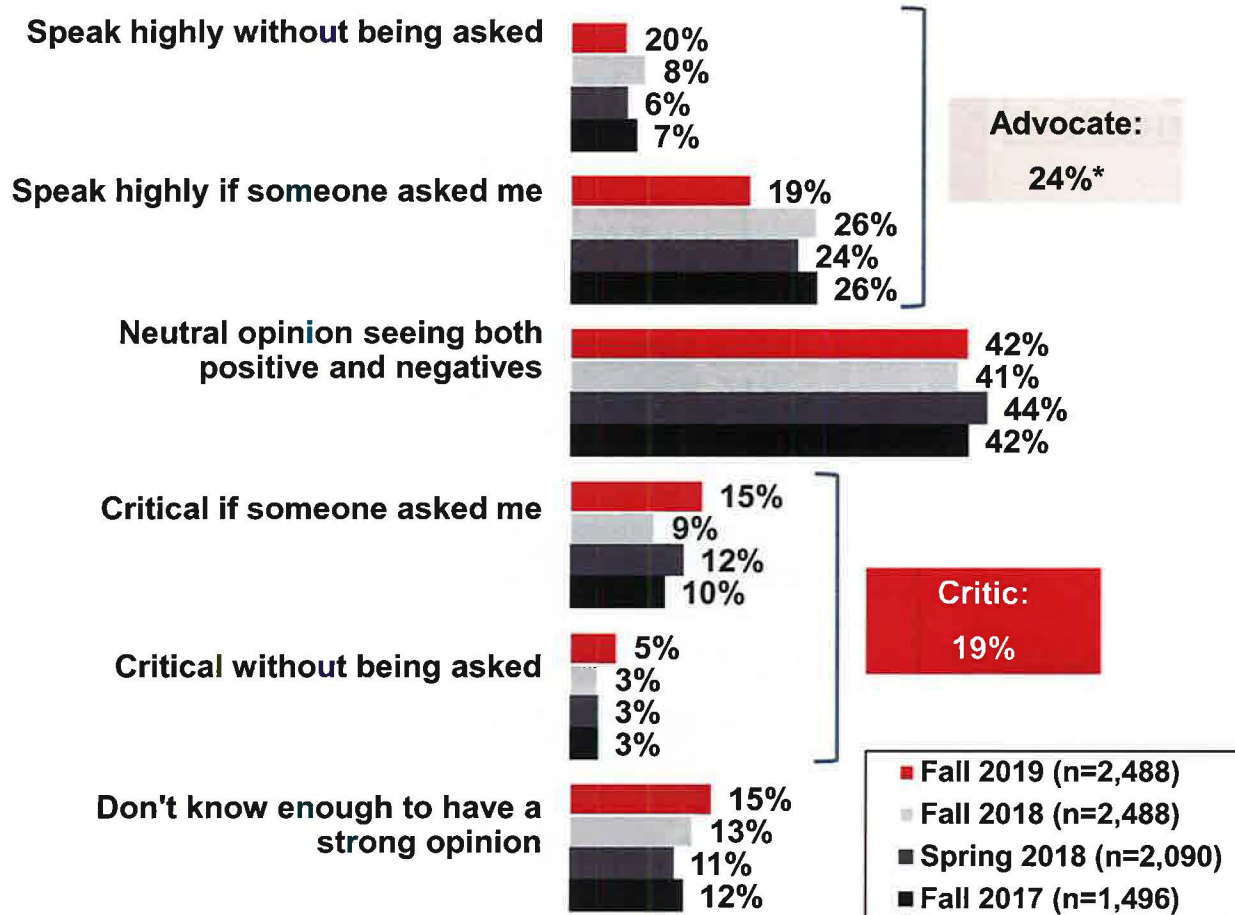


Again, taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

Base: Valid respondents



Advocacy



Advocate:

Fall 2019: 24%*↓
 Spring 2019: Not asked
 Fall 2018: 34%
 Spring 2018: 30%
 Fall 2017: 33%

Critic:

Fall 2019: 19%↑
 Spring 2019: Not asked
 Fall 2018: 12%
 Spring 2018: 15%
 Fall 2017: 13%

*Rounding

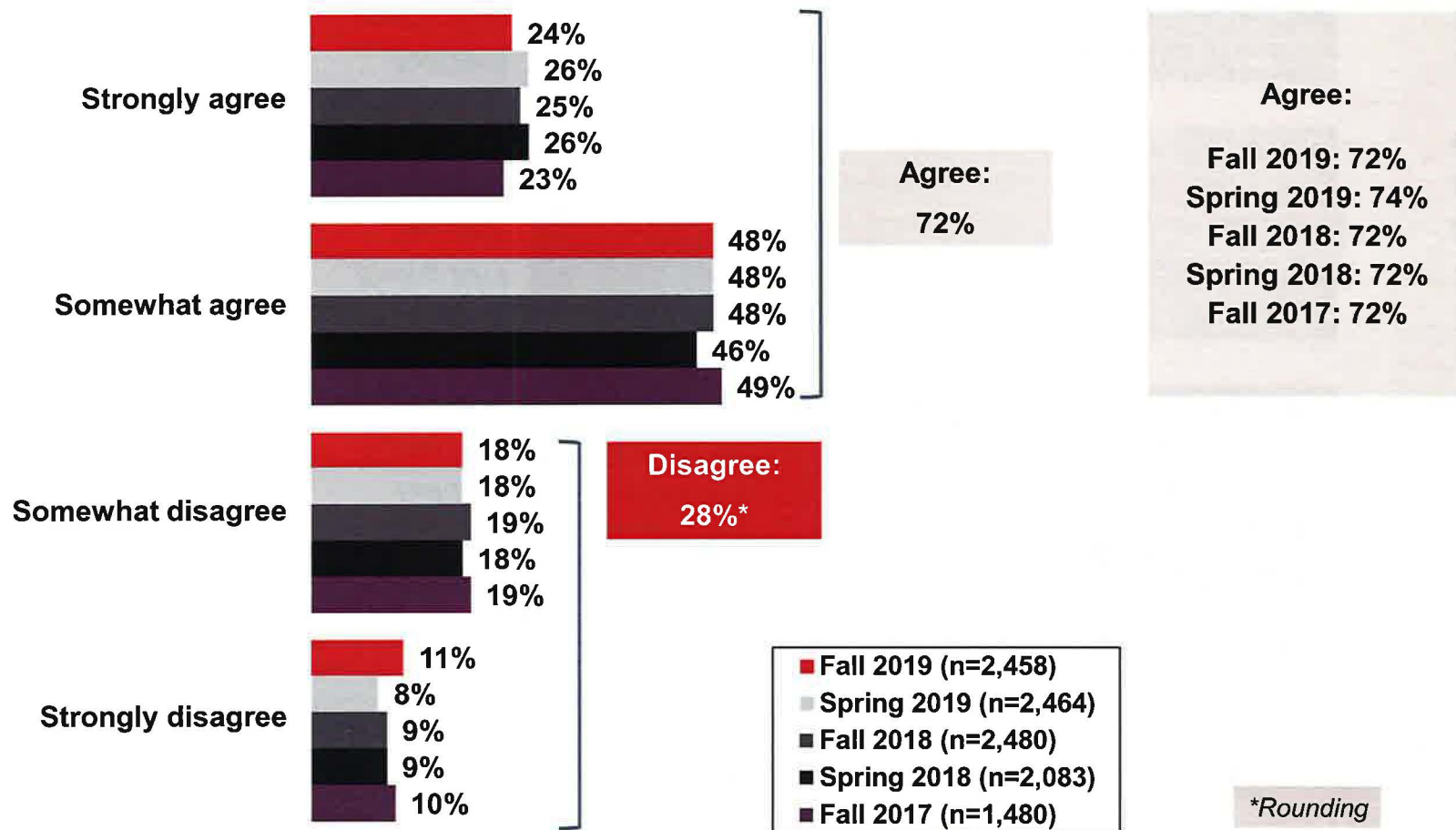
Which one of the following statements best reflects your overall opinion and perceptions of The City of Calgary?

Base: Valid respondents

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

Understanding of the Roles of City Council versus City Administration

I understand the roles and responsibilities of City Council compared to those of City Administration

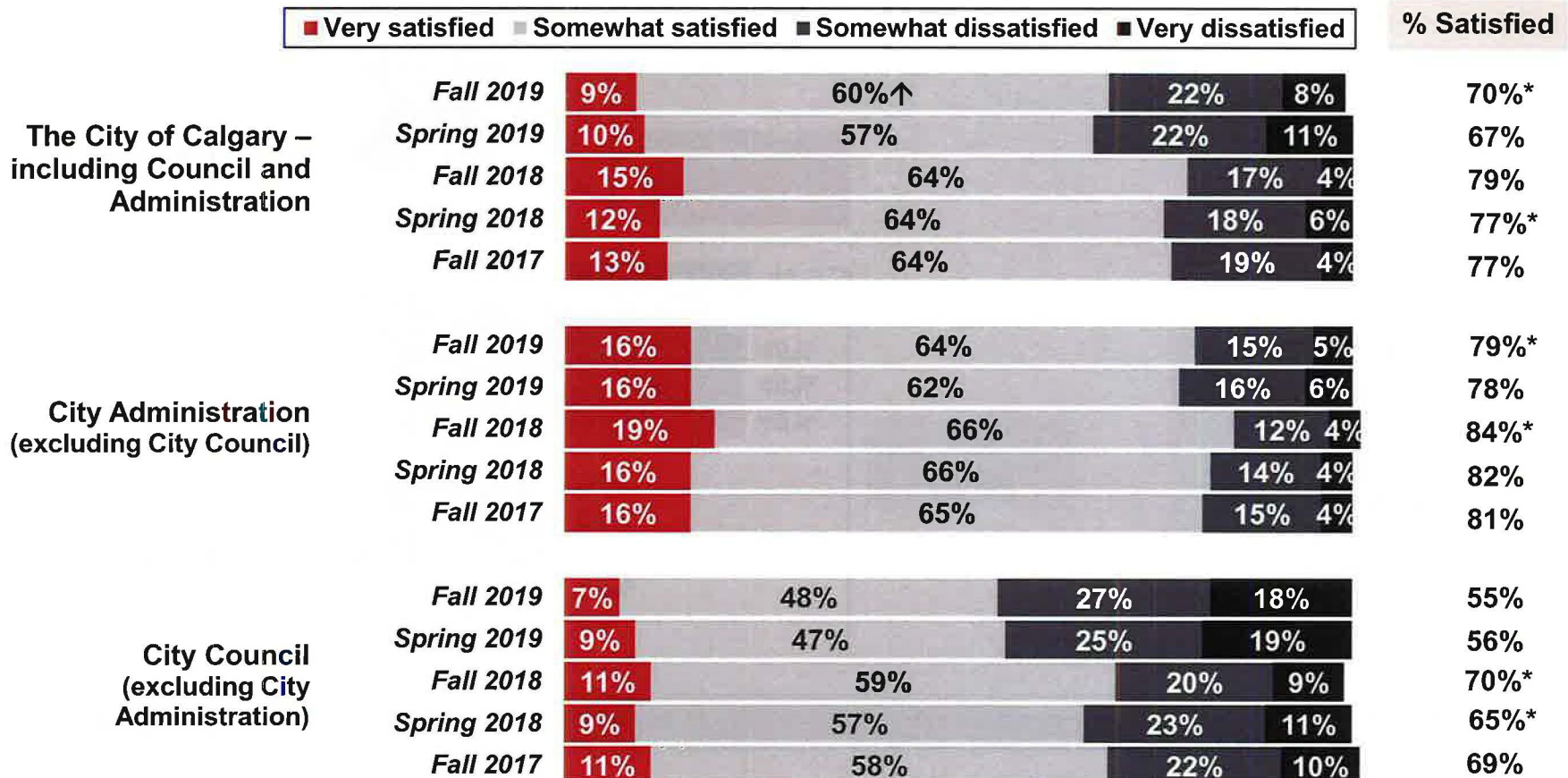


*Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement:
I understand the roles and responsibilities of City Council compared to those of City Administration.*

Base: Valid respondents

Perceptions About City Performance

As you may know, **City Council** is made up of elected officials who are the legislative body that govern The City. While **City Administration** is made up of non-elected employees at The City who are responsible for the management and running of local services. In other words, public servants who administer services, facilities, safety and infrastructure for communities.



Taking everything into account, how satisfied or dissatisfied are you with the way [INSERT] is going about running our City?

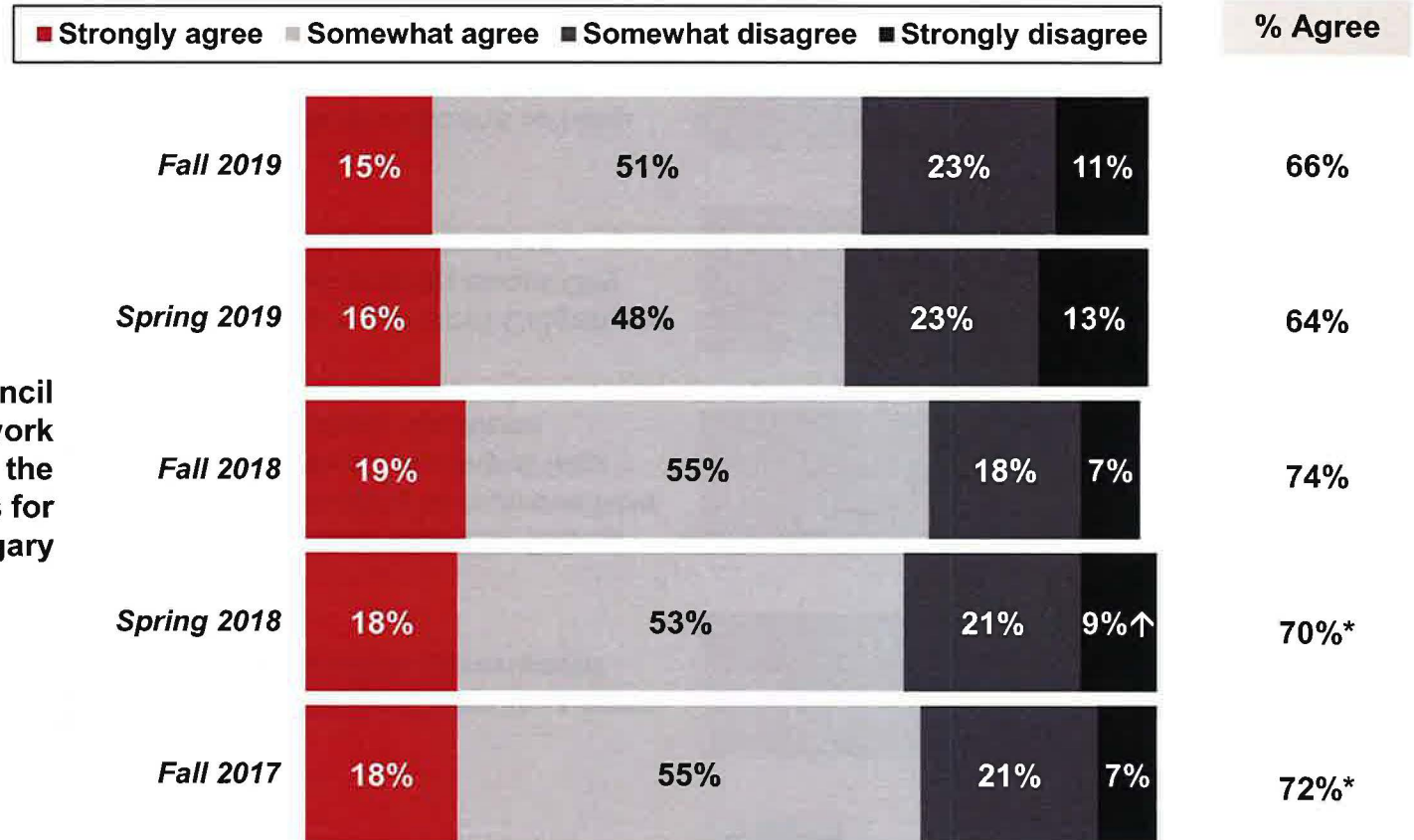
Base: Valid respondents (Bases vary)

*Rounding

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

Attitudes Regarding Collaboration

I believe that City Council and City Administration work collaboratively to make the best possible decisions for the future of Calgary



Please tell me whether you agree or disagree with each of the following statements?

Base: Valid respondents (Bases vary)

*Rounding

Perceptions of Transparency and Citizen Input



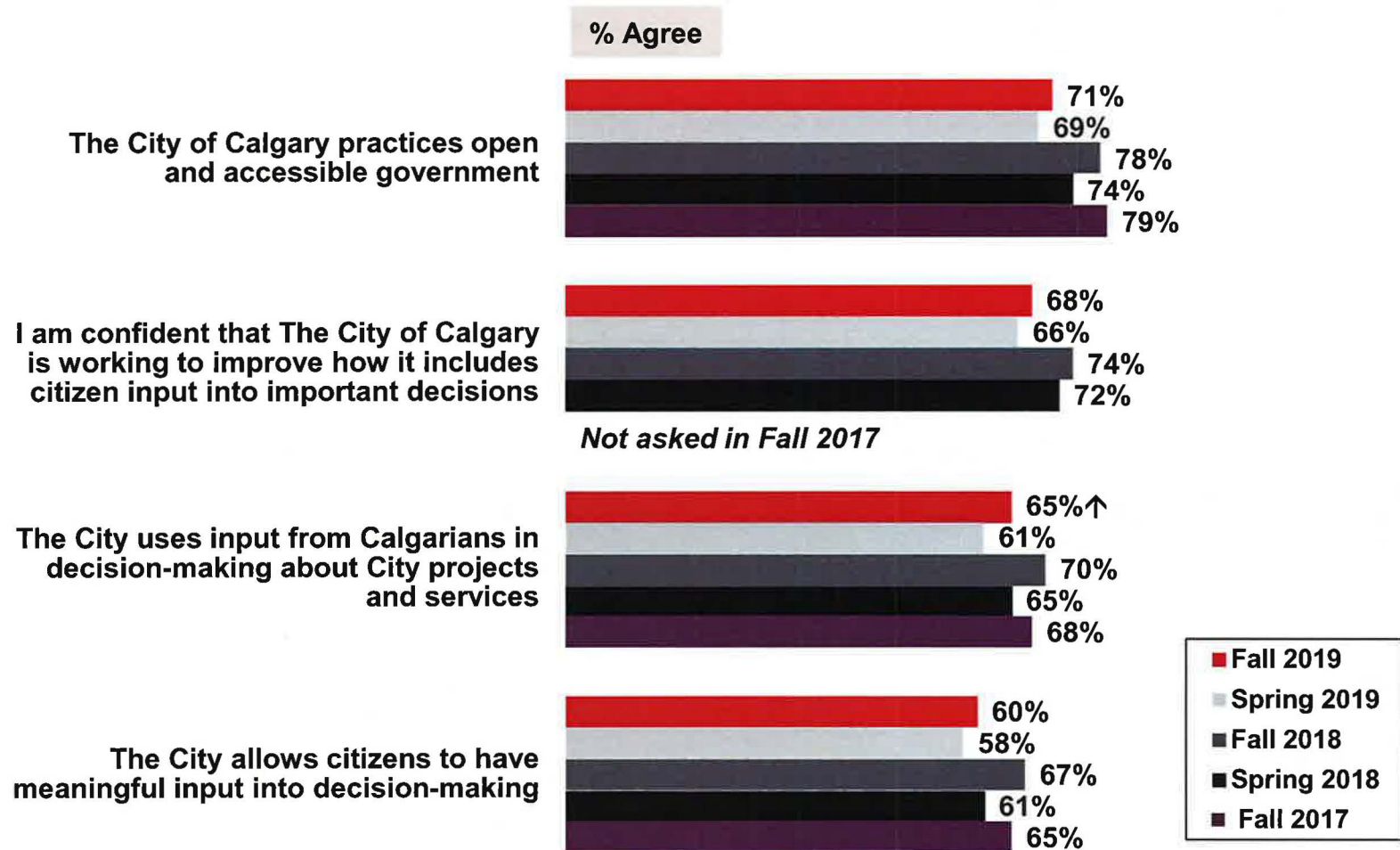
Thinking about your personal dealings with The City of Calgary, your general impressions and anything you may have read, seen or heard, please tell me whether you agree or disagree with each of the following statements about The City?

Base: Valid respondents (Bases vary)

*Rounding

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

Tracking Perceptions of Transparency and Citizen Input



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)

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



Respondent Profile





Demographics

Gender

Female	50%
Male	50%
Other	<1%

Quadrant

Southwest	28%
Southeast	24%
Northwest	28%
Northeast	20%

Education

Completed high school or less	16%
Some post secondary or completed a college diploma	35%
Completed university degree or post-grad degree	49%

Age

18 to 24	13%
25 to 34	21%
35 to 44	17%
45 to 54	19%
55 to 64	14%
65 or older	16%
Mean	45

Income

Less than \$30,000	6%
\$30,000 to <\$45,000	9%
\$45,000 to <\$60,000	11%
\$60,000 to <\$75,000	8%
\$75,000 to <\$90,000	8%
\$90,000 to <\$105,000	11%
\$105,000 to <\$120,000	11%
\$120,000 to <\$150,000	13%
\$150,000 or more	23%

Base: Valid respondents (Bases vary)

Household Characteristics

Type of Home

Single-detached house	70%
Apartment or apartment-style condominium	12%
Townhouse or rowhouse	8%
Duplex, triplex or fourplex	8%
Another type of multi-dwelling unit	1%

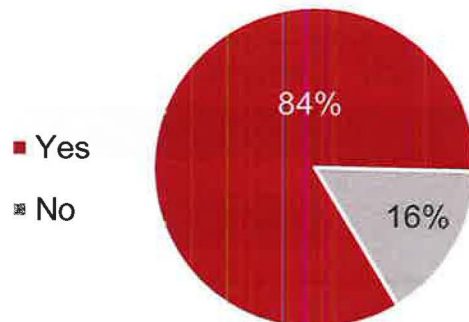
Children and Seniors in Household

Yes - Children	34%
Yes - Seniors	18%

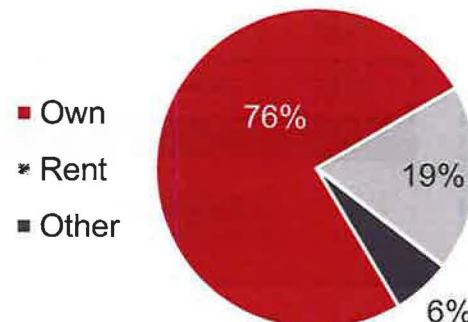
Household Size

1	14%
2	30%
3	19%
4	22%
5 or more	15%
Mean	3.0

Responsible for Property Taxes



Own or Rent



Tenure in Calgary

Less than 5 years	6%
5 to less than 10 years	9%
10 to less than 15 years	10%
15 to less than 20 years	11%
20 to less than 30 years	23%
30 to less than 40 years	16%
40 or more	25%
Mean	28

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=600)

Under the age of 12	29%
12 to 17	15%
18 or older	56%

Ethnic Background

Caucasian/ White	26%
British	18%
Canadian/ French Canadian	17%
Northern or Western European	12%
East or Southeast Asian	9%
Southern or Eastern European	7%
South Asian	7%
Central/ South American or Caribbean	3%
West Asian or Middle Eastern	3%
African	3%
Aboriginal/ First Nations/ Metis	2%

Disability

Yes	17%
No	83%

Visible Minority

Yes	24%
No	76%

Base: Valid respondents (Bases vary)



Calgary



Contact

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