

Fall 2020 Research Results

RECOMMENDATION(S):

Release on: 2020 November 09

That Council receive this report and attachments for the Corporate record and Council discussion.

HIGHLIGHTS

- The City has completed its annual Fall Citizen Satisfaction and Quality of Life telephone survey with Calgarians. These results, coupled with additional research conducted with citizens over the past year, provide Council with a barometer of citizens' opinions on a variety of aspects of The City, including satisfaction with services, The City's performance as well as citizen beliefs and concerns related to the COVID-19 pandemic.
- What does this mean to Calgarians? This means that citizens have had an opportunity to provide statistically representative feedback to The City that will be considered by Council and Administration in decision-making.
- Why does it matter? When making decisions on municipal matters, the opinions and priorities of the general population can be an important consideration. In addition, performance-related responses provide The City with an opportunity to identify strengths as well as opportunities for improvement.
- Trust in The City is the lowest level seen since tracking began in Fall 2017.
- Satisfaction with the overall level and quality of City services and programs is declining.
- Advanced analytics indicate that the top services in which to invest more over the next three years are 9-1-1, Calgary Police Service, affordable housing for low-income Calgarians, and the Calgary Fire Department.
- Young adults tend to be more positive about Calgary and the future for the city than any other age group.
- Most recent Council Direction: Not applicable
- Strategic Alignment to Council's Citizen Priorities: A well-run city
- Background and Methodologies are included as Attachment 1.

DISCUSSION

- Summary of Findings: *2020 Fall Quality of Life and Citizen Satisfaction Survey*
 - Perceptions about the quality of life in Calgary remain strong, identical to Spring 2020, but down from Fall 2019.
 - *Infrastructure, traffic and roads* continues to lead the issue agenda, although has notably decreased in prominence since Fall 2019. *Crime, safety and policing* is the second ranked issue.
 - Two-thirds of residents are satisfied with the overall level and quality of City services and programs, down from Spring 2020 and Fall 2019.
 - The perceived value of property tax dollars has remained stable over the past year.
 - Satisfaction with The City's customer service remains strong.
 - Perceptions of City communications as 'good' have increased, as have ratings of having access to the 'right' amount of information.

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- 'Trust' in The City in Fall 2020 is significantly lower than all previous waves.
- Satisfaction with Administration's performance remains strong and is consistent with results one year ago; perceptions related to Council's performance are also similar to results in Fall 2019, though down from Spring 2020 which had seen a boost.
- Summary of Findings: *Calgary Attitudes & Outlook Survey*
 - Young adult Calgarians, aged 18-24, tend to be more positive about Calgary and the future of the city than other age groups. Those aged 25-34 hold similar views in many respects. However those aged 35-54 are generally the most negative of all age categories.
 - While a higher proportion of young adults rate Calgary as 'expensive' vs. 'inexpensive', they are less likely to feel Calgary is 'expensive' than those 25+.
 - Young adults (52%) are less likely to view Calgary as 'inclusive' in comparison to those aged 25 or older (63%).
 - Young adults, aged 18-24, (82%) are more likely than those aged 25+ (68%) to feel that Calgary needs to address racism and discrimination.
 - Young adults, aged 18-24, (86%) are more concerned about climate change than all other age groups (69%).
 - Young adults are statistically less likely (73%) than are those aged 25 and older (85%) to remain in Calgary in the next five years.
 - Calgarians aged 18-24 are more supportive of most large infrastructure projects than those aged 25+.
 - Young adults feel that the primary initiatives to make Calgary a more vibrant place to live involve arts and culture, transit, and the economy.
 - Though young adults agree that Calgary offers enough opportunity for post-secondary education (80%), only 43% feel there is enough opportunity for employment. Even so, young adults are more likely than those 25+ to rate Calgary's 'affordability' and 'employment opportunities' as 'good'.
- Summary of Findings: *Service Investment Survey*
 - To establish a clear understanding of the City services that Calgarians believe would be the most important for The City of Calgary to invest in over the next three years, a MaxDiff statistical analysis, which involves a trade-off analysis, was performed.
 - This analysis involves presenting respondents with a series of questions, in which each question contains a list of alternatives. Respondents are asked which alternative they believe would be the most important (*best*) and which would be the least important (*worst*) for The City to invest in over the next three years. The combinations of items are designed very carefully by a professional Data Analyst with the goal that each item is shown an equal number of times, and pairs of items are shown an equal number of times. As the outcome, a relative ranking for each option is calculated.
 - The 16 services tested were selected because they are at least partly funded by property tax dollars and generally receive the largest share of an average household's property tax.
 - The analysis indicates that the top services in which to invest more over the next three years are 9-1-1, Calgary Police Service, affordable housing for low-income Calgarians, and the Calgary Fire Department.

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- Summary of Findings: *COVID-19 Snapshot #6*
 - 86% are satisfied with The City's response to the COVID-19 pandemic
 - 75% believe we are using the right amount of caution to open City services.
 - 86% support the Face Coverings Bylaw
 - 28% believe the worst of the pandemic is behind us
 - The majority (61%) of Calgarians continue to prefer government decision-makers balance public health and the economy equally when re-opening the economy. One quarter (28%) prioritize public health while 11% prioritize the economy.
- Stakeholders consulted on the Corporate Research Team's research activities over the past three (3) months include the City Manager, the Chief Financial Officer, the Director of Customer Service & Communications (CSC), Corporate Initiatives/One Calgary, Emergency Operations Centre (EOC), and the COVID-19 Governance Committees.

STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)

- Public Engagement was undertaken
- Public Communication or Engagement was not required
- Public/Stakeholders were informed
- Stakeholder dialogue/relations were undertaken

Research and Engagement are both used by The City to gather input from citizens, customers, employees and other stakeholders. Each has its own methodologies and depending on the objectives of the project, either research or engagement may be the best way to collect the information required. In some cases both are used to get a broader picture of the perceptions and opinions of the targeted group.

Public engagement was not conducted in advance of the research presented in this report. Though the results of these surveys will be communicated to citizens, public communication did not take place prior to conducting the survey, as the methodology employed was random digit dialing (telephone survey of random Calgary-based cell phone and landline phone numbers) or established online panels. Citizens cannot self-select to participate in these surveys.

IMPLICATIONS

Social

- The research conducted is weighted to be representative of the Calgary's population on the whole, ensuring an equitable distribution of responses according to age, gender and quadrant of residence. In addition, demographic questions are asked to ensure that the data can be viewed with a lens for specific sub-groups.
- Results related to the Social Wellbeing Policy included in this presentation are safety, mental health and diversity/inclusion.

Environmental

- Findings from the various surveys presented include results related to the environment in Calgary and public opinion regarding climate change.

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Economic

- The findings presented serve to inform Council and contribute to decision-making on a number of economic-related topics including citizens' priorities such as budget & taxes.

Service and Financial Implications

- No anticipated financial impact

RISK

- Listening to Calgarians and better understanding their needs, values, attitudes, and aspirations is critical, especially when considering the Well-Run City Council Directive which highlights that listening to citizen feedback and using it in the decision-making process is key to improving city programs, services, and quality of life. The plan highlights the provision of safe, fair and accessible opportunities for citizens to give meaningful and actionable insights to inform city decision-making, mitigate risks, and drive continuous improvement. By sharing these results publicly, The City is transparent and accountable to citizens for their performance on the measures within.
- The findings from the Fall 2020 research provide insights into citizens' perspectives on many issues and challenges facing Calgarians every day. Ensuring that citizens' views and perspectives are incorporated into City decisions strengthens sentiments of trust and transparency for The City.

ATTACHMENT(S)

1. Fall 2020 Research Results – Standardized Attachment
2. Fall 2020 Research Results – Council Presentation
3. Fall 2020 Quality of Life and Citizen Satisfaction Survey Report
4. Calgary Attitudes and Outlook Survey Report
5. 2020 Service Investment Survey Report
6. COVID-19 Snapshot #6 Report

Department Circulation

General Manager (Name)	Department	Approve/Consult/Inform (Pick-one)
Carla Male	CFOD	Approve
David Duckworth	CMO	Consult
Executive Leadership Team	ELT	Inform