



2021 Spring Research Results

Combined Meeting of Council

2021 May 10

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Report #C2021 - 0671
Attachment #2
ISC: Unrestricted



2021 Spring Research

2021 Spring Pulse Survey

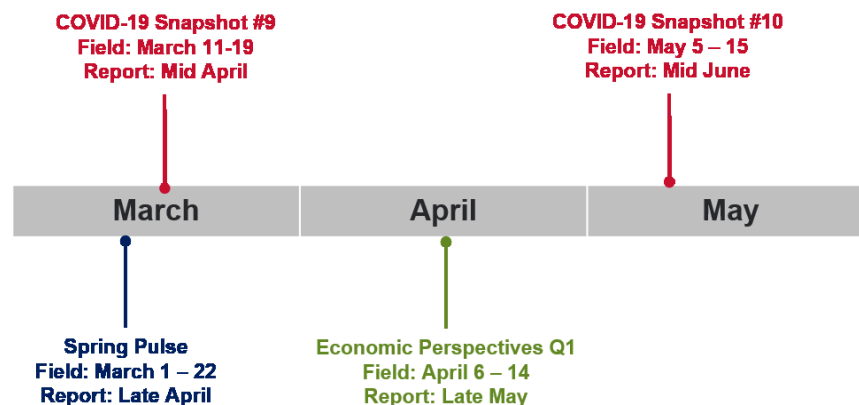
- This survey is an important tool in understanding citizens' overall perceptions of, and satisfaction with, The City of Calgary. Topics include: Quality of life in Calgary, top issues facing the city, City programs and services, value of taxes, City reputation, and City performance.

2021 Economic Perspectives Survey (Q1)

- This survey measures citizens' perceptions about the current economy, quality of life, and other aspects of the economy as well as perspectives on City infrastructure spending.

COVID-19 Snapshots

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



2021 Spring Pulse Survey

- Telephone survey n=2,500
- March 1 – 22, 2021
- Topics include: Quality of life in Calgary, top issues facing the city, satisfaction levels with a range of City services, value of taxes, City reputation and performance.

Economic Perspectives 2021 Q1

- Telephone survey n=500
- April 6 – 14, 2021
- Topics include: State of the current economy, economic outlook, quality of life, and perspectives on City infrastructure spending.

COVID-19 Snapshot #9 Survey

- Telephone survey n=500
- March 11 – 19, 2021
- Topics include: Opinions, beliefs, and concerns about the COVID-19 pandemic.

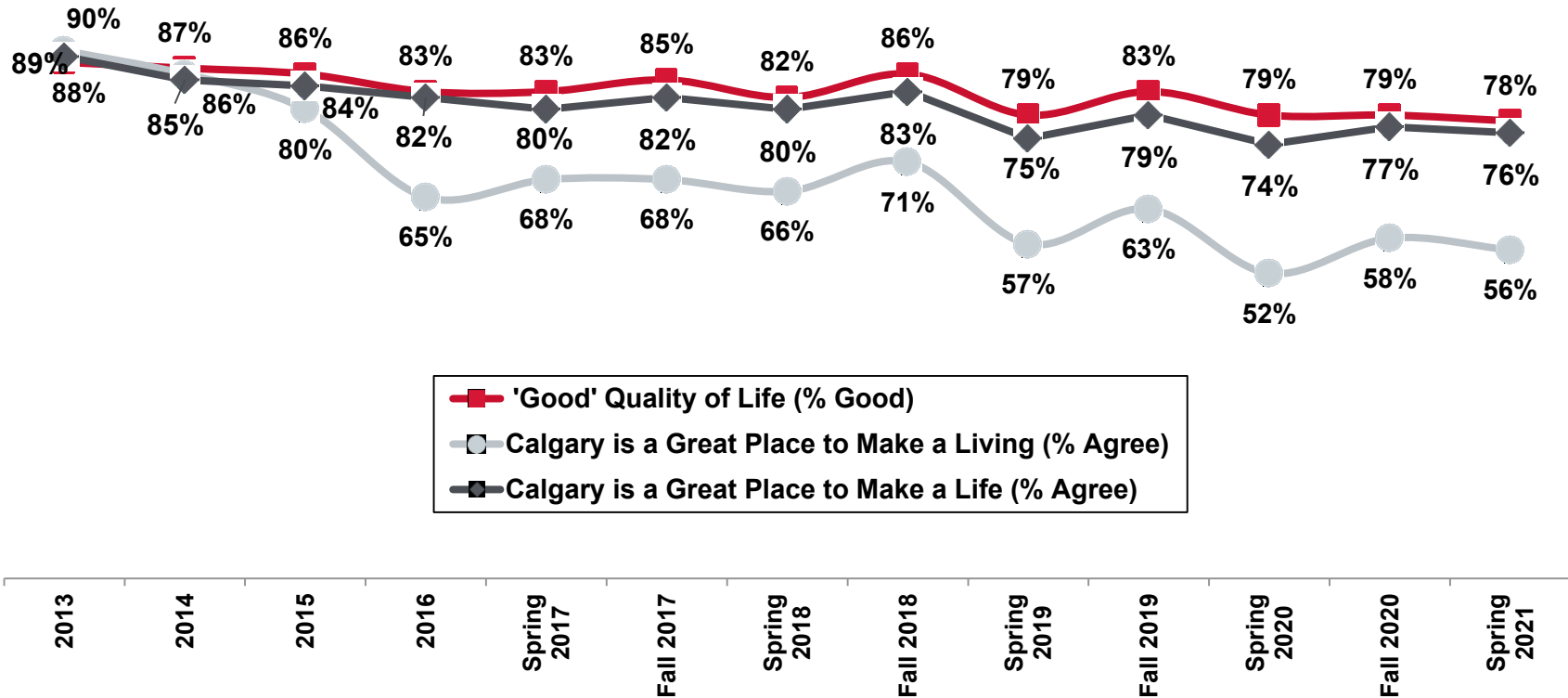


Quality of Life



Quality of Life in Calgary

% Agree | % Good



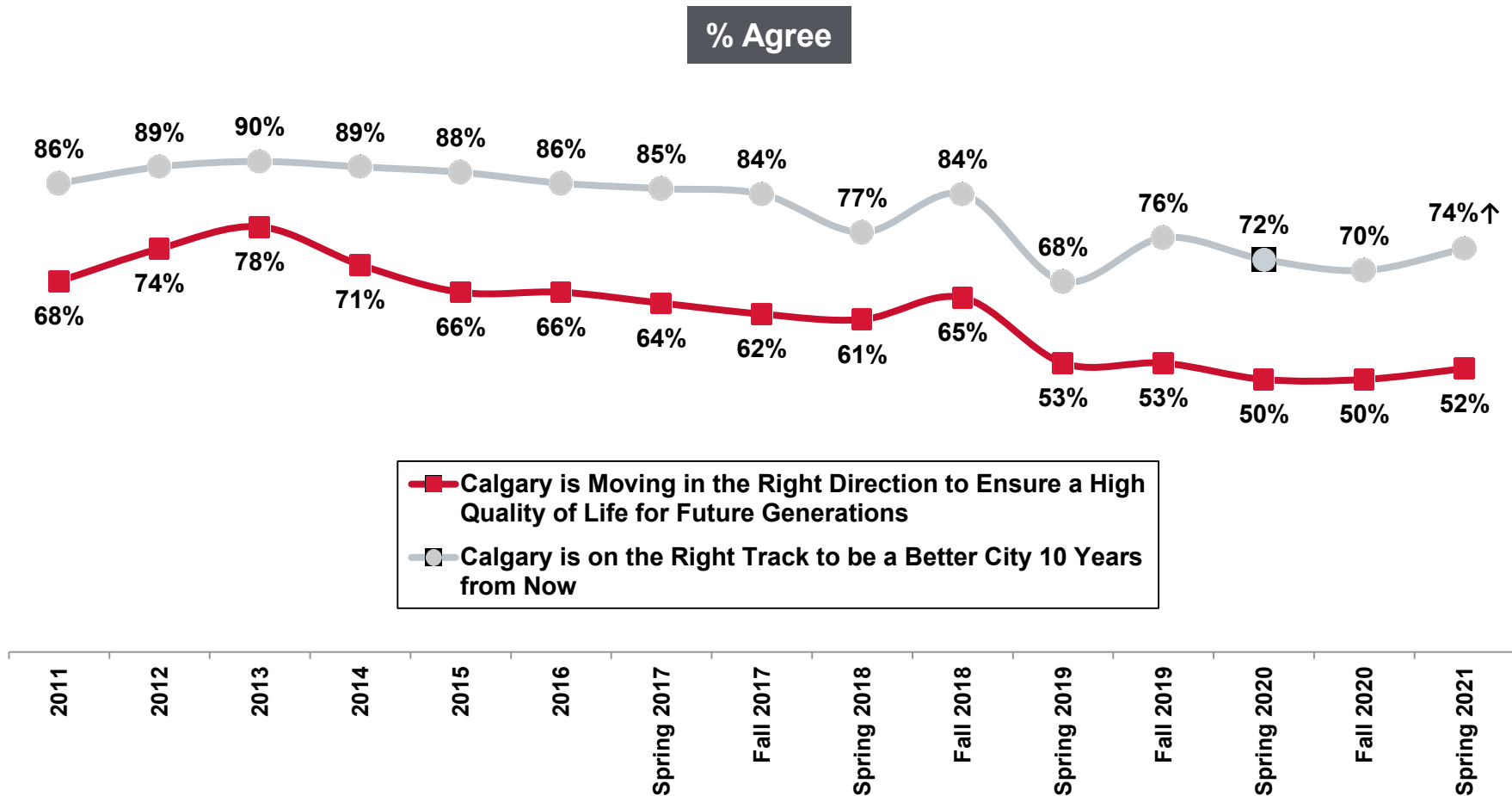
■ 'Good' Quality of Life (% Good)
● Calgary is a Great Place to Make a Living (% Agree)
■ Calgary is a Great Place to Make a Life (% Agree)

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? | 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)
 Source: 2021 Spring Pulse Survey



The Future of Calgary



■ Calgary is Moving in the Right Direction to Ensure a High Quality of Life for Future Generations
● Calgary is on the Right Track to be a Better City 10 Years from Now

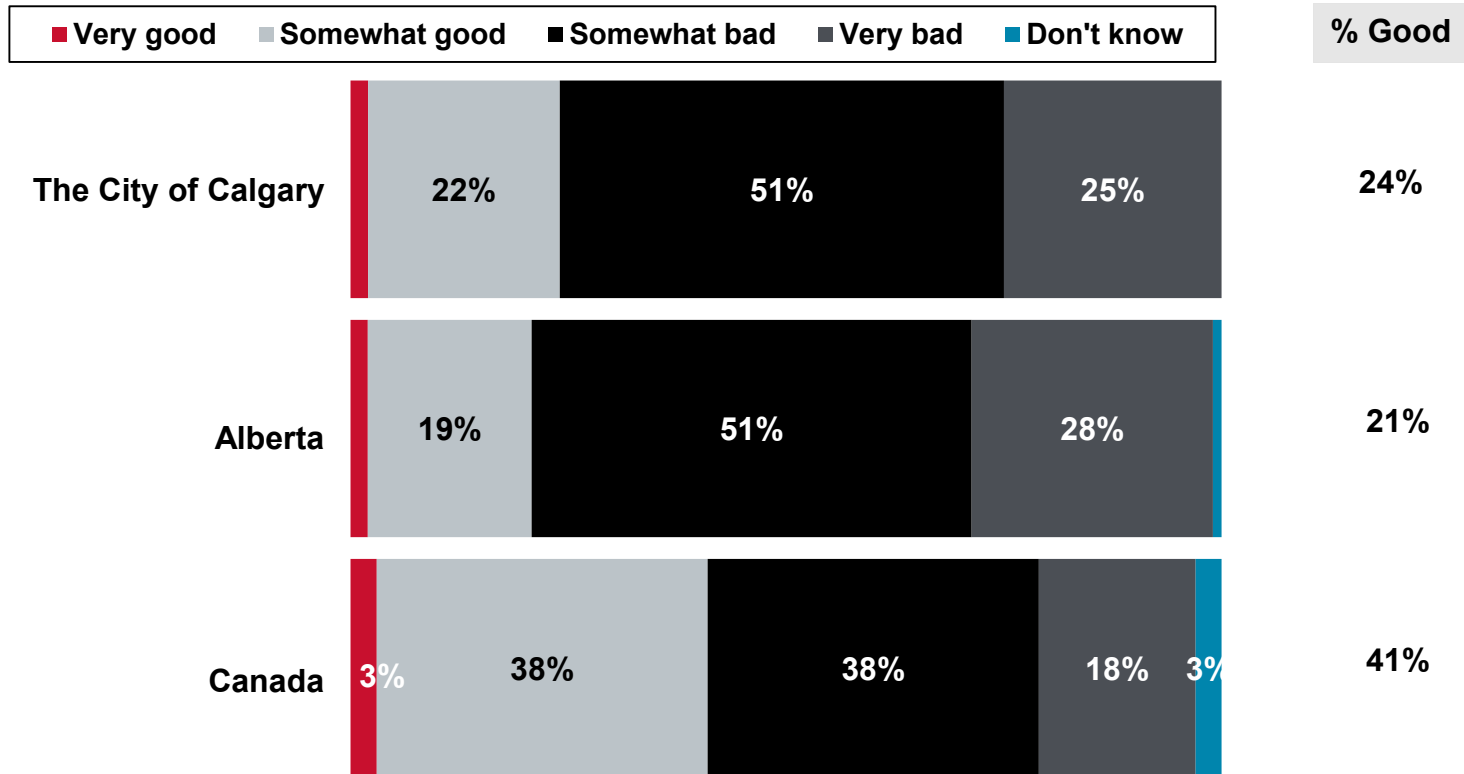
Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree." | Please indicate whether you agree or disagree with the following statement about Calgary's future.

Base: Valid respondents (Bases vary)
Source: 2021 Spring Pulse Survey

↑ Statistically higher than Fall 2020
 ↓ Statistically lower than Fall 2020



Current Economic Situation



How would you describe the current economic situation in...?

Base: All respondents (n=500)

Source: 2021 Economic Perspectives Survey Q1

Data labels of <3% are not shown

2021 Inclusivity Snapshot

69%

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

67%

Agree “The City of Calgary municipal government strives to create a city that is equally accessible for all Calgarians, no matter their physical ability”

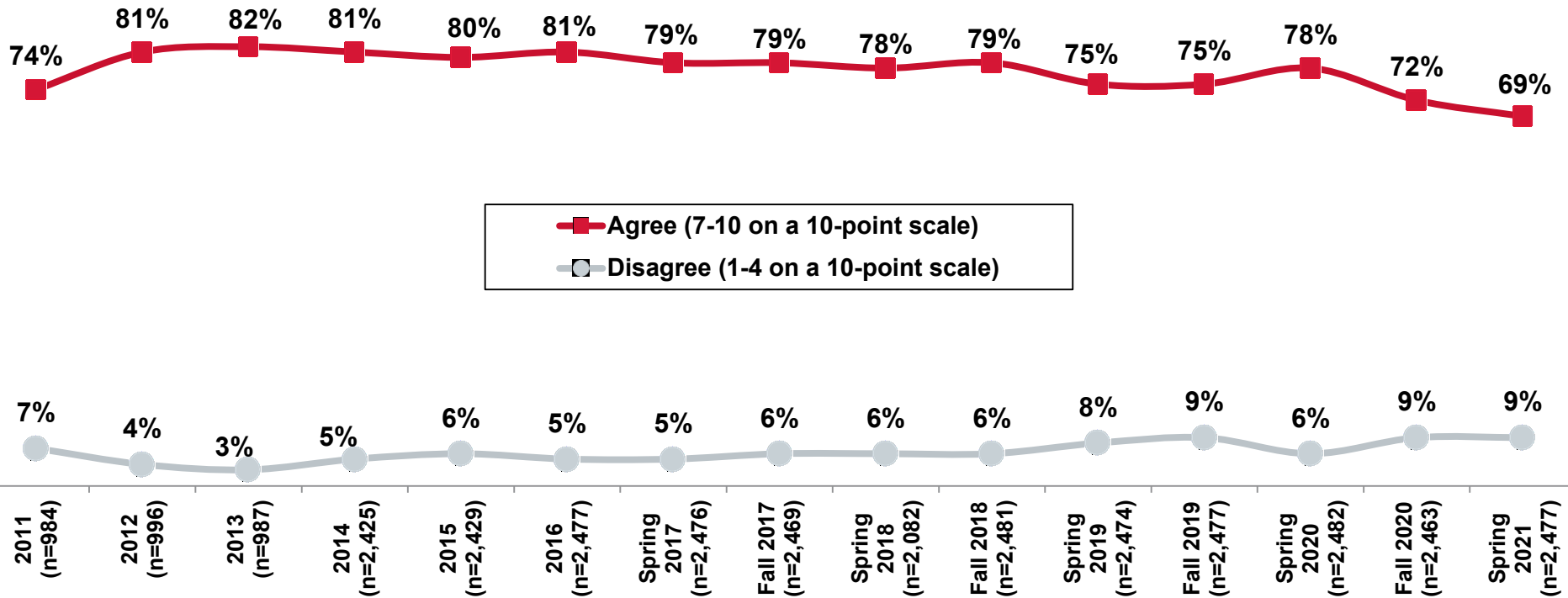
57%

Agree “The City of Calgary delivers programs and services that remove barriers to participation for Calgarians who need it the most”



Inclusive and Accepting City

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



Neutral ratings of 5 or 6 are not shown

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
Source: 2021 Spring Pulse Survey



Issue Agenda & Value for Taxes



Issue Agenda

Multiple Responses

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

■ First Mention

% Change
Fall 2020 – Spring 2021

Issue	First Mention	Other	NET	% Change
Net – Traffic & Roads	23%	10%	33%	+5↑
(Lack of) snow removal	9%	4%	13%	+9↑
Road conditions	5%	7%		-2
Traffic congestion	3%	4%		-
Net – Transit	7%	5%	12%	-
Public Transportation [incl. buses/ C-train/ poor service]	4%	3%	7%	+1
Net – Crime, Safety & Policing	7%	4%	11%	-4↓
Crime, including breaking and entering/ gangs/ drug dealers, etc.	3%	5%		-2↓
Public safety	3%	4%		-2↓
Net – Taxes	8%	10%		-3↓
High taxes	5%	7%		-2↓
Property taxes	3%	4%		-
Net – COVID-19	8%	10%		-1
Net – Economy	7%	10%		+1
Cost of living	4%	5%		+1
Unemployment/ job creation	3%	4%		-
Net – Recreation	4%	4%	8%	+1
Net – Environment and Waste Management	4%	3%	7%	-
Net – Homelessness, Poverty & Affordable Housing	4%	6%		-
None	14%			-1

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=2,425)

Source: 2021 Spring Pulse Survey

Data labels of <3% are not shown

NET mentions of ≤4% are not shown

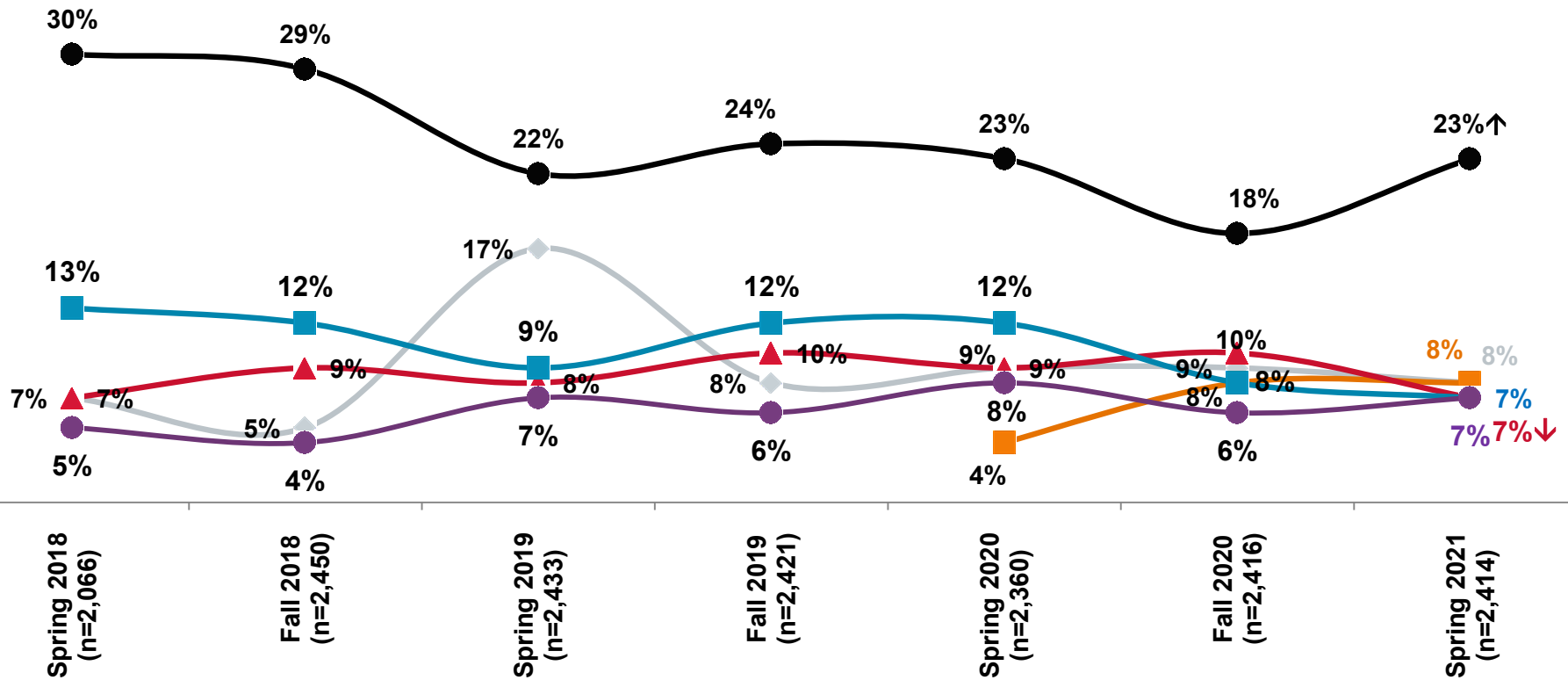
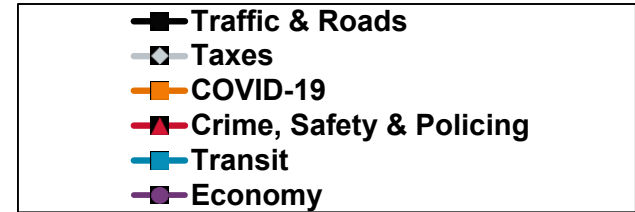
↑Statistically higher than Fall 2020

↓Statistically lower than Fall 2020



Tracking Most Important Issue Facing Calgary

Current Top 6
First Mention Only



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

Base: Valid respondents

Source: 2021 Spring Pulse Survey

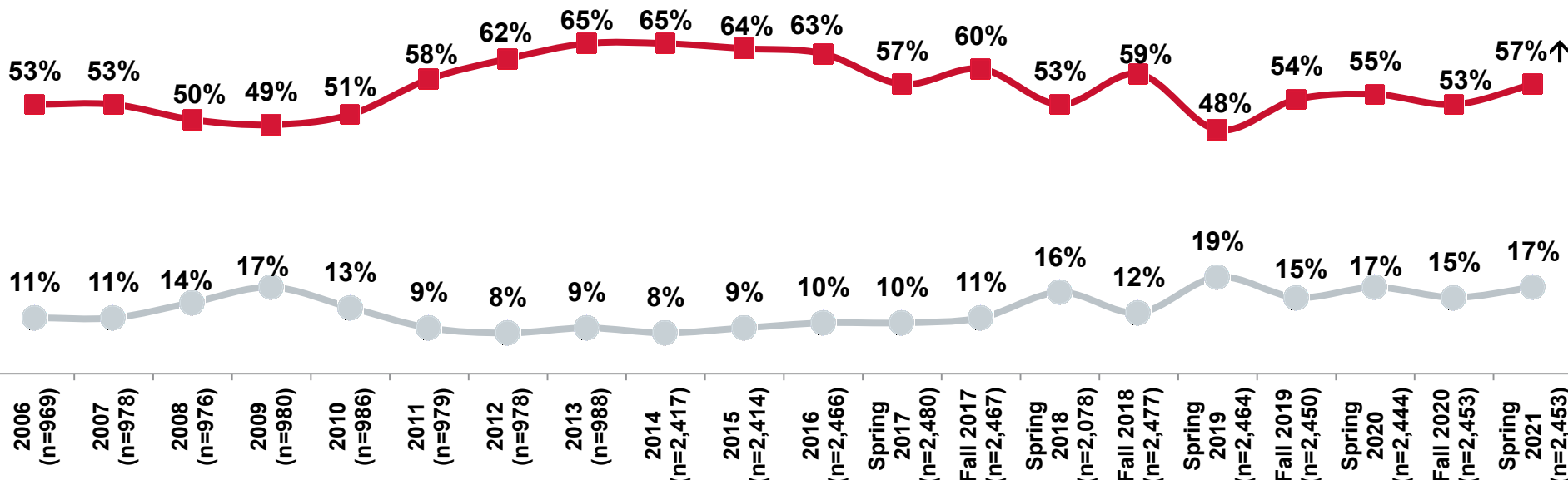
↑ Statistically higher than Fall 2020
↓ Statistically lower than Fall 2020



Tracking Perceived Value of Taxes

Please rate the value you feel you receive from your municipal property tax dollars

■ Good value (7-10 on a 10-point scale)
● Poor value (1-4 on a 10-point scale)



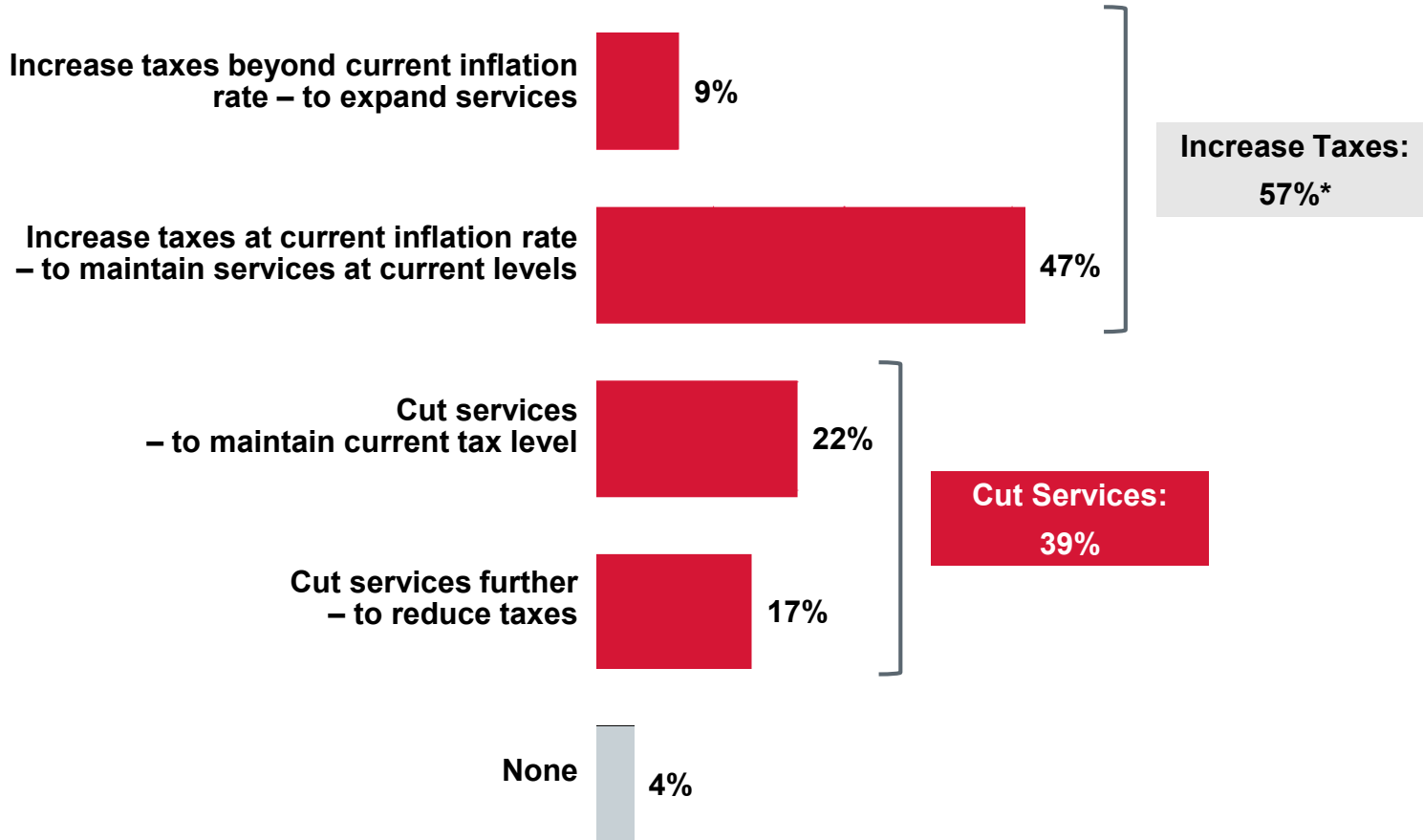
Your property tax dollars are divided between The City and the Province. In Calgary, approximately two-thirds of your residential property tax payment goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal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

Base: Valid respondents
Source: 2021 Spring Pulse Survey

Neutral ratings of 5 or 6 are not shown
 ↑ Statistically higher than Fall 2020
 ↓ Statistically lower than Fall 2020



Balancing Taxation and Service Delivery



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

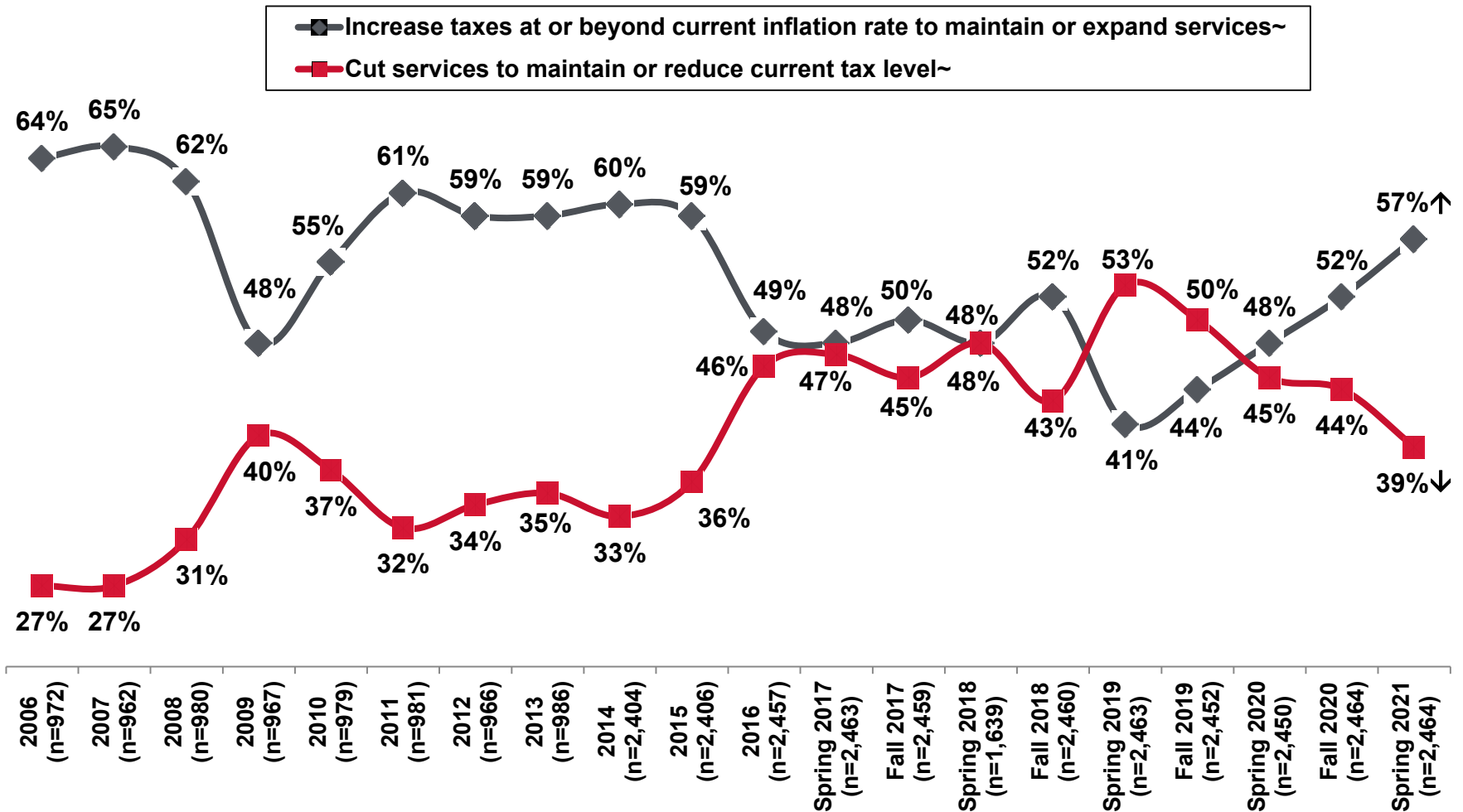
Base: Valid respondents (n=2,464)

Source: 2021 Spring Pulse Survey

*Rounding



Increase Taxes vs. 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 | ~Slight wording variation prior to Fall 2020

Source: 2021 Spring Pulse Survey

↑ Statistically higher than Fall 2020
 ↓ Statistically lower than Fall 2020

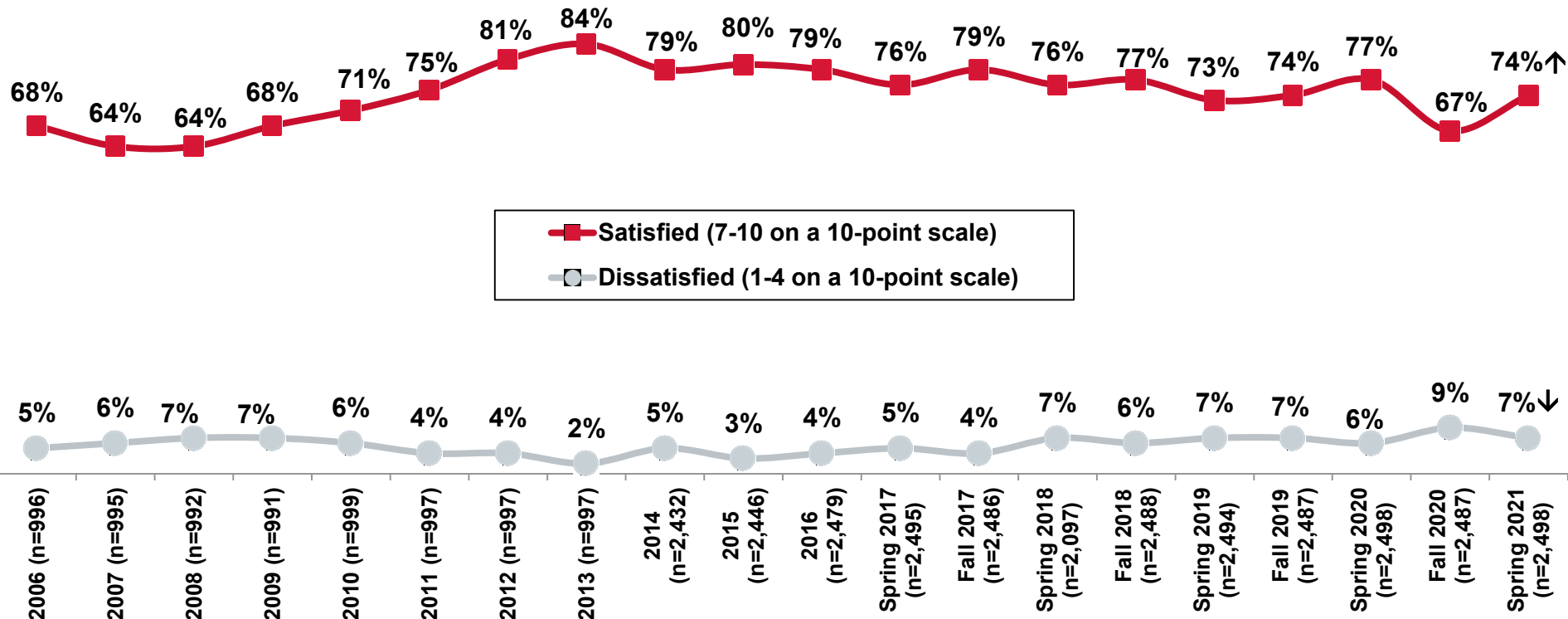


City Programs & Services



Overall Satisfaction with City Programs and Services

Satisfaction with the overall level and quality of services and programs provided by The City of Calgary



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
Source: 2021 Spring Pulse Survey

Neutral ratings of 5 or 6 are not shown
↑ Statistically higher than Fall 2020
↓ Statistically lower than Fall 2020



Notable Service Perception Changes (vs. Spring 2020)

Community Services

94%↑

Satisfied with Parks and Open Spaces

<u>Satisfied</u>	<u>Service</u>	<u>'Invest More'</u>
94%↑	Parks and Open Spaces	38%
87%↓	Recreation Opportunities	52%↑
87%	Neighbourhood Supports	49%↑
80%↓	Arts and Culture	28%

Transportation & Emergency Services

63%↓

Satisfied with Streets

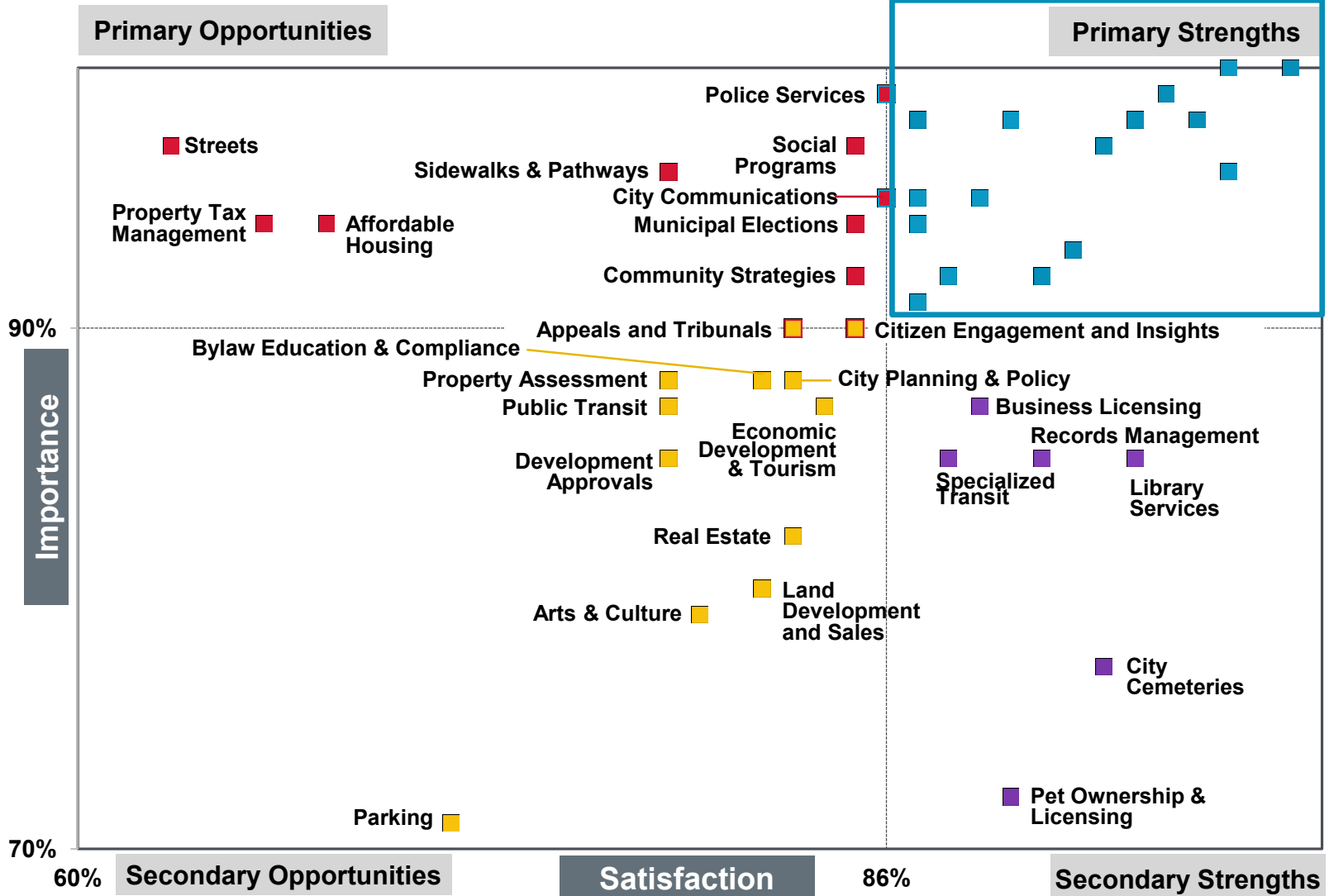
<u>Satisfied</u>	<u>Service</u>	<u>'Invest More'</u>
63%↓	Streets	62%↑
91%↓	Stormwater Management	28%
99%↑	Calgary Fire Department	47%
86%	Calgary Police Service	48%↓
90%↓	Emergency Management	42%

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



Importance vs. Satisfaction Grid

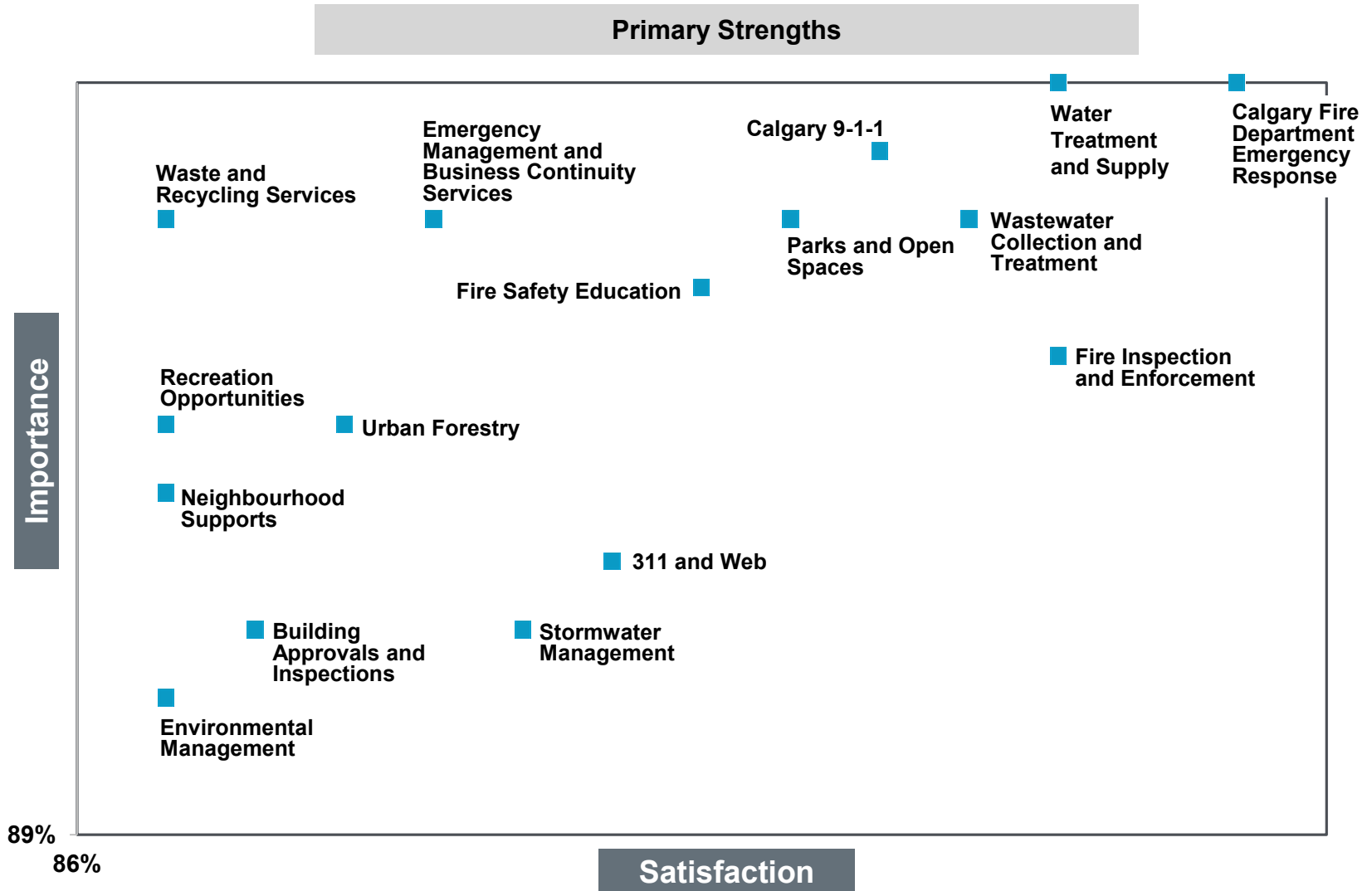
Primary Strengths are labelled on the next slide



“Taxis, limousines and vehicles-for-hire” is plotted at (87% satisfaction, 62% importance) and is not illustrated on this graph.



Importance vs. Satisfaction Grid



Source: 2021 Spring Pulse Survey

Green Line Snapshot

90%

Rate the Green Line as 'important' to the future of Calgary, 10 years down the road and beyond

91%

Agree "The Green Line LRT will enable Calgarians to better connect with people, places and services"

89%

Agree "The Green Line LRT will be an important addition to Calgary's transportation network"



City Performance and Reputation

Communications and Customer Service Snapshot

81%↓

Agree “The City of Calgary meets my customer service expectations”

78%↓

Agree “The quality of customer service from The City is consistently high”

77%

Rate The City of Calgary’s communication with citizens as ‘good’

76%↓

Agree “The City of Calgary makes customer service a priority”

72%

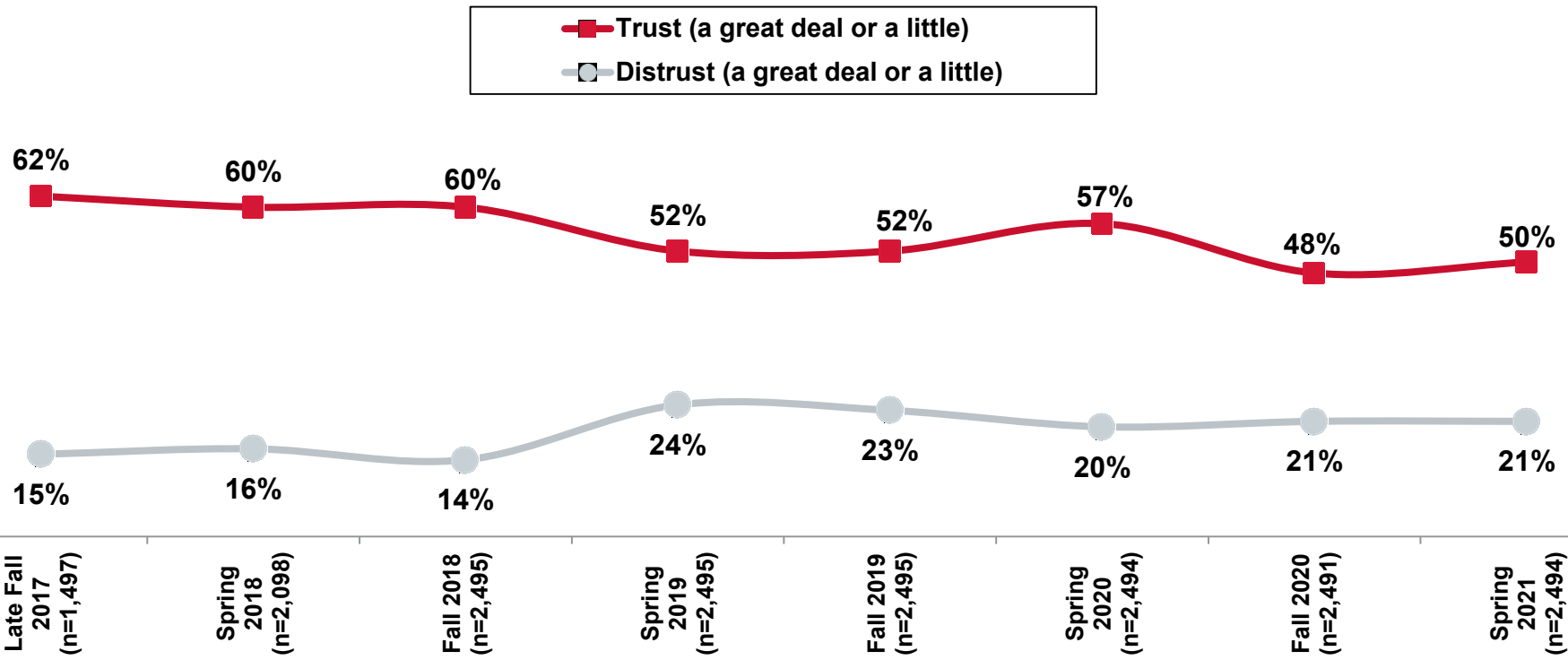
Agree “The City responds quickly to requests and concerns”

↑Statistically higher than Fall 2020
↓Statistically lower than Fall 2020



Trust

How much do you trust or distrust The City of Calgary?



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?

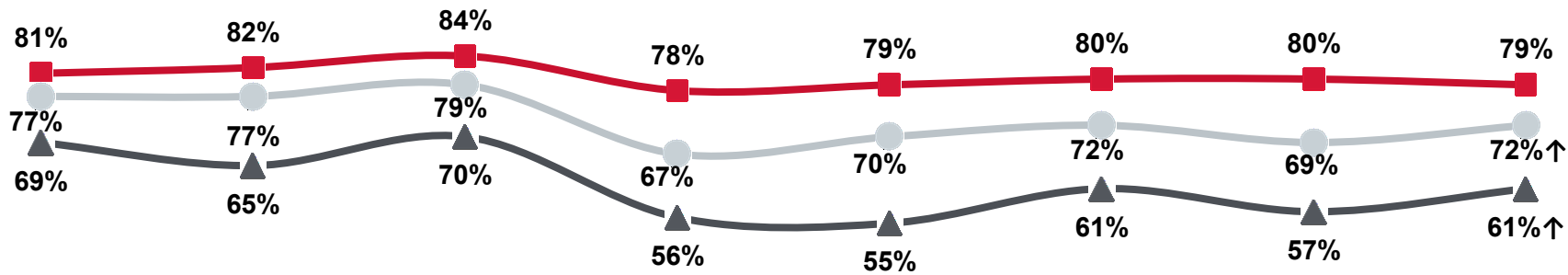
Base: Valid respondents
Source: 2021 Spring Pulse Survey

Neutral ratings are not shown



Perceptions of City Performance

% Satisfied

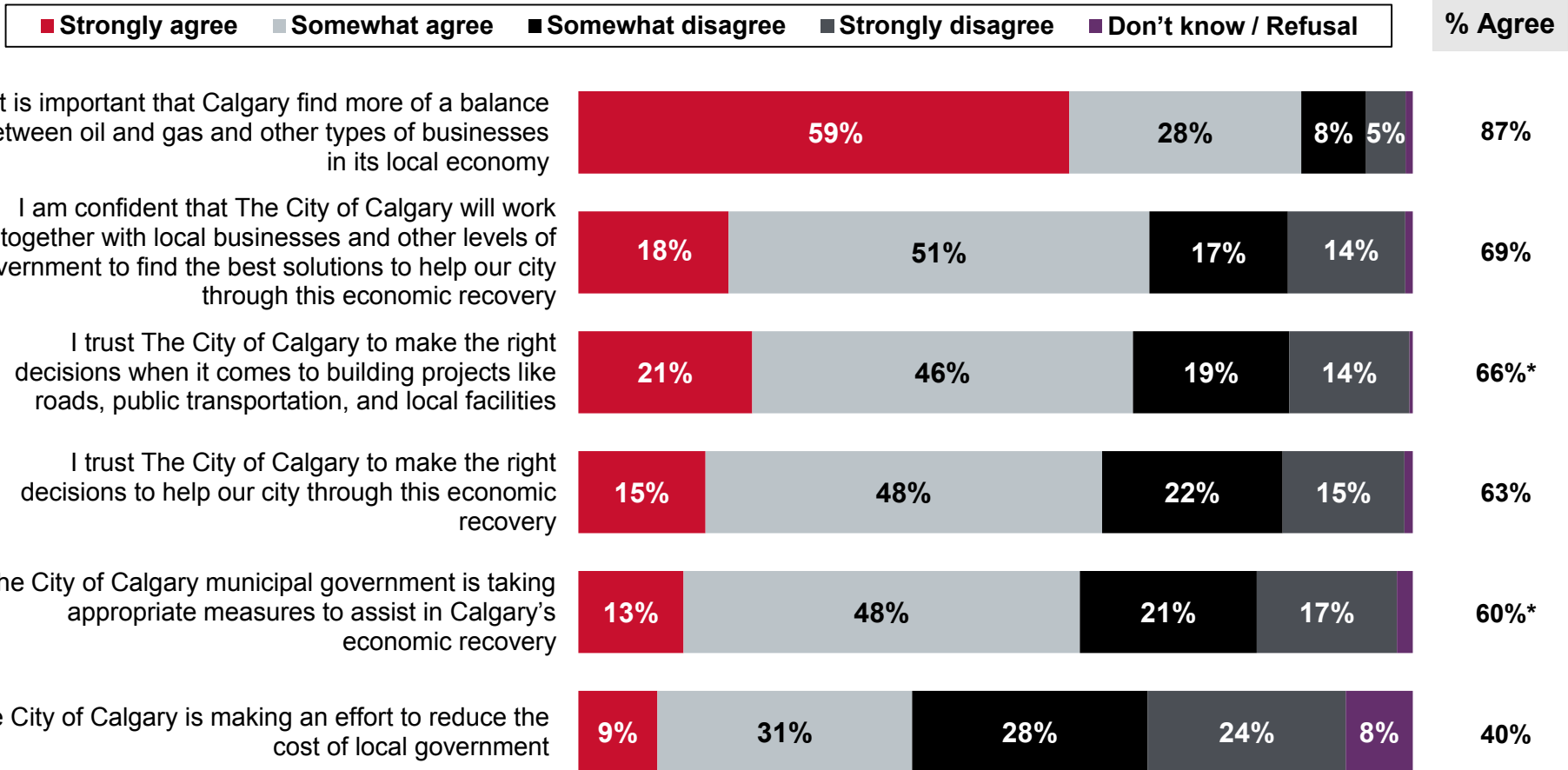


Late Fall 2017 Spring 2018 Fall 2018 Spring 2019 Fall 2019 Spring 2020 Fall 2020 Spring 2021

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)
 Source: 2021 Spring Pulse Survey

↑ Statistically higher than Fall 2020
 ↓ Statistically lower than Fall 2020

The City's Role in Economic Recovery and Investments



Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

Base: All respondents (n=500)

Source: 2021 Economic Perspectives Survey Q1

*Rounding

Data labels of <3% are not shown



Perceptions of Collaboration, Transparency, and Citizen Input

Agree “The City of Calgary practices open and accessible government”

69%↓

68%

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

61%↓

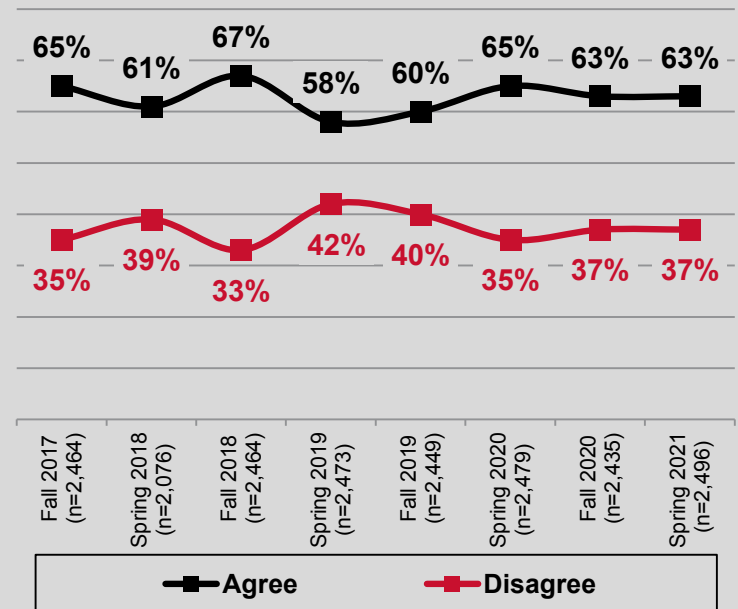
Agree “Calgarians have enough opportunities to provide input into decision-making about City projects and services”

57%

Agree “The City of Calgary manages its spending in a responsible way that reflects the needs and priorities of Calgarians”

Agree “The City allows citizens to have meaningful input into decision-making”

63%



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

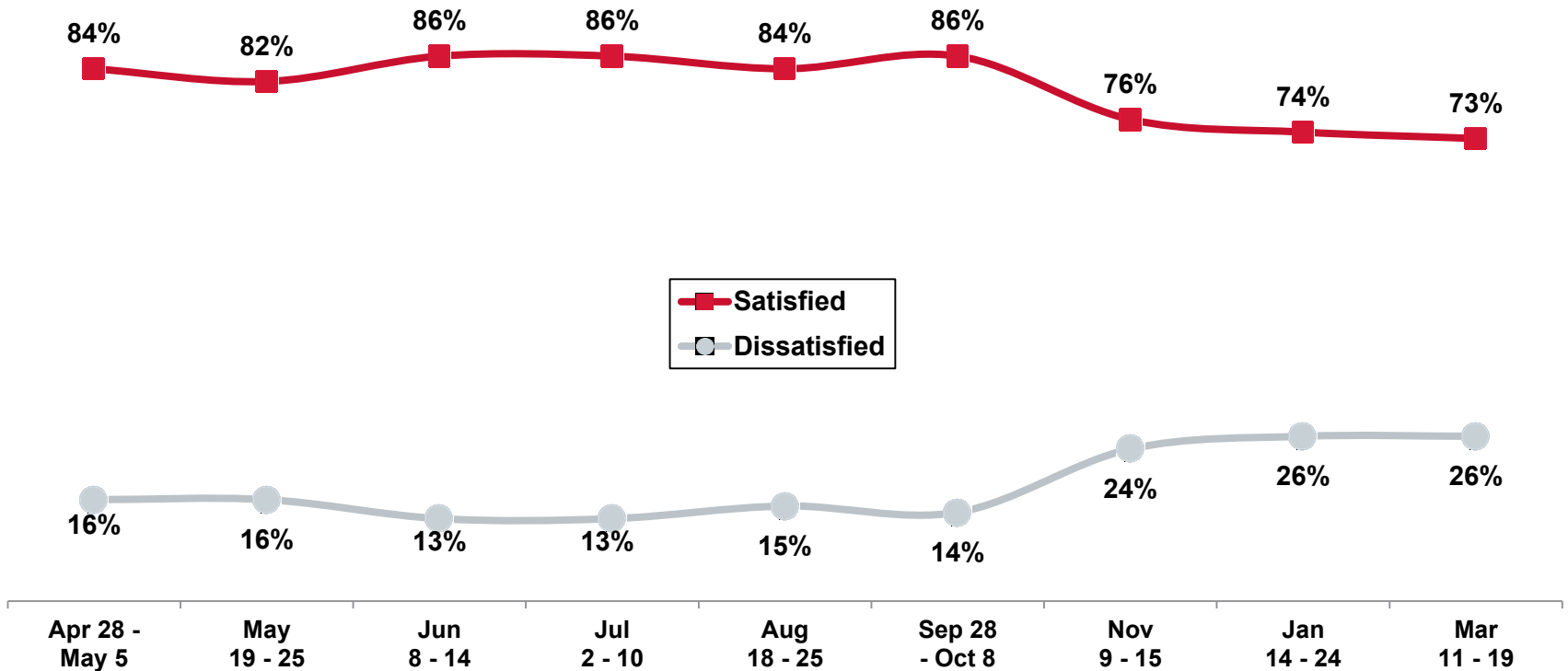


COVID-19 Snapshot #9



Satisfaction with The City's COVID-19 Response

% Satisfied



■ Satisfied
● Dissatisfied

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

Base: Valid respondents (Bases vary)

Source: COVID-19 Snapshot #9



Impacts of COVID-19

49%

Rate their mental health as worse than prior to the pandemic

39%

Rate their physical health as worse than prior to the pandemic

Rate their personal financial situation as worse than prior to the pandemic

38%



The COVID-19 has had a negative financial impact on Calgarians ability to . . .

25%

pay their bills on time

21%

pay their mortgage or rent on time

14%

pay their property taxes on time



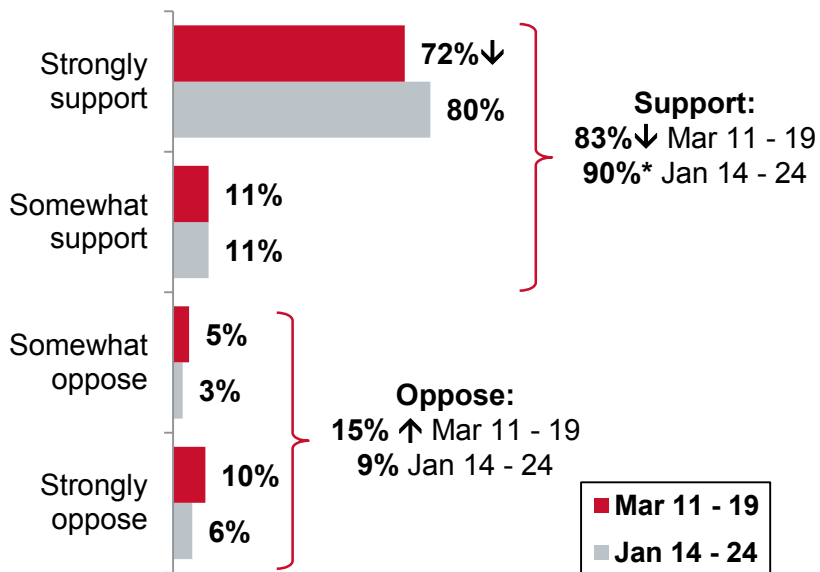
Exceptions include children under two years of age, or persons with an underlying medical condition or disability which inhibits their ability to wear a face covering

Visit calgary.ca/covid19 for more information.

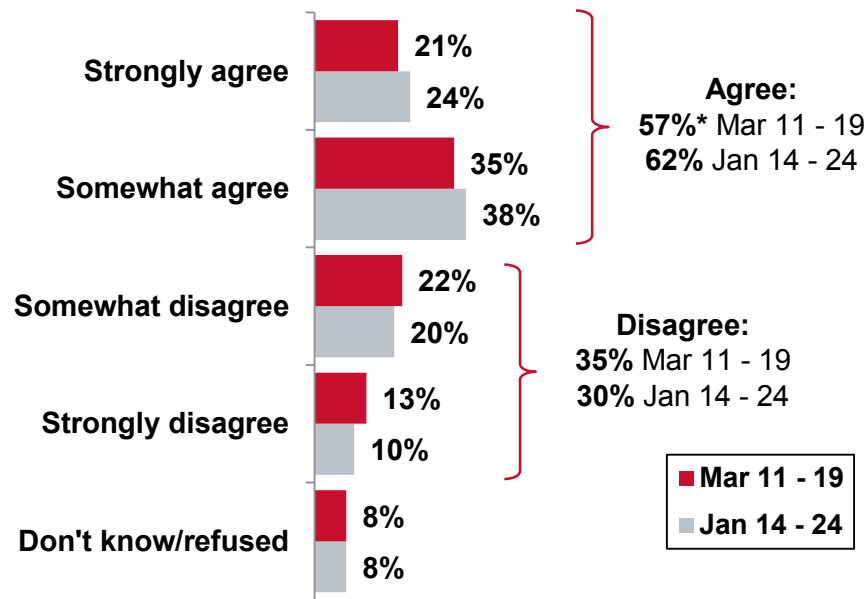


Face Coverings Bylaw Enforcement

Support of Face Coverings Bylaw



Agreement with Level of Enforcement of Face Coverings Bylaw



As you may already know, on July 21st City Council voted in favour of a bylaw that requires face masks or coverings be worn on public transit and in public indoor spaces such as retail stores and shopping malls, recreation centres and public common spaces in office buildings. To what extent do you support or oppose this bylaw?

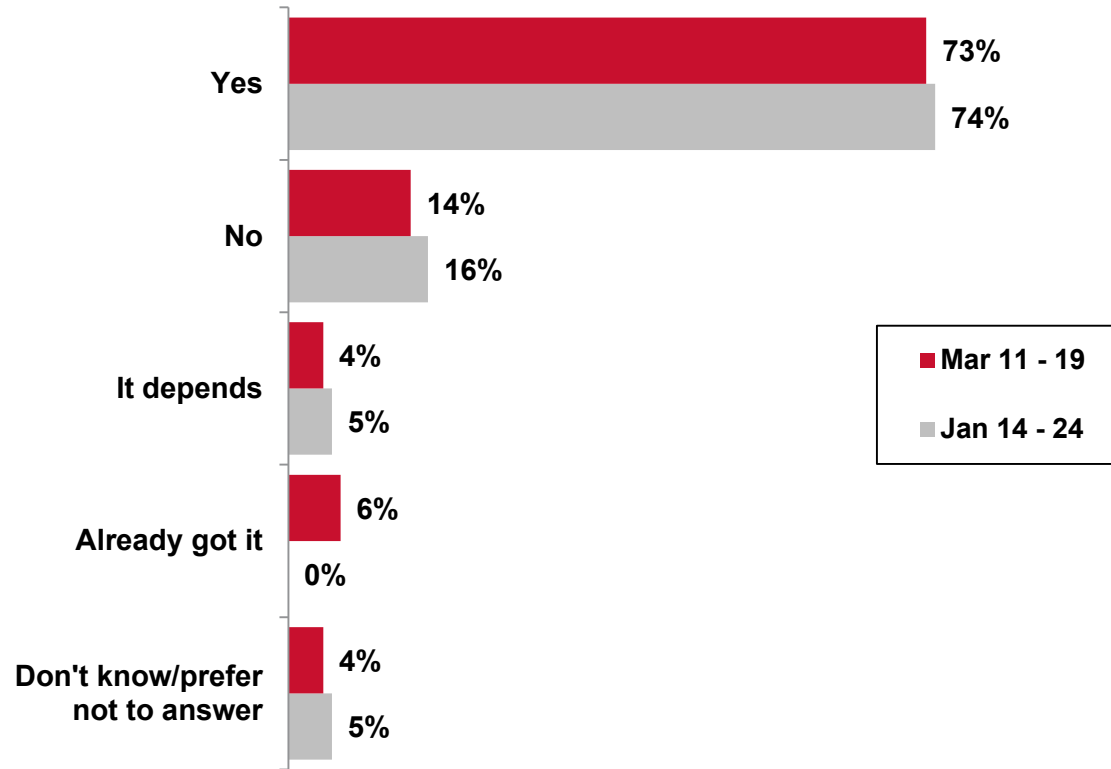
Base: All respondents (n=500)
Source: COVID-19 Snapshot #9

To what extent do you agree or disagree that The City is sufficiently enforcing the Face Coverings Bylaw?

Base: All respondents (n=500)
Source: COVID-19 Snapshot #9

*Rounding

Intention to Get the COVID-19 Vaccine



When a COVID-19 vaccine is available to the general public, do you intend to get it?

Base: All respondents (n=500)

Source: COVID-19 Snapshot #9

Thank you