

People, Innovation & Collaboration Services Report to
Regular Meeting of Council
2023 October 17

ISC: UNRESTRICTED
C2023-1104

2023 Fall Research Results

PURPOSE

The purpose of this report is to provide Council with a summary of the most recent Fall Research results, providing perspectives of Calgarians regarding their experiences, values, and priorities. This information can be used for consideration in decision making and to support strategic decision making on service investment and focus.

PREVIOUS COUNCIL DIRECTION

There is no official Council direction for this item. Through ongoing conversations with Council, Administration continues to adapt and evolve the research program to provide relevant and actionable insights to inform Council's result areas of:

- Public safety
- Climate
- Social equity
- Modernizing government

RECOMMENDATION:

That Council:

1. Receive this report in advance of 2023 Budget Adjustments for discussion and the Corporate Record; and
2. Direct that the Closed Meeting discussions, Report, and Attachments be held confidential pursuant to Section 25 (Disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act* until the item is presented at the October 17 Regular Meeting of Council.

CITY MANAGER/GENERAL MANAGER COMMENTS

General Manager Chris Arthurs concurs with this report and its recommendations.

HIGHLIGHTS

- Research is a critical tool in helping Council and Administration better understand the needs and perceptions of Calgarians, informing decision making and providing accountability through performance measures and insights.
- The results of the 2023 Fall Research Results Summary, and the research activities that inform it, reflect the opinions of residents on a variety of aspects of living in Calgary, including overall satisfaction with services, The City's performance, perception of value for taxes, and outlook for the future.
- Like many Canadians in large municipalities across Canada, many Calgarians are concerned about the growing cost of living, housing affordability, climate, perception of rising crime, safety, and social issues. And while most Calgarians do agree they enjoy a good quality of life and think Calgary is a good place to make a living, a growing number feel that the quality of life in Calgary has 'worsened' over the past three years. Moreover, while a majority of Calgarians say that 'homelessness, poverty and affordable housing' is the most important issue that they want their local leaders to address, less than four in ten agree that Calgary is moving in the right direction to ensure a high quality of life for future generations.

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- Several surveys informed the *2023 Fall Research Results Summary* (Attachment 2), including:
 - 2023 Fall Survey of Calgarians
 - 2023 Municipal Benchmarking Survey
 - 2023 Economic Perspectives Wave 3 Survey
 - 2023 Calgary Attitudes & Outlook Survey
 - 2023 Citizen Perspectives Survey – Perceptions of Safety
 - 2023 Citizen Perspectives Survey – Elevate Calgary
 - 2023 Citizen Perspectives Survey – Council Focus Areas
 - 2023 Citizen Perspectives Survey – Diversity and Inclusion
 - 2023 Citizen Perspectives Survey – Housing Affordability and Affordable Housing
 - 2023 Citizen Perspectives Focus Groups: Downtown and Safety
- To ensure Council and Administration are able to make the most of these surveys, the research program has adapted to address Council's changing needs. This report brings the highlights of a number of research tactics completed in the last six months, including the *2023 Municipal Benchmarking Survey*, which compares Calgary's key performance measures against similar cities Edmonton, Toronto, Vancouver, and Montreal, the keystone *2023 Fall Survey of Calgarians*, and additional surveys and focus groups that focused on a topic or focus area of interest to Council.
- Some changes were made to the *2023 Fall Survey of Calgarians*:
 - Additional questions focused on Council strategic priorities were added; these new questions focus on public safety, climate, social equity and modernizing government.
 - Fielding of the survey took place two weeks earlier to better support Council fall discussions.
 - The by-service importance, satisfaction, and investment questions were removed to maintain the overall length of the survey; these questions will return in the spring.

DISCUSSION

- The findings from the Fall Research Report are markers of Calgarians' opinions on a variety of aspects of The City and serve as a performance-based report, identifying strengths and opportunities for improvement.
- When making decisions on municipal matters, the opinions and priorities of Calgarians are important considerations.
- Calgarians are navigating significant and interrelated pressures, similar to those faced by Canadians in other municipalities. Calgarians are concerned about affordability, climate, safety, and social issues associated with mental health and addictions.
- The benchmarking survey reveals a general decline in trust and satisfaction with government among residents of other municipalities, with Calgarians following this trend, with some distinctions. Calgarians continue to express notably higher satisfaction with their quality of life compared to residents of Vancouver, Montreal, Edmonton, and Toronto, 10 per cent above the 'Municipal Norm,' an average of the four other included municipalities. In addition, 67 per cent of Calgarians are satisfied with The City's programs and services, compared to 61 per cent of the Municipal Norm.
- Calgarians are experiencing greater uncertainty regarding their own financial well-being as well as others in their community. Seven in ten agree that Calgary is a great place to

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make a living, a drop from the same time last year, reflecting less certainty regarding their own ability to navigate through changes in Calgary's economy.

- The overall quality of life in Calgary remains stable with three-quarters of Calgarians considering it 'good', a growing majority (now six-in-ten) feel that the quality of life has 'worsened' over the past three years.
- For the first time, 'homelessness, poverty and affordable housing' top the list of important issues that Calgarians want local leaders to address. This is followed by 'infrastructure, traffic and roads' and 'crime, safety, and policing.'
- Seven in ten agree that the city is on the right track to be a better city ten years from now. However, the same cannot be said of the longer-term outlook, with less than four in ten agreeing that Calgary is moving in the right direction to ensure a high quality of life for future generations. This may reflect growing concerns over the impacts of forest fires, climate change, and international social and political trends.
- While seven-in-ten Calgarians continue to rate Calgary as 'safe' overall, this measure has also seen a decline in recent years.
- Almost half of Calgarians feel neighborhood crime has 'increased.' New measures also indicate that Calgarians feel safety needs to be improved on transit and in downtown.
- Half of Calgarians feel they receive 'good' value for their tax dollars, which is consistent with spring 2023, and on par with the Municipal Norm.
- Calgarians are split on whether they think it would be best to deal with increased costs through increasing taxes or cutting services. Many feel The City can improve on providing Calgarians with information on how property tax dollars are invested.
- Full research reports for data points referenced in the 2023 Fall Research Summary will be available online at [Calgary.ca/CitizenSatisfaction](https://calgary.ca/CitizenSatisfaction). Complete qualitative (focus group) reports are available for internal distribution upon request.

EXTERNAL ENGAGEMENT AND COMMUNICATION

- | | |
|--|---|
| <input type="checkbox"/> Public engagement was undertaken | <input checked="" type="checkbox"/> Dialogue with interested parties was undertaken |
| <input type="checkbox"/> Public/interested parties were informed | <input checked="" type="checkbox"/> Public communication or engagement was not required |

Public engagement was not conducted in advance of the surveys presented in this report. Though the results of these surveys will be communicated to Calgarians, public communication did not take place prior to conducting the survey, as the methodology employed was random digit dialing or online via sourced online sample providers. To maintain the integrity of the methodology, Calgarians cannot self-select to participate in these surveys.

In conducting corporate-level research at The City, the Corporate Research team consults with the City Manager, the General Manager of People, Innovation and Collaboration Services, the Director of Customer Service & Communications, and Corporate Planning and Performance/One Calgary, among others.

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IMPLICATIONS

Social

- The research is weighted to be representative of Calgary's population, 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 on specific sub-groups.
- Results related to the Social Wellbeing Policy included in this presentation are mental health and inclusivity. In addition, the large sample size for the *2023 Fall Survey of Calgarians* allows The City to conduct analysis of sub-groups including equity-deserving communities. A report, under separate cover, will be prepared based on those findings.

Environmental

- Findings from the *2023 Fall Survey of Calgarians* and other reports referenced in this presentation include results related to residents' perceptions of the environment and environmental management.

Economic

- The findings serve to inform Council and contribute to decision making on several economic-related topics, including Calgarians' perception of infrastructure spending, the economy in general, taxes and user fees, and others.

Service and Financial Implications

No anticipated financial impact

The findings from this research are intended to inform decision making at all levels while consequent actions are at the discretion of the service owners.

RISK

It is important to consider Calgarians' perspectives around their needs, values, attitudes, and aspirations in decision-making. By incorporating their perspectives in a balanced way, we strengthen trust and transparency with Calgarians, manage corporate reputational risk and drive continuous service improvement.

ATTACHMENT(S)

1. Attach 1 - 2023 Fall Research Results Presentation
2. Attach 2 - 2023 Fall Research Insights and Recommendations

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Krista Ring	People, Innovation & Collaboration Services	Approve

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Chris Arthurs	People, Innovation & Collaboration Services	Approve
David Duckworth	City Manager's Office	Consult
Executive Leadership Team		Inform

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