

People, Innovation & Collaboration Services Report to
Regular Meeting of Council
2024 May 28

ISC: UNRESTRICTED
C2024-0487

2024 Spring Research Results

PURPOSE

The purpose of this report is to provide Council with a summary of the most recent Spring Research results, providing insight into Calgarians' perceptions of City services and their experiences, values and priorities. This information can be used to support strategic decision-making on service investment and focus.

PREVIOUS COUNCIL DIRECTION

There is no official Council direction for this item. The Spring Survey of Calgarians is shared with Council annually for information.

RECOMMENDATION(S):

That Council receive this report and attachments for the Corporate Record.

CHIEF ADMINISTRATIVE OFFICER/GENERAL MANAGER COMMENTS

General Manager Chris Arthurs concurs with this report.

HIGHLIGHTS

- Like many Canadians in large municipalities across Canada, Calgarians are concerned with increasing costs of living, housing affordability, climate change, perception of rising crime, safety, homelessness, and other pervasive social issues and increased polarization in political discourse. Results this year show while most Calgarians agree they enjoy a good quality of life, a growing number feel the quality of life in Calgary has worsened over the past three years.
- With increased costs of living, and housing weighing heavy on Calgarians, many renters are worried about their ability to manage escalating rental costs and are uncertain about their prospects of homeownership; moreover, some homeowners are also growing anxious about their ability to continue affording their homes. These financial uncertainties may cause many Calgarians to doubt whether they can remain in their communities which can impact their sense of belonging, connection, quality of life and contribute to a discouraging future outlook.
- As in fall 2023, Calgarians are currently experiencing greater uncertainty regarding their own financial wellbeing as well as that of others in their community. From rising food prices to the day-to-day expenses of utilities, housing, clothing, transportation, and other necessities, many Calgarians are feeling the impacts of inflation first-hand. As we see in the 2023 Spring Survey, 63 per cent agree that Calgary is a great place to make a living, a 10-point drop from the same time last year. Relatedly, our most recent Economic Perspectives survey shows only 16 per cent say Calgary's economy will be stronger in the next six months – a proportion that remains unchanged from the last quarter of 2024. This reflects less certainty regarding Calgarians' own ability to navigate through changes in our city's economy.

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- Recent announcements from the Alberta provincial government also have the potential to impact many Calgarians; these announcements, coupled with public conflict with the federal government and anticipated lack of municipal autonomy could put a strain on many Calgarians and their perceptions of life in Calgary.
- It is worth noting that many spring 2024 quality of life ratings have declined compared to spring 2023. While some declines were first observed in fall 2023 remain stable, new ones have emerged over the winter.
- Calgarians are navigating significant pressures and grappling with worries about the preservation of their quality of life as well as seeking safety and security and being worried about the future of their city and their children's future quality of life. As such, some declines should be expected, and our success can be seen in how some key metrics remain positive.
- Full research reports for data points referenced in the 2024 Spring Research Summary will be available online at [Calgary.ca/CitizenSatisfaction](https://calgary.ca/CitizenSatisfaction).

DISCUSSION

- When making decisions on municipal matters, the opinions and priorities of Calgarians are important considerations. The findings from the *2024 Spring Survey Research Report* provides insights into Calgarians' opinions on a variety of aspects of The City and serves as a performance-based report, analyzing service importance and satisfaction, and identifying strengths and opportunities for improvement.
- Research is a critical tool in helping Council and Administration better understand the needs and perceptions of Calgarians. It informs decision-making and provides accountability through performance measures and insights. The City's Corporate Research Team is dedicated to conducting both corporate-level and business unit-specific research to provide insights to support decision-making at The City. The Spring Survey is a service-based tool focused on administration, accountability and planning, for each of The City's service lines. This helps our services measure success and strategize for the future.
- The City has completed its annual Spring Survey with Calgarians. The results of this representative survey, coupled with additional research findings from Calgarians over spring 2024, provide Council with insights into Calgarians' opinions on a variety of elements of The City including satisfaction with services, The City's performance, quality of life and Calgarians' outlook for the future.
- Perceptions of Calgary as a great place to make a life and a living have seen declines, a trend consistent with other municipalities in Canada. Calgarians' views on The City's efforts to foster inclusivity and accessibility have also shown similar downward trends. Looking to the future, Calgarians show less optimism about The City's direction with 38 per cent agreeing The City is moving in the right direction to ensure a high quality of life for future generations. While these results are consistent with last fall, they are markedly lower than the results from this time last year. This is the same for Calgarians who believe Calgary is on the right track to becoming a better city in the next 10 years. While 65 per cent reflect on the next decade positively, the proportion of Calgarians who

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indicate concern and less enthusiasm about our city's future has grown significantly. This is an important measure as this is the first time we've seen Calgarians reflect on Calgary's future with such discouragement.

- Another important measure to reflect on is Calgarians' satisfaction with The City's level and quality of services and programs. With 63 per cent of Calgarians saying they are satisfied with the overall level and quality of services and programs offered by The City, overall satisfaction has slipped significantly from last year. Coupled with Calgarians' perception of the value they receive from property taxes, we have observed a significant decline in overall satisfaction. While these measures may appear positive in isolation, comparisons from this time last year paint a discouraging picture, especially since this marks the lowest level recorded for 'value for property tax dollars' across historical data.
- However, it's also important to note that satisfaction with individual services remains consistently high. From snow clearing and waste and recycling to parks, transit, bylaw and sidewalks, a majority of Calgarians continue to tell us that services are important to them and that they are satisfied with most services. In total, 32 out of the 50 services and programs asked about in the survey receive high satisfaction ratings from 80 per cent or more Calgarians. Even more favourably, 11 of these receive high satisfaction ratings of 90 per cent or more. Other services remain on par or only slightly below ratings this time last year. Calgarians are telling us that the things we do matter and that they appreciate the work and services The City delivers every day.
- When it comes to key issues Calgarians want local leaders to address, a majority say that 'infrastructure, traffic and roads' is the most important issue facing Calgary. This is typically regarded as the top issue for Calgarians apart from last fall when it was bumped to second place after 'homelessness, poverty and affordable housing.' As perception of 'homelessness, poverty and affordable housing' as an issue has slightly improved, this could indicate Calgarians' support of The City's initiatives to help those most impacted has also improved.
- While Calgarians' trust has waned slightly from last year, a majority remain generally satisfied with the way The City is being run. The context we all work in has shifted significantly over the past few years, and governments have entered a time where building trust and maintaining reputation is more challenging than in previous years.
- While results this spring may have taken a downward trend and appear discouraging, they highlight opportunities for improvement that will drive optimism for our city's future. For example, many express strong optimism around Calgary's Event Centre, with 85 per cent of Calgarians agreeing the Event Centre will be good for Calgary's tourism industry and another 82 per cent agreeing it will be good for local businesses. And while many are concerned about climate change in general, a solid majority of Calgarians (92 per cent) agree the quality of Calgary's environment (air, water and land) is 'very good' or 'good.'

Additionally, while safety and crime are issues that are top-of-mind for many Calgarians, a large majority (73 per cent) believe Calgary is 'safe overall,' a proportion on par with findings from fall 2023. Notably, our National Municipal Benchmarking survey shows Calgary is on par with other large municipalities when it comes to perceptions of overall safety in our city.

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EXTERNAL ENGAGEMENT AND COMMUNICATION

- | | |
|---|---|
| <input type="checkbox"/> Public engagement was undertaken | <input checked="" type="checkbox"/> Dialogue with interested parties was undertaken |
| <input checked="" type="checkbox"/> Public/interested parties were informed | <input 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 (telephone survey of random Calgary-based cell phone and landline phone numbers). To maintain the integrity of the random and representative methodology, Calgarians cannot self-select to participate in these surveys.

IMPLICATIONS

Social

- The research is weighted to be representative of Calgary's population, ensuring equitable distribution of responses according to age, gender and quadrant.
- In addition, demographic questions are asked to ensure that the data can be viewed with a lens for specific demographics including income, education, employment status, disability, Racialized groups, Indigenous identities, 2SLGBTQIA+ and the intersectionality of these and other factors.
- The large sample size for the *Spring Survey of Calgarians* of 2,501 random residents allows The City to conduct analysis of these demographics, including equity-deserving communities. A report, under separate cover, is prepared based on those findings late Q2 2024. A sample of this size allows for a statistically representative sample with a margin of error (MOE) of ± 2.0 percentage points, 19 times out of 20. The survey was conducted using numbers from both cell phones (60 per cent) and landlines (40 per cent) to obtain a random and statistically representative sample of Calgarians.

Environmental

Findings from the Spring Survey of Calgarians include results related to perceptions of climate change, Calgary's environment and environmental management.

Economic

These findings serve to inform Council of Calgarians' values and priorities and contribute to decision-making on a number of economic-related topics, including Calgarians' interests in taxes and service delivery and the city's economic outlook.

Service and Financial Implications

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No anticipated financial impact

RISK

- Listening to Calgarians to better understand their needs, values, attitudes and aspirations is critical to strengthening The City's relationship with Calgarians. Making decisions without leveraging results from these findings can erode public trust and result in declines in Calgarians' perceptions of their quality of life and their long-range outlook.
- The findings from the research conducted with Calgarians in March of this year provides insights into their perspectives on many issues and challenges facing Calgarians every day. Reflecting on Calgarians' perspectives for incorporation into City decisions strengthens sentiments of trust and transparency with The City. If Calgarians' perspectives are not considered in City decision-making, it erodes trust and transparency, thereby impacting The City's reputation and its relationship with the people it serves every day.
- Research of this nature is directly aligned with The City's corporate priorities as well as Council's guiding principles and focus areas. This research provides a way to better understand Calgarians' needs through the lens of those priorities and focus areas and help guide strategic direction for years to come.

ATTACHMENT(S)

1. Attach 1 2024 Spring Research Results Presentation
2. Attach 2 2024 Spring Survey Report

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Jennifer McMurtry	Customer Service & Communications	Approve
Chris Arthurs	People, Innovation and Collaboration Services	Approve
David Duckworth	Chief Administration Office	Consult
Executive Leadership Team		Inform

Author: Corporate Research Team in Customer Service & Communications