

People, Innovation & Collaboration Services Report to
Regular Meeting of Council
2024 October 29

ISC: UNRESTRICTED
C2024-1147

2024 Fall Research Results

PURPOSE

The purpose of this report is to provide Council with a summary of the 2024 Fall Research results. This information provides actionable insights into Calgarians' perspectives on City services, reputation and quality of life and is available for use by Members of Council and Administration for consideration in decision-making.

PREVIOUS COUNCIL DIRECTION

Results from the Fall Survey of Calgarians and other City-generated surveys are shared annually with Members of Council for information and use in strategic planning and decision-making.

RECOMMENDATION:

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

- Research is a critical tool to help Council and Administration understand the needs and perceptions of Calgarians. It informs decisions and provides accountability through performance measures and insights, as well as identifies issues and opportunities for improvement in municipal government.
- To understand the perspectives and experiences of Calgarians, several research tactics are considered and reviewed as part of the 2024 Fall Research Results package. The Fall Survey of Calgarians, the largest and most comprehensive survey, is complemented with other surveys that target specific areas of focus. Additionally, the Municipal Benchmarking Survey provides greater context regarding how Calgary performs compared to the 'municipal norm,' an average of other large municipalities in Canada (Toronto, Vancouver, Edmonton and Montreal).
- Results from the 2024 Fall Survey of Calgarians are consistent with the trends in research over the last few years, including recent trends observed nationally and across the globe.
- Calgarians continue to question the value they receive for their tax dollars and are less likely to trust Council and Administration to make decisions that reflect their priorities, compared to municipalities of similar size and population growth in Canada.
- The 2024 Fall Research Results reveal Calgarians' trust in The City of Calgary is primarily driven by satisfaction with how Council and Administration are running the city. How well Council and Administration work together is also closely tied to Calgarians' trust in their government, with trust and perceived value for taxes both declining since the fall of 2022.
- While Calgarians show a mix of optimism on many aspects, including the economy, many are worried about their future and the future of their city. Inflation, affordability, social

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disorder, climate, and increased political and social divisions have all introduced greater uncertainty into the lives of Calgarians.

- By sharing research results in a transparent and equitable manner, The City continues to demonstrate its commitment to improved delivery of services, value for tax dollars and accountability.
- The 2024 Fall Survey of Calgarians and other research that informed the fall research results can be found on [Calgary.ca/insights](https://calgary.ca/insights).

DISCUSSION

Calgarians have told us what matters to them the most in their community; when asked about what issue should receive the greatest attention from local leaders:

- 35 per cent prioritized infrastructure, traffic and roads, which historically has held top priority
- 18 per cent prioritized economy
- 17 per cent prioritized poverty and affordable housing
- 13 per cent prioritized water supply and infrastructure
- 12 per cent prioritized zoning and growth

The last two items summarize open comments that refer to the feeder main break and the discussions regarding development and rezoning, which are still at the forefront of many Calgarians' minds.

Three key issues have seen significant positive movement from fall 2023: perceptions of safety, transit and housing, all of which are key Council Priority areas that saw new investment over the past two years and continued prioritization from Council and City Administration. This movement highlights the impact we have on improving services for Calgarians, when we invest and dedicate resources towards a priority.

When we compare these five priorities with the upcoming budget adjustment recommendations, City Administration continues to prioritize and take action on what matters most to Calgarians.

Like other Canadians, Calgarians report declining quality of life and question the value they receive for their tax dollars. Forty-three per cent of Calgarians agree they receive good value for tax dollars, which is seven per cent lower than this time last year. This is the first time Calgary has ranked below the national benchmark on this measure, at three per cent lower than the municipal norm.

Although satisfaction with the overall quality and level of services provided by The City of Calgary remains positive, with more than three-fifths satisfied at 63 per cent, it is a significant six per cent drop from this time last year. Calgarians' perceptions of quality of life also saw a significant decrease from spring 2024, reaching an all-time low of 66 per cent.

The number of Calgarians reporting trust in The City is 41 per cent, five per cent lower than this time last year. Notably, Calgary is four per cent below the national municipal norm on this measure. Governments are operating in a time when building trust and maintaining their

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reputation is both more important and more challenging. Eroding social cohesion and the spread of misinformation and disinformation are impacting perceptions of trust locally, provincially, nationally and internationally.

Trust is strongly correlated with satisfaction with how Council and Administration are running The City; 53 per cent of Calgarians indicated satisfaction with how our city is being run, a significant six per cent drop from spring 2024. Calgarians are concerned about The City's transparency with decision-making, and The City's ability to utilize Calgarians input in decisions about programs and services. Only half of Calgarians indicated they have enough opportunities to provide input into decision-making, marking a significant decrease of seven per cent from spring 2024. Improving accountability and transparency in decision-making and demonstrating how Calgarians' input is used can enhance trust.

When it comes to balancing taxation and service delivery, the 2024 Fall Survey highlights divided views on tax increases and service cuts. Forty-six per cent favour an increase in taxes to maintain or expand service levels, while 45 per cent favour cutting taxes to maintain or reduce service levels. When compared to other major municipalities in benchmarking, there are fewer residents in Calgary that want taxes increased to expand or maintain services, and more Calgarians who want services cut.

There is greater uncertainty in the lives of Calgarians, who indicate worry for their future and the future of their city. Polling and ongoing research in 2024 reflect increased cost of living, growing unease over the impacts of forest fires, climate change and international social and political trends are contributing factors in their future outlook. While 61 per cent say Calgary is on the right track to be a better city 10 years from now, this marks a significant four per cent drop in this measure from spring 2024 and a nine per cent drop from this time last year.

These research results present Council and Administration with key insights as The City approaches budget conversations in November. Balancing the desire for investment in priority areas with the need to address affordability, maintain quality of life, and deliver service value will require careful consideration and collaborative decision-making.

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 |

Research is one component in how The City engages with Calgarians. 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.

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IMPLICATIONS

Social

Research results are weighted to be representative of Calgary's population to ensure there is an equitable distribution of responses according to age, gender and quadrant. The survey also asks a series of demographic questions to allow us to view the data from specific lenses such as income, education, employment status, ability, Racialized groups, Indigenous identities, 2SLGBTQIA+ and the intersectionality of these and other factors. To support this, analysis is conducted on the data set to allow us to gain a deeper understanding of the needs of diverse populations in Calgary. From this analysis, results for each equity-deserving community will be available publicly in early 2025 in the Research Library on Calgary.ca.

Results related to the Social Wellbeing Policy included in the presentation focus on inclusivity and equity in City programs and services. A more detailed discussion of Calgarians' perceptions of social equity, and inclusion and belonging can be found in the full report (Attachment 6).

Environmental

The Fall Survey of Calgarians report includes perceptions of Calgarians regarding City programs and services aimed at helping reduce Calgarians environmental impact.

Economic

The findings serve to inform Council on several economic-related topics, including Calgarians' perception of the Calgary economy in general, taxes, perceived valued for tax dollars, affordability and others.

Service and Financial Implications

No anticipated financial impact

The findings from this research are intended to help inform decision-making at all levels of Administration and by Members of Council, while consequent actions are at the discretion of the service owners.

RISK

If decisions are made without considering input from Calgarians shared through surveys and other research, it can erode trust, lead to decisions based on incomplete information and negatively impact perceptions of quality of life and The City's reputation.

ATTACHMENT

1. 2024 Fall Research Results Presentation
2. 2024 Economic Perspectives - Wave 2
3. 2024 Municipal Benchmarking
4. 2024 Perspectives on Calgary - Council Priority Areas
5. 2024 Perspectives on Calgary - Trust and Reputation
6. 2024 Fall Survey of Calgarians Final Report

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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 Administrative Office | Consult |
| Executive Leadership Team | | Consult |

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