

Calgary



# 2018 Quality of Life and Citizen Satisfaction Survey

Final Report

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## Methodology

- ❖ Telephone survey conducted with a randomly selected sample of 2,500 Calgarians aged 18 years and older between August 15<sup>th</sup> and September 12<sup>th</sup>, 2018.
  - Both landline (60%) and cell phone (40%) sample were used.
  - The average interview length was 32 minutes.
- ❖ Final data were weighted to ensure the overall sample's quadrant, ward, and age/gender composition reflects that of the actual Calgary population aged 18 or older according to 2016 Municipal and Federal Census data.
- ❖ The margin of error (MOE) for the total sample of 2,500 is  $\pm 2.0$  percentage points, 19 times out of 20.
  - The margin of error by quadrant is as follows:
    - Northeast: n=467 (MOE  $\pm 4.6$ )
    - Northwest: n=768 (MOE  $\pm 3.6$ )
    - Southeast: n=586 (MOE  $\pm 4.1$ )
    - Southwest: n=679 (MOE  $\pm 3.8$ )
- ❖ Where possible, results are compared to previous iterations of the Citizen Satisfaction survey.
  - One should note that the 2006 to 2016 iterations of the survey were conducted annually in the Fall. Starting in 2017, the survey has been conducted bi-annually, with a Spring and a Fall wave.
  - Given the time of year each survey is run – and possible seasonal differences – caution should be exercised with comparing results from the 2018 Fall Citizen Satisfaction survey to 2018 Spring Pulse survey results.
  - For this reason, and to be consistent across all questions, statistically significant changes from Fall 2017 to Fall 2018 are noted:
    - ↑ indicates number is significantly higher than Fall 2017
    - ↓ indicates number is significantly lower than Fall 2017



## 2018 Highlights





# 2018 Highlights

- 1** Perceptions about the quality of life in Calgary remain strong, and perceptions of a ‘worsened’ quality of life continue to decline.
- 2** “*Infrastructure, traffic and roads*” dominates the 2018 issue agenda, and has gained prominence from one year ago.
- 3** Overall satisfaction with the level and quality of City services and programs is strong, although statistically significant decreases are observed for a number of specific services – most notably Roads and Waste & Recycling.
- 4** Transportation related services garner the strongest desire for increased investment, and the majority also say The City should invest more in affordable housing, social services and the Calgary Police Service.
- 5** The perceived value of property tax dollars remains moderate, and a preference for tax increases over service cuts shows directional movement.
- 6** Perceptions about The City’s customer service delivery holds strong.
- 7** Overall satisfaction with the quality of City information and communications remains solid but down from one year ago, while the majority of Calgarians now say they receive ‘just the right amount’ of information from The City (up from one year ago).
- 8** Results highlight an overall strengthening of The City’s reputation, with both favourability and trust realizing significant gains.
- 9** Satisfaction with City Administration’s performance is up from one year ago, and perceptions related to citizen input remain moderate and consistent.



# Key Findings: Quality of Life

## Perceptions about the quality of life in Calgary remain strong, and two metrics see positive gains.

- ❖ In Fall 2018, more than eight-in-ten (86%) Calgarians say the quality of life in Calgary today is 'good' (statistically consistent with 85% in Fall 2017 but higher than 82% in Spring 2018).
- ❖ Close to half (49%) say the quality of life in Calgary has 'stayed the same' in the past three years – up 4 percentage points from Fall 2017 (45%), while 29% say it has 'worsened' – down 6 percentage points from Fall 2017 (35%).
  - Perceptions of a 'worsened' quality of life have been steadily declining since Spring 2017, though perceptions of an 'improved' quality of life have yet to rebound (22% in Fall 2018 and 20% in Fall 2017).
- ❖ Agreement that 'Calgary is a great place to make a living' remains moderate but up from one year ago.
  - In Fall 2018, 71% of Calgarians agree with the statement – up 3 percentage points from Fall 2017 (68%), though still markedly lower than 80% in 2015.
- ❖ Measures of connectedness, inclusivity and direction for the future remain stable.
  - It is notable that more than eight-in-ten (84%) agree that 'Calgary is on the right track to being a better city 10 years from now' – identical to Fall 2017 but up 7 percentage points from a tracking low in Spring 2018 (77%).
- ❖ Eight-in-ten (82%) Calgarians continue to say they do or would feel safe walking alone in their neighborhood after dark (statistically consistent over the past five years).



# Key Findings: Issue Agenda

## **“Infrastructure, traffic and roads” dominates the 2018 issue agenda and has gained prominence from one year ago.**

- ❖ Respondents were asked on an unaided (open-ended) basis to identify the most important issue facing their community.
- ❖ In Fall 2018, 40% of Calgarians cite “*infrastructure, traffic and roads*” as an important issue – up 5 percentage points from Fall 2017 (35%), while three-in-ten (29%) say it is the most important issue (consistent with 30% in Fall 2017).
  - Also higher than Fall 2017 are specific mentions of “*(lack of) snow removal*” (8% vs. 4%) and “*roads (unspecified)*” (8% vs. 3%).
- ❖ Sixteen percent of Calgarians cite “*transit*” as an important issue – down 3 percentage points from Fall 2017 (19%), while 12% say it is the most important issue (consistent with 13% in Fall 2017).
- ❖ “*Crime, safety and policing*” follows in third place with 14% of Calgarians citing it as an important issue (consistent with 13% in Fall 2017). Fewer than one-in-ten (9%) say it is the most important issue.
- ❖ Roughly one-in-ten (9%) Calgarians cite “*recreation*” as an important issue (up 2 percentage points from 7% in Fall 2017), while 4% cite the “*Olympics*” (not mentioned one year ago).



# Key Findings: Satisfaction with City Services and Programs

**Overall satisfaction with the level and quality of City services and programs is solid and unchanged from one year ago.**

- ❖ Roughly three-quarters (77%) of Calgarians say they are satisfied with the overall level and quality of services and programs provided by The City, consistent with 79% in Fall 2017.
- ❖ More than six-in-ten Calgarians are satisfied with each of the 34 services and programs assessed, with satisfaction 90% or higher for 17 services and programs, and 80% to 89% higher for another ten.
  - The lowest satisfaction ratings are for services related to transportation and infrastructure – road maintenance (64%), snow removal (67%), on-street bikeways (67%) and traffic flow management (68%).
- ❖ Statistically significant decreases from Fall 2017 are seen for satisfaction with a number of services and programs, most notably Roads and Waste & Recycling.
  - Road maintenance including pothole repairs – overall satisfaction is down 9 percentage points (64% vs. 73%), while ‘very satisfied’ ratings have dropped 5 percentage points from 2017 (17% vs. 22%) and 8 points from 2016 (25%).
  - Snow removal – overall satisfaction is down 8 percentage points (67% vs. 75%), while ‘very satisfied’ ratings are also down 8 percentage points (20% vs. 28%).
  - Spring road cleaning – overall satisfaction is down 2 percentage points (90% vs. 92%), while ‘very satisfied’ ratings have dropped 4 percentage points (42% vs. 46%).
  - Residential garbage collection service – overall satisfaction is down 3 percentage points (88% vs. 91%), while ‘very satisfied’ ratings have dropped 7 percentage points from 2017 (56% vs. 63%) and 16 percentage points from 2016 (72%).
  - Residential blue cart recycling – overall satisfaction is down 2 percentage points (91% vs. 93%), while ‘very satisfied’ ratings have dropped 5 percentage points (59% vs. 64%).





# Key Findings: Desired Investment

## **Transportation related services, affordable housing, social services and the Calgary Police Service emerge as the most desired areas for increased investment.**

- ❖ When asked if The City should invest more, less or the same amount in specific services and programs, half or more Calgarians say The City should invest more in:
  - Six Transportation services: road maintenance (64%, up 9 percentage points from 2017), snow removal (64%, up 12 percentage points from 2017), Calgary Transit (61%), traffic flow management (59%), City operated roads and infrastructure (56%, up 6 percentage points from 2017), and transportation planning (55%);
  - Affordable housing (61%);
  - Social services for individuals (60%); and,
  - Calgary Police Service (56%).
  
- ❖ Notable increases in desired investment are also seen for:
  - The Calgary Fire department (43%, up 5 percentage points);
  - 9-1-1 (40%, up 5 percentage points);
  - Downtown revitalization (31%, up 5 percentage points);
  - Spring road cleaning (30%, up 7 percentage points);
  - Residential garbage collection service (22%, up 5 percentage points); and,
  - Residential blue cart recycling (17%, up 4 percentage points);

# Key Findings: Taxation

## The perceived value of property tax dollars remains moderate, and a preference for tax increases over service cuts shows directional movement.

- ❖ Six-in-ten (59%) Calgarians give The City a 'good value' rating for the value of their property tax dollars – statistically unchanged from Fall 2017 (60%) but up 6 percentage points from Spring 2018 (53%).
  - That said, Fall measures show a slow but steady decline from 2014 (65%).
- ❖ Just over half (52%) support tax increases to maintain or expand services (consistent with 50% in 2017), while 43% support cutting services to maintain or reduce taxes (also consistent with 45% in 2017).
  - It is notable, however, that the gap between tax increases and service cuts has increased from 5 points in 2017 to 9 points in 2018, thus showing directional movement.
- ❖ Interest in knowing how property tax dollars are invested is on the rise.
  - In Fall 2018, 94% agree (up from 92% in Fall 2017) and 56% '*strongly agree*' (up from 50% in Fall 2017) 'I am interested in knowing how my property tax dollars are invested in various City services.'
  - However, just 60% (identical to Fall 2017) agree 'The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services.'



# Key Findings: Customer Service and Communications

## Perceptions about The City's customer service delivery holds strong.

- ❖ Among those who contacted or dealt with The City in the past 12 months, 78% are satisfied with the overall level and quality of customer service received, and 83% are satisfied with their most recent contact (both measures have been consistent over the past five years).
  - That said, 'very satisfied' ratings for the most recent contact are down 5 percentage points from Fall 2017 (55% vs. 60%).
- ❖ Agreement with all five statements regarding City service delivery remain solid and unchanged from Fall 2017.
  - It is interesting that there is a notable seasonal fluctuation with ratings lower in the Spring waves.

## Overall satisfaction with the quality of City information and communications remains strong but down from one year ago, while perceptions of the amount of information received from The City sees positive movement.

- ❖ In Fall 2018, 80% of Calgarians are satisfied with the overall quality of City information and communications (down 4 percentage points from 84% in Fall 2017).
  - It is notable, however, that 'very satisfied' ratings have increased 5 percentage points (22% vs. 17%), while 'somewhat satisfied' ratings are down 7 percentage points (58% vs. 65%).
  - There is also a notable seasonal fluctuation with ratings lower in the Spring waves.
- ❖ Currently, 57% of Calgarians say they have access to 'just the right amount' of information from The City (a statistically significant 6 percentage point increase from 51% in Fall 2017), while 41% say they receive 'too little' information (a statistically significant 6 percentage point decrease from 47% one year ago).

# Key Findings: City Reputation and Performance

**Results highlight an overall strengthening of The City's reputation, with both favourability and trust realizing significant gains.**

- ❖ Seven-in-ten (68%) Calgarians have a favourable impression of The City – up 4 percentage points from Fall 2017 (64%) and 5 percentage points from Spring 2018 (63%).
  - Moreover, this gain is due to an increase in 'very favourable' ratings (19% to 24%).
  - Just 6% of Calgarians have an unfavourable impression of The City.
- ❖ While overall trust (60%) remains statistically consistent with the past two waves, 'trust a *great deal*' ratings see a 3 percentage point gain from Fall 2017 (28%) and a 6 percentage point gain from Spring 2018 (25%).
  - Distrust of The City remains consistent at 14%.
- ❖ One-third (34%) of Calgarians are advocates of The City (on par with Fall 2017 but up 4 percentage points from Spring 2018), while 12% are critics (on par with Fall 2017 but down 3 points from Spring 2018).

**Satisfaction with City Administration's performance is up from Fall 2017, and perceptions related to citizen input remain moderate and consistent with one year ago.**

- ❖ Eight-in-ten citizens (79%, consistent with the past two waves) are satisfied with the way The City as a whole is running the city, while this increases to 84% for City Administration (up 3 percentage points from Fall 2017) and drops to 70% for City Council (on par with Fall 2017 but up 5 percentage points from Spring 2018).
- ❖ Three-quarters (74%) of Calgarians are confident that The City is working to improve how it uses citizen input (consistent with the past two waves), while 70% agree The City uses citizen input in decision-making (on par with Fall 2017 but up 5 percentage points from Spring 2018), and 67% agree The City allows citizens to have meaningful input (on par with Fall 2017 but up 6 percentage points from Spring 2018).

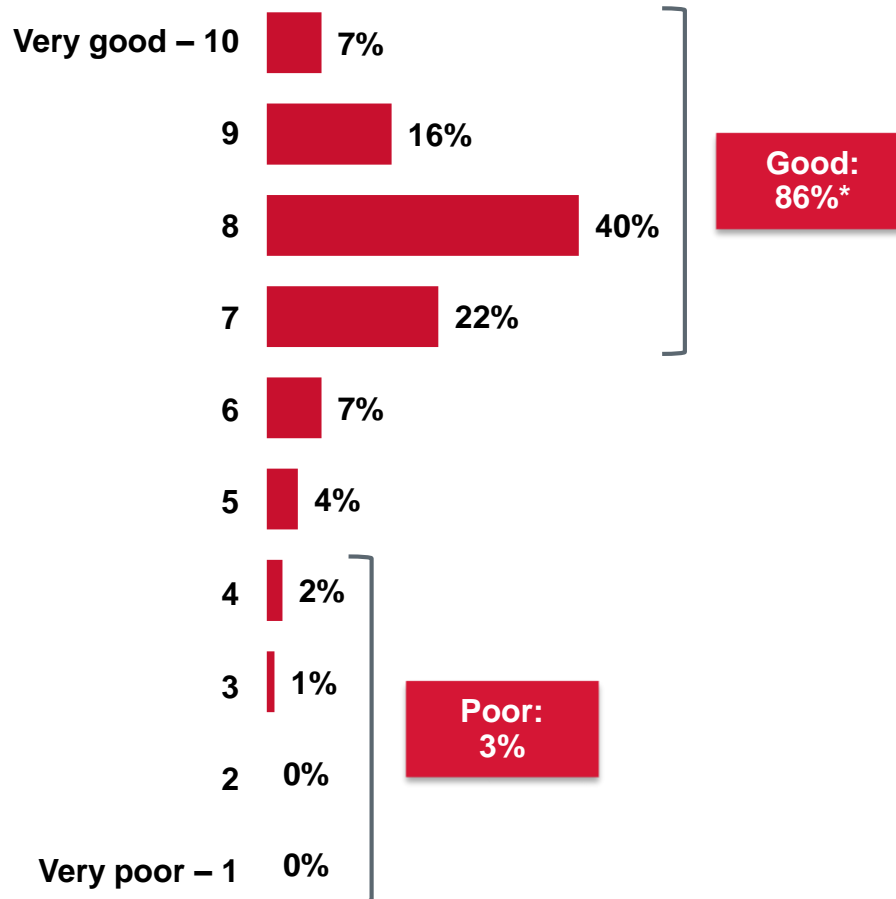


## Quality of Life





# Overall Quality of Life in Calgary



Good	
Fall 2018:	86%
Spring 2018:	82%
Fall 2017:	85%
Spring 2017:	83%
2016:	83%
2015:	86%
2014:	87%
2013:	88%
2012:	88%
2011:	83%
2010:	78%
2009:	76%
2008:	69%
2007:	67%

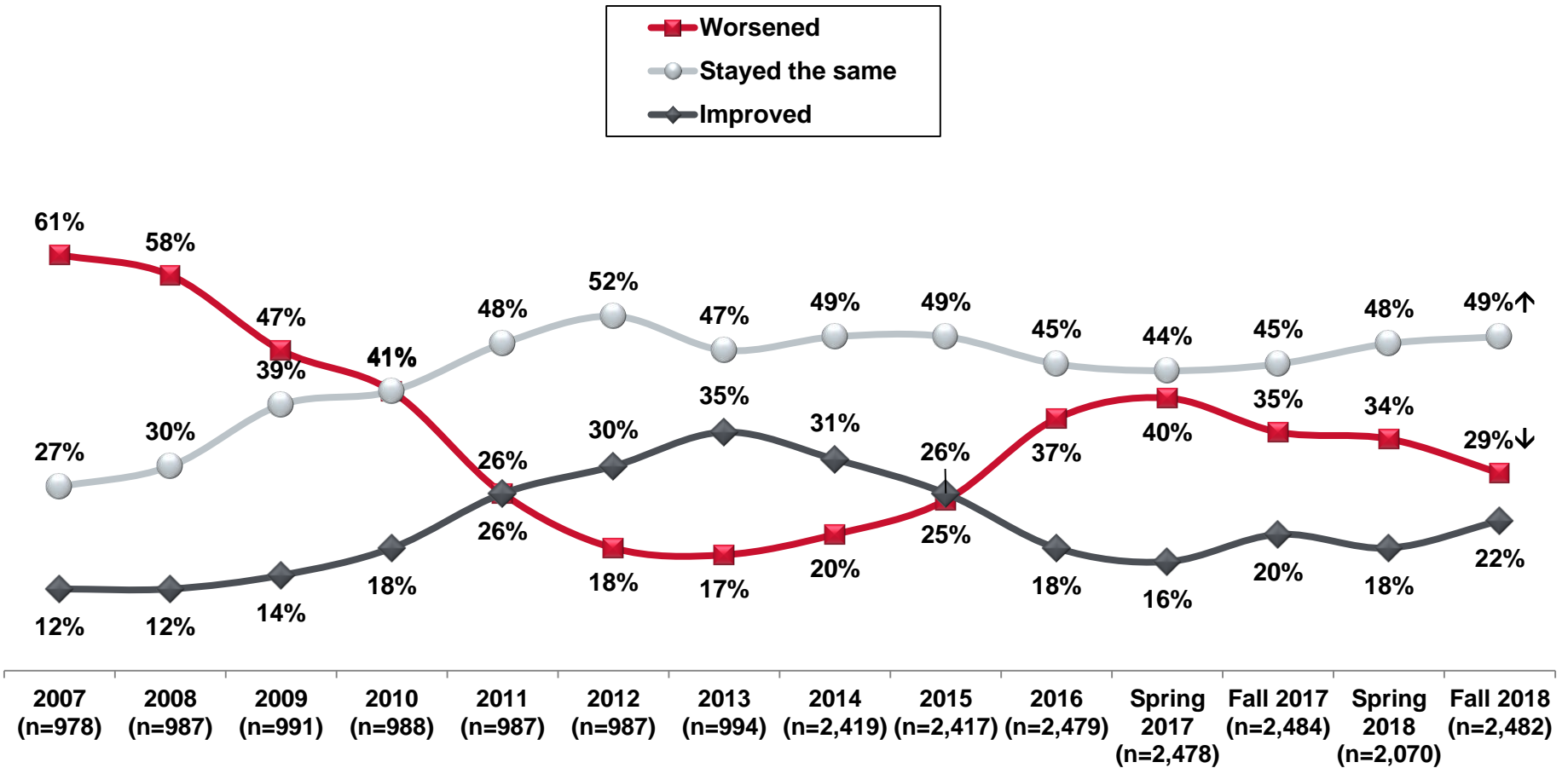
On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in the city of Calgary today?

Base: Valid respondents (n=2,497)

\*Rounding



# Perceived Change in the Quality of Life



↑ Statistically higher than Fall 2017  
 ↓ Statistically lower than Fall 2017

And, do you feel that the quality of life in the city of Calgary in the past three years has ...?  
 Base: Valid respondents



# Actions to Improve the Quality of Life

Multiple Responses

Change  
Fall 2017 –  
Fall 2018

<b>Transportation [NET]</b>	<b>27%</b>	<b>+3↑</b>
Improvement/ maintenance of existing roads	10%	+2↑
Better traffic management	6%	-
<b>Recreation &amp; Community Services [NET]</b>	<b>21%</b>	<b>+1</b>
Parks/ green-space improvement	4%	-1
Building of community centres/ recreation facilities	4%	+1
Availability of (free) programs/ activities/ services	4%	+1
Engage in community events/ activities	4%	+1
<b>Homelessness, Poverty &amp; Affordable Housing [NET]</b>	<b>20%</b>	<b>+1</b>
Improve job creation/ employment	9%	+1
Expand affordable housing/ rent	4%	-
<b>Government [NET]</b>	<b>19%</b>	<b>-2</b>
Reduce taxes	8%	-
Tax spending/ city budget	5%	-2
<b>Transit [NET]</b>	<b>15%</b>	<b>-1</b>
Improve public transportation (unspecified)	10%	+1
More access to buses/ transit/ trains	5%	+1
<b>Crime, Safety &amp; Policing [NET]</b>	<b>11%</b>	<b>-</b>
Control crime and safety	5%	-1
More policing/ patrolling	5%	-
<b>Health [NET]</b>	<b>4%</b>	<b>-</b>
<b>Environment [NET]</b>	<b>4%</b>	<b>-</b>
<b>Education [NET]</b>	<b>3%</b>	<b>-1</b>
<b>Growth &amp; Planning [NET]</b>	<b>3%</b>	<b>-</b>
<b>Other</b>	<b>13%</b>	
<b>Nothing</b>	<b>17%</b>	

NET mentions <3%  
are not shown

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

Thinking about all of the different things that contribute to the quality of life in Calgary, what specific actions do you think The City of Calgary could take to improve the quality of life?

Base: Valid respondents (n=2,391)



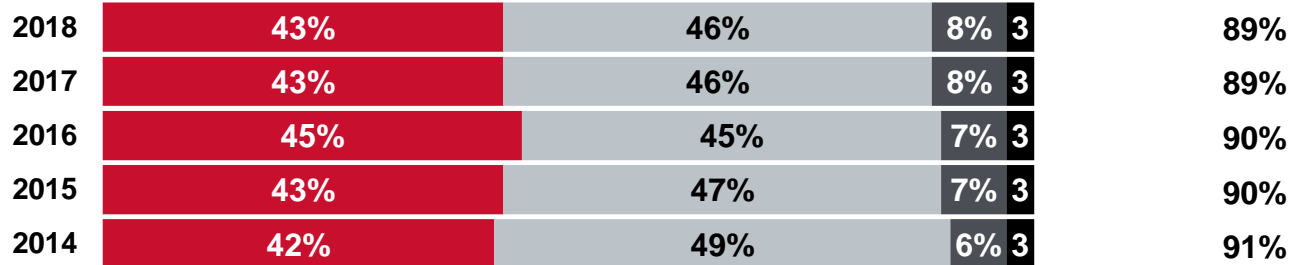


# Sustainability: Connectedness

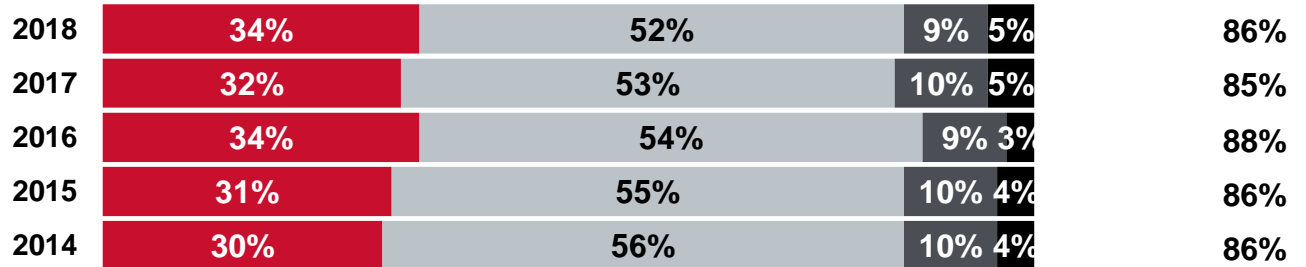
**% Agree**

■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

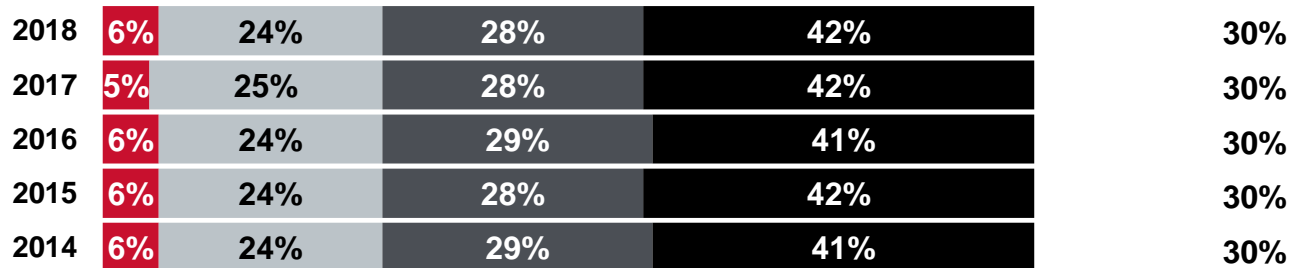
I am proud to be a  
Calgarian



I am proud to live in my  
neighbourhood



I am regularly involved in  
neighbourhood and local  
community events



All waves conducted in the Fall

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)

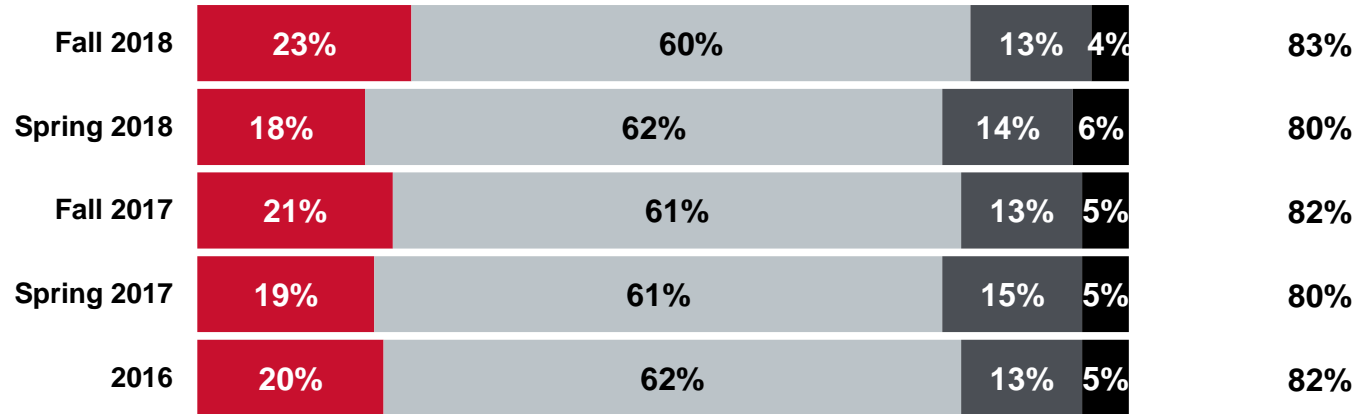


# Sustainability: Making a Life and Making a Living

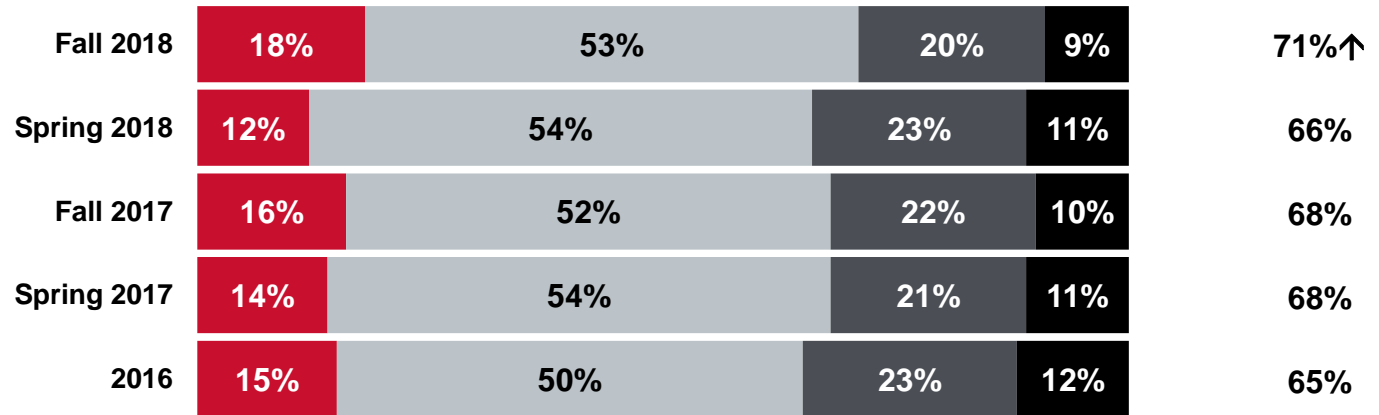
■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

% Agree

Calgary is a great place to make a life



Calgary is a great place to make a living



↑Statistically higher than Fall 2017

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)

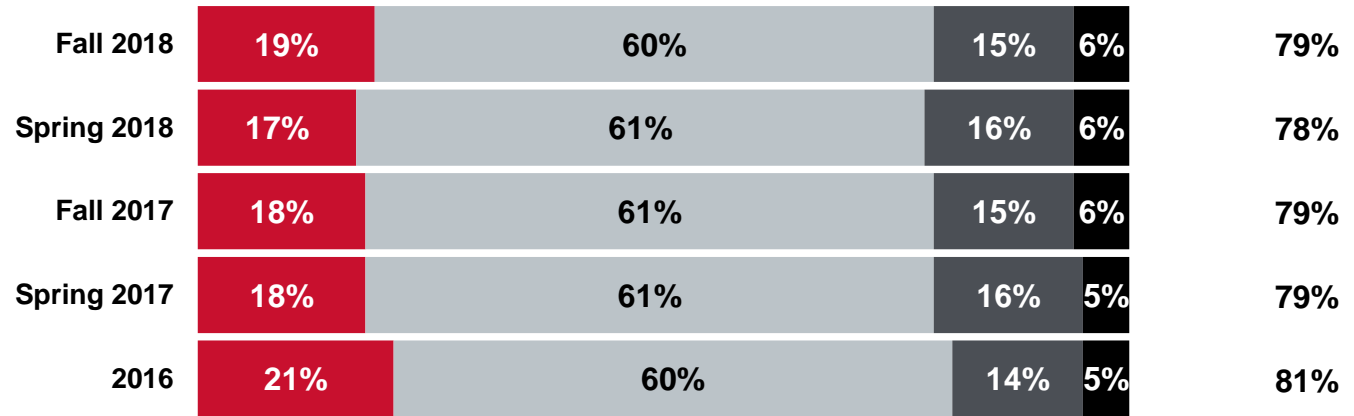


# Sustainability: Inclusivity and Direction for the Future

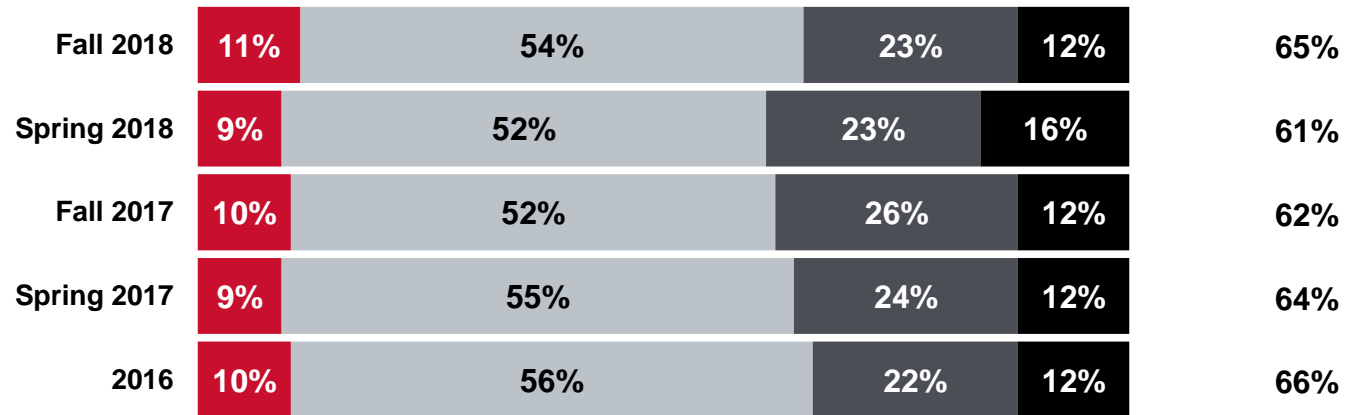
■ Completely Agree (10) ■ Agree (9, 8 or 7) ■ Neutral (6 or 5) ■ Disagree (4, 3, 2 or 1)

**% Agree**

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



Calgary is moving in the right direction to ensure a high quality of life for future generations

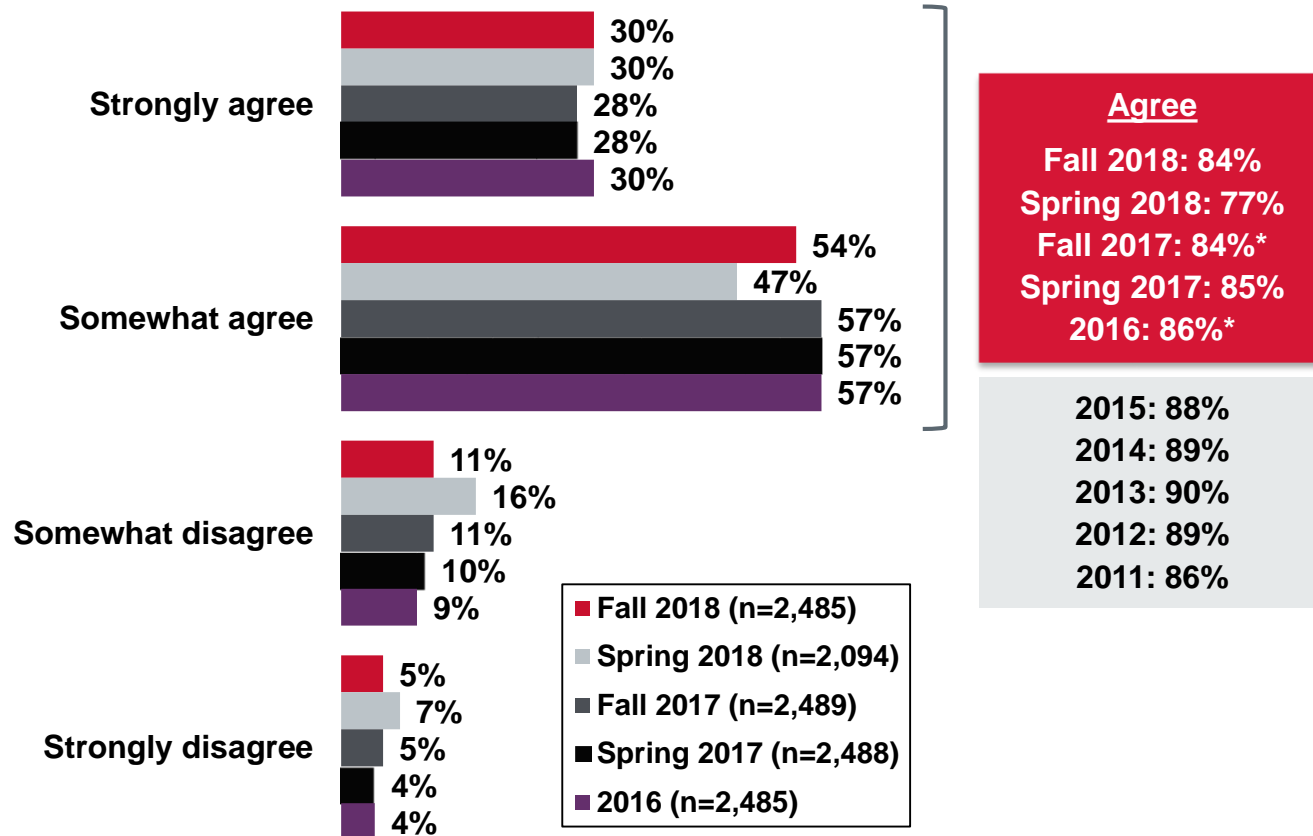


Next, I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate whether you agree or disagree with each statement using a scale from 1 to 10, where "1" is "completely disagree" and "10" is "completely agree."

Base: Valid respondents (Bases vary)



# Calgary: On the Right Track to Being a Better City?



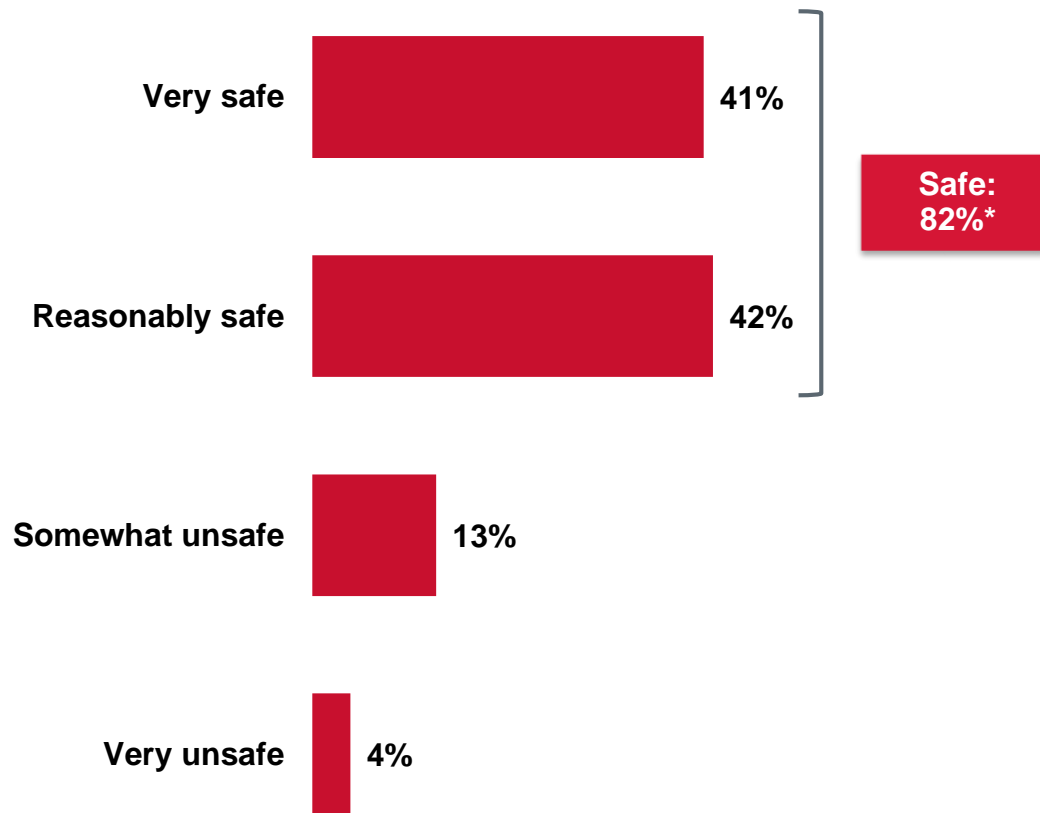
\*Rounding

There are a wide array of challenges facing The City of Calgary today, but also many success stories. Please indicate whether you agree or disagree with the following statement about Calgary's future: Calgary is on the right track to be a better city 10 years from now.

Base: Valid respondents



# Perceived Safety in Own Neighbourhood



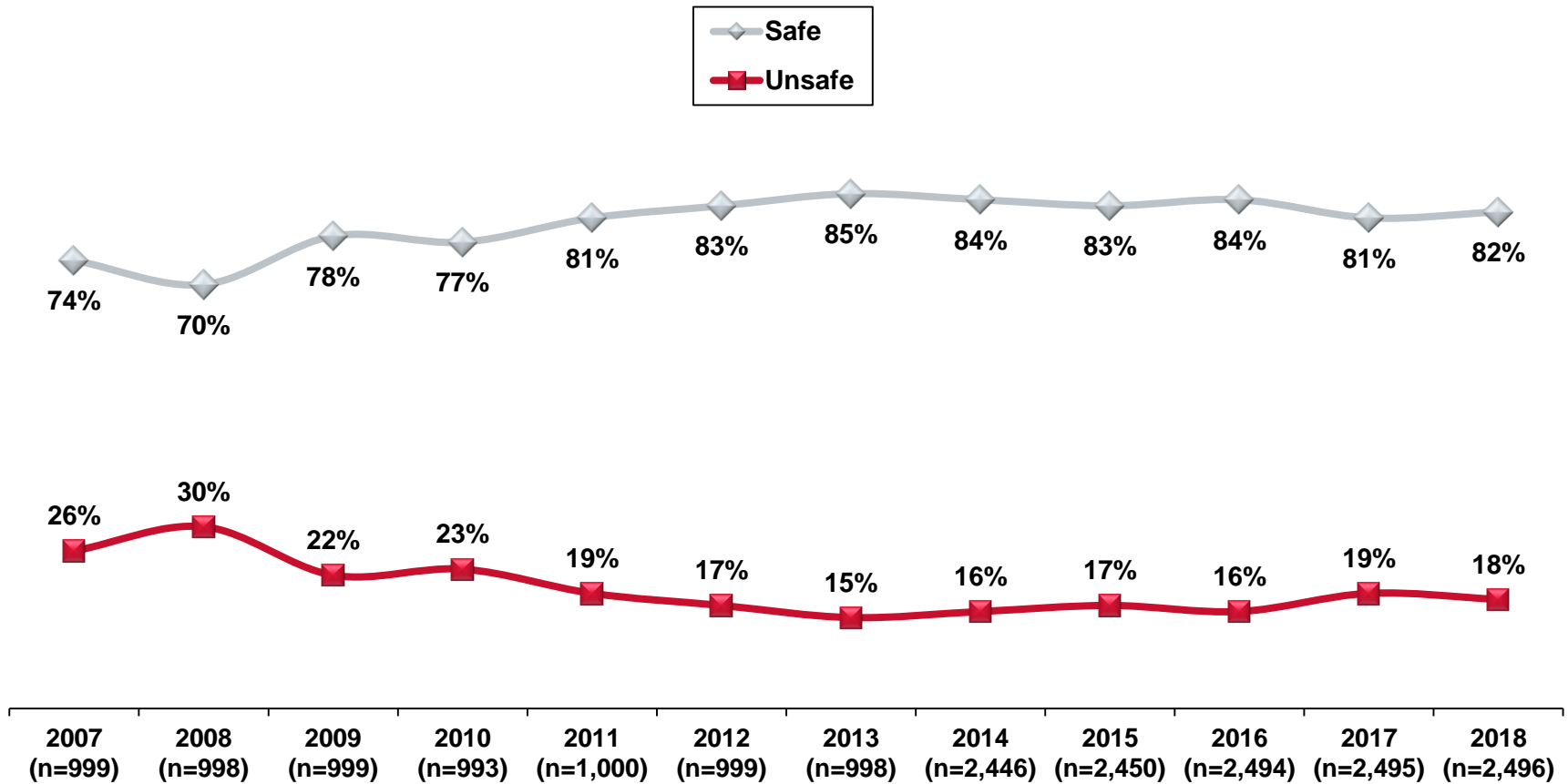
\*Rounding

*How safe do you feel or would you feel walking alone in your neighbourhood after dark?*

Base: Valid respondents (n=2,496)



# Tracking Perceived Safety in Own Neighbourhood



All waves conducted in the Fall

How safe do you feel or would you feel walking alone in your neighbourhood after dark?

Base: Valid respondents



## Issue Agenda





# Issue Agenda

Multiple Responses

■ First Mention ■ Other Mentions

Change  
Fall 2017 –  
Fall 2018

Issue	First Mention	Other Mentions	NET	Change
<b>Infrastructure, Traffic &amp; Roads [NET]</b>	29%	11%	40%	+5↑
Traffic congestion	7%	9%		-1
(Lack of) snow removal	5%	3%	8%	+4↑
Roads (unspecified)	6%	8%		+5↑
Road conditions	3%	3%	6%	-1
<b>Transit [NET]</b>	12%	4%	16%	-3↓
Transportation (unspecified)	7%	9%		+2↑
Public Transportation (incl. buses/ C-train/ poor service)	5%	7%		-4↓
<b>Crime, Safety &amp; Policing [NET]</b>	9%	5%	14%	+1
Recreation [NET]	5%	4%	9%	+2↑
Taxes [NET]	5%	3%	8%	-
<b>Environment &amp; Waste Management [NET]</b>	3%	4%	7%	-
Education [NET]	4%	3%	7%	+1
Economy [NET]	4%	5%		-1
<b>Homelessness, Poverty &amp; Affordable Housing [NET]</b>	3%	5%		-
Budget & Spending [NET]	2%	4%		-
Growth & Planning [NET]	3%	4%		-
Olympics [NET]	2%	4%		+4↑
Other			18%	
None			16%	

NET mentions <4%  
are not shown

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

↑ Statistically higher  
↓ Statistically lower

*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?*

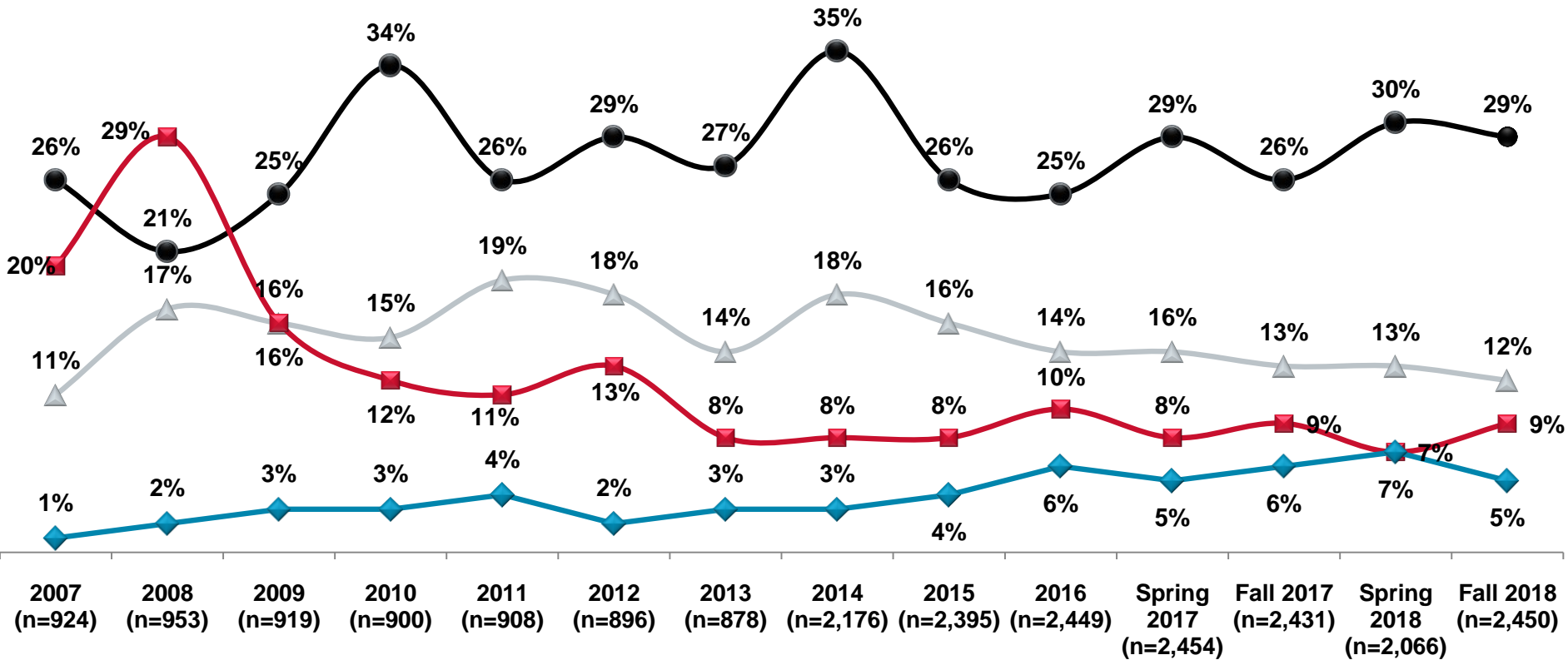
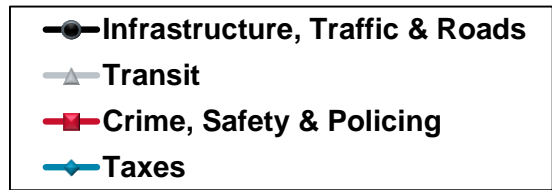
Base: Valid respondents (n=2,454)





# Tracking Most Important Issue Facing Calgary

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

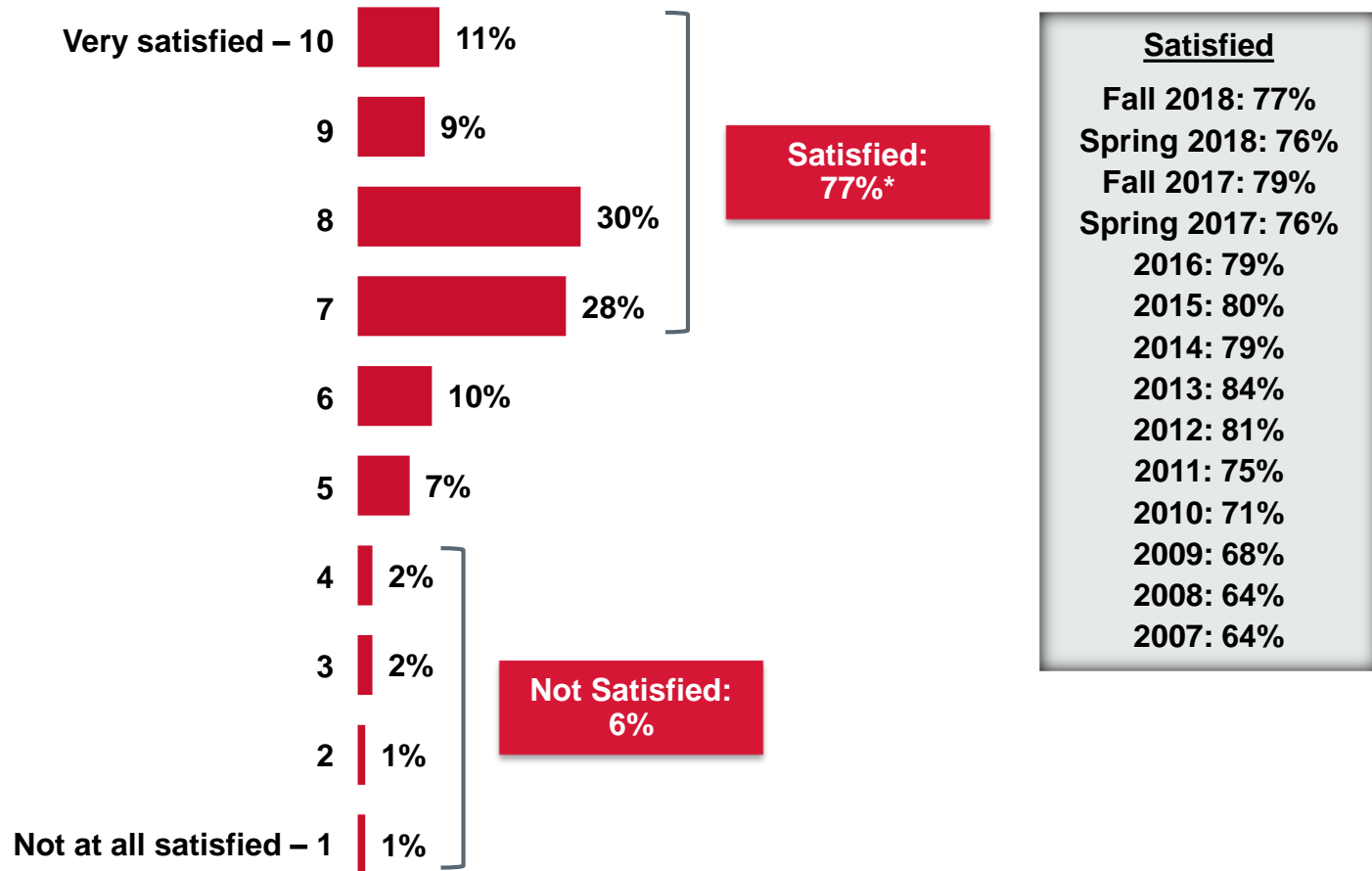


## City Programs and Services





# Satisfaction with the Overall Level and Quality of City Services and Programs



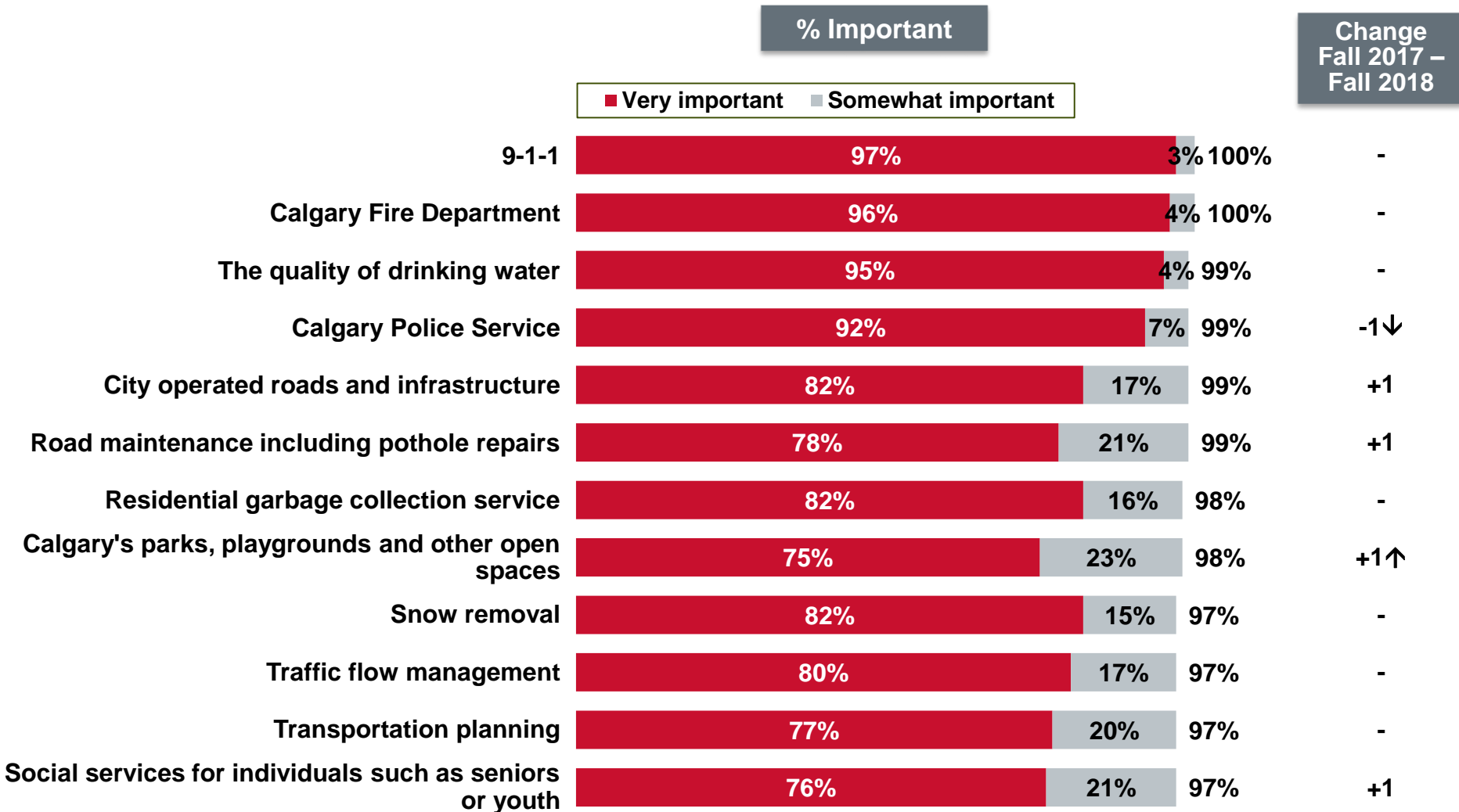
On a scale from “1” to “10” where “1” represents “not at all satisfied” and “10” represents “very satisfied,” how satisfied are you with the overall level and quality of services and programs provided by The City of Calgary?

Base: Valid respondents (n=2,488)

\*Rounding



# Importance of City Programs and Services



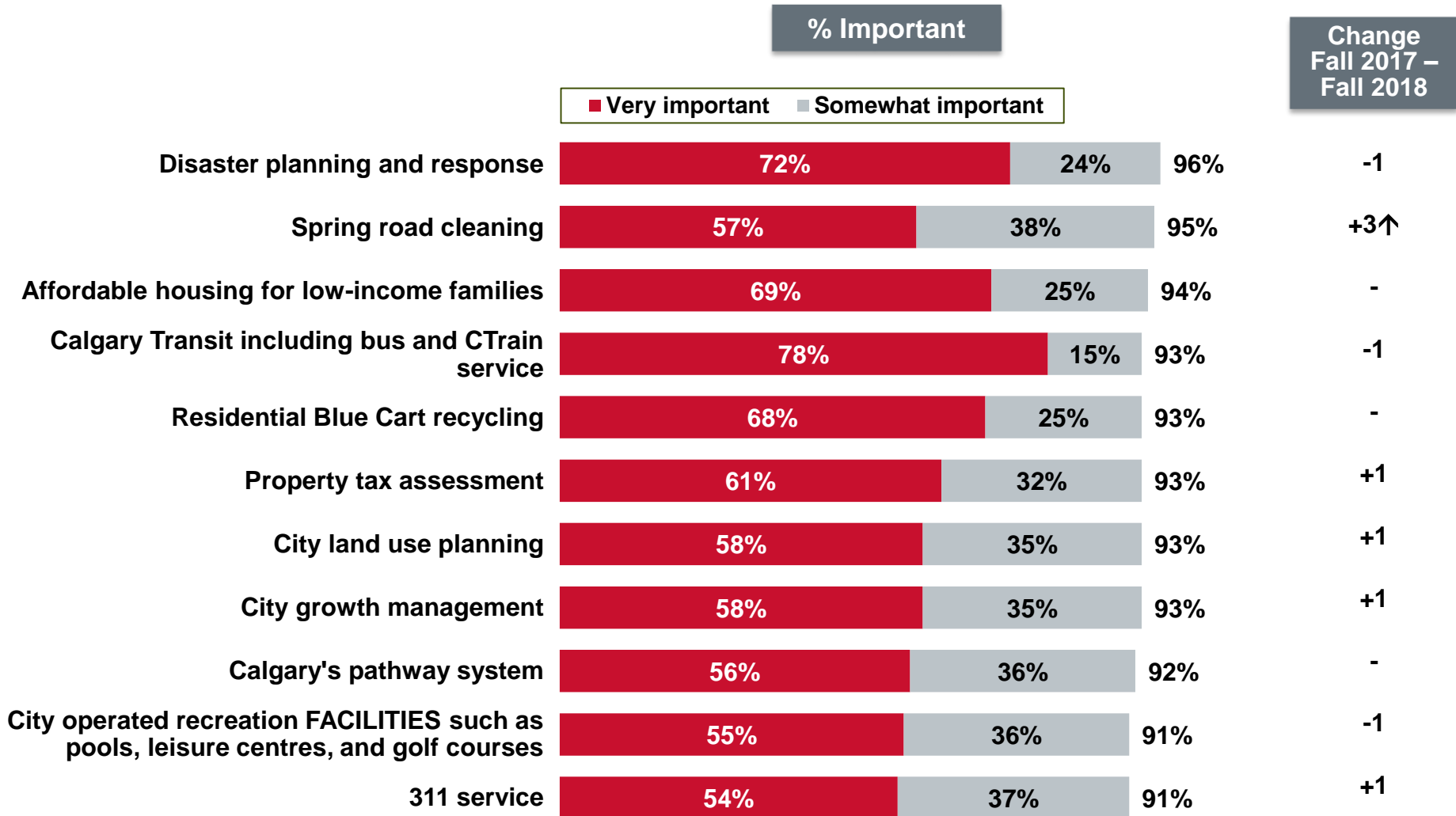
*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)

↑ Statistically higher  
↓ Statistically lower



# Importance of City Programs and Services (continued)



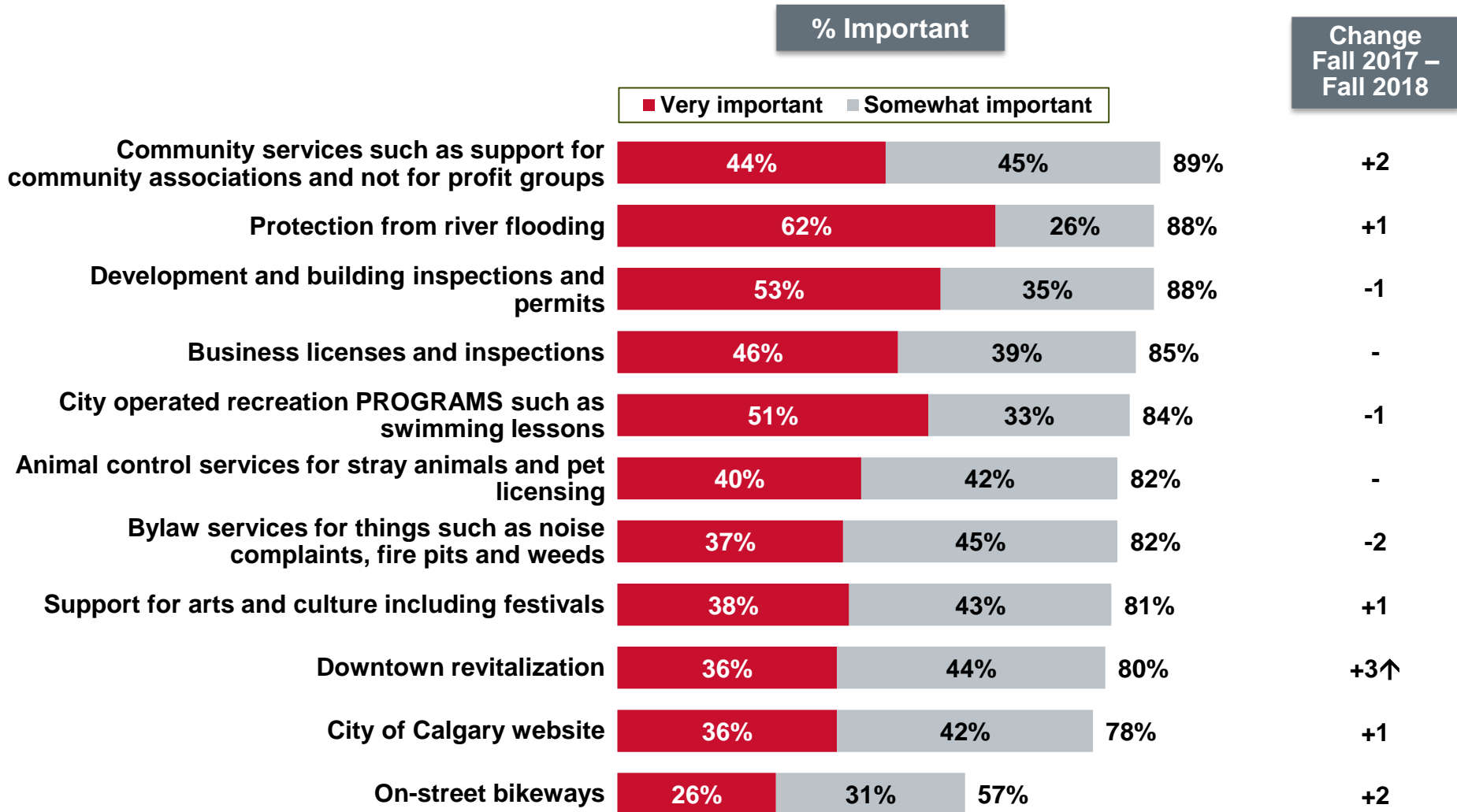
↑ Statistically higher

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)



# Importance of City Programs and Services (continued)



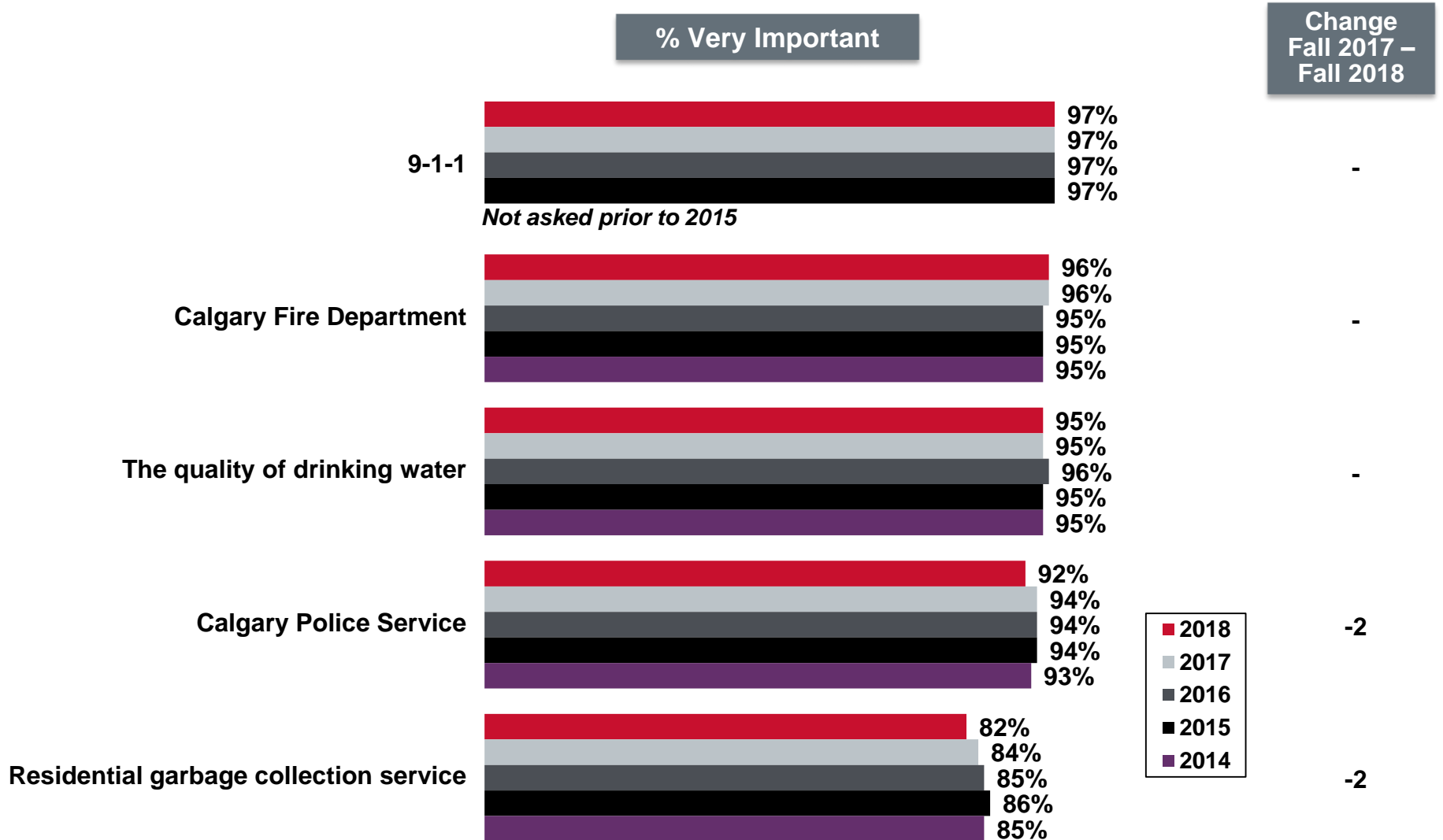
↑ Statistically higher

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.*

Base: Valid respondents (Bases vary)



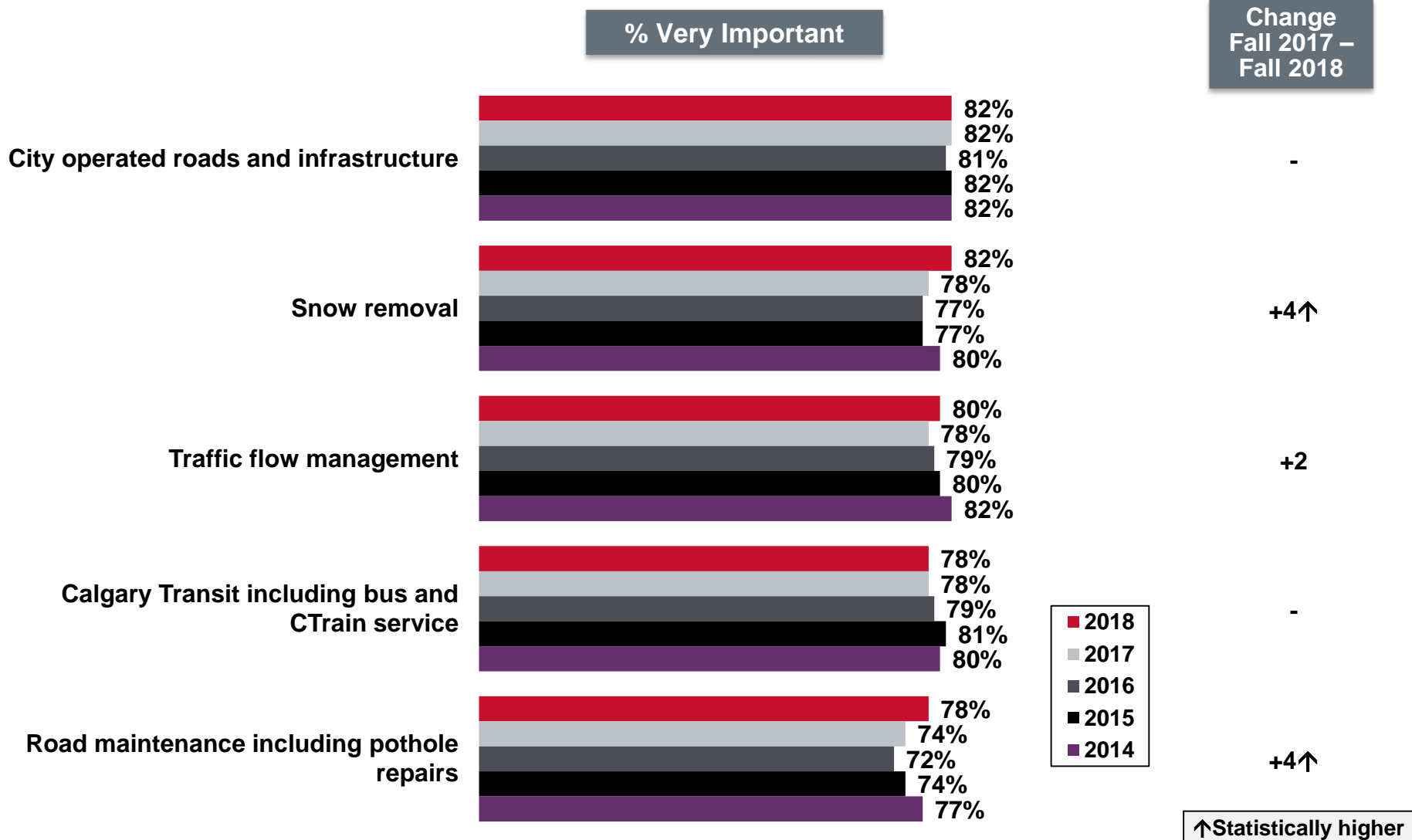
# Tracking Importance of City Programs and Services



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



# Tracking Importance of City Programs and Services (continued)



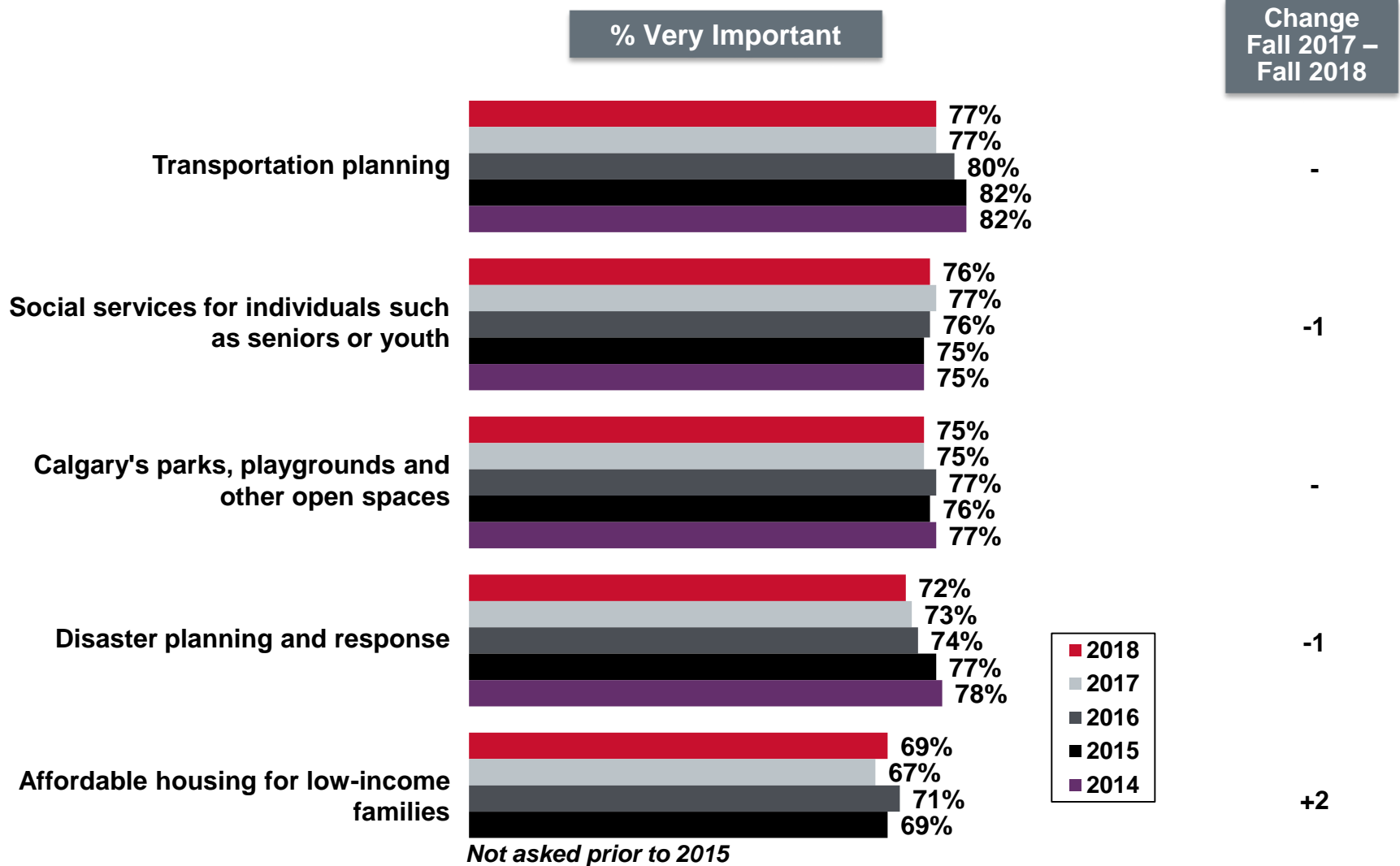
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)





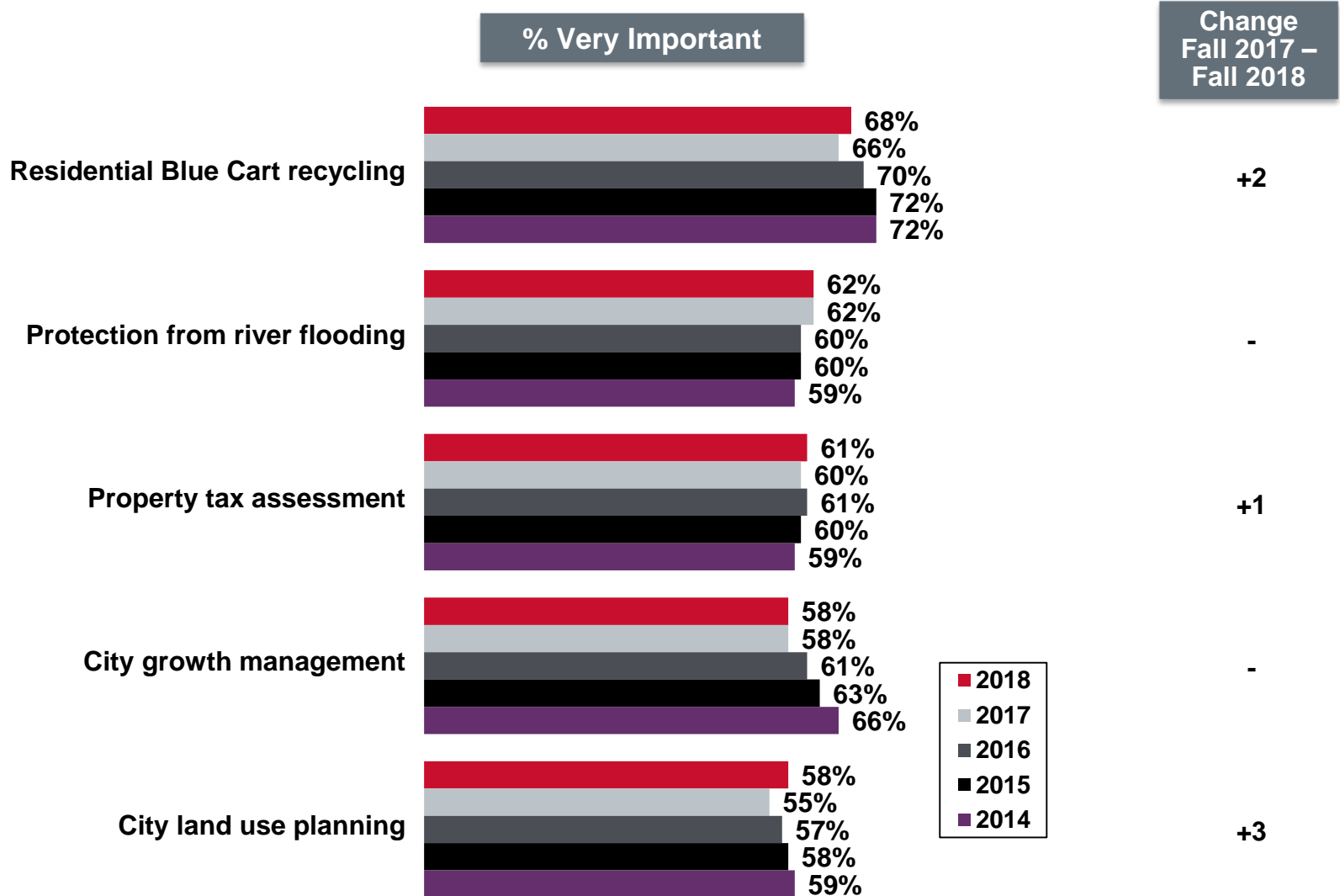
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



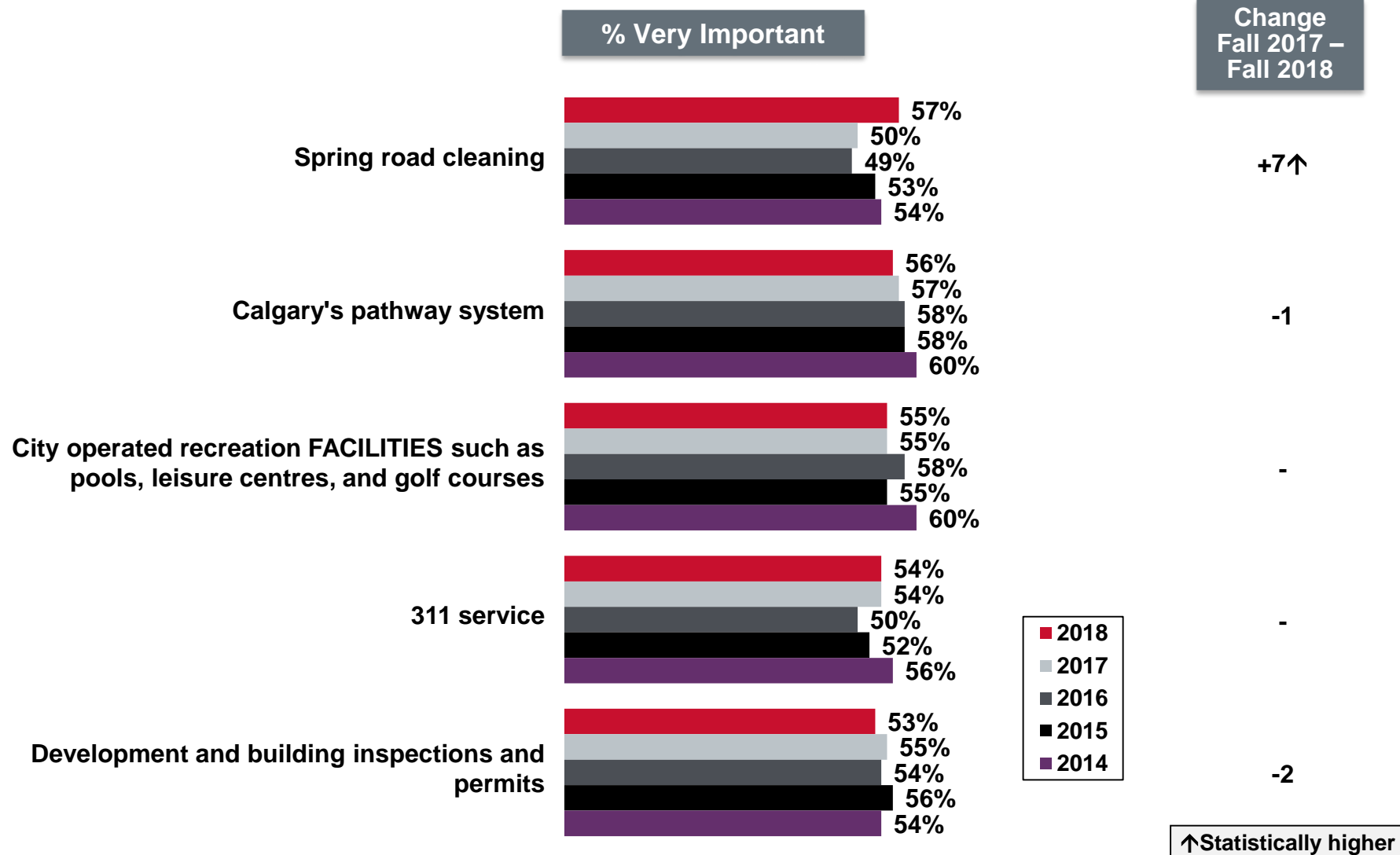
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



# Tracking Importance of City Programs and Services (continued)

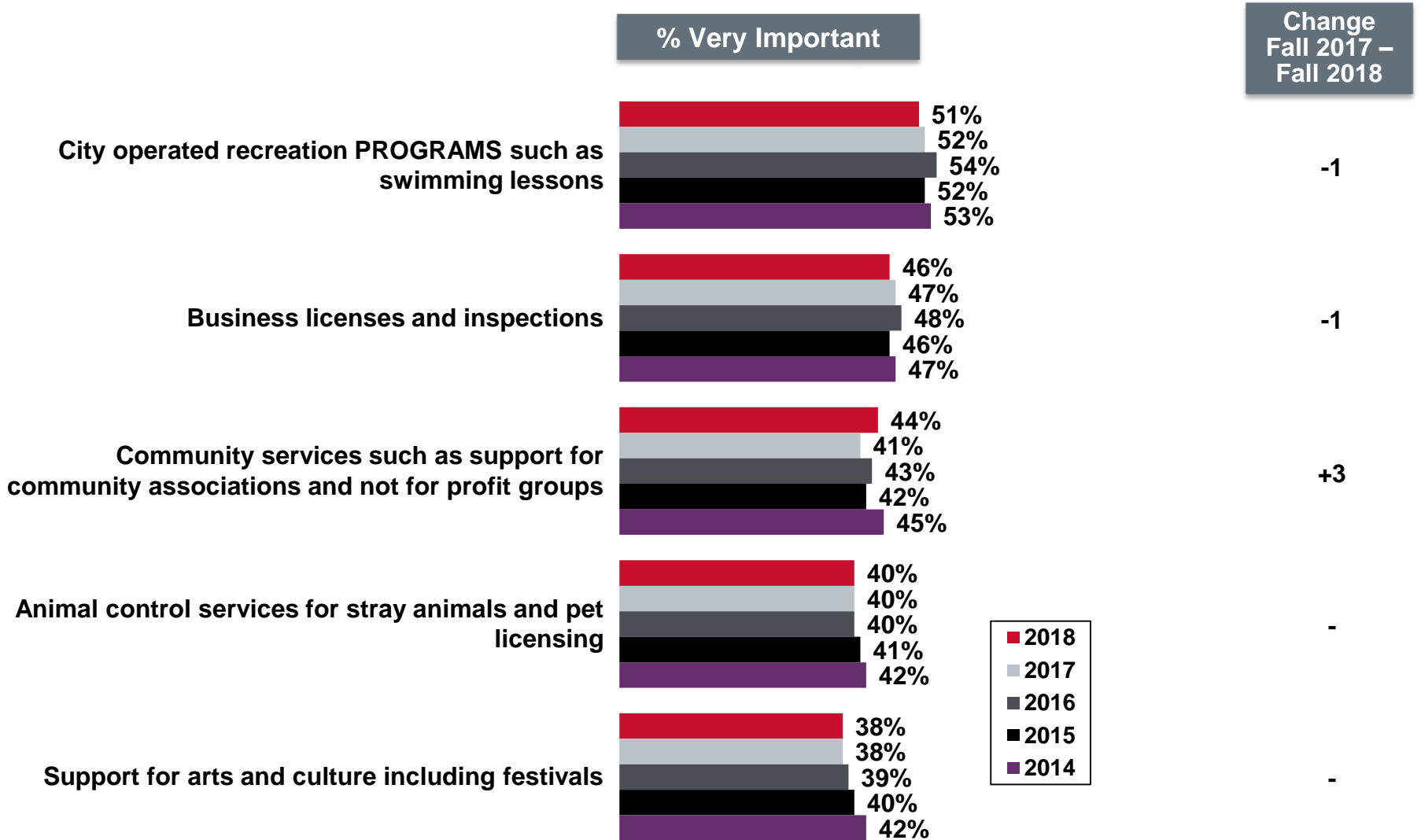


I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.

Base: Valid respondents (Bases vary)



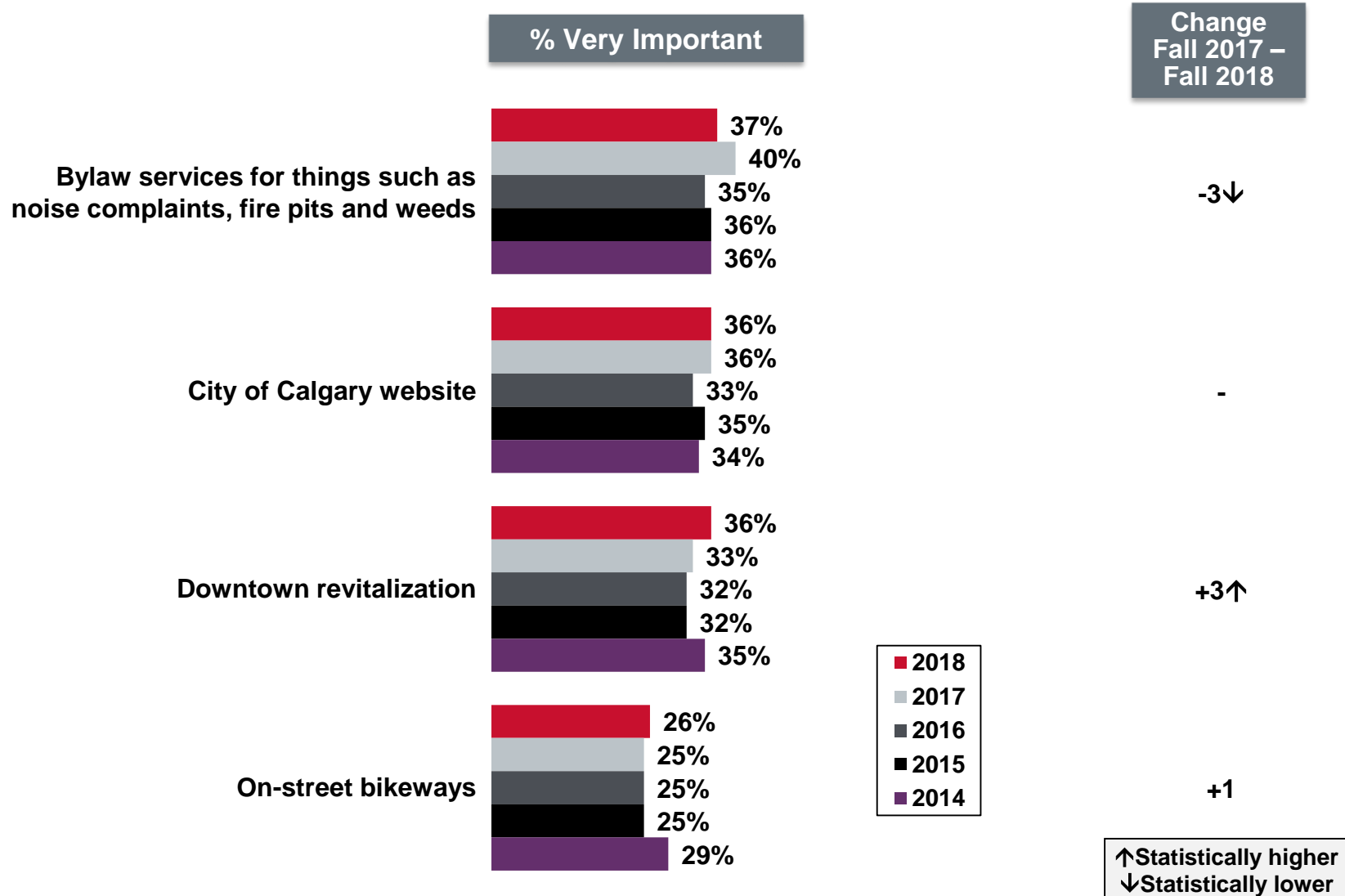
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



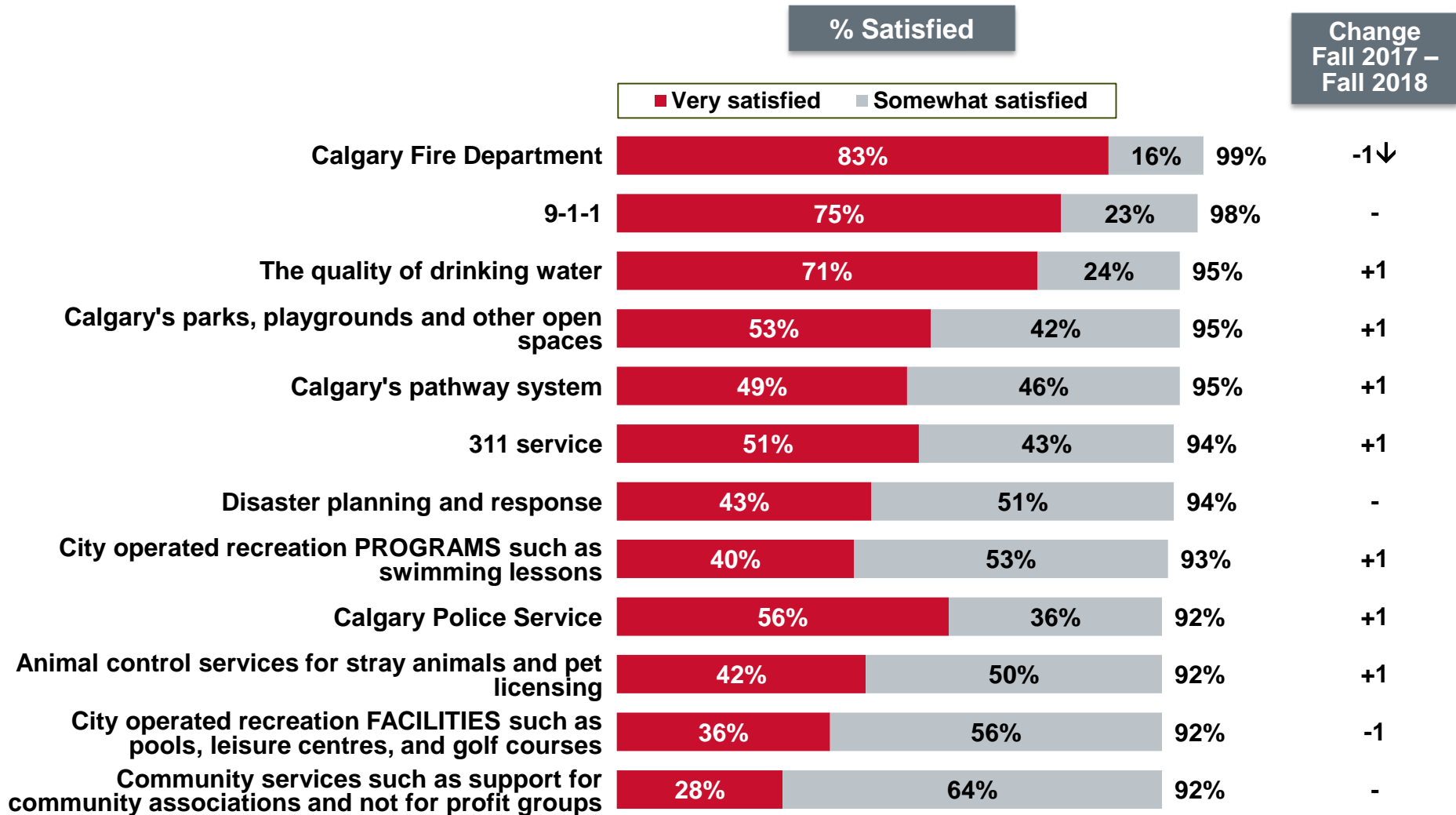
# Tracking Importance of City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how important each one is to you.  
 Base: Valid respondents (Bases vary)



# Satisfaction with City Programs and Services

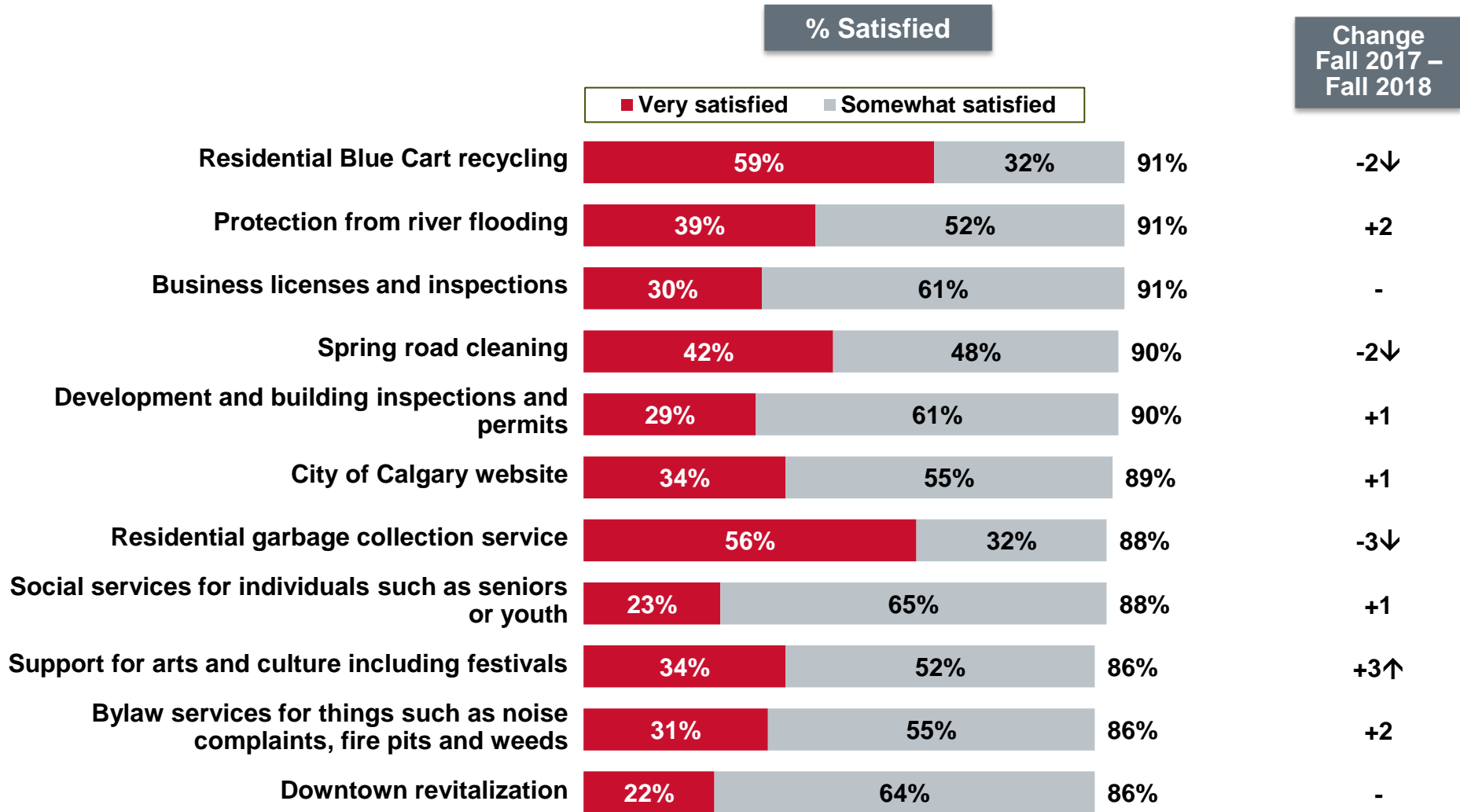


↓ Statistically lower

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
 Base: Valid respondents (Bases vary)



# Satisfaction with City Programs and Services (continued)

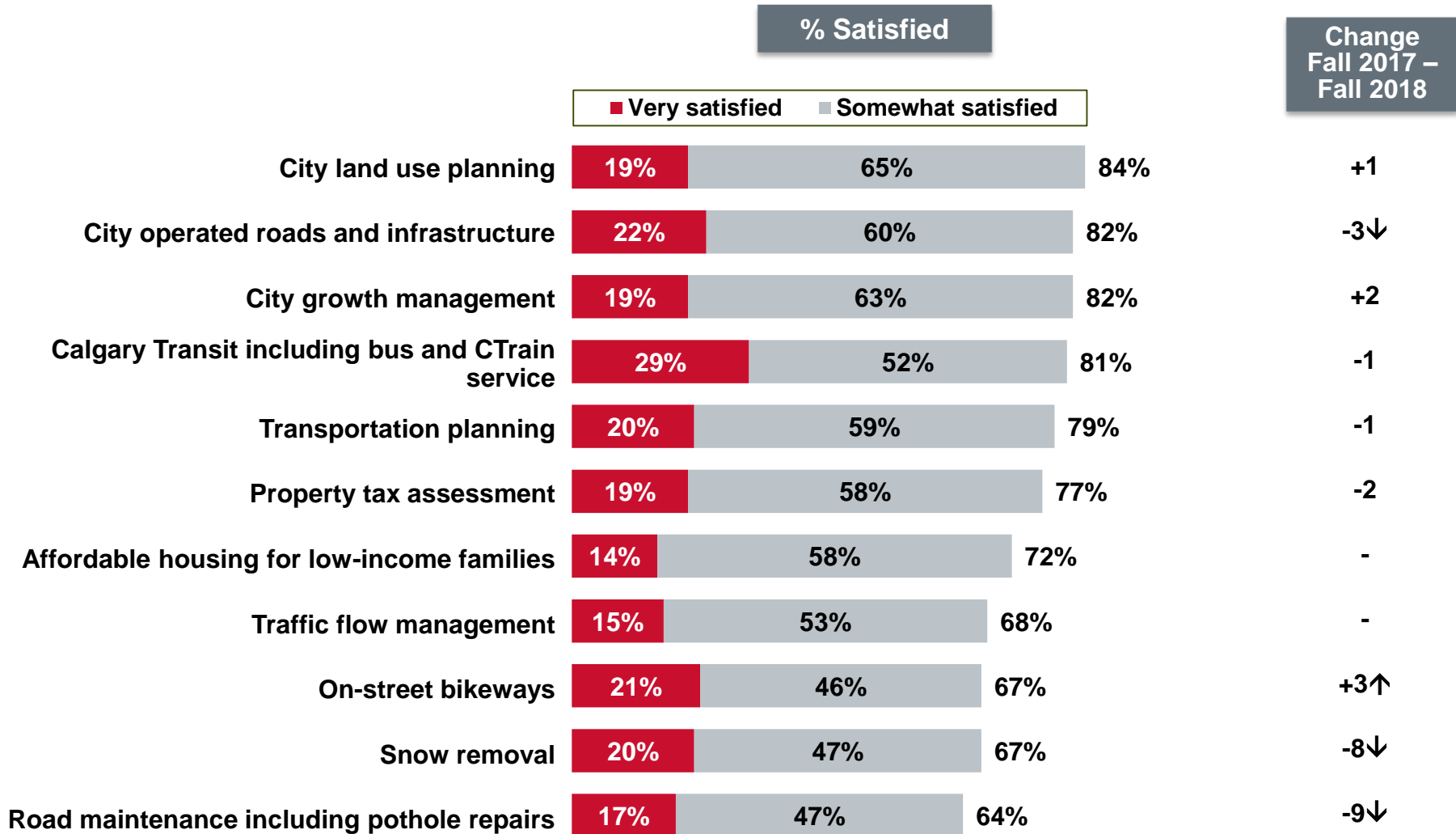


↑ Statistically higher  
↓ Statistically lower

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
Base: Valid respondents (Bases vary)



# Satisfaction with City Programs and Services (continued)



↑ Statistically higher  
↓ Statistically lower

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)*

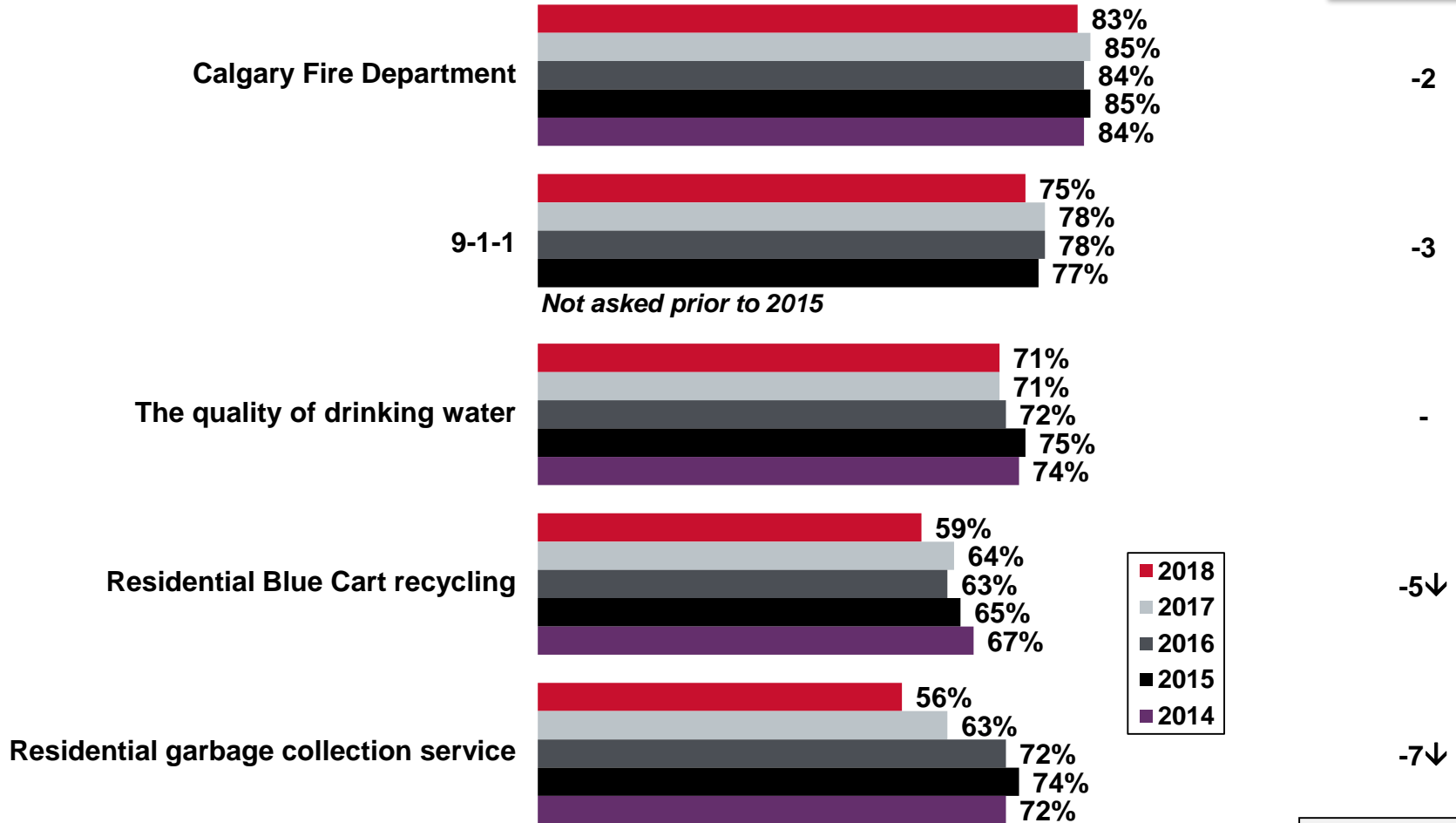




# Tracking Satisfaction with City Programs and Services

% Very Satisfied

Change  
Fall 2017 –  
Fall 2018

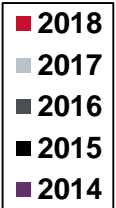
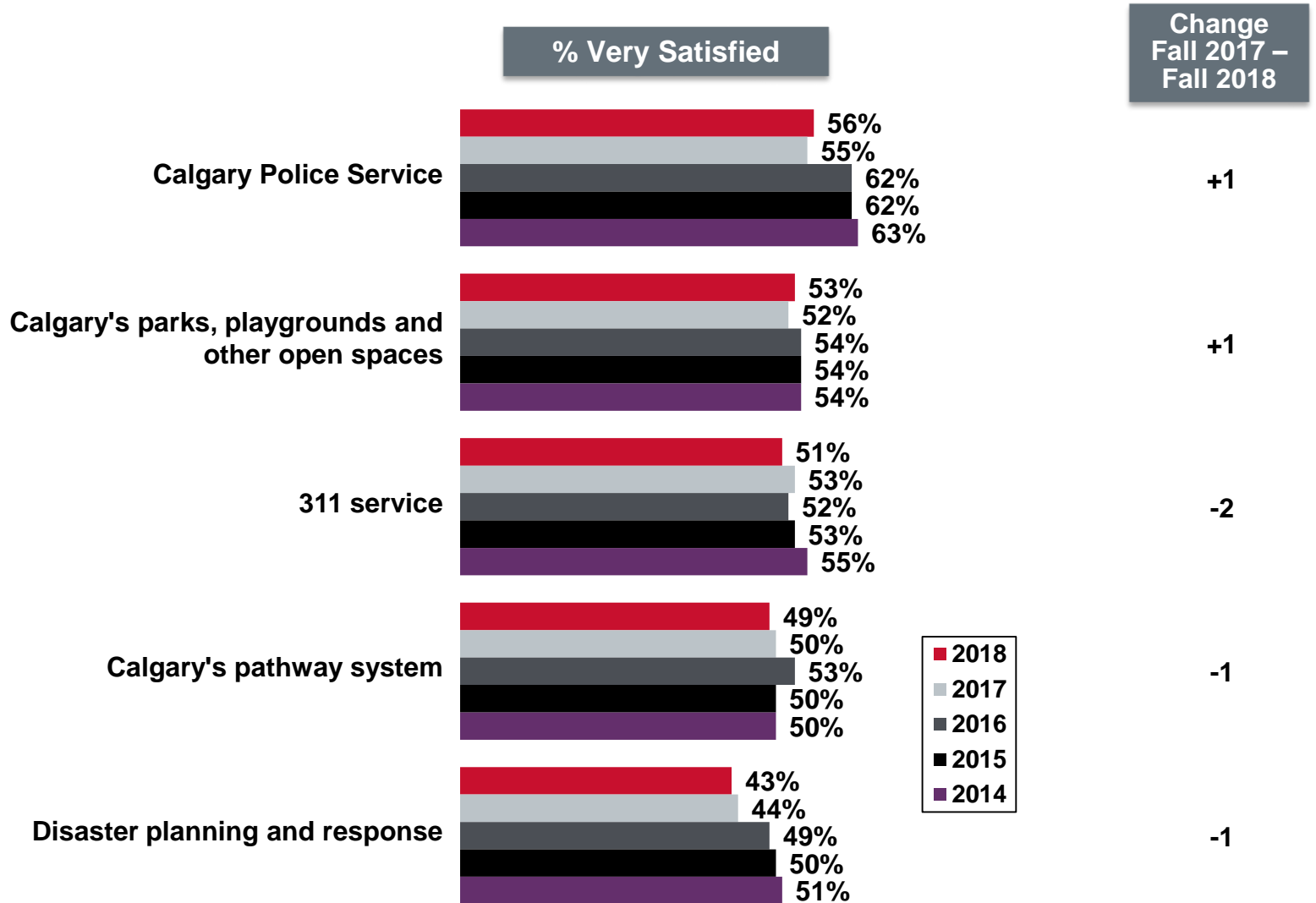


↓ Statistically lower

*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
Base: Valid respondents (Bases vary)



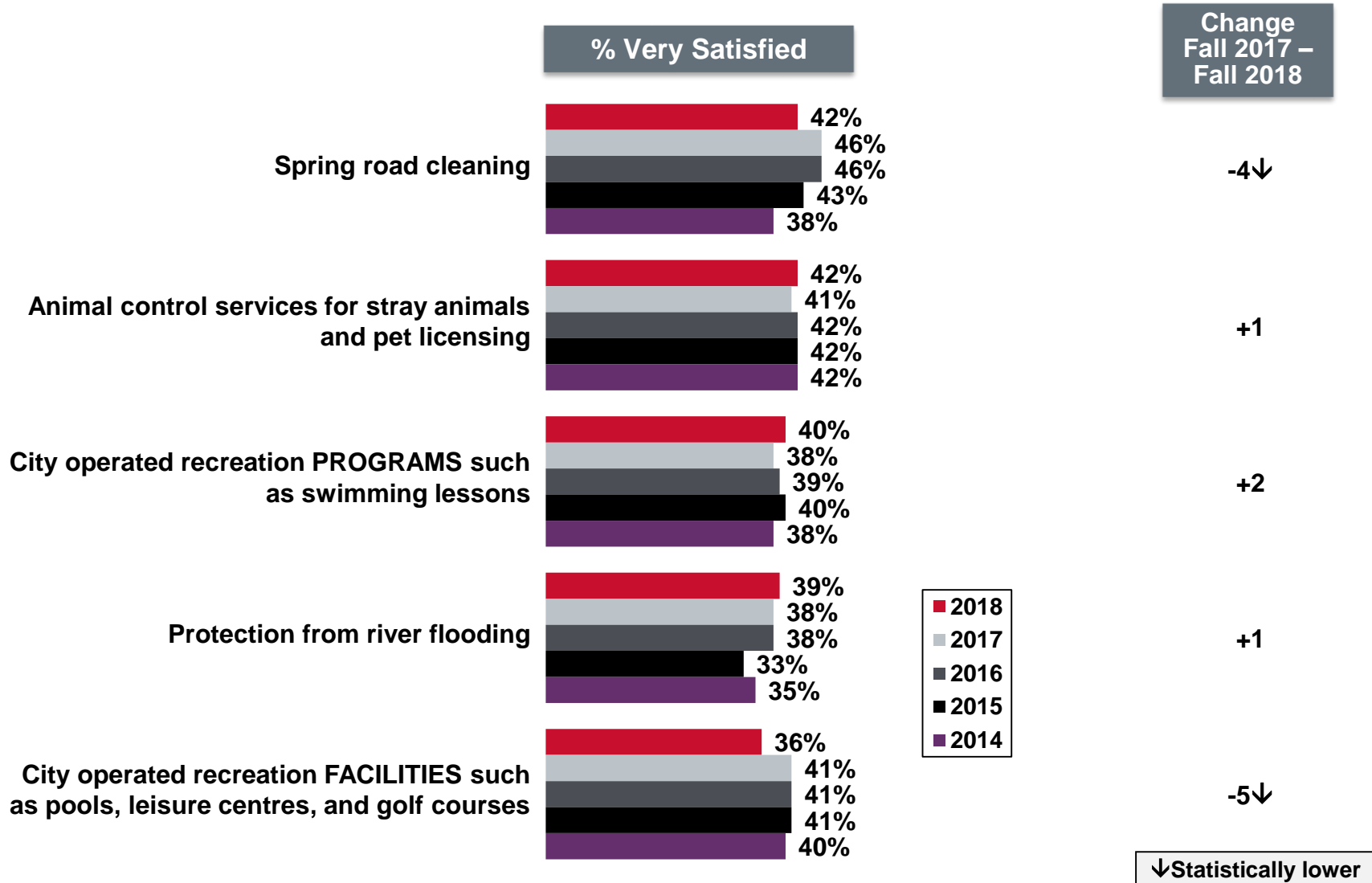
# Tracking Satisfaction with City Programs and Services (continued)



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
 Base: Valid respondents (Bases vary)



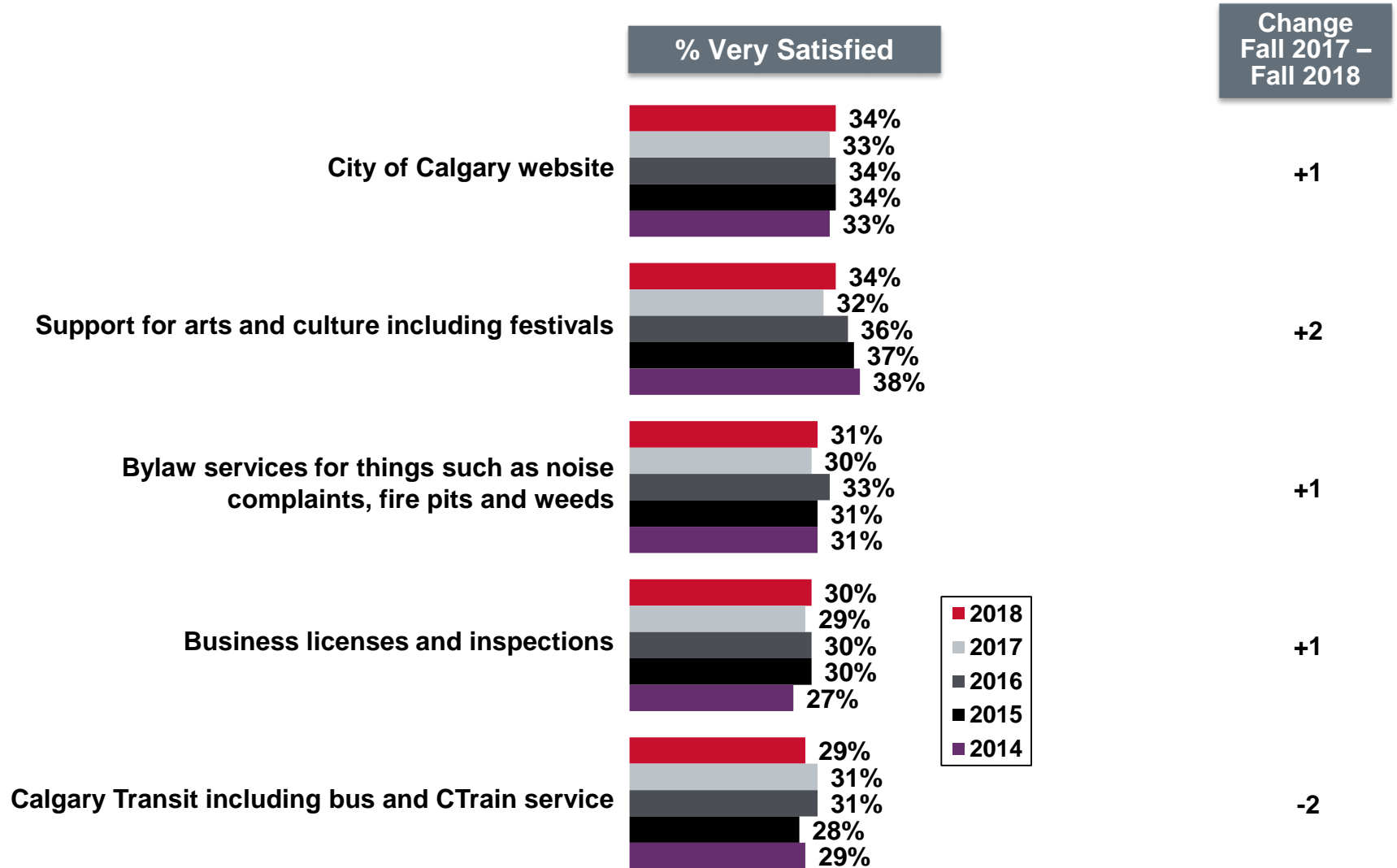
# Tracking Satisfaction with City Programs and Services (continued)



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
 Base: Valid respondents (Bases vary)



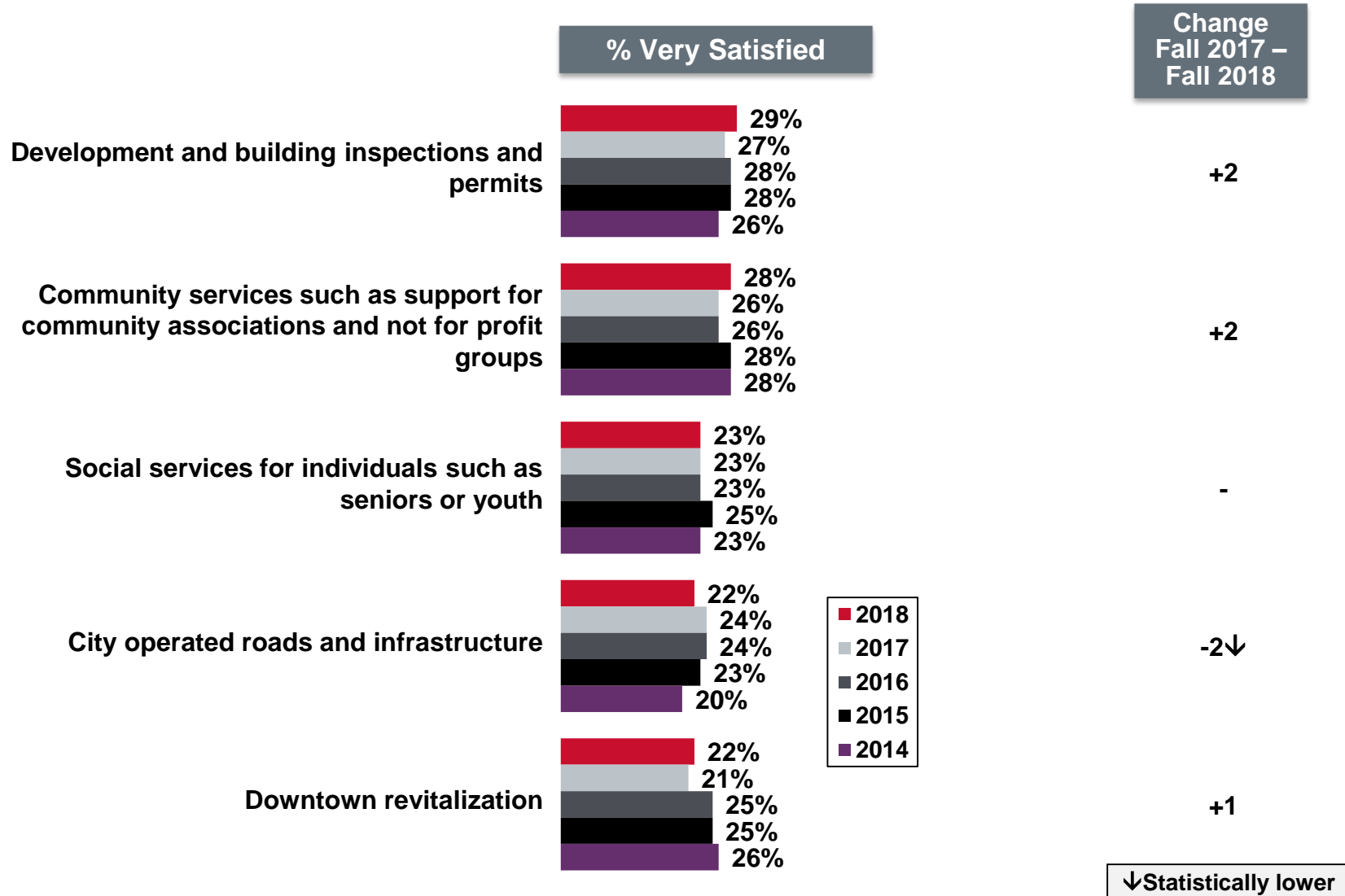
# Tracking Satisfaction with City Programs and Services (continued)



*I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service.*  
 Base: Valid respondents (Bases vary)



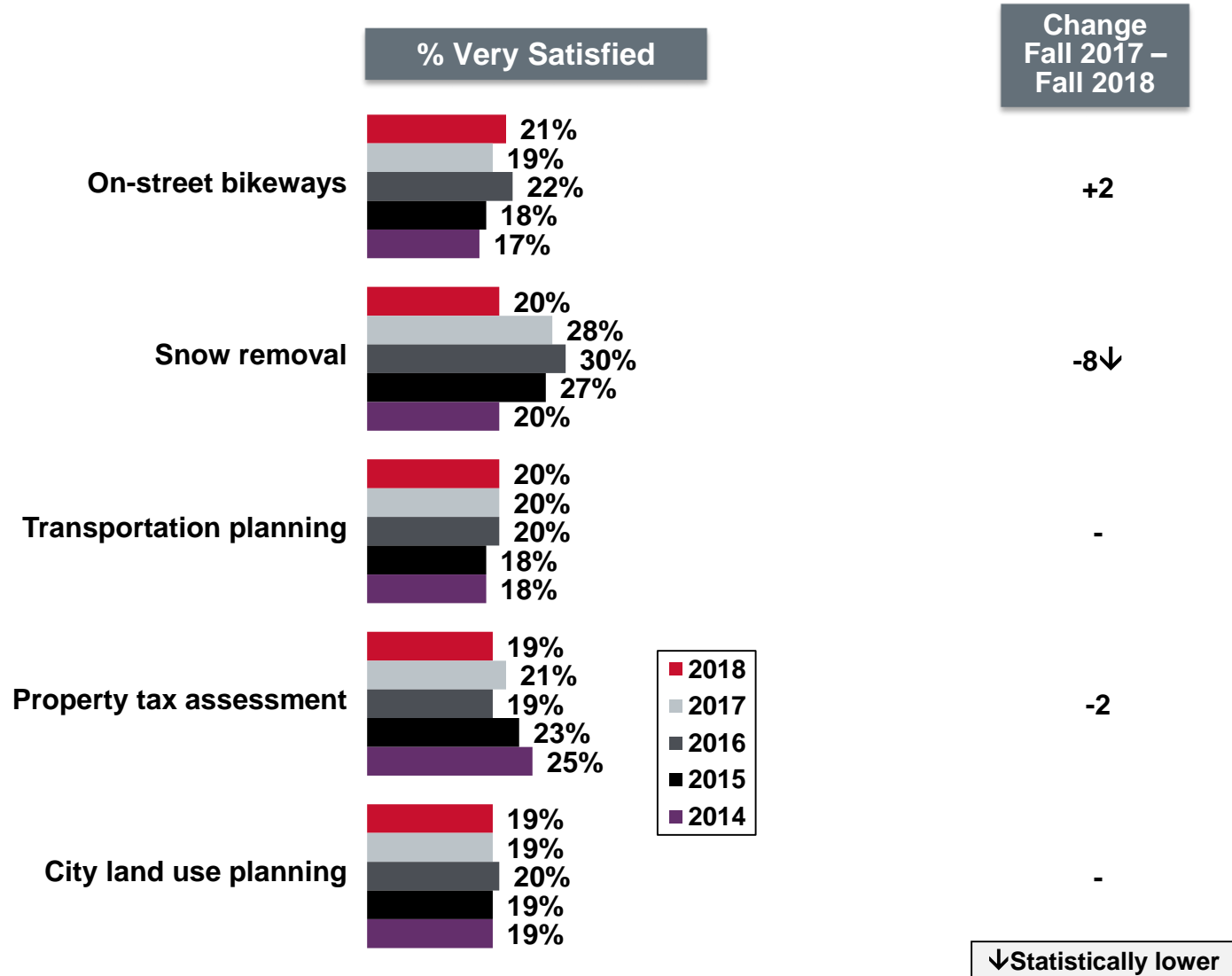
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



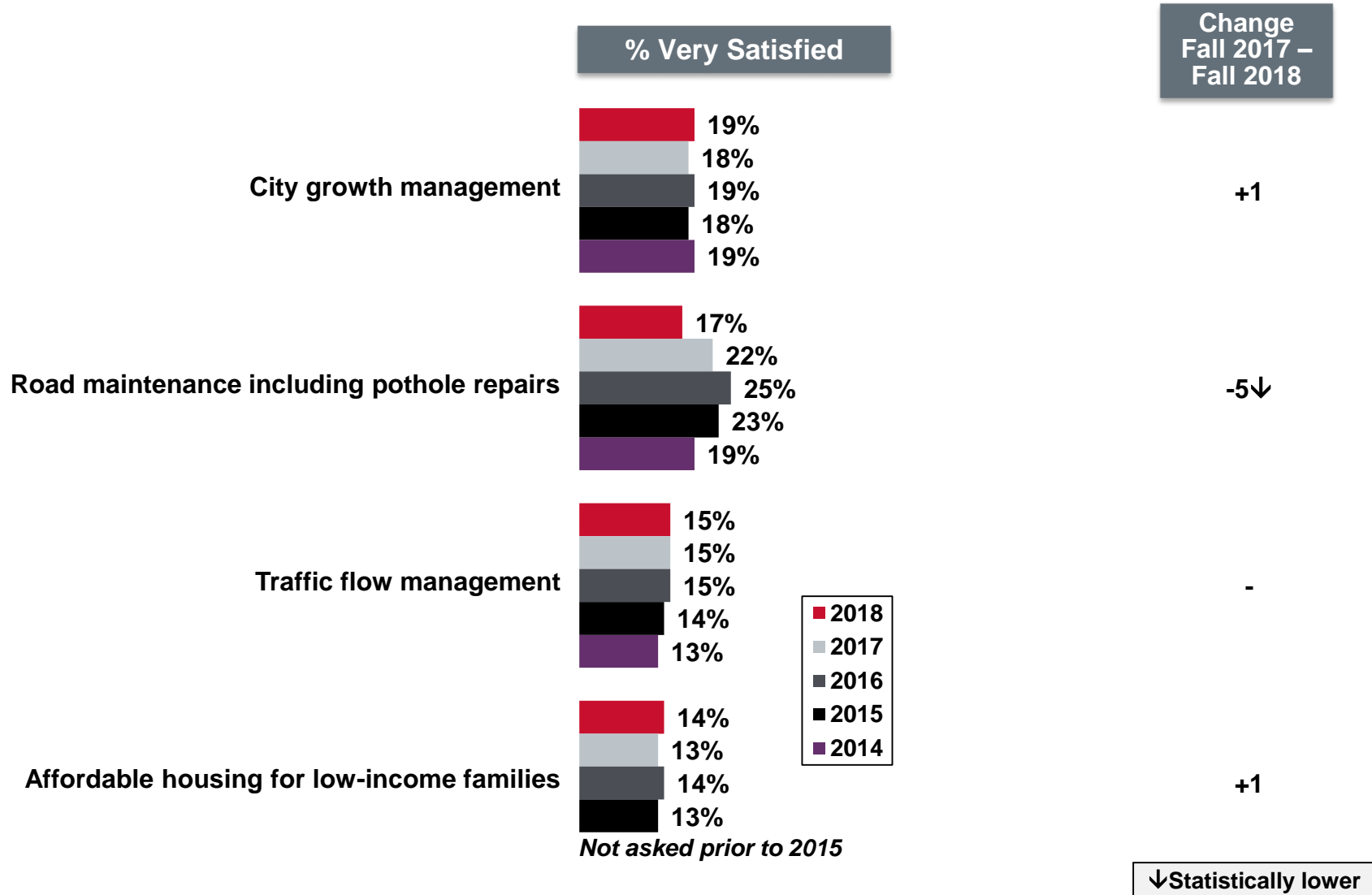
# Tracking Satisfaction with City Programs and Services (continued)



I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



# Tracking Satisfaction with City Programs and Services (continued)



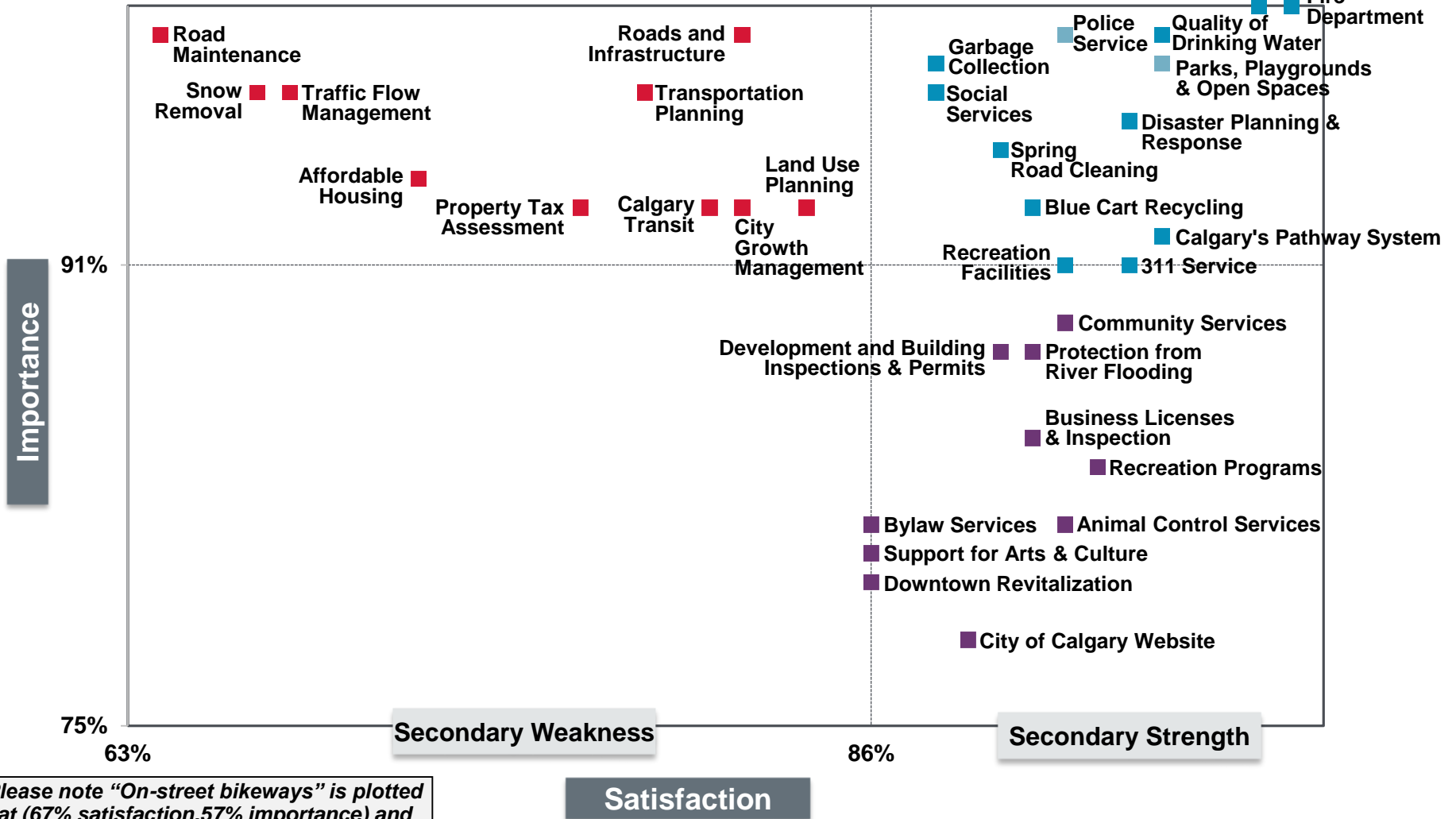
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me how satisfied you are with the job The City is doing in providing that program or service. Base: Valid respondents (Bases vary)



# Importance vs. Satisfaction Grid

Primary Weakness

Primary Strength

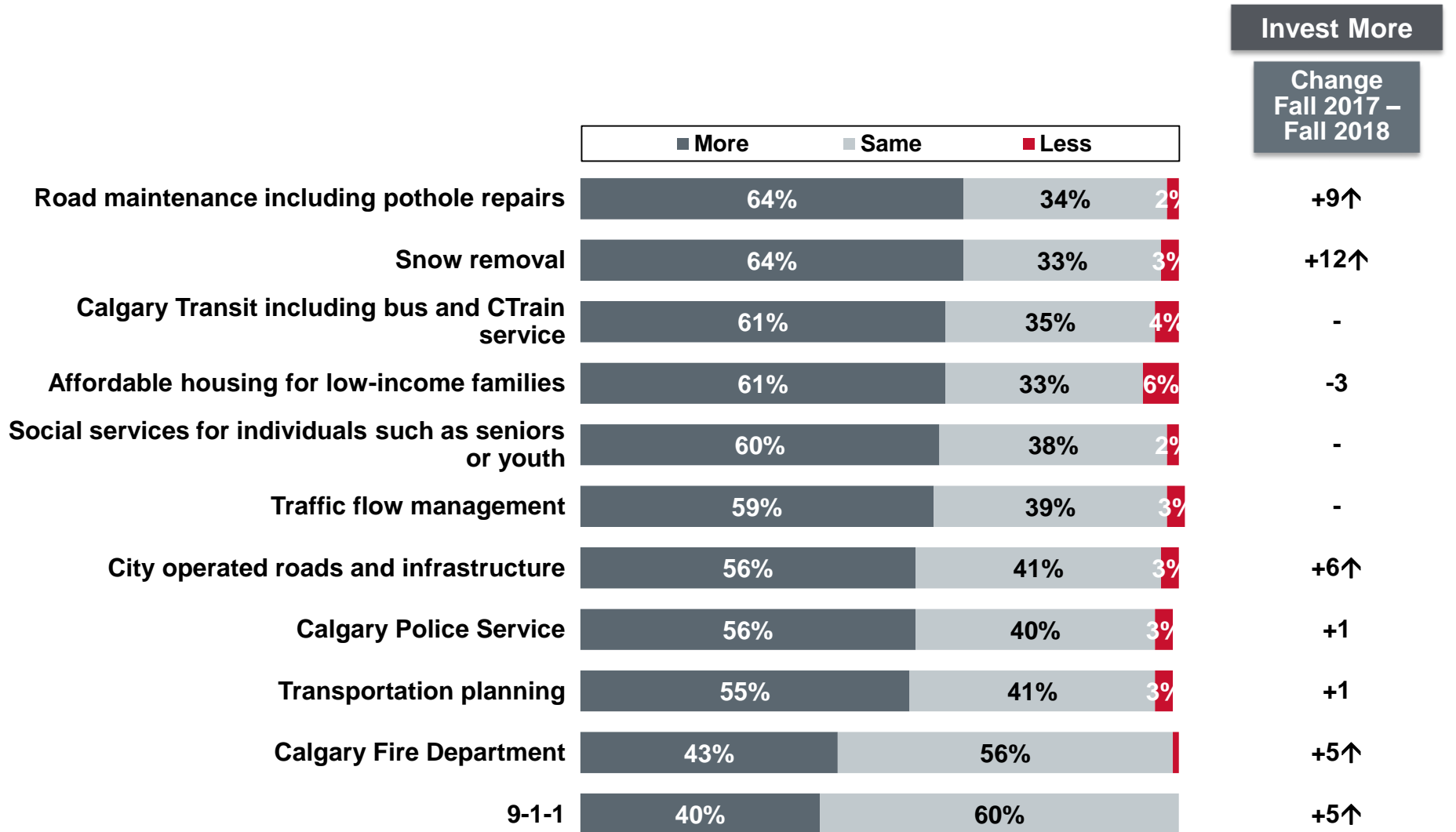


Please note "On-street bikeways" is plotted at (67% satisfaction, 57% importance) and not illustrated on this graph.





# Investment in City Programs and Services



↑ Statistically higher

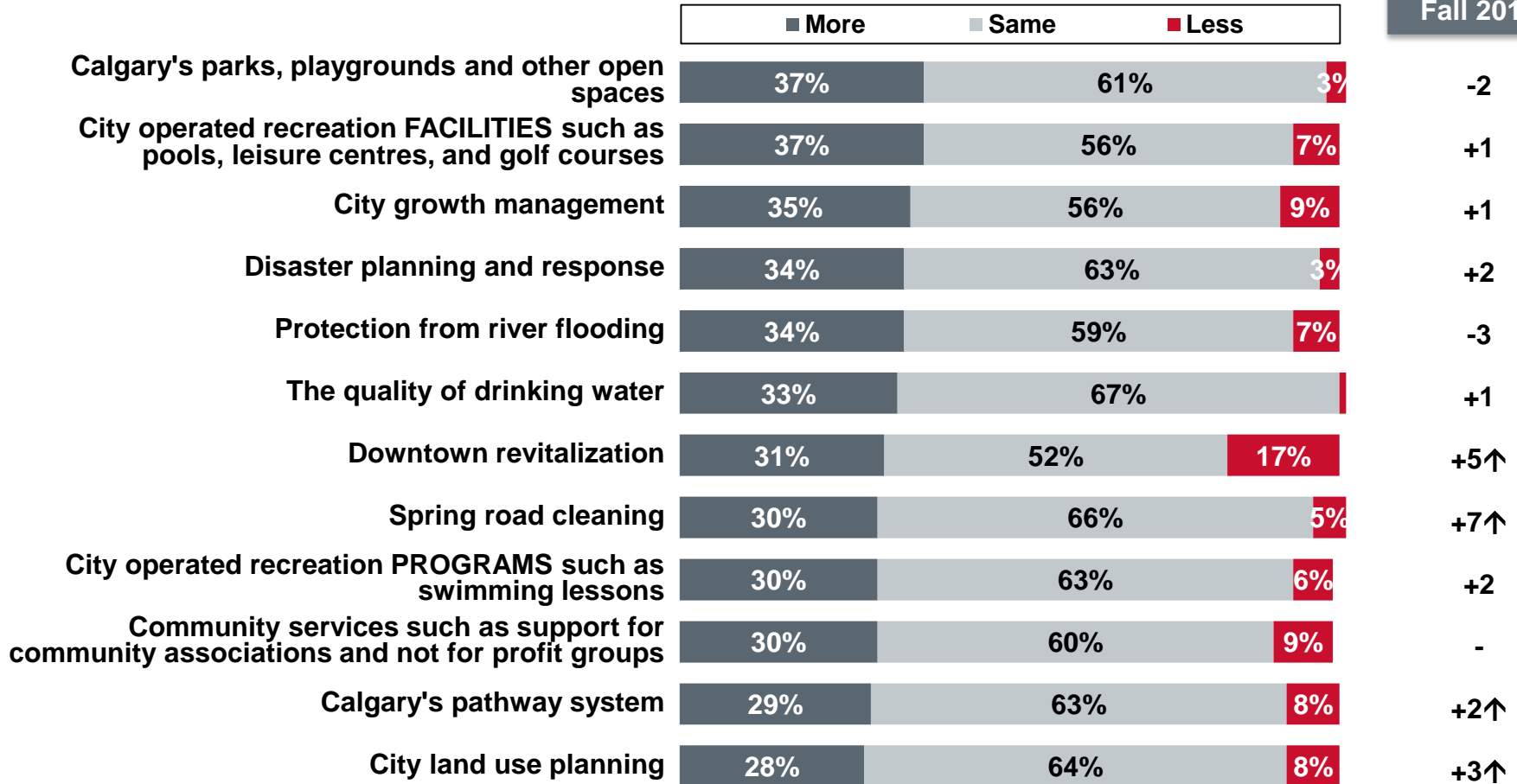
I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service. Base: Valid respondents (Bases vary)



# Investment in City Programs and Services (continued)

Invest More

Change  
Fall 2017 –  
Fall 2018

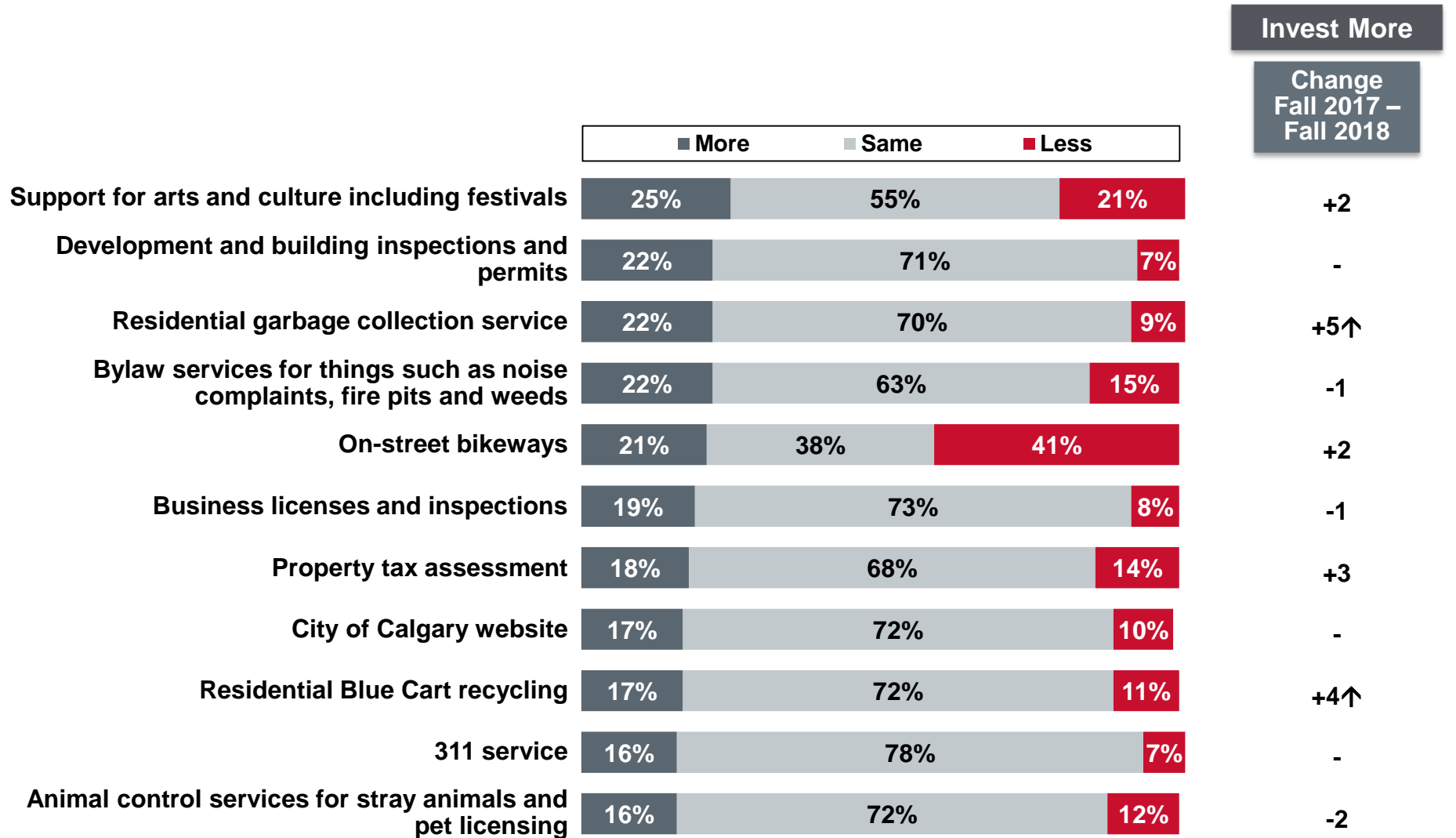


↑ Statistically higher

I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.  
Base: Valid respondents (Bases vary)



# Investment in City Programs and Services (continued)



↑ Statistically higher

I am going to read a list of programs and services provided to you by The City of Calgary. Please tell me if you think The City should invest more, less or the same amount on the program or service.  
Base: Valid respondents (Bases vary)

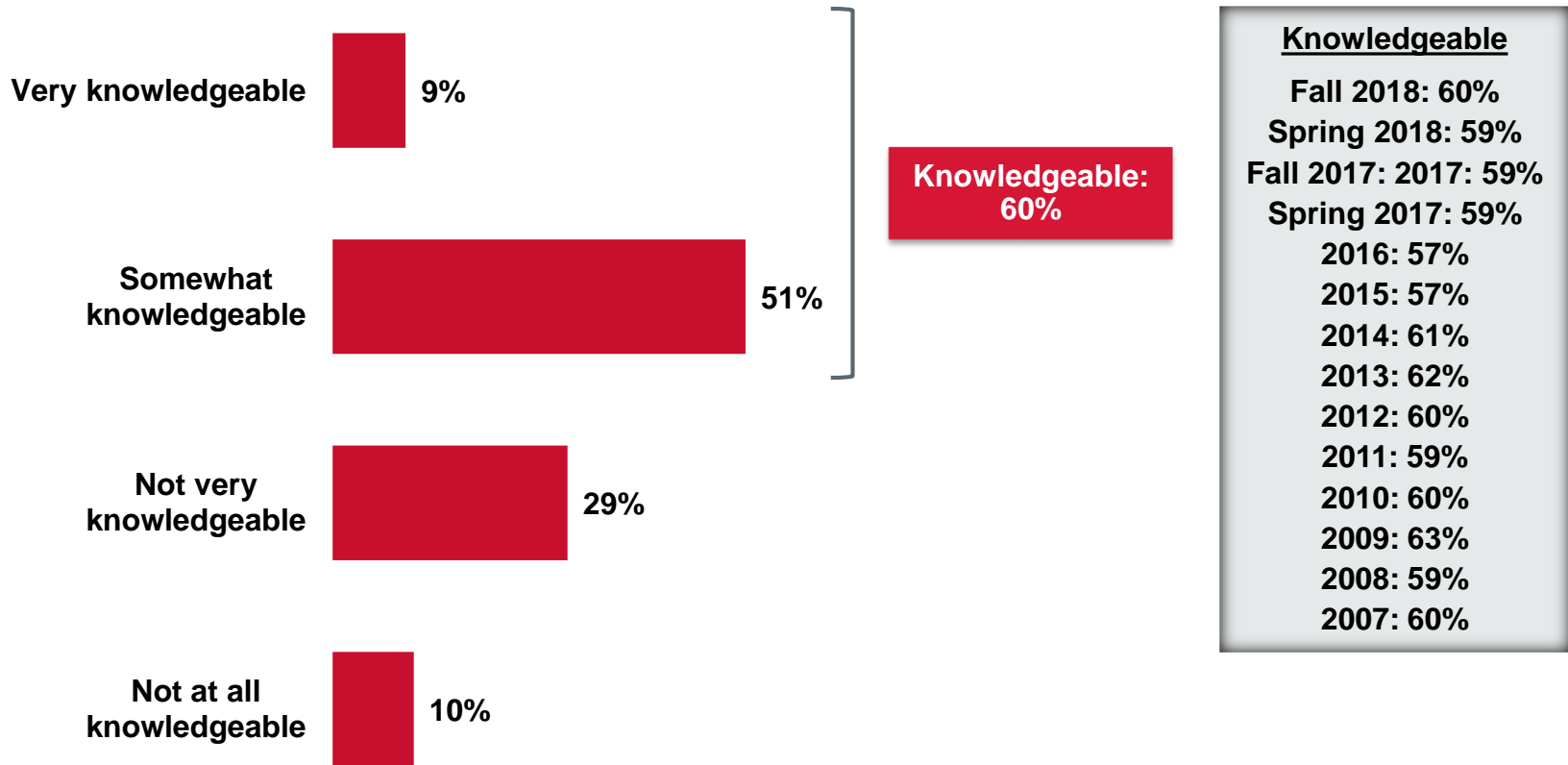


# Taxation





# Knowledge Levels of Tax Dollar Spending

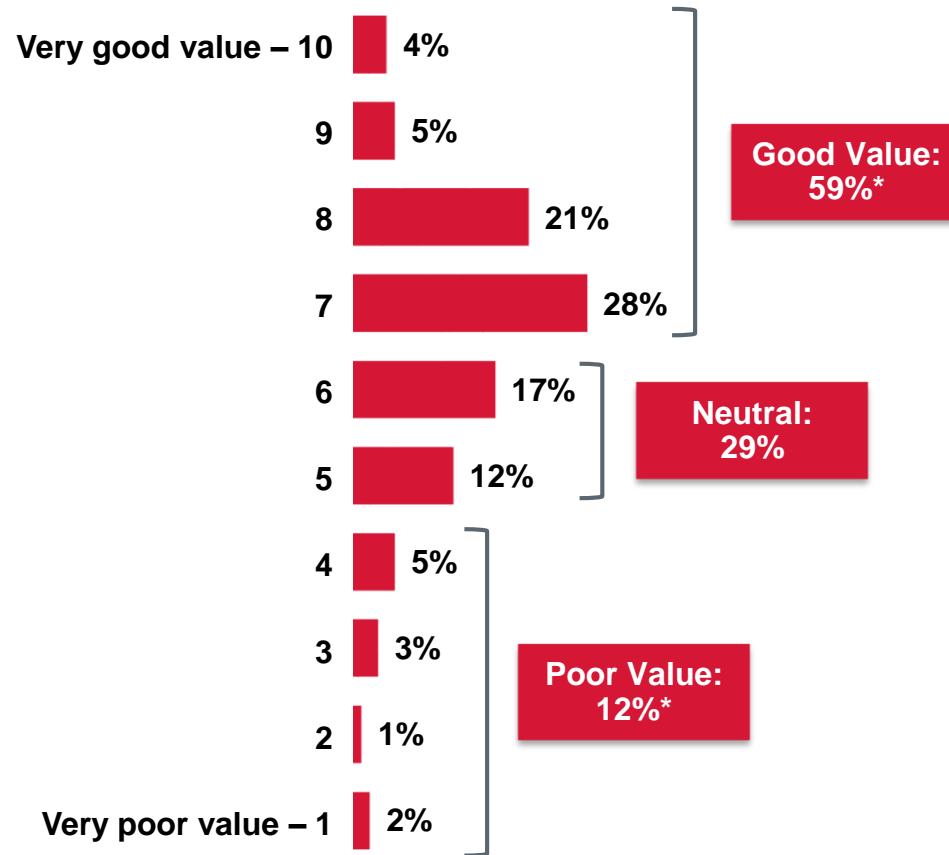


*Thinking about how The City of Calgary government is run, and what services it provides, would you say you are very, somewhat, not very, or not at all knowledgeable about how City tax dollars are spent?*

Base: Valid respondents (n=2,492)



# Perceived Value of Property Taxes



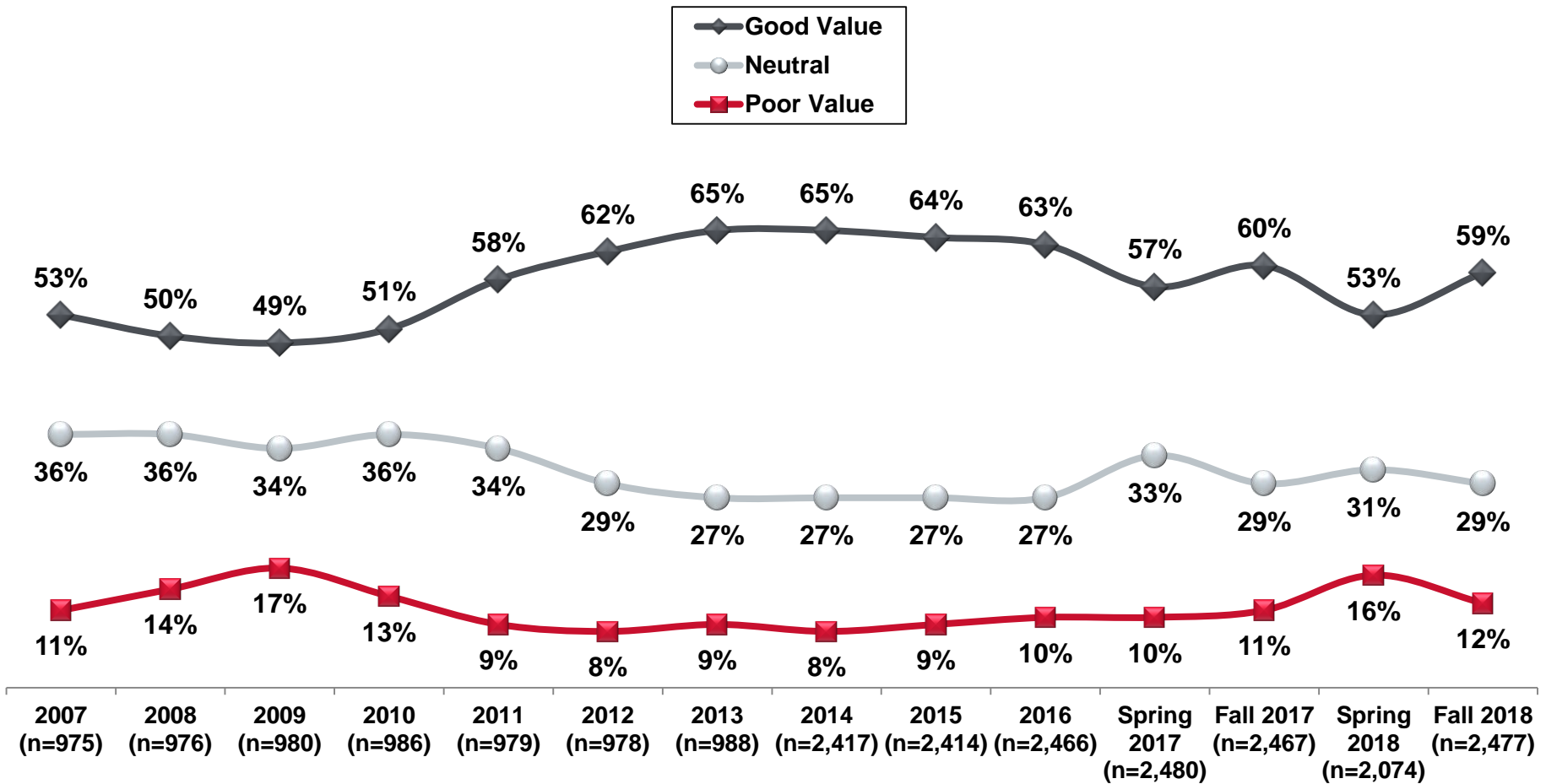
\*Rounding

Your property tax dollars are divided between The City and the Province. In Calgary, approximately half of your property tax bill 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 (n=2,477)



# Tracking Perceived Value of Property Taxes

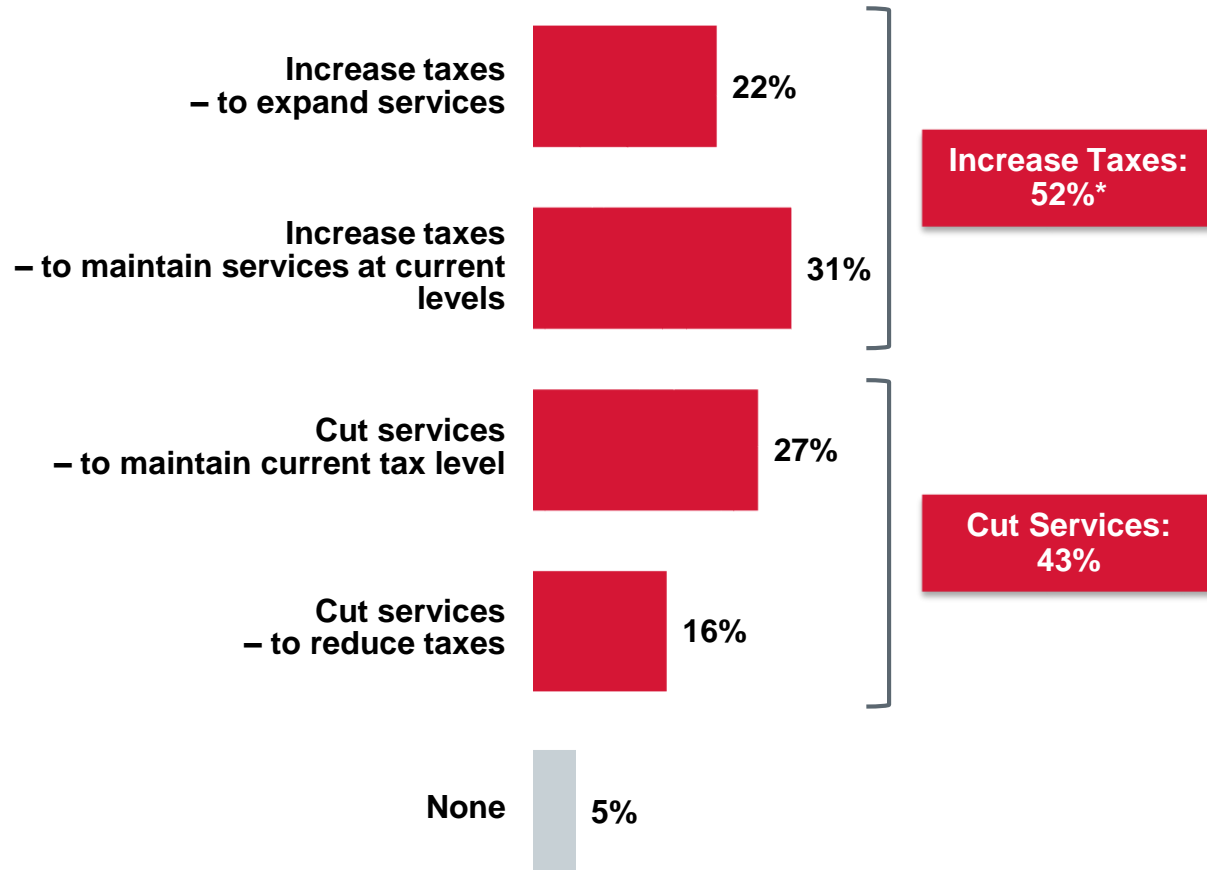


Your property tax dollars are divided between The City and the Province. In Calgary, approximately half of your property tax bill goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars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

Base: Valid respondents



# Balancing Taxation and Service Delivery Levels



\*Rounding

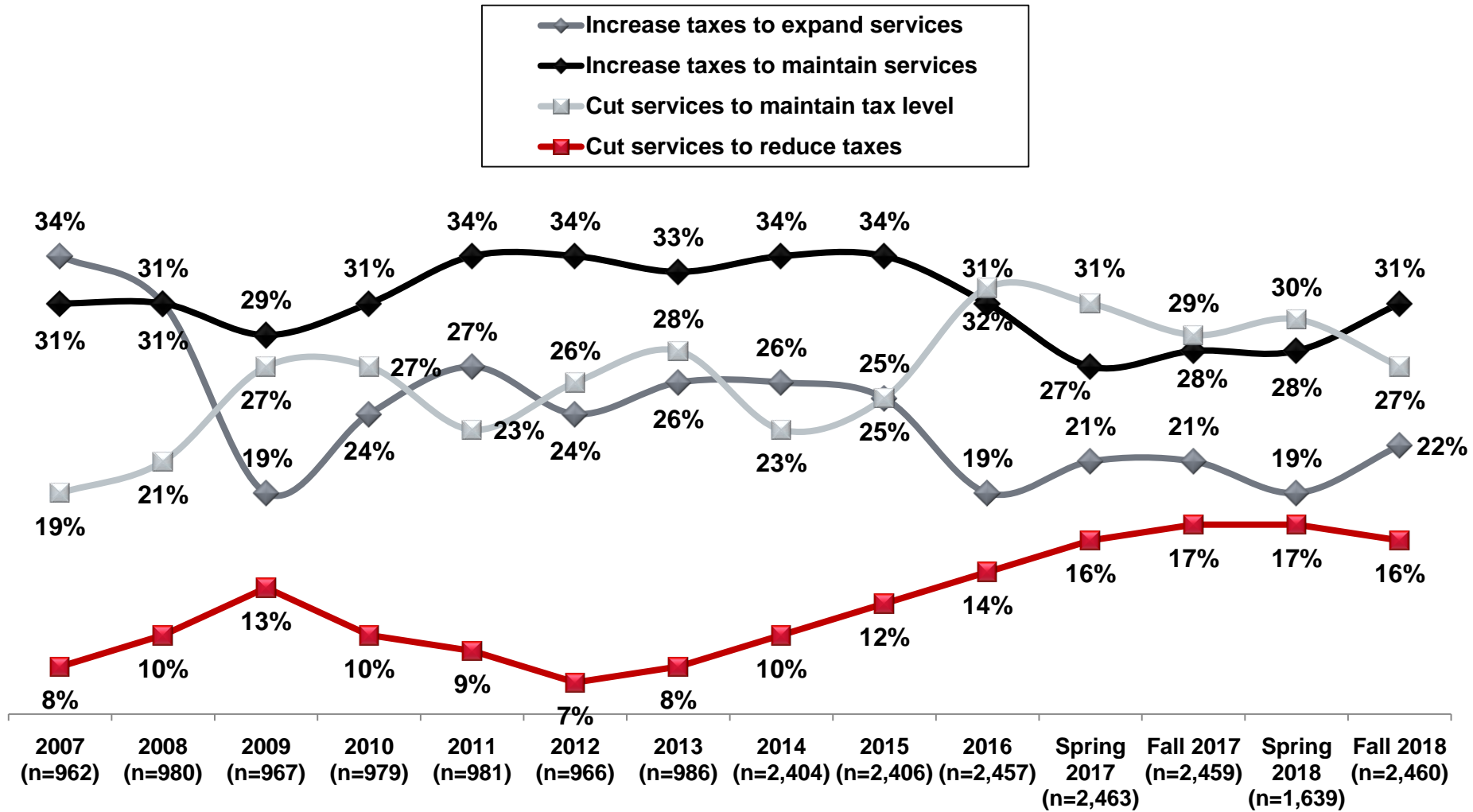
*Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents (n=2,460)





# Tracking Balancing Taxation and Service Delivery Levels

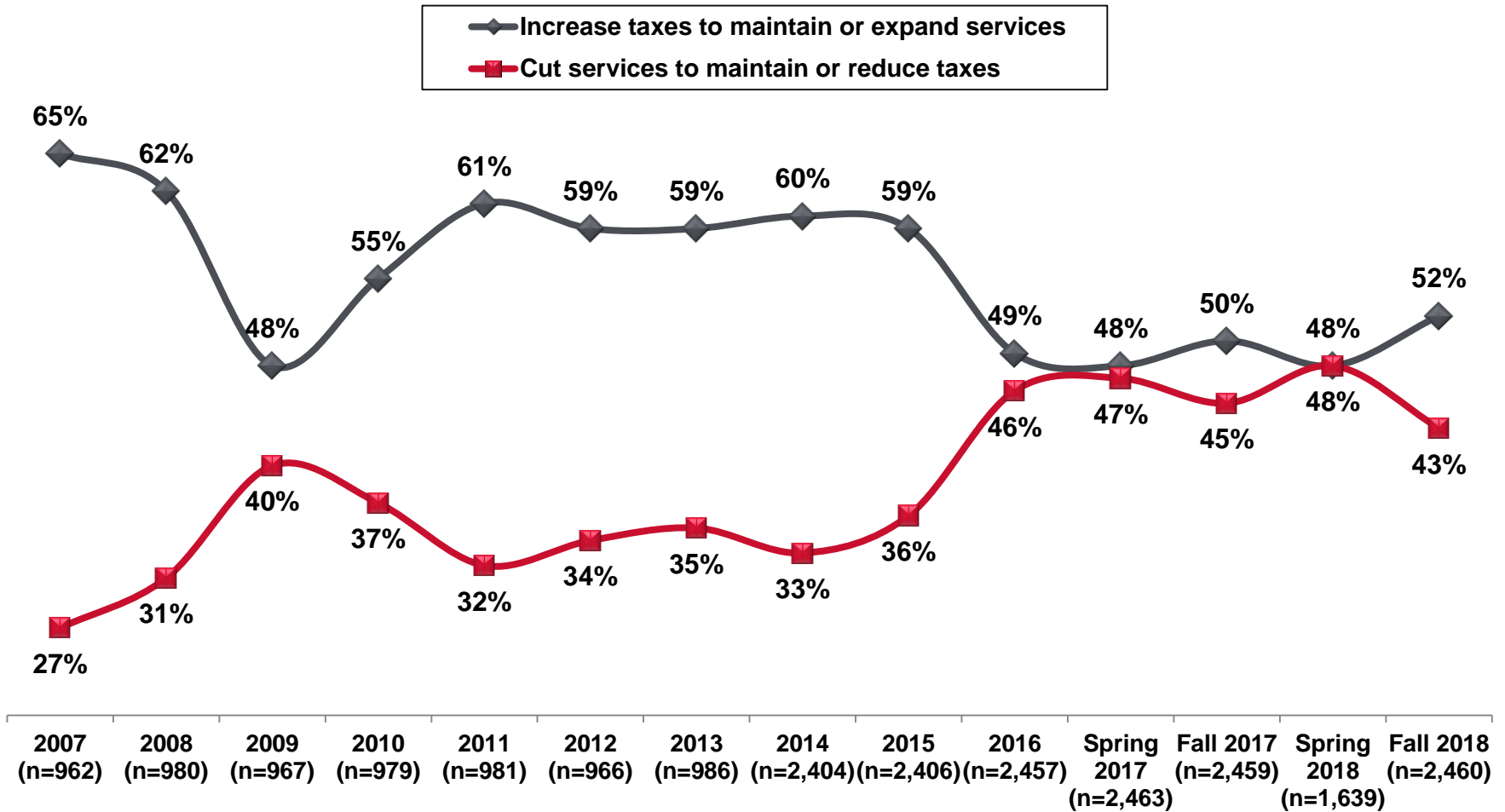


*Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents



# Tracking Balancing Taxation and Service Delivery Levels: Increase Taxes versus Cut Services

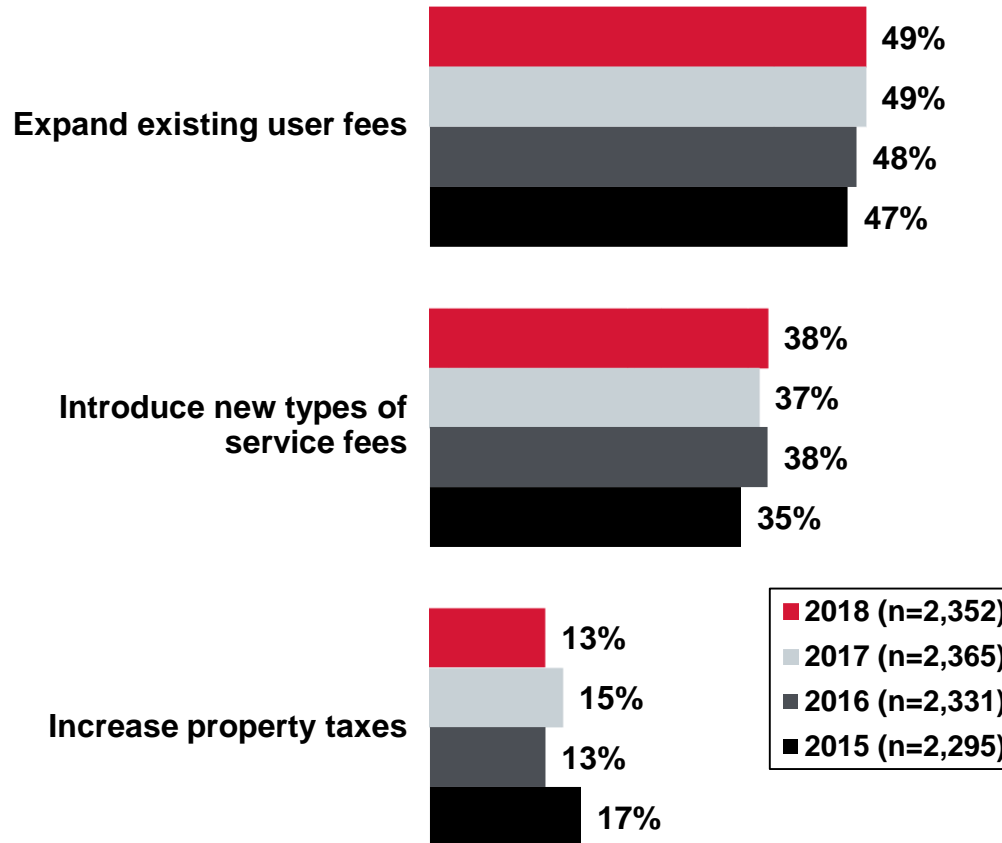


*Municipal property taxes are the primary way to pay for services and programs provided by The City of Calgary. Due to the increased cost of maintaining current service levels and infrastructure, The City must balance taxation and service delivery levels. To deal with this situation, which of the following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

Base: Valid respondents



# Options for Increasing City Revenue



All waves conducted in the Fall

**Should The City need to increase the amount of revenue it collects from citizens for new or emerging services, would you prefer The City to ...?**

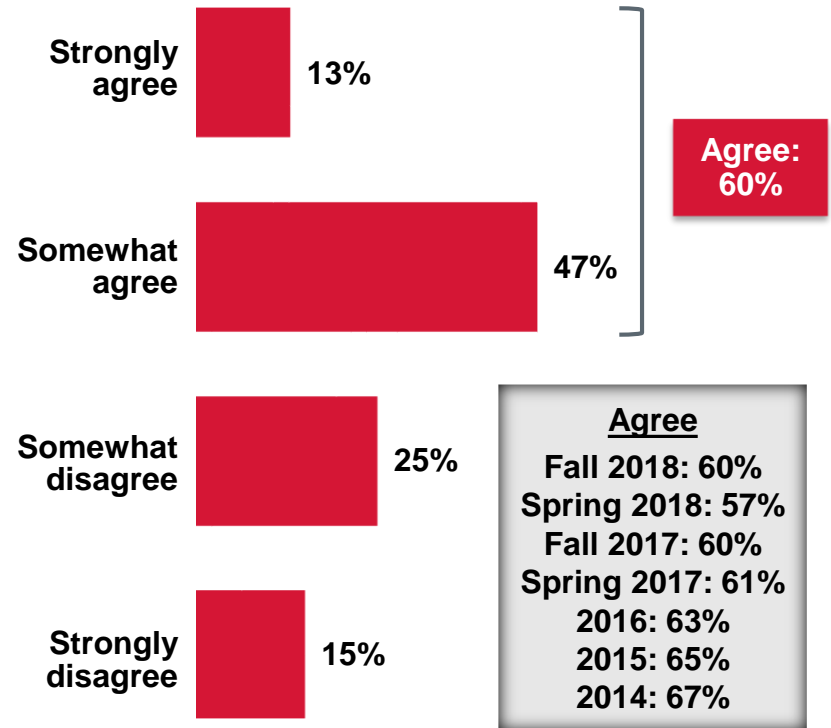
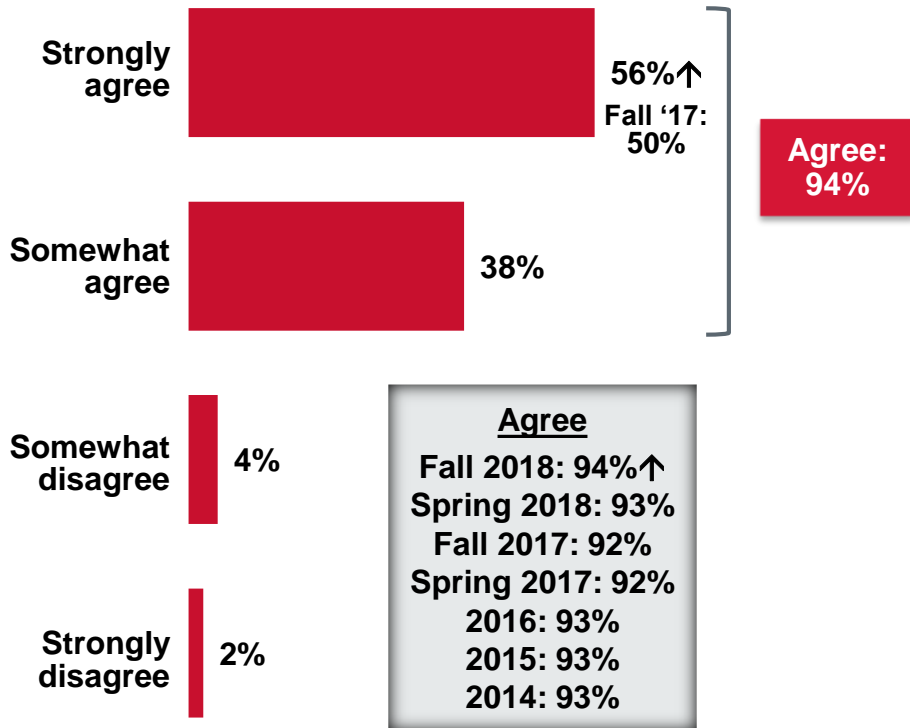
Base: Valid respondents



# Property Tax Dollar Investment

*I am interested in knowing how my property tax dollars are invested in various City services*

*The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services*



↑Statistically higher than Fall 2017

Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

Base: Valid respondents (n=2,487 / n=2,463)



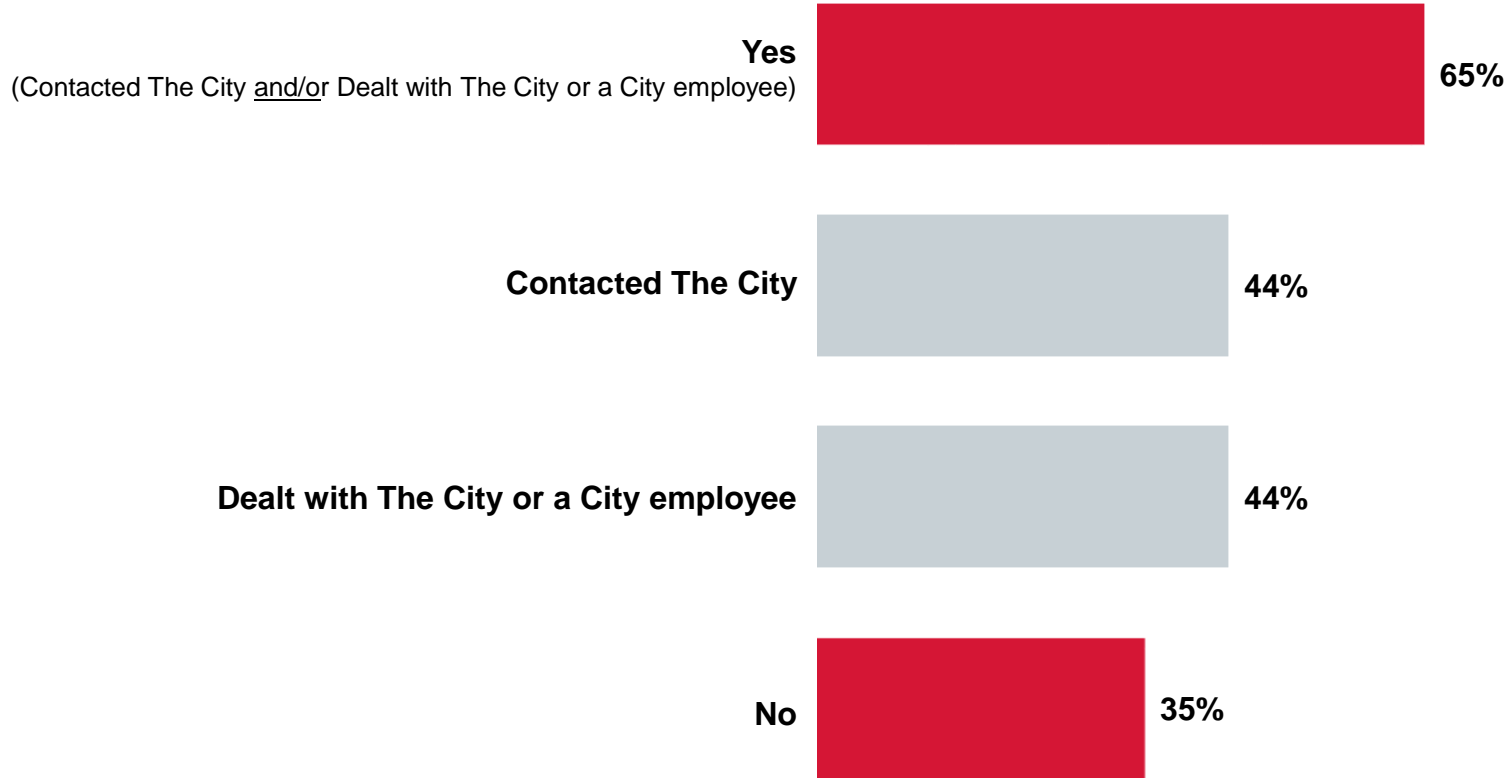
## Contact with The City and Customer Service





# Past 12 Months Contact with The City of Calgary

Multiple Responses

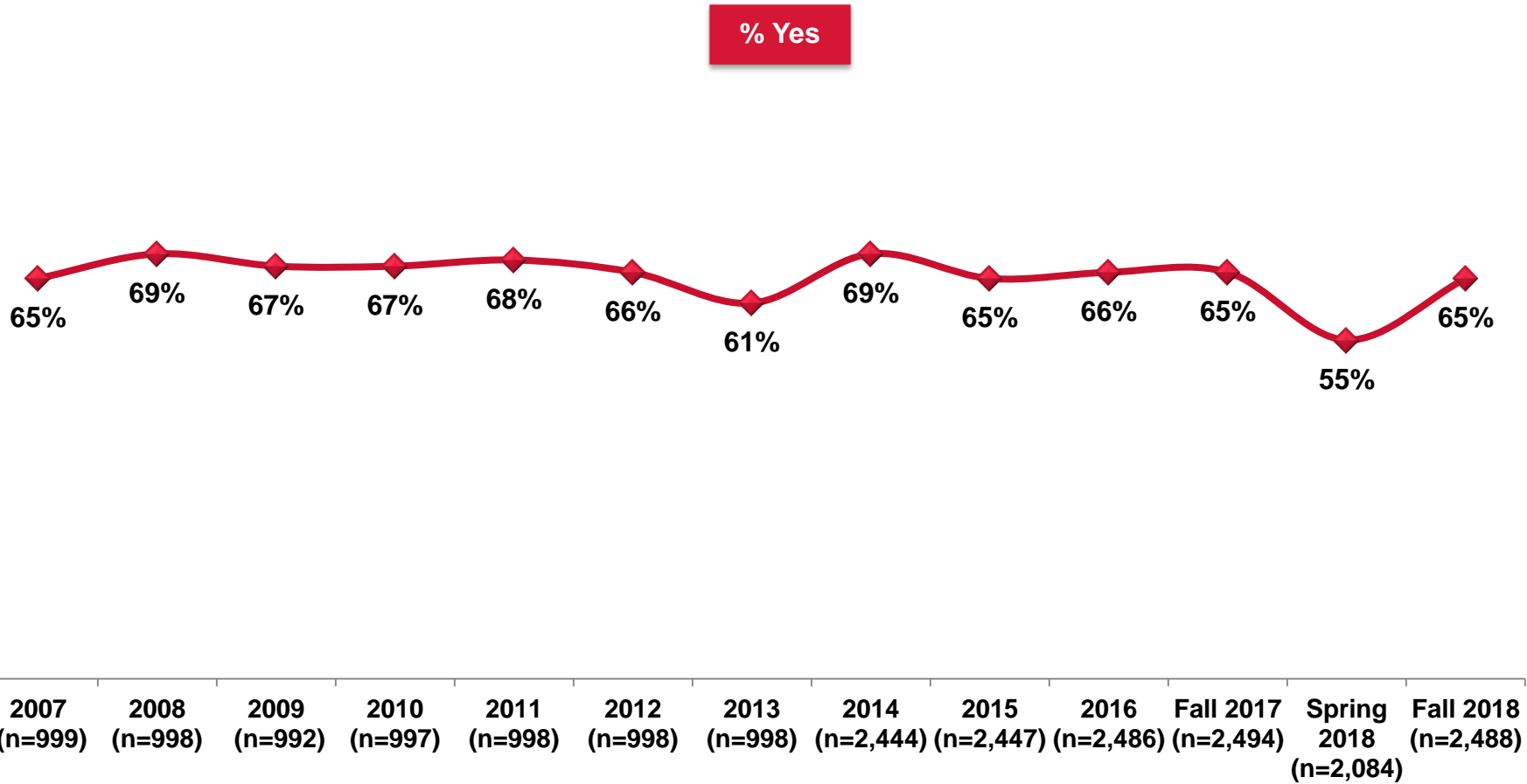


*Have you contacted The City of Calgary or dealt with The City or one of its employees in the last twelve months?*

Base: Valid respondents (n=2,488)



# Tracking Past 12 Months Contact with The City of Calgary

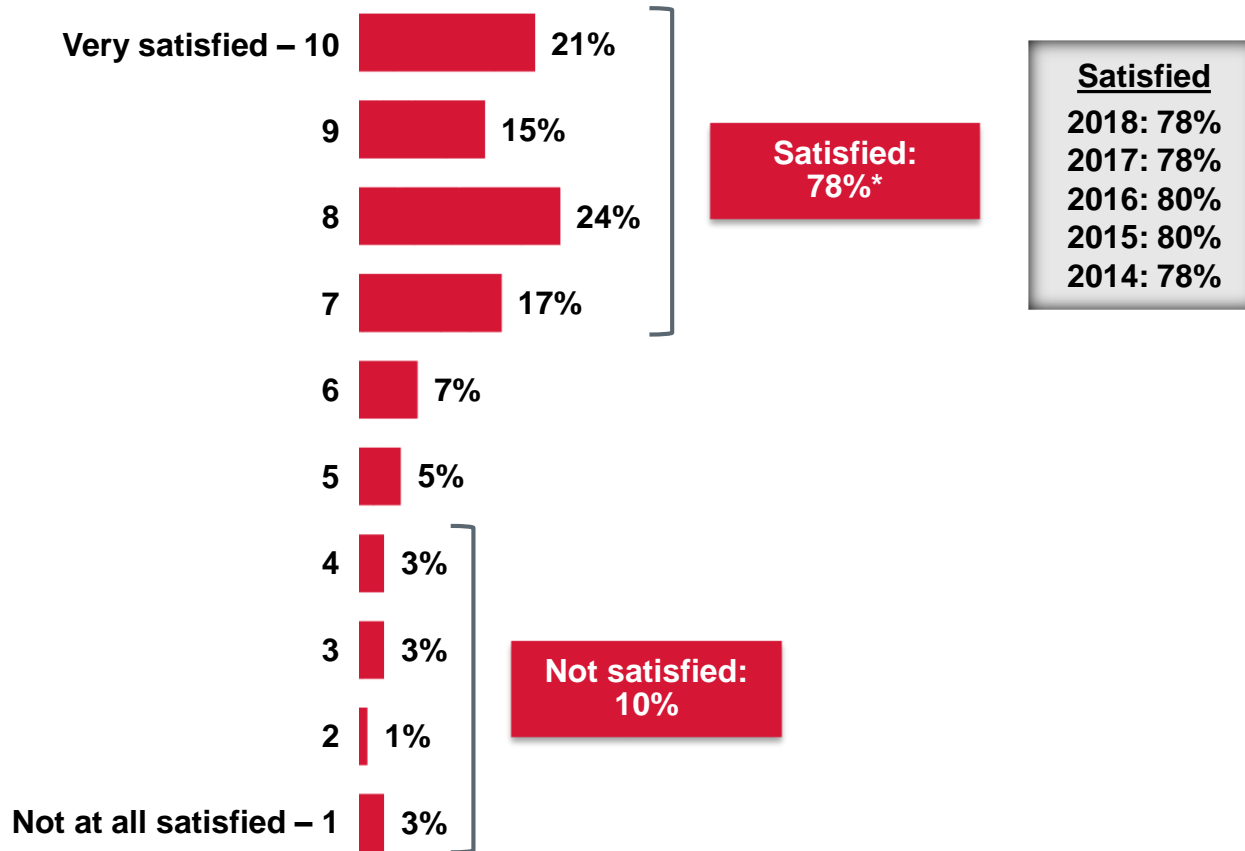


*Have you contacted The City of Calgary or one of its employees in the last twelve months?*

Base: Valid respondents



# Satisfaction with the Overall Level and Quality of Customer Service



All waves conducted in the Fall

On a scale of 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 customer service provided by The City of Calgary?

\*Rounding

Base: Valid respondents who contacted or dealt with The City in the last twelve months (n=1,651)

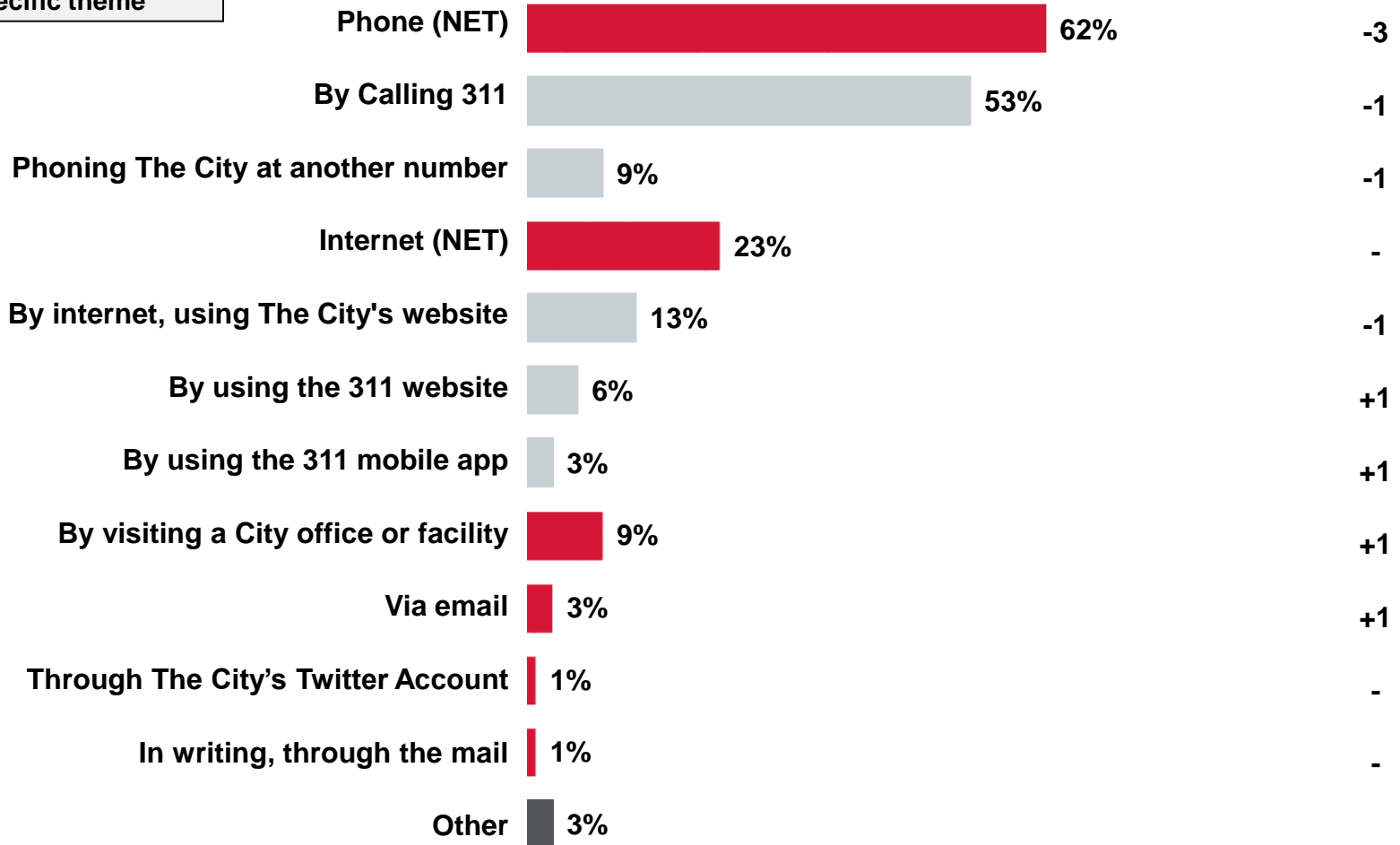




# Type of Contact

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

Change  
Fall 2017 to  
Fall 2018

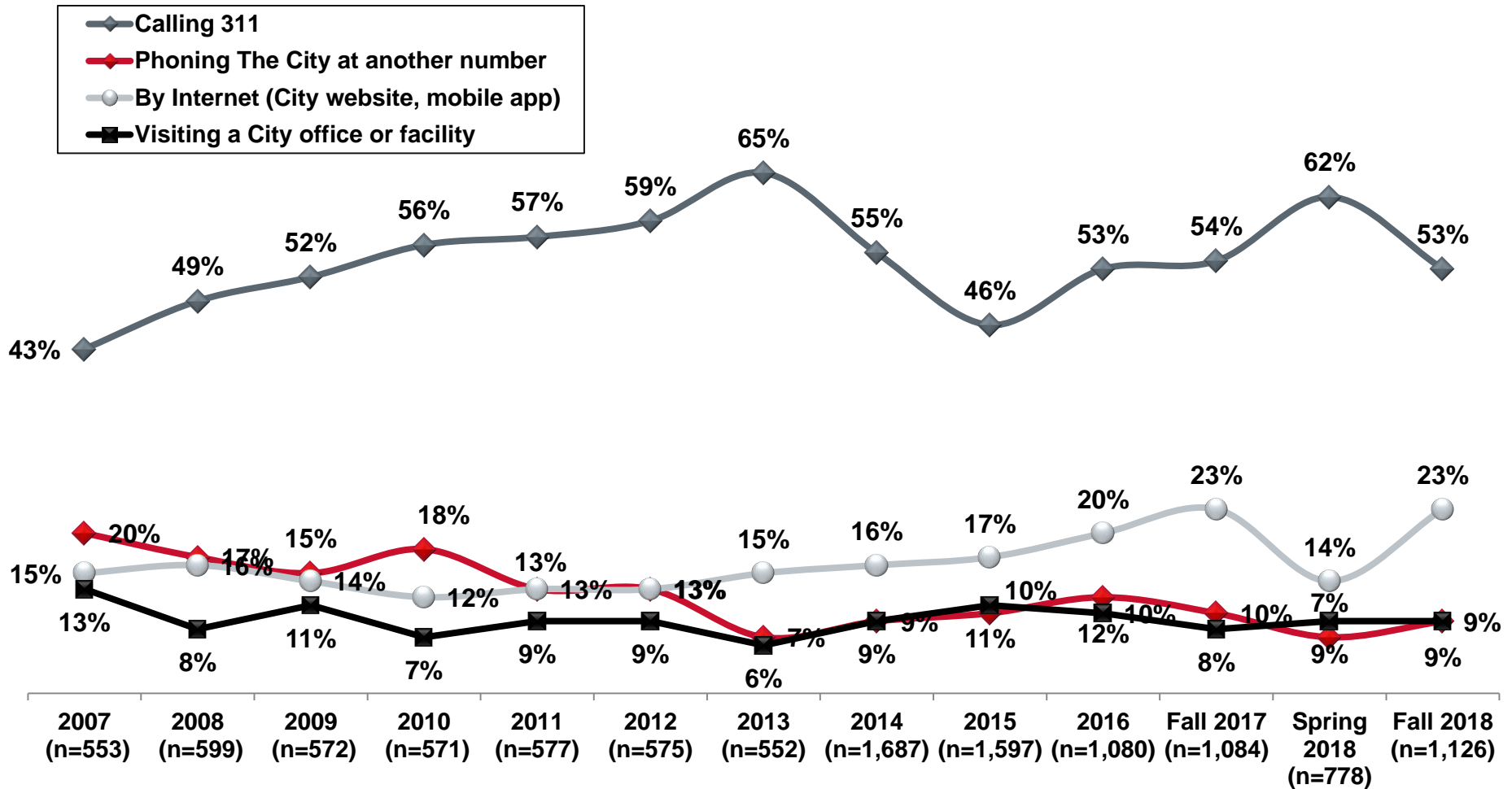


When you contacted The City was it... ?

Base: Valid respondents who contacted The City in the last twelve months (n=1,126)



# Tracking Type of Contact

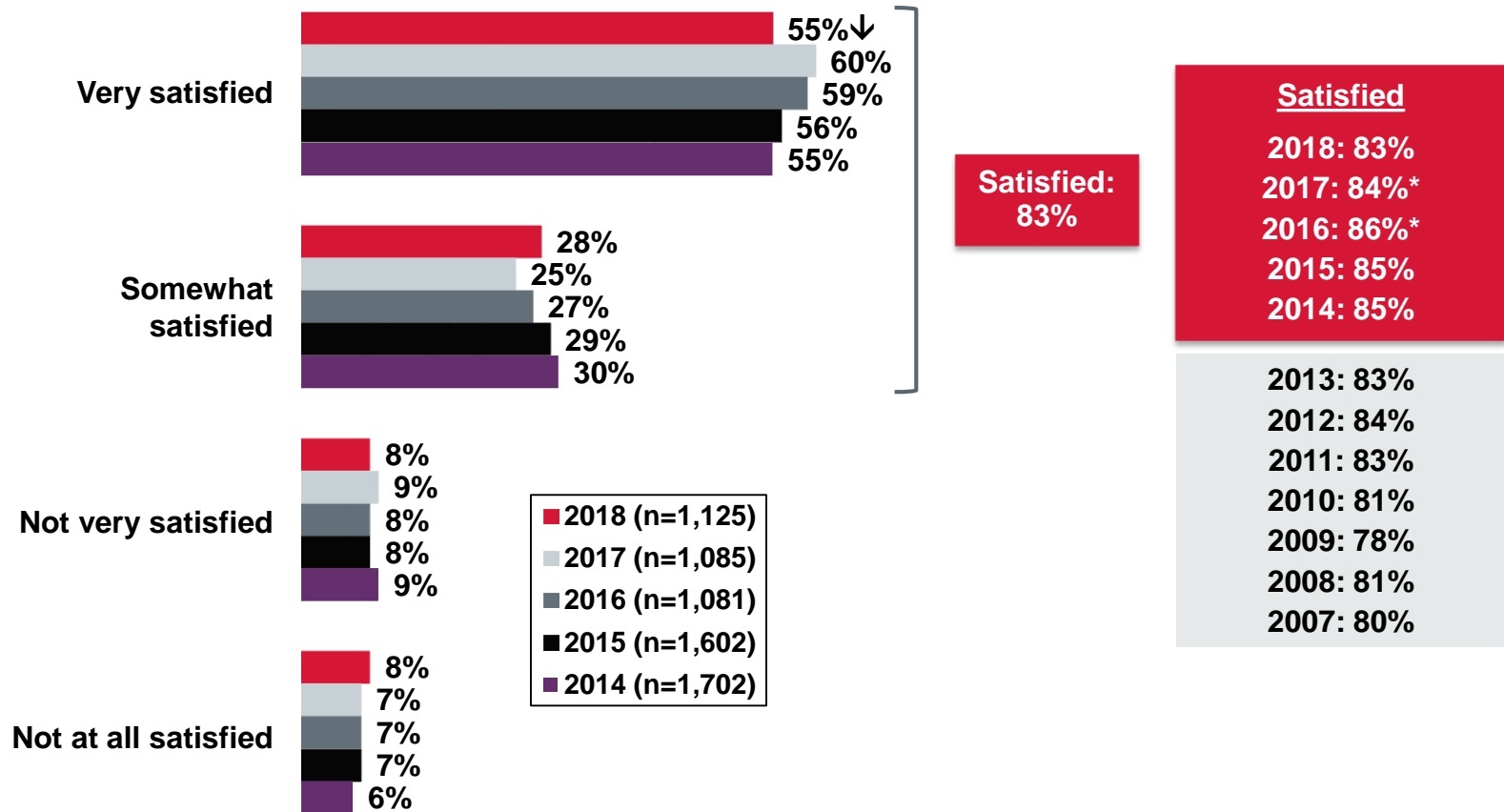


When you contacted The City was it... ?

Base: 2016 to 2018: Valid respondents who contacted The City of Calgary in the last twelve months  
 2006 to 2015: Valid respondents who contacted or dealt with The City of Calgary in the last twelve months



# Satisfaction with Most Recent City Contact



All waves conducted in the Fall

↓ Statistically lower than 2017

\*Rounding

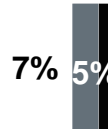
How satisfied were you with your most recent contact with The City?  
 Base: 2017 and 2016: Valid respondents who contacted The City of Calgary in the last twelve months /  
 2006 to 2015: Valid respondents who contacted or dealt with The City of Calgary in the last twelve months



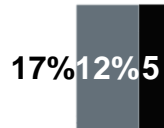
# Attitudes Regarding Customer Service

% Disagree

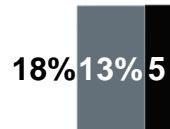
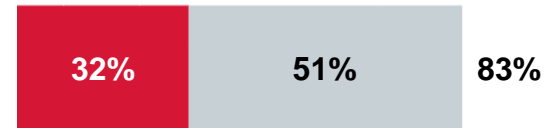
% Agree



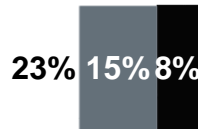
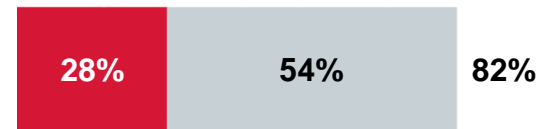
City staff are courteous, helpful, and knowledgeable



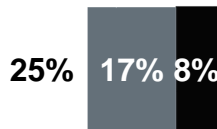
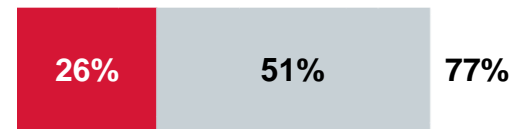
The quality of customer service from The City is consistently high



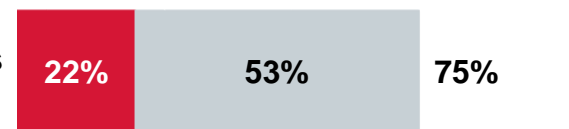
The City of Calgary makes customer service a priority



City staff are easy to get a hold of when I need them



The City responds quickly to requests and concerns



Somewhat disagree ■ Strongly disagree ■

■ Strongly agree ■ Somewhat agree

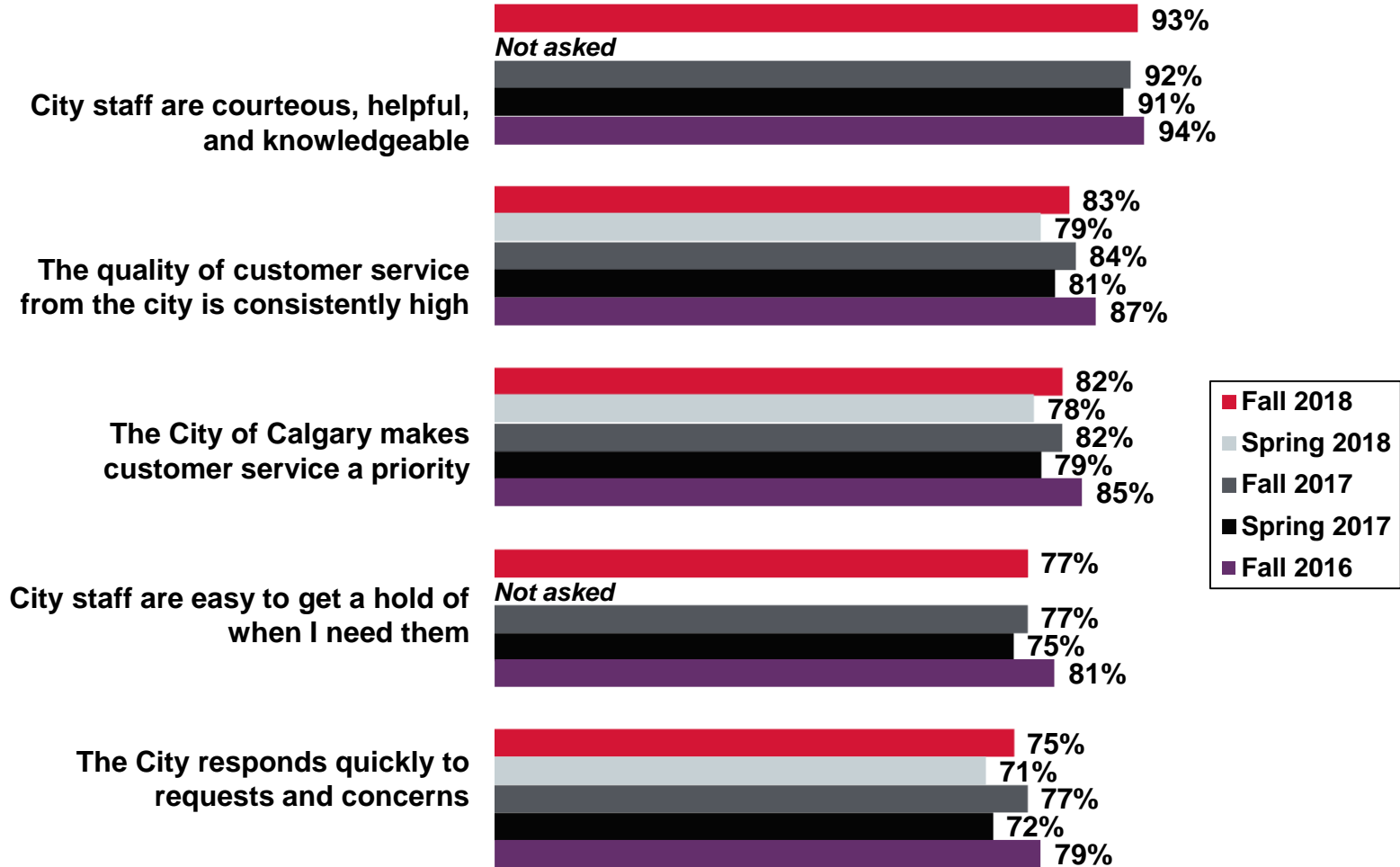
*Thinking about your personal dealings with The City of Calgary, your general impressions and anything you may have read, seen or heard, please tell me whether you agree or disagree with each of the following statements about The City?*

Base: Valid respondents (Bases vary)



# Tracking Attitudes Regarding Customer Service

% Agree



*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 (Bases vary)

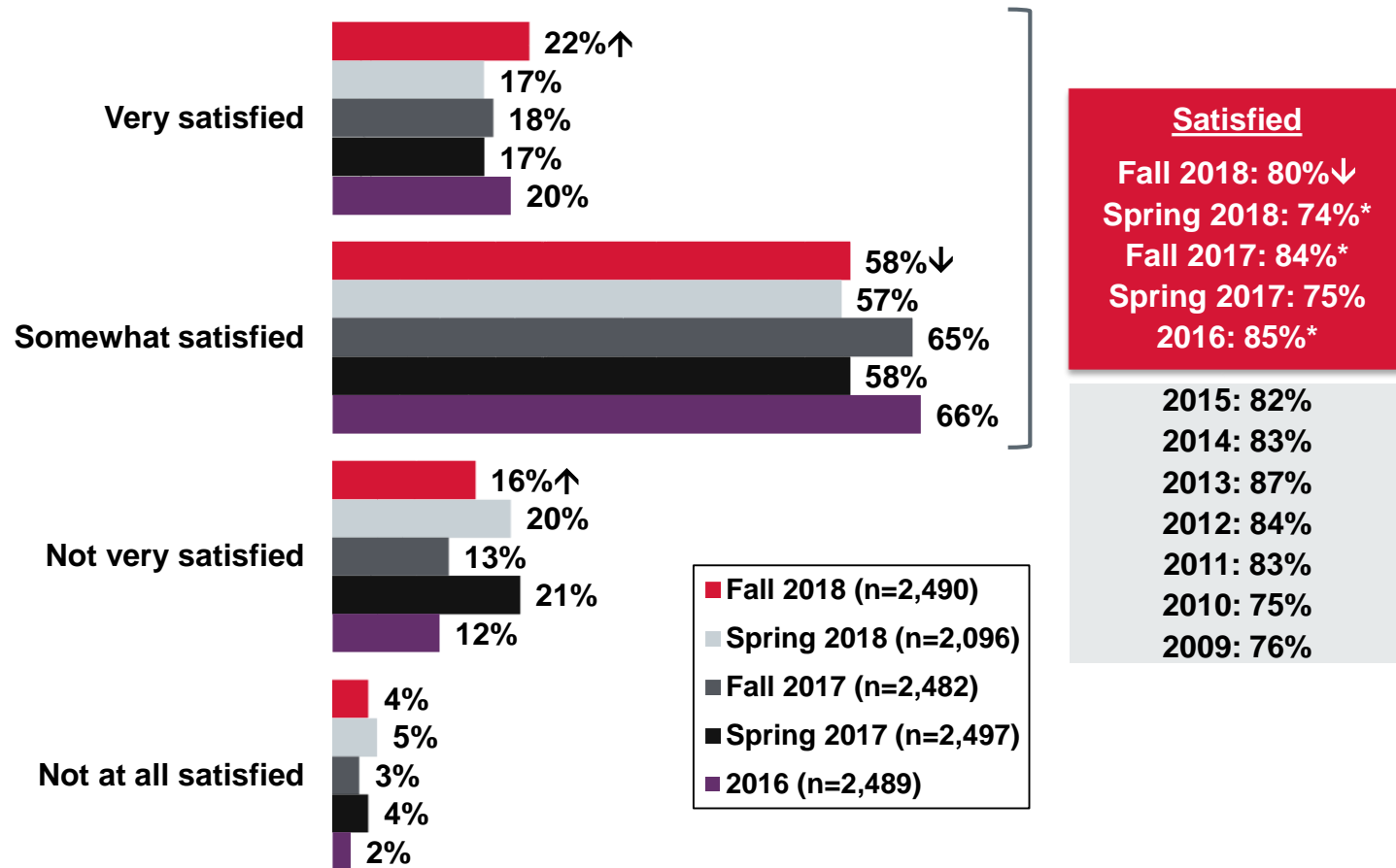


## City Communications





# Satisfaction with the Overall Quality of City Information and Communications



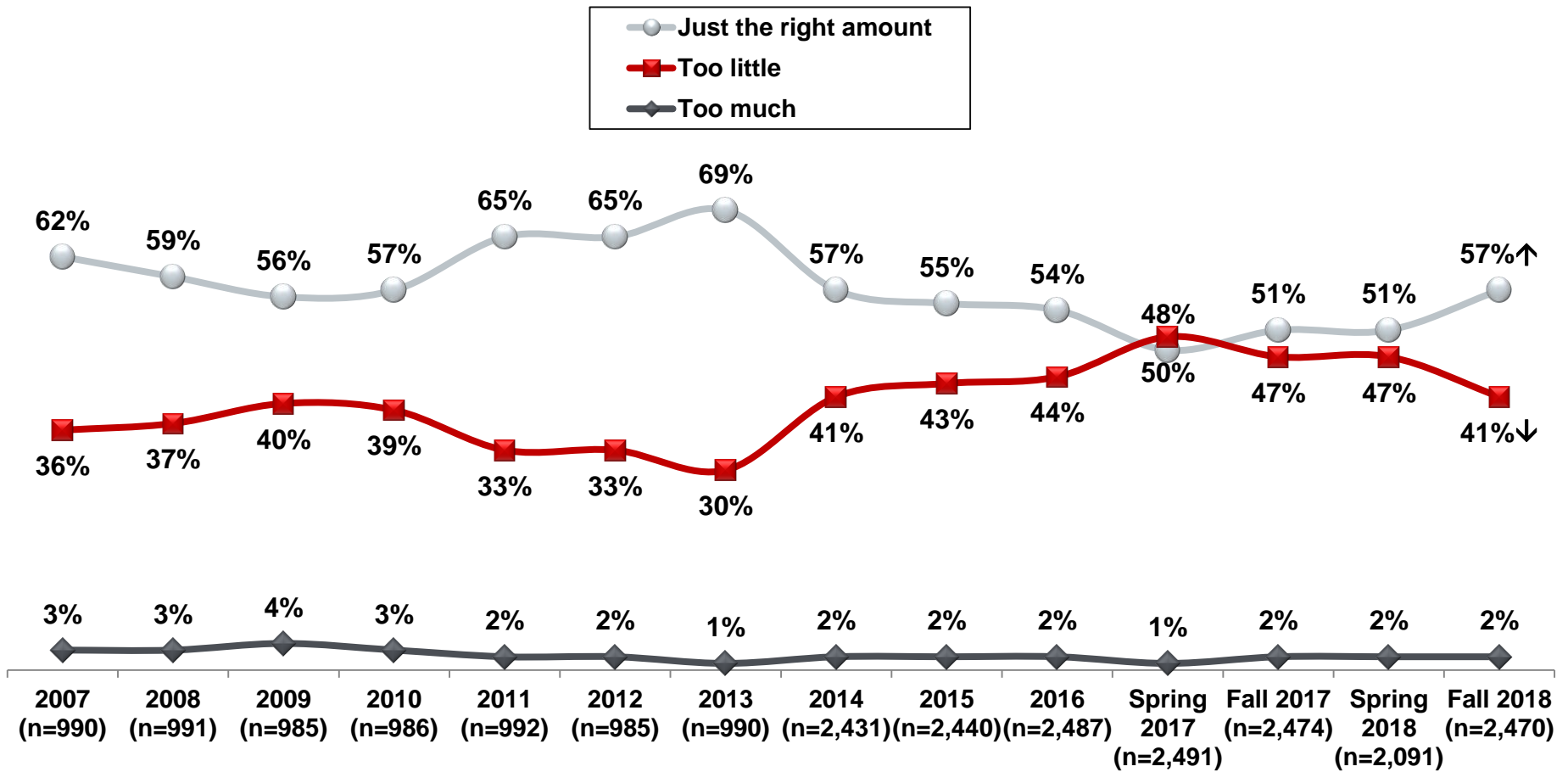
↑Statistically higher than Fall 2017  
 ↓Statistically lower than Fall 2017

\*Rounding

And how satisfied are you with the overall quality of City information and communications?  
 Base: Valid respondents



# The Amount of Information Accessible



In your opinion, do you currently have access to [prior to Spring 2018: receive] too much, too little, or just the right amount of information from The City?

Base: Valid respondents

↑ Statistically higher than Fall 2017  
 ↓ Statistically lower than Fall 2017





# City Reputation and Performance





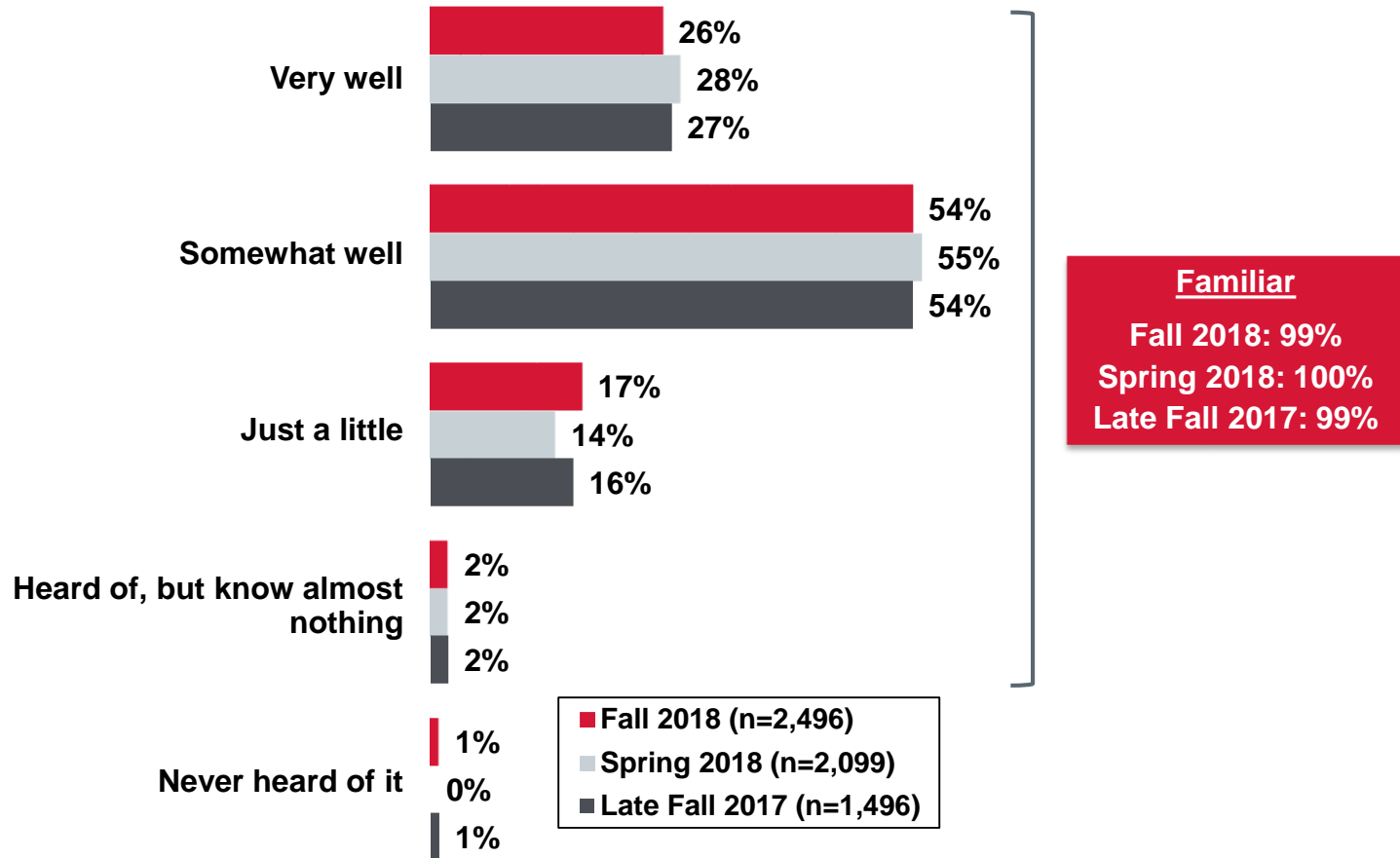
## A Model of Reputation



**Building a strong reputation helps an organization perform more effectively in the present AND builds a reservoir of goodwill to draw upon in future crises**



# Familiarity

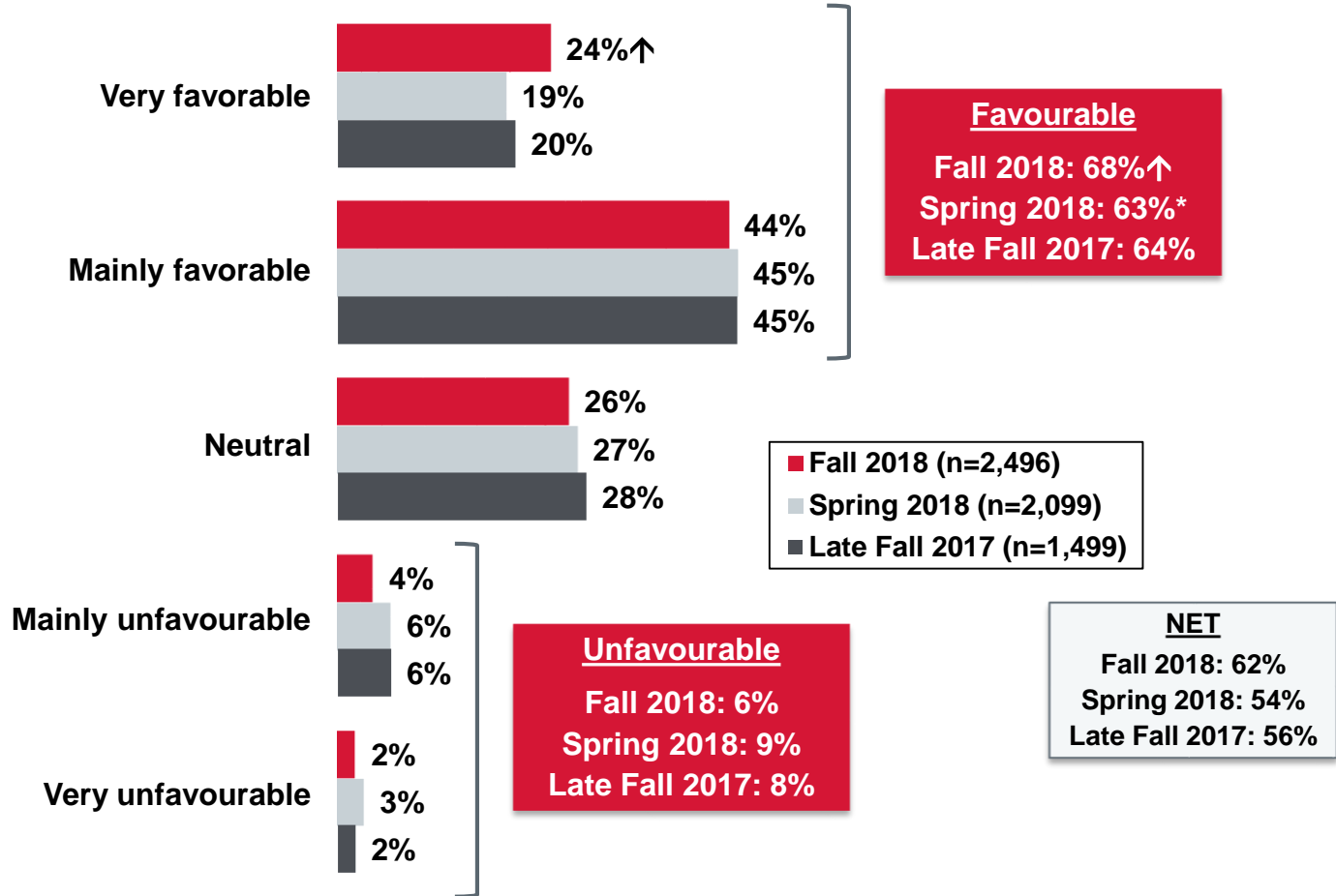


*Taking into account all the ways you have learned about or had contact with The City of Calgary, how well do you feel you know The City?*

Base: Valid respondents



# Favourability



↑Statistically higher than Late Fall 2017

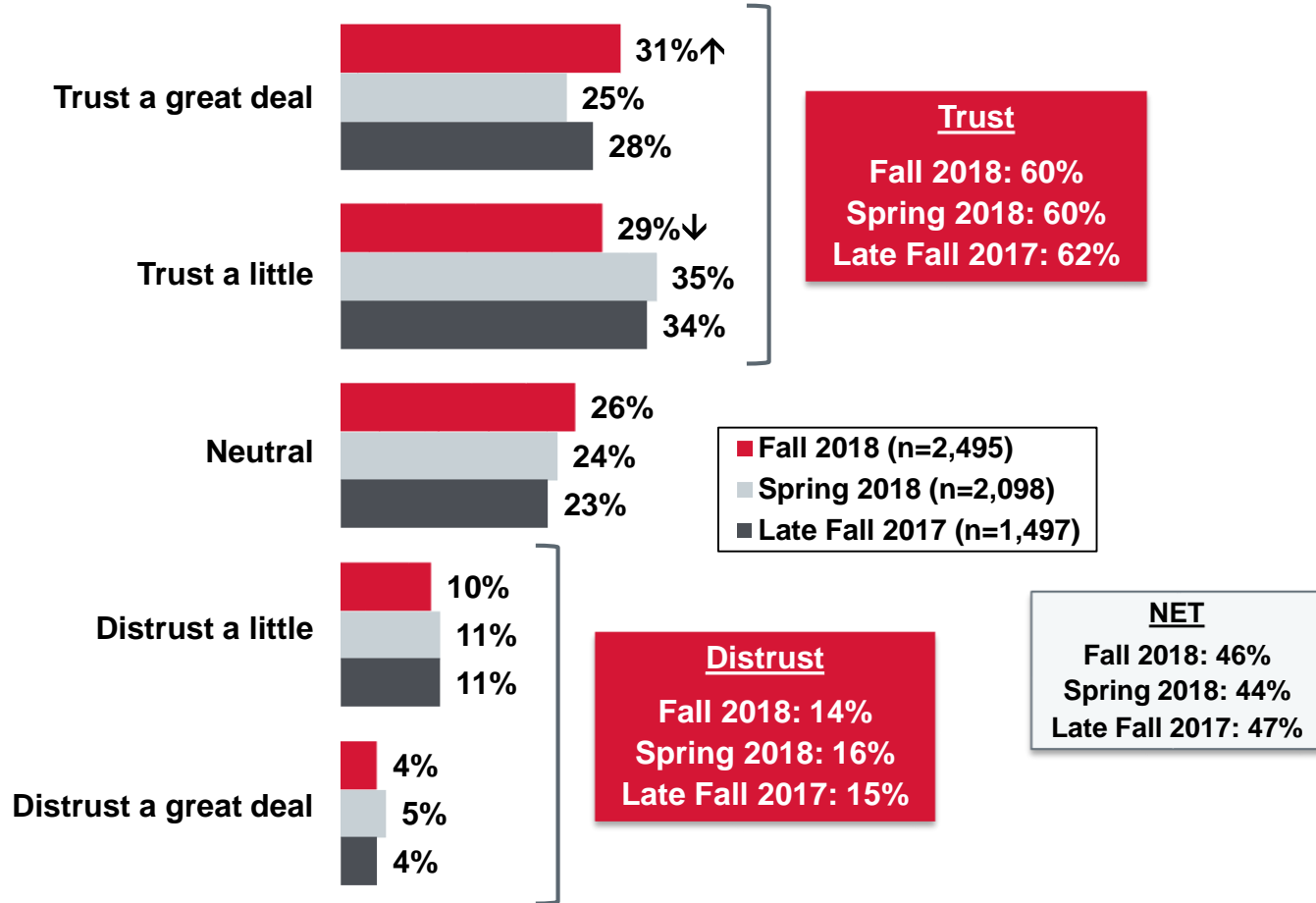
\*Rounding

Taking into account all of the things which you think are important, how favourable or unfavourable is your overall opinion or impression of The City of Calgary?

Base: Valid respondents



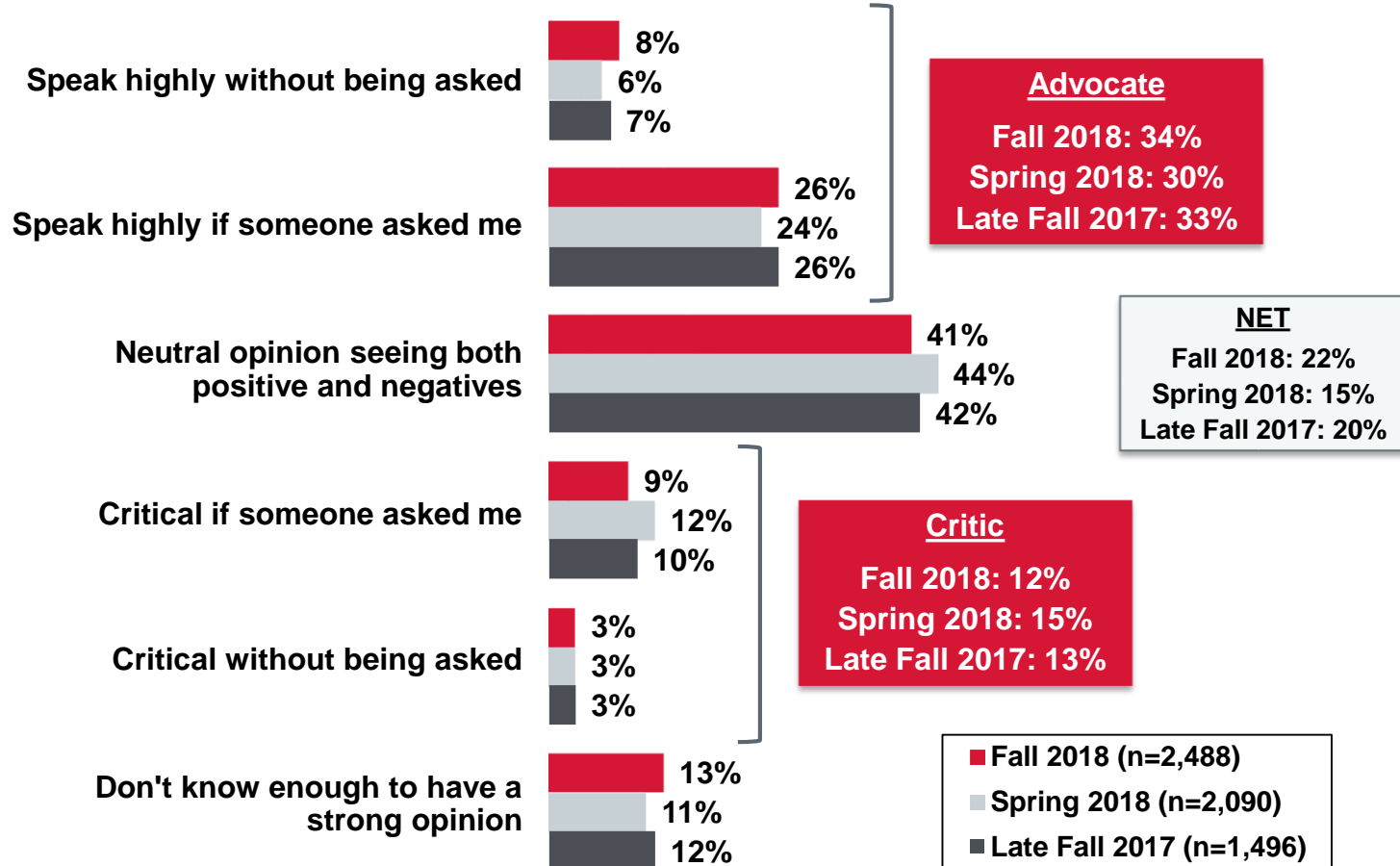
# Trust



Again, taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

Base: Valid respondents

↑Statistically higher than Late Fall 2017



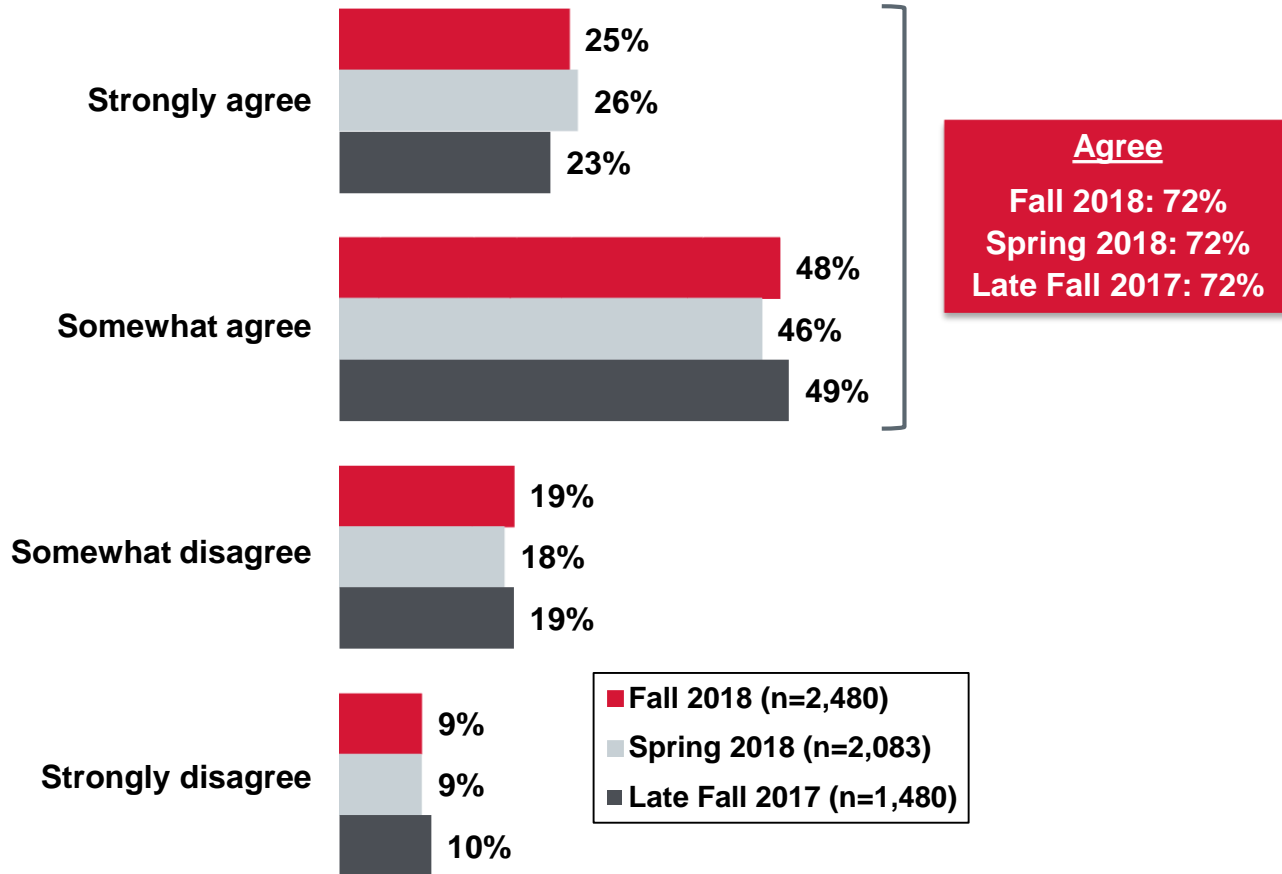
Which one of the following statements best reflects your overall opinion and perceptions of The City of Calgary?

Base: Valid respondents



# Understanding of the Roles of City Council versus City Administration

*I understand the roles and responsibilities of City Council compared to those of City Administration*



*Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement: I understand the roles and responsibilities of City Council compared to those of City Administration.*

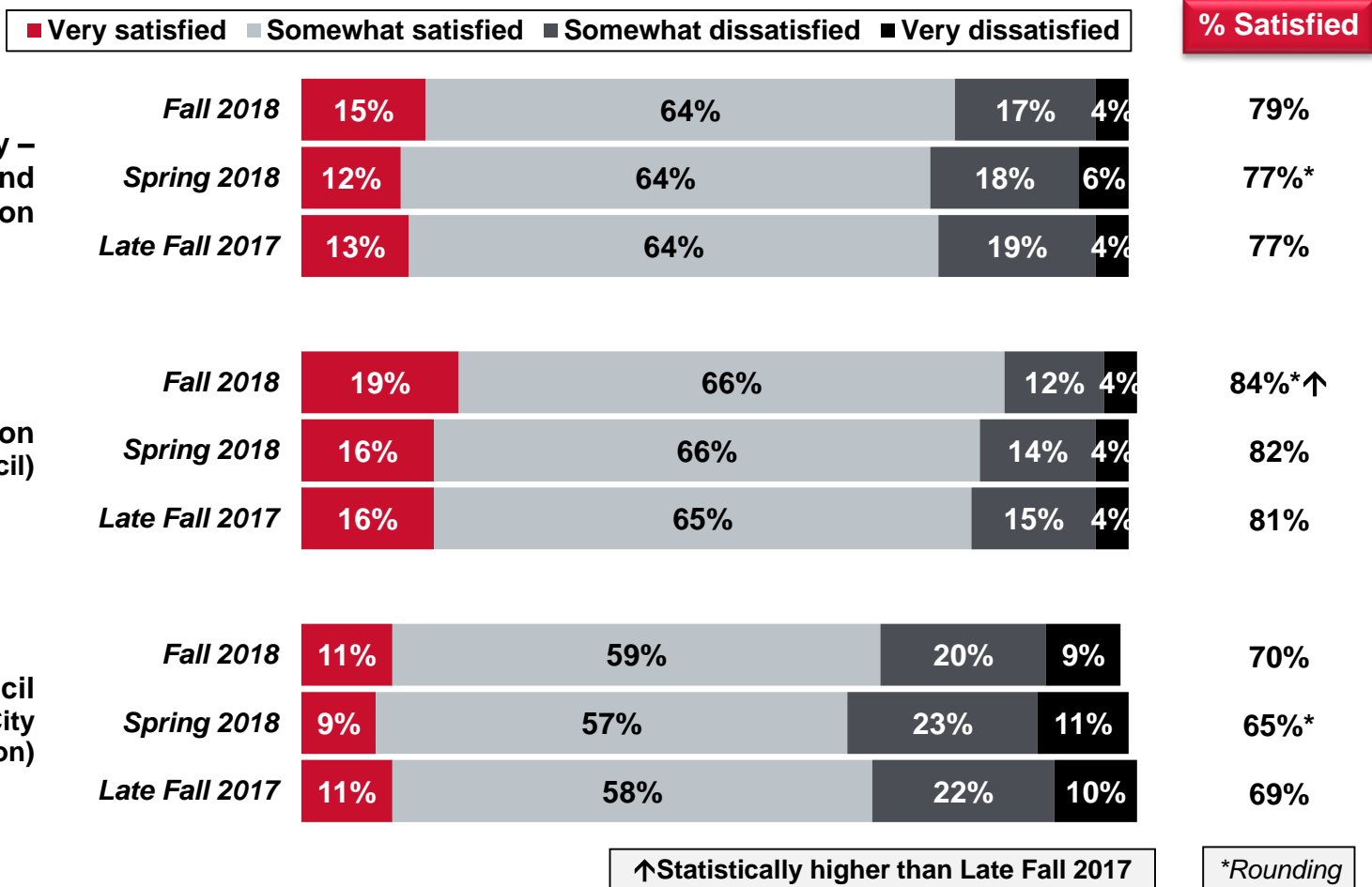
\*Rounding

Base: Valid respondents



# Perceptions About City Performance

As you may know, **City Council** is made up of elected officials who are the legislative body that govern The City. While **City Administration** is made up of non-elected employees at The City who are responsible for the management and running of local services. In other words, public servants who administer services, facilities, safety and infrastructure for communities.



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)





# Attitudes Regarding Collaboration

■ Strongly agree 
 ■ Somewhat agree 
 ■ Somewhat disagree 
 ■ Strongly disagree

**% Agree**

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



Please tell me whether you agree or disagree with each of the following statements?  
 Base: Valid respondents (Bases vary)

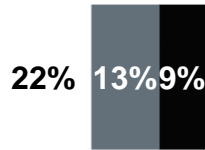
\*Rounding



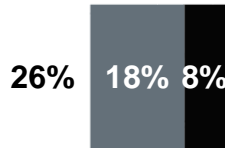
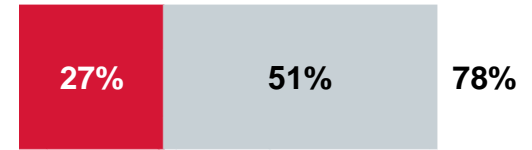
# Perceptions of Transparency and Citizen Input

% Disagree

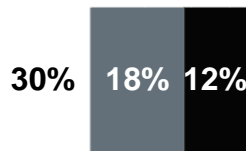
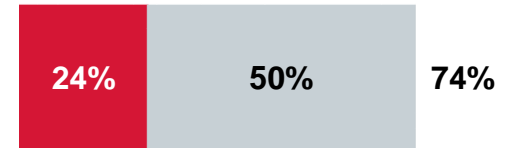
% Agree



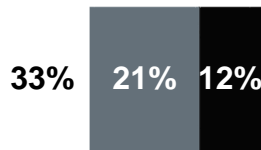
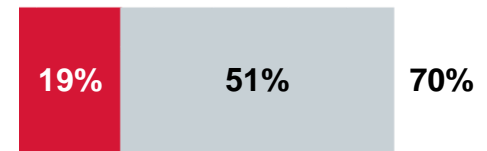
The City of Calgary practices open and accessible government



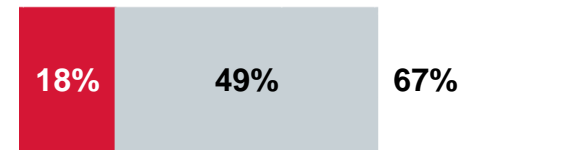
<sup>1</sup>I am confident that The City of Calgary is working to improve how it includes citizen input into important decisions



The City uses input from Calgarians in decision-making about City projects and services



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



Somewhat disagree ■ Strongly disagree ■

■ Strongly agree ■ Somewhat agree

*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?*

<sup>1</sup>Please tell me whether you agree or disagree with each of the following statements?

Base: Valid respondents (Bases vary)



# Tracking Perceptions of Transparency and Citizen Input

% Agree

The City of Calgary practices open and accessible government



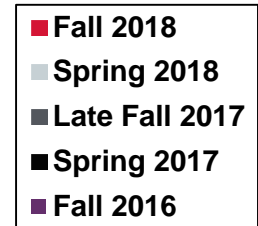
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## Respondent Profile





# Demographics

## Gender

Male	49%
Female	51%

## Education

Completed high school or less	16%
Some post secondary or completed a college diploma	38%
Completed university degree or post-grad degree	46%

## Age

18 to 24	12%
25 to 34	21%
35 to 44	17%
45 to 54	19%
55 to 64	13%
65 or older	17%
<i>Mean</i>	45

## Income

Less than \$30,000	7%
\$30,000 to <\$45,000	8%
\$45,000 to <\$60,000	12%
\$60,000 to <\$75,000	9%
\$75,000 to <\$90,000	8%
\$90,000 to <\$105,000	11%
\$105,000 to <\$120,000	11%
\$120,000 to <\$150,000	12%
\$150,000 or more	23%

Base: Valid respondents (Bases vary)



# Household Characteristics

## Type of Home

Single-detached house	69%
Apartment or apartment-style condominium	13%
Duplex, triplex or fourplex	9%
Townhouse or rowhouse	8%
Another type of multi-dwelling unit	1%

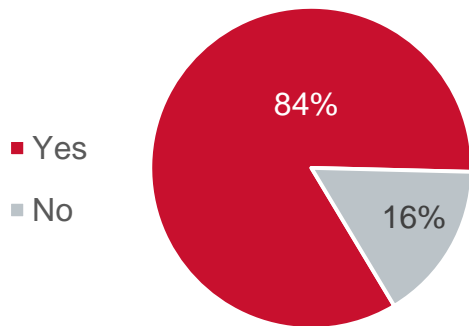
## Children and Seniors in Household

Yes - Children	35%
Yes - Seniors	17%

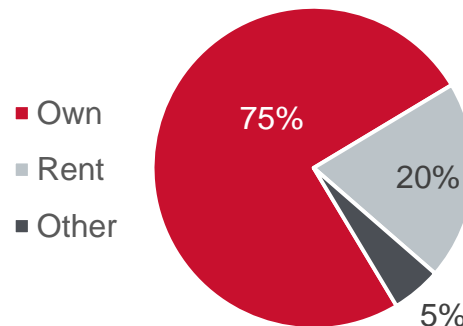
## Household Size

1	14%
2	32%
3	18%
4	22%
5 or more	15%
<i>Mean</i>	3.0

## Responsible for Property Taxes



## Own or Rent



## Tenure in Calgary

Less than 5 years	7%
5 to less than 10 years	10%
10 to less than 15 years	10%
15 to less than 20 years	11%
20 to less than 30 years	24%
30 to less than 40 years	15%
40 or more	24%
<i>Mean</i>	26

Base: Valid respondents (Bases vary)



# Respondent Characteristics

## Born in Canada

Yes	73%
No	27%

## Age Left Country of Birth

Base: Not born in Canada (n=656)

Under the age of 12	28%
12 to 17	12%
18 or older	60%

## Ethnic Background

Caucasian/ White	23%
British	20%
Canadian/ French Canadian	16%
Northern or Western European	12%
Southern or Eastern European	11%
East or Southeast Asian	11%
South Asian	7%
Central/ South American or Caribbean	3%
West Asian or Middle Eastern	2%
African	2%
Aboriginal/ First Nations/ Metis	2%

## Disability

Yes	16%
No	84%

## Visible Minority

Yes	25%
No	75%

Base: Valid respondents (Bases vary)

## Contact

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