2021 Citizen Perspectives Survey: Downtown Calgary

Final Report

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Highlights at a Glance

Downtown Leisure Visitation Frequency

43% Anticipate visiting downtown for leisure purposes once a month or more often in the **first six months of 2022**

54% Visited downtown for leisure purposes once a month or more often **pre-pandemic**

Likelihood to Engage in Activities Downtown

70% Agree 'I love going downtown because of the variety of dining options'

Reasons for Visiting Downtown

87% Be entertained / have fun

76% Spend time with family / friends

76% Enjoy the arts and culture scene

76% See or do something new or different

Concerns with Visiting Downtown

78% Don't drive downtown because **parking** is too expensive

51% Agree the **COVID-19 pandemic** makes them hesitant to go downtown

52% State **safety concerns** influence their decision to visit downtown for leisure

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Background and Methodology

Background

The City of Calgary surveys citizens about their opinions, preferences, and attitudes in order to help support data-driven City decision-making. The Citizen Perspectives Survey is one of the ways by which data are collected, and this survey is conducted multiple times throughout the year. This wave focused on perceptions of and intention to visit downtown Calgary by Calgarians not living within the Greater Downtown boundaries.

Methodology

The survey was conducted by Leger from December 9 – 19, 2021 with 500 Calgarians (aged 18 years or older) **who reside outside of downtown** via phone using random digit dialing (RDD). All mentions of ‘Calgarians’ within this report refer to Calgarians living outside the Greater Downtown boundaries.

The survey was conducted using numbers from both landlines (25% of completed surveys) and cell phones (75%) to obtain a random and statistically representative sample of Calgarians. The survey averaged 18 minutes in duration. The margin of error (MOE) for the total sample of n=502 is ± 4.4 percentage points, 19 times out of 20.

To ensure the data were gathered from a representative group of Calgarians, sample quotas were set by age, gender, and city quadrant of the general population aged 18 and older. Data were then weighted to the 2016 Federal Census for age and gender.

Note:
Statistically significant differences across subgroups (e.g., gender, age, quadrant of residence, income) are noted throughout the report, where applicable. For questions that were asked of only a portion of respondents, subgroup sample sizes might be too small to identify differences.

Key Findings

1. **Downtown visitation for leisure purposes is expected to be less frequent than pre-pandemic times in the first six months of 2022.**
2. **Both concerns about COVID-19 and concerns about safety are likely to influence the decision to visit downtown for half of Calgarians that do not live within the Greater Downtown boundaries.**
3. **Downtown Calgary is a more desirable destination for younger respondents. Given the larger disposable incomes of older respondents, options to make downtown more desirable to this group should be considered.**
4. **Residents of the Southeast are less likely to consider the downtown desirable. They are more likely than other quadrants to indicate that their travel time to downtown from their residence is unreasonable.**
5. **The activities respondents visiting downtown are most likely to participate in, in the coming year, are dining in restaurants, attending live theatre or concerts, visiting a park or plaza, and attending a festival or event. On both an aided and unaided basis, restaurants are a prominent part of downtown leisure visitation.**
6. **Of those who plan to visit downtown in the first six months of 2022, entertainment, quality time with friends and family and unique experiences are also key factors that draw them into downtown.**
7. **Though shopping does appear as an activity respondents will engage in while downtown, it is unlikely to be driving visitation as only a minority prefer shopping downtown to shopping elsewhere.**
8. **Parking is a key issue preventing Calgarians that live outside of downtown from visiting more frequently or staying longer. Both affordability and availability are mentioned, but there is also a lack of awareness of where to park.**
9. **Overall, downtown Calgary is viewed as ‘safe’ by the majority of respondents. However, feelings of safety erode in the evening, especially among females.**

Detailed Results

Visitation Frequency

Visitation Frequency

The majority of respondents do not expect to work or attend school downtown in the first six months of 2022.

- Nearly six-in-ten (58%) respondents indicate they will **never** work or attend school downtown between January and June of 2022.
  - Females are more likely than males to indicate they will ‘never’ work or attend school downtown in the first six months of the year (64% vs. 54% respectively), as are older respondents (77% 65+ vs. 54% 35-64 and 50% 18-34) and retired respondents (80% retired vs. 50% employed and 40% unemployed).
  - Those respondents living in the Southeast are also more likely to indicate they will ‘never’ work or attend school downtown in early 2022 (71% SE vs. 53% NW and 52% SW), as are those without children in their household (62% vs. 52% with children in their household).
- Close to one-in-five (18%) respondents plan to work or attend school downtown **at least once a week** (or more frequently during the first six months of 2022.
  - Males are more likely than females to anticipate working or attending school downtown at least once a week (22% vs. 13% respectively). Those who have completed a university or post-grad degree are more likely to frequent downtown for school or work (24% vs. 13% who completed high school or less and 10% who completed some post secondary or a college diploma), as are those with higher incomes (26% $135K+ vs. 10% <$45K).

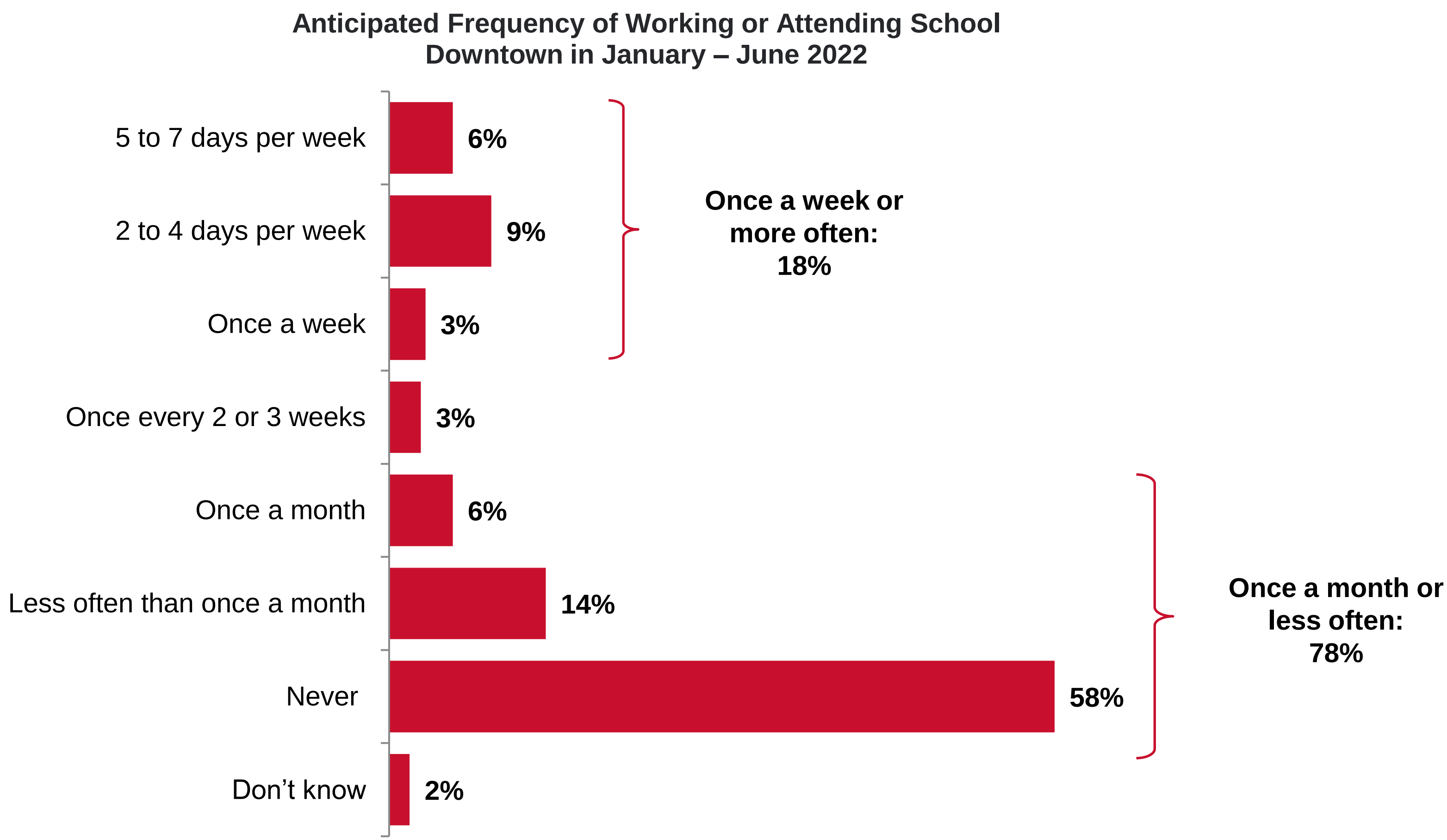
Visitation Frequency (cont'd)

Downtown visitation for <u>leisure purposes</u> is expected to be less frequent than pre-pandemic times in the first six months of 2022.

- Prior to the pandemic, 54% of respondents visited downtown for leisure purposes **once a month or more frequently**. In the first six months of 2022, only 43% of respondents expect to visit with that frequency.
  - Males are more likely than females to expect they will visit downtown once a month or more often in the first half of 2022 (49% vs. 35% respectively), as are younger respondents (64% 18-34 vs. 40% 35-64 and 28% 65+).
  - Similar to working or attending school downtown, residents of the Southeast are less likely to visit once a month or more often (30% SE vs. 47% NW and 49% SW) as are retired respondents (27% vs. 46% employed and 65% unemployed).

Frequency of Working Downtown

Fewer than one-in-five respondents (18%) anticipate working or attending school downtown once a week or more often in the first half of 2022.

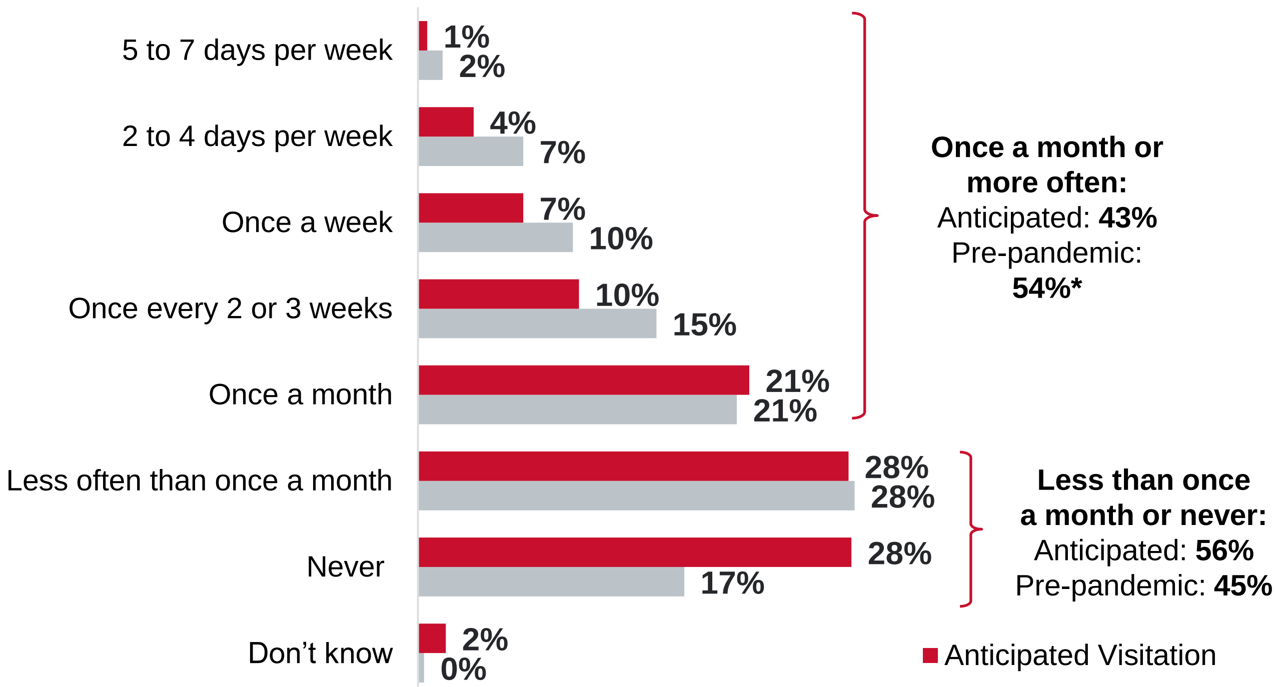


Q: How often do you think you will work or attend school downtown in the first six months of 2022?
Base: Respondents who live outside of downtown (n=502)

Downtown Leisure Visitation Frequency

Downtown visitation for leisure purposes is expected to be less frequent than pre-pandemic times in the first six months of 2022. Prior to the pandemic just over half (54%) of respondents visited downtown once a month or more, while just over two-fifths (43%) anticipate visiting with this frequency in the first six months of 2022. Notably, only 17% indicate they never visited downtown for leisure purposes prior to the pandemic, but in the first six months of 2022, more than one-quarter (28%) do not plan to visit downtown.

Pre-pandemic and Anticipated Frequency of Downtown Leisure Visits



*Rounding

Q: In a typical year, prior to the beginning of the pandemic, how often did you visit downtown for leisure purposes? / In the first six months of 2022, how often do you think you will visit Calgary's downtown for leisure purposes?
Base: Respondents who live outside of downtown (n=502)

Leisure Preferences

Leisure Preferences

Downtown Calgary is a more desirable destination for younger respondents.

- Just over half of respondents (55%) feel that downtown Calgary is a desirable location for their leisure time.
  - Younger respondents, aged 18-34, are more likely to find downtown Calgary **desirable** (70% vs. 53% 35-64 and 45% 65+).
  - On the other hand, residents of the Southeast are more likely to consider downtown **undesirable** (57% vs. 42% NE, 41% NW and 38% SW), as are those who have lived in Calgary longer (46% 20+ years vs. 34% <10 years).

Eating out in restaurants and cafes is the most common image that comes to mind for respondents when thinking of leisure visits to downtown.

- Top-of-mind, eating out / restaurants is the most likely image to come to mind for respondents when thinking about a downtown leisure visit in their own city, with nearly one-quarter (23%) mentioning this activity. Parks, gardens and plazas (15%) and events / entertainment (12%) are also mentioned by more than one-in-ten respondents.
- This sentiment is reinforced by high levels of agreement with the following statement: '*I love going downtown because of the variety of dining options*' (70% 'agree,' including 28% who 'strongly' agree). Younger respondents are more likely to agree with this statement than older respondents (84% 18-34 vs. 71% 35-64 vs. 50% 65+), as are those with children in the household (77% vs. 67% without children in their household).

Of those who plan to visit downtown in the first six months of 2022, entertainment, quality time and unique experiences are key factors that draw them into downtown.

- More than three-quarters agree that entertainment / having fun (87%), spending time with friends and family (76%), enjoying the arts and culture scene (76%), and experiencing something new or different (76%) are reasons they would choose to go downtown.
- Further, more than half agree that '*my leisure trips downtown are usually based on festivals and events in the area*' (57%) or that '*Calgary's arts and culture scene has a big influence on my trips downtown*' (53%).

Calgary

Leisure Preferences

Thinking of 2022, the activities respondents are most likely to participate in when visiting downtown include dining in restaurants, attending live theatre or concerts, visiting a park or plaza, and attending a festival or event.

- More than three-quarters of respondents planning to visit downtown in the near future say they are likely to dine in restaurants (86%), attend live theatre or concerts (78%), or visit a park or plaza (76%) at some point in the coming year.
  - Those who are employed are more likely than those who are retired to mention dining in restaurants as an activity they are likely to engage in downtown (88% vs. 78% respectively).
  - Females are more likely than males to attend live theatre or concerts downtown (84% vs. 73% respectively), as are respondents with two people in their household (87% vs. 74% living alone and 73% with 3 or more people in their household).
  - Calgarian downtown visitors aged 25-34 are more likely than others to visit a park or plaza (89% vs. 79% 34-54, 71% 55-64, 69% 65+ and 69% 18-24).
- Attending a festival or event (74%), visiting museums or art galleries (69%) and shopping (66%) are also likely activities for the majority of respondents planning to visit downtown.
  - Those who have large households (3 or more people) are more likely to go shopping while downtown (73% vs. 58% from a two-person household and 57% who live alone).
  - Though shopping does appear as an activity respondents will engage in while downtown, it is likely not be driving visitation as only 23% agree '*I prefer shopping downtown to shopping elsewhere.*' Those aged 18-24 are more likely to prefer shopping downtown (40% vs. 19% 25-34, 21% 35-54, 20% 55-64, 23% 65+), as are those who reside in the Northeast (37% vs. 22% NW, 21% SW, and 16% SE) and those not born in Canada (30% vs. 20% born in Canada).
- Attending a sporting event as a spectator (58%), sightseeing (56%) and visiting a library (56%) are mentioned by more than one half as likely activities for them to engage in. Fewer intend to engage in indoor or outdoor fitness (41%), go to nightclubs or bars (37%), a movie (36%), a spa (19%) or a casino (16%) while downtown.

Leisure Preferences

Of the specific downtown locations tested, Prince's Island Park is most likely to be visited in 2022.

- A large majority (82%) of respondents planning to visit downtown in early 2022, indicate they are likely to visit Prince's Island Park at some point in the coming year. Nearly one-half (45%) indicate they are 'very' likely to visit this park.
  - Those who were not born in Canada are more likely to indicate they would visit this park (89% vs. 80% born in Canada). Older respondents, aged 65+, are less likely to indicate they would visit Prince's Island Park than those aged 35-64 (72% vs. 86%, respectively).
- The East Village (including the River Walk and St. George's Island) and Stephen Avenue are both likely to be visited by three-quarters (75%) of those planning a downtown trip.
  - Stephen Avenue is less likely to be visited by those that are 65+ (58% vs. 79% 18-34 and 79% 35-64) or have completed high school or less (59% vs. 78% with some post secondary education or completed a college diploma, university degree or post-grad degree).
- While not as popular, Eau Claire market area (62%), Chinatown (56%) and Olympic Plaza (54%) are still mentioned by more than one-half of those planning to visit downtown.
  - Olympic Plaza is more likely to be visited by racialized respondents (62% vs. 49% not racialized), those who are newer to Calgary (65% <10 years vs. 51% 20+ years), and those who were not born in Canada (63% vs. 51% born in Canada).

While many respondents planning to visit downtown feel there are plenty of seating options, few feel there are sufficient public washrooms available.

- Seven-in-ten (70%) respondents planning to visit downtown in early 2022 agree there are enough benches and seating downtown for their needs. However, only one-third (34%) feel there are enough public washrooms available downtown.
  - Those aged 65+ are less likely to agree there is sufficient seating downtown (58% vs. 78% 18-34).

Leisure Preferences

The COVID-19 pandemic is making half of all respondents hesitant to go downtown.

- Half (51%) of respondents agree that the lingering COVID-19 pandemic makes them hesitant to go downtown, while 49% disagree.
  - Respondents who were not born in Canada are more likely to agree the COVID-19 pandemic makes them hesitant to go downtown (61% vs. 47% born in Canada). Those residing in the Southeast are less likely than those in the Northwest or Southwest to agree the pandemic makes them hesitant to visit (39% SE vs. 57% NW and 55% SW).

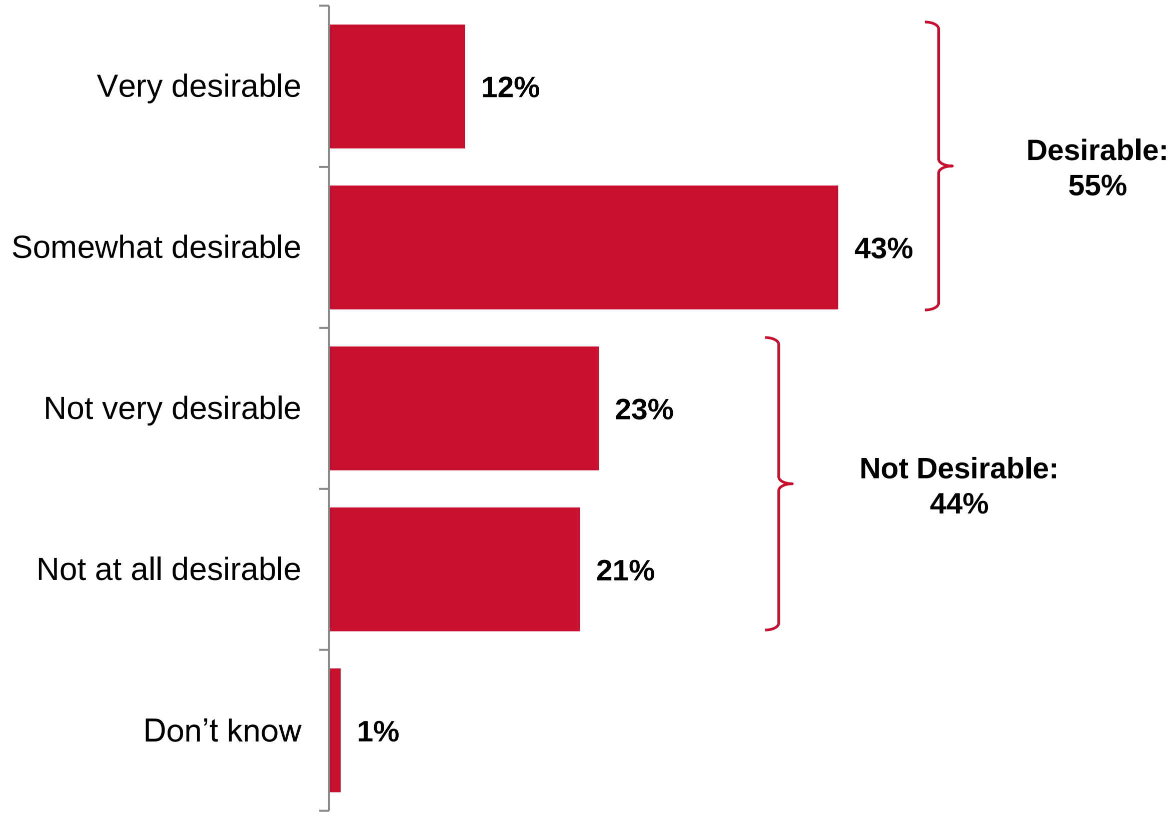
When asked about lacking features or amenities that may be preventing them from visiting more often or staying longer, mentions include parking, a lack of activities and other issues/concerns.

- Offering more events or activities downtown could also benefit the area with 17% mentioning a lack of activities / events as a factor that prevents them from visiting more often or staying longer.
- Mobility / transportation issues (11%), social and safety concerns (8%) and a general lack of / variety of amenities (8%) are additional reasons given for not visiting more often or shorter visits.
  - Two-in-five (41%) respondents planning a visit downtown feel they '*tend to stick to one area when downtown because it's too difficult to get from place to place.*'
    - Females are more likely to agree with this statement than males (49% vs. 35%, respectively), as are those with children in their household (50% vs. 36% who do not live with children).
  - Further, nearly two-thirds (64%) agree '*I like sticking to familiar places downtown, so I feel safe and comfortable.*'
    - Females are more likely to agree than males to agree with this (72% vs. 58%, respectively). Younger respondents are also more likely to agree with this statement (77% 18-34 vs. 60% 35-64 and 58% 65+).

Desirability of Downtown for Leisure Visits

Respondents are split on whether downtown is a desirable destination for their leisure time, with slightly more than half (55%) viewing downtown as desirable and slightly fewer considering downtown undesirable (44%). Of note, only 12% find the downtown 'very' desirable.

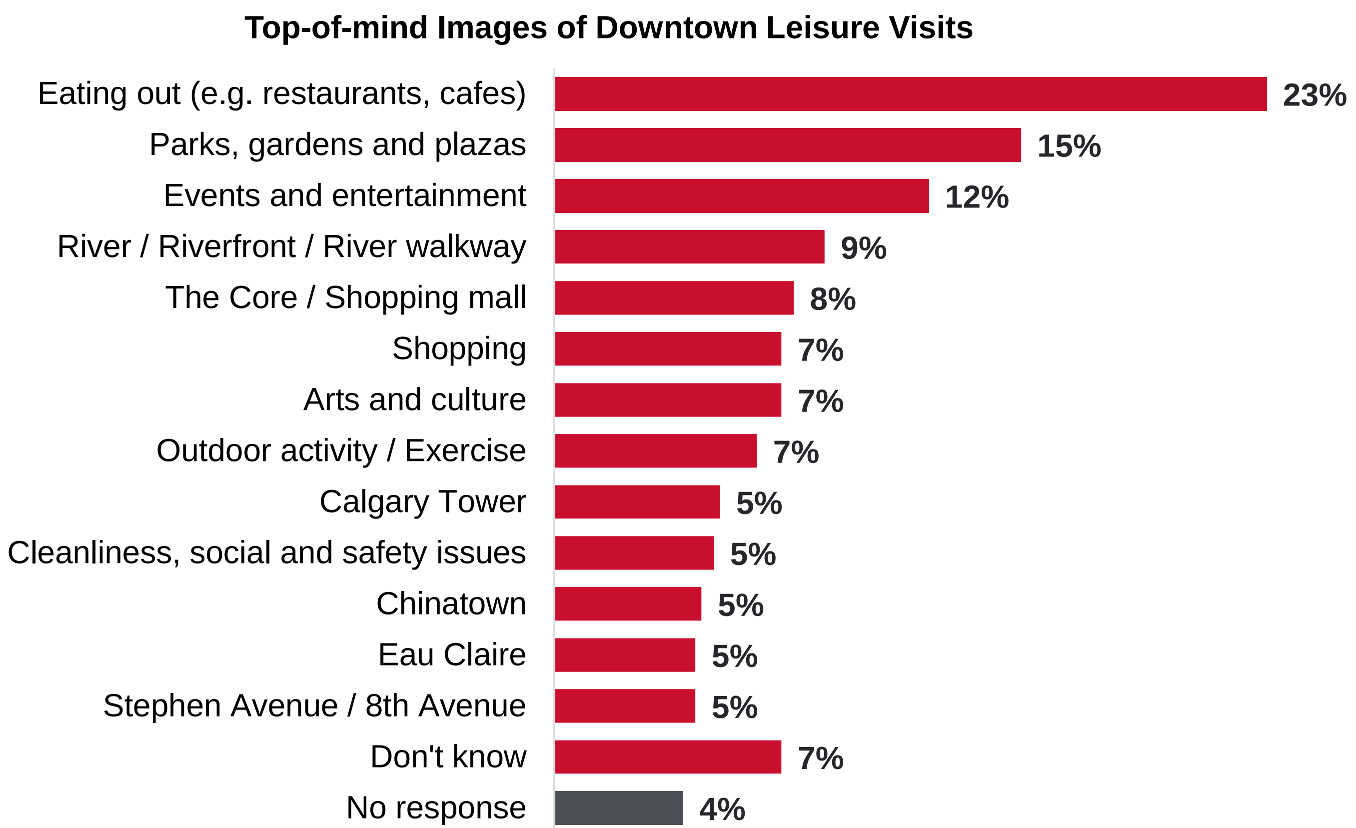
Desirability of Downtown as a Leisure Destination



Q: Overall, how desirable is Calgary's downtown as a destination for your leisure time?
Base: Respondents who live outside of downtown (n=502)

Top-of-Mind Downtown Leisure Images

When asked about what images come to mind when thinking about downtown leisure visits, about one-quarter (23%) mention eating out at restaurants and cafes. This is followed by parks, gardens, and plazas (15%) and the events and entertainment (12%) of downtown.



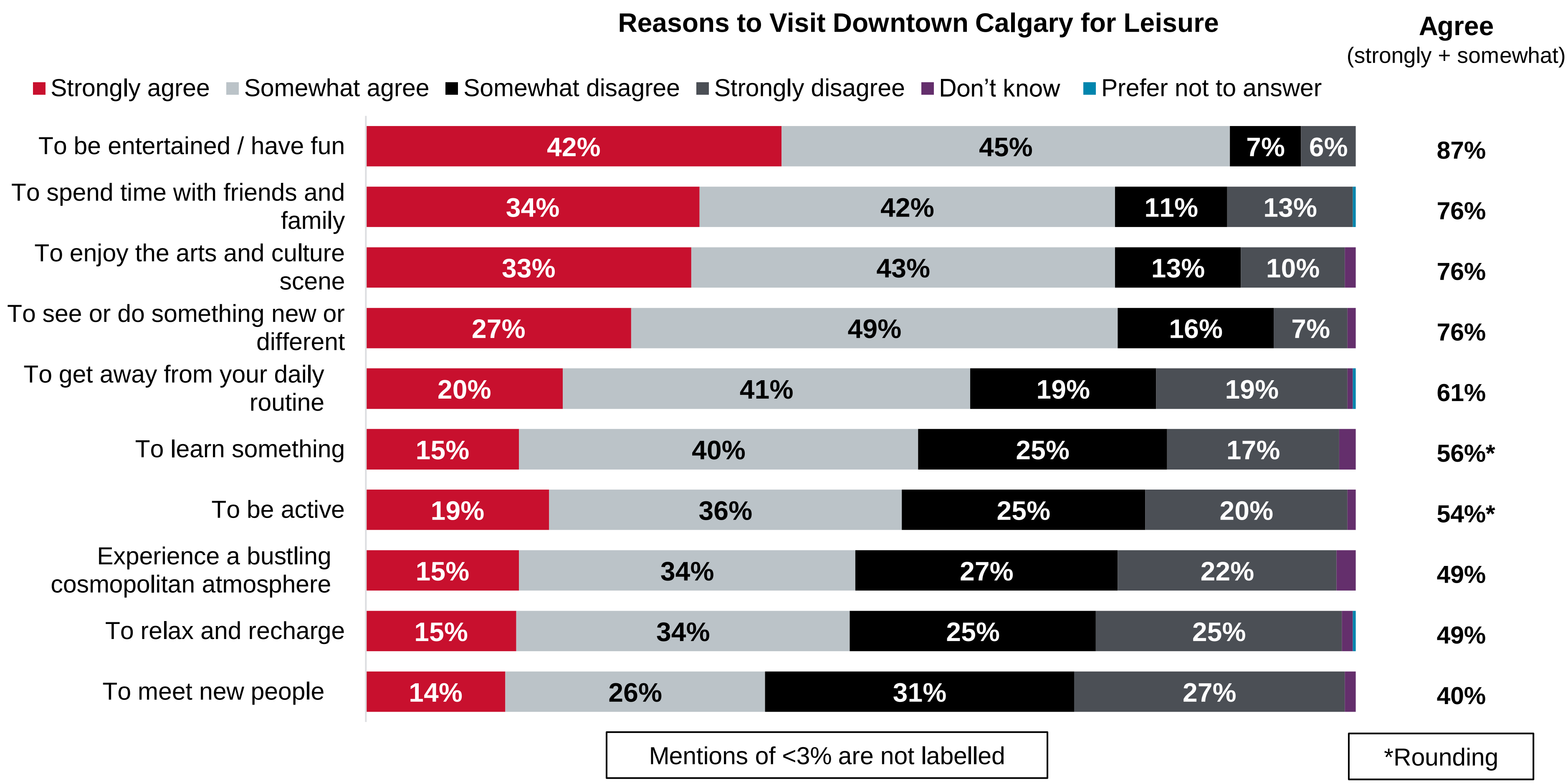
Mentions of <5% are not shown

Multiple responses allowed

Q: Keeping in mind that Calgary's Greater Downtown includes the downtown core, the Beltline, East Village, Chinatown, Eau Claire and Downtown West, what images come to mind when you think of a leisure visit to downtown Calgary?
Base: Respondents who live outside of downtown (n=502)

Reasons to Visit Downtown

The most common planned reason to come downtown among those who plan to visit is to be entertained and to have fun (87%), followed by spending time with friends and family (76%), enjoying arts and culture (76%) and experiencing something different (76%).



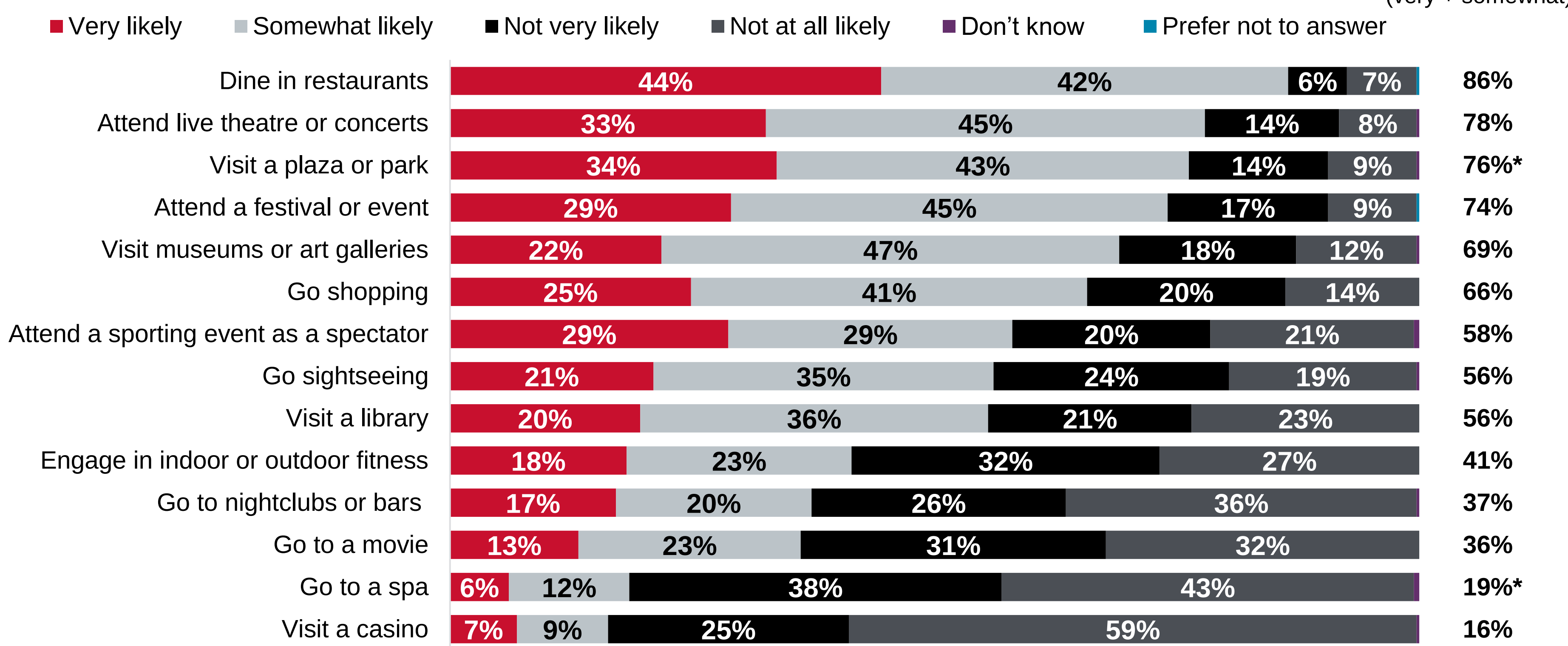
Q: To what extent do you agree or disagree that the following are reasons you would choose to go downtown in the coming year?
Base: Respondents who live outside of downtown and plan to visit downtown at least once in the first 6 months of 2022 (n=362)

Likelihood to Participate in Activities

Among those who plan to visit downtown, the most likely activity they will engage in is dining at a restaurant (86%), followed by attending live theatre or concerts (78%), visiting a plaza or park (76%), and attending a festival or event (74%).

Likelihood of Participating in Various Leisure Activities Downtown

Likely
(very + somewhat)



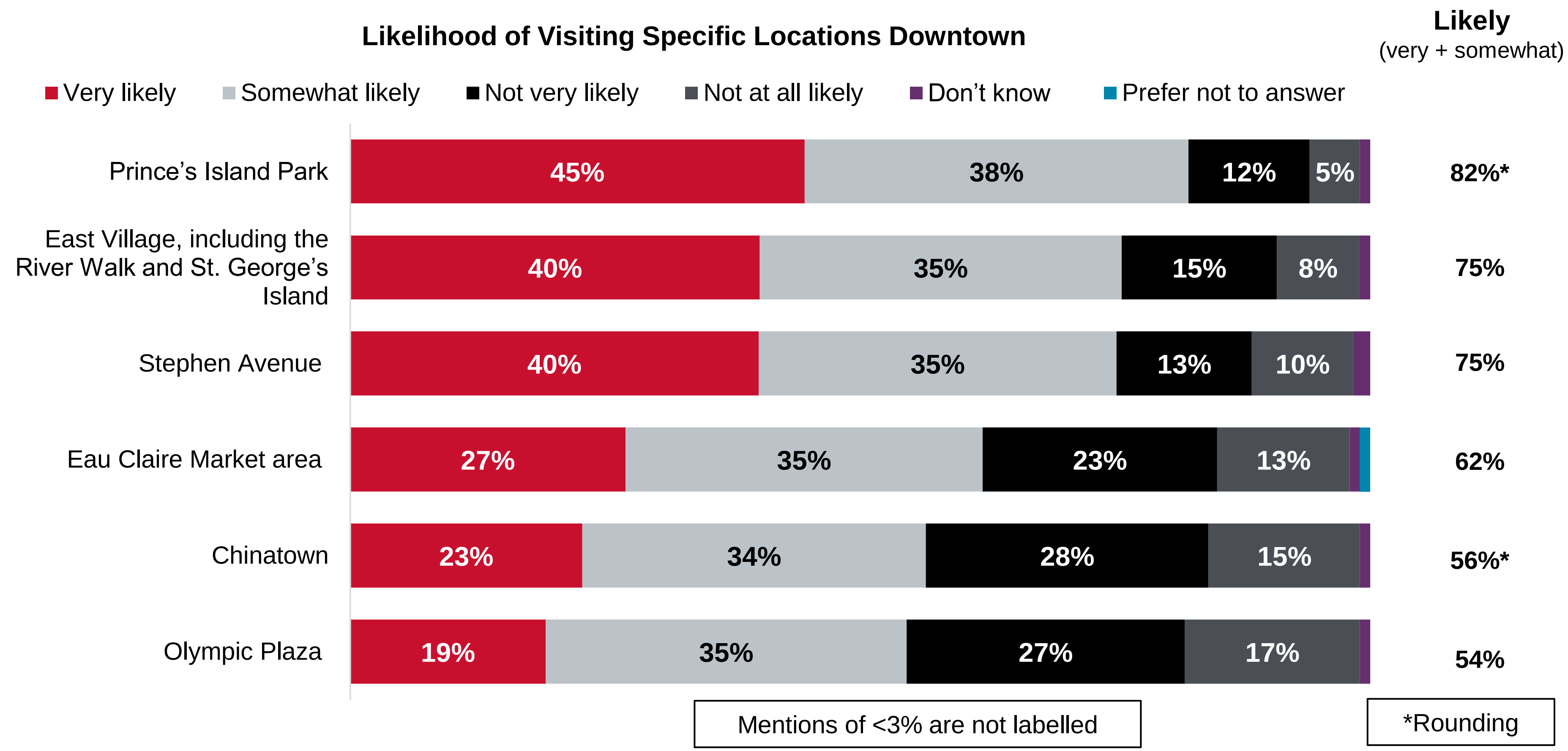
Mentions of <3% are not labelled

*Rounding

Q: I am going to read you a list of types of activities that people may do downtown. Please tell me how likely or unlikely you are to participate in each activity downtown in the coming year.
Base: Respondents who live outside of downtown and plan to visit downtown at least once in the first 6 months of 2022 (n=362)

Visitation Likelihood for Specific Locations

Prince's Island Park (82%) is the most popular downtown location for a leisure visit among those who are likely to visit, followed by the East Village (75%) and Stephen Ave (75%).

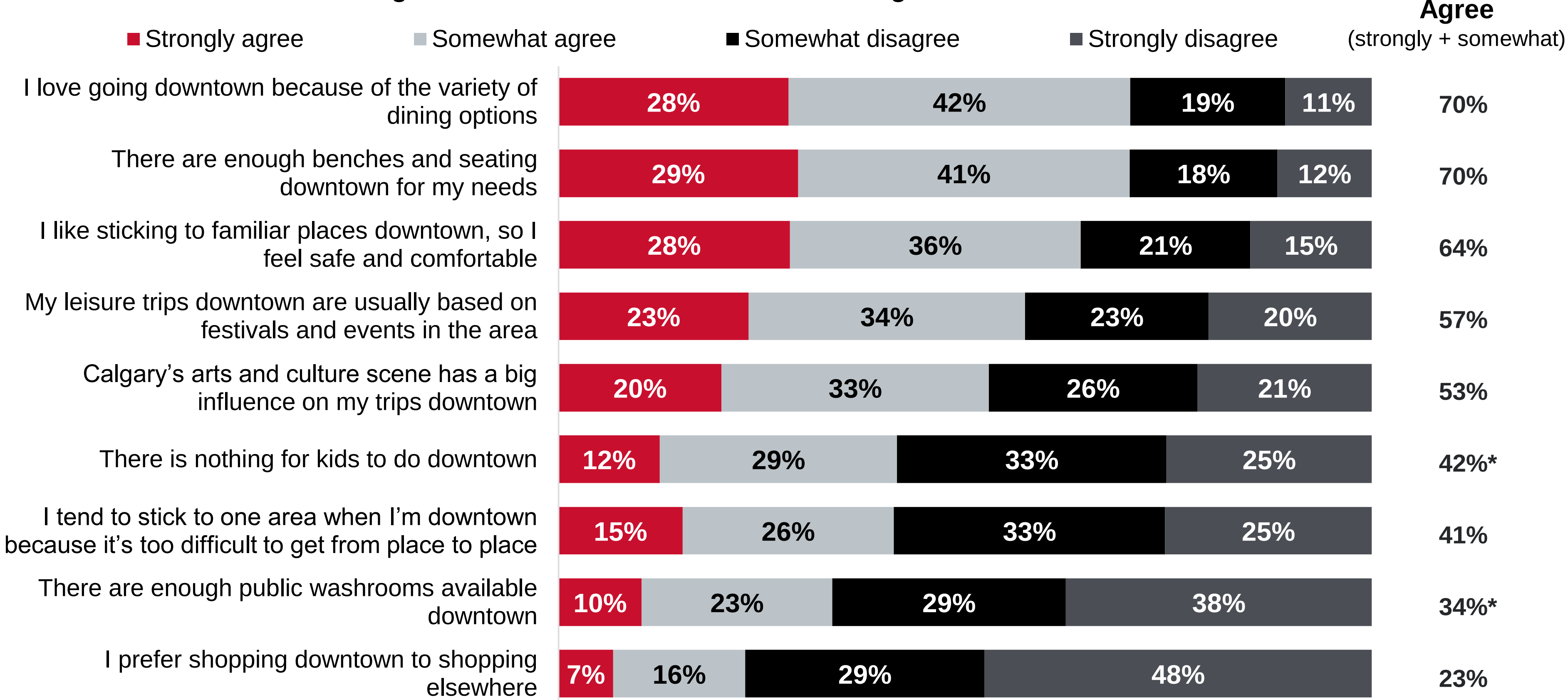


Q: Now, I'm going to read a list of locations in downtown Calgary. For each one, please tell me how likely or unlikely you are to visit each location in the coming year for leisure.
Base: Respondents who live outside of downtown and plan to visit downtown at least once in the first 6 months of 2022 (n=362)

Perceptions of Downtown as a Leisure Destination

The majority of respondents (70%) agree they “love going downtown because of the variety of dining options.” Additionally, while seven-in-ten (70%) agree there is enough seating available, fewer (34%) agree there are sufficient public washrooms.

Agreement with Statements about Visiting Downtown for Leisure



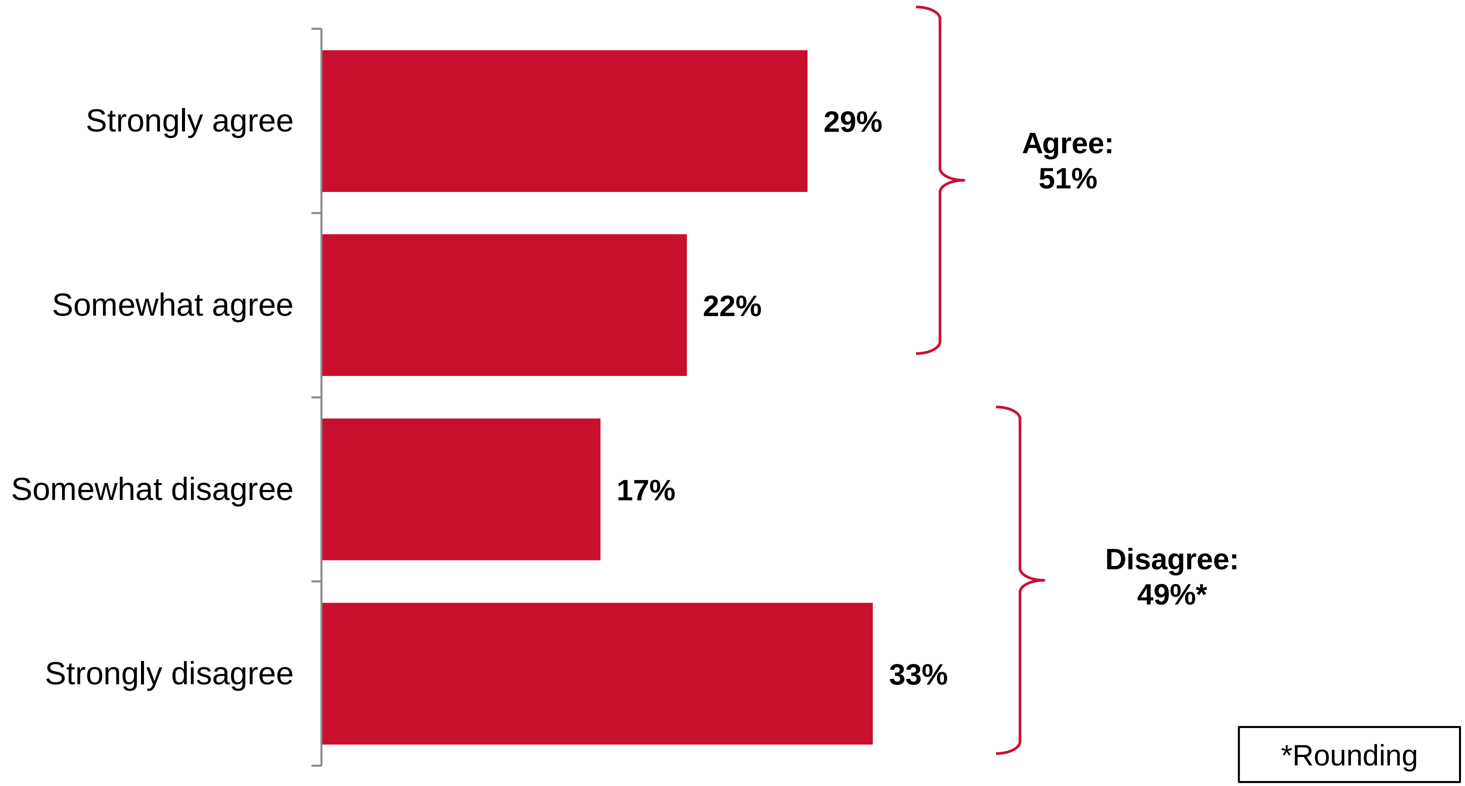
Q: To what extent do you agree or disagree with the following statements?
Base: Respondents who live outside of downtown and plan to visit downtown at least once in the first 6 months of 2022 – Not Applicable, Don’t Know, and Prefer Not to Answer responses removed (bases vary)

*Rounding

Impact of COVID-19 on Intention to Visit

Respondents are split down the middle with half (51%) agreeing that the lingering COVID-19 pandemic makes them hesitant to go downtown and half (49%) disagreeing. The difference is polarized, with the majority of each group ‘strongly’ agreeing or disagreeing on this point.

Agreement the Pandemic Generates Hesitation to Visit Downtown

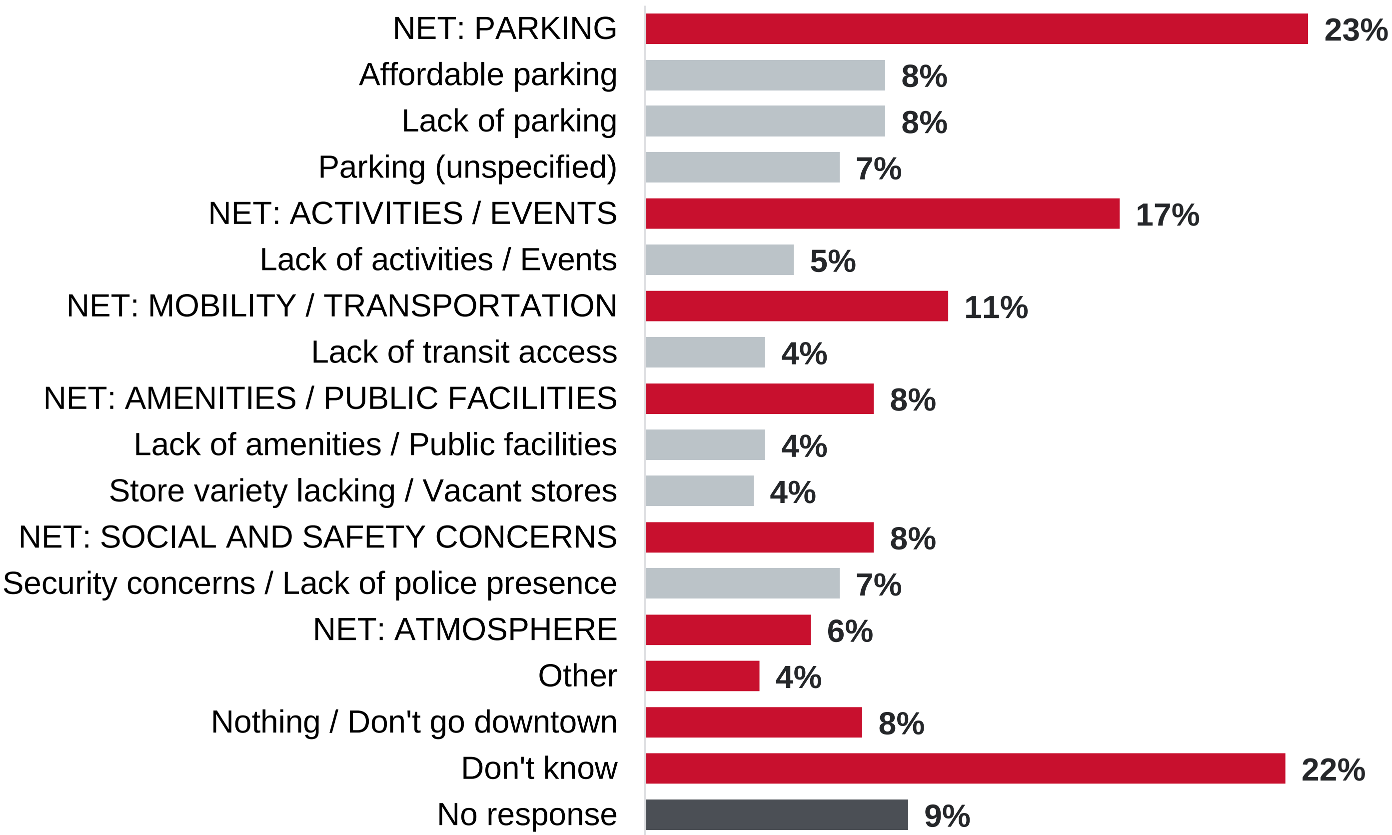


Q: To what extent do you agree or disagree that the lingering COVID-19 pandemic makes you hesitant to go downtown?
Base: Respondents who live outside of downtown - Not Applicable, Don’t Know, and Prefer Not to Answer responses removed (n=488)

Improvement Opportunities

The cost and availability of parking (23%) is the largest gap that needs to be addressed downtown to increase visitation, followed by a need for more or better activities and events (17%).

Lacking Features and Amenities that Limit Visitation



Mentions of <4% are not shown

Multiple responses allowed

Q: What, if any, features or amenities are missing from downtown that prevent you from planning to visit more often or staying longer?
Base: Respondents who live outside of downtown (n=502)

Parking and Accessibility

Parking and Accessibility

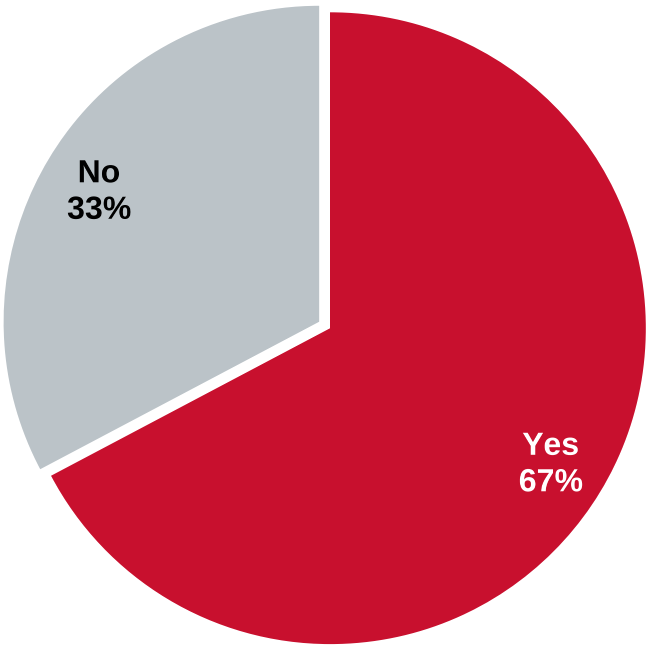
The cost of parking prevents the majority of Calgarian drivers from driving downtown. And, though there are concerns with availability of parking, this may be addressed by raising awareness of parking locations, as many indicate they don’t know where to park.

- Approximately two-thirds (67%) of respondents indicate that, in a typical year, they have driven downtown at some point.
    - Those who have typically driven downtown are more likely to have completed a university or post-grad degree (79% vs. 50% completed high school or less and 59% with some post secondary or completed a college diploma), have a household income exceeding $135K (80% vs. 44% <$45K, 66% $45K-<$75K, 66% $75K - <$105K) and have children in their household (74% vs. 64% without children).
- Of these downtown drivers, 88% feel that travel time from their residence to downtown is reasonable. Despite this most (78%) agree they don’t drive downtown because parking is too expensive.
    - Those residing in the Southeast are more likely than others to disagree that their travel time is reasonable (24% SE vs. 8% for all other quadrants).
- Two-in-five (41%) respondents who have driven downtown in the past feel that the availability of parking meets their needs. However, there may be an awareness issue, given that six-in-ten find parking difficult because they simply don’t know where to park (58%).

Driving Downtown for Leisure Purposes

Prior to the pandemic, in a typical year, two-thirds of respondents (67%) would drive downtown for leisure purposes.

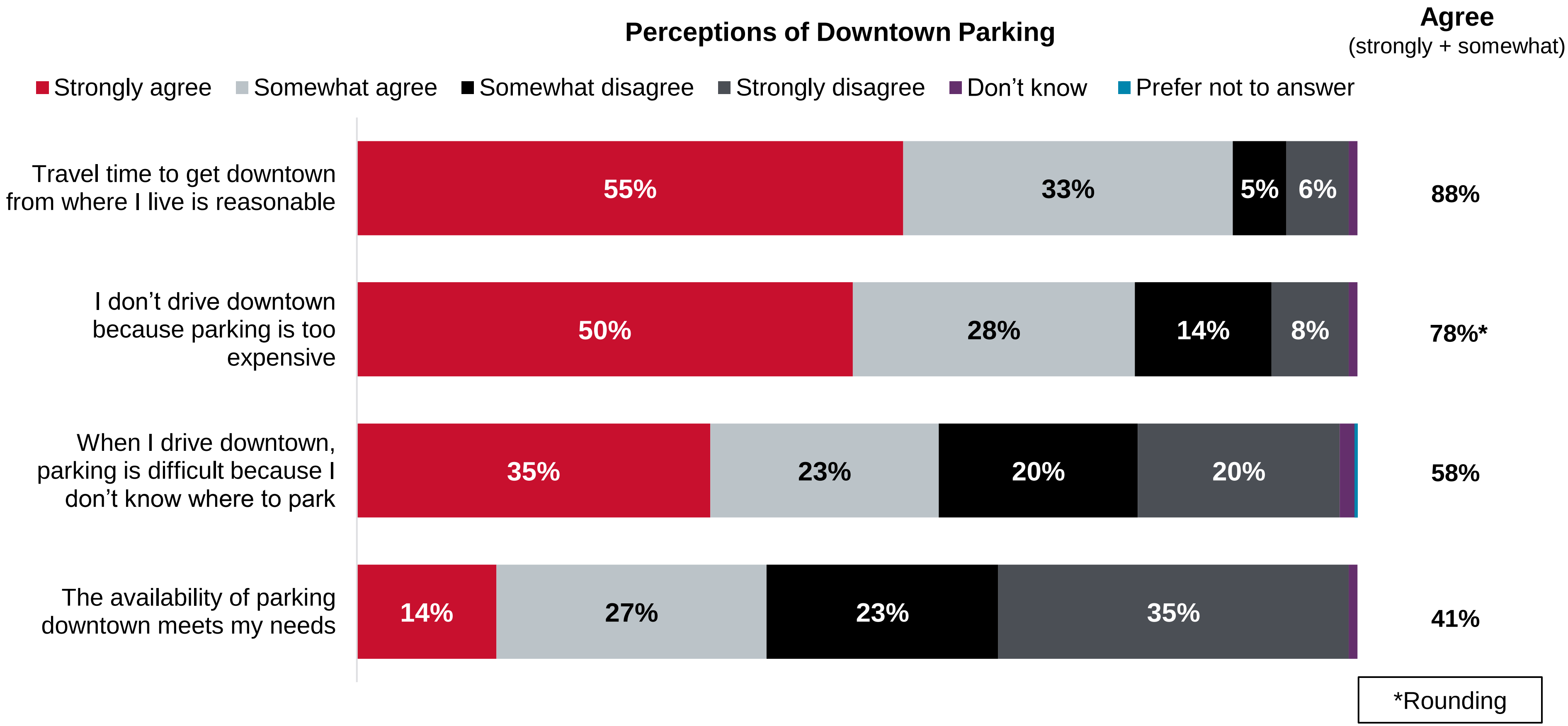
Drove Downtown Prior to Pandemic for Leisure Purposes



Q: In a typical year, prior to the beginning of the pandemic, did you ever drive downtown for leisure purposes?
Base: Respondents who live outside of downtown (n=502)

Downtown Accessibility and Parking

Although a large majority of those who typically drove downtown prior to the pandemic agree that travel time to get downtown is reasonable (88%), many don't drive downtown due to the cost (78%) or difficulty of finding parking (58%). Fewer than half agree the availability of parking downtown meets their needs (41%).



Q: For each of the following statements please tell me the extent to which you agree or disagree:
Base: Respondents who live outside of downtown and typically drove downtown prior to the pandemic (n=337)

Sense of Community & Safety

Calgary

Sense of Community and Safety

The majority of Calgarians who reside outside of downtown feel it is a place for everyone. Despite this, feelings of inclusivity and community downtown could be strengthened.

- Two-thirds (66%) of respondents agree that downtown Calgary is a place for everyone.
    - Residents of the Northeast are more likely to ‘strongly’ agree (40% NE vs. 27% SW, 26% NW and 25% SE) as are racialized respondents (35% vs. 22% who do not identify as racialized) and those not born in Canada (38% vs. 25% born in Canada).
- Though the majority feel downtown Calgary is a place for everyone, only half (49%) feel it is safe for all residents and visitors, regardless of ethnicity, race, religion or sexual identity.
    - Males are more likely than females to ‘strongly’ agree (20% vs. 13%, respectively), as are immigrants (26% vs. 13% of those born in Canada).
- In addition, fewer than half (44%) feel a sense of community when they are downtown.

Overall downtown Calgary is viewed as ‘safe’ by the majority of respondents. However, feelings of safety erode in the evening, especially for females.

- More than six-in-ten (62%) Calgarians that do not live downtown feel Calgary’s downtown is ‘safe,’ though only 15% indicate they feel ‘very’ safe.
- A much larger majority (87%), feel ‘safe’ walking alone downtown during the day. However, when considering walking alone at night, this measure drops considerably with only 38% feeling safe.
    - Males are more likely than females to feel safe walking alone both during the day (90% vs. 83% of females) and at night (56% vs. 17% of females). Those that are newer to Calgary are also more likely to feel safe both during the day (95% <10 years vs. 85% 20+ years) and at night (53% <10 years vs. 37% 10-19 years and 35% 20+ years).
    - respondents with a disability are less likely to feel safe walking alone during the day (71% vs. 89% without a disability).

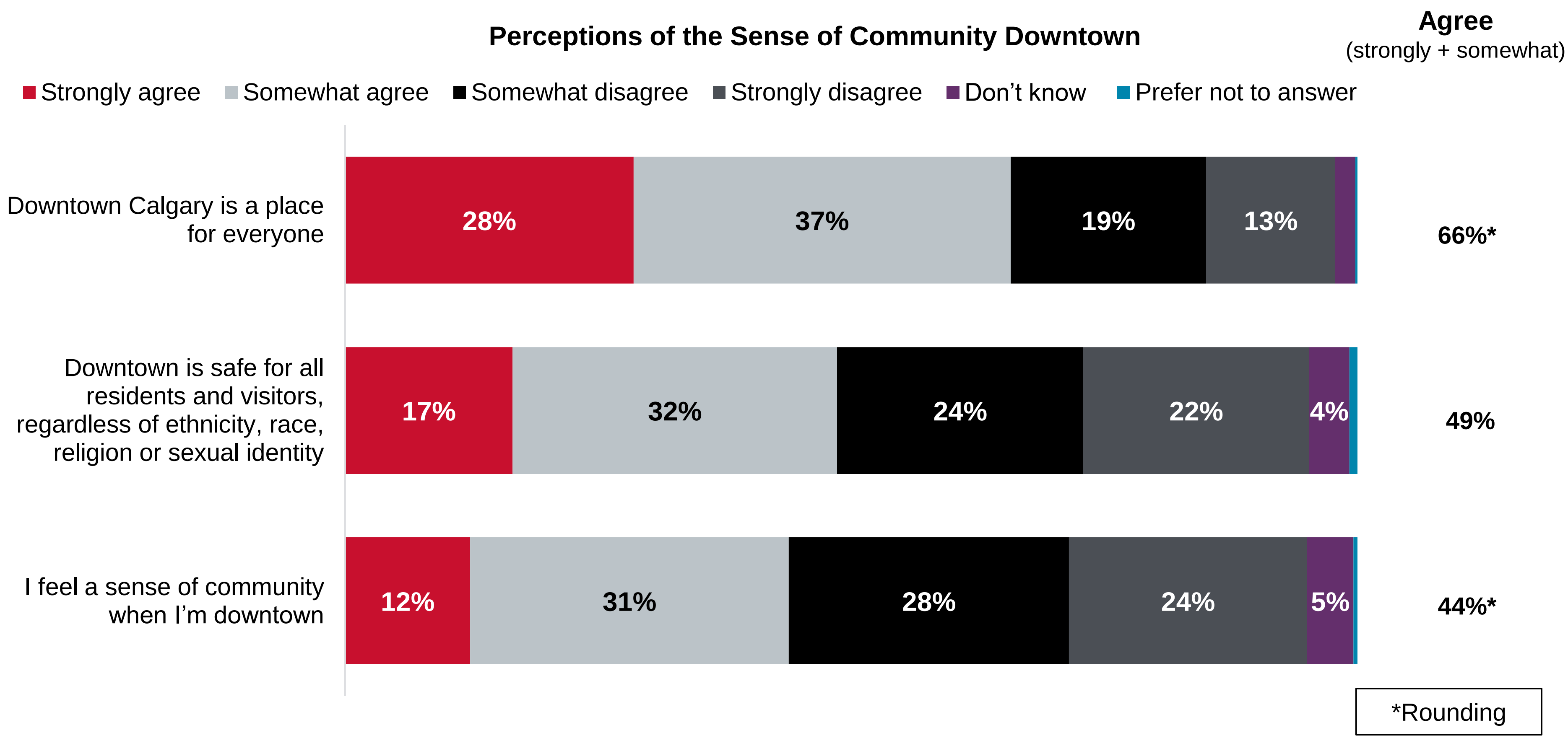
Sense of Community and Safety

Safety concerns influence the decision to spend leisure time downtown for half of respondents.

- Approximately half (52%) of respondents indicate that safety concerns have some degree of influence on their decision to visit downtown Calgary in their leisure time, including two-in-ten (22%) who indicate safety concerns have a 'great deal of influence' on their decision to visit downtown.
  - Females are more likely to indicate that safety concerns influence their downtown leisure visitation choices (59% vs. 46% of males).

Sense of Community in Calgary's Downtown

While two-thirds (66%) of respondents indicate that downtown is a place for everyone, only half (49%) agree it is safe for all visitors, and fewer feel a sense of community when downtown (44%).

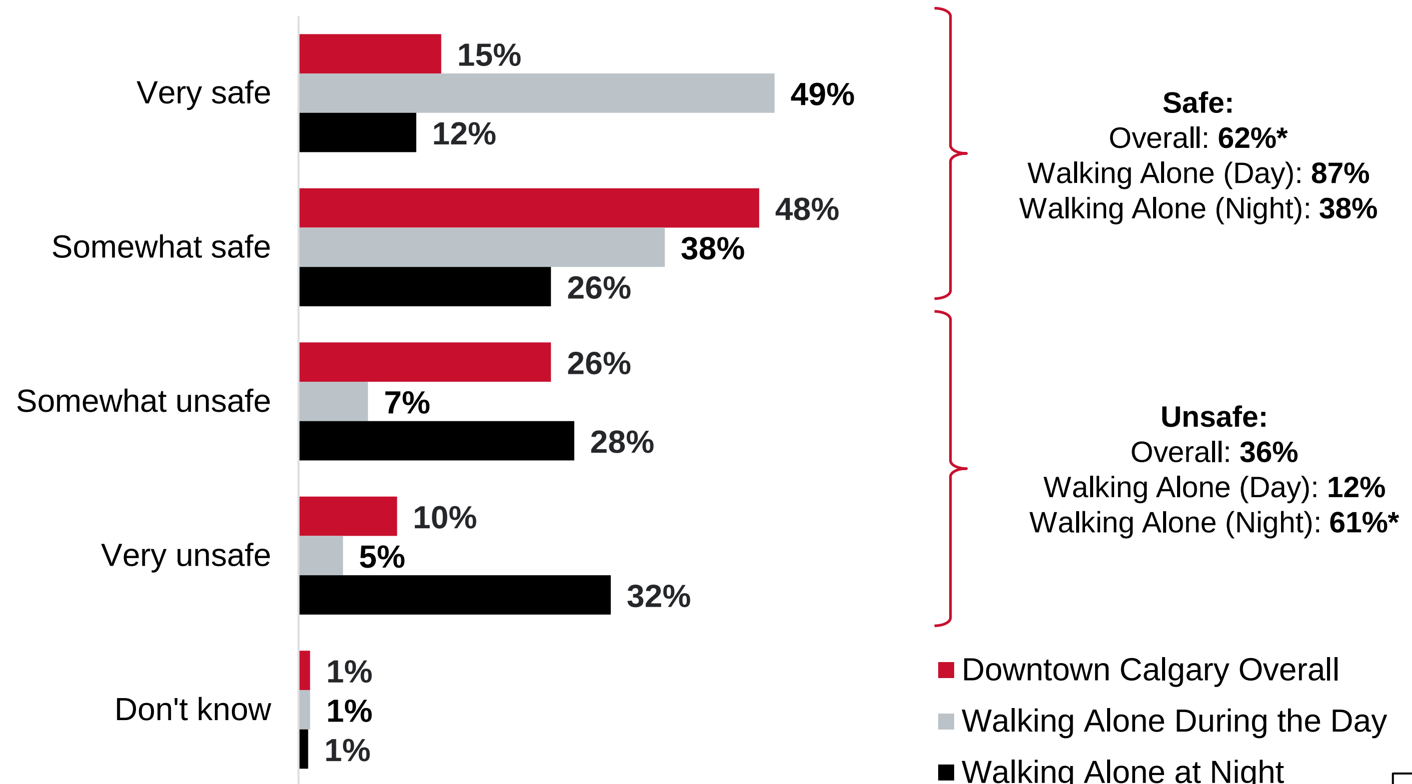


Q: To what extent do you agree or disagree with the following statements about Calgary's downtown:
Base: Respondents who live outside of downtown (n=502)

Downtown Safety

Overall, about three-in-five (62%) of respondents report Calgary's downtown is safe overall and a large majority feel safe while walking alone during the day (87%). However, less than two-in-five (38%) feel safe walking alone at night while downtown.

Perception of Safety in Downtown Calgary

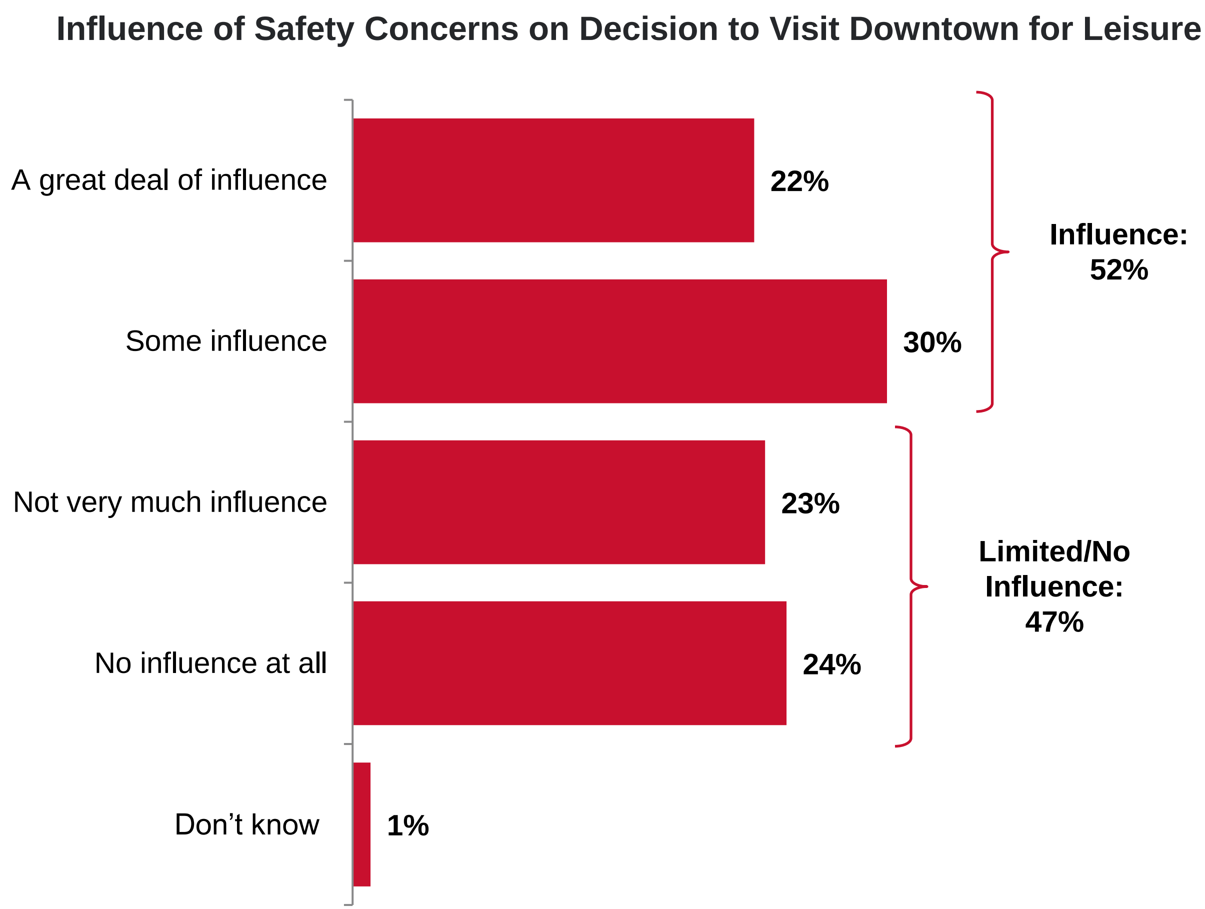


*Rounding

Q: How safe or unsafe do you think Calgary's downtown is overall? / How safe do you feel or would you feel walking alone downtown during the day? / . . . at night?
Base: Respondents who live outside of downtown (n=502)

Influence of Safety on Downtown Leisure Visits

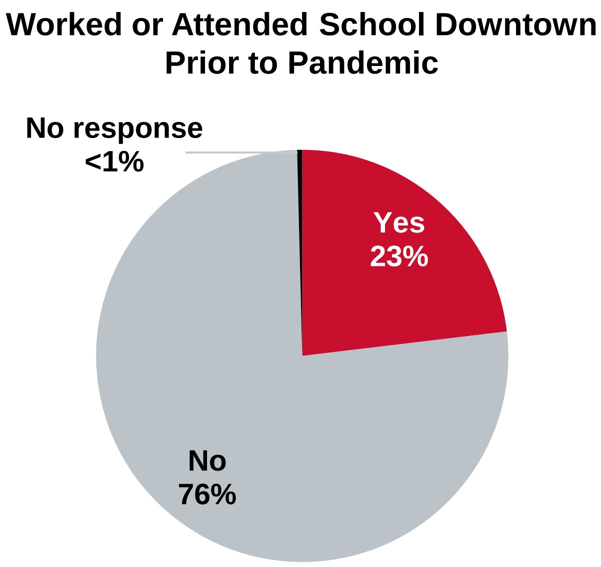
Safety concerns have an influence on visiting downtown for half of respondents (52%).

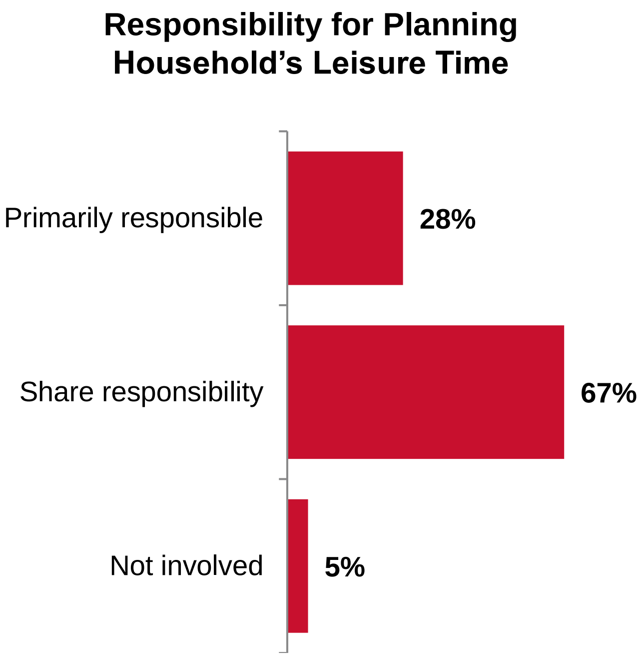


Q: How much of an influence do safety concerns have on your decision to visit downtown for leisure?
Base: Respondents who live outside of downtown (n=502)

Demographics

Demographics



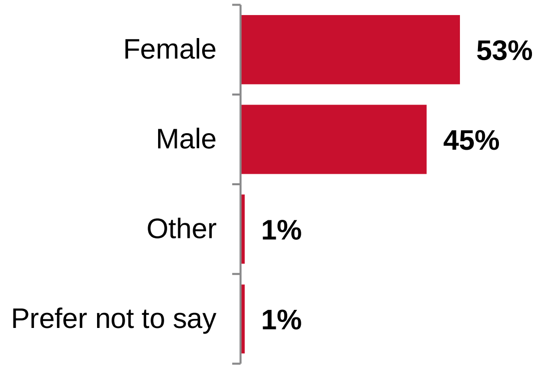


Base: Respondents who live outside of downtown (n=502), unless otherwise specified

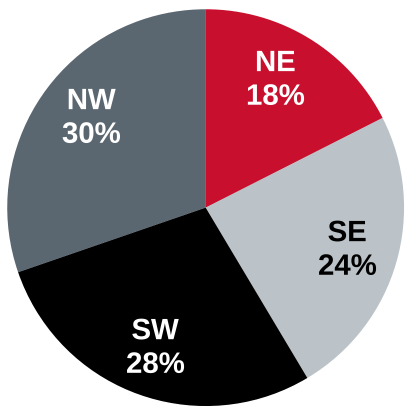
NOTE: Totals may not add to 100% due to rounding

Demographics (cont'd)

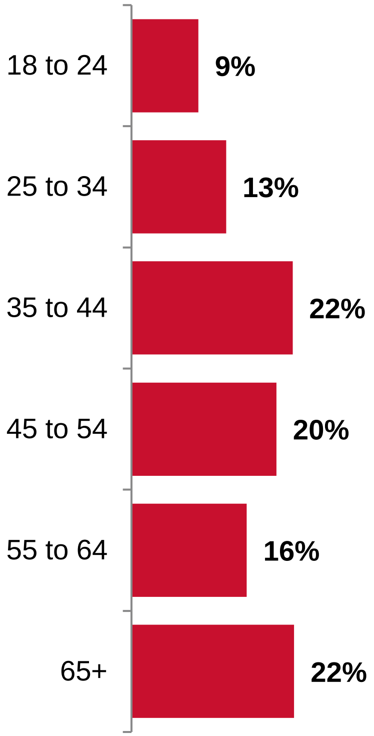
Gender
(asked, not inferred)



Quadrant of Residence



Age

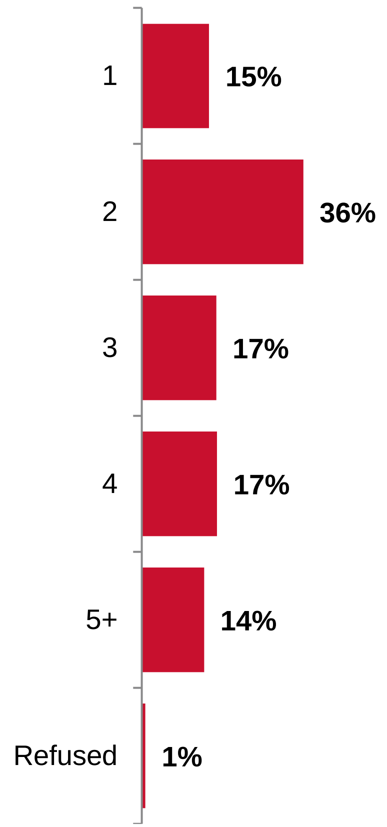


Base: Respondents who live outside of downtown (n=502), unless otherwise specified

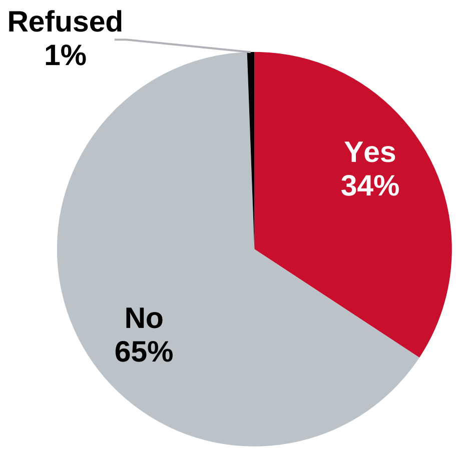
NOTE: Totals may not add to 100% due to rounding

Demographics (cont'd)

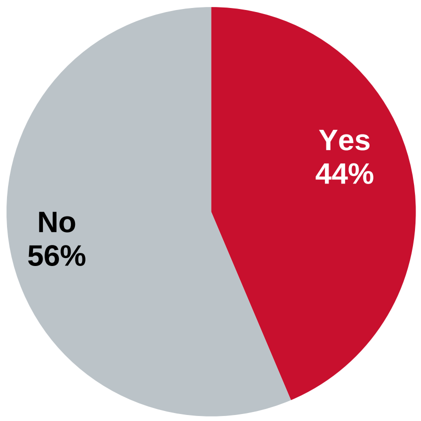
Household Size



Children Under the Age of 18 in the Household



Senior (aged 65+ years) in the Household

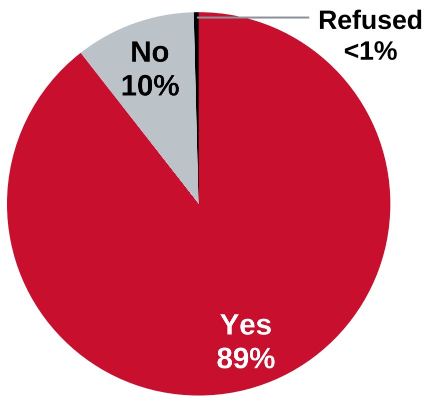


Base: Respondents who live outside of downtown (n=502), unless otherwise specified

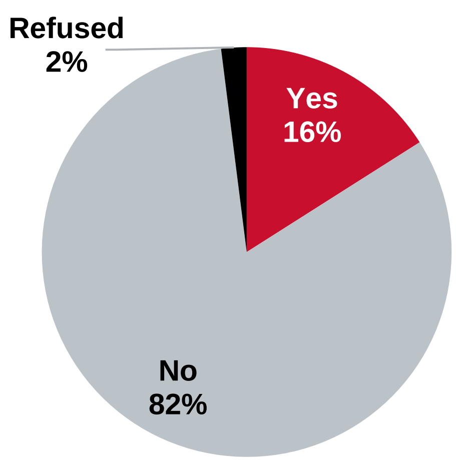
NOTE: Totals may not add to 100% due to rounding

Demographics (cont'd)

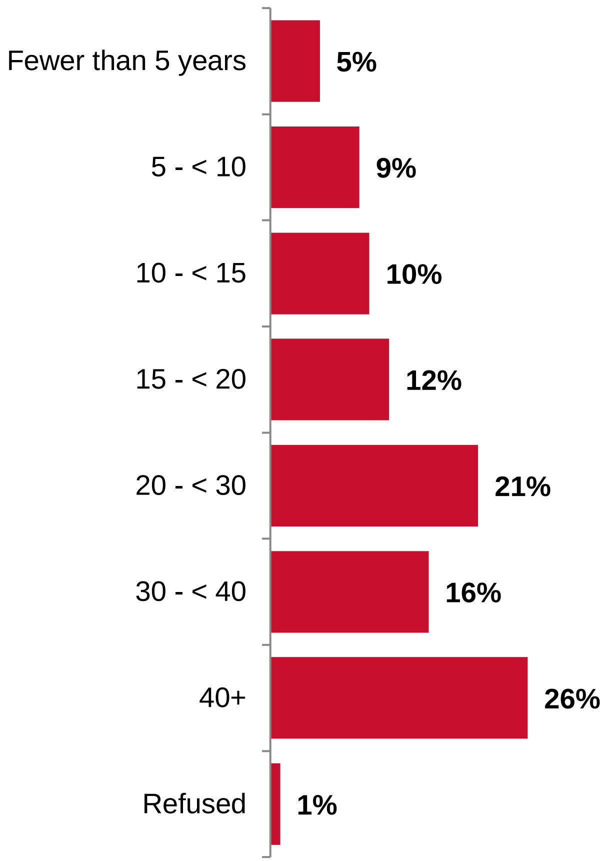
Primarily or Jointly Responsible for Paying Taxes or Rent in Household



Self-reported Disability (Respondent or Family Member)



Years Lived in Calgary

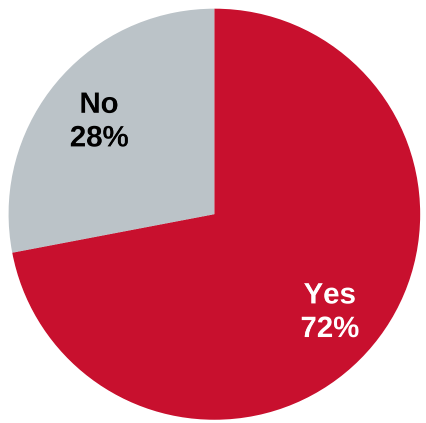


Base: Respondents who live outside of downtown (n=502), unless otherwise specified

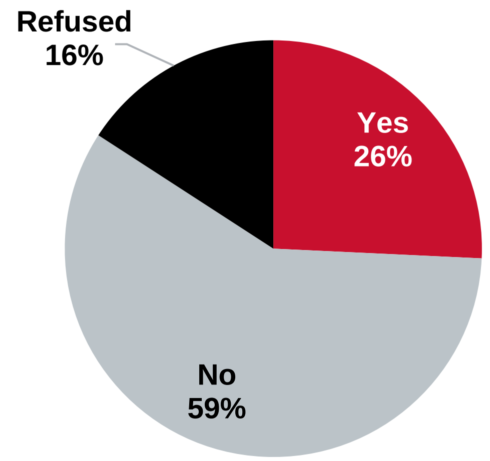
NOTE: Totals may not add to 100% due to rounding

Demographics (cont'd)

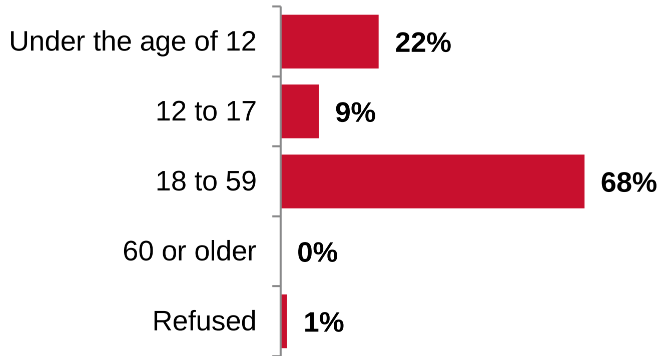
Born in Canada



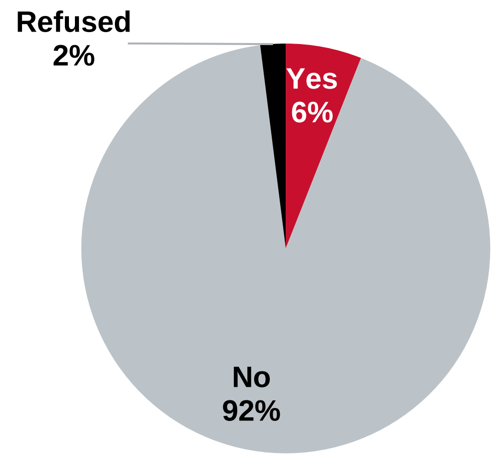
Racialized



Age Upon Arrival in Canada
(among those not born in Canada, n=141)



Indigenous

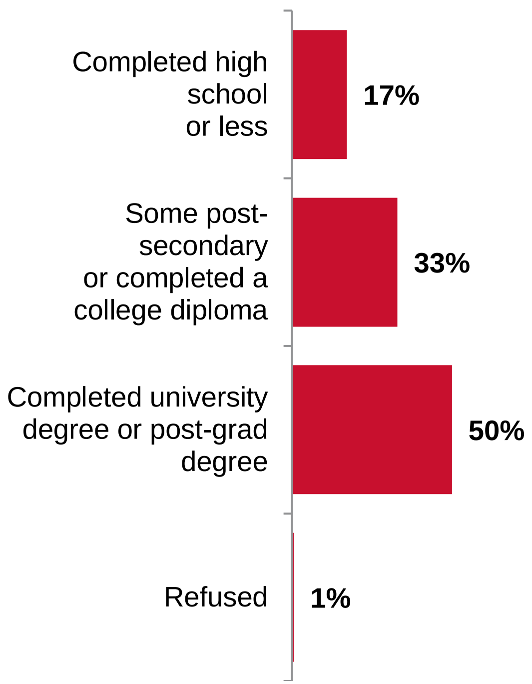


Base: Respondents who live outside of downtown (n=502), unless otherwise specified

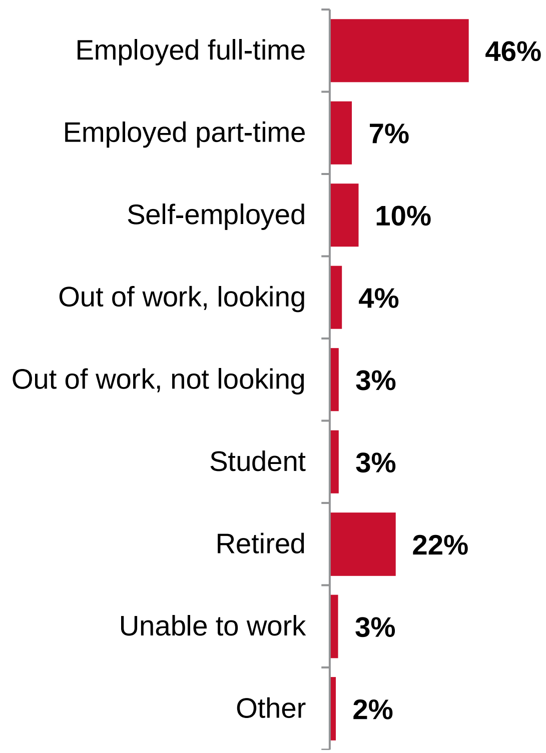
NOTE: Totals may not add to 100% due to rounding

Demographics (cont'd)

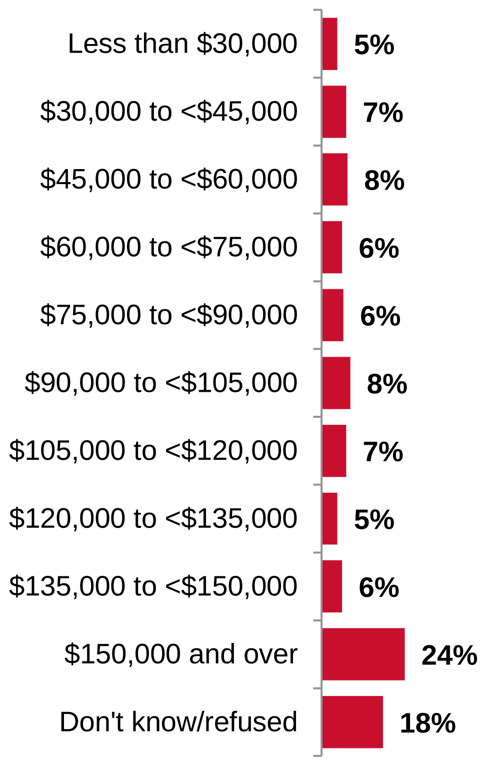
Highest Level of Schooling Obtained



Employment Status



Household Income



Base: Respondents who live outside of downtown (n=502), unless otherwise specified

NOTE: Totals may not add to 100% due to rounding

Questionnaire

Questionnaire

The City of Calgary Citizen Perspectives Survey – Greater Downtown Survey
December 8, 2021

INTRODUCTION
Hello, my name is ________________. I'm calling from Leger, a national public opinion research company. I am not selling anything. The City of Calgary has commissioned us to conduct a survey to understand your opinions about downtown Calgary.

(INTERVIEWER NOTE: IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "Downtown Survey." City staff would be happy to address your concerns.)

The survey will take approximately 15 minutes depending on your answers. Before we begin I have a few questions about you.

PREQ.
I want to let you know that the personal information collected in this survey is done so under the authority of the Freedom of Information and Protection of Privacy Act, Section 33(c) and is used to provide guidance to The City of Calgary when it comes to making decisions regarding municipal matters. If you have questions about the collection or use of your information, please contact a City of Calgary Research Coordinator at 403-268-2798 and specifically mention the "Downtown Survey" or send a letter to "Research Coordinator, The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5."

S1. Are you 18 years of age or older?

1. Yes **[CONTINUE]**
2. No, May I please speak with someone who is? **[REPEAT INTRODUCTION]**
3. No, not qualified / available **[THANK & TERMINATE]**

[TRACK GENDER QUOTAS WITHIN QUADRANTS – BASED ON S3 AND S4]

S3. Record Gender **(DO NOT ASK)**
Male
Female

S4. And which of the following age groups do you belong to? Just stop me when I get to your age group.

1. 18 to 19 yrs
2. 20 to 24 yrs
3. 25 to 34 yrs
4. 35 to 44 yrs
5. 45 to 54 yrs
6. 55 to 64 yrs
7. 65 to 74 yrs
8. 75 and older
9. Refused **[DO NOT READ]**

[TRACK AGE QUOTAS WITHIN QUADRANTS/GENDER – BASED ON S5, S3 AND S4]
Male 18 to 34
Male 35 to 54
Male 55 Plus
Female 18 to 34
Female 35 to 54
Female 55 Plus

S5. Can you tell me which quadrant of the city you live in? **(WAIT FOR RESPONSE – READ LIST TO CLARIFY IF NEEDED)**
1. Southwest
2. Southeast
3. Northwest
4. Northeast

[If outside of Calgary go to End]

<u>LIVE/WORK DOWNTOWN</u>

As you may or may not be aware, Calgary's Greater Downtown includes the downtown core, the Beltline, East Village, Chinatown, Eau Claire and Downtown West.

(**INTERVIEWER NOTE:** IF ASKED FOR SPECIFIC STREETS THAT DEFINE THE BOUNDARY OF CENTRE CITY AREA: Calgary's downtown area is bounded by the Bow River and Prince's Island Park to the north; the Elbow River, including Fort Calgary, the Saddledome and Stampede Grounds to the east; 17th Avenue to the south; and, 14th Street to the west.)

Q1. Based on this definition, do you live downtown?

Yes **[TERMINATE]**
No
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q2. In the year prior to the beginning of the pandemic, did you work or attend school downtown?

Yes
No
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q3. How often do you think you will work or attend school downtown in the first six months of 2022? **[INTERVIEWER NOTE:** STOP READING WHEN YOU REACH THE RESPONDENT'S CATEGORY**]**

Never

Questionnaire (cont'd)

Less often than once a month
Once a month
Once every 2 or 3 weeks
Once a week
2 to 4 days per week
5 to 7 days per week
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

VISITATION PATTERNS / INTENTIONS

In this survey, I am going to ask you about your visits to downtown Calgary for leisure purposes. Leisure is defined as free time used for enjoyment, such as dining, shopping, recreation or entertainment. This does not include work or personal appointments such as medical visits or downtown visits out of convenience from already being there, such as going shopping or to a restaurant or bar after work.

Q4. In a typical year, prior to the beginning of the pandemic, how often did you visit downtown for leisure purposes? [INTERVIEWER NOTE: STOP READING WHEN YOU REACH THE RESPONDENT'S CATEGORY]

Never
Less often than once a month
Once a month
Once every 2 or 3 weeks
Once a week
2 to 4 days per week
5 to 7 days per week
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q5. In the first six months of 2022, how often do you think you will visit Calgary's downtown for leisure purposes?

Never
Less often than once a month
Once a month
Once every 2 or 3 weeks
Once a week
2 to 4 days per week
5 to 7 days per week
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

DOWNTOWN ACTIVITES / MOTIVATIONS TO VISIT

Q6. Overall, how desirable is Calgary's downtown as a destination for your leisure time?

Very desirable
Somewhat desirable
Not very desirable
Not at all desirable
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q7. Keeping in mind that Calgary's Greater Downtown includes the downtown core, the Beltline, East Village, Chinatown, Eau Claire and Downtown West, what images come to mind when you think of a leisure visit to downtown Calgary? Anything else?

[OPEN END – ACCEPT UP TO THREE RESPONSES]

DO NOT ASK Q8-Q11 IF 'NEVER' AT Q5

Q8. To what extent do you agree or disagree that the following are reasons you would choose to go downtown in the coming year?

[RANDOMIZE]
To meet new people
To get away from your daily routine
To experience the excitement of a bustling, cosmopolitan atmosphere
To be entertained / have fun
To see or do something new or different
To relax and recharge
To spend time with friends and family
To be active
To learn something
To enjoy the arts and culture scene

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q9. I am going to read you a list of types of activities that people may do downtown. Please tell me how likely or unlikely you are to participate in each activity downtown in the coming year.

[RANDOMIZE]
Visit museums or art galleries
Attend live theatre or concerts
Go to nightclubs or bars
Engage in indoor or outdoor fitness activities
Go shopping

Questionnaire (cont'd)

Dine in restaurants
Visit a casino
Visit a library
Go to a spa
Visit a plaza or park
Go to a movie
Go sightseeing
[NEXT TWO OPTIONS MUST BE ASKED TOGETHER]
Attend a festival or event, not including sporting events
Attend a sporting event as a spectator

Very likely
Somewhat likely
Not very likely
Not at all likely
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q10. Now, I'm going to read a list of locations in downtown Calgary. For each one, please tell me how likely or unlikely you are to visit each location in the coming year for leisure.

[RANDOMIZE]
Stephen Avenue
Olympic Plaza
Chinatown
Eau Claire Market area
Prince's Island Park
East Village, including the River Walk and St. George's Island

Very likely
Somewhat likely
Not very likely
Not at all likely
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q11. To what extent do you agree or disagree with the following statements?

[RANDOMIZE]
I love going downtown because of the variety of dining options
My leisure trips downtown are usually based on festivals and events in the area
I prefer shopping downtown to shopping elsewhere
I like sticking to familiar places downtown, so I feel safe and comfortable
There is nothing for kids to do downtown
Calgary's arts and culture scene has a big influence on my trips downtown
There are enough benches and seating downtown for my needs
There are enough public washrooms available downtown
I tend to stick to one area when I'm downtown because it's too difficult to get from place to place

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Not applicable
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

[ASK ALL]
Q12. To what extent do you agree or disagree that the lingering COVID-19 pandemic makes me hesitant to go downtown

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Not applicable
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q13. What, if any, features or amenities are missing from downtown that prevent you from planning to visit more often or staying longer?

[OPEN END]

PARKING

Q14. In a typical year, prior to the beginning of the pandemic, did you ever drive downtown for leisure purposes?

Yes
No **[SKIP TO Q16]**
Don't know **[DO NOT READ, SKIP TO Q16]**
Prefer not to answer **[DO NOT READ, SKIP TO Q16]**

Q15. For each of the following statements please tell me the extent to which you agree or disagree:

[RANDOMIZE]
When I drive downtown, parking is difficult because I don't know where to park
I don't drive downtown because parking is too expensive
The availability of parking downtown meets my needs
Travel time to get downtown from where I live is reasonable

Strongly agree
Somewhat agree

Questionnaire (cont'd)

Somewhat disagree
Strongly disagree
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

INCLUSION & SAFETY

Q16. To what extent do you agree or disagree with the following statements about Calgary's downtown:

[RANDOMIZE]
I feel a sense of community when I'm downtown
Downtown Calgary is a place for everyone
Downtown is safe for all residents and visitors, regardless of ethnicity, race, religion or sexual identity

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q17. How safe or unsafe do you think Calgary's downtown is overall?

Very safe
Somewhat safe
Somewhat unsafe
Very unsafe
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q18. How safe do you feel or would you feel walking alone downtown during the day? Do you or would you feel…

Very safe
Reasonably safe
Somewhat unsafe
Very unsafe
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q19. And, how safe do you feel or would you feel walking alone downtown after dark? Do you or would you feel…

Very safe
Reasonably safe

Somewhat unsafe
Very unsafe
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

Q20. How much of an influence do safety concerns have on your decision to visit downtown for leisure?

A great deal of influence
Some influence
Not very much influence
No influence at all
Don't know **[DO NOT READ]**
Prefer not to answer **[DO NOT READ]**

DEMOGRAPHICS

And finally I have a few questions that will be used to help us classify responses.

DQ1. How many people, including yourself, live in your household?

RECORD NUMBER (RANGE 1 – 10)
Refused **[DO NOT READ]**

[IF 2 OR MORE IN DQ1 ASK DQ2 AND DQ3 AND NEW QUESTION, ELSE SKIP TO DQ4]
DQ2. Do you have any children under the age of 18 living in your household?

Yes
No
Refused **[DO NOT READ]**

DQ3. Is there anyone aged 65 years or older living in your household?
[PROGRAMMER: IF RESPONDENT IS 65 OR OLDER, PREFACE QUESTION WITH "BESIDES YOURSELF"]

Yes
No
Refused **[DO NOT READ]**

NEW QUESTION: Which of the following statements best describes your involvement in your household's leisure plans?

I am primarily responsible for planning my household's leisure time
I share responsibility for planning my household's leisure time
I am not involved in planning my household's leisure time
Refused **[DO NOT READ]**

Questionnaire (cont'd)

[ASK ALL]
DQ4. Are you either primarily or jointly responsible for paying property taxes or rent in your household?
(**INTERVIEWER NOTE:** If people are partially responsible for paying rent then select "Yes".)

Yes
No
Refused

DQ19. How many years have you lived in Calgary? **(IF LESS THAN 1 YEAR ENTER 0)**

RECORD NUMBER (RANGE 1 – 105)

DQ8. We want to ensure our research is reflective of all Calgarians. Were you born in Canada?

Yes
No
Refused **[DO NOT READ]**

[IF YES OR DK/REF, SKIP TO DQ10, ELSE CONTINUE WITH DQ9]

DQ9. How old were you when you arrived in Canada? **(READ LIST)**

Under the age of 12
12 to 17
18 to 59
60 or older
Refused **[DO NOT READ]**

DQ12. What is the highest level of schooling that you have obtained? **(READ LIST)**

Did not complete high school
Completed high school
Some post secondary or completed a college diploma
Completed university degree or post-grad degree
Refused **[DO NOT READ]**

DQ_EMP. What best describes your employment status? Would you say you are…
Employed full time
Employed part time
Self-employed
Not working and looking for work
Not working and not currently looking for work
A student
Retired
Unable to work

Other
Refused **[DO NOT READ]**

DQ13. Which of the following categories best describes the total annual income, before taxes, of all the members of your household? Please stop me when I get to your category.
(READ LIST – ACCEPT RESPONSE BEFORE FINISHING LIST)

Less than $90,000
$90,000 and over
[DO NOT READ] Don't Know/Refused

[IF "Less than $90,000" ASK DQ14. IF "$90,000 and over" ASK DQ15. IF DK/REF, GO TO DQ17]

DQ14. Would that be… **(READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)**

Less than $30,000
$30,000 to just under $45,000
$45,000 to just under $60,000
$60,000 to just under $75,000
$75,000 to just under $90,000

DQ15. Would that be… **(READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)**

$90,000 to just under $105,000
$105,000 to just under $120,000
$120,000 to just under $135,000
$135,000 to just under $150,000
$150,000 and over

DQ17. Do you consider yourself a racialized person?

Yes
No
Refused **[DO NOT READ]**

DQ16. Do you consider yourself an Indigenous person?

Yes
No
Refused **[DO NOT READ]**

DQ17. Do you or a member of your household have a disability?

DO NOT READ LIST
Yes – myself
Yes – someone in my household
No

Questionnaire (cont'd)

Refused / prefer not to say

DQ23. What is your gender?

IF NECESSARY - DO NOT READ EXCEPT TO CLARIFY: Gender refers to the gender that a person internally feels and/or the gender a person publicly expresses in their daily life, including at work, while shopping, or accessing other services, in their home or in the broader community.

DO NOT READ LIST EXCEPT TO CLARIFY
Male
Female
Other – please specify
Refused / prefer not to say

DQ18. Finally, The City of Calgary conducts citizen research year round to help better understand the needs and perspectives of Calgarians. Would you be interested in participating in future City research projects?

Yes
No
Don't know

[IF "YES" ASK NEXT, ELSE SKIP TO CLOSE]

DQ19A. Could I please have an email address where we can contact you?

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT.]

DQ19B. Could I please have your first name and confirm your telephone number?

[RECORD FIRST NAME AND CONFIRM TELEPHONE NUMBER]

DQ18C. Is this phone number a cell phone or a landline?

Cell phone
Landline
Prefer not to answer **[DO NOT READ]**

This completes the survey. Thank you very much for taking the time to provide feedback.

Contact

The Corporate Research Team
Customer Service & Communications
The City of Calgary
research@Calgary.ca