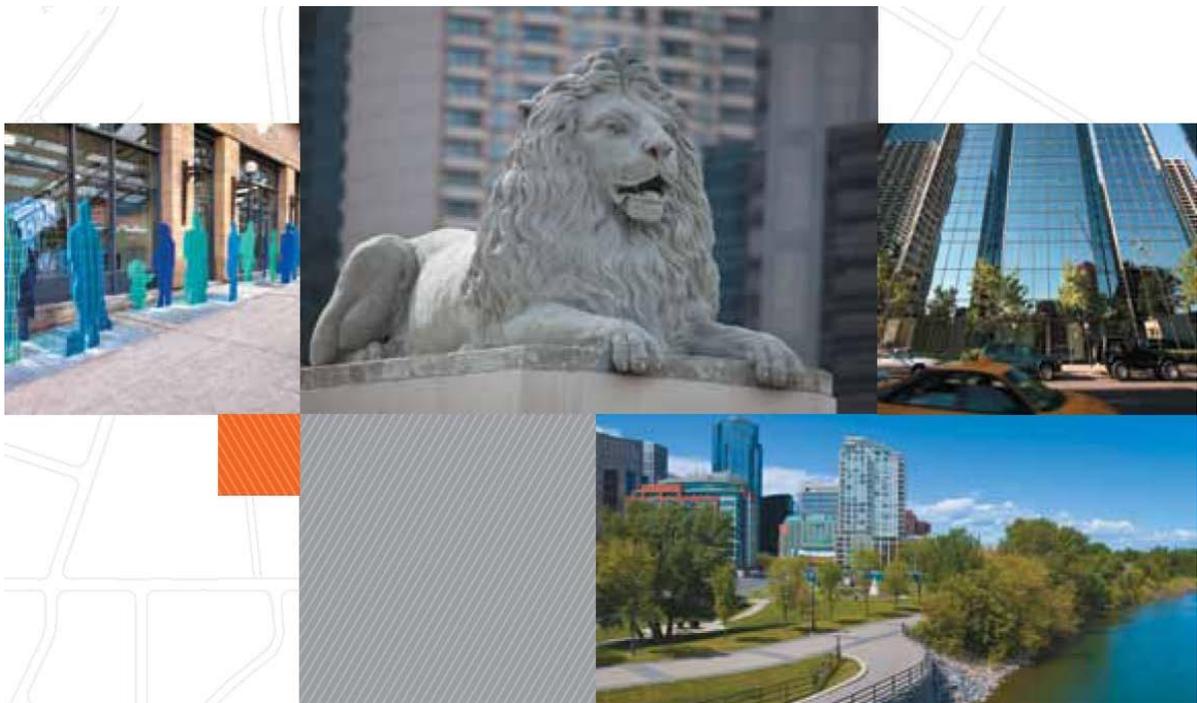


The City of Calgary 2013 Centre City Citizen Perception Survey Key Findings Summary



Planning, Development & Assessment
The City of Calgary
Survey conducted by Ipsos Reid

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Onward! A vibrant city depends on a vibrant centre.



BACKGROUND AND METHODOLOGY

Survey Background

Ten core neighbourhoods comprised of Chinatown, Connaught Centre, Downtown, East Victoria Crossing, East Village, Eau Claire, Stampede Park, Victoria Crossing Centre, West Connaught and the West End make up the heart of the city of Calgary and collectively encompass the target neighbourhoods for the Centre City Plan. The Centre City Plan is a comprehensive and strategic long term vision for the future of Calgary's Centre City. Approved by City Council in 2007 it outlines a vision for creating a Centre City that is a liveable, thriving and caring place.

The City of Calgary's Centre City Plan vision is to make Centre City a place for business (right now more than 161,500 Calgarians work in the Centre City sector) and to develop it into an urban living environment encompassing arts, culture, recreation, tourism and entertainment.

To do this, plans have been implemented to enhance safety; improve transportation and enhance the quality of life and beautify the area through the redevelopment of parks and the enlargement of green spaces. Certainly, the expected increase in Centre City residents in the next decade, up as much as 50% from 35,843 (2011) implies that this holistic vision for the heart of Calgary is being realized.

The need to develop solid benchmarks based on citizen views and perceptions is essential to ensuring the Centre City Plan is executed successfully. This was achieved in 2009 and 2011 in partnership with Ipsos Reid. Planning, Development & Assessment re-engaged citizens in 2013 to assess progress against the established benchmarks.

Survey Objectives

The overarching objective of this research is to better understand the various opinions of stakeholders regarding the Centre City. Other objectives include:

- To effectively gauge the opinions and perceptions Calgarians have about the Centre City region (through a clear and statistically valid implementation);
- To develop a solid series of measurements against previously established benchmarks across a variety of key areas; and,
- To generate value information for City of Calgary business units which deliver programs/services either specific to, or within the Centre City region.

The Centre City



Centre City Plan 2007

Survey Methodology

A telephone survey was conducted with a randomly selected sample of 1,000 Calgarians aged 18 years and older between October 29th and November 18th, 2013.

Sampling quotas were established to ensure that a large enough representation of individuals living in three key target groups was interviewed. Those groups include:

Sampling Quota#1 – Residents who live in the Centre City: A total of 336 telephone interviews were conducted with residents of the Centre City. Residents will live within the following FSA's: T3C, T2R, T2P, and T2G.

Sampling Quota#2 – Residents who work in the Centre and live elsewhere in Calgary: A total of 333 interviews were conducted with residents who work in the Centre and live elsewhere in Calgary.

Sampling Quota#3 – Residents who neither work nor live in the Centre City: A total of 334 interviews were conducted with residents who neither work nor live in the Centre City.

The margin of error for the total sample of 1,000 is ± 3.1 percentage points, nineteen times out of twenty.

The final data were weighted to ensure the overall sample's quadrant and age/gender composition reflects that of the actual Calgary population aged 18 or older according to Municipal Census data and the actual distribution of residents throughout the three geographic quota areas sampled.

The final weighted sample by key target group is as follows:

Residents who live in the Centre City: 13% of the weighted sample

Residents who work in the Centre and live elsewhere in Calgary: 25% of the weighted sample

Residents who neither work nor live in the Centre City: 62% of the weighted sample

KEY FINDINGS

Over the last 5 years survey findings continue to demonstrate that great strides have been made in building a safer, cleaner and more vibrant Centre City. The City of Calgary's investment in the Centre City since 2007 has created a more attractive core which has a greater capacity to support and encourage future investment and growth.

Changes from 2011 Survey: The results of the 2013 survey are very consistent with the 2011 survey with overall measurements continuing to show improvement and/or remaining stable. Of particular note, the 2013 survey results indicate shifting perceptions among those *who live and work elsewhere* in Calgary: They are visiting the Centre City more frequently so their views are now based on current facts, not past experiences.

- Significantly more Calgarians are visiting the Centre City on a monthly or more basis to shop, eat lunch or dinner.
- Centre City residents are shifting modes of transport.
- Calgarians are making less use of personal vehicles within the Centre City.
- Calgarians report higher satisfaction with Centre City C-Train stations, roads and sidewalks.
- Calgarians who live out/work in the Centre City report lower satisfaction with Centre City CPR Underpasses.
- Calgarians report higher satisfaction with the cleanliness of C-Train stations, sidewalks and bus stops in the Centre City.
- Among residents who live out/work out of Centre City, cleanliness ratings dramatically increased for Centre City C-Train stations, bus stops, sidewalks, roads and CPR Underpasses.
- Calgarians are more likely to say that Centre City cleanliness has stayed the same in the last 12 months.
- Centre City residents are less likely to say that Centre City cleanliness is improving.
- Calgarians continue to perceive safety in doing six activities alone in the Centre City between 8 am and 5 pm as very safe or reasonably safe.
- Since 2011, Centre City safety ratings (very safe or reasonably safe) have increased by a statistically significant amount for five activities for the 5 pm to 10 pm timeframe.
- Calgarians are more likely to say that Centre City safety has stayed the same in the last 12 months.
- Centre City residents aren't quite the newcomers to Calgary as they were in the previous survey.
- Centre City residents continue to say that they are likely to remain living in the area for at least the next three years.
- Centre City residents continue to say that they are likely to remain living in the area for at least the next three years.
- Residents living outside of the Centre City continue to report that it is not likely that they will move into the Centre City in the next three years.
- Centre City residents enjoy living in their community and actively engage in multiple activities within the Centre City.

- Even those who do not live in the Centre City are spending more time taking part in activities and contributing to a vibrant core.
- Among all Calgarians there is near universal agreement of pride to be a Calgarian, pride in one’s own neighbourhood and of the importance of community.
- Calgarians are significantly more likely to state that the Centre City is a desirable place for me to live.

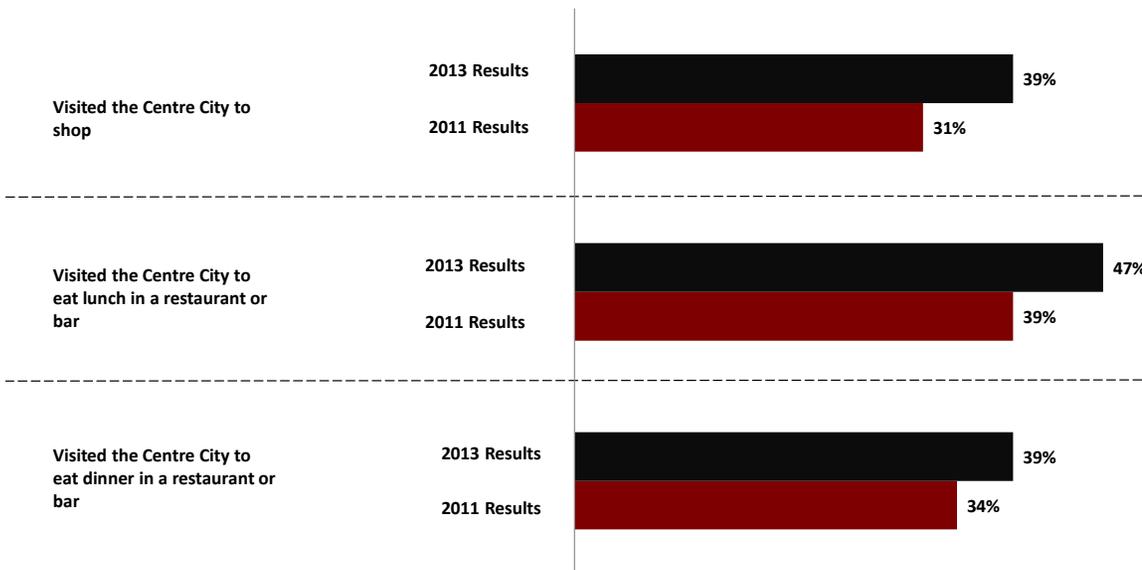
Visitation Patterns

Significantly more Calgarians are visiting the Centre City on a monthly or more basis to shop, eat lunch or dinner.

- Among all Calgarians, there is an increase over 2011 in monthly or more visits to Centre City to shop (from 31% to 39%) and to eat lunch (from 39% to 47%) or dinner (from 34% to 42%) in a restaurant/bar.
- Notable is the increase among residents who live out/work out of the Centre City. Monthly or more visits are up for eating lunch (from 19% to 31%) or dinner (from 22% to 31%) in a Centre City restaurant/bar and for shopping in the Centre City (from 15% to 25%).



Visitation Patterns – Monthly Visits or More Often



Q4. Approximately how often have you done each of the following, in the past 12 months?

Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

Transportation Patterns

Centre City residents are shifting modes of transport

- For Centre City residents, use of the LRT as a primary travel mode from the Centre City to other locations in Calgary has risen by 8% (from 23% to 31%) since 2011. Since 2009, use of the LRT for this purpose has increased a total of 18%.
- There is a significant 10% decrease in the use of personal cars by Centre City residents within the Centre City boundaries (from 36% to 26%) and a 10% increase in walking/running (from 31% to 41%). Walking/running continues to be the preferred travel mode for Centre City residents within the Centre City.

Calgarians are making less use of personal vehicles within the Centre City.

- Among all Calgarians, the use of a personal vehicle as the primary form of transportation within Centre City has decreased by 5% from 2011 (from 51% to 46%). Meanwhile, LRT usage has increased by 4 % (from 15% to 19%).
- These overall changes are largely driven by Calgarians who live out/work out of Centre City, as their use of LRT is up 7% (from 15% to 22%) and Centre City residents whose use of personal vehicles has decreased by 10% (from 36% to 26%).



Primary Mode of Transportation – Within the Centre City

AMONG ALL CALGARIANS



2013

46%

19%

2011

51%

15%

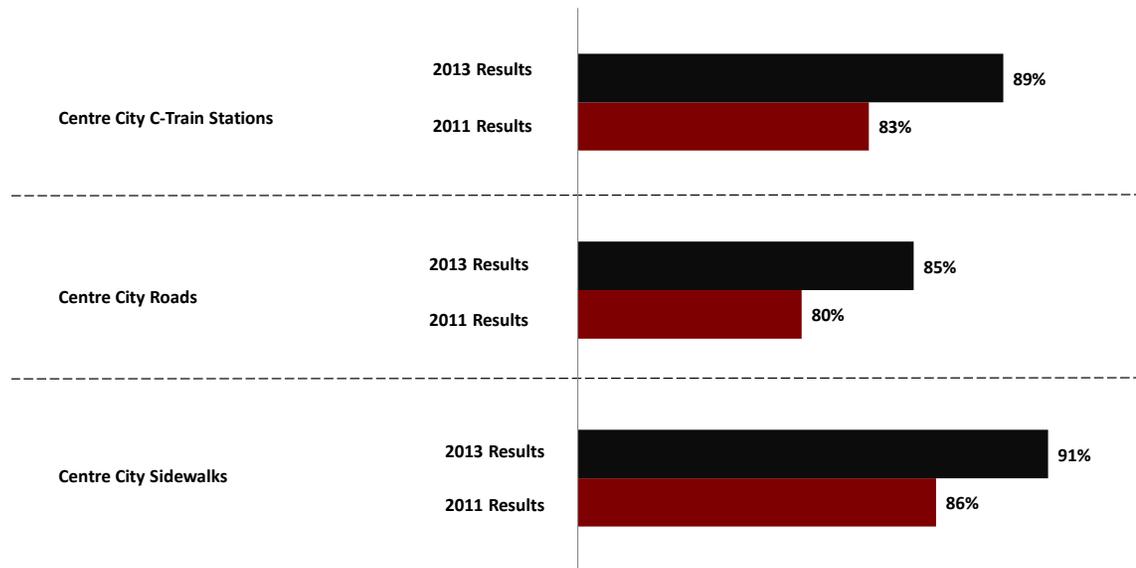
Overall Satisfaction with Key Centre City Infrastructure

Calgarians report higher satisfaction with Centre City C-Train stations, roads and sidewalks.

- Among all Calgarians, satisfaction with C-train stations has increased by 6% (83% to 89%), satisfaction with roads and sidewalks has increased by 5% (from 80% to 85% and 86% to 91% respectively).



Overall Satisfaction with Key Centre City Infrastructure



Q5b. Thinking about the same pieces of infrastructure, please indicate how satisfied you are with each. Would you say you are very satisfied, somewhat satisfied, not very satisfied or not at all satisfied?

Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

The City of Calgary – Centre City Implementation (CCI) Citizen Perception Survey

Calgarians who live out/work in the Centre City report lower satisfaction with Centre City CPR Underpasses.

- Among Calgarians who live out/work in the Centre City, satisfaction with Centre City CPR underpasses has fallen 14% since 2011, (from 69% to 55%).

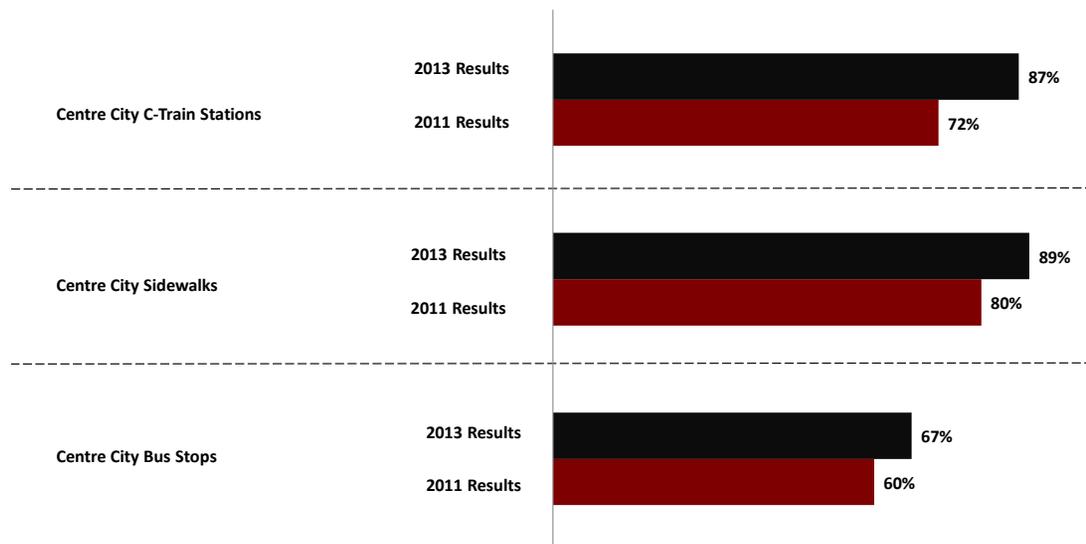
Overall Satisfaction with the Cleanliness of Key Centre City Infrastructure

Calgarians report higher satisfaction with the cleanliness of C-Train stations, sidewalks and bus stops in the Centre City.

- Satisfaction ratings for three items have changed by a statistically significant amount since 2011. Satisfaction with cleanliness has increased by 15% for Centre City C-Train stations (from 72% to 87%), by 9% for sidewalks (from 80% to 89%) and by 7% for bus stops (60% to 67%).



Overall Satisfaction With The Cleanliness of Key Centre City Infrastructure



Q7B. Thinking about the same Centre City areas, please rate the level of cleanliness of each. Would you say ... is very clean, reasonably clean, somewhat dirty or very dirty?

Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

The City of Calgary – Centre City Implementation (CCI) Citizen Perception Survey

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- These changes are largely driven by Calgarians who live out/work out of Centre City and report a 21% increase in satisfaction with C-Train stations (from 67% to 88%), 9% for bus stops (from 58% to 67%) and 12% for sidewalks (from 79% to 91%).
- The lowest satisfaction ratings are generally consistent across all 3 target groups with underpasses, bus stops and on-street bike routes holding the bottom positions.

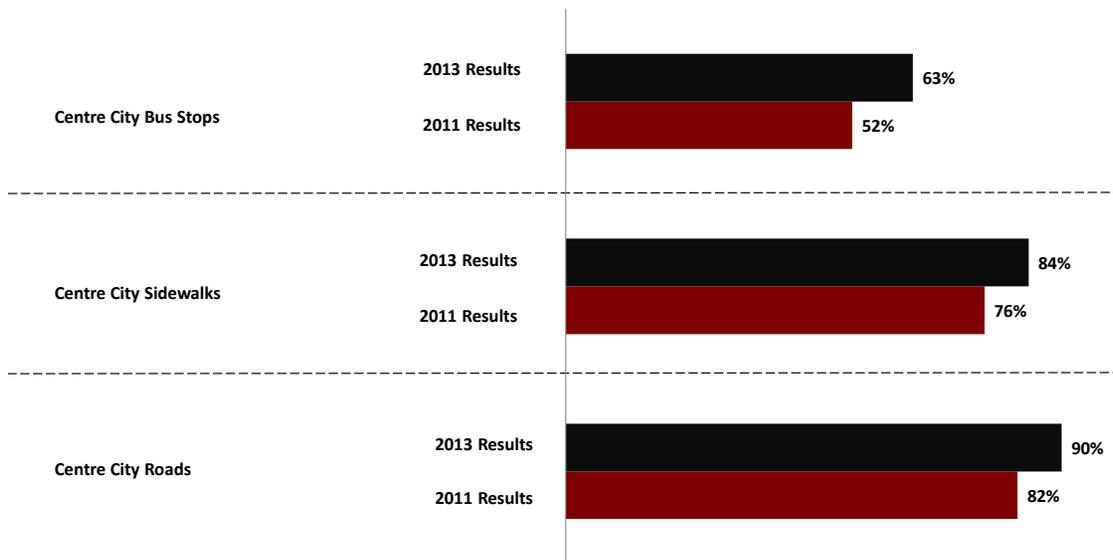
Overall Level of Cleanliness of Key Centre City Infrastructure

Calgarians report significantly increased cleanliness ratings for Centre City bus stops, sidewalks and roads.

- Cleanliness ratings increased by 11% for Centre City bus stops (from 52% to 63%) and by 8% for sidewalks (from 76% to 84%) and roads (82% to 90%).



Overall Level of Cleanliness of Key Centre City Infrastructure



Q7B. Thinking about the same Centre City areas, please rate the level of cleanliness of each. Would you say ... is very clean, reasonably clean, somewhat dirty or very dirty?

Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

The City of Calgary – Centre City Implementation (CCI) Citizen Perception Survey

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Among residents who live out/work out of Centre City, cleanliness ratings dramatically increased for Centre City C-Train stations, bus stops, sidewalks, roads and CPR Underpasses.

- Ratings increased by 21% for C-Train stations (from 59% to 80%), 15% for bus stops (from 48% to 63%), 12% for roads (from 80 to 92%), 11% for sidewalks (from 74% to 85%) and 10% for CPR Underpasses (from 46% to 56%).

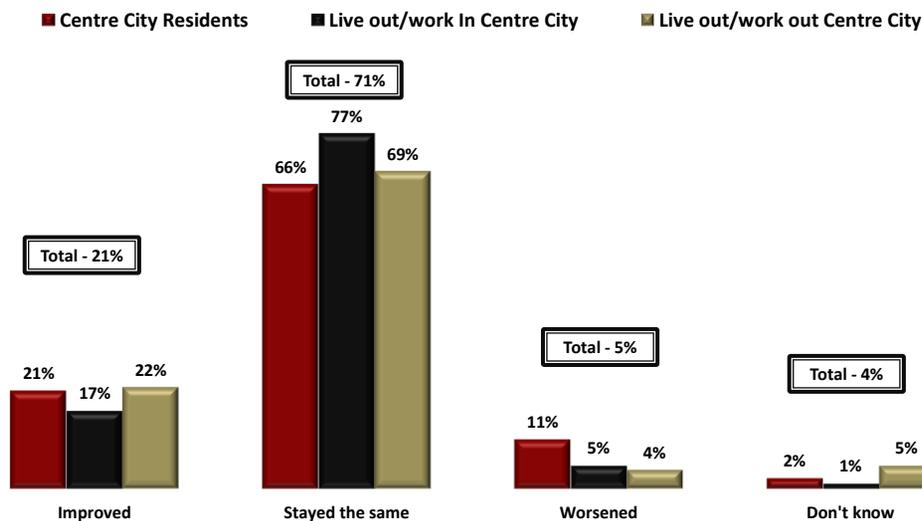
Level of Cleanliness in the Centre City in the Last 12 months

Calgarians are more likely to say that Centre City cleanliness has stayed the same in the last 12 months.

- A strong majority (92%) of Calgarians report the overall cleanliness of the Centre City in the last year has either improved (21%) or stayed the same (71%).
- Only 5% of Calgarians think cleanliness has worsened over the last 12 months.



Level of Cleanliness in the Centre City in the Last 12 Months



Q8. In the last 12 months, would you say cleanliness in the Centre City has improved, stayed the same or worsened?
Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

The City of Calgary – Centre City Implementation (CCI) Citizen Perception Survey

Centre City residents are less likely to say that Centre City cleanliness is improving.

- Among all Centre City residents, the proportion who thinks that cleanliness has improved in the Centre City over the past year has dropped by 14 % (from 35% to 21%). This is offset by a 12% increase in views that cleanliness has stayed the same (from 54% to 66%).

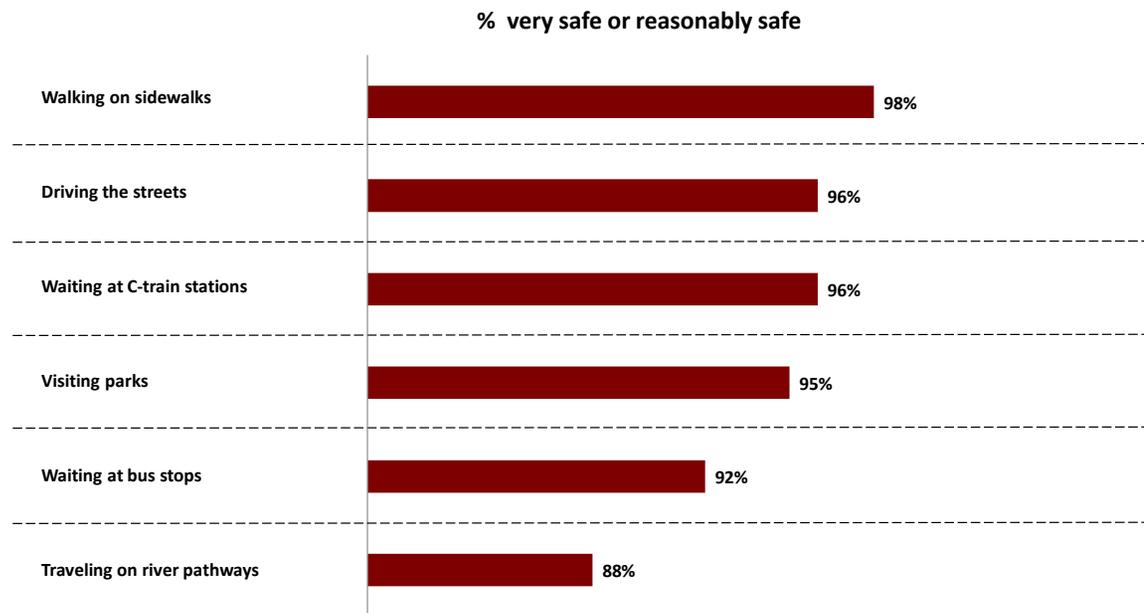
Perceptions of Safety

Calgarians continue to perceive safety in doing six activities alone in the Centre City between 8 am and 5 pm as very safe or reasonably safe.

- This includes walking on sidewalks (98%), driving the streets (96%), waiting at C-train stations (96%), visiting parks (95%), waiting at bus stops (92%), and travelling on river pathways (88%).
- The lowest safety score is 60% of Calgarians feeling safe cycling on an on-street bike route. This low score is partly driven by this activity having the highest level of “don’t know” responses (17%).



Perceptions of Centre City Safety - Between 8am and 5pm



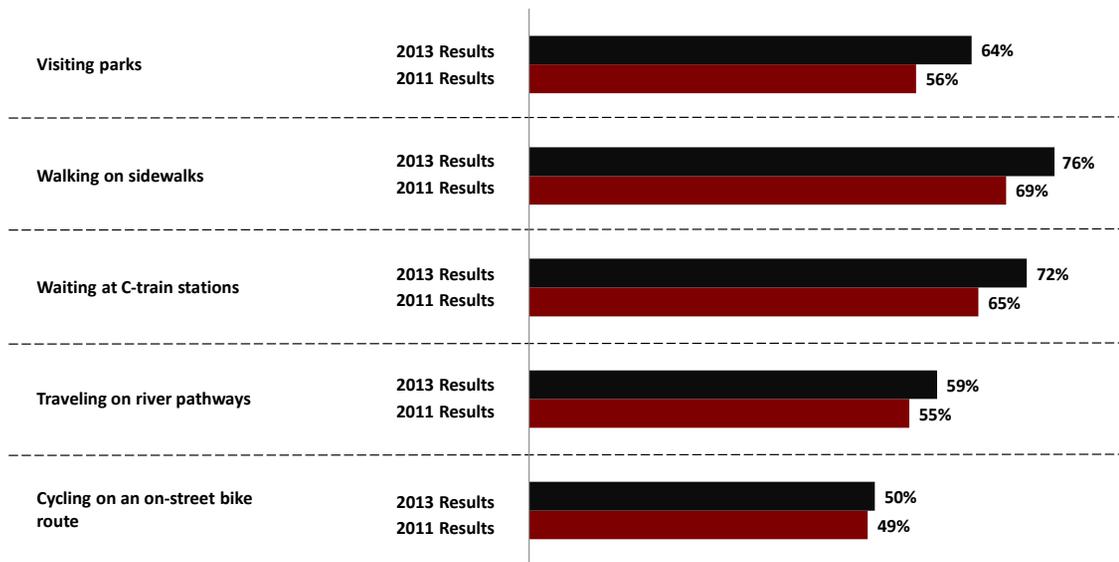
Q10. Please indicate how safe you feel, or would feel, doing the following activities alone in the Centre City. How safe would you feel ... alone between 8am and 5pm during weekdays or on the weekend? Would you say very safe, reasonably safe, somewhat unsafe or very unsafe?
Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

Since 2011, Centre City safety ratings (very safe or reasonably safe) have increased by a statistically significant amount for five activities for the 5 pm to 10 pm timeframe.

- Calgarians report an increased perception of safety in visiting parks (from 56% to 64%), walking on sidewalks (69% to 76%), waiting at C-train stations (65% to 72%), travelling on river pathways (55% to 59%) and cycling on an on-street bike route (46% to 50%).



Perceptions of Centre City Safety - Between 5pm and 10 pm



Q10. Please indicate how safe you feel, or would feel, doing the following activities alone in the Centre City. How safe would you feel ... alone between 5pm and 10pm during weekdays or on the weekend? Would you say very safe, reasonably safe, somewhat unsafe or very unsafe?
 Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

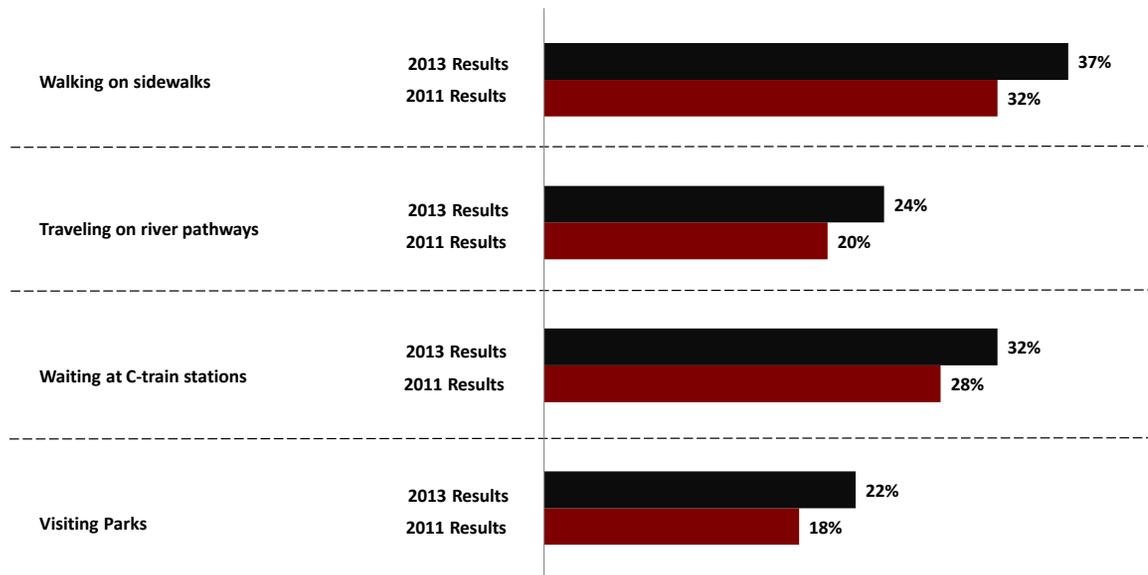
- Safety ratings for travelling on river pathways increased by 6% (from 56% to 62%) among Centre City residents.
- Among residents who live out/work out Centre City, safety ratings increased significantly for several items. These include waiting at C-Train stations (from 62% to 74%), visiting parks (from 53% to 65%) and walking on sidewalks (from 65% to 74%).

Calgarians report increased or stable safety ratings for each activity after 10 pm when compared to 2011.

- Centre City safety ratings after 10 p.m. have increased by a statistically significant amount for walking on sidewalks (from 32% to 37%), travelling on river pathways (20% to 24%), waiting at C-Train stations (28% to 32%) and visiting parks (from 18% to 22%).
- These ratings were largely driven by residents who live out/work out of Centre City.



Perceptions of Centre City Safety – After 10 pm



Q10. Please indicate how safe you feel, or would feel, doing the following activities alone in the Centre City. How safe would you feel ... alone between 5pm and 10pm during weekdays or on the weekend? Would you say very safe, reasonably safe, somewhat unsafe or very unsafe?
Base: Live inside Centre City (n=336); Live out/work in Centre City (n=333); Live out/work out Centre City (n=334)

Safety in the Centre City in the Last 12 Months

Calgarians are more likely to say that Centre City safety has stayed the same in the last 12 months.

- Among all Calgarians, 91% feel that safety in the Centre City has either improved (18%) or stayed the same (73%).
- The proportion of all Calgarians who say that safety has improved has decreased by 6% (24% to 18%).
- This is offset by an 11% rise in views that safety has stayed the same (from 62% to 73%)
- The drop in improved perceptions is fairly consistent across all 3 segments, but less pronounced for Centre City residents.

Living

Centre City residents aren't quite the newcomers to Calgary as they were in the previous survey.

- The proportion of Centre City residents who have lived in Calgary for 5 years or less has fallen from 29% to 13%. This year's results also show that Centre City residents have lived in Calgary for roughly the same amount of time as residents who live out/work in Centre City.

Centre City residents continue to say that they are likely to remain living in the area for at least the next three years.

- 83% of Centre City residents report that they are very/somewhat likely to remain living in the area with only 5% indicating that they are not at all likely to stay. Of that 5%, the majority (62%) state re-location outside the city of Calgary as the top reason for leaving.

Residents living outside of the Centre City continue to report that it is not likely that they will move into the Centre City in the next three years.

- Only 9% of residents who live out/work in Centre City and 13% of residents who live out/work out of Centre City say it is very or somewhat likely that they will move into the Centre City.

Attitudinal Statements- Community and the Centre City

Centre City residents enjoy living in their community and actively engage in multiple activities within the Centre City.

- 91% of Centre City residents report that the Centre City is a desirable place to live with 93% proud to live in their neighbourhood.
- Most Centre City residents go out in their community for non-work activities (e.g. dining, shopping, recreation, entertainment and groceries) on a daily or weekly basis during week days (83%), during the weekend (70%)) and on week day evenings (65%).
- Centre City residents reported a significant increase in the frequency of visiting Centre City venues on a monthly or more basis. Ratings increased for shopping (73% to 83%) eating lunch (64% to 70%) and eating dinner in a restaurant/bar (66% to 75%).

Even those who do not live in the Centre City are spending more time taking part in activities and contributing to a vibrant core.

- Among residents who live out/work out of Centre City, monthly or more visits are up 12% for eating lunch (from 19% to 31%) or dinner (up 9% from 22% to 31%) in a restaurant/bar and for up 10% for shopping in the Centre City (from 15% to 25%).
- Among residents who live out/work in Centre City monthly or more visits remain steady at 74% for eating lunch, 52% for shopping, however report a significant increase of 7% (from 48% to 55%) for eating dinner in a Centre City restaurant/bar.

Among all Calgarians there is near universal agreement of pride to be a Calgarian, pride in one's own neighbourhood and of the importance of community.

- I am proud to be a Calgarian (99%)
- I am proud to live in my neighbourhood (98%)
- A sense of community in my neighbourhood is important to me (92%)
- There is a strong sense of community in my neighbourhood (80%)
- I am regularly involved in neighbourhood and local community events (58%)

Calgarians are significantly more likely to state that the Centre City is a desirable place for me to live.

- Among all Calgarians, 49% agree that the Centre City is a desirable place for them to live, an increase of 11% from 2011.
- Those living and working outside of the Centre City are significantly (16%) more likely to say that the Centre City is a desirable place for me to live (from 27% to 43%).

Initiatives That Would Make Centre City a More Desirable Place to Visit, Work, and Live

Among all Calgarians, the top three initiatives or changes that would make the Centre City a more desirable place to visit work and live are as follows:

- Safety/ security (23%)
- Improve (public) transportation access (including bus transit, C-Trains, vehicle, etc.) (15%)
- Provide more (cheaper) parking spots (14%)

For each of the three key segments, the top three initiatives or changes are as follows:

- For **Centre City residents**, the top three are safety/security (24%), improving policing/patrols (14%) and address homeless/panhandlers/vagrants (12%).
- For residents who **live out/work in Centre City**, the top three are safety/ security (23%), improving access to public transportation (18%) and better/more (cheaper) housing rents/housing (17%).
- For residents who **live out/work out of Centre City**, the top three are safety/ security (21%), improving access to public transportation (15%) and providing more (cheaper) parking spots (15%).