2021 Greater Downtown Perceptions Survey

Final Report

December 2021

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Ipsos Public Affairs

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Background, Methodology and Key Observations

Background

Calgary's Greater Downtown Plan, approved by Council in April 2021, replaces the long-standing Centre City Plan. This new Plan provides the roadmap for the future of Calgary's downtown, including the vision and strategic moves that will support the reinvention of Greater Downtown.

- Calgary's Greater Downtown includes the communities of Beltline (including Stampede Park), Chinatown, Downtown Commercial Core, East Village, Eau Claire and Downtown West End.
  - The Greater Downtown is bounded by the Bow and Elbow rivers to the north and east, and 17^{th} Avenue South and 14^{th} Street West.
- In response to the challenges facing downtown, the Downtown Strategy business unit was recently established to bring leadership, focus and action to the implementation of the Greater Downtown Plan. The Downtown Strategy aims to get major organizations focused on private investment, generating visits and commerce, and enhancing the quality of life for people who live and working the downtown.
- The Greater Downtown Perceptions Survey (formerly known as the Centre City Survey) was initiated in 2009 to create solid benchmarks based on citizens' views and perceptions. The survey was repeated in 2011, 2013, 2015, 2017, 2019 and this report updates citizens' views and perceptions of the Greater Downtown in 2021.
- The reader should note that the 2021 survey was conducted during the COVID-19 pandemic which has impacted Calgarians working and visiting the Greater Downtown area.

Research Objectives

The overarching objective of this research is to better understand the opinions and perceptions that Calgarians have about the Greater Downtown area and gauge how they have changed over time.

- Further, understanding differences between the following three categories of Calgarians is of critical importance:
  - Residents who **live downtown**
  - Residents who **live outside of downtown but work downtown;** and,
  - Residents who both **live and work outside of downtown.**
- Specific objectives include assessing:
  - Downtown visitation patterns;
  - Perceptions of infrastructure, parking, safety and cleanliness downtown;
  - Desirability of downtown as a place to live, work and visit;
  - Initiatives that could make downtown a more desirable place to live, work and visit; and,
  - Attitudes towards Calgary's Greater Downtown area.

Methodology

- Ipsos conducted a telephone survey with a randomly selected sample of 1,021 Calgarians aged 18 years and older between September 7 and October 4, 2021.
  - Landline (n=281), cell phone (n=492), and listed ‘Postal Walk’ sample from InfoCanada which targets letter carrier walks (n=248) were used. Business sample was also used resulting in 65 completed interviews of the total n=1,021.
  - The average interview length was 19 minutes.
- Equal quotas were initially established for three specific target groups and were modified during the data collection period due to lower incidence of living and working downtown during the COVID-19 pandemic. The final quotas for each target audience in 2021 are as follows:
  - Residents who **live downtown** (n=250)
  - Residents who **live outside of downtown but work downtown** (n=315)
  - Residents who both **live and work outside of downtown** (n=422)
- Final data were weighted to ensure the overall sample’s age and gender composition reflects that of the actual Calgary population aged 18 or older according to the most recent census data, as well as the estimated distribution of residents in the three target groups.
- The margin of error (MOE) for the total sample of 1,021 is ±3.1 percentage points, 19 times out of 20.
  - The margin of error for a sample size of n=250 is ±6.2 percentage points, 19 times out of 20, the margin of error for a sample size of n=315 is ±5.5 percentage points, 19 times out of 20, and the margin of error for a sample size of n=422 is ±4.8 percentage points, 19 times out of 20.
- Where possible, results are compared to previous iterations of the survey.
- The reader should note that data labels of <3% are not shown in charts, and that in some charts, totals may not equal 100% due to rounding.
- Throughout the report, references to ‘downtown’ refer to Calgary’s Greater Downtown area.

Insights I Observations

Impact of COVID-19: The incidence of visiting downtown has significantly declined since 2019

Given COVID-19 precautions and restrictions, it is not surprising that the incidence of visiting all downtown venues has notably declined since 2019, and that the importance of downtown's Plus 15 system has declined. Conversely, the importance of downtown river pathways has increased since two years ago.

Downtown C-train Stations Need Attention: Notable declines emerge in 2021

Perceptions of downtown C-train stations show consistent declines in several areas: 'excellent' condition of C-train stations is lower, 'safety' in using downtown C-train stations is lower, and 'cleanliness' of downtown C-train stations is also lower. Of all of the downtown infrastructure assessed, C-train stations require the most attention.

Affordability: Calgarians continue to see the cost of living, housing/rent and parking to be costly downtown

Improved affordability of living downtown is the second strongest motivator to encourage Calgarians to move downtown. As in 2019, the theme of affordability consistently surfaces in the survey's results and acts as a barrier to living and visiting the Greater Downtown area.

Insights I Observations

Desirability of Living Downtown: 'Desirability' is the most influential factor to retain residents and attract new ones

Also consistent with results in 2019, the key driver analysis shows that perceiving the Greater Downtown area as a desirable place to live has the greatest amount of influence on the likelihood of current downtown residents remaining downtown and on the likelihood of live-out residents choosing to consider a move to downtown. Defining 'desirability' could be further explored in future research to understand the factors that most impact how 'desirable' the downtown area is to the various target audiences and what 'undesirable' downtown living means as well.

Crime and Safety: Views of crime and safety downtown continues to 'worsen'

The perception that crime and safety have 'worsened' has continually increased since 2017, especially among downtown residents in comparison to their live-out counterparts. As a new measure in 2021, Calgarians who view crime and safety downtown as having 'worsened' explain that it is due to homelessness, violence, substance abuse. Crime and safety also acts as a key factor for moving out of downtown.

Decline in Perceptions of Downtown: Views are becoming more negative

Several measures related to Calgarians' perception of the Greater Downtown area have significantly declined in 2021. Specifically, lower ratings are now provided for seeing Calgary's downtown as 'the heart of Calgary', that downtown 'identifies the identity of Calgary', that downtown is 'a desirable place to live', and that downtown is a 'convenient meeting place to socialize with family and friends.'

Downtown Vibrancy Is Important: Calgarians desire investment in downtown revitalization

Having diverse activities and services is the key reason to attract people to live and visit the Greater Downtown area. A sizeable majority of Calgarians agree that 'having a vibrant downtown is important to attracting new investment to Calgary' and that 'revitalizing areas of Calgary's downtown should be a focus over the next five years.'

Visitation Patterns

Incidence of Visiting Downtown Venues (1/2)

The majority of Calgarians have visited downtown venues in the past 12 months, especially among those who live downtown; however, downtown visits have significantly declined for all venues since 2019 likely as a result of COVID-19 restrictions.

- Almost eight-in-ten (79%) of Calgarians have visited a downtown venue within the past year, down from 90% in 2019. Those who are more likely to have visited ‘none’ of the venues are:
  - Those who live and work outside of downtown (22% have not visited any downtown venues) and those who live out but work downtown (18%) vs. those who live downtown (9%), those with a high school education or less (28%) or some post-secondary education (24%) vs. those with a university degree (16%), those with annual household incomes of less than $60K (23%), $60-<$90K (23%) or $90-<$150K (20%) vs. $150K+ (11%), and citizens aged 55+ (32%) vs.18-34 (10%).
- Just over one-half (55%) of Calgarians have eaten dinner at a downtown bar or restaurant, down from 66% in 2019. Downtown dining is higher among:
  - Residents who live downtown (69%) and those who live outside of downtown but work downtown (63%) vs. those who live and work outside of downtown (51%), younger citizens aged 18-34 (68%) vs. 55+ (40%), the university-educated (60%) vs. those with some post-secondary education (51%) or with a high school education or less (42%), those with annual household incomes of $150K+ (68%) vs. $90K-<$150K (56%)and $60K-<$90K (50%) and <$60K (43%).
- Four-in-ten (40%) citizens have visited a downtown plaza or park within the past year, declined from 54% in 2019, showing higher incidences of visitation among:
  - Those who live downtown (56%) vs. those who live outside of downtown but work downtown (43%) and those who live and work outside of downtown (38%), those aged 18-34 (44%) and 35-54 years (43%) vs. 33% of those 55+, citizens with a university degree (46%) or some post-secondary (38%) vs. 25% with a high school education or less, and those with annual household incomes of $150K+ (53% vs. 42% $90K-<$150K, 31% $60K-<$90K and 36% <$60K).

Incidence of Visiting Downtown Venues (2/2)

- One-third (33%) of Calgarians have shopped downtown within the past year, down from 51% in 2019, and showing higher incidence rates among:
  - Residents of downtown (58%) vs. those who live and work outside of downtown (28%), citizens with a university degree (39%) vs. some post-secondary (27%), and those with children in the household (36% vs. 28% without children).
- Just more than one-quarter (26%) of Calgarians have attended or visited a festival, event, museum or art gallery, theatre or concert downtown within the past year, significantly down from 59% in 2019, with higher visitation noted among:
  - Renters (32% vs. 24% of property owners) and those aged 18-34 (32% vs. 21% aged 55+).
- Two-in-ten (21%) Calgarians have visited the Central Library or other library branches within the past year, significantly down from 45% in 2019, with higher visitation among:
  - Those who live downtown (33%) or who live out of downtown but work downtown (27%) vs. citizens who live and work outside of downtown (18%), those aged 18-34 (28% vs. 16% aged 35-54), the university-educated (26% vs. 17% with some post-secondary and 14% with a high school education or less), and those who self-describe as a racialized person (29% vs. 19% who do not).
- As well, 7% have attended a sporting event downtown within the past year, notably down from 32% in 2019 given the COVID-19 restrictions experienced in 2020/2021.

Transportation Within the Greater Downtown (1/2)

Personal vehicles are the most frequently used mode of transportation within the Greater Downtown area, followed by walking.

- Seven-in-ten (70%) Calgarians say that they use a personal vehicle most frequently to move around the downtown core, similar to 65% in 2019, particularly among those who live and work outside of downtown (72%) and those who live outside of downtown but work downtown (68%) vs. 50% who live downtown.
  - Property owners are also more likely to use personal vehicles to move around downtown (75% vs. 53% of renters), as are those aged 35-54 (74% vs. 64% aged 18-34), those with a university degree (72%) or some post-secondary education (73%) vs. those with a high school education or less (53%), those with higher annual household incomes of $150K+ (77%), $90K-<$150K (69%) or $60K-$<$90K (74%) vs. <$60K (57%), those with children in household (77% vs. 65% without children) and racialized people (77% vs. 68% who are not).
- Next, 42% of Calgarians say they move around the Greater Downtown most often via walking on a sidewalk, similar to 43% in 2019, and especially among those who live downtown (67%) vs. those who live and work outside of downtown (38%).
  - Walking is also used more often by renters (50% vs. 39% of property owners), those aged 35-54 (44%) vs. 36% among those aged 55+, the university-educated (46%) vs. those with some post-secondary education (37%), and by those who do not self-describe as a racialized person (44% vs. 34% who do).
- The LRT is used by 29% of Calgarians when downtown, lower than 38% in 2019.
  - The LRT is used more frequently by renters (38% vs. 25% of property owners), those aged 18-34 (34% vs. 24% 55+), and those with lower annual household incomes of <$60K (40% vs. 28% $90K-<$150K and 26% $150K+).
- Further, 14% are most frequently using river pathways, higher than 10% in 2019, and higher among those with a university education (19% vs. 11% with some post-secondary and 6% with a high school education or less) and among those with annual household incomes of $90K-<$150K (19%) or $60K-<$90K (18%) vs. 8% <$60K).

Transportation Within the Greater Downtown
(2/2)

- Another 11% are using a cab or car service downtown, similar to 12% in 2019, and higher among those who live downtown (17%) vs. those who live and work out of downtown (11%) and those who live out of downtown but work downtown (11%).
  - Those more likely to use a cab or car service include those aged 18-34 (17% vs. 9% 35-54 and 8% aged 55+) and renters (16%) vs. property owners (9%).
- The Plus 15 system is being used by 10% of Calgarians, and is most often used by those who work downtown but live outside of downtown (20% vs. 8% among those who live and work outside of downtown and 8% of those who live downtown).
  - The Plus 15 system is also used more frequently by those aged 35-54 years (13% vs. 5% 18-34 years).
- One-in-ten (10%) have used on-street cycle routes, consistent with 8% in 2019, and most notably among those who live downtown (14%) vs. those who live and work outside of downtown (8%).
- Further, 9% are using the bus most frequently when downtown, similar to 12% in 2019, and higher among residents of downtown (13%) vs. those who live outside of downtown but work within downtown (6%).
  - Citizens aged 55+ (14%) are more likely to use the bus than are 35-54 year-olds (9%), as are those with annual household incomes of <$60K (16%, vs. 7% $60K-<$90K and 6% $150K+).
- Lastly, five percent (5%) of Calgarians are using motorized scooters as their primary means to move around downtown.

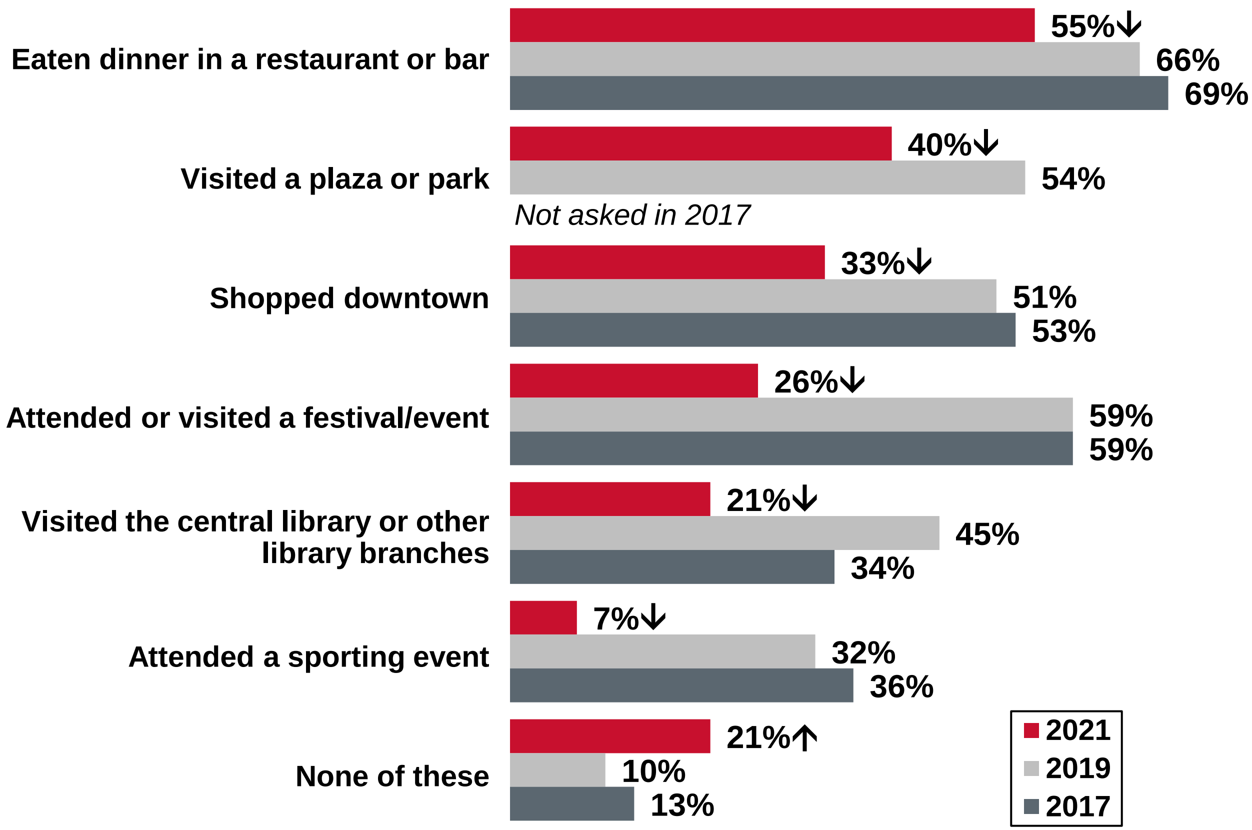
Calgary

Frequency of Going Out Downtown

Less than two-in-ten Calgarians are going out in the Greater Downtown area on a daily or weekly basis during weekdays, weekday evenings and weekends.

- Typically, 19% of Calgarians visit downtown during weekdays on a daily (3%) or weekly (15%) basis, which rises to 66% among downtown residents.
  - Visiting downtown on at least a weekly basis during weekdays is higher among renters (26% vs. 16% of property owners), those with a high school education or less (22%) or with a university degree (24%) vs. those with some post-secondary education (10%), those likely to move downtown (34% vs. 13% who are not likely to move downtown), and those who have previously lived downtown (23% vs. 13% who have not).
- During the weekend, 14% of Calgarians go out in the downtown area either daily (4%) or weekly (11%), which is much higher among those who live downtown (56%).
  - Going out downtown during the *weekend* on a daily or weekly basis is higher among renters (21% vs. 12% of property owners), those with a university degree (17%) vs. those with some post-secondary education (11%), those without children in the household (16%) vs. those with kids (10%).
- In addition, 14% of Calgarians say that they typically go out downtown during weekday evenings either daily (3%) or weekly (11%), which is also notably higher among residents of downtown (56%).
  - Those who are more likely to visit downtown on a daily or weekly basis during weekday evenings include renters (21% vs. 11% of property owners), younger Calgarians aged 18-34 (19% vs. 8% among those aged 55+), males (17% vs. 10% of females), those with annual household incomes of $150K+ (19% vs. 9% $60K-<.$90K), those who are self-employed (23%), and those who have lived downtown for less than 10 years (70% vs. 47% for each of residency tenures of 10-20 years and >20 years).

Incidence of Visiting Downtown Venues



2021		
Live In	Live Out Work In	Live Out Work Out
69%↑	63%↑	51%↓
56%↑	43%↓	38%↓
58%↑	43%↓↑	28%↓
30%	28%	25%
33%↑	27%↑	18%↓
10%	7%	7%
9%↓	18%↑	22%↑

↑ Statistically higher than 2019
↓ Statistically lower than 2019

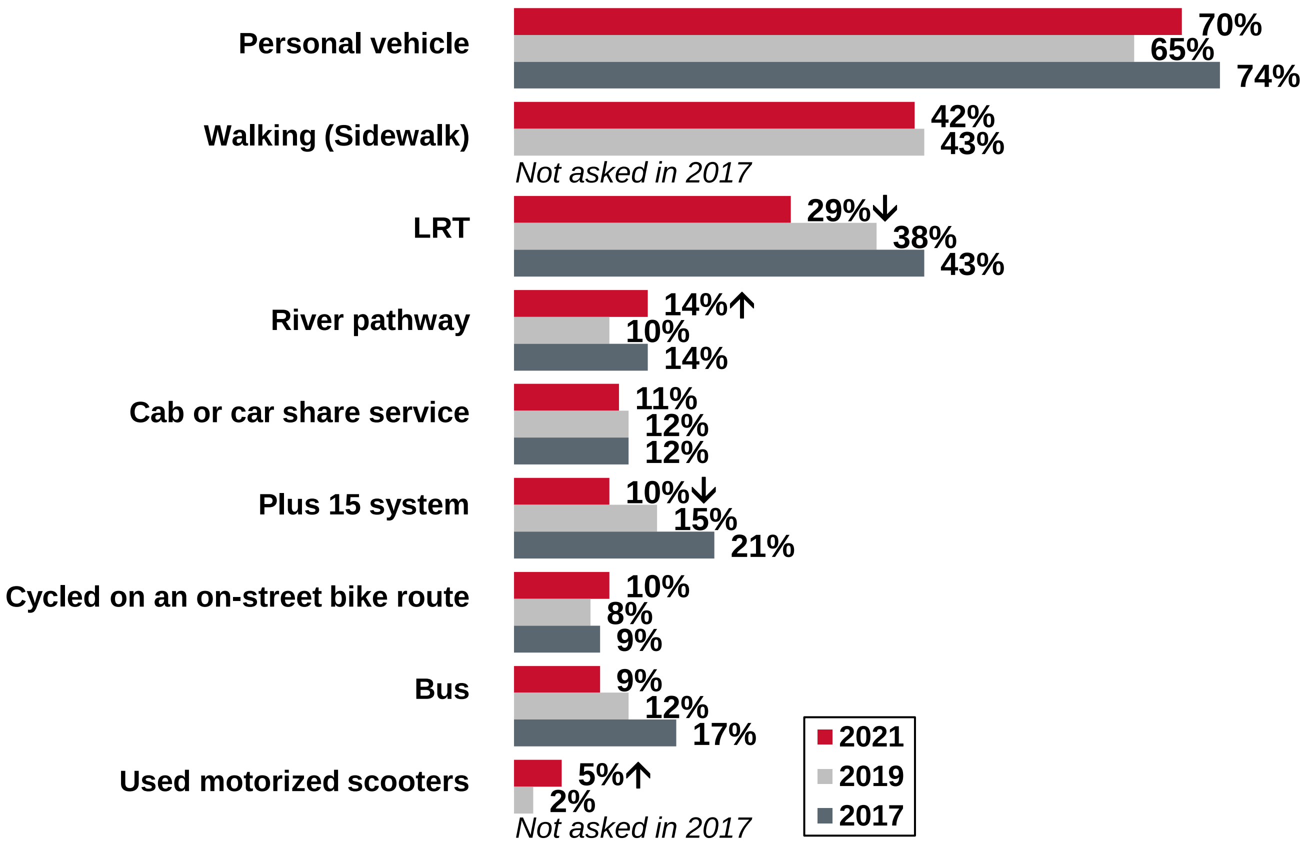
↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q4b. Which of the following have you personally done in the last 12 months?

Base: Live downtown, work downtown or have gone downtown (2021: n=987 / Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=422) / 2019 and 2017 base includes all respondents (n=1,000)

Moving Around Downtown

Multiple Responses



2021		
Live In	Live Out Work In	Live Out Work Out
50%↓	68%↑	72%↑
67%↑	50%↓↑	38%↓
23%	29%	29%
18%	15%	14%
17%↑	11%↓	11%↓
8%↓	20%↑	8%↓
14%↑	13%	8%↓
13%↑	6%↓	9%
6%	5%	5%

↑ Statistically higher than 2019
↓ Statistically lower than 2019

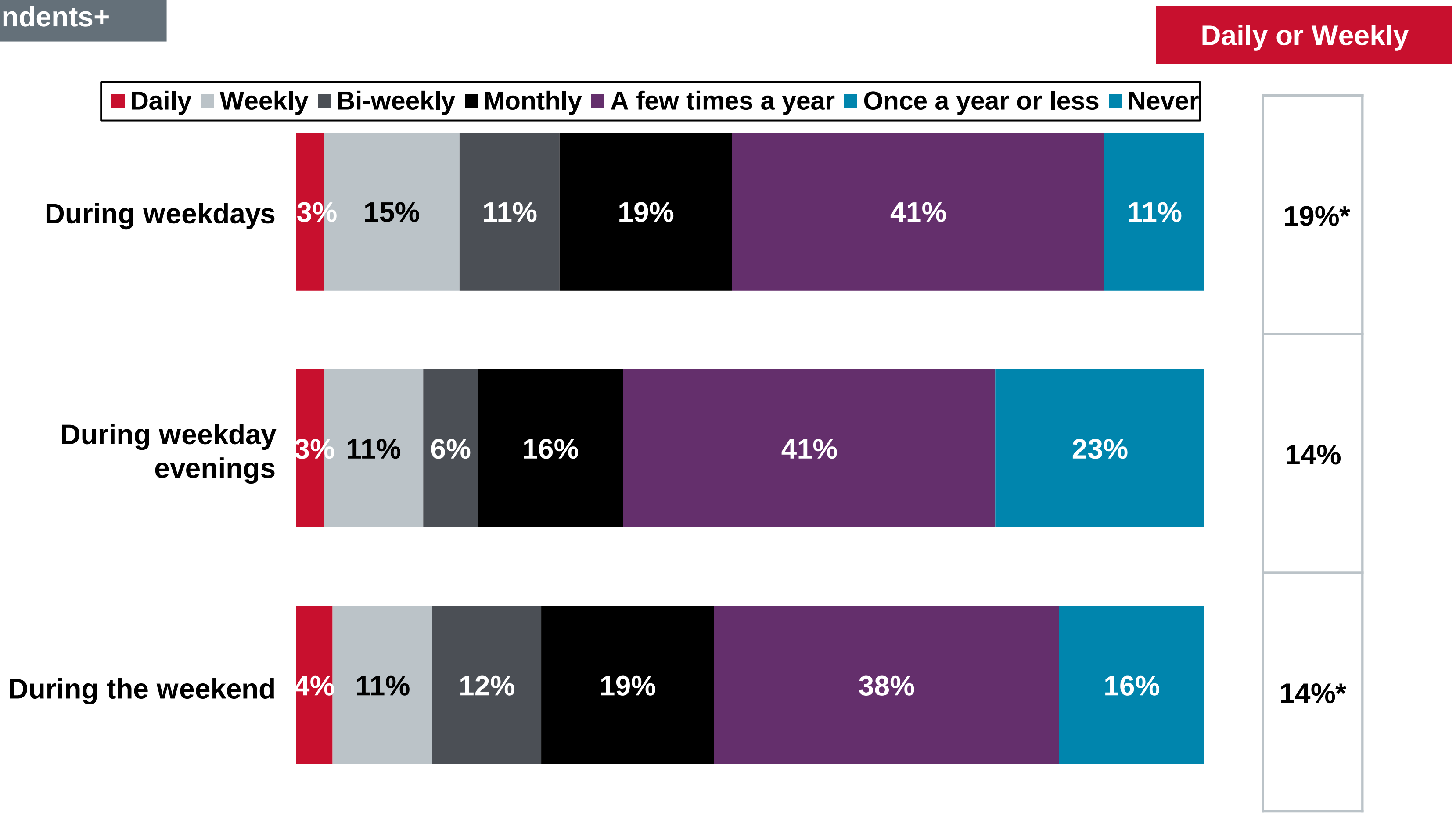
↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q4a. Which of the following are the most frequent ways you move around the Greater Downtown? (Select up to 3 items)

Base: Live downtown, work downtown or have gone downtown (2021: n=987 / Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=422) / 2019 and 2017 base includes all respondents (n=1,000)

Frequency of Going Out Downtown
- All Respondents (2021 Only) -

In 2021, this question was asked of all respondents+



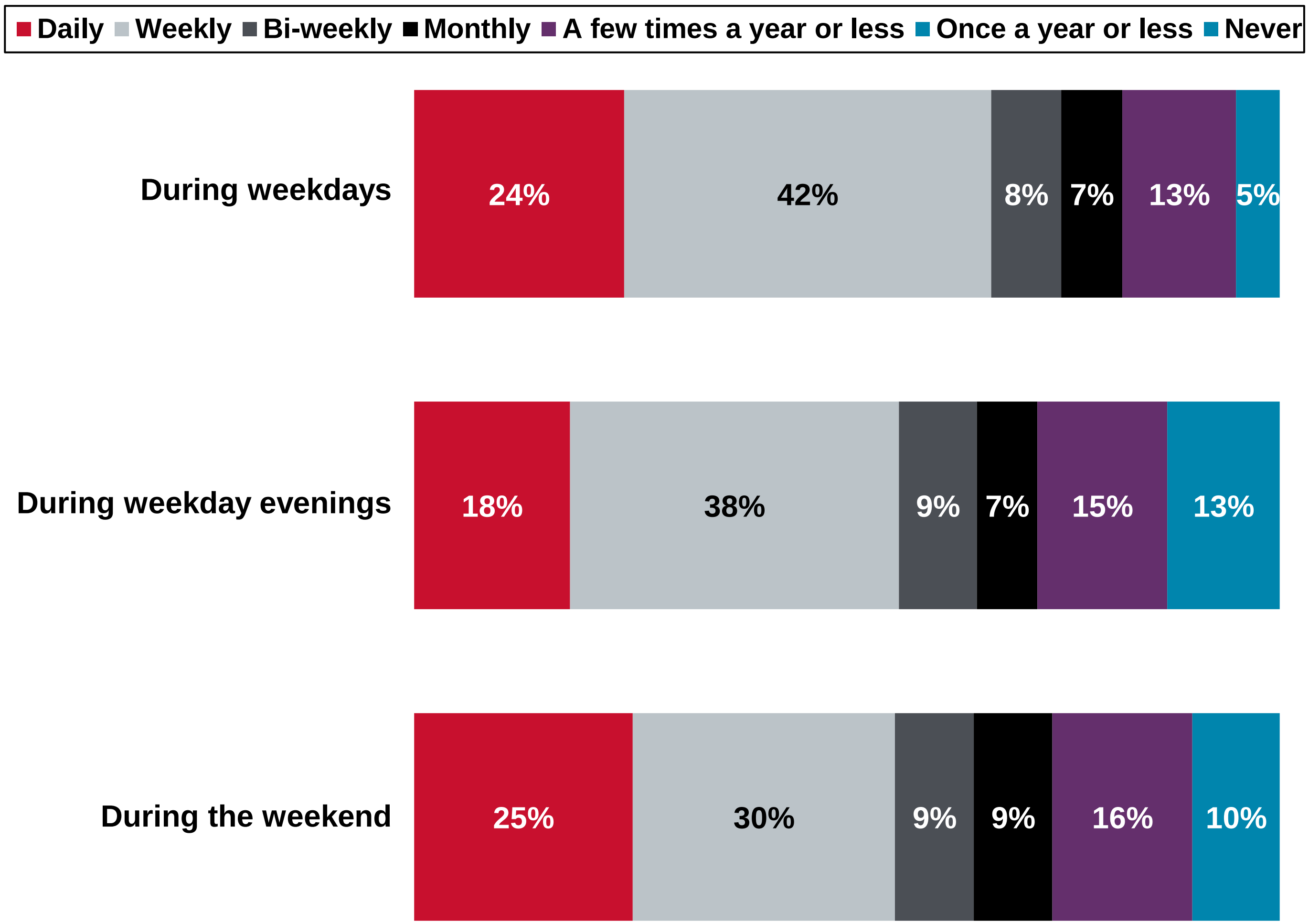
***Rounding**

Q1. Typically, now that things have opened up as we relax COVID-19 restrictions, how often do you go out in the Greater Downtown for activities including things such as dining, shopping and entertainment - but excluding work?

Base: All respondents (2021: n=1,021 / Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

+Only asked of 'Live In' respondents prior to 2021

Frequency of Going Out Downtown
- Downtown Residents -



Daily or Weekly		
2021	2019	2017
66%	67%	61%
56%	49%	48%
56%*	55%	53%

Q1. Typically, now that things have opened up as we relax COVID-19 restrictions, how often do you go out in the Greater Downtown for activities including things such as dining, shopping and entertainment - but excluding work?

Base: Respondents who live downtown 2021: (n=250) / 2019: (n=300) / 2017: (n=334)

*Rounding

Downtown Infrastructure

Assessment of Downtown Infrastructure

Calgarians were asked to assess five pieces of Downtown infrastructure (sidewalks, CPR underpasses, the Downtown Plus 15 system, C-train stations and river pathways) on the following four aspects:

IMPORTANCE	***Would you say*** *[INSERT INFRASTRUCTURE]* ***is very important, somewhat important, not very important, or not at all important to your overall experience when visiting downtown?***
CONDITION	***And, would you rate the condition of*** *[INSERT INFRASTRUCTURE]* ***in excellent condition, moderate condition, or poor condition?***
SAFETY	***How safe do you feel using*** *[INSERT INFRASTRUCTURE]* ***– very safe, somewhat safe, somewhat unsafe, or very unsafe.***
CLEANLINESS	***And, how would you rate the cleanliness of*** *[INSERT INFRASTRUCTURE]* ***– very clean, somewhat clean, not very clean, not at all clean.***

Importance of Downtown Infrastructure

The majority of Calgarians consider all downtown infrastructure to be important, but place the highest importance on downtown sidewalks and river pathways.

- The **importance** of downtown infrastructure is highest for sidewalks (94%, consistent with 95% in 2019), and is higher among those who live out of but work in the downtown area (98% vs. 93% who live and work out of downtown and vs. 95% who live downtown), and those aged 35-54 (97% vs. 92% aged 55+).
  - Next, 88% of Calgarians report downtown river pathways to be important, higher than 80% in 2019. The importance of downtown river pathways is higher among those aged 35-54 years (91%) or 18-34 years (89%) vs. 81% among those aged 55+, and the university-educated (90% vs. 81% with a high school education or less).
  - Downtown C-train stations are considered as the third most important piece of downtown infrastructure (82%, consistent with 85% in 2019), and notably higher among those who live out of but work in the downtown area (84%) vs. those who live downtown (77%), those aged 18-34 (91%) or 35-54 (85%) vs. 55+ (71%), those with annual household incomes of <$60K (92% vs. 80% $90-<$150K and 76% $150K+), and those who self-describe as a racialized person (90% vs. 79% who do not).
  - Seven-in-ten (71%) Calgarians also feel that downtown CPR underpasses are important, on par with 75% in 2019, showing higher importance ratings among those who live downtown (80% vs. 69% among those who live and work out of downtown), those aged 35-54 years (78% vs. 63% aged 18-34 years and 70% aged 55+), and those with a university education (73%) or some post-secondary (73%) vs. a high school education or less (57%).
  - Further, 69% say that the downtown Plus 15 system is important, lower than 74% in 2019. Residents who are more likely to rate the downtown Plus 15 system as important include those who live out of but work in the downtown area (79%) vs. those who live and work out of downtown (66%) and those who live downtown (67%), property owners (73% vs. 60% among renters), citizens aged 35-54 years (76%) or 55+ (69%) vs. 18-34 years (59%), and those who self-describe as a racialized person (78% vs. 66% who do not).

Condition of Downtown Infrastructure

The condition of downtown infrastructure is mostly considered to be 'moderate', with higher ratings for river pathways and the Plus 15 system, lower ratings for CPR underpasses, and decreased ratings for downtown C-train stations.

- When providing opinions about the **condition** of downtown infrastructure, roughly one-half (51%) of Calgarians believe that downtown river pathways are in *excellent* condition (similar to 52% in 2019).
  - *Excellent* condition ratings for downtown river pathways are higher among those with a university education (55% vs. 45% with some post-secondary), those with an annual household income of $150K+ (57%) or $90K-<$150K (57%) vs. $60K-<$90K (45%) and <$60K (44%), and those who self-describe as not being a racialized person (54% vs. 41% who do).
- Almost one-half (48%) of Calgarians say that the downtown Plus 15 system is in *excellent* condition (consistent with 50% in 2019).
  - Citizens more likely to say that the downtown Plus 15 system is in *excellent* condition include those who live out of downtown but work downtown (56%) vs. 45% of those who live and work out of downtown.
- Next, 28% of Calgarians say that the condition of downtown sidewalks are *excellent* (similar to 27% in 2019).
- One-quarter (25%) of Calgarians report that downtown C-train stations are in *excellent* condition (decreased from 32% in 2019), and higher among males (31%) than females (20%).
- Lastly, 14% perceive downtown CPR underpasses to be in *excellent* condition (identical to 14% in 2019), and higher among those who live downtown (20% vs. 13% who live and work out of downtown), among those with some post-secondary education (18% vs. 11% with a university degree), and those with an annual household income of <$60K (22% vs. 10% $90K-<$150K).

Safety of Downtown Infrastructure

The majority of Calgarians feel safe using all elements of downtown infrastructure evaluated; however, feelings of safety using downtown C-train stations have declined since 2019.

- The level of **safety** in using downtown infrastructure is highest for the Plus 15 system (90%, similar to 92% in 2019), not showing notable differences among demographic subgroups of the population.
- Next, 88% of Calgarians feel safe using downtown river pathways (consistent with 90% in 2019), especially among males (91% vs. 85% of females), and those aged 18-34 years (92%) vs. 55+ (83%).
- Safety ratings for using downtown sidewalks have also remained stable and strong (86% in 2021 and 89% in 2019).
- The majority of citizens feel safe using downtown CPR underpasses (71%, similar to 72% in 2019), particularly among males (78% vs. 64% of females), and among those with a high school education or less (81%) vs. those with some post-secondary education (68%).
- Slightly less than seven-in-ten (68%) residents feel safe using downtown C-train stations (lower than 76% in 2019), and C-train safety ratings are higher among those who live and work outside of downtown (70% vs. 63% of those who live out of but work in the downtown area), and safety ratings are higher among males (76% vs. 61% of females), and those with children in the household (76% vs. 65% without kids).

Cleanliness of Downtown Infrastructure

Cleanliness ratings for downtown infrastructure remain high, although declines are now seen for cleanliness ratings for downtown sidewalks and C-train stations.

- When providing opinions about the **cleanliness** of downtown infrastructure, strong ratings are provided for the Plus 15 system (91%, on par with 93% in 2019), with those who self-describe as a racialized person showing higher cleanliness ratings (96%) vs. those who do not (90%).
- Strong cleanliness ratings are also given for downtown river pathways (91%, consistent with 92% in 2019).
- The cleanliness of downtown sidewalks experiences a decline in 2019 (84%, down from 88% in 2019), and is strongest among those aged 55+ (89%) vs. 18-34 (78%), and those with annual household incomes of $150K+ (89%) vs. <$60K (77%).
- Further, 74% of residents feel that downtown C-train stations are clean, significantly declined from 84% in 2019, and receiving higher ratings from those aged 55+ (80%) and 35-54 (76%) vs. those aged 18-34 (66%).
- Two-thirds (66%) of Calgarians say that downtown CPR underpasses are clean, identical to 66% in 2019, and showing higher ratings among those who live and work outside of downtown (68%) vs. those who live out of downtown but work downtown (58%).
  - Those more likely to say that downtown CPR underpasses are clean include males (70% vs. 62% of females), those with a high school education or less (75% vs. 61% with a university education), and those with annual household incomes of <$60K (77%) vs. $60K-<$90K (64%), $90K-<$150K (65%) and $150K+ (64%).

Summary I Importance of Downtown Infrastructure

Item	Year	Very Important	Somewhat Important	% Important	Live In	Live Out Work In	Live Out Work Out
Downtown sidewalks	2021	77%	18%	94%*	2021 Important: 95%↓	98%↑	93%↓
	2019	80%	15%	95%			
	2017	75%	20%	94%*			
Downtown river pathways	2021	65%	22%	88%*↑	2021 Important: 86%	88%	88%
	2019	60%	20%	80%			
	2017	54%	25%	79%			
Downtown C-train stations	2021	61%↓	21%↑	82%	2021 Important: 77%↓	84%↑	81%
	2019	69%	15%	85%*			
	2017	69%	16%	85%			
Downtown CPR underpasses	2021	41%	30%	71%	2021 Important: 80%↑	75%	69%↓
	2019	43%	32%	75%			
	2017	44%	30%	74%			
Downtown Plus 15 system	2021	45%↓	24%	69%↓	2021 Important: 67%↓	79%↑	66%↓
	2019	51%	23%	74%			
	2017	48%	23%	71%			

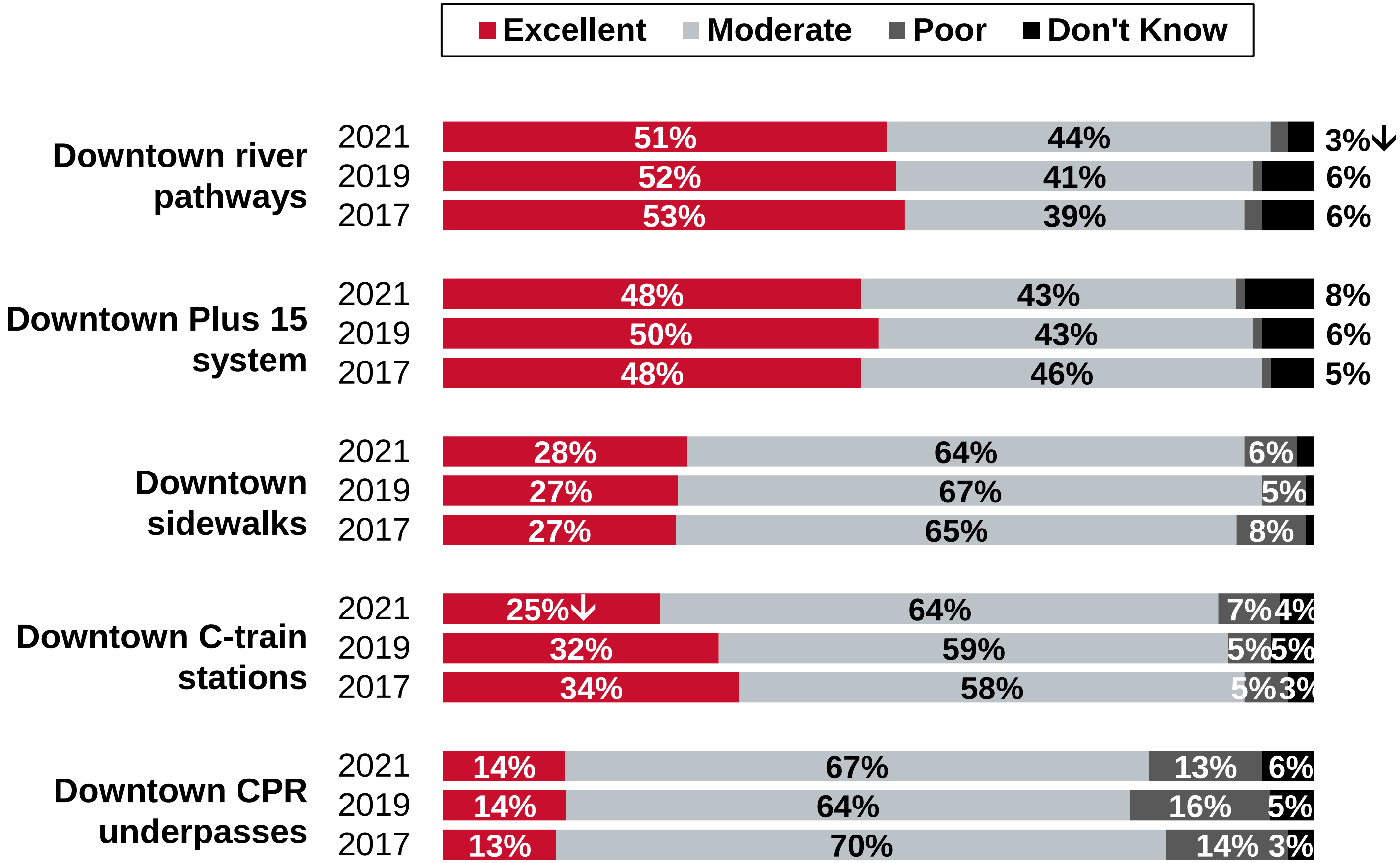
↑ Statistically higher than 2019
↓ Statistically lower than 2019

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q5B. Would you say this is very important, somewhat important, not very important or not at all important to your overall experience when visiting downtown? How about ...? How important is this?
Base: Live downtown, work downtown or have gone downtown (2021: n=987 / Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=422) / 2019 and 2017 base includes all respondents (n=1,000)

*Rounding

Summary I Condition of Downtown Infrastructure



2021 Excellent	Live In	Live Out Work In	Live Out Work Out
Downtown river pathways	51%	52%	50%
Downtown Plus 15 system	51%	56%↑	45%↓
Downtown sidewalks	29%	25%	29%
Downtown C-train stations	24%	26%	25%
Downtown CPR underpasses	20%↑	14%	13%↓

↑ Statistically higher than 2019
↓ Statistically lower than 2019

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q6.1 How would you rate the condition of…
Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance of each item (Bases vary)

Data labels <3% are not shown

Summary I Safety Using Downtown Infrastructure

		Very Safe	Somewhat Safe	% Safe	2021 Safe: Live In	2021 Safe: Live Out Work In	2021 Safe: Live Out Work Out
Downtown Plus 15 system	2021	58%↓	32%	90%	90%	92%	90%
	2019	64%	27%	92%*			
	2017	63%	30%	92%*			
Downtown river pathways	2021	45%	43%	88%	87%	87%	88%
	2019	47%	43%	90%			
	2017	45%	43%	89%*			
Downtown sidewalks	2021	33%↓	53%↑	86%	86%	82%	87%
	2019	41%	47%	89%*			
	2017	40%	48%	88%			
Downtown CPR underpasses	2021	24%	47%	71%	71%	69%	72%
	2019	26%	46%	72%			
	2017	28%	49%	77%			
Downtown C-train stations	2021	19%↓	49%	68%↓	64%	63%↓	70%↑
	2019	26%	50%	76%			
	2017	31%	47%	78%			

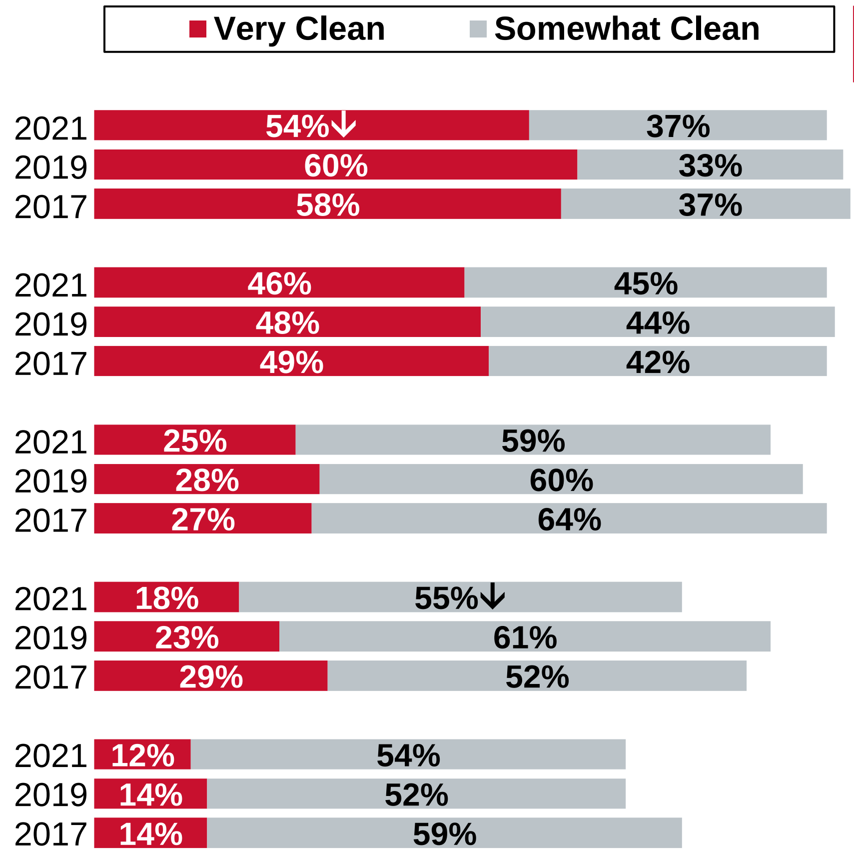
↑ Statistically higher than 2019
↓ Statistically lower than 2019

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q6.2. How safe do you feel using…
Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance of each item (Bases vary)

*Rounding

Summary I Cleanliness of Downtown Infrastructure



	Year	% Clean	2021 Clean: Live In	2021 Clean: Live Out Work In	2021 Clean: Live Out Work Out
Downtown Plus 15 system	2021	91%	90%	93%	90%
	2019	93%			
	2017	94%*			
Downtown river pathways	2021	91%	92%	92%	91%
	2019	92%			
	2017	92%*			
Downtown sidewalks	2021	84%↓	84%	80%	85%
	2019	88%			
	2017	90%*			
Downtown C-train stations	2021	74%*↓	72%	71%	74%
	2019	84%			
	2017	81%			
Downtown CPR underpasses	2021	66%	65%	58%↓	68%↑
	2019	66%			
	2017	74%*			

↑ Statistically higher than 2019
↓ Statistically lower than 2019

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q6.3. And how would you rate the cleanliness of…
Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance of each item (Bases vary)

Rounding

Summary I Downtown Infrastructure

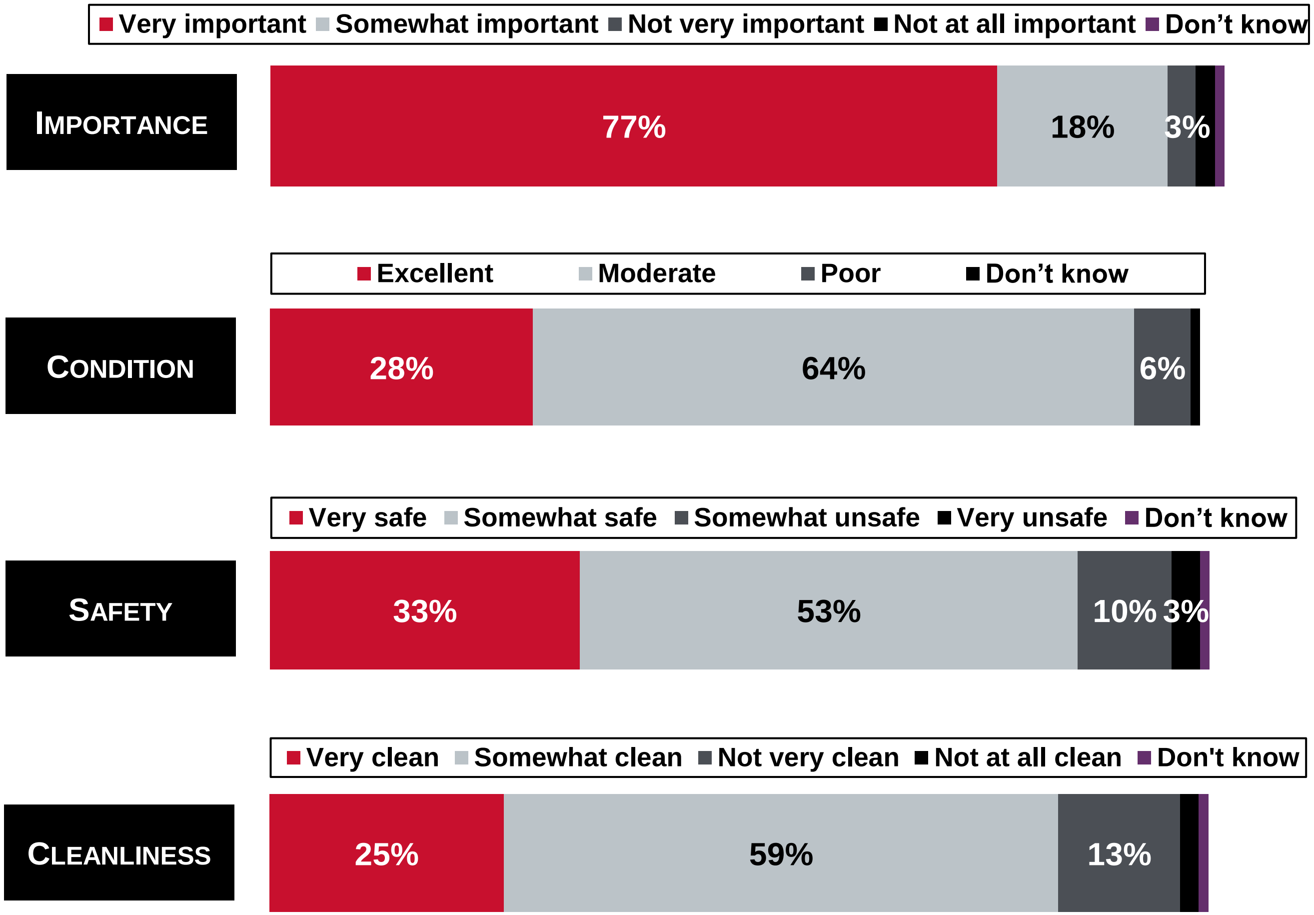
Summary

Downtown Infrastructure	% Important	% Excellent Condition	% Feel Safe Using It	% Clean
Sidewalks	94%	28%	86%	84%
C-train stations	82%	25%	68%	74%
River pathways	88%	51%	88%	91%
CPR underpasses	71%	14%	71%	66%
Plus 15 system	69%	48%	90%	91%

Highest ratings | Lowest ratings

- **Sidewalks:** The most important Downtown infrastructure with moderate ratings for its condition, but strong ratings for safety in using them and cleanliness.
- **C-train stations:** Mid-level ratings for importance, condition and cleanliness, but lowest ratings for feeling safe using it.
- **River pathways:** In the most excellent condition and tied with the highest cleanliness ratings, with mid-level ratings for importance and safety.
- **CPR underpasses:** Lowest ratings for being in excellent condition and for cleanliness, and mid-level ratings for importance and safety.
- **Plus 15 system:** Considered the safest and cleanest, but least important.

Summary I Downtown Sidewalks



	TOTAL	Live In	Live Out Work In	Live Out Work Out
Very or Somewhat Important				
	94%*	95%↓	98%↑	93%↓
Excellent Condition				
	28%	29%	25%	29%
Very or Somewhat Safe				
	86%	86%	82%	87%
Very or Somewhat Clean				
	84%↓	84%	80%	85%

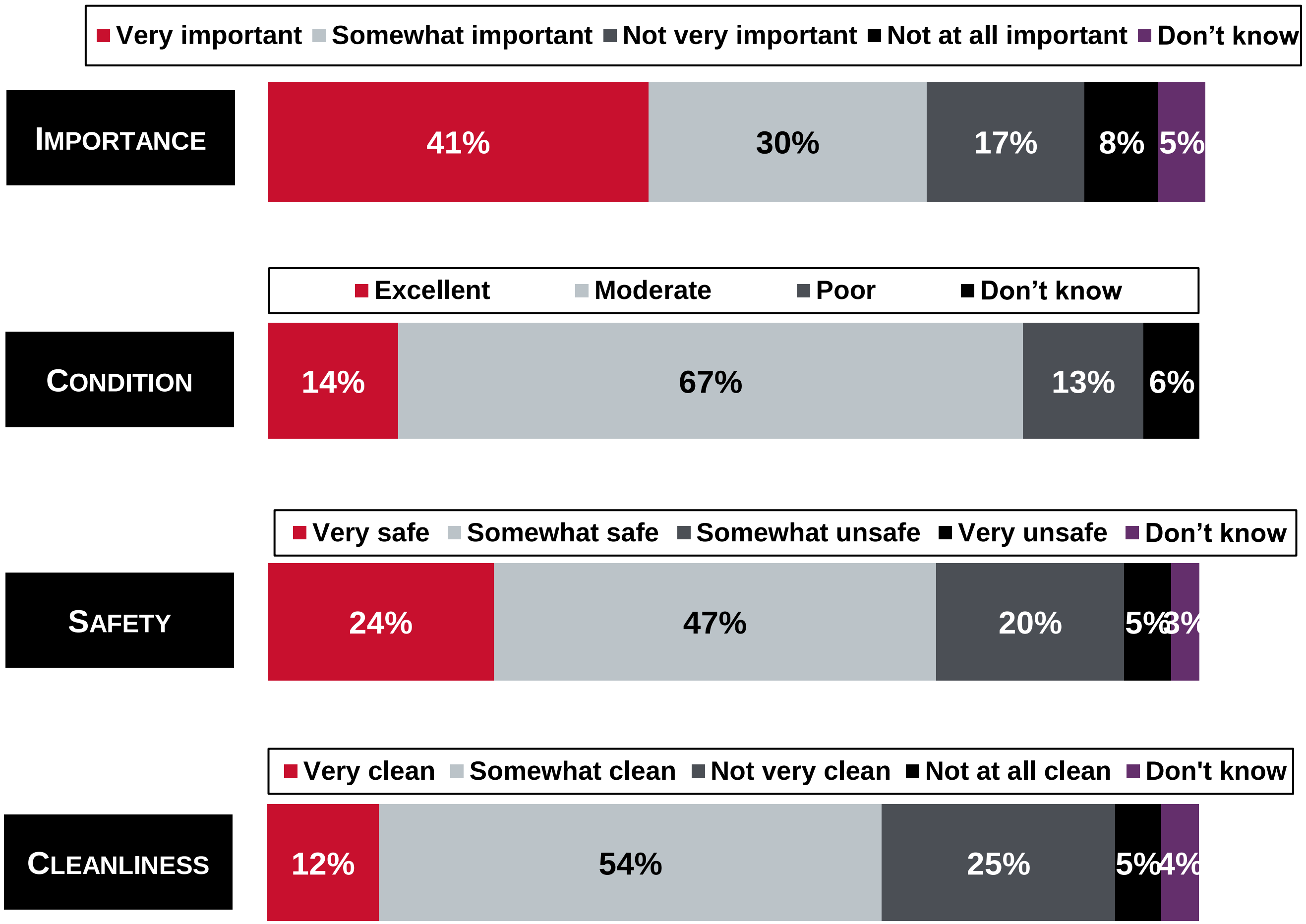
Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance for this item (Total: n = 980 / Live In: n=248 / Live Out Work In: n=314 / Live Out Work Out: n=418)

***Rounding**

Data labels <3% are not shown

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Summary I Downtown CPR Underpasses



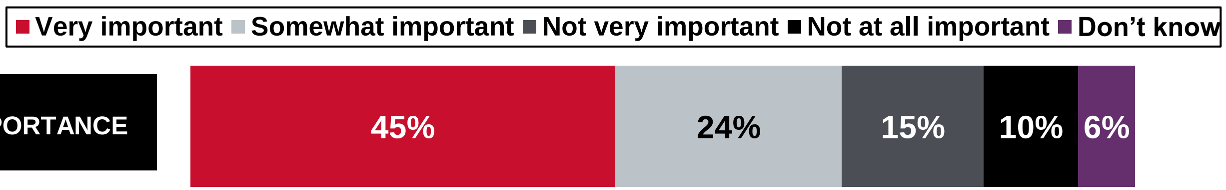
	TOTAL	Live In	Live Out Work In	Live Out Work Out
Very or Somewhat Important				
	71%	80%↑	75%	69%↓
Excellent Condition				
	14%	20%↑	14%	13%↓
Very or Somewhat Safe				
	71%	71%	69%	72%
Very or Somewhat Clean				
	66%	65%	58%↓	68%↑

Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance for this item (Total: n = 947 / Live In: n=243 / Live Out Work In: n=305 / Live Out Work Out: n=399)

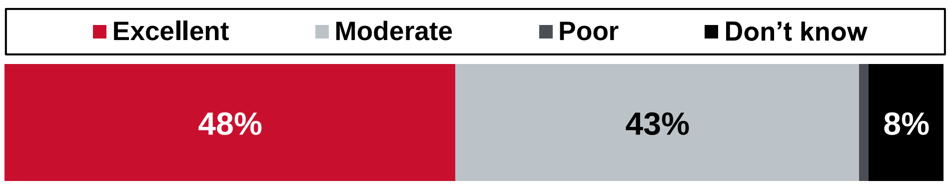
↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Summary I Downtown Plus 15 System

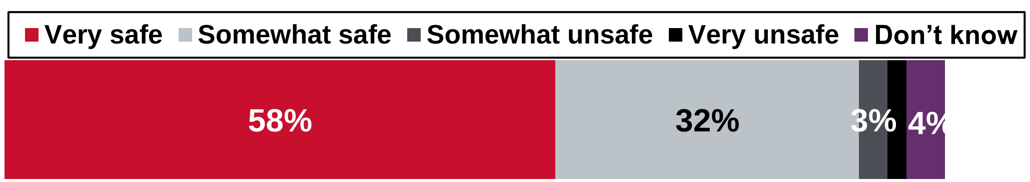
IMPORTANCE



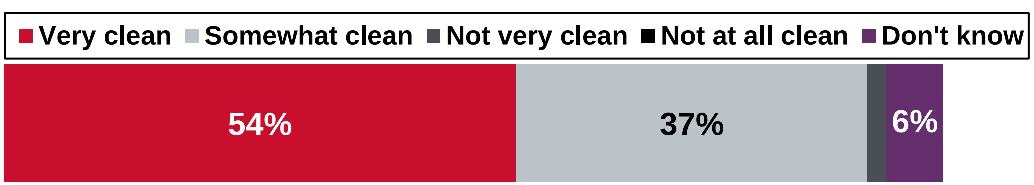
CONDITION



SAFETY



CLEANLINESS



	TOTAL	Live In	Live Out Work In	Live Out Work Out
Very or Somewhat Important	69%	67%↓	79%↑	66%↓
Excellent Condition	48%	51%	56%↑	45%↓
Very or Somewhat Safe	90%	90%	92%	90%
Very or Somewhat Clean	91%	90%	93%	90%

Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance for this item (Total: n = 939 / Live In: n=237 / Live Out Work In: n=307 / Live Out Work Out: n=395)

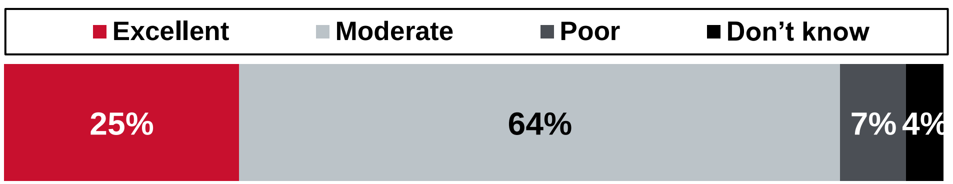
Data labels <3% are not shown

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

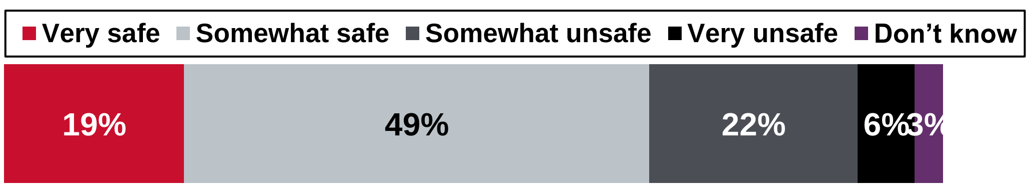
Summary I Downtown C-Train Stations

IMPORTANCE

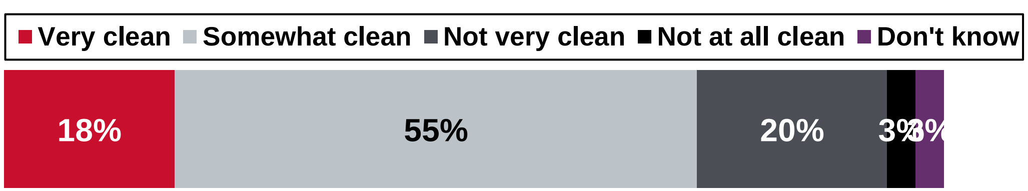
CONDITION



SAFETY



CLEANLINESS



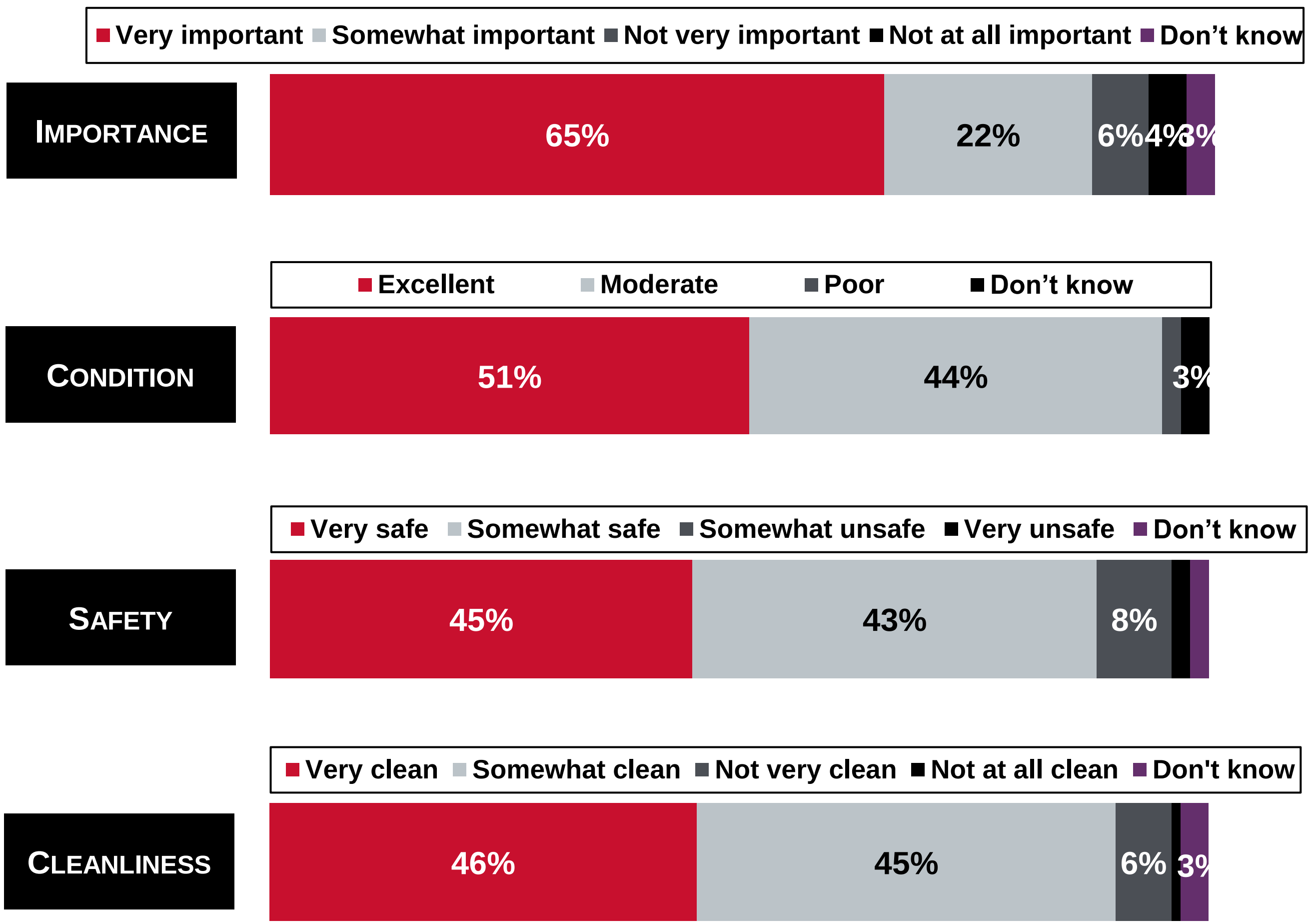
	TOTAL	Live In	Live Out Work In	Live Out Work Out
Very or Somewhat Important	82%	77%↓	84%↑	81%
Excellent Condition	25%	24%	26%	25%
Very or Somewhat Safe	68%	64%	63%↓	70%↑
Very or Somewhat Clean	74%*	72%	71%	74%

Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance for this item (Total: n = 951 / Live In: n=240 / Live Out Work In: n=309 / Live Out Work Out: n=402)

**Rounding*

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Summary I Downtown River Pathways



	TOTAL	Live In	Live Out Work In	Live Out Work Out
Very or Somewhat Important	88%*	86%	88%	88%
Excellent Condition	51%	51%	52%	50%
Very or Somewhat Safe	88%	87%	87%	88%
Very or Somewhat Clean	91%	92%	92%	91%

Base: Live downtown, work downtown or have gone downtown AND provided a rating for importance for this item (Total: n = 961 / Live In: n=241 / Live Out Work In: n=310 / Live Out Work Out: n=410)

**Rounding*

Data labels <3% are not shown

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Change in Downtown Safety and Cleanliness

Change in Downtown Safety and Cleanliness

Over the past year, the majority of Calgarians consider safety downtown to have remained the *same*; however, more Calgarians state that safety has worsened than in 2019. Additionally, those who experience downtown through living or working in the area are more likely to feel that safety has *worsened* in comparison to their live-out/work-out counterparts.

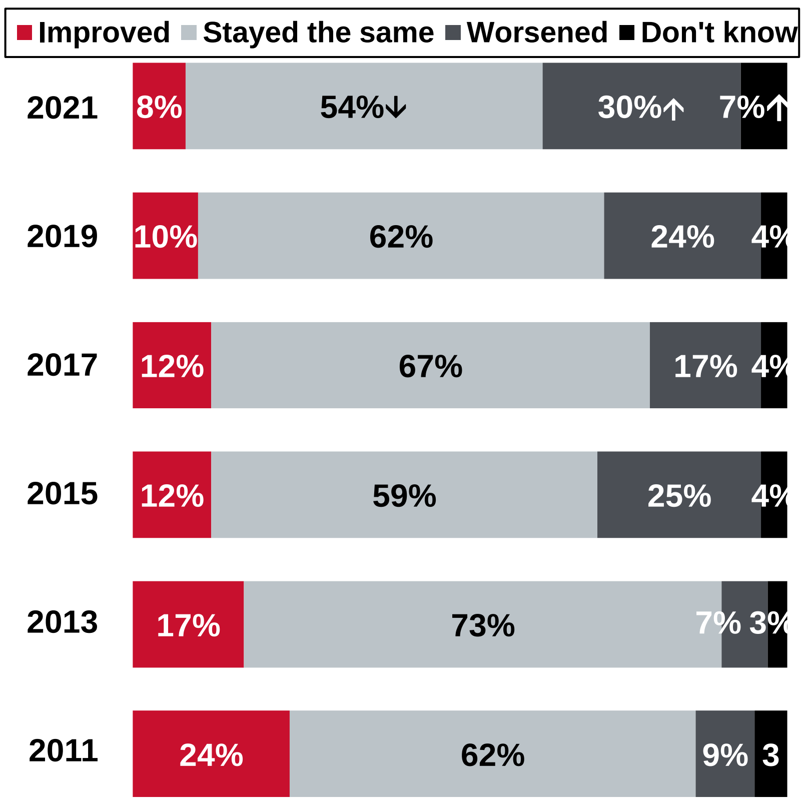
- The majority (54%) of Calgarians perceive the **safety** of the Greater Downtown area to have remained the *same* over the past 12 months (lower than 62% in 2019), and shows an increase in *worsened* ratings from 24% in 2019 to 30% in 2021.
  - Males (12% vs. 5% of females) are more likely to say that safety downtown has improved, as are those with a high school education or less (19% vs. 8% with some post-secondary and 5% with a university degree), and those with an annual household income of <$60K (14% vs. 6% with $150K+).
- Among those who feel that safety downtown has worsened, they cite the following main reasons: increased homelessness (35%); more assaults/violence/crimes (32%); drug addiction/substance abuse (25%); vagrants/'sketchy' people (15%); and, fewer people around (15%).

The proportion of residents feeling that cleanliness downtown has worsened has increased since 2017, yet the majority of Calgarians view cleanliness to have remained 'the same'.

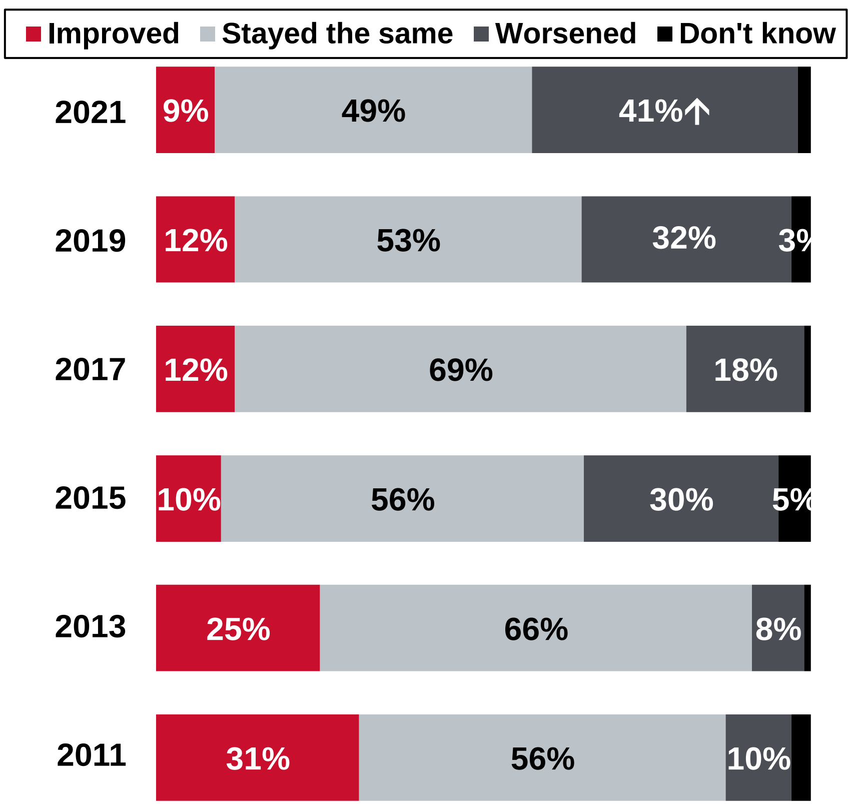
- More than six-in-ten (63%) Calgarians feel that **cleanliness** downtown has remained the *same* over the past 12 months, decreased from 69% in 2019. Further, 16% say it has *improved,* similar to 17% in 2019, and 13% say it has *worsened,* up from 9% in 2019.
  - Downtown residents (28%) and those who live out of downtown but work downtown (25%) are more likely to feel that cleanliness downtown has *worsened* over the past year in comparison to those who live and work outside of downtown (9%).
  - Those aged 35-54 (19% vs. 12% among those aged 55+) are more likely to say that the cleanliness of the downtown has improved, as are males (21% vs. 11% of females).

Perceived Change in Downtown Safety

All Respondents



Downtown Residents



Q12b. Thinking about the last 12 months, please tell me if you would say that safety in the downtown has improved, stayed the same or worsened?

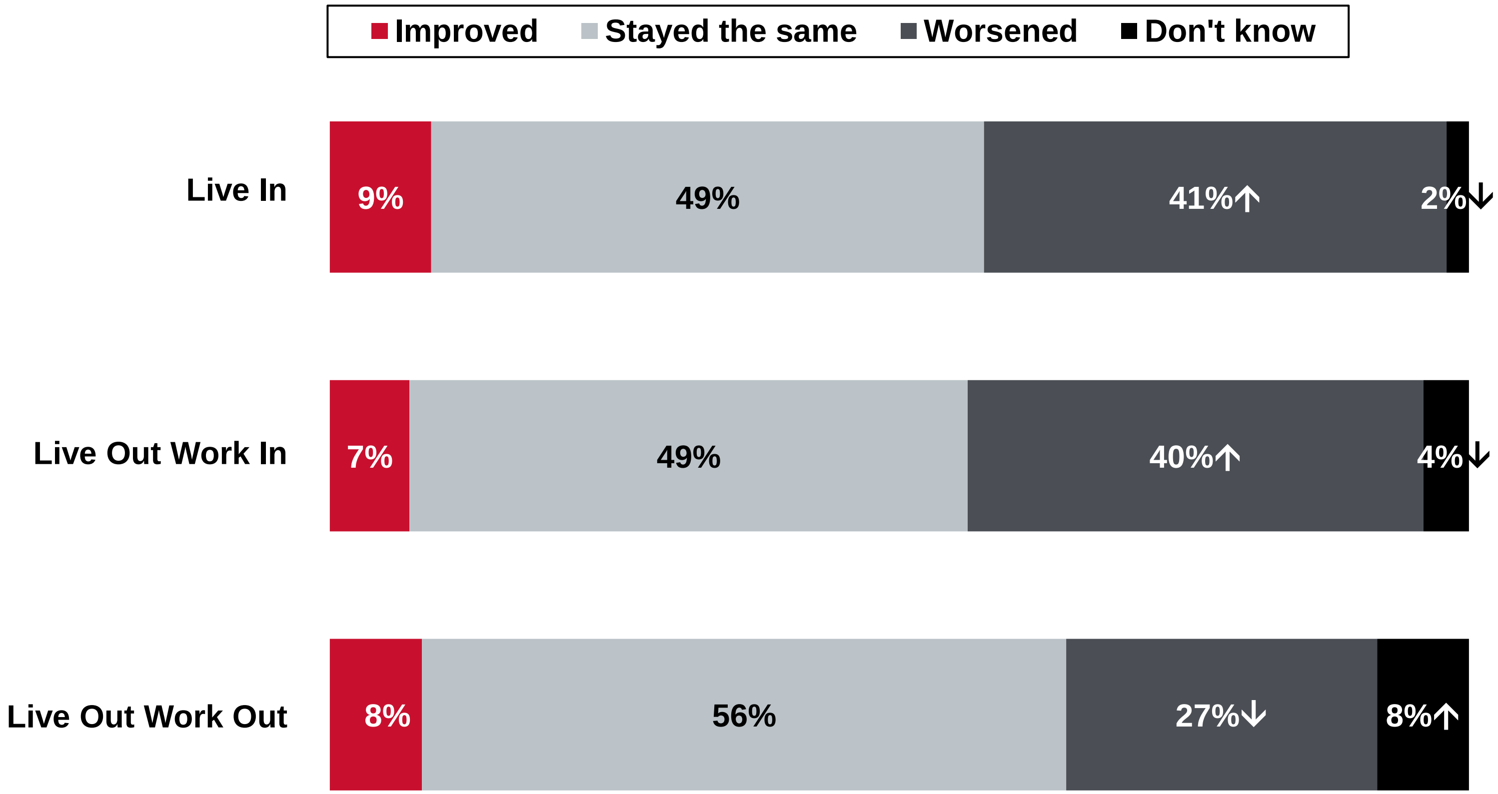
Base: All respondents 2021: (n=1021) / Prior years (n=1000)

Base: Downtown residents 2021: (n=250) / Prior years (n=300)

Data labels of <3% are not shown

↑ Statistically higher than 2019
↓ Statistically lower than 2019

Perceived Change in Downtown Safety
- By Live-Work Group -



Q12b. Thinking about the last 12 months, please tell me if you would say that safety downtown has improved, stayed the same or worsened?

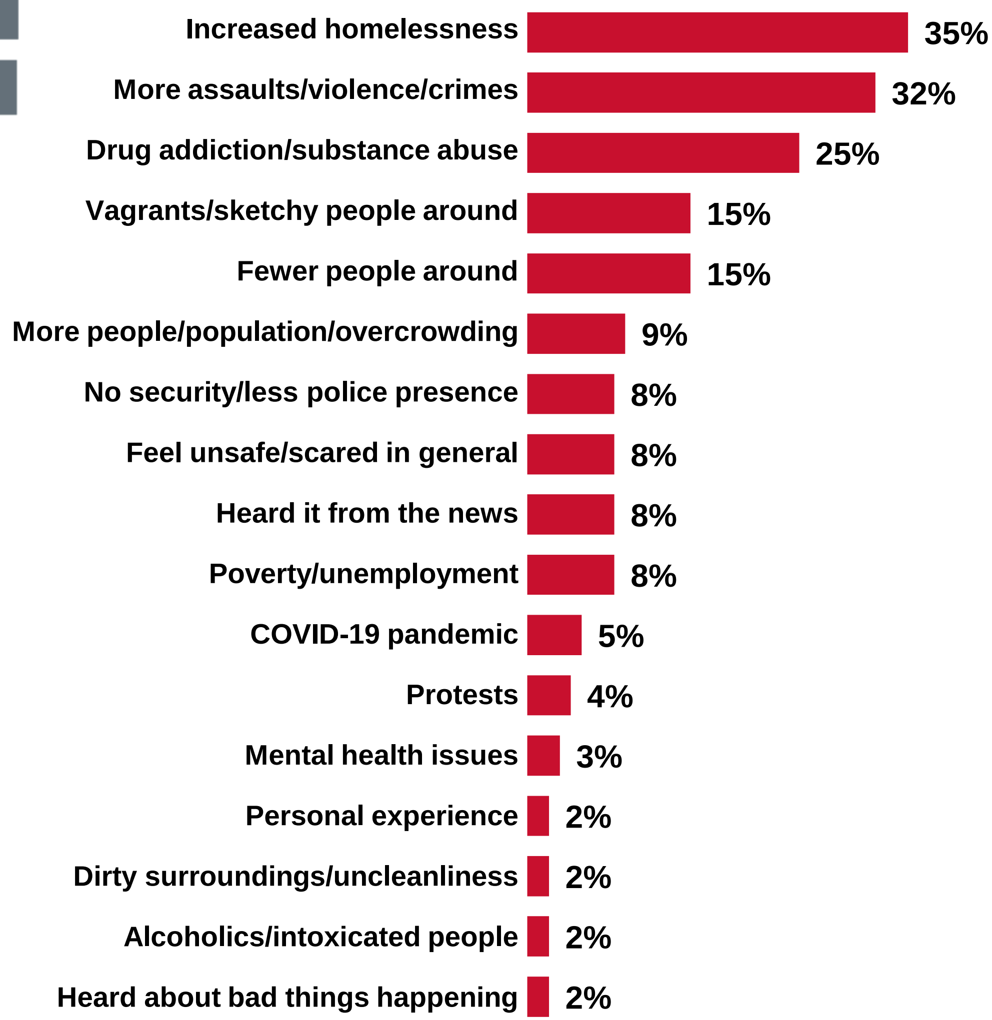
(Base: All respondents, n=1,021 – Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Reasons for Perceiving Safety Has Worsened

New question in 2021

Multiple Responses

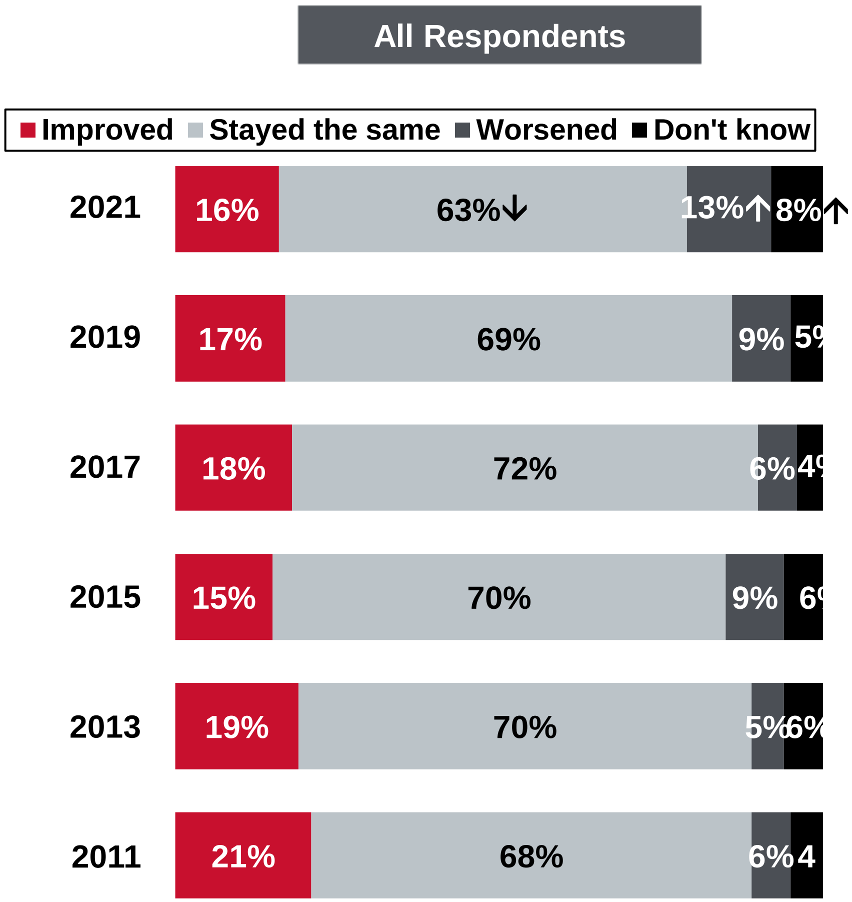


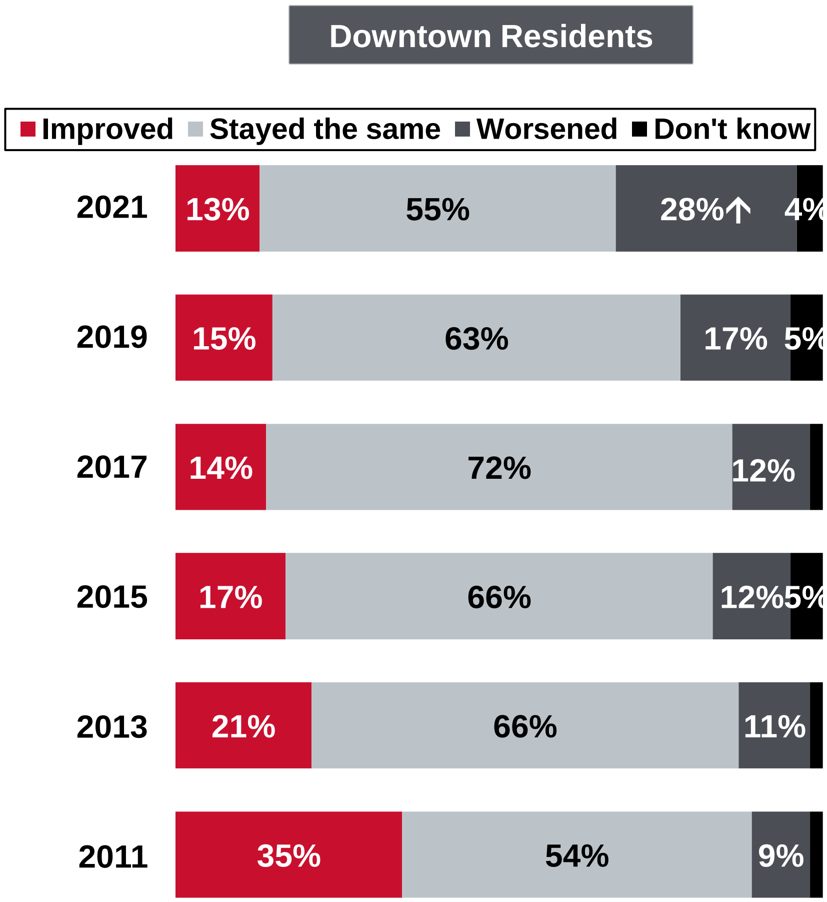
Q12C. And why do you say that safety in the Greater Downtown has worsened?

Base: Respondents who say that safety Downtown has worsened in the last 12 months (n=344)

Mentions of <2% not shown

Perceived Change in Downtown Cleanliness





Q8. In the last 12 months, would say the cleanliness downtown has improved, stayed the same or worsened?

Base: Live downtown, work downtown or have gone downtown (2021: n=987 /Prior years n=1000)

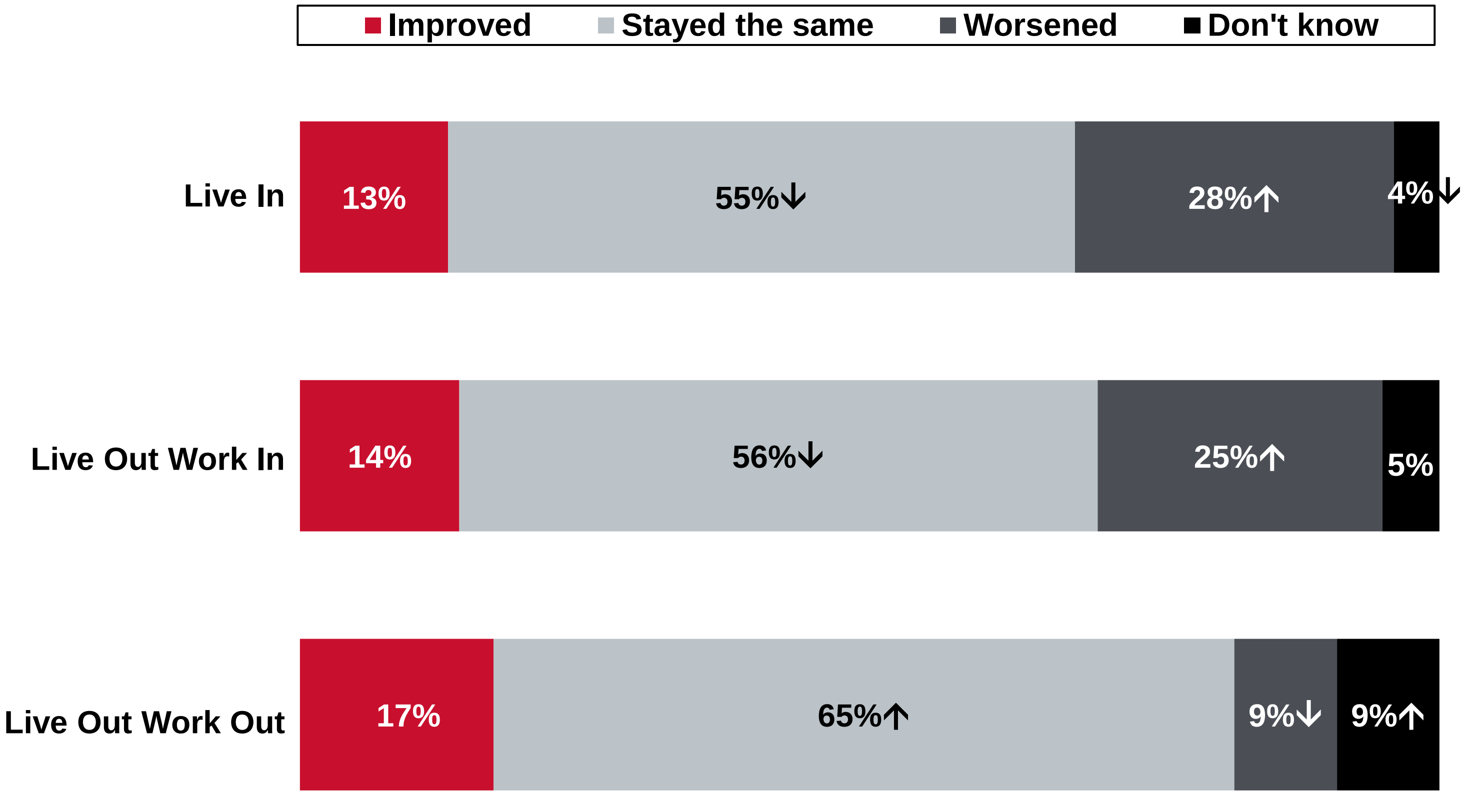
Base: Downtown residents 2021: (n=250) / Prior years (n=300)

Data labels of <3% are not shown

↑ Statistically higher than 2019
↓ Statistically lower than 2019

Perceived Change in Downtown Cleanliness

- By Live-Work Group -



Q8. In the last 12 months, would say the cleanliness in the downtown has improved, stayed the same or worsened?

Base: Live downtown, work downtown or have gone downtown (2021: n=987 / Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=422)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Living Downtown

Likelihood to Remain Living Downtown

The convenience of proximity to amenities, work and entertainment are key draws retaining downtown residents' desire to remain living downtown.

- Almost nine-in-ten (88%) current downtown residents indicate that they are likely to remain living downtown, similar to 90% in 2019, and including 66% who are *very* likely to remain living downtown, lower than 77% in 2019.
  - Those who are aged 55+ (95%) are more likely to remain living downtown than are those aged 18-34 (76%).
- The primary reasons for wanting to remain living downtown include: convenience of the central location (40%); proximity to stores and amenities (23%); proximity to work/school (21%); proximity to entertainment/nightlife (16%); it's 'home' and they like living there (16%); and, they own a property downtown (13%).
- Few (n=23) downtown residents say they are not likely to continue living downtown within the next three years. Given the small sample size, the following results are directional in nature.
  - Most commonly, downtown residents who intend to move out of the downtown area explain that they are moving or buying a home outside of downtown (30%); need more space/a bigger home (22%); are likely to move outside of downtown because of the high cost of housing and property taxes (17%); are concerned with crime and their personal safety (10%); or and, find it 'noisy' (10%).
- Among those who live outside of downtown, 29% report that they have previously lived in the Greater Downtown area. The main reasons that former downtown residents moved out of the area include: upgrading to a larger home (35%); getting married/starting a family (20%); high cost of housing and property taxes downtown (11%); concerns for crime and personal safety (8%); noise (6%); and, overpopulation/crowding/traffic (5%).

Likelihood to Move into Downtown

The likelihood of moving into downtown is low, although twelve percent of Calgarians represents a sizeable number of individuals.

- Slightly more than one-in-ten (12%) Calgarians who currently live outside of downtown state they are likely to move into downtown within the next three years.
  - The likelihood of moving downtown is identical among those who live outside of but work within the downtown area (12%) and those who live and work outside of downtown (12%).
  - Those notably more likely to move into downtown include citizens who rent (22%) vs. own their property (8%), those aged 18-34 (22% vs. 8% 35-54 and 6% 55+), those without children in the household (14% vs. 6% among those with children), and those with annual household incomes of <$60K (24% vs. 9% $60K-<$90K, 12% $90K-<$150K and 9% $150K+).

Those who currently live outside of downtown would be motivated to consider moving downtown if it was more affordable.

- **Motivational factors** to entice those who live outside of downtown to move into the Greater Downtown area primarily focus on having more affordable housing/rent downtown (22%), affordability in general (7%), followed by employment/jobs (7%), improved perceptions of crime, safety and policing (6%), and having more family-oriented amenities and activities (6%).
  - Further, 37% of residents who do not currently live downtown simply state that they would not live in the downtown area, thus not identifying any motivational factors which could possibly change their mind.

Initiatives to Make Downtown More Vibrant

Additional activities and services and improved affordability would make the Greater Downtown area a more vibrant area to live.

- Initiatives that could make downtown a more attractive place to live include offering more activities and services (32%), including increasing the variety of services and businesses (16%), offering more public activities and events (7%), providing more recreation facilities (6%), offering more family-friendly activities (4%), and placing a greater emphasis on arts and culture (4%).
  - Downtown could also be a more attractive place to live if it was more affordable (24%), if transportation and infrastructure was improved (17%), if crime, safety and policing was improved (17%), and if improvements to public spaces were made (16%).

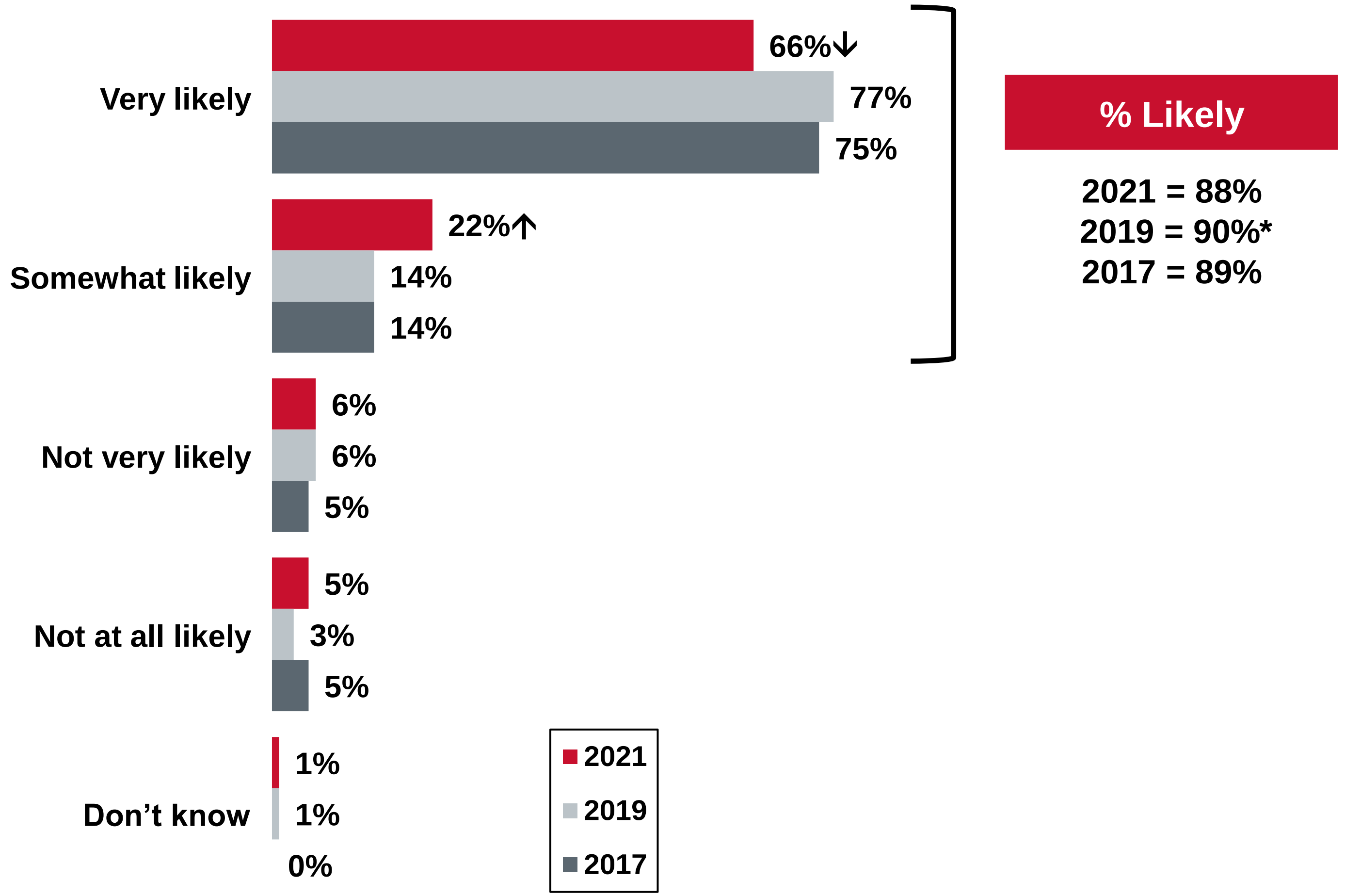
Additional activities and services and improved transportation and infrastructure would make the Greater Downtown area a more vibrant area to visit.

- Initiatives that could make the downtown a more attractive place to visit include offering more activities and services (38%), including more public activities and events (15%), increasing the variety of services and businesses (14%), placing a greater emphasis on arts and culture (8%), and providing more recreational activities (7%).
  - Downtown could also be a more attractive place to visit if transportation and infrastructure were improved (26%), if public spaces were improved (19%), if crime and safety were improved (14%), and if it was more affordable (9%).

Transportation and infrastructure and additional activities and services would also make the Greater Downtown area a more vibrant area to work.

- Initiatives that could make downtown a more attractive place to work focus on transportation and infrastructure (34%), including the provision of more affordable parking spots/free parking (15%), improving the availability of parking spots (9%), and improved public transit access (8%).
  - Downtown could also be a more attractive place to work if more activities and services were available (16%), if public spaces were improved (8%), if it was more affordable (8%), if crime, safety and policing were improved (7%), and if more employment opportunities were available (5%),

Likelihood to Remain Living Downtown



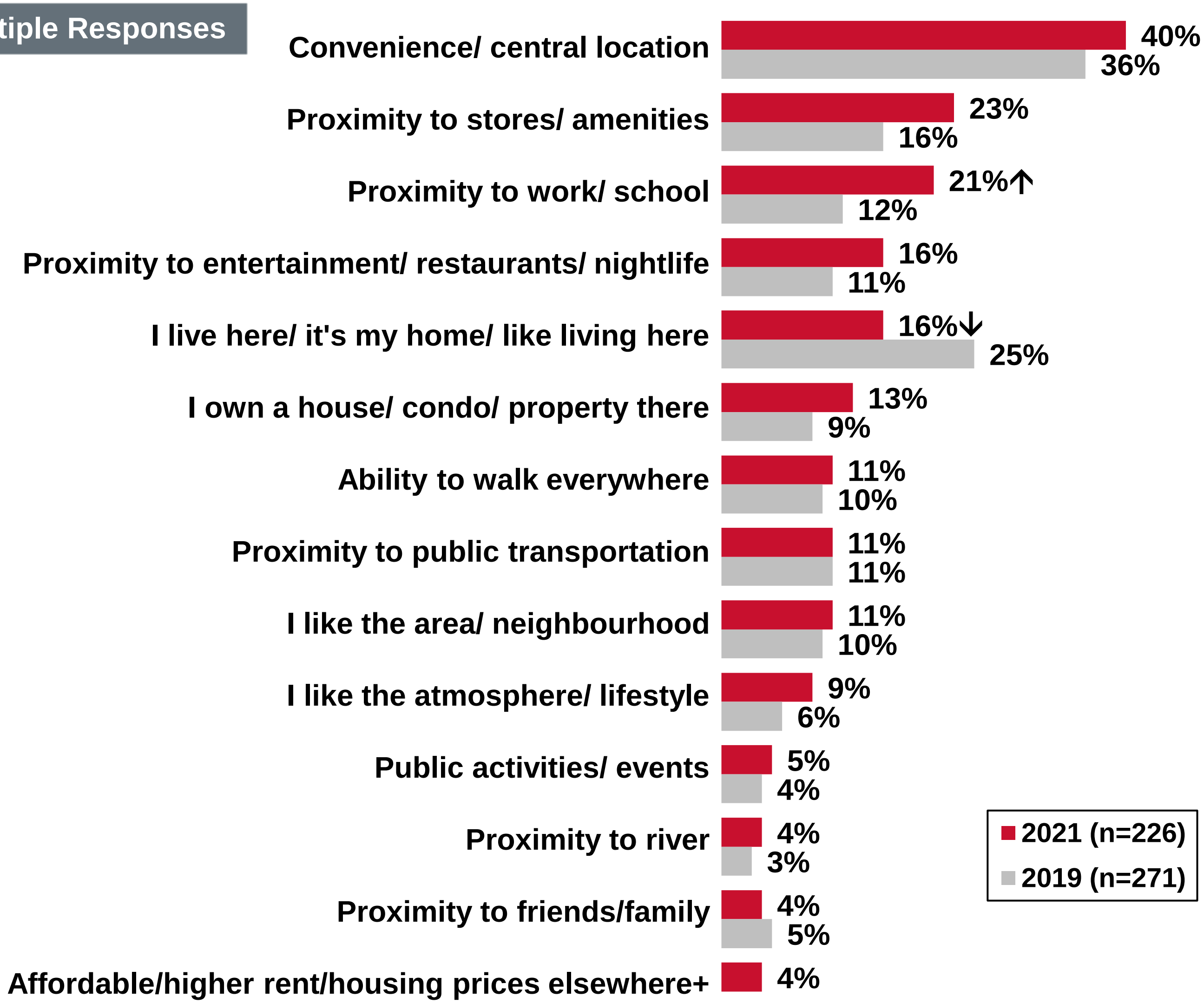
***Rounding**

↑ **Statistically higher than 2019**
↓ **Statistically lower than 2019**

Q13C. How likely are you to remain living downtown for at least the next three years?
(Base: Respondents who live downtown (2021: n=250 / 2019: n=300 / 2017: n=334)

Reasons for Continuing to Live Downtown

Multiple Responses



Mentions of <4% not shown

+Item did not show up as a unique category in 2019

↑ Statistically higher than 2019
↓ Statistically lower than 2019

Q13C1. What is the main reason you are likely to continue living downtown?

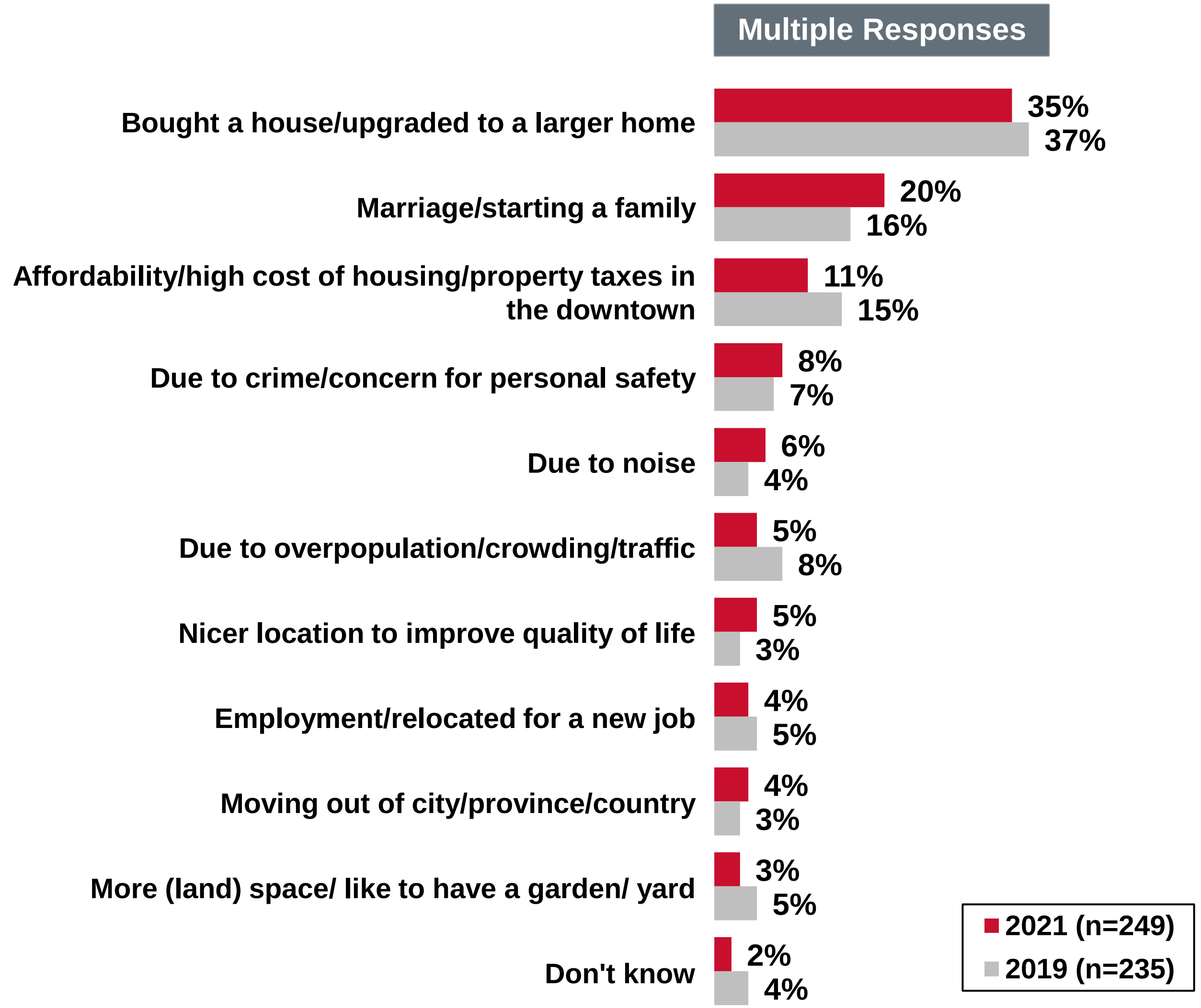
Base: Live In and very/somewhat likely to remain living downtown

Reasons for Moving Out of Downtown

- Former Downtown Residents -

Have you ever lived downtown?

2021 Yes: 29%
2019 Yes: 31%

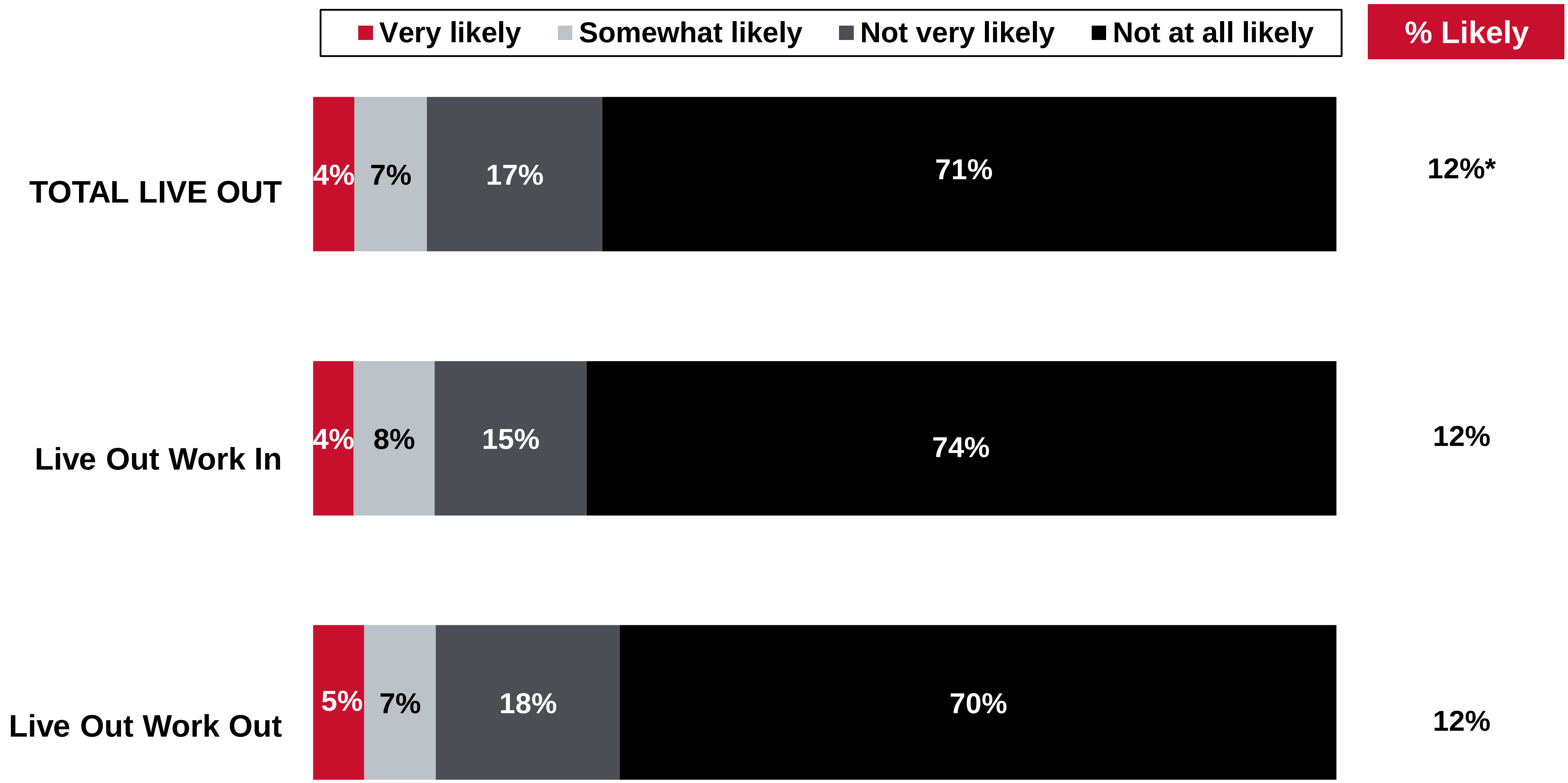


Q13H. What was your primary reason for moving out of downtown?

Base: Ever lived downtown, but not today

Mentions of <4% not shown

Likelihood of Moving Downtown
- By Live Out Groups -



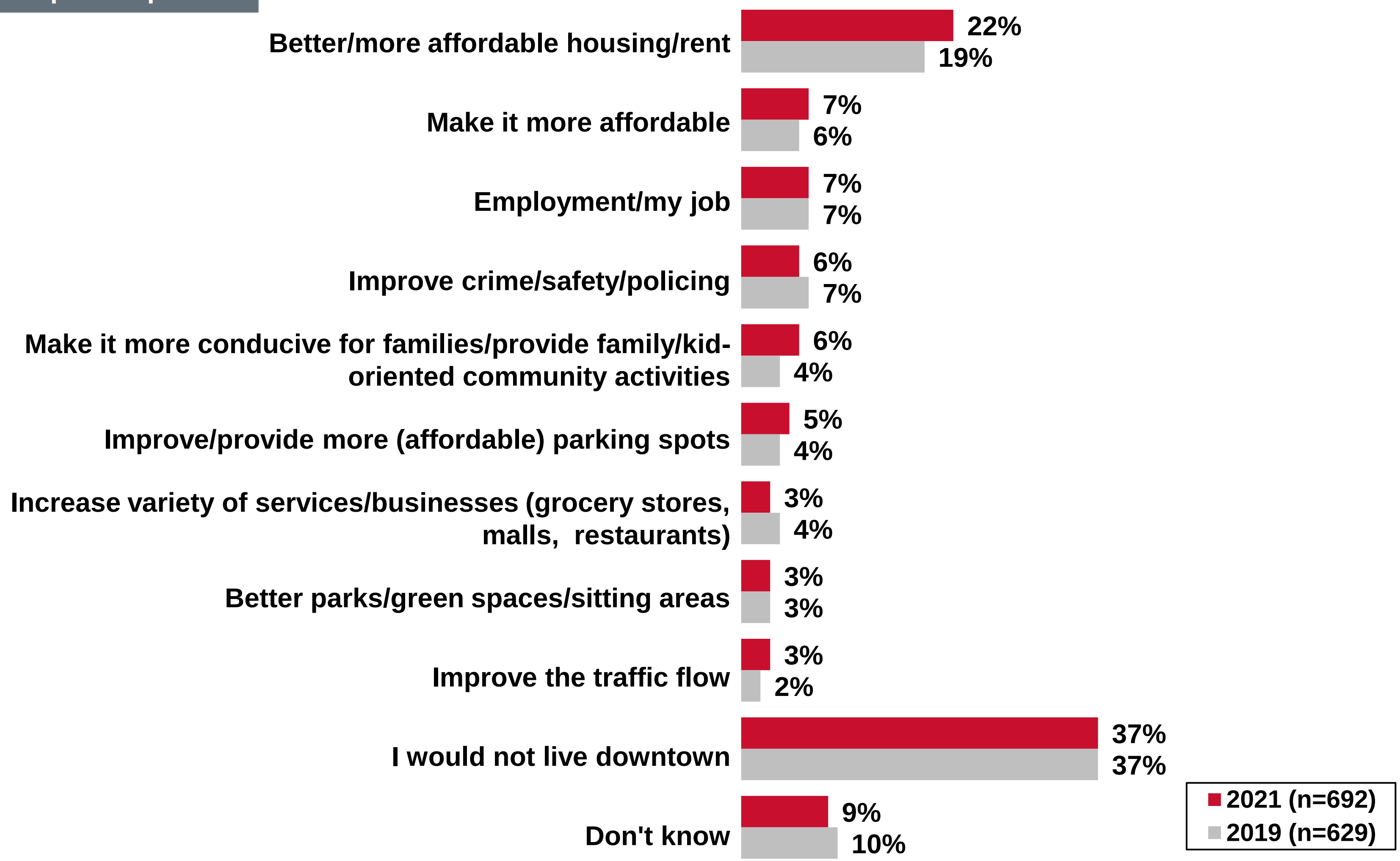
Q13E. In the next three years, how likely are you to move into downtown?

Base: Live Out: n=771 / Live Out Work In: n=315 / Live Out Work Out: n=456

Rounding

Factors Motivating Moves into Downtown

Multiple Responses



Q13F. What would motivate you to consider moving into downtown?

Base: Live Out and Not Likely to consider moving in

Mentions of <3% not shown

Initiatives to Make Downtown a More Vibrant Area to Live

Multiple Responses

	Total	Live In	Live Out Work In	Live Out Work Out
More Activities & Services (Net)	32%	33%	36%	31%
Increase variety/ diversity of services/ businesses	16%	20%	23%↑	15%↓
Public activities/ events (during evening/ weekends) to attract people	7%	7%	6%	8%
Recreational/ leisure/ sports facilities	6%	7%	8%↑	5%↓
Emphasize arts/ cultures/ beautification (planting, gardens)	4%	5%	3%	5%
Make it more conducive for families/ provide family	4%	2%	4%	4%
Affordability (Net)	24%	19%	21%	26%
Better/ more (affordable) housing/ rent	12%	10%	12%	13%
Make it more affordable (unspecified)	7%	2%↓	4%	8%↑
More diverse housing options	6%	2%↓	7%↑	6%↑
Crime, Safety & Policing (Net)	17%	18%	20%	16%
Safety/ security	11%	10%	11%	10%
Address homeless/ panhandlers/ vagrants	3%	6%↑	5%	3%↓
Reduce crime rate/ control criminal activities (drugs, prostitution)	3%	4%	4%	3%
Transportation & Infrastructure (Net)	17%	18%	17%	17%
Improve the availability of parking spots	5%	3%	4%	5%
Provide more affordable parking spots	4%	4%	5%	4%
Infrastructure/ construction works (roads, buildings)	3%	2%	2%	3%
Improve Public Spaces (Net)	16%	18%	21%↑	15%↓
Improve/ better parks/ green spaces	10%	8%	11%	9%
Cleanliness/ proper garbage disposals/ pickings	4%	5%	6%	4%
Provide more/ better sidewalks/ pedestrian/ bicycle lanes	3%	5%↑	5%↑	2%↓
None/ nothing	16%	16%	15%	16%
Don't Know	4%	3%	3%	5%

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

Total mentions <3% are not shown

Q18. What are the most important initiatives or changes that would make the downtown a more vibrant area to live – in terms of amenities? (Base: All respondents, n=1,021 – Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Initiatives to Make the Downtown a More Vibrant Area to Visit

Multiple Responses

	Total	Live In	Live Out Work In	Live Out Work Out
More Activities & Services (Net)	38%	45%	43%	37%
Public activities/ events (during evening/ weekends) to attract people	15%	19%	14%	15%
Increase variety/ diversity of services/ businesses	14%	24%↑	18%↑	12%↓
Emphasize arts/ cultures/ beautification (planting, gardens)	8%	11%	8%	8%
Recreational/ leisure/ sports facilities	7%	6%	10%	7%
Transportation & Infrastructure (Net)	26%	20%↓	32%↑	25%↓
Provide more affordable parking spots	9%	7%	11%	8%
Improve the availability of parking spots	9%	9%	10%	9%
Improve (public) transportation access (bus transit, c-train, vehicle)	5%	3%↓	9%↑	4%↓
Infrastructure/ construction works (roads, buildings)	5%	2%	5%	5%
Improve Public Spaces (Net)	19%	18%	20%	19%
Improve/ better parks/ green spaces/ sitting areas	11%	8%	11%	11%
Provide more/ better sidewalks/ pedestrian/ bicycle lanes	4%	6%↑	6%↑	3%↓
Cleanliness/ proper garbage disposals/ pickings	4%	5%	3%	4%
Crime, Safety & Policing (Net)	14%	12%	14%	15%
Safety/ security	8%	6%	8%	8%
Address homeless/ panhandlers/ vagrants	5%	5%	4%	5%
Affordability (Net)	9%	7%	8%	9%
Better/ more (affordable) housing/ rent	3%	2%	2%	3%
Make it more affordable	3%	2%	2%	3%
None/ nothing	16%	15%	16%	16%
Don't know	3%	1%	3%	3%

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

Total mentions <3% are not shown

Q18. What are the most important initiatives or changes that would make the downtown a more vibrant area to visit? (Base: All respondents, n=1,021 – Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Calgary

Multiple Responses

Initiatives to Make the Downtown a More Vibrant Place to Work

	Total	Live In	Live Out Work In	Live Out Work Out
Transportation & Infrastructure (Net)	34%	24%↓	32%	35%↑
Provide more affordable parking spots	15%	7%↓	16%↑	15%↑
Improve the availability of parking spots	9%	6%	9%	9%
Improve (public) transportation access (bus transit, c-train, vehicle)	8%	9%	8%	9%
More Activities & Services (Net)	16%	23%↑	24%↑	14%↓
Increase variety/ diversity of services/ businesses	12%	13%	17%↑	10%↓
Public activities/ events (during evening/ weekends) to attract people	3%	5%	3%	3%
Improve Public Spaces (Net)	8%	13%↑	10%	7%↓
Improve/ better parks/ green spaces/ sitting areas	4%	5%	4%	4%
Affordability (Net)	8%	7%	10%	7%
Better/ more (affordable) housing/ rent	3%	3%	4%	2%
Crime, Safety & Policing (Net)	7%	8%	10%	6%
Safety/ security	4%	4%	5%	4%
Accessibility (Net)	5%	4%	2%	5%
Better/ easier accessibility	4%	4%	2%	5%
Increase Employment/Job opportunities	5%	6%	3%	5%
None/ nothing	26%	23%	23%	28%
Don't know	6%	6%	3%	6%

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

Total mentions <3% are not shown

Q18. What are the most important initiatives or changes that would make the downtown a more vibrant area to work? (Base: All respondents, n=1,021 – Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Attitudes Towards Downtown

Attitudes Towards Downtown (1/3)

Calgarians express strong agreement that having a vibrant downtown is important to attracting new investment to Calgary though fewer Calgarians believe that 'downtown is the heart of Calgary' this year than in the past.

- The vast majority (92%) of Calgarians agree that "having a vibrant downtown is important to attracting new investment to Calgary" (similar to 93% in 2019, and including 65% who *strongly* agree in 2021), and that they "appreciate the walkability of downtown" (91%, consistent with 92% in 2019, and including 51% who *strongly* agree in 2021).
- As a new measure in 2021, 90% of Calgarians agree that "I feel safe walking alone downtown during the daytime", including 53% who *strongly* agree.
- As well, 80% agree that "revitalizing areas of Calgary's downtown should be a focus over the next five years (similar to 79% in 2019), and agreement is higher among downtown residents (92%) vs. those who live out and work outside of downtown (77%) and those who live out and work in downtown (85%).
- Next, 73% of Calgarians agree that there are "more amenities outside of downtown than inside downtown, higher than 67% in 2019, and downtown residents are less likely to agree (55%) vs. those who live out and work in downtown (75%) or those who live and work outside of downtown (74%).
- In addition, 72% agree that "downtown is the heart of Calgary", lower than 79% in 2019, which receives stronger agreement from downtown residents (83%) vs those who live out and work in downtown (73%) or those who live and work outside of downtown (70%).
- More than two-thirds (68%) of Calgarians "prefer suburban living to urban living" (similar to 66% in 2019), which is lower among downtown residents (31%) vs. those who live and work outside of downtown (72%) and those who live and work outside of downtown (64%).

Attitudes Towards Downtown (2/3)

In 2021, Calgarians are less likely to feel that 'downtown defines the identity of Calgary' and that 'downtown is a convenient meeting place to socialize'.

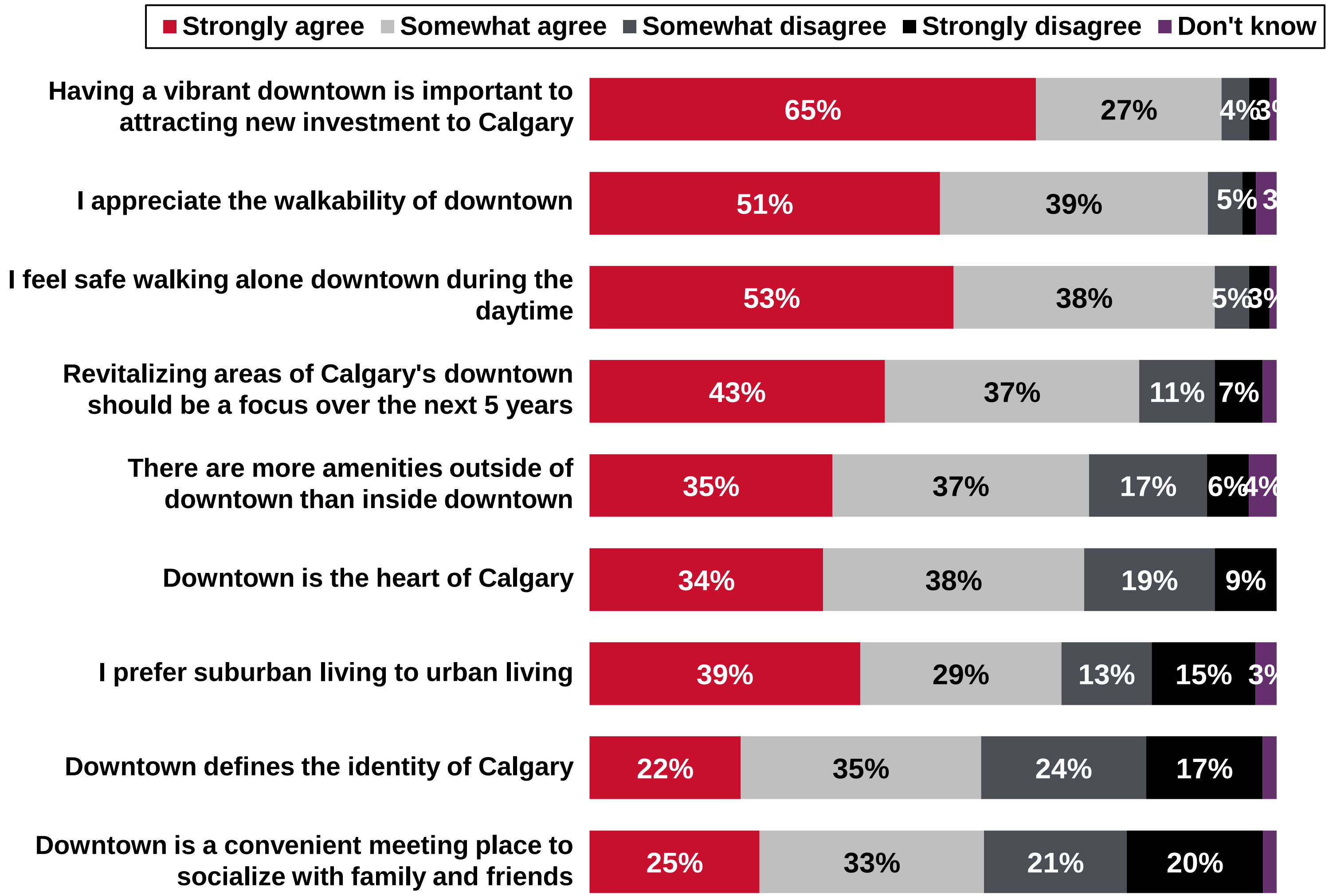
- More than half (57%) of citizens believe that "downtown defines the identify of Calgary", lower than 64% in 2019, and downtown residents are more likely to agree with this sentiment (71%) than are those who live out but work downtown (59%) or those who live and work outside of downtown (56%).
- Next, 57% agree that "downtown is a convenient meeting place to socialize with family and friends", lower than 64% in 2019, with downtown residents in higher agreement (80%) than those who live out but work in downtown (59%) or those who live and work outside of downtown (55%).
- More than one-half (56%) of Calgarians express similar views with respect to feeling that "there are a lack of recreational opportunities downtown", on par with 51% in 2019.
- Among those who live outside of downtown, 47% "would seriously consider living downtown if there were more diverse housing choices", consistent with 51% in 2019.
- Just under one-half (46%) of Calgarians agree that "it is too expensive to commute to downtown", similar to 44% in 2019. An identical proportion (46%) agree that "I would seriously consider living downtown if it was more affordable", on par with 50% in 2019
- As well, 44% agree that "the availability of parking downtown meets my needs", similar to 41% in 2019.

Attitudes Towards Downtown (3/3)

Only one in five Calgarians agree that 'the price of parking downtown is reasonable' and around one third 'feel safe walking alone downtown after dark' or that 'downtown is a desirable place for me to live'.

- More than one-third (36%) of Calgarians "feel safe walking alone downtown after dark" (not asked prior to 2021), and downtown residents (45%) and those who live outside of downtown but work downtown (42%) are more likely to agree than are those who live and work outside of downtown (34%).
- As well, 35% agree that "downtown is a desirable place for me to live", notably lower than 44% in 2019, and higher among downtown residents (86%) vs. those who live out and work in downtown (32%) and those who live and work outside of downtown (32%).
- Almost three-in-ten (29%) Calgarians agree that "it is too crowded and overpopulated downtown", lower among downtown residents (17%) and those who live out but work in downtown (19%) vs. those who live and work outside of downtown (33%).
- Finally, 19% agree that "the price of parking downtown is reasonable" (similar to 16% in 2019).

Attitudes Regarding Downtown (1/2)



% Agree		
2021	2019	2017
92%	93%	94%
91%*	92%	n/a
90%*	n/a	n/a
80%	79%	75%
73%*↑	67%	68%
72%↓	79%	81%
68%	66%	68%
57%↓	64%	n/a
57%*↓	64%	n/a

Q14. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.
(Base: All respondents (2021: n=1,021 / 2019 and 2017: n=1,000)

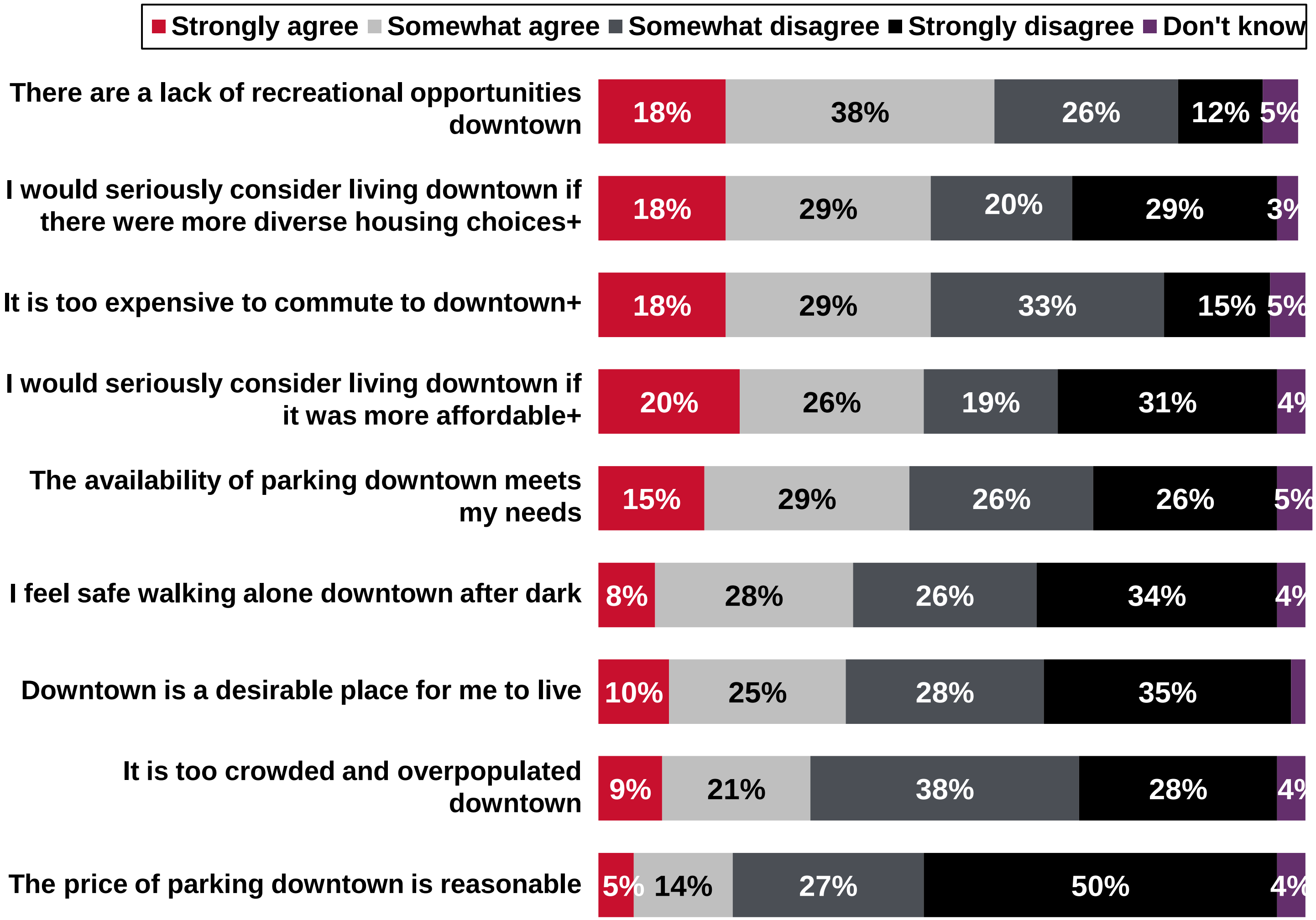
***Rounding**

Don't know includes not applicable and refused

Data labels <3% are not shown

↑ Statistically higher than 2019
↓ Statistically lower than 2019

Attitudes Regarding Downtown (2/2)



% Agree		
2021	2019	2017
56%	51%	n/a
47%	51%	55%
46%*	44%	n/a
46%	50%	53%
44%	41%	n/a
36%	n/a	n/a
35%↓	44%	42%
29%*	30%	n/a
19%	16%	n/a

+ Not asked of those living downtown

Data labels <3% are not shown

Q14. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.
(Base: All respondents (2021: n=1,021 / 2019 and 2017: n=1,000)

**Rounding*

Don't know includes not applicable and refused

↑ Statistically higher than 2019
↓ Statistically lower than 2019

Attitudes Regarding the Downtown (1/2)

- By Live-Work Group -

	% Agree			
	Total	Live In	Live Out Work In	Live Out Work Out
Having a vibrant downtown is important to attracting new investment to Calgary	92%	94%	92%	92%
I appreciate the walkability of downtown	91%	91%	92%	90%
I feel safe walking alone downtown during the daytime	90%	90%	89%	91%
Revitalizing areas of Calgary's downtown should be a focus over the next 5 years	80%	92%↑	85%↓↑	77%↓
There are more amenities outside of downtown than inside downtown	73%	55%↓	75%↑	74%↑
Downtown is the heart of Calgary	72%	83%↑	73%↓	70%↓
I prefer suburban living to urban living	68%	31%↓	64%↑↓	72%↑
Downtown defines the identity of Calgary	57%	71%↑	59%↓	56%↓
Downtown is a convenient meeting place to socialize with family and friends	57%	80%↑	59%↓	55%↓

Q14. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.
(Base: All respondents (Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Attitudes Regarding the Downtown (2/2)

- By Live-Work Group -

	% Agree			
	Total	Live In	Live Out Work In	Live Out Work Out
There are a lack of recreational opportunities downtown	56%	58%	54%	56%
I would seriously consider living downtown if there were more diverse housing choices+	47%	-	45%	48%
It is too expensive to commute to downtown+	46%	-	44%	47%
I would seriously consider living downtown if it was more affordable+	46%	-	43%	46%
The availability of parking downtown meets my needs	44%	45%	49%	43%
I feel safe walking alone downtown after dark	36%	45%↑	42%↑	34%↓
Downtown is a desirable place for me to live	35%	86%↑	32%↓	32%↓
It is too crowded and overpopulated downtown	29%	17%↓	19%↓	33%↑
The price of parking downtown is reasonable	19%	18%	17%	20%

+ Not asked of those living downtown

↑ Statistically higher than other live-work groups
↓ Statistically lower than other live-work groups

Q14. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.
(Base: All respondents (Live In: n=250 / Live Out Work In: n=315 / Live Out Work Out: n=456)

Key Driver Analysis:
Factors Influencing the Likelihood of Living Downtown

Summary I Key Driver Analyses

The Ipsos Bayes Net (IBN) Drivers Platform is an advanced key driver platform based on Bayesian statistics which allows us to understand the impact of factors on the likelihood of moving to the Greater Downtown area (among those who live outside of downtown) and the factors that will influence current downtown residents to remain living in the area.

Moving to the Greater Downtown I The most influential factors in encouraging Calgarians to move downtown include:

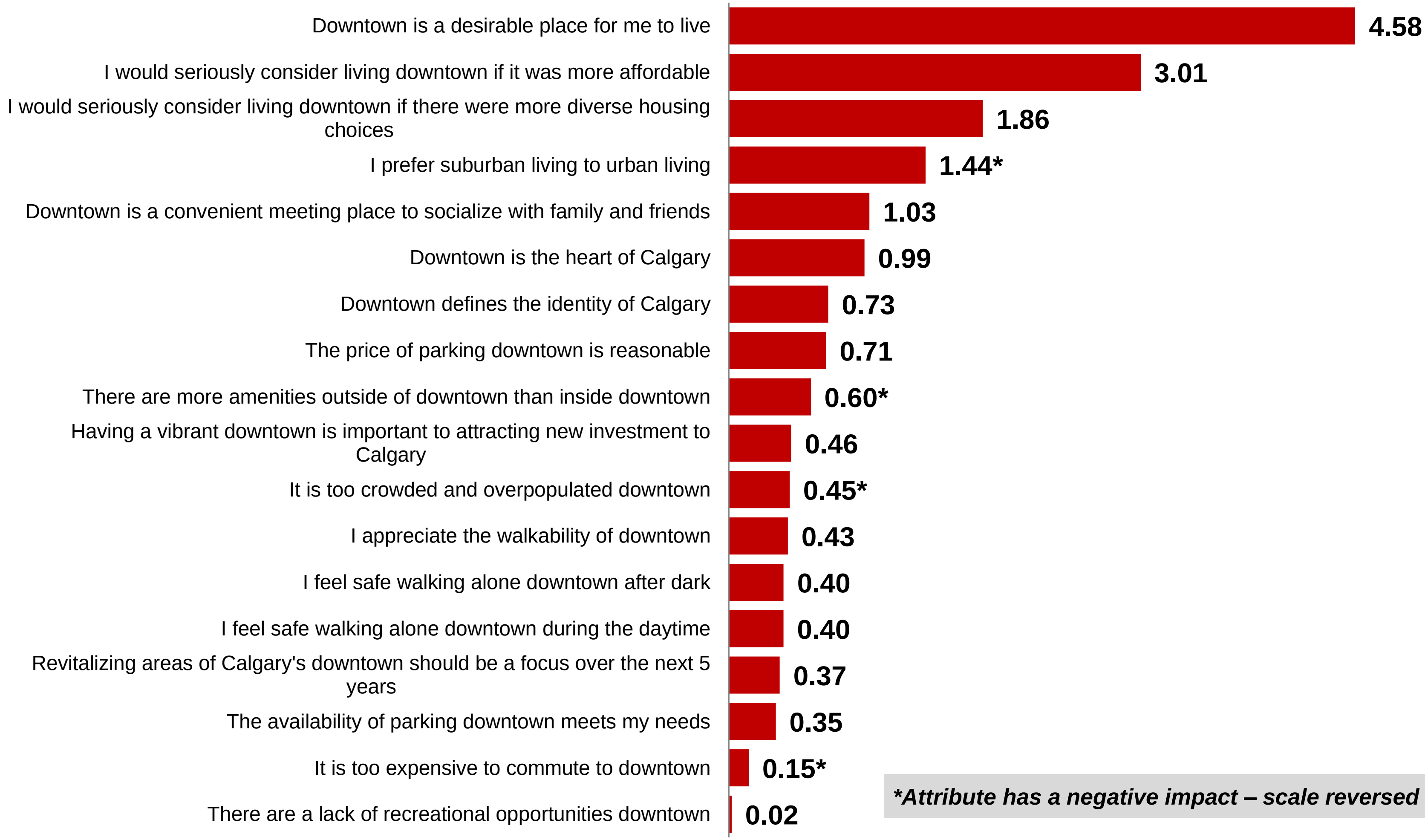
- Downtown being a “desirable” place to live;
- Downtown being an “affordable” place to live; and,
- Downtown offering a diverse array of housing choices.

Stay living in the Greater Downtown area I The most influential factors in encouraging current downtown residents to remain living downtown include:

- Downtown being a “desirable” place to live;
- Seeing downtown as the “heart of Calgary”; and,
- A preference for urban vs. suburban living.

Drivers I Live-Out Residents

The relative impact of each of the following factors upon the likelihood of Calgarians who live outside of downtown to move to the Greater Downtown area is presented below. The scores are all relative to the average impact among all attributes. In this case, the top attribute of 'downtown is a desirable place for me to live' has 4.58 times as much impact as an average attribute. The attribute of 'it is too crowded and overpopulated downtown' has less than half (0.45 times) as much impact as an average attribute.



Attribute has a negative impact – scale reversed in analysis

Drivers I Downtown Residents

The relative impact of each of the following factors upon downtown residents' likelihood of continuing to live in the Greater Downtown area is presented below. The scores are all relative to the average impact among all attributes. In this case, the top attribute of 'downtown is a desirable place for me to live' has 4.81 times as much impact as an average attribute. The attribute of 'it is too crowded and overpopulated downtown' has half (0.5 times) as much impact as an average attribute.

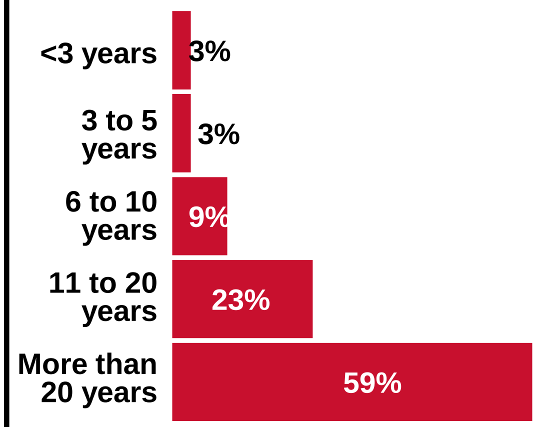
***Attribute has a negative impact – scale reversed in analysis**

Calgary

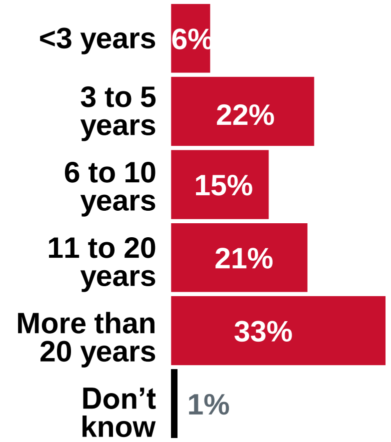
Respondent Profile

Respondent Profile

Tenure in Calgary

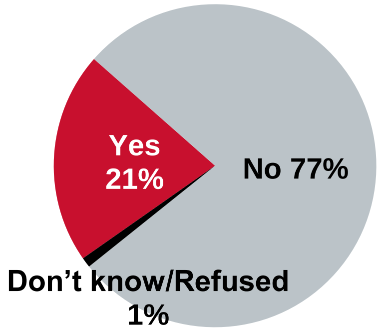


Tenure in the Greater Downtown

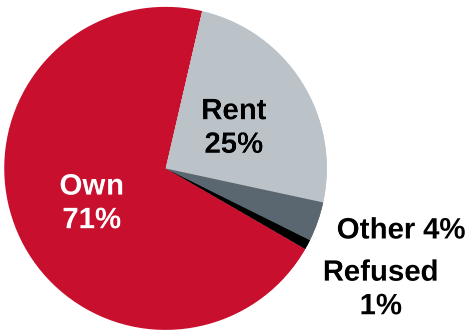


Downtown residents (n=250)

Consider Self a Person of Colour Racialized or Indigenous



Own or Rent

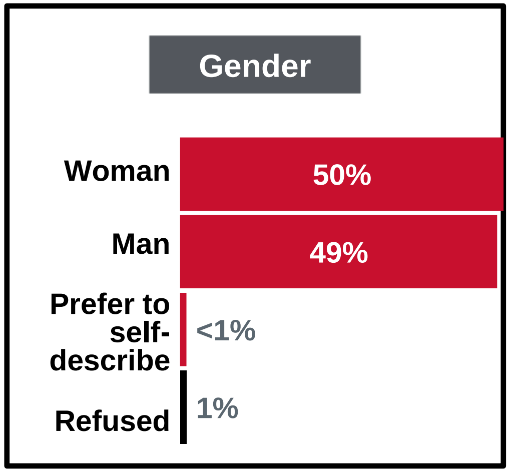


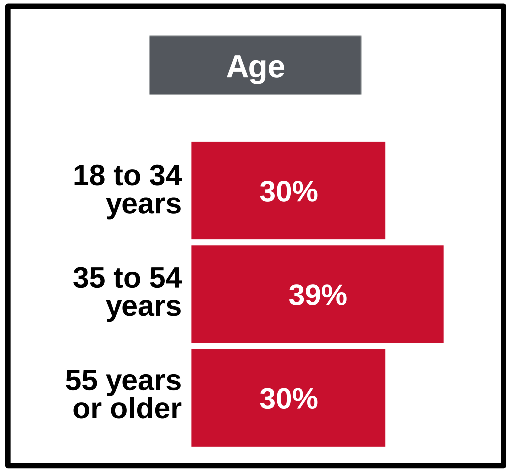
Children in Household

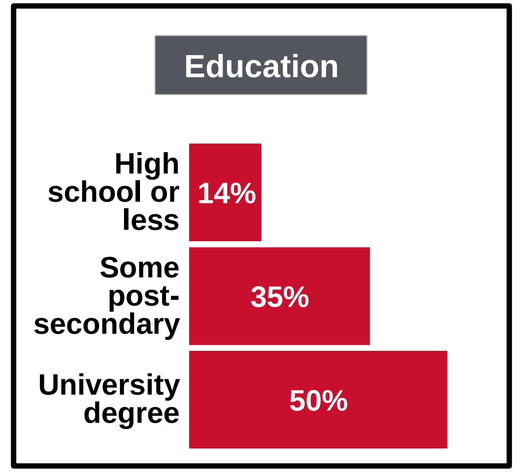
Yes	34%
No	66%

Base: All respondents (n=1,021)

Respondent Profile







Employment

Working full time	51%
Working part time	8%
Self-employed	9%
Not working and looking for work	5%
Not working and not looking for work	2%
A student	4%
Retired	16%
Unable to work	2%
Other	1%

Income

Less than $60,000	18%
$60,000 to just under $90,000	19%
$90,000 to just under $120,000	17%
$120,000 to just under $150,000	11%
$150,000 and over	25%
Don't know	1%
Refusal	8%

Base: All respondents (n=1,021)

Contact

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