



# 2024 Fall Survey of Calgarians

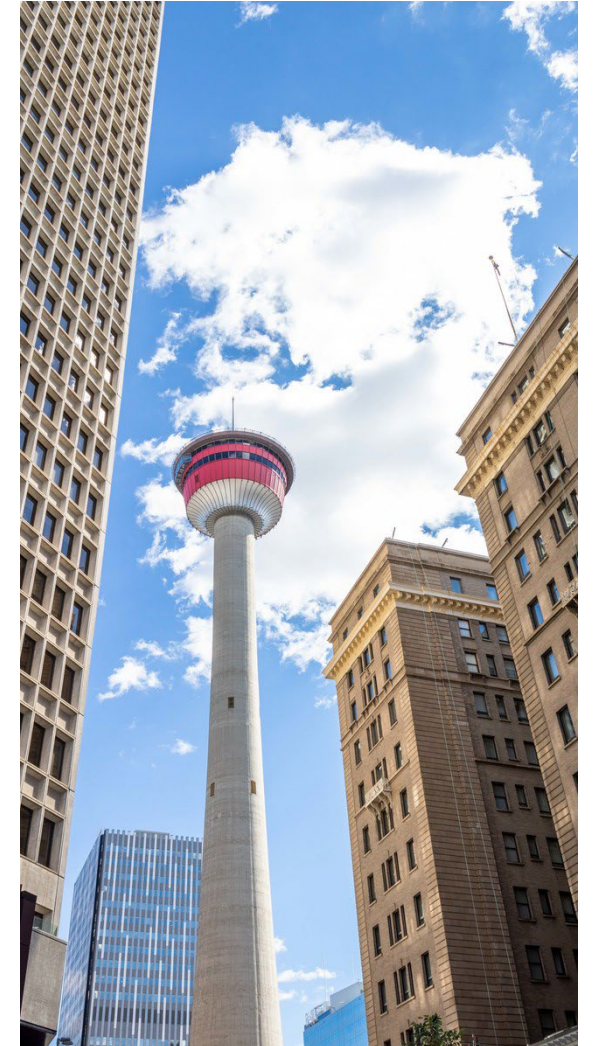
Final report

October 2024

Prepared by:



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## Methodology

- The survey was conducted by Ipsos Public Affairs from August 8, 2024 to September 3, 2024 with 2,500 Calgarians via telephone. The average time to complete the survey was 26 minutes.
- The survey was conducted using numbers from both cell phones (60%) and landlines (40%) to obtain a random and statistically-representative sample of Calgarians.
- The margin of error (MOE) for the total sample of n=2,500 is  $\pm 2.0$  percentage points, 19 times out of 20.
- To ensure the data was gathered from a representative group of Calgarians, sample quotas were set by age, gender, and ward of the general population aged 18 and older.
- Data were weighted based on the 2019 Municipal and 2021 Federal Census data for age, gender and quadrant to ensure composition reflects that of the actual Calgary population aged 18 or older. Although the results are weighted, the sample size shown for each question represents the number of actual respondents (i.e., unweighted n).

# Interpreting results

## Interpreting results

- Results are compared, where possible, with those of the 2023 Fall Survey of Calgarians (formerly the Fall Citizen Satisfaction Survey) and the 2024 Spring Survey of Calgarians (formerly the Spring Pulse Survey).
- Statistically significant changes from spring 2024 to fall 2024 or from fall 2023 to fall 2024 are noted:
  - ↑ indicates number is significantly higher than fall 2023/spring 2024
  - ↓ indicates number is significantly lower than fall 2023/spring 2024
- Some bar charts in this report do not add to 100% due to rounding.



# Fall highlights

# Fall highlights (1 of 3)

1. Two-thirds of Calgarians rate the current overall quality of life in Calgary as 'good,' although this sentiment has declined since fall 2023. While a majority still rate the current quality of life positively, there is a growing perception that it has deteriorated over the past three years, with nearly two-thirds feeling the quality of life has 'worsened' during this period.
2. Seven-in-ten Calgarians believe that Calgary is a great place to make a life, and more than three-fifths agree it is a great place to make a living. Although these positive perceptions experienced a decline in spring 2024 compared to fall 2023, they have since stayed stable.
3. 'Infrastructure, traffic, and roads' tops the issue agenda, showing increased importance since spring 2024. The economy, particularly housing affordability and the cost of living, holds the second spot, maintaining its importance. The remaining top issues have each received fewer mentions compared to spring 2024 – 'homelessness, poverty, and affordable housing' now ranks third, followed by 'crime, safety, and policing', with 'transit' rounding out the top five priorities. Mentions of the water main repairs and infrastructure also climb high in sixth spot.
4. Three-fifths believe Calgary is on the right track to be a better city in 10 years, but this optimism has decreased since 2023. When considering Calgary's long-term future beyond the next decade, residents are less confident, with nearly two-fifths believing the city is moving in the right direction to ensure a high quality of life for future generations.
5. Three-quarters of residents consider Calgary to be 'safe' overall, an improvement from fall 2023 and returning to levels seen in 2022. But Calgarians are divided on neighbourhood crime trends. Looking back on the past three years, two-fifths believe that crime has 'increased,' while one-half believe it has 'stayed the same.' Looking ahead three years, opinions are similarly split, with more than two-fifths predicting a rise in neighbourhood crime and one-half expecting it will stay the same.
6. Satisfaction with the overall quality and level of services provided by The City of Calgary remains positive, with more than three-fifths satisfied, consistent with spring 2024 but still down from fall 2023. Satisfaction remains high for waste management but has declined this wave for water services, roads, and traffic flow.
7. Perceived value for taxes remains divisive. More than two-fifths feel they are getting good value for property tax dollars, consistent with spring 2024 but lower than fall 2023. When it comes to balancing taxation and service delivery levels, Calgarians are divided, with no clear consensus on whether to increase taxes or cut services.

## Fall highlights (2 of 3)

7. Trust in The City of Calgary remains steady at two-fifths. Satisfaction with the performance of City Administration sits at more than three-fifths, while just under one-half are satisfied with City Council performance. These results are down compared to 2023.
8. Calgarians' perceptions of The City's openness, responsiveness, accessibility, and financial management have declined over the past year. More than one-half believe The City practices open and accessible government, a drop from prior waves. Additionally, only one-half feel The City uses Calgarians' input in decision making, a decline from spring 2024.
9. The vast majority of Calgarians agree that market housing is prohibitively expensive for the average Calgarian. Only three-in-ten believe all Calgarians currently have access to adequate market housing. Accordingly, there is strong support for The City to explore ways to make home ownership more achievable and to invest more in affordable housing, prioritizing low-income and Indigenous Calgarians.
10. Around nine-in-ten Calgarians agree The City should invest more to address transit safety. This is underscored by the fact that currently, only one-half of Calgarians would feel safe riding a bus alone at night, and even fewer would feel safe riding the CTrain alone at night. In addition to safety concerns, Calgarians also prioritize transit service improvements, with nine-in-ten viewing the expansion of CTrain service to the airport as important.
11. The majority of Calgarians generally feel safe using The City's pathways and bikeways, and around three-quarters agree these amenities encourage active transportation. Despite these positive perceptions, relatively fewer Calgarians, two-thirds, feel that The City offers sufficient transportation alternatives to driving.
12. Downtown revitalization remains a priority for Calgarians, with strong majorities agreeing The City needs to address safety issues downtown and that a vibrant core is crucial for investment. Most see downtown as the heart of Calgary, but only one-half consider it a convenient social destination. Support is high for The City to invest more in downtown infrastructure.



## Quality of life

Calgary is a great place to make a life



Good quality of life



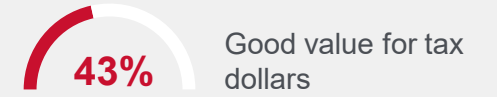
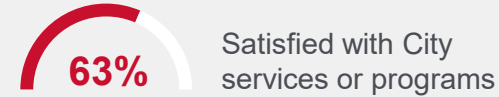
Calgary is a great place to make a living





Calgary is on the right track to be a better city in 10 years



## Value for taxes and satisfaction with services and programs



## Issue agenda (top mentions)

-  **35% ↑** Infrastructure, traffic and roads
-  **18%** Economy
-  **17% ↓** Homelessness, poverty and affordable housing
-  **16% ↓** Crime, Safety and Policing
-  **14% ↓** Transit

## City reputation and performance

-  **56% ↓** Agree City practices open and accessible government
-  **53% ↓** Satisfied with running of the city by Council and Administration
-  **41%** Trust The City of Calgary

↑/↓ Statistically higher/lower than spring 2024





# Quality of life

# Summary of findings: Quality of life

**Quality of life ratings are declining, with a many feeling that quality of life has worsened over the past three years. The long-term picture for Calgary's path is mixed, with things looking brighter in the immediate future but less so for future generations.**

- Perceptions of quality of life among Calgarians have declined in recent waves. Two-thirds (66%) of Calgarians rate the overall quality of life in Calgary as 'good' in fall 2024, statistically lower than spring 2024 (71%) and fall 2023 (76%).
- This sentiment is further reflected in Calgarians' assessment of the change in quality of life over the last three years. Nearly two-thirds (64%) feel that the quality of life in Calgary has 'worsened' during this time, consistent with spring 2024 (62%) but statistically higher than fall 2023 (59%). One-in-ten (9%) believe that the quality of life has 'improved,' on par with spring 2024 (7%) and fall 2023 (10%).
- Seven-in-ten (70%) Calgarians hold the view that 'Calgary is a great place to make a life,' on par with spring 2024 (69%) but still statistically lower than fall 2023 (75%). Similarly, more than three-fifths (63%) agree that 'Calgary is a great place to make a living,' identical to spring 2024 (63%) but also still statistically lower than fall 2023 (70%).
- Looking ahead, three-fifths (61%) of Calgarians agree with the statement 'Calgary is on the right track to be a better city 10 years from now.' While most Calgarians are still optimistic about the city's future, this is statistically lower than both the spring 2024 (65%) and fall 2023 (70%) and represents the lowest point since this statement was first tracked.
- When considering Calgary's future beyond the next decade, Calgarians are even less certain. Nearly two-fifths (38%) agree that 'Calgary is moving in the right direction to ensure a high quality of life for future generations,' identical to 38% in both spring 2024 and fall 2023. While stable over the past three waves, this remains considerably lower than in years prior.

# Summary of findings: Civic pride and community involvement

## **Calgarians maintain strong civic pride despite gradual declines over time. Being proud to live in one's neighbourhood remains high.**

- Neighbourhood pride remains strong and consistent. Four-fifths (80%) agree that they are 'proud to live in their neighbourhood,' statistically unchanged from fall 2023 (81%).
- A similar sense of pride extends to being a Calgarian, with around three-quarters (77%) agreeing that they are 'proud to be a Calgarian.' While this sentiment is largely positive and is on par with fall 2023 (79%), over a longer timeframe there has been a slight declining trend.

# Summary of findings: Inclusivity

**While there has been an increase in recognition of The City's efforts to promote inclusivity, Calgarians are still divided on whether the city is safe for everyone and whether there are programs and services that remove barriers to participation.**

- Since spring 2024, Calgarians' opinions of The City's initiatives to promote inclusivity have shown improvement. Around two-thirds (68%) agree that 'The City of Calgary fosters a city that is inclusive and accepting of all,' a sentiment that is statistically higher than spring 2024 (62%) and returns to levels on par with fall 2023 (67%).
- There is still a relatively low level of agreement that The City delivers programs and services to remove participation barriers for those most in need. Around one-half (46%) agree with this statement, unchanged from spring 2024 (46%) and on par with fall 2023 (48%).
- Likewise, one-half (50%) of Calgarians agree that Calgary is safe for residents and visitors alike (regardless of factors such as ethnicity, race, religion, income, or sexual identity) which is on par with fall 2023 (47%). This statement is measured during fall waves only.

# Summary of findings: Environment

**The City's environmental initiatives are gaining recognition, but still only half of the population is aware of them.**

- There has been a modest improvement in Calgary residents' awareness of The City's environmental initiatives. One-half (51%) agree that 'The City has programs and services aimed at helping Calgarians reduce their environmental impact,' a statistically significant increase from fall 2023 (47%) and a return to the level observed in fall 2022 (51%).

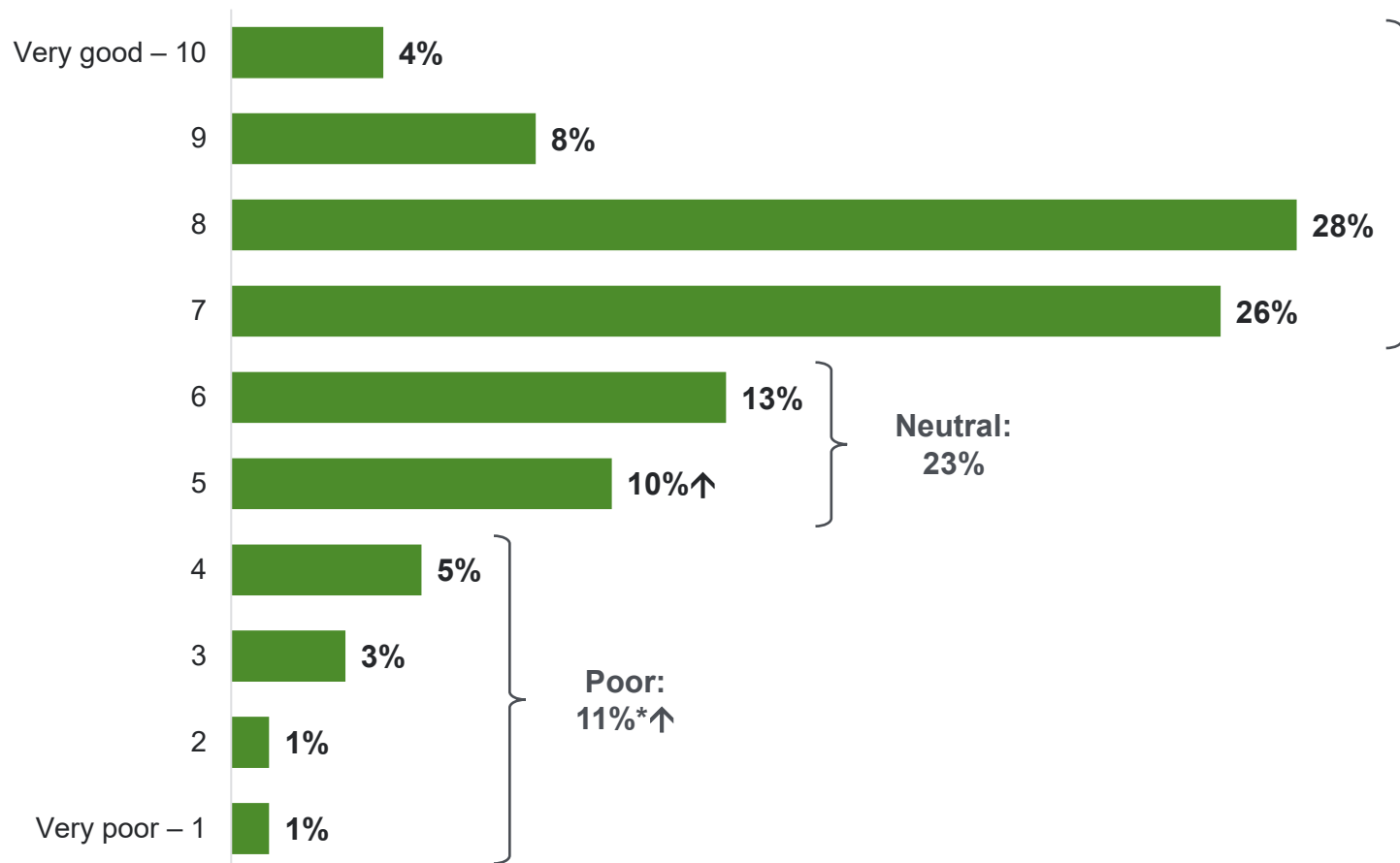
# Summary of findings: Safety

## The overall view of Calgary being a safe city is improving, while opinions are divided on crime trends at the neighbourhood level.

- Calgarians' overall perceptions of safety in their city have improved statistically, with three-quarters (75%) now describing Calgary as 'safe,' up from fall 2023 (69%) and returning to levels observed in fall 2022 (77%).
- When it comes to neighbourhood crime over the past three years, there has also been a positive shift in attitudes albeit opinions remain mixed. This wave, fewer Calgarians believe that neighbourhood crime has 'increased,' (41%) a statistical decline from fall 2023 (46%). One-half (51%) feel that neighbourhood crime has 'stayed the same,' a slight increase from fall 2023 (47%). Fewer than one-in-ten (5%) believe that crime has 'decreased,' similar to fall 2023 (4%).
- Calgarians are also split in their predictions about neighbourhood crime in the next few years. In a new question introduced in fall 2024, more than two-fifths (44%) expect crime to 'increase' over the next three years, while one-half (49%) believe it will 'stay the same.' Fewer than one-in-ten (6%) expect crime to 'decrease' over this period.
- Despite these mixed perceptions about neighbourhood crime trends, around three-quarters (77%) of Calgarians still agree that they do feel safe or would feel safe walking alone in their neighbourhood after dark, this level of comfort is consistent with fall 2023 (76%).



# Overall quality of life in Calgary



Q. On a scale of 1 to 10 where 1 is very poor and 10 is very good, how would you rate the overall quality of life in the city of Calgary today?  
Base: Valid respondents (n=2,497)

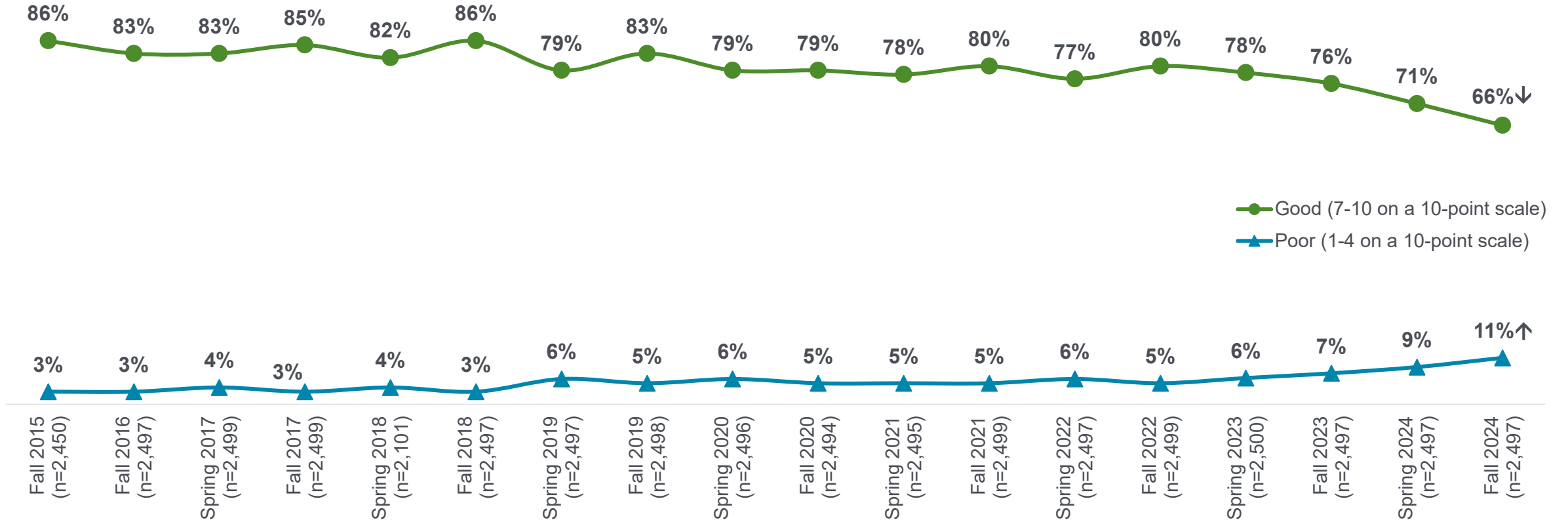
\*Rounding

↑/↓ Statistically higher/lower than spring 2024



# Tracking – Overall quality of life in Calgary

Overall quality of life in the city of Calgary today



Q. On a scale of 1 to 10 where 1 is very poor and 10 is very good, how would you rate the overall quality of life in the city of Calgary today?  
Base: Valid respondents

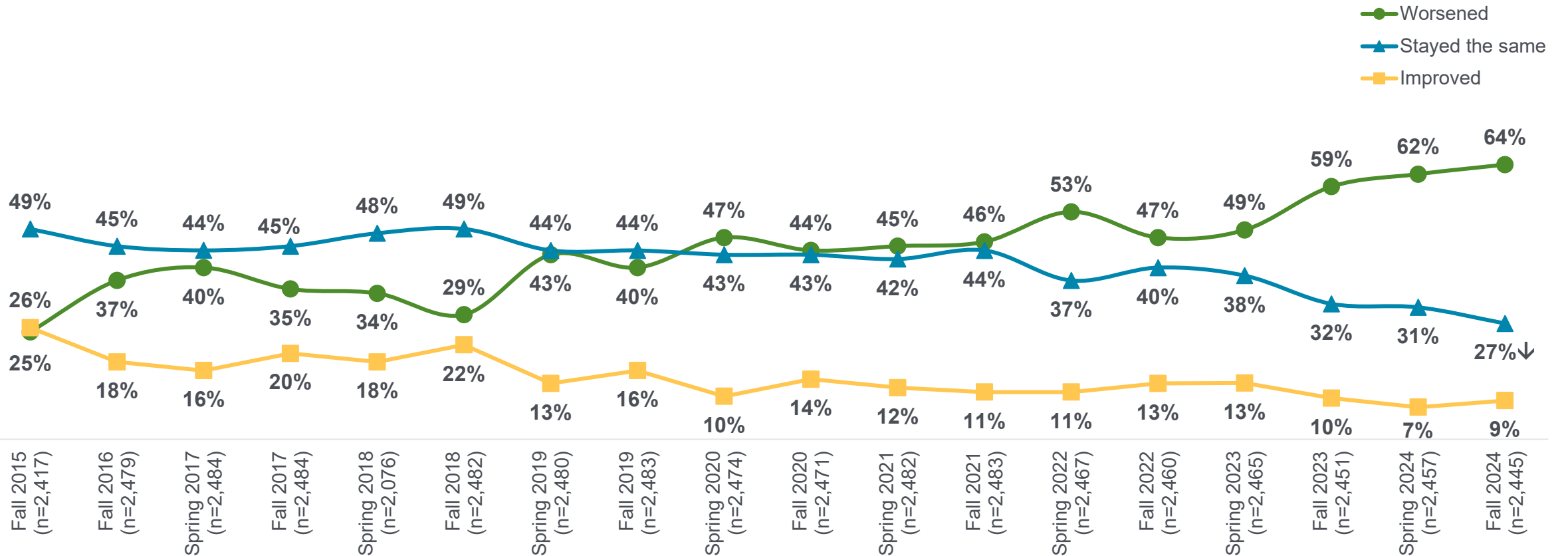
↑/↓ Statistically higher/lower than spring 2024





# Tracking – Perceived change in the quality of life

Perceived change in the quality of life



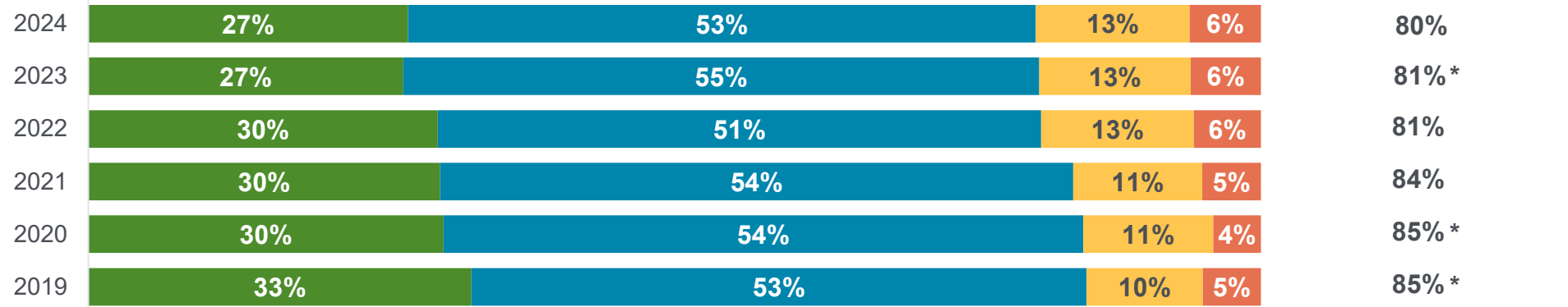
↑/↓ Statistically higher/lower than spring 2024



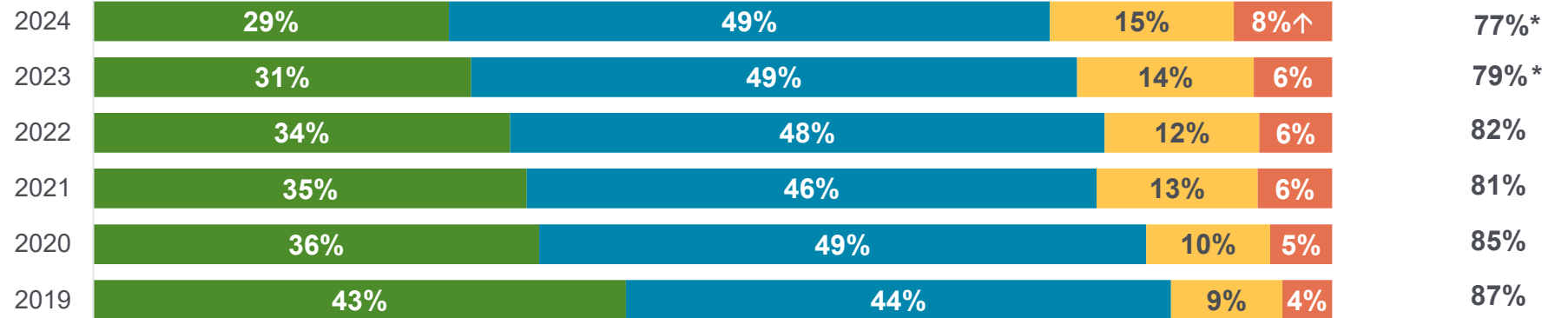
# Connectedness

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

I am proud to live in my neighbourhood



I am proud to be a Calgarian



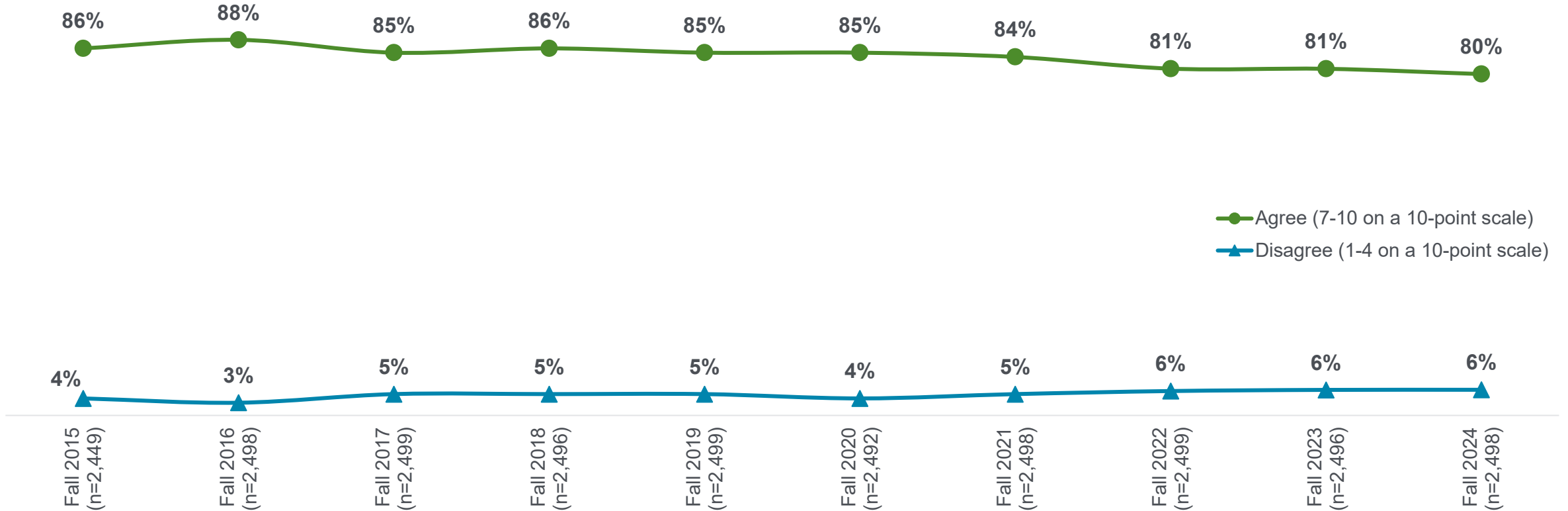
All waves conducted in the fall

\*Rounding



# Tracking – Proud to live in my neighbourhood

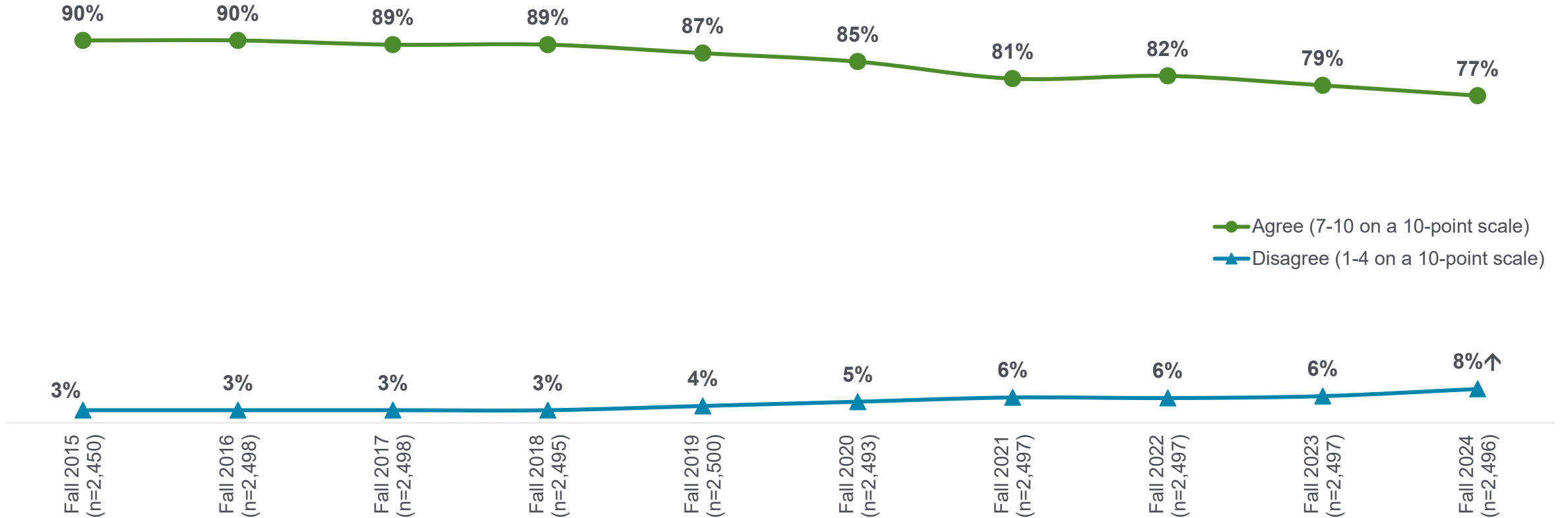
I am proud to live in my neighbourhood





# Tracking – Proud to be a Calgarian

I am proud to be a Calgarian



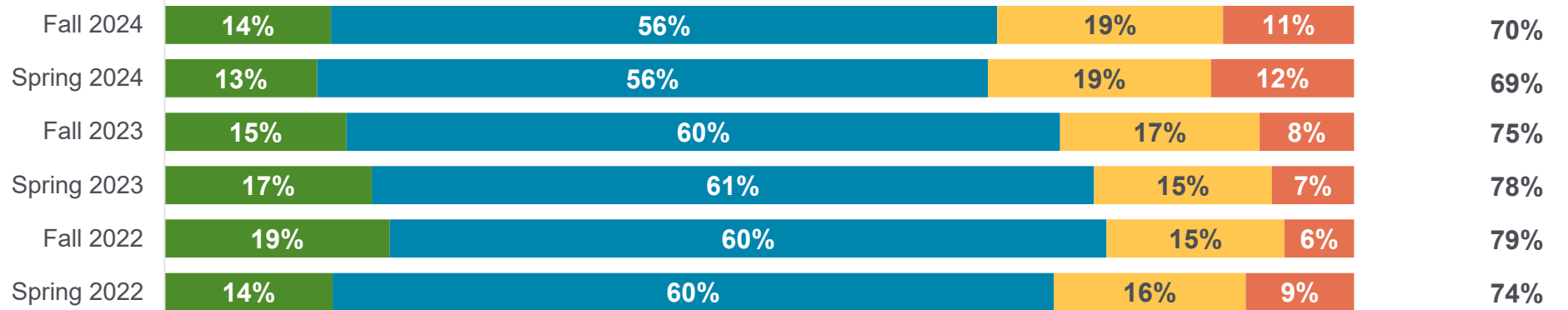
↑/↓ Statistically higher/lower than fall 2023



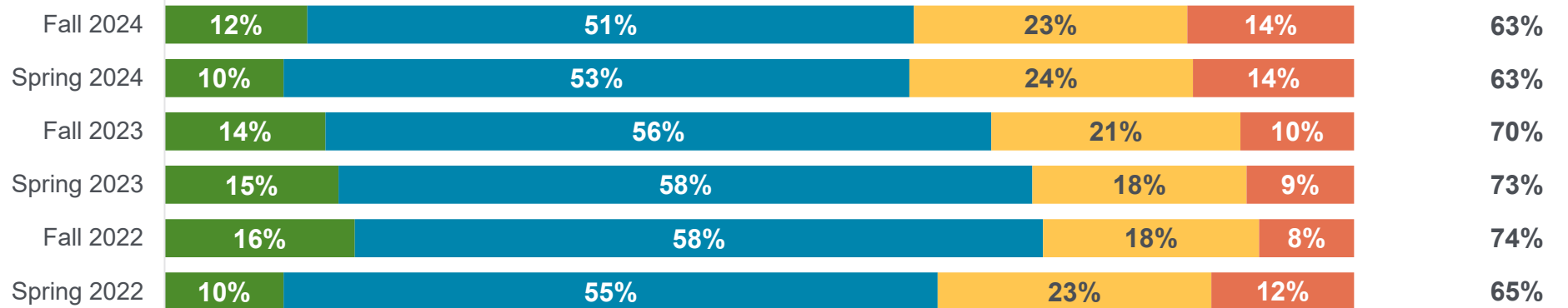
# Make a life and make a living

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

Calgary is a great place to make a life



Calgary is a great place to make a living



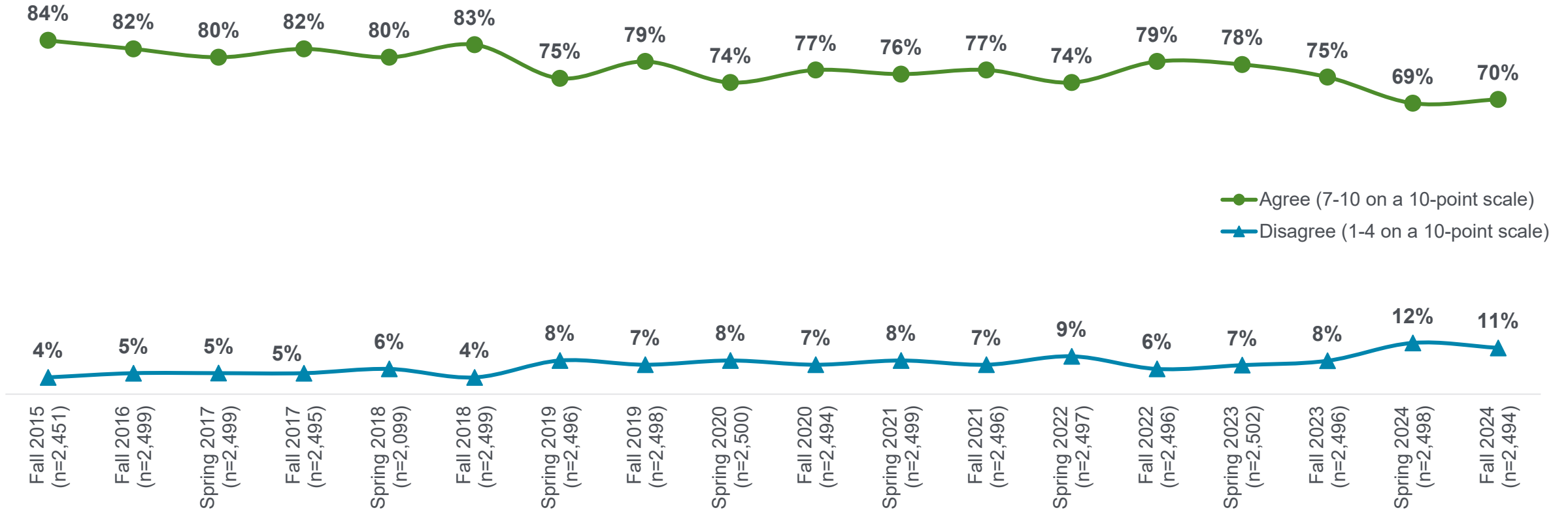
Q. I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate if you agree or disagree with each using a scale from 1 to 10, where 1 is completely disagree and 10 is completely agree.

Base: Valid respondents (bases vary)



# Tracking – Make a life

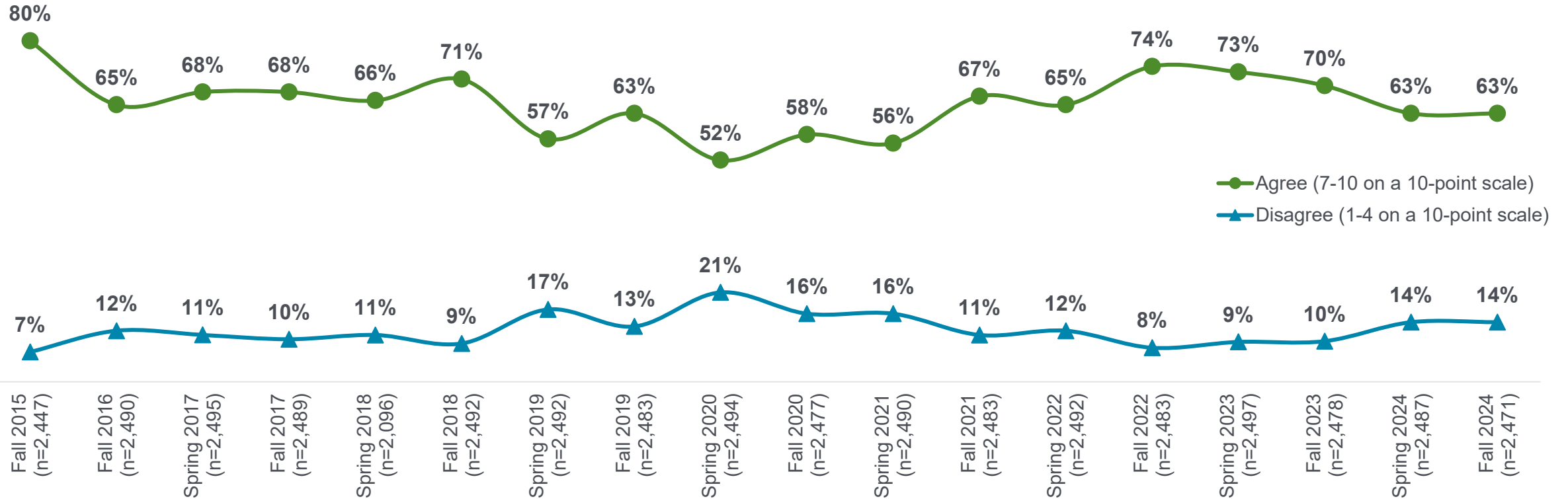
Calgary is a great place to make a life





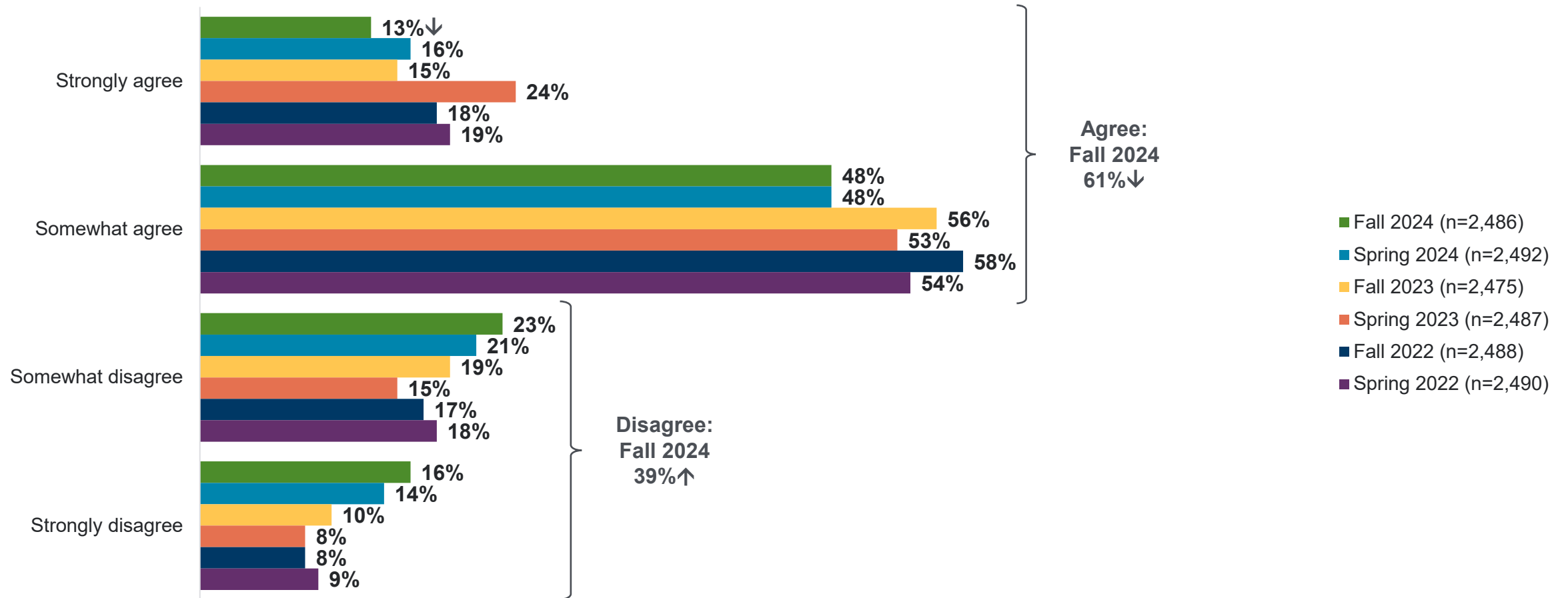
# Tracking – Make a living

Calgary is a great place to make a living





# On the right track to be a better city



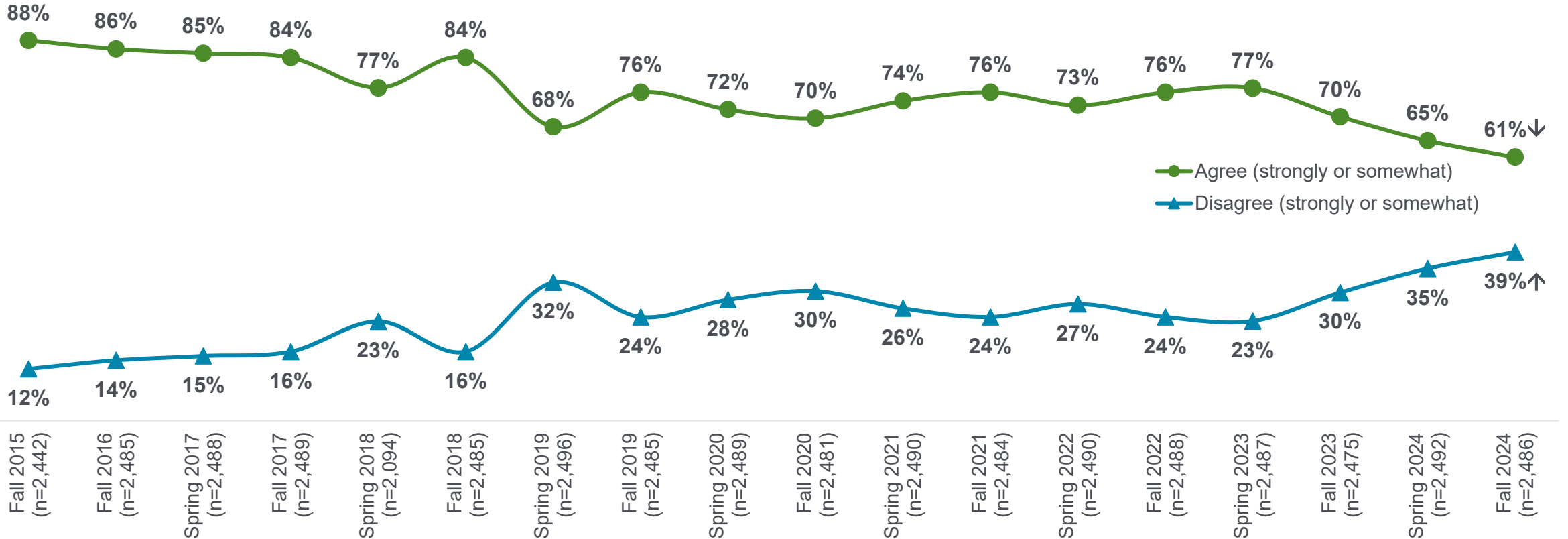
↑/↓ Statistically higher/lower than spring 2024





# Tracking – On the right track to be a better city

Calgary is on the right track to be a better city 10 years from now



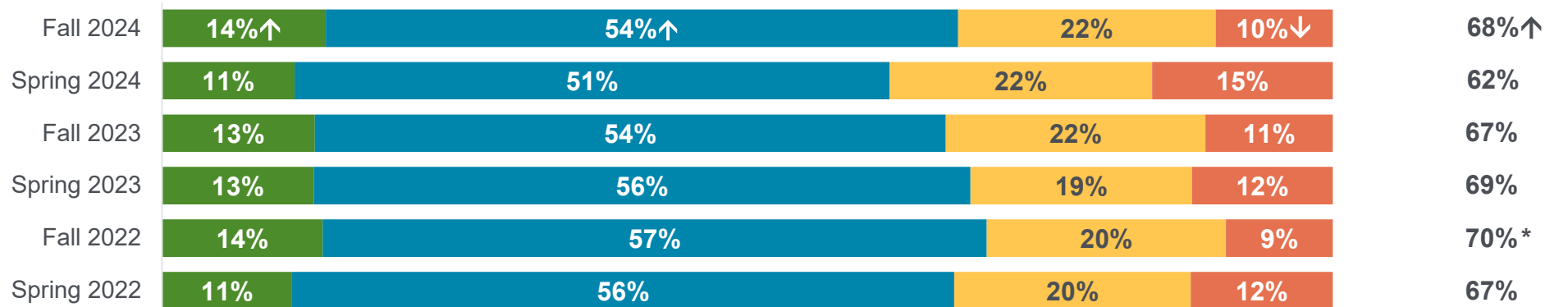
↑/↓ Statistically higher/lower than spring 2024



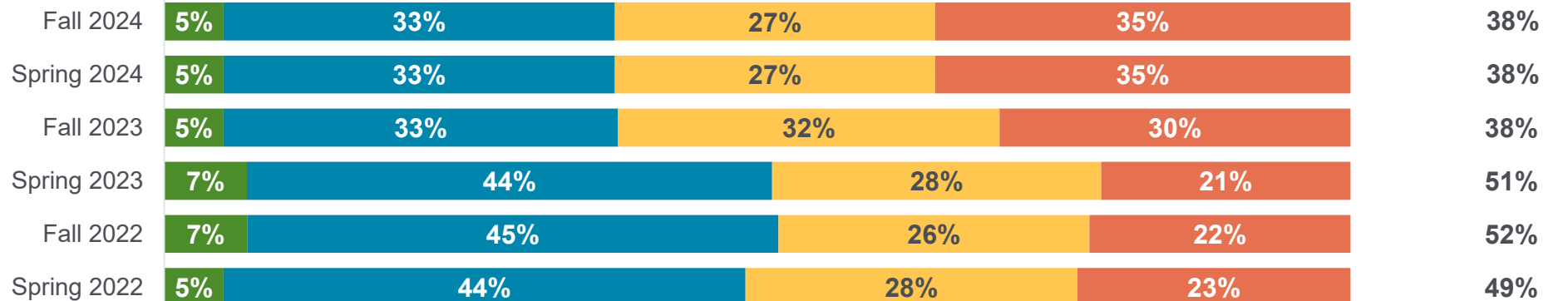
# Inclusivity and future direction

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

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



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



Q. I'm going to read you a series of statements that some people have said about life in Calgary. Please indicate if you agree or disagree with each using a scale from 1 to 10, where 1 is completely disagree and 10 is completely agree.  
Base: Valid respondents (bases vary)

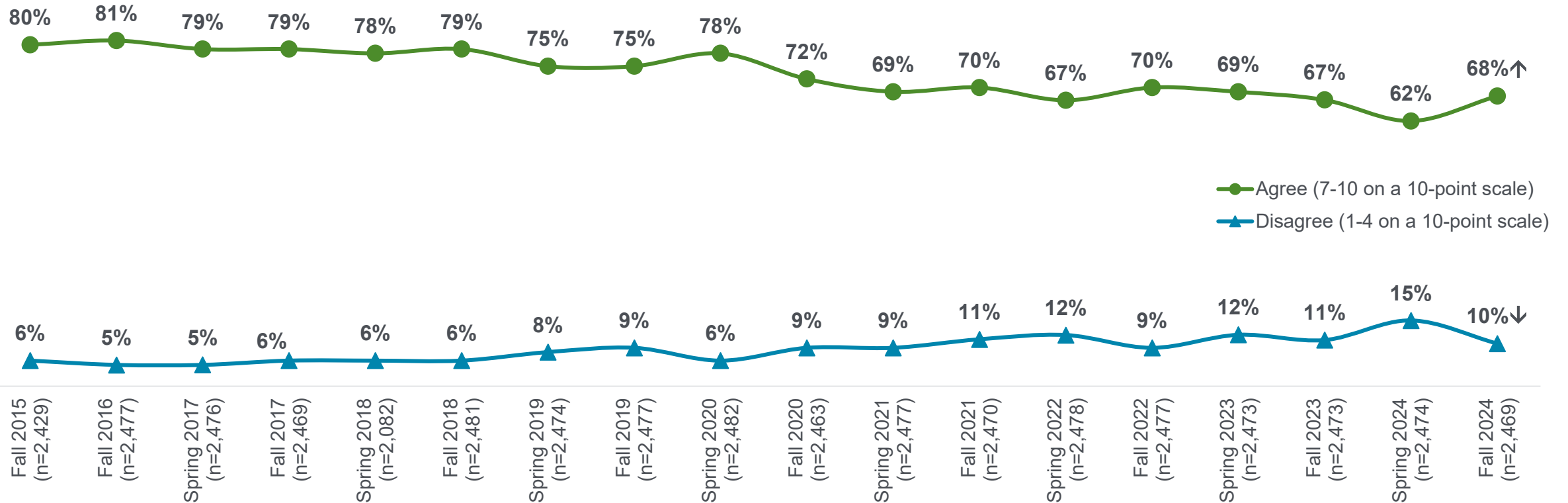
\*Rounding

↑/↓ Statistically higher/lower than spring 2024



# Tracking – Inclusivity

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

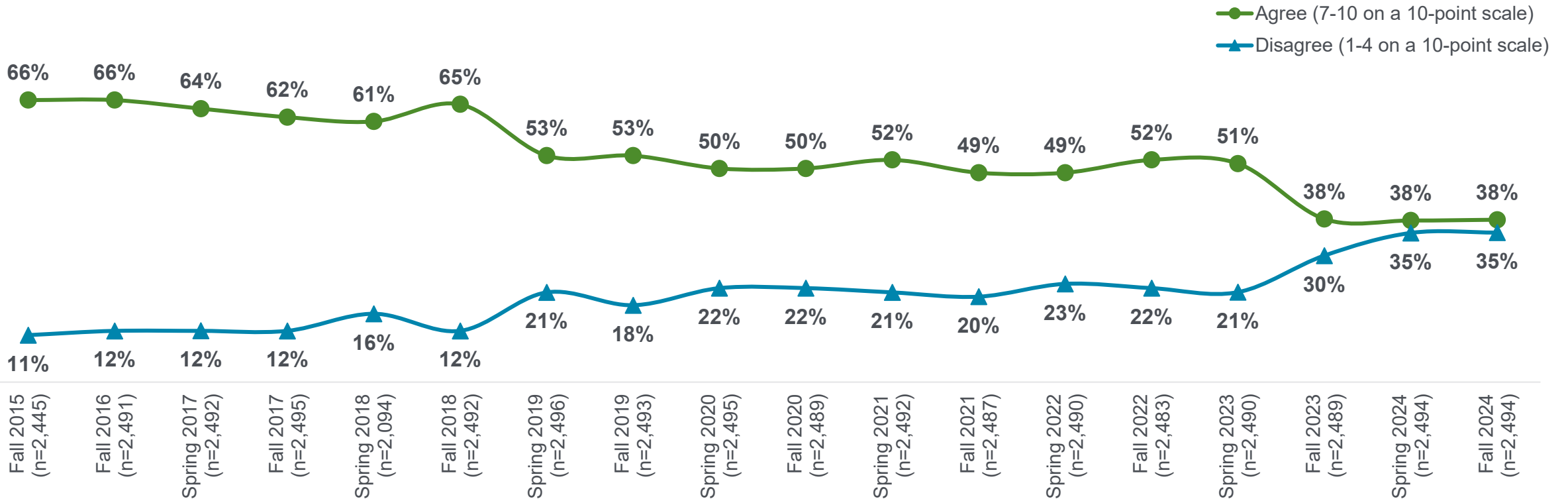


↑/↓ Statistically higher/lower than spring 2024



# Tracking – The future direction of Calgary

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

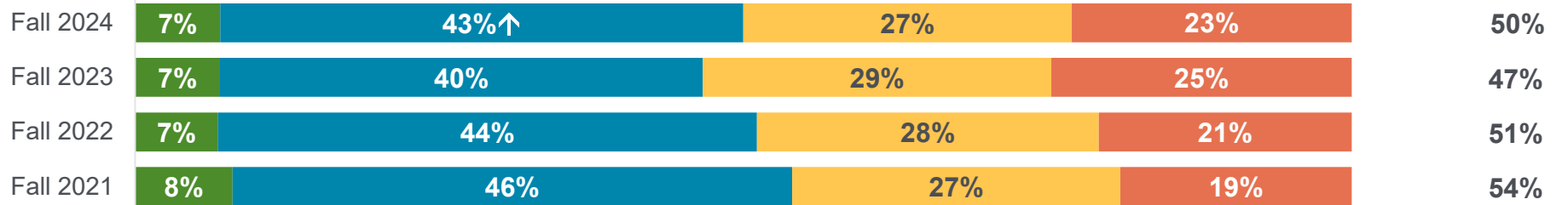




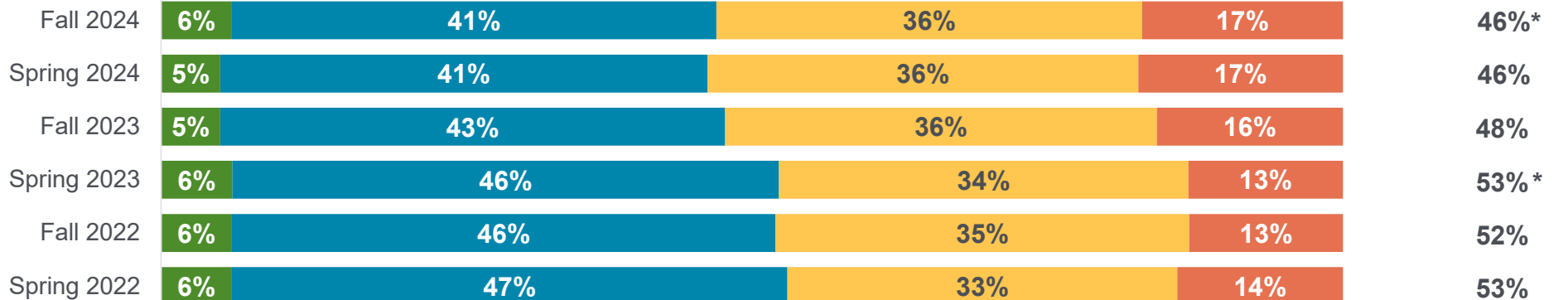
# Inclusivity

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

Calgary is safe for all residents and visitors, regardless of things like ethnicity, race, religion, income, or sexual identity+



The City of Calgary delivers programs and services that remove barriers to participation for Calgarians who need it the most



+ All waves conducted in the fall

\*Rounding

↑/↓ Statistically higher/lower than fall 2023

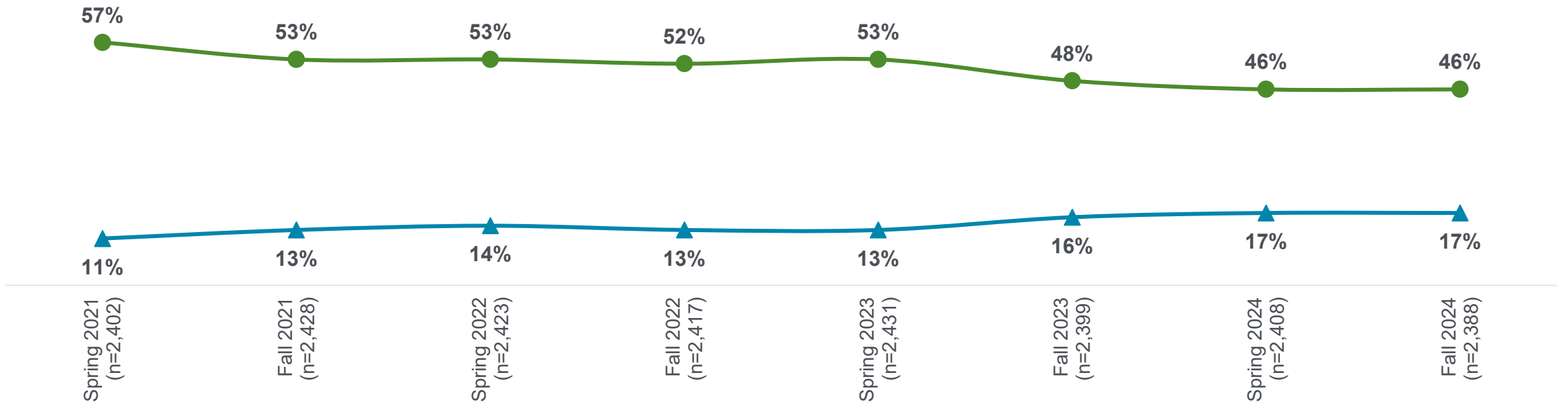
Q. Using the same agree or disagree scale, I have a few more statements that some people have said about life in Calgary.  
Base: Valid respondents (bases vary)



# Tracking – Delivers programs and services that remove barriers to participate

The City of Calgary delivers programs and services that remove barriers to participation for Calgarians who need it the most

● Agree (7-10 on a 10-point scale)  
▲ Disagree (1-4 on a 10-point scale)

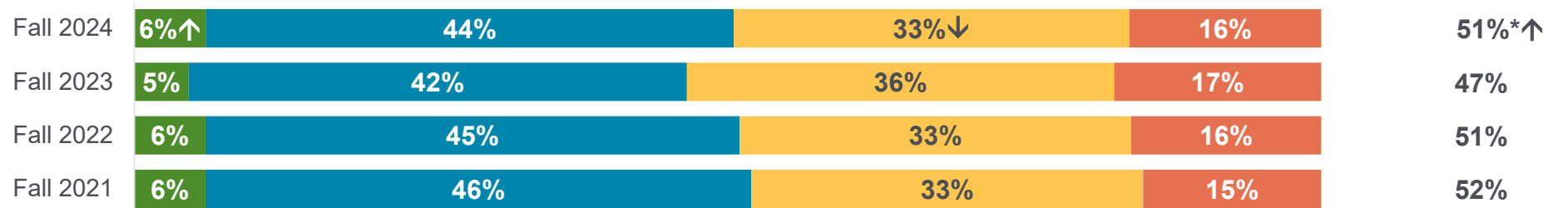




# City programs to reduce environmental impact

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

The City has programs and services aimed at helping Calgarians reduce their environmental impact



All waves conducted in the fall

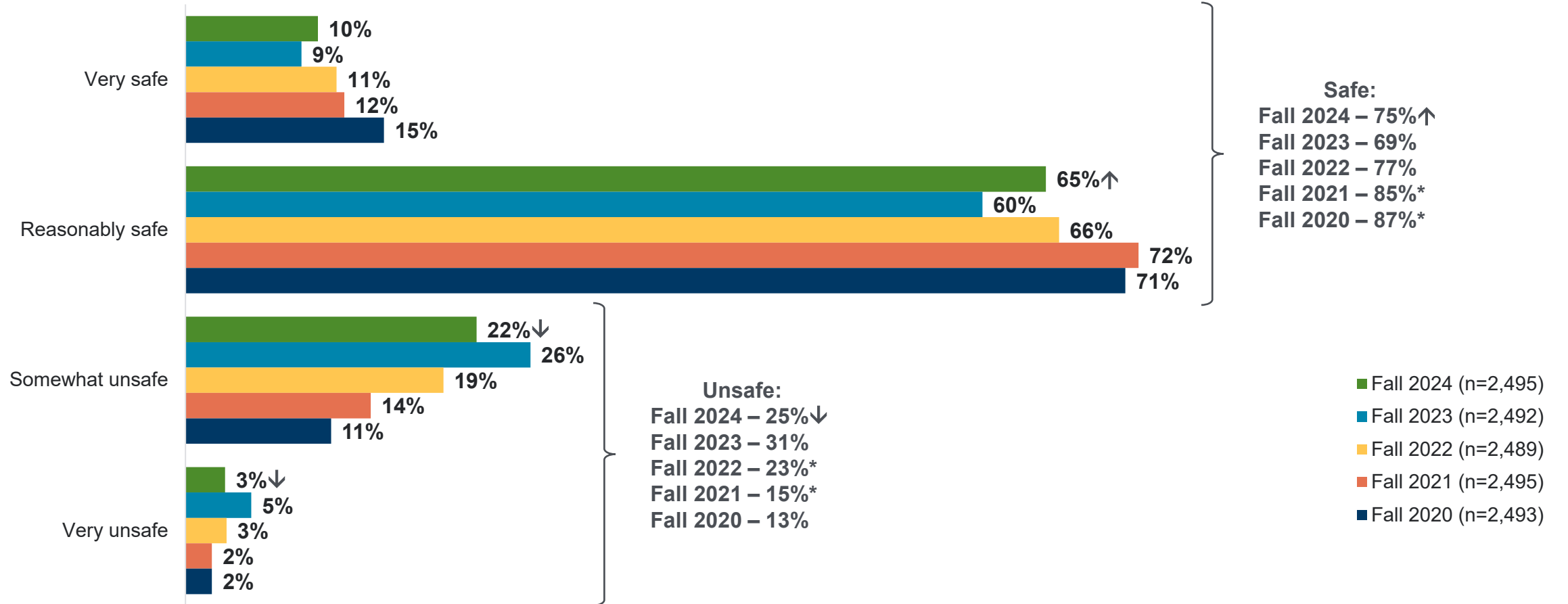
\*Rounding

↑/↓ Statistically higher/lower than fall 2023

Q. Using the same agree or disagree scale, I have a few more statements that some people have said about life in Calgary.  
Base: Valid respondents (bases vary)



# Overall perceived safety of the city of Calgary

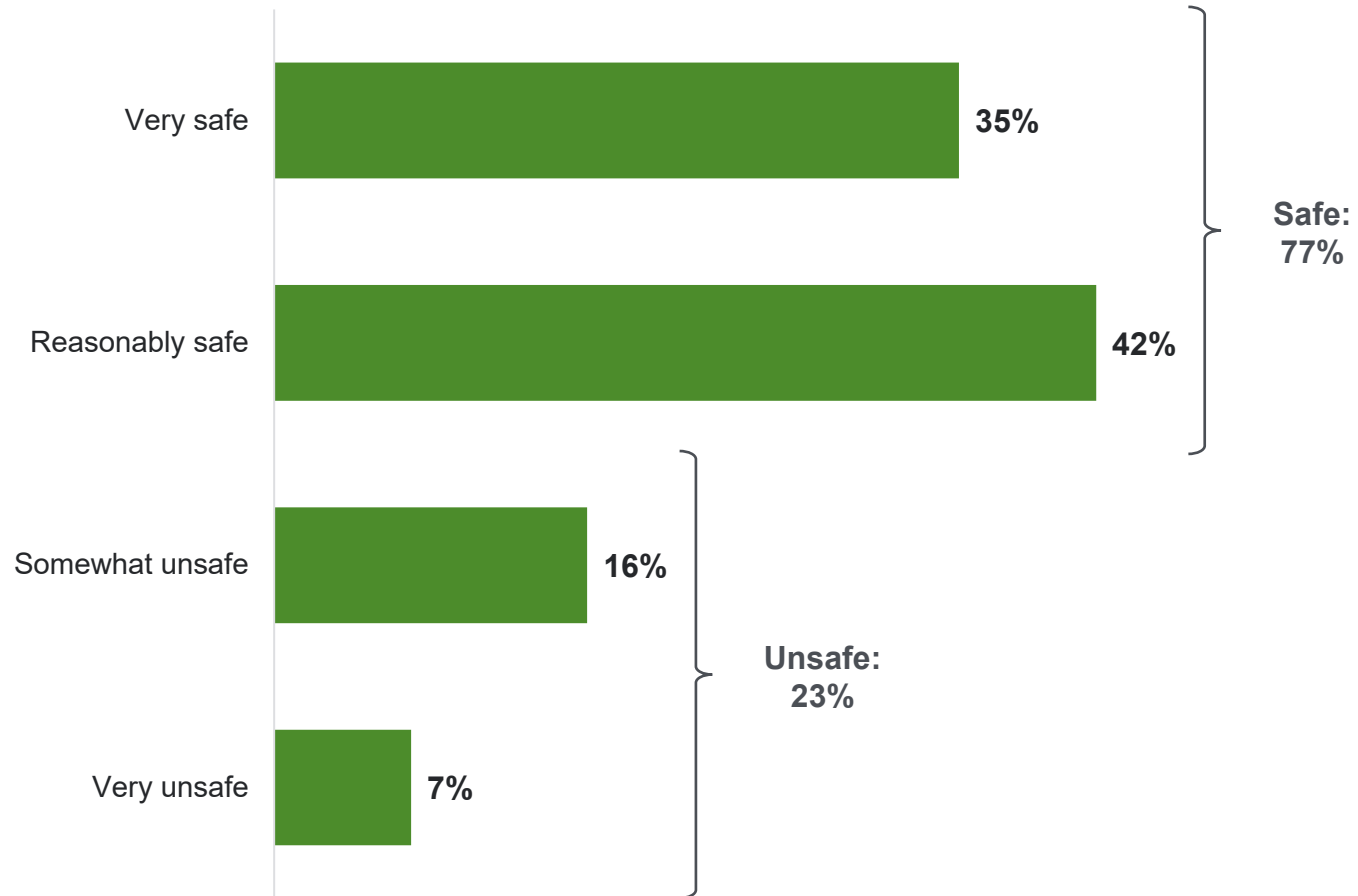


\*Rounding  
 ↑/↓ Statistically higher/lower than fall 2023





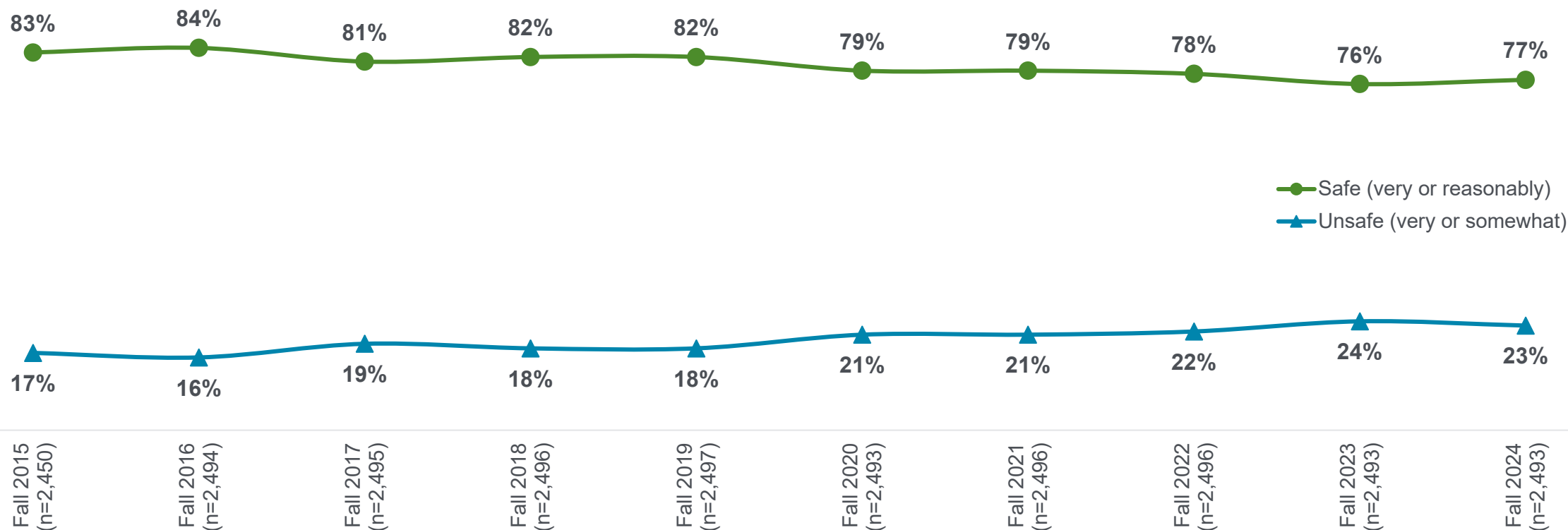
# Perceived safety in own neighbourhood





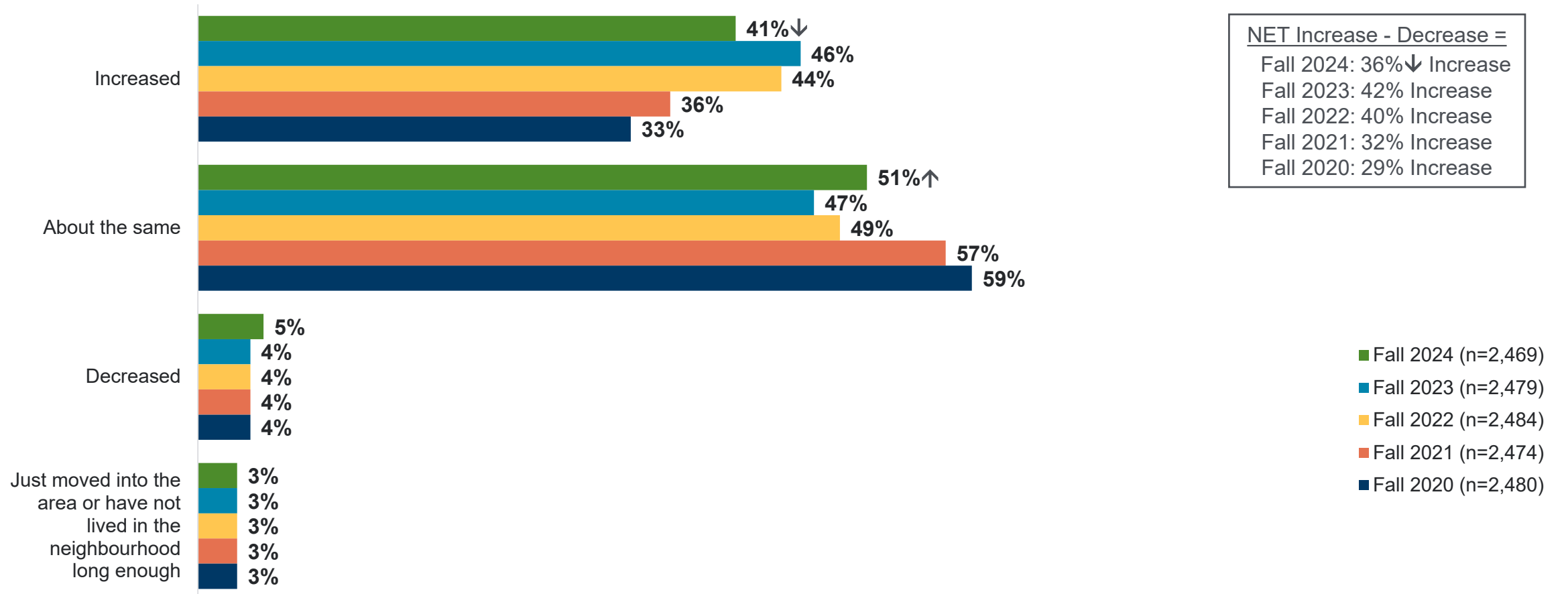
# Tracking – Perceived safety in own neighbourhood

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





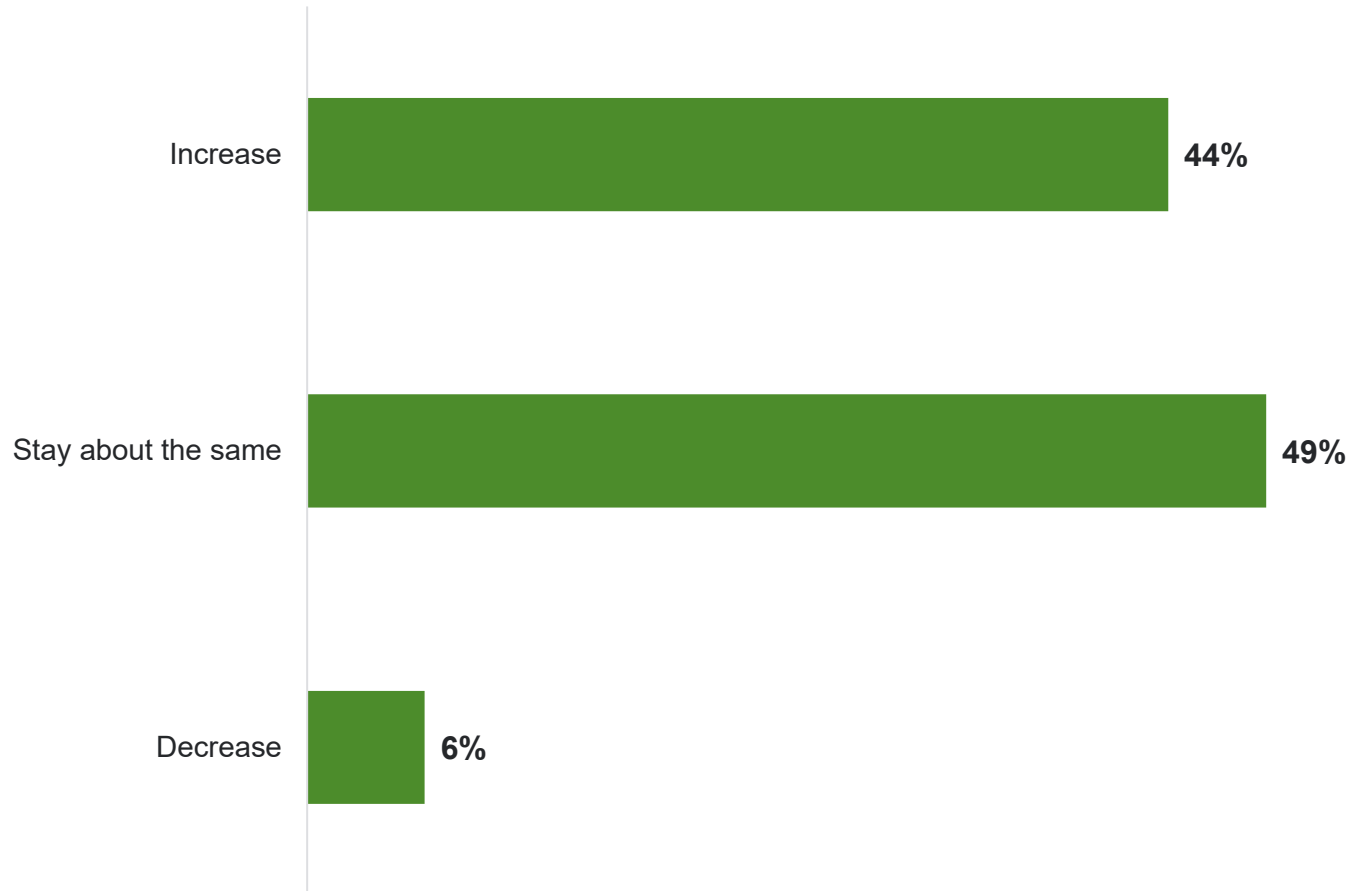
# Perceived change in neighbourhood crime



↑/↓ Statistically higher/lower than fall 2023



# Change in neighbourhood crime next 3 years



NET Increase - Decrease =  
Fall 2024: 38% Increase

+Question introduced fall 2024



# Issue agenda

**Infrastructure related items remain the primary issue Calgarians want leaders to address. Economic matters are the second key concern. Homelessness and crime round out the top areas of focus, despite seeing declines in mentions compared to 2023.**

- Calgarians predominantly feel that local leaders should address issues related to infrastructure, traffic, and roads (35%). This sentiment has grown since Spring 2024 (29%) and Fall 2023 (28%). Specific concerns in this category include infrastructure maintenance and development, road conditions, and traffic congestion.
- The economy (18%) emerges as the second most pressing issue for Calgarians. Residents mention the affordability of housing, rising mortgage costs and rents, and the overall cost of living as key economic challenges. While the proportion mentioning the economy remains steady compared to Spring 2024 (16%), it has increased statistically since Fall 2023 (11%).
- Ranking third is homelessness, poverty, and affordable housing (17%). However, mentions of these issues have declined statistically since Spring 2024 (24%) and Fall 2023 (31%).
- Crime, safety, and policing (16%) holds the fourth position among Calgarians' top of mind issues. The proportion mentioning these issues is statistically lower than Spring 2024 (22%) and Fall 2023 (27%).
- Rounding out the top five is transit (14%), which has also seen a decrease in mentions compared to Spring 2024 (17%) but is consistent with Fall 2023 (15%).
- Beyond the top five, Calgarians also make mention of water supply and infrastructure (13%), growth and planning (12%), and taxes (9%) as important issues for local leaders to address.



# Issue agenda

Mentions <5% are not shown  
Data labels of <3% are not shown

↑/↓ Statistically higher/lower than spring 2024

A “Net” is a combination of 2 or more mentions that cover a specific theme.

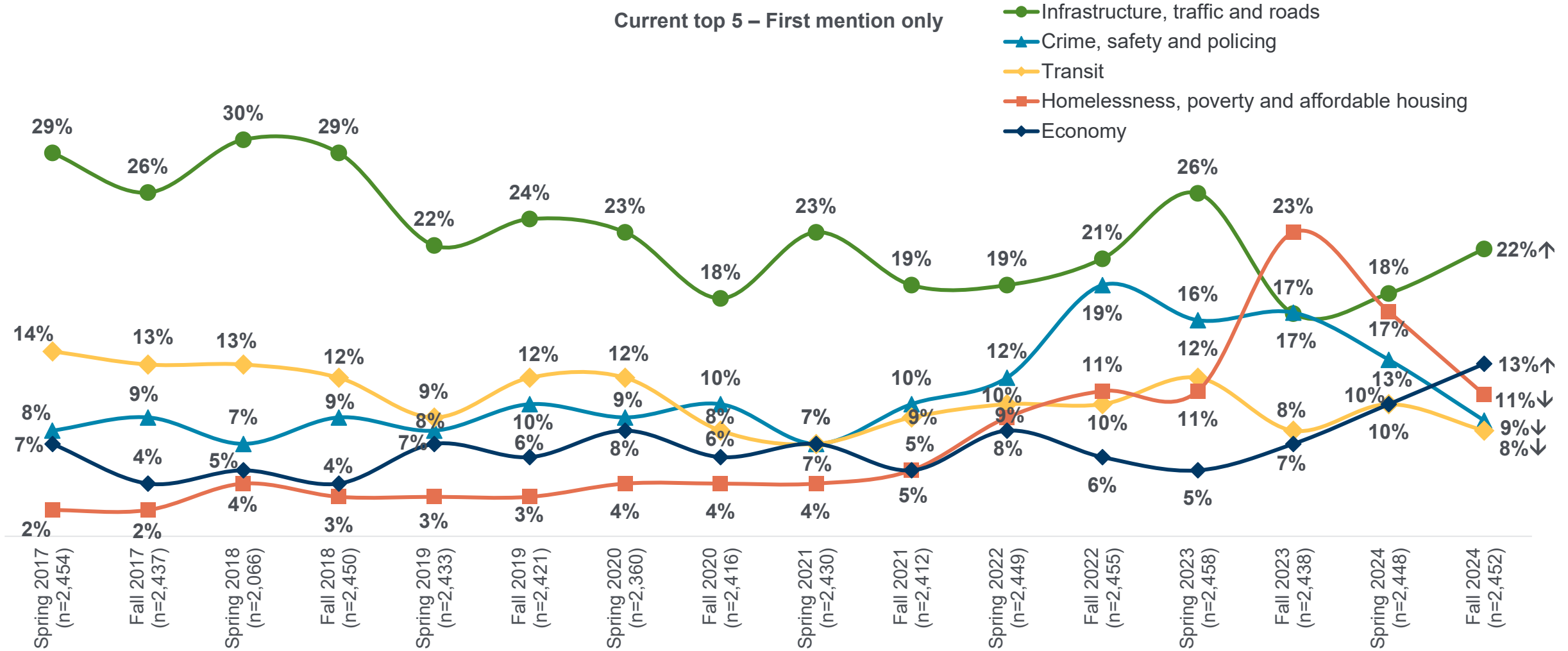
	■ First mention	■ Other mentions	Total	Change Fall 2024 – Spring 2024
<b>Net - Infrastructure, Traffic and Roads</b>	22%	13%	35%	+6↑
Infrastructure maintenance/ improvement/ development	8%	6%	14%	+7↑
Road conditions	7%	5%	12%	+2↑
Roads (unspecified)	3%	5%		+3↑
Traffic congestion	3%	5%		-1
<b>Net - Economy</b>	13%	5%	18%	+2
Housing affordability/ mortgage rates/ rent increase	8%	10%		+2↑
Economy/ cost of living	5%	7%		-1
<b>Net - Homelessness, Poverty and Affordable Housing</b>	11%	6%	17%	-7↓
Poverty/ homelessness/ related social issues	6%	5%	11%	-
Affordable/available housing	5%	3%	8%	-6↓
<b>Net - Crime, Safety and Policing</b>	9%	7%	16%	-6↓
Crime [incl. Breaking and entering/ gangs/ drug dealers, etc.]	4%	4%	8%	-
Public safety	5%	7%		-6↓
<b>Net - Transit</b>	8%	6%	14%	-3↓
Public Transportation [incl. buses/ C-train/ poor service]	5%	3%	8%	-5↓
Transit system improvements	3%	5%		-
<b>Water supply/ infrastructure</b>	8%	5%	13%	-
<b>Net - Growth and Planning</b>	7%	5%	12%	+2↑
City zoning	4%	3%	7%	+3↑
<b>Net - Taxes</b>	5%	4%	9%	-4↓
Taxes/ high taxes	3%	5%		-4↓
<b>Net - Environment and Waste Management</b>	4%	3%	7%	+1
<b>Net - Budget and Spending</b>	3%	5%		+1
Budget control/ appropriate spending of taxes	3%	5%		+1
<b>Civic Engagement/ Communication</b>	3%	5%		+3↑
<b>Net – Recreation and parks</b>	3%	5%		-5↓
Education	3%	5%		-
None	8%	8%		-2↓

Q. In your view, as a resident of the city of Calgary, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your local leaders? Are there any other important local issues?  
Base: Valid respondents (n=2,458)



# Tracking – Most important issue facing Calgary

Current top 5 – First mention only



↑/↓ Statistically higher/lower than spring 2024





# City programs and services

# Summary of findings: Satisfaction with City services and programs

**Satisfaction with City services remains high. Waste and recycling services meet the expectations of most Calgarians. Notable declines are seen in satisfaction with water services.**

- Calgarians' satisfaction with the overall level and quality of services and programs offered by The City stands at more than three-fifths (63%) in fall 2024, identical to spring 2024 (63%) but still statistically lower than fall 2023 (69%).

## Satisfaction with waste management services

- Residential garbage collection continues to receive high marks, with satisfaction holding steady at 90%, on par with spring 2024 (91%) and fall 2023 (90%).
- Nine-in-ten (90%) Calgarians are satisfied with residential Blue Cart recycling, unchanged from spring 2024 (90%) but slightly lower than fall 2023 (93%).
- Green Cart services also maintain strong satisfaction levels, with nine-in-ten (90%) Calgarians satisfied, consistent with spring 2024 (89%) and fall 2023 (91%).

## Satisfaction with water services

- Wastewater collection and treatment services see a decline in satisfaction, with just over four-fifths (84%) of Calgarians satisfied, down from both spring 2024 (95%) and spring 2023 (94%).
- Stormwater management also experiences a noticeable decrease in satisfaction, now at 83%. This is down from 93% in spring 2024 and 90% in spring 2023.
- Satisfaction with water treatment and supply, including the availability and supply of clean, safe drinking water, has fallen sharply to around two-thirds (68%). This is a substantial decline from the high levels seen in spring 2024 (94%) and spring 2023 (96%).

# Summary of findings: Satisfaction with City services and programs

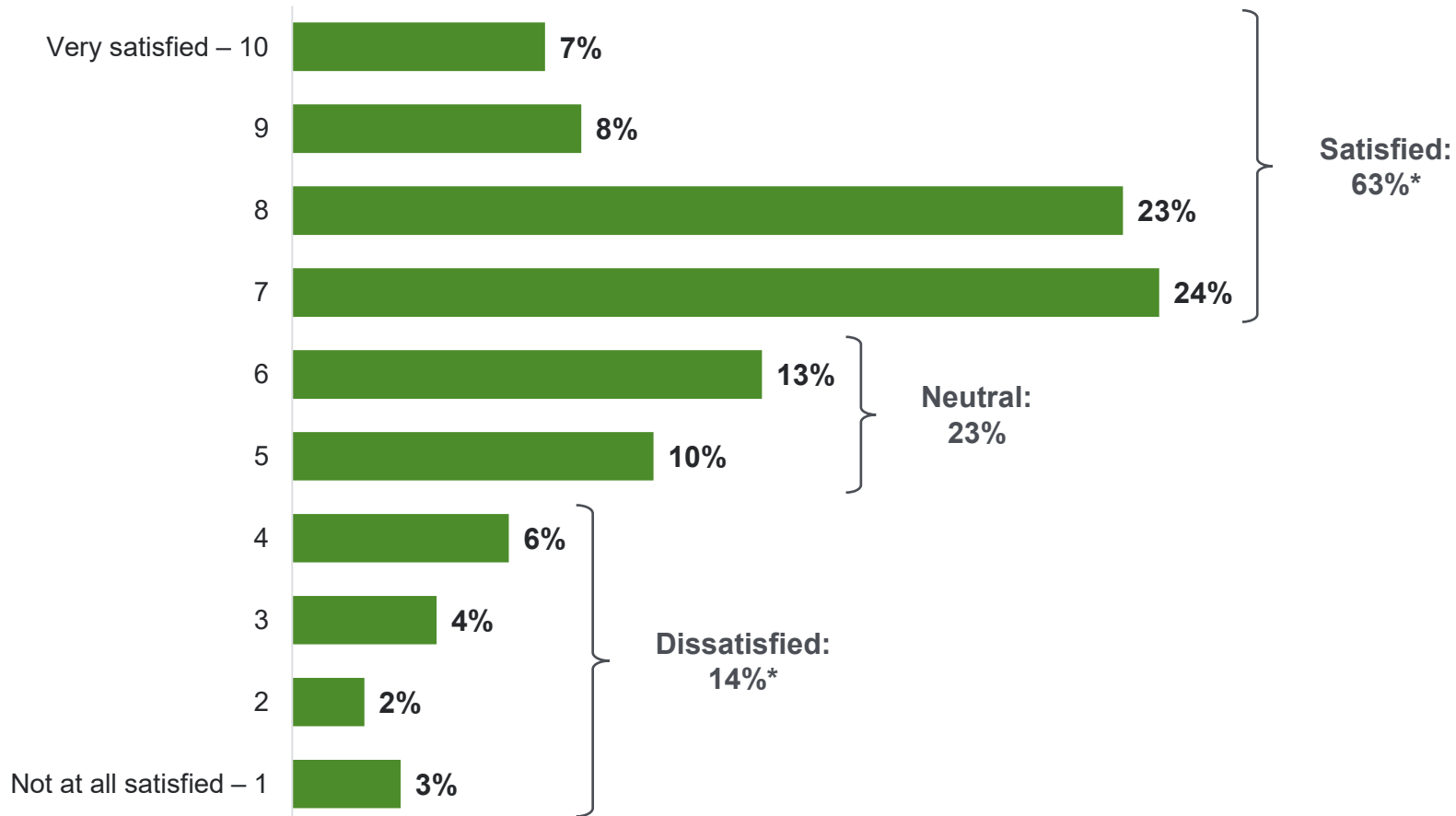
**Satisfaction with Calgary's pathways and bikeways remain high. Bikeways in particular show improvement since last measured. Declines are seen in satisfaction with roads and infrastructure including traffic flow management and road maintenance.**

## Satisfaction with roads, pathways and bikeways

- The vast majority of Calgarians are satisfied with the city's pathway system, with nine-in-ten (90%) rating it positively. While scores remain high, this is a slight decrease from fall 2022 (93%).
- Spring road cleaning also receives strong ratings, with around four-fifths (82%) of Calgarians satisfied. This too is a slight decline from fall 2022 (90%).
- Satisfaction with on-street bikeways has statistically improved, rising to three-quarters (74%) from 66% in fall 2022.
- In contrast, satisfaction with several other transportation measures has decreased. Just over three-fifths (63%) are satisfied with traffic flow management, down from fall 2022 (75%).
- Satisfaction with city-operated roads and infrastructure has also declined, now standing at (59%) compared to fall 2022 (85%).
- Road maintenance, including pothole repairs, sees the most substantial drop in satisfaction. While previously at 70% in fall 2022, now 44% of Calgarians are satisfied with this service.



# Satisfaction with the overall level and quality of City services and programs

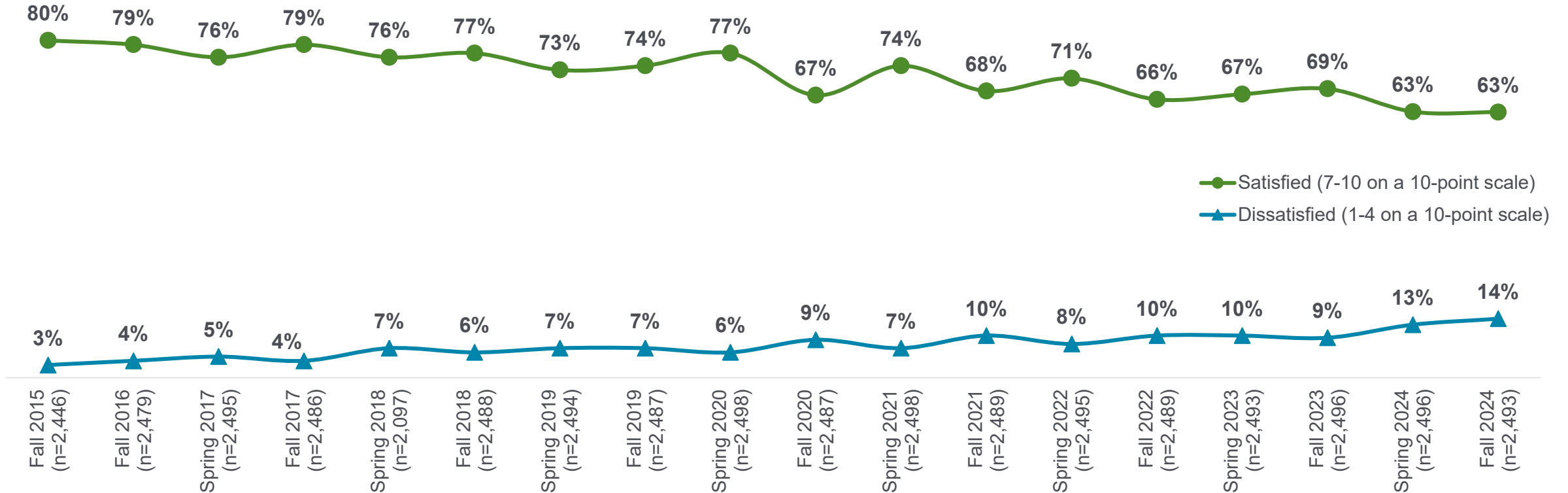


\*Rounding



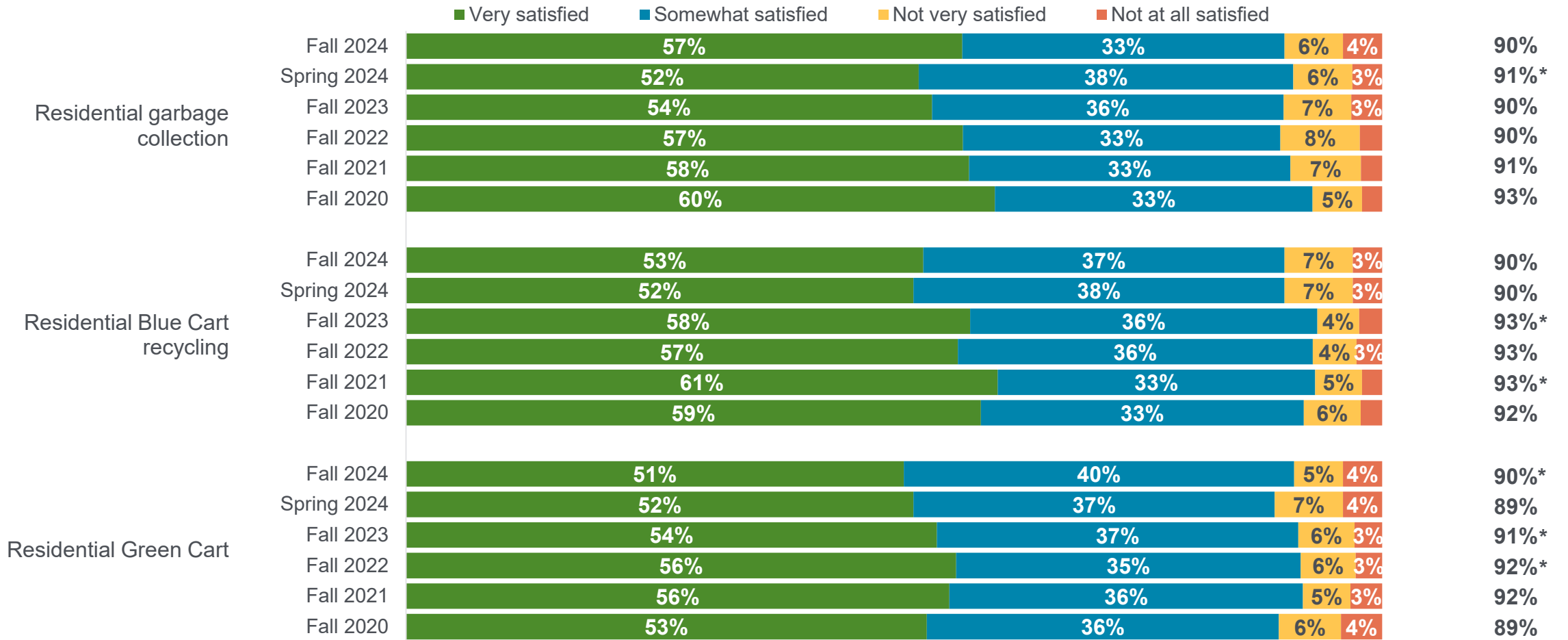
# Tracking – Satisfaction with City services and programs

Satisfaction with overall level and quality of services and programs provided by The City of Calgary





# Satisfaction with waste management services



Q. And, are you very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with the job The City is doing at providing the following services.

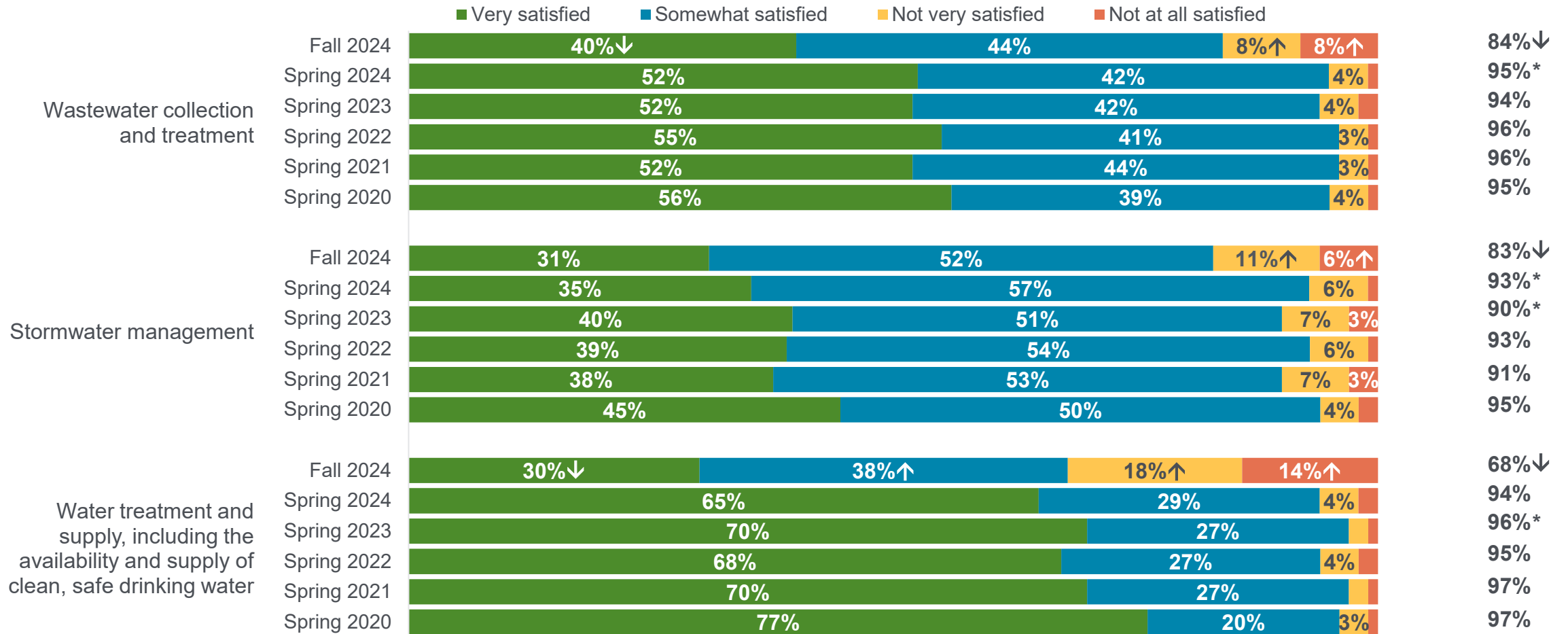
Base: Valid respondents (bases vary)

Data labels <3% are not shown

\*Rounding



# Satisfaction with water services

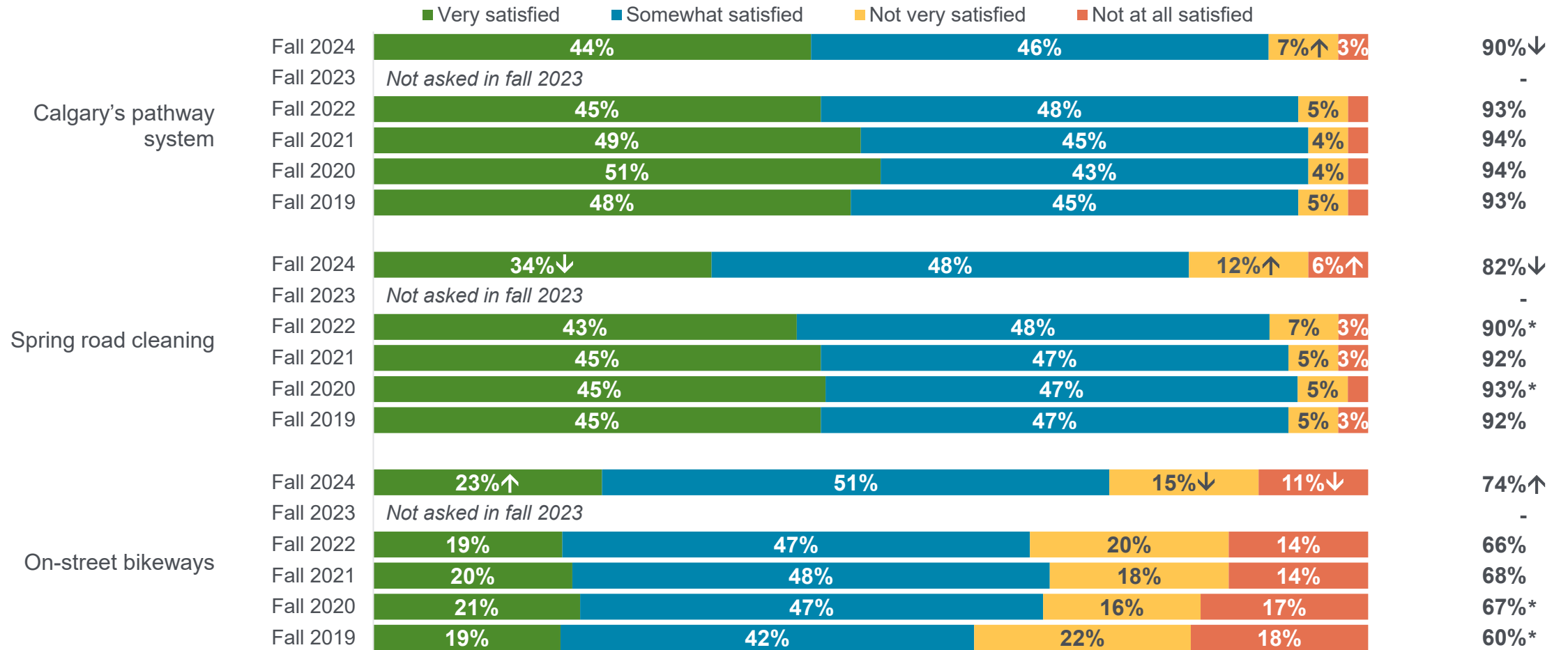


Q. And, are you very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with the job The City is doing at providing the following services.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than spring 2024



# Satisfaction with roads, pathways, and bikeways



Q. And, are you very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with the job The City is doing at providing the following services.  
Base: Valid respondents (bases vary)

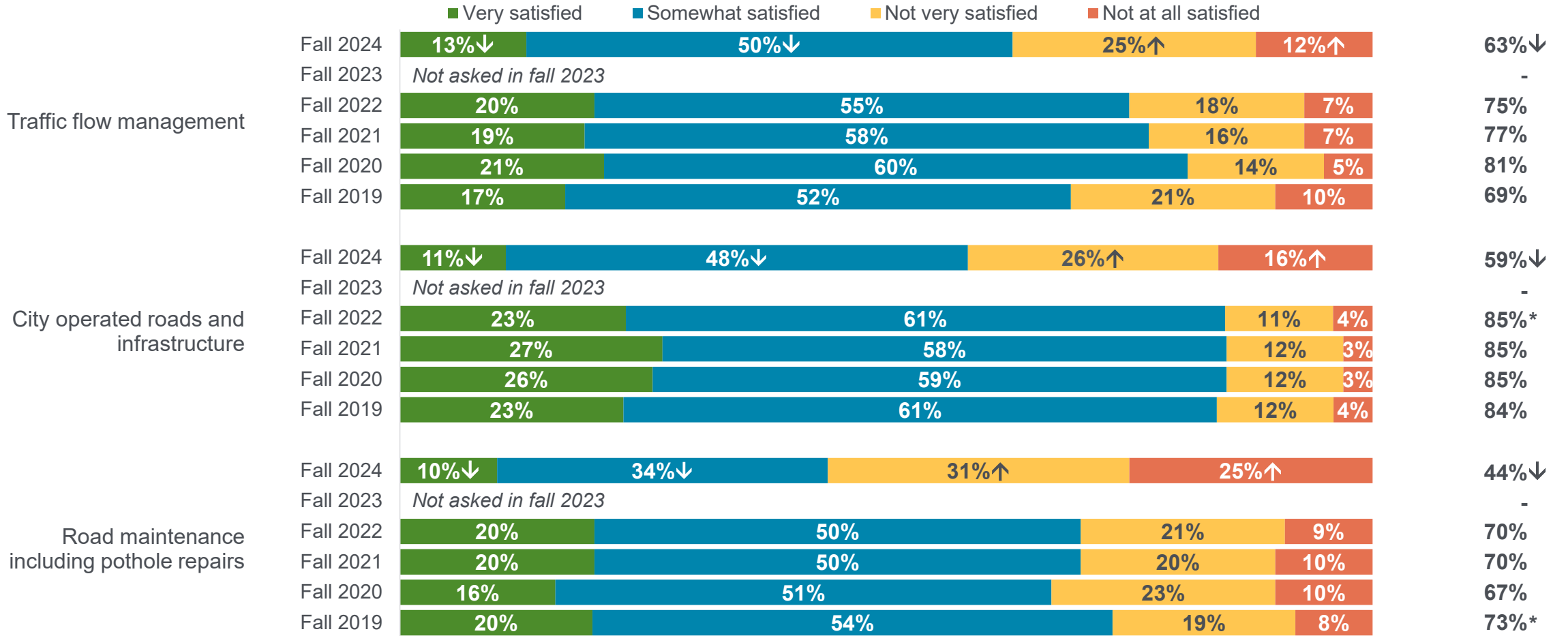
\*Rounding  
↑/↓ Statistically higher/lower than fall 2022





# Satisfaction with roads, pathways, and bikeways (continued)

Data labels <3% not shown



Q. And, are you very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with the job The City is doing at providing the following services.

Base: Valid respondents (bases vary)

\*Rounding

↑/↓ Statistically higher/lower than fall 2022



# Taxation

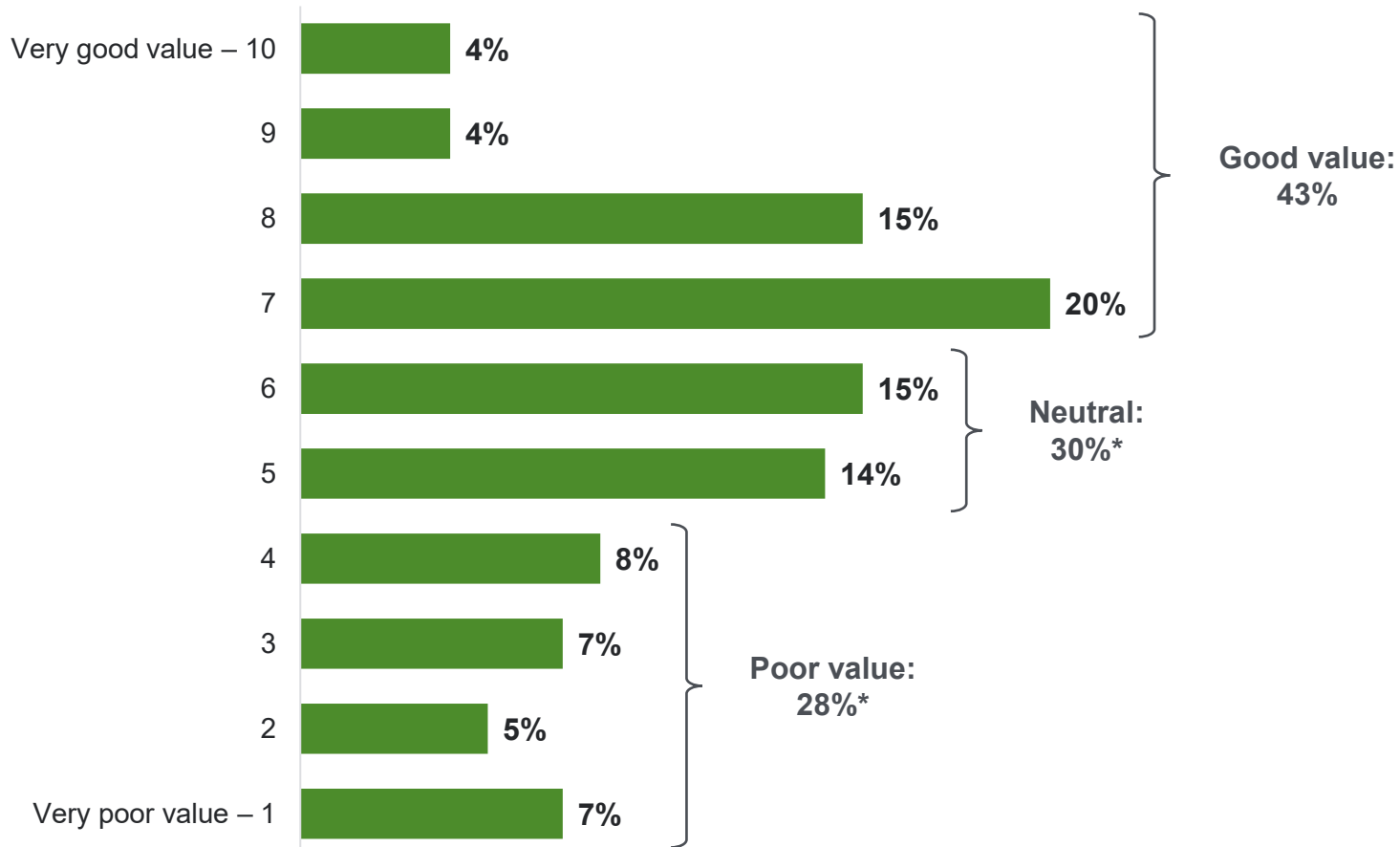
# Summary of findings: Taxation

## Perceptions of value for taxes remain mixed. Calgarians are also divided on the best way to strike a balance between taxation and service delivery.

- Calgarians continue to have differing opinions on the value they receive from their municipal tax dollars. More than two-fifths (43%) feel they receive 'good' value, consistent with spring 2024 (44%) but statistically lower than fall 2023 (50%). Conversely, 28% feel they receive 'poor' value, consistent with spring 2024 (26%) and statistically higher than fall 2023 (20%).
- When it comes to balancing taxation and service delivery, Calgarians also have differing opinions. A total of 46% prefer The City to impose higher taxes to maintain or expand services, on par with spring 2024 (48%) and fall 2023 (45%).
  - Within this group, 7% support increasing taxes beyond current inflation rates to expand services, similar to spring 2024 (8%) but a statistical drop from fall 2023 (18%).
  - Meanwhile, 39% favor increasing taxes at current inflation rates to maintain services at current levels, consistent with spring 2024 (40%) and statistically higher than fall 2023 (27%).
- Meanwhile, 45% prefer The City to cut services in order to maintain or reduce taxes, consistent with both spring 2024 (46%) and fall 2023 (45%). This preference is split evenly between those who prefer cutting services to maintain current tax levels and those who prefer cutting services to reduce taxes.
  - Nearly one-quarter (23%) prefer cutting services to maintain the current tax level, consistent with spring 2024 (24%) and fall 2023 (21%).
  - And another 23% prefer cutting services to allow for tax reductions. This is consistent with spring 2024 (22%) and fall 2023 (24%).



# Perceived value of property taxes



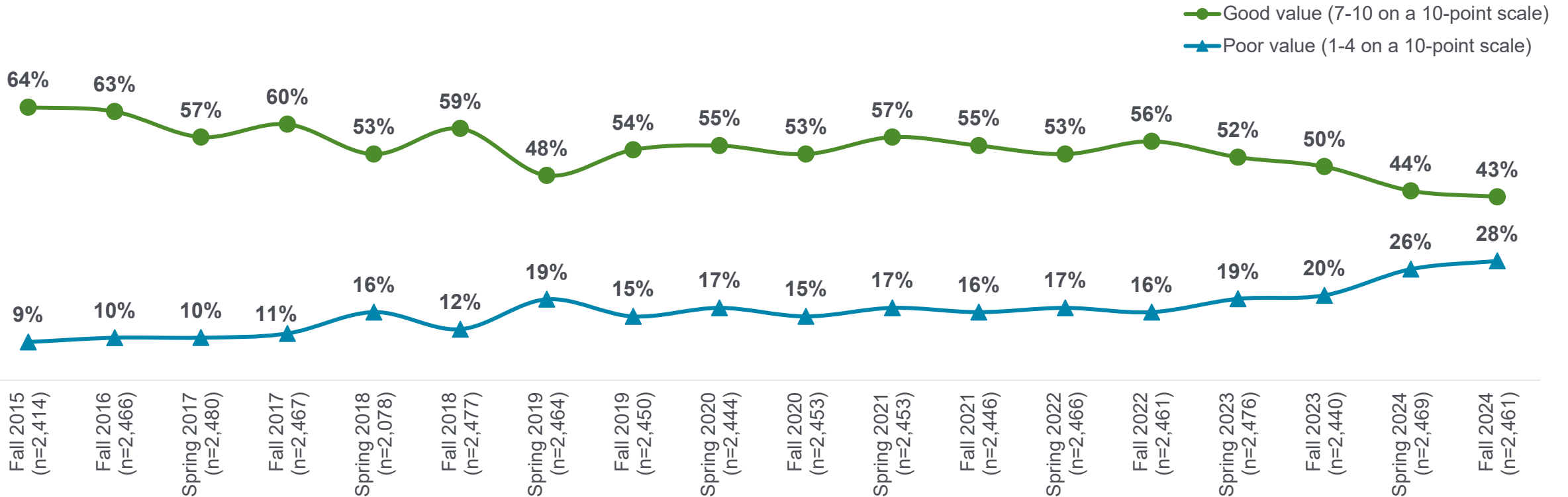
Q. Property tax dollars are divided between The City and the Province. Approximately two-thirds of residential property tax payments goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars using a scale of 1 to 10 where 1 is very poor value and 10 is very good value.

Base: Valid respondents (n=2,461)

\*Rounding



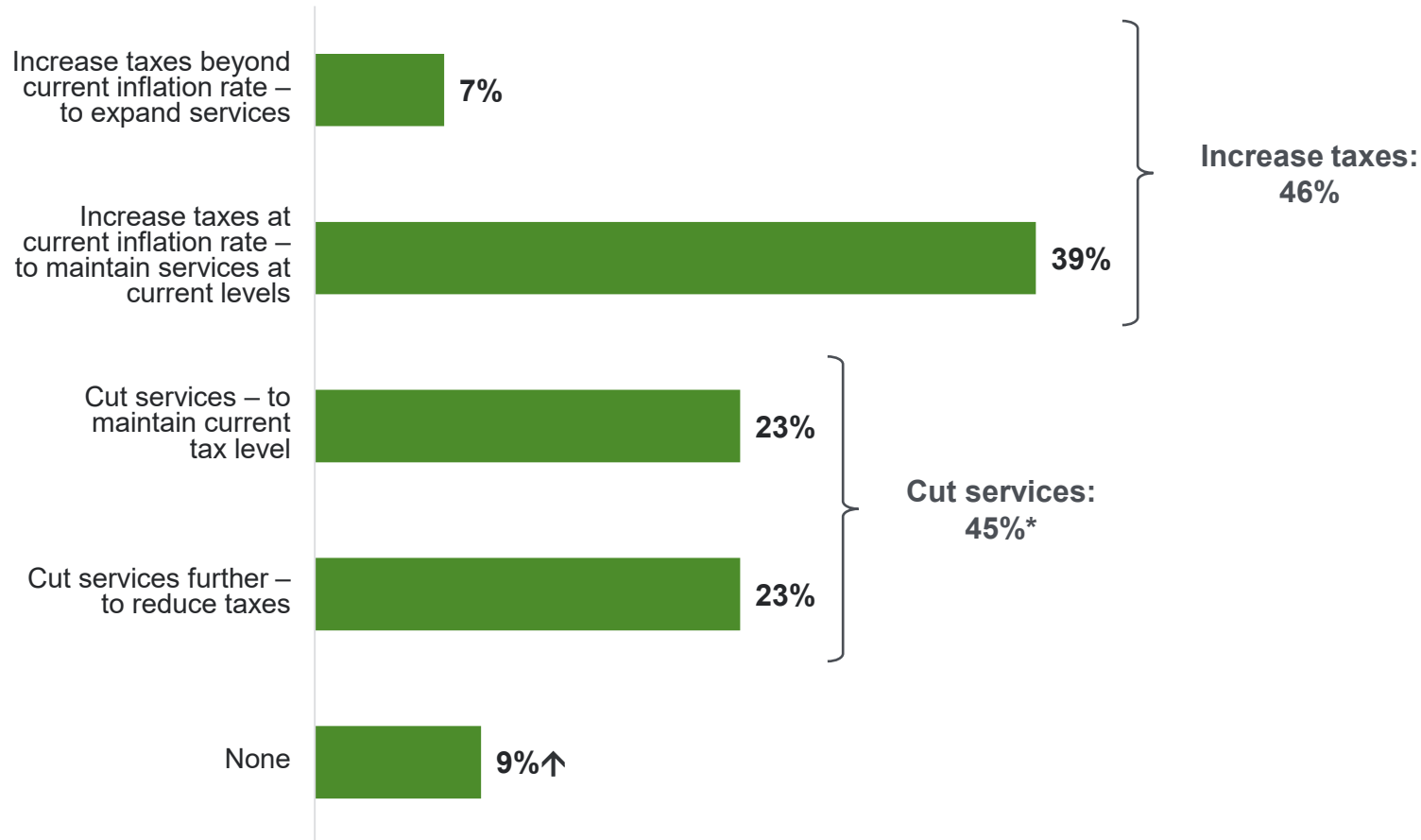
# Tracking – Perceived value of property taxes



Property tax dollars are divided between The City and the Province. Approximately two-thirds of residential property tax payments goes to The City to fund municipal services. Considering the services provided by The City, please rate the value you feel you receive from your municipal property tax dollars using a scale of 1 to 10 where 1 is very poor value and 10 is very good value.



# Balancing taxation and service delivery levels



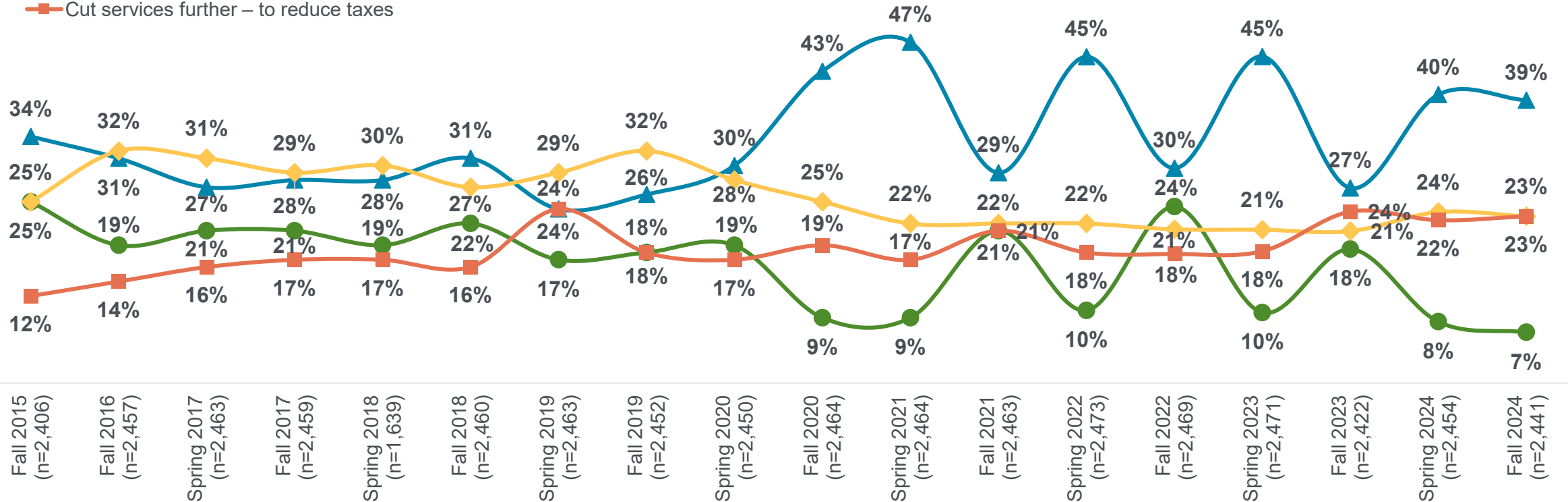
\*Rounding

↑/↓ Statistically higher/lower than spring 2024



# Tracking – Balancing taxation and service delivery

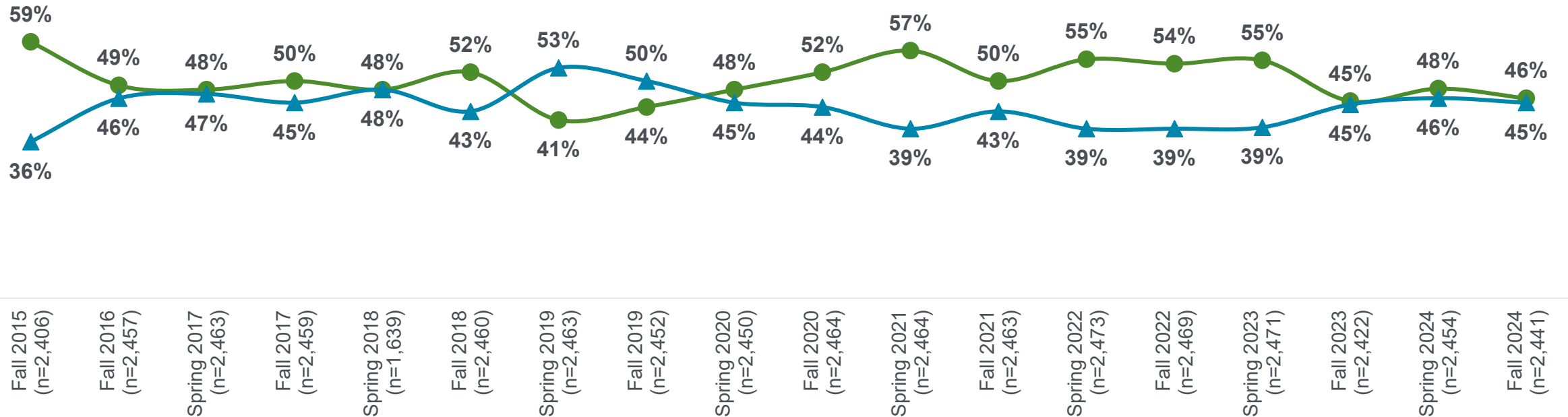
- Increase taxes beyond current inflation rate – to expand services
- ▲ Increase taxes at current inflation rate – to maintain services at current levels
- ◆ Cut services – to maintain current tax level
- Cut services further – to reduce taxes





# Tracking – Increase taxes vs. cut services

- Increase taxes at or beyond current inflation rate – to maintain or expand services
- ▲ Cut services – to maintain current or reduce tax level







# Perceptions of service delivery and input from Calgarians

# Summary of findings: Communication at The City

## **The City's communication and customer service ratings remain stable, including meeting service expectations and responsiveness.**

- The City's communication with Calgarians about its services, programs, policies, and plans continues to garner positive ratings from three-fifths (60%) of residents, consistent with fall 2023 (63%). However, there has been a shift in the intensity of these opinions. The proportion of Calgarians who 'strongly' agree that The City does a good job communicating has increased statistically in fall 2024 (19%) compared to fall 2023 (16%), offset by a corresponding decrease in 'somewhat' agree ratings. At the same time, there has been a statistical increase in the proportion who 'strongly disagree' with this statement, rising to 17% in fall 2024 from 12% in fall 2023.
- Calgarians remain largely satisfied with the customer service they receive from The City, with three-quarters (74%) 'satisfied with the overall level and quality of customer service provided by The City of Calgary,' consistent with fall 2023 (75%).
- Furthermore, The City is fulfilling residents' service needs. Seven-in-ten (70%) agree that 'The City of Calgary meets their customer service expectations,' consistent with from spring 2024 (73%) and fall 2023 (73%).
- When it comes to the timeliness of The City's response to inquiries, around three-fifths (62%) of Calgarians agree 'The City responds quickly to requests and concerns,' on par with spring 2024 (63%) and fall 2023 (61%).

# Summary of findings: Perceptions of input from Calgarians

## **Perceptions of The City's public engagement efforts have declined. Fewer Calgarians feel their input is used in decision making.**

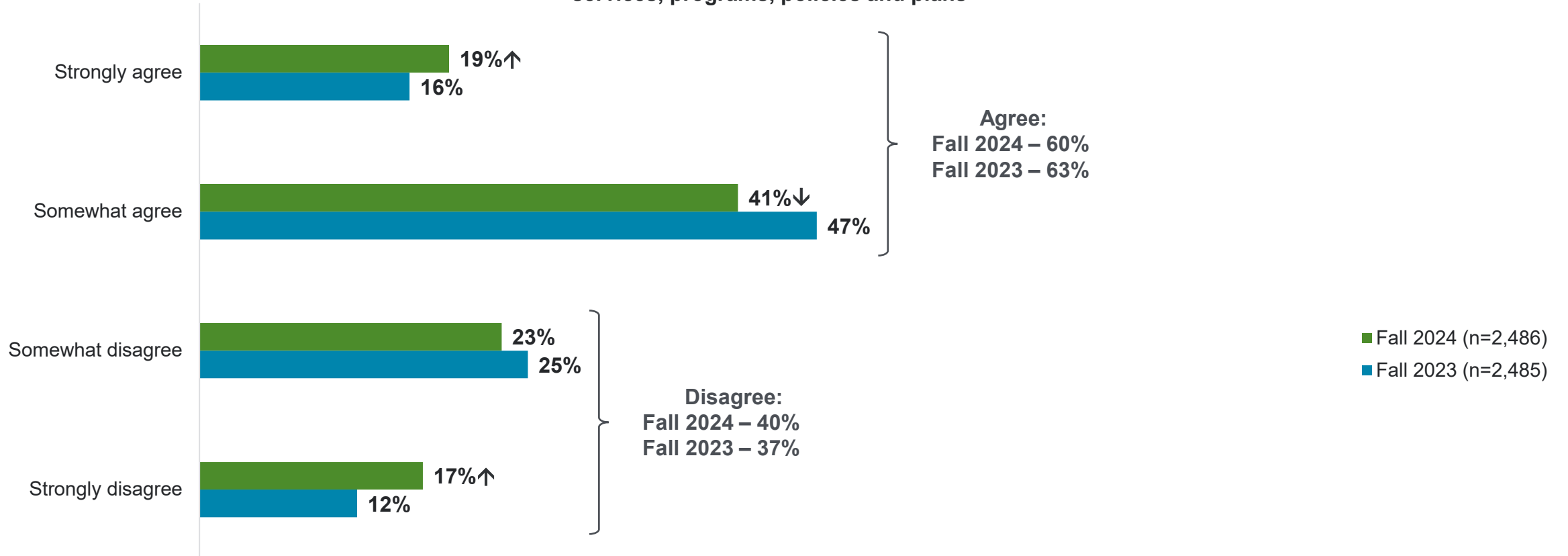
- Calgarians' confidence in The City's efforts of incorporating public feedback into decision-making has declined slightly. Around one-half (53%) believe that The City is working to improve how it includes input from Calgarians, a statistical decrease from spring 2024 (57%) and fall 2023 (59%).
- Similarly, one-half (50%) agree that The City uses input from Calgarians in decision making about City programs and services, down from spring 2024 (58%) and fall 2023 (54%). This is echoed by the one-half (49%) who agree 'The City allows Calgarians to have meaningful input into decision making.' This is statistically lower than spring 2024 (53%) but on par with fall 2023 (51%).
- Calgarians are also divided on whether there are sufficient engagement opportunities, with one-half (50%) agreeing that Calgarians have enough chances to provide input on City projects and services. This is consistent with fall 2023 (52%) but has declined since spring 2024 (56%).



# Communicating about services, programs, policies and plans

Question introduced fall 2023

The City does a good job of communicating with Calgarians about services, programs, policies and plans

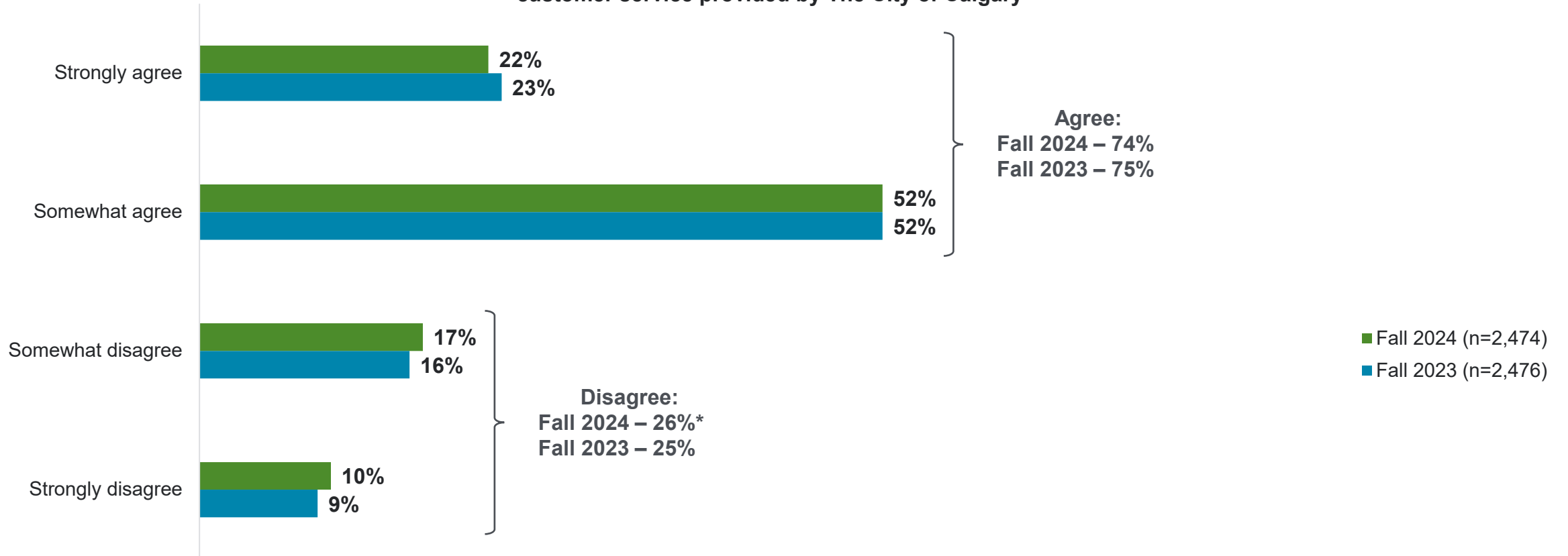


↑/↓ Statistically higher/lower than fall 2023



# Satisfaction with the overall level and quality of customer service

I am satisfied with the overall quality of customer service provided by The City of Calgary

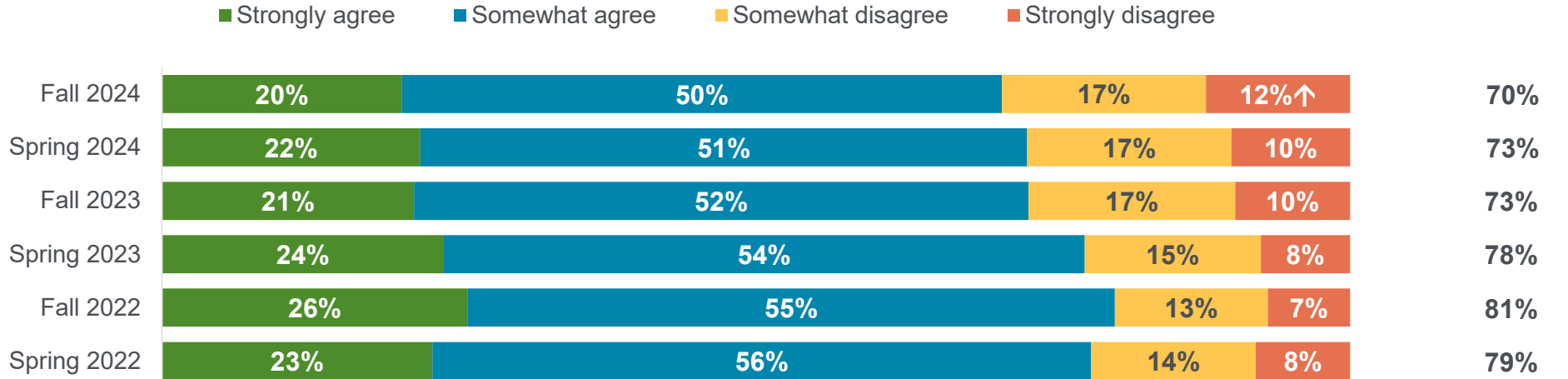


\*Rounding

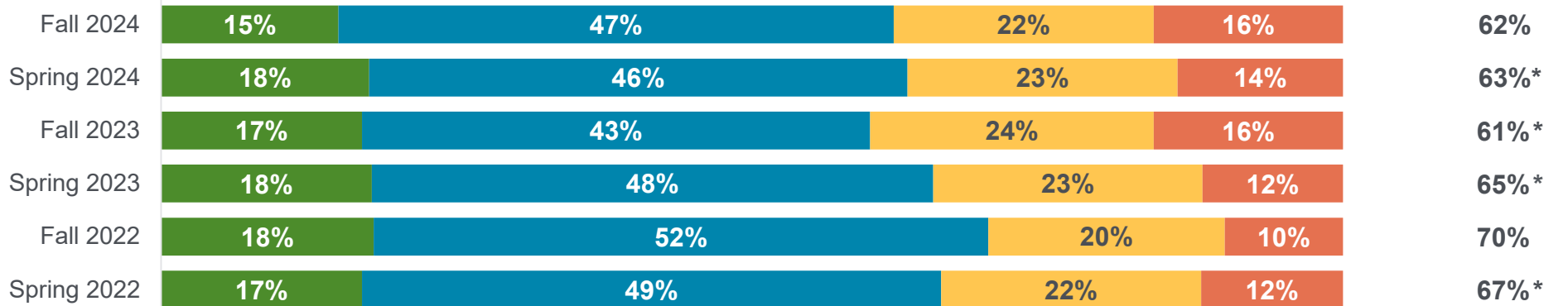


# Attitudes regarding customer service

The City of Calgary meets my customer service expectations



The City responds quickly to requests and concerns



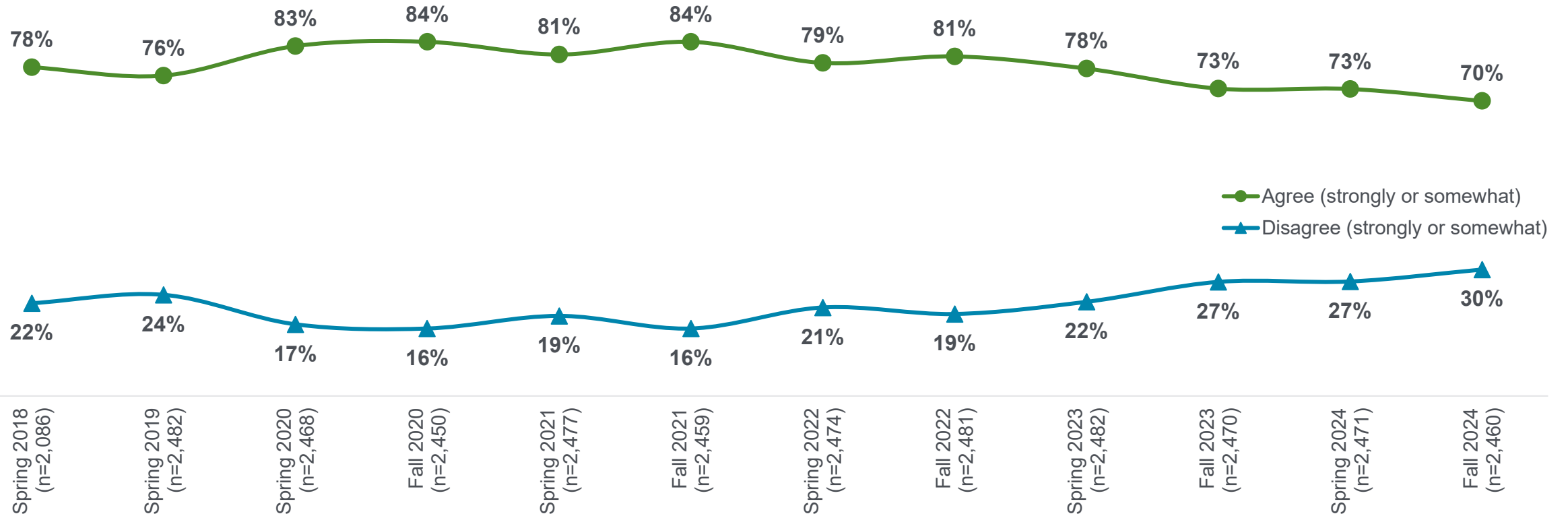
Q. Thinking about your dealings with The City of Calgary, your general impressions and things you may have read, seen or heard, please tell me if you agree or disagree with each of the following statements.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than spring 2024



# Tracking – Meeting customer service expectations

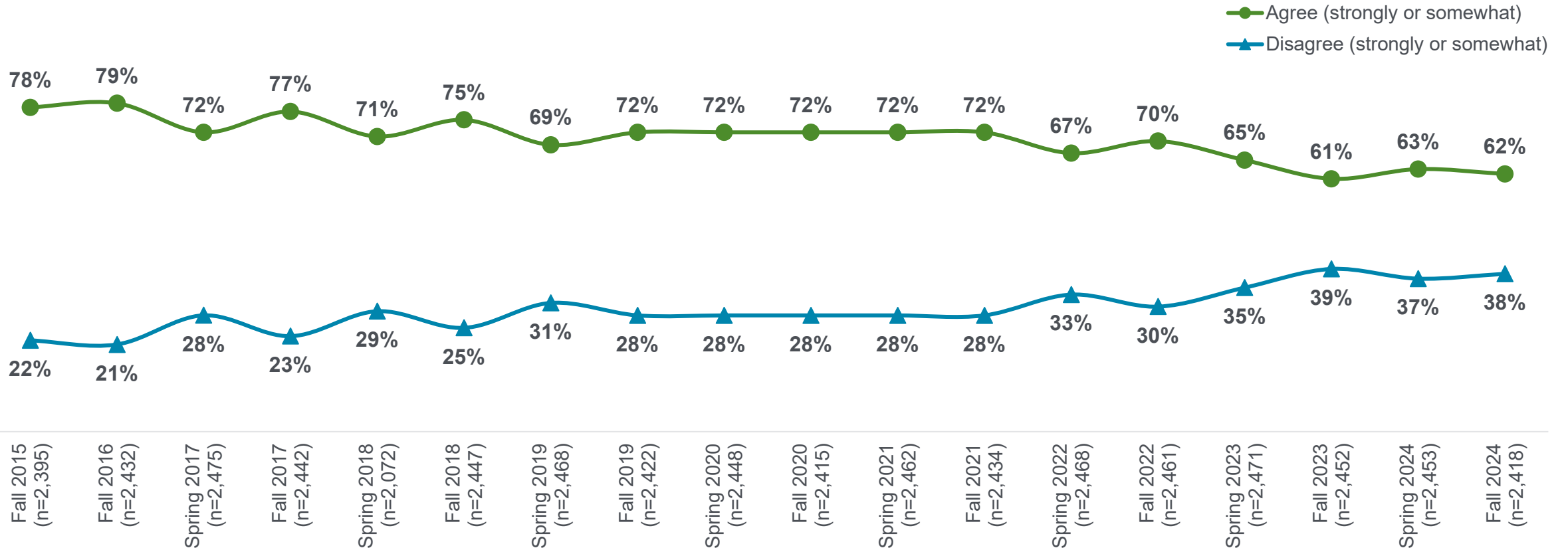
The City of Calgary meets my customer service expectations





# Tracking – Customer service responsiveness

The City responds quickly to requests and concerns



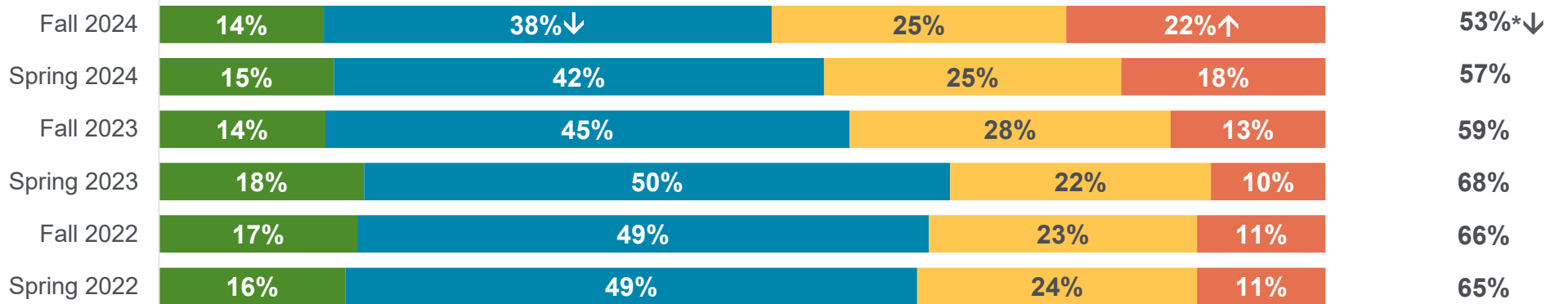




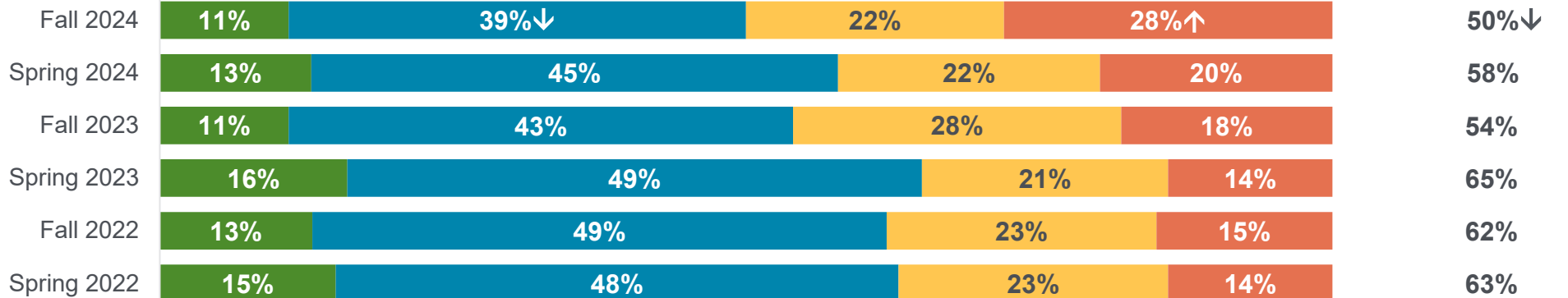
# Perceptions of input

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

I am confident that The City of Calgary is working to improve how it includes Calgarians' input into important decisions



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



Q. Thinking about your dealings with The City of Calgary, your general impressions and things you may have read, seen or heard, please tell me if you agree or disagree with each of the following statements.

Q. Please tell me if you agree or disagree with each of the following statements.

Base: Valid respondents (bases vary)

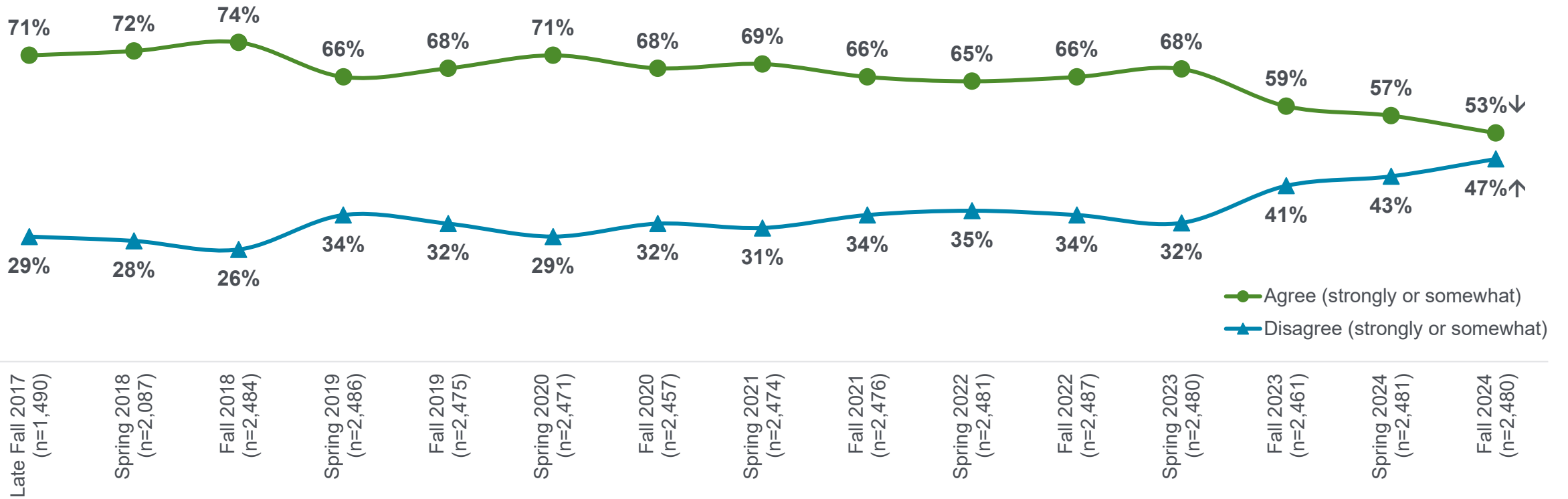
\*Rounding

↑/↓ Statistically higher/lower than spring 2024



# Tracking – Confidence in integration of Calgarians’ input

I am confident that The City of Calgary is working to improve how it includes Calgarians’ input into important decisions

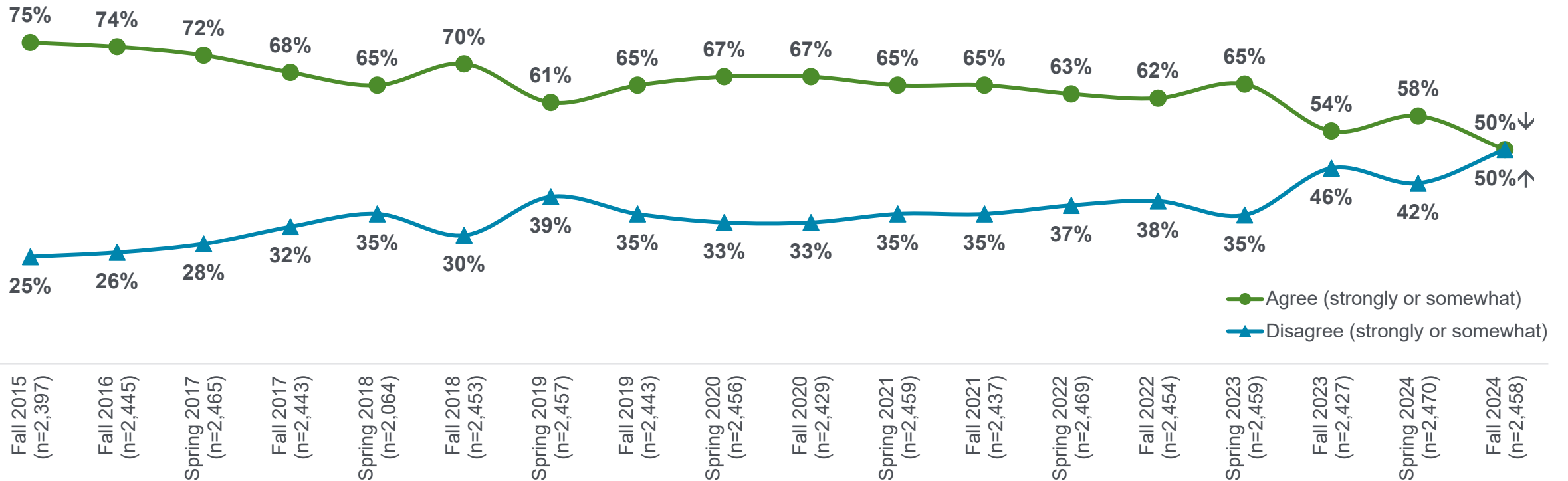


↑/↓ Statistically higher/lower than spring 2024



# Tracking – Use of Calgarians’ input in decision making

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

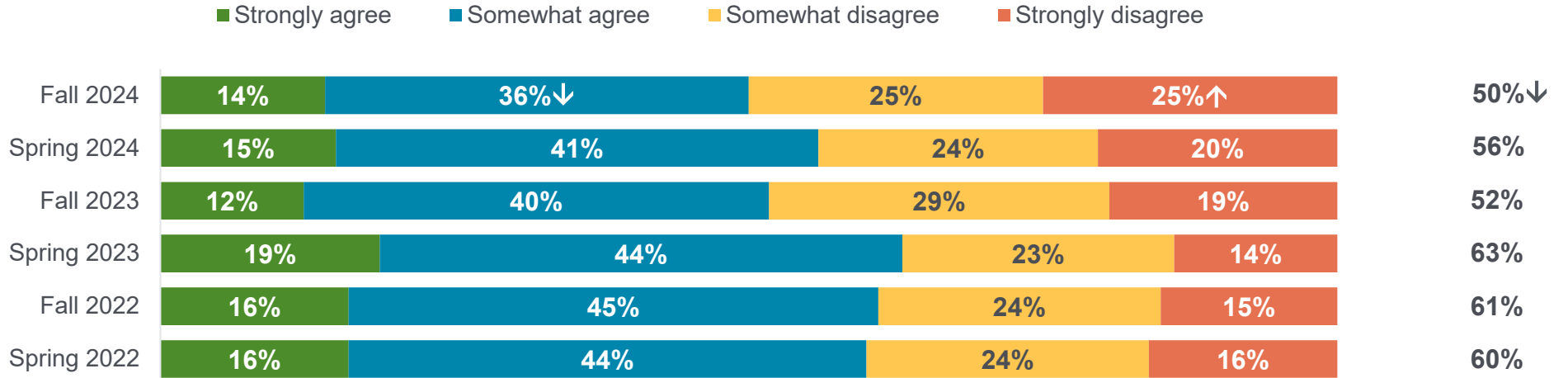


↑/↓ Statistically higher/lower than spring 2024

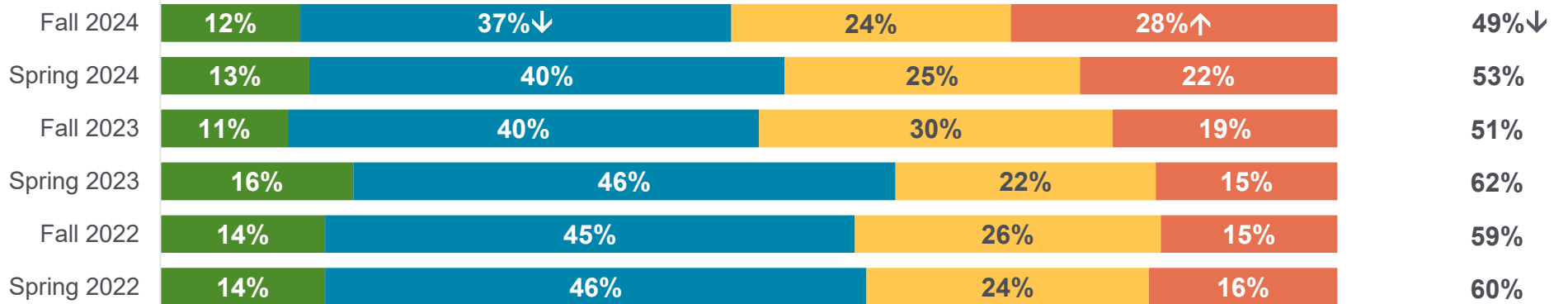


# Perceptions of input (continued)

Calgarians have enough opportunities to provide input into decision making about City projects and services



The City allows Calgarians to have meaningful input into decision making



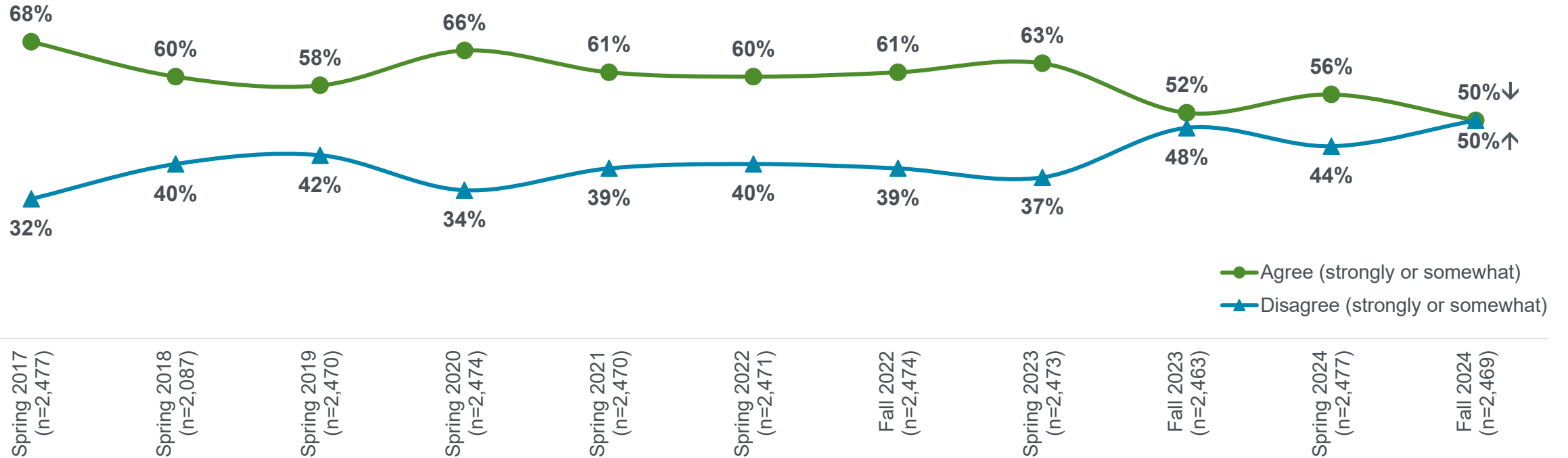
Q. Thinking about your dealings with The City of Calgary, your general impressions and things you may have read, seen or heard, please tell me if you agree or disagree with each of the following statements.  
Base: Valid respondents (bases vary)

↑/↓ Statistically higher/lower than spring 2024



# Tracking – Enough opportunities for input

Calgarians have enough opportunities to provide input into decision making about City projects and services

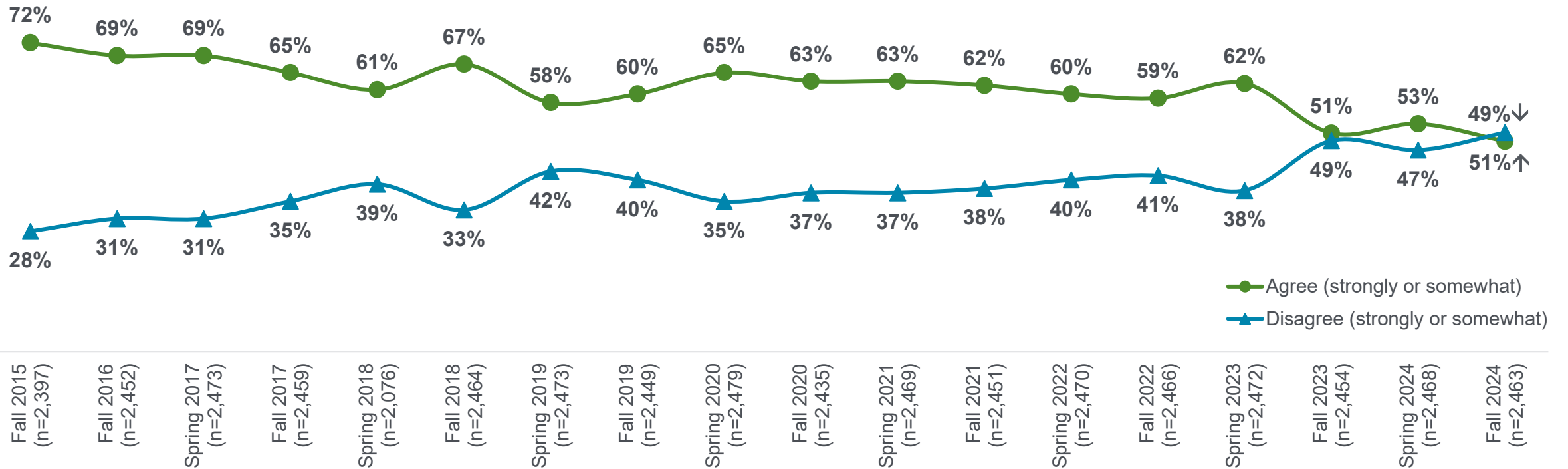


↑/↓ Statistically higher/lower than spring 2024



# Tracking – Allowing Calgarians to have meaningful input

The City allows Calgarians to have meaningful input into decision making



↑/↓ Statistically higher/lower than spring 2024



# City reputation and performance

# Summary of findings: City reputation and performance

**Calgarians' trust in The City and contentment with City Council have steadied following a drop in spring 2024 but remain lower than in past years. Satisfaction with the performance of The City overall and City Administration have declined since the spring.**

- Trust in The City of Calgary remains low, with two-fifths (41%) of Calgarians conveying trust, consistent with spring 2024 (38%) but still down from fall 2023 (46%). Conversely, 30% say they 'distrust' The City, consistent with spring 2024 (32%) and statistically higher than fall 2023 (23%). The remaining 31% have a neutral stance, consistent with spring 2023 (29%) and fall 2022 (31%).
- This lack of trust is reflected in Calgarians' satisfaction with the way The City is run. Around one-half (53%) are satisfied with the way The City of Calgary (encompassing both Council and Administration) runs the city, statistically lower than spring 2024 (59%) and fall 2023 (62%), the decline observed in spring 2024 has persisted through the fall.
- Satisfaction with City Administration has also declined this wave, with more than three-fifths (63%) satisfied with the way 'City Administration (excluding City Council) is going about running our City.' This is a statistical decrease from both spring 2024 (71%) and fall 2023 (69%).
- Around one-half (46%) of Calgarians are satisfied with the way 'City Council (excluding City Administration) is going about running our City,' on par with spring 2024 (49%) but still down from fall 2023 (55%). The decline in satisfaction with Council that occurred in the spring has stabilized, with no further reductions in the fall.



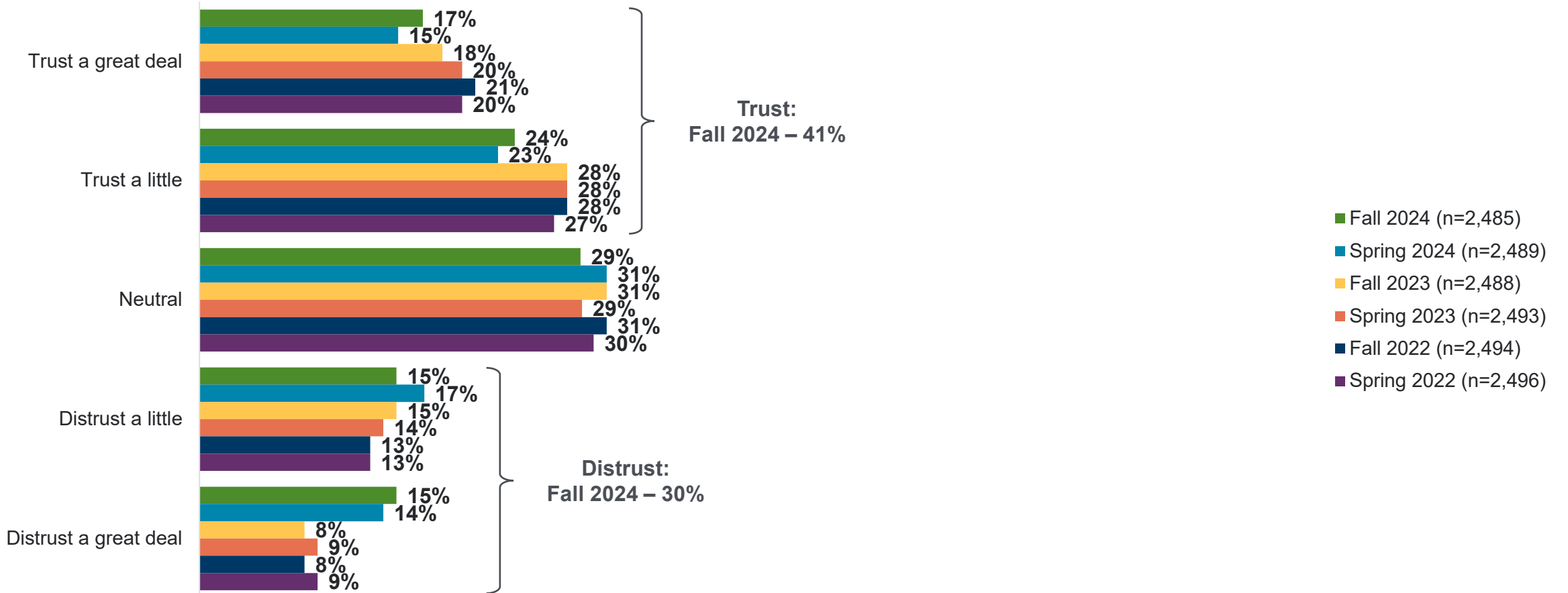
# Summary of findings: City reputation and performance

## **Calgarians' evaluations of The City of Calgary's governance, responsiveness, collaboration, and financial management have become less favourable since the spring.**

- Perceptions of The City of Calgary's openness, accessibility, and responsiveness have declined over the past year. More than one-half (56%) of Calgarians believe that 'The City of Calgary practices open and accessible government,' a statistical decline from spring 2024 (61%) and fall 2023 (62%). Similarly, 56% agree 'The City of Calgary is responsive to the needs and expectations of Calgarians,' also marking a statistical decline from fall 2023 (61%).
- Perceptions of collaboration between City Council and City Administration have also weakened. Around one-half (54%) 'believe that City Council and City Administration work collaboratively to make the best possible decisions for the future of Calgary,' statistically lower than both spring 2024 (58%) and fall 2023 (59%).
- Calgarians' confidence in The City's fiscal responsibility has seen a slight drop as well with around one-half (45%) believing that 'The City of Calgary manages its spending in a responsible way that reflects the needs and priorities of Calgarians,' a statistical decrease from spring 2024 (48%) and fall 2023 (51%).



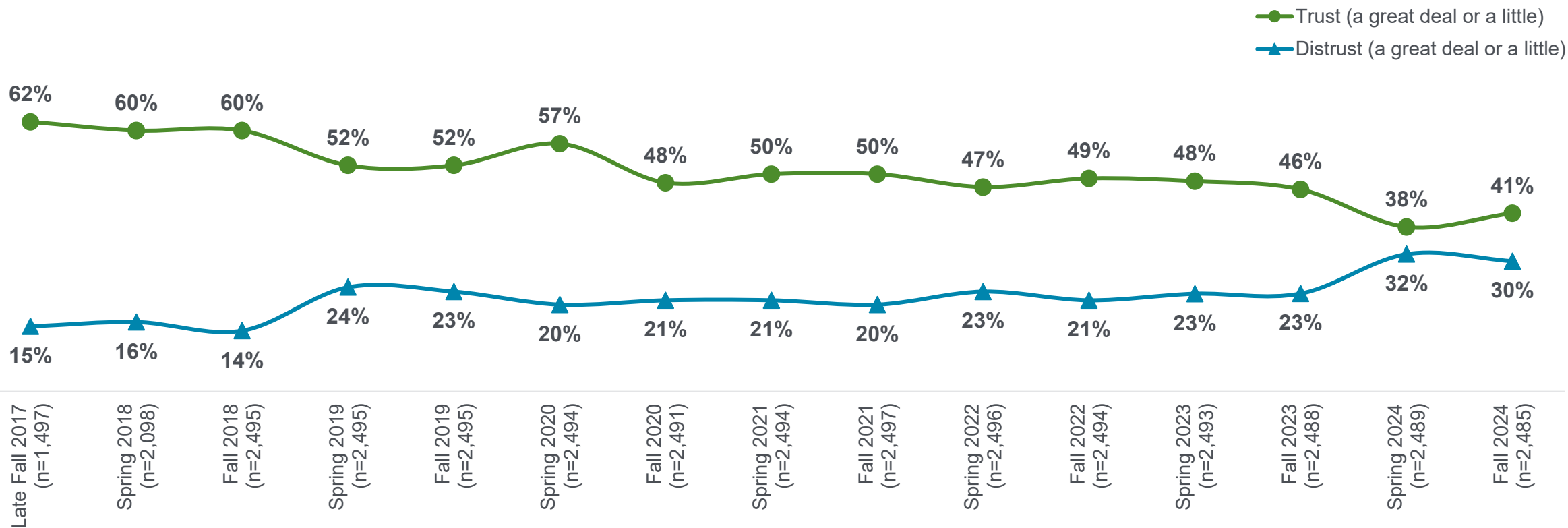
# Trust in The City of Calgary





# Tracking – Trust in The City of Calgary

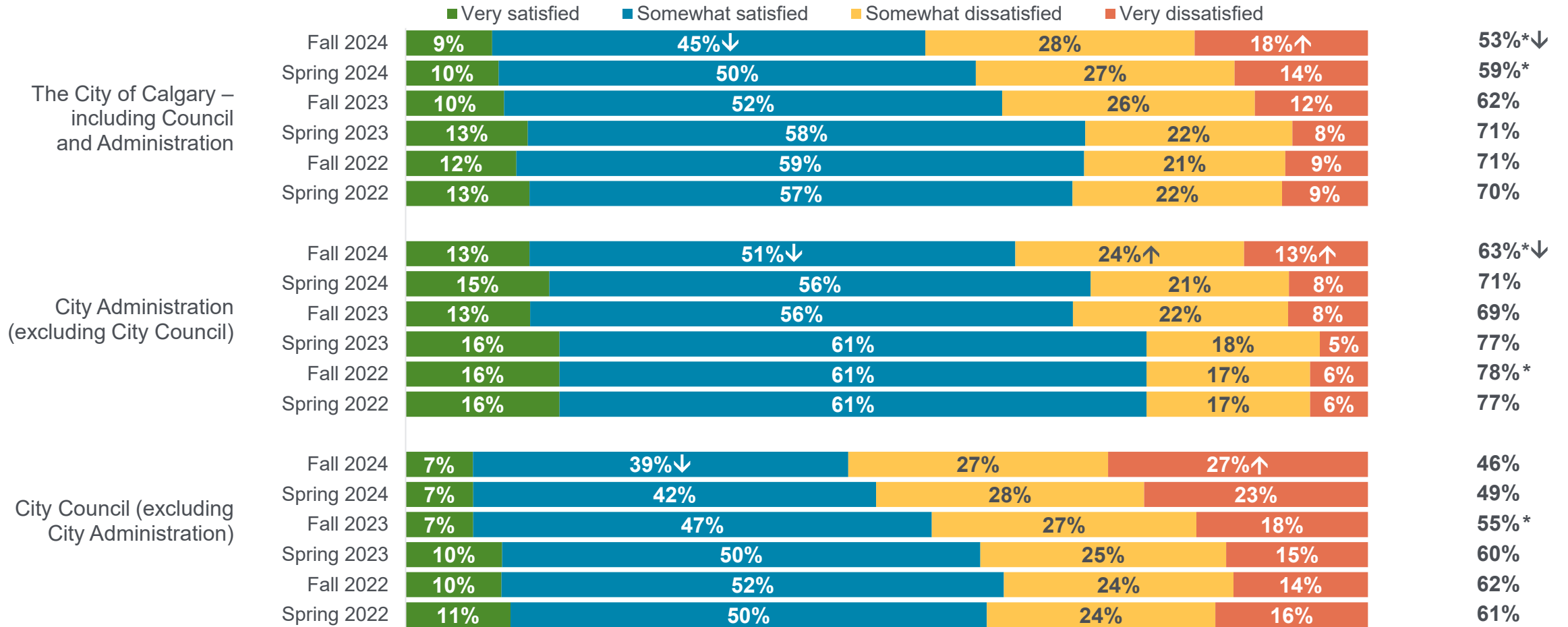
Trust/distrust The City of Calgary





# Perceptions about City performance

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



\*Rounding

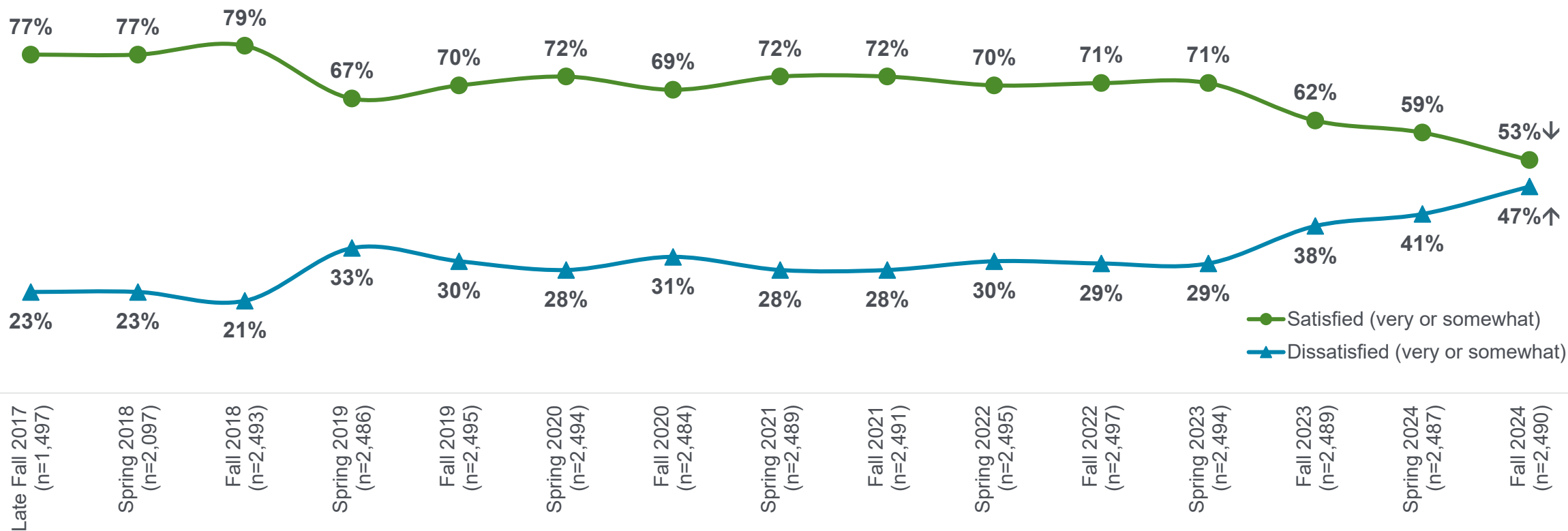
↑/↓ Statistically higher/lower than spring 2024

Q. Taking everything into account, how satisfied or dissatisfied are you with the way [INSERT] is going about running our city?  
Base: Valid respondents (bases vary)



# Tracking – City of Calgary performance

Satisfaction with the way The City of Calgary – including Council and Administration as a whole – is running our city

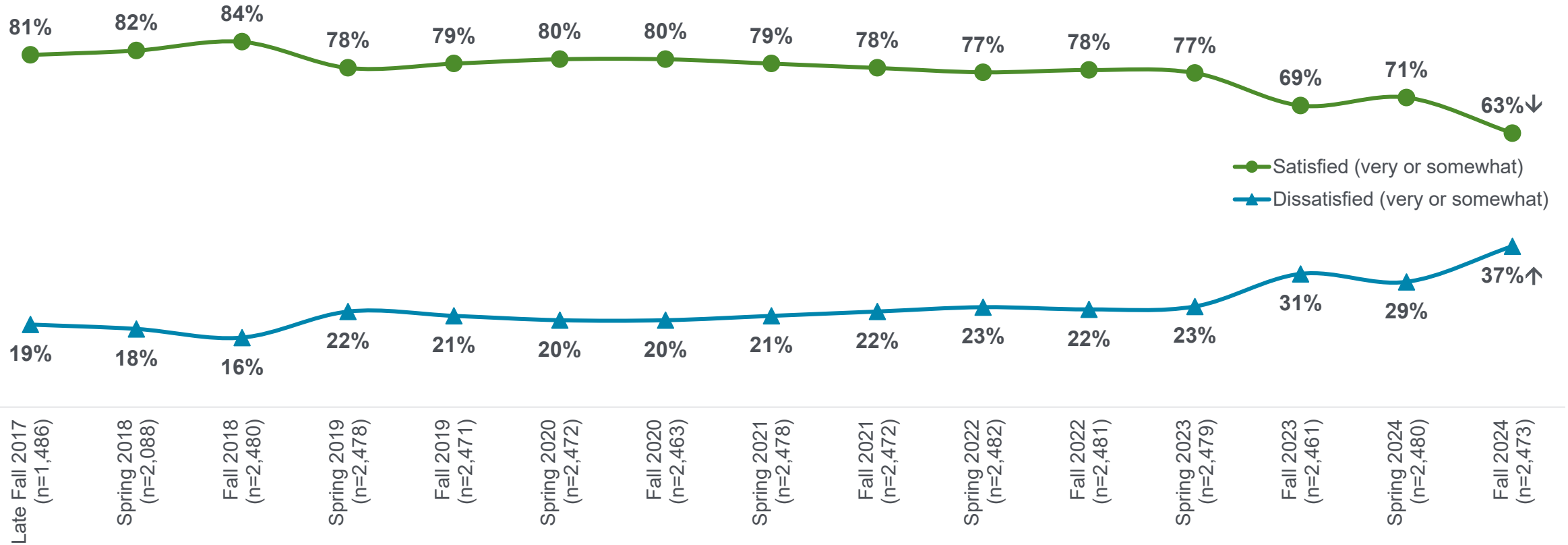


↑/↓ Statistically higher/lower than spring 2024



# Tracking – Performance of City Administration

Satisfaction with the way Calgary’s City Administration, excluding Council, is running our city

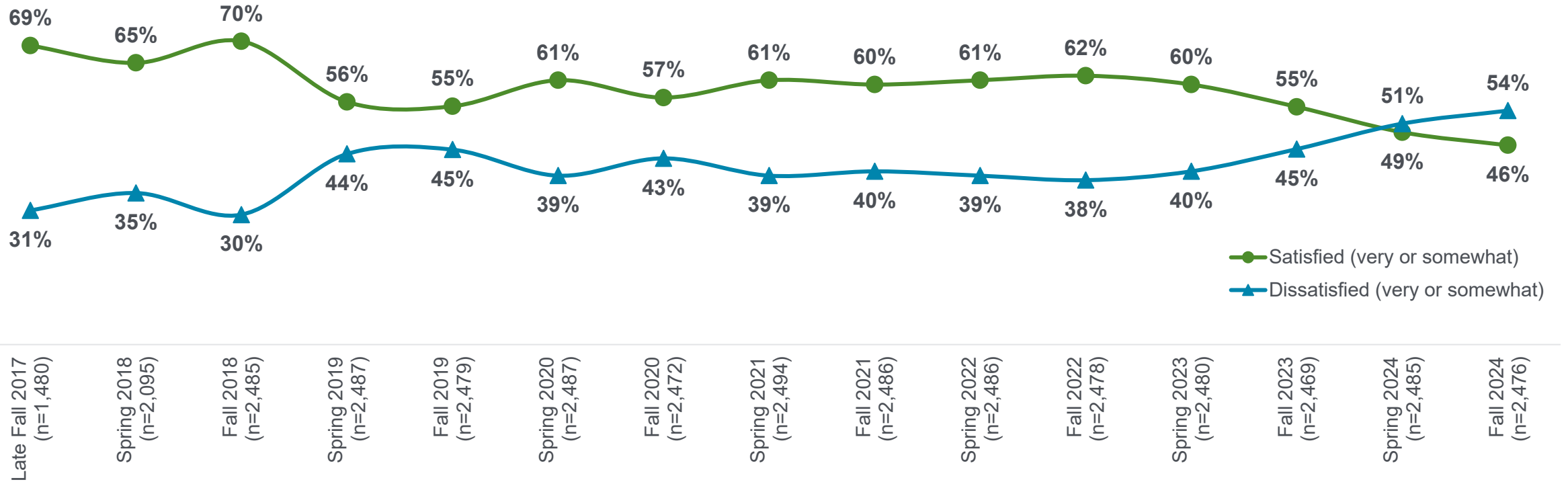


↑/↓ Statistically higher/lower than spring 2024



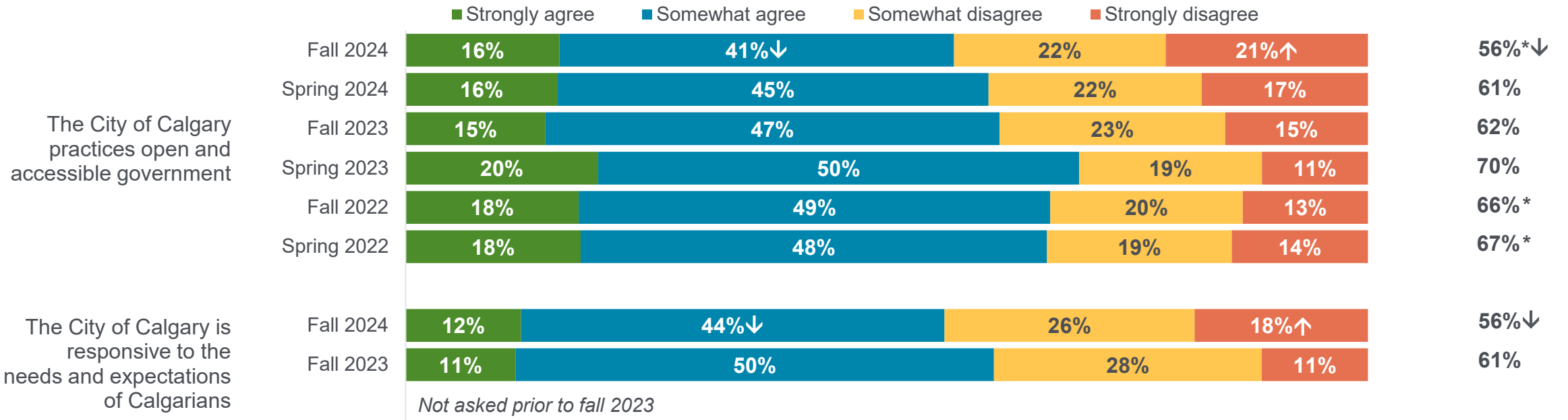
# Tracking – Performance of City Council

Satisfaction with the way Calgary’s City Council, excluding City Administration, is running our city





# Attitudes regarding The City



Q. Thinking about your dealings with The City of Calgary, your general impressions and things you may have read, seen or heard, please tell me if you agree or disagree with each of the following statements?  
Base: Valid respondents (bases vary)

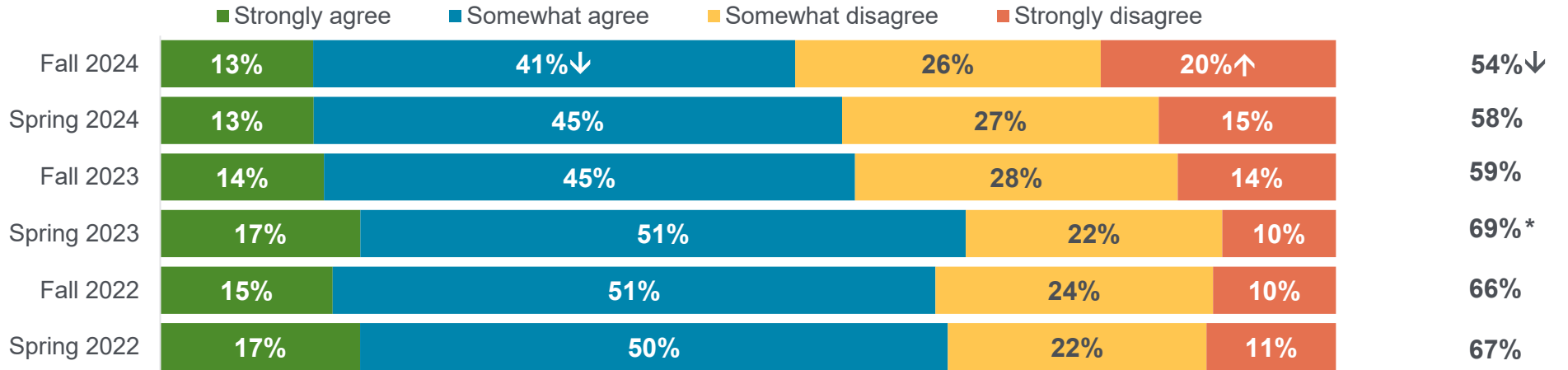
\*Rounding  
↑/↓ Statistically higher/lower than spring 2024/fall 2023



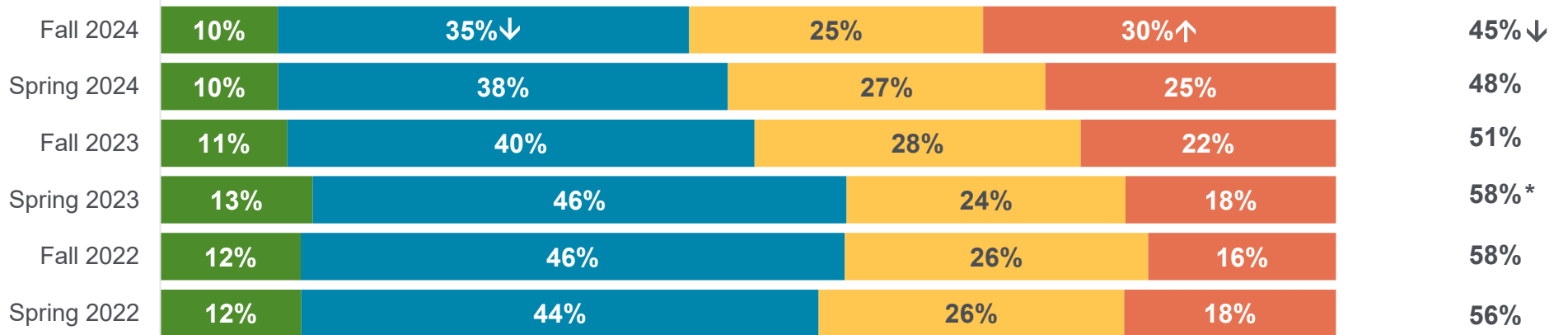


# Attitudes regarding The City (continued)

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



The City of Calgary manages its spending in a responsible way that reflects the needs and priorities of Calgarians



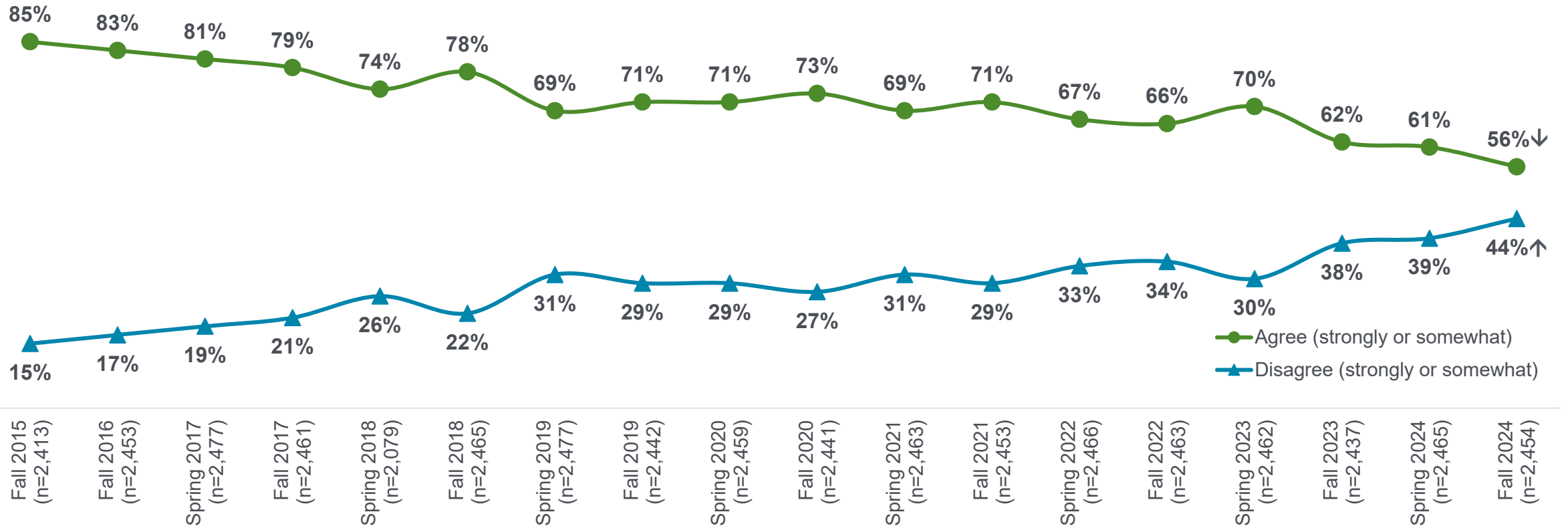
Q. Please tell me if you agree or disagree with each of the following statements.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than spring 2024



# Tracking – Open and accessible government

The City of Calgary practices open and accessible government

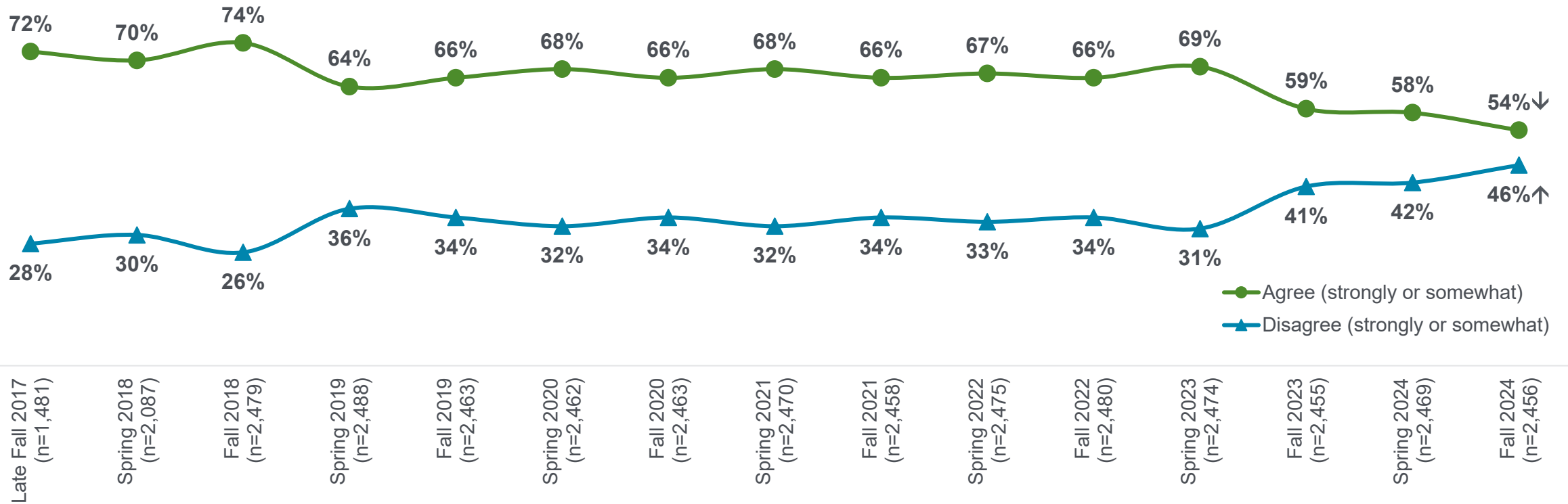


↑/↓ Statistically higher/lower than spring 2024



# Tracking – City Council and City Administration work collaboratively

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

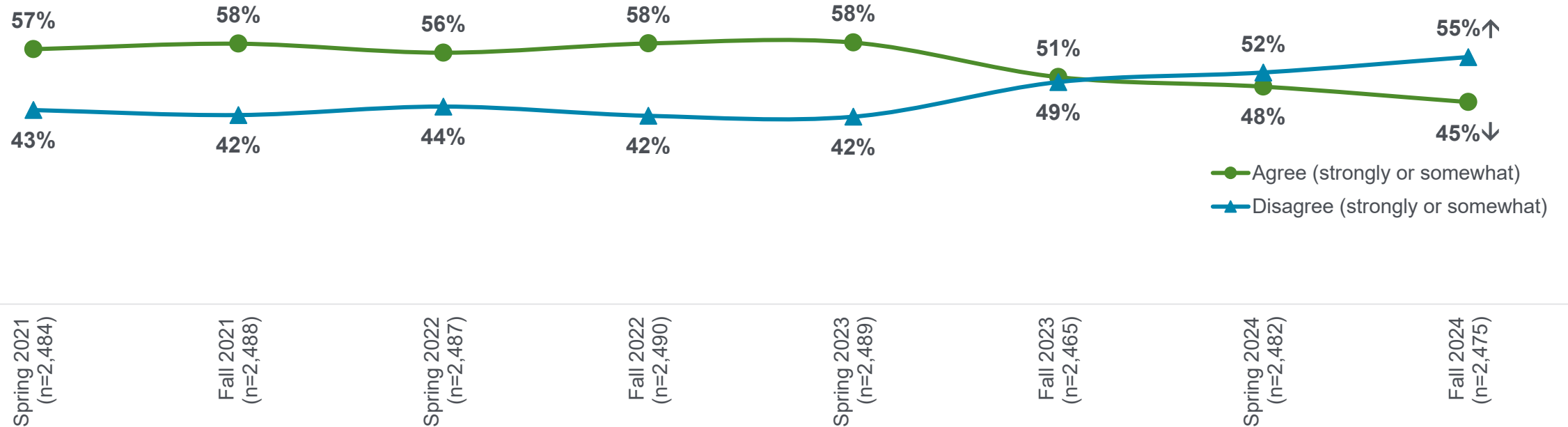


↑/↓ Statistically higher/lower than spring 2024



# Tracking – The City manages its spending in a responsible way

The City of Calgary manages its spending in a responsible way that reflects the needs and priorities of Calgarians



↑/↓ Statistically higher/lower than spring 2024



# Council focus areas

# Summary of findings: Council focus areas

## Calgarians hold positive views of The City's efforts in diversity, attracting new residents, and Indigenous relations.

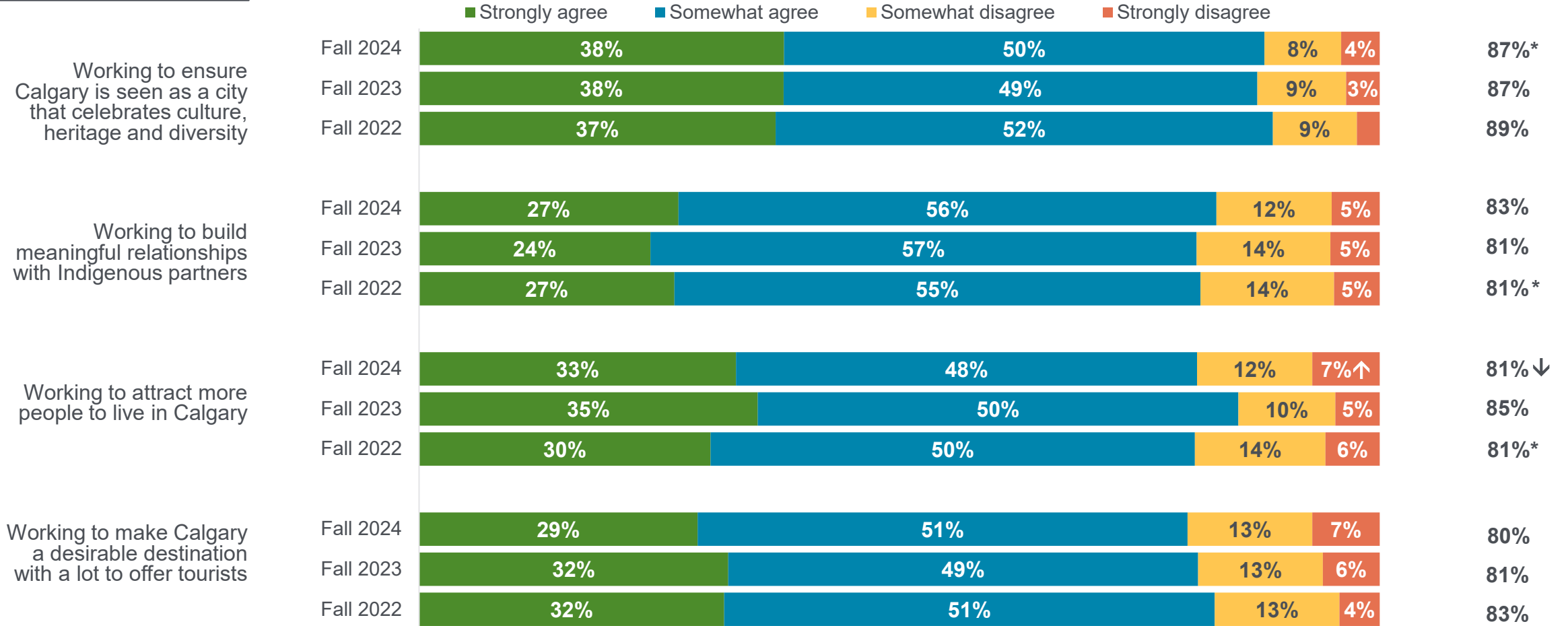
- The City's efforts in diversity, attracting new residents, and Indigenous relations are well received. Around nine-in-ten (87%) agree that The City is doing a good job at 'working to ensure Calgary is seen as a city that celebrates culture, heritage and diversity,' identical to fall 2023. Similarly, four-fifths (80%) agree The City is doing well at 'working to make Calgary a desirable destination with a lot to offer tourists,' on par with fall 2023 (81%).
- However, there has been a slight decline in perceptions of The City's effectiveness in attracting new residents. Four-fifths (81%) agree The City is doing a good job at 'working to attract more people to live in Calgary,' statistically lower than fall 2023 (85%).
- The City's efforts to build relationships with Indigenous communities are viewed favourably by most Calgarians. More than four-fifths (83%) believe The City is 'working to build meaningful relationships with Indigenous partners,' on par with fall 2023 (81%). Moreover, nearly three-quarters (73%) agree The City is doing a good job at 'working with local Indigenous communities when discussing downtown revitalization,' a statistical increase from fall 2023 (69%).
- In terms of economic development, nearly two-thirds (64%) of Calgarians believe The City is 'working to find ways to make it easier to do business in Calgary,' although this is statistically lower than fall 2023 (68%).
- Perceptions of The City's collaboration with community partners to address social issues are more mixed. Three-fifths (59%) agree The City is doing a good job at 'working with community partners to address social issues such as mental health,' on par with fall 2023 (57%).



# Perceptions The City is doing a good job on Council focus areas

Question introduced fall 2022

Data labels <3% not shown



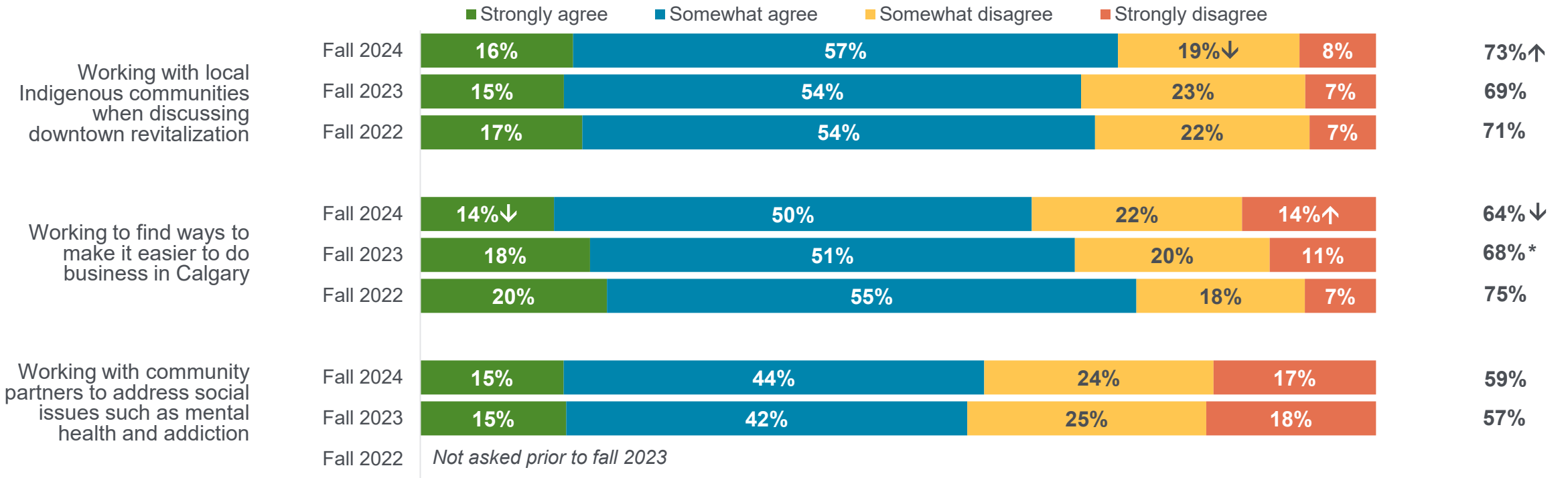
\*Rounding  
↑/↓ Statistically higher/lower than fall 2023

Q. Please tell me if you agree or disagree that The City of Calgary is doing a good job at each of the following.  
Base: Valid respondents (bases vary)



# Perceptions The City is doing a good job on Council focus areas (continued)

Question introduced fall 2022



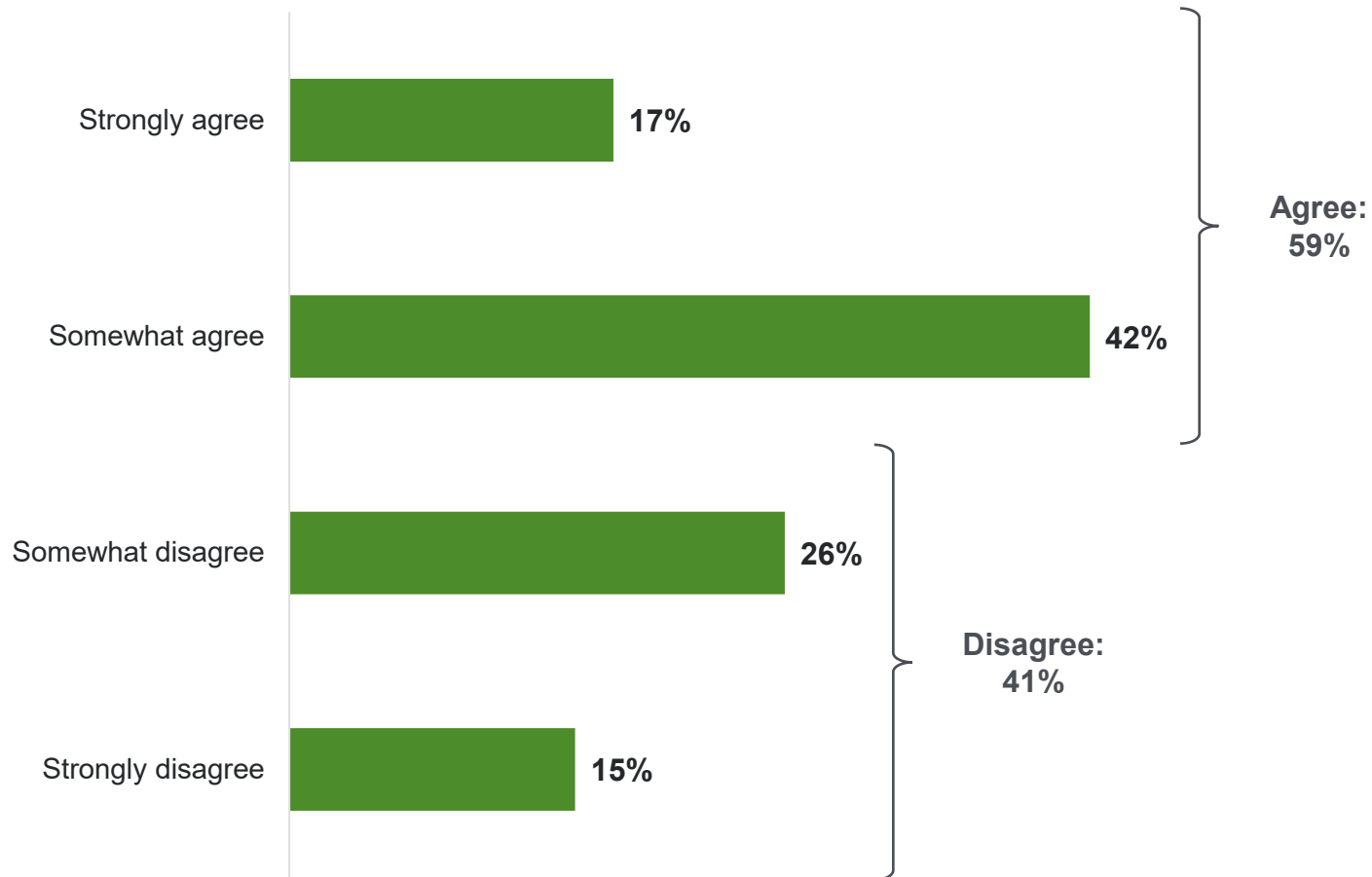
Q. Please tell me if you agree or disagree that The City of Calgary is doing a good job at each of the following.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than fall 2023





# Social equity





# Accessibility and downtown revitalization

# Summary of findings: Housing and affordability

## Concerns about housing affordability and housing accessibility in Calgary drive considerable support for City action and investment.

- Housing affordability is a pressing issue for Calgarians, with nine-in-ten (91%) believing that housing is too expensive for the average resident, consistent with fall 2023 (92%).
- More than four-fifths (86%) feel The City should explore ways to make home ownership more achievable for all Calgarians, statistically lower than fall 2023 (90%). The intensity of agreement has also softened, with 'strong' agreement dropping to 63% from 70% in fall 2023.
- Similarly, over four-fifths (85%) believe 'The City should invest more in affordable housing programs for low-income Calgarians.' While still high, this sentiment has statistically decreased from fall 2023 (90%), with strong agreement falling to 57% from 68%.
- Support for targeted investment in affordable housing programs for Indigenous Calgarians is also high, with three-quarters (74%) in agreement. However, this also sees a statistical drop from fall 2023 (81%). In particular, 'strong' agreement has declined to 40% from 50% in fall 2023.
- The low perception of current access to suitable housing may be a key factor driving the strong support for City action on affordability. Only three-in-ten (31%) Calgarians agree that all residents currently have access to housing that meets their needs, on par with fall 2023 (30%).

# Summary of findings: Transit

## **Calgarians are feeling better about the price and safety of Calgary's public transportation. Investment in transit expansion and transit safety continue to be important to Calgarians.**

- Calgarians overwhelmingly agree that The City should invest more to address transit safety issues, with around nine-in-ten (92%) in agreement, identical to fall 2023 (92%). However, the intensity of this sentiment has declined, with 'strongly' agree ratings dropping to 56% from 62% in fall 2023.
- The expansion of the CTrain to Calgary's airport is seen as a priority by a vast majority of residents, with nine-in-ten (90%) Calgarians feeling that it is important, unchanged from fall 2023 (90%).
- When it comes to the cost to ride transit, nearly three-quarters (73%) of Calgarians find Calgary Transit fares to be affordable, on par with fall 2023 (71%).
- Perceptions of transit safety show some improvement, with three-fifths (61%) believing that The City is taking sufficient steps to ensure Calgary Transit is a safe travel option, statistically higher than fall 2023 (57%).
- This positive shift is also reflected in Calgarians' feelings of safety when using transit. One-half (50%) say they would feel safe riding a Calgary Transit bus alone at night, a directional improvement over fall 2023 (46%). Similarly, two-fifths (39%) agree they would feel safe riding the CTrain alone at night, a statistical increase from fall 2023 (34%).
- Consistent with these improved safety perceptions, the proportion of Calgarians who avoid taking transit due to personal safety concerns has decreased to one-half (49%), statistically lower than fall 2023 (54%).

# Summary of findings: Mobility

## **Calgarians feel safe using The City's pathways, bikeways and roadways, but fewer say that there are enough alternatives to driving their own vehicles.**

- Calgarians generally feel safe using The City's pathways and bikeways, although there has been a slight decline in these perceptions since fall 2023. Around four-fifths (82%) of Calgarians report feeling safe when 'walking or wheeling on pathways in Calgary,' statistically lower than fall 2023 (85%). Similarly, three-quarters (75%) agree that they 'would feel safe using bikeways in Calgary,' again statistically lower than fall 2023 (83%).
- The City's bikeway and pathway system also encourages active transportation for many residents, with nearly three-quarters (73%) agreeing that it 'encourages them to walk or wheel.' However, this is statistically lower than fall 2023 (77%).
- When it comes to roadway safety, seven-in-ten (70%) Calgarians agree that 'The City's roadways provide a safe experience for users,' based on a new question introduced in fall 2024.
- Despite the generally positive sentiments towards The City's pathways and bikeways, relatively fewer Calgarians (65%) believe that 'The City of Calgary offers sufficient transportation alternatives to travelling by personal vehicle.' This is statistically lower than fall 2023 (70%).

# Summary of findings: Downtown revitalization

## **Downtown revitalization, safety, and vibrancy remain important to Calgarians. There is widespread support for The City to invest in improving the downtown area.**

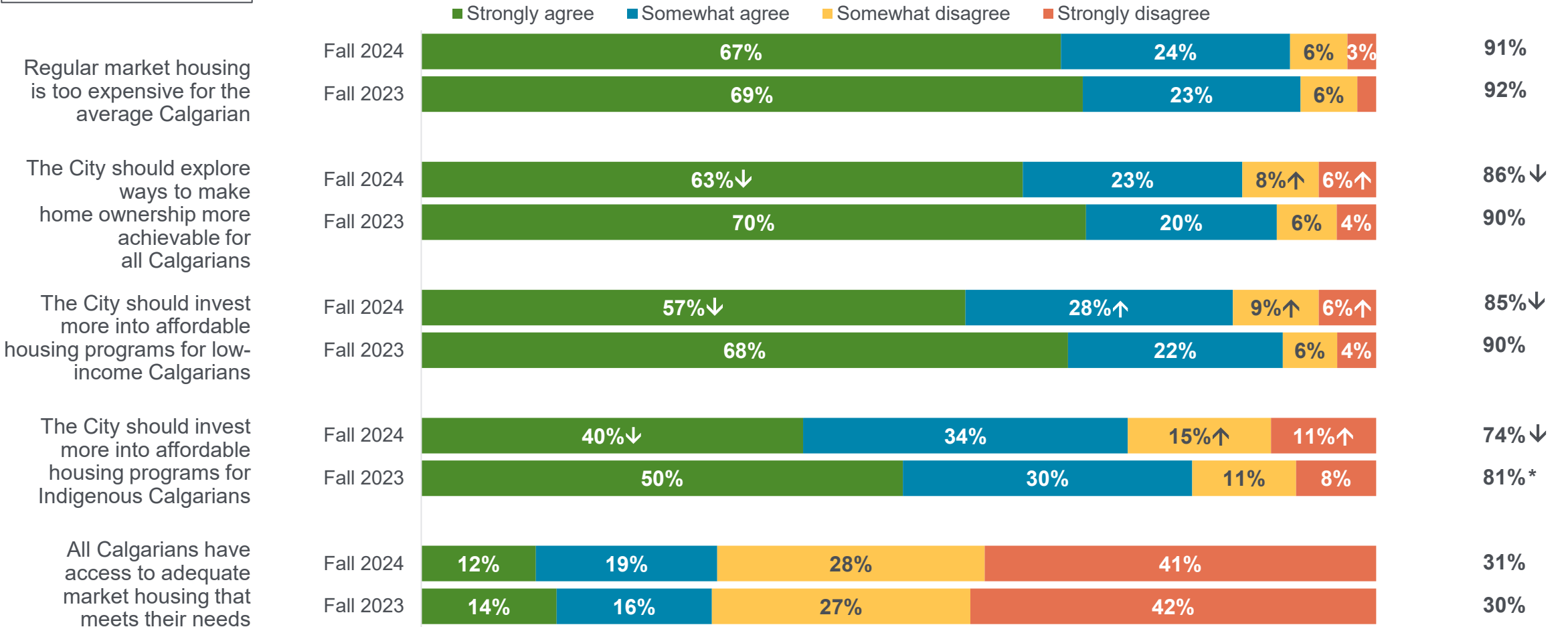
- Seven-in-ten (71%) Calgarians agree that downtown is the heart of Calgary, unchanged from fall 2023 (71%). The perception of downtown as a convenient social destination is less widespread, with around one-half (53%) believing that downtown is a convenient meeting place to socialize with family and friends, identical to fall 2023 (53%).
- Calgarians overwhelmingly agree that The City should prioritize addressing safety issues in Calgary's downtown, with more than nine-in-ten (94%) in agreement. This is identical to fall 2023 (94%). The importance of a vibrant downtown for attracting new investment to Calgary is also widely recognized, with nearly nine-in-ten (88%) Calgarians in agreement. This sentiment remains steady compared to fall 2023 (89%).
- Around seven-in-ten (72%) Calgarians agree that revitalizing Calgary's downtown should take precedence over the next five years, although this is statistically lower than fall 2023 (77%). Consistent with this view, seven-in-ten (71%) feel that The City should be investing more in infrastructure in Calgary's downtown, on par with fall 2023 (69%).



Question introduced fall 2023

Data labels <3% not shown

# Housing and affordability



\*Rounding

↑/↓ Statistically higher/lower than fall 2023

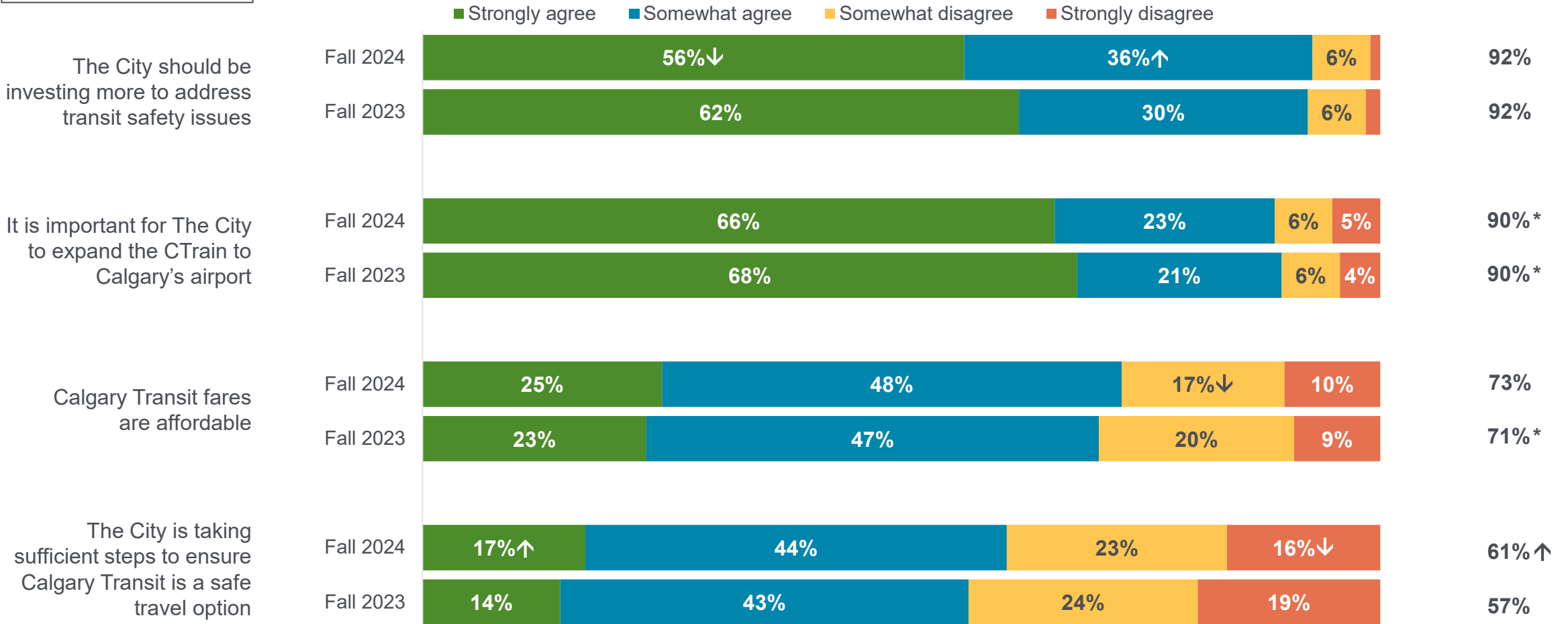
Q. And, for each of the following statements about housing, please tell me to what extent you agree or disagree.  
Base: Valid respondents (bases vary)



# Transit

Question introduced fall 2023

Data labels <3% not shown



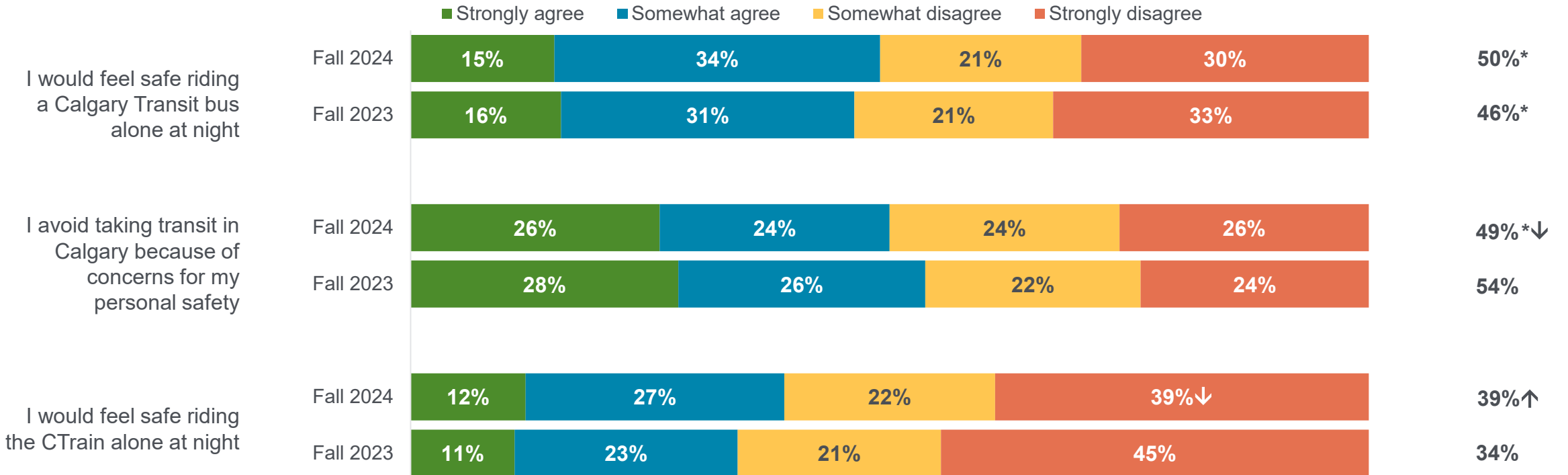
Q. Now we have some questions about transit in general. Please indicate the extent to which you agree or disagree with the following statements, using the same scale.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than fall 2023





# Transit (continued)

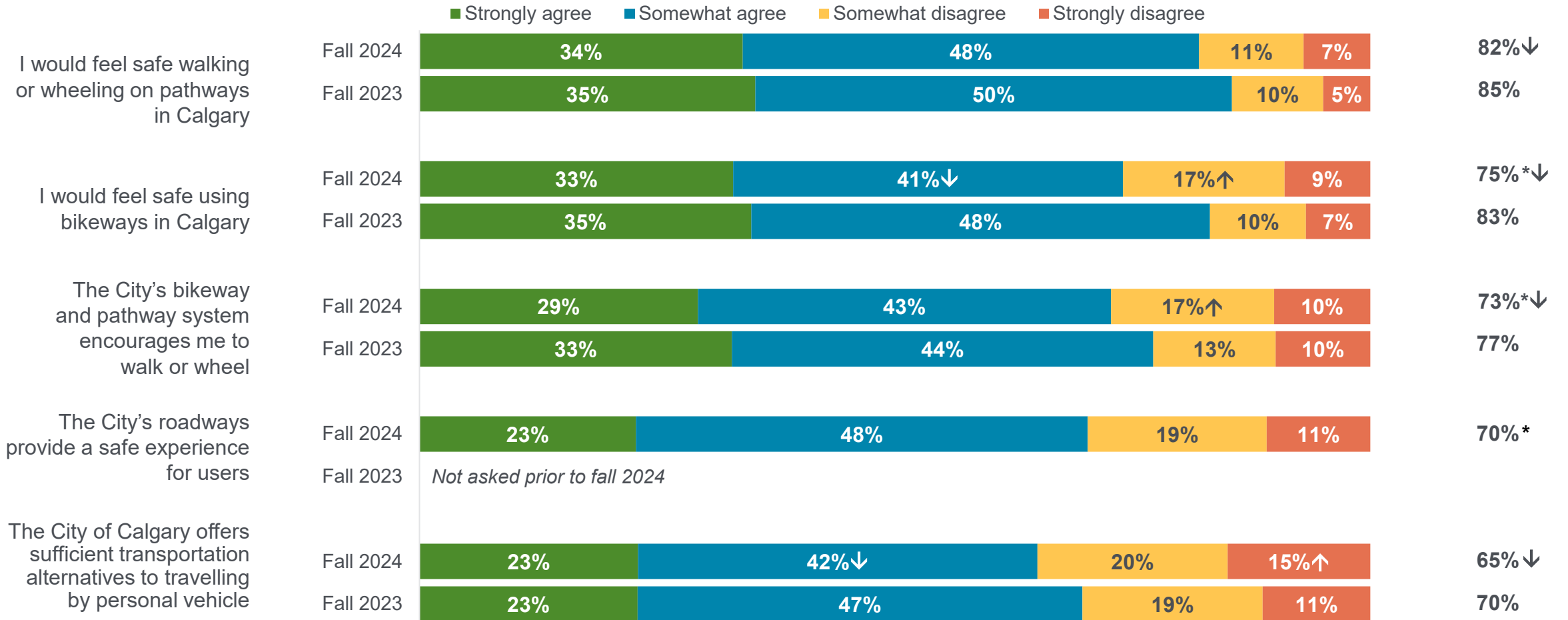


Q. Now we have some questions about transit in general. Please indicate the extent to which you agree or disagree with the following statements, using the same scale.  
Base: Valid respondents (bases vary)

\*Rounding  
↑/↓ Statistically higher/lower than fall 2023



# Mobility



\*Rounding  
↑/↓ Statistically higher/lower than fall 2023

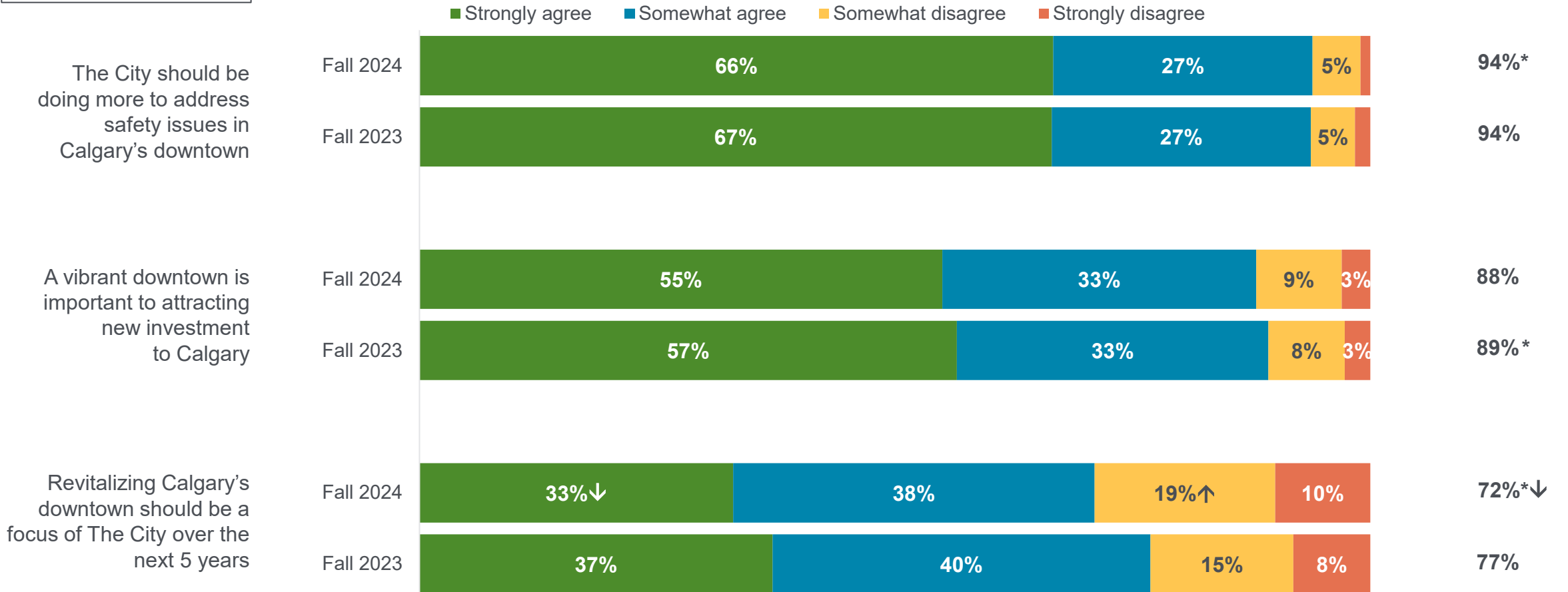
Q. And, we would like to ask you about the extent of your agreement or disagreement with the following statements about mobility in Calgary.  
Base: Valid respondents (bases vary)



Question introduced fall 2023

Data labels <3% not shown

# Downtown revitalization



Q. The next subject we would like your opinion on today is Calgary's downtown. Please tell me the extent to which you agree or disagree with these statements.

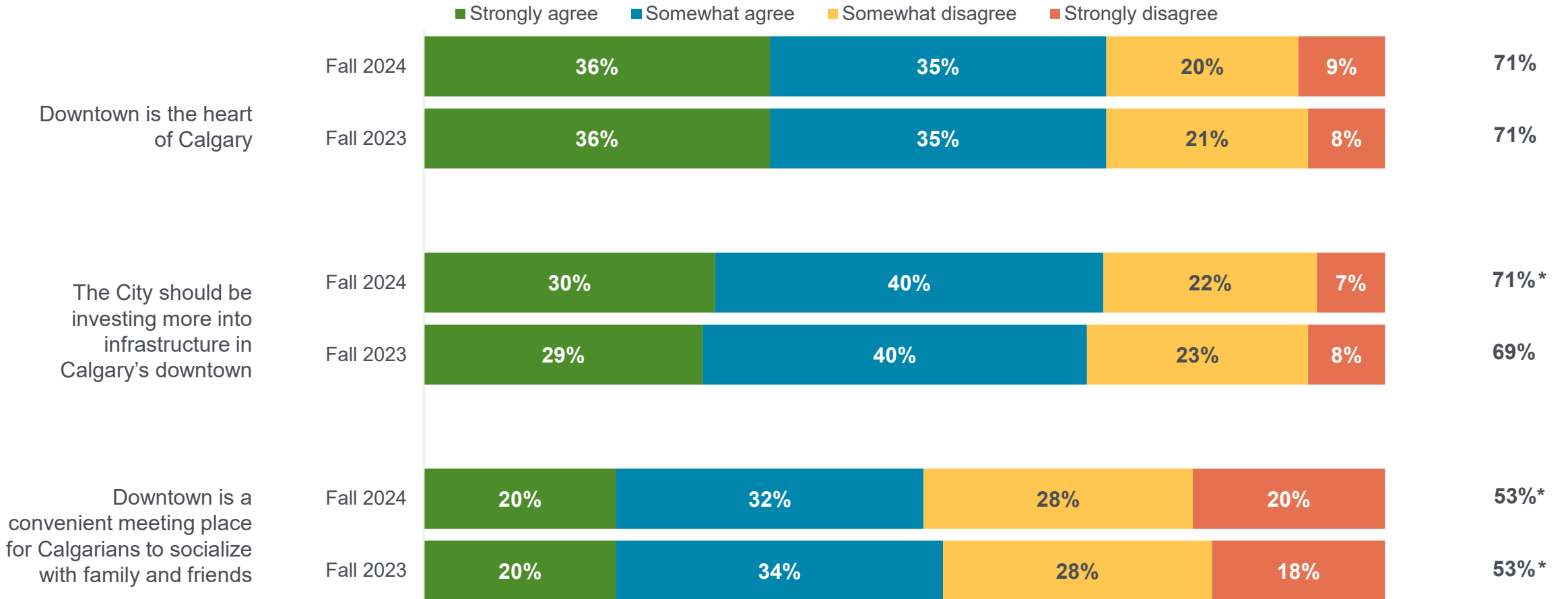
Base: Valid respondents (bases vary)

\*Rounding

↑/↓ Statistically higher/lower than fall 2023



# Downtown revitalization (continued)



Q. The next subject we would like your opinion on today is Calgary's downtown. Please tell me the extent to which you agree or disagree with these statements.

Base: Valid respondents (bases vary)

\*Rounding



# Respondent profile



# Respondent profile

Gender	
Woman (accept female)	50%
Man (accept male)	49%
Non-binary person	<1%
Prefer to self-describe	<1%
Refused/prefer not to say	<1%

Age	
18 to 24	9%
25 to 34	21%
35 to 44	17%
45 to 54	19%
55 to 64	13%
65 or older	21%
MEAN	47.6

Income	
Less than \$60,000	21%
\$60,000 to just under \$120,000	35%
\$120,000 to just under \$200,000	25%
\$200,000 and over	19%

Education	
Less than high school	2%
High school or equivalent	16%
Apprenticeship or trades diploma/certificate	7%
College or non-university diploma/certificate	20%
University degree/diploma/certificate	56%

Employment status <sup>^</sup>	
Full time employed or self employed	55%
Part time employed or self-employed	12%
Retired	21%
Looking after home and/or family	2%
Unable to work because of sickness or disability	3%
Unemployed	5%
Doing unpaid or voluntary work	2%
Student	5%
Other	1%

<sup>^</sup> Multiple responses allowed



# Respondent profile (continued)

Quadrant	
Southwest	30%
Southeast	22%
Northwest	28%
Northeast	20%

Responsible for property taxes or rent	
Yes	87%
No	13%

Own or rent	
Own	72%
Rent	25%
Other	2%

Household size	
1	16%
2	33%
3	18%
4	20%
5 or more	13%
MEAN	5.1

Children or seniors in household	
Yes – children	32%
Yes – seniors	32%

Tenure in Calgary	
Less than 5 years	12%
5 to less than 10 years	5%
10 to less than 15 years	9%
15 to less than 20 years	11%
20 to less than 30 years	21%
30 to less than 40 years	15%
40 or more	28%
MEAN	27.8

Business owner/operator Base: In workforce (n=1466)	
Own and operate a business	18%
Own a business	3%
Operate a business	3%
No	76%



# Respondent profile (continued)

Born in Canada	
Yes	67%
No	33%

Date of arrival in Canada Base: Not born in Canada (n=731)	
Within the past 5 years	28%
More than 5 years ago	72%

Disability in household^	
Yes – myself	12%
Yes – someone in my household	11%
No	79%

Indigenous identity^	
Yes – First Nations	1%
Yes – Métis	2%
Yes – Inuit	<1%
Yes – Prefer to self-describe	<1%
Other	<1%
No	96%

Racialized	
Yes	25%
No	74%
Prefer to self-describe	1%

2SLGBTQIA+	
Yes	7%
No	93%

Ethnicity^	
Canadian/French Canadian	2%
American	4%
British	8%
Western European	6%
Southern or Eastern European	10%
South Asian	18%
East or Southeast Asian	21%
West Asian or Middle Eastern	5%
African	10%
Central/South American or Caribbean	9%
Other	5%
Not stated	5%

Base: Valid respondents (bases vary)

^ Multiple responses allowed





# Contact

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