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REPORT

# BOMA British Columbia

## Downtown Vancouver Safety and Vibrancy Survey

*2024 Survey Results*



DATE: 06/26/2024



# BACKGROUND & OBJECTIVES

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Building Owners and Managers Association (BOMA) locals across Canada are conducting research to better understand the experiences of building owners, property managers, service providers, and tenants in the downtown cores of Canadian municipalities.

In 2024, BOMA engaged with Leger to conduct this research. This research is conducted on behalf of BOMA BC to support informed decision making and ongoing work to improve downtown Vancouver.

The objectives of this research are:

- 1 Understand the current occupancy downtown and return to office initiatives
- 2 Assess the safety and security environment and incidents in and around downtown buildings



# METHODOLOGY

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## Method

**10-minute** online survey programmed and hosted by Leger conducted between May 6<sup>th</sup> and May 31<sup>st</sup>, 2024. Respondents completed the survey online through an email invite.



## Sample

**n=45 Vancouver respondents** completed the survey.

- n=23 Property Managers/Owners
- n=19 Business/Government Tenants
- n=3 Other

*Please note that while n=46 respondents completed the survey, this report only includes those located in Vancouver (n=1 Victoria respondent not included).*



## Analysis

- The numbers presented in this report have been rounded. However, the numbers before rounding were used to calculate the sums presented and might therefore not correspond to the manual addition of these numbers.
- Use caution when interpreting the results due to small base sizes (n<30).
- When noted, calculated means exclude the largest outliers.





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REPORT

# KEY FINDINGS



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Respondents feel less safe in and around their properties in downtown Vancouver and there have been notable increases over the past year in safety-related incidents such as open drug use and social disorder. These incidents are prevalent during the weekdays in public spaces such as sidewalks and streets near their properties. However, businesses are making strides in enhancing safety and security. Increasing security personnel, implementing advanced security measures, and improving cleaning and repairs have been most effective at contributing to a safer environment. These efforts are reflected in the expected increase of monthly spending costs, specifically security and repair/maintenance costs, which demonstrate a commitment to maintain a secure workplace. As safety concerns create major barriers to return to office initiatives and impact staff well-being, these efforts pave the way for a more vibrant and productive downtown work environment.

## Top 5 Concerns with Downtown Vancouver

- 1 Drug/substance addiction issues
- 2 Crime and physical/verbal harassment
- 3 Open drug use
- 4 Vandalism and property damage
- 5 Houselessness

## Top 5 Most Effective Solutions (Rank 3)

- 1 Increased security personnel
- 2 Increased security measures
- 3 Increased cleaning and repairs
- 4 Card/code access to floors/bathrooms
- 5 Training on addiction and how to respond

79%

Note safety concerns are a barrier to encouraging employees to work downtown

27%

Are likely to close office in downtown Vancouver or move locations due to safety concerns

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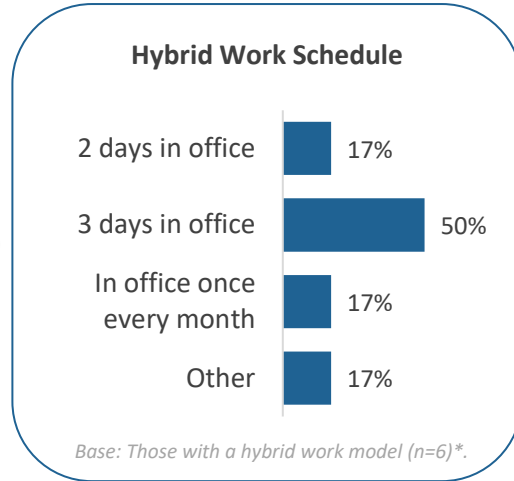
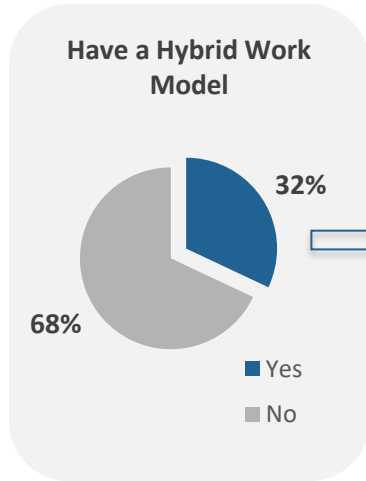
REPORT

# DETAILED RESULTS



# OFFICE ATTENDANCE

Most tenants do not have a hybrid work model. Among those that do, there is a strong preference for a three-day office schedule. The high visitor rate and guest numbers indicate an environment that is still highly interactive.



- 21** Employees in the office on average per day\*
- 84%** Receive visitors on a daily basis
- 615** Guests received at the office on average per week\*

Base: Business/Government Tenants located in Downtown or Just Outside Downtown Vancouver (n=19)\*.  
 Q5. Do you have a hybrid work model for working at the office/at home? Q6. What is your hybrid work schedule? Q7. On average, how many employees are in the office per day? Q8. On average how many guests do you receive at your office per week? Q9. Are you receiving visitors to your premises on a daily basis?

*\*Caution when interpreting results due to small sample size (n<30).*

*\* The largest outliers have been removed from the mean.*

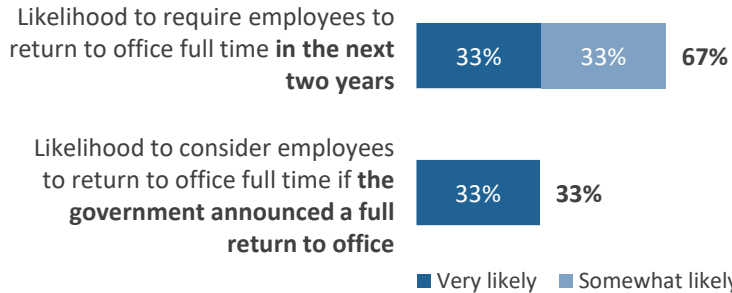


# RETURN TO OFFICE

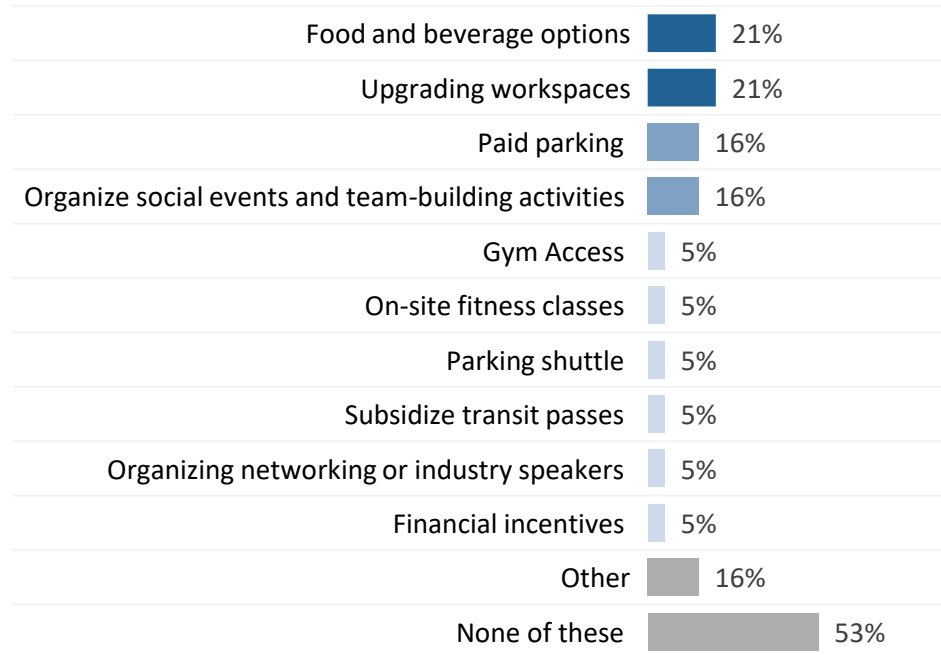
Returning to the office full-time is a possibility for some in the next two years, however many offices have not implemented significant changes to incentivize this return. This could indicate a reliance on other factors or a potential hesitancy to changing current work models.

## Likelihood to Return to Office

Base: Those with a hybrid work model (n=6)\*.



## Changes Made to Encourage Employees to Return to Office



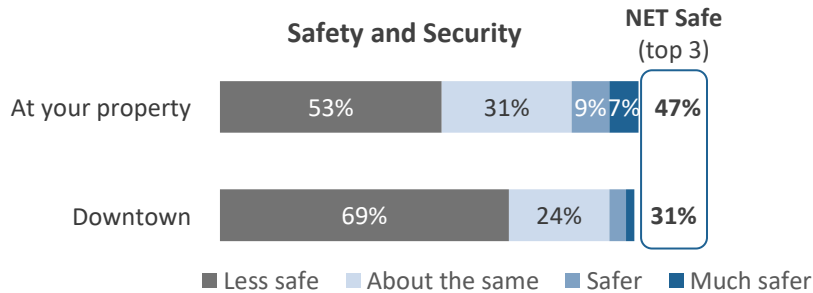
Base: Business/Government Tenants located in Downtown or Just Outside Downtown Vancouver (n=19)\*.

Q10. How likely is your organization to require employees to return to the office full time in the next two years (i.e. 5 days per week)? Q10x. If the government announced a full return to office for its employees, how likely would this make your organization to consider a full-time return to office for you and your employees? Q11. What changes have you made to encourage your employees to return to the office, if any?

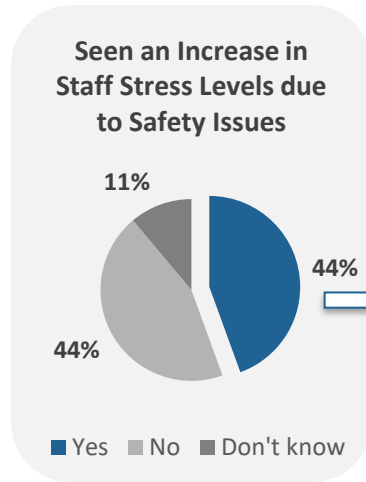
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# SAFETY & SECURITY ENVIRONMENT

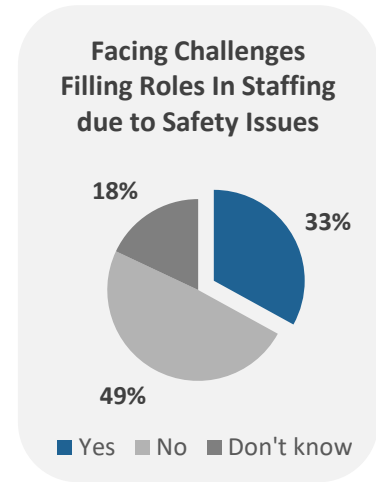
Safety is a growing concern in and around downtown Vancouver with over half considering their properties to be less safe compared to the previous year. The issue of safety and security has an impact on employee stress, staffing capabilities, and return to work strategies.



**79%** Indicate safety and security is a barrier (small/moderate/significant) to encouraging staff/employees to work or return to work in downtown Vancouver<sup>1</sup>  
*26% say it is a significant barrier*



**30%** Experienced a loss in manned hours due to an increase in stress levels<sup>2</sup>



Base: All respondents (n=45). <sup>1</sup>Base: Business/Government Tenants located in Downtown or Just Outside Downtown (n=19)\*.

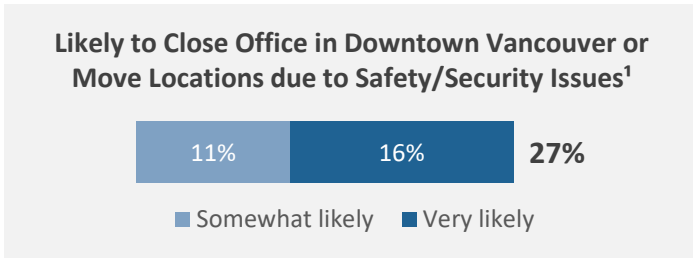
<sup>2</sup>Base: Those who have seen an increase in staff stress levels due to safety issues (n=20)\*.

Q12. Compared to last year, how would you consider the safety and security environment to be... Q13. To what extent is safety and security a barrier to encouraging staff/employees to work in downtown Vancouver or return to the office in downtown Vancouver? Q14. Have you seen an increase in stress leaves due to safety issues for your staff in the past year? Q15. How many manned hours did you lose due to an increase in stress leaves due to safety issues in the past year? Q16. Are you facing challenges filling roles in your staffing as a result of safety issues in this past year?

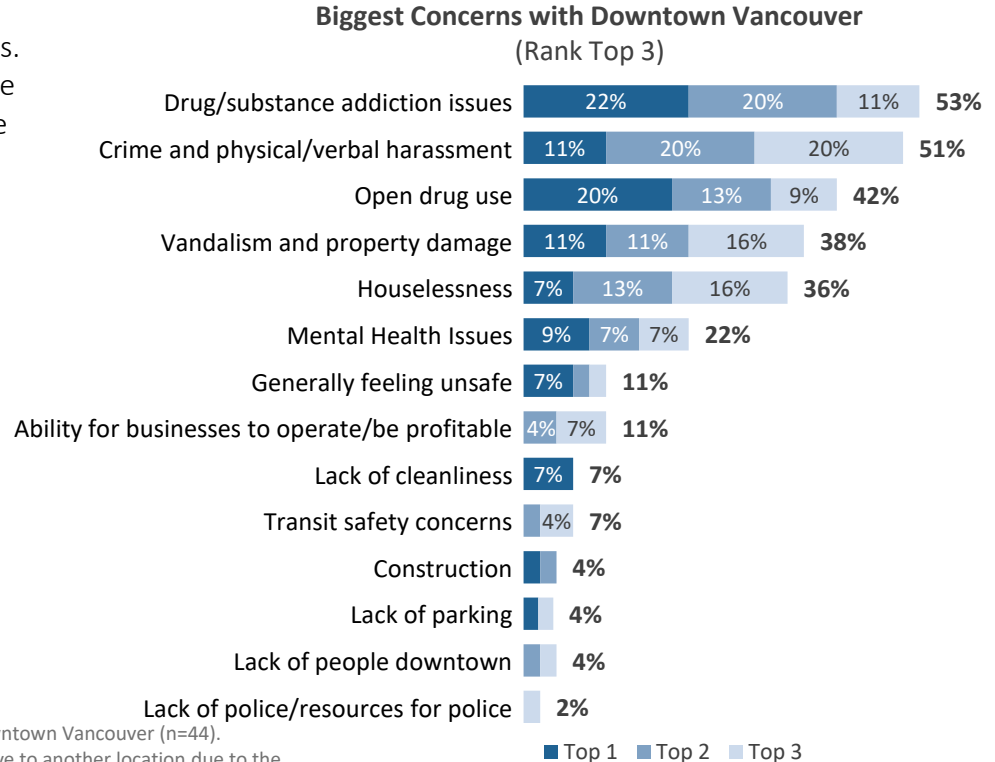
*\*Caution when interpreting results due to small sample size (n<30).*

# SAFETY CONCERNS IN DOWNTOWN VANCOUVER

Safety and security is a key issue, impacting business operations, employee wellbeing, and voting preferences. Over one quarter of offices are likely to close their office or move locations due to safety and security issues. The most prevalent issues are related to substance/drug abuse and crime.



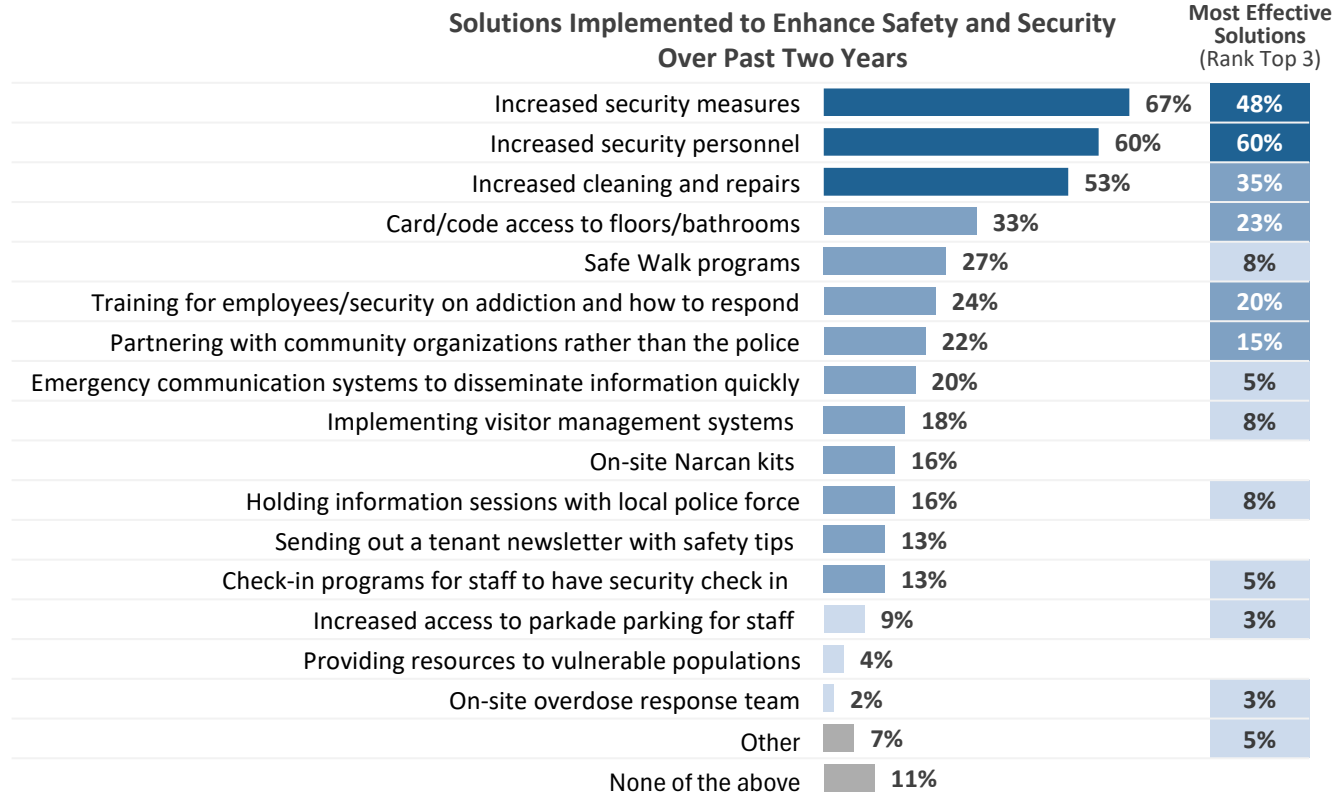
**67%** Indicate **safety will influence their voting preferences** at the upcoming provincial and federal elections



Base: All respondents (n=45). <sup>1</sup>Base: Respondents located in Downtown or Just Outside Downtown Vancouver (n=44).  
 Q17. How likely or not are you to close your office/business in downtown Vancouver or move to another location due to the safety and security issues in the next two years? Q18. What are you biggest concerns about downtown Vancouver? Q27a. Will safety influence your voting preference at the upcoming provincial and federal elections?  
 Responses less than 4% not labelled.

# ENHANCING SAFETY

Organizations have taken a multi-faceted approach to enhance safety and security in the past two years. The focus is heavily on increasing physical security measures and personnel, which are also viewed as the most effective solutions. Cleaning and repairs, access control, and specific training programs are also significant measures.



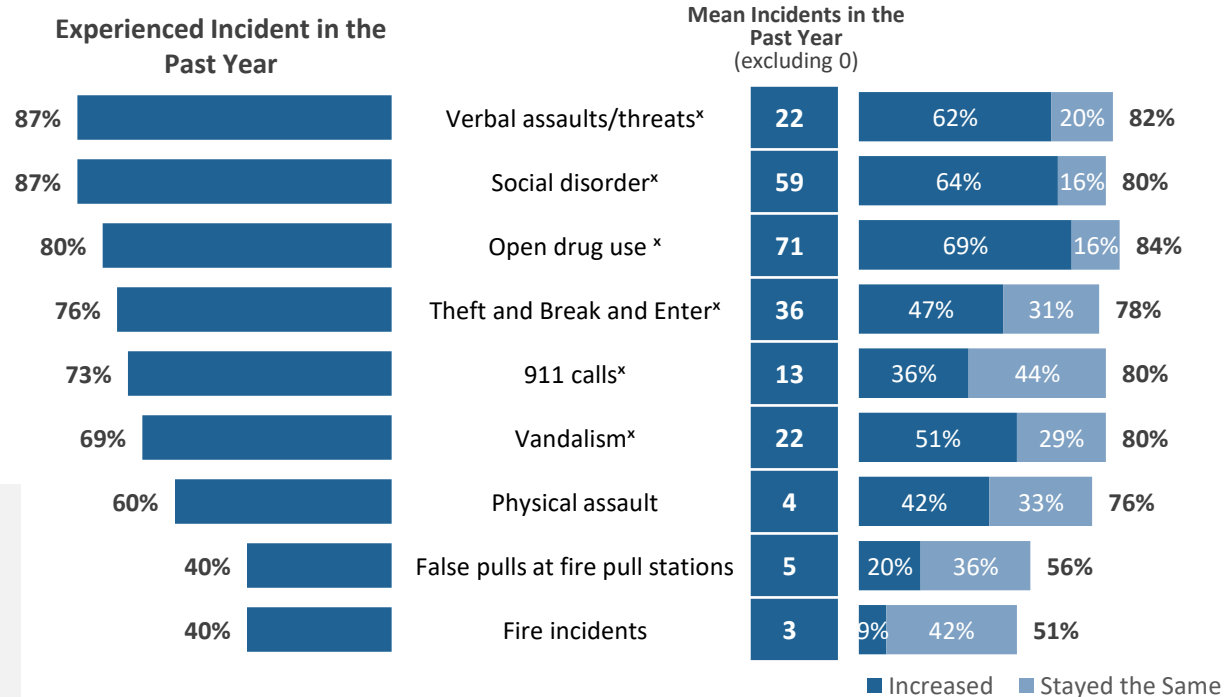
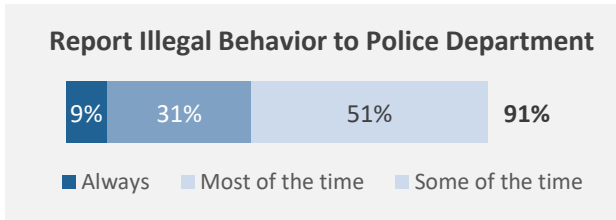
Base: All respondents (n=45).

Q19. What are some of the solutions you've implemented in the past two years to enhance safety and security at your property(ies)? Q20. In your opinion, which of the solutions that you have implemented have been most effective at enhancing safety and security at your property(ies)?



# SAFETY & SECURITY INCIDENTS

In the past year, incidents of social disorder such as dumpster diving, loitering, panhandling, etc., and open drug use had high rates of experience and were experienced more often. Further, these incidents have increased in the past year, indicating focus is needed in these areas to increase feelings of safety and security. Close to three-quarters have made at least one 911 call and most indicate they report illegal behaviours to their local police departments.



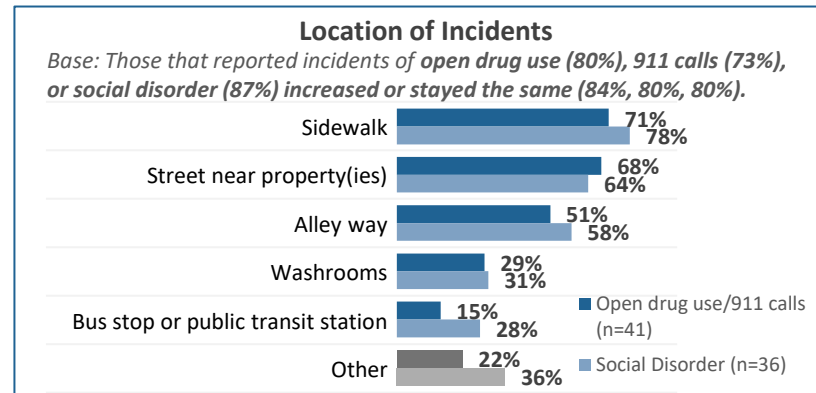
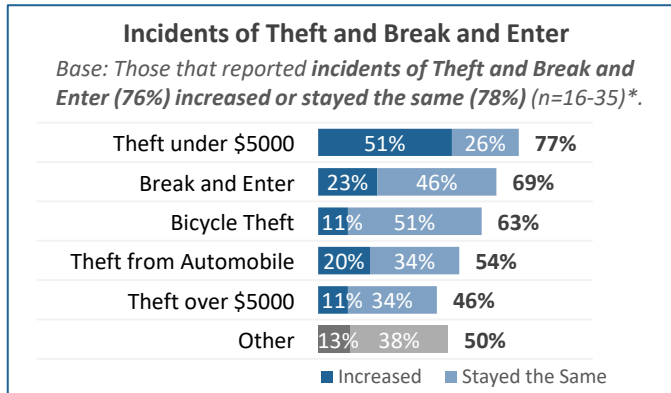
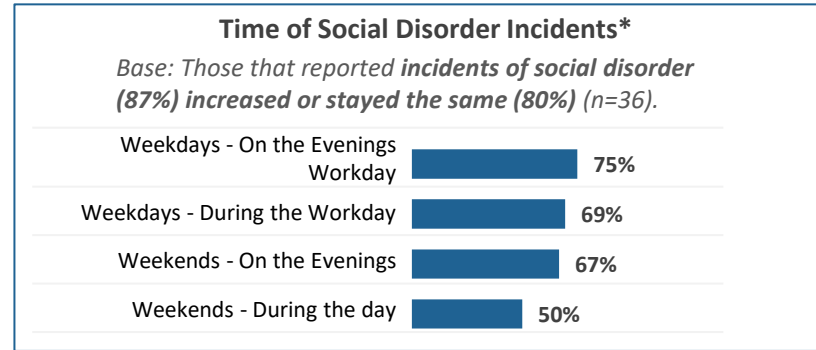
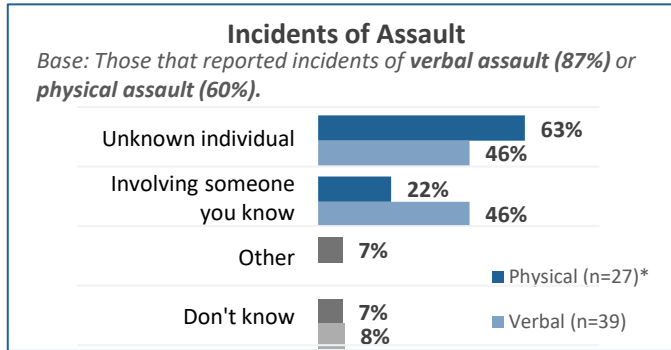
Base: All respondents (n=45).

Q22. In the past year, how many total incidents of the following have there been at your properties? Q23. Please indicate if the total number of incidents below has increased, stayed the same, or decreased on your property(ies) in the past year. Q23a. How often or not do you report illegal behavior to your local police department?

\* The largest outliers (reported incidents of 500+) have been removed from the mean.

# SAFETY & SECURITY INCIDENTS - CONTINUED

Experienced assaults typically involve unknown individuals. Issues of social disorder are particularly during weekdays, in public spaces like sidewalks and streets near properties. Among those that reported incidents of Theft and Break and Enter increased/stayed the same, theft under \$5000 and break-ins are common.



\*Caution when interpreting results due to small sample size (n<30).

Q22a. Please indicate if the incidents of physical/verbal assault are typically... Q24. Of your total number of incidents of Theft and Break and Enter, have the following types increased, stayed the same, or decreased in the past year? Q25. Where do these incidents around drugs or 911 calls typically occur? Q26. Where do these incidents around social disorder typically occur? Q27. When do these incidents around social disorder typically occur?

# COSTS IN THE COMING YEAR

There is a strong expectation of cost increases in the coming year, particularly in the 1-10% range. Monthly security costs and repair, cleaning, and maintenance costs are expected to see the highest increases.



Base: All respondents (n=45). <sup>1</sup>Base: Those who indicated each cost increased .  
 Q28. Do you think the following costs will increase, decrease, or stay the same in the coming year? Q29. In the coming year, how much do you expect the following costs to increase?  
 Responses 6% or less not labelled.

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REPORT

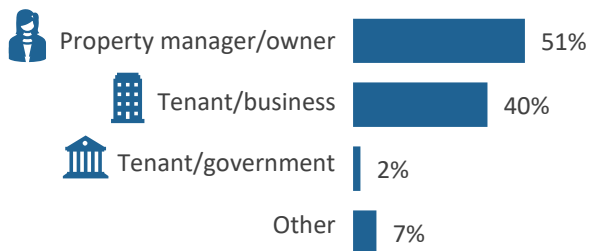
# RESPONDENT PROFILE



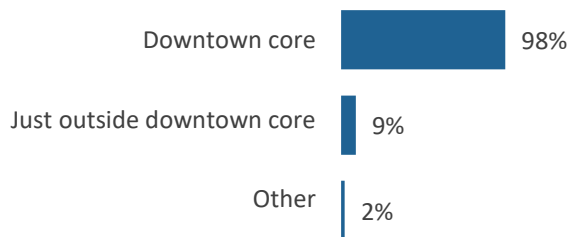


# RESPONDENT PROFILE

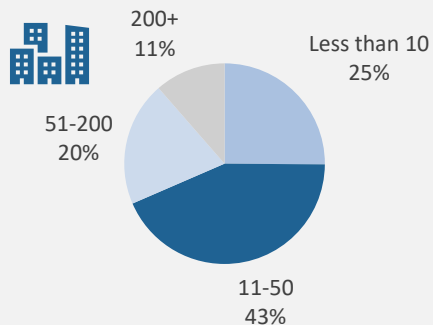
## Role



## Property Location



## Staff in Downtown Organization



Base: Those located in or just outside downtown Vancouver (n=44).

## Mean Total Square Footage<sup>1\*</sup>



672,283

## Mean Current Combined Occupancy<sup>1\*</sup>



78%

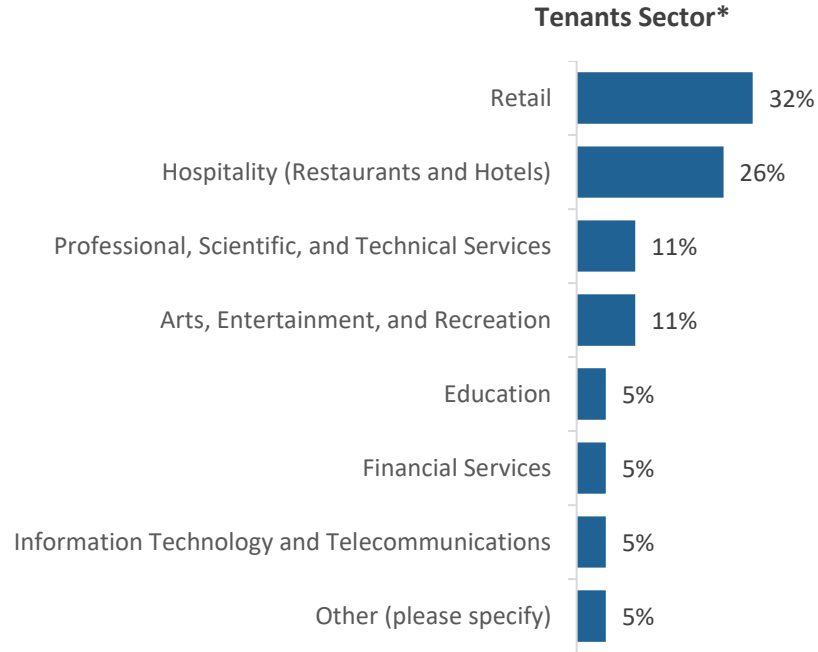
Base: All respondents (n=45). <sup>1</sup>Base: Property managers/owners located in or just outside downtown (n=22).

Q1. To start, please select your role. Q2. Where is your property(ies)/space(s) located?

Q3. How many staff does your organization employ in downtown Vancouver? Q4a. What is the total square footage of all properties you are reporting for? Q4b. What is the current combined occupancy (in%) for the properties you are reporting for?

*\*Caution when interpreting results due to small sample size (n<30).*

# RESPONDENT PROFILE



*\*Caution when interpreting results due to small sample size (n<30).*

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REPORT

# LEGER CREDENTIALS



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- **Leger**  
Marketing research and polling
- **Customer Experience (CX)**  
Strategic and operational customer experience consulting services
- **Leger Analytics (LEA)**  
Data modelling and analysis
- **Leger Opinion (LEO)**  
Panel management
- **Leger Communities**  
Online community management
- **Leger Digital**  
Digital strategy and user experience
- **International Research**  
Worldwide Independent Network (WIN)

**600**  
EMPLOYEES



**185**  
CONSULTANTS



**8**  
OFFICES

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Vancouver | CALGARY | VANCOUVER | NEW YORK



# Our Commitments to Quality

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Leger is a member of the [Canadian Research Insights Council \(CRIC\)](#), the industry association for the market/survey/insights research industry.



Leger is a member of [ESOMAR](#) (European Society for Opinion and Market Research), the global association of opinion polls and marketing research professionals. As such, Leger is committed to applying the [international ICC/ESOMAR](#) code of Market, Opinion and Social Research and Data Analytics.

Leger is also a member of the [Insights Association](#), the American Association of Marketing Research Analytics.



Leger is a sponsor of [CAIP Canada](#), Canada's professional body for Certified Analytics and Insights Professionals who uphold CRIC's marketing research and public opinion research standards. CAIP Canada is globally endorsed by ESOMAR and the MRII/University of Georgia.

A circular, blurred photograph of a busy city street with pedestrians and a bicycle. The image is in grayscale with a dark overlay. A red horizontal line is positioned above the main title, and another red horizontal line is positioned below the city list.

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