

Calgary



2024 Economic Perspectives Research

Final Report

December 2024

Prepared by:



ADVANIS

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Background and methodology

Background

Since 2017, The City of Calgary has conducted multiple waves of the Economic Perspectives Survey. This telephone survey provides an opportunity for The City to collect data from Calgarians on the topic of Calgary's economy, both current and future, to inform decision-making. Generally, four waves are conducted each year.

Methodology

The telephone survey was conducted by Advanis from November 20th to December 5th, 2024. A total of 501 Calgarians participated, completing the survey in an average of 15 minutes.

The survey was completed using numbers from both landlines (19%) and cell phones (81%) to obtain a random and statistically representative sample of Calgarians. The margin of error (MOE) for the total sample of n=501 is ± 4.3 percentage points, 19 times out of 20 (though larger among subgroups of the total).

To ensure the data was gathered from a representative group of Calgarians, sample quotas were set by age, gender, and city quadrant. Data were weighted based on the latest federal census for age, gender, and city quadrant. The weighting efficiency was 78%. Although the results are weighted, sample sizes for each question represent the number of actual respondents (i.e., unweighted n).

Throughout the report, ↓ denotes a significant decrease from the previous period and ↑ denotes a significant increase from the previous period, unless otherwise specified. Some charts and tables do not add to 100% due to rounding.

The Economic Perspectives Research has been conducted quarterly for many years. Throughout the report, the last six quarters are presented. However, all available quarterly tracking data is included in the appendices.

Highlights at a glance

QUALITY OF LIFE & ECONOMY



58%
(-6%pt)

Rate the **quality of life** in Calgary as “good”



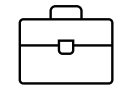
50%
(-2%pt)

Rate the **economy** in Calgary as “good”



69%
(0%pt)

Expect the economy in Calgary to be **stronger or about the same** in the next six months



60%
(+1%pt)

Expect Calgary’s **unemployment rate** to be worse six months from now

INFRASTRUCTURE INVESTMENT



75%
(-1%pt)

Think it is a good time for The City of Calgary to be **investing in new projects**

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



43%
(-7%pt)↓

Agree Calgary is **attracting enough investment** from outside of the province to help the economy



56%
(+4%pt)

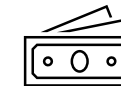
Are confident that The City of Calgary **will work together with local businesses** through this economic recovery

AWARENESS OF ECONOMY, TAXES, AND USER FEES



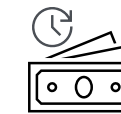
94%
(+0%pt)*

Believe the costs of basic necessities have increased over the past 12 months



73%
(-2%pt)*

Are concerned about the ability to **afford their basic necessities these days**



71%
(-3%pt)*

Are concerned about the ability to **afford their basic necessities six months from now**

↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave
* Semiannual, compared to last quarter with data

2024 key trends

Communications and messaging about what The City is doing to address affordability concerns, create jobs, and enhance economic diversity will boost Calgarians' confidence in the current state and future of Calgary's economy.



While the majority perceived quality of life and the current economic situation in Calgary as good, perceptions have declined in 2024. The majority do not expect unemployment (up compared to '23) and the economy in Calgary to improve in the next six months either.



62%
-8%pt ↓

Rate quality of life in Calgary as "good"



52%
-8%pt ↓

Describe the current economic situation in Calgary as "good"



57%
+7%pt ↑

Expect unemployment in Calgary to get worse in the next six months



80%

Expect Calgary's economic situation to be weaker or about the same in six months



Calgarians' ability to afford basic necessities, their confidence in the job market, and perceptions of the business environment are what matter most when it comes to Calgary's economic situation

Top 3 perceptions that impact ratings of Calgary's economic situation



26%
+1%pt

Are not concerned about their ability to afford basic necessities



39%
-7%pt ↓

Do not expect unemployment in Calgary to get worse in the next six months



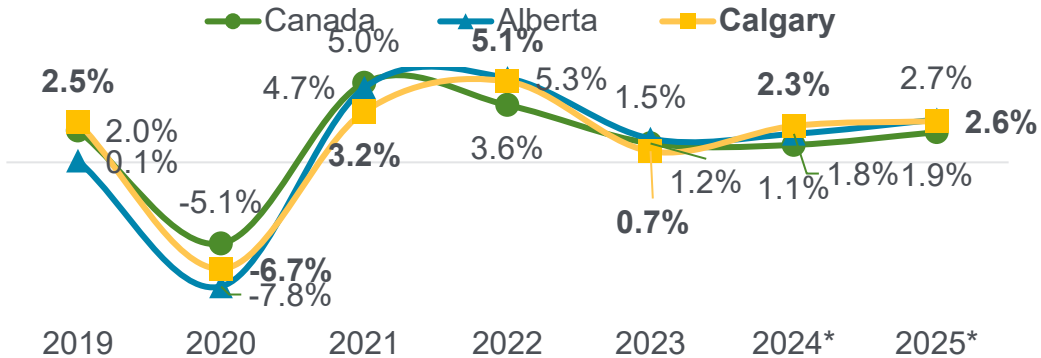
41%
-2%pt

Agree that now is a good time to start a new business in Calgary

Numbers shown reflect 2024 results, including difference compared to 2023, where relevant.

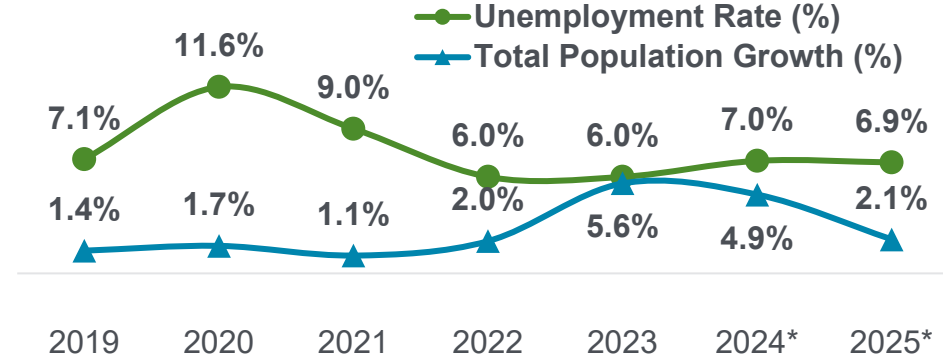
Survey context: Economic Indicators

REAL GROSS DOMESTIC PRODUCT GROWTH



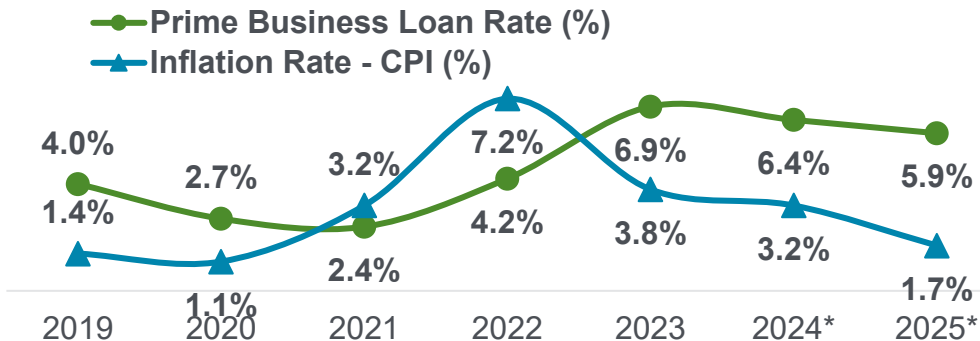
Real GDP in Calgary is forecasted to grow by 2.6% in 2025. A very mild increase compared to the 2024 forecast where GDP is forecasted to grow by 2.3%. This is in-line with expectations as one-half of Calgarians in Q4 expect the economy in Calgary to be about the same in six months.

CALGARY INDICATORS



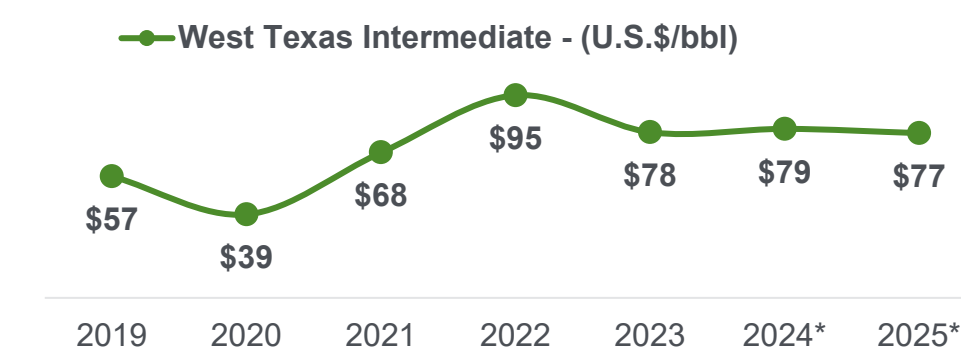
Despite population growth being forecasted to slow, the unemployment rate is forecasted to remain high but unchanged in 2025. However, three-fifths of Calgarians in Q4 expect unemployment to get worse in the next six months.

INFLATION AND INTEREST RATES



While the forecasted inflation rate is forecasted to decline sharply in 2025 and forecasted interest rates are also projected to decrease too, seven-in-ten Calgarians in Q4 are concerned with being able to afford necessities in the next six months.

PRICE OF OIL



Oil prices (WTI) in 2025 are forecasted to remain consistent with levels in 2023 and 2024. Meanwhile, over fourth-fifths of Calgarians in 2024 think it's crucial for Calgary to strike a better balance between oil and gas and other sectors within its local economy.

Survey context: December 2024

July 16: While ticket prices soared by 39% since 2019 (general inflation increased by 20% during the same period), the Calgary Stampede 2024 still cracked the attendance record.

July 24: Bank of Canada releases policy interest rate (target at 4.50%, down from 4.75% in June).

July 31: Real Gross Domestic Product in Canada grew 0.2% in May, following a 0.3% increase in April. The goods-producing industries grouping (+0.4%) was the main contributor.

September 3: The Province withdraws their funding of Phase 1 of the Green Line, citing concerns with the proposed tunnel under downtown and the reduced benefits and ridership of the shortened line.

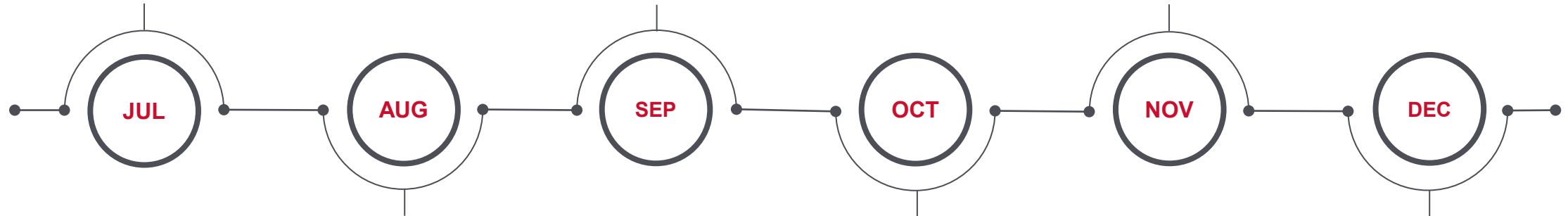
September 4: Bank of Canada releases policy interest rate (target at 4.25%, down from 4.50% in July).

September 6: In August 2024, Calgary's unemployment rate increased to 7.4%, reflecting a significant rise of 1.4%pts compared to August 2023.

September 17: In August 2024, the Consumer Price Index for the Calgary CMA rose by 2.3% year-over-year, a decrease from the 2.9% recorded in July. This indicates two consecutive months of slowing inflation in Calgary.

November 15: Canada Post begins strike. Calgary businesses face disruptions to their mail delivery process. The Canadian Federation of Independent Business found that 72% of small and medium enterprises declared they were negatively affected by the strike in a survey.

November 27: The Prairie Gateway Project, a joint venture between Rocky View County and The City, is approved by the Calgary Metropolitan Region Board. It aims to create over 6,750 jobs and generate \$1.6 billion in infrastructure investment.



August 9: Job growth in the Calgary Economic Region is mainly fueled by part-time positions in the services industry, with full-time employment down. From July 2023 to July 2024, the CER added 21,800 jobs, but full-time roles fell by 1,300, while part-time jobs rose by 23,000.

August 19: In the first half of 2024, Calgary ranked third in Canada for venture capital investment, securing \$346 million through 33 deals, surpassing Vancouver for the first time.

October 10: The City and the Province announce that an agreement had been reached to continue with some aspects of the Green Line LRT project.

October 23: The Bank of Canada cut its key interest rate from 4.25% to 3.75%, offering relief to Calgary businesses and homeowners by reducing borrowing costs. The Calgary Chamber of Commerce emphasized the potential for increased investment and hiring, though affordability challenges remain.

October 30: The OCIF Express program launched with \$5 million to help Calgary businesses hire and train talent in sectors like clean energy and digital tech. This funding is aimed at fostering economic growth in Calgary's fast-growing industries.

December 5: Eight members of the OPEC+ alliance decided to postpone production increases (to 2.2 million barrels per day over the course of 2025) that have been scheduled to take effect on January 1st. The increases are now expected to start on April 1st.

December 11: The Bank of Canada further cut its key interest rate from 3.75% to 3.25%. The target interest rate has now decreased by 1.75%pts (from 5%) since the Spring of 2024.

December 13: The Province announces its revised Green Line proposal, which includes an elevated track instead of a tunnel downtown and five more stations, saying it would save more than \$1 billion.

*** Economic Perspectives Surveys Field Dates:**

- 2024 Wave 2: July 10 to July 17
- 2024 Wave 3: September 18 to October 1
- 2024 Wave 4: November 20 to December 5

Key findings in 2024

Perceptions of overall quality of life in Calgary are significantly down in 2024

- Three-fifths (62%) of Calgarians currently rate their quality of life in Calgary as “good” (ratings of seven to ten on a ten-point scale), a significant decrease compared to 70% in 2023.
- Calgarians who are younger (57% vs. 63% for middle-adulthood and 65% for older); who live in the Northeast quadrant (53% vs 61% to 67% for other quarters); who identify as BIPOC (58% vs. 64% for non-BIPOC); or who have a lower household income (53% vs. 62% with middle income and 72% with high income) are less likely to rate their quality of life in Calgary as “good”.

Overall quality of life is closely tied to views about Calgary’s economic situation

- Calgarians' perceptions of their overall quality of life in Calgary is closely tied to their views about the City's current economic situation. The vast majority (79%) of those who perceive Calgary’s economic situation as somewhat or very good also rate their quality of life in the City as “good”. Conversely, less than one-half (43%) of Calgarians who perceive the City’s economic situation as “bad” perceive their quality of life in the City is “good”.

Positive ratings of the economic situation in Calgary are down in 2024 as well

- Positive perceptions of the economic situation in Calgary declined in 2024 (52%, down from 60%).
- Calgarians who identify as women (46% versus 57% for men); are younger (39% vs. 55% for middle-adulthood and 58% for older); or have a lower household income (45% vs. 52% for middle income and 58% for high income) are less likely to rate the economic situation in Calgary as “good” in 2024.

Key findings in 2024

To illustrate the differences in perceptions of the economic situation in Calgary, those most and least likely to consider the economic situation in Calgary to be good are:

Most likely



78%

Men / Aged 55+ / Non-BIPOC / \$120k+ HH income

Least likely



31%

Women / Aged under 35 / Non-BIPOC

77%

**Overall quality of life
in Calgary (% good)**

51%

Key findings in 2024

Perceptions of Calgary's economic situation are closely associated with views on affordability, employment, and the business environment

- Concerns about the affordability of basic necessities, expectations regarding the unemployment rate, and views on whether it is a good time to start a business in Calgary have the greatest impact on perceptions of Calgary's current economic situation and are areas where relatively fewer Calgarians express positive opinions.

Expectations for Calgary's economy to improve in the next six months are unchanged in 2024

- The proportion of Calgarians who expect the economy to be stronger six months from now has remained stable compared to last year (17% in 2024 vs. 18% in 2023).
- Calgarians who identify as BIPOC (22% vs. 15% for non-BIPOC) or who have a lower household income (21% vs. 17% for middle income and 15% for higher income) are more likely to expect the economy in Calgary to be stronger in the next six months.

Positive ratings of the economic situations at other levels of government are down in 2024 as well

- Positive perceptions of the economic situation in Alberta (52%, down from 60% in 2023) and Canada (39%, down from 46% in 2023 and from 50% in 2022) have declined in 2024.
- Younger Calgarians are less likely to rate Alberta (39%) and Canada (31%) as having "good" economic situations. Calgarians who identify as women (48% vs. 58% for men) or who have a lower household income (45% vs. 52% for middle income and 59% for higher income) are also less likely to rate the economic situation in Alberta as "good".

The expectation that the unemployment rate will get worse in Calgary has increased in 2024

- When asked about their expectations about the unemployment rate in Calgary in the next six months, more than one-half (57%, up from 50% in 2024) of Calgarians state that they believe the unemployment rate will get worse.

Key findings in 2024

Trust and confidence in The City of Calgary to help the city through this economic recovery are down in 2024

- Calgarians are less confident that The City will work together with local businesses and other levels of government to find the best solutions (53%, down from 64% in 2023); less trusting that The City will make the right decisions to help their city (47%, down from 59% in 2023); and less likely to agree that The City of Calgary municipal government is taking appropriate measures to support Calgary's economic recovery (46%, down from 55%).
- Calgarians are also less likely to either trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities (50%, down from 62% in 2023) and less likely to agree that The City of Calgary is making an effort to reduce the cost of local government (32%, down from 38% in 2023).
- Lastly, four-in-five (84%, on par with 86% in 2023) Calgarians still agree that it is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy.

Fewer Calgarians agree now is a good time for companies to be investing in Calgary compared to last year

- While seven-in-ten (72%) agree that now is a good time for companies to be investing in Calgary in 2024, this proportion is down compared to 2023 (76%). It is also the second year in a row that the proportion of Calgarians who feel this way decreased as eight-in-ten (81%) agreed that it was a good time for companies to be investing in Calgary in 2022. Just under one-half (48%) of Calgarians agree that Calgary as a city is attracting enough investment from outside of the province to help their economy in 2024 (which is similar to 2023).
- In 2024, two-fifths (41%) of Calgarians agree that now is a good time to start a business in Calgary (also similar to 2023).

Key findings in 2024

Perceptions that now is the right time for Calgary to invest in new infrastructure projects has remained unchanged

- Three-quarters (75%) of Calgarians think that now is a good time for the City to invest in new projects like roads, public transportation, and local facilities in 2024. This proportion is unchanged compared to last year.
- Men (78%) are more likely to say that now is a good time for the City to invest in new projects compared to women (73%).
- Projects that will create jobs (57% in 2024) and projects that will enhance economic diversity (49% in 2024) consistently remained the top two priorities related to infrastructure development in 2024 quarter after quarter. They were also the top two priorities in 2023.

Concerns about current and future affordability remain prevalent

- While almost all (94%) Calgarians have experienced increases in costs for basic necessities such as rent or mortgages, utilities, food and clothing over the past twelve months, fewer indicate that they feel these costs increased a lot (63% in November 2024, down from 74% in November 2023)
- Despite this decline, almost three-quarters (74%) of Calgarians continue to report that they are concerned about their ability to afford their basic necessities and a similar number (72%) are concerned about their ability to afford basic necessities in the near future.
- Calgarians who are women (77% vs. 70% for men); who are younger (80% vs. 75% for middle-adulthood and 69% for older); or who are BIPOC (83% vs. 71% or non-BIPOC) are more likely to be concerned about their ability to afford their basic necessities. Conversely (and unsurprisingly), Calgarians who have a higher income household (55% vs. 82% for middle income and 84% for lower income) are less likely to be concerned about their ability to afford their basic necessities.

Key findings in 2024

Calgarians have improved awareness of the provincial property tax

- A larger proportion of Calgarians are aware that The City of Calgary collects provincial property taxes on behalf of the provincial government this year (58%) than last year (51%). This is also true with regards to Calgarians being aware that approximately 35% of taxes The City collects is transferred to the province (41% vs. 35% in 2023).

Regarding the economy, Calgarians are most likely to read, see, or hear about housing (rents, mortgages, etc.)

- Three-quarters (76%) of Calgarians report that they have read, seen or heard anything about Calgary's economy / economic conditions.
- The most common topics Calgarians have come across are the housing market (rents, mortgages, real estate, etc.) at 21%; inflation and cost of living at 15%, and the job market (unemployment rates, layoffs, etc.) at 12%.

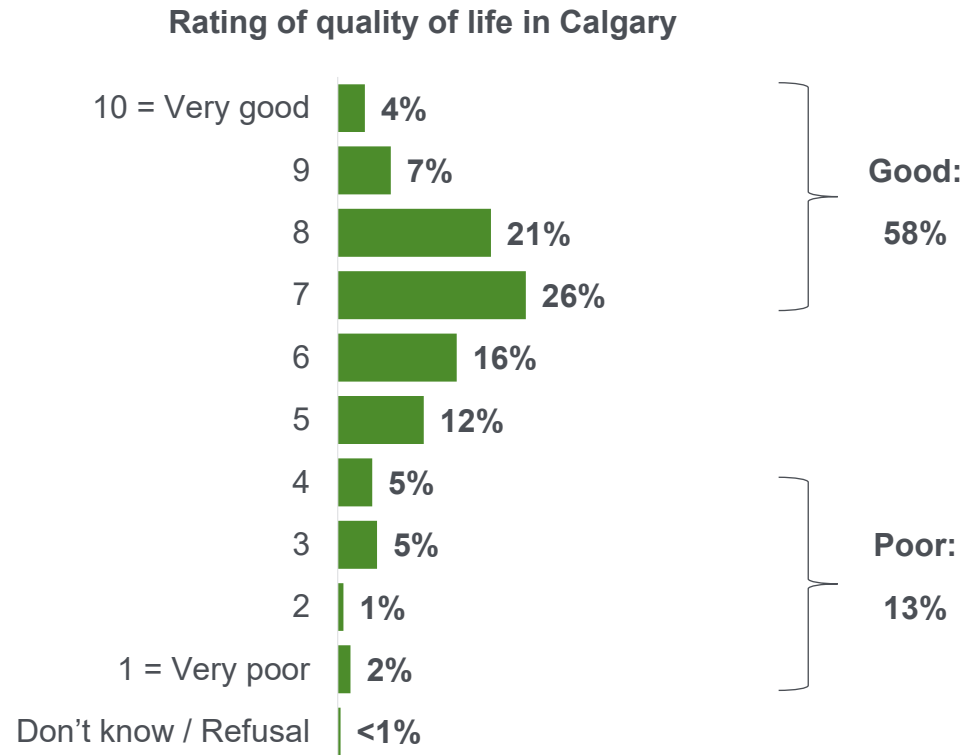


Detailed findings

Quality of life

Overall quality of life in Calgary

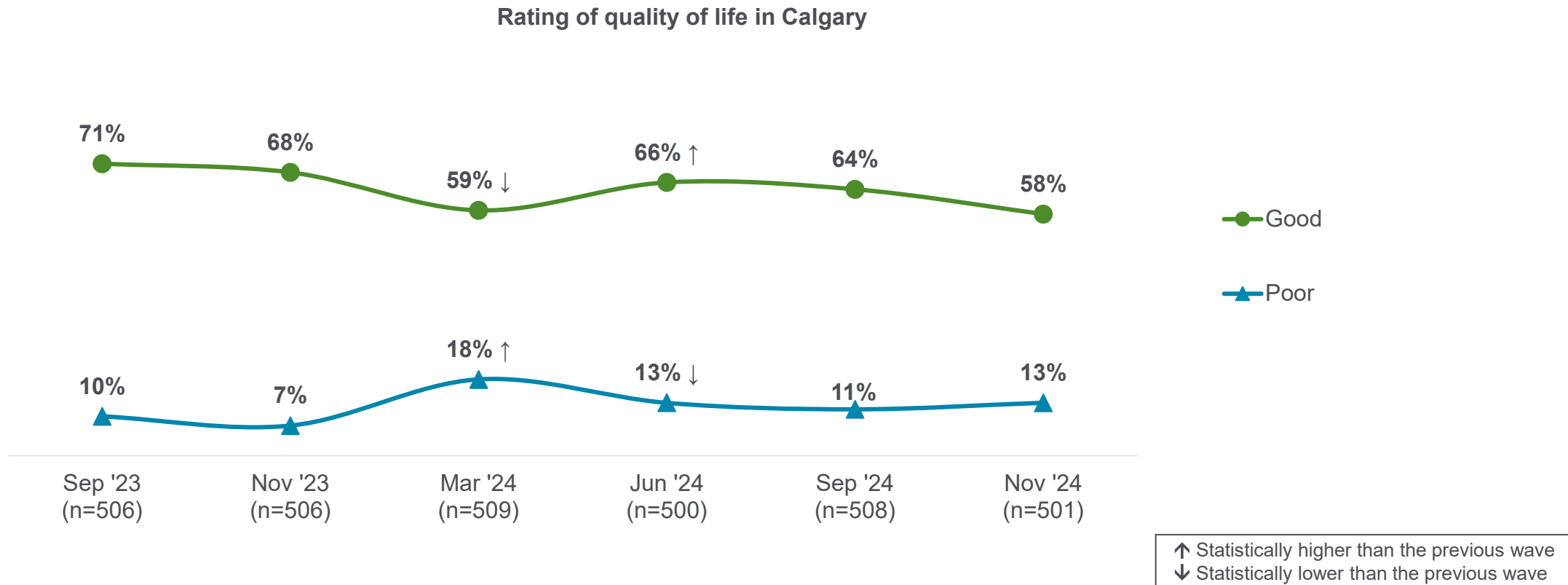
Close to three-fifths (58%) of Calgarians rate their quality of life in Calgary as “good” while just a small proportion (13%) rate it as “poor”.



Q2. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in Calgary today?
Base: all respondents (n=501)

Tracking overall quality of life in Calgary

Positive quality of life ratings experienced a nominal, but not statistically significant, decline from 64% in September 2024 to 58% this quarter, returning to the level observed in the first quarter of 2024.



Q2. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in Calgary today?

Base: all respondents



Detailed findings

The economy and economic recovery



Current economic situation

About one-half of Calgarians perceive the economic situation in Calgary and Alberta as “good” (50% and 53%, respectively). In contrast, over one-half (58%) have a negative perception of the economic situation in Canada.



Q6. How would you describe the current economic situation in...?
Base: all respondents (n=501)

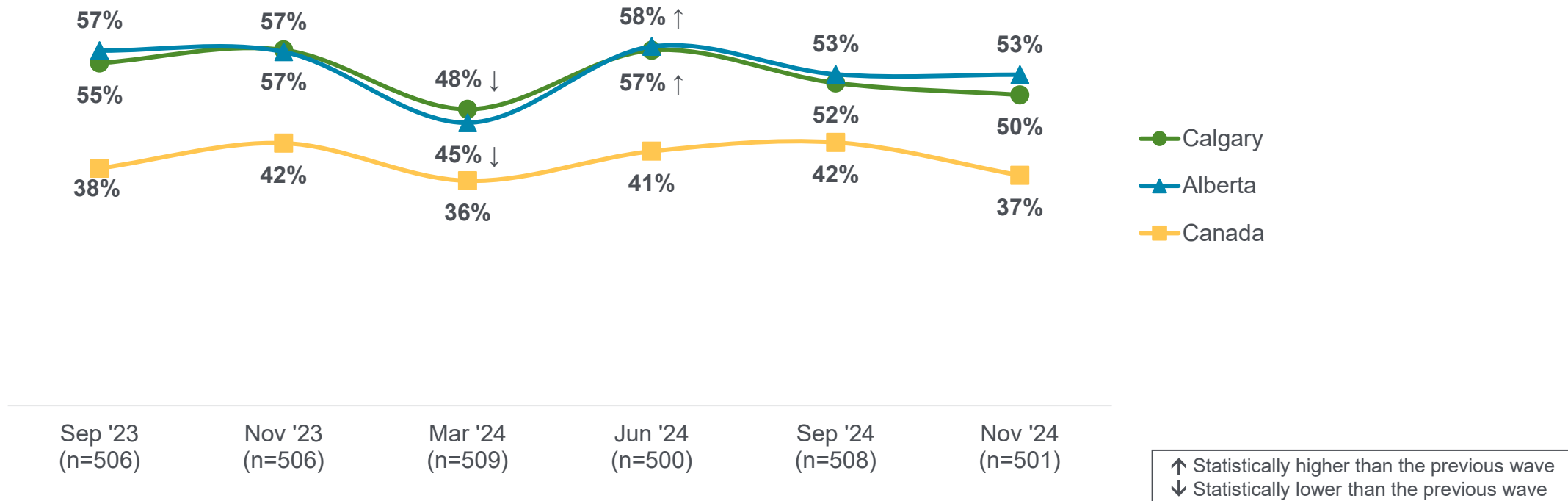
Data labels <4% not shown

* Rounding

Tracking current economic situation

Positive ratings of the current economic situation in Calgary and Alberta remain unchanged from last quarter. Those rating the economic situation in Canada as “good” (37%) slightly decreased compared to last quarter (42%), albeit not significantly.

Rating current economic situation ('Good' ratings)

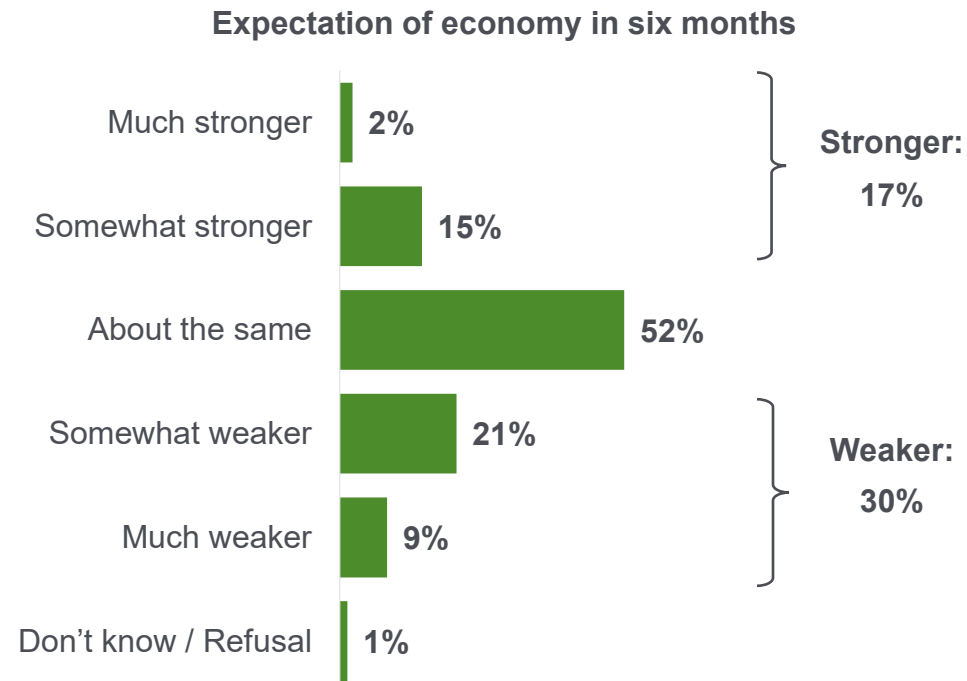


Q6. How would you describe the current economic situation in...?

Base: all respondents

Future of the economy in Calgary

About one-half (52%) of Calgarians believe the economy will remain the same in six months, just under one-third (30%) anticipate it will weaken, and less than one-fifth (17%) expect it to be stronger.

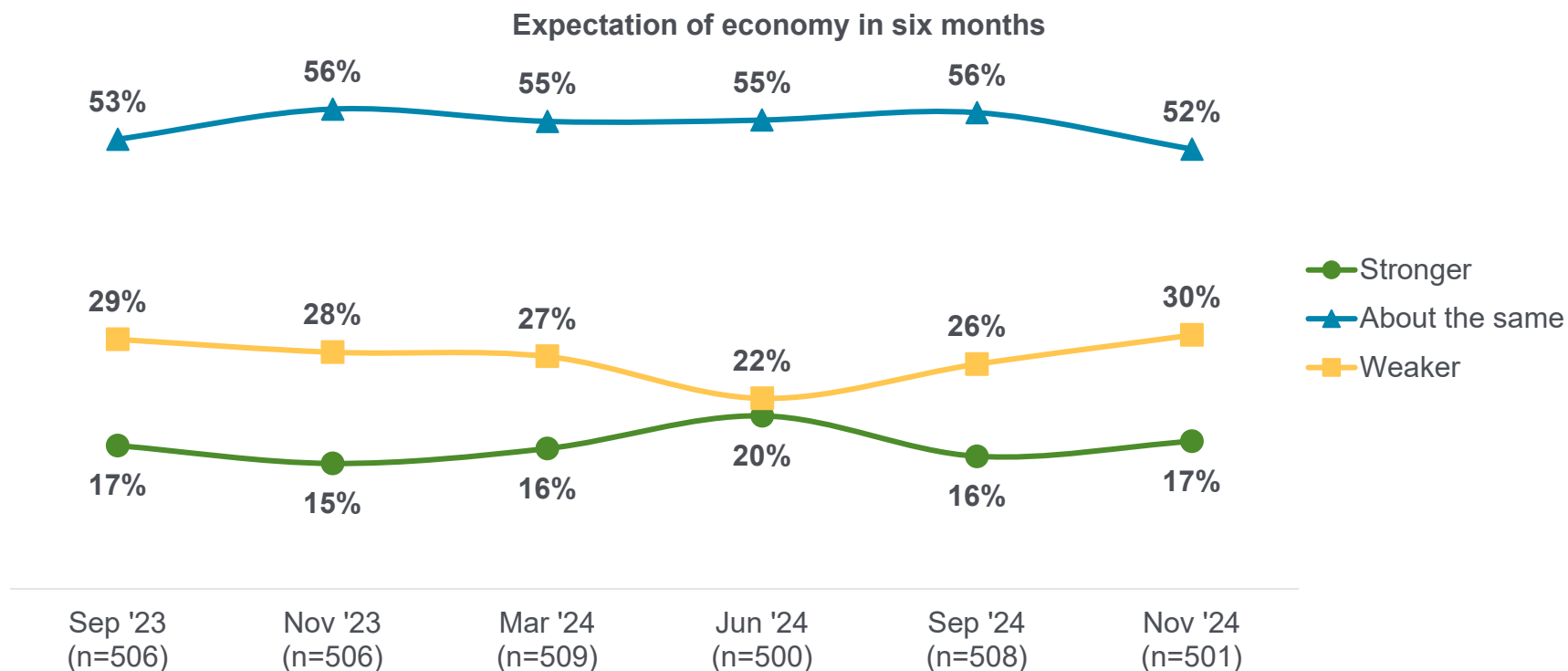


Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Base: all respondents (n=501)

Tracking future of the economy in Calgary

Expectations for Calgary's economy to strengthen or remain the same six months from now have remained stable since last quarter. Expectations for the economy to be weaker have been trending upward since June 2024.



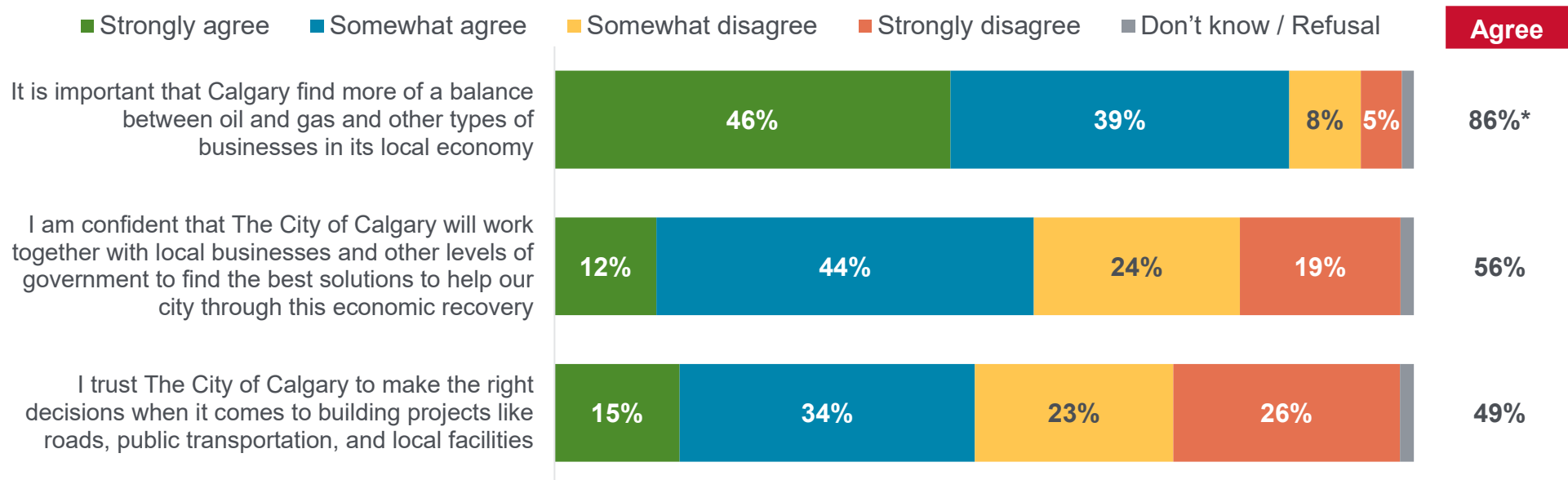
Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Base: all respondents

Perceptions of The City's role in the economic recovery and investments

A large majority (86%) of Calgarians agree on the importance of Calgary achieving a better balance between its reliance on oil and gas and other types of businesses in its local economy. Just over one-half (56%) express confidence that The City will collaborate effectively with local businesses and other levels of government to find optimal solutions for navigating through the economic recovery, while about one-half (49%) trust The City to make the right decisions when it comes to building infrastructure projects.

Agreement with perceptions of The City's role in economic recovery



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

Base: all respondents (n=501)

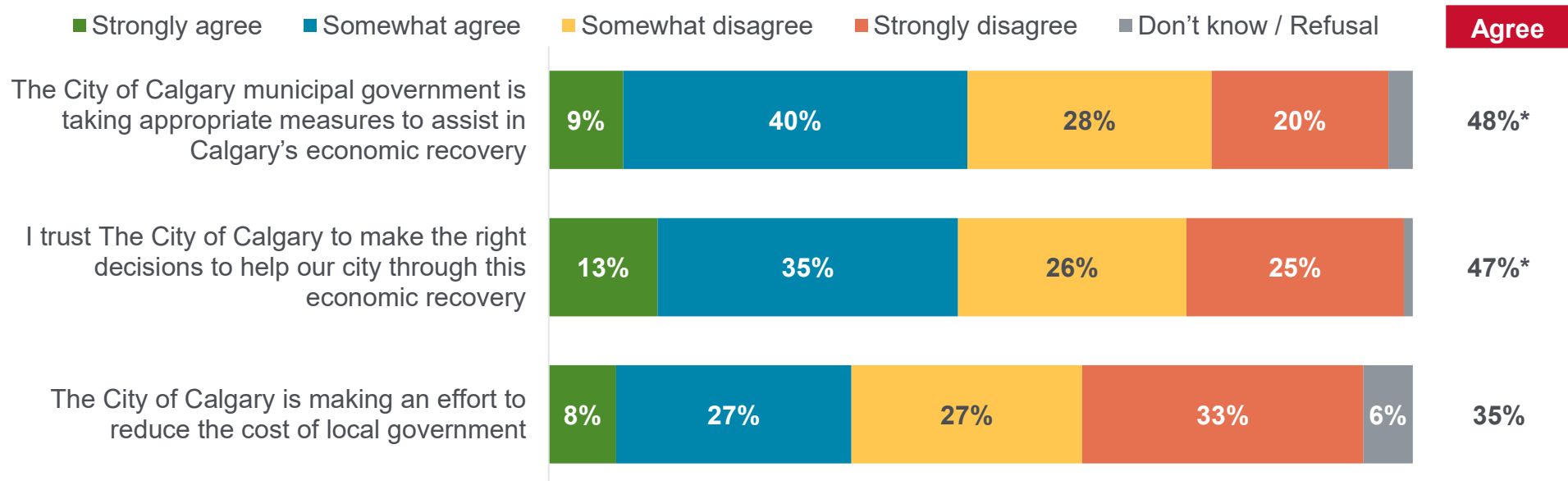
Data labels <4% not shown

* Rounding

Perceptions of The City's role in the economic recovery and investments (continued)

Just under one-half of Calgarians (48%) believe the municipal government is actively implementing appropriate measures to support Calgary's economic recovery, a similar number (47%) trust The City to make the right decisions to help our city through this economic recovery. About one-third (35%) feel that The City is making an effort to reduce the cost of local government.

Agreement with perceptions of The City's role in economic recovery



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

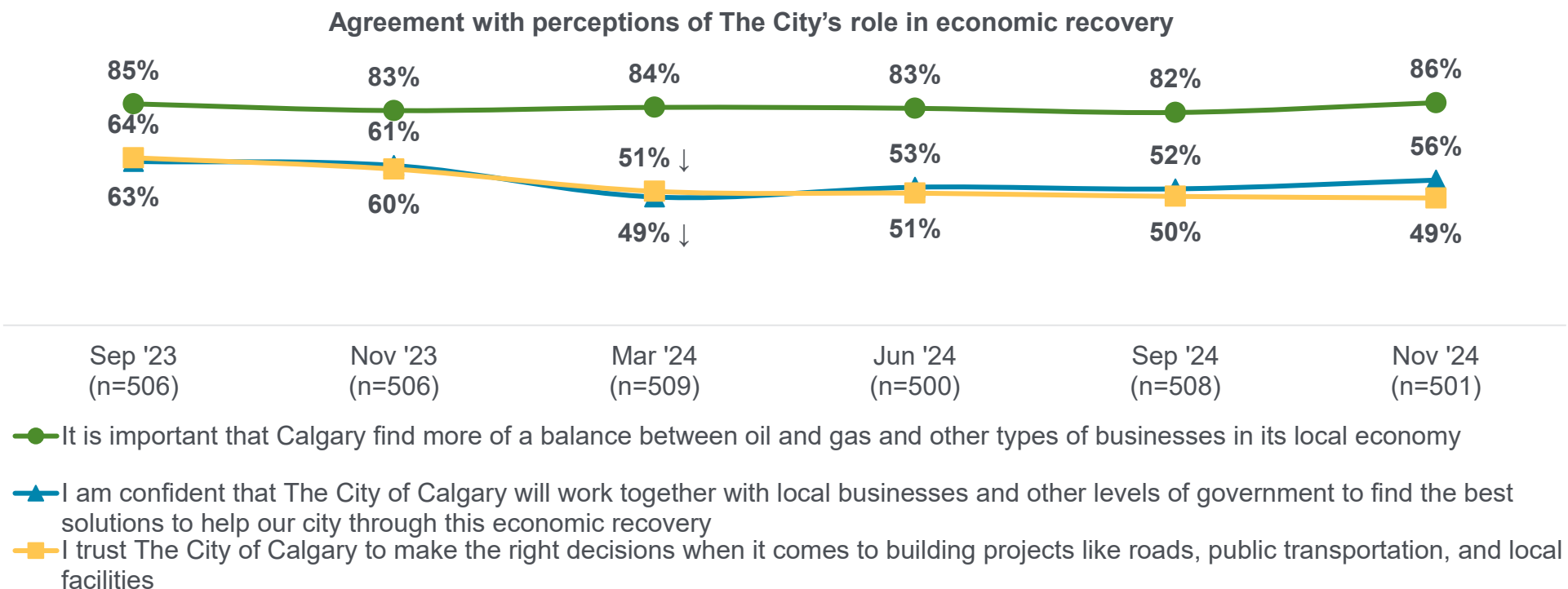
Base: all respondents (n=501)

Data labels <4% not shown

* Rounding

Tracking perceptions of The City's role in the economic recovery and investments

Calgarians' views on The City's role in economic recovery have remained consistent since last quarter. Achieving a better balance between the oil and gas sector and other businesses in the local economy continues to be a priority for most (86%) Calgarians.



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

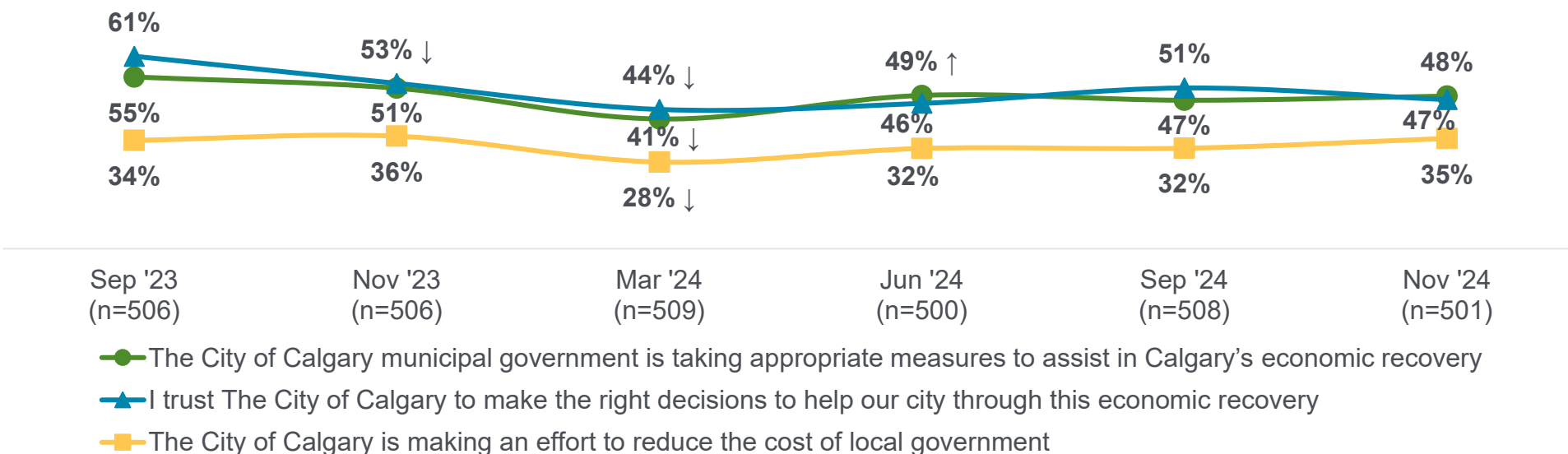
Base: all respondents

↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave

Tracking perceptions of The City's role in the economic recovery and investments (continued)

Perceptions about The City taking appropriate measures to support the economic recovery, trust in The City's ability to make the right decisions towards economic recovery, and perceptions about the City making an effort to reduce the cost of local government have remained stable since September 2024.

Agreement with perceptions of The City's role in economic recovery



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

Base: all respondents

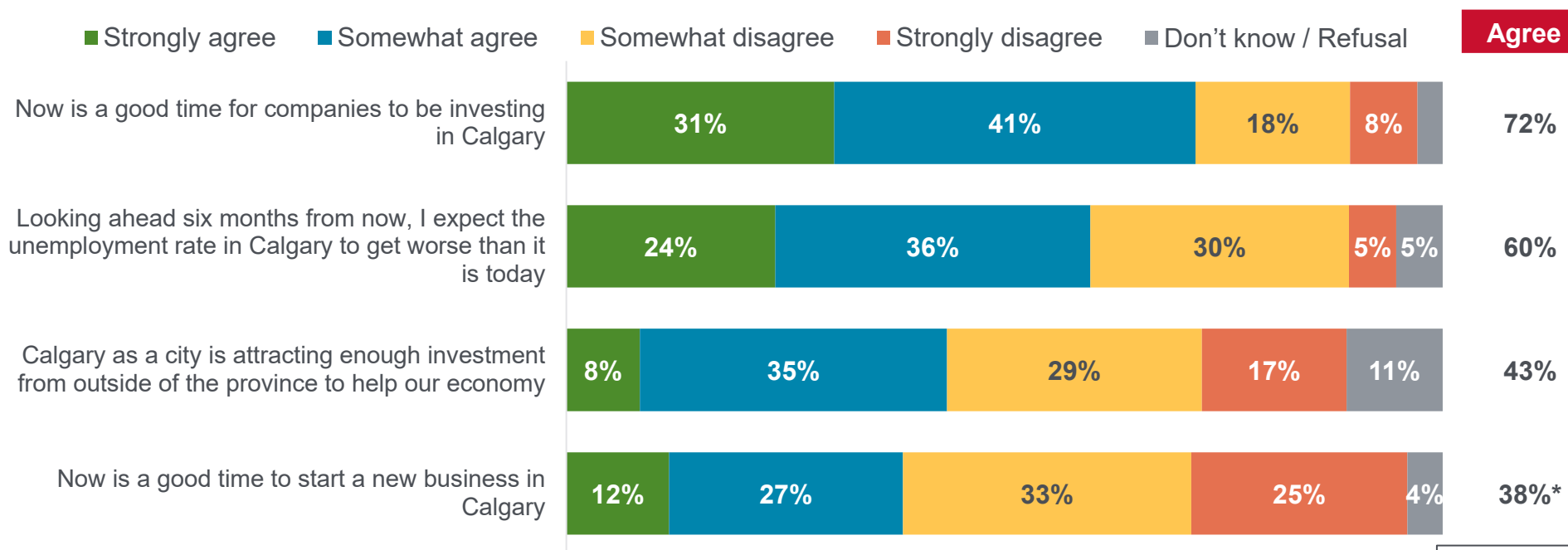
↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave

Perceptions of Calgary's economic recovery and investments

A majority of Calgarians (72%) think it's a good time for companies to invest in Calgary, but just over one-third (38%) perceive now is a good time to start a new business in The City.

Three-fifths (60%) expect the unemployment rate in Calgary to worsen over the next six months, and under one-half (43%) believe that Calgary is attracting sufficient out-of-province investment to support the economy.

Agreement with perceptions of Calgary's economic recovery



Data labels <4% not shown

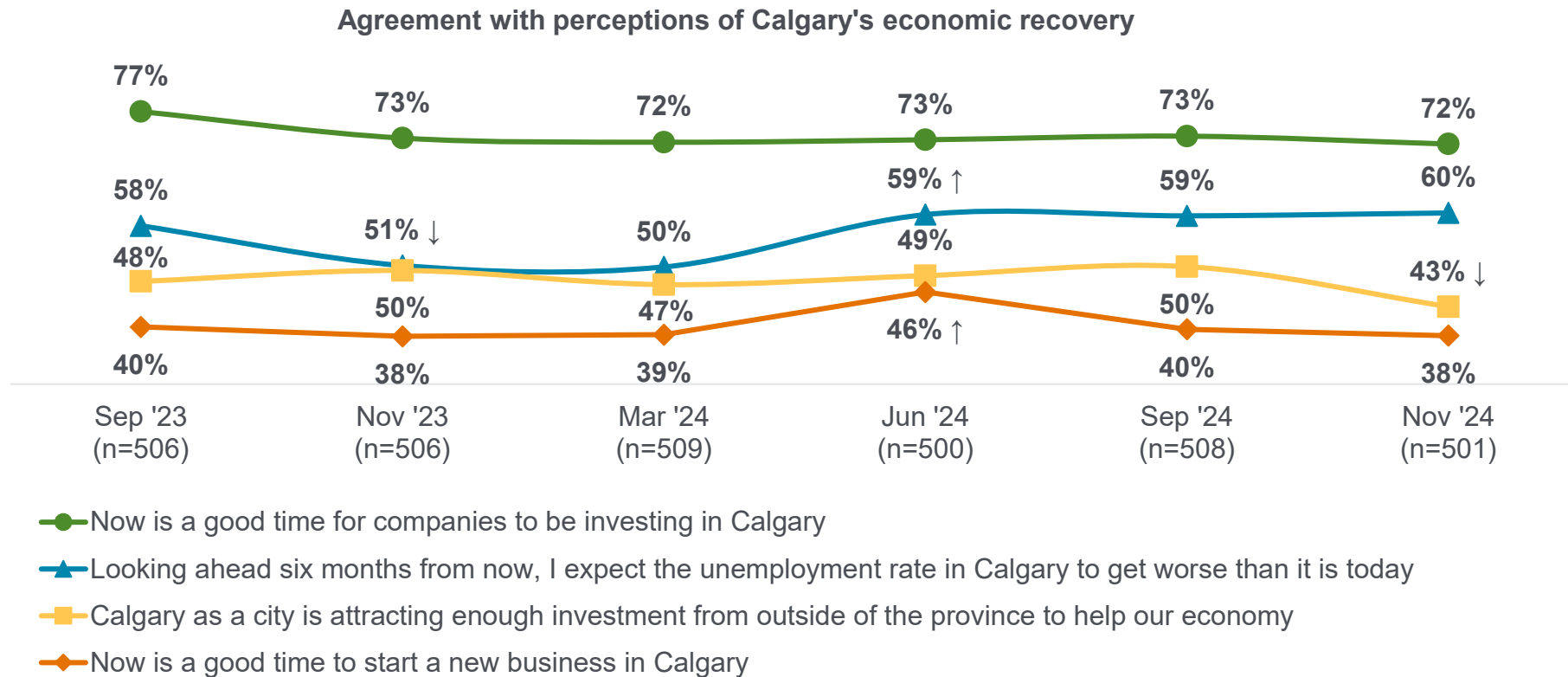
* Rounding

Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?

Base: all respondents (n=501)

Tracking perceptions of Calgary's economic recovery and investments

The proportion of Calgarians who perceive that The City is attracting sufficient investment from outside the province has decreased from 50% in September to 43% this quarter. Perceptions about now being a good time to start a new business or to be investing in Calgary remain unchanged. Expectations about the unemployment rate deteriorating have remained stable since an increase in June 2024.



Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?

Base: all respondents

↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave

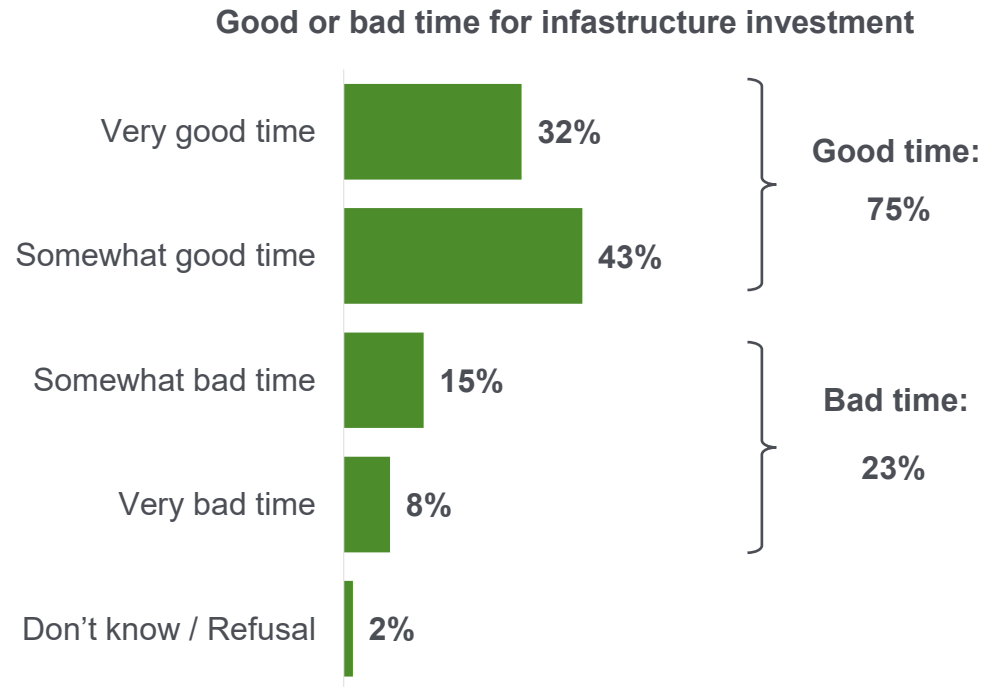


Detailed findings

Infrastructure investment

Infrastructure investment

Three-quarters (75%) of Calgarians believe now is a good time for The City to invest in new projects like roads, public transportation, and local facilities.

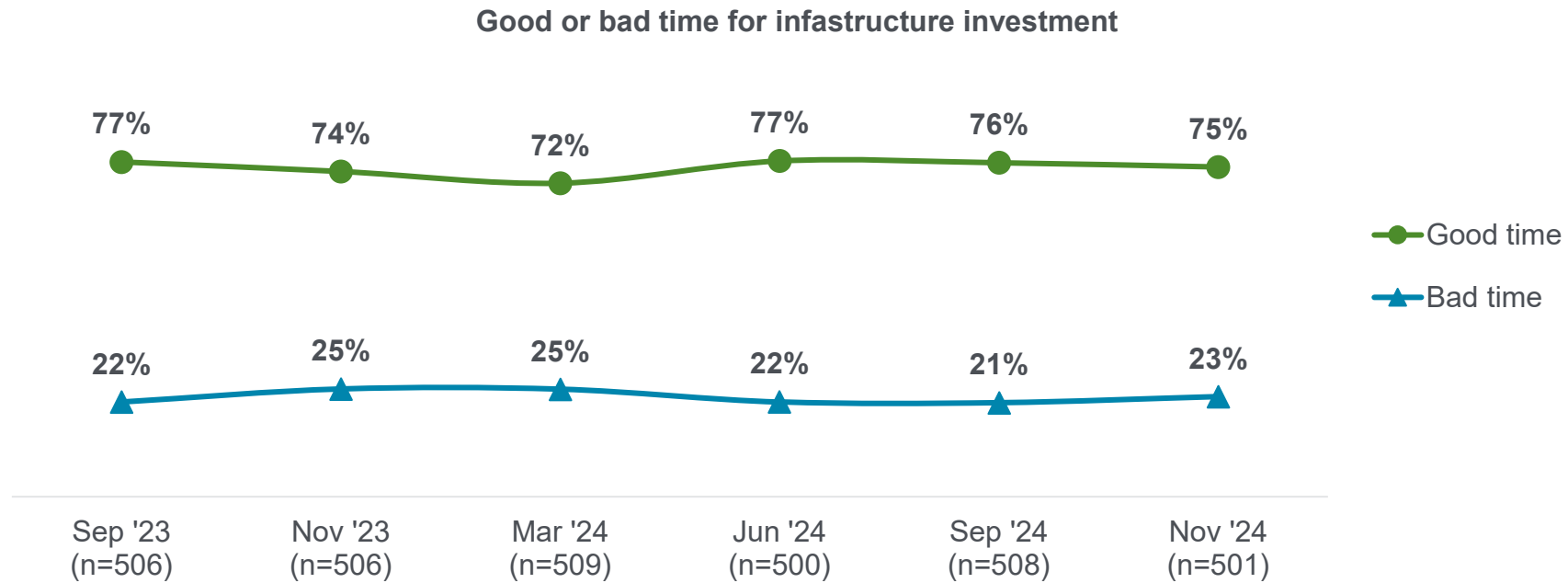


II1. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?

Base: all respondents (n=501)

Tracking infrastructure investment

The proportion of Calgarians who believe it is a good time for The City to invest in infrastructure has remained stable since June 2024.



II1. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?

Base: all respondents

Importance of different infrastructure investments

To measure the perceived importance of different infrastructure investments, a Best Object Scaling (BOS) approach was used:

- Survey respondents were shown various types of projects and asked to select the one they felt is most important. This process was repeated several times using different project combinations, and each time the respondent was forced to make a discriminating choice amongst them (see images below).
- Results were then aggregated across all respondents. The explicit trade-offs made by participants are used to reveal a statistically valid scale we can then use to measure relative project preference.

II2BOS1 - We would like to get your input on the level of importance you would place on different types of infrastructure projects. For each of the next few questions, I will list two types of projects and will ask you to let me know which, if any, type of projects you think is most important.

To start, which of the following types of projects do you think is most important?

- ☐ 1__ Projects that will be used for multiple purposes, for example both recreation and arts
- ☐ 2__ Or Projects that will have a positive social impact
- ☐ 3__ Or neither of these?
- ☐ 4__ [DO NOT READ] Don't know
- ☐ 5__ [DO NOT READ] Prefer not to answer

II2BOS2 - And which, if any, of the following types of projects do you think is most important?

- ☐ 1__ Projects that will create jobs
- ☐ 2__ Or Projects that will enhance economic diversity
- ☐ 3__ Or neither of these?
- ☐ 4__ [DO NOT READ] Don't know
- ☐ 5__ [DO NOT READ] Prefer not to answer

II2BOS3 - The next two are:

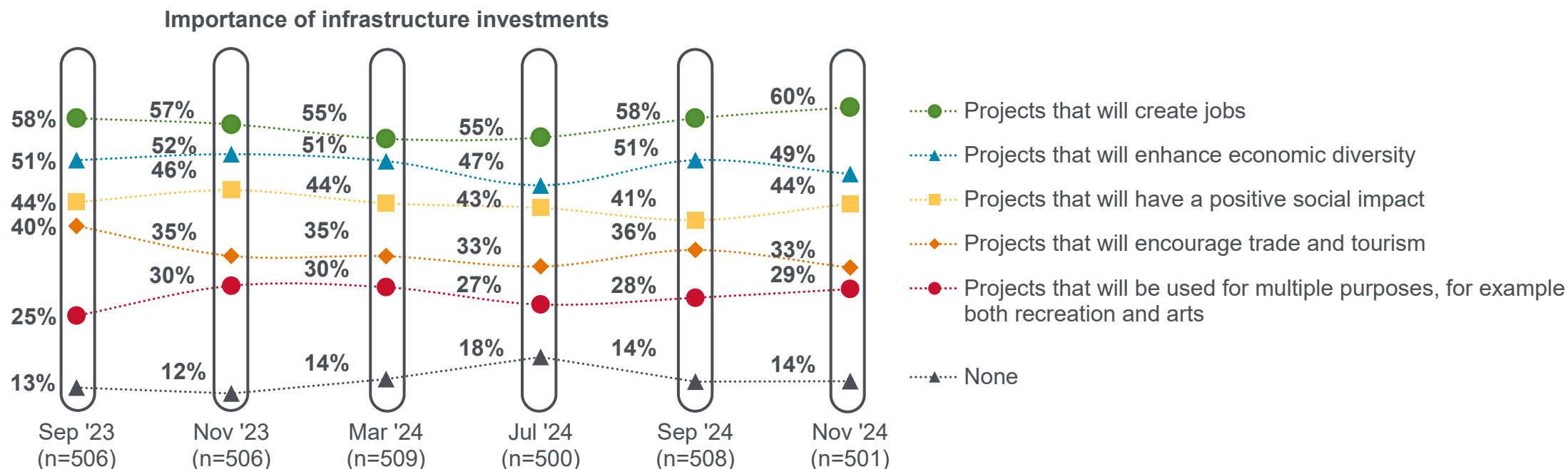
ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- ☐ 1__ Projects that will enhance economic diversity
- ☐ 2__ Or Projects that will encourage trade and tourism
- ☐ 3__ Or neither of these?
- ☐ 4__ [DO NOT READ] Don't know
- ☐ 5__ [DO NOT READ] Prefer not to answer

Importance of different infrastructure investments

Projects that create jobs continue to be seen as the most important (60%), with the gap between these and projects aimed at enhancing economic diversity (49%) widening this quarter to 11%.

The gap between projects with a positive social impact (44%) and projects that will encourage trade and tourism (33%) has widened by a similar number of percentage points.



I12BOS. We would like to get your input on the level of importance you would place on different types of infrastructure projects. For each of the next few questions, I will list two types of projects and will ask you to let me know which type of projects you think is most important. Which of the following types of projects do you think is most important?

Base: all respondents

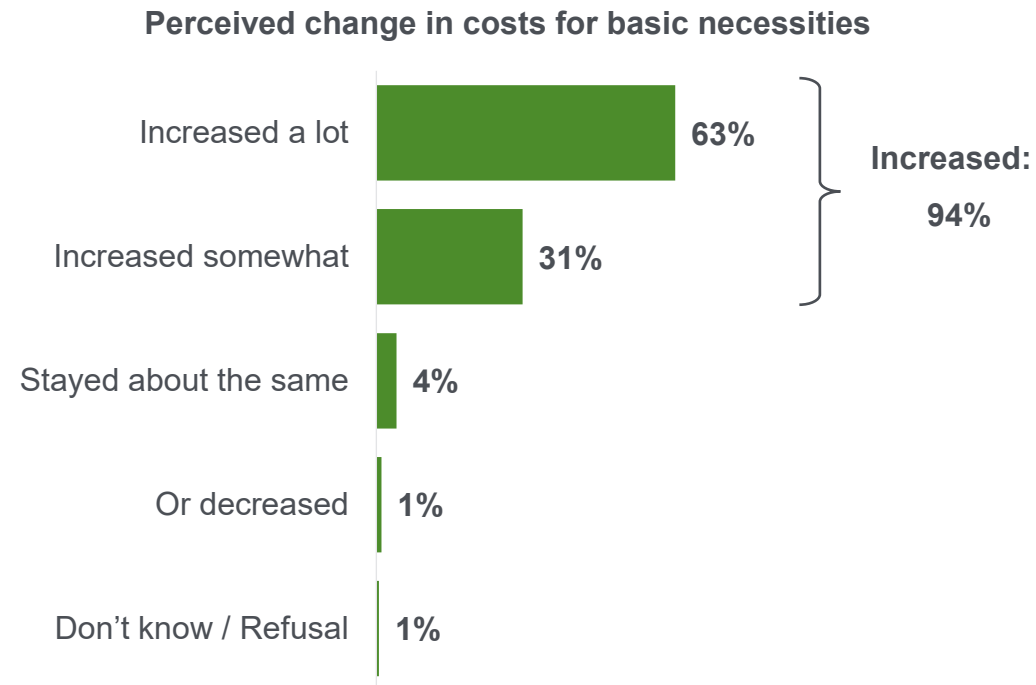


Detailed findings

Affordability of basic necessities

Perceptions of cost of living

Almost all (94%) Calgarians have experienced a rise in the costs of basic necessities over the past 12 months, with just under two-thirds (63%) feeling that these costs have increased significantly.

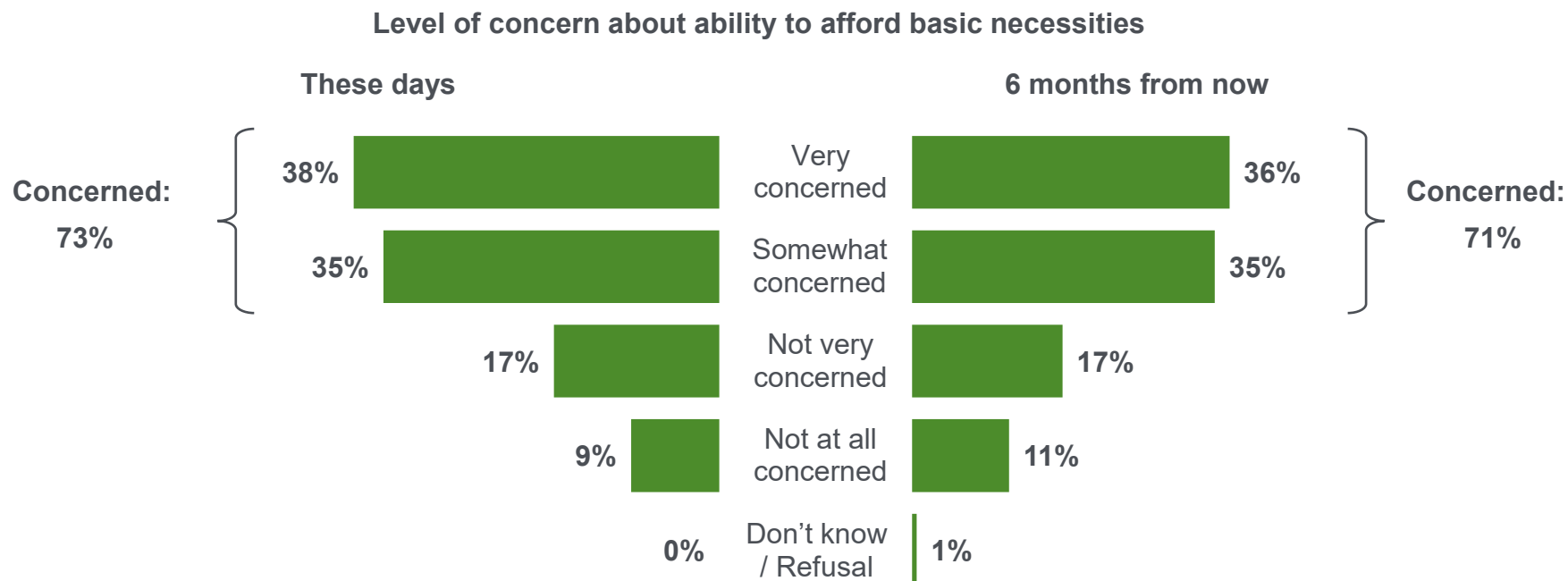


CL1. Over the past 12 months, have the costs for your basic necessities, such as your rent or mortgage, utilities, food, and clothing ...
Base: all respondents (n=501)

Concern about current and future cost of living

Just under three-quarters (73%) of Calgarians are concerned about their current ability to afford basic necessities and a similar number (71%) are concerned about their ability to afford basic necessities in the near future.

- The groups most likely to be concerned about affordability currently are those who are under 35 (81%); who identify as BIPOC (83%); or who have a lower household income (83%).



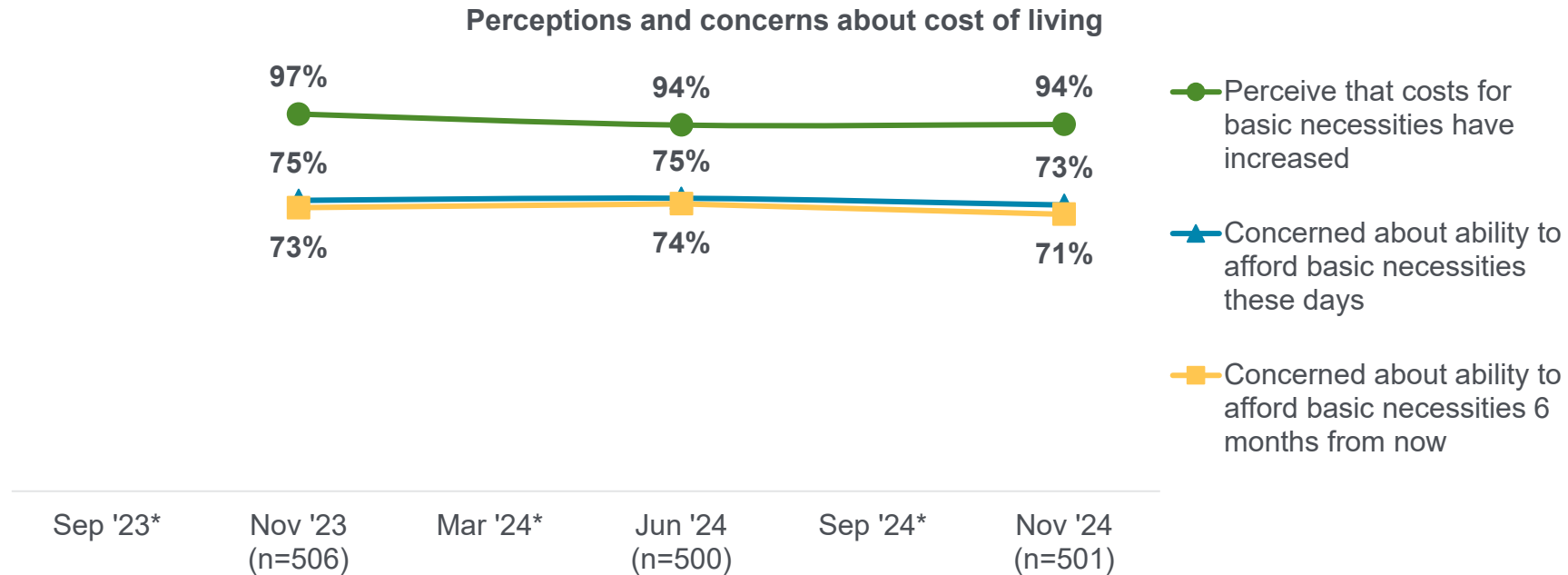
CL2. How concerned are you about your ability to afford your basic necessities these days?

CL3. And how concerned are you about your ability to afford your basic necessities 6 months from now?

Base: all respondents (n=501)

Tracking perceptions of cost of living

Calgarians' perceptions and concerns about the cost of living in the city have remained consistent since November 2023.



* Question asked semi-annually, starting on Nov 2023, statistical testing conducted against previous quarter with data.

CL1. Over the past 12 months, have the costs for your basic necessities, such as your rent or mortgage, utilities, food, and clothing ...

CL2. How concerned are you about your ability to afford your basic necessities these days?

CL3. And how concerned are you about your ability to afford your basic necessities 6 months from now?

Base: all respondents

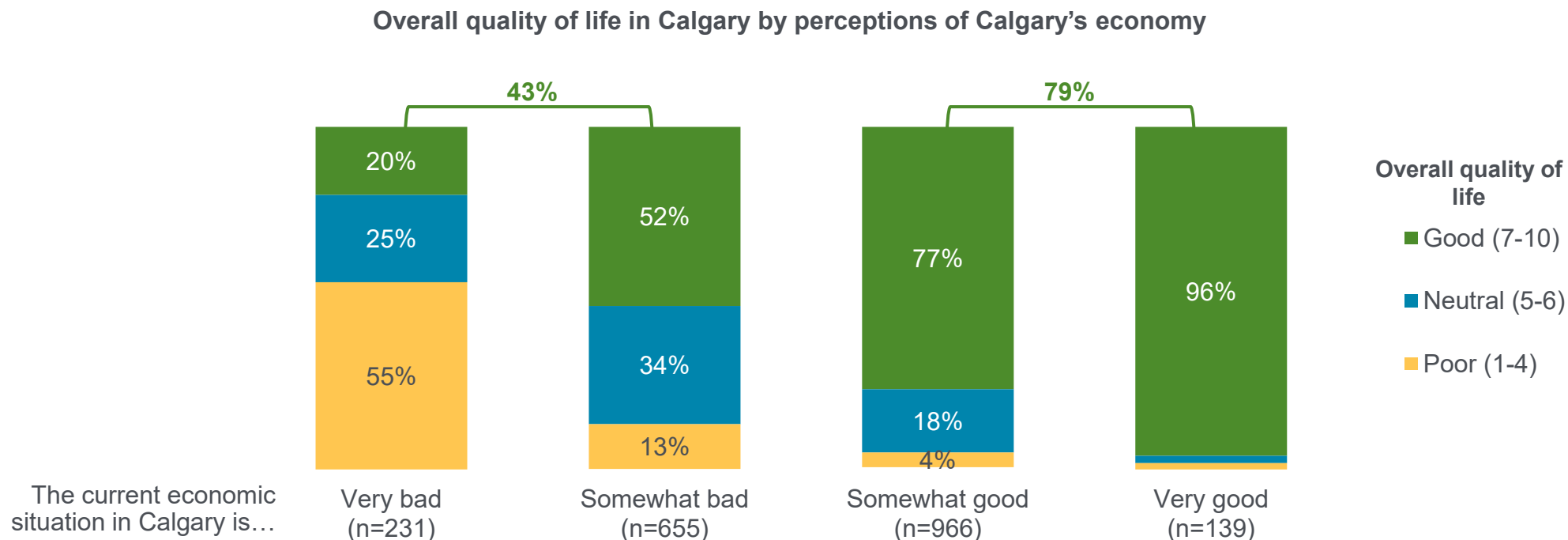


Detailed findings

Drivers of perception of current economic situation

Impact of perceptions of the current economic situation in Calgary on overall quality of life

Looking at the data collected throughout 2024, Calgarians' perceptions of their overall quality of life in Calgary is closely associated¹ to their views about the City's current economic situation. The vast majority (79%) of those who perceive Calgary's economic situation as somewhat or very good also rate their quality of life in the City as "good". Conversely, less than one-half (43%) of Calgarians who perceive the City's economic situation as "bad" perceive their quality of life in the City to be "good".



¹ Spearman correlation of .486, Calgarians rating the economy as good are more likely to rate the overall quality of life as good.

Q2. On a scale of "1" to "10" where "1" represents "very poor" and "10" represents "very good," how would you rate the overall quality of life in Calgary today?

Q6. How would you describe the current economic situation in...? [Calgary]

Base: 2024 respondents excluding "Don't know" and "Prefer not to answer" (n=see above).

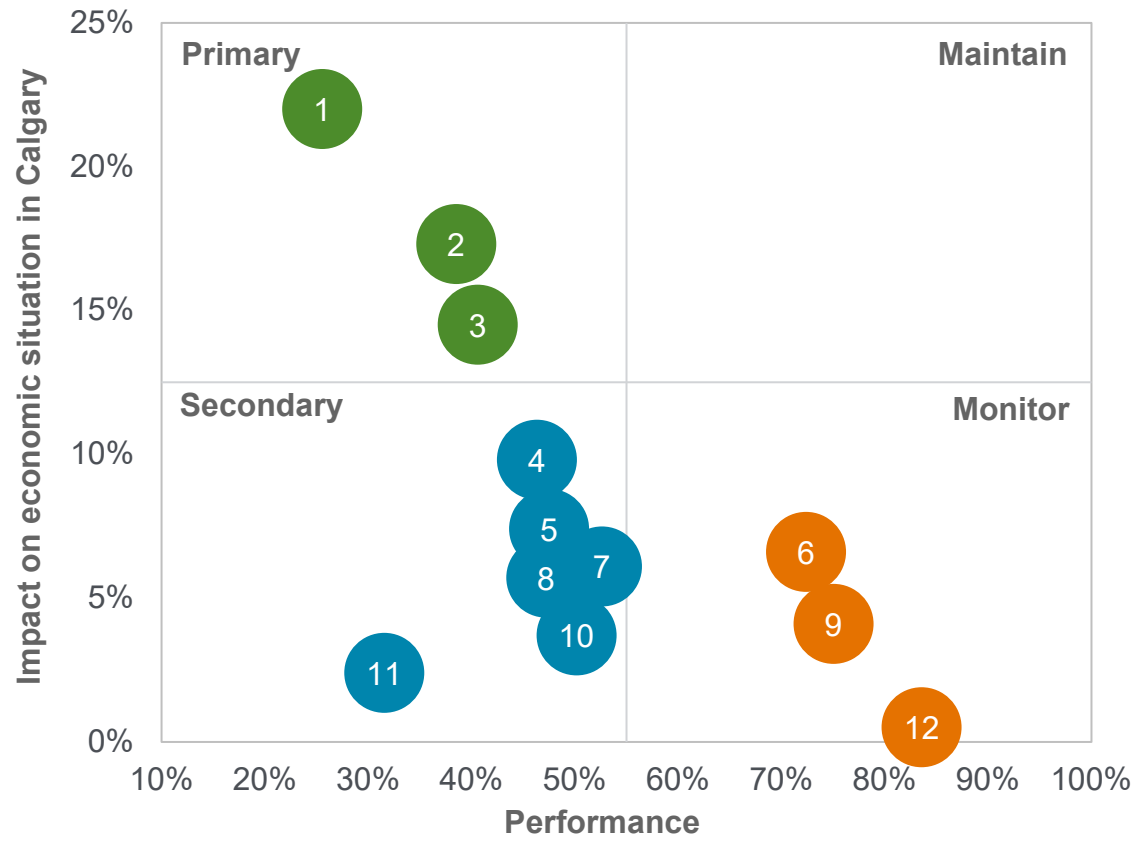
Impact of perceptions on ratings of Calgary’s economic situation (KDA)

To help determine which perceptions of the role of the city in economic recovery, investments, and cost of living have the largest impact of ratings of the current economic situation in Calgary, and thus on Calgarian’s overall quality of life in the City, it is useful to look at both the strength of the relationship between these perceptions and ratings of the economic situation in Calgary as well as The City’s current performance on each of these metrics. This is done by plotting each driver on a quadrant chart and grouping them by the quadrant they appear in.



Impact of perceptions on ratings of Calgary's economic situation

Concerns about affording basic necessities, expectations regarding the unemployment rate, and views on whether it is a good time to start a business in Calgary have the greatest impact on perceptions of Calgary's economic situation and are areas where relatively fewer Calgarians express positive opinions.



| Impact on perceptions of current economic situation in Calgary | | Impact | Performance ¹ |
|--|---|--------|--------------------------|
| 1 | Ability to afford basic necessities [Not concerned] | 22.0% | 26% |
| 2 | Expect the unemployment rate get worse in 6 months [Disagree] | 17.3% | 39% |
| 3 | Now is a good time to start a new business in Calgary [Agree] | 14.5% | 41% |
| 4 | Municipal government taking appropriate measures [Agree] | 9.8% | 46% |
| 5 | The City is attracting investment from outside [Agree] | 7.4% | 48% |
| 6 | Now is a good time for companies to invest in Calgary [Agree] | 6.6% | 72% |
| 7 | Confidence in City's collaboration to help with economic recovery [Agree] | 6.1% | 53% |
| 8 | Trust in City's decision making to help with economic recovery [Agree] | 5.7% | 47% |
| 9 | Good or bad time for The City to invest in new projects [Good] | 4.1% | 75% |
| 10 | Trust in City's decision making when building projects [Agree] | 3.7% | 50% |
| 11 | The City is making an effort to reduce cost of local government [Agree] | 2.4% | 32% |
| 12 | Importance for the City to find balance between oil and gas [Agree] | 0.5% | 84% |

¹ Performance score is associated with the proportion of respondents who selected % top 2 (positive statement) or % bottom 2 (negative statement) as indicated in each statement between "[]".

Q6. How would you describe the current economic situation in...? [Calgary]

Base: 2024 respondents excluding "Prefer not to answer" (n=1985).



Detailed findings

Segment differences

Segment differences

- The tables on the next few slides show comparisons of key metrics by several sub-segments of Calgary's population.
- Any statistical differences between demographic groups are indicated with arrows to indicate where a group is statistically higher or lower than everyone else who is not part of that group.
 - To illustrate, the statistical tests performed when comparing three groups are as follows:



- This approach identifies differences between one group and everyone else who is not part of that group. To illustrate using the example below, 55+ year olds are significantly more likely to believe that the current economic situation in Calgary is good compared everyone who is not part of that group (i.e., those aged 18 to 54).
- Note that we cannot conclude that this sentiment is lower for those who are 55+ years old when compared 18-to-34-years-old or 35-to-54-years-old individually (it may not be true). Don't know, prefer not to answer, and prefer to self describe are excluded.

| | Age group | | |
|---|-----------------|------------------|----------------|
| | 18-34 (n=82) | 35-54 (n=185) | 55+ (n=234) |
| Current economic situation: Canada (% good) | 56% | 61% | 75% ↑ |

Segment differences

- Men in Calgary are more optimistic about the economic situation of Calgary and Alberta (57% and 59%) compared to women (43% and 47%).
- Older Calgarians (aged 55 and older) are more optimistic about the economic situation in Calgary (61%) and Alberta (65%). They are also more likely to describe the overall quality of life in Calgary as “good”. Younger Calgarians (aged 18 to 34) in contrast are less optimistic about the current economic situation in Alberta when compared to older age groups and are less likely to describe the overall quality of life in Calgary as “good”.
- A higher percentage of residents in the Northwest (68%) report a good quality of life in Calgary compared to other regions, while a lower percentage in the Northeast (40%) share that sentiment. Residents in the Southeast have lower expectations of the economy in six months as just 9% expect a stronger economy. Southeast residents are more likely to agree that it is a good time for infrastructure investments (83%).

| | Gender | | Age group | | | Quadrant | | | |
|--|------------------|----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------|----------------|
| | Woman (n=217) | Man (n=274) | 18-34 (n=78) | 35-54 (n=171) | 55+ (n=252) | S.W. (n=140) | S.E. (n=132) | N.W. (n=141) | N.E. (n=88) |
| Overall quality of life in Calgary (% good) | 57% | 60% | 47% ↓ | 57% | 69% ↑ | 62% | 57% | 68% ↑ | 40% ↓ |
| Current economic situation: Calgary (% good) | 43% ↓ | 57% ↑ | 42% | 45% | 61% ↑ | 51% | 52% | 50% | 45% |
| Current economic situation: Alberta (% good) | 47% ↓ | 59% ↑ | 41% ↓ | 52% | 65% ↑ | 55% | 53% | 54% | 50% |
| Current economic situation: Canada (% good) | 36% | 38% | 30% | 38% | 42% | 37% | 37% | 38% | 34% |
| Expectation of economy in six months (% stronger) | 17% | 17% | 21% | 17% | 14% | 20% | 9% ↓ | 16% | 25% |
| Good or bad time for infrastructure investments (% good time) | 74% | 77% | 79% | 75% | 73% | 73% | 83% ↑ | 71% | 76% |

Base: all respondents (excl. those who prefer to self describe or prefer not say for Gender)

ISC: Unrestricted

2024 Economic Perspectives Research Report | December 2024

↑ Statistically higher than the result of **all other segments combined**
 ↓ Statistically lower than the result of **all other segments combined**

Segment differences

- Lower-income Calgarians (earning less than \$90k) are less positive about the overall quality of life in Calgary (50%) compared to those with annual household incomes of \$90k or more (68%).
- Individuals identifying as BIPOC (27%) are more likely to expect the economy to become stronger in six months compared to Calgarians that do not identify as BIPOC (14%).

| | Children in HH | | BIPOC | | Household income | | |
|--|----------------|---------------|---------------|---------------|-------------------|--------------------------|--------------------|
| | Yes (n=152) | No (n=343) | Yes (n=97) | No (n=389) | <\$90k (n=160) | \$90k-<\$150k (n=137) | \$150k+ (n=145) |
| Overall quality of life in Calgary (% good) | 57% | 59% | 51% | 61% | 50% ↓ | 59% | 68% ↑ |
| Current economic situation: Calgary (% good) | 47% | 52% | 45% | 51% | 44% | 51% | 57% |
| Current economic situation: Alberta (% good) | 52% | 55% | 46% | 55% | 47% | 55% | 58% |
| Current economic situation: Canada (% good) | 36% | 38% | 33% | 38% | 35% | 41% | 36% |
| Expectation of economy in six months (% stronger) | 19% | 16% | 27% ↑ | 14% ↓ | 19% | 15% | 19% |
| Good or bad time for infrastructure investments (% good time) | 75% | 76% | 74% | 77% | 72% | 76% | 82% |

Base: all respondents (excl. those who don't know (household income), prefer not to say (children in HH, BIPOC, household income), and prefer to self-describe (BIPOC)).



Respondent profile

Respondent profile

| Gender | Weighted % | Unweighted % |
|-------------------------|------------|--------------|
| Woman | 50% | 43% |
| Man | 48% | 55% |
| Non-binary person | 1% | 1% |
| Prefer to self-describe | <1% | <1% |
| Prefer not to answer | 1% | 1% |

| Quadrant | Weighted % | Unweighted % |
|-----------|------------|--------------|
| Southwest | 29% | 28% |
| Southeast | 24% | 26% |
| Northwest | 28% | 28% |
| Northeast | 20% | 18% |

| Age | Weighted % | Unweighted % |
|-------|------------|--------------|
| 18-24 | 7% | 4% |
| 25-34 | 23% | 11% |
| 35-44 | 19% | 18% |
| 45-54 | 18% | 17% |
| 55-64 | 15% | 23% |
| 65-74 | 11% | 16% |
| 75+ | 7% | 12% |

| Employment status | |
|--|-----|
| Employed full-time | 61% |
| Employed part-time | 11% |
| Retired | 20% |
| Unemployed | 6% |
| Student | 4% |
| Looking after home / family | 2% |
| Unpaid / volunteer work | 2% |
| Unable to work because of sickness or disability | 2% |
| Other | <1% |
| Prefer not to answer | 0% |

| Annual household income | |
|----------------------------------|-----|
| Less than \$90,000 | 33% |
| \$90,000 to just under \$150,000 | 27% |
| \$150,000 and over | 29% |
| Don't Know | 2% |
| Prefer not to answer | 9% |

| Business owner | |
|----------------------|-----|
| Yes | 21% |
| No | 79% |
| Prefer not to answer | 0% |

| Education | |
|--|-----|
| Completed high school or less | 20% |
| Some post secondary or completed a college diploma | 28% |
| Completed university degree | 52% |
| Prefer not to answer | 1% |

| Tenure in Calgary | |
|--------------------|-----|
| Less than 10 years | 12% |
| 10-20 years | 23% |
| 21-30 years | 26% |
| 31-40 years | 14% |
| Over 40 years | 24% |
| Prefer not to say | 2% |

Base: all respondents (n=501)

Respondent profile

| People in household | |
|----------------------|-----|
| 1 | 20% |
| 2 | 29% |
| 3 | 14% |
| 4 or more | 36% |
| Prefer not to answer | 1% |

| Children in household | |
|-----------------------|-----|
| Yes | 35% |
| No | 65% |
| Prefer not to answer | 0% |

| Senior in household | |
|----------------------|-----|
| Yes | 27% |
| No | 72% |
| Prefer not to answer | <1% |

| Racialized | |
|-------------------------|-----|
| Yes | 21% |
| No | 77% |
| Prefer to self-describe | 0% |
| Prefer not to answer | 3% |

| Identify as Indigenous | |
|-------------------------------|-----|
| Yes - First Nations | 1% |
| Yes - Métis | 1% |
| Yes - Inuit | <1% |
| Yes - Prefer to self-describe | <1% |
| No | 97% |
| Prefer not to answer | <1% |

| Disability in household | |
|-------------------------------|-----|
| Yes - myself | 15% |
| Yes - someone in my household | 13% |
| No | 74% |
| Prefer not to answer | <1% |

| Identify as 2SLGBTQ+ | |
|----------------------|-----|
| Yes | 8% |
| No | 91% |
| Prefer not to answer | 1% |

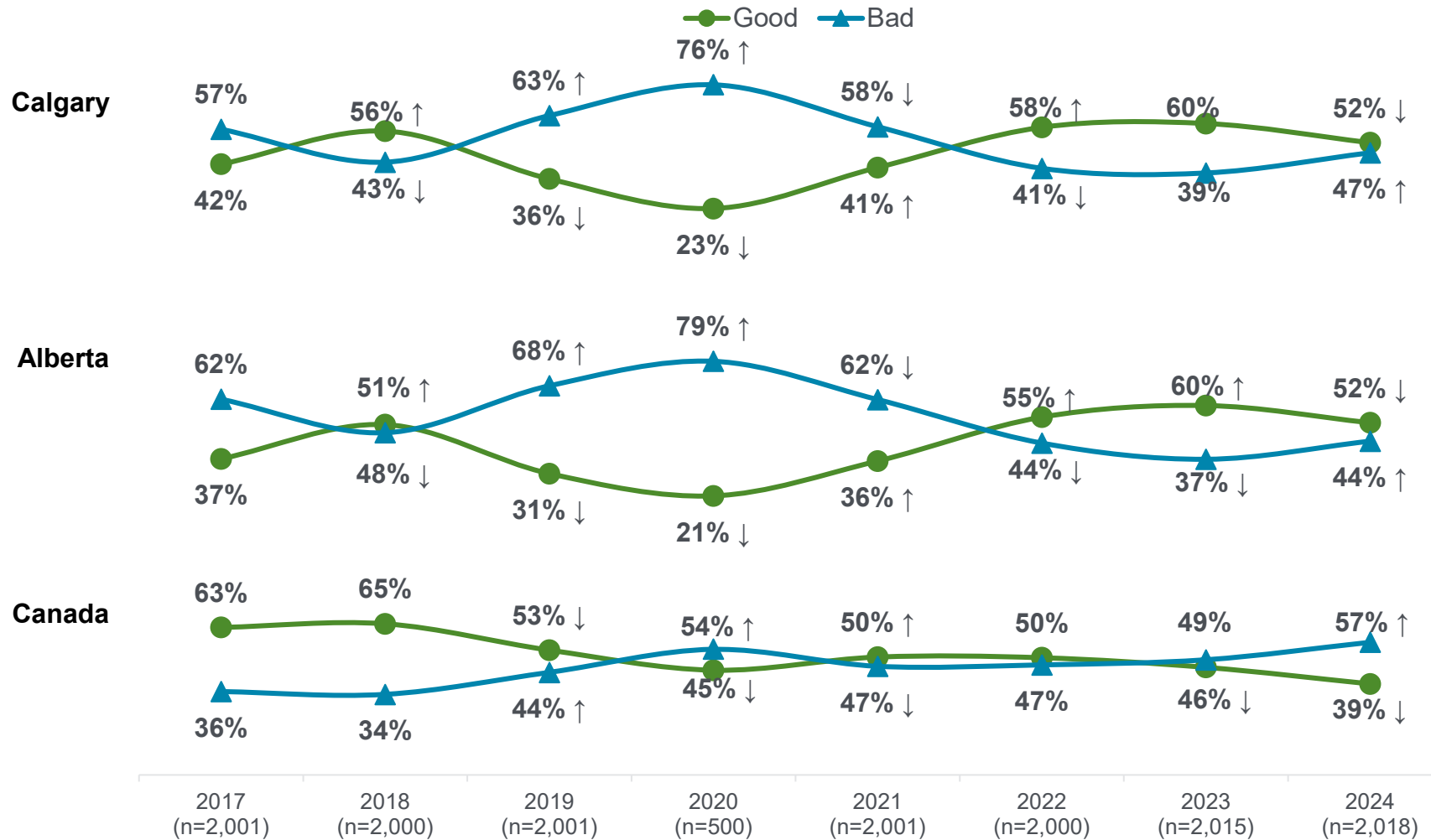
Base: all respondents (n=501)



Appendix

Tracking

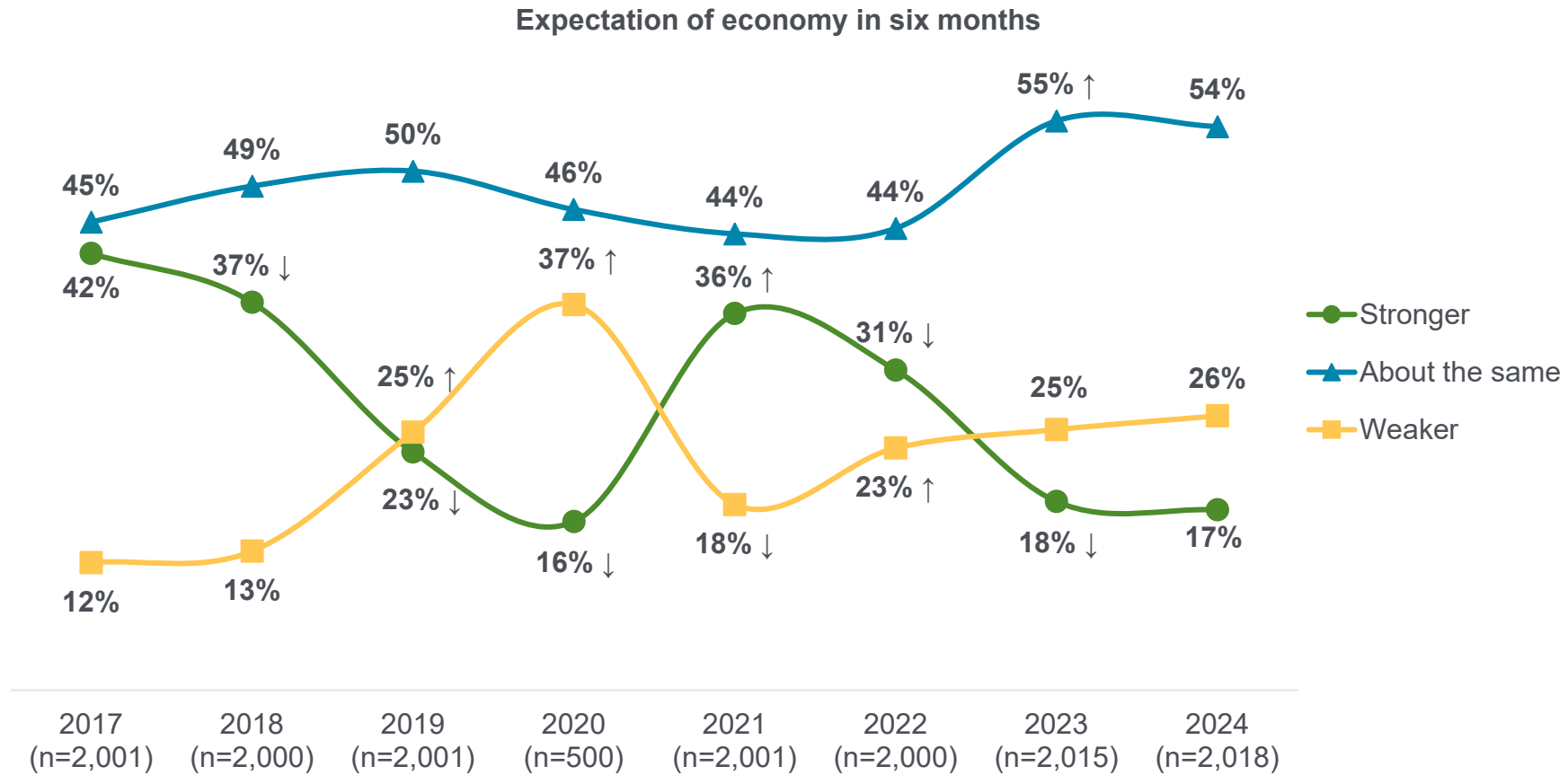
Tracking current economic situation



Q6. How would you describe the current economic situation in...?

Base: all respondents

Tracking future economy in Calgary



Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Base: all respondents

Tracking perceptions of The City's role in economic recovery and investments

| | 2017 (n=2,001) | 2018 (n=2,000) | 2019 (n=2,001) | 2020 (n=500) | 2021 (n=2,001) | 2022 (n=2,000) | 2023 (n=2,015) | 2024 (n=2,018) |
|--|-------------------|-------------------|-------------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy | 91% | 92% | 91% | 92% | 88% ↓ | 88% | 86% ↓ | 84% |
| I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery | 77% | 73% ↓ | 66% ↓ | 68% | 70% | 65% ↓ | 64% | 53% ↓ |
| I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities | | | | | 67% | 63% ↓ | 62% | 50% ↓ |
| I trust The City of Calgary to make the right decisions to help our city through this economic recovery | 73% | 68% ↓ | 63% ↓ | 66% | 66% | 61% ↓ | 59% | 47% ↓ |
| The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery | | | | | 61% | 58% | 55% | 46% ↓ |
| The City of Calgary is making an effort to reduce the cost of local government | | | | | 41% | 39% | 38% | 32% ↓ |

Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.

Base: all respondents

↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave

Tracking perceptions of The City's role in economic recovery and investments

| | 2017 (n=2,001) | 2018 (n=2,000) | 2019 (n=2,001) | 2020 (n=500) | 2021 (n=2,001) | 2022 (n=2,000) | 2023 (n=2,015) | 2024 (n=2,018) |
|--|-------------------|-------------------|-------------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| Now is a good time for companies to be investing in Calgary | 77% | 73% ↓ | 68% ↓ | 62% ↓ | 74% ↑ | 81% ↑ | 76% ↓ | 72% ↓ |
| Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today | 37% | 36% | 50% ↑ | 60% ↑ | 39% ↓ | 39% | 50% ↑ | 57% ↑ |
| Calgary as a city is attracting enough investment from outside of the province to help our economy | | | | | 37% | 47% ↑ | 49% | 48% |
| Now is a good time to start a new business in Calgary | 43% | 44% | 33% ↓ | 31% | 39% ↑ | 49% ↑ | 43% ↓ | 41% |

Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?

Base: all respondents

↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave



Questionnaire

Questionnaire

Economic Perspectives Q4 2024 [Survey]



The City of Calgary

Generated on 2024-11-15 at 10:23:32 MT

Int0

Hello, I'm _____ with Advanis, calling on behalf of The City of Calgary. We are conducting a study among adult Calgarians about several important issues and we'd like to include your views. Are you 18 years of age or older and do you currently live in Calgary?

IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "2024 Economic Perspectives Survey." City Staff would be happy to address your concerns.

IF ASKED: The survey will take approximately 10-15 minutes.

- ☐ 1 Yes
- ☐ 2 No, getting an adult *(Show if is landline (phonetype = 1))*
- ☐ 3 No, refusal
- ☐ 4 No, callback
- ☐ 5 No, under 18 *(Show if is wireless (phonetype = 2))*
- ☐ 6 No, does not live in Calgary

Int0b *Show if getting person (Int0 = 2)*

Hello, I'm _____ with Advanis, calling on behalf of The City of Calgary. We are conducting a study among adult Calgarians about several important issues and we'd like to include your views. Are you 18 years of age or older and do you currently live in Calgary?

IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "2024 Economic Perspectives Survey." City staff would be happy to address your concerns.

- ☐ 1 Yes
- ☐ 2 No, refusal
- ☐ 3 No, callback
- ☐ 4 No, under 18 *(Show if is wireless (phonetype = 2))*
- ☐ 5 No, does not live in Calgary

TERMINATES

NCInt *Show if Not Calgary ((Int0 = 6) OR (Int0b = 5) OR (Int0under35 = 6) OR (inbound1 = 6))*

Unfortunately, we need to speak with residents of Calgary. Thank you for your time. Good-bye.

Status Code: 502

T4 *Show if Under 18 ((Int0 = 5) OR (Int0b = 4) OR (inbound1 = 5))*

Unfortunately, we need to speak with individuals 18 or older. Thank you for your time. Good-bye.

Status Code: 501

T13 *Show if int0under35 not 18 to 34 (Int0under35 = 5)*

Unfortunately, we need to speak with individuals who are 18 to 34 years old. Thank you for your time. Good-bye.

Status Code: 574

Questionnaire

SCREENERS

QS7

Great! Your participation is voluntary and this call may be recorded for quality control purposes. The survey will take approximately 15 minutes and your responses will remain confidential, and you will not be personally identified. Any personal information collected in this survey is under the authority of the Freedom of Information and Protection of Privacy Act, 33(c) and is used solely for the review and improvement of City of Calgary programs and services.

Do you have any questions about the collection or use of your information?

- ☐ 1 Yes
- ☐ 2 No
- ☐ 3 Refusal
- ☐ 4 Call back later

QS7info Show if QS7 Yes (QS7 = 1)

A City of Calgary Research Coordinator will be able to answer any questions about the collection or use of your information. You can contact them via phone, email, or regular mail and mention the "2024 Economic Perspectives Survey". What contact information would you prefer?

If phone: 403-268-5287

If email: research@calgary.ca

If mail: Research Coordinator, The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5

T1 Show if QS7 Refusal (QS7 = 3)

Thank you for your time. Good-bye.

Status Code: 1000

QSEX

DO NOT ASK; RECORD GENDER

- ☐ 1 Male
- ☐ 2 Female

QS4

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

- ☐ 1 18 to 19
- ☐ 2 20 to 24
- ☐ 3 25 to 34
- ☐ 4 35 to 44
- ☐ 5 45 to 54
- ☐ 6 55 to 64
- ☐ 7 65 to 74
- ☐ 8 75 and older
- ☐ 9 [\[DO NOT READ\]](#) Prefer not to say

T5 Show if int1 ref (QS4 = 9)

Unfortunately, we need to confirm your age to continue. Thank you for your time. Good-bye.

Status Code: 503

QS1

Can you tell me which quadrant of the city you live in?

[WAIT FOR RESPONSE - READ LIST TO CLARIFY IF NEEDED.](#)

- ☐ 1 Southwest
- ☐ 2 Southeast
- ☐ 3 Northwest
- ☐ 4 Northeast
- ☐ 5 [\[DO NOT READ\]](#) Prefer not to say
- ☐ 6 [\[DO NOT READ\]](#) Does not live in Calgary

T6 Show if QS1 DK Ref (QS1 = 5)

[Unfortunately](#), we need to confirm what part of The City you live in to continue. Thank you for your time. Good-bye.

Status Code: 504

T8 Show if QS1 Outside Calgary (QS1 = 6)

[Unfortunately](#), we only need to speak with people who live in Calgary. Thank you for your time. Good-bye.

Status Code: 502

Questionnaire

GENERAL

PERSPECTIVES OF QUALITY OF LIFE AND THE ECONOMY

Q2

To begin, on a scale of "1" to "10" where "1" represents "very poor" and "10" represents "very good" how would you rate the overall quality of life in Calgary today?

- ☐ 1 1 = Very poor
- ☐ 2 2
- ☐ 3 3
- ☐ 4 4
- ☐ 5 5
- ☐ 6 6
- ☐ 7 7
- ☐ 8 8
- ☐ 9 9
- ☐ 10 10 = Very good
- ☐ 11 [DO NOT READ] Don't know
- ☐ 12 [DO NOT READ] Prefer not to answer

Q6

How would you describe the current economic situation in [READ FIRST ITEM]? Is it very good, somewhat good, somewhat bad or very bad?

How about in ...?

- 1. Canada *
- 2. Alberta *
- 3. Calgary *

*Levels marked with * are randomized*

- ☐ 1 Very good
- ☐ 2 Somewhat good
- ☐ 3 Somewhat bad
- ☐ 4 Very bad
- ☐ 9 [DO NOT READ] Don't know
- ☐ 10 [DO NOT READ] Prefer not to answer

Q7

Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

- ☐ 1 Much stronger
- ☐ 2 Somewhat stronger
- ☐ 3 About the same
- ☐ 4 Somewhat weaker
- ☐ 5 Much weaker
- ☐ 9 [DO NOT READ] Don't know
- ☐ 10 [DO NOT READ] Prefer not to answer

Q9a

In this survey, when we say 'The City of Calgary' or 'The City', we mean the Municipal government including Council and Administration.

Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements about the role you would like to see The City of Calgary play in the current economic recovery.

1. I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery *
2. I trust The City of Calgary to make the right decisions to help our city through this economic recovery *
3. I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities *
4. It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy *
5. The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery *
6. The City of Calgary is making an effort to reduce the cost of local government *

*Levels marked with * are randomized*

- ☐ 1 Strongly agree
- ☐ 2 Somewhat agree
- ☐ 3 Somewhat disagree
- ☐ 4 Strongly disagree
- ☐ 9 [DO NOT READ] Don't know
- ☐ 10 [DO NOT READ] Prefer not to answer

Questionnaire

Q9b

And to what extent do you agree or disagree with each of the following statements about the current economy?

REPEAT LIST ONLY IF NEEDED

1. Now is a good time to start a new business in Calgary *
2. Now is a good time for companies to be investing in Calgary *
3. Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today *
4. Calgary as a city is attracting enough investment from outside of the province to help our economy *

*Levels marked with * are randomized*

- ☐ 1 Strongly agree
- ☐ 2 Somewhat agree
- ☐ 3 Somewhat disagree
- ☐ 4 Strongly disagree
- ☐ 5 [\[DO NOT READ\]](#) Don't know
- ☐ 6 [\[DO NOT READ\]](#) Prefer not to answer

PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

III1

Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?

- ☐ 1 Very good time
- ☐ 2 Somewhat good time
- ☐ 3 Somewhat bad time
- ☐ 4 Very bad time
- ☐ 5 [\[DO NOT READ\]](#) Don't know
- ☐ 6 [\[DO NOT READ\]](#) Prefer not to answer

II2BOS1

We would like to get your input on the level of importance you would place on different types of infrastructure projects. For each of the next few questions, I will list two types of projects and will ask you to let me know which, if any, type of projects you think is most important.

Items to show:

1. Projects that will be used for multiple purposes, for example both recreation and arts
2. Projects that will create jobs
3. Projects that will enhance economic diversity
4. Projects that will have a positive impact
5. Projects that will encourage trade and tourism

To start, which of the following types of projects do you think is most important?

- ☐ 1 [ITEM 1]
- ☐ 2 Or [ITEM 2]
- ☐ 3 Or neither of these?
- ☐ 4 [\[DO NOT READ\]](#) Don't know
- ☐ 5 [\[DO NOT READ\]](#) Prefer not to answer

*Levels marked with * are randomized*

II2BOS2

And which, if any, of the following types of projects do you think is most important?

- ☐ 1 [ITEM 1]
- ☐ 2 Or [ITEM 2]
- ☐ 3 Or neither of these?
- ☐ 4 [\[DO NOT READ\]](#) Don't know
- ☐ 5 [\[DO NOT READ\]](#) Prefer not to answer

*Levels marked with * are randomized*

II2BOS3

The next two are:

ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- ☐ 1 [ITEM 1]
- ☐ 2 Or [ITEM 2]
- ☐ 3 Or neither of these?
- ☐ 4 [\[DO NOT READ\]](#) Don't know
- ☐ 5 [\[DO NOT READ\]](#) Prefer not to answer

*Levels marked with * are randomized*

Questionnaire

II2B054

And the next two are:

ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- ☐ 1 [ITEM 1]
- ☐ 2 Or [ITEM 2]
- ☐ 3 Or neither of these?
- ☐ 4 [\[DO NOT READ\] Don't know](#)
- ☐ 5 [\[DO NOT READ\] Prefer not to answer](#)

*Levels marked with * are randomized*

II2B055

And one last set:

ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- ☐ 1 [ITEM 1]
- ☐ 2 Or [ITEM 2]
- ☐ 3 Or neither of these?
- ☐ 4 [\[DO NOT READ\] Don't know](#)
- ☐ 5 [\[DO NOT READ\] Prefer not to answer](#)

*Levels marked with * are randomized*

PERSPECTIVES OF AFFORDABILITY OF BASIC NECESSITIES

CL1

Over the past 12 months, have the costs for your [basic necessities](#), such as your rent or mortgage, utilities, food, and clothing...

- ☐ 1 Increased a lot
- ☐ 2 Increased somewhat
- ☐ 3 Stayed about the same
- ☐ 4 Or decreased
- ☐ 5 [\[DO NOT READ\] Don't know](#)
- ☐ 6 [\[DO NOT READ\] Prefer not to answer](#)

CL2

How concerned are you about your ability to afford your [basic necessities](#) these days?

- ☐ 1 Very concerned
- ☐ 2 Somewhat concerned
- ☐ 3 Not very concerned
- ☐ 4 Not at all concerned
- ☐ 5 [\[DO NOT READ\] Don't know](#)
- ☐ 6 [\[DO NOT READ\] Prefer not to answer](#)

CL3

And how concerned are you about your ability to afford your [basic necessities](#) 6 months from now?

[\[REPEAT SCALE IF NEEDED\]](#)

- ☐ 1 Very concerned
- ☐ 2 Somewhat concerned
- ☐ 3 Not very concerned
- ☐ 4 Not at all concerned
- ☐ 5 [\[DO NOT READ\] Don't know](#)
- ☐ 6 [\[DO NOT READ\] Prefer not to answer](#)

Questionnaire

DEMOGRAPHICS

QD1

We are almost finished. I am now going to ask you some demographic questions that allow us to group responses and to sort the information we collect. All your responses will be held in strict confidence and will not be attributed to you.

In what year were you born?

Minimum: 1900, Maximum: 2005

☐ -a Prefer not to answer

QD2

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

Minimum: 1, Maximum: 50

_____ people

☐ -a Prefer not to answer

QD3 *Show if HH Members More Than 1 (QD2 > 1)*

Do you have any children under the age of 18 living in your household?

DO NOT READ LIST

- ☐ 1 Yes
☐ 2 No
☐ 9 [\[DO NOT READ\]](#) [Prefer](#) not to answer

QD4 *Show if HH Members More Than 1 and under 65 ((QD2 > 1) AND (Q54 = 1,2,3,4,5,6))*

Is there anyone aged 65 years or older living in your household?

DO NOT READ LIST

- ☐ 1 Yes
☐ 2 No
☐ 9 [\[DO NOT READ\]](#) [Prefer](#) not to answer

QD6

How many years have you lived in Calgary?

IF LESS THAN 1 YEAR, ENTER 0

Minimum: 0, Maximum: 100

_____ years

☐ -a Prefer not to answer

QD7

Which of the following best describes the highest level of schooling that you have obtained?

If the respondent mentions that they completed a post-graduate degree / Master's / PhD, please code as "completed a university certificate, diploma or degree".

- ☐ 1 Did not complete high school or equivalent
☐ 2 Completed high school or equivalent
☐ 3 Completed a Registered Apprenticeship or other trades certificate or diploma
☐ 4 Completed a college or other non-university certificate or diploma
☐ 5 Or completed a university certificate, diploma or degree
☐ 9 [\[DO NOT READ\]](#) Prefer not to answer

QD8

What best describes your current employment status? Please stop me when I get to your category. Would you say you are...

READ LIST; Select up to two responses.

IF NEEDED: "Please tell me the two that best describe your status"

- ☐ 1 Full time employed or self employed [\[DO NOT READ: 30 hours or more per week\]](#)
☐ 2 Part time employed or self-employed [\[DO NOT READ: less than 30 hours per week\]](#)
☐ 3 Retired
☐ 4 Looking after home and/or family
☐ 5 Unable to work because of sickness or disability
☐ 6 Unemployed
☐ 7 Doing unpaid or voluntary work
☐ 8 Student
☐ 96 [\[DO NOT READ\]](#) Other (specify:)
☐ 99 [\[DO NOT READ\]](#) Prefer not to answer *(Exclusive)*

Questionnaire

QD9 *Show if Employed (QD8_1 = 1 OR QD8_2 = 1)*

Do you own or operate a business in Calgary?

- ☐ 1 Yes, own and operate a business
- ☐ 2 Yes, own a business
- ☐ 3 Yes, operate a business
- ☐ 4 No, don't own or operate a business
- ☐ 99 [\[DO NOT READ\]](#) Prefer not to answer

QD10

Which of the following categories best describes the total annual income, before taxes, of all the members of your household? Please stop me when I get to your category.

[READ LIST](#)

- ☐ 1 Less than \$90,000
- ☐ 2 \$90,000 to just under \$150,000
- ☐ 3 \$150,000 and over
- ☐ 9 [\[DO NOT READ\]](#) Don't Know
- ☐ 10 [\[DO NOT READ\]](#) Prefer not to answer

QD10ab *Show if QD10 Answered (QD10 = 1,2,3)*

Would that be...

[READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST](#)

- ☐ 1 Less than \$30,000 *(Show if D10a Under90k (QD10 = 1))*
- ☐ 2 \$30,000 to just under \$45,000 *(Show if D10a Under90k (QD10 = 1))*
- ☐ 3 \$45,000 to just under \$60,000 *(Show if D10a Under90k (QD10 = 1))*
- ☐ 4 \$60,000 to just under \$75,000 *(Show if D10a Under90k (QD10 = 1))*
- ☐ 5 \$75,000 to just under \$90,000 *(Show if D10a Under90k (QD10 = 1))*
- ☐ 6 \$90,000 to just under \$105,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- ☐ 7 \$105,000 to just under \$120,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- ☐ 8 \$120,000 to just under \$135,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- ☐ 9 \$135,000 to just under \$150,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- ☐ 10 \$150,000 to just under \$175,000 *(Show if D10a 150k plus (QD10 = 3))*
- ☐ 11 \$175,000 to just under \$200,000 *(Show if D10a 150k plus (QD10 = 3))*
- ☐ 12 \$200,000 to just under \$225,000 *(Show if D10a 150k plus (QD10 = 3))*
- ☐ 13 \$225,000 to just under \$250,000 *(Show if D10a 150k plus (QD10 = 3))*
- ☐ 14 \$250,000 and over *(Show if D10a 150k plus (QD10 = 3))*
- ☐ 15 [\[DO NOT READ\]](#) Don't Know
- ☐ 16 [\[DO NOT READ\]](#) Prefer not to answer

QD11

Gender refers to how people feel, see, and express themselves in their day-to-day lives. What is your gender?

[DO NOT READ LIST](#)

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

- ☐ 1 Man
- ☐ 2 Woman
- ☐ 3 Non-binary person
- ☐ 96 Prefer to self-describe (specify) _____
- ☐ 99 [\[DO NOT READ\]](#) Prefer not to answer

QD15

Are you Indigenous, that is, First Nations, Métis, or Inuit?

[MULTIPLE RESPONSES ARE ACCEPTED](#)

- ☐ 1 Yes - First Nations
- ☐ 2 Yes - Métis
- ☐ 3 Yes - Inuit
- ☐ 4 Yes - Prefer to self-describe (specify) _____
- ☐ 5 No *(Exclusive)*
- ☐ 99 [\[DO NOT READ\]](#) Prefer not to answer *(Exclusive)*

QD16 *Show if Not Indigenous (QD15_S = 1 OR QD15_99 = 1)*

Do you consider yourself a racialized person? A racialized person means someone, other than Indigenous people, who are non-Caucasian in race or non-white in colour.

- ☐ 1 Yes
- ☐ 2 No
- ☐ 96 Prefer to self-describe (specify) _____
- ☐ 99 [\[DO NOT READ\]](#) Prefer not to answer



Questionnaire

QD17

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

Select all that apply

- ☐ 1 Yes - myself
☐ 2 Yes - someone in my household
☐ 3 No (Exclusive)
☐ 99 [DO NOT READ] Prefer not to answer (Exclusive)

QD18

Do you consider yourself to be a member of the 2SLGBTQ+ community?

ONLY IF ASKED: 2SLGBTQ+ STANDS FOR TWO SPIRIT, LESBIAN, GAY, BI-SEXUAL, TRANSGENDER, QUEER OR QUESTIONING, WITH THE PLUS RECOGNIZING THERE IS ALSO A WIDE SPECTRUM OF IDENTITIES BEYOND THOSE IN THE ACRONYM

- ☐ 1 Yes
☐ 2 No
☐ 9 [DO NOT READ] Prefer not to answer

EndSection

F1a

Finally, The City of Calgary regularly engages with citizens about municipal matters. Would you be interested in participating in future City research? Your contact information will be shared with The City of Calgary for research purposes only. Names and contact details will never be attached to your responses to this survey.

- ☐ 1 Yes
☐ 2 No
☐ 3 [DO NOT READ] Don't know

F1b Show if F1a Yes (F1a = 1)

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

Read back email address phonetically to confirm.

☐ -a Prefer not to answer

F1c Show if F1a Yes (F1a = 1)

Could I please have your first and last name, and confirm your telephone number?

Number we dialed: <<sample.phone>>

If respondent indicates "this number is fine" please enter the phone number associated to this call.

First name: _____
Last name: _____
Telephone number: _____

☐ -a Prefer not to answer

end1

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

Status Code: -1



Contact

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 Customer Service and Communications
 The City of Calgary
Research@Calgary.ca