

Calgary



Economic Perspectives Research

Final Report

January 2024

Prepared by:





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Background and objectives

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 citizens on the topic of Calgary's economy, both current and future, to inform decision-making. Generally, four waves are conducted each year.

Objectives

The objectives of the survey include:

1. Measuring perceptions of the quality of life in Calgary; the current economic situation in Calgary, Alberta, and Canada; Calgary's economic recovery; and The City's role in economic recovery and encouraging investment.
2. Gauging levels of support for The City investing in infrastructure.
3. Determining perspectives on cost of living, including current and future concerns about affordability.

Methodology

The survey was conducted by Advanis from November 20th to November 28th, 2023, with 506 Calgary residents aged 18 and older via a telephone survey. The average time to complete the survey was 14 minutes.

The survey was conducted in English using numbers from both landlines (22%) and cell phones (78%) to obtain a random and statistically-representative sample of Calgarians.

The margin of error (MOE) for the total sample of n=506 is ± 4.4 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 80%. 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.

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



68%
(-3%pt) Rate the **quality of life** in Calgary as “good”



57%
(+2%pt) Rate the **economy** in Calgary as “good”

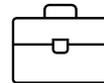


71%
(+2%pt) Expect the economy in Calgary to be **stronger or about the same** in the next six months

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



53%
(-8%pt) ↓ Trust The City to make the right decisions to **help the city through its economic recovery**



51%
(-7%pt) ↓ Expect Calgary’s **unemployment rate** to be worse six months from now

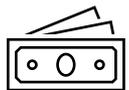


51%
(-4%pt) Agree The City is taking appropriate measures to **assist the economic recovery**

AFFORDABILITY OF BASIC NECESSITIES



97%* Believe the **costs of basic necessities have increased** over the past 12 months



75%* Are concerned about the ability to **afford their basic necessities these days**



73%* Are concerned about the ability to **afford their basic necessities six months from now**

INFRASTRUCTURE INVESTMENT



74%
(-3%pt) Thinks it is a good time for The City of Calgary to be investing in new projects

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

* New questions this wave.



2023 Key Trends

Communications and messaging about what The City is doing to boost the economy and create jobs, as well as efforts to reduce the cost of local government, will be critical to boosting Calgarians' confidence in the future of Calgary's economy.



Perceived quality of life, as well as expectations about the economy and employment in six months, have declined this year when compared to 2022.

-  **70%** -6%pt ↓ Rate quality of life in Calgary as “good”
-  **18%** -13%pt ↓ Expect Calgary’s economy to be stronger or about the same six months from now
-  **43%** -6%pt ↓ Agree now is a good time to start a new business
-  **50%** +11%pt ↑ Expect Calgary’s unemployment rate to be worse six months from now



Calgarians consider infrastructure projects that will create jobs to be most important, followed by projects that will enhance economic diversity.

Importance of infrastructure investments

-  **60%*** 1. Projects that will create jobs
-  **52%*** 2. Projects that will enhance economic diversity

* Not collected in previous years

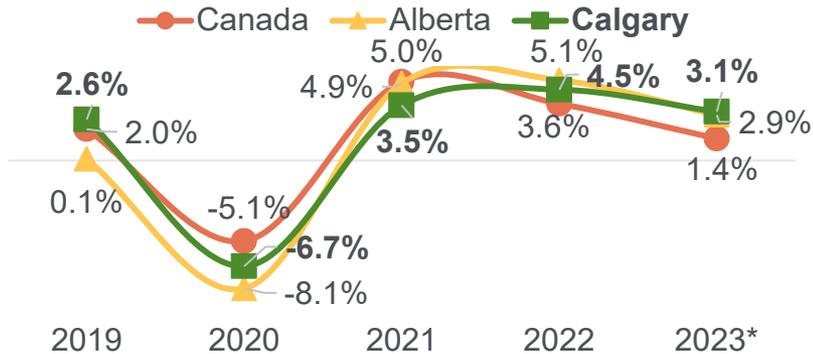
↑ Statistically higher than the previous year
↓ Statistically lower than the previous year

Numbers shown reflect 2023 results, including differences compared to 2022, where relevant.



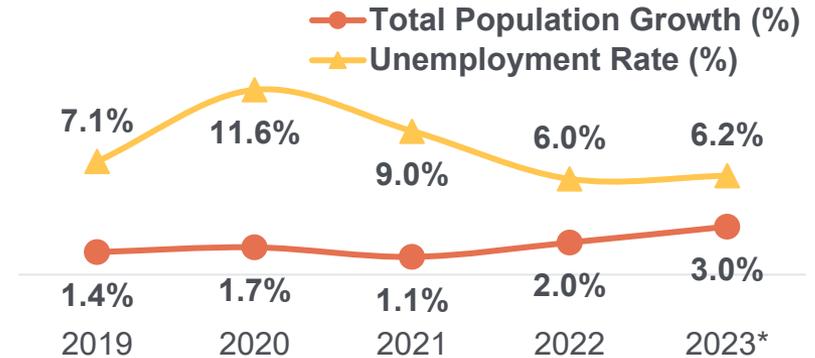
Survey context: Economic Indicators

REAL GROSS DOMESTIC PRODUCT GROWTH



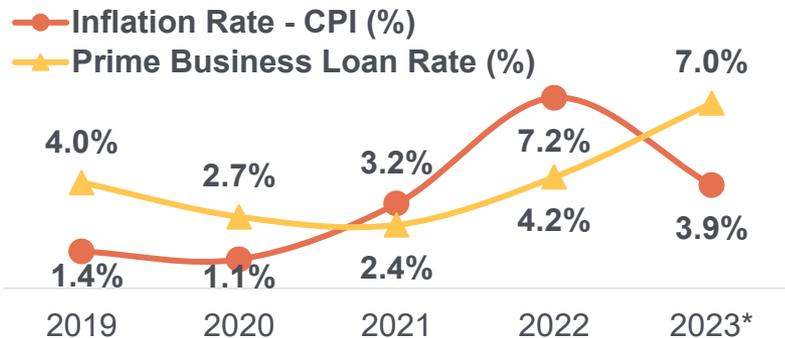
Real GDP growth was projected to decrease in 2023 at the municipal, provincial, and federal levels. Three-fifths of Calgarians describe the economy in Calgary as good compared to only two-fifths for Canada.

CALGARY INDICATORS



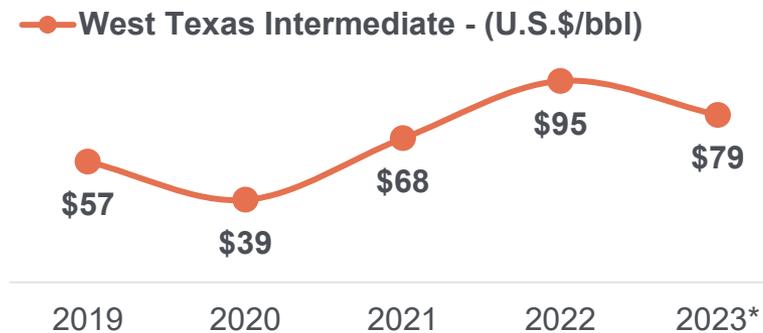
Despite population growth being projected to grow at an increasing rate and the unemployment rate to be stable at pre-pandemic levels, one-half of Calgarians expect unemployment to get worse in the next six months.

INFALATION AND INTEREST RATES



While the forecasted inflation rate has declined, last year's inflation rate, compounded by this year's increases in interest rates, now have three-quarters of Calgarians expressing concern about their ability to afford basic necessities, both now and in the near future.

PRICE OF OIL



Although oil prices (WTI) were expected to fall in 2023, over two-thirds of Calgarians expect the economy in Calgary to be stronger or about the same in 6 months from now.



Survey context: November 2023

June 7: Bank of Canada increases policy interest rate by 25 basis points (target at 4.75%).

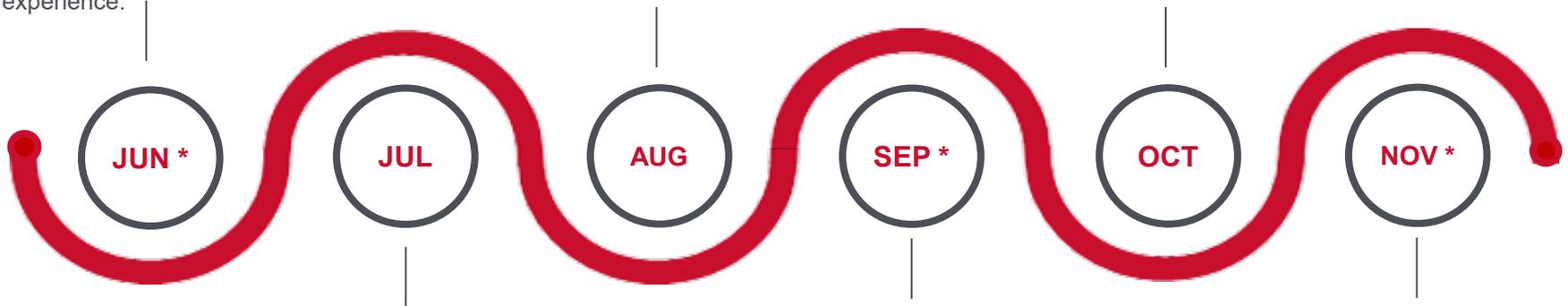
June 15: Startup Genome's Global Startup Ecosystem Report 2023 ranks Calgary in the 51-60 range as an emerging ecosystem based on strong performance in funding, connectedness, and talent / experience.

August 1: The Government of Canada, through PrairiesCan, announces \$6.1 million in funding towards a new City of Calgary run Technology Integration Centre and Calgary Economic Development which focuses on Calgary SMEs.

August 31: Report by Calgary Real Estate Board finds that Calgary home sales hit a record high in August.

October 5: A final agreement is signed to fund Calgary's future event centre with construction of the \$1.22-billion project scheduled to begin in 2024.

October 25: Bank of Canada holds policy interest rate steady (target at 5.00%).



July 12: Bank of Canada increases policy interest rate by 25 basis points (target at 5.00%).

July 14 : Calgary Stampede attendance hits 1.38 million; which is just short of the 1.41 million record set in 2012. The event is considered a boon for the hospitality, tech, agriculture, and finance sectors.

September 6: Bank of Canada holds policy interest rate steady (target at 5.00%).

September 17: World Petroleum Conference is hosted in Calgary for the second time. The expected economic value generated for Calgary from the event is \$88 million.

September 21: The Alberta government releases a report detailing how Alberta plans to withdraw from the Canada Pension Plan and set up an Alberta pension plan.

November 16: Opportunity Calgary Investment Fund invests up to \$5.5 million into the Calgary Entertainment Arts Production Hub at Bow Valley College. The hub is expected to train 675 people, support over 125 companies, and potentially create over 300 jobs.

November 22: City Council approves adjustments to The City of Calgary's service plans and budgets. Key investments are made to improve the housing crisis, safety, mental health and addiction strategy, and fire department emergency response.

*** Economic Perspectives Surveys Field Dates:**

- 2023 Wave 2: June 19 to 29
- 2023 Wave 3: September 20 to October 2
- 2023 Wave 4: November 20 to 28

Key findings

Perceptions of overall quality of life in Calgary have remained stable throughout 2023.

- About two-thirds (68%) of Calgarians rate their quality of life in Calgary as “good” (ratings of seven to ten on a ten-point scale), which is on par with the previous three quarters (69% for April, 71% for June, and 71% for September 2023).

Perceptions about the economy in Calgary have stabilized this quarter after several decreases last quarter.

- Similar to last quarter, a small majority (57%) of Calgarians describe the economic situation in Calgary and Alberta as “good” while less than one-half (42%) rate the economic situation in Canada as “good.”
- Just over one-half (56%) of Calgarians expect the economy in Calgary to be about the same six months from now while just over one-quarter (28%) expect the economy to be weaker in six months.

Expectations about Calgary’s unemployment rate six months from now have improved despite less Calgarians trusting The City of Calgary to make the right decisions to help the city through its economic recovery.

- Compared to last quarter, fewer Calgarians expect the unemployment rate in Calgary to get worse over the next six months (58% vs. 51% respectively).
- Only just over one-half (53%) of Calgarians trust The City of Calgary to make the right decisions to help their city through this economic recovery, which is down from 61% in September 2023.

Key findings

Most Calgarians continue to hold the opinion that it is a good time for The City to invest in new infrastructure projects, with projects that will create jobs and enhance economic diversity continuing to be considered a priority.

- About three-quarters (74%) of Calgarians believe it is a good time for The City to invest in new infrastructure projects, similar to September 2023 (77%).
- When assessing different infrastructure investments, Calgarians continue to prioritize projects that will create jobs (57%) and projects that will enhance economic diversity (52%). Projects that will have a positive social impact (46%) round out the top three.

Nearly all Calgarians experienced an increase in the costs of basic necessities over the past 12 months and three-quarters are concerned about their ability to afford basic necessities today as well as in six months from now.

- Nearly all (97%) Calgarians experienced an increase in the costs of basic necessities over the past 12 months with about three-quarters (74%) perceiving these costs to have increased a lot.
- Three-quarters (75%) of Calgarians are concerned about their ability to afford basic necessities today and a similar number (73%) are concerned about their ability to afford basic necessities six months from now.



Detailed findings

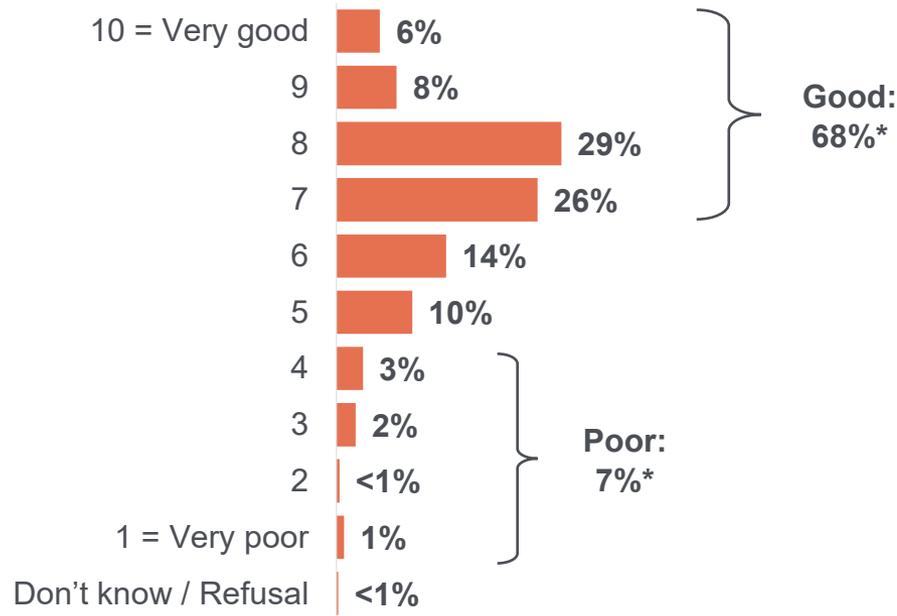
Quality of life



Overall quality of life in Calgary

About two-thirds (68%) of Calgarians rate their quality of life in Calgary as “good” while a minority (7%) rate it as “poor.”

Rating of quality of life in Calgary



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=506)

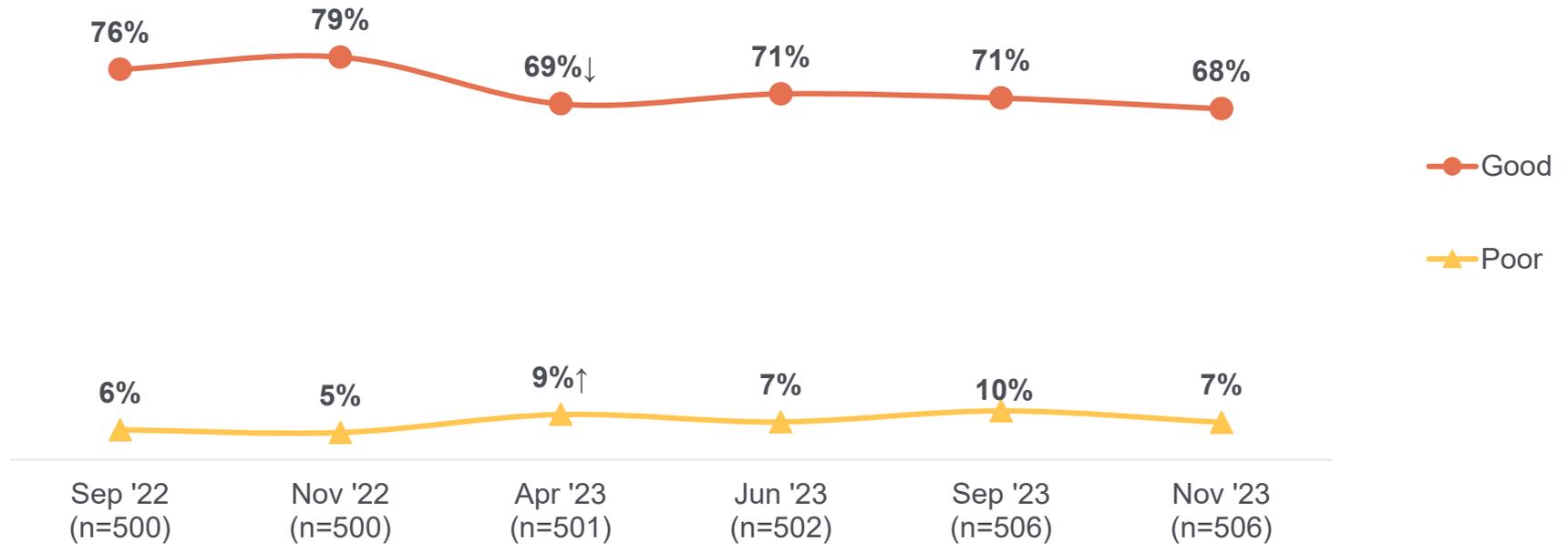
* Rounding



Tracking overall quality of life in Calgary

Quality of life ratings remain unchanged from last quarter.

Rating of quality of life in Calgary



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

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



Detailed findings

The economy and economic recovery



Current economic situation

A small majority (57%) of Calgarians describe the economic situation in Calgary and Alberta as “good.” In contrast, just over one-half (54%) of Calgarians rate the economic situation in Canada as “bad.”

Rating current economic situation



* Rounding

Data labels <4% not shown

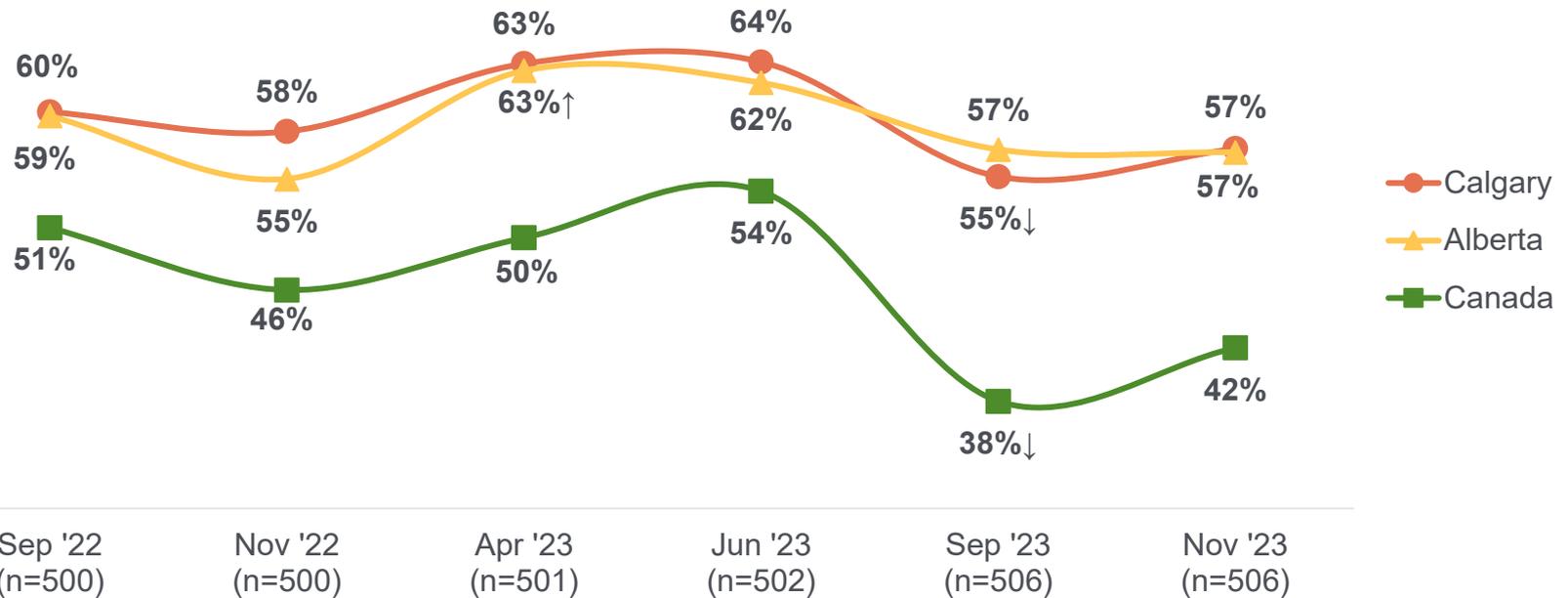
Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=506)



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” (42%) slightly increased compared to last quarter (38%), although not significantly.

Rating current economic situation ('good' ratings)



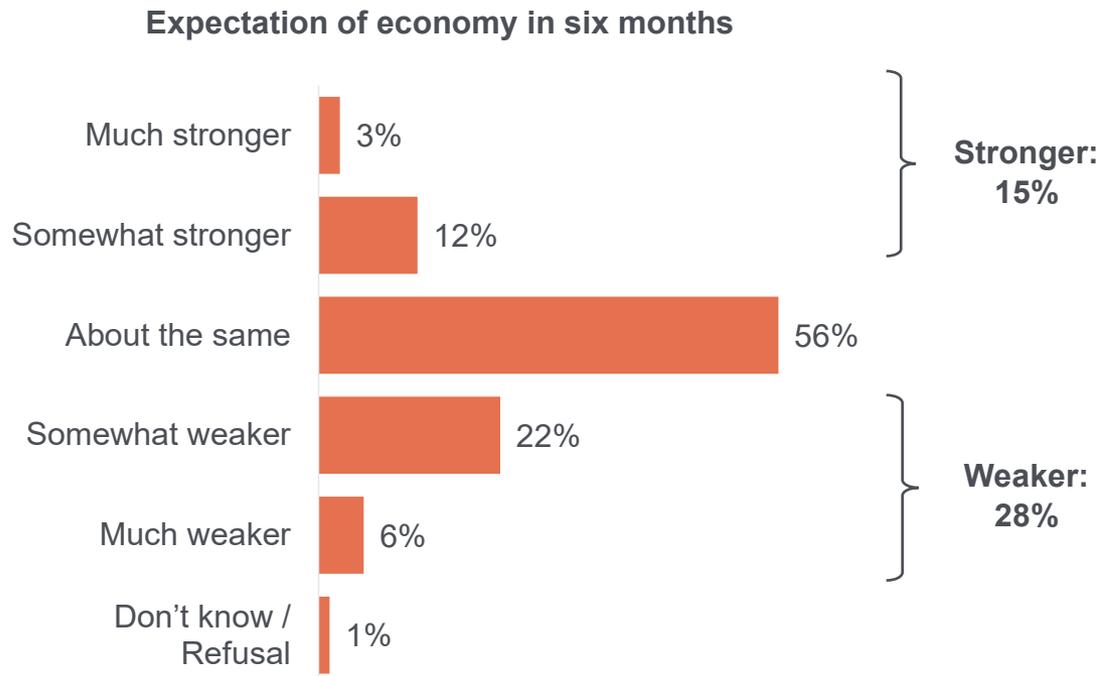
Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=506)

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



Future of the economy in Calgary

Just over one-half (56%) of Calgarians expect the economy in Calgary to be about the same six months from now while just over one-quarter (28%) expect the economy to be weaker in six months.

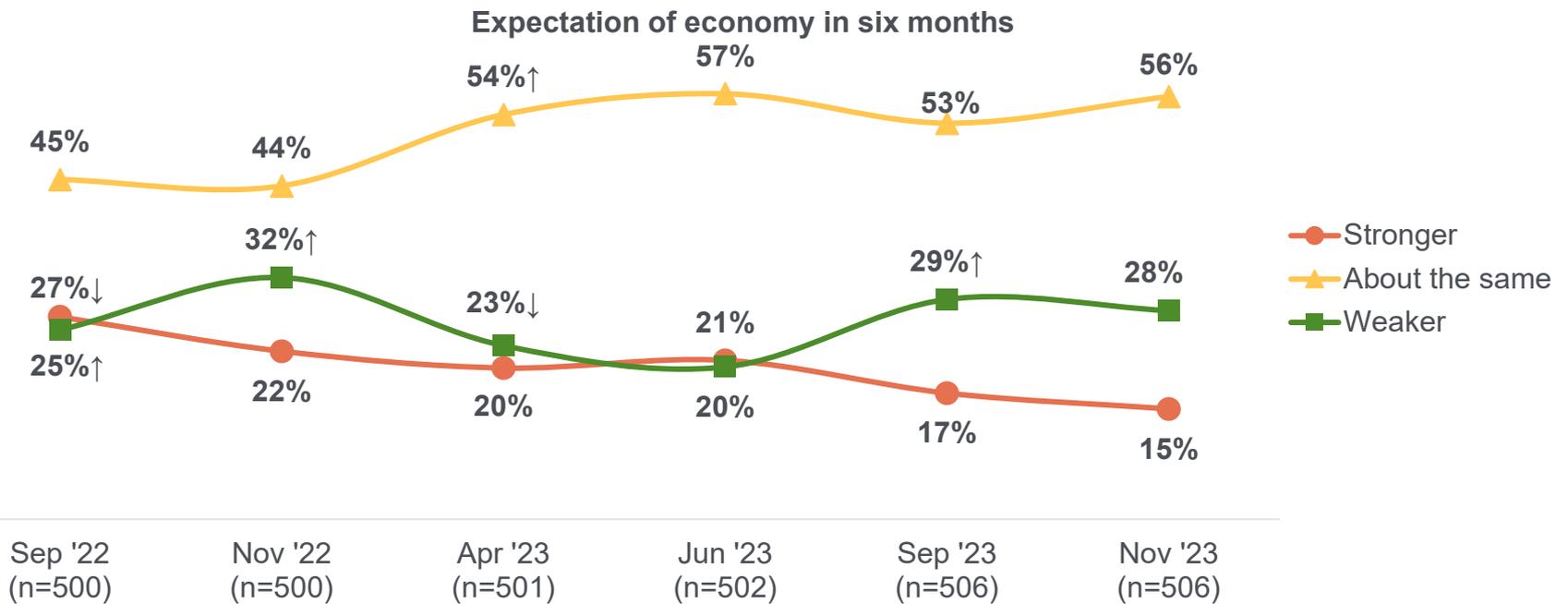


Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?
 Base: all respondents (n=506)



Tracking future of the economy in Calgary

Expectations about Calgary's economy six months from now have remained stable since last quarter.



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

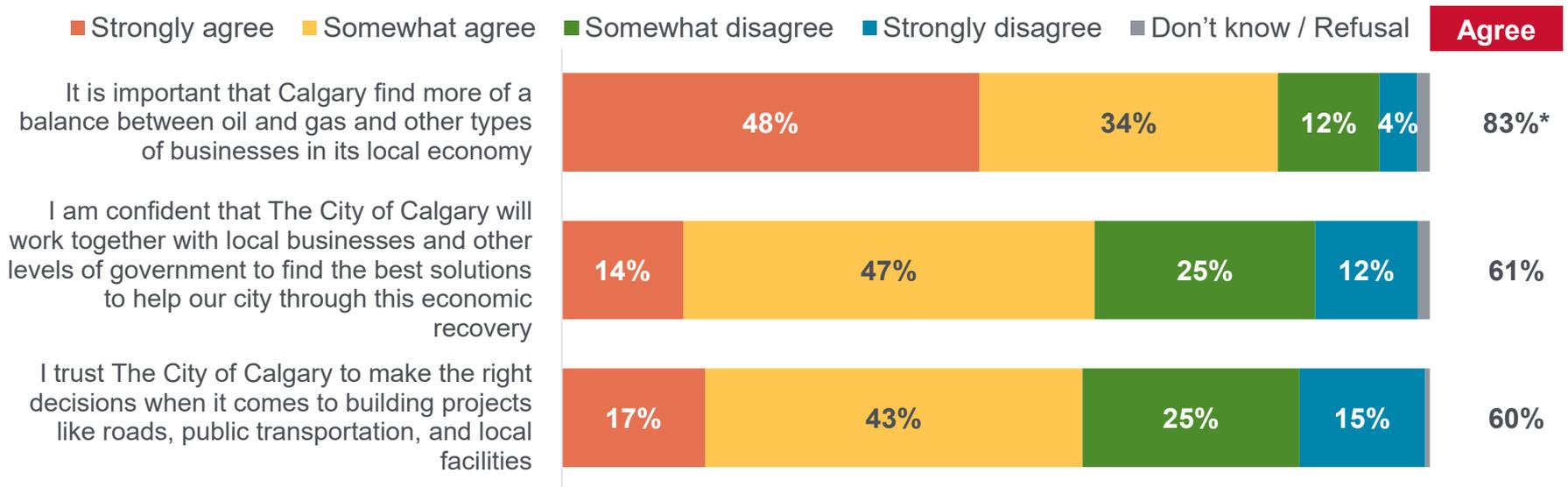
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



Perceptions of The City's role in the economic recovery and investments [1/2]

A large majority (83%) of Calgarians agree that it is important that Calgary finds more of a balance between oil and gas and other types of businesses in its local economy. Around three-in-five (61%) are confident that The City will work together with local businesses and other levels of government to find the best solutions to help the city through the economic recovery. A similar number (60%) trusts The City to make the right decisions in terms of building 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=506)

* Rounding

Data labels <4% not shown



Perceptions of The City's role in the economic recovery and investments [2/2]

Just over one-half (53%) of Calgarians express confidence in The City's ability to make sound decisions for guiding the city through its economic recovery and a similar number (51%) believes that the municipal government is actively implementing suitable measures to contribute to Calgary's economic recovery. A minority (36%) of Calgarians agree 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

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know / Refusal
 Agree

I trust The City of Calgary to make the right decisions to help our city through this economic recovery



The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery



The City of Calgary is making an effort to reduce the cost of local government



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=506)

* Rounding

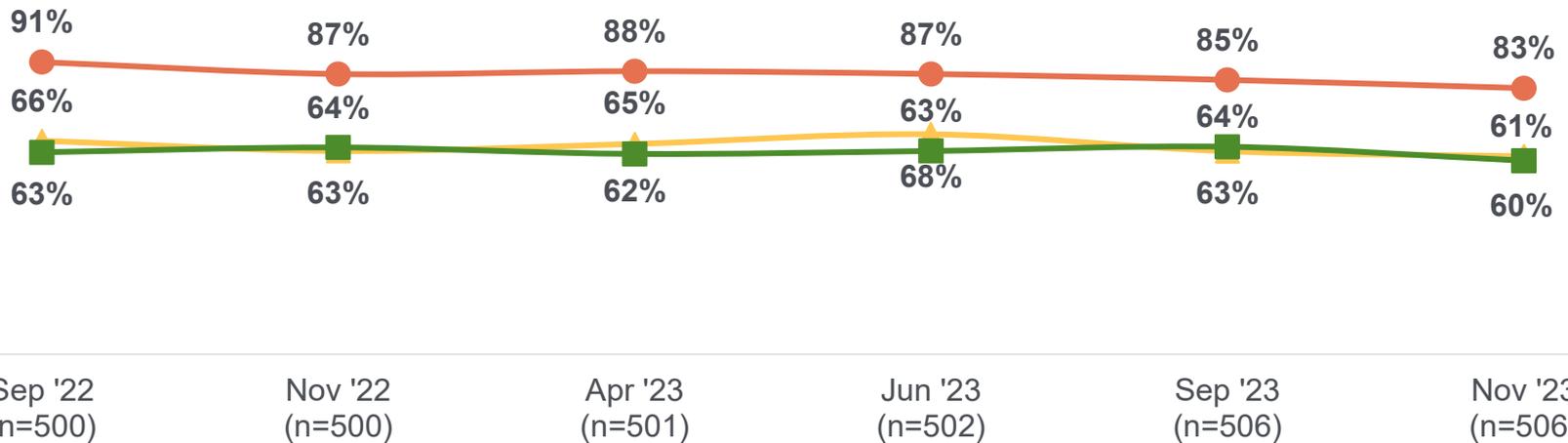
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Tracking perceptions of The City's role in the economic recovery and investments [1/2]

Calgarians' perspectives regarding The City's role in economic recovery have remained unchanged since last quarter. Achieving a better balance between the oil and gas sector and other diverse businesses in the local economy continues to be a priority for most (83%) Calgarians.

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



- It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy
- ▲ 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
- I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities

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

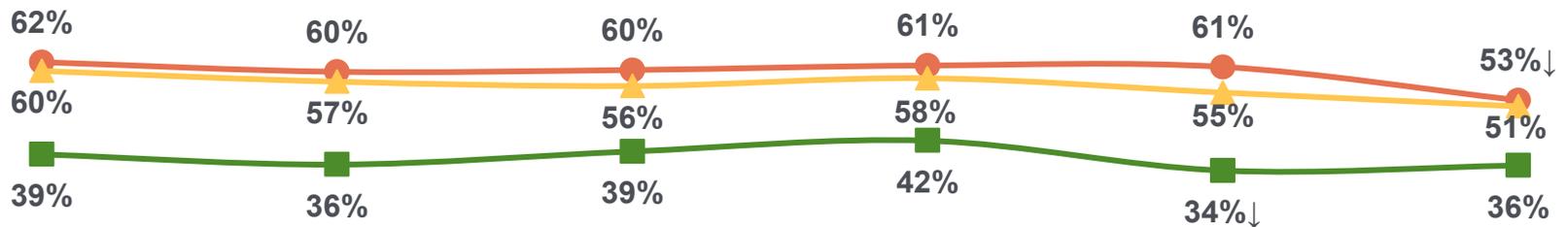
↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave



Tracking perceptions of The City's role in the economic recovery and investments [2/2]

Calgarians' trust in The City's ability to make the right decisions to help their city through this economic recovery has decreased substantially after a year of relatively stable perceptions, down to 53% from 61% last quarter. Perceptions of The City's ability to take appropriate measures to assist in the economic recovery and The City's efforts to reduce the cost of local government remain unchanged.

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



Sep '22 (n=500) Nov '22 (n=500) Apr '23 (n=501) Jun '23 (n=502) Sep '23 (n=506) Nov '23 (n=506)

- I trust The City of Calgary to make the right decisions to help our city through this economic recovery
- ▲ The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery
- The City of Calgary is making an effort to reduce the cost of local government

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

About three-quarters (73%) of Calgarians believe that now is a good time for companies to be investing in Calgary but only just over one-third (38%) believe that now is a good time to start a new business in Calgary.

About one-half of Calgarians (51%) anticipate the unemployment rate in Calgary to worsen in six months' time and a similar number (50%) agree that Calgary is attracting enough out-of-province investment to help the economy.

Agreement with perceptions of Calgary's economic recovery

Agree

Strongly agree Somewhat agree Somewhat disagree Strongly disagree Don't know / Refusal



* Rounding

Data labels <4% not shown

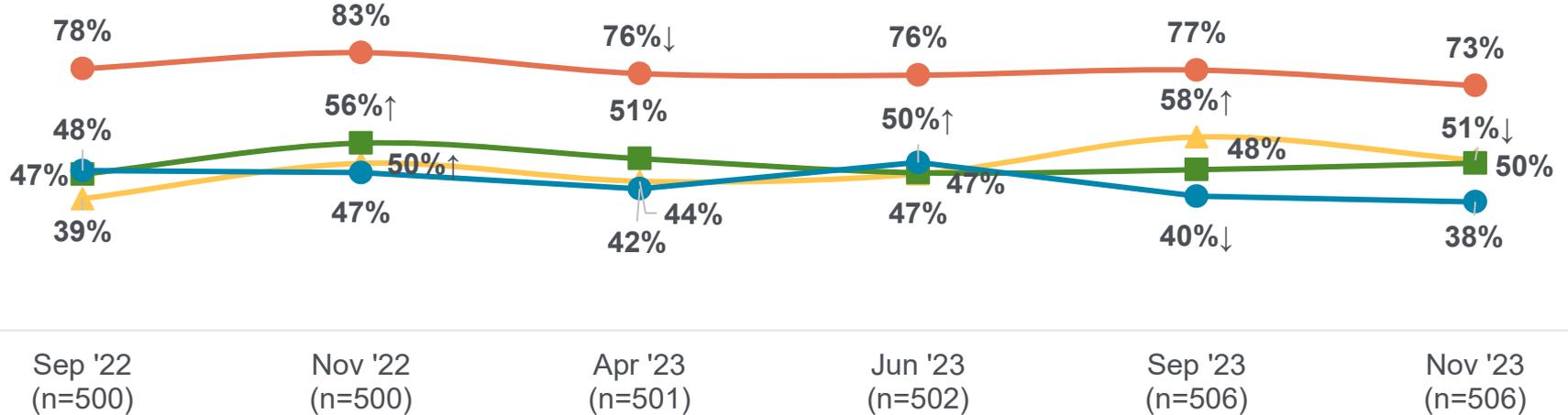
Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?
Base: all respondents (n=506)



Tracking perceptions of Calgary's economic recovery and investments

The proportion of Calgarians expecting Calgary's unemployment rate to get worse decreased from 58% in September 2023 to 51% this quarter. Calgarians perceptions on investment and starting new businesses in Calgary remain stable.

Agreement with perceptions of Calgary's economic recovery



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

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

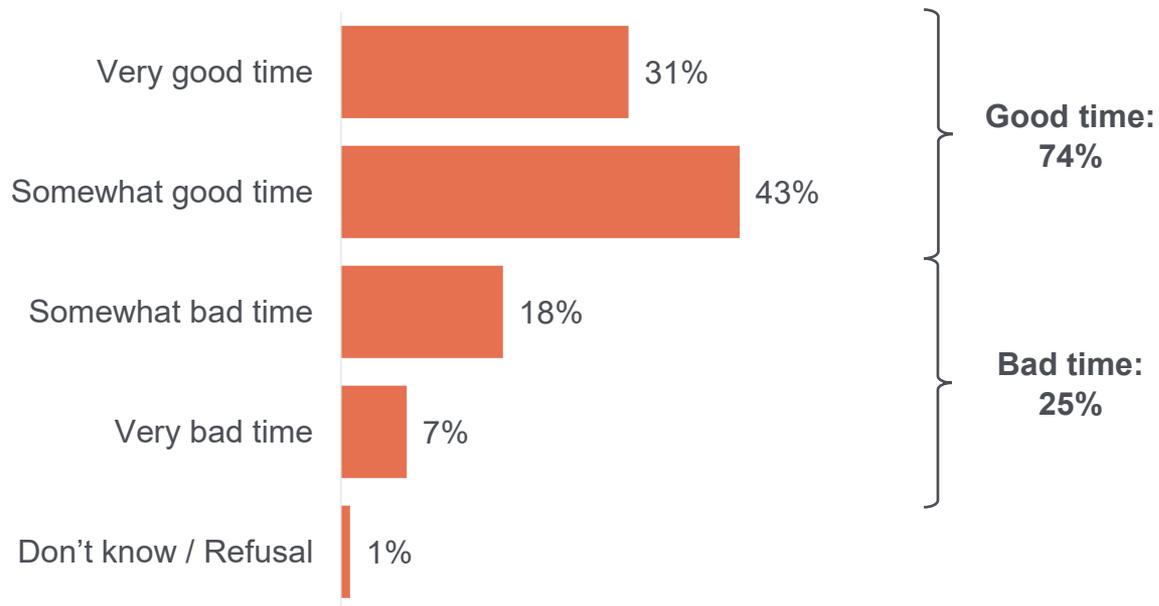
Infrastructure investment



Infrastructure investment

About three-quarters (74%) of Calgarians believe it is a good time for The City to invest in new projects like roads, public transportation, and local facilities.

Good or bad time for infrastructure investment



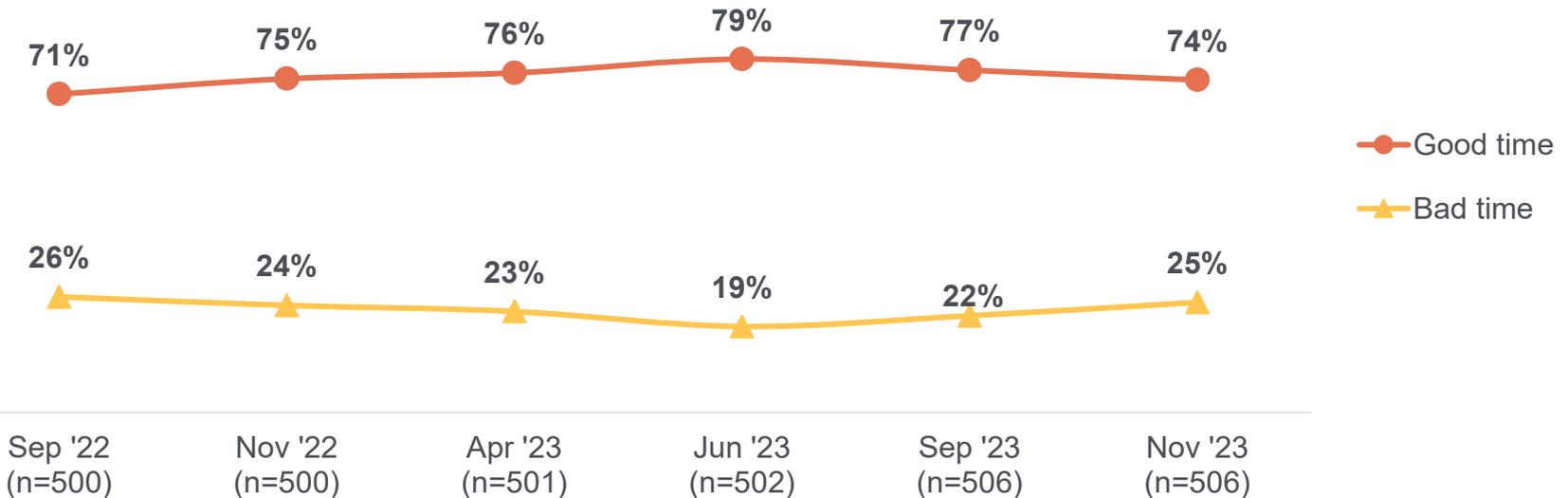
II1. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?
 Base: all respondents (n=506)



Tracking infrastructure investment

The proportion of Calgarians who believe it is a good time for The City of Calgary to invest in infrastructure has stayed consistent over the past year.

Good or bad time for infrastructure investment



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.

I12BOS1 - 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

I12BOS2 - 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

I12BOS3 - The next two are:

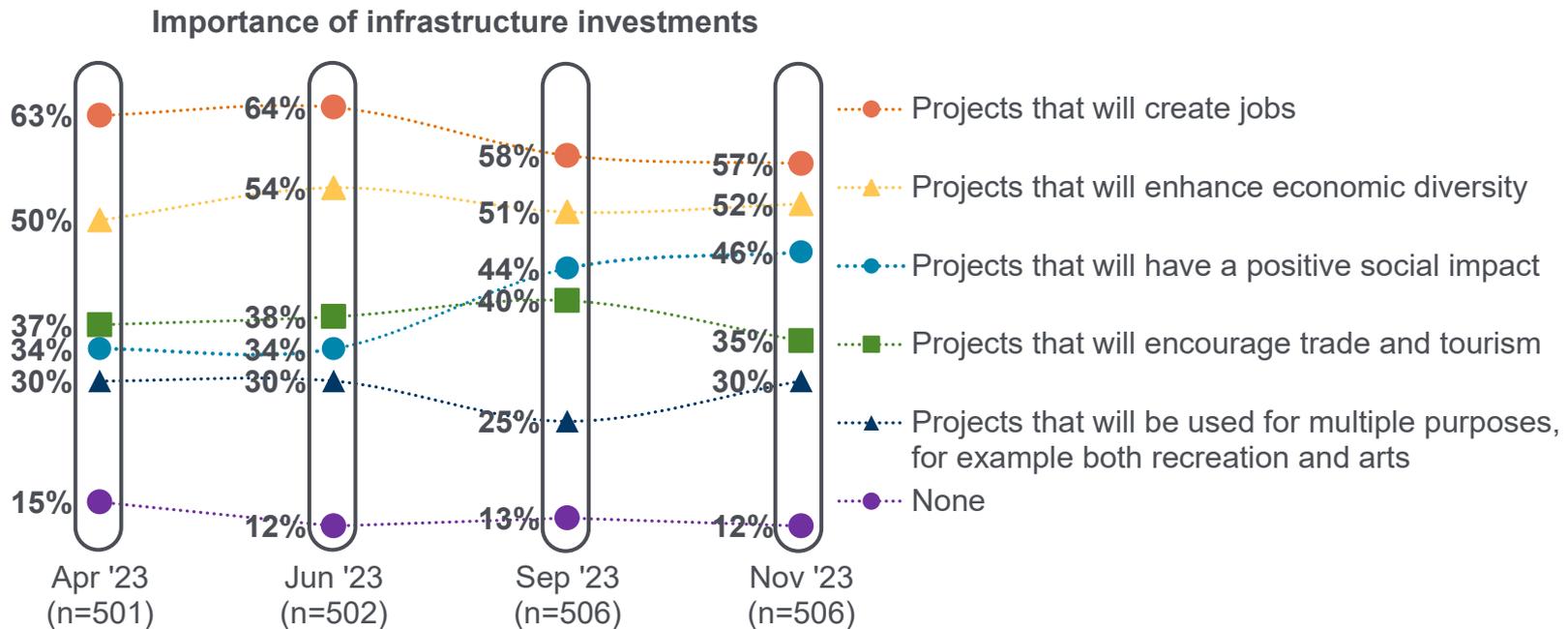
ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- 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

Consistent with previous quarters, Calgarians feel that infrastructure projects that will create jobs (57%) are most important. The gap between these projects and those that will enhance economic diversity (52%) continues to narrow. Projects that will have a positive social impact (46%) surpassed those that encourage trade and tourism (35%) in September 2023 and the difference continues to grow.



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 me 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



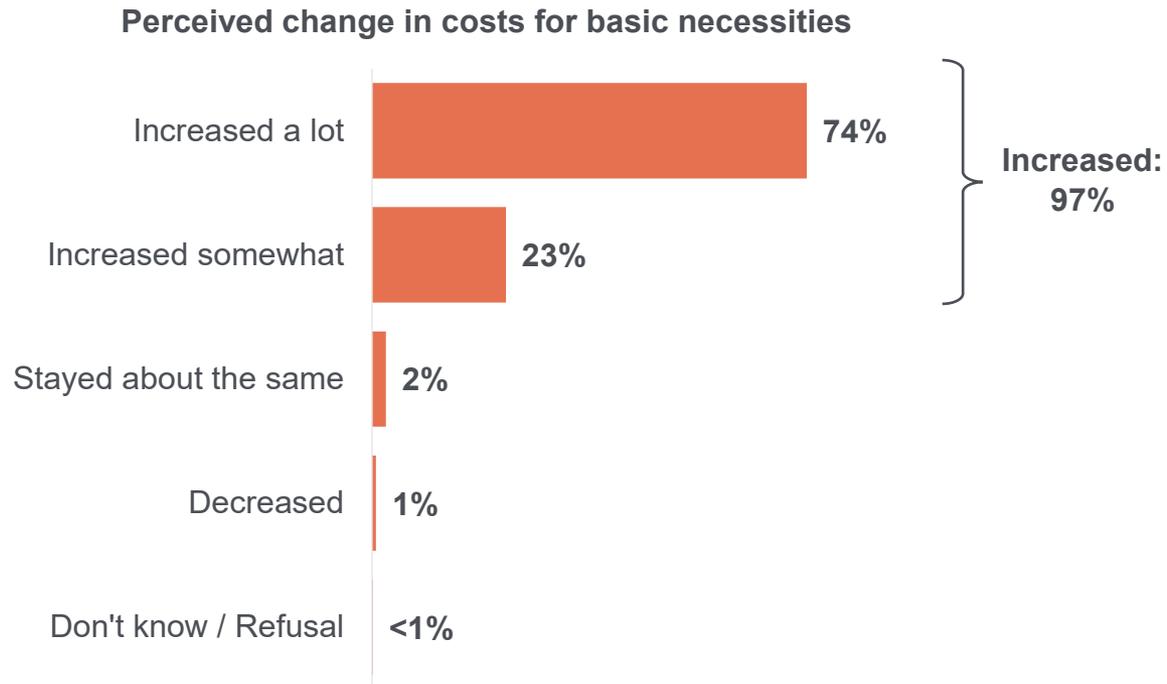
Detailed findings

Affordability of basic necessities



Perceptions of cost of living

Almost all (97%) Calgarians experienced an increase in the costs of basic necessities over the past 12 months with about three-quarters (74%) perceiving these costs to have increased a lot.



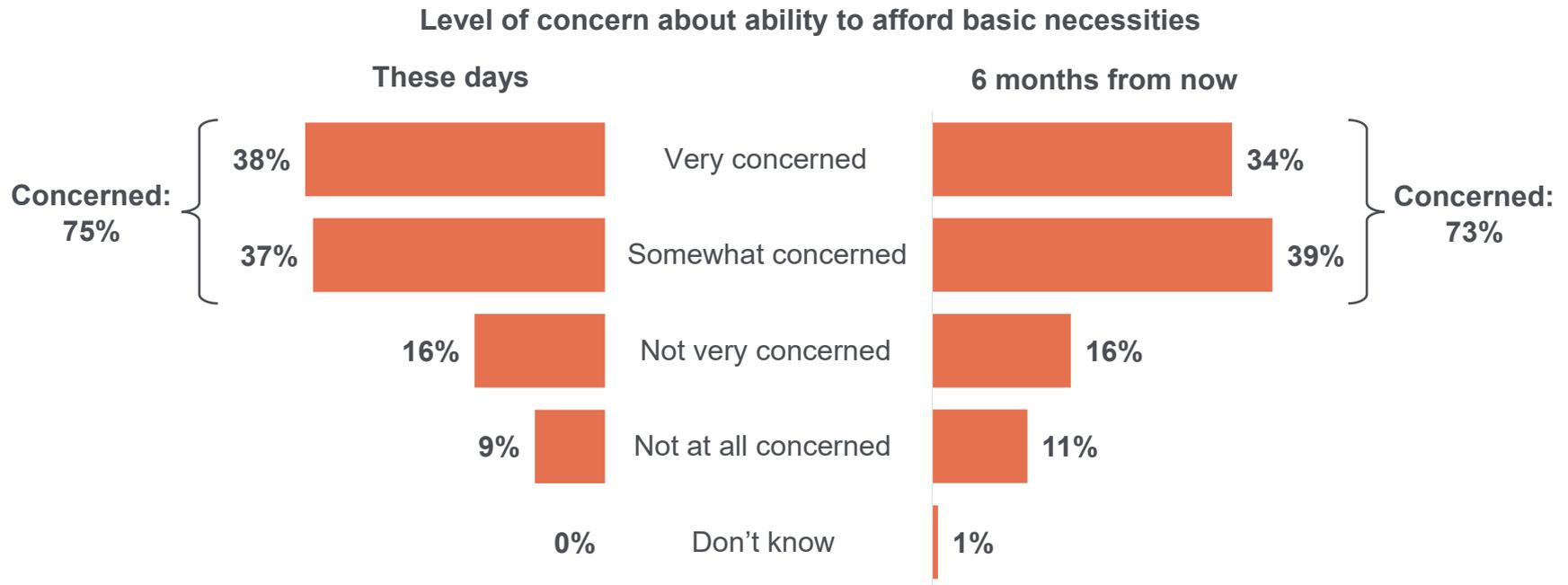
CL1. Over the past 12 months, have the costs for your basic necessities, such as your rent or mortgage, utilities, food, and clothing ...

Base: all respondents (n=506)



Concern about current and future cost of living

Three-quarters (75%) of Calgarians are concerned about their current ability to afford basic necessities and a similar proportion (73%) are concerned about their ability to afford basic necessities in the near future.



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=506)



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 may also be included.

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



Segment differences

- Male Calgarians are more optimistic than female Calgarians about the current economic situation in Alberta (63% vs. 52%) and have higher expectations that the economy will be stronger in six months (19% vs. 10%).
- Calgarians who live in the Northwest are more likely than other quadrants to describe the overall quality of life in Calgary to be ‘good’ (78%), while Calgarians who live in the Northeast are less likely than other quadrants to describe the overall quality of life in Calgary to be ‘good’ (56%).

	Gender		Age group			Quadrant			
	Female (n=232)	Male (n=265)	18-34 (n=82)	35-54 (n=178)	55+ (n=246)	S.W. (n=152)	S.E. (n=126)	N.W. (n=145)	N.E. (n=83)
Overall quality of life in Calgary (% good)	67%	71%	68%	66%	72%	67%	70%	78% ↑	56% ↓
Current economic situation: Calgary (% good)	53%	62%	51%	62%	57%	57%	57%	58%	56%
Current economic situation: Alberta (% good)	52% ↓	63% ↑	50%	59%	60%	58%	53%	60%	55%
Current economic situation: Canada (% good)	45%	40%	35%	46%	44%	48%	39%	40%	40%
Expectation of economy in six months (% stronger)	10% ↓	19% ↑	15%	15%	14%	14%	18%	15%	10%
Good or bad time for infrastructure investments (% good time)	73%	75%	79%	72%	73%	75%	78%	70%	75%

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

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



Segment differences

- Higher-income Calgarians are more positive about the overall quality of life in Calgary (78%) and the economic situation in Alberta (65%).
- In contrast, lower-income Calgarians are less optimistic about the quality of life in Calgary (55%).

	Children in HH		BIPOC		Household income		
	Yes	No	Yes	No	<\$90k	\$90k- <\$150k	\$150k+
	(n=159)	(n=344)	(n=127)	(n=362)	(n=152)	(n=115)	(n=171)
Overall quality of life in Calgary (% good)	67%	69%	63%	71%	55% ↓	72%	78% ↑
Current economic situation: Calgary (% good)	61%	55%	58%	56%	51%	57%	64%
Current economic situation: Alberta (% good)	58%	56%	55%	57%	50%	53%	65% ↑
Current economic situation: Canada (% good)	45%	41%	46%	40%	41%	40%	45%
Expectation of economy in six months(% stronger)	14%	15%	19%	13%	13%	21%	13%
Good or bad time for infrastructure investments (% good time)	74%	75%	76%	73%	71%	74%	75%

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)).

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



Respondent profile



Respondent profile

Gender	Weighted %	Unweighted %
Female	50%	46%
Male	48%	52%
Prefer to self-describe	1%	1%
Prefer not to answer	1%	1%

Quadrant	Weighted %	Unweighted %
Southwest	28%	30%
Southeast	24%	25%
Northwest	28%	29%
Northeast	20%	16%

Age	Weighted %	Unweighted %
18-24	9%	5%
25-34	21%	11%
35-44	18%	16%
45-54	20%	19%
55-64	13%	20%
65-74	12%	18%
75+	7%	11%

People in household	Weighted %	Unweighted %
1	13%	
2	32%	
3	15%	
4 or more	40%	
Prefer not to answer	<1%	

Children in household	Weighted %	Unweighted %
Yes	37%	
No	63%	
Prefer not to answer	<1%	

Senior in household	Weighted %	Unweighted %
Yes	30%	
No	70%	
Prefer not to answer	0%	

Tenure in Calgary	Weighted %	Unweighted %
Less than 10	14%	
10-20	26%	
21-30	22%	
31-40	17%	
Over 40	21%	
Prefer not to answer	1%	

Disability in household	Weighted %	Unweighted %
Yes - myself	9%	
Yes - someone in my household	11%	
No	81%	
Prefer not to answer	<1%	

Identify as 2SLGBTQ+	Weighted %	Unweighted %
Yes	7%	
No	92%	
Prefer not to answer	1%	

Base: all respondents (n=506)



Respondent profile

Employment status	
Employed full-time	62%
Employed part-time	11%
Retired	19%
Student	4%
Looking after home and/or family	3%
Unemployed	3%
Unable to work	2%
Doing unpaid or voluntary work	1%
Other	<1%
Prefer not to answer	<1%

Business owner	
Yes	23%
No	77%
Prefer not to answer	0%

Annual household income	
Less than \$90,000	29%
\$90,000 to just under \$150,000	25%
\$150,000 and over	33%
Don't Know	2%
Prefer not to answer	10%

Racialized	
Yes	25%
No	72%
Prefer to self-describe	1%
Prefer not to answer	2%

Identify as Indigenous	
Yes - First Nations	2%
Yes - Métis	3%
Yes - Inuit	<1%
Yes - Prefer to self-describe	0%
No	94%
Prefer not to answer	1%

Education	
Completed high school or less	16%
Some post secondary or completed a college diploma	27%
Completed university degree	57%
Prefer not to answer	<1%

Base: all respondents (n=506)

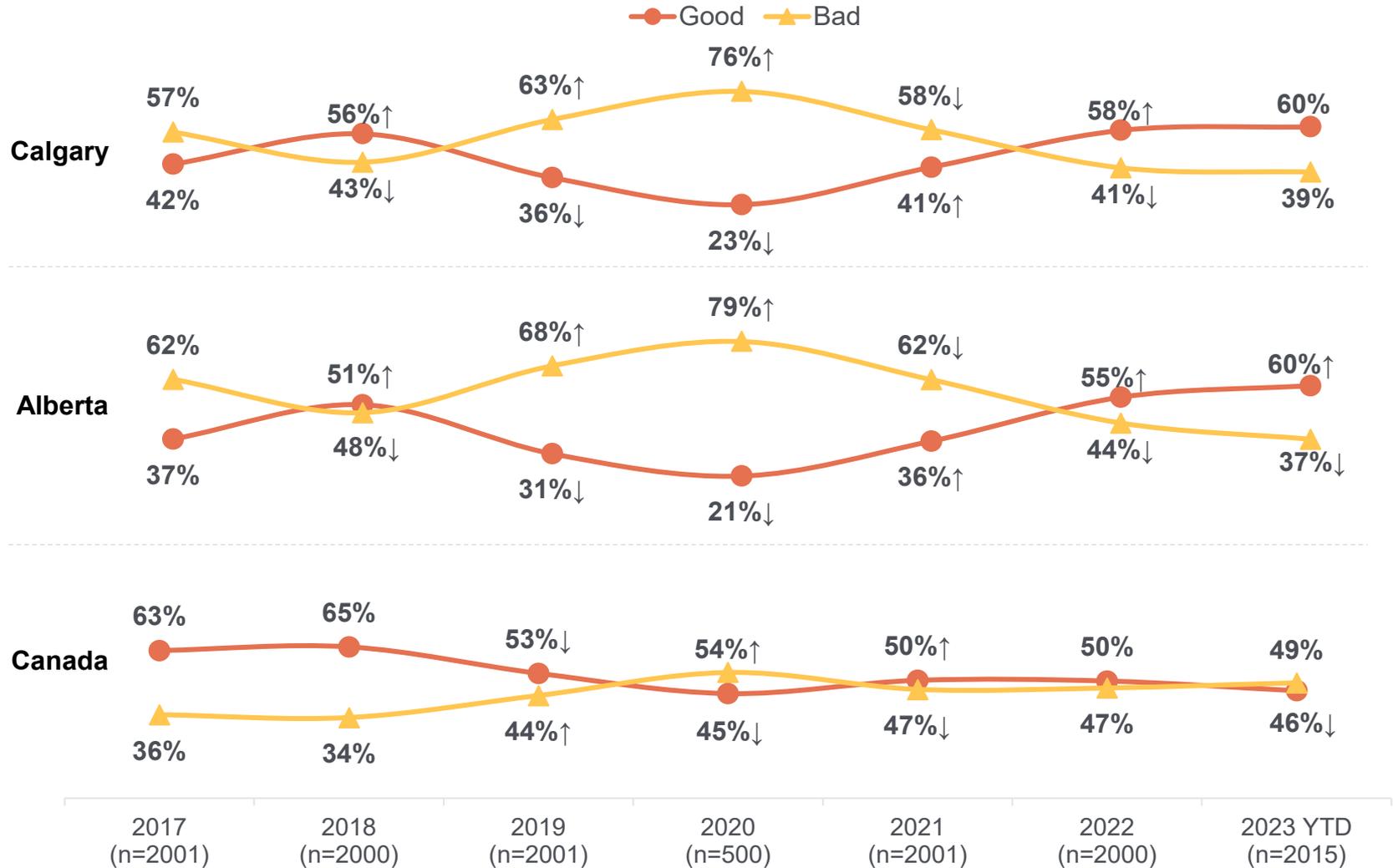


Appendix

Tracking



Tracking current economic situation



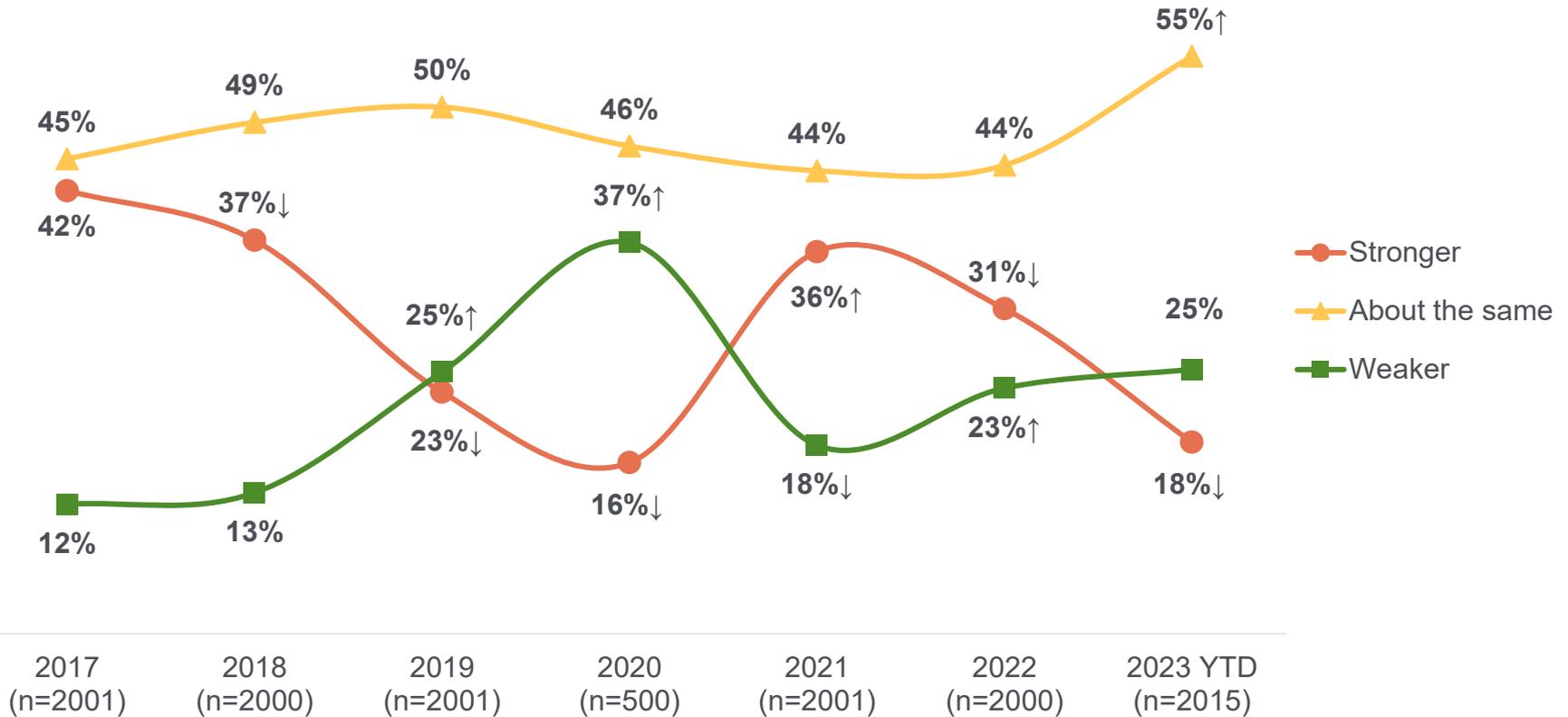
Q6. How would you describe the current economic situation in...?
Base: all respondents

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



Tracking Future Economy in Calgary

Expectation of economy in six months



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

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



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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 (n=2015)
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%↓
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%
I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities		Added in April 2021			67%	63%↓	62%
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%
The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery		Added in April 2021			61%	58%	55%
The City of Calgary is making an effort to reduce the cost of local government		Added in April 2021			41%	39%	38%

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 year
↓ Statistically lower than the previous year

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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 (n=2015)
Now is a good time for companies to be investing in Calgary	77%	73%↓	68%↓	62%↓	74%↑	81%↑	76%↓
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%↑
Calgary as a city is attracting enough investment from outside of the province to help our economy	Added in April 2021				37%	47%↑	49%
Now is a good time to start a new business in Calgary	43%	44%	33%↓	31%	39%↑	49%↑	43%↓

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 year
↓ Statistically lower than the previous year



Questionnaire



Economic Perspectives Survey: 2023 Q4



City of Calgary

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 "2023 Economic Perspectives Survey." City Staff would be happy to address your concerns.

IF ASKED: The survey will take approximately 15 minutes.

- 1 Yes
- 2 Yes, 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 "2022 Citizen 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

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

Unfortunately, we need to speak with individuals 19 or older. Thank you for your time. Good-bye.

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

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

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.

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, Section 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 "2023 Economic Perspectives Survey". What contact information would you prefer?

If phone: 403-268-6732

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

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



Questionnaire

T5 Show if QS4 ref (QS4 = 9)

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

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.

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.

MAIN SURVEY

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



Questionnaire

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

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
- 9 [DO NOT READ] Don't know
- 10 [DO NOT READ] Prefer not to answer

PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

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?

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



Questionnaire

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 type of projects you think is most important.

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

Items to show:

- Projects that will be used for multiple purposes, for example both recreation and arts
- Projects that will create jobs
- Projects that will enhance economic diversity
- Projects that will have a positive social impact
- Projects that will encourage trade and tourism

- 1 [ITEM 1]
- 2 Or [ITEM 2]
- 3 [DO NOT READ] Neither
- 4 [DO NOT READ] Don't know
- 5 [DO NOT READ] Prefer not to answer

II2BOS2

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

- 1 [ITEM 1]
- 2 Or [ITEM 2]
- 3 [DO NOT READ] Neither
- 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 [ITEM 1]
- 2 Or [ITEM 2]
- 3 [DO NOT READ] Neither
- 4 [DO NOT READ] Don't know
- 5 [DO NOT READ] Prefer not to answer

II2BOS4

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 [DO NOT READ] Neither
- 4 [DO NOT READ] Don't know
- 5 [DO NOT READ] Prefer not to answer

II2BOS5

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 [DO NOT READ] Neither
- 4 [DO NOT READ] Don't know
- 5 [DO NOT READ] Prefer not to answer

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



Questionnaire

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

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

0 Prefer not to answer

QD2

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

Minimum: 1, Maximum: 50

_____ people

0 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



Questionnaire

QD5

Do you own or rent your current place of residence?

- 1 Own
- 2 Rent
- 3 [DO NOT READ] Neither
- 4 [DO NOT READ] Other (please specify) _____
- 99 [DO NOT READ] Prefer not to answer

QD5A

Are you either primarily or jointly responsible for paying property taxes or rent in your household?

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

QD5B

Which of the following best describes the type of home you live in?

READ LIST

- 1 Single detached house [DO NOT READ: This includes bungalow, split level, 2-story, suite in a house, etc.]
- 2 Duplex, triplex or fourplex
- 3 Townhouse or rowhouse
- 4 Apartment or apartment-style condominium
- 5 Another type of multi-unit complex [DO NOT READ: This includes mobile home park, trailer park, seniors home, etc.]
- 98 [DO NOT READ] Don't know
- 99 [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

- .0 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)*

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



Questionnaire

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

What is your gender?

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 Male
- 2 Female
- 95 Prefer to self-describe (specify:)
- 99 [DO NOT READ] Prefer not to answer

QD12

We want to make sure our research is reflective of all Calgarians. Were you born in Canada?

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

QD13 Show if Not born in Canada (QD12 = 2)

How old were you when you left the country where you were born? Were you ...

READ LIST

- 1 Under the age of 18
- 2 18 to 49
- 3 50 or older
- 9 [DO NOT READ] Prefer not to answer

QD14 Show if Not born in Canada (QD12 = 2)

And did you arrive in Canada within the past five years or more than five years ago?

- 1 Within the past five years
- 2 More than five years ago
- 9 [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)



Questionnaire

QD16 *Show if Not Indigenous (QD15_5 = 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
- 95 Prefer to self-describe (specify) _____
- 99 [DO NOT READ] Prefer not to answer

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

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.

- 0 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?

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

First name: _____

Last name: _____

Telephone number: _____

- 0 Prefer not to answer

End

end1

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



Contact

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