



Calgary



Economic Perspectives Research Wave 3 Final Report

September 2022

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Leger

THE RESEARCH INTELLIGENCE GROUP



Economic Perspectives Survey: Wave 3 Highlights at a Glance

QUALITY OF LIFE & ECONOMY



76%

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



60%

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



27%

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

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



48%

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



47%

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



39%

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

TAXES AND USER FEES



55%

Aware that The City collects provincial property tax on behalf of the Province



32%

Are aware forty per cent of taxes collected by The City are transferred to the Province

TRUST & SATISFACTION WITH THE CITY



42%

Say they **trust** The City



65%

Satisfied with the performance of Calgary's **City Administration** EXCLUDING Council



57%

Satisfied with the performance of City Administration and Council as a whole



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Data Collection

- Telephone interviews were conducted with a randomly selected sample of n=500 Calgarians between August 29th and September 7th, 2022.
- Interviews were conducted using 26% landline sample and 74% cell phone sample.
- Average length of the interview was 17 minutes.

Target Audience

- Residents of Calgary, 18 years of age or older.

Analysis

- Data were weighted by age, gender, and quadrant based on the latest City census.
- The margin of error for the study is $\pm 4.4\%$, 19 times out of 20.
- Tracking data are shown where possible and are sourced from previous reports (supplied by The City of Calgary).
- Throughout the report, \downarrow denotes a significant decrease from previous wave and \uparrow denotes a significant increase from the previous wave, unless otherwise specified.

Appendices

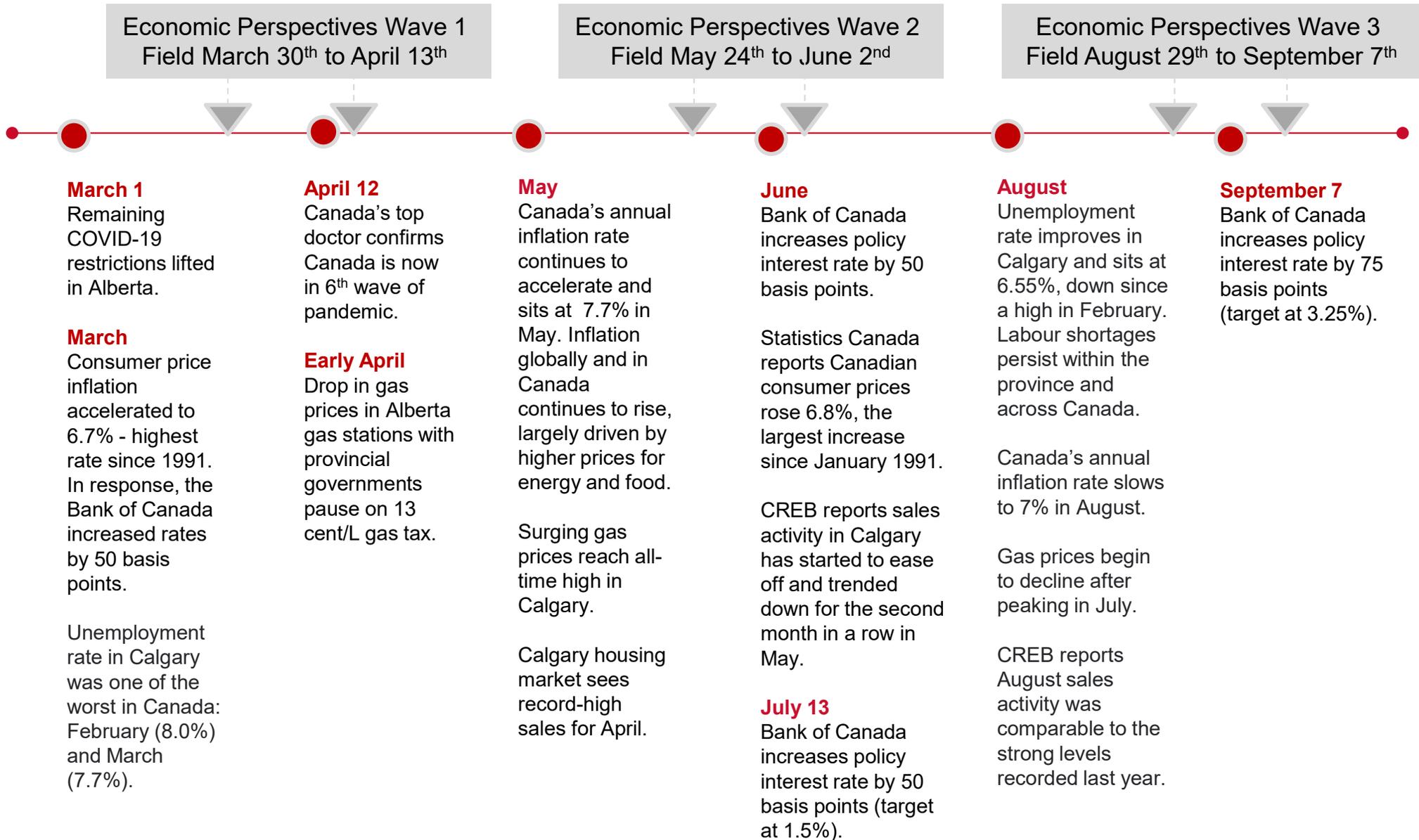
- The Economic Perspectives Research has been conducted quarterly for many years. Throughout the report, the last six quarters are presented. However, all available quarterly tracking data is included in the appendices.

Survey Context





Survey Context: September 2022





Summary of Findings





Summary of Findings: Quality of Life and the Economy

Calgarians continue to report a high quality of life, which has remained consistent since July 2021.

- Three-quarters (76%) rate their perception of their quality of life in Calgary as “good” while a minority (6%) of Calgarians disagree, rating it as “poor.”
- These ratings have remained consistent since July 2021.

Calgarians continue to have positive perceptions of the economy in Calgary and Alberta after perceptions improved in May 2022. However, they are less optimistic about the future of Calgary’s economy in September 2022.

- Three-in-five Calgarians describe the current economic situation in Calgary and Alberta as “good” (60% and 59%, respectively).
- The proportion of those who expect Calgary’s economy to be stronger in the next six months has declined from 35% in May 2022 to 27% in September 2022, while the proportion of those who expect the economy to be weaker has increased from 19% in May 2022 to 25% in September 2022.
- Economic perceptions of Canada overall have varied slightly over the past couple of years but remain consistent over the past year.



Summary of Findings: Economy and Role of the Government

Agreement that Calgary is “attracting enough out-of-province investment to help the economy” has been steadily increasing since October 2021, however, trust that The City will make the right decisions for economic recovery has trended downwards.

- Almost one-half (47%) of Calgarians agree that Calgary is “attracting enough out-of-province investment to help the economy” which has been trending upwards since October 2021 (35%).
- The proportion who agree they trust The City to “make the right decisions to help our city through this economic recovery” has declined from 69% in July 2021 and now sits at 62% in September 2022.
- Almost all Calgarians (91%) continue to 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.”

Calgarians continue to have a strong interest in infrastructure investment, specifically as it relates to projects that will create jobs, enhance economic diversity, and encourage trade and tourism.

- Seven-in-ten (71%) Calgarians believe it is a “good time” for The City to invest in new infrastructure projects.
- Nearly all Calgarians feel it is important to invest in infrastructure projects that will create jobs (96%), enhance economic diversity (92%) and encourage trade and tourism (92%).



Summary of Findings: Trust and Satisfaction with The City

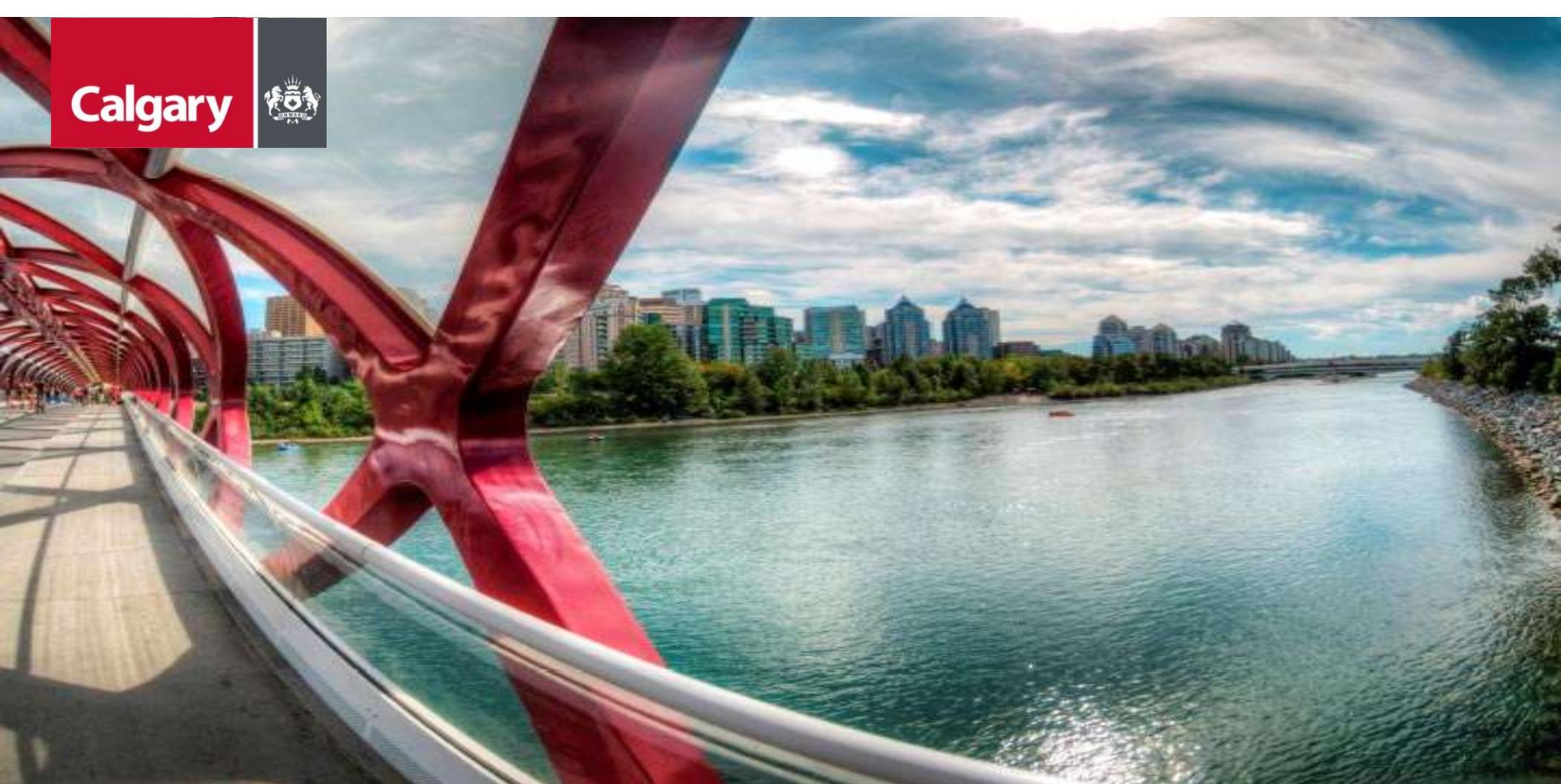
There are signs of declines in levels of satisfaction and trust in The City based on the past five waves of tracking.

- Satisfaction with The City of Calgary as a whole has trended downwards from July 2021 (65%) and is now significantly lower at 57%.
- Satisfaction with Calgary's City Administration is directionally lower in September 2022 (65%) compared to July 2021 (70%), indicating a potential downward trend.
- Satisfaction with Calgary's City Council has been consistent over the past five waves of tracking.
- The level of trust (42%) in The City in September 2022 has remained stable since May 2022.



Detailed Results





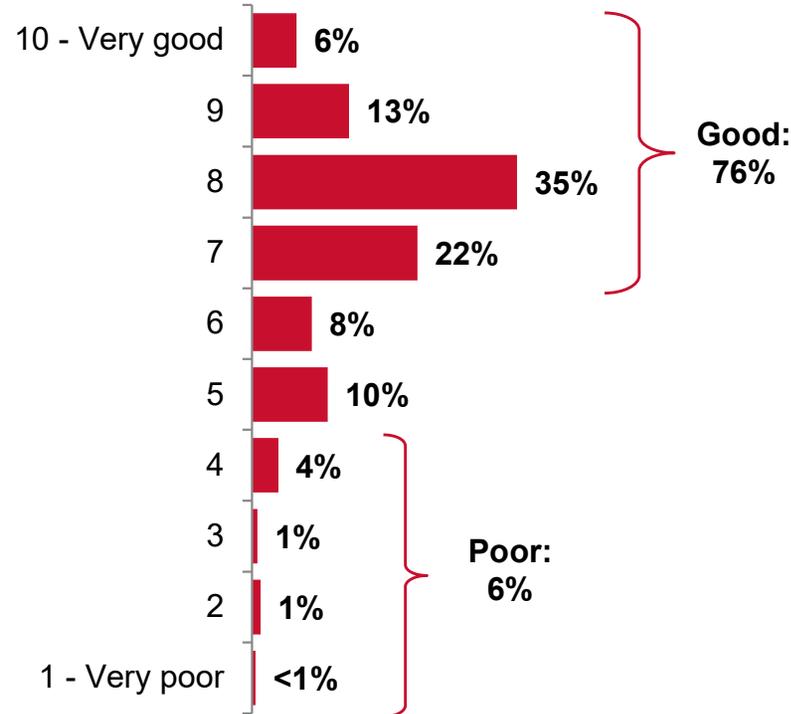
Quality of Life



Overall Quality of Life in Calgary

Three-quarters (76%) rate their quality of life in Calgary as “good” while a minority (6%) of Calgarians disagree, rating it as “poor.” Households with higher income (\$120,000+) are more likely to report a “good” quality of life in Calgary (82%) than households with an income of under \$60,000 (64%). Residents of the Southwest are more likely to report a “good” quality of life in Calgary (83%) compared to those in the Southeast (72%) and Northeast (68%).

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 the city of Calgary today?

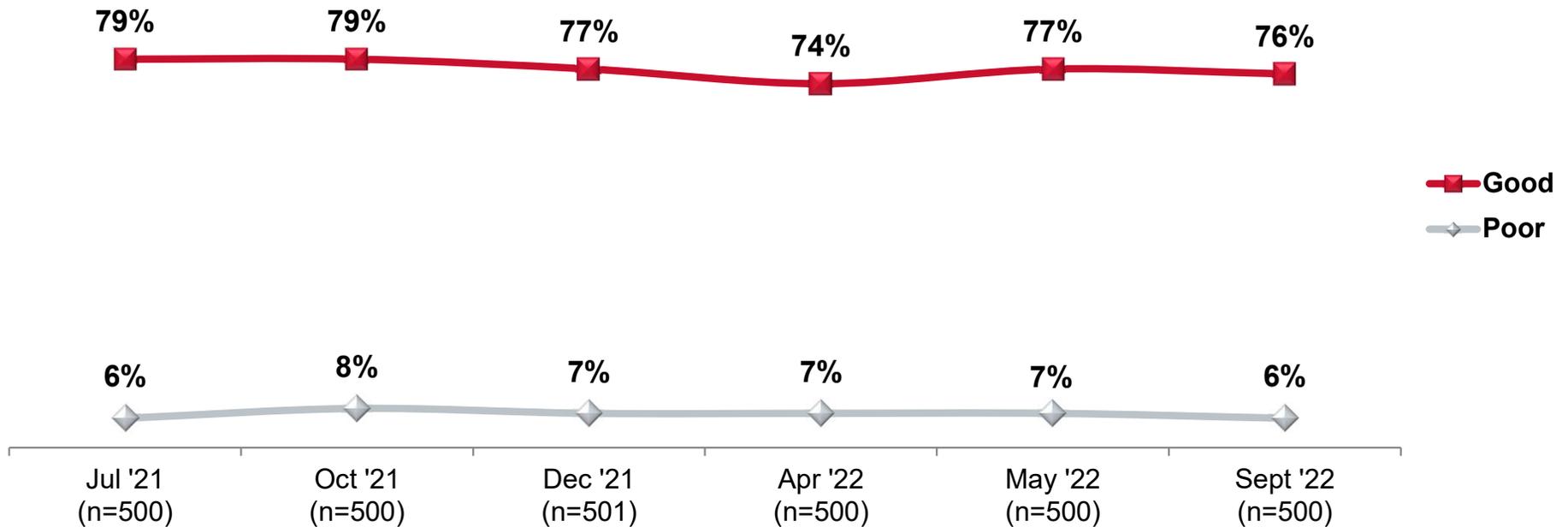
Base: all respondents (n=500)



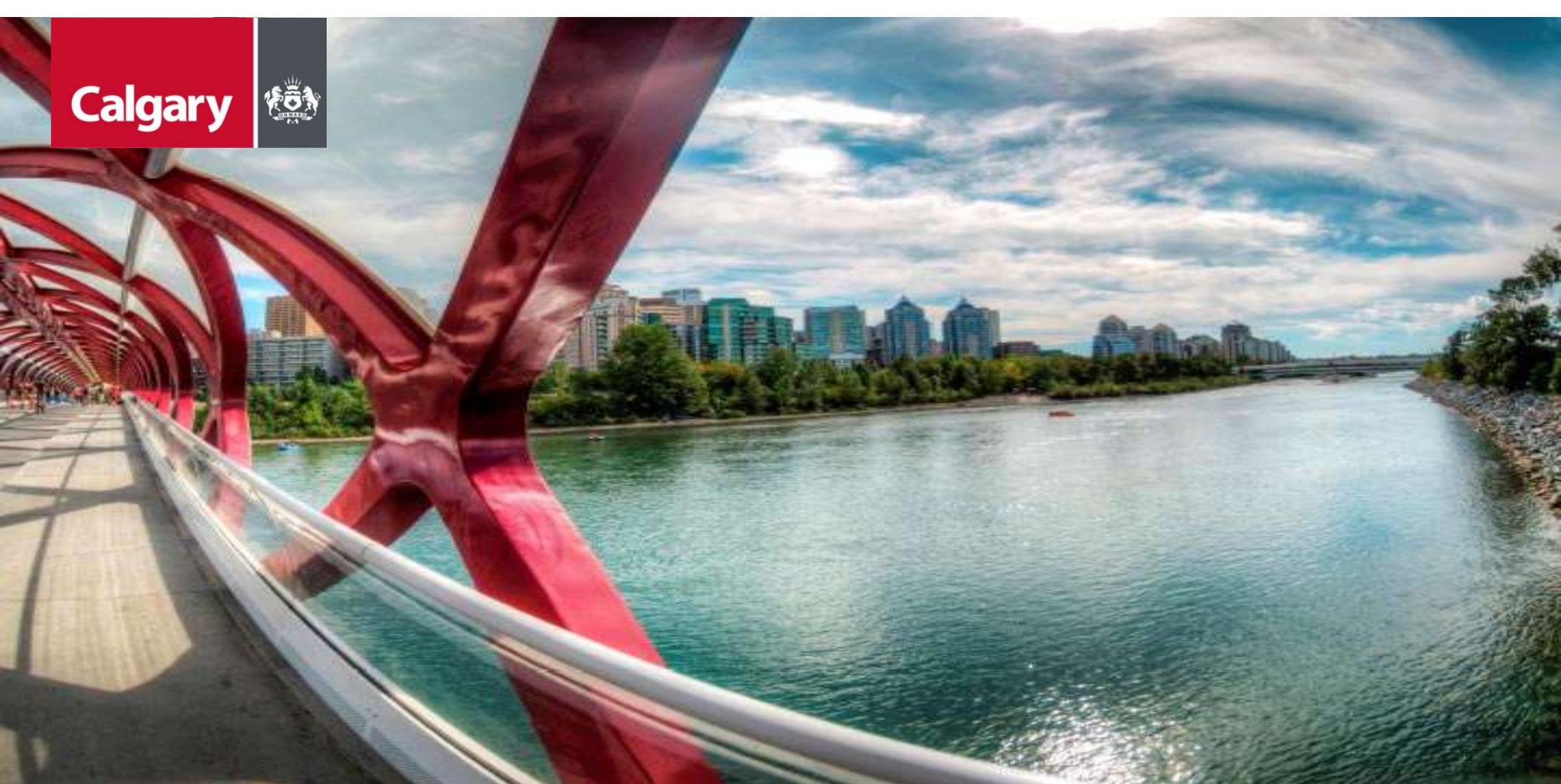
Tracking Overall Quality of Life in Calgary

Calgarians have consistently reported positive quality of life ratings since July 2021.

Ratings 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=500)



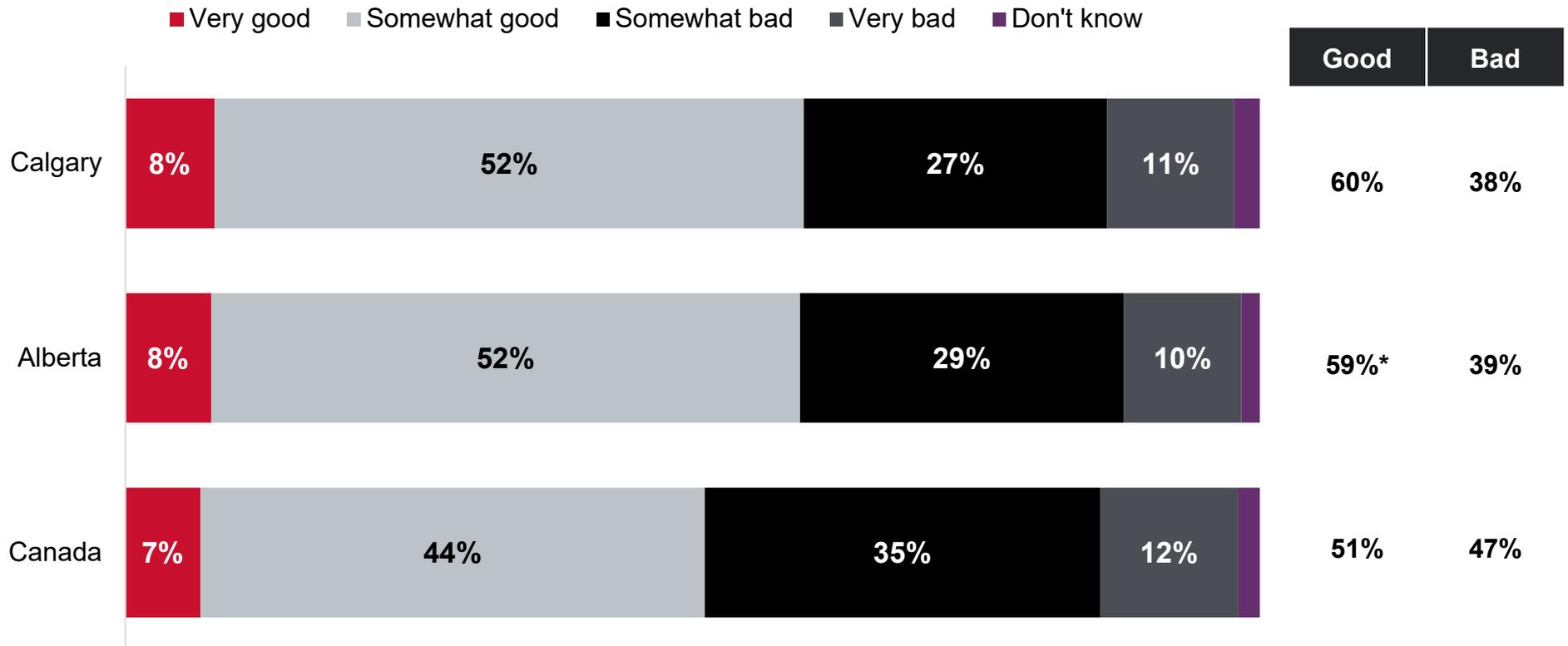
The Economy and Economic Recovery



Current Economic Situation

Three-in-five Calgarians describe the current economic situation in Calgary and Alberta as “good” (60% and 59%, respectively). One-half of Calgarians (51%) rate the economic situation in Canada as “good.” Calgarians who have lived in Calgary for less than 10 years were more likely to describe Calgary’s (73%) and Alberta’s (76%) economic situation as “good” compared to those who have lived in Calgary for over 20 years (57% for Calgary and 56% for Alberta).

Rating Current Economic Situation



* Indicates rounding

Note: 3% and lower not labelled

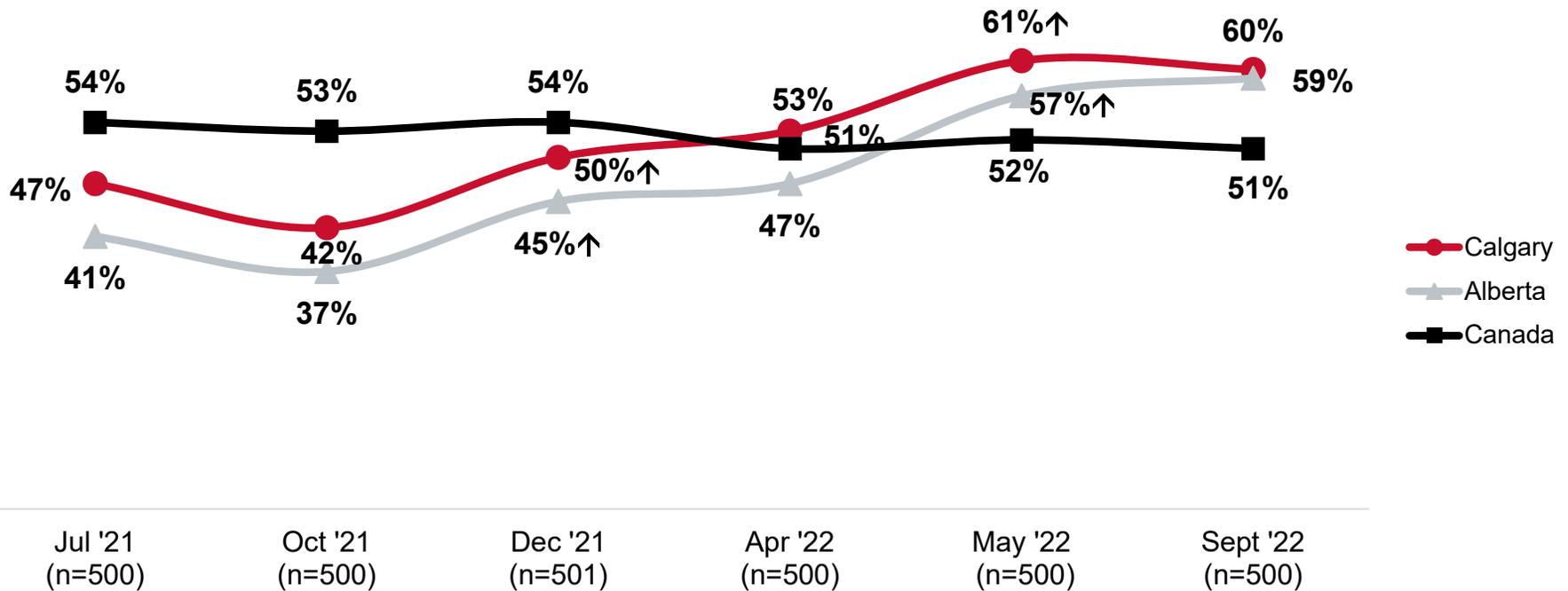
Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=500)



Tracking Current Economic Situation

Positive ratings for the economic situation in Calgary and Alberta have held steady after increasing significantly in May 2022, suggesting that Calgarians continue to have a more positive outlook on local economies. Economic perceptions of Canada overall have varied slightly over the past couple of years but remain consistent over the past year.

Tracking Current Economic Situation ('Good' Ratings)



Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=500)

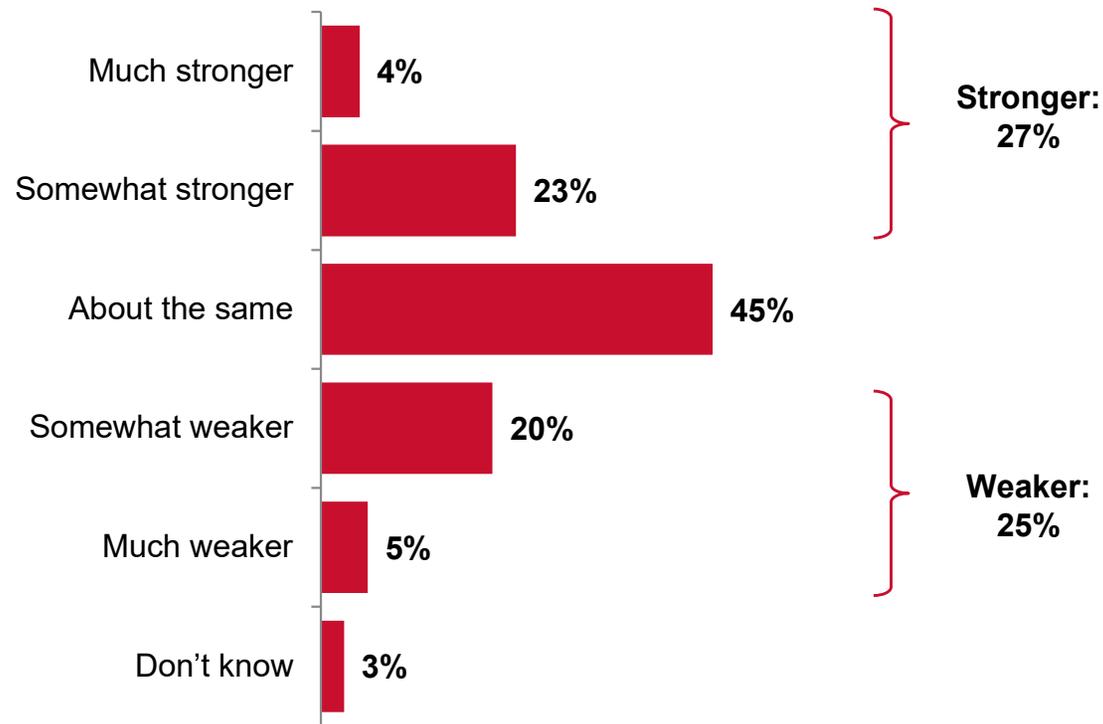
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



Future of the Economy in Calgary

One quarter (27%) of Calgarians have a positive outlook of Calgary’s economy in the next six months, while a similar proportion (25%) expect it to be weaker. Those under the age of 65 are more likely to think the economy will weaken (28% vs. 14% ages 65+).

Expectation of Economy in Six Months



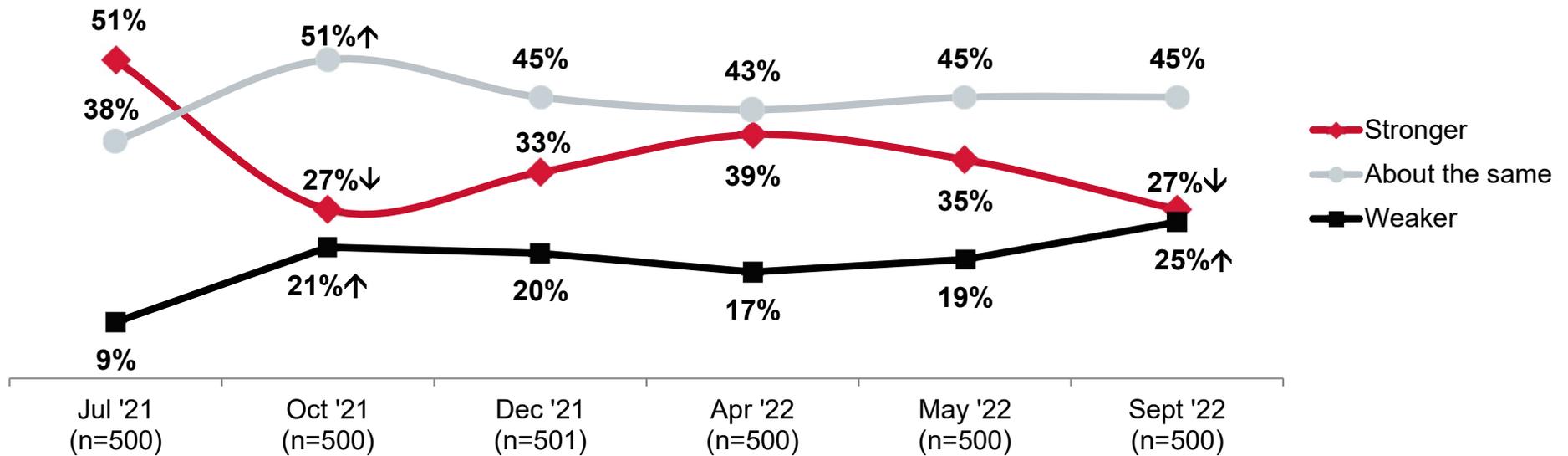
Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?
 Base: all respondents (n=500)



Tracking Future of the Economy in Calgary

Calgarians are less optimistic about the future of Calgary’s economy in September 2022. The proportion of those who expect the economy to be stronger in the next six months has declined from 35% in May 2022 to 27% in September 2022. The proportion of those who expect the economy to be weaker has increased from 19% in May 2022 to 25% in September 2022.

Expectation of Economy 6 Months from Now



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=500)

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

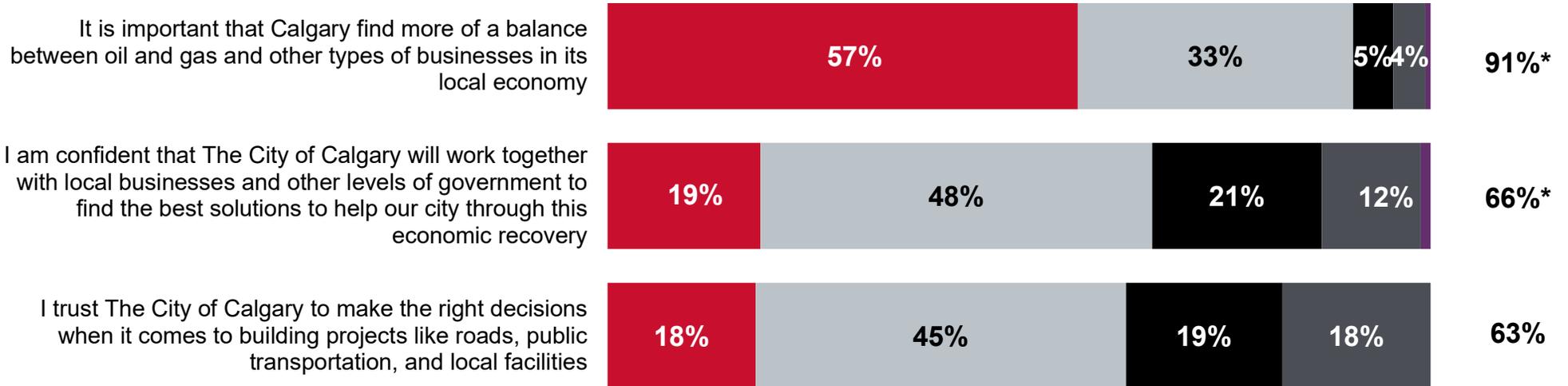
Perceptions of The City’s Role in the Economic Recovery and Investments

Nine-in-ten (91%) Calgarians 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.” Two-thirds (66%) feel that The City will “work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery”, and a similar proportion (63%) feel that The City will make the right decisions in terms of building projects (roads, public transportation, local facilities). Residents who have lived in Calgary for less than 10 years are more likely to agree that they are “confident that The City of Calgary will work together with local businesses” (82% agree vs. 64% 10 to 20 years, 63% 20+ years), and that The City will make the right decisions in terms of building projects (80% agree vs. 60% 10 to 20 years, 59% 20+ years).

Agreement with Perceptions of The City’s Role in Economic Recovery

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

Agree



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=500)

* Indicates rounding

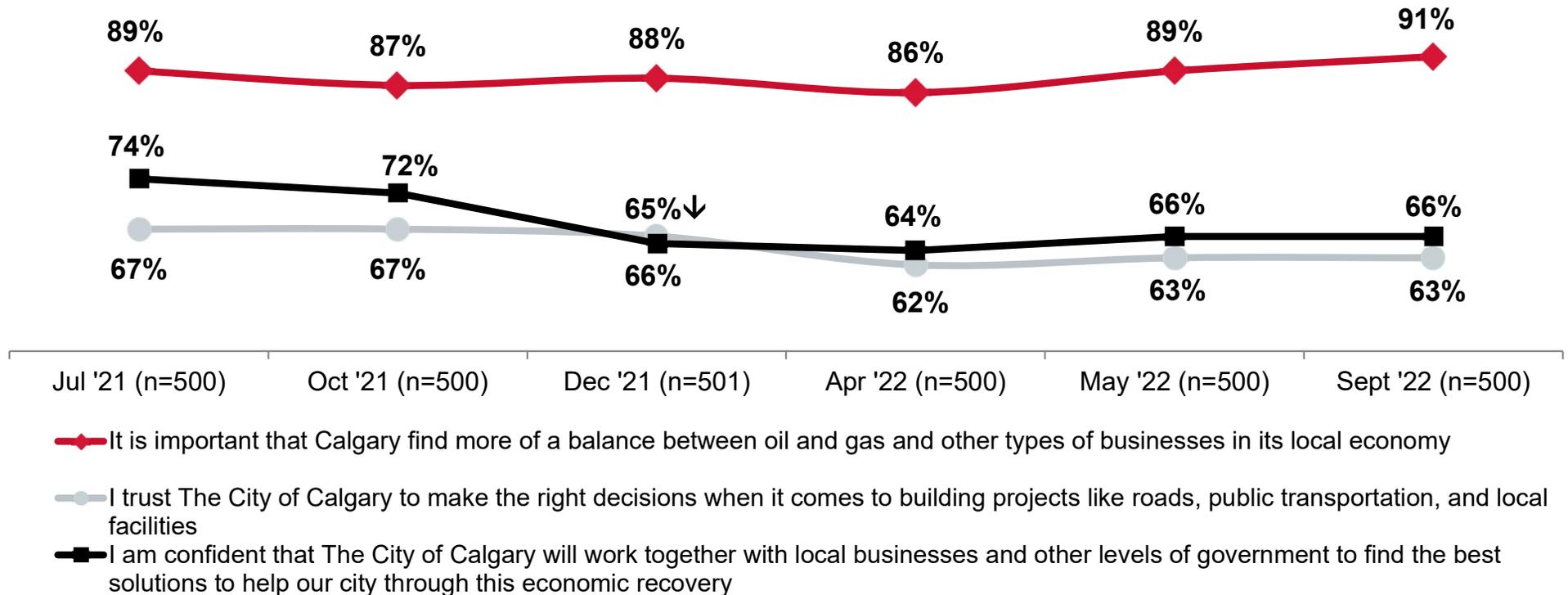
Note: 3% and lower not labelled



Tracking Perceptions of The City's Role in the Economic Recovery and Investments

Compared to May 2022, perceptions of The City's role in economic recovery and investments is stable.

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.

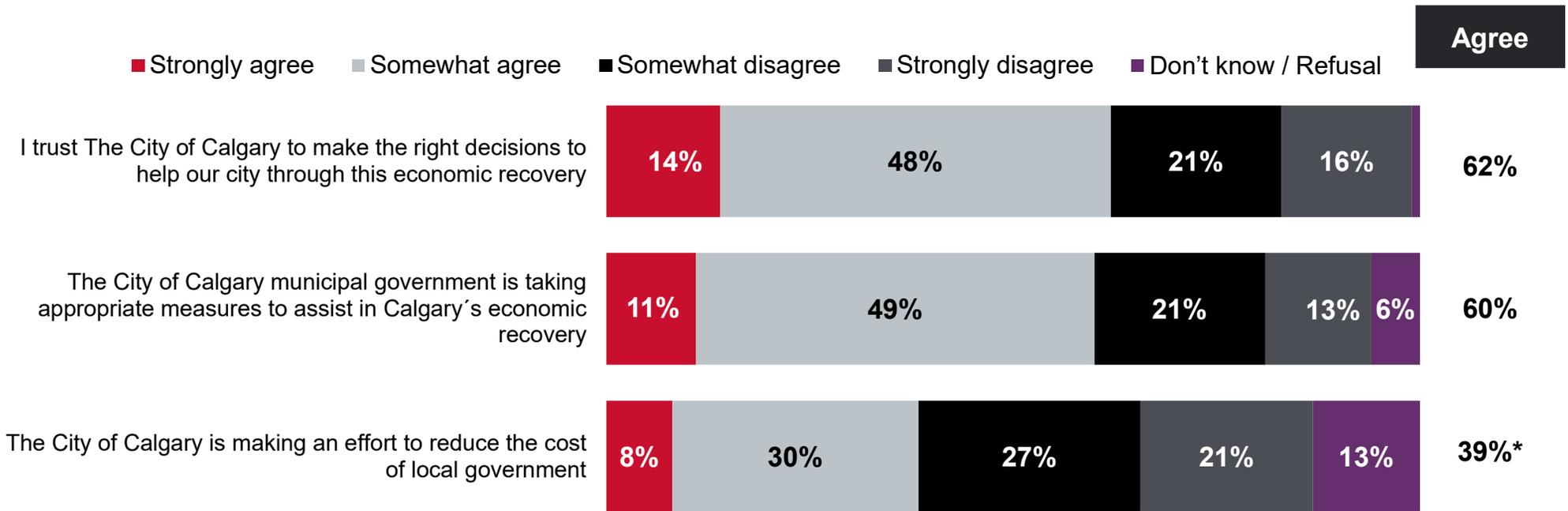
Base: all respondents (n=500)

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

Perceptions of The City’s Role in the Economic Recovery and Investments

Three-in-five (62%) Calgarians trust The City to “make the right decisions to help our city through this economic recovery.” Residents who have lived in Calgary for less than 10 years are more likely to agree with this statement (80% agree vs. 59% 10 to 20 years, 60% 20+ years). Three-in-five Calgarians (60%) believe that The City’s municipal government is taking the appropriate measures to assist in Calgary’s economic recovery. Calgarians who have lived in Calgary less than 10 years (73%) are more likely to agree with this statement than those who have lived in Calgary for 20+ years (57%). In terms of The City making an effort to reduce the cost of local government, more Calgarians disagree (48%) with this statement than agree (39%).

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=500)

* Indicates rounding

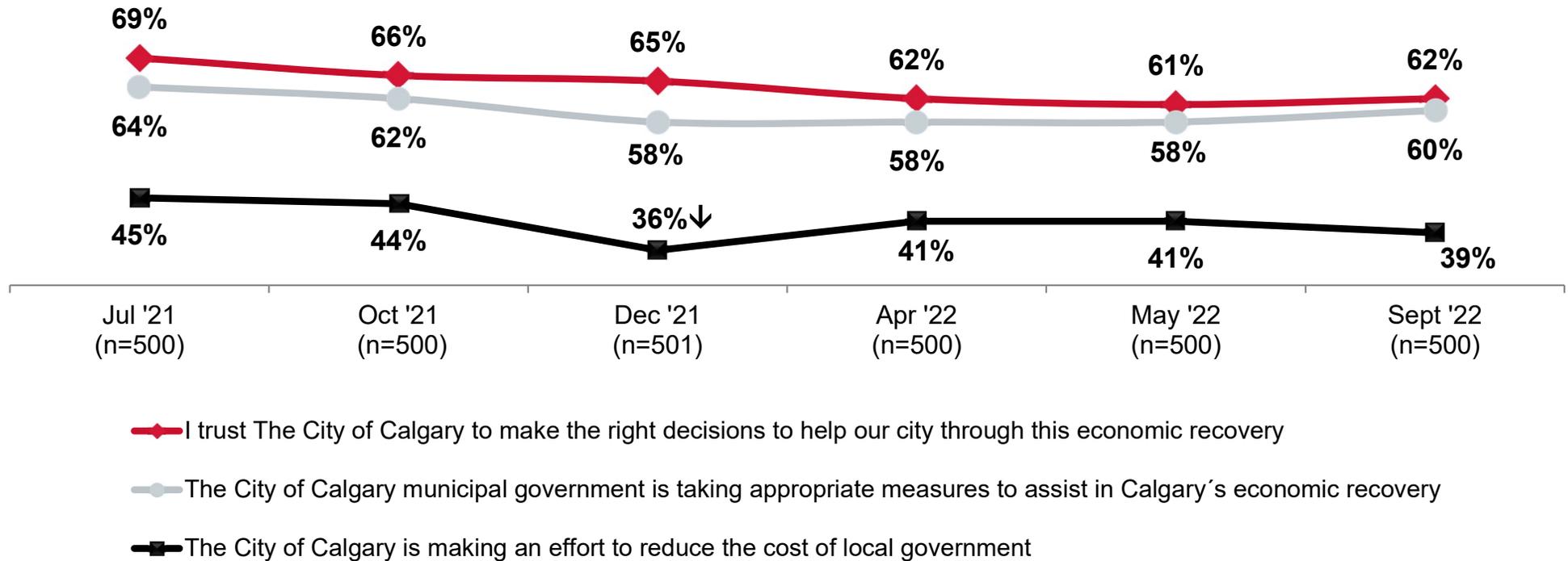
Note: 3% and lower not labelled



Tracking Perceptions of The City's Role in the Economic Recovery and Investments

Perceptions of The City's role in economic recovery and working with local businesses and other levels of government have remained consistent since May 2022. However, the proportion who agree they trust The City to "make the right decisions to help our city through this economic recovery" has declined from 69% in July 2021 to 62% in September 2022.

Agreement with Perceptions of The City's Role in Economic Recovery



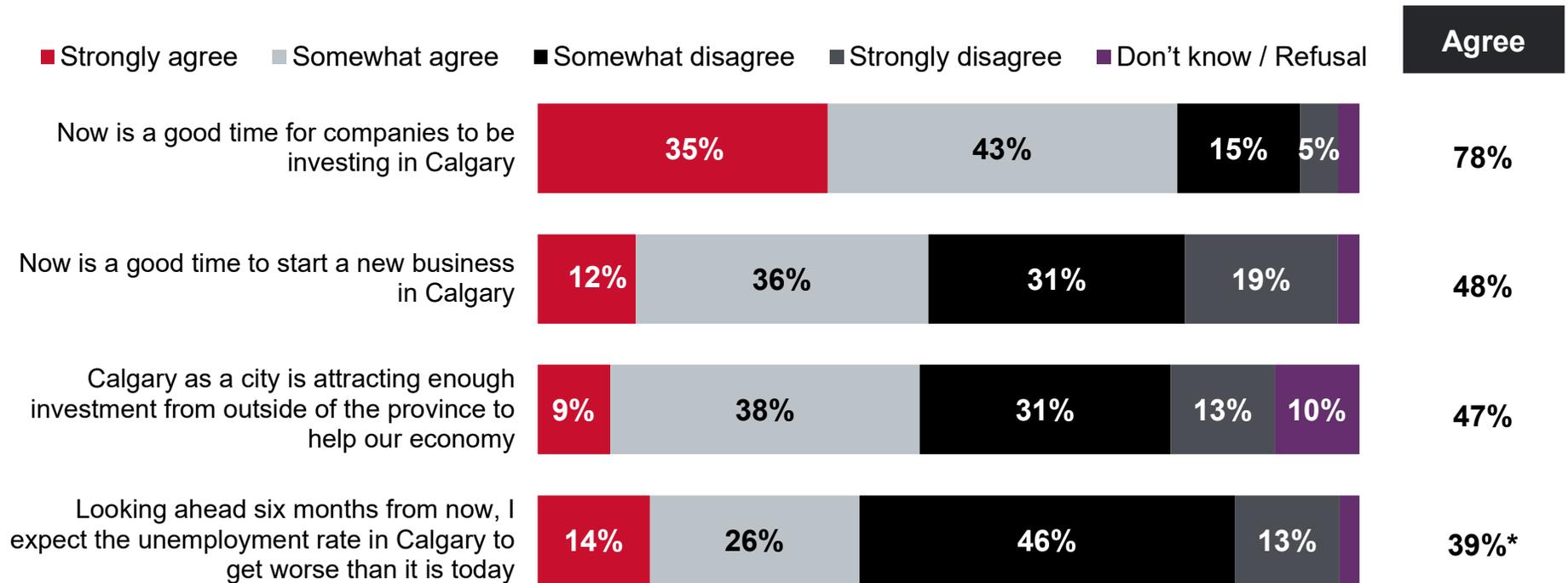
Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.
 Base: all respondents (n=500)

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

Perceptions of Calgary's Economic Recovery and Investments

Four-in-five Calgarians (78%) believe that “now is a good time for companies to be investing in Calgary.” Almost one-half (48%) believe “now is a good time to start a new business in Calgary,” and that Calgary is “attracting enough out-of-province investment to help the economy” (47%). Retired Calgarians are more likely than those employed to agree that “Calgary as a city is attracting enough investment” (56% vs. 42% employed). Two-in-five (39%) Calgarians believe that the unemployment rate in Calgary will worsen in 6 months’ time.

Agreement with Perceptions of Calgary's Economic Recovery



Q9B. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the current economic recovery.
Base: all respondents (n=500)

* Indicates rounding

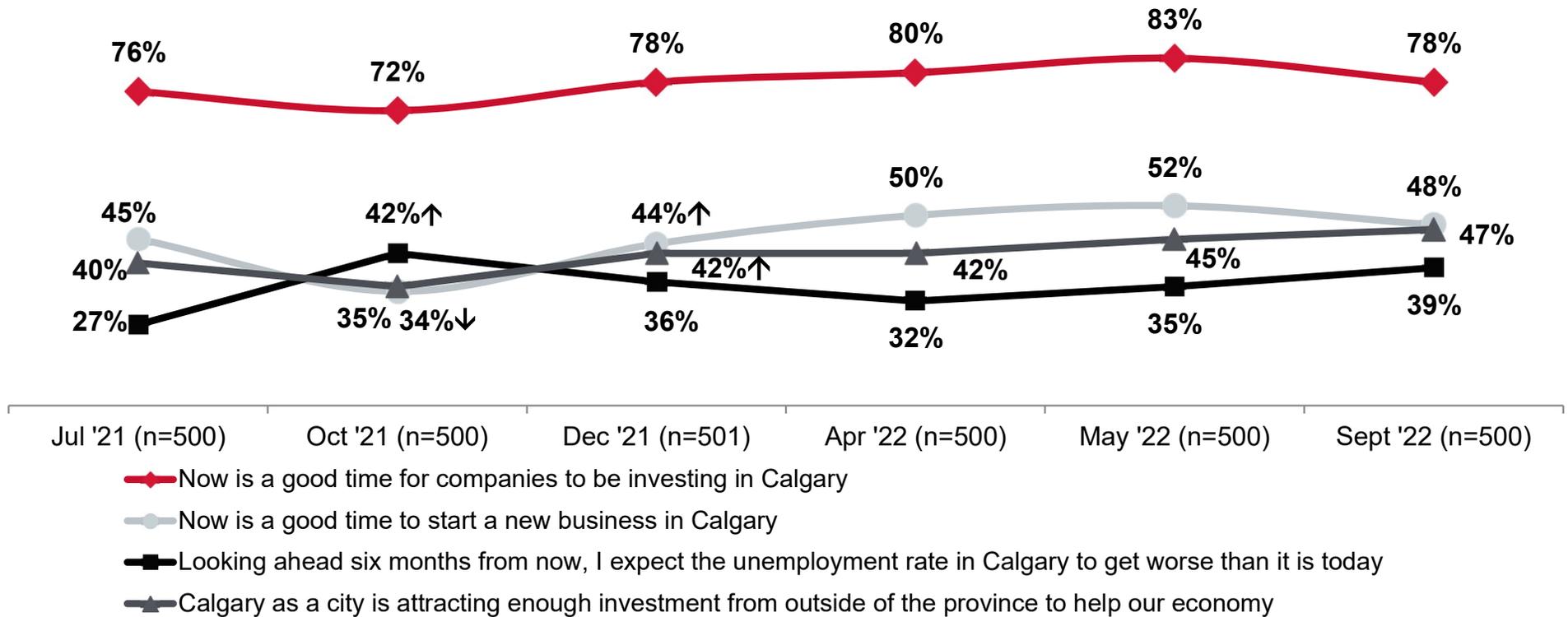
Note: 3% and lower not labelled



Tracking Perceptions of Calgary's Economic Recovery and Investments

Results are consistent for all four statements of perceptions on recovery and investment in Calgary's economy. Agreement that "Calgary as a city is attracting enough investment from outside of the province to help our economy" has been trending upwards since October 2021 and sits at 47%.

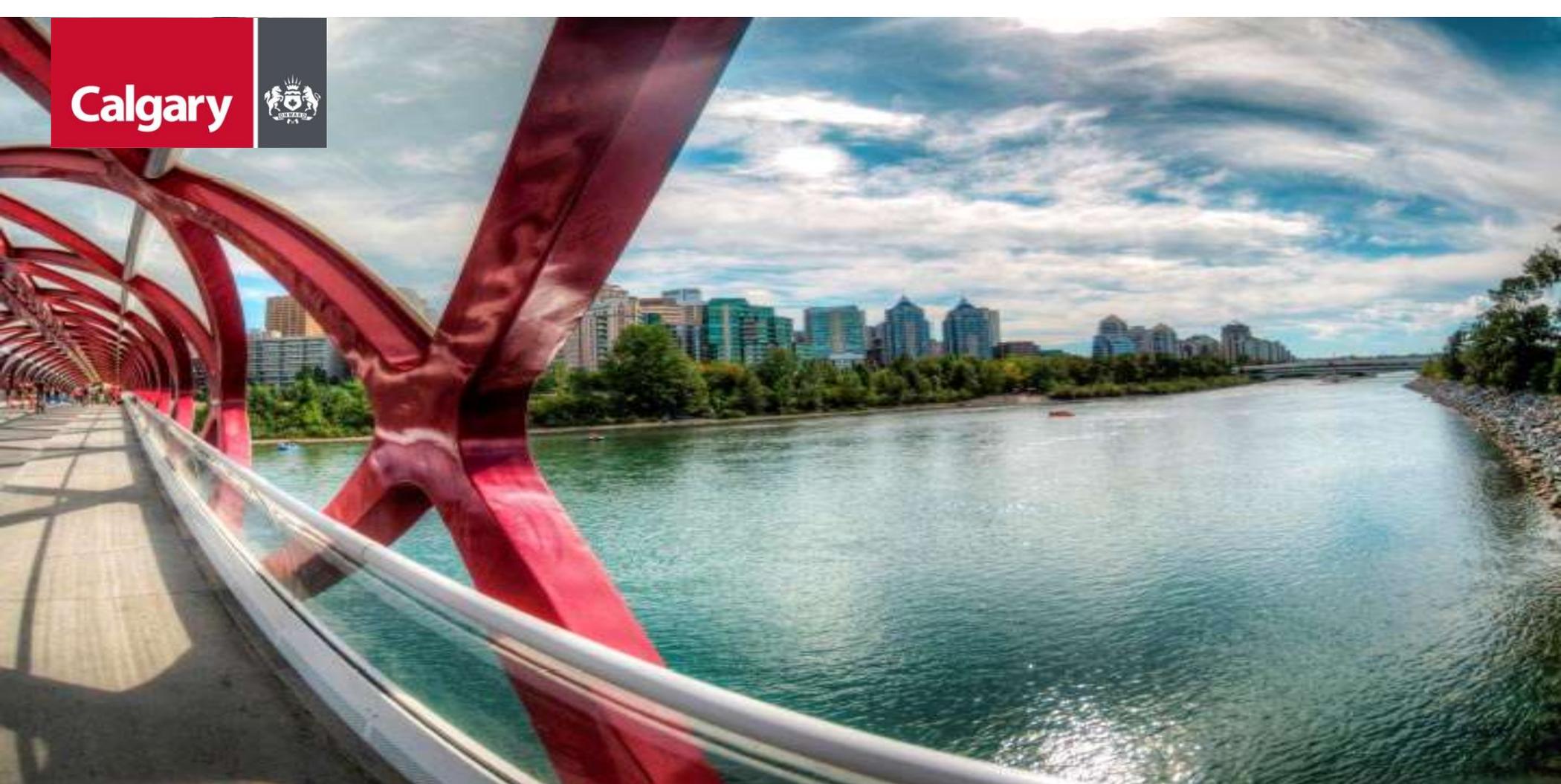
Agreement with Perceptions of Calgary's Economic Recovery



Q9B. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the current economic recovery.

Base: all respondents (n=500)

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

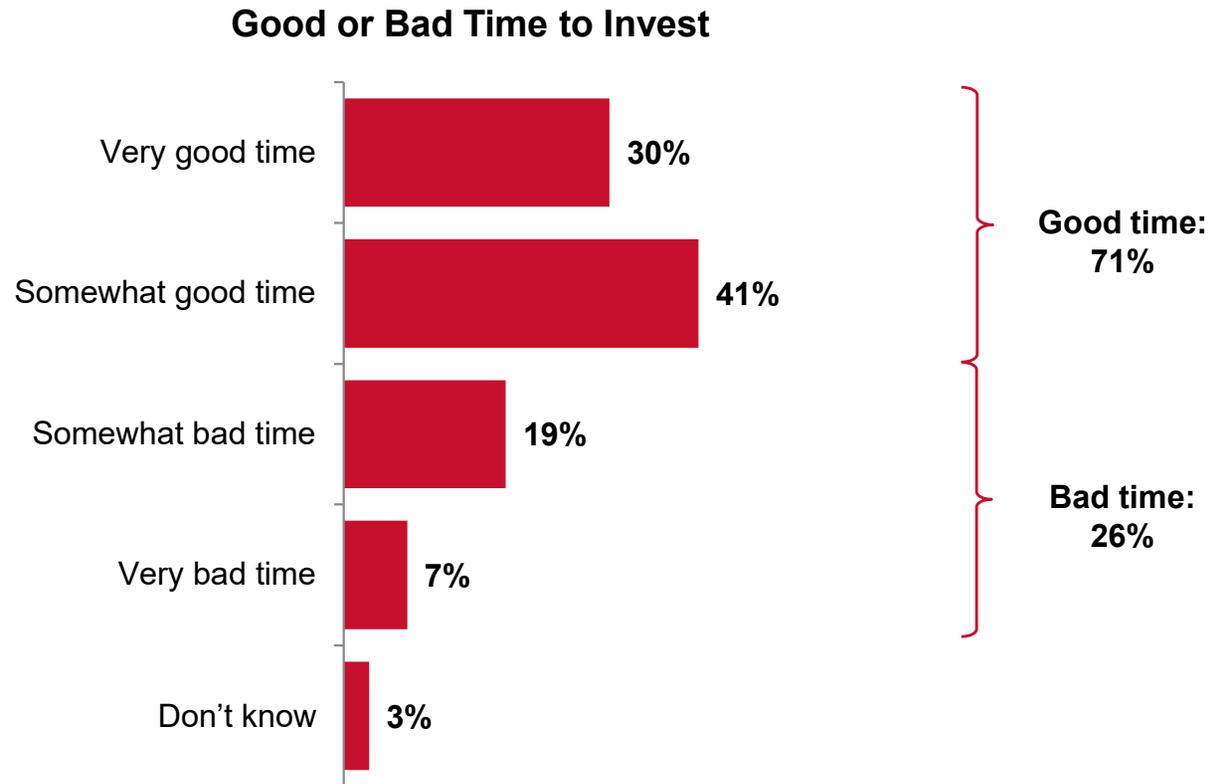


Infrastructure Investment



Infrastructure Investment

Seven-in-ten (71%) Calgarians believe it is a “good time” for The City to invest in new infrastructure projects.



Q11. 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? I am referring to the Calgary municipal government, including Council and Administration.

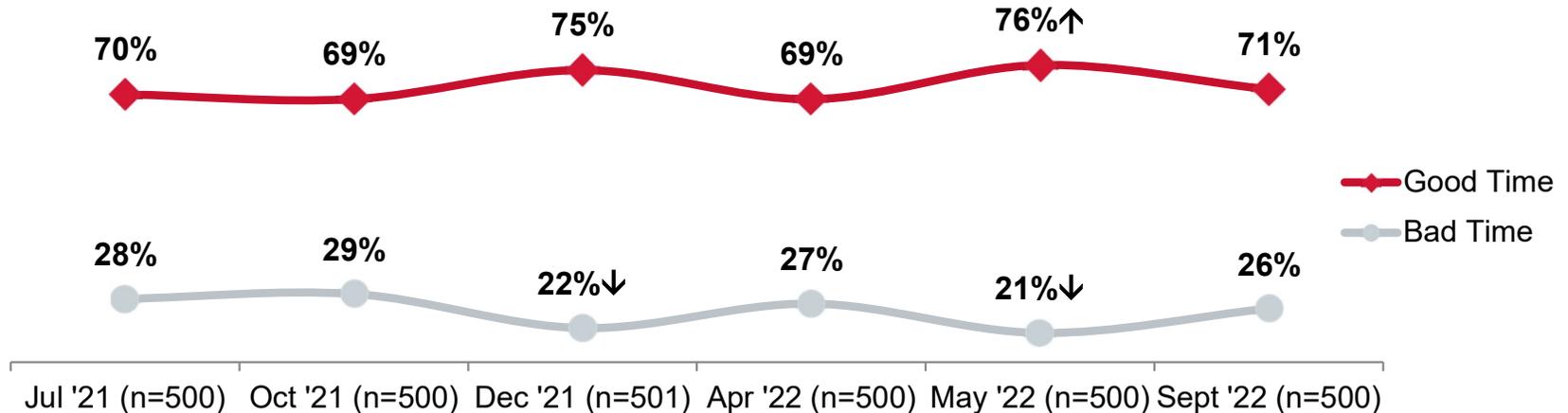
Base: all respondents (n=500)



Tracking Infrastructure Investment

The proportion of Calgarians who believe it is a “good time” for The City of Calgary to invest in infrastructure has decreased directionally in September 2022 after increasing last survey wave in May 2022.

Good or Bad Time for Infrastructure Investment



Q11. 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? I am referring to the Calgary municipal government, including Council and Administration.

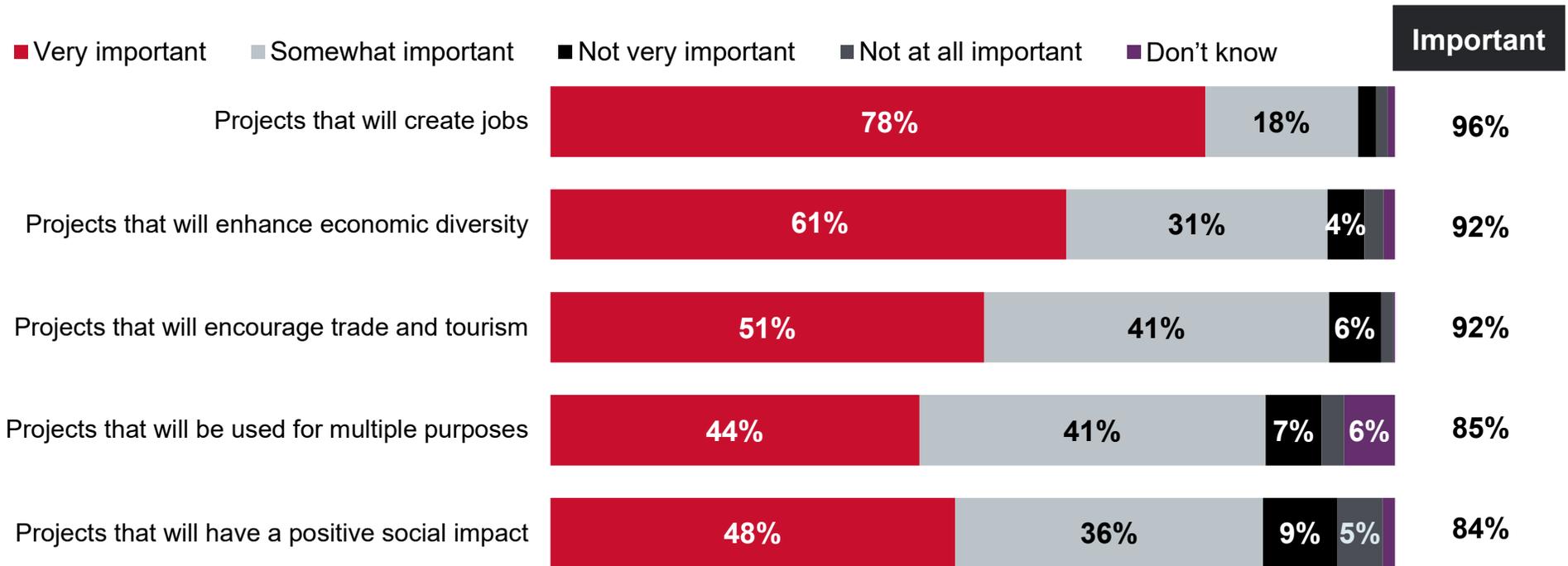
Base: all respondents (n=500)

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

Importance of Different Infrastructure Investments

Nearly all Calgarians feel it is important to invest in infrastructure projects that will create jobs (96%), enhance economic diversity (92%) and encourage trade and tourism (92%). Female respondents rate projects that will create jobs (98%), enhance economic diversity (95%), and have a positive social impact (90%) as significantly more important than male respondents (93%, 90%, and 78%, respectively).

Importance of Infrastructure Projects



Q112. The City of Calgary prioritizes investment in infrastructure projects on an ongoing basis. Please indicate the level of importance you would place on the following types of projects.
Base: all respondents (n=500)

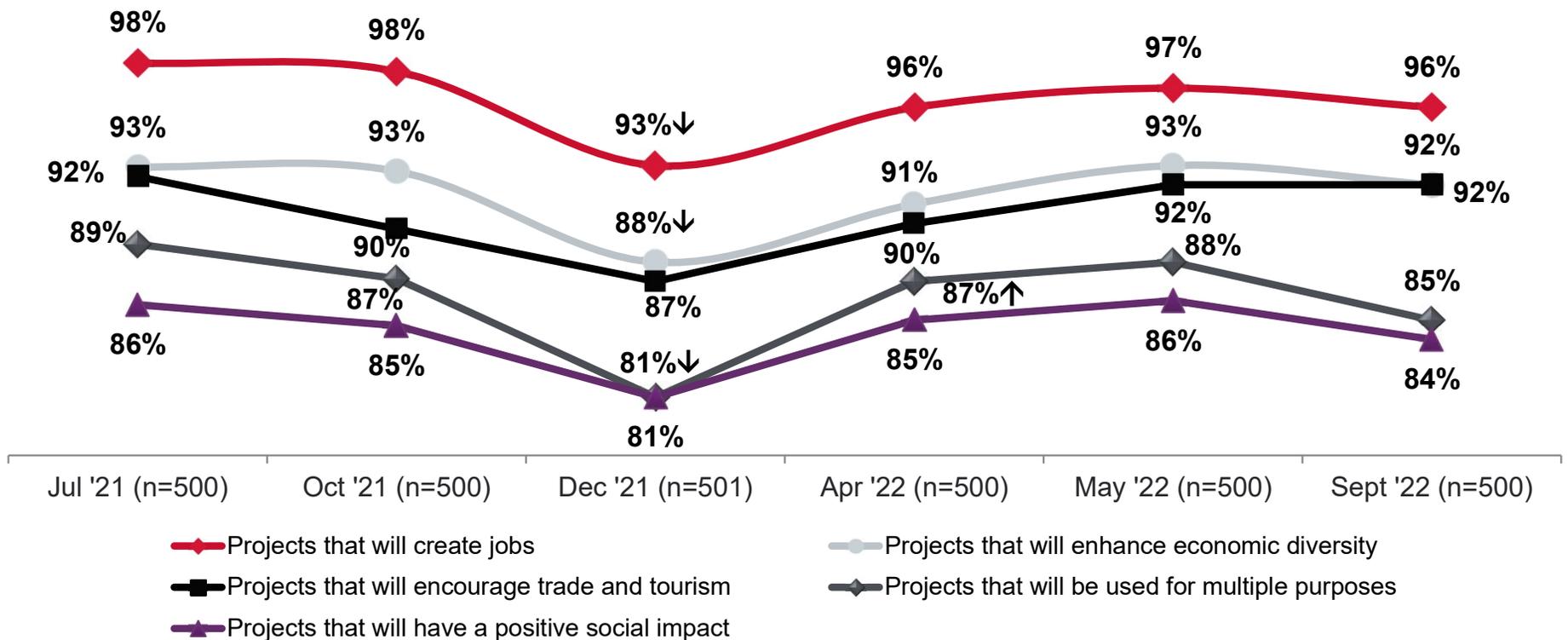
Note: 3% and lower not labelled



Tracking Importance of Different Infrastructure Investments

The importance of different infrastructure projects are consistent with May 2022 but are no longer trending upward as they previously were.

Importance of Infrastructure Projects



Q12. The City of Calgary prioritizes investment in infrastructure projects on an ongoing basis. Please indicate the level of importance you would place on the following types of projects.
Base: all respondents (n=500)

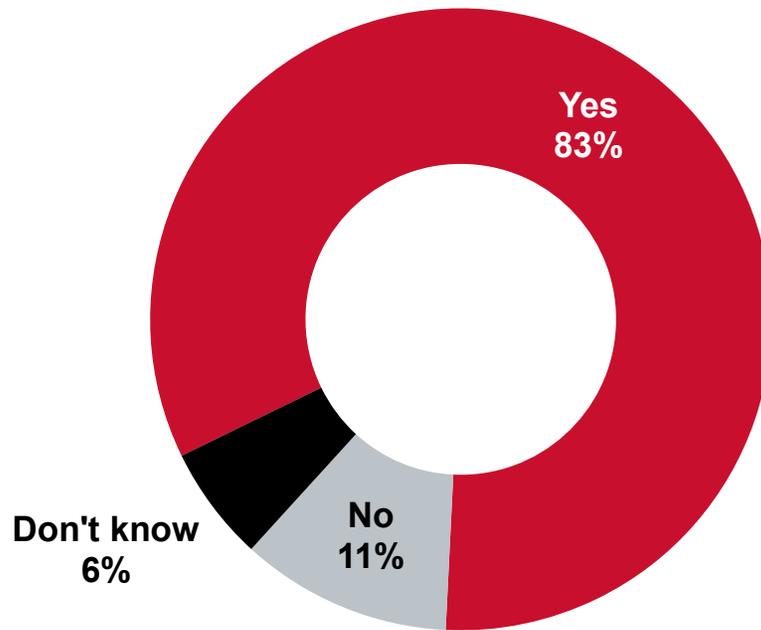
↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave



Investing Up-front in Infrastructure

Four-in-five Calgarians (83%) believe “The City should invest more up-front on infrastructure projects if it means reduced maintenance costs and extended timelines for replacement.” Approximately one-in-ten (11%) Calgarians do not support this.

Support More Up-front Infrastructure Investment



Q113. Thinking about infrastructure planning and investment, should The City invest more up front on infrastructure projects if it means reduced maintenance costs and extended timelines for replacement?

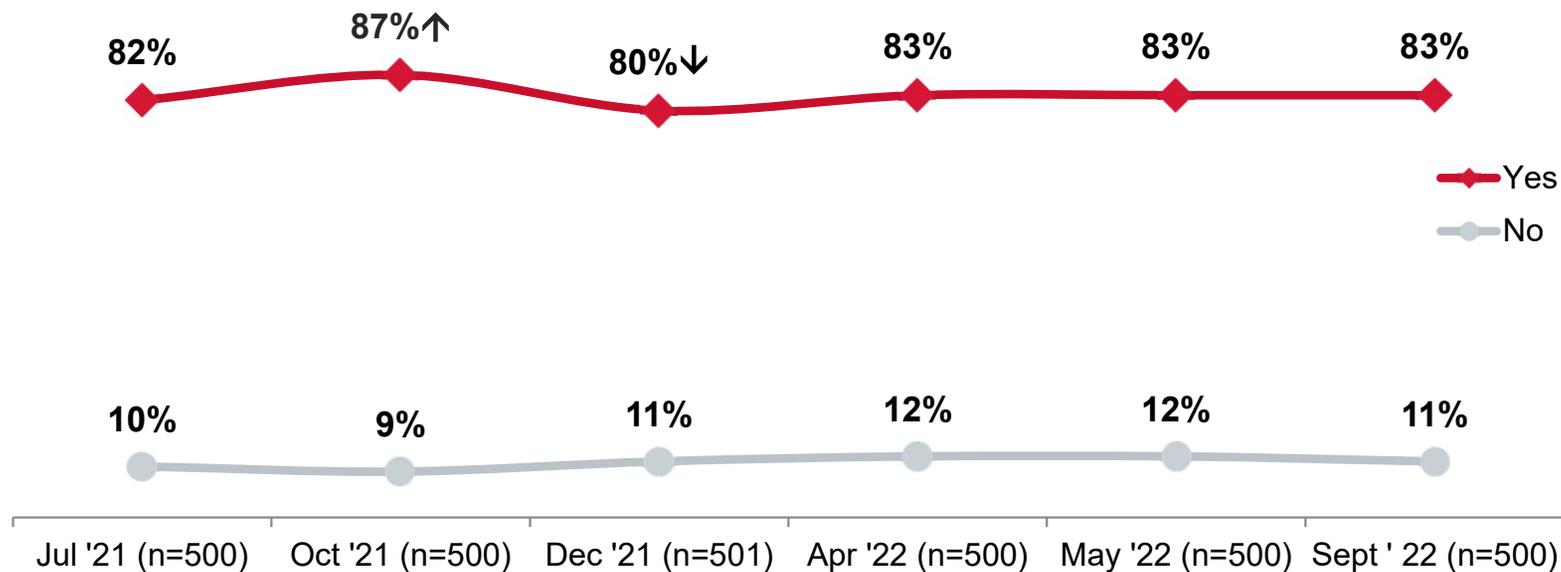
Base: all respondents (n=500)



Tracking Investing Up-front in Infrastructure

Support for more up-front investment in infrastructure projects to reduce maintenance costs and extend timelines for replacement is consistent with May 2022. Likewise, opposition to the idea has remained consistently low.

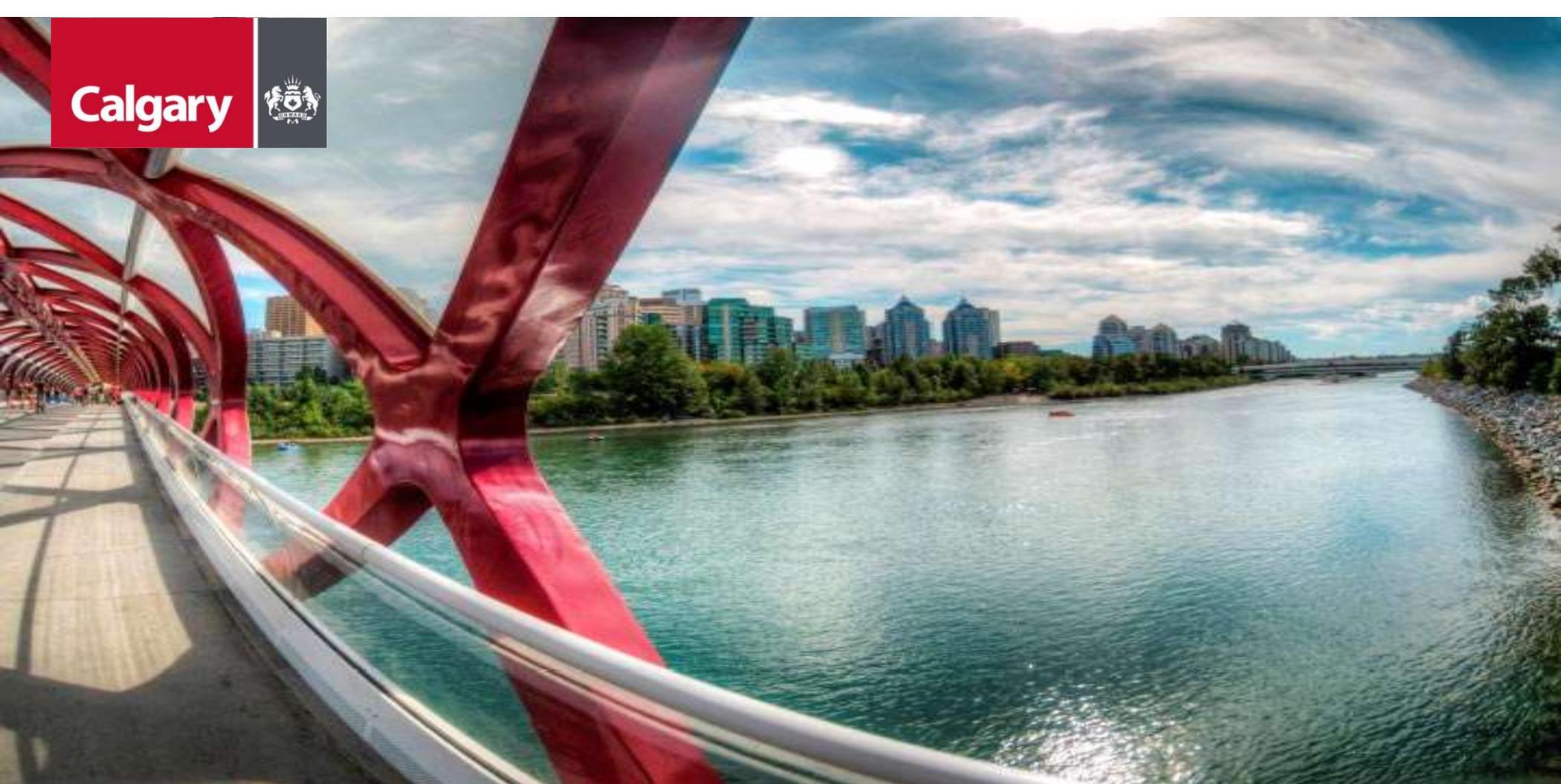
Support More Up-front Infrastructure Investment



Q113. Thinking about infrastructure planning and investment, should The City invest more up front on infrastructure projects if it means reduced maintenance costs and extended timelines for replacement?

Base: all respondents (n=500)

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



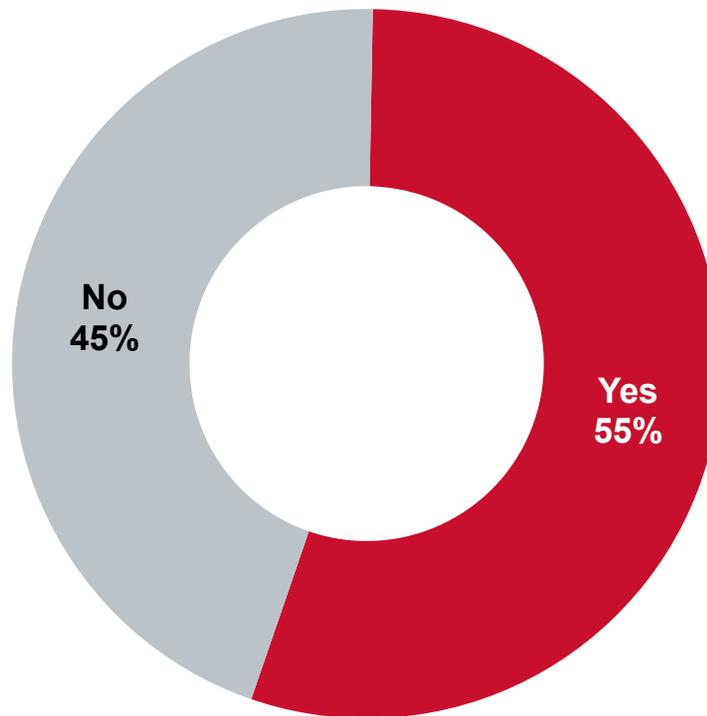
Taxes and User Fees



Awareness of City Collecting Provincial Property Tax

Over one-half (55%) are aware that The City collects property tax on behalf of the provincial government. Survey respondents aged 65 years and older are more likely to be aware of this (74%) compared to those under the age of 65 (50%). Calgarians who own their property are also more likely to be aware (59% vs. 45% who rent), as are those who have resided in Calgary for over 20 years (60% vs. 42% less than 10 years).

Aware The City Collects Property Tax on Behalf of the Provincial Government

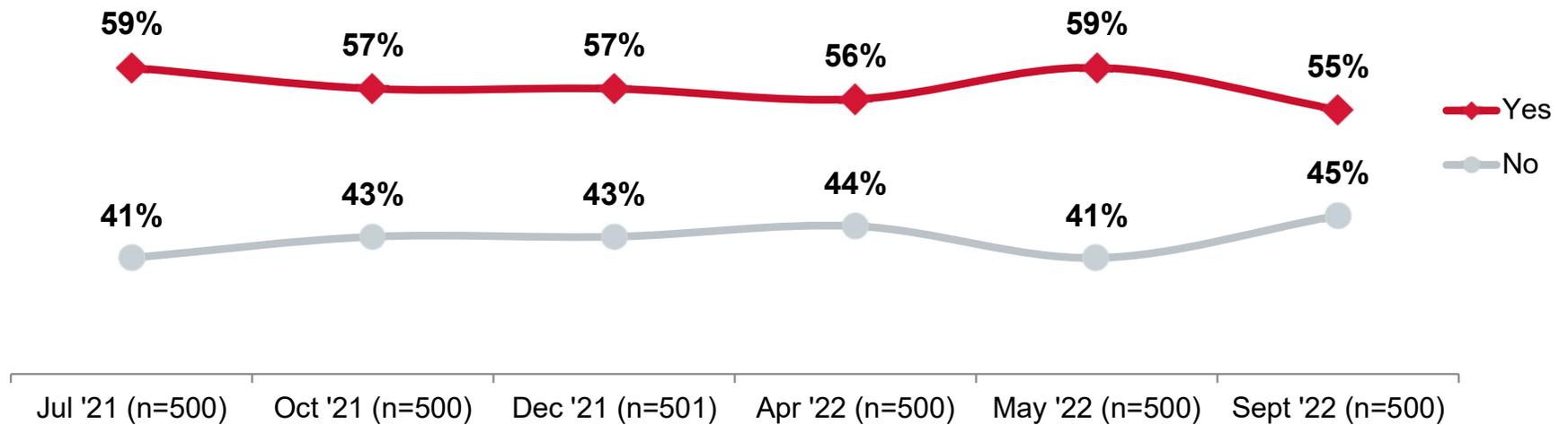


QPT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
 Base: all respondents (n=500)

Tracking Awareness of City Collecting Provincial Property Tax

The proportion of those who are aware The City collects provincial property tax on behalf of the Province has remained consistent over the past five waves of this study, since July 2021.

Aware The City Collects Property Tax on Behalf of the Provincial Government

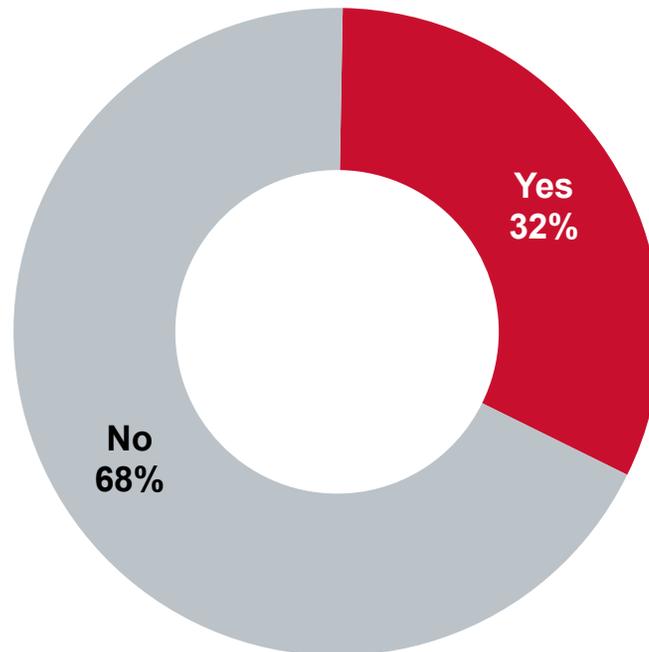


QPT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
 Base: all respondents (n=500)

Awareness of City Tax Allocation to the Province

One-third (32%) of Calgarians are aware that 40% of taxes collected by The City are transferred to the Province. Calgarians over the age of 65 are more likely to be aware (54% vs. 27% under 65), as are those who own their residence (38% vs. 20% who rent), those who have resided in Calgary for over 20 years (38% vs. 18% less than 10 years), and those who do not identify as Racialized (35% vs. 20% identify as Racialized).

Aware 40% of Taxes Collected by The City Are Transferred to the Province



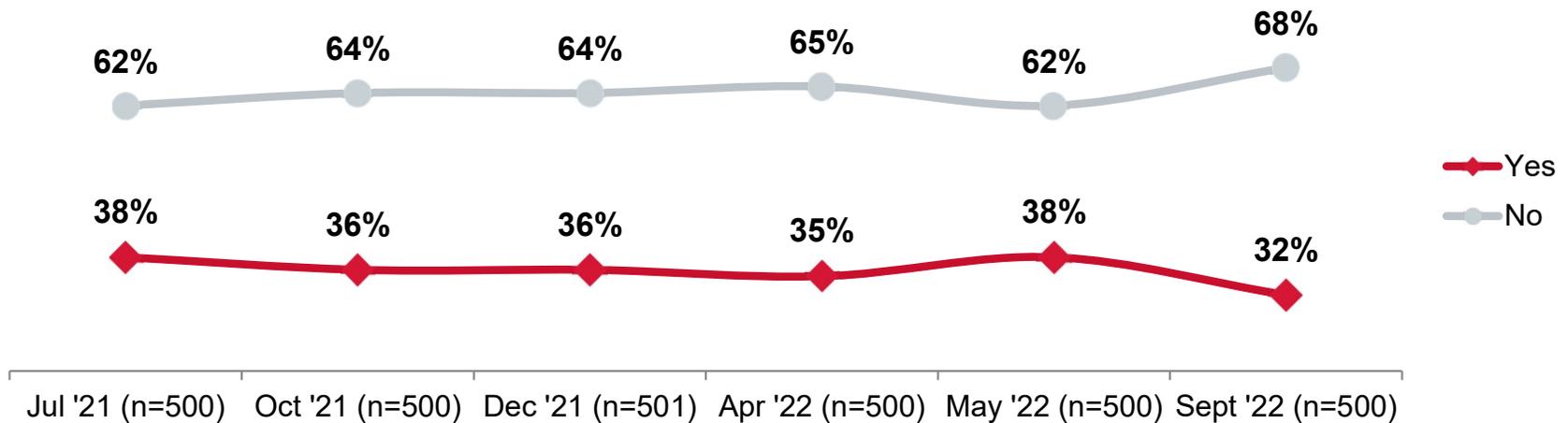
QPT2. Were you aware that approximately 40 per cent of taxes The City collects is transferred to the Province?
Base: all respondents (n=500)



Tracking Awareness of City Tax Allocation to Province

The proportion who are aware that 40% of taxes collected by The City are transferred to the Province has decreased directionally in September 2022 (32%) compared to the last survey wave fielded in May 2022 (38%).

Aware 40% of Taxes Collected by The City Are Transferred to the Province



QPT2. Were you aware that approximately 40 per cent of taxes The City collects is transferred to the Province?

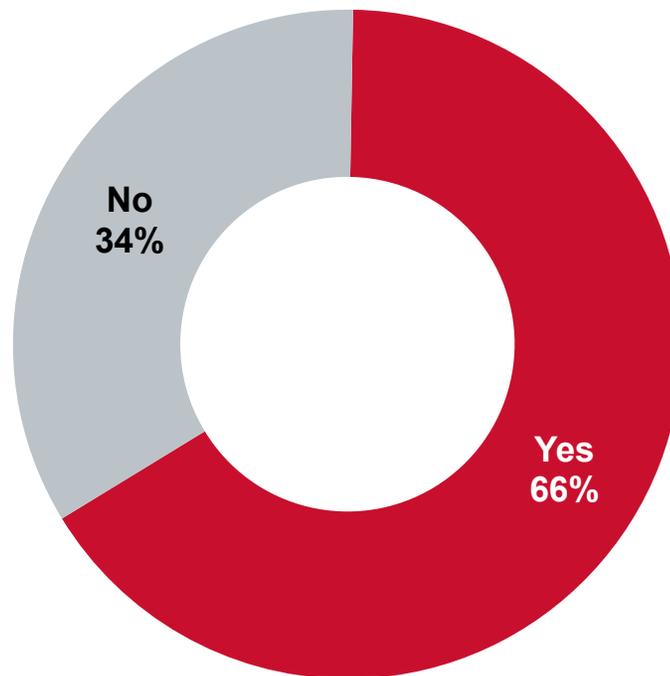
Base: all respondents (n=500)



Awareness of How City Services are Funded

Two-thirds (66%) are aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees. Calgarians who own their residence are more likely to be aware (72% vs. 51% rent), as are those who have resided in Calgary for over 20 years (70% vs. 54% less than 10 years), and those who do not identify as Racialized (71% vs. 52% identify as Racialized).

Aware services funded through tax only, service fees only, or a combination



QPT3. Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?

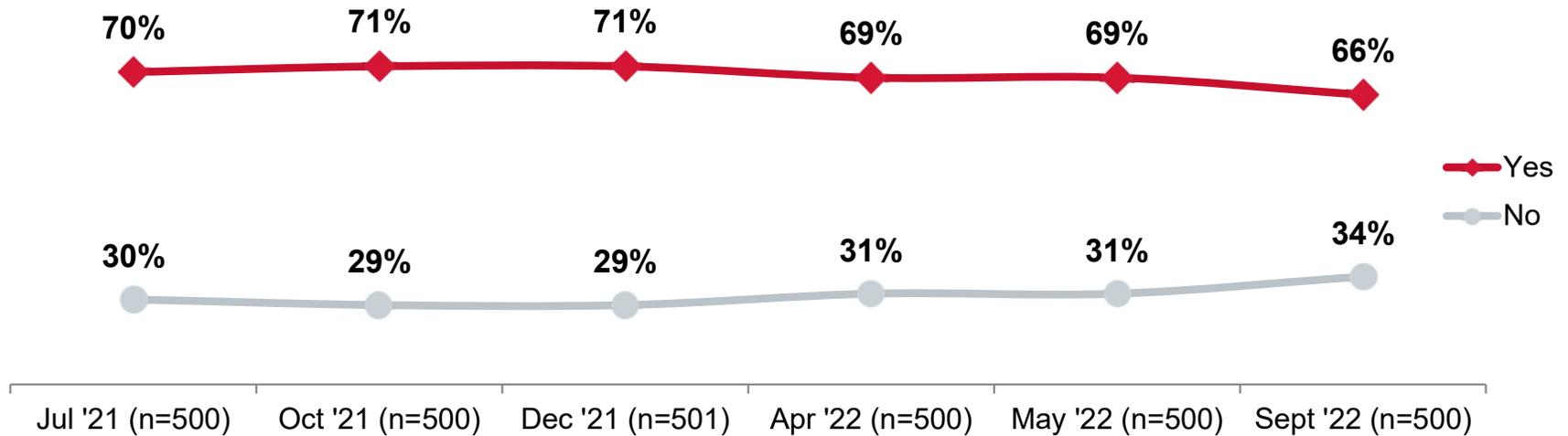
Base: all respondents (n=500)



Tracking Awareness of How City Services are Funded

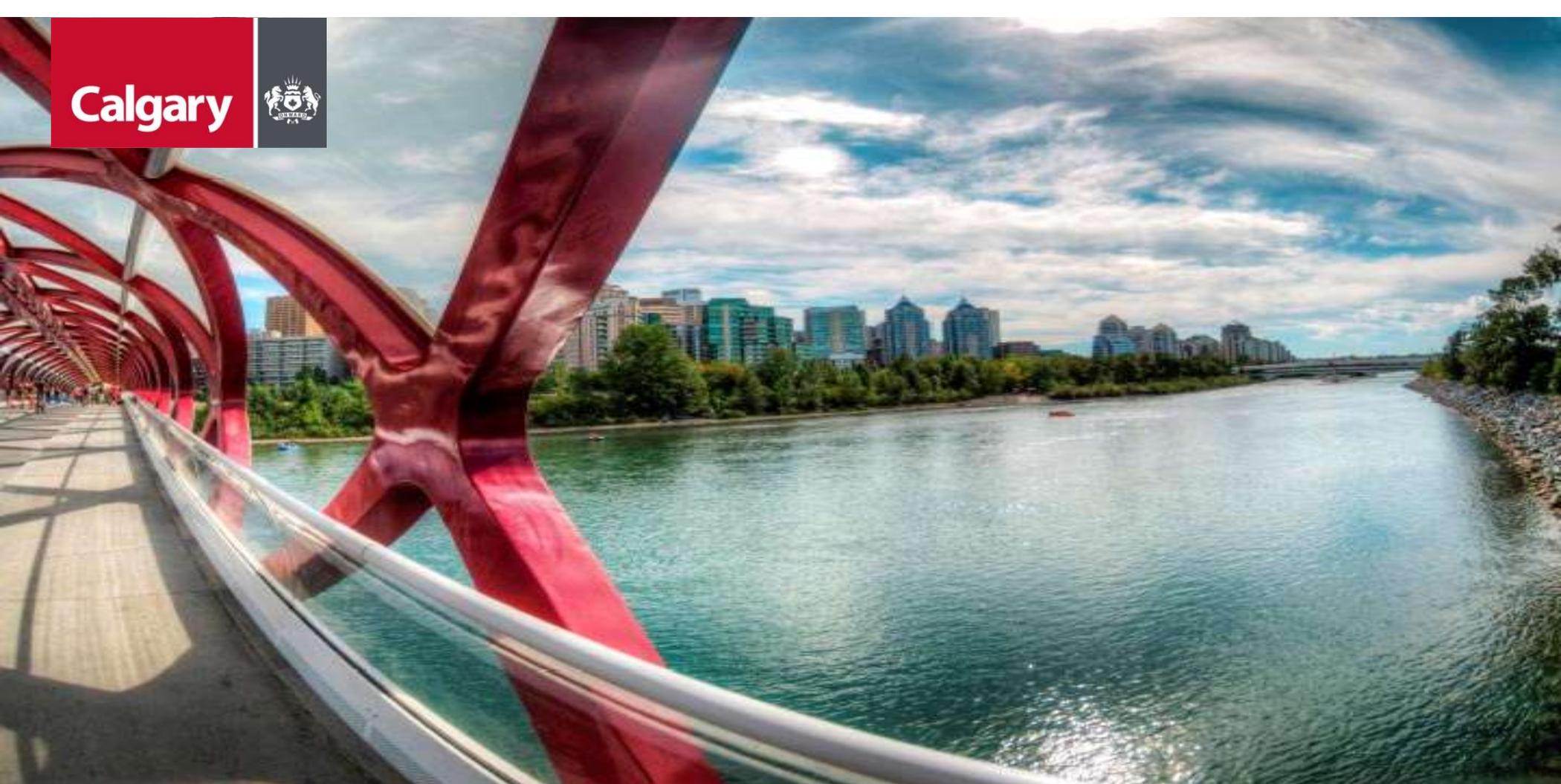
Awareness of how some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees, has remained at a consistent level over the past five waves, since July 2021.

Aware services funded through tax only, service fees only, or a combination



QPT3. Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?

Base: all respondents (n=500)

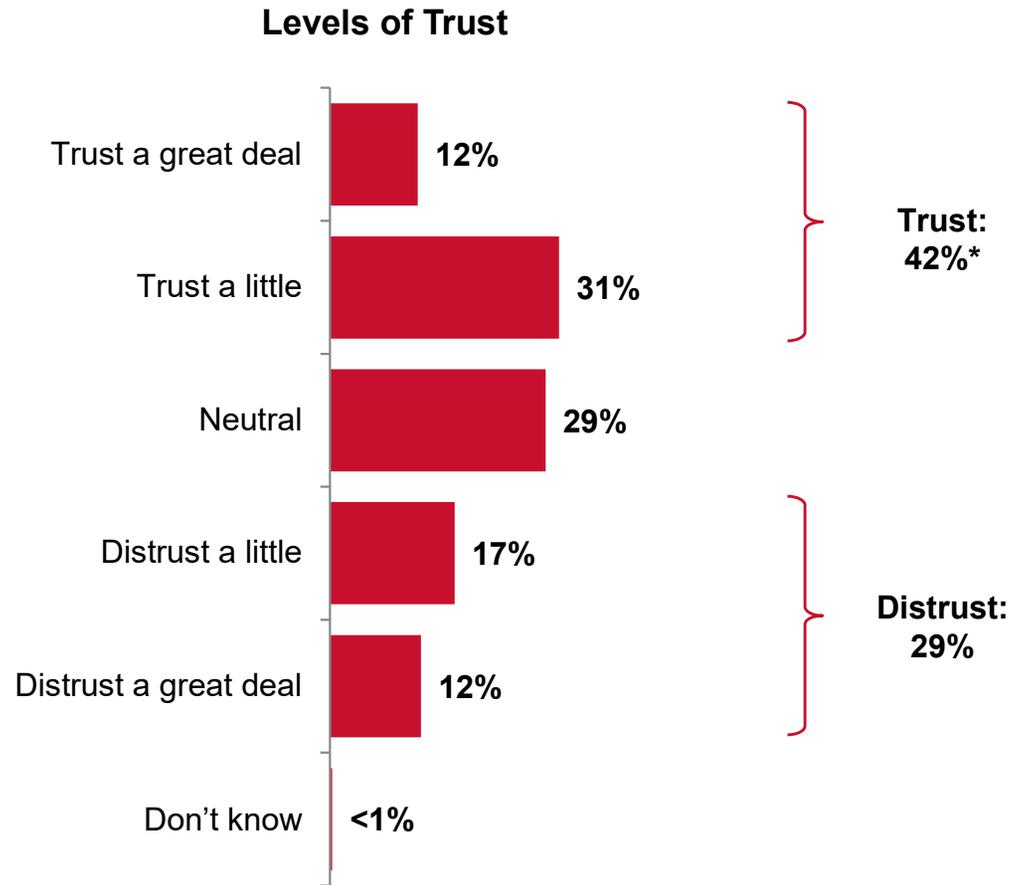


Trust and Reputation



Levels of Trust in The City

Two-in-five (42%) Calgarians trust The City while twenty-nine percent (29%) distrust The City. Calgarians who have resided in Calgary for over 10 years are more likely to distrust The City (29% 10-20 years, 32% over 20 years vs. 14% less than 10 years). Those who identify as Racialized are less likely to distrust The City (20% vs. 31% who do not identify as Racialized).



QTR1. Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

Base: all respondents (n=500)

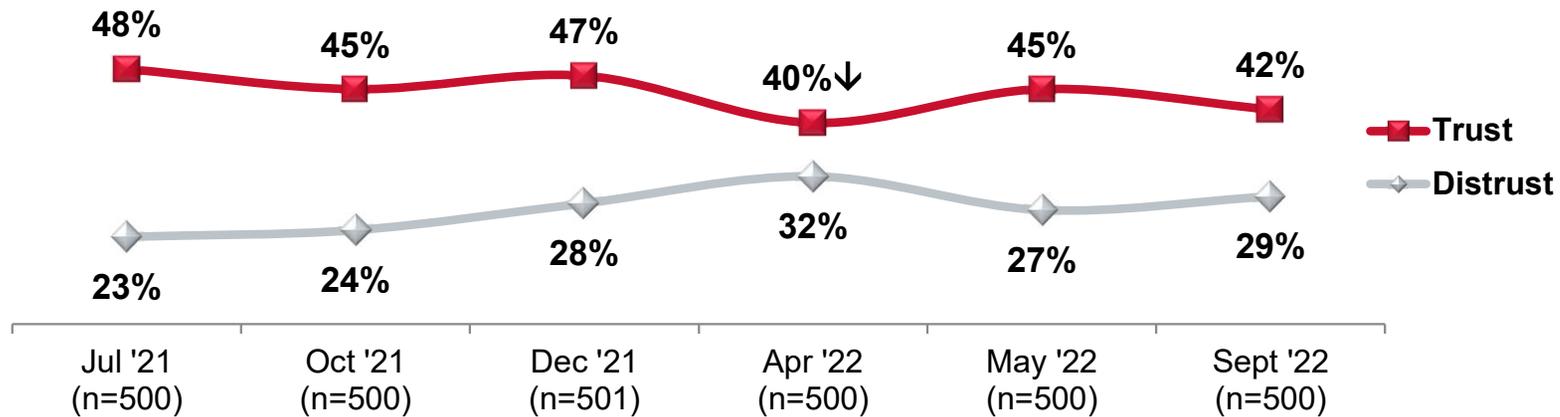
* Indicates rounding



Tracking Levels of Trust in The City

The level of trust (42%) in The City has remained stable since May 2022. However, levels of trust in September 2022 are directionally lower compared to July 2021 (48%), indicating a potential downward trend.

Levels of Trust in The City



QTR1. Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?
 Base: all respondents (n=500)

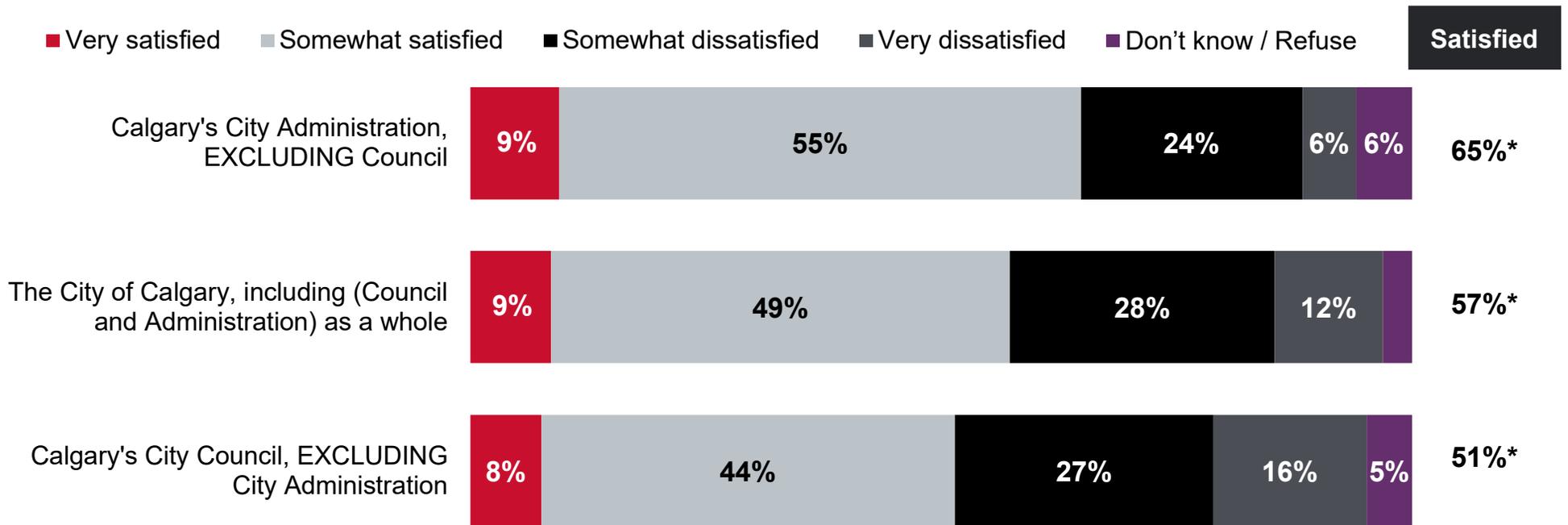
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



Satisfaction with The City

Two-thirds (65%) are satisfied with how City Administration (excluding Council) is going about running the city, followed by satisfaction with The City as a whole (57%), and City Council excluding Administration (51%). Those who have lived in Calgary for less than 10 years are more likely to be satisfied with The City of Calgary as a whole (75% vs. 59% 10-20 years, 52% 20+ years), and with Calgary’s City Council excluding Administration (74% vs. 49% 10-20 years, 47% 20+ years).

Satisfaction with Each Group



* Indicates rounding

Note: 3% and lower not labelled

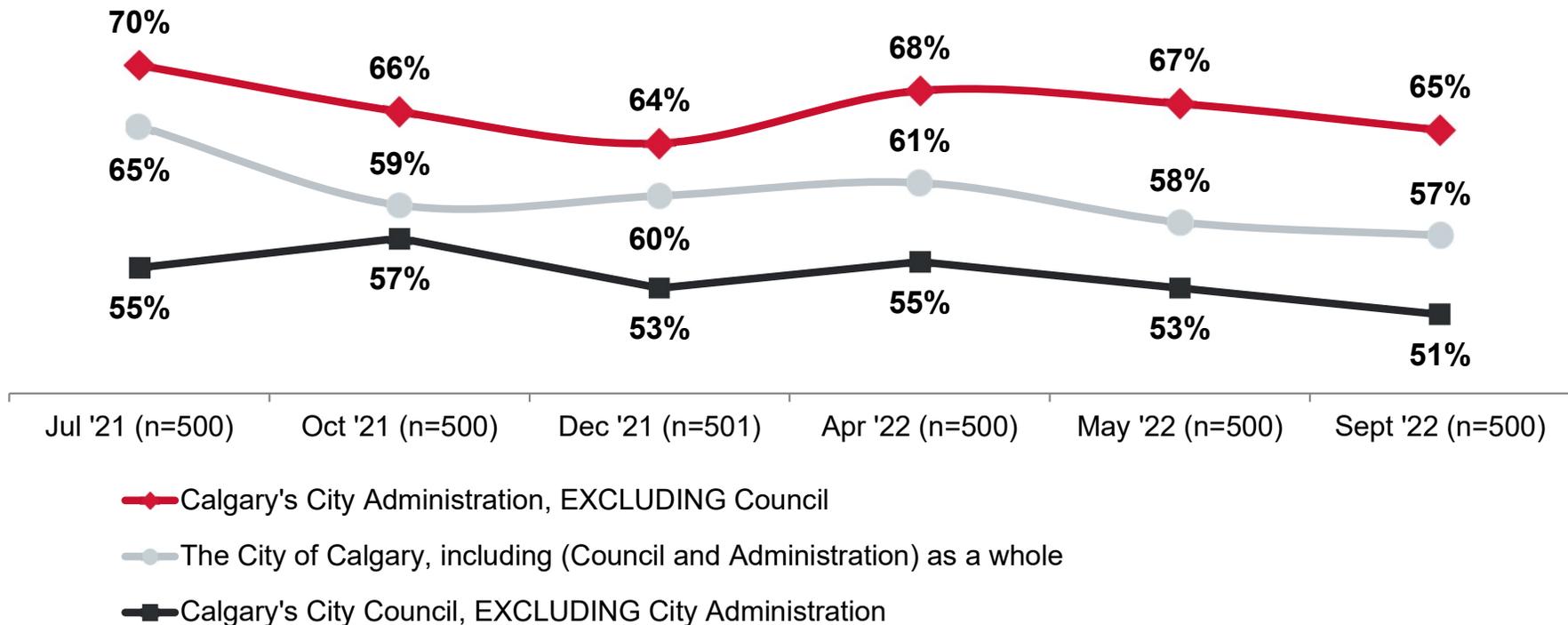
QTR2. Taking everything into account, how satisfied or dissatisfied are you with the way the following groups are going about running our city?
 Base: all respondents (n=500)



Tracking Satisfaction with The City

Satisfaction with The City of Calgary as a whole has trended downwards from July 2021 (65%) and is now significantly lower at 57%. Satisfaction with Calgary's City Administration is directionally lower in September 2022 (65%) compared to July 2021 (70%), indicating a potential downward trend. Satisfaction with Calgary's City Council has been consistent over the past five waves of tracking.

Satisfaction with Each Group



QTR2. Taking everything into account, how satisfied or dissatisfied are you with the way the following groups are going about running our city?
 Base: all respondents (n=500)

Demographics



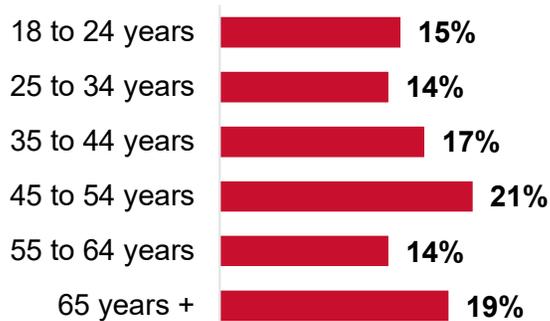


Demographics

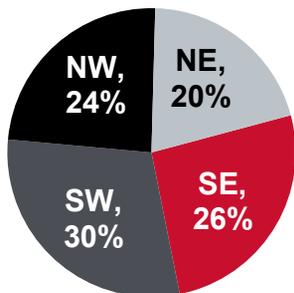
GENDER

Male	49%
Female	50%
Prefer to self describe	<1%
Prefer not to say	1%

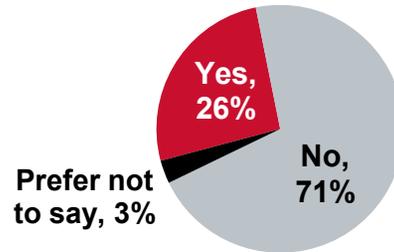
AGE



QUADRANT



RACIALIZED



PEOPLE IN HOUSEHOLD

1	13%
2	36%
3	18%
4 or more	32%
Refuse	1%

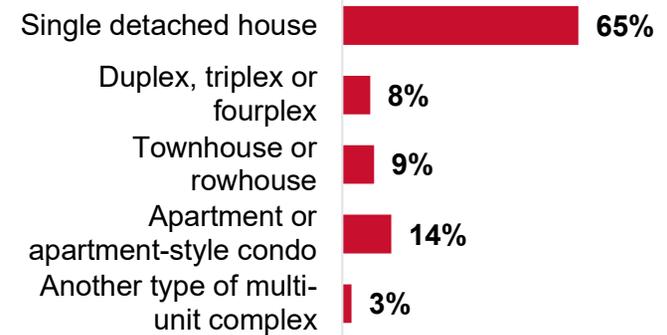
CHILDREN IN HOUSEHOLD

Yes	35%
No	64%

SENIOR IN HOUSEHOLD

Yes	25%
No	74%

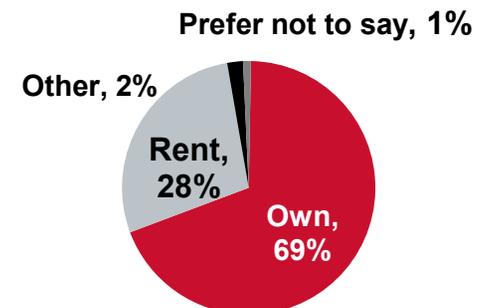
TYPE OF RESIDENCE



RESPONSIBLE FOR PROPERTY TAX/RENT

Yes	86%
No	12%

RESIDENCE

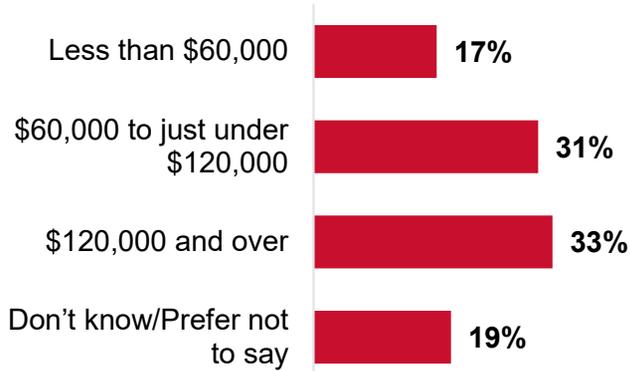


Demographic questions changed in Wave 1
Base: all respondents (n=500)

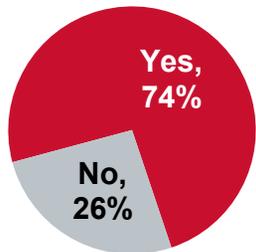


Demographics

ANNUAL HOUSEHOLD INCOME



BORN IN CANADA



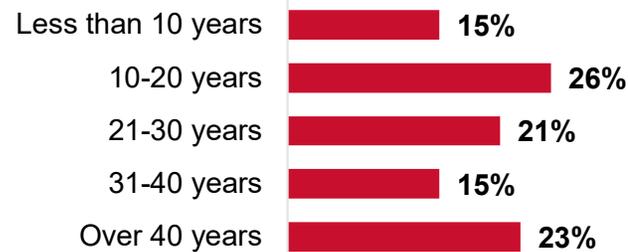
IDENTIFY AS INDIGENOUS

Yes – First Nations	1%
Yes – Métis	2%
Yes - Inuit	<1%
No	96%

EDUCATION

Completed High School or Less	23%
Some Post-Secondary or Completed a College Diploma	30%
Completed University Degree or Post-Graduate Degree	46%

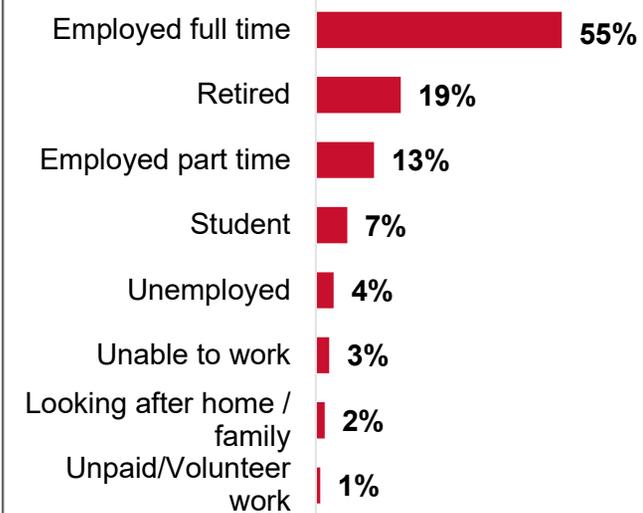
TENURE IN CALGARY



DISABILITY IN HOUSEHOLD

Yes - myself	11%
Yes – someone in my household	8%
No	82%

EMPLOYMENT STATUS



BUSINESS OWNER

Yes	20%
No	78%

IDENTIFY LGBTQ2S+

Yes	10%
No	88%
Prefer not to say	2%

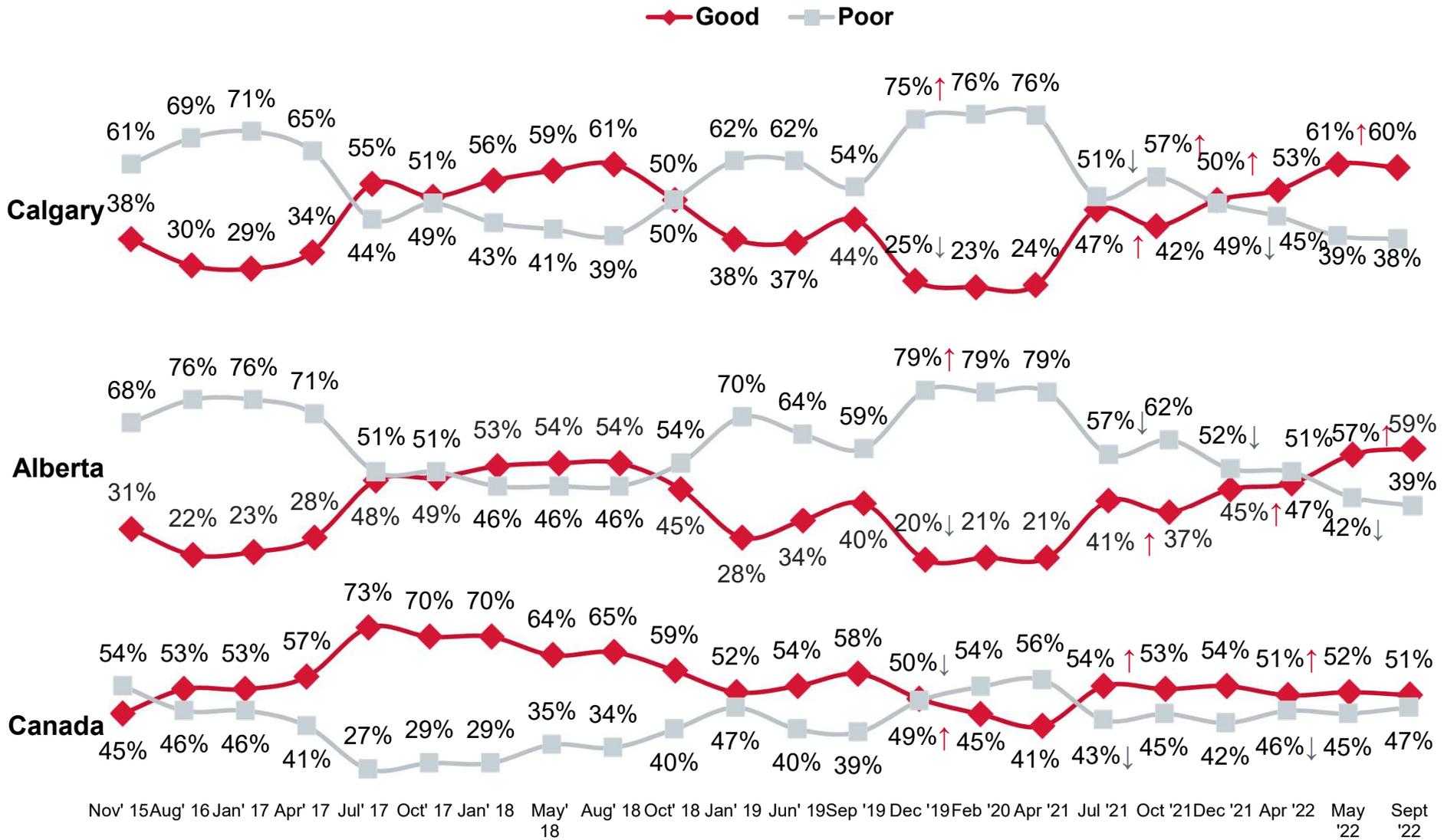
Demographic questions changed in Wave 1
Base: all respondents (n=500)

Appendix A: Tracking





Tracking Current Economic Situation

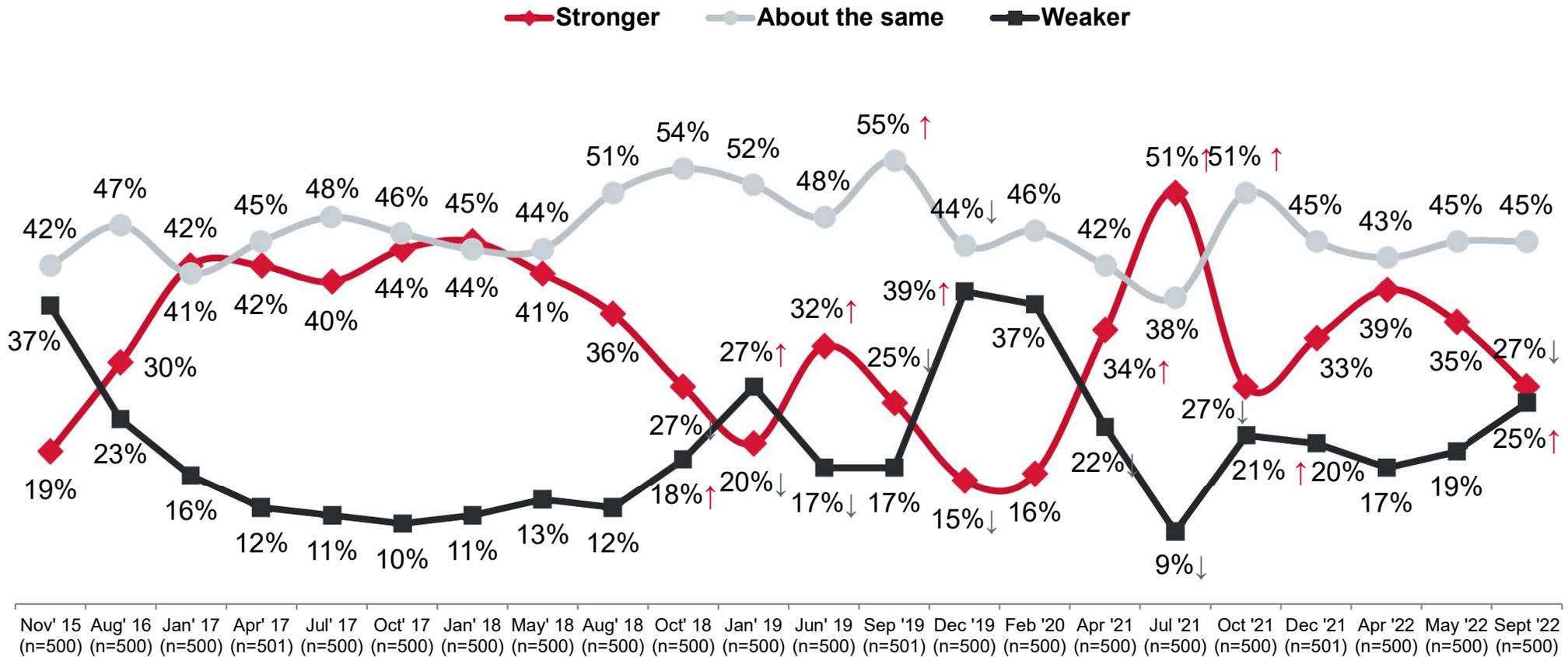


Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=500-501)

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



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 (n=500-501)

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

Tracking Perceptions of The City's Role in Economic Recovery and Investments

	Jan 2018	May 2018	Aug 2018	Oct 2018	Jan 2019	Jun 2019	Sept 2019	Dec 2019	Feb 2020	Apr 2021	Jul 2021	Oct 2021	Dec 2021	Apr 2022	May 2022	Sept 2022
It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy	92%	91%	93%	90%	89%	90%	94%	91%	92%	87%↓	89%	87%	88%	86%	89%	91%
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	76%	74%	73%	70%	67%	67%	63%	66%	68%	68%	74%	72%	65%↓	64%	66%	66%
I trust The City of Calgary to make the right decisions to help our city through this economic recovery	71%	69%	66%	65%	63%	65%	64%	59%	↑66%	63%	69%	66%	65%	62%	61%	62%
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 Apr 21									66%	67%	67%	66%	62%	63%	63%
The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery	Added in Apr 21									60%	64%	62%	58%	58%	58%	60%
The City of Calgary is making an effort to reduce the cost of local government	Added in Apr 21									40%	45%	44%	36%↓	41%	41%	39%

Q9. 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. I am referring to the Calgary municipal government, including Council and Administration.

Base: all respondents (n=500-501)
Data prior to January 2018 available on request

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

Tracking Perceptions of the Economic Recovery in Calgary

	Jan 2018	May 2018	Aug 2018	Oct 2018	Jan 2019	Jun 2019	Sept 2019	Dec 2019	Feb 2020	Apr 2021	Jul 2021	Oct 2021	Dec 2021	Apr 2022	May 2022	Sept 2022
Now is a good time for companies to be investing in Calgary	74%↓	73%	73%	73%	64%↓	70%	72%	65%↓	62%	71%↑	76%	72%	78%	80%	83%	78%
Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today	32%	35%	35%	42%	54%↑	37%↓	45%↑	65%↑	60%	49%↓	27%↓	42%↑	36%	32%	35%	39%
Now is a good time to start a new business in Calgary	46%	44%	44%	42%	30%	35%	36%	30%	31%	33%	45%↑	34%↓	44%↑	50%	52%	48%
Calgary as a city is attracting enough investment from outside of the province to help our economy	Added in Apr 2021									29%	40%↑	35%	42%↑	42%	45%	47%

Q9B. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the current economic recovery.

Base: all respondents (n=500-501)

Data prior to January 2018 available on request

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

Appendix B: Questionnaire





Questionnaire

The City of Calgary
Economic Perspectives Research: Wave 3 2022
FINAL

INTRO.

Hello, my name is (FIRST NAME) and I'm calling from Leger Research, a national public opinion research company, on behalf of The City of Calgary. Today we are conducting a survey about issues of importance to [Calgarians](#) and we'd like to include your views. Please be assured that all your responses are confidential.

The survey will take approximately 15 minutes to complete. Please be assured that your responses will remain confidential, and you will not be personally identified. Any personal information collected is under the authority of the Freedom of Information Protection and Privacy Act, Section 33(c), and is used solely for the review and improvement of City of Calgary programs and services. If you have questions about the collection or use of your information, please contact a City of Calgary Research Coordinator at 403-268-6732 and specifically mention the "2022 Economic Perspectives Survey" or send a letter to The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5.

(INTERVIEWER NOTE: 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 Economic Perspectives Survey." City Staff would be happy to address your concerns.)

(IF ASKED: The survey will take approximately 15 minutes)

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

QS7

[BASE = CELL SAMPLE ONLY]
[SINGLE MENTION]
[LIST ORDER: In order]

Are you 18 years of age or older?

RESPONDENT/INTERVIEWER INSTRUCTION: (ONLY ONE MENTION POSSIBLE)

Label	Value	Notes
Yes	1	CONTINUE
No. May I please speak with someone who is?	2	SKIP BACK TO INTRO.
No. Not qualified / available	3	THANK & TERMINATE

QSEX

[PROGRAMMER NOTES: TRACK GENDER QUOTAS]

Record Gender (DO NOT ASK)

RESPONDENT/INTERVIEWER INSTRUCTION: (DO NOT ASK; PICK BASED ON VOICE)

Label	Value	Notes
Male	1	
Female	2	

SCREENERS

[SINGLE MENTION]
[LIST ORDER: In order]

QS4.

[PROGRAMMER NOTES: TRACK AGE QUOTAS]

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

- 01 18 to 19 ~~YRS~~
- 02 20 to 24 ~~YRS~~
- 03 25 to 34 ~~YRS~~
- 04 35 to 44 ~~YRS~~
- 05 45 to 54 ~~YRS~~
- 06 55 to 64 ~~YRS~~
- 07 65 to 74 ~~YRS~~
- 08 75 and older
- 99 Refused [DO NOT READ]



ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

Q5I

[PROGRAMMER NOTES: TRACK QUADRANT QUOTAS]

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



RESPONDENT/INTERVIEWER INSTRUCTION: (WAIT FOR RESPONSE – READ LIST TO CLARIFY IF NEEDED)

Label	Value	Notes
Southwest	1	
Southeast	2	
Northwest	3	
Northeast	4	
Don't know / Refusal (DO NOT READ)	9	THANK & TERMINATE

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

A. 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?

RECORD NUMBER [RANGE 1-10]

- (Q6C) How would you describe the current economic situation in [INSERT ITEM]? Is it very good, somewhat good, somewhat bad or very bad? How about...?

[ITEMS] [RANDOMIZE]

- Canada
- Alberta
- 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?

- Much stronger
- Somewhat stronger
- About the same
- Somewhat weaker
- Much weaker
- Don't know / Refusal

- 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. I am referring to the Calgary municipal government, including Council and Administration.

[ITEMS] [ROTATE]

- (Q9B) 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
- (Q9C) I trust The City of Calgary to make the right decisions to help our city through this economic recovery
- (Q9I) I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities
- (Q9D) It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy
- (Q9J) The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery
- (Q9K) The City of Calgary is making an effort to reduce the cost of local government

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know / Refusal (Do not read)



ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

5. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the current economic recovery.

[ITEMS] [ROTATE]

- A. (Q9E) Now is a good time to start a new business in Calgary
- B. (Q9F) Now is a good time for companies to be investing in Calgary
- C. (Q9G) Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today
- D. (Q9L) Calgary as a city is attracting enough investment from outside of the province to help our economy

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know / Refusal (Do not read)

B. PERSPECTIVES OF TAX & USER FEES

Slightly changing topics now, I'd like to focus on some questions about property tax.

In Calgary, property tax dollars are divided between The City and the Alberta provincial government. The City collects provincial property tax on behalf of the provincial government and transfers it to them annually. Approximately 60 per cent of property tax collected in Calgary is invested in City services and programs, while the remaining 40 per cent goes to the Government of Alberta.

6. (PT1) Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
- Yes
 - No
7. (PT2) Were you aware that approximately 40 per cent of taxes The City collects is transferred to the province?
- Yes
 - No

As you may know, many types of services delivered by The City are funded in different ways. Some are through municipal property tax, some through user and service fees, and some through a combination of both tax and fees.

8. (PT3) Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?
- Yes
 - No

PAGE 5 OF 12

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

C. PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

9. (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? I am referring to the Calgary municipal government, including Council and Administration.

- Very good time
- Somewhat good time
- Somewhat bad time
- Very bad time
- Don't know / Refusal

10. (II2A-II2E) The City of Calgary prioritizes investment in infrastructure projects on an ongoing basis. Please indicate the level of importance you would place on the following types of projects.

[ITEMS] [ROTATE]

- Projects that will be used for multiple purposes
- 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

- Very important
- Somewhat important
- Not very important
- Not at all important
- Don't know / Refusal (DO NOT READ)

One of the challenges when it comes to large infrastructure projects planned by The City is the lifespan of a finished project. Usage, weather, general wear and tear and other factors mean some projects need more maintenance and upkeep or need to be replaced sooner than others.

11. (II3) Thinking about infrastructure planning and investment, should The City invest more up front on infrastructure projects if it means reduced maintenance costs and extended timelines for replacement?
- Yes
 - No
 - I don't know

D. PERSPECTIVES OF TRUST AND REPUTATION

PAGE 6 OF 12



ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

12. (TR1) Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

- Trust a great deal
- Trust a little
- Neutral
- Distrust a little
- Distrust a great deal
- Don't know

City Council is made up of elected officials who are the legislative body that govern The City. While City Administration is made up of non-elected employees at The City who are responsible for the management and running of local services.

13. (TR2) Taking everything into account, how satisfied or dissatisfied are you with the way the following groups are going about running our City?

[ITEMS] [ROTATE]

- A. The City of Calgary, including (Council and Administration) as a whole
- B. Calgary's City Council, EXCLUDING City Administration
- C. Calgary's City Administration, EXCLUDING Council

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know / Refuse (DO NOT READ)

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

E. DEMOGRAPHICS

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.

QD1. In what year were you born?

RECORD YEAR (RANGE 1900 TO 2004)
(DO NOT READ) Refuse / Prefer not to answer

QD2. How many people, including yourself, live in your household?

RECORD NUMBER (MIN 1, MAX 9999)
(DO NOT READ) Refuse / Prefer not to answer

[IF 2 OR MORE IN QD2, CONTINUE - ELSE SKIP TO QD5]

QD3. Do you have any children under the age of 18 living in your household?

- Yes
- No
- (DO NOT READ) Prefer not to answer / Refusal

[IF AGE AT QS4 = 65+ SKIP NEXT]

QD4. Is there anyone aged 65 years or older living in your household?

- Yes
- No
- (DO NOT READ) Prefer not to answer / Refusal

QD5. Do you own or rent your current place of residence?

- 1 Own
- 2 Rent
- 3 (DO NOT READ) Other (VOLUNTEERED) (specify)

QD5A. Are you either primarily or jointly responsible for paying property taxes or rent in your household?

- 1 Yes
- 2 No
- 9 Don't know / Refusal (DO NOT READ)

QD5B I am going to read you a list of different types of residential dwellings. Please tell me which of these best describes the type of dwelling you live in: (READ LIST)

Single detached house (INTERVIEWER NOTE: This includes bungalow, split level, 2-story, suite in a house, etc.)



ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

Duplex, triplex or fourplex
Townhouse or rowhouse
Apartment or apartment-style condominium
Another type of multi-unit complex (INTERVIEWER NOTE: This includes mobile home park, trailer park, seniors home, etc.)
(DO NOT READ) Other (Specify)

QD6. How many years have you lived in Calgary? (IF LESS THAN 1 YEAR ENTER 0)

RECORD NUMBER (RANGE 0 TO 100)
999 Don't know / Refusal

QD7. What is the highest level of schooling that you have obtained? (READ LIST)

- 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 Completed a university certificate, diploma or degree
- 99 Don't know / Refusal (DO NOT READ)

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) (INTERVIEWER: BEST two that describe your status).

- 1 Full time employed or self-employed (IF ASKED, 30 hours or more per week)
- 2 Part time employed or self-employed (IF ASKED, 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 Other (DO NOT READ) (SPECIFY) _____
- 99 Don't know / refuse (DO NOT READ)

[ASK QD9 IF QD8=Full time or Part Time]

QD9. Do you own or operate a business in Calgary? IF YES: Do you (READ FIRST THREE)?

- 1 Own and operate a business
- 2 Own a business
- 3 Operate a business
- 4 No
- 99 (DO NOT READ) Refuse / Prefer not to answer

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

[ASK ALL]

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 – ACCEPT RESPONSE BEFORE FINISHING LIST)

- 1 Less than \$90,000
- 2 \$90,000 to just under \$150,000
- 3 \$150,000 and over
- 99 [DO NOT READ] Don't Know/Refused

[IF "Less than \$90,000" ASK QD10A. IF "\$90,000 to just under \$150,000" ASK QD10B. IF "\$150,000 and over" ASK QD10C. IF DK/REF, GO TO QD11.]

QD10A. Would that be... (READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)

- 1 Less than \$30,000
- 2 \$30,000 to just under \$45,000
- 3 \$45,000 to just under \$60,000
- 4 \$60,000 to just under \$75,000
- 5 \$75,000 to just under \$90,000
- 99 [DO NOT READ] Don't Know/Refused

QD10B. Would that be... (READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)

- 1 \$90,000 to just under \$105,000
- 2 \$105,000 to just under \$120,000
- 3 \$120,000 to just under \$135,000
- 4 \$135,000 to just under \$150,000
- 99 [DO NOT READ] Don't Know/Refused

QD10C. Would that be... (READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)

- 1 \$150,000 to just under \$175,000
- 2 \$175,000 to just under \$200,000
- 3 \$200,000 to just under \$225,000
- 4 \$225,000 to just under \$250,000
- 5 \$250,000 and over
- 99 [DO NOT READ] Don't Know/Refused

QD11. What is your gender? (IF NECESSARY – DO NOT READ EXCEPT TO CLARIFY: 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.)

(DO NOT READ LIST EXCEPT TO CLARIFY)

- Female
- Male
- Prefer to self-describe (specify)
- Refused/prefer not to say



Questionnaire

ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

QD12. We want to ensure our research is reflective of all Calgarians. Were you born in Canada?

- Yes
- No
- (DO NOT READ) Refuse / Prefer not to answer

[IF YES OR DK/REF AT D12, SKIP TO QD15, ELSE CONTINUE]

QD13. How old were you when you left your country of birth? (READ LIST)

- Under the age of 18
- 18-49
- 50 or older
- (DO NOT READ) Refuse / Prefer not to answer

QD14. How recently did you arrive in Canada? (READ LIST)

- Within the past five years
- More than five years ago
- (DO NOT READ) Refuse / Prefer not to answer

QD15. Are you Indigenous - that is, First Nations, Métis, or Inuit? (Multiple response)

- Yes - First Nations
- Yes - Métis
- Yes - Inuit
- Yes - Prefer to self-describe (specify)
- No
- (DO NOT READ) Refuse / Prefer not to answer

QD16. Do you consider yourself a racialized person? [Interviewer note if asked: Racialized person means someone, other than Indigenous people, who are non-Caucasian in race or non-white in colour.]

- Yes
- No
- Prefer to self-describe (specify)
- (DO NOT READ) Refuse / Prefer not to answer

QD17. Do you or a member of your household have a disability? (Multiple response) (DO NOT READ LIST)

- Yes – myself
- Yes – someone in my household
- No

QD18. LGBTQ Do you consider yourself to be a member of the LGBTQ2S+ community? (ONLY IF ASKED: LGBTQ2S STANDS FOR LESBIAN, GAY, BI-SEXUAL, TRANSGENDER, QUEER OR QUESTIONING, OR TWO SPIRIT)

- Yes
- No

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ECONOMIC PERSPECTIVES SURVEY – Wave 3 2022 (FINAL)

QD19. 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.

- Yes
- No

[IF "YES" ASK Q38ax and Q38bx, ELSE SKIP TO CLOSE]

QD20. Could I please have an email address where we can contact you?

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT]

QD21. 38bx. Could I please have your first and last name and confirm your telephone number?

[RECORD FIRST NAME, LAST NAME AND CONFIRM TELEPHONE NUMBER]

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

PAGE 12 OF 12

The logo for the City of Calgary, featuring the word "Calgary" in white text on a red rectangular background.

Contact

Krista Ring
Manager of Web, Research and Projects
The City of Calgary
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Krista.Ring@Calgary.ca