

Calgary



2024 Economic Perspectives Research

Final Report

April 2024

Prepared by:



ADVANIS



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Background and methodology

Background

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

Methodology

The telephone survey was conducted by Advanis from March 19th to March 26th, 2024 with 509 Calgarians. The average time to complete the survey was 16 minutes.

The survey was completed using numbers from both landlines (23%) and cell phones (77%) to obtain a random and statistically representative sample of Calgarians. The margin of error (MOE) for the total sample of n=509 is ± 4.3 percentage points, 19 times out of 20 (though larger among subgroups of the total).

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

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

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



Highlights at a glance

QUALITY OF LIFE & ECONOMY



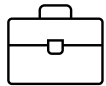
59% Rate the **quality of life** in Calgary as “good”
(-9%pt)↓



48% Rate the **economy** in Calgary as “good”
(-9%pt)↓



71% Expect the economy in Calgary to be **stronger or about the same** in the next six months
(+0%pt)



50% Expect Calgary’s **unemployment rate** to be worse six months from now
(-1%pt)

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



44% Trust The City to make the right decisions to **help the city through its economic recovery**
(-9%pt)↓



41% Agree The City is taking appropriate measures to **assist the economic recovery**
(-10%pt)↓

INFRASTRUCTURE INVESTMENT



72% Thinks it is a good time for The City of Calgary to be investing in new projects
(-2%pt)

AWARENESS OF ECONOMY, TAXES, AND USER FEES



79%* Have read, seen, or heard anything about Calgary’s **economy or economic conditions** in the past three months



62% Are aware that The City **collects property tax on behalf of the Province**
(+8%pt)↑



44% Are aware **thirty-five per cent** of taxes collected by The City are **transferred to the Province**
(+7%pt)↑

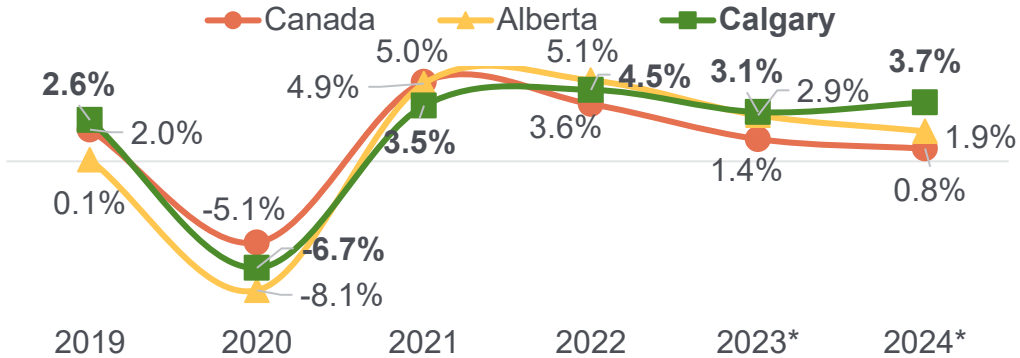
↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave

* New question this wave.



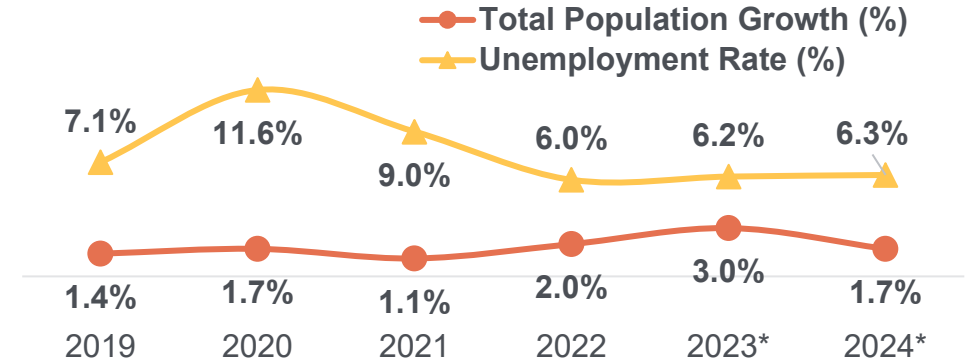
Survey context: Economic Indicators

REAL GROSS DOMESTIC PRODUCT GROWTH



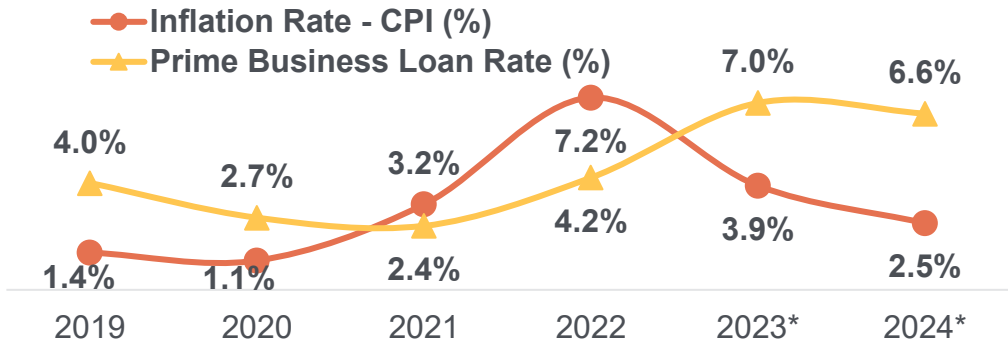
Real GDP growth was projected to decrease in both 2023 and 2024 at the provincial and federal levels but increase at the municipal level in 2024. Just 16% of Calgarians expect the economy to be stronger in six months.

CALGARY INDICATORS



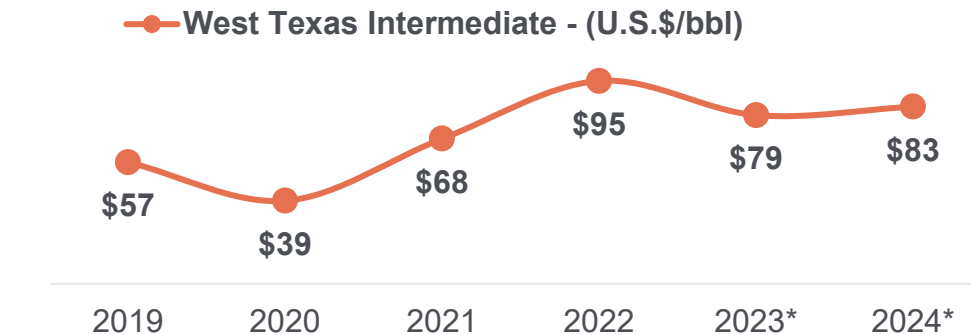
Despite population growth being projected to slow and the unemployment rate being projected to remain stable in 2024, one-half of Calgarians expect unemployment to get worse in the next six months (unchanged from last quarter).

INFLATION AND INTEREST RATES



While the forecasted inflation rate is projected to decline again and forecasted interest rates are projected to decrease, almost one-fifth of Calgarians that have read, seen, or heard about Calgary's economy mention they were informed about the high cost of living and/or inflation.

PRICE OF OIL



Although oil prices (WTI) are expected to rise in 2024, 84% of Calgarians believe it is important that Calgary find more of a balance between oil and gas and other types of business in its local economy.

Source: Calgary & Region Economic Outlook 2023-2028: Fall 2023 (<https://www.calgary.ca/research/economic-outlook.html>)

* 2023/2024 Forecast



Survey context: March 2024

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.

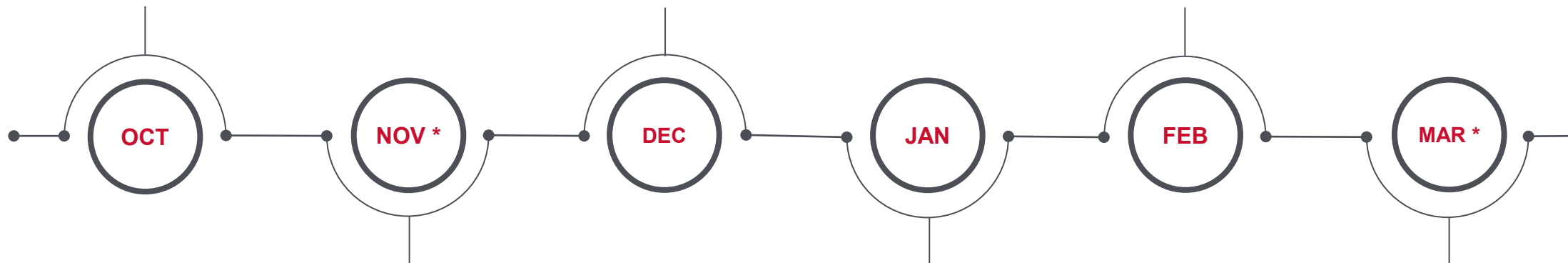
October 25: Bank of Canada holds policy interest rate steady (target at 5.00%).

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

Dec 12: Indigenous Economic Contribution Study is released, and it reports that the Indigenous economy generated a total GDP of \$1.5 billion in 2021 in The City of Calgary. The portion accounts for 1.2% of Calgary's total GDP.

February 20: Statistics Canada reports that in January, Alberta's and Calgary's inflation rose to 3.4% and 4.1% respectively, in contrast with Canada's inflation rate, which fell to 2.8%.

February 29: Alberta Budget 2024 is released. Calgary Economic Development reports being encouraged by the surplus of \$367 million, investment into the Alberta Heritage Fund, and the forecasted decrease in Alberta's net debt-to-GDP ratio.



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.

Jan 15: Calgary's mayor, film commissioner, and Calgary film unions meet with nine film studios and streamers (including Disney, Fox, Apple, and Netflix) in Los Angeles to reaffirm Calgary's position as a film and television city. Hollywood productions have created 2,190 jobs and contributed \$325 million to Calgary's economy since September 2022.

Jan 24: Bank of Canada holds policy interest rate steady (target at 5.00%).

March 6: Calgary Economic Region Labour Market Outlook projects shortages to continue in construction, retail trade, education and accommodation / food services.

March 11: Opportunity Calgary Investment Fund invests \$3.9 million in the Aerospace Innovations Hub over four years. AIH is managed by Innovate Calgary and is partnered with WestJet, Calgary Airport Authority, and Chapter.ai Ventures.

*** Economic Perspectives Surveys Field Dates:**

- 2023 Wave 4: November 20 to 28
- 2024 Wave 1: March 19 to March 26

Key findings

Perceptions of overall quality of life in Calgary have decreased significantly in the first quarter of 2024 after a period of stability throughout 2023.

- A slight majority (59%) of Calgarians currently rate their quality of life in Calgary as “good” (ratings of seven to ten on a ten-point scale), compared to between 68% and 71% throughout 2023.

Positive ratings of Calgary and Alberta’s economies also fell, as the majority of Calgarians no longer rate either economy as “good”.

- Perceptions of the economic situation in Calgary being “good” have dropped from a high of 64% in June of last year to 48% this quarter. Similarly, positive ratings of the economic situation in Alberta dropped from 62% to 45% over the same time period, and from 54% to 36% for the economic situation in Canada.

Despite the declines in perceptions of quality of life and the current economic situation, expectations about the future of the economy in Calgary remain stable.

- Around seven-in-ten (71%) of Calgarians anticipate the economy in Calgary to be stronger or about the same when thinking ahead six months from now, which is identical to last quarter (71%).
- Expectations about the unemployment rate in Calgary are also stable with one-half (50%) of Calgarians expecting the unemployment rate in Calgary to get worse over the next six months, which is on par with last quarter (51%).

Four-in-five Calgarians have read, seen, or heard about Calgary’s economy in the past three months.

- Among the 79% of Calgarians who read, saw, or heard anything about Calgary’s economy, the most recalled topics were related to housing, including rent and mortgages (23%), high cost of living including inflation (18%), and taxes (14%).

Key findings

Trust and confidence in The City has decreased since last quarter.

- Compared to last quarter, fewer Calgarians:
 - Trust The City to make the right decisions about building projects (51%, down from 60%);
 - Are confident that The City will work together with local businesses and other levels of government (49%, down from 61%);
 - Trust The City to make the right decisions to help their city through this economic recovery (44%, down from 53%);
 - Agree The City is taking appropriate measures to assist in Calgary's economic recovery (41%, down from 51%); and
 - Agree The City is making an effort to reduce the cost of local government (28%, down from 36%).

Despite the drop in confidence, about three-quarters of Calgarians still believe that it is a good time for The City to invest in new infrastructure projects.

- Similar to last quarter, about three-quarters (72%) of Calgarians believe it is a good time for The City to invest in new infrastructure projects, with infrastructure projects that will create jobs (55%) continuing to be considered most important, followed closely by projects that will enhance economic diversity (51%).

Awareness that The City of Calgary collects provincial property tax on behalf of the provincial government and that approximately thirty-five percent of taxes The City collects is transferred to the province is increasing.

- About three-fifths (62%) of Calgarians are aware that The City of Calgary collects provincial property tax (compared to 49% one year ago) and just over two-fifths (44%) are aware that approximately thirty-five percent of taxes The City collects is transferred to the Province (compared to 33% one year ago).



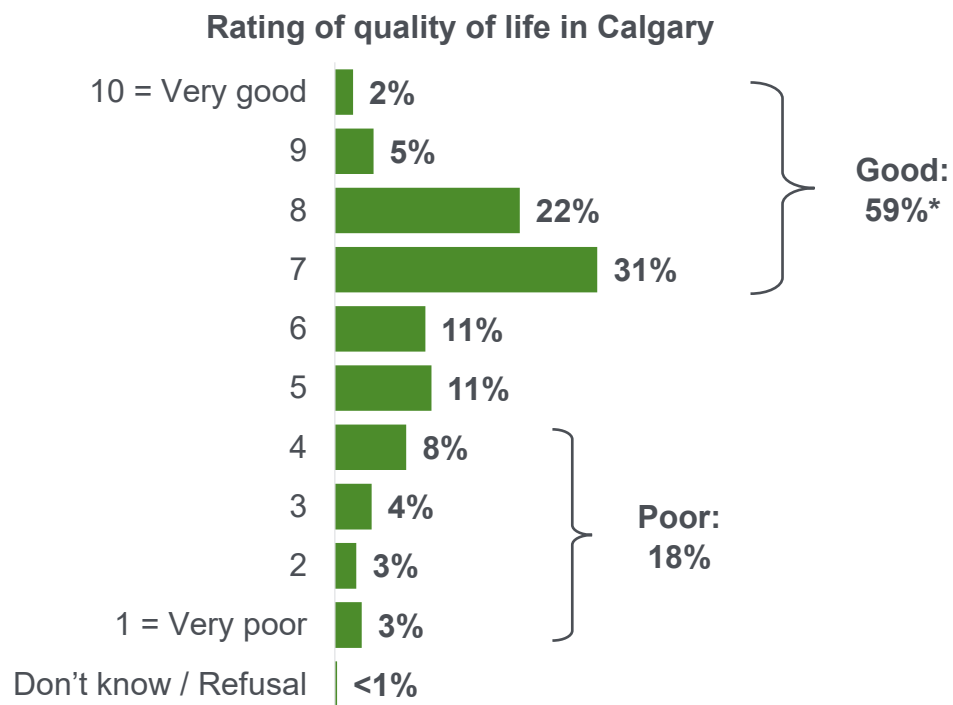
Detailed findings

Quality of life



Overall quality of life in Calgary

Three-fifths (59%) of Calgarians rate their quality of life in Calgary as “good” and about one-in-six (18%) rate it as “poor”.



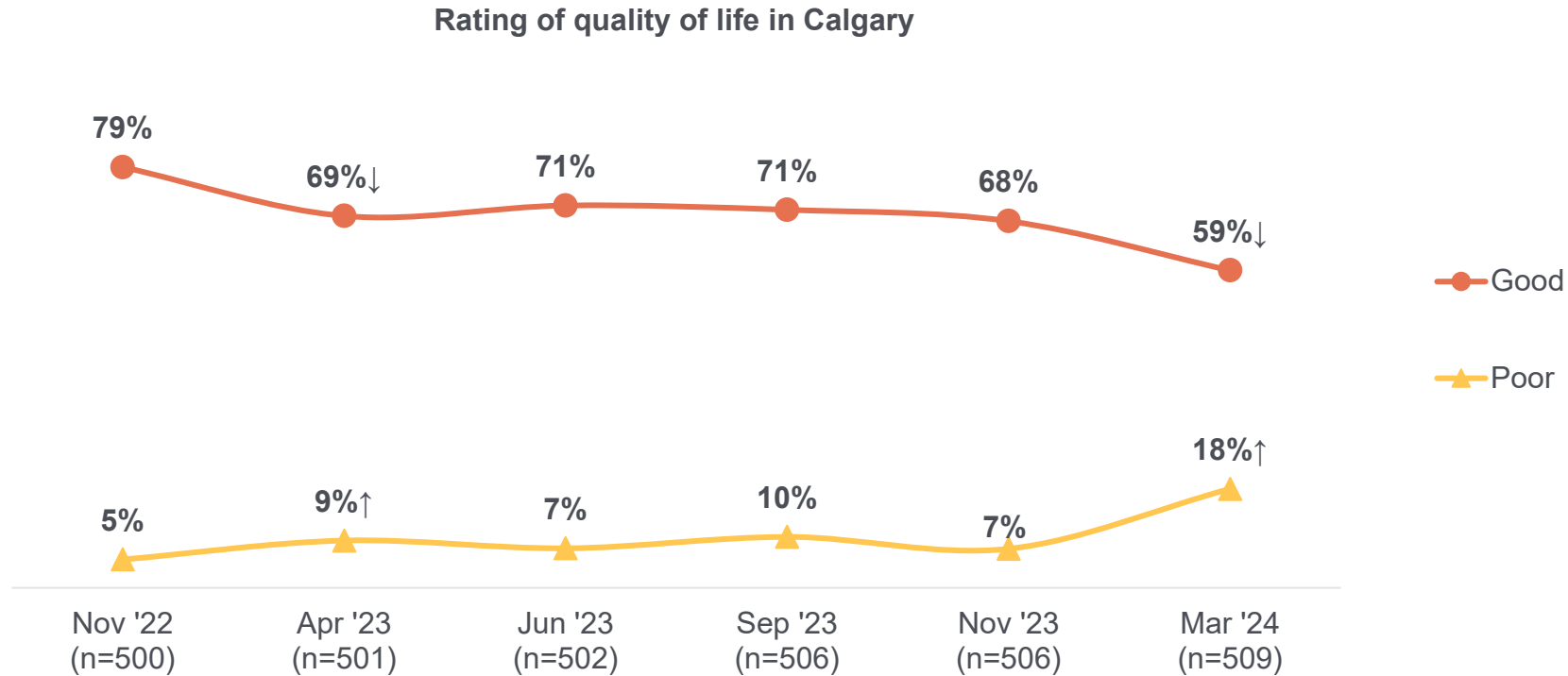
Q2. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in Calgary today?
 Base: all respondents (n=509)

* Rounding



Tracking overall quality of life in Calgary

Positive quality of life ratings notably declined since the last quarter, dropping from 68% in November 2023 to 59% this quarter.



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

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



Detailed findings

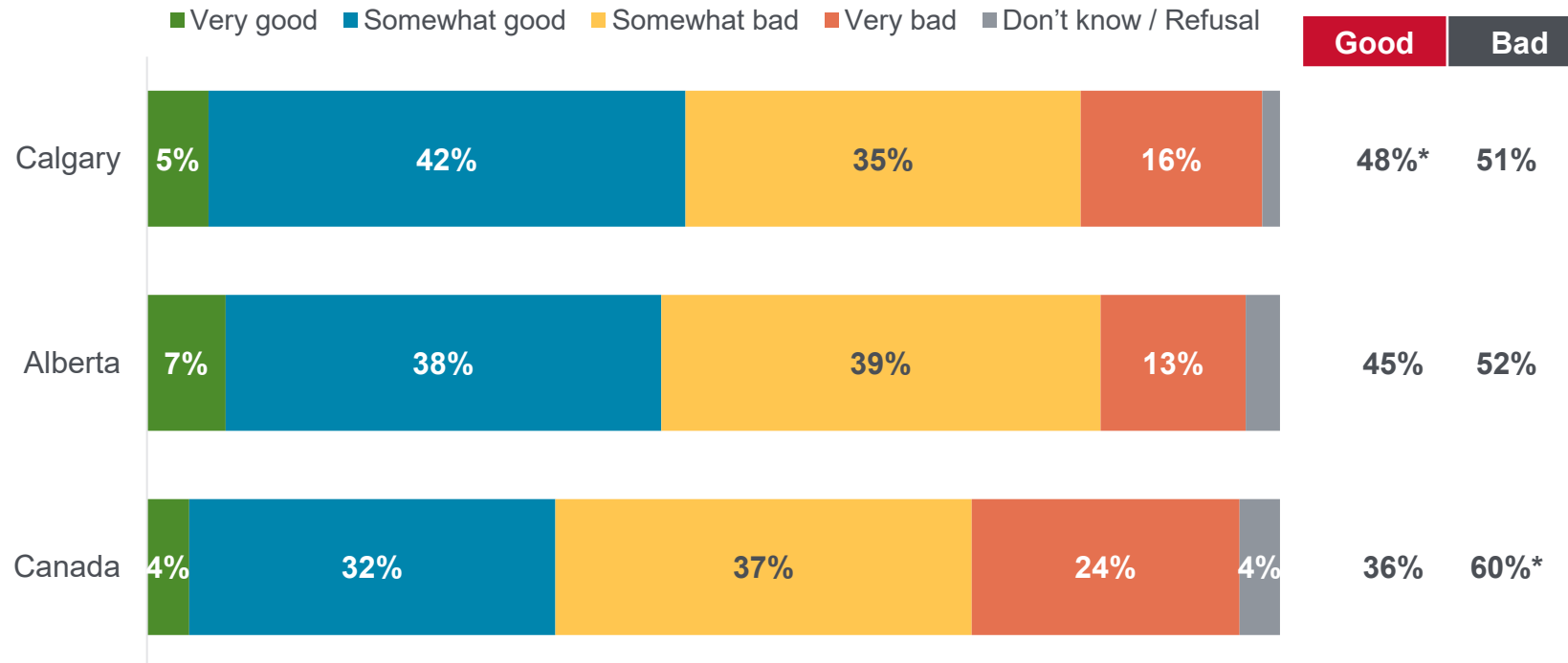
The economy and economic recovery



Current economic situation

About half of Calgarians perceive the economic situation in Calgary and Alberta as "bad" (51% and 52%, respectively) and a majority (60%) hold a negative view of the economic situation in Canada.

Rating current economic situation



Data labels <4% not shown

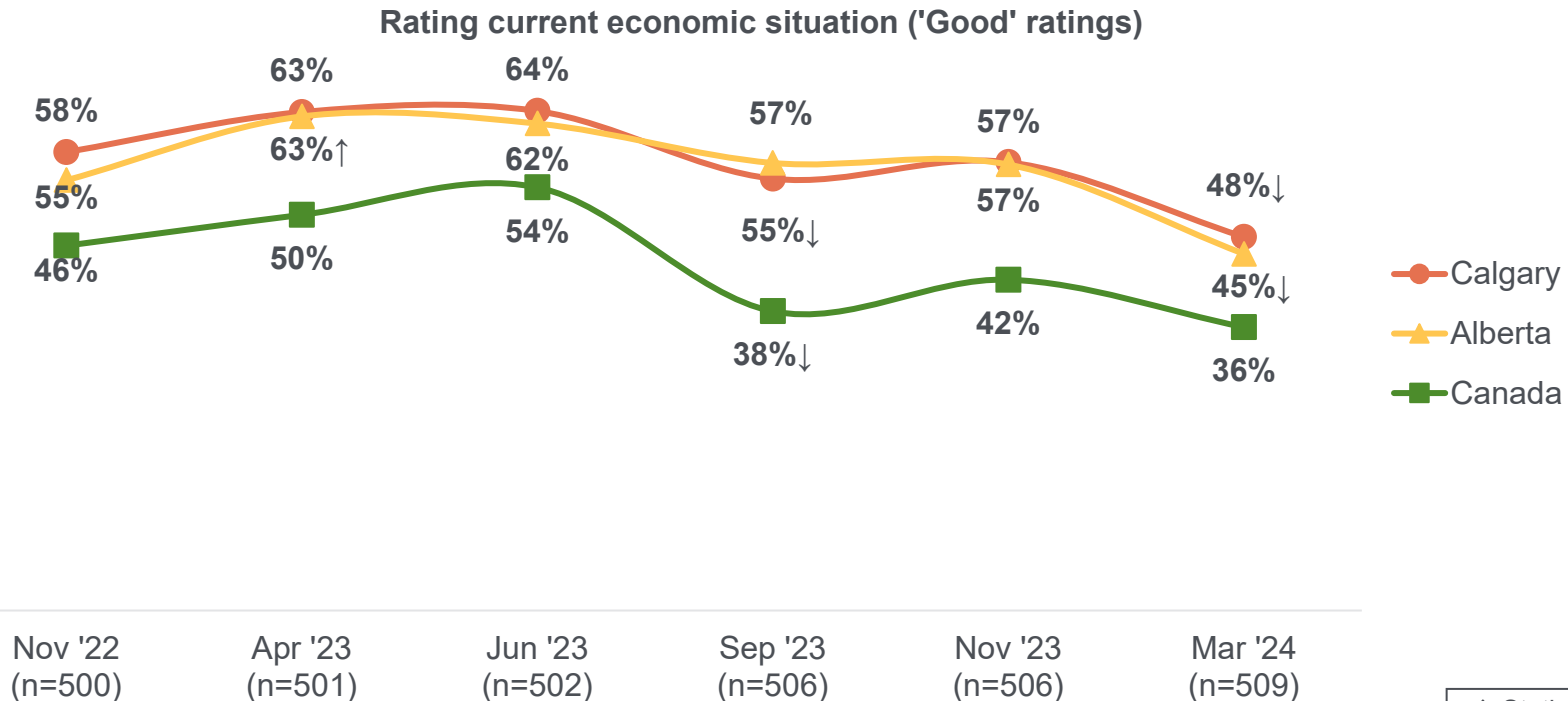
* Rounding

Q6. How would you describe the current economic situation in...?
Base: all respondents (n=509)



Tracking current economic situation

Positive ratings of the current economic situation in Calgary (48%) and Alberta (45%) have decreased significantly since the last quarter (57% each). There has also been a (albeit non-significant) decrease (from 42% to 36%) in the number of Calgarians rating the economic situation in Canada as "good".



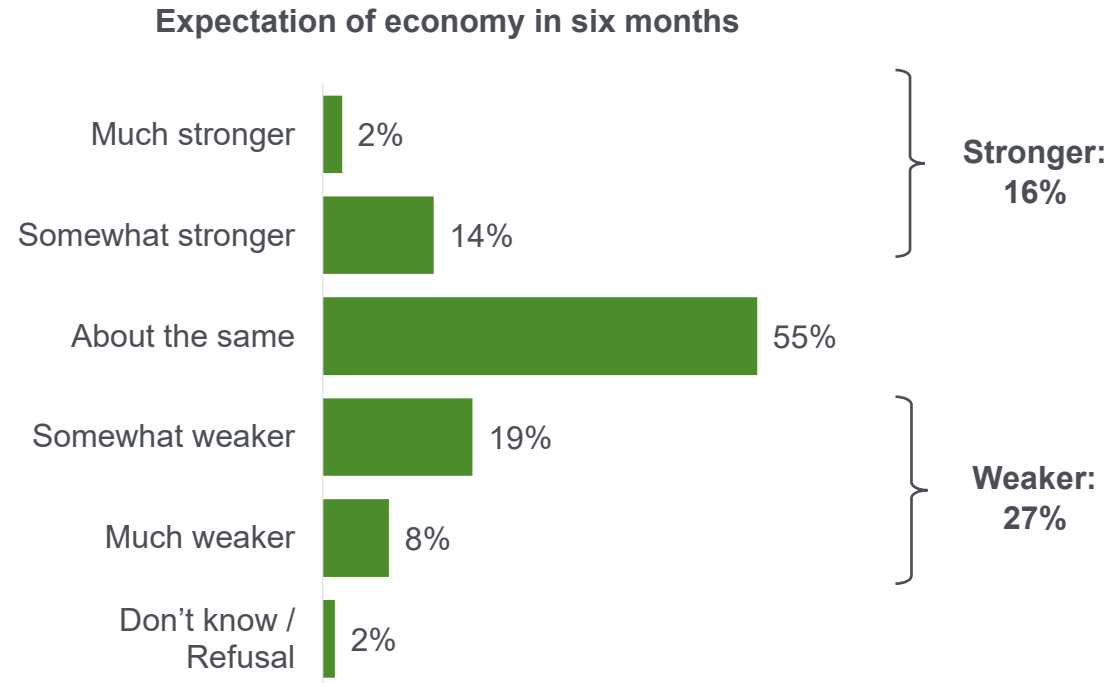
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave

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



Future of the economy in Calgary

Just over one-half (55%) of Calgarians expect the economy in Calgary to be about the same six months from now while about one-quarter (27%) expect the economy to be weaker in six months.



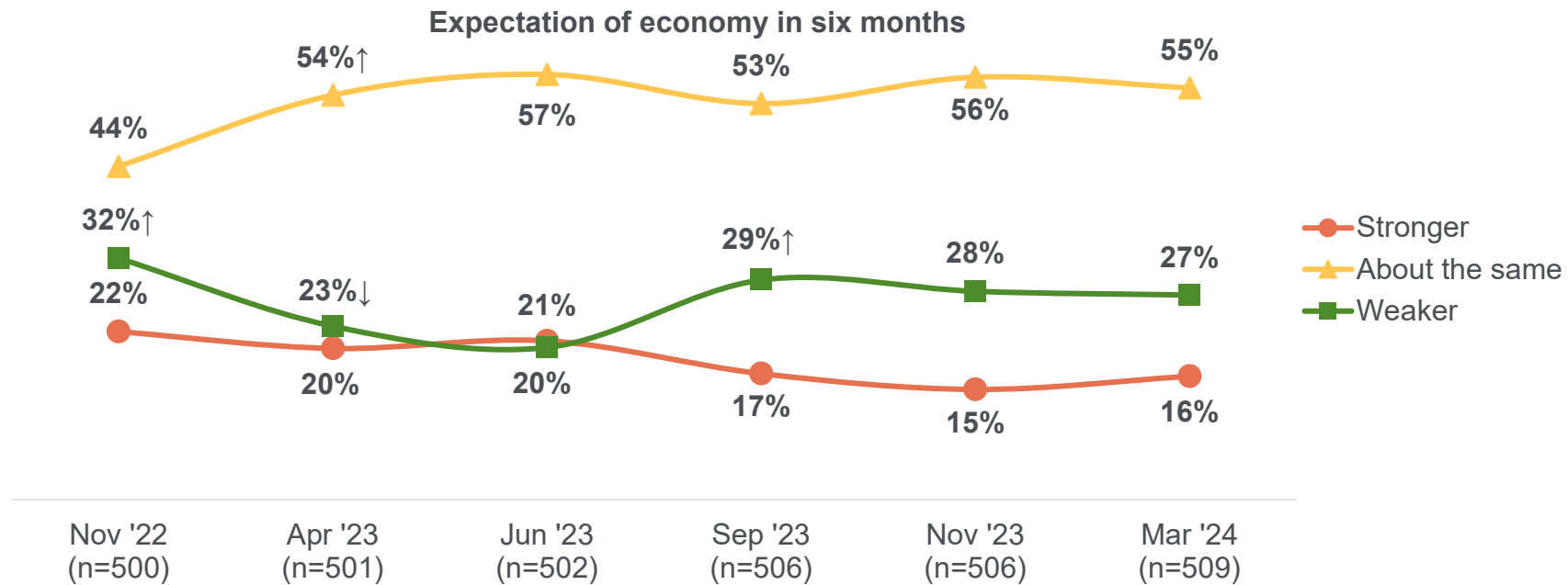
Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Base: all respondents (n=509)



Tracking future of the economy in Calgary

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



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

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

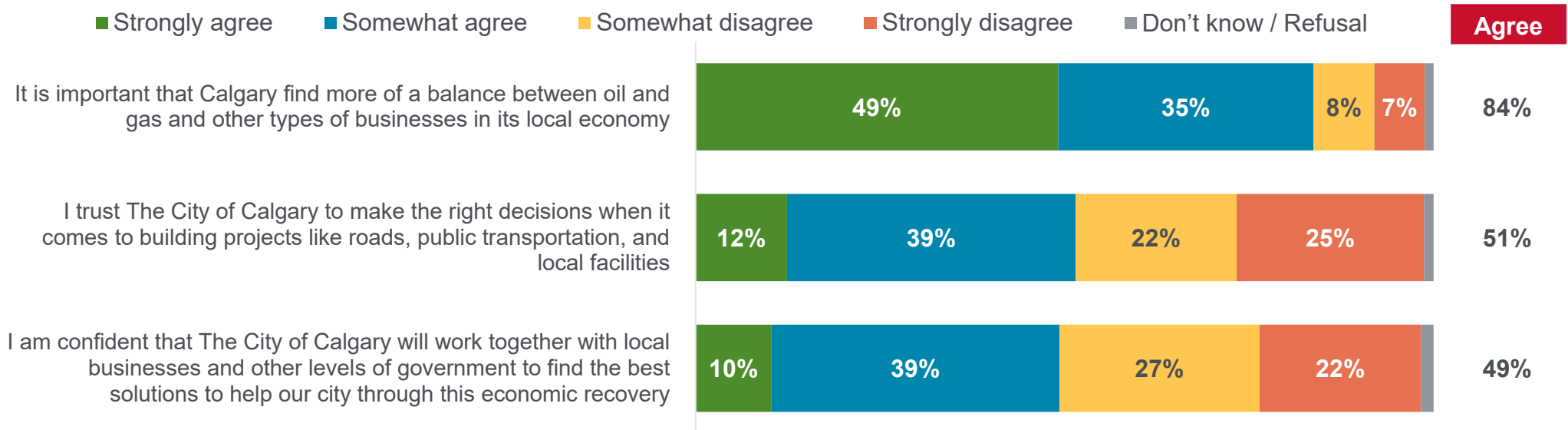
Base: all respondents



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

A large majority (84%) of Calgarians agree on the importance of Calgary achieving a better balance between its reliance on oil and gas and other types of businesses in its local economy. One-half trust The City to make appropriate decisions regarding building projects (51%) and express confidence that The City will collaborate effectively with local businesses and other levels of government to find optimal solutions for navigating through the economic recovery (49%).

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=509)

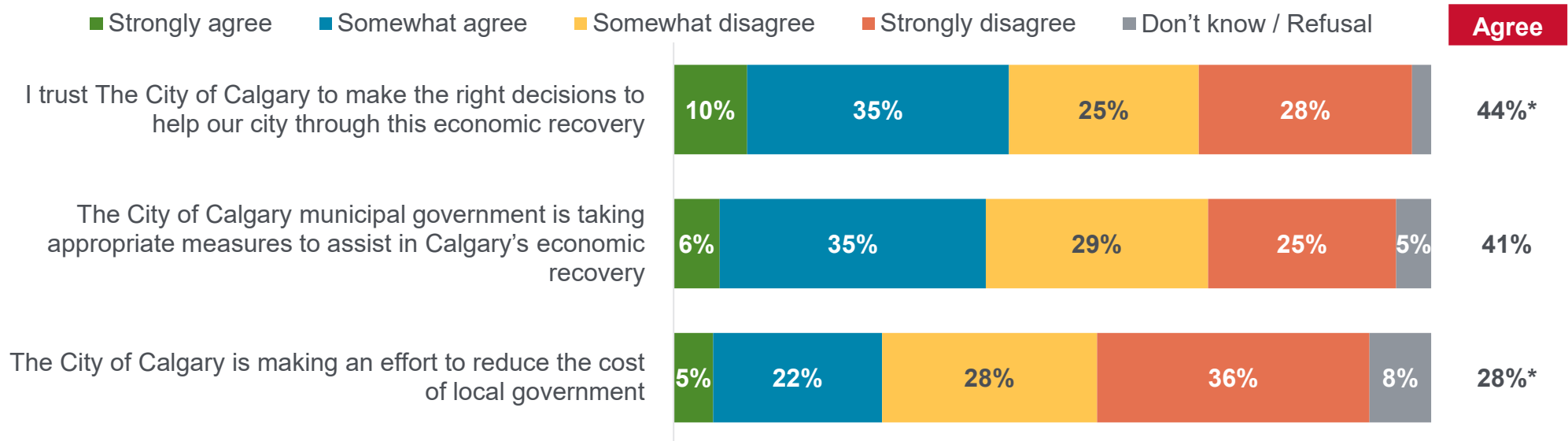
Data labels <4% not shown



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

44% of Calgarians have confidence in The City's capacity to make prudent decisions for leading The City through its economic recovery, and a similar number (41%) believe that the municipal government is actively putting appropriate measures in place to support Calgary's economic recovery. Only just over one-quarter (28%) 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



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=509)

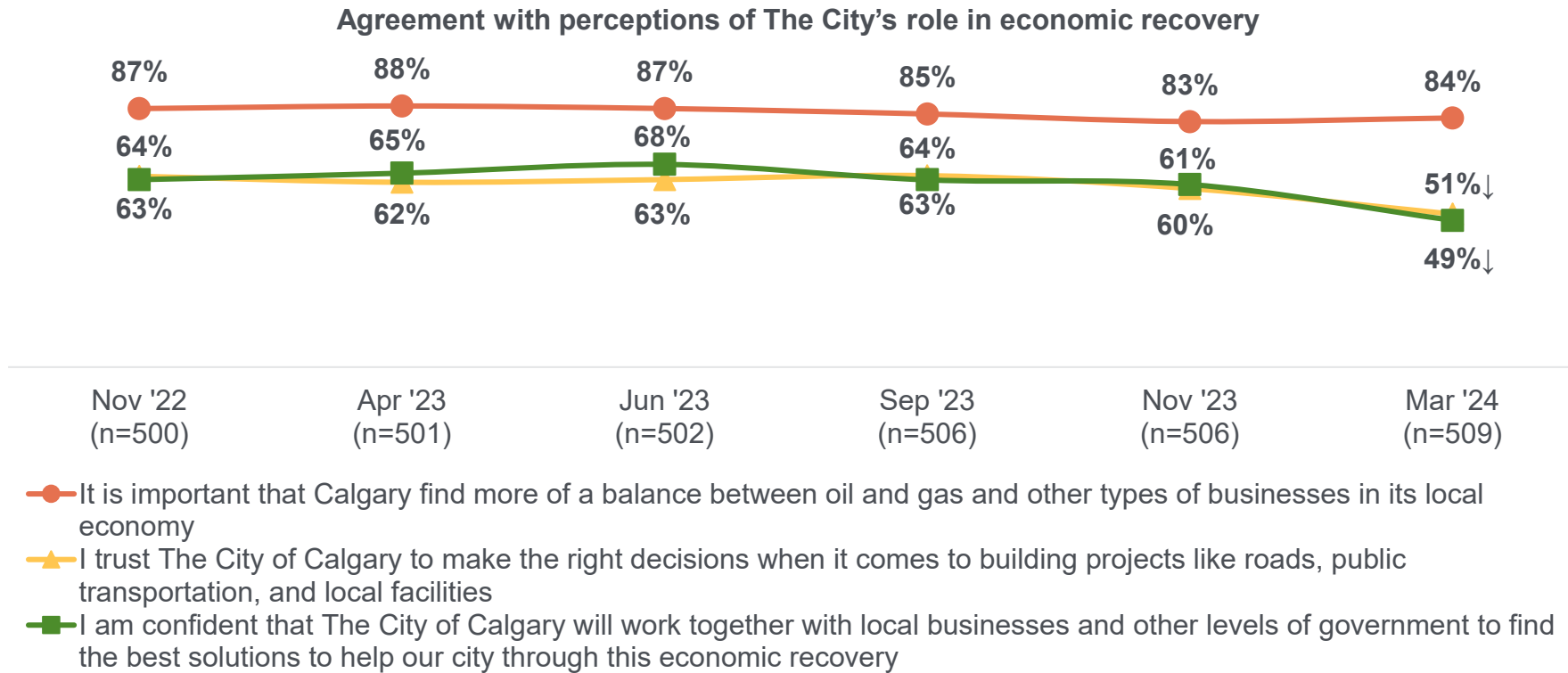
Data labels <4% not shown

* Rounding



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

Trust in The City to make the right decisions about building projects and confidence in The City's ability to work with local businesses and other levels of government have each decreased by about 10%pts since last quarter. Agreement about the importance of finding a better balance between the oil and gas sector and other types of businesses in the local economy has remained stable.



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

Base: all respondents

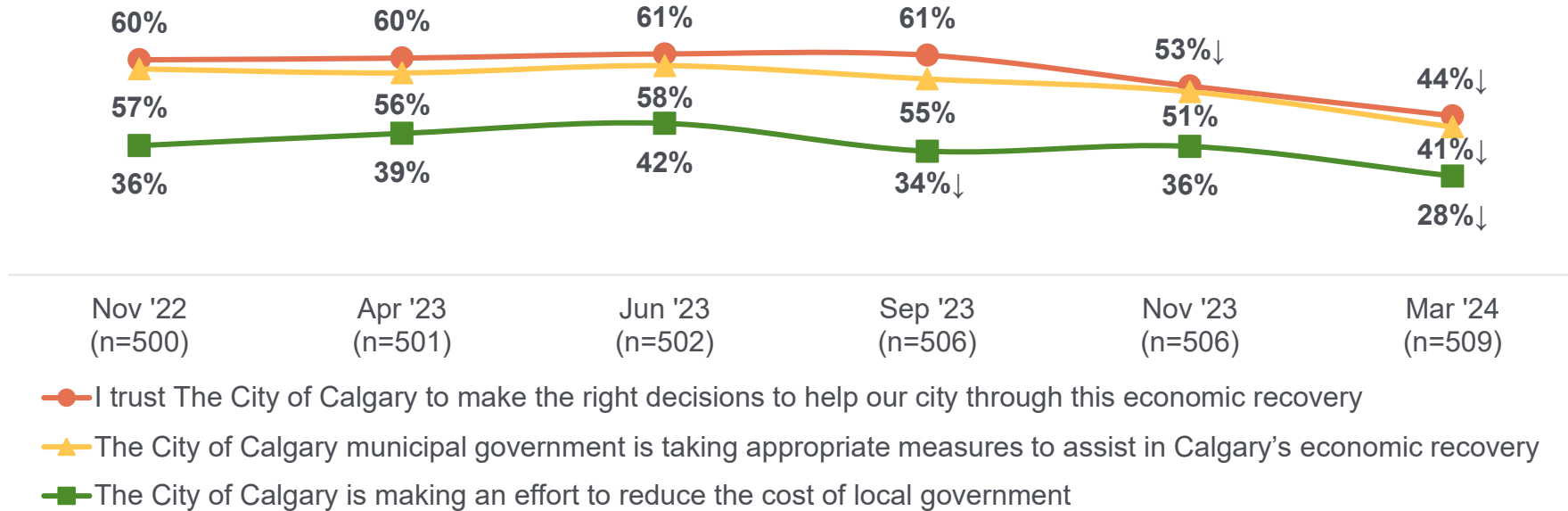
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



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

Calgarians' trust in The City's ability to make the right decisions to aid the city through this economic recovery has continued to decrease, dropping to 44% from 61% six months ago. Agreement that The City is implementing appropriate measures to assist in the economic recovery have decreased from 51% to 41% this past quarter as well, along with agreement that The City making an effort to reduce the cost of local government (from 36% to 28%).

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



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

Base: all respondents

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

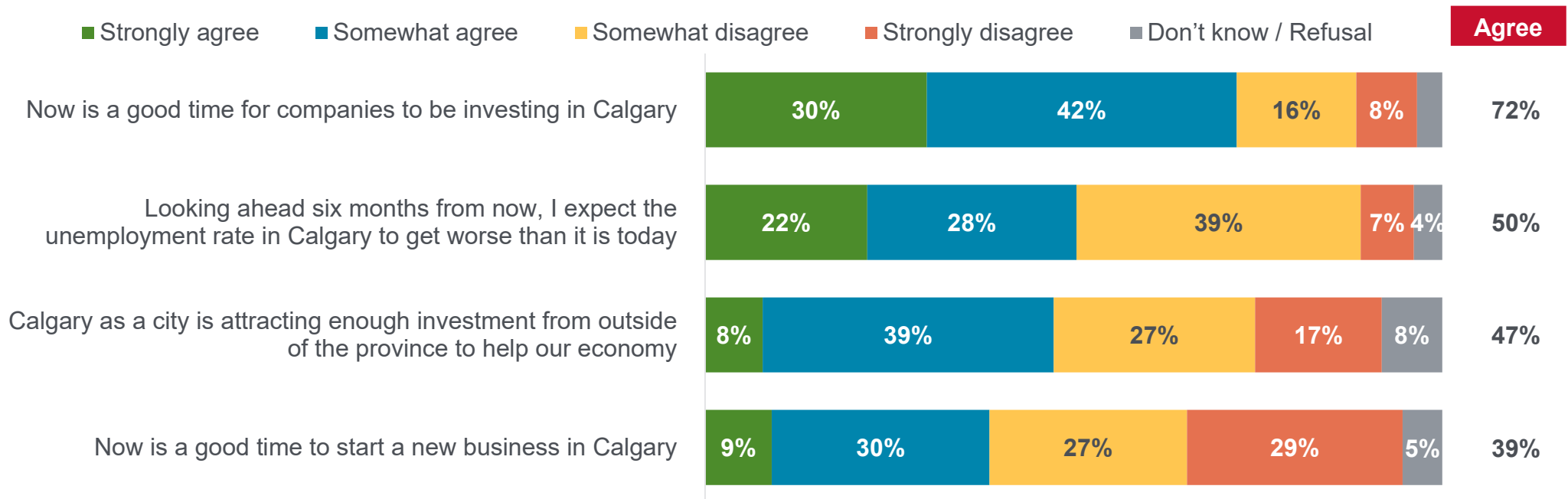


Perceptions of Calgary's economic recovery and investments

About three-quarters (72%) of Calgarians believe that now is a good time for companies to be investing in Calgary, but only two-fifths (39%) believe that now is a good time to start a new business in Calgary.

About one-half of Calgarians (50%) anticipate the unemployment rate in Calgary to worsen in six months. A similar number (47%) agree that Calgary is attracting enough out-of-province investment to help the economy.

Agreement with perceptions of Calgary's economic recovery



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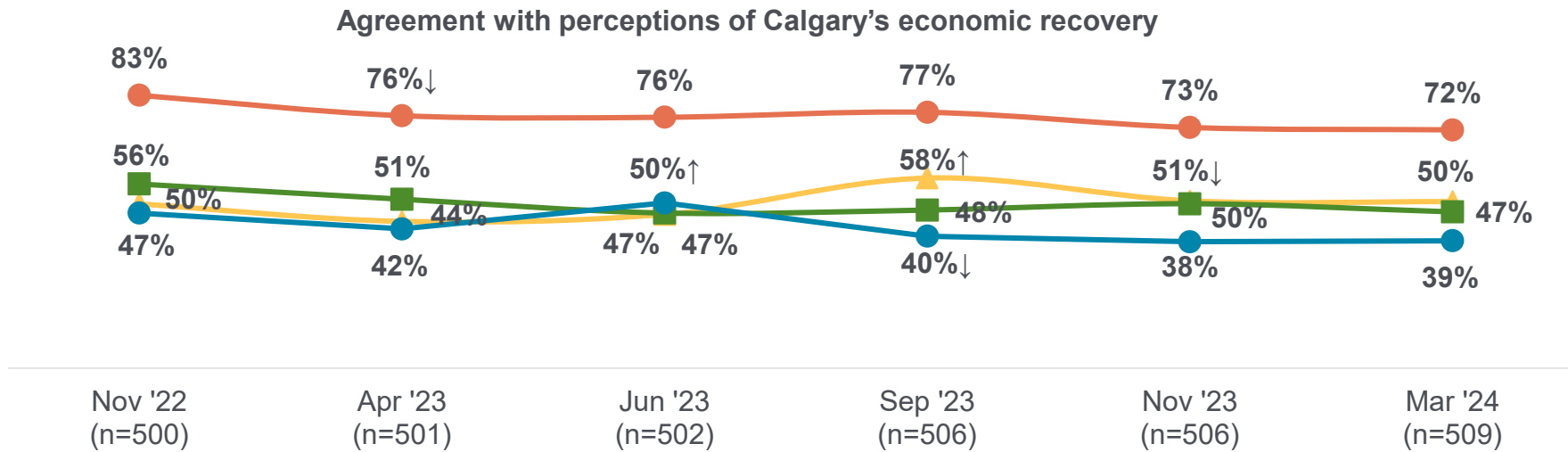
* Rounding

Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?
Base: all respondents (n=509)



Tracking perceptions of Calgary's economic recovery and investments

Perceptions of Calgary's economic recovery and investment in Calgary remain unchanged from last quarter.



- 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

Information about the economy

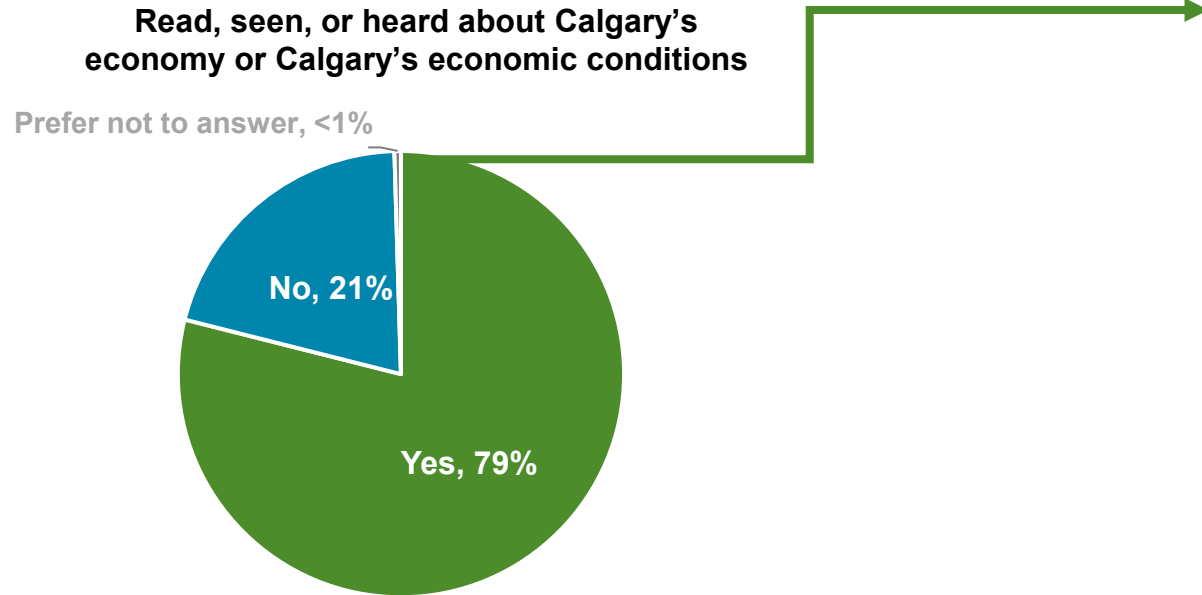
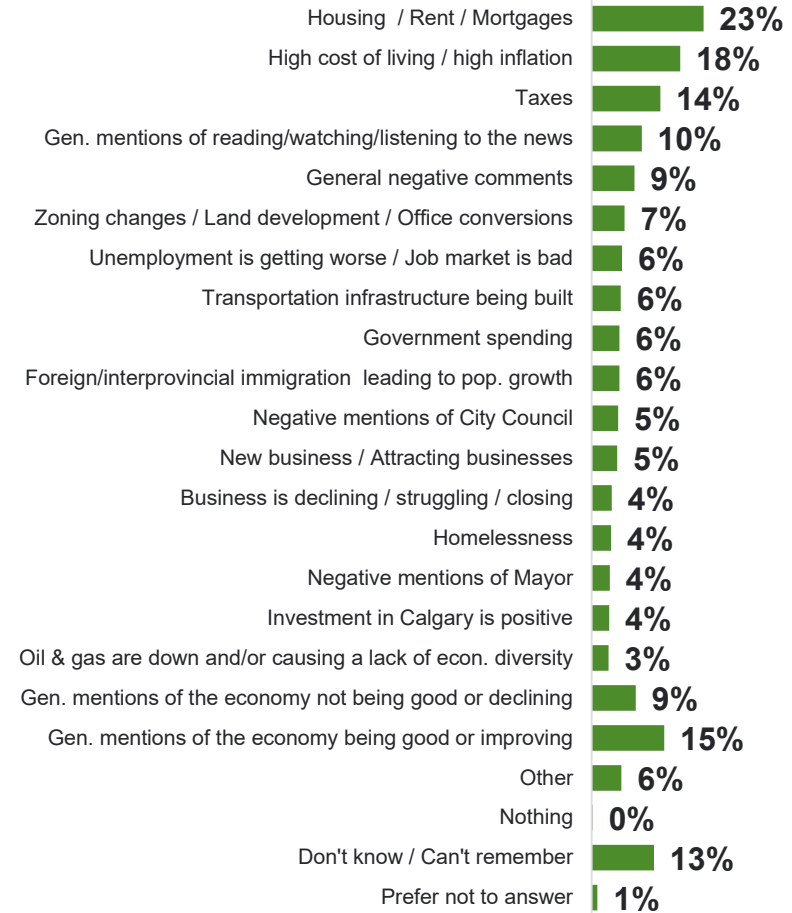


What Calgarians are hearing about the economy

Over three-quarters (79%) of Calgarians have read, seen, or heard information related to Calgary's economic conditions in the past three months.

Among them, the most recalled topics were related to housing, rent, or mortgages (23%), Calgary's high cost of living and inflation (18%), and taxes (14%).

What did you read / see / hear?



CM1. Thinking back over the past 3 months, have you read, seen, or heard anything about Calgary's economy or Calgary's economic conditions?

CM2. And what exactly do you remember reading, seeing, or hearing?

Base: all respondents (n=509) / respondents who have read, see, or heard anything about Calgary's economy or Calgary's economic conditions in the past 3 months (n=399)

<3% mentions not shown



Detailed findings

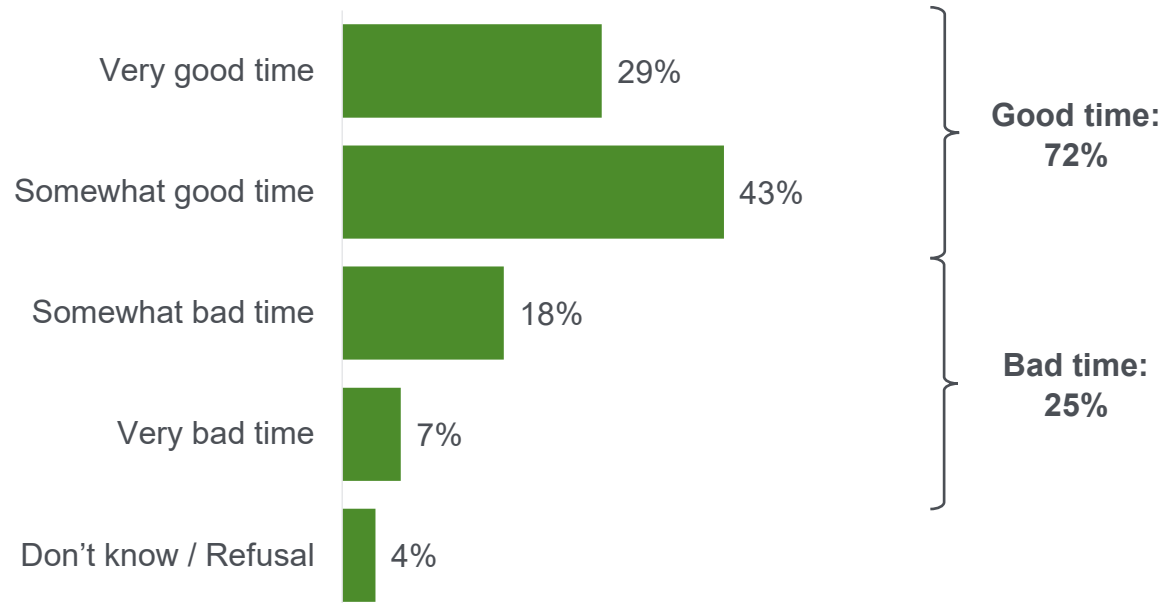
Infrastructure investment



Infrastructure investment

Just under three-quarters (72%) of Calgarians believe now 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



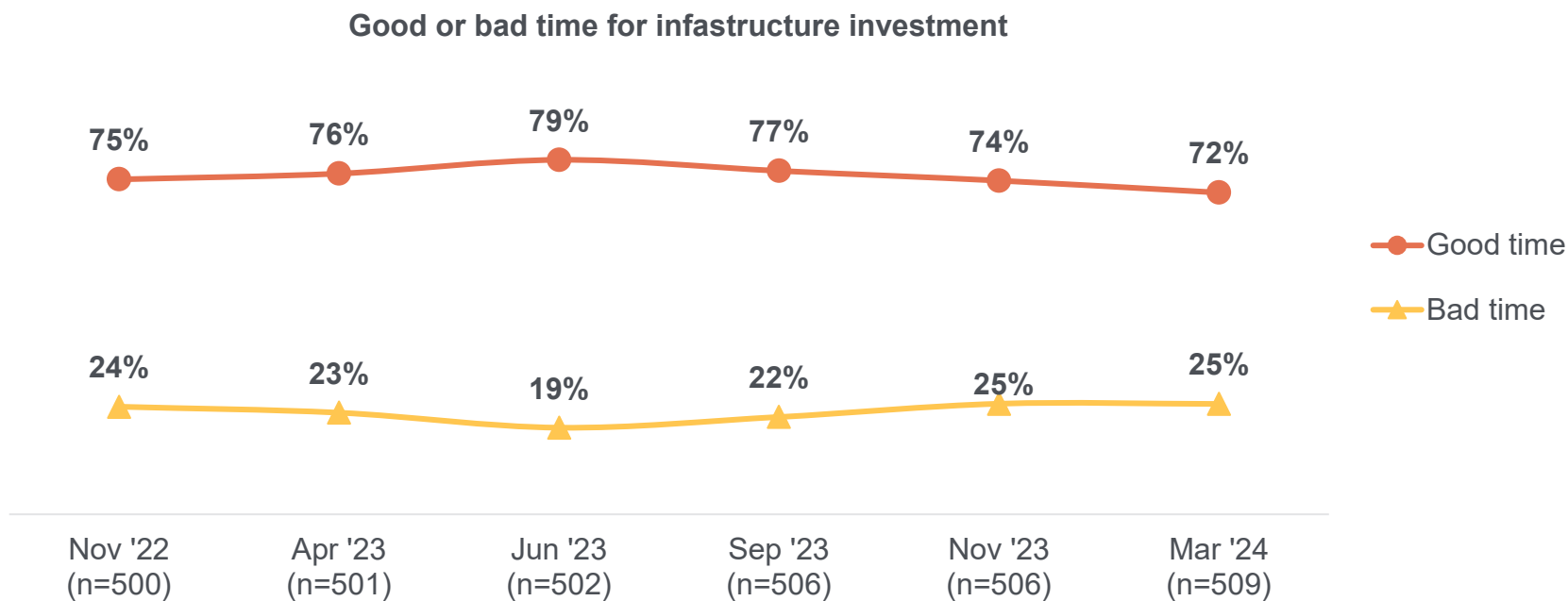
II1. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?

Base: all respondents (n=509)



Tracking infrastructure investment

The proportion of Calgarians who believe it is a good time for The City of Calgary to invest in infrastructure has remained consistent since last quarter.



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

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



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:

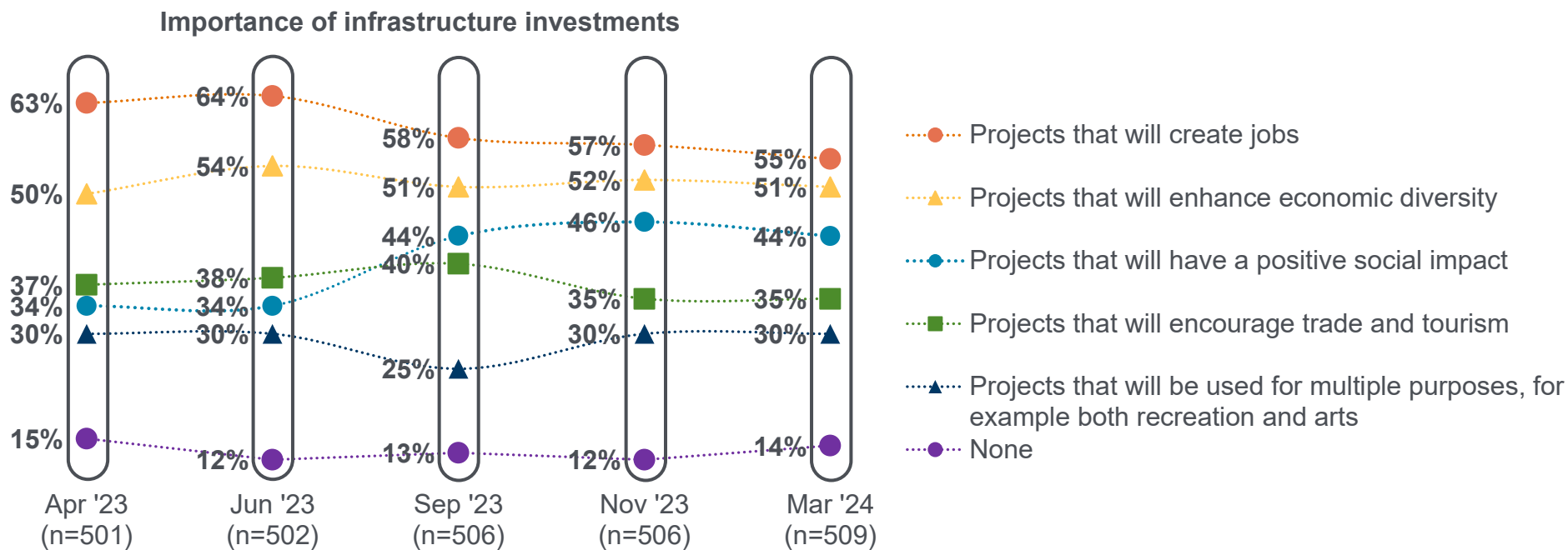
ONLY IF NEEDED, REPEAT "Which of these two types of projects do you think is most important?"

- 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

Support for different types of infrastructure projects has remained consistent since last quarter, with infrastructure projects that will create jobs (55%) continuing to be considered most important, followed closely by projects that will enhance economic diversity (51%). Projects that will have a positive social impact (44%) surpassed those that encourage trade and tourism (35%) in September 2023 and has maintained its third spot since then.



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

Base: all respondents



Detailed findings

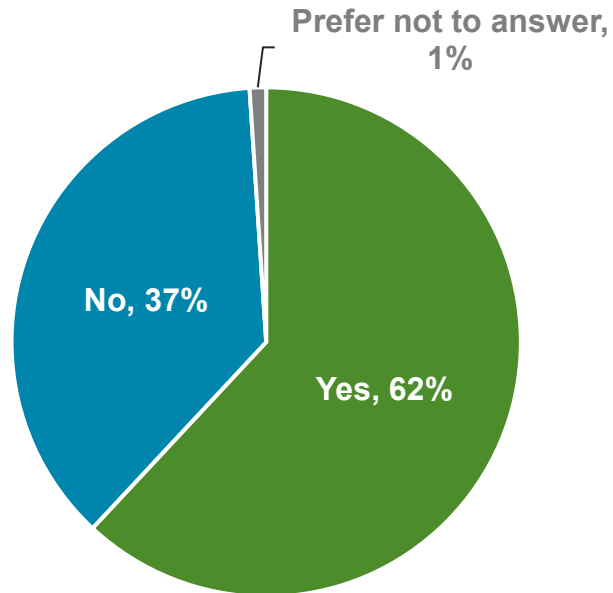
Taxes and user fees



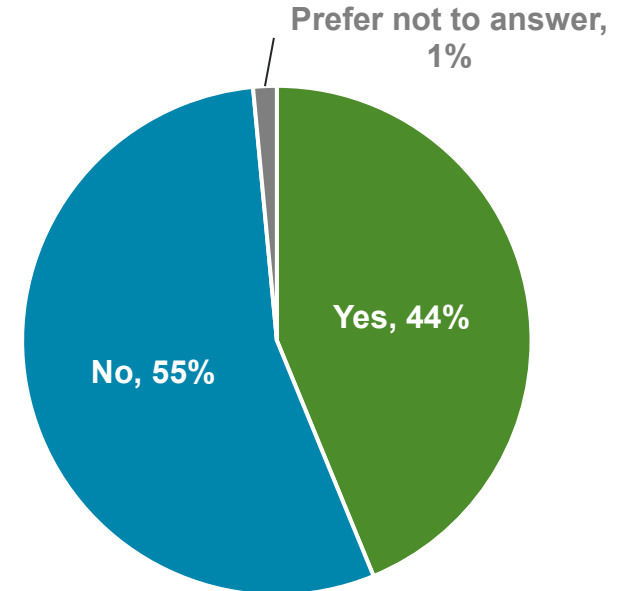
Awareness of The City collecting provincial property tax

More than half (62%) of Calgarians are aware that The City collects property tax on behalf of the Provincial government. A smaller number (44%) are aware that 35% of taxes collected by The City are transferred to the Province.

Aware The City collects property tax on behalf of the Provincial Government



Aware 35% of taxes collected by The City are transferred to the Province



PT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?

PT2. Were you aware that approximately 35 per cent of taxes The City collects is transferred to the Province?

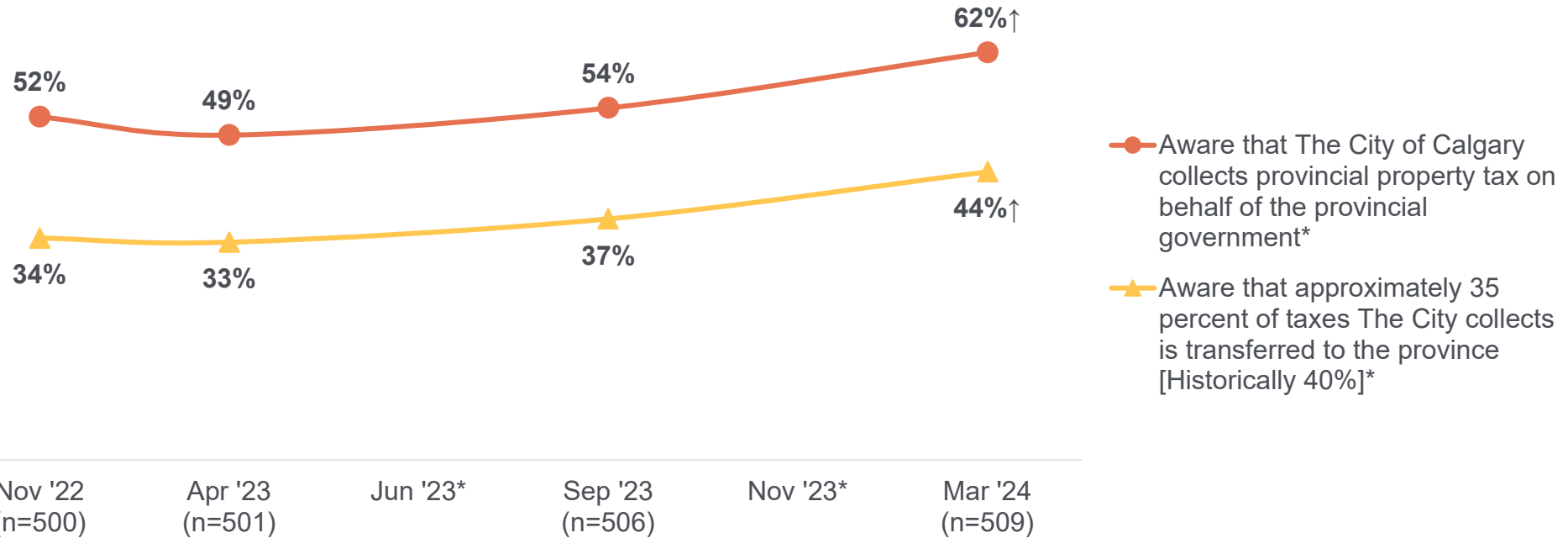
Base: all respondents (n=509)



Tracking awareness of The City collecting provincial property tax

Awareness of The City collecting property tax on behalf of the Province has increased from 54% in September 2023 to 62% this quarter. The percentage of Calgarians who are aware that approximately 35% of taxes collected by Calgary is transferred to the Province also increased (from 37% to 44%).

Aware The City collects and transfers property tax to the Provincial government



PT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
 PT2. Were you aware that approximately 35 per cent of taxes The City collects is transferred to the Province?
 Base: all respondents

* Question asked semi-annually
 ↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



Detailed findings

Segment differences



Segment differences

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



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

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



Segment differences

- Male Calgarians are more optimistic than female Calgarians about the current economic situation in Calgary (57% vs. 39%) and Alberta (53% vs. 38%). They also have higher expectations that the economy will be stronger in six months (21% vs. 12%) and are more likely to believe it is a good time for infrastructure investments (78% vs. 66%).
- Younger Calgarians (aged between 18 to 34) are less optimistic than older Calgarians about the current economic situation in Calgary (30%), Alberta (24%), and Canada (23%).

	Gender		Age group			Quadrant			
	Female (n=230)	Male (n=269)	18-34 (n=73)	35-54 (n=185)	55+ (n=251)	S.W. (n=153)	S.E. (n=128)	N.W. (n=148)	N.E. (n=80)
Overall quality of life in Calgary (% good)	57%	62%	51%	63%	62%	63%	58%	63%	50%
Current economic situation: Calgary (% good)	39% ↓	57% ↑	30% ↓	54% ↑	56% ↑	49%	48%	43%	51%
Current economic situation: Alberta (% good)	38% ↓	53% ↑	24% ↓	49%	60% ↑	44%	48%	42%	49%
Current economic situation: Canada (% good)	36%	37%	23% ↓	42%	41%	38%	33%	33%	40%
Expectation of economy in six months (% stronger)	12% ↓	21% ↑	12%	20%	16%	12%	13%	20%	21%
Good or bad time for infrastructure investments (% good time)	66% ↓	78% ↑	74%	74%	68%	70%	67%	72%	79%

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

- Lower-income Calgarians (<\$90k) are less positive about the overall quality of life in Calgary (52%) and the current economic situation in Calgary (40%), Alberta (36%) and Canada (29%), compared to those with annual household incomes of \$90k+.
- In contrast, higher-income Calgarians (\$150k+) are more optimistic about the quality of life in Calgary (72%).
- Those identifying as BIPOC are also less positive about the overall quality of life in Calgary (50% vs. 63% for non-BIPOC Calgarians).

	Children in HH		BIPOC		Household income		
	Yes (n=131)	No (n=371)	Yes (n=99)	No (n=382)	<\$90k (n=158)	\$90k- <\$150k (n=125)	\$150k+ (n=151)
Overall quality of life in Calgary (% good)	59%	60%	50% ↓	63% ↑	52% ↓	57%	72% ↑
Current economic situation: Calgary (% good)	43%	50%	51%	47%	40% ↓	54%	52%
Current economic situation: Alberta (% good)	42%	47%	41%	47%	36% ↓	47%	52%
Current economic situation: Canada (% good)	34%	36%	36%	36%	29% ↓	42%	42%
Expectation of economy in six months (% stronger)	17%	16%	16%	16%	20%	14%	15%
Good or bad time for infrastructure investments (% good time)	73%	71%	65%	74%	69%	76%	73%

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%	45%
Male	48%	53%
Prefer to self-describe	1%	1%
Prefer not to answer	1%	1%

Quadrant	Weighted %	Unweighted %
Southwest	29%	30%
Southeast	23%	25%
Northwest	29%	29%
Northeast	20%	16%

Age	Weighted %	Unweighted %
18-24	8%	4%
25-34	22%	11%
35-44	17%	17%
45-54	20%	20%
55-64	12%	18%
65-74	12%	18%
75+	9%	13%

People in household	Weighted %	Unweighted %
1	18%	
2	31%	
3	16%	
4 or more	33%	
Prefer not to answer	2%	

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

Senior in household	Weighted %	Unweighted %
Yes	30%	
No	70%	
Prefer not to answer	<1%	

Tenure in Calgary	Weighted %	Unweighted %
Less than 10	10%	
10-20	23%	
21-30	23%	
31-40	14%	
Over 40	28%	
Prefer not to answer	2%	

Disability in household	Weighted %	Unweighted %
Yes - myself	13%	
Yes - someone in my household	12%	
No	77%	
Prefer not to answer	<1%	

Identify as 2SLGBTQ+	Weighted %	Unweighted %
Yes	9%	
No	90%	
Prefer not to answer	2%	

Base: all respondents (n=509)

Respondent profile

Employment status	
Employed full-time	57%
Employed part-time	11%
Retired	21%
Student	4%
Unemployed	4%
Unable to work because of sickness or disability	4%
Looking after home / family	2%
Unpaid / volunteer work	1%
Other	1%
Prefer not to answer	<1%

Business owner	
Yes	26%
No	74%
Prefer not to answer	<1%

Annual household income	
Less than \$90,000	31%
\$90,000 to just under \$150,000	26%
\$150,000 and over	30%
Don't Know	3%
Prefer not to answer	10%

Racialized	
Yes	18%
No	77%
Prefer to self-describe	1%
Prefer not to answer	4%

Identify as Indigenous	
Yes - First Nations	2%
Yes - Métis	3%
Yes - Inuit	0%
Yes - Prefer to self-describe	1%
No	93%
Prefer not to answer	1%

Education	
Completed high school or less	19%
Some post secondary or completed a college diploma	29%
Completed university degree	50%
Prefer not to answer	1%

Base: all respondents (n=509)

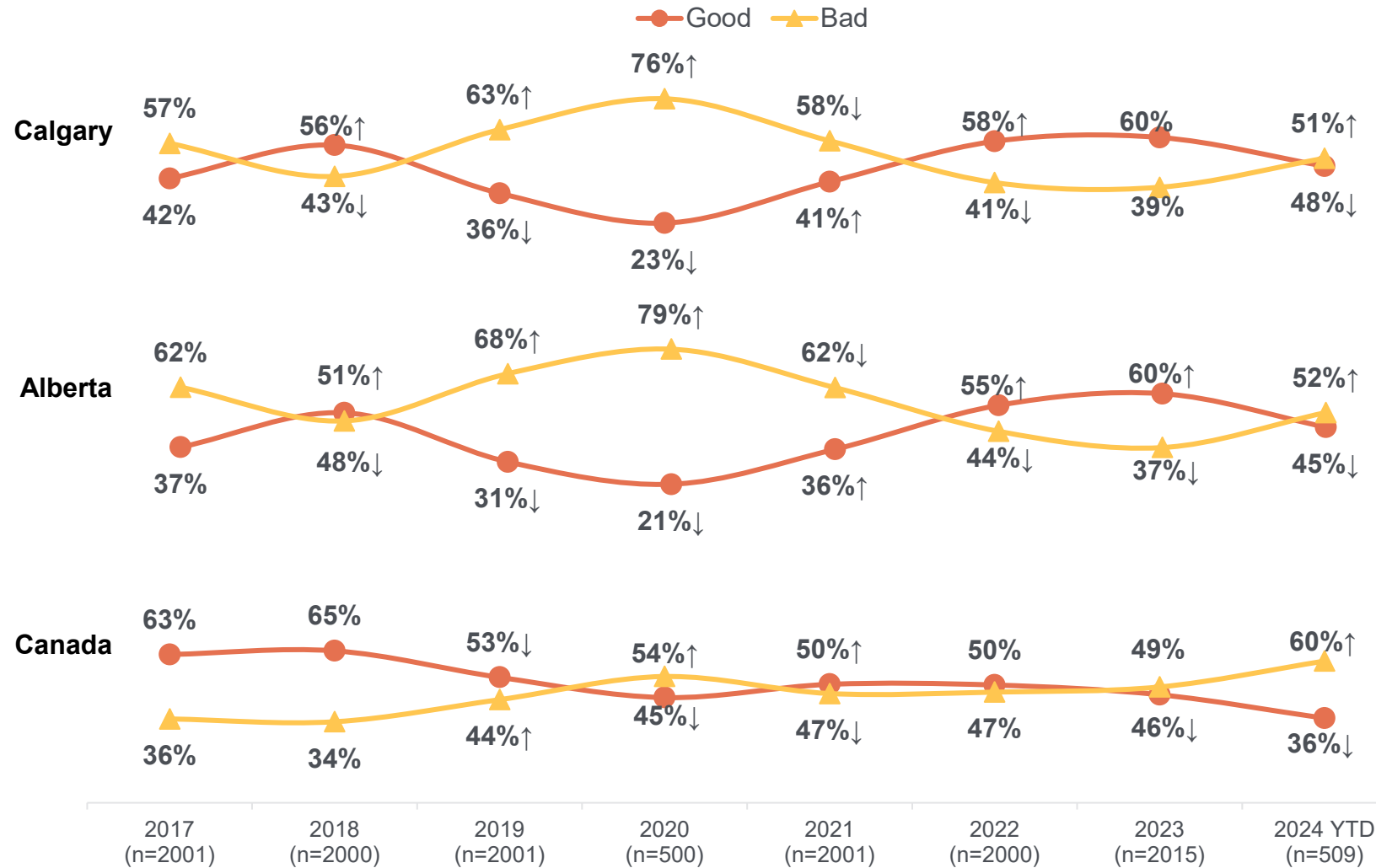


Appendix

Tracking



Tracking current economic situation

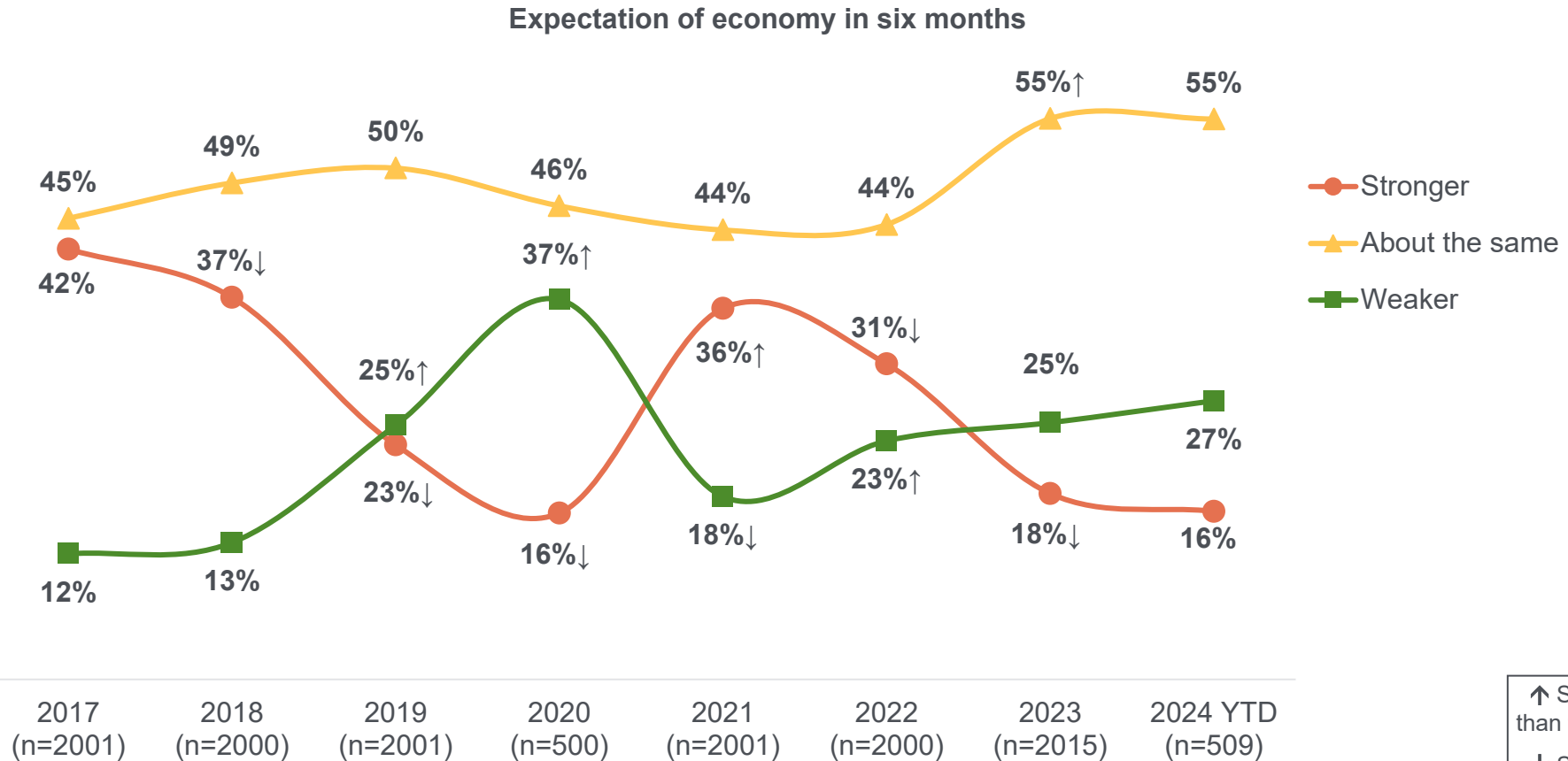


↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave

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



Tracking future economy in Calgary



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

Base: all respondents



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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 (n=2015)	2024 YTD (n=509)
It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy	91%	92%	91%	92%	88%↓	88%	86%↓	84%
I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery	77%	73%↓	66%↓	68%	70%	65%↓	64%	49%↓
I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities					67%	63%↓	62%	51%↓
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%	44%↓
The City of Calgary municipal government is taking appropriate measures to assist in Calgary’s economic recovery					61%	58%	55%	41%↓
The City of Calgary is making an effort to reduce the cost of local government					41%	39%	38%	28%↓

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

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



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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 (n=2015)	2024 YTD (n=509)
Now is a good time for companies to be investing in Calgary	77%	73%↓	68%↓	62%↓	74%↑	81%↑	76%↓	72%
Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today	37%	36%	50%↑	60%↑	39%↓	39%	50%↑	50%
Calgary as a city is attracting enough investment from outside of the province to help our economy					37%	47%↑	49%	47%
Now is a good time to start a new business in Calgary	43%	44%	33%↓	31%	39%↑	49%↑	43%↓	39%

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



Contact

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



Questionnaire



Questionnaire

Economic Perspectives Survey: 2024 Q1



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 Q54 ref (Q54 = 9)*

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

Q51

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 Q51 DK Ref (Q51 = 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 Q51 Outside Calgary (Q51 = 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
- ₅ [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 INFORMATION ABOUT THE ECONOMY

CM1

Thinking back over the past 3 months, have you read, seen, or heard anything about Calgary's economy or Calgary's economic conditions?

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

CM2 *Show if CM1 is Yes*

And what exactly do you remember reading, seeing, or hearing?

IF THE RESPONDENT MENTIONS WHERE THEY HEARD ABOUT CALGARY'S ECONOMY, FOLLOW UP AND RECORD WHAT THEY HEARD / THE MESSAGE

- 8 Prefer not to answer
- 9 Don't know



Questionnaire

PERSPECTIVES OF PROPERTY TAX

PT1 *Show if Quarter = 1 or 3*

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. Approximately 65 percent of property tax collected in Calgary is invested in City services and programs, while the remaining 35 percent goes to the Government of Alberta.

Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?

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

PT2 *Show if Quarter = 1 or 3*

Were you aware that approximately 35 percent of taxes The City collects is transferred to the province?

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

PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

III

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

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

I2BOS1

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

I2BOS2

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

I2BOS3

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



Questionnaire

H2BOS4

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

H2BOS5

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

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

4 Prefer not to answer

QD2

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

Minimum: 1, Maximum: 50

_____ people

4 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
- 3 [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
- 3 [DO NOT READ] Prefer not to answer



Questionnaire

QD6

How many years have you lived in Calgary?

IF LESS THAN 1 YEAR, ENTER 0

Minimum: 0, Maximum: 100

_____ years

-4 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: _____)
- 98 [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

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
- 99 [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



Questionnaire

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
- 96 Prefer to self-describe [specify]: _____
- 99 [DO NOT READ] Prefer not to answer

QD15

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

MULTIPLE RESPONSES ARE ACCEPTED

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

QD16 *Show if Not Indigenous (QD15_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
- 96 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.

- 4 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 five" please enter the phone number associated to this call.

First name: _____

Last name: _____

Telephone number: _____

- 4 Prefer not to answer