

Calgary



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ATTACHMENT 7



Economic Perspectives Research Wave 3 Report

ISC: Unrestricted

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Economic Perspectives Survey: Wave 3 Highlights at a Glance



79%

Rate quality of life in Calgary as “good”



42%

Rate the economy in Calgary as “good”



27%

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



34%

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



62%

Agree The City is “taking appropriate measures to assist in Calgary’s economic recovery.”



44%

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



57%

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



36%

Aware that 40% of taxes collected by The City are transferred to the Province



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Data Collection

- Telephone interviews were conducted with a randomly selected sample of n=500 Calgarians between September 30th and October 15th, 2021*.
- Interviews were conducted using 30% landline sample and 70% 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, ↓ denotes a significant decrease from previous wave and ↑ 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.

* Note: the survey was fielded during the campaign period for the Calgary Municipal Election, held on October 18th, which may have impacted results

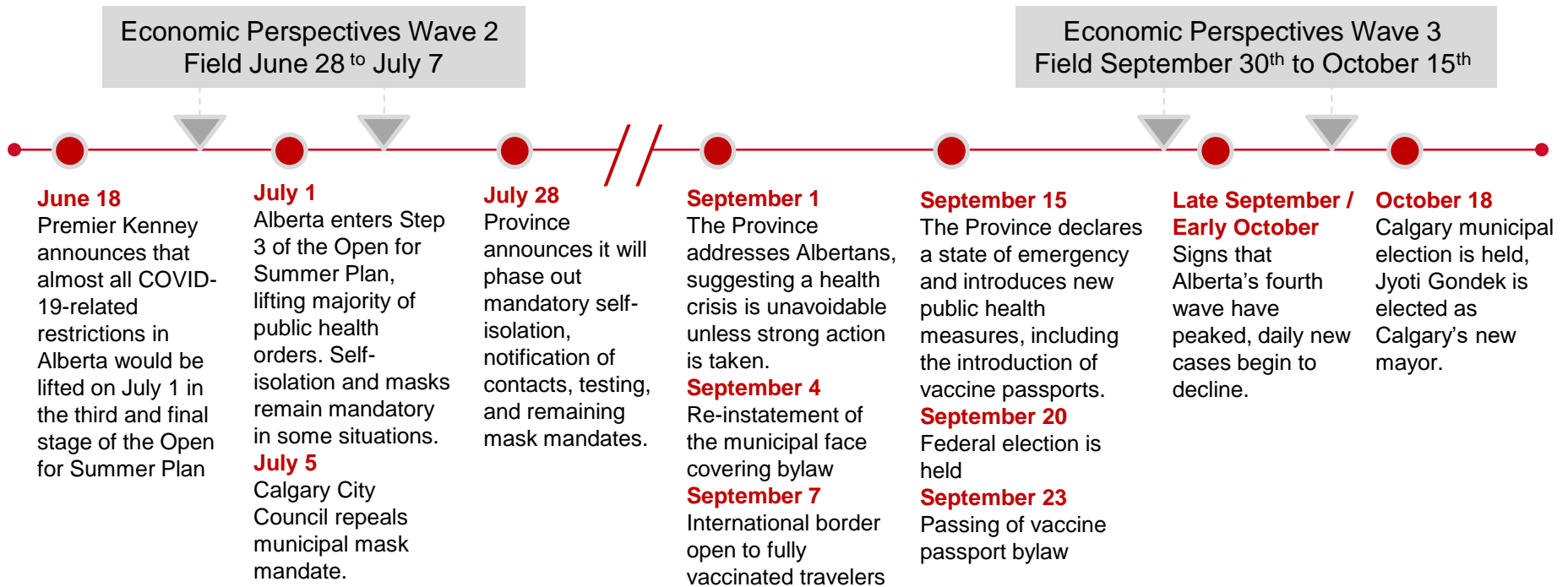
Survey Context





Survey Context: October 2021

When the last wave of the Economic Perspectives Survey was fielded in July 2021, Calgaryans had been living with the COVID-19 pandemic for nineteen months. Optimism seen in the summer months may have been short-lived as Alberta moved into the 4th wave of the pandemic and was again leading the country in daily new COVID cases and active cases. Conversely, significant progress was made on vaccinations including among younger Albertans aged 12-17. The health care and education sectors were hardest-hit while the oil sector was showing steadfast recovery to a point that it surpassed pre-pandemic levels. The pandemic and measures to contain its spread have continued to impact our local and national economies in many ways: from reduced tourism and business closures to higher health care costs, shifting restrictions, school closures, unemployment, and immigration. We have come to see how the pandemic and the economy are inextricably linked, a narrative that is reflected in the following survey findings.



Summary of Findings



Summary of Findings: Quality of Life and the Economy

Perceptions of the quality of life in Calgary as being ‘good’ are on par with previous survey results fielded in July 2021, however, fewer rated the quality of life as ‘very good’ (rating of 10) this survey wave.

- Over three-quarters (79%) of survey respondents gave a “good” rating for overall quality of life in Calgary, which is unchanged compared to the last survey wave fielded in July 2021 (79%). Eight percent (8%) gave overall quality of life a “poor” rating, which has also remained steady.

Perceptions of the current economic situation in Calgary, Alberta, and Canada as being ‘good’ have held steady since the last survey wave fielded in July 2021, however, there is less optimism about the future of Calgary’s economy in October 2021.

- While ratings of the current economic situation are stable, there has been a significant decrease in those who expect Calgary’s economy to be stronger in the next six months. This is likely due to the fourth wave of the pandemic during August to October 2021, given Calgarians were optimistic in July when Calgary was “open for summer” and cases were low.
- Overall, fewer than one-third (27%) of respondents expect the economy in Calgary to be stronger in the next six months, down 24 points from 51% in the previous wave. One-fifth (21%) of respondents expect it to be weaker, up 12 points from 9%, and one-half (51%) expect the economy to be “about the same” in the next six months, up 13 points from 38%.

Summary of Findings: Economic Recovery

There are signs Calgarians are less optimistic about Calgary’s economic recovery this fall than they were this summer, with more Calgarians expecting the unemployment rate in Calgary to get worse in six months, and fewer agreeing that now is a good time to start a new business in Calgary.

- Calgarians are not overly optimistic about Calgary’s economic recovery, with two-in-five (42%) “expecting the unemployment rate in Calgary to get worse than it is today” in six months, and only one-third (34%) agreeing that “now is a good time to start a business in Calgary”.
- While over seven-in-ten (72%) Calgarians believe now is a good time for companies to be investing in Calgary, only about one-third (35%) feel that Calgary as a city is attracting enough investment from outside of the province to help the economy.

Perceptions of The City’s role in economic recovery and encouraging investment is steady this survey wave and generally on par with the previous survey wave.

- Two-thirds (67%) of survey respondents trust The City to “make the right decisions when it comes to building projects like roads, public transportation, and local facilities” while just under two-thirds (62%) agree The City is “taking appropriate measures to assist in Calgary’s economic recovery.” Only forty-four percent (44%) agree The City is “making an effort to reduce the cost of local government.”
- A strong majority (87%) of respondents agree it is “important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy,” and seven-in-ten (72%) are confident 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.” Two-thirds (66%) trust The City to “make the right decisions to help our city through this economic recovery”.

Summary of Findings: Infrastructure Investment

Many continue to support The City investing in infrastructure with a focus on creating jobs, increasing economic diversity, and encouraging trade and tourism. This is consistent with previous survey results fielded in July 2021.

- Overall, seven-in-ten (69%) respondents think it is a “good time” for The City to invest in infrastructure.
- Perceptions of the importance of all types of infrastructure projects are stable this survey wave compared to last survey wave, sustaining increases observed in July 2021.
 - A solid majority of respondents feel it is important to focus on infrastructure investments that will create jobs (98%), enhance economic diversity (93%), and encourage trade and tourism (90%). Additionally, most respondents feel it is important to focus on projects that will be used for multiple purposes (87%) and that will have a positive social impact (85%).

A strong majority of survey respondents support more up-front investment on infrastructure projects, which has increased since the last survey wave fielded in July 2021.

- Most respondents (87%) support more up-front investment on infrastructure projects to reduce maintenance costs and extend timelines for replacement.



Summary of Findings: Taxes & User Fees

Awareness that The City collects provincial property tax on behalf of the Province, that 40% of taxes collected by The City are transferred to the Province, and how City services are funded, are all consistent this survey wave compared to the last survey wave fielded in July 2021.

- While about three-in-five (57%) Calgarians are aware The City collects provincial property tax on behalf of the Province, fewer (36%) are aware that 40% of taxes collected by The City are transferred to the Province.
- Seven-in-ten (71%) respondents 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.

Summary of Findings: Trust & Reputation

Levels of trust and satisfaction with how The City (including both Council and Administration), City Council, and City Administration are going about running our city are stable compared to the last survey fielded in July 2021.

- About half (45%) of respondents say they trust The City, while one-quarter (24%) say they distrust The City. A similar proportion (29%) feel neutral.
- Two-thirds (66%) of respondents say they are satisfied with how City Administration (excluding Council) is going about running our city, while three-in-five (59%) say they are satisfied with how The City (including both Council and Administration) are running the city, and three-in-five (57%) are satisfied with how City Council (excluding Administration) is running our city.

Detailed Results





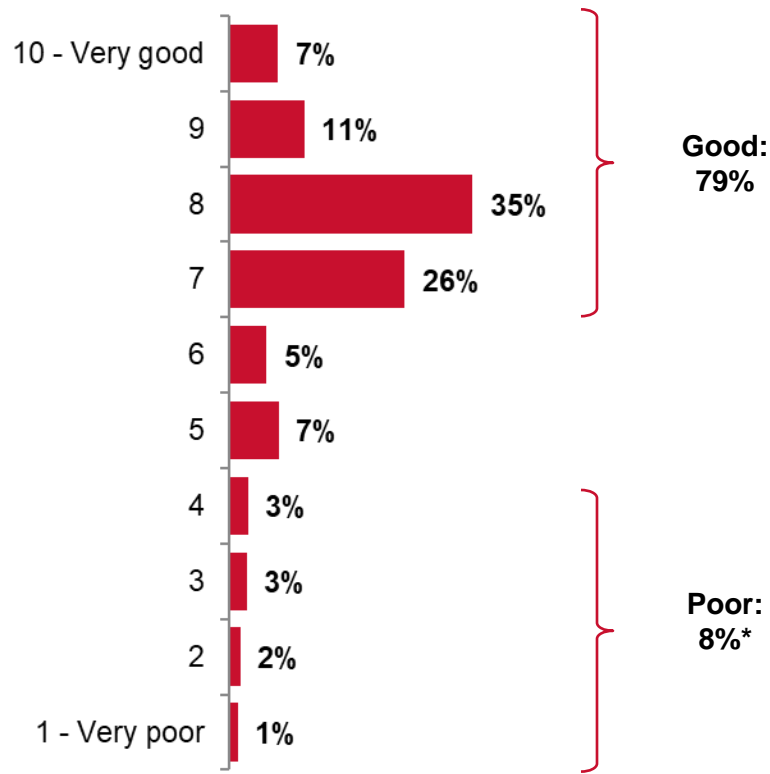
Quality of Life



Overall Quality of Life in Calgary

Over three-quarters (79%) of survey respondents give a “good” rating for overall quality of life in Calgary, while eight percent (8%) give overall quality of life a “poor” rating.

Rating of Quality of Life of Calgary



* Indicates rounding

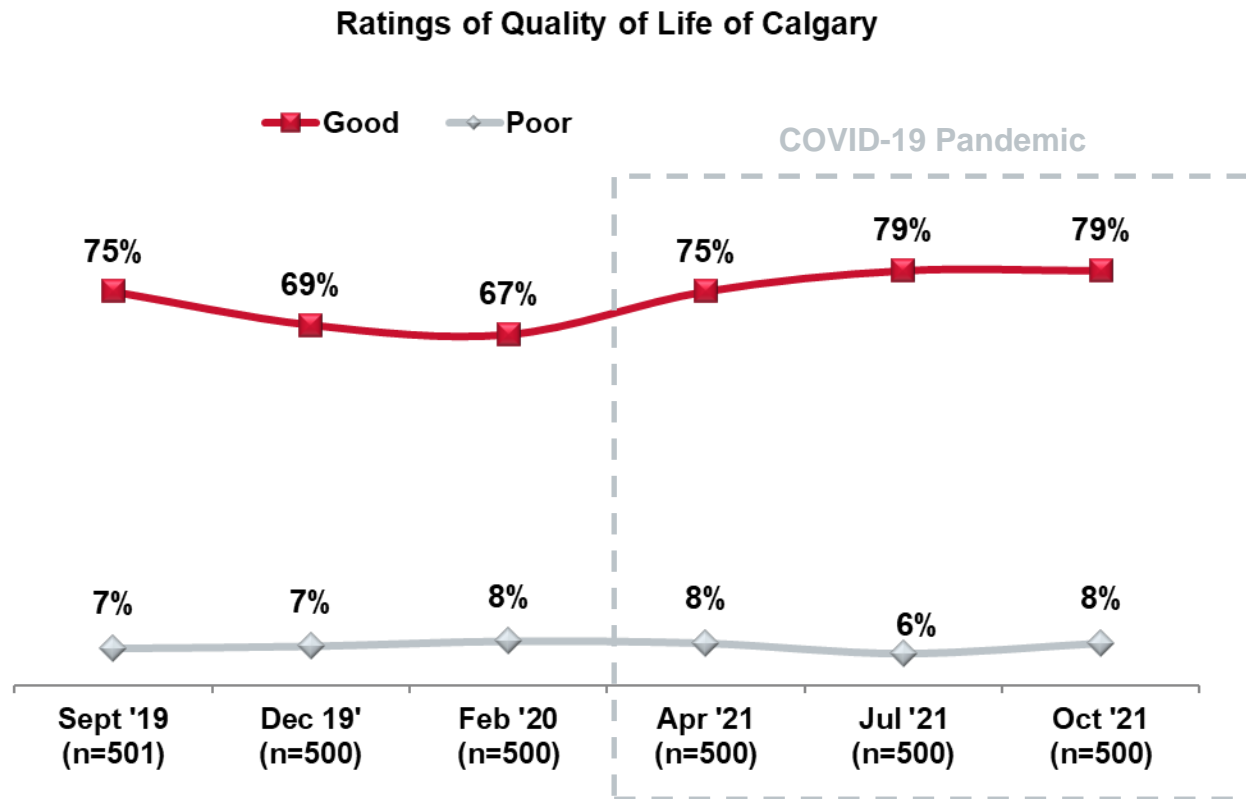
Q2. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in the city of Calgary today?

Base: all respondents (n=500)



Tracking Overall Quality of Life in Calgary

The same proportion of respondents rated the overall quality of life in Calgary as ‘good’ in this survey wave (79%) compared to the last survey wave in July 2021 (79%). However, fewer rated the quality of life as ‘very good’ (rating of 10) in this survey wave (7%) compared to last survey wave (12%). ‘Poor’ quality of life ratings have remained steady.



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



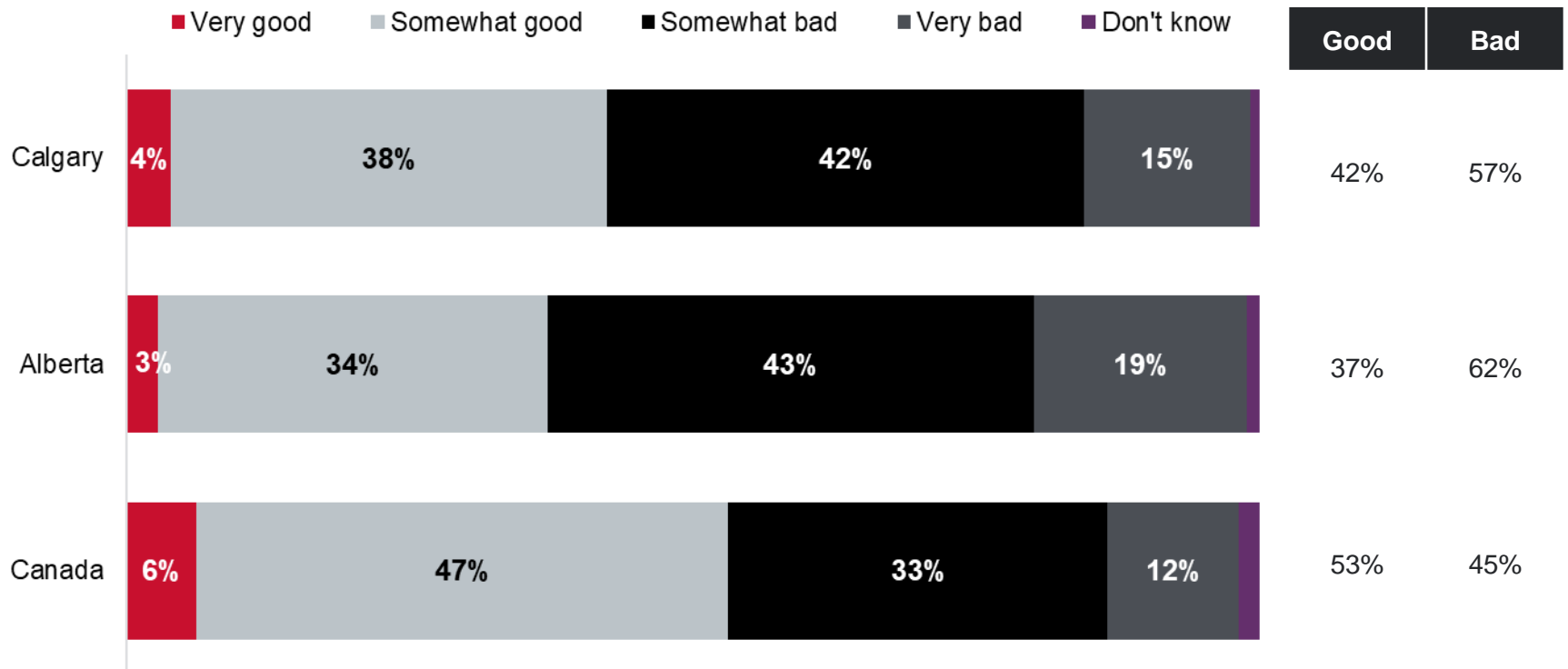
The Economy and Economic Recovery



Current Economic Situation

Just over half (53%) describe the current economic situation in Canada as “good,” while about two-in-five (45%) rate it as “bad.” About two-in-five (37%) rate the economic situation in Alberta as “good,” while about three-in-five (62%) rate it as “bad.” Two-in-five (42%) respondents rate the economic situation in Calgary as “good,” while three-in-five (57%) rate it as “bad.”

Rating Current Economic Situation



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

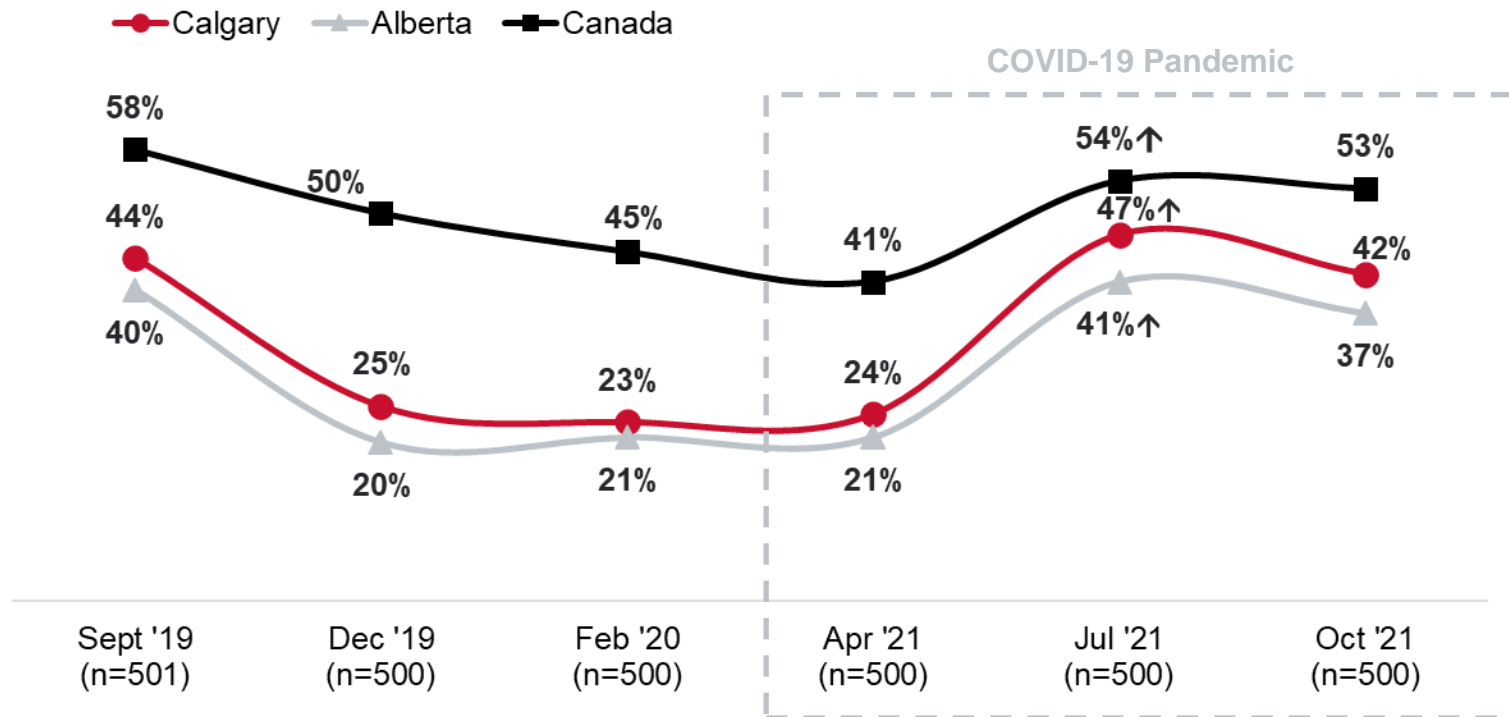
Note: 3% and lower not labelled



Tracking Current Economic Situation

The proportions of those who describe the economic situation in Calgary, Alberta, and Canada as 'good' in this survey wave have held relatively steady since the last survey wave fielded in July 2021, when significant increases were observed across all regions.

Tracking Current Economic Situation ('Good' Ratings)



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

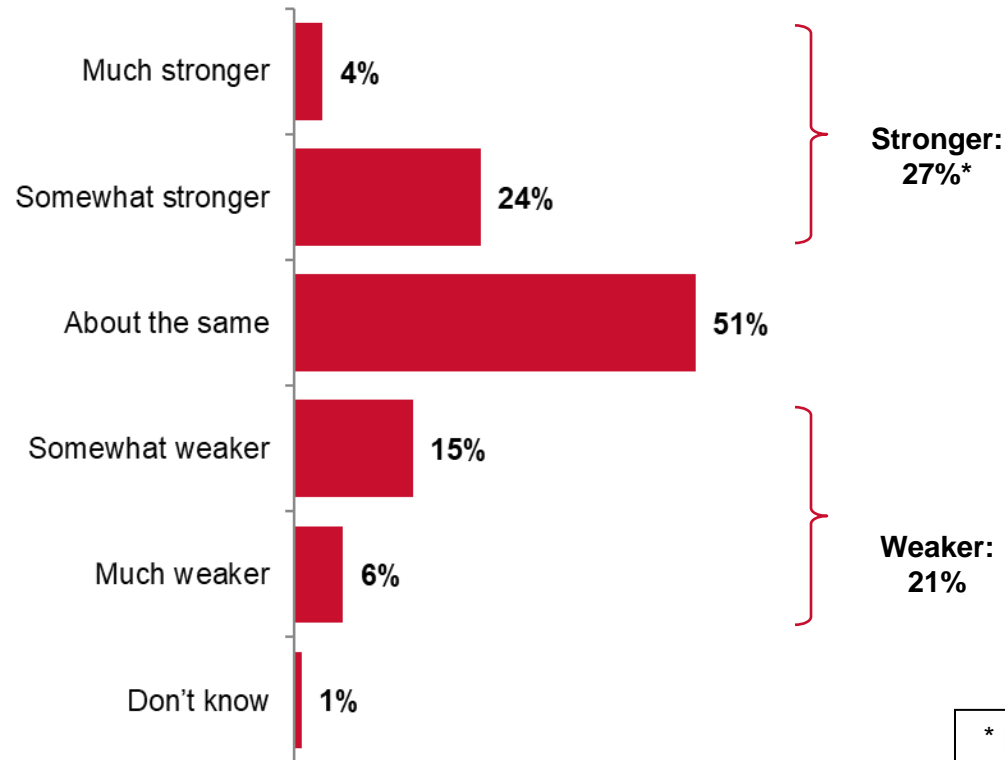
↑ Statistically higher than a previous quarter
↓ Statistically lower than a previous quarter



Future of the Economy in Calgary

Overall, one-quarter (27%) of respondents expect the economy in Calgary to be stronger in the next six months, while one-in-five (21%) expect it to be weaker. Half (51%) expect the economy to be “about the same” in the next six months.

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?

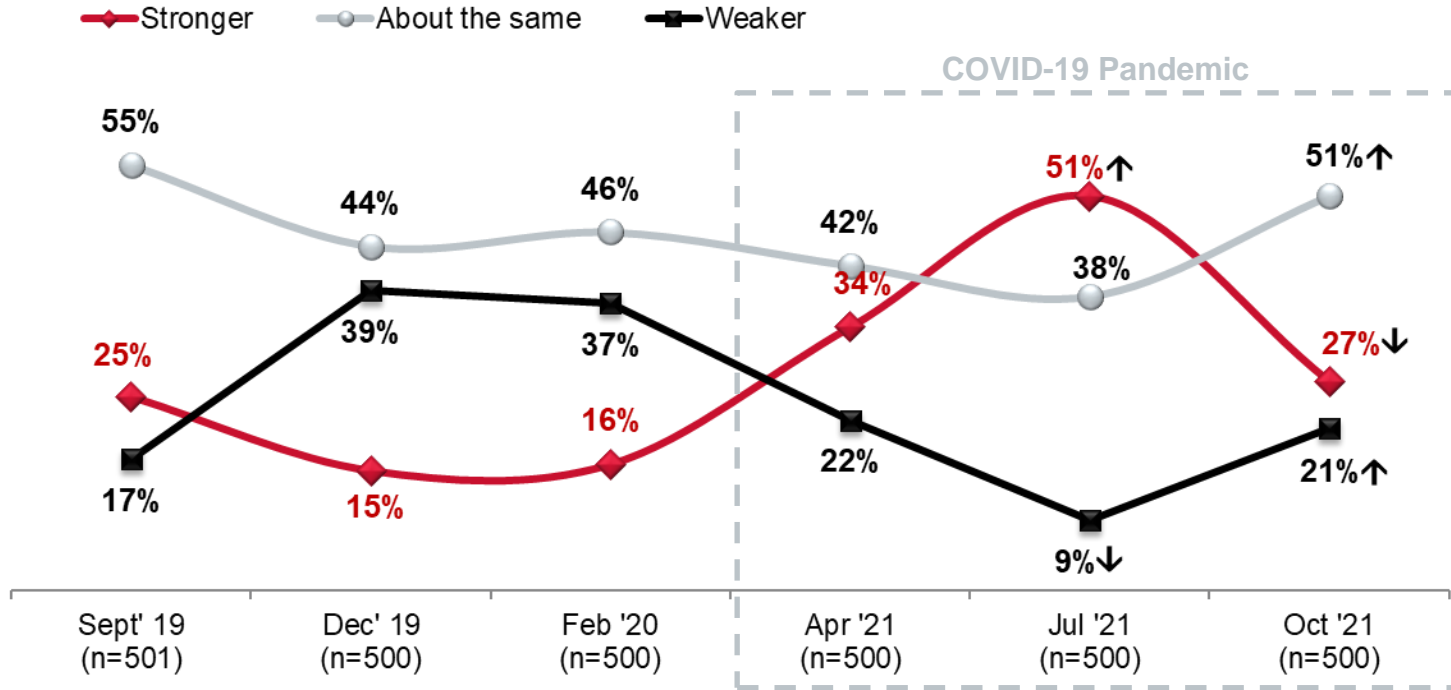
Base: all respondents (n=500)



Tracking Future of the Economy in Calgary

There has been a significant decrease in those who expect Calgary’s economy to be stronger in the next 6 months, indicating fewer Calgarians are optimistic about Calgary’s economy compared to July 2021. This is likely due to the fourth wave of the pandemic, given Calgarians were optimistic in July when Calgary was “open for summer” and cases were low.

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

↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter



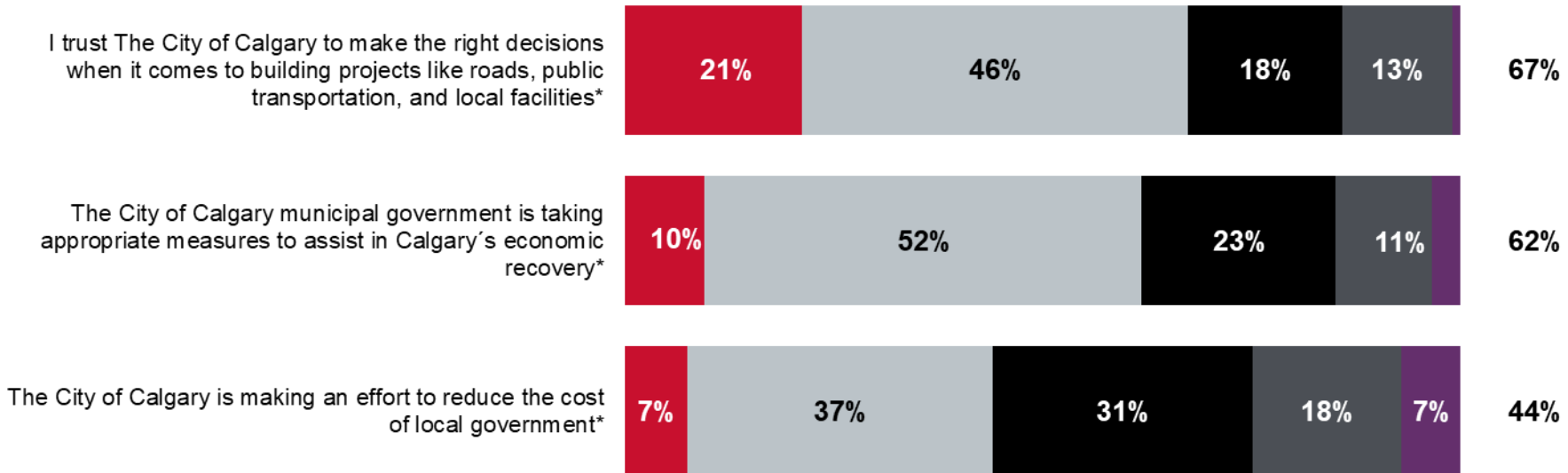
Perceptions of The City's Role in the Economic Recovery and Investments

Two-thirds (67%) of survey respondents trust The City to “make the right decisions when it comes to building projects like roads, public transportation, and local facilities” while three-in-five (62%) agree The City is “taking appropriate measures to assist in Calgary’s economic recovery.” Only two-in-five (44%) agree The City is “making an effort to reduce the cost of local government.”

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

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

Agree



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)

*Statements new in April 2021

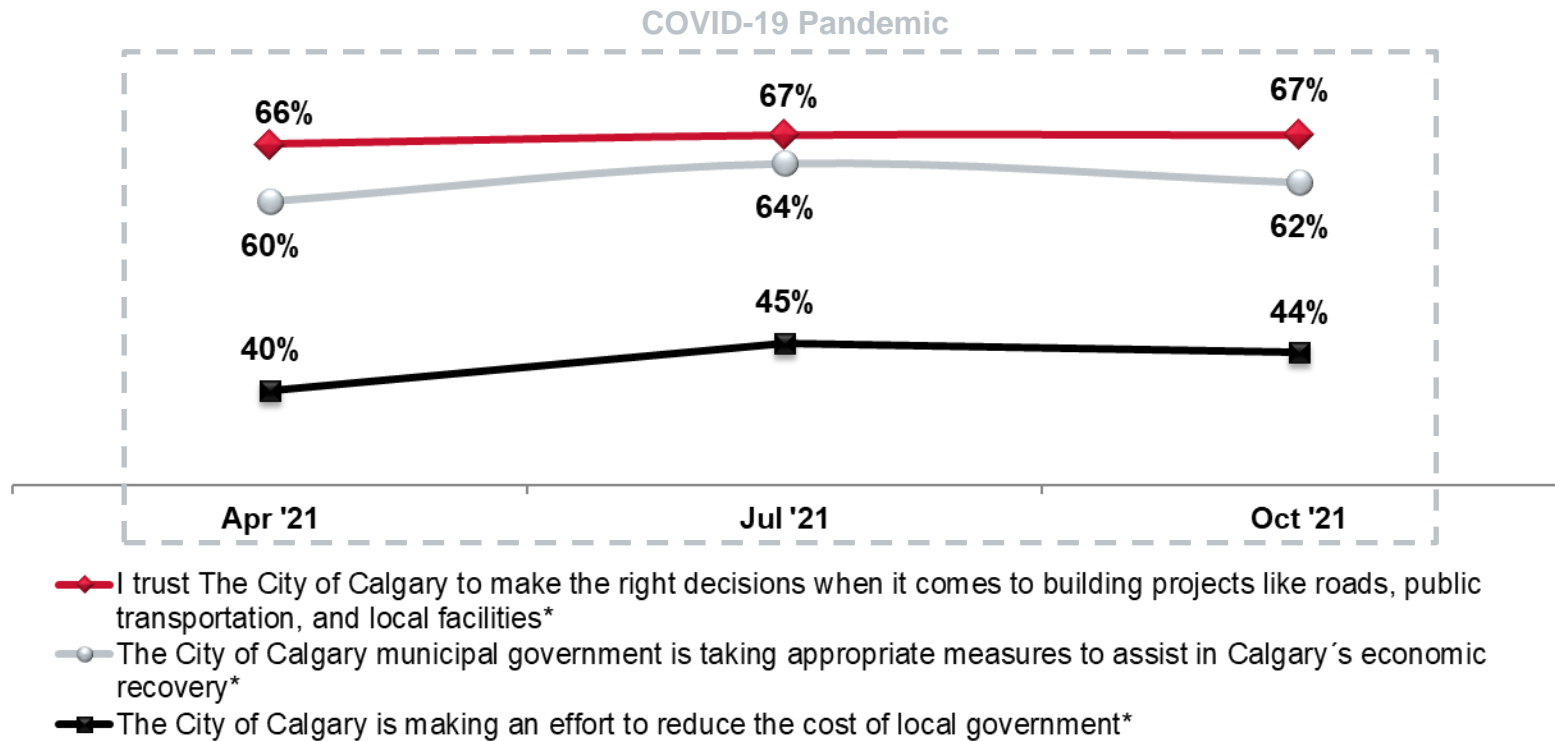
Note: 3% and lower not labelled



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

Perceptions of The City's role in the economic recovery continue to be steady this survey wave since tracking started in April 2021.

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

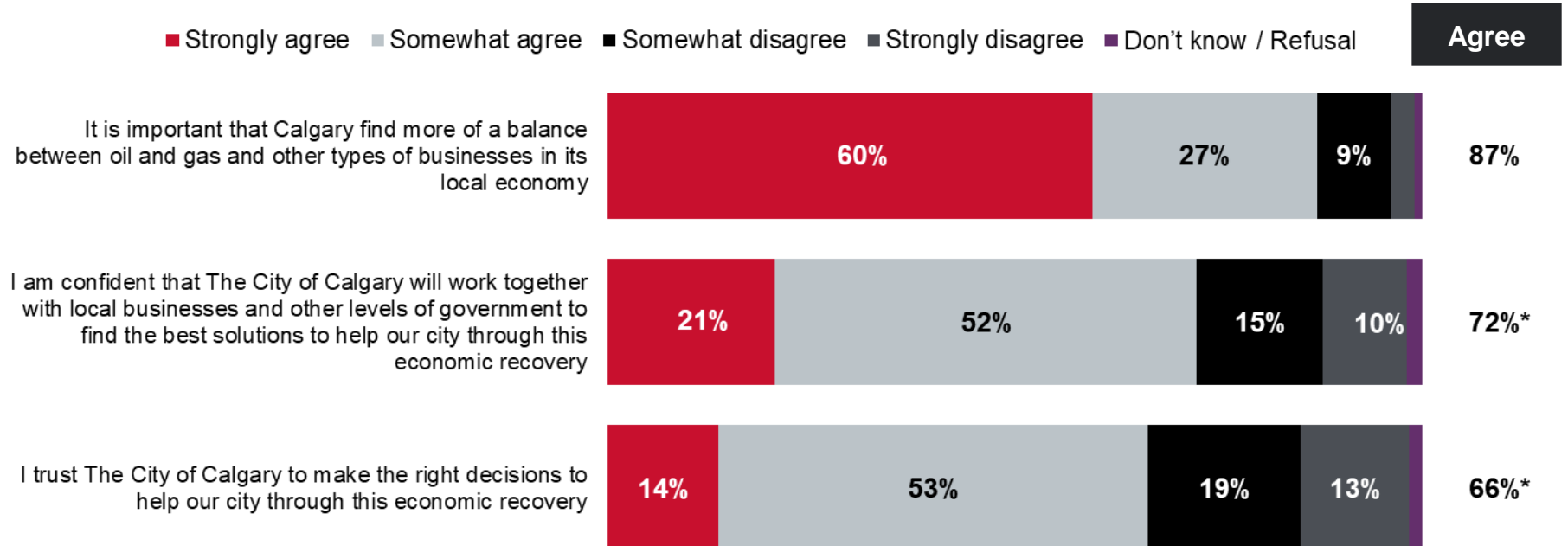
*Statements new in April 2021



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

A majority (87%) of respondents agree it is “important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy,” with three-fifths (60%) saying they “strongly agree.” Seven-in-ten (72%) are confident 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.” Two-thirds (66%) trust The City to “make the right decisions to help our city through this economic recovery.”

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

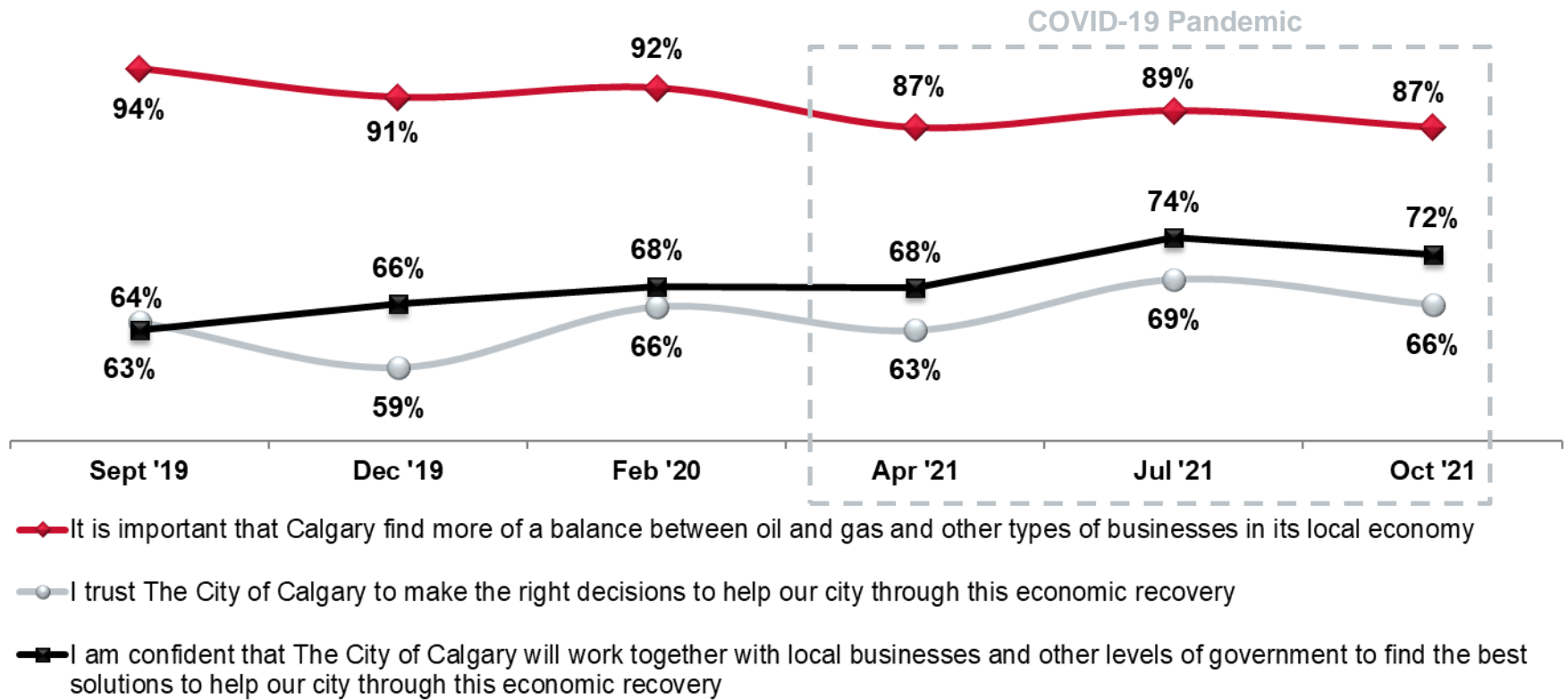
Note: 3% and lower not labelled



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

Perceptions of The City's role in the economic recovery continue to be steady this survey wave since the last, but have seen some minor variation over the last five survey waves.

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.

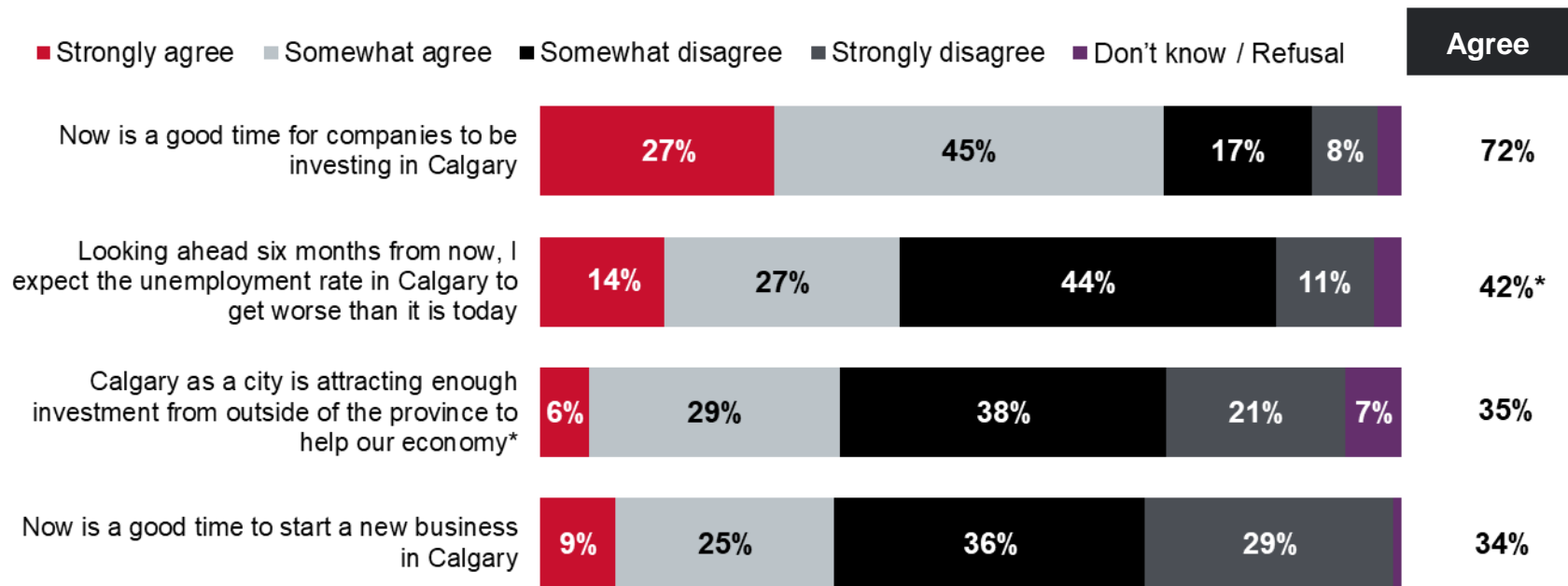
Base: all respondents (n=500)



Perceptions of Calgary's Economic Recovery and Investments

While seven-in-ten (72%) Calgarians believe now is a good time for companies to be investing in Calgary, only about one-third (35%) feel that Calgary as a city is attracting enough investment from outside of the province to help the economy. Calgarians are not overly optimistic about Calgary's economic recovery, with two-in-five (42%) "expecting the unemployment rate in Calgary to get worse than it is today" in six months, and only one-third (34%) agreeing that "now is a good time to start a business in Calgary".

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)

*Statement new in April 2021

* Indicates rounding

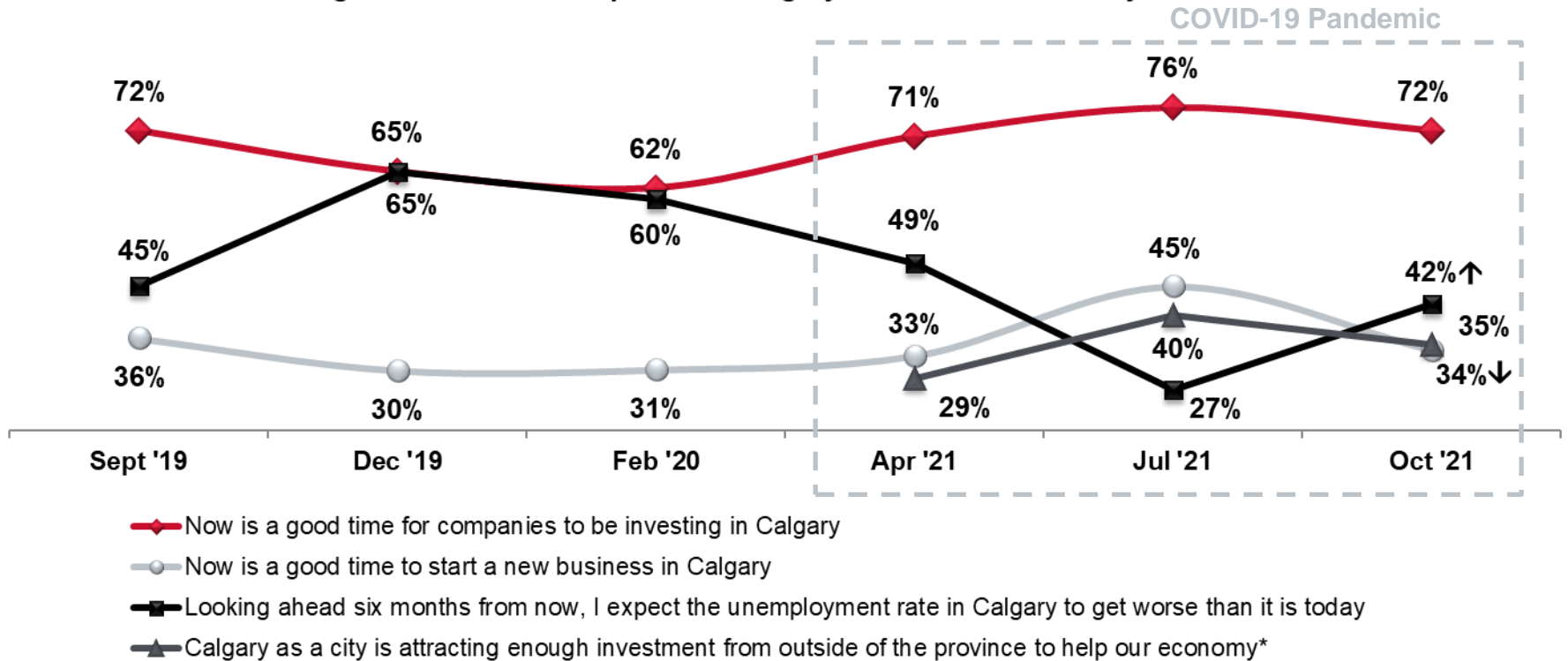
Note: 3% and lower not labelled



Tracking Perceptions of Calgary's Economic Recovery and Investments

Compared to the last survey wave in July 2021, significantly more Calgarians expect the unemployment rate in Calgary to get worse in 6 months than it is today. Additionally, significantly fewer Calgarians agree that now is a good time to start a new business in Calgary. These shifts suggest Calgarians are less optimistic about Calgary's economic recovery compared to July.

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. *Statement new in April 2021
 Base: all respondents (n=500)

↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter

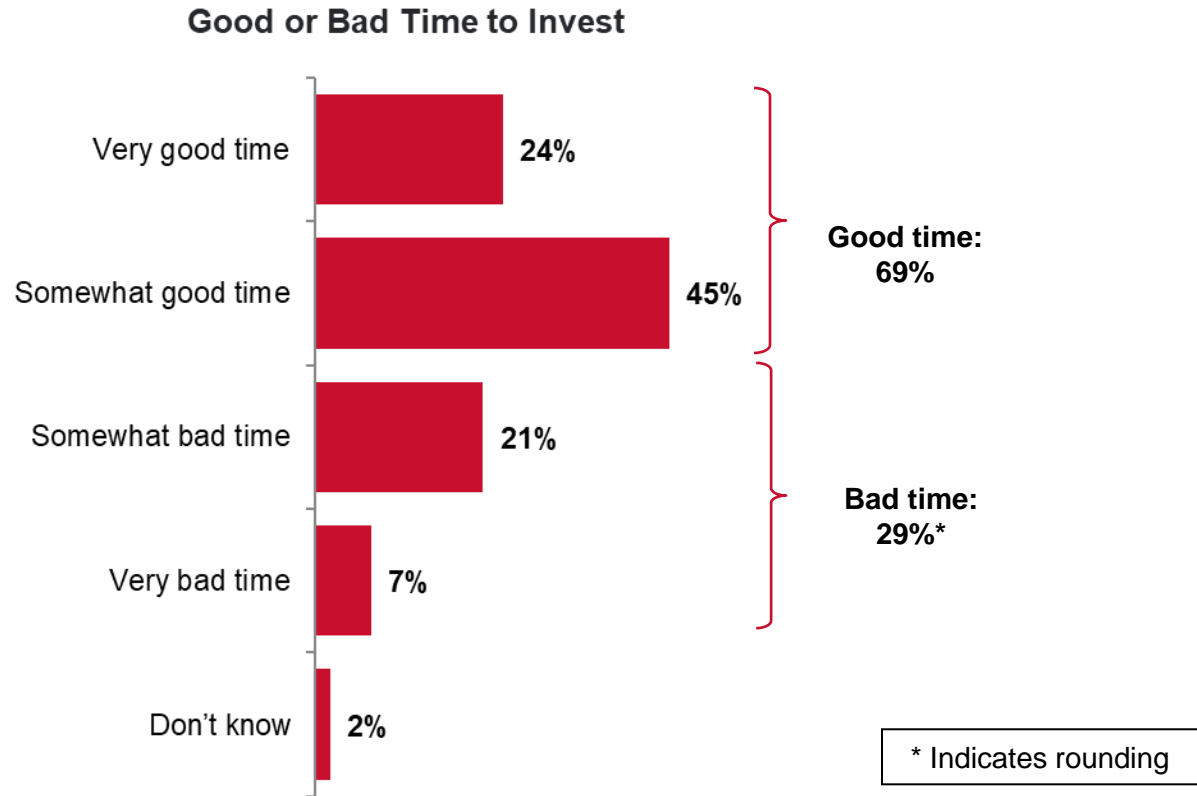


Infrastructure Investment



Infrastructure Investment

Overall, seven-in-ten (69%) respondents think it is a “good time” for The City to invest in infrastructure, while just under three-in-ten (29%) think it is a “bad time.”



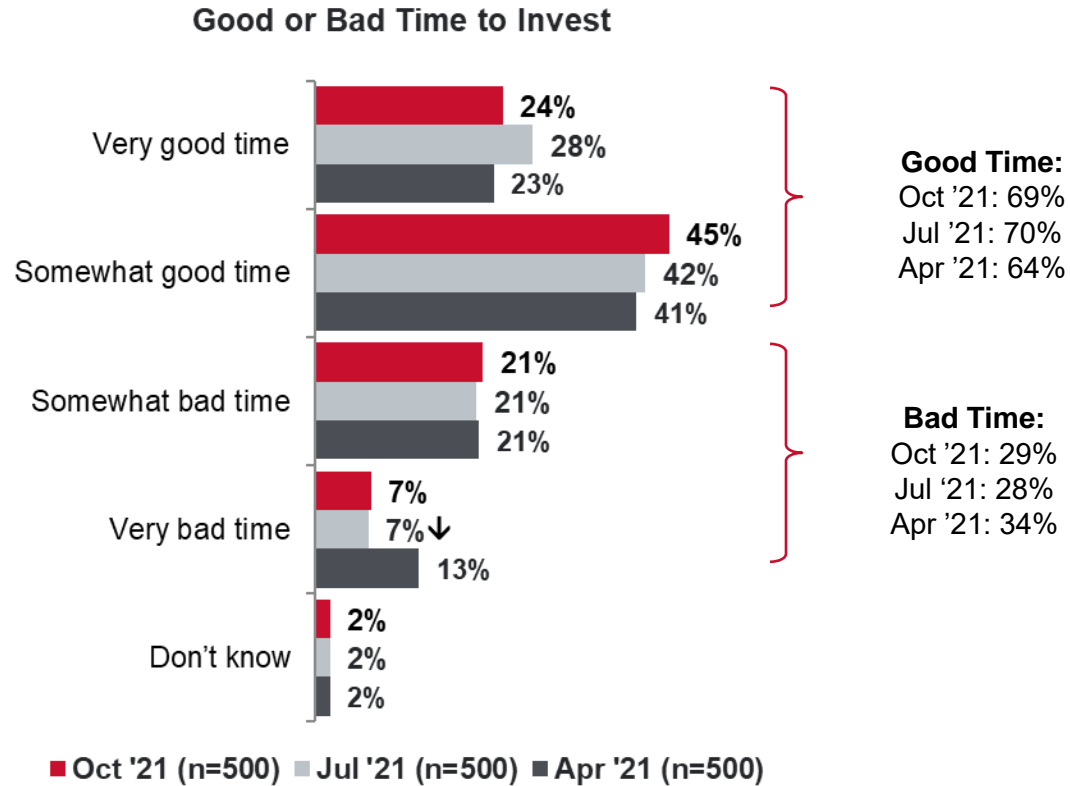
I11. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities? I am referring to the Calgary municipal government, including Council and Administration.

Base: all respondents (n=500)



Tracking Infrastructure Investment

Those respondents who think it is a “good time” or “bad time” for The City to invest in infrastructure has remained steady since the last survey wave fielded in July 2021.



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.

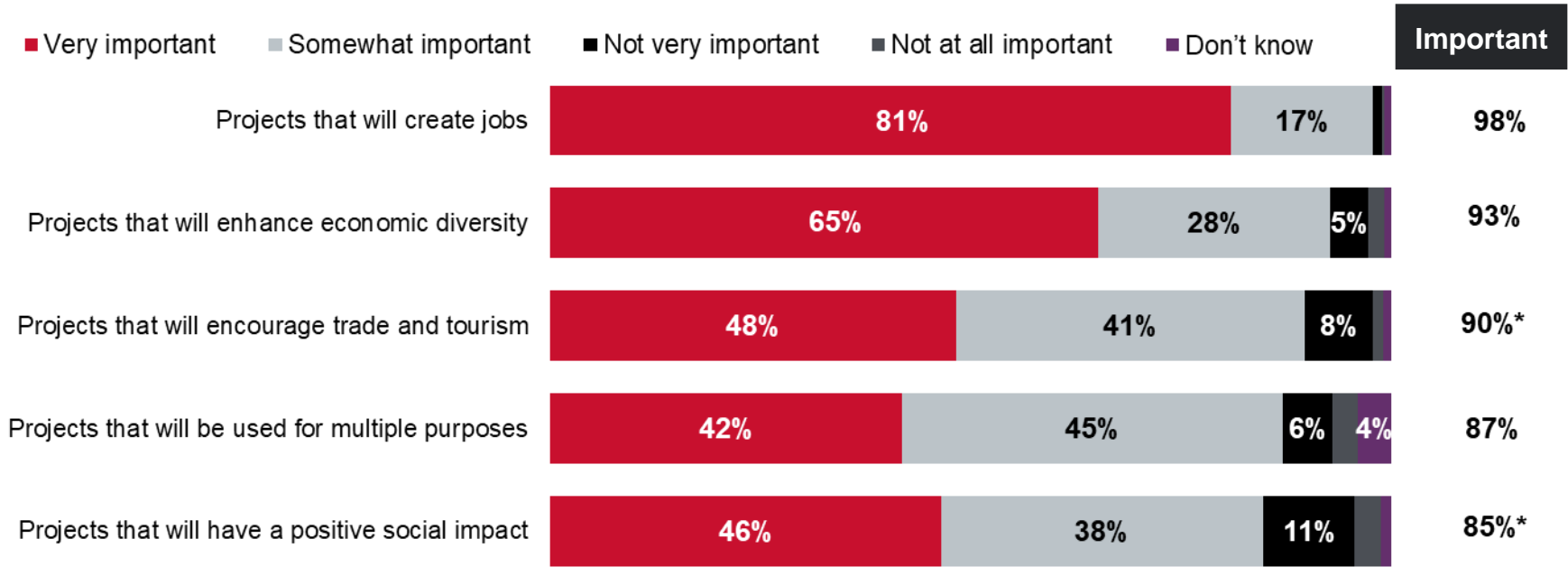
Base: all respondents (n=500)



Importance of Different Infrastructure Investments

A large majority of respondents feel it is important to focus on infrastructure investments that will create jobs (98%), with four-fifths (81%) saying this is “very important.” A majority also feel it is important to focus on projects that enhance economic diversity (93%) with two-thirds (65%) saying this is “very important.” Additionally, most respondents feel it is important to encourage trade and tourism (90%), focus on projects that will be used for multiple purposes (87%), and that will have a positive social impact (85%).

Importance of Infrastructure Projects



* Indicates rounding

Note: 3% and lower not labelled

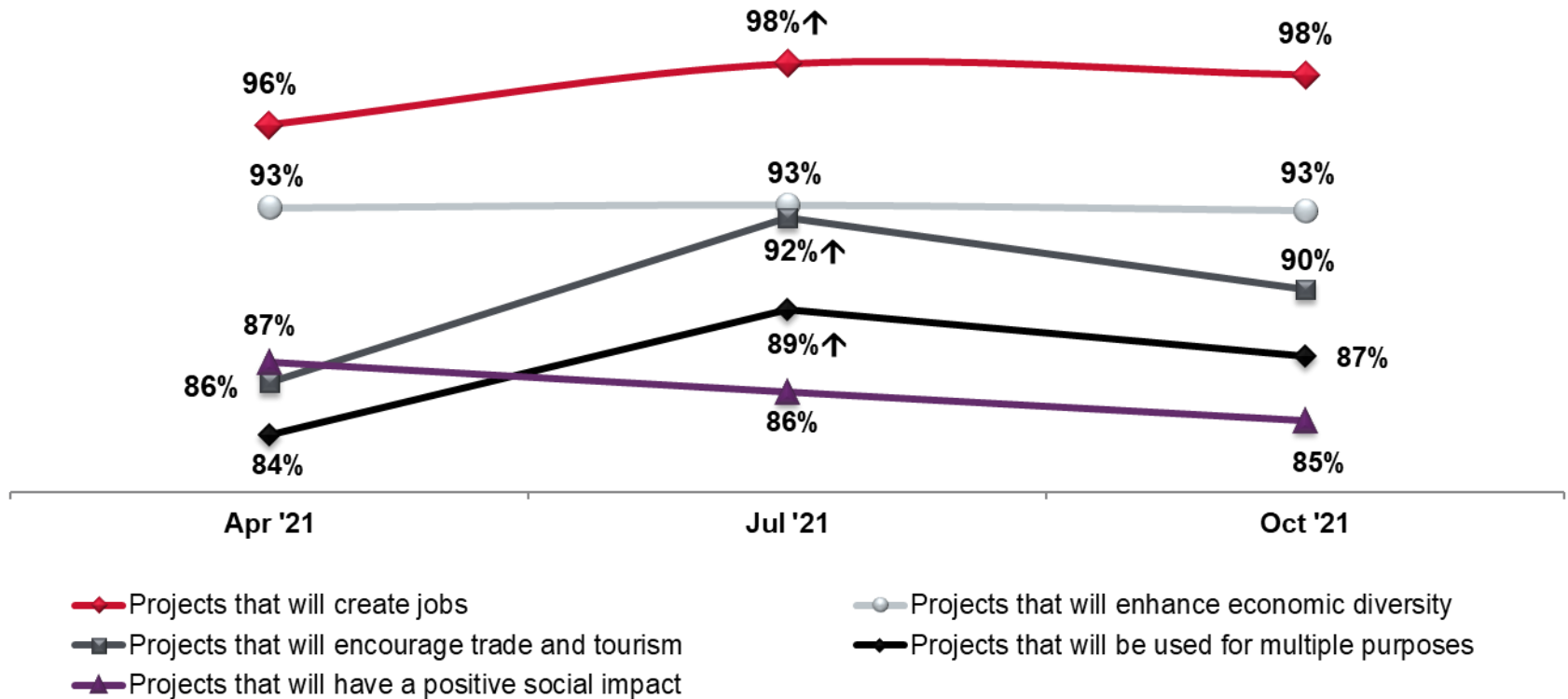
I12. The City of Calgary prioritizes investment in infrastructure projects on an ongoing basis. Please indicate the level of importance you would place on the following types of projects.
Base: all respondents (n=500)



Tracking Importance of Different Infrastructure Investments

Perceptions of the importance of all types of infrastructure projects are stable this survey wave compared to last survey wave, sustaining increases observed in July 2021.

Importance of Infrastructure Projects



I12. 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)

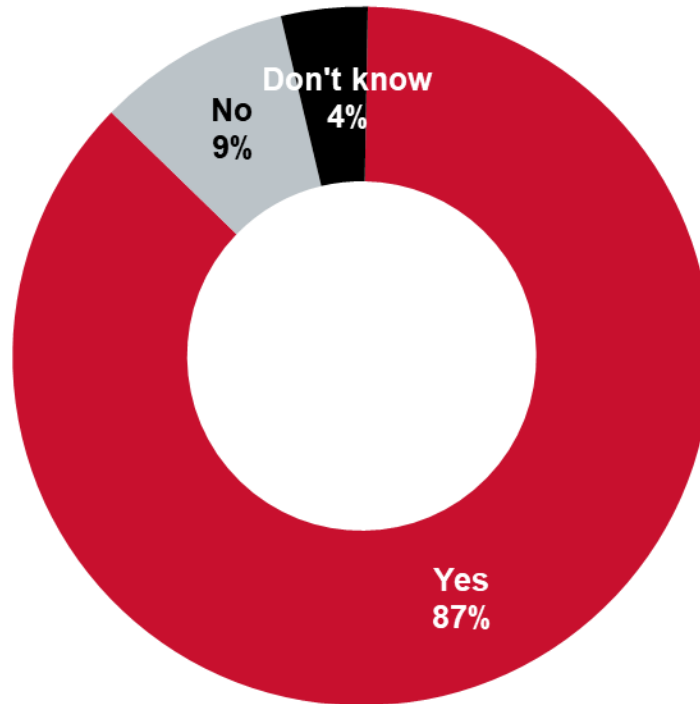
↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter



Investing Up-front in Infrastructure

A majority (87%) of respondents support more up-front investment on infrastructure projects to reduce maintenance costs and extend timelines for replacement, while one-in-ten (9%) of respondents do not support more up-front investment.

Support More Up-front Infrastructure Investment



I13. 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?

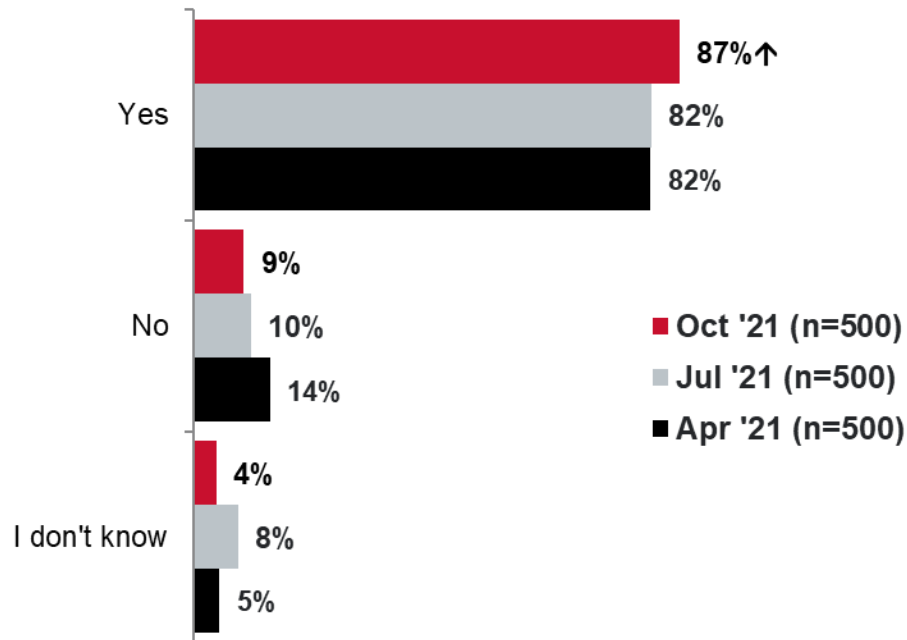
Base: all respondents (n=500)



Tracking Investing Up-front in Infrastructure

Support for more up-front investment on infrastructure projects has increased compared to the last survey wave fielded in July 2021.

Support More Up-front Infrastructure Investment



I13. 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 a previous quarter
 ↓ Statistically lower than a previous quarter



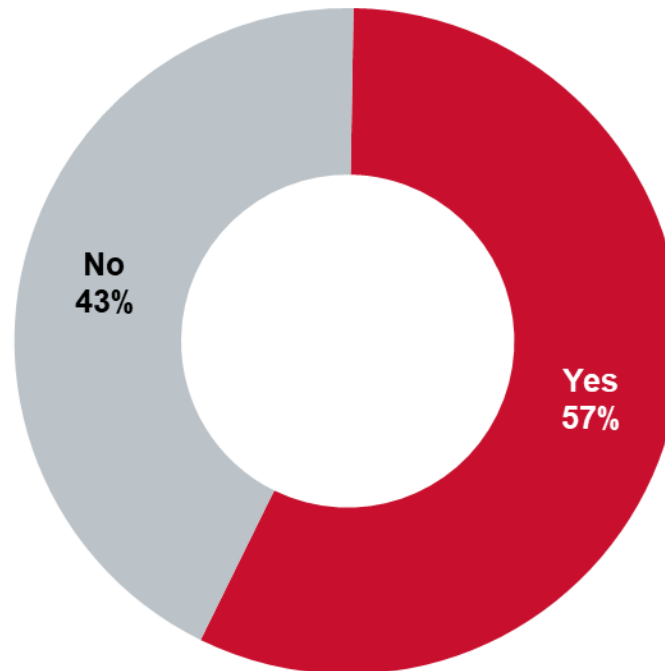
Taxes and User Fees



Awareness of City Collecting Provincial Property Tax

About three-in-five respondents are aware (57%) that The City collects provincial property tax on behalf of the Province.

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



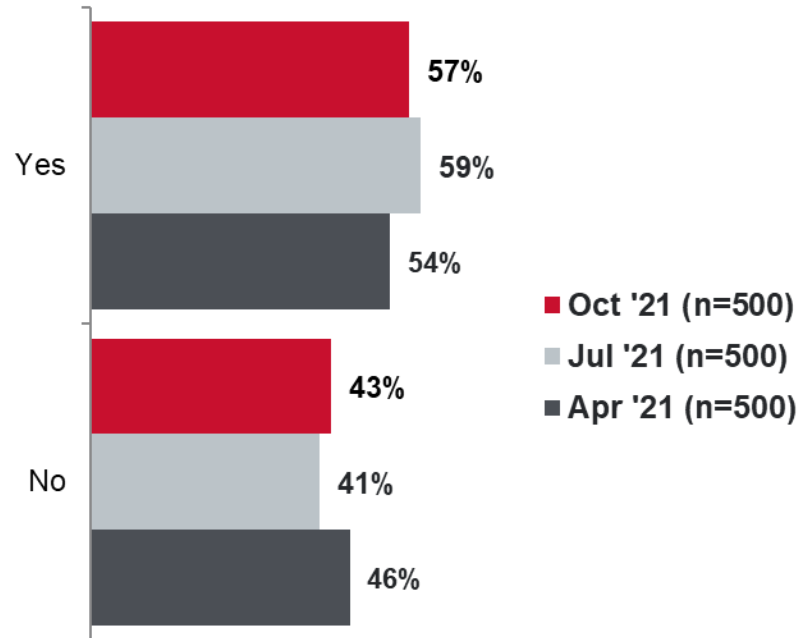
PT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
Base: all respondents (n=500)



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 been consistent since tracking began in April 2021.

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



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

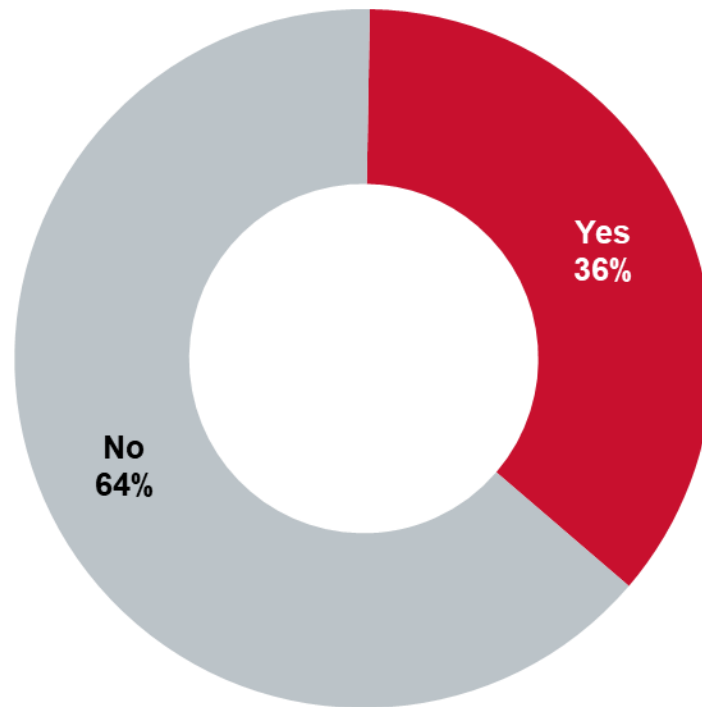
Base: all respondents (n=500)



Awareness of City Tax Allocation to the Province

Over one-third (36%) of respondents are aware that 40% of tax collected by The City are transferred to the Province.

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



PT2. Were you aware that approximately 40 per cent of taxes The City collects is transferred to the Province?

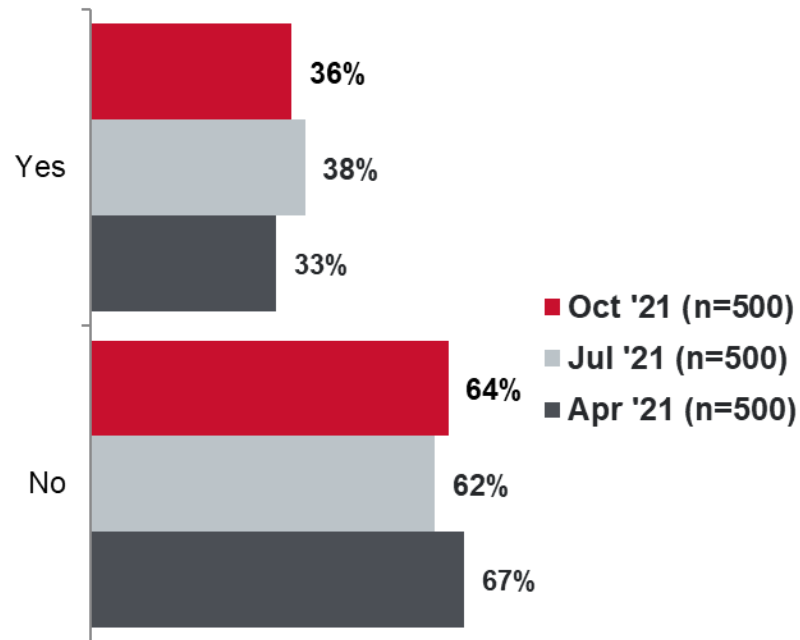
Base: all respondents (n=500)



Tracking Awareness of City Tax Allocation to Province

The proportion of those who are aware that 40% of tax collected by The City are transferred to the Province has been consistent since tracking began in April 2021.

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

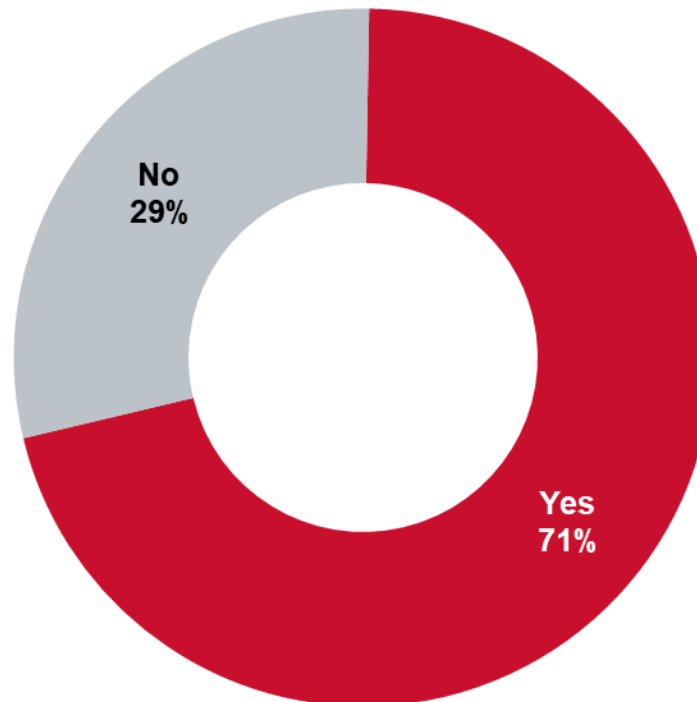


PT2. Were you aware that approximately 40 per cent of taxes The City collects is transferred to the Province?
 Base: all respondents (n=500)

Awareness of How City Services are Funded

Seven-in-ten (71%) respondents 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.

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



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?

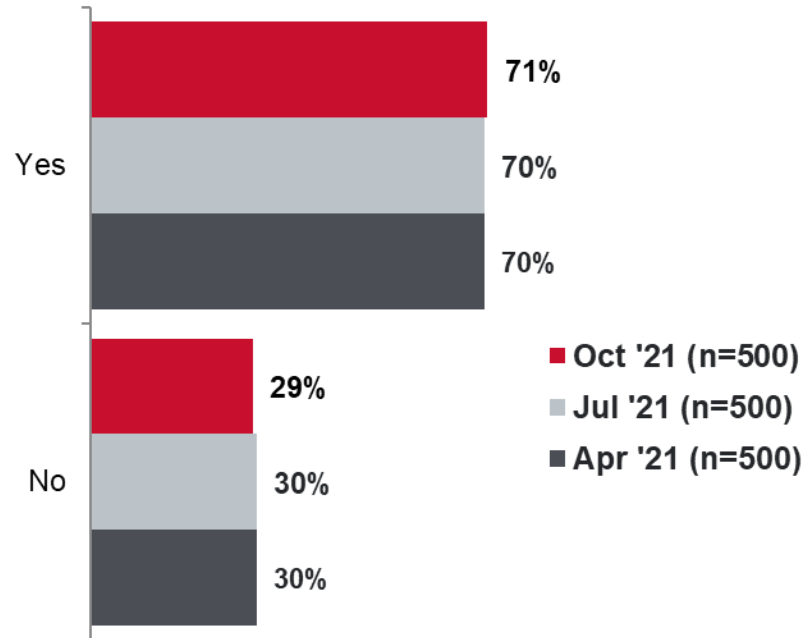
Base: all respondents (n=500)



Tracking Awareness of How City Services are Funded

Levels of awareness of how City services are funded remains unchanged since tracking began in April 2021.

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



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?

Base: all respondents (n=500)

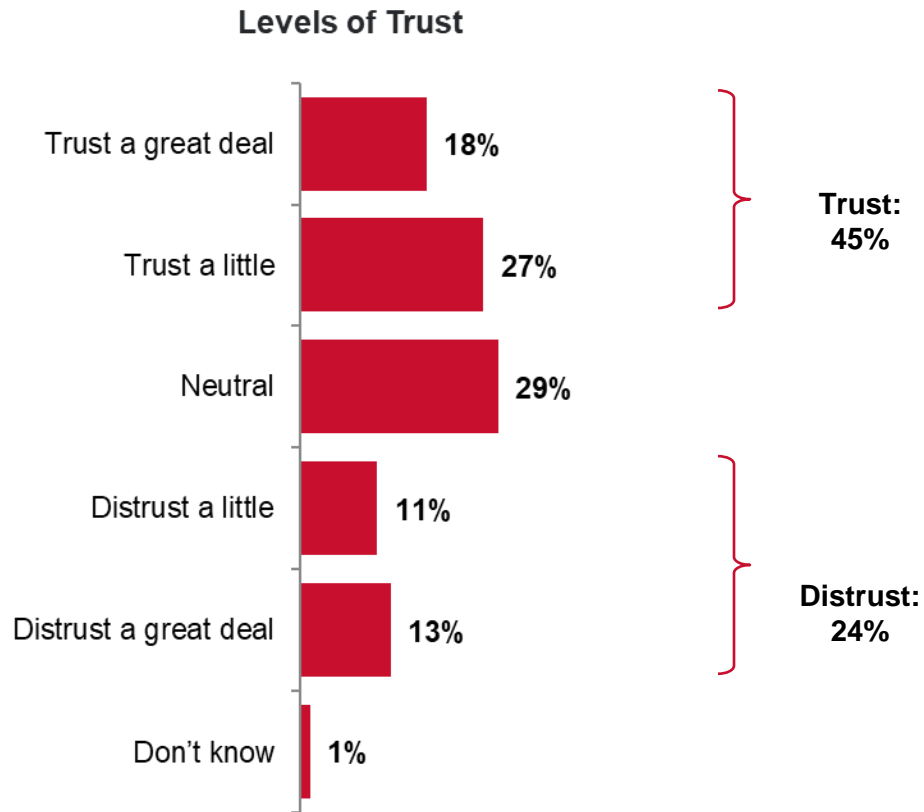


Trust and Reputation



Levels of Trust in The City

Just under half (45%) of respondents say they trust The City, while one-quarter (24%) say they distrust The City. A similar proportion (29%) feel neutral.



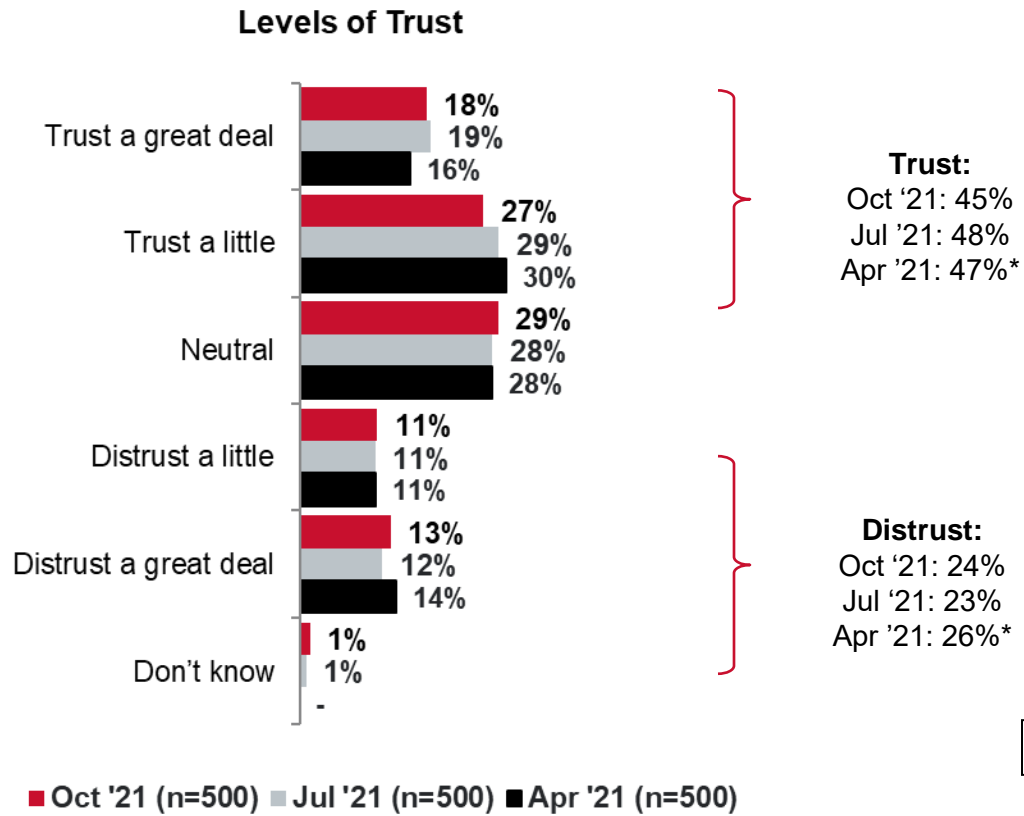
TR1. Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

Base: all respondents (n=500)



Tracking Levels of Trust in The City

Levels of trust in The City are consistent compared to the last survey wave fielded in July 2021.



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

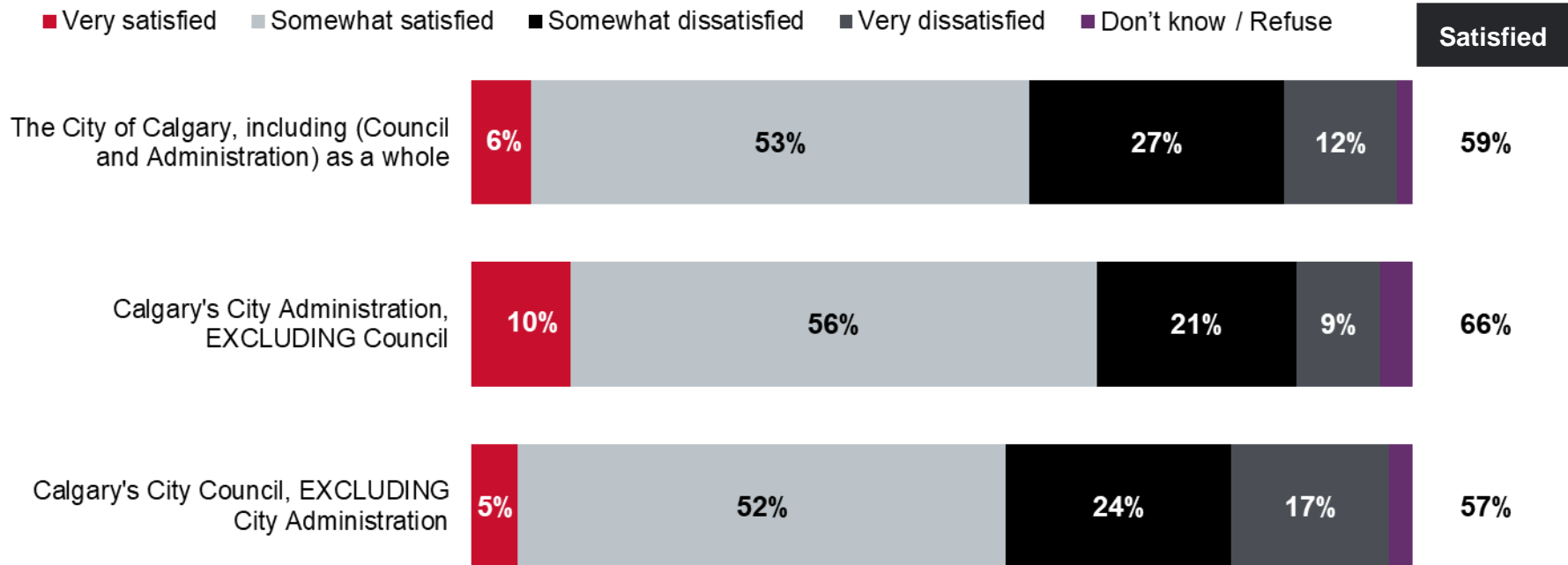
Base: all respondents (n=500)



Satisfaction with The City

Three-in-five (59%) respondents say they are satisfied with how The City (including both Council and Administration) are running the city. Two-thirds (66%) of respondents say they are satisfied with how City Administration (excluding Council) is running our city, while just under three-in-five (57%) say they are satisfied with how Council (excluding City Administration) is running our city.

Satisfaction with Each Group



Note: 3% and lower not labelled

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

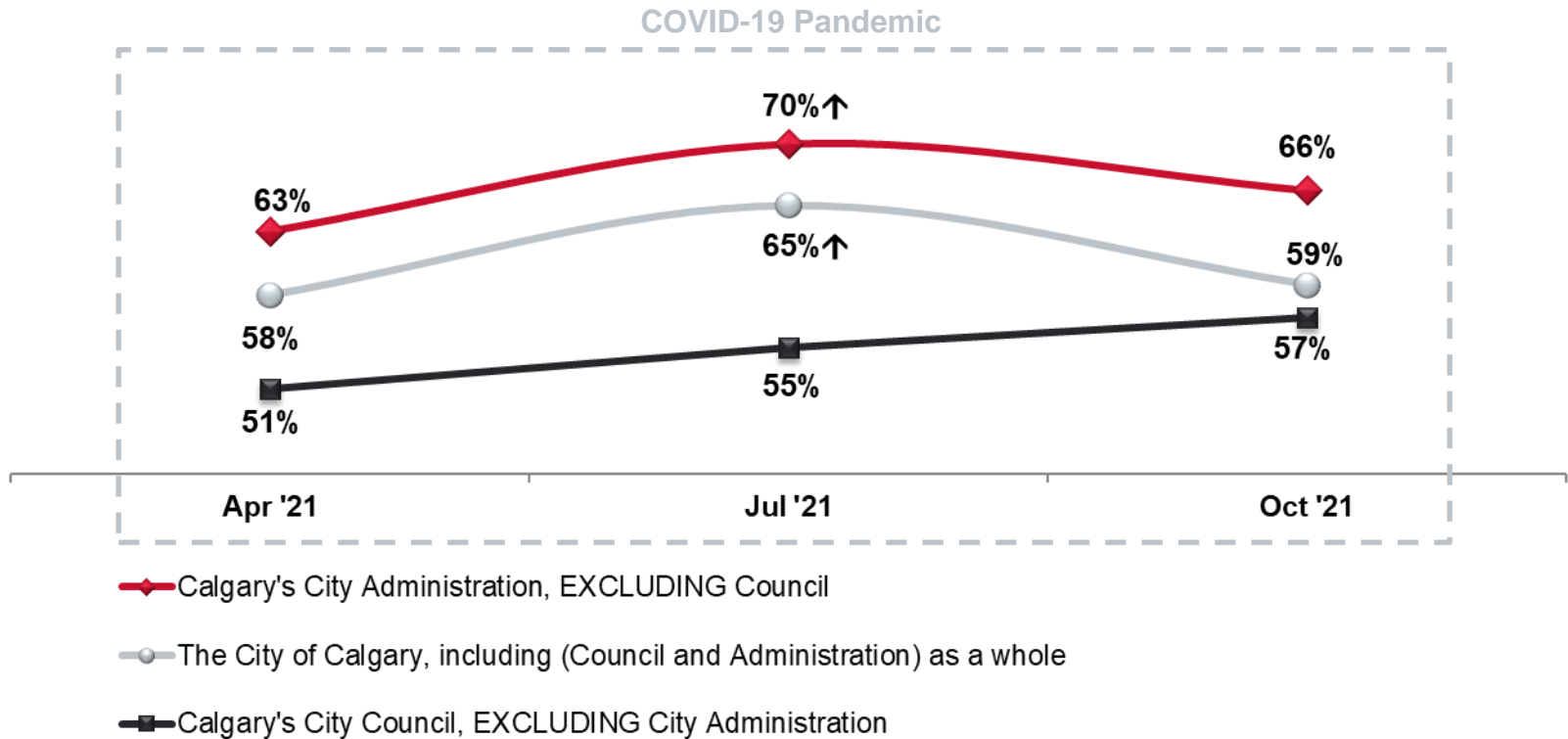
Base: all respondents (n=500)



Tracking Satisfaction with The City

Levels of satisfaction with how City Administration, The City (including both Council and Administration), and City Council are “going about running our city” is stable compared to the last survey fielded in July 2021.

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



TR2. 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)

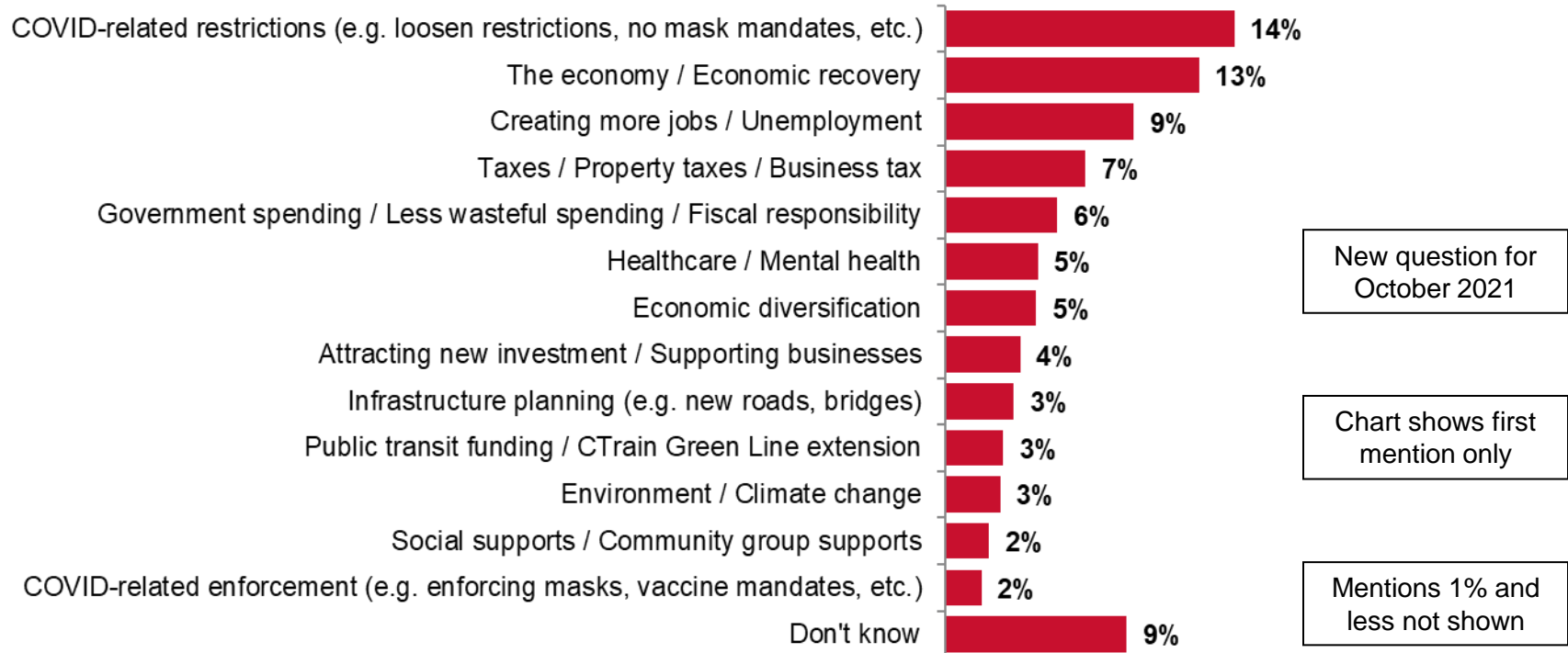
↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter



Focus for New Council and Mayor

When asked the most important issue that the new Council and Mayor should focus on right away, top mentions were COVID-related restrictions (14%), the economy and its recovery (13%), and creating more jobs or addressing unemployment (9%).

Most Important Issues



New question for October 2021

Chart shows first mention only

Mentions 1% and less not shown

TR3. As a resident of the city of Calgary, what do you think is the most important issue that the new Council and Mayor should focus on right away? That is, what issue should receive the greatest attention from your new local leaders? (open-ended question)

Base: all respondents (n=500)

Demographics



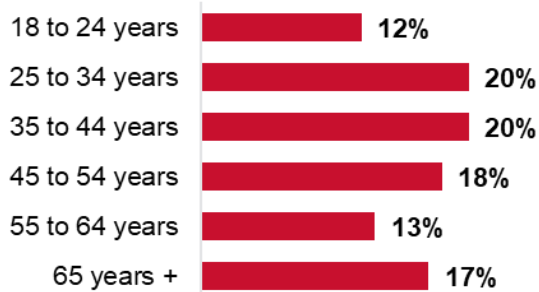


Demographics

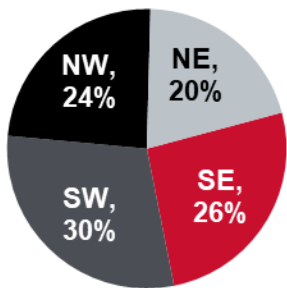
GENDER

Male	49%
Female	50%
Prefer to self identify	1%

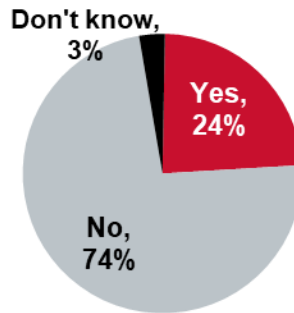
AGE



QUADRANT



VISIBLE MINORITY



CHILDREN IN HOUSEHOLD

Yes	34%
No	66%

SENIOR IN HOUSEHOLD

Yes	27%
No	73%

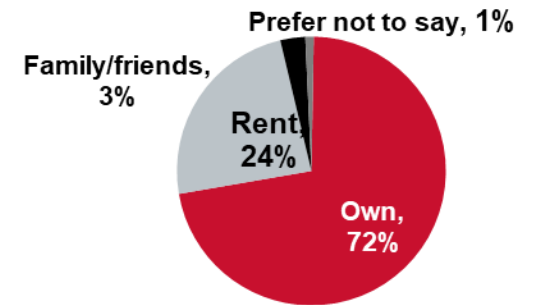
TENURE IN CALGARY



RESPONSIBLE FOR PROPERTY TAX/RENT



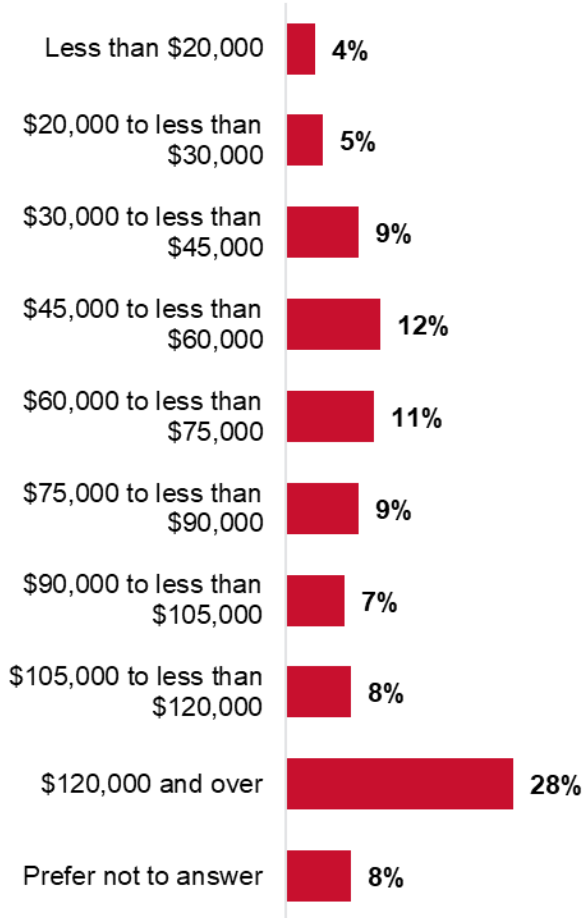
RESIDENCE





Demographics

ANNUAL INCOME



EDUCATION



Completed High School or Less 15%

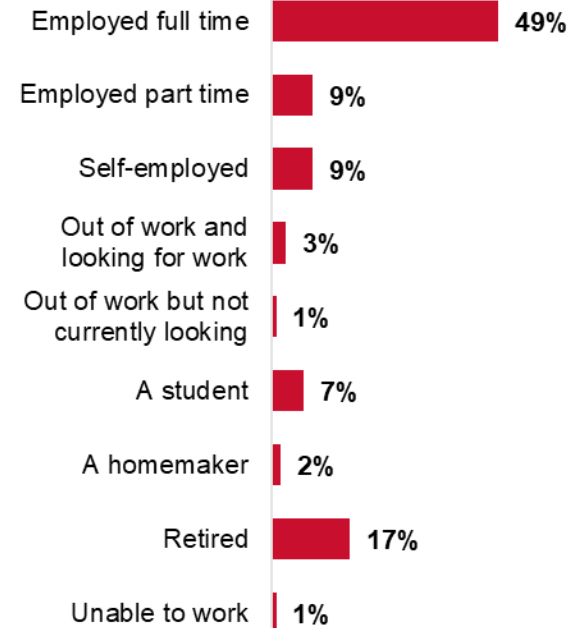


Some Post-Secondary or Completed a College Diploma 34%



Completed University Degree or Post-Graduate Degree 49%

EMPLOYMENT STATUS

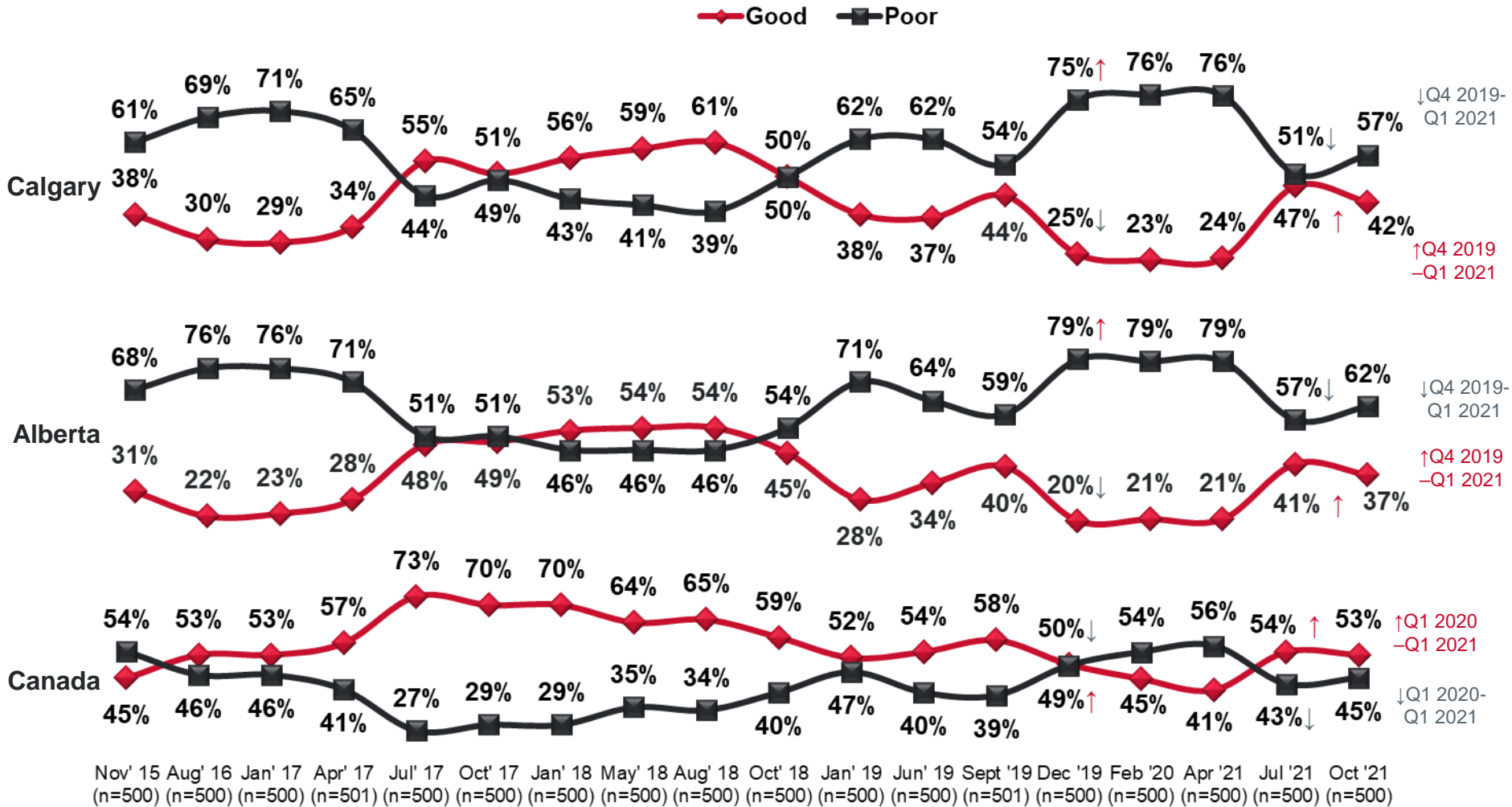


Appendix A: Tracking





Tracking Current Economic Situation

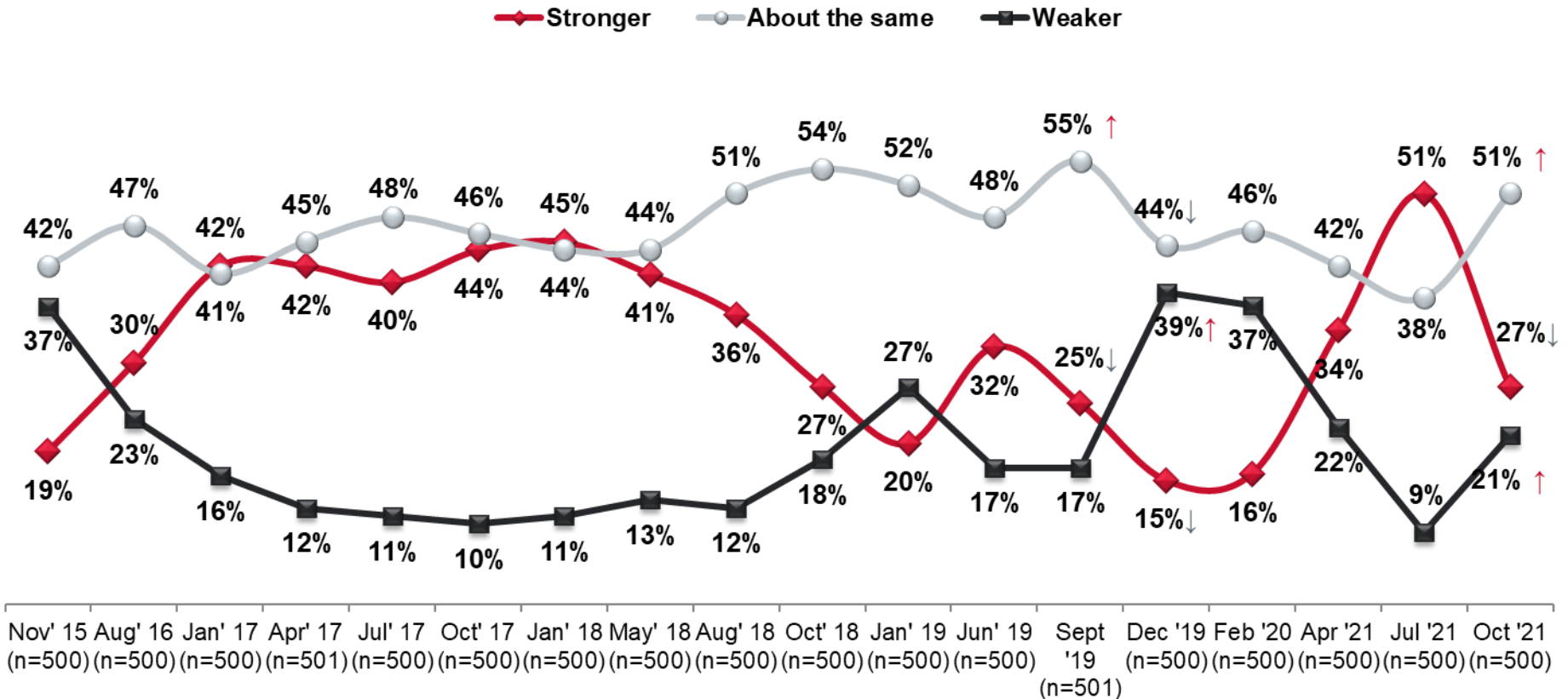


Q6. How would you describe the current economic situation in...?
 Base: all respondents (n=500-501)

↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter



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 a previous quarter
↓ Statistically lower than a previous quarter



Tracking Future Economy in Calgary

	% Agree															
	Jan 2017	Apr 2017	Jul 2017	Oct 2017	Jan 2018	May 2018	Aug 2018	Oct 2018	Jan 2019	Jun 2019	Sept 2019	Dec 2019	Feb 2020	Apr 2021	Jul 2021	Oct 2021
It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy	87%	93%	91%	93%	92%	91%	93%	90%	89%	90%	94%	91%	92%	87%	89%	87%
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	78%	74%	78%	79%	76%	74%	73%	70%	67%	67%	63%	66%	68%	68%	74%	72%
I trust The City of Calgary to make the right decisions to help our city through this economic recovery	74%	72%	73%	74%	71%	69%	66%	65%	63%	65%	64%	59%	↑66%	63%	69%	66%
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 2021												66%	67%	67%	
The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery	Added in Apr 2021												60%	64%	62%	
The City of Calgary is making an effort to reduce the cost of local government	Added in Apr 2021												40%	45%	44%	

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 respondednts (Dec 2019 n=500, Sept 2019 n=501, Jan 2017 – Jun 2019 n=500, Sept '19 n=501, Dec '19 - Feb '20 n=500, Apr '21 n=500, Jul '21 n=500, Oct '21 n=500)

↑ Statistically higher than a previous quarter
↓ Statistically lower than a previous quarter



Tracking Perceptions of the Economic Recovery in Calgary

	% Agree															
	Jan 2017	Apr 2017	Jul 2017	Oct 2017	Jan 2018	May 2018	Aug 2018	Oct 2018	Jan 2019	Jun 2019	Sept 2019	Dec 2019	Feb 2020	Apr 2021	Jul 2021	Oct 2021
Now is a good time for companies to be investing in Calgary	74%	71%	80%	82%	74%	73%	73%	73%	64%	70%	72%	65%	62%	71%↑	76%	72%
Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today	39%	38%	39%	32%	32%	35%	35%	42%	54%	37%	↑45%	65%	60%	49%↓	27%↓	42%↑
Now is a good time to start a new business in Calgary	36%	43%	48%	46%	46%	44%	44%	42%	30%	35%	36%	30%	31%	33%	45%↑	34%↓
Calgary as a city is attracting enough investment from outside of the province to help our economy	Added in Apr 2021													29%	40%↑	35%

↑ Statistically higher than a previous quarter
 ↓ Statistically lower than a previous quarter

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 (Dec 2019 n=500, Sept 2019 n=501, Jan 2017 – Jun 2019 n=500, Sept '19 n=501, Dec '19 - Feb '20 n=500, Apr '21 n=500, Jul '21 n=500, Oct '21 n=500)

Appendix B: Questionnaire





Questionnaire

The City of Calgary
Economic Perspectives Research: Q3 2021 (October)

PROJECT 40091-214

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.

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 "2021 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 "2021 Economic Perspectives Survey." City Staff would be happy to address your concerns.)

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

ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

Q57

[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]

Q54

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



ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

Q51

[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 – Q3 2021 (OCTOBER) - 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
- (Q9D)** 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
- (Q9C)** 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 – Q3 2021 (OCTOBER) - 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

ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

C. PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

9. (I1) 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. (I2A-I2E) 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. (I3) 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



ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

D. PERSPECTIVES OF TRUST AND REPUTATION

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)

14. (TR3) As you may know, Calgaryans will elect a new Council and a new Mayor in the upcoming municipal election taking place on October 18, 2021. As a resident of the city of Calgary, what do you think is the most important issue that the new Council and Mayor should focus on right away? That is, what issue should receive the greatest attention from your new local leaders? [RECORD FIRST RESPONSE] Anything else?

[OPEN END]

ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - 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. (QD3) Do you own or rent your current place of residence?

- 1 Own
- 2 Rent
- 3 (DO NOT READ) Neither / Other (Please specify)
- 9 (DO NOT READ) Don't know / Refusal

- QD2. (QD4) 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

- QD3. (QD5) What is the highest level of schooling that you have obtained? (READ LIST)

- Completed high school or less
- Some post-secondary including college, technical institute, or university |
- Completed diploma, certificate, apprenticeship
- Completed university degree or post-grad degree
- Don't know / Refusal (DO NOT READ)

- QD4. (QD12) What best describes your employment status? Would you say you are...

- 1 Employed full time
- 2 Employed part time
- 3 Self-employed
- 4 A homemaker
- 5 Out of work and looking for work
- 6 Out of work but not currently looking for work
- 10 A full-time student
- 11 A part-time student
- 8 Retired
- 9 Unable to work
- 96 Other (specify)
- 99 Don't know / Refusal (DO NOT READ)

- QD5. (QD6) 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)

(INTERVIEWER NOTE: To improve flow please do not read the "Just under" and do not read the first "thousand"...so it should sound like this, "thirty to forty-five thousand; forty-five to sixty thousand...etc..")

- 1 Less than \$20,000
- 2 \$20,000 to less than \$30,000
- 3 \$30,000 to less than \$45,000
- 4 \$45,000 to less than \$60,000
- 5 \$60,000 to less than \$75,000
- 6 \$75,000 to less than \$90,000
- 7 \$90,000 to less than \$105,000



ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

- 8 \$105,000 to less than \$120,000
- 9 \$120,000 and over
- 99 Don't know / Refusal

QD6. (QD2) Do you have any children under the age of 18 living in your household?

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

[SKIP IF OVER 65 AT Q54]

QD7. (QD13) Is there anyone aged 65 years or older living in your household?

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

QD8. (QD9) Do you own or operate your own business?

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

QD9. (QD8) 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)

QD10. (QD11) What is your gender?

(INTERVIEWER: 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
- 01 – Male
 - 02 – Female
 - 96 – Other – please specify
 - 99 – Refused / prefer not to say (DO NOT READ)

QD11A. Do you consider yourself a member of a visible minority?

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

QD11B. As you know, Canadians come from many different ethnic backgrounds. What is your main ethnic background? (DO NOT READ LIST. ACCEPT UP TO 2 RESPONSES.) (PROBE TO CLARIFY ONLY IF NECESSARY)

(IF NECESSARY: Ethnic background refers to where your family is from and is usually determined based on common ancestry or cultural origin).

- 1 Canadian/French Canadian
- 2 Caucasian/White

ECONOMIC PERSPECTIVES SURVEY – Q3 2021 (OCTOBER) - FINAL

- 3 British (English/Scottish/Welsh/Irish)
- 4 Western European (from Austria, Belgium, France, Germany, Netherlands, or other)
- 5 Southern or Eastern European (from Greece, Italy, Portugal, Spain, Bosnia, Croatia, Serbia, Czech Republic, Hungary, Poland, Slovakia, Ukraine, former Soviet Republics, or other)
- 6 South Asian (Punjabi, Indian, Tamil, Sri Lankan, Pakistani, Bangladeshi, Nepalese)
- 7 East or Southeast Asian (from China, Hong Kong, Japan, North or South Korea, Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, or other)
- 8 West Asian or Middle Eastern (from Afghanistan, Iran, Iraq, Israel, Lebanon, Saudi Arabia, Syria, Turkey, or other)
- 9 African
- 10 Central/South American or Caribbean (from Argentina, Brazil, Columbia, El Salvador, Guatemala, Mexico, Venezuela, Barbados, Jamaica, or other)
- 11 Aboriginal/First Nations/Métis
- 95 Other (Specify)
- 99 Refused

QD12. (QD10) Finally, would you be interested in participating in future research related to The City of Calgary?

- Yes
- No [THANK AND END SURVEY]
- Don't know / Refusal (DO NOT READ)

[IF "YES" ASK D12A and D12B and D12C, ELSE SKIP TO CLOSE]

QD12A. (QD10A) Could I please have an email address where we can contact you?

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT.]

QD12B. (QD10B/QD10C) Could I please have your first name and a telephone number you can be best reached at?

[RECORD FIRST NAME AND CONFIRM/CHANGE TELEPHONE NUMBER]

QD12C. (QD10D) Is this phone number a cell phone or a landline?

- Cell phone
- Landline
- Prefer not to answer

INT99. This completes the survey. Thank you very much for taking the time to provide feedback.