

Calgary



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ATTACHMENT 4

PHASE
2

Economic Perspectives Research Wave 1 Final Report

May 2022

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THE RESEARCH INTELLIGENCE GROUP



Economic Perspectives Survey: Wave 1 Highlights at a Glance

QUALITY OF LIFE & ECONOMY



74%
Rate **quality of life**
in Calgary as “good”



53%
Rate the **economy** in
Calgary as “good”



39% Expect the economy in Calgary to
be **stronger** in the next six months

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



50% Agree that now is a good time to
start a new business in Calgary



42% Agree Calgary is attracting enough
investment from outside of the province
to help our economy



41% Agree The City of Calgary is making
an effort to reduce the cost of local
government

TAXES AND USER FEES



56%
Aware that The City collects
provincial property tax on
behalf of the Province



35%
Are aware forty per cent of taxes
collected by The City are
transferred to the Province

TRUST & SATISFACTION WITH THE CITY



40%
Say they **trust**
The City



68%
Satisfied with the
performance of
Calgary's **City
Administration**
EXCLUDING Council



61%
Satisfied with the performance of City
Administration and Council as a whole



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Data Collection

- Telephone interviews were conducted with a randomly selected sample of n=500 Calgarians between March 30th and April 13th, 2022.
- Interviews were conducted using 31% landline sample and 69% cell phone sample.
- Average length of the interview was 16 minutes.

Target Audience

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

Analysis

- Data were weighted by age, gender, and quadrant based on the latest City census.
- The margin of error for the study is $\pm 4.4\%$, 19 times out of 20.
- Tracking data are shown where possible and are sourced from previous reports (supplied by The City of Calgary).
- Throughout the report, \downarrow denotes a significant decrease from previous wave and \uparrow denotes a significant increase from the previous wave, unless otherwise specified.
- To understand how results vary by equity of Calgarians, results were analyzed by ages 65+ (seniors) vs. those under 65, income level, tenure in Calgary, children in household, and those who identify as racialized. Significant differences are noted in the analysis where applicable.

Appendices

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

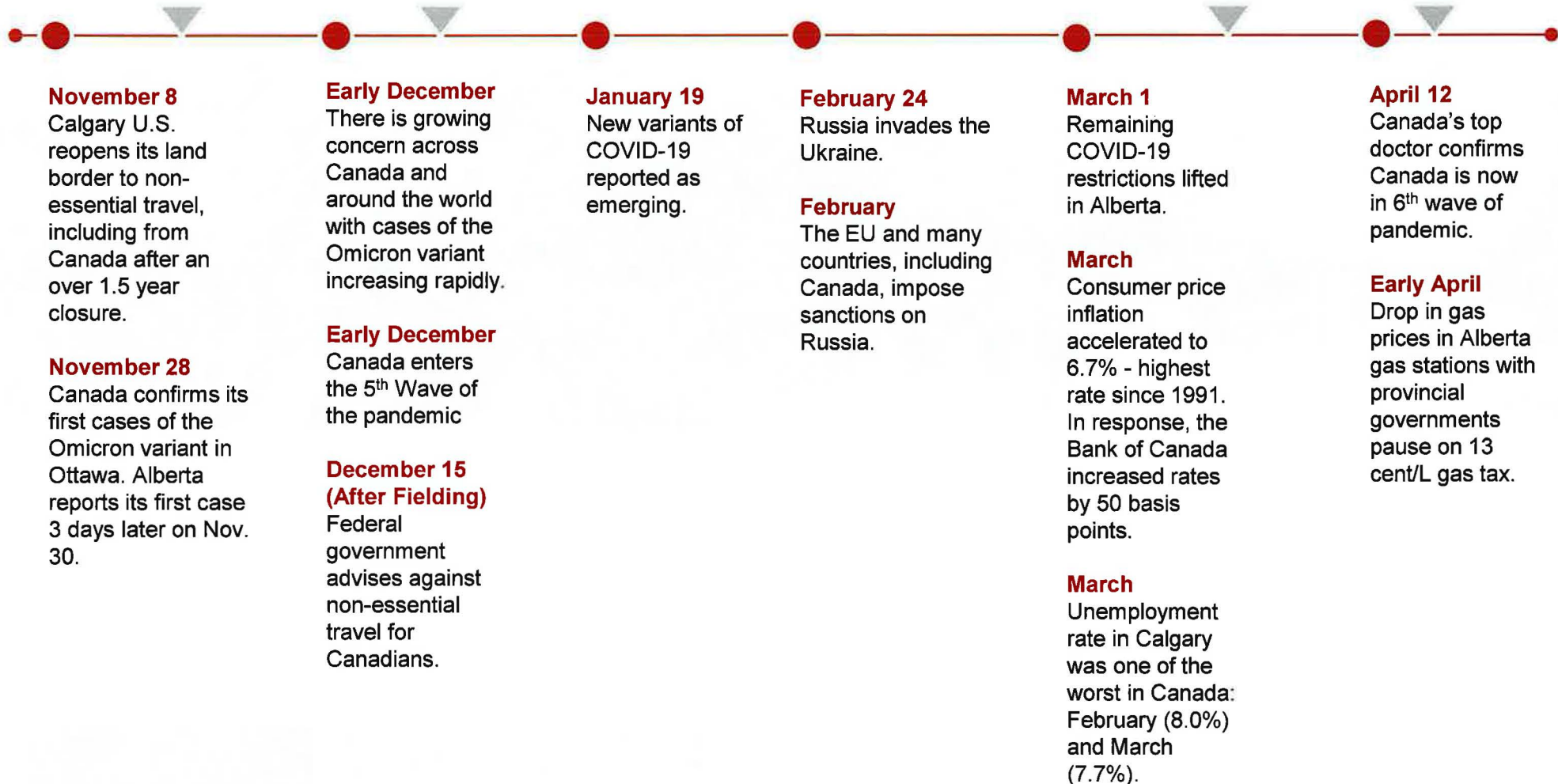




Survey Context: April 2022

Economic Perspectives Wave 4 Field November 30th to December 14th

Economic Perspectives Wave 1 Field March 30th to April 13th





Summary of Findings





Summary of Findings: Quality of Life and the Economy

Despite additional waves of the pandemic, record-high inflation and gas prices, and greater global market uncertainty, Calgarians continue to report a high quality of life.

- Approximately three-quarters (74%) rated the overall quality of life in Calgary as “good” consistent with the last wave of this survey in December 2021 (77%); 7% rated it as “poor”.
- These ratings have remained consistent since April 2021.

Calgarians continue to have a more positive perception of the economy in Calgary and Alberta than in previous survey waves. Looking to the future, significantly more residents expect the local economy to become even stronger within the next six months.

- Slightly over one-half (53%) feel that the current economic situation in Calgary is “good.”
- Positive perceptions of Calgary’s and Alberta’s economies have trended upward, significantly improving from pre-pandemic levels (23% for Calgary and 21% for Alberta in February 2020) to current levels (53% for Calgary; 47% for Alberta).
- Two-in-five (39%) have a positive outlook on Calgary’s economy six months in the future, expecting it to become stronger; this perception increased in April 2022, up from 33% in December 2021.
- Most (43%) continue to expect the economy to be “about the same” in six months’ time.



Summary of Findings: Economy and Role of the Government

Compared to December 2021, Calgarians continue to believe that now is a good time to start a new business in Calgary and for companies to invest in Calgary.

- Four-in-five (80%) Calgarians believe that now is a good time for companies to be investing in Calgary. However, less than one-half (42%) feel that Calgary is attracting enough investment from outside of the province to help the economy.
- While one-half (50%) believe that now is a good time to start a new business in Calgary, one-third (32%) believe that the unemployment rate will worsen in six months' time.

Calgarians have an increased interest in infrastructure investment, specifically as it relates to projects that will create jobs and projects that will be used for multiple purposes.

- After a decline observed last wave in December 2021, interest in projects that will create jobs has increased from a very high rating of 93% up to an even higher level of interest and importance (96%).
- Most (69%) continue to believe that it is a “good time” for the City to invest in new infrastructure projects, such as roads, public transportation and local facilities, up-front infrastructure to reduce maintenance costs and extend timelines for replacement (83%); this is consistent with results reported in the previous wave.

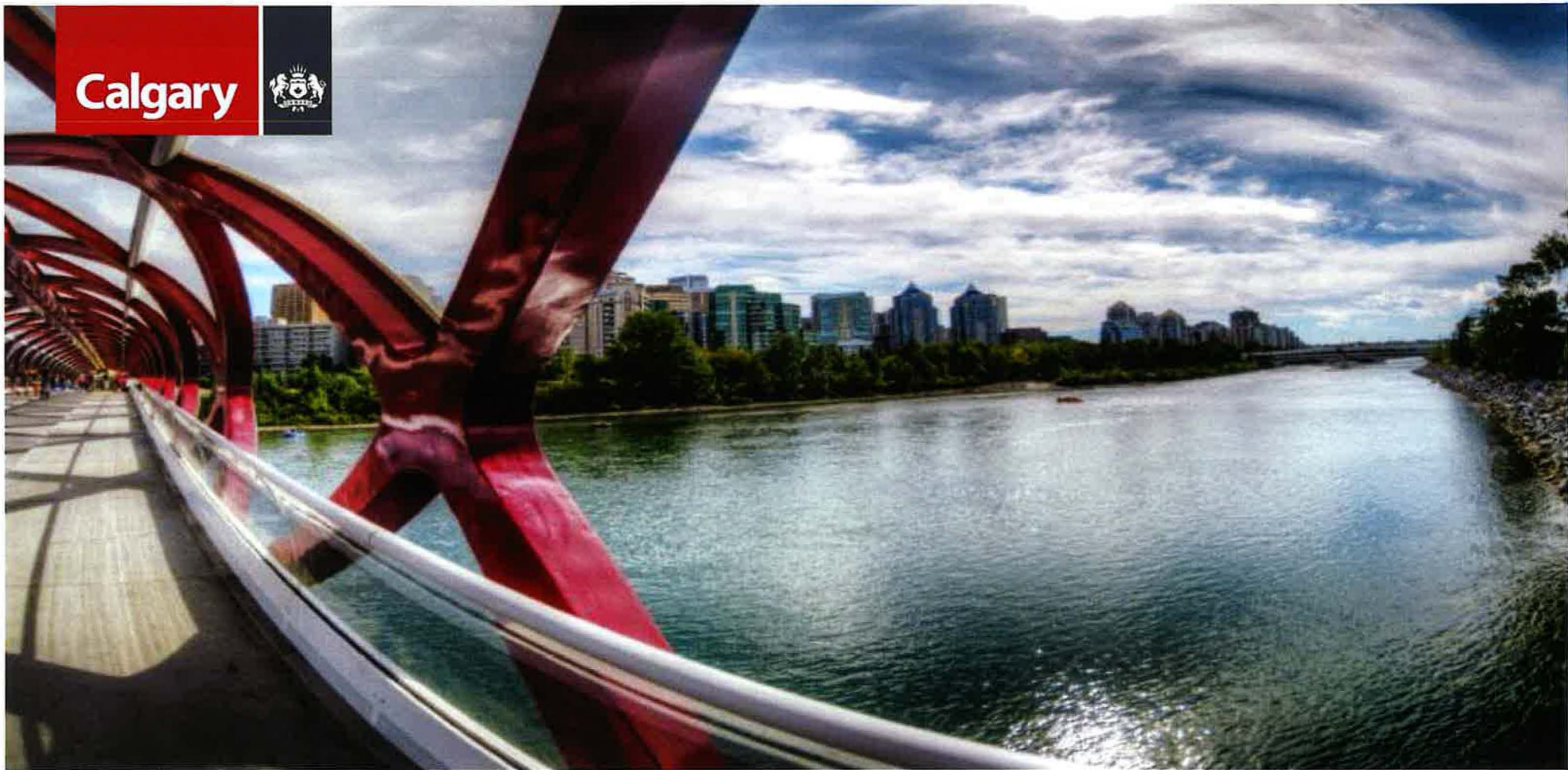


Summary of Findings: Taxes, User Fees, and Trust

Trust in The City of Calgary overall has significantly declined. However, satisfaction in terms of City Administration, City Council and The City of Calgary as a whole has remained consistent.

- Trust in The City of Calgary overall has declined to 40% in April 2022, down from 47% in December 2021.
- Two-thirds (68%) are satisfied with how City Administration (excluding Council) has gone about running Calgary while three-fifths (61%) are satisfied with The City as a whole and more than one-half (55%) are satisfied with City Council.





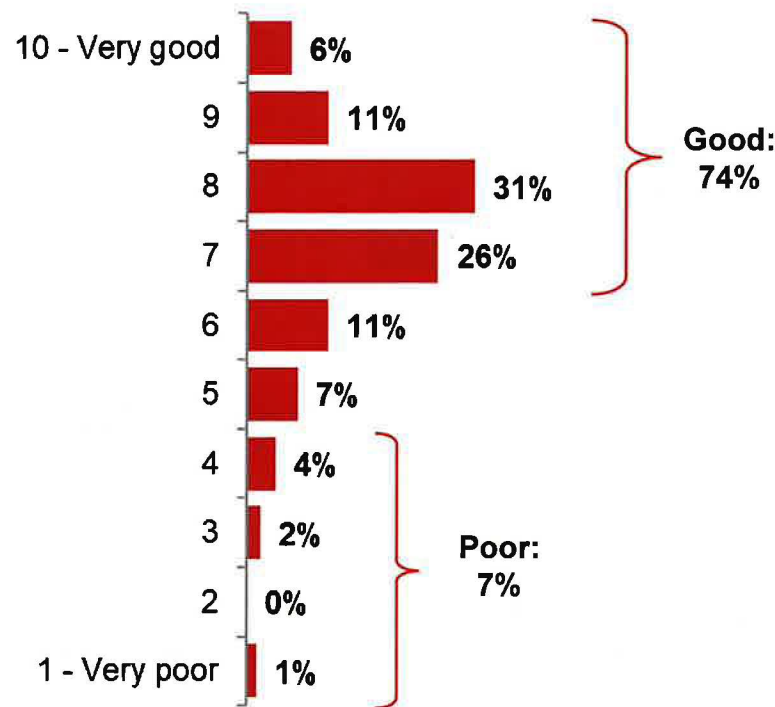
Quality of Life



Overall Quality of Life in Calgary

Overall perception of quality of life in Calgary is generally good for most residents (74%) while a minority (7%) of residents disagree, rating it as “poor.” Households with higher income (\$120,000+) are more likely to report a “good” quality of life in Calgary (85%), significantly more than households with an income under \$120,000 (69% \$60,000-\$120,000; 68% less than \$60,000). Those who identify as racialized have a less positive (good) rating of 66% (vs. 78% not racialized).

Rating of Quality of Life in Calgary



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

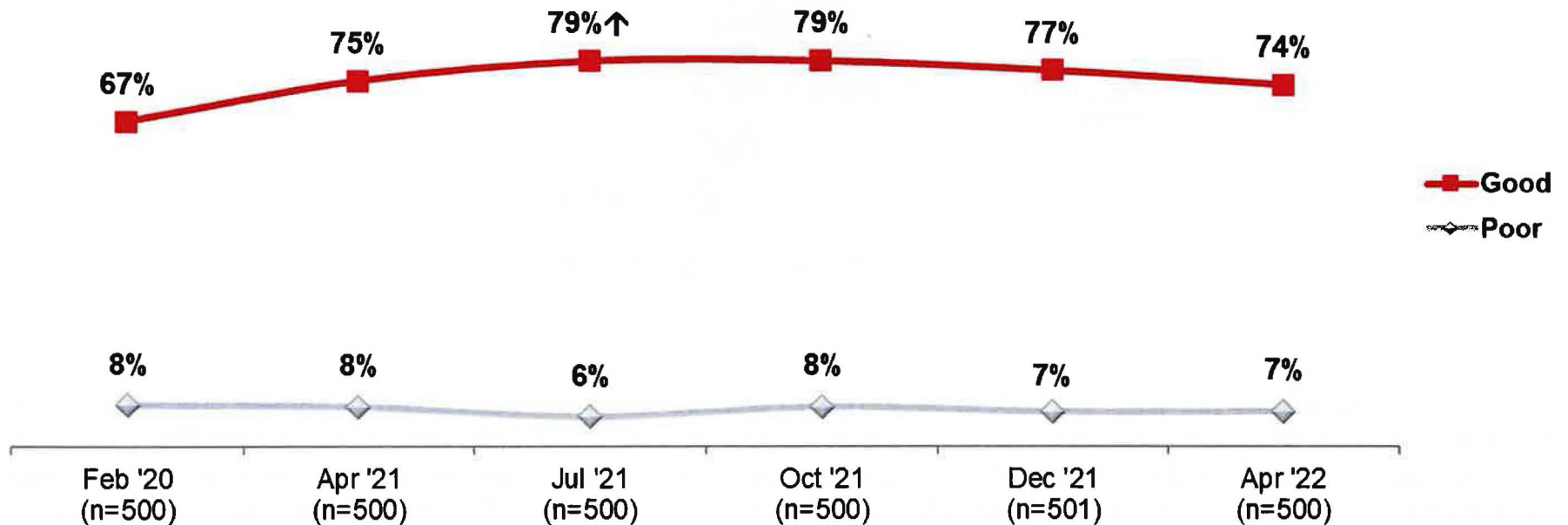
Base: all respondents (n=500)



Tracking Overall Quality of Life in Calgary

A similar proportion of Calgarians rated the overall quality of life in Calgary as “good” in this survey wave (74%) compared to last December 2021 (77%). A positive quality of life rating in Calgary has been reported at a consistent, relatively high level among Calgarians over the past year (since April 2021; 75%).

Ratings of Quality of Life of Calgary



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

Base: all respondents

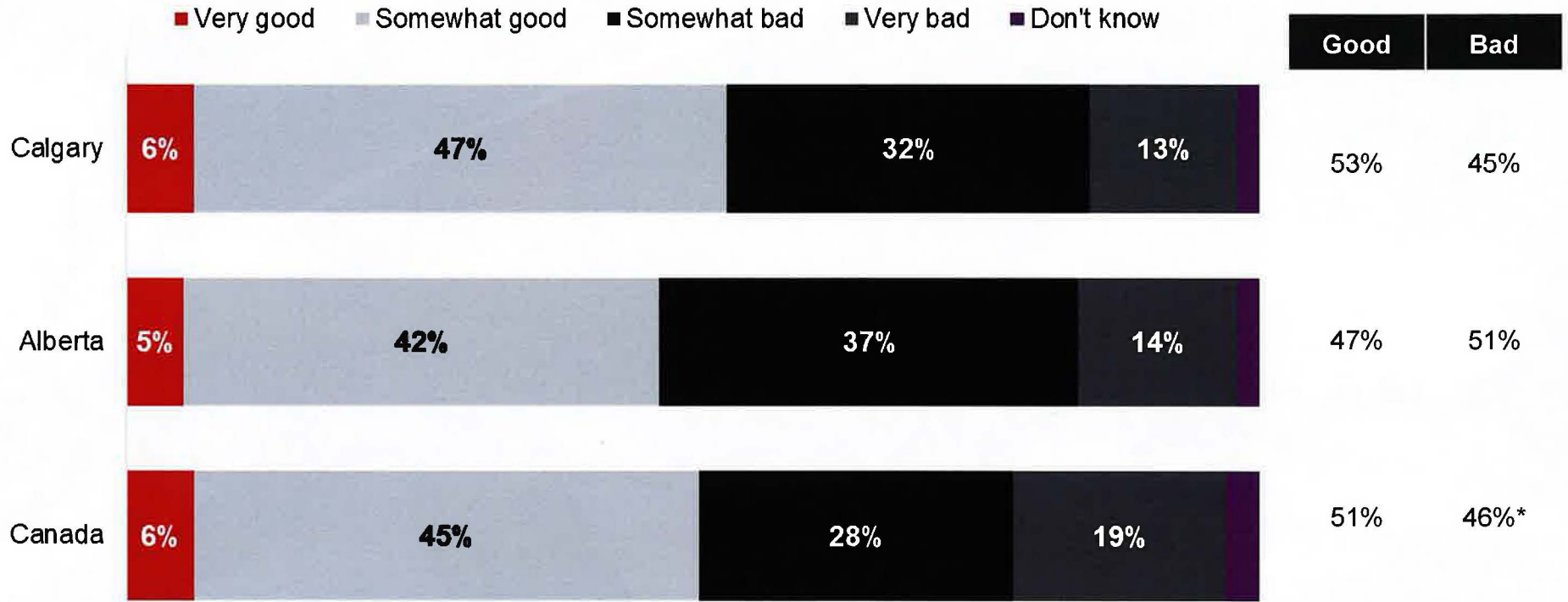
↑ Statistically higher than a previous wave
 ↓ Statistically lower than a previous wave

The Economy and Economic Recovery

Current Economic Situation

Slightly over one-half (53%) of Calgarians feel that the current economic situation in Calgary is “good” while less than one-half (45%) have rated it as “bad.” Just under half (47%) rate the economic situation in Alberta as “good,” while one-half (51%) describe the current economic situation in Canada as “good.” Those who identify as racialized rate Alberta’s economic situation as “good” (58% vs. 44% non-racialized). Residents who have lived in Calgary for 20+ years are more pessimistic about the economic situations in all regions (54%-60% rated “bad”).

Rating Current Economic Situation



* Indicates rounding

Note: 3% and lower not labelled

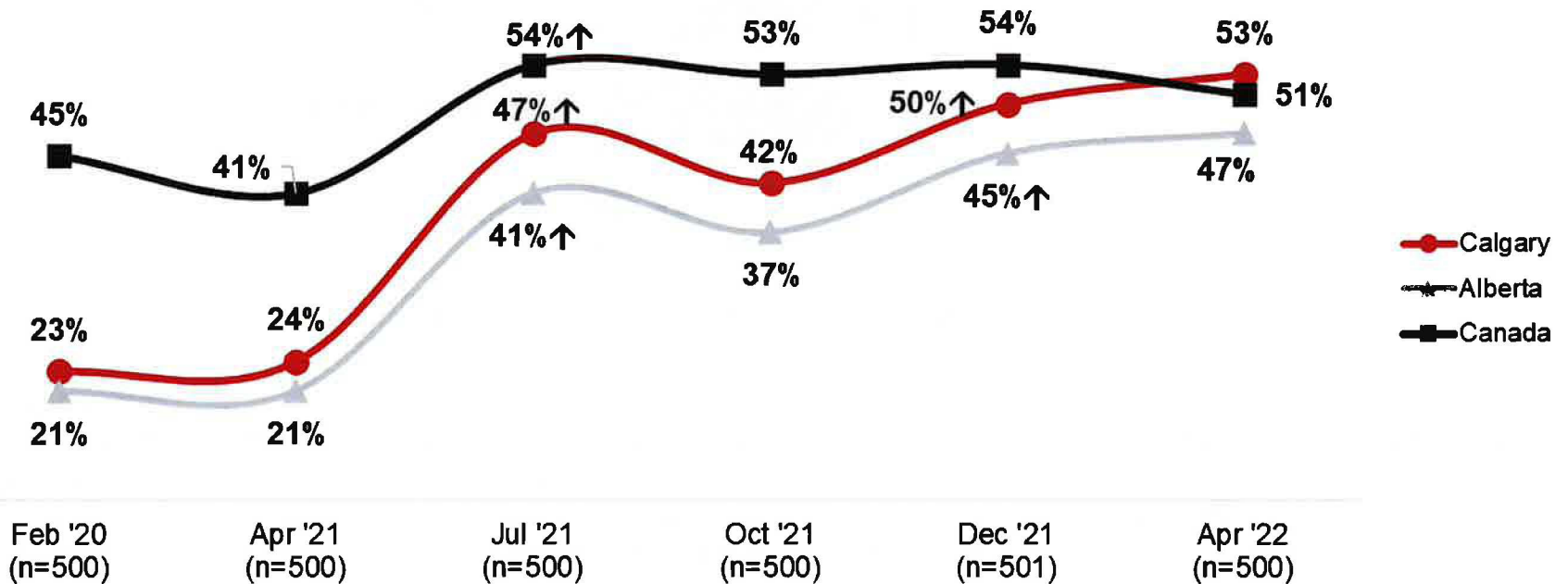
Q6. How would you describe the current economic situation in...?
Base: all respondents (n=500)



Tracking Current Economic Situation

“Good” ratings for the economic situation in Calgary, Alberta and Canada have all stayed on par with the last wave of this survey in December 2021. Perceptions of Calgary’s and Alberta’s economies have trended upward in the past 24 months, improving from pre-pandemic (February 2020) to current (April 2022) levels. Economic perceptions of Canada overall have varied slightly over the course of the pandemic.

Tracking Current Economic Situation (‘Good’ Ratings)



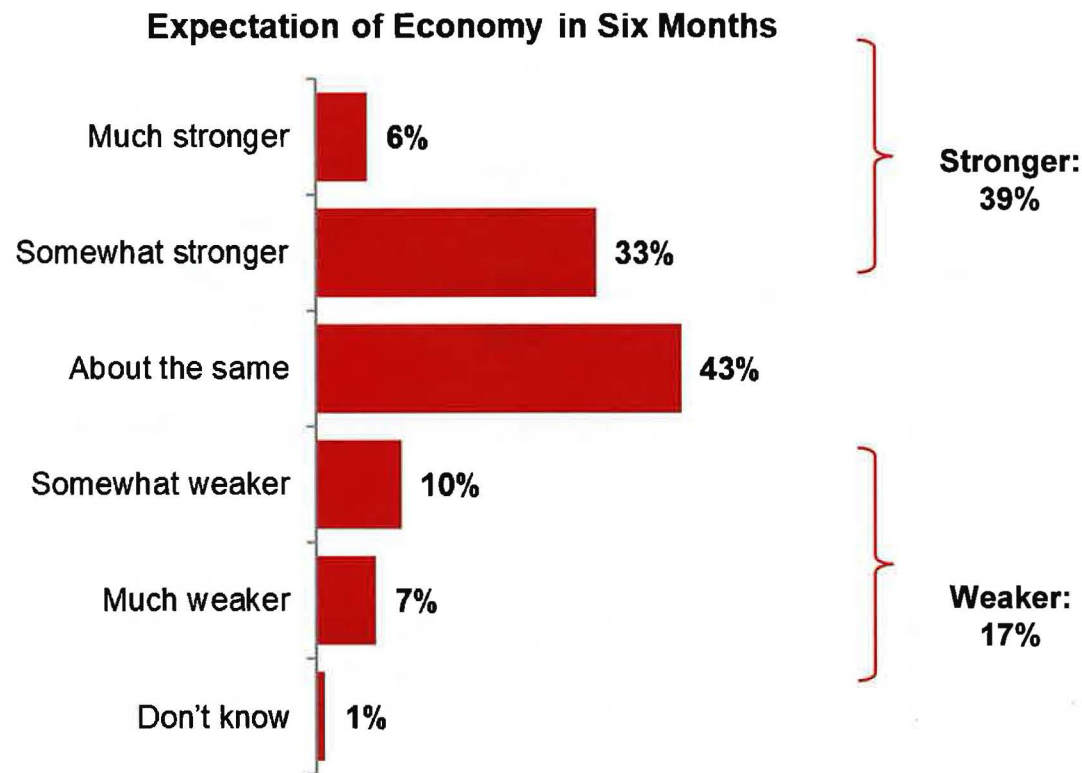
Q6. How would you describe the current economic situation in...?
 Base: all respondents

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



Future of the Economy in Calgary

Approximately two-in-five Calgarians (39%) have a positive outlook of Calgary’s economy in six months while just under one-in-five (17%) expect it to be weaker. About one-half (49%) of all households with children expect the economy to become stronger in the next six months (vs. 35% of households with no children). There is a notably higher incidence of respondents who think the economy will weaken among those under the age of 65 (18% vs ages 65+: 10%) and employed respondents (19% vs 9% of retirees).



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?

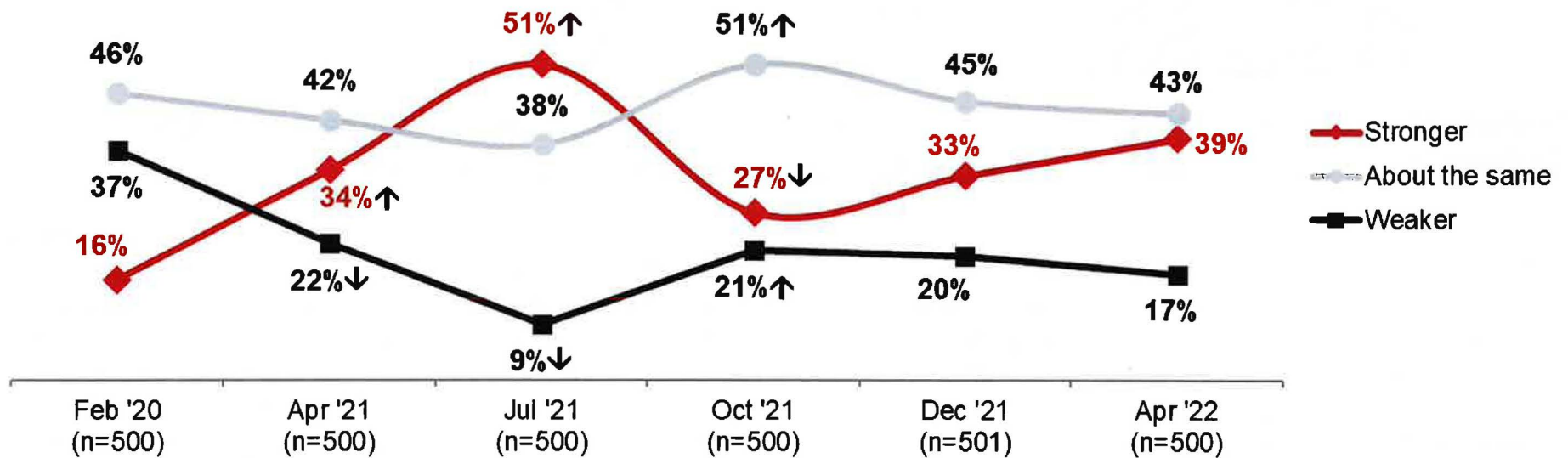
Base: all respondents (n=500)



Tracking Future of the Economy in Calgary

Looking ahead to six months from now, 39% of Calgarians expect Calgary's economy to be stronger. This marks an improvement in perceptions from the last wave (33% in December 2021) as well as pre-pandemic levels (16%). The proportion of those who expect the economy to be about the same (43%) is on par with December 2021 (45%). Similarly, the proportion of those who think the economy will be weaker in six months (17%) is on par with December 2021 (20%) but sees a significant drop from pre-pandemic levels (37%).

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 wave
 ↓ Statistically lower than a previous wave

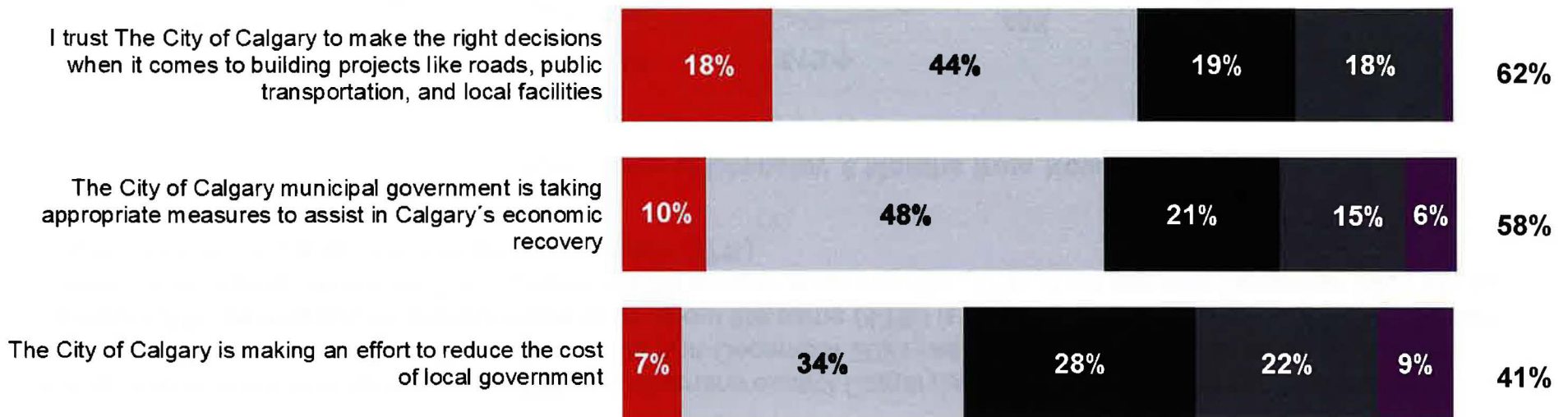
Perceptions of The City's Role in the Economic Recovery and Investments

Most Calgarians (62%) feel that The City will make the right decisions in terms of building projects (roads, public transportation, local facilities). Those who have lived in Calgary for less than 20 years are much more inclined to agree (less than 10 years: 79%; 10-20 years: 70%) than those who have lived in Calgary for over 20 years (53%). Many Calgarians (58%) believe that The City's municipal government is taking the appropriate measures to assist in Calgary's economic recovery. Residents who have lived in Calgary less than 10 years (72%) and 10 to 20 years (65%) are more likely to agree with this statement than those who have lived in Calgary 20+ years (51% agree). In terms of the City making an effort to reduce the cost of local government, more Calgarians disagree (50%) with this statement than agree (41%) that this is being addressed.

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)

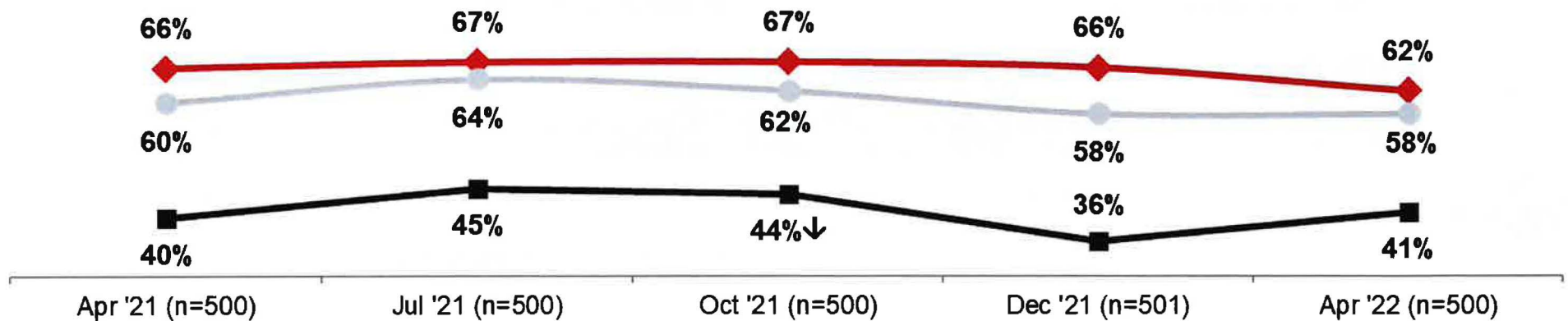
Note: 3% and lower not labelled



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

The proportion of Calgarians who “trust the City of Calgary to make the right decisions when it comes to building projects like roads, public transportation and local facilities” (62%) as well the proportion who agree that “the City of Calgary municipal government is taking appropriate measures to assist in Calgary’s economic recovery” (58%) have remained stable since December 2021. While agreement that “the City of Calgary is making an effort to reduce the cost of local government” (41%) has not significantly increased from the decline recorded in December 2021, it is relatively stable compared to October and July 2021.

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



- ◆ I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities*
- The City of Calgary municipal government is taking appropriate measures to assist in Calgary’s economic recovery*
- The City of Calgary is making an effort to reduce the cost of local government*

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

Base: all respondents

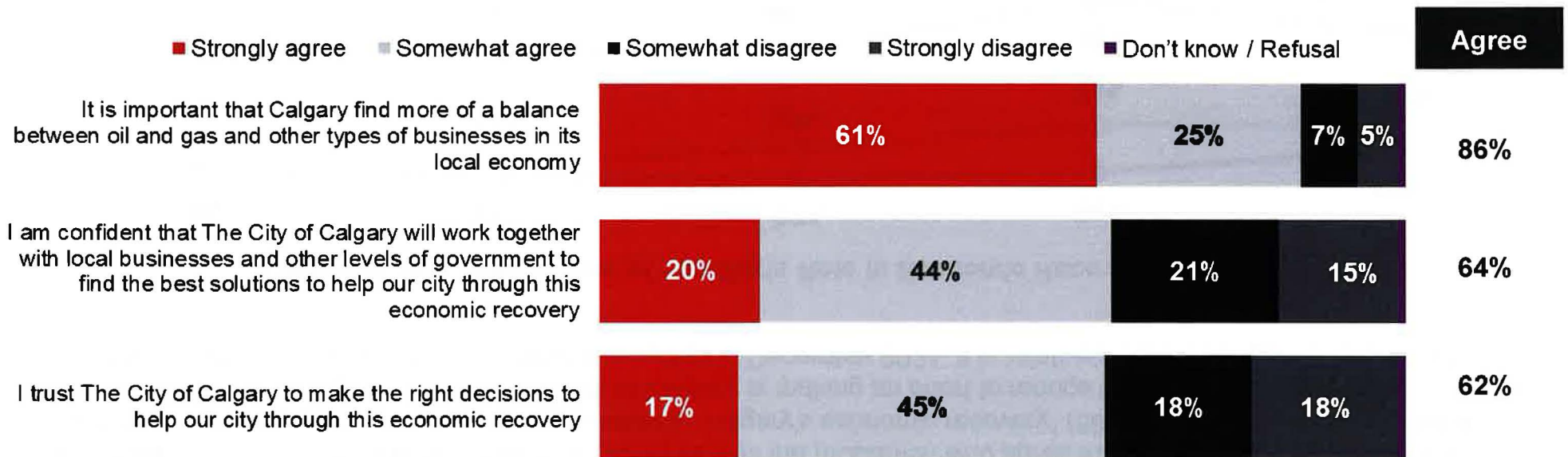
*New statements added in April 2021

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

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

Most (86%) Calgarians agree that it is “important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy.” While almost two-thirds (64%) feel that The City will “work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery” a similar proportion (62%) trust The City to “make the right decisions to help our city through this economic recovery.” Renters have a significantly more optimistic outlook for all measures overall (92%, 74%, 75%, respectively) compared to those who own their residence (85%, 60%, 58%).

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.

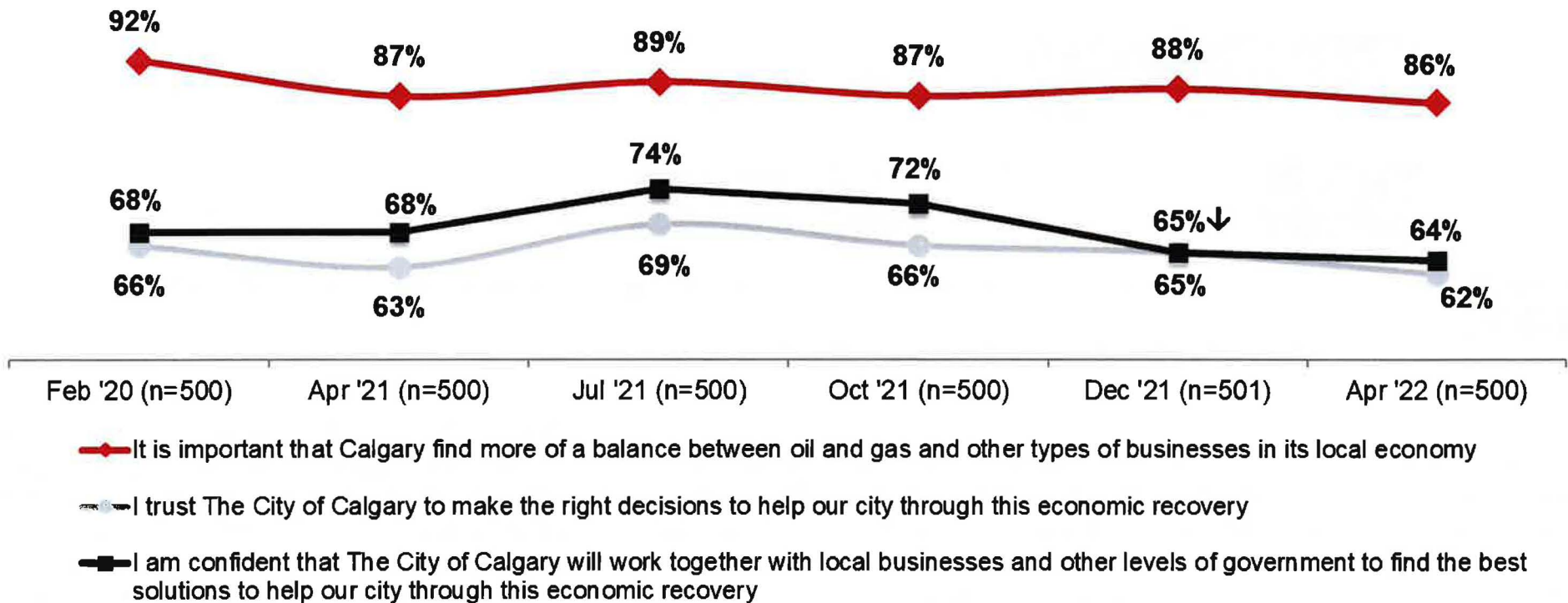
Base: all respondents (n=500)

Note: 3% and lower not labelled

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

Compared to December 2021, perceptions of The City's role in economic recovery and working with local businesses and other levels of government has remained relatively steady.

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



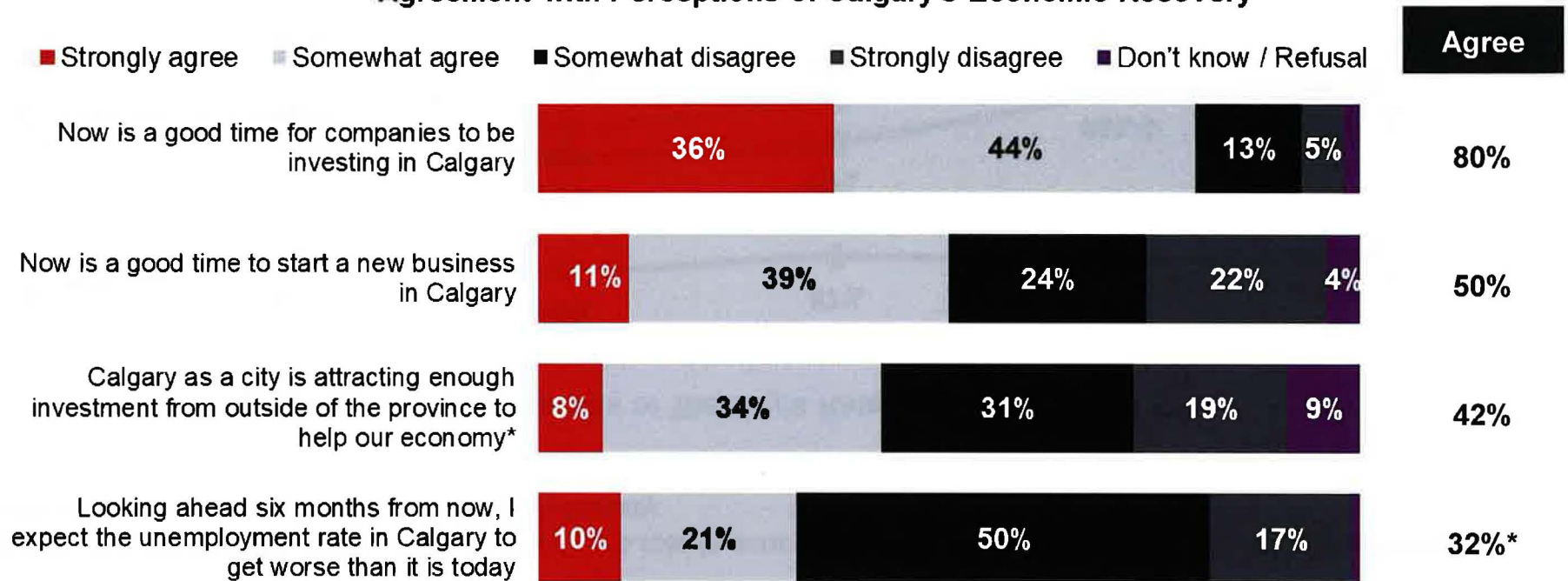
Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.
Base: all respondents

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

Perceptions of Calgary's Economic Recovery and Investments

The majority of Calgarians (80%) believe that now is a good time for companies to be investing in Calgary. Notably less believe now is a good time to start a new business in Calgary (50%), and that Calgary is attracting enough out-of-province investment to help the economy (42%). Two-thirds (67%) do not believe that the unemployment rate will worsen in 6 months' time. However, those with high school education or less are more inclined to believe that it will get worse (44%) compared to those with a university-level education (26%). Calgarians under the age of 65 are also expecting the unemployment rate to worsen (33% vs. 23% among ages 65+), as well as households with children (40% vs 28% with no children in the household) and employed Calgarians (34% vs. 23% of retirees).

Agreement with Perceptions of Calgary's Economic Recovery



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

Base: all respondents (n=500)

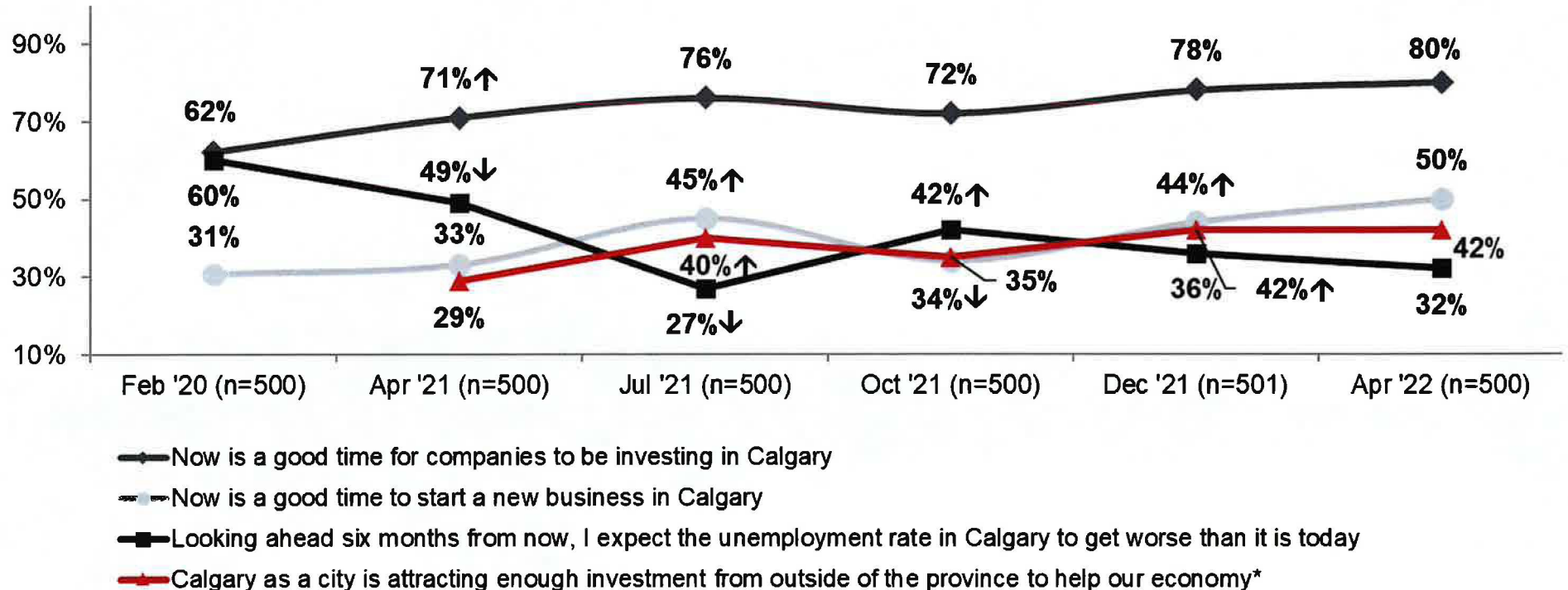
* Indicates rounding

Note: 3% and lower not labelled

Tracking Perceptions of Calgary's Economic Recovery and Investments

Results are consistent for all four statements of perceptions on recovery and investments in Calgary's economy from the last wave. Looking at results pre-pandemic to present, agreement that now is a good time for companies to invest in Calgary has improved significantly (62% in February 2020 to 80% in April 2022), as well as agreement that now is a good time for new businesses to start up in Calgary (31% in February 2020 up to 50% in April 2022). Compared to pre-pandemic levels, less Calgarians agree that the unemployment rate will worsen in six months (60% in February 2020 improving to 32% in April 2022).

Agreement with Perceptions of Calgary's Economic Recovery

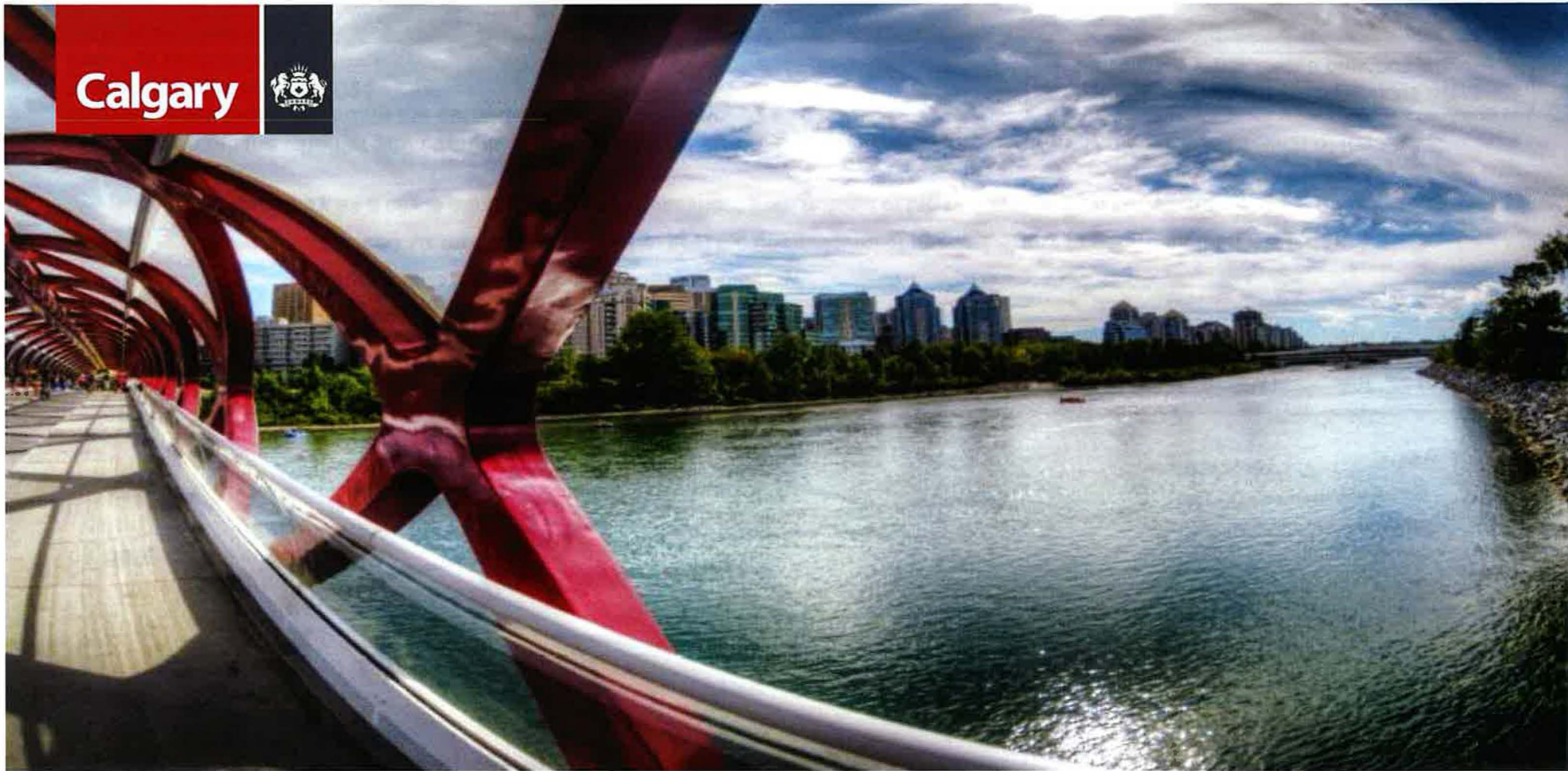


Q9B. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements regarding the current economic recovery.

*Statement new in April 2021

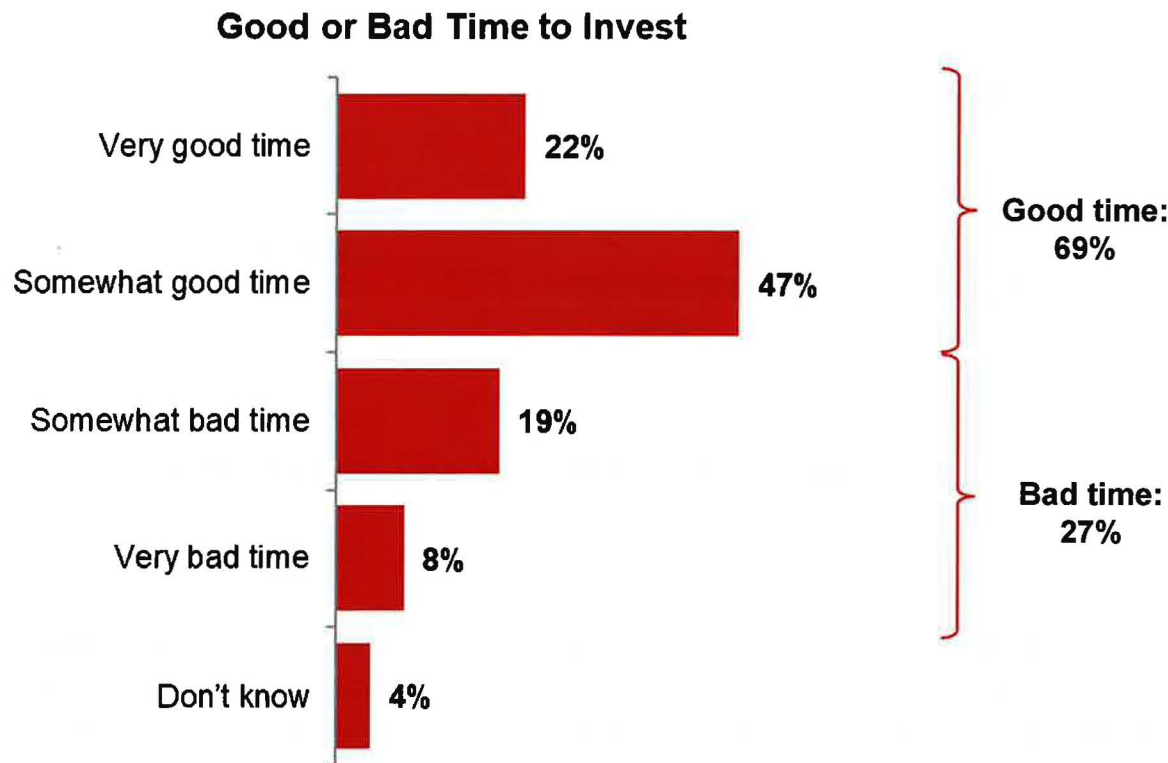
Base: all respondents

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



Infrastructure Investment

Most (69%) residents believe it is a good time for The City to invest in new infrastructure projects, such as roads, public transportation and local facilities. Residents with a university-level education are more inclined to think it's a good time (78%) than those who completed high-school or less (53%) or those who completed some post secondary / completed college (64%). High income households (\$120,000+) also believe it is a good time to invest in infrastructure (76%) compared to households with income \$60,000- \$120,000 (63%).



Q11. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities? I am referring to the Calgary municipal government, including Council and Administration.

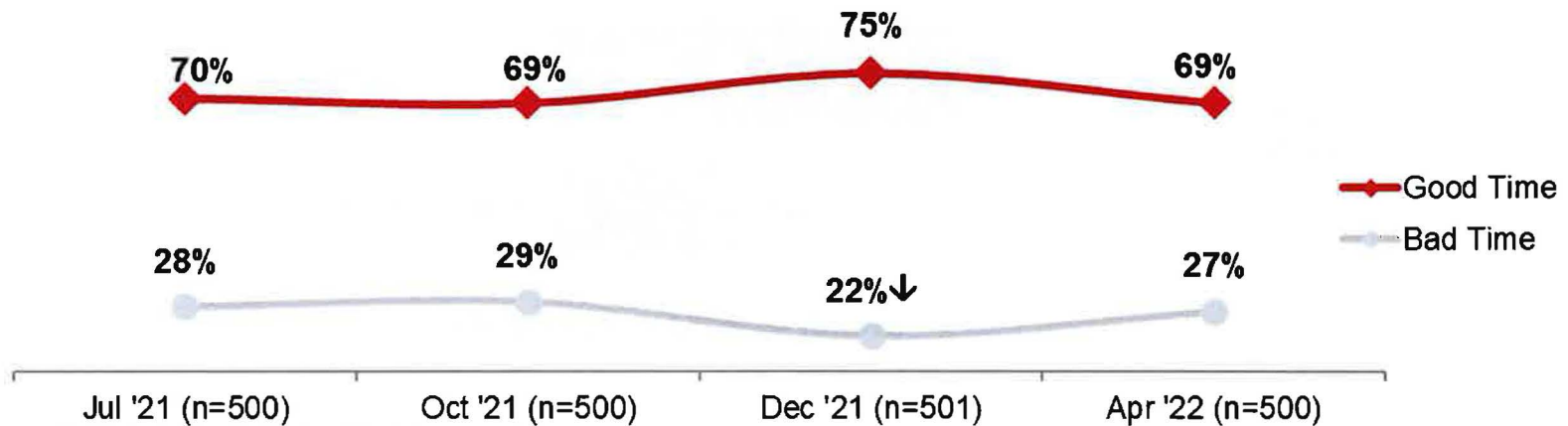
Base: all respondents (n=500)



Tracking Infrastructure Investment

Compared to the last wave in December 2021, the incidence of those who believe that it is a “good time” for The City of Calgary to invest in infrastructure has remained consistent in April 2022. Reflecting on the past few waves, results have trended relatively flat for both perceptions of it being a “good time” and “bad time” to invest, despite a decrease in results for “bad time” in December 2021.

Good or Bad Time for Infrastructure Investment



Q11. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities? I am referring to the Calgary municipal government, including Council and Administration.

Base: all respondents

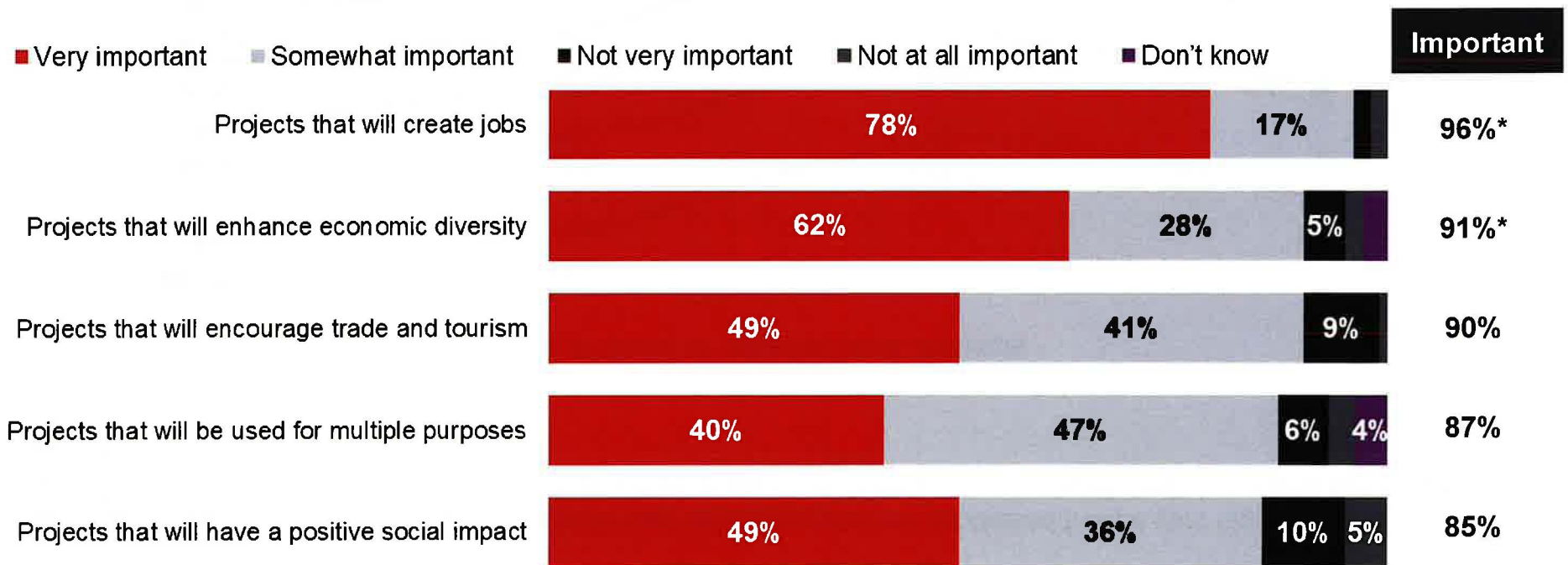
↑ Statistically higher than a previous wave
 ↓ Statistically lower than a previous wave



Importance of Different Infrastructure Investments

A large majority of Calgarians (96%) feel that investing in infrastructure projects will help to create jobs. Projects that will enhance economic diversity (91%) and projects that will encourage trade and tourism (90%) are the next highest priorities. Those who rent rate projects that will create jobs (99%) and have a positive social impact (92%) with a greater degree of importance than property owners (94%, 82%, respectively). Female residents rate projects that will have a positive social impact as significantly more important (89%) than male residents (81%). Lower income households (under \$60,000) place greater importance on projects with positive social impact (92%) than high-income households (\$120,000+, 82%).

Importance of Infrastructure Projects



* Indicates rounding

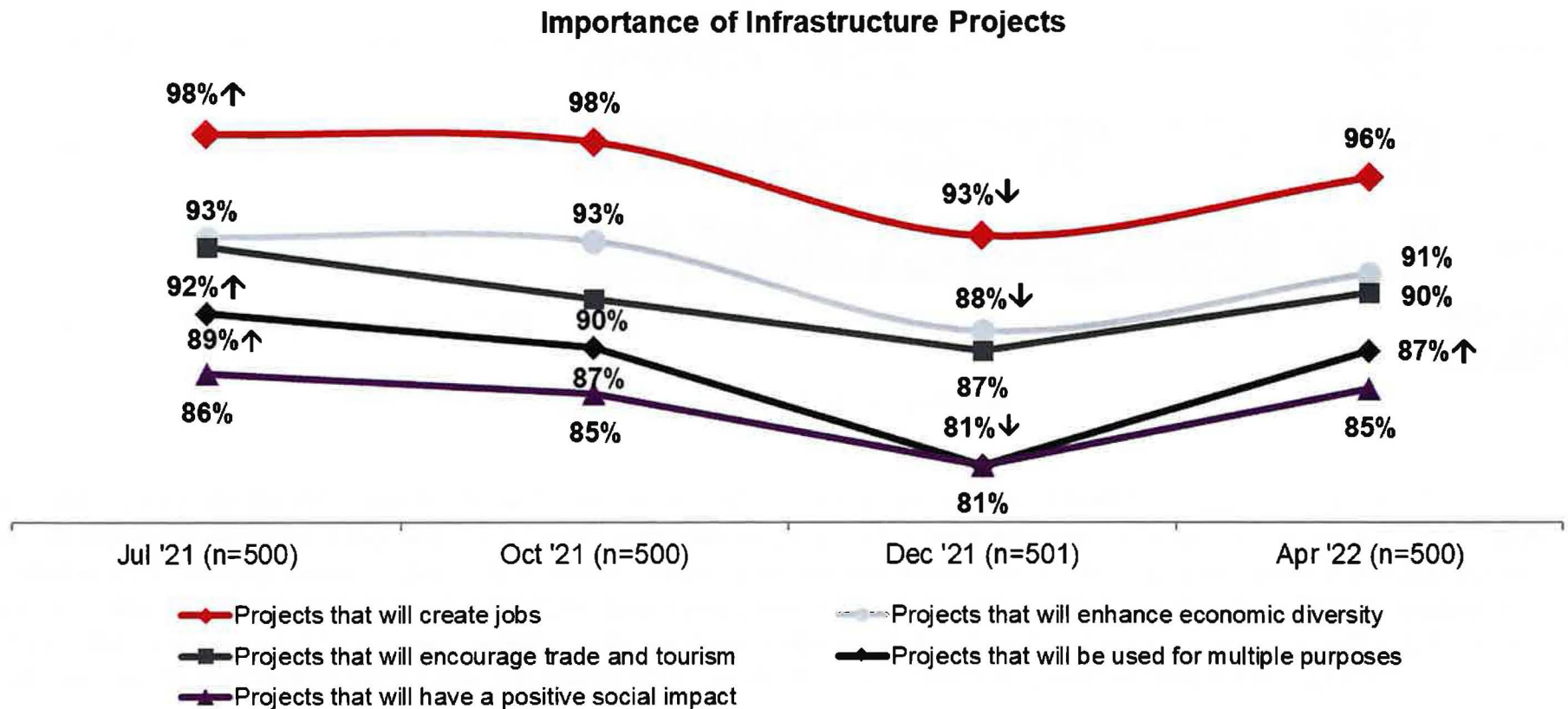
Note: 3% and lower not labelled

Q112. The City of Calgary prioritizes investment in infrastructure projects on an ongoing basis. Please indicate the level of importance you would place on the following types of projects.

Base: all respondents (n=500)

Tracking Importance of Different Infrastructure Investments

After a decline in December 2021, interest in projects that will create jobs has increased from a very high rating of 93% to an even higher level of importance (96%). Projects that will be used for multiple purposes significantly increased after a decline in the last wave, back up to 87% (from 81%).



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

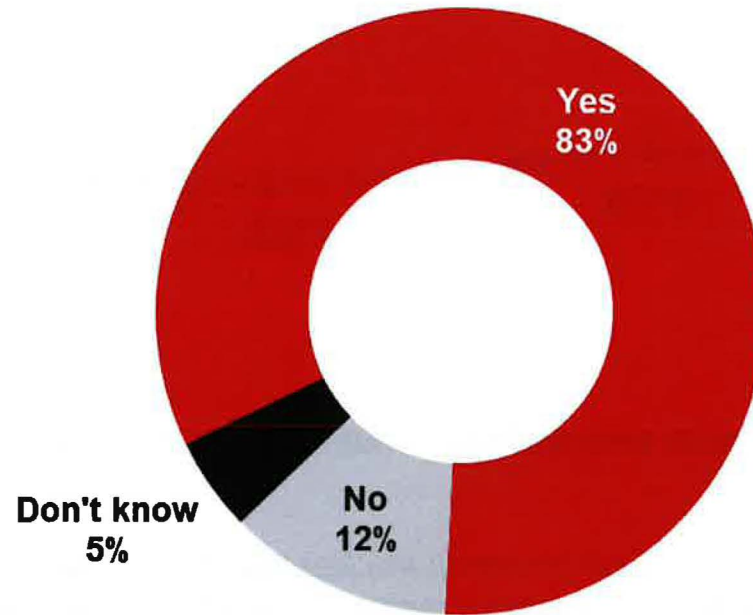
↑ Statistically higher than a previous wave
↓ Statistically lower than a previous wave



Investing Up-front in Infrastructure

Most Calgarians (83%) believe The City should invest more up-front on infrastructure projects if it means reduced maintenance costs and extended timelines for replacement. Approximately one-in-ten (12%) Calgarians do not support this. Those who trust The City support this up-front investment (91%) as well as those who are neutral (85%), significantly more than those who do not trust The City (73%).

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?

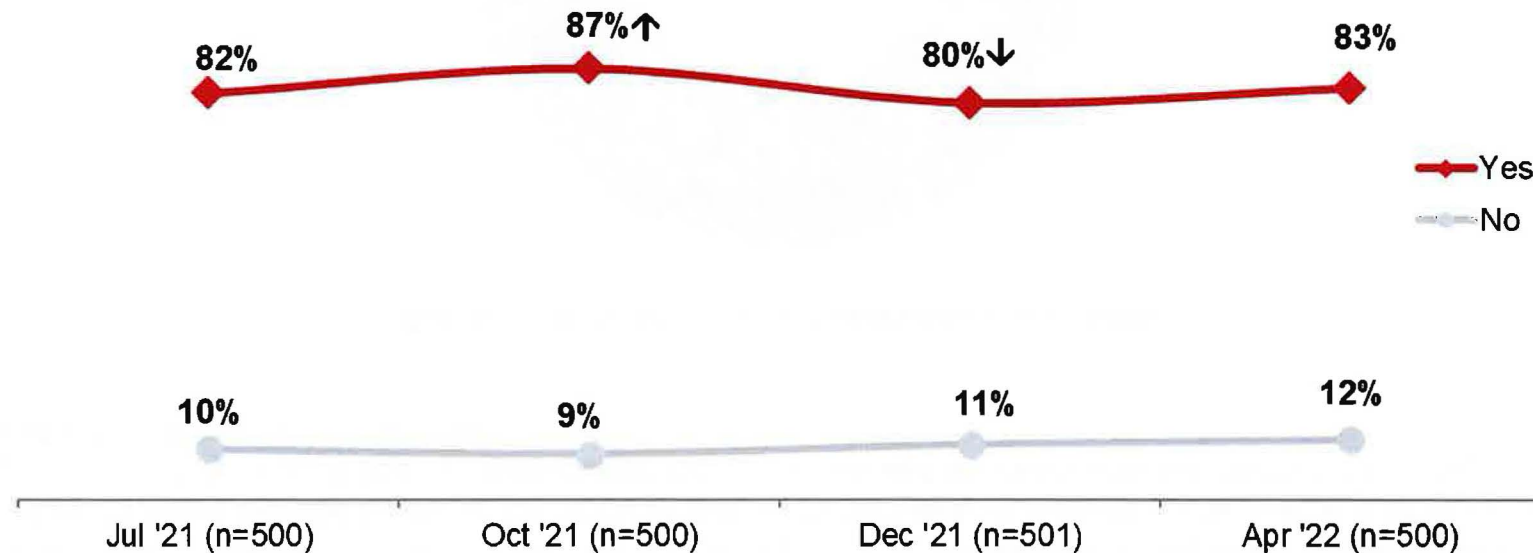
Base: all respondents (n=500)



Tracking Investing Up-front in Infrastructure

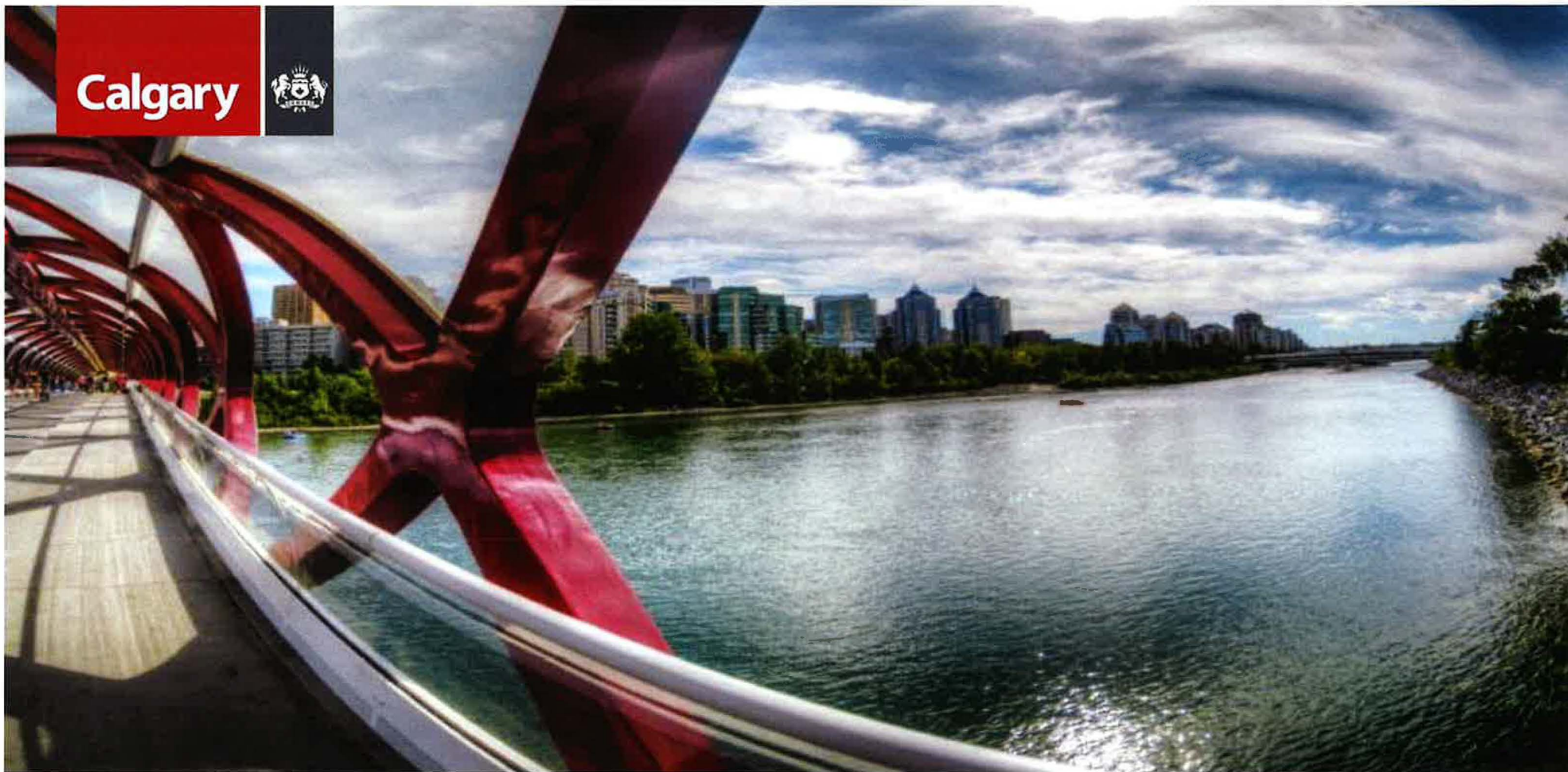
Overall, support for more up-front investment in infrastructure projects to reduce maintenance costs and extend timelines for replacement has trended consistently high over time, despite some fluctuations in recent waves. Those opposed to the idea of up-front investment continue to remain at a relatively low incidence of approximately one-in-ten Calgarians.

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

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

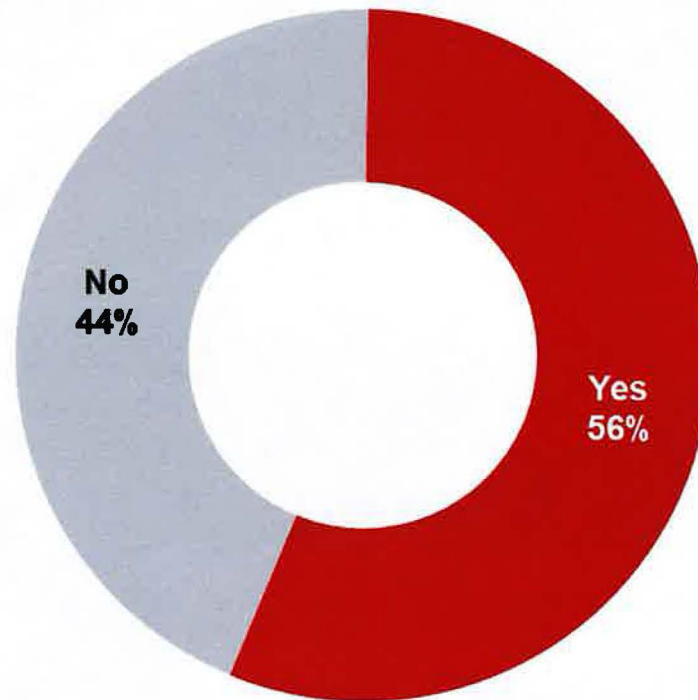


Taxes and User Fees

Awareness of City Collecting Provincial Property Tax

Approximately three-fifths (56%) are aware that The City collects property tax on behalf of the provincial government. Residents aged 65 years and older are significantly more aware of this (71%) compared to those under the age of 65 (53%). Households with a higher income level (\$120,000 or more) are more aware (63% vs. 51% \$60,000-\$120,000 and 48% under \$60,000) as are those who do not identify as racialized (58% vs. 45% racialized).

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



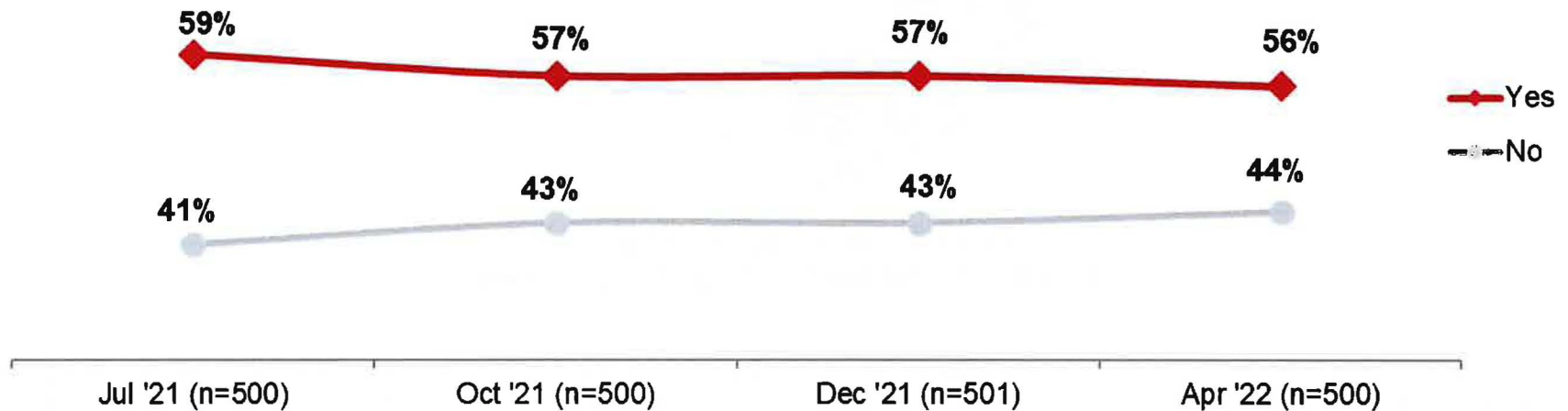
QPT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?

Base: all respondents (n=500)

Tracking Awareness of City Collecting Provincial Property Tax

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

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



QPT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?

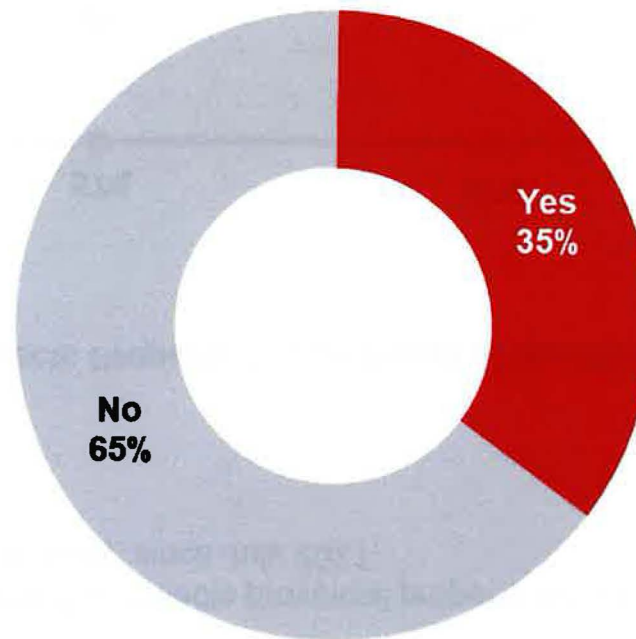
Base: all respondents

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

Awareness of City Tax Allocation to the Province

Approximately one-third (35%) of Calgarians are aware that 40% of taxes collected by The City are transferred to the Province. Similar to last wave, Calgarians ages 65+ are more likely to be aware of this (49% vs 32% of respondents under the age of 65). Among those who own their residence, 38% are aware of this fact (vs 25% renters). Calgarians who have lived in Calgary for 20+ years are also more aware of this (40% vs 27% who have lived in Calgary less than 20 years). Those who do not identify as racialized are also more aware (37% vs. 25% racialized).

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



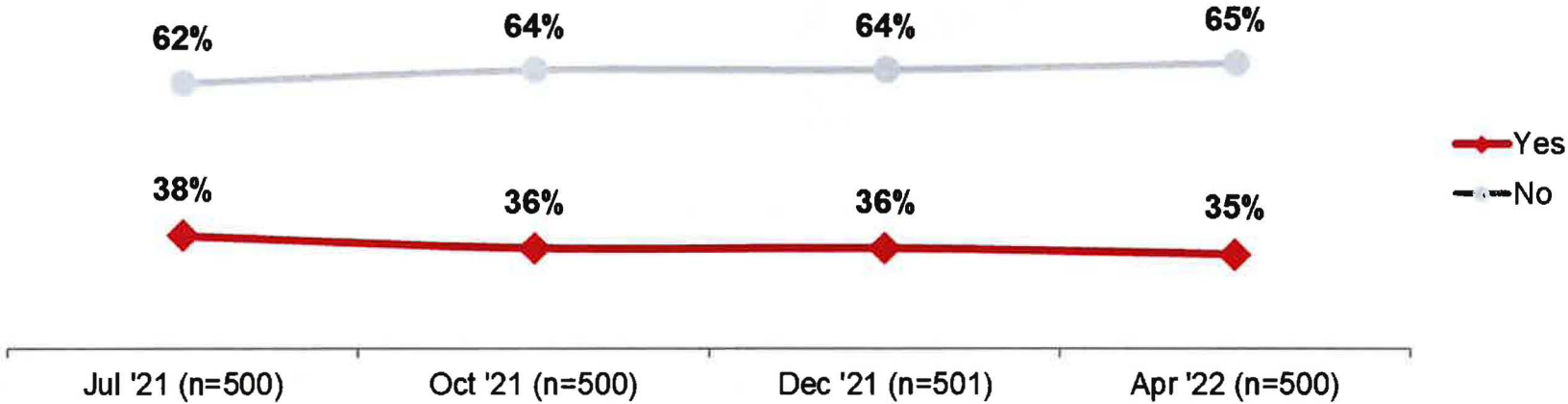
QPT2. Were you aware that approximately 40 per cent of taxes The City collects is transferred to the Province?
 Base: all respondents (n=500)



Tracking Awareness of City Tax Allocation to Province

The proportion of the population aware that 40% of tax collected by The City are transferred to the Province has been consistent over the past four waves of tracking.

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



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

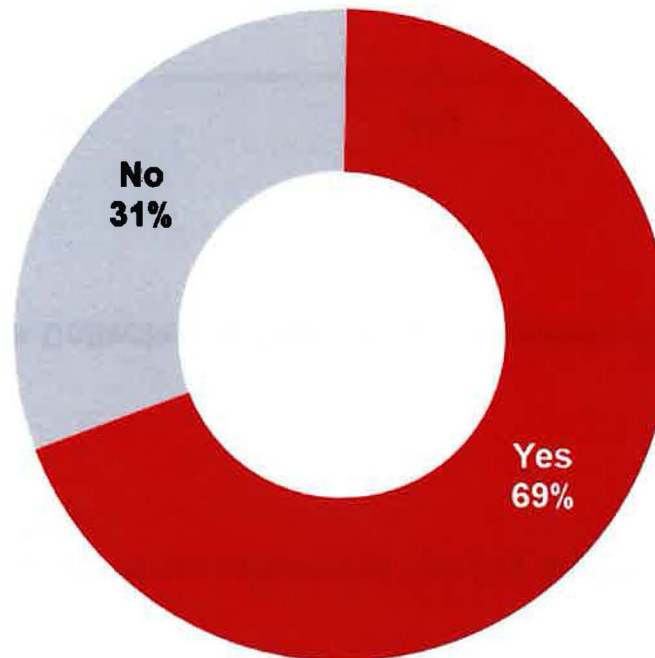
↑ Statistically higher than a previous wave
↓ Statistically lower than a previous wave



Awareness of How City Services are Funded

Most Calgarians (69%) 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. Owners are more aware of this than renters (75% vs 58%), as well as those who have resided in Calgary for over 20 years (76% vs 62% for 10-20 years, 58% for less than 10 years). Households with an income of \$120,000+ are more aware of this (76%) than households with a total income under \$60,000 (58%). Those who do not identify as racialized are also more aware (72% vs. 60% racialized).

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



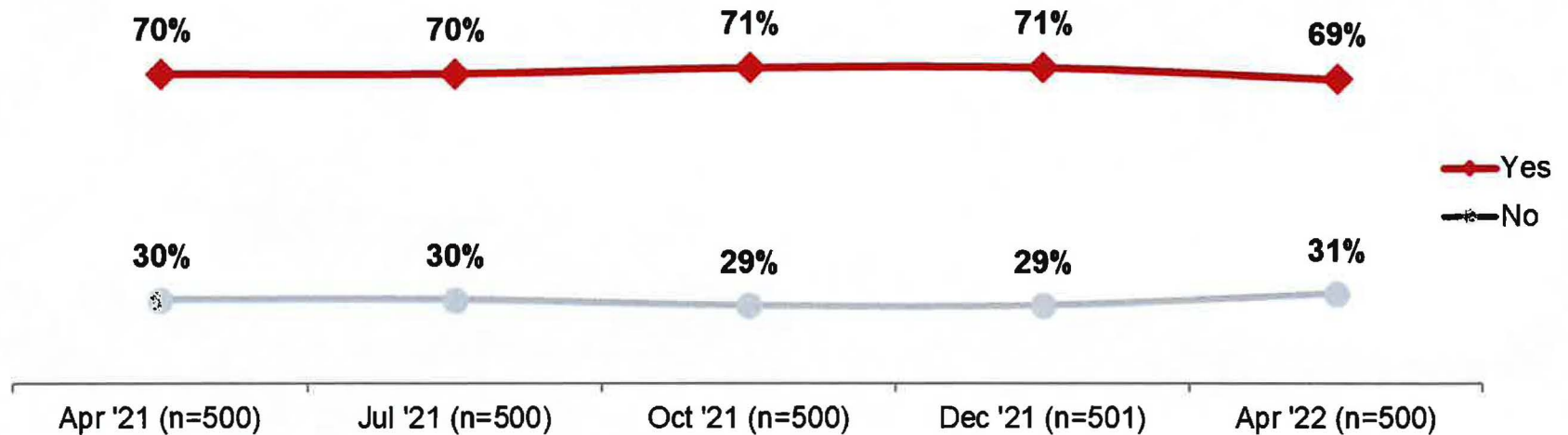
QPT3. Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?

Base: all respondents (n=500)

Tracking Awareness of How City Services are Funded

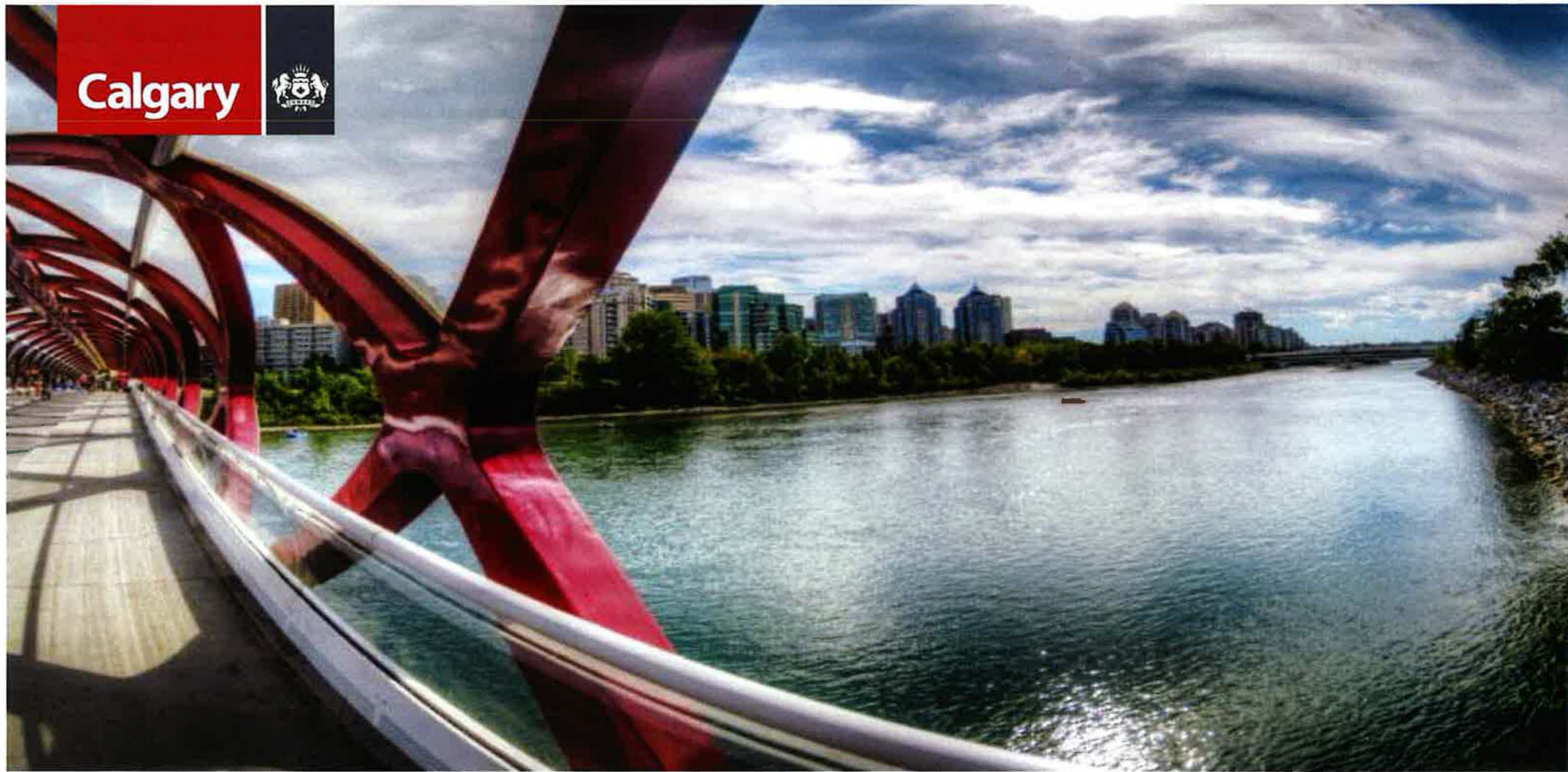
Awareness of how some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees has remained at a consistent level over the past five waves, since July 2021.

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



QPT3. Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?
 Base: all respondents (n=500)

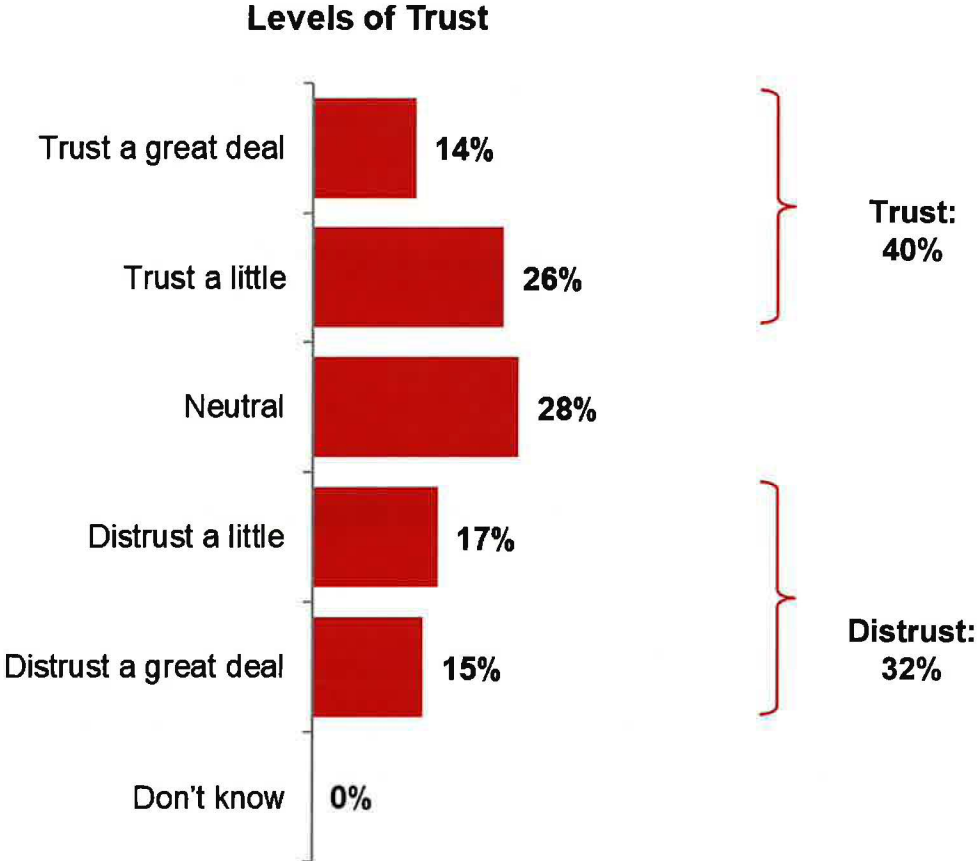
↑ Statistically higher than a previous wave
 ↓ Statistically lower than a previous wave



Trust and Reputation

Levels of Trust in The City

Two-fifths (40%) of Calgarians trust The City of Calgary while 32% distrust The City. Residents ages 65+ have a higher sense of distrust in The City (41% vs. 30% under the age of 65), as do those who have lived in Calgary over 20 years (41% vs 15% for less than 10 years, and 22% for 10-20 years) and property owners (37% vs 22% of renters).



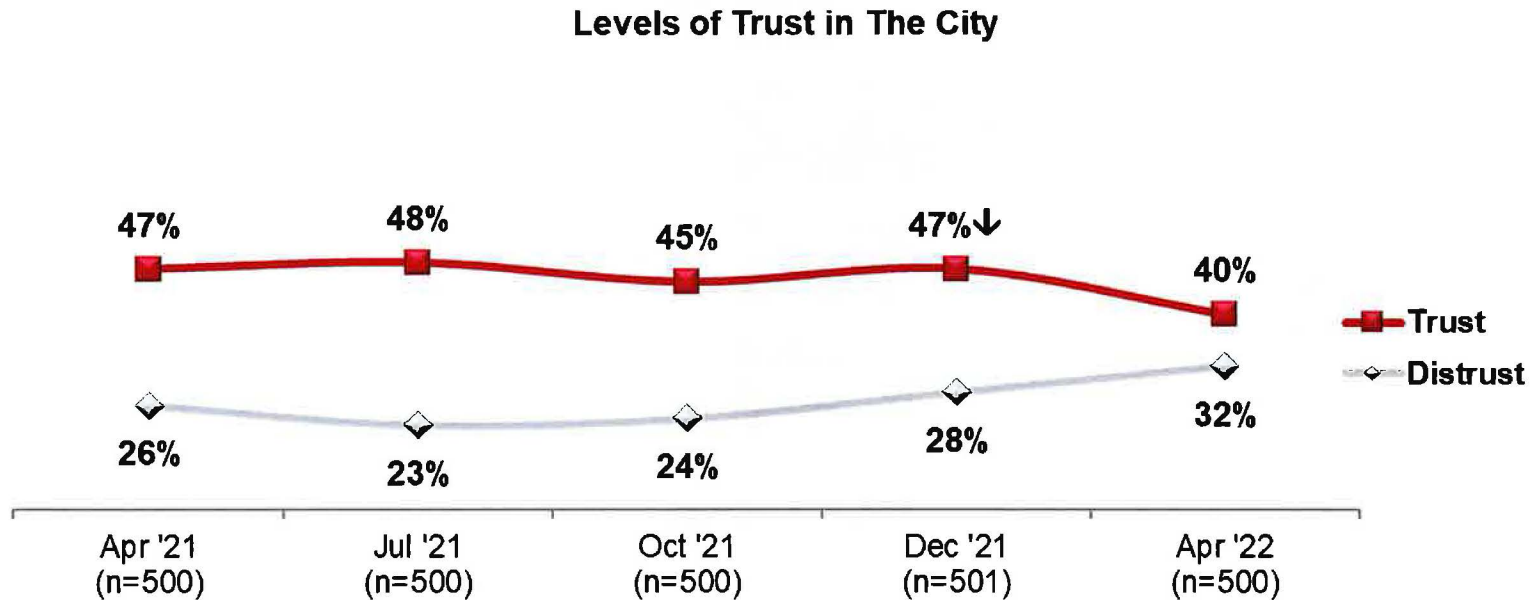
QTR1. Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?

Base: all respondents (n=500)



Tracking Levels of Trust in The City

The level of trust in The City of Calgary has significantly declined, down to 40% in April 2022 from 47% in December 2021. Level of distrust in The City has not significantly changed since the previous wave, however, in comparison July 2021 distrust has significantly increased from 23% to 32% in April 2022.



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

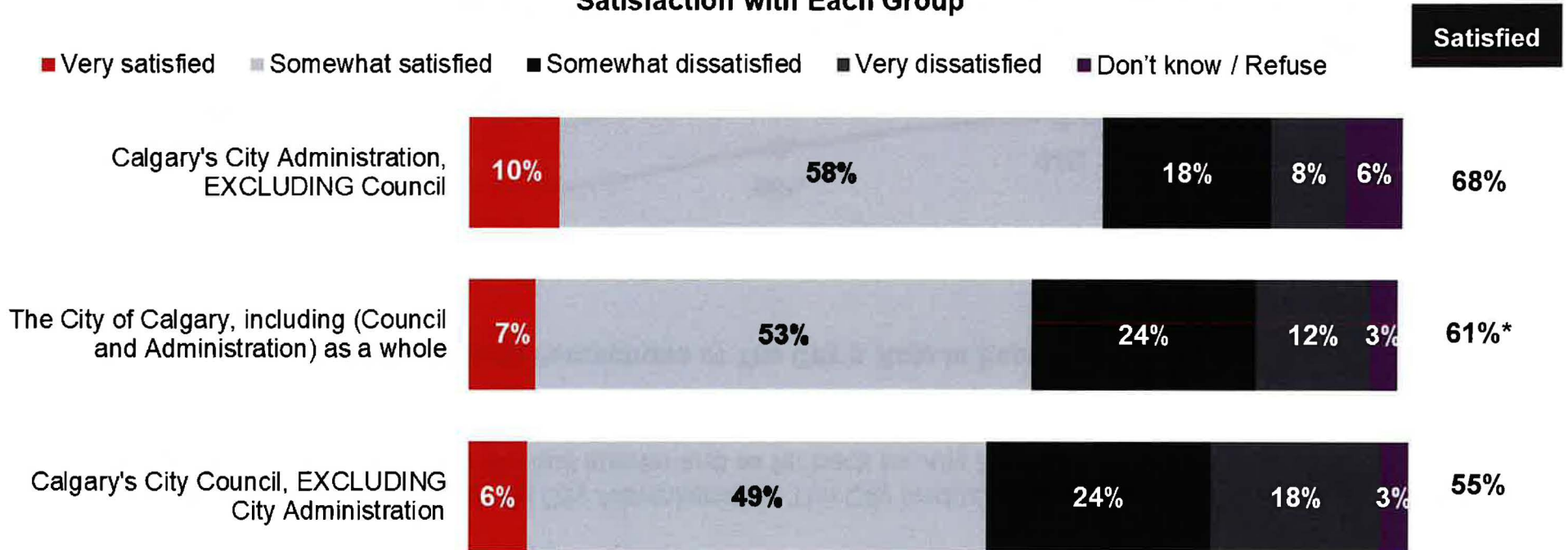
↑ Statistically higher than a previous wave
 ↓ Statistically lower than a previous wave



Satisfaction with The City

Two-thirds (68%) are satisfied with how City Administration (excluding Council) is going about running Calgary this past wave, followed by satisfaction with The City as a whole (61%), and City Council excluding Administration (55%). Calgarians under age 65 are more satisfied with City Council (57%) than Calgarians ages 65+ (43%) as well as employed residents (55% vs. 43% retirees). Renters are also more satisfied with The City (70% vs 57% owners) and City Council (64% vs 52% owners). Households with an income of less than \$60,000 are more satisfied with The City (71% vs. 64% for \$120,000 or more) and City Council (63% vs 59% for \$120,000 or more). Those who identify as a racialized are also significantly more satisfied with The City as a whole (71% vs 58% non-racialized).

Satisfaction with Each Group



QTR2. Taking everything into account, how satisfied or dissatisfied are you with the way the following groups are going about running our city?

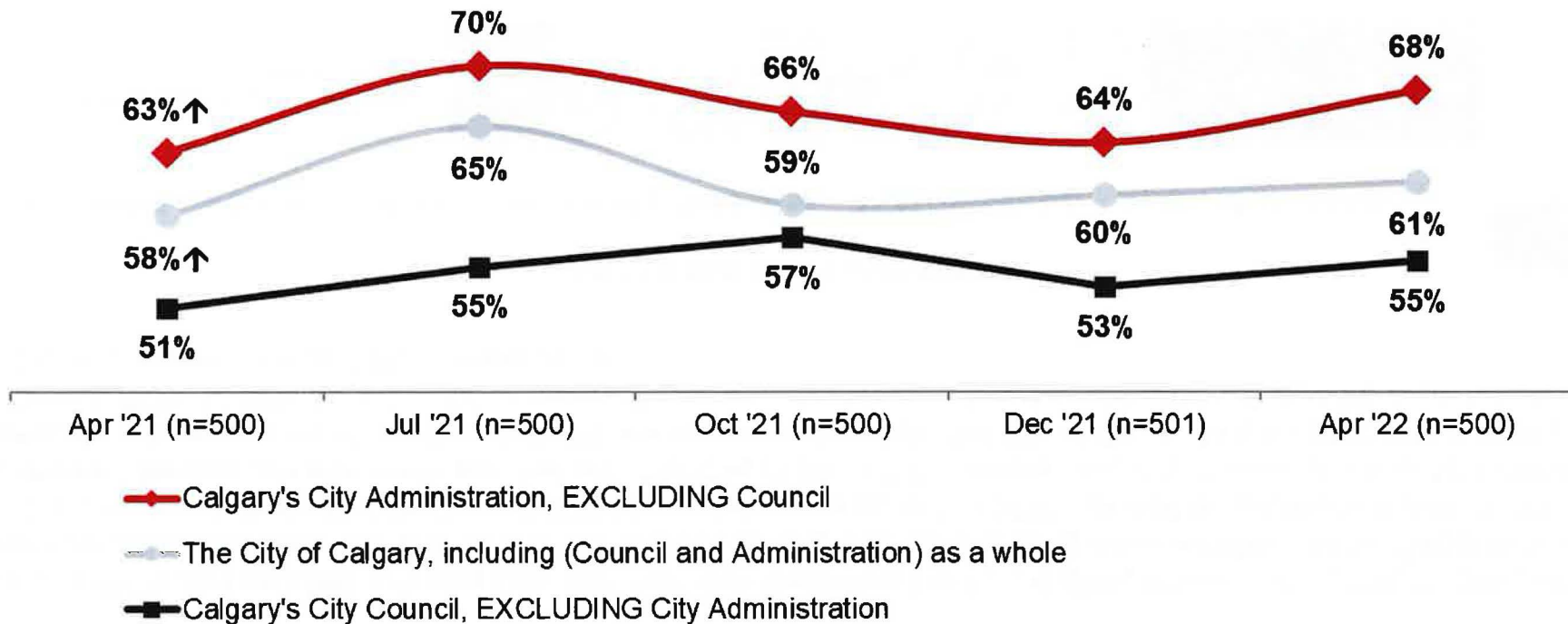
Base: all respondents (n=500)



Tracking Satisfaction with The City

Satisfaction with the running of Calgary by City Administration, The City (including Council and Administration), and City Council has remained consistent over the last quarter and as far back as July 2021.

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



QTR2. Taking everything into account, how satisfied or dissatisfied are you with the way the following groups are going about running our city?

Base: all respondents (n=500)

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

Demographics



Demographics

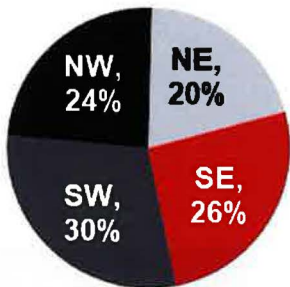
GENDER

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

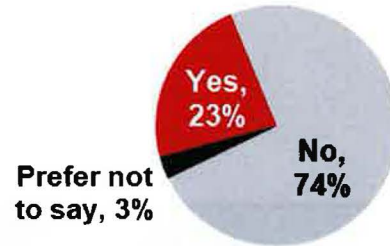
AGE

18 to 24 years	11%
25 to 34 years	22%
35 to 44 years	18%
45 to 54 years	20%
55 to 64 years	14%
65 years +	16%

QUADRANT



RACIALIZED



PEOPLE IN HOUSEHOLD

1	17%
2	30%
3	20%
4 or more	30%
Refuse	2%

CHILDREN IN HOUSEHOLD

Yes	38%
No	62%

SENIOR IN HOUSEHOLD

Yes	21%
No	79%

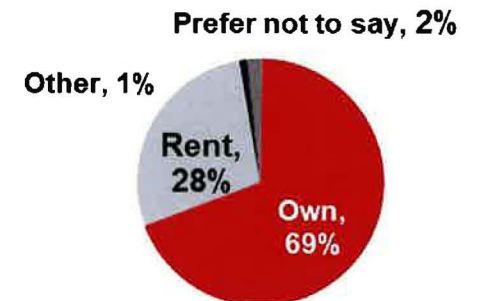
TYPE OF RESIDENCE

Single detached house	10%
Duplex, triplex or...	10%
Townhouse or...	11%
Apartment or...	15%
Another type of...	1%

RESPONSIBLE FOR PROPERTY TAX/RENT

Yes	87%
No	13%

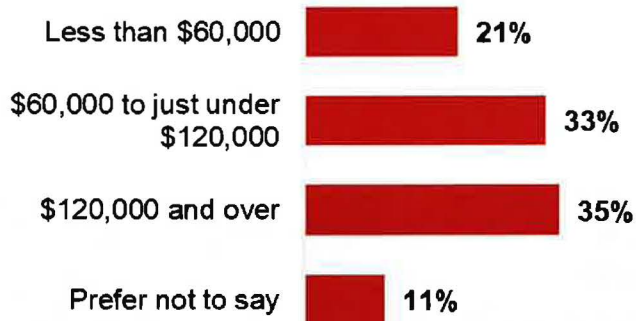
RESIDENCE



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

Demographics

ANNUAL HOUSEHOLD INCOME



IDENTIFY LGBTQ2S+

Yes	13%
No	85%
Prefer not to say	1%

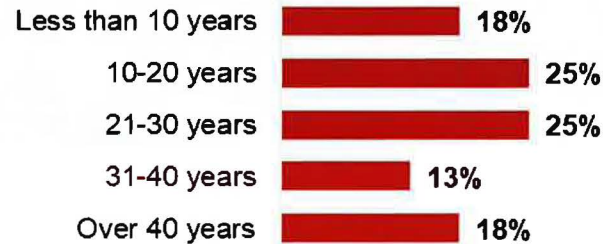
BUSINESS OWNER

Yes	22%
No	78%

EDUCATION

Completed High School or Less	19%
Some Post-Secondary or Completed a College Diploma	27%
Completed University Degree or Post-Graduate Degree	54%

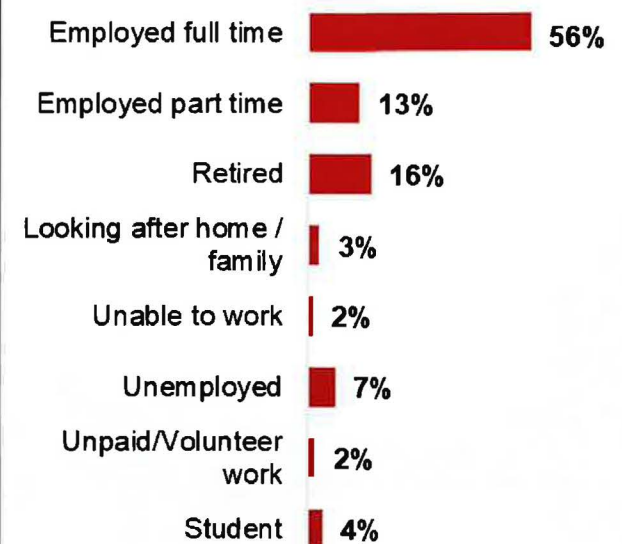
TENURE IN CALGARY



DISABILITY IN HOUSEHOLD

Yes - myself	8%
Yes - someone in my household	10%
No	83%

EMPLOYMENT STATUS



IDENTIFY AS INDIGENOUS

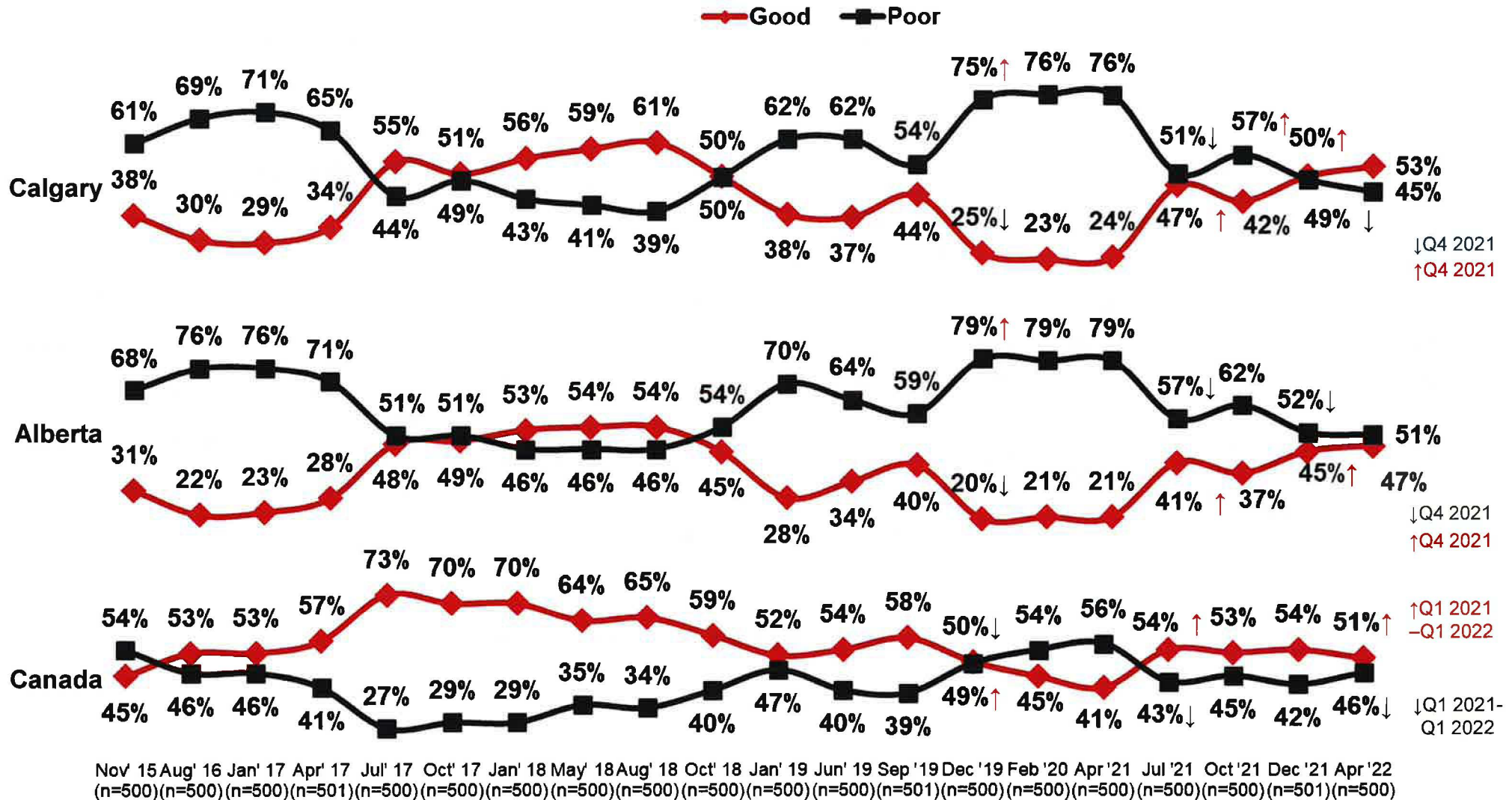
Yes - First Nations	1%
Yes - Métis	2%
Yes - Inuit	0%
No	97%

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

Appendix A: Tracking



Tracking Current Economic Situation

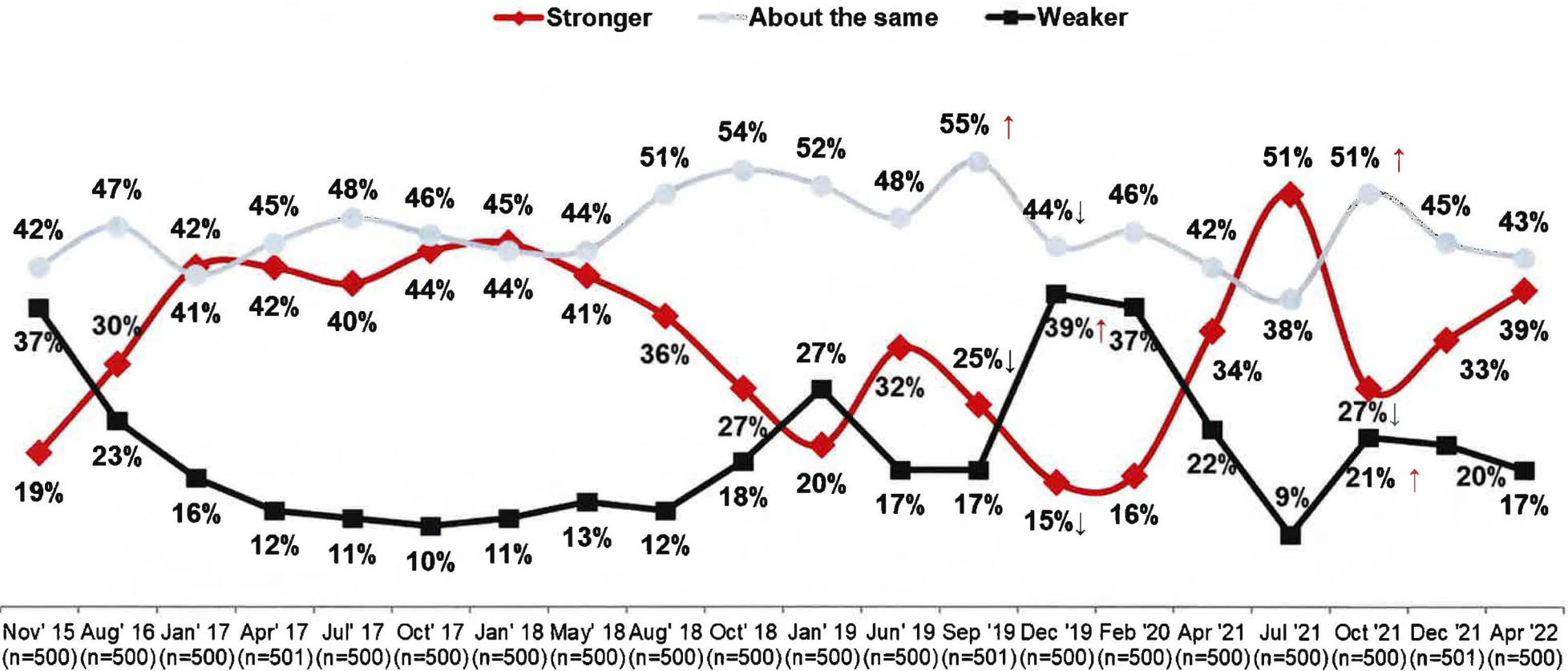


Q6. How would you describe the current economic situation in...?

Base: all respondents (n=500-501)

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

Tracking Future Economy in Calgary



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

Base: all respondents (n=500-501)

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



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

	% 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	Dec 2021	Apr 2022
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%	88%	86%
I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery	78%	74%	78%	79%	76%	74%	73%	70%	67%	67%	63%	66%	68%	68%	74%	72%	65%↓	64%
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%	65%	62%
I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities	Added in Apr 2021												66%	67%	67%	66%	62%	
The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery	Added in Apr 2021												60%	64%	62%	58%	58%	
The City of Calgary is making an effort to reduce the cost of local government	Added in Apr 2021												40%	45%	44%	36%↓	41%	

Q9. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery. I am referring to the Calgary municipal government, including Council and Administration.

Base: all respondents (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, Dec '21 n=501, Apr '22 n=500)

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

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	Dec 2021	Apr 2022
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%	78%	80%
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%↑	36%	32%
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%↓	44%↑	50%
Calgary as a city is attracting enough investment from outside of the province to help our economy	Added in Apr 2021													29%	40%↑	35%	42%↑	42%

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

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, Dec '21 n=501, Apr '22 n=500)



Appendix B: Questionnaire





The City of Calgary
Economic Perspectives Research: Wave 1 2022
FINAL

INTRO.

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

The survey will take approximately 15 minutes to complete. Please be assured that your responses will remain confidential, and you will not be personally identified. Any personal information collected is under the authority of the Freedom of Information Protection and Privacy Act, Section 33(c), and is used solely for the review and improvement of City of Calgary programs and services. If you have questions about the collection or use of your information, please contact a City of Calgary Research Coordinator at 403-268-0732 and specifically mention the "2022 Economic Perspectives Survey" or send a letter to The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5.

(INTERVIEWER NOTE: IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "2022 Economic Perspectives Survey." City Staff would be happy to address your concerns.)

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

ECONOMIC PERSPECTIVES SURVEY - Wave 1 2022 (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

Q5EX

[PROGRAMMER NOTES: TRACK GENDER QUOTA \$]

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]



QSI

[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

A. PERSPECTIVES OF QUALITY OF LIFE AND THE ECONOMY

1. (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]

2. (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

3. (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

4. 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]

- A. (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
- B. (Q9C) I trust The City of Calgary to make the right decisions to help our city through this economic recovery
- C. (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
- D. (Q9D) It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy
- E. (Q9J) The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery
- F. (Q9K) The City of Calgary is making an effort to reduce the cost of local government

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



ECONOMIC PERSPECTIVES SURVEY – Wave 1 2022 (FINAL)

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

[ITEMS] [ROTATE]

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

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

B. PERSPECTIVES OF TAX & USER FEES

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

In Calgary, property tax dollars are divided between The City and the Alberta provincial government. The City collects provincial property tax on behalf of the provincial government and transfers it to them annually. Approximately 80 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 – Wave 1 2022 (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 front on infrastructure investment if it means reduced long term maintenance and replacement costs?

- Yes
- No
- I don't know



ECONOMIC PERSPECTIVES SURVEY – Wave 1 2022 (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)

ECONOMIC PERSPECTIVES SURVEY – Wave 1 2022 (FINAL)

E. DEMOGRAPHICS

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

QD1. In what year were you born?

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

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

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

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

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

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

[IF AGE AT QS4 = 65+ SKIP NEXT]

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

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

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

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

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

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

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

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



ECONOMIC PERSPECTIVES SURVEY - Wave 1 2022 (FINAL)

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

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

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

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

- 1 Did not complete high school or equivalent
- 2 Completed high school or equivalent
- 3 Completed a Registered Apprenticeship or other trades certificate or diploma
- 4 Completed a college or other non-university certificate or diploma
- 5 Completed a university certificate, diploma or degree
- 99 Don't know / Refusal (DO NOT READ)

QD8. What best describes your current employment status? Please stop me when I get to your category. Would you say you are... (READ LIST; Select up to two responses) (INTERVIEWER: BEST two that describe your status)

- 1 Full time employed or self-employed (IF ASKED, 30 hours or more per week)
- 2 Part time employed or self-employed (IF ASKED, less than 30 hours per week)
- 3 Retired
- 4 Looking after home and/or family
- 5 Unable to work because of sickness or disability
- 6 Unemployed
- 7 Doing unpaid or voluntary work
- 8 Student
- 96 Other (DO NOT READ) (SPECIFY) _____
- 99 Don't know / refuse (DO NOT READ)

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

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

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

[ASK ALL]

QD10. Which of the following categories best describes the total annual income, before taxes, of all the members of your household? Please stop me when I get to your category. (READ LIST - ACCEPT RESPONSE BEFORE FINISHING LIST)

ECONOMIC PERSPECTIVES SURVEY - Wave 1 2022 (FINAL)

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

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

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

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

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

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

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

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

QD11. What is your gender? (IF NECESSARY - DO NOT READ EXCEPT TO CLARIFY: Gender refers to the gender that a person internally feels and/or the gender a person publicly expresses in their daily life, including at work, while shopping, or accessing other services, in their home or in the broader community.)

- (DO NOT READ LIST EXCEPT TO CLARIFY)
- Female
 - Male
 - Prefer to self-describe (specify)
 - Refused/prefer not to say

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

Yes



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

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

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

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

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

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

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

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

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

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

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

Yes – myself
Yes – someone in my household
No

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

Yes
No

QD19. Finally, The City of Calgary regularly engages with citizens about municipal matters. Would you be interested in participating in future City research? Your contact information will be shared with The City

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of Calgary for research purposes only. Names and contact details will never be attached to your responses to this survey.

Yes
No

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

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

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT]

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

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

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

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Calgary



Contact

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