

Calgary



Economic Perspectives Research

Final Report

April 2023

Prepared by:





Acknowledgements

Land Acknowledgement

We acknowledge the traditional territories and oral practices of the Blackfoot Nations, which include the Siksika, the Piikani, and the Kainai. We also acknowledge the Tssut'ina and Stoney Nakoda First Nations, the Métis Nation (Region 3), and all people who make their homes in the Treaty 7 region of Southern Alberta.



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Background and objectives

Background

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

Objectives

The objectives of the survey include:

1. Measuring perceptions of the quality of life in Calgary; the current economic situation in Calgary, Alberta, and Canada; Calgary's economic recovery; and The City's role in economic recovery and encouraging investment.
2. Gauging levels of support for The City investing in infrastructure.
3. Determining awareness levels about The City's role to collect provincial property tax on behalf of the Province; the fact that 35% of taxes collected by The City are transferred to the Province; and how City services are funded.
4. Measuring levels of trust and satisfaction with how well The City (including both Council and Administration) is performing (or, "running" Calgary).

Methodology

The survey was conducted by Advanis from April 4th to April 14th, 2023, with 501 Calgary residents aged 18 and older via a telephone survey. The average time to complete the survey was 16 minutes.

The survey was conducted using numbers from both landlines (25%) and cell phones (75%) to obtain a random and statistically-representative sample of Calgarians.

The margin of error (MOE) for the total sample of n=501 is ± 4.4 percentage points, 19 times out of 20 (though smaller among subgroups of the total).

To ensure the data was gathered from a representative group of Calgarians, sample quotas were set by age, gender, and city quadrant.

Data were weighted based on the latest Municipal census for age, gender, and city quadrant. Although the results are weighted, sample sizes for each question represent the number of actual respondents (i.e., unweighted n).

Throughout the report, ↓ denotes a significant decrease from the previous wave and ↑ denotes a significant increase from the previous wave, unless otherwise specified.

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



Highlights at a glance

QUALITY OF LIFE & ECONOMY



69%
(-10%pt)↓

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



63%
(+5%pt)

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



20%
(-2%pt)

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

ECONOMIC RECOVERY & ROLE OF GOVERNMENT



42%
(-5%pt)

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



51%
(-5%pt)

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



39%
(+3%pt)

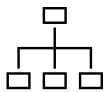
Agree The City is making an effort to reduce the cost of local government

TRUST & SATISFACTION WITH THE CITY



44%
(-3%pt)

Say they trust The City



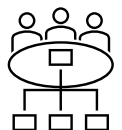
62%
(-6%pt)

Satisfied with the performance of Calgary’s City Administration EXCLUDING Council



50%
(-7%pt)↓

Satisfied with the performance of Calgary’s City Council EXCLUDING City Administration



56%
(-5%pt)

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

TAXES AND USER FEES



49%
(-3%pt)

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



33%
(-1%pt)

Are aware thirty-five per cent of taxes collected by The City are **transferred to the Province**

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



Survey context: April 2023

September 7: Bank of Canada increases policy interest rate by 75 basis points (target at 3.25%).

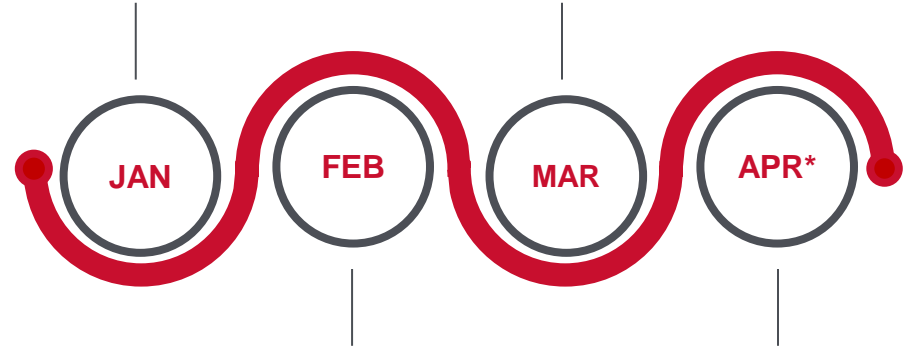
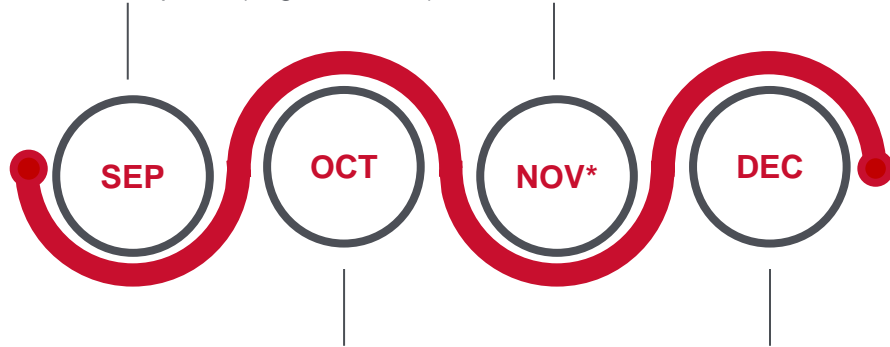
November 22: Premier Danielle Smith announces financial relief measures for Albertans during televised address to help with inflation and affordability.

January 18: PrairiesCan announces a federal investment of \$25.5 million in Calgary through the Jobs and Growth Fund.

January 25: Bank of Canada increases policy interest rate by 25 basis points (target at 4.5%).

March 7: Terrestrial Energy opens office in Calgary (an \$18 million investment). Leadership cites low cost of operation in the province and skilled labour force in Calgary as reasons.

March 8: Bank of Canada holds policy interest rate steady (target at 4.5%).



CREB reports October housing prices have eased by 4% relative to highs reached in May.

October 11: Danielle Smith (UCP) is sworn in as Alberta's 19th Premier.

October 26: Bank of Canada increases policy interest rate by 50 basis points (target at 3.75%).

December 7: Bank of Canada increases policy interest rate by 50 basis points (target at 4.25%).

December 15: Calgary Investment Fund announces it will provide global tech company Mphasis \$7 million over 4 years to hire over 500 Calgarians.

February 1: Avison Young reports Calgary office vacancy rate is down 2.2%pt compared to Q4 2021 and now sits at 23.8%.

February 16: The City of Calgary, The United Way, and Calgary Homeless Foundation announce partnership to invest \$14.1 million towards affordable housing.

April 11: Alberta, Saskatchewan, and Manitoba sign memorandum of understanding to collaborate on large scale infrastructure projects such as enhancing transportation between the provinces.

April 12: Bank of Canada holds policy interest rate steady for the second time in a row (target at 4.5%).

*** Economic Perspectives Surveys Field Dates:**

- 2022 Wave 4: November 1 to 15
- 2023 Wave 1: April 4 to 14

Key findings

Calgarians' perceptions of their overall quality of life in the city has decreased considerably since November 2022.

- Two-thirds (69%) of Calgarians rate their quality of life in Calgary as “good” (ratings of 7 to 10 on a 10-point scale), down from 79% in November 2022.

Most Calgarians continue to have a positive perception of the current economy in Calgary and just over half expect the economy to stay the same over the next 6 months.

- Nearly two-thirds (63%) of Calgarians describe the current economic situation in Calgary as “somewhat or very good”, and a similar percentage (63%) describe the economic situation in Alberta as “somewhat or very good” (an increase from 55% in November 2022).
- The proportion of those who expect Calgary’s economy to remain the same in the next six months increased from 44% in November 2022 to 54% in April 2023 while the proportion of those who expect the economy to be weaker decreased from 32% to 23%.
- Calgarians’ perceptions of The City’s role in economic recovery have not changed significantly since November 2022, with the importance of Calgary finding more of a balance between oil and gas and other types of businesses in its local economy remaining a priority (88%).
- A majority of Calgarians continue to agree that now is a good time for companies to be investing in Calgary, despite a decrease in agreement from 83% in November 2022 to 76% this wave.

Key findings

The vast majority of Calgarians continue to believe that it is a good time for The City to invest in new infrastructure projects, with projects that will create jobs and enhance economic diversity deemed to be most important.

- Three-quarters (76%) of Calgarians believe it is a good time for The City to invest in new infrastructure projects, which is similar to November 2022 (75%).
- Calgarians feel it is important to invest in infrastructure projects that will create jobs (63%), followed by projects that enhance economic diversity (50%).

Awareness of The City collecting and transferring provincial property tax remains stable.

- The proportion of those who are aware that The City collects provincial property tax on behalf of the Province has been steadily declining from 59% in May 2022 to 49% in April 2023.
- Awareness that 35% of taxes collected by The City are transferred to the Province has remained stable since December 2021 and currently sits at 33%.

Although trust in The City has remained stable, satisfaction with The City, and in particular with City Council, has decreased since November 2022.

- Less than half (44%) of Calgarians trust The City while just under one-third (31%) distrust The City.
- Satisfaction with how City Council is going about running the City decreased from 57% in November 2022 to 50% this wave. Satisfaction with City Administration and The City as a whole decreased as well, but only nominally (not significantly).



Detailed findings

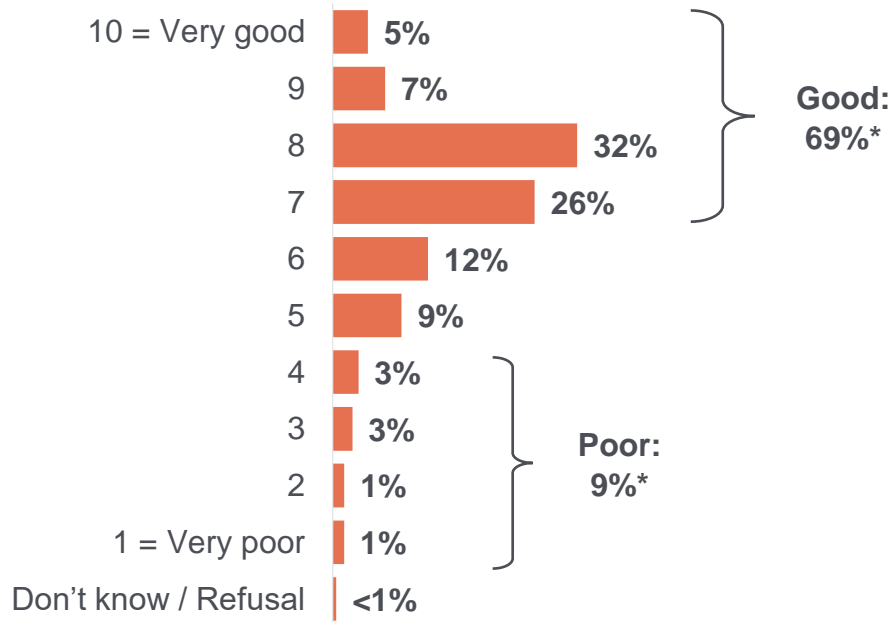
Quality of life



Overall quality of life in Calgary

Two-thirds (69%) of Calgarians rate their quality of life in Calgary as “good” while a minority (9%) disagree, rating it as “poor.”

Rating of quality of life in Calgary



Q2. On a scale of “1” to “10” where “1” represents “very poor” and “10” represents “very good,” how would you rate the overall quality of life in Calgary today?
 Base: all respondents (n=501)

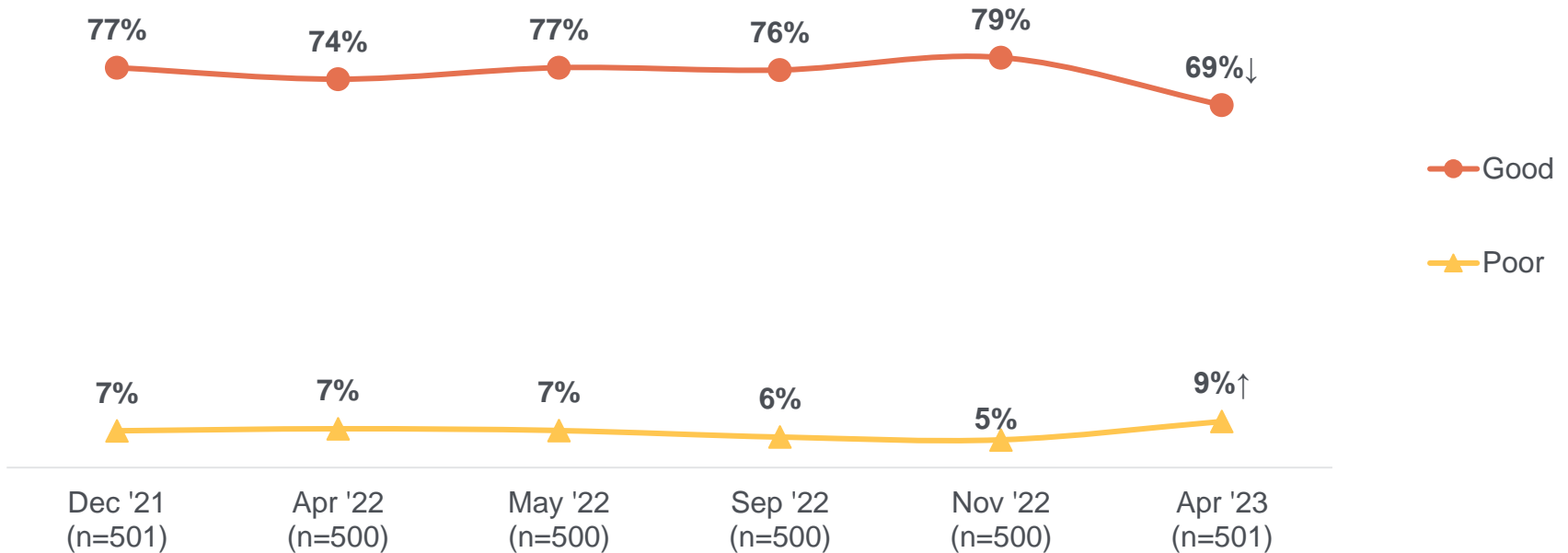
* Rounding



Tracking overall quality of life in Calgary

Calgarians have consistently reported positive quality of life ratings since December 2021, however the number of those rating their quality of life as “good” has decreased significantly since the previous quarter (79% in November 2022 vs. 69% this quarter).

Rating of quality of life in Calgary



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

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



Detailed findings

The economy and economic recovery

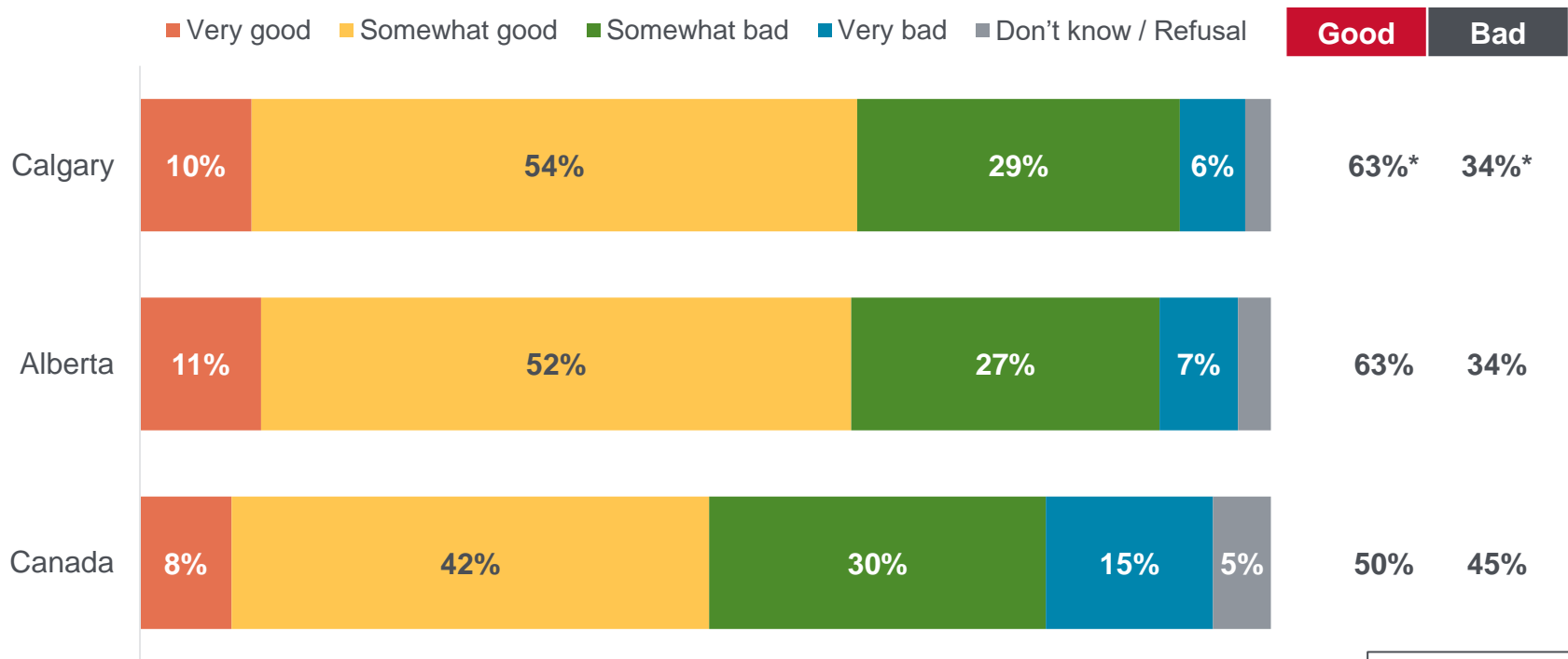


Current economic situation

Nearly two-thirds (63%) of Calgarians describe the current economic situation in Calgary as “good” and the same percentage (63%) describe the economic situation in Alberta as “good”.

- Half (50%) of Calgarians rate the economic situation in Canada as “good”.

Rating current economic situation



* Rounding

Data labels <4% not shown

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

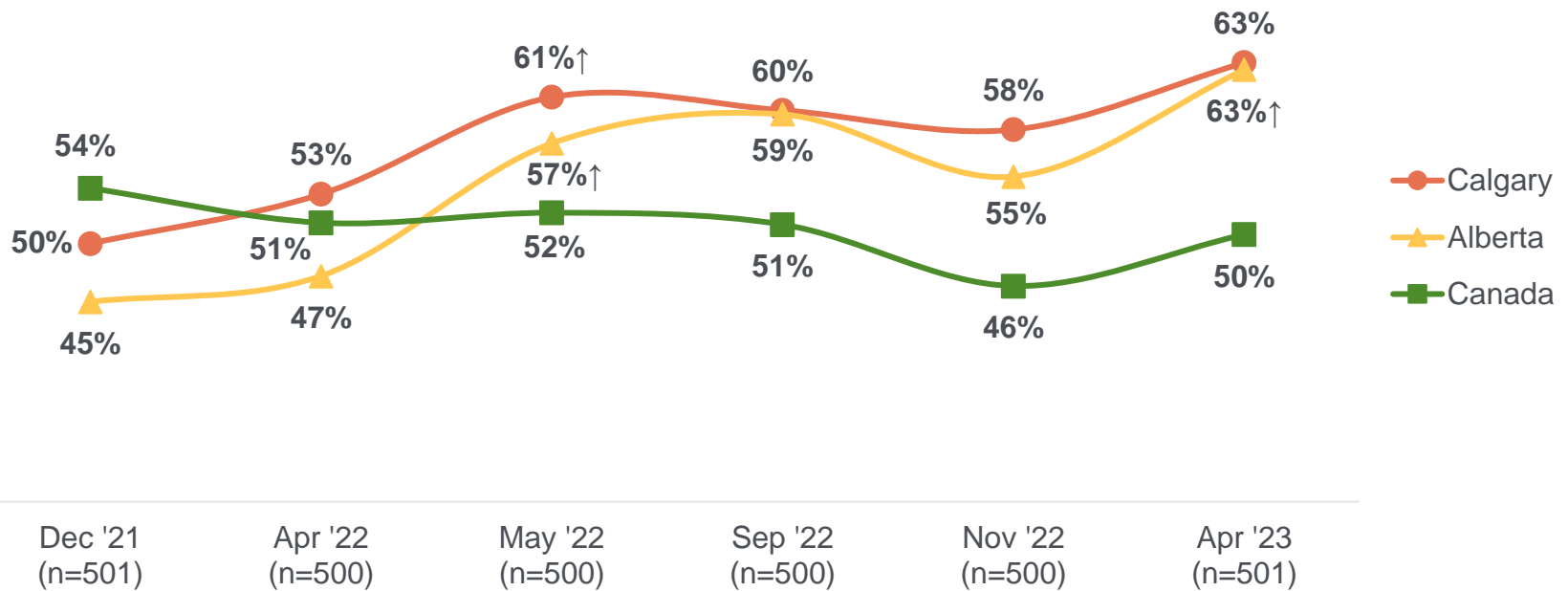


Tracking current economic situation

Positive ratings for the current economic situation in Alberta increased from 55% in November 2022 to 63% this quarter.

- The incidence of those rating the economic situation in Calgary and Canada as “good” increased as well, but only nominally (not significantly).

Rating current economic situation ('Good' ratings)



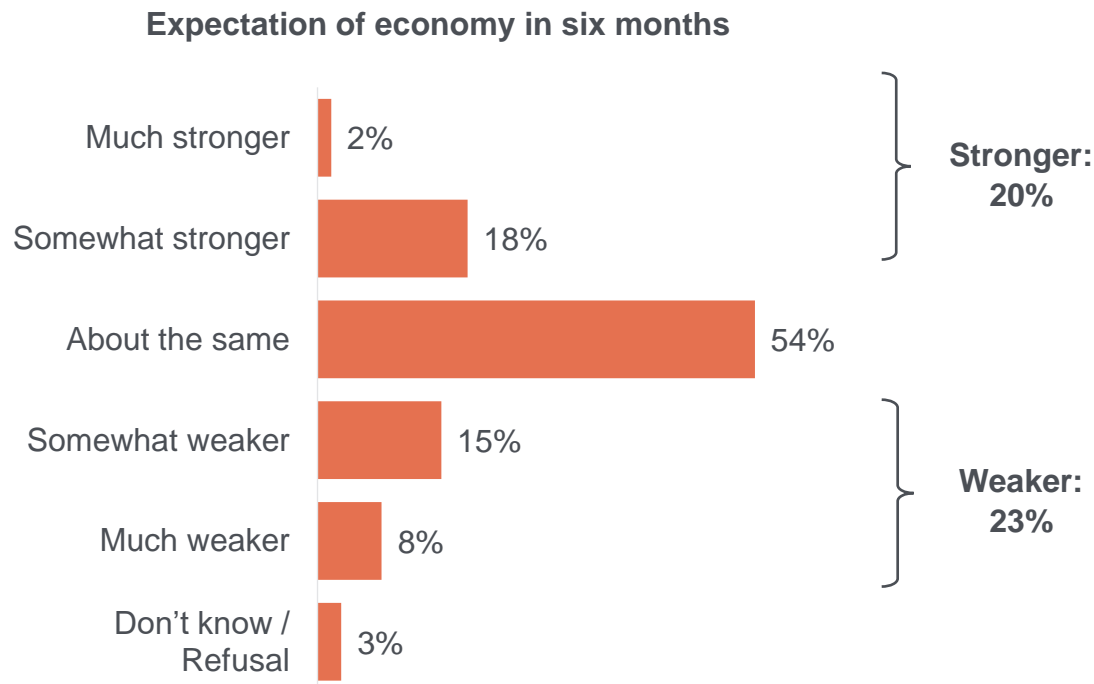
Q6. How would you describe the current economic situation in...?
Base: all respondents

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



Future of the economy in Calgary

Just over half (54%) of Calgarians expect the economy in Calgary to be about the same six months from now. One-in-five (20%) Calgarians expect the economy to be stronger in six months, and a similar number (23%) expect it to be weaker.



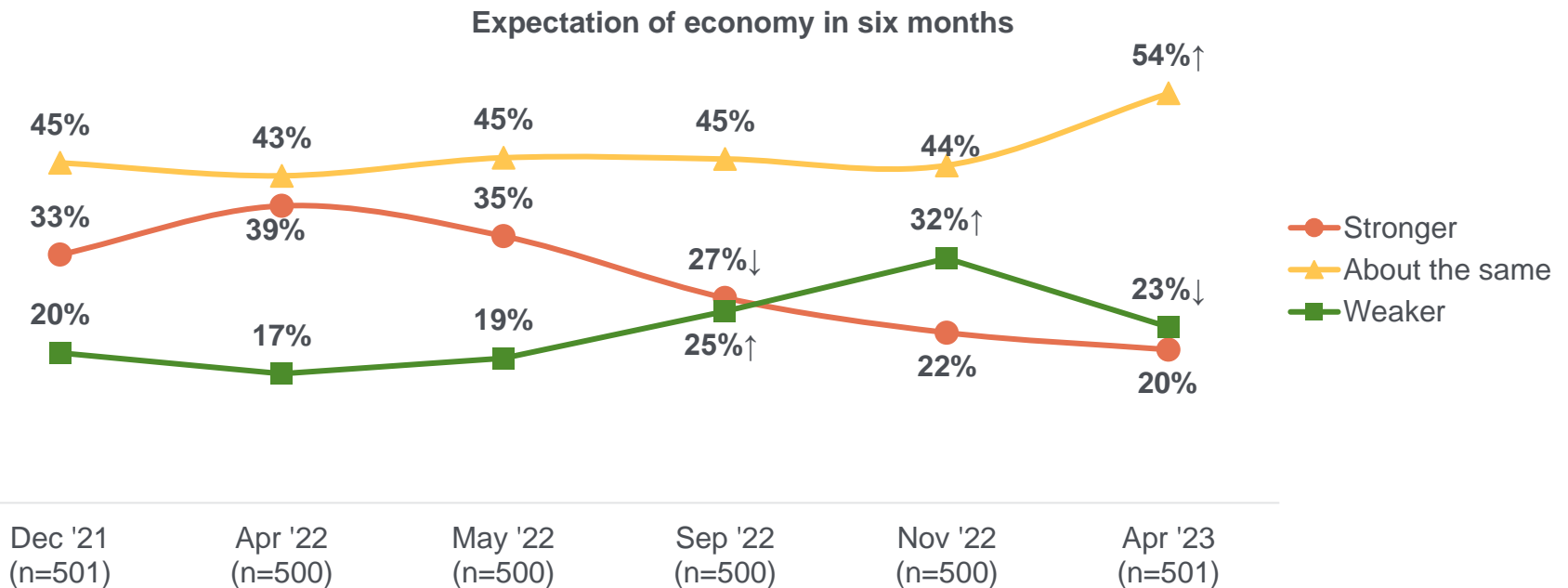
Q7. Looking ahead six months from now, do you expect the economy in Calgary to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?
 Base: all respondents (n=501)

* Rounding



Tracking future of the economy in Calgary

Since April 2022, the proportion of Calgarians who expect Calgary’s economy to be stronger in six months has been trending downwards and is currently sitting at 20%. However, the proportion who expect Calgary’s economy to be weaker in six months has also declined since November 2022 as a result of more Calgarians expecting no short-term changes in Calgary’s economy.



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

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

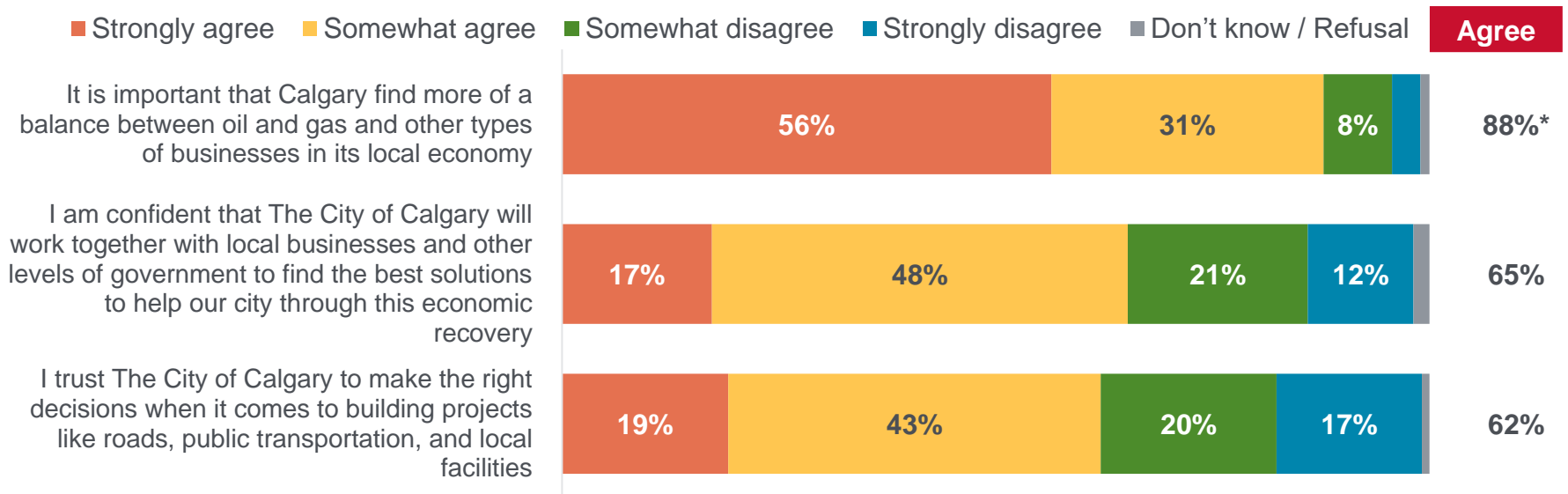


Perceptions of The City's role in the economic recovery and investments [1/2]

Almost nine-in-ten (88%) Calgarians agree that it is important that Calgary finds more of a balance between oil and gas and other types of businesses in its local economy.

- Two-thirds (65%) are confident that The City will work together with local businesses and other levels of government to find the best solutions to help the city through the economic recovery. And three-in-five (62%) trust The City to make the right decisions in terms of building projects.

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



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.
Base: all respondents (n=501)

* Rounding

Data labels <4% not shown



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

Three-in-five (60%) Calgarians trust The City to make the right decisions to help the city through this economic recovery, while just under three-in-five (56%) believe that municipal government is taking the appropriate measures to assist in Calgary's economic recovery.

- A minority (39%) of Calgarians agree that The City is making an effort to reduce the cost of local government.

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

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

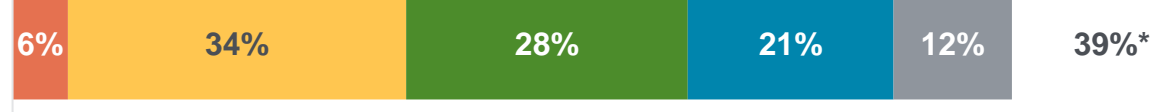
I trust The City of Calgary to make the right decisions to help our city through this economic recovery



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



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



Q9A. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements regarding the role you would like to see The City of Calgary play in the current economic recovery.
 Base: all respondents (n=501)

* Rounding

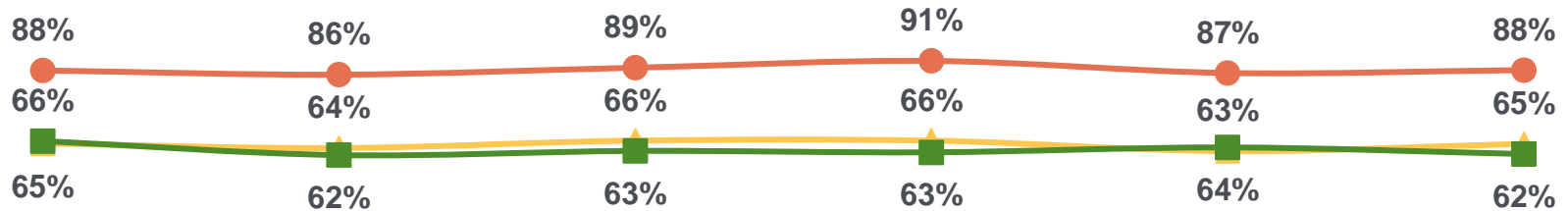
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Tracking perceptions of The City's role in the economic recovery and investments [1/2]

Calgarians' perceptions of The City's role in economic recovery have remained stable since December 2021, with the importance of Calgary finding more of a balance between oil and gas and other types of businesses in its local economy remaining a priority.

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



Dec '21
(n=501)

Apr '22
(n=500)

May '22
(n=500)

Sep '22
(n=500)

Nov '22
(n=500)

Apr '23
(n=501)

- It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy
- ▲ I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery
- I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities

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

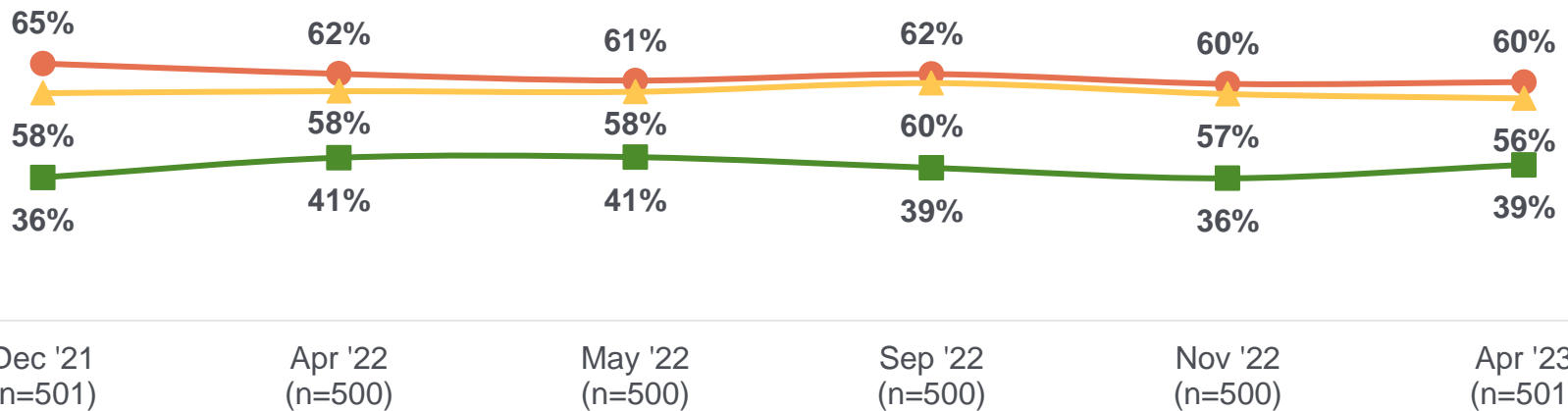
↑ Statistically higher than the previous wave
↓ Statistically lower than the previous wave



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

Same as for the previous statements, Calgarians' perceptions of The City's role in economic recovery have remained stable since December 2021.

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



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

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

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

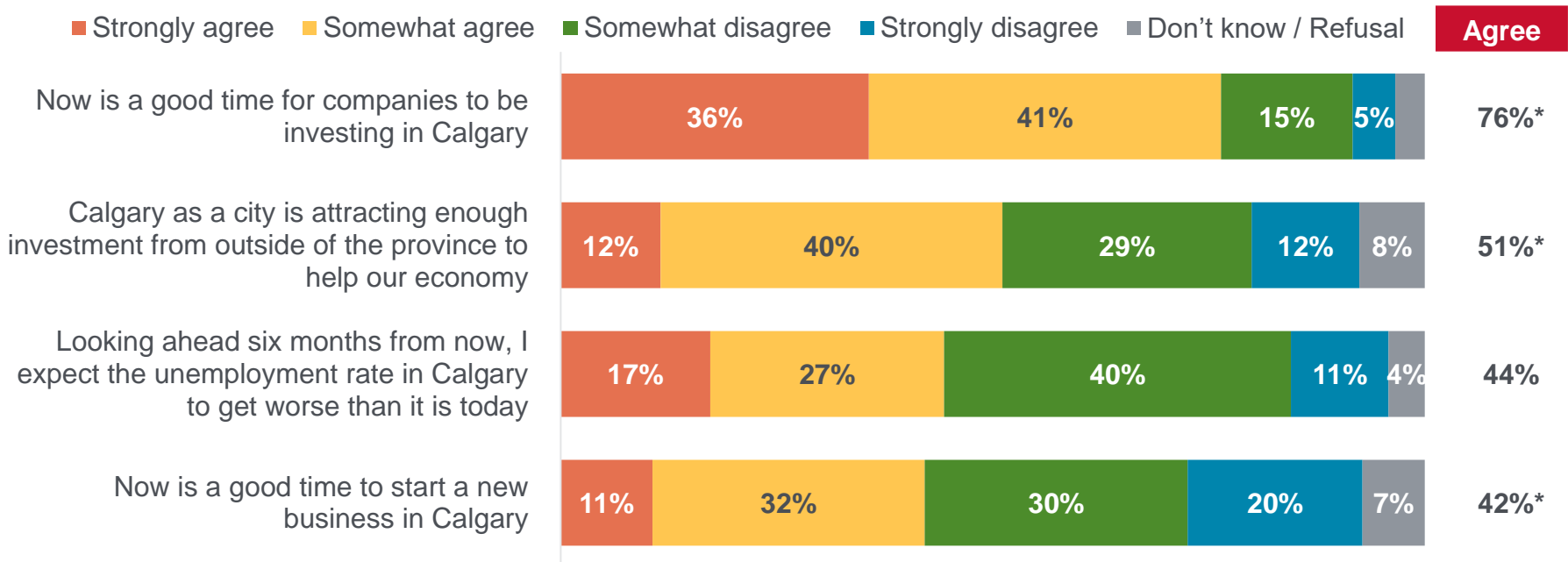


Perceptions of Calgary's economic recovery and investments

Three-in-four (76%) Calgarians believe that now is a good time for companies to be investing in Calgary and half (51%) believe that Calgary is attracting enough out-of-province investment to help the economy.

- A minority of Calgarians believe that the unemployment rate in Calgary will worsen in 6 months' time (44% agree) and that now is a good time to start a new business in Calgary (42% agree).

Agreement with perceptions of Calgary's economic recovery



Q9B. And to what extent do you agree or disagree with each of the following statements about the current economy?

Base: all respondents (n=501)

* Rounding

Data labels <4% not shown

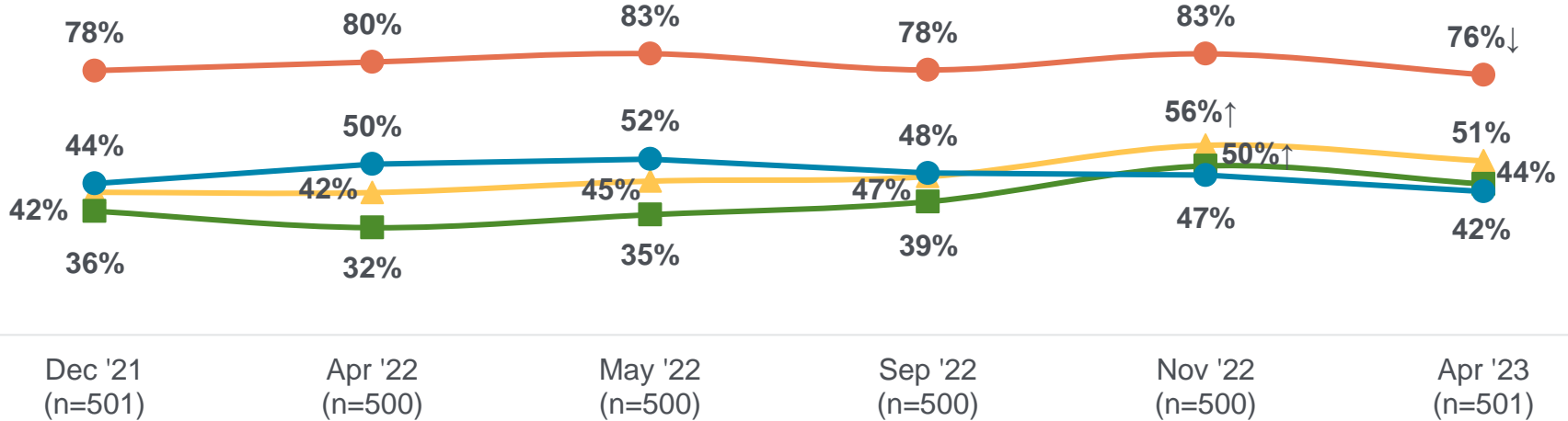


Tracking perceptions of Calgary's economic recovery and investments

Agreement that now is a good time for companies to be investing in Calgary decreased significantly from 83% in November 2022 to 76% this wave.

- Agreement with each of the other statements has remained stable.

Agreement with perceptions of Calgary's economic recovery



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

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

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



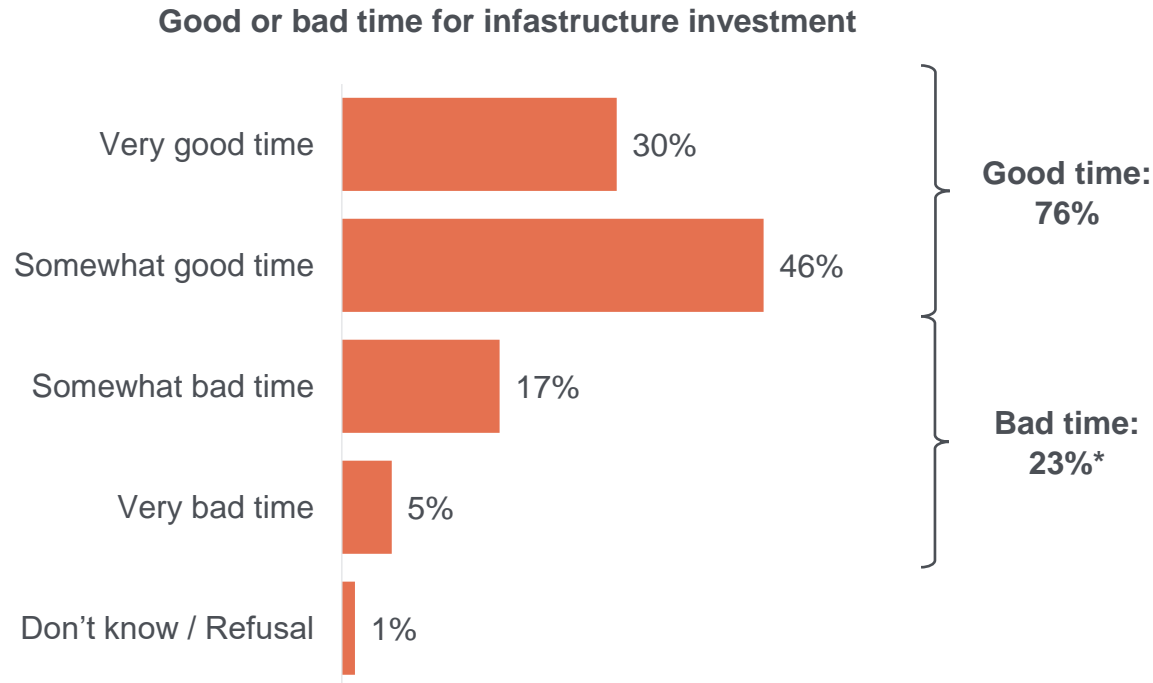
Detailed findings

Infrastructure investment



Infrastructure investment

Three-quarters (76%) of Calgarians believe it is a good time for The City to invest in new projects like roads, public transportation, and local facilities.



II1. Generally speaking, do you think that it is a good time or a bad time for The City of Calgary to be investing in new projects like roads, public transportation, and local facilities?
 Base: all respondents (n=501)

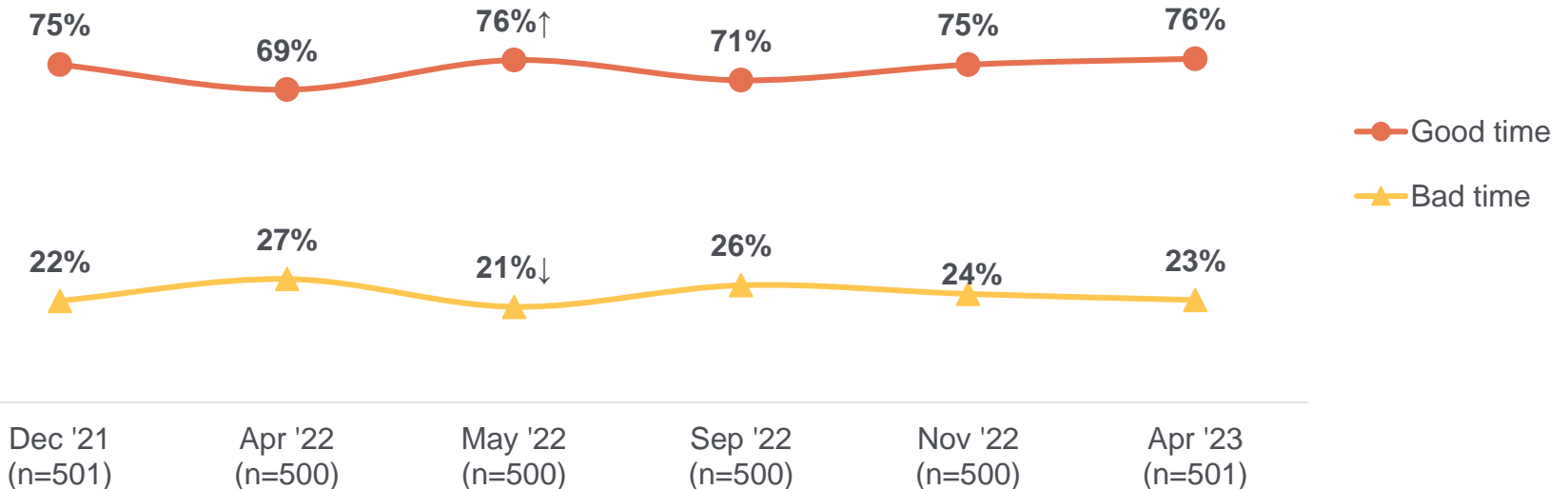
* Rounding



Tracking infrastructure investment

The proportion of Calgarians who believe it is a good time for The City of Calgary to invest in infrastructure has remained stable since May 2022.

Good or bad time for infrastructure investment



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

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



Importance of different infrastructure investments

To measure the perceived importance of different infrastructure investments, a Best Object Scaling (BOS) approach was used:

- Survey respondents were shown various types of projects and asked to select the one they felt is most important. This process was repeated several times using different project combinations, and each time the respondent was forced to make a discriminating choice amongst them (see images below).
- Results were then aggregated across all respondents. The explicit trade-offs made by participants are used to reveal a statistically valid scale we can then use to measure relative project preference.

I12BOS1 - We would like to get your input on the level of importance you would place on different types of infrastructure projects. For each of the next few questions, I will list two types of projects and will ask you to let me know which, if any, type of projects you think is most important.

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

- 1__ Projects that will be used for multiple purposes, for example both recreation and arts
- 2__ Or Projects that will have a positive social impact
- 3__ Or neither of these?
- 4__ [DO NOT READ] Don't know
- 5__ [DO NOT READ] Prefer not to answer

I12BOS2 - And which, if any, of the following types of projects do you think is most important?

- 1__ Projects that will create jobs
- 2__ Or Projects that will enhance economic diversity
- 3__ Or neither of these?
- 4__ [DO NOT READ] Don't know
- 5__ [DO NOT READ] Prefer not to answer

I12BOS3 - The next two are:

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

- 1__ Projects that will enhance economic diversity
- 2__ Or Projects that will encourage trade and tourism
- 3__ Or neither of these?
- 4__ [DO NOT READ] Don't know
- 5__ [DO NOT READ] Prefer not to answer

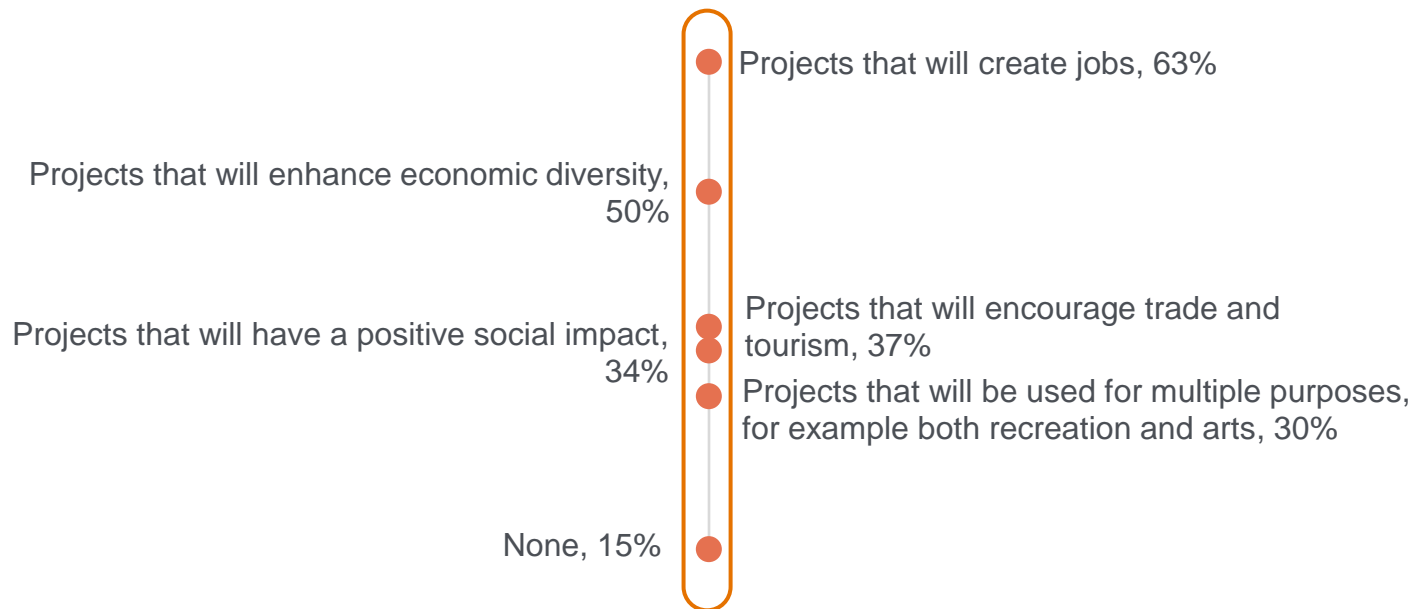


Importance of different infrastructure investments

Calgarians feel that infrastructure projects that will create jobs (63%) are most important; almost twice as much as projects that will encourage trade and tourism (37%), those that will have a positive social impact (34%) or projects that will be used for multiple purposes (30%).

- Projects that will enhance economic diversity (50%) are also a priority for Calgarians.

Importance of infrastructure investments



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

Base: all respondents (n=501)



Detailed findings

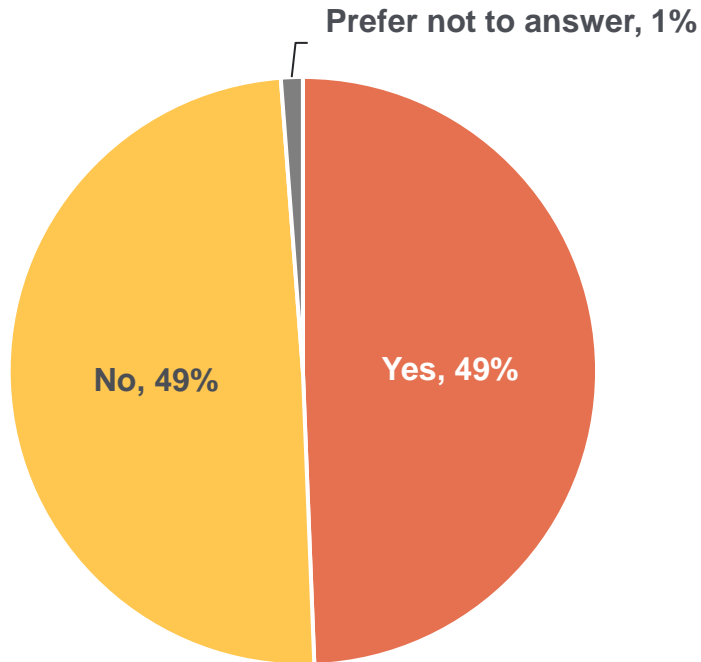
Taxes and user fees



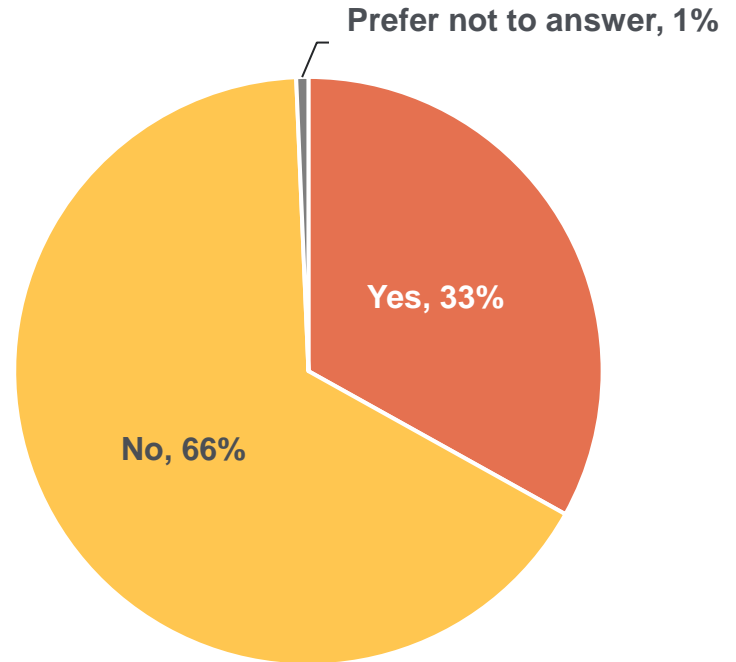
Awareness of The City collecting provincial property tax

Half (49%) of Calgarians are aware that The City collects property tax on behalf of the provincial government, while only one-third (33%) are aware that approximately 35% of taxes collected by The City are transferred to the Province.

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



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



PT1. Were you aware that The City of Calgary collects provincial property tax on behalf of the provincial government?
 PT2. Were you aware that approximately 35 per cent of taxes The City collects is transferred to the Province?
 Base: all respondents (n=501)

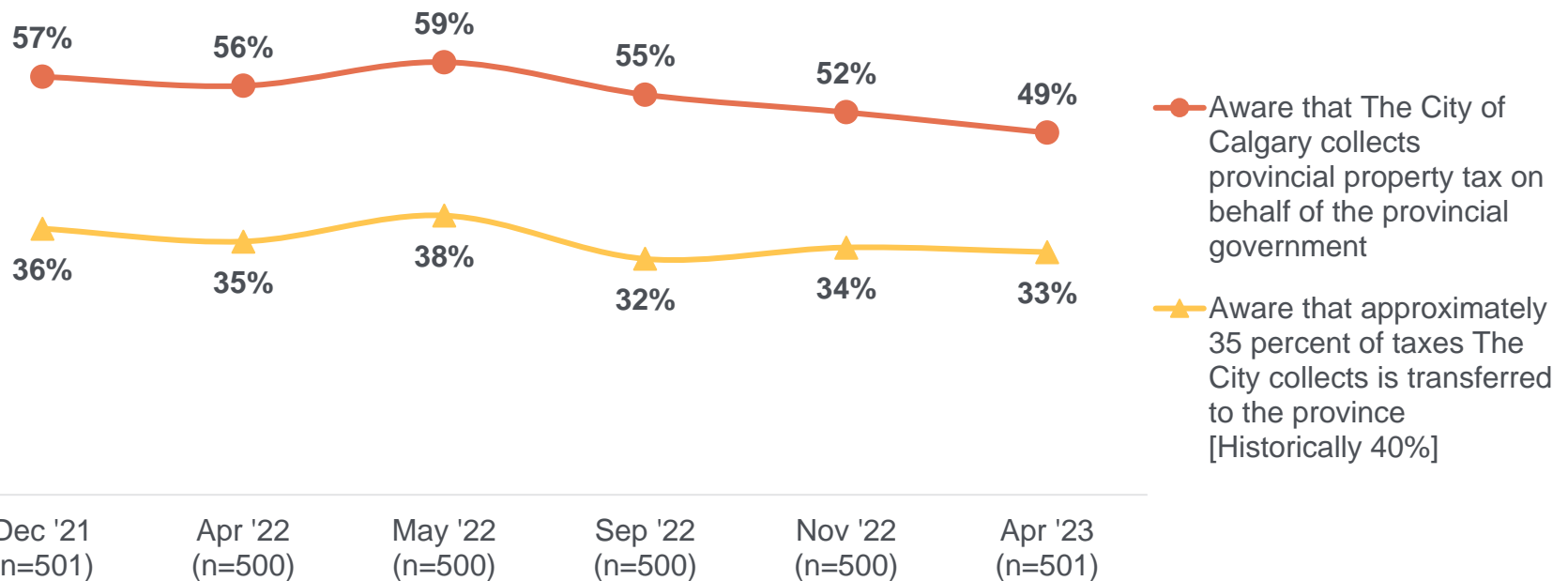


Tracking awareness of The City collecting provincial property tax

The proportion of those who are aware The City collects provincial property tax on behalf of the Province has been declining since May 2022 and currently sits at 49%.

- Awareness that 35% (40% in past surveys) of taxes collected by The City are transferred to the Province has remained stable since December 2021.

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



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

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

Base: all respondents

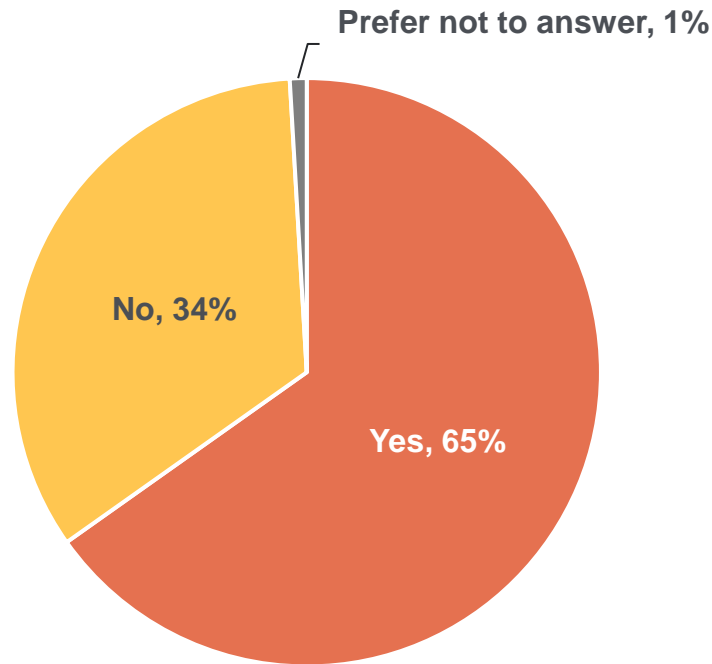
↑ Statistically higher than the previous wave
 ↓ Statistically lower than the previous wave



Awareness of how City services are funded

Two-thirds (65%) of residents 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.

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



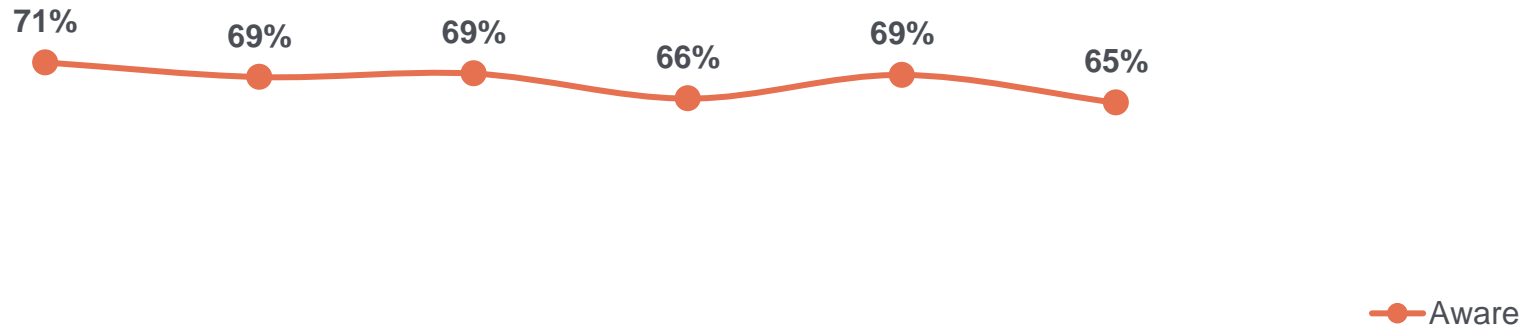
PT3. Were you aware that some services are funded through municipal property tax only, some through user and service fees, and some through a combination of both tax and fees?
 Base: all respondents (n=501)



Tracking awareness of how City services are funded

Awareness of how municipal services are funded has remained fairly consistent over the past year.

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



Dec '21
(n=501)

Apr '22
(n=500)

May '22
(n=500)

Sep '22
(n=500)

Nov '22
(n=500)

Apr '23
(n=501)

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

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



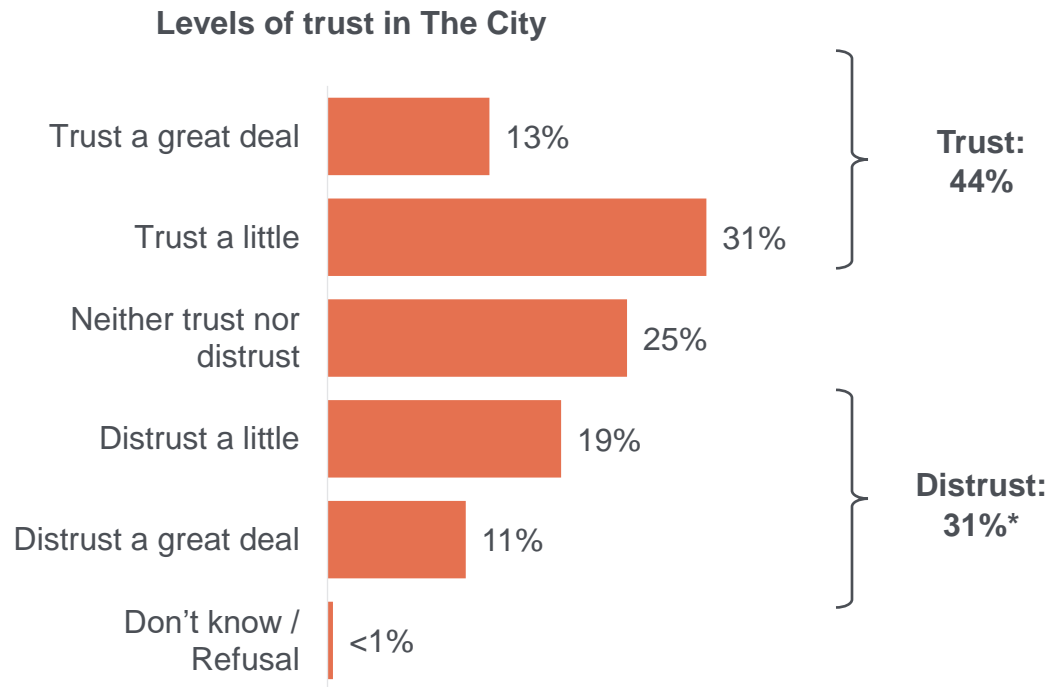
Detailed findings

Trust and reputation



Levels of trust in The City

Less than half (44%) of Calgarians trust The City while just under one-third (31%) distrust The City.



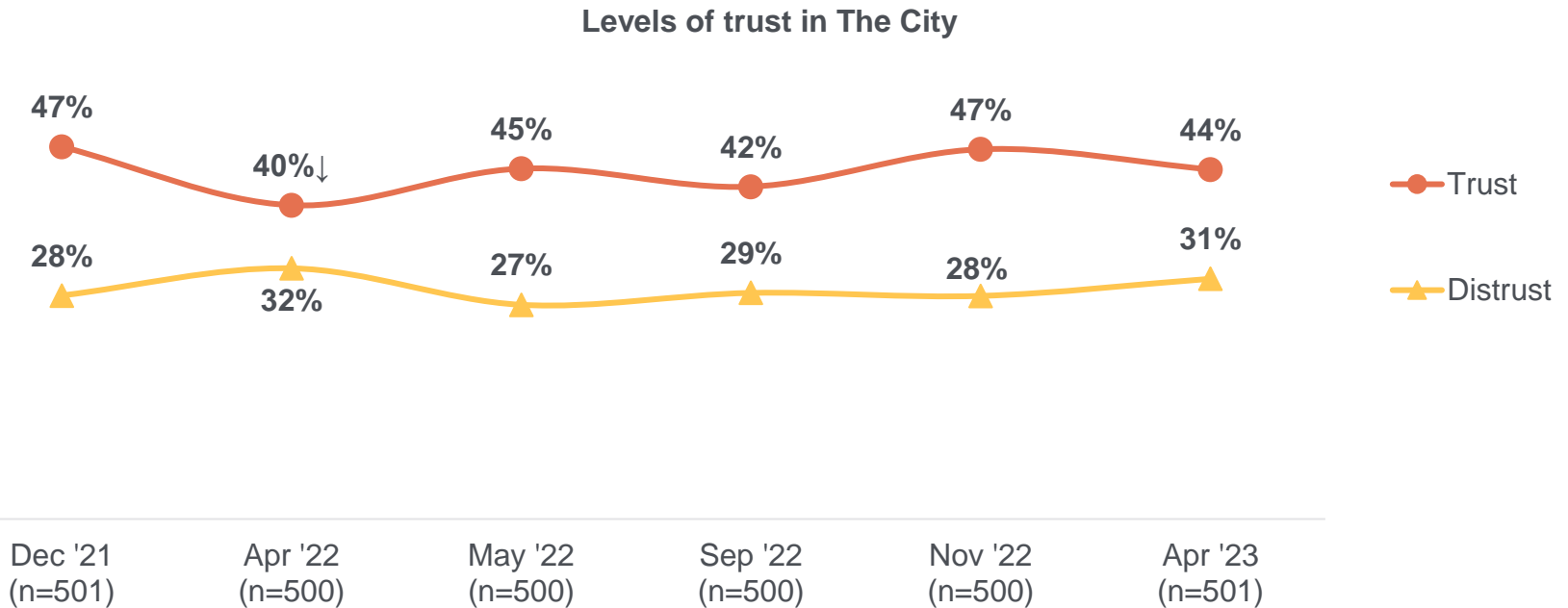
TR1. Taking into account all of the things which you think are important, how much do you trust or distrust The City of Calgary?
 Base: all respondents (n=501)

* Rounding



Tracking levels of trust in The City

The level of trust in The City has remained fairly stable since May 2022.



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

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

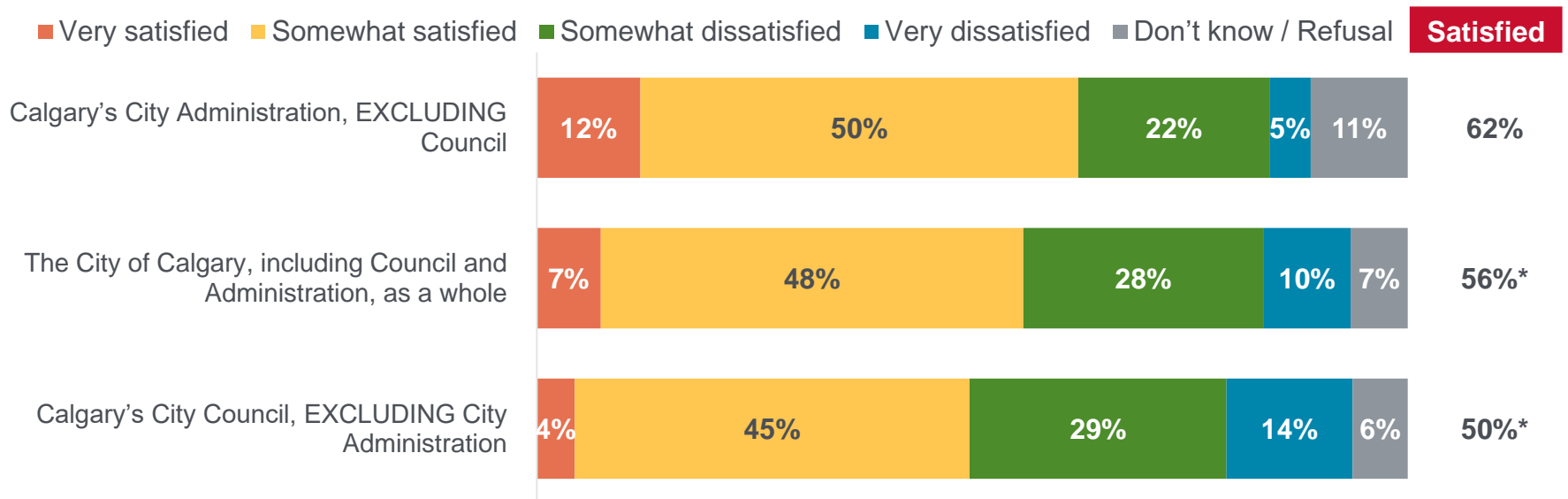


Satisfaction with The City

Just over half (56%) of Calgarians are satisfied with how The City is going about running the city.

- Satisfaction with City Administration is higher compared to satisfaction with City Council (62% vs. 50%, respectively).

Satisfaction with each group



* Rounding

Data labels <4% not shown

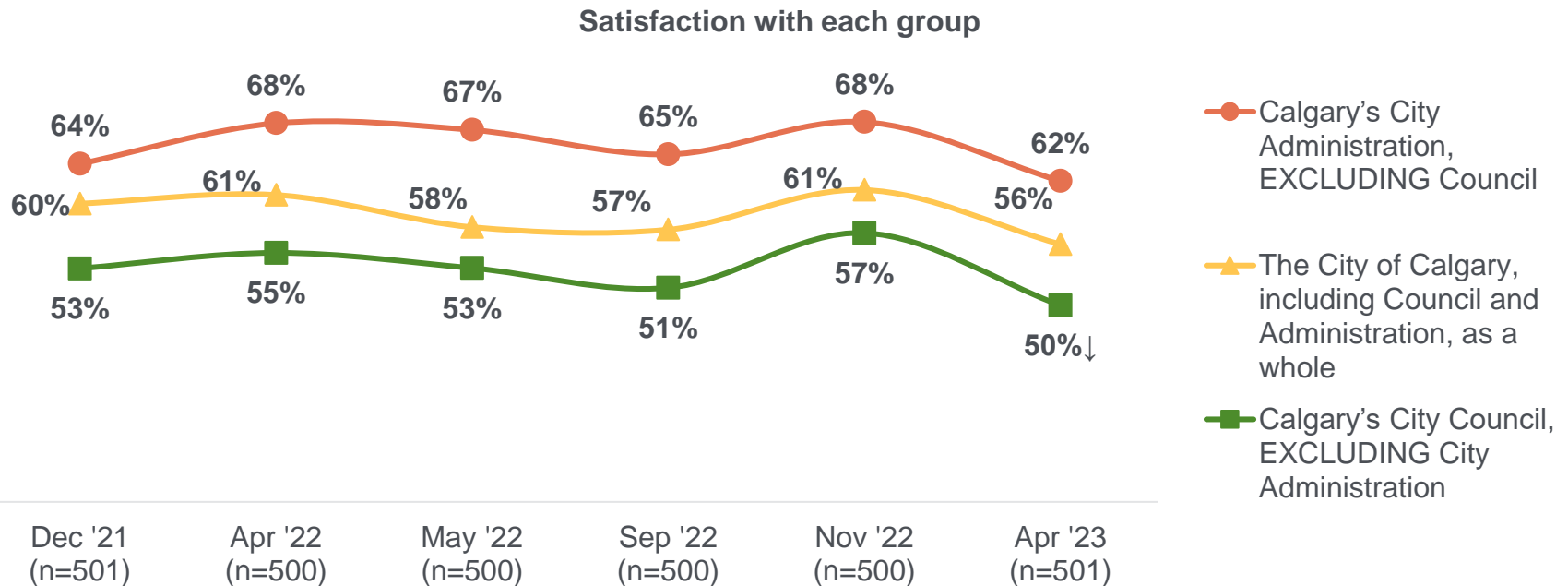
TR2. Taking everything into account, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the way the following groups are going about running our City?
 Base: all respondents (n=501)



Tracking satisfaction with The City

Satisfaction with City Council decreased significantly from 57% in November 2022 to 50% this quarter.

- Satisfaction with City Administration and The City as a whole decreased as well, but only nominally (not significantly).



TR2. Taking everything into account, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the way the following groups are going about running our City?
 Base: all respondents

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



Detailed findings

Segment differences



Segment differences

- The tables on the next few slides show comparisons of key metrics by several sub-segments of Calgary’s population.
- Any statistical differences between demographic groups are indicated with arrows to indicate where a group is statistically higher or lower than all other segments combined.
 - To illustrate, the statistical tests performed when comparing three groups are as follows:



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

	Age group		
	18-34 (n=82)	35-54 (n=185)	55+ (n=234)
Current economic situation: Canada (% good)	51%	56%	43%↓



Segment differences

- Those less likely to describe Canada’s economic situation as “good” include female Calgarians (45%) and those aged 55+ (43%).
- Calgarians aged 35 to 54 are more likely to believe it is a good time for infrastructure investments.
- Levels of trust in The City are relatively lower among those who live in the Southwest quadrant (33%), while those who live in the Northeast quadrant report higher trust (57%).

	Gender		Age group			Quadrant			
	Female (n=223)	Male (n=268)	18-34 (n=82)	35-54 (n=185)	55+ (n=234)	S.W. (n=139)	S.E. (n=114)	N.W. (n=155)	N.E. (n=93)
Overall quality of life in Calgary (% good)	67%	72%	74%	65%	71%	70%	72%	70%	63%
Current economic situation: Calgary (% good)	60%	68%	64%	65%	60%	58%	67%	69%	58%
Current economic situation: Alberta (% good)	60%	66%	64%	61%	64%	58%	68%	65%	59%
Current economic situation: Canada (% good)	45% ↓	56% ↑	51%	56%	43% ↓	48%	54%	52%	46%
Expectation of economy in six months (% stronger)	19%	22%	19%	20%	22%	17%	25%	18%	22%
Good or bad time for infrastructure investments (% good time)	73%	80%	71%	82% ↑	72%	75%	78%	77%	72%
Levels of trust in The City (% trust)	46%	43%	44%	46%	43%	33% ↓	47%	47%	57% ↑
Satisfaction with The City (% satisfied)	59%	54%	59%	56%	53%	49%	56%	57%	65%

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

Base: all respondents



Segment differences

- Calgarians who have children under the age of 18 living in their household are less likely to rate the overall quality of life in Calgary as “good” (62% vs. 74% for those with no children) but are more likely to rate the current economic situation in Canada as “good” (58% vs. 46% for those with no children).
- Households that make less than \$90k per year are less likely to rate quality of life in Calgary as “good” (62%) and to rate the current economic situation in Calgary and in Canada as “good” (58% and 42% respectively) while households with incomes between \$90k to \$150k are more likely to rate quality of life in Calgary as “good” (79%) and to rate the economic situation in Canada as “good” (63%).

	Children in HH		BIPOC		Household income		
	Yes	No	Yes	No	<\$90k	\$90k- <\$150k	\$150k+
	(n=154)	(n=343)	(n=114)	(n=357)	(n=179)	(n=127)	(n=138)
Overall quality of life in Calgary (% good)	62% ↓	74% ↑	72%	69%	62% ↓	79% ↑	73%
Current economic situation: Calgary (% good)	66%	63%	64%	64%	58% ↓	70%	69%
Current economic situation: Alberta (% good)	62%	64%	61%	64%	59%	65%	69%
Current economic situation: Canada (% good)	58% ↑	46% ↓	57%	48%	43% ↓	63% ↑	53%
Expectation of economy in six months (% stronger)	19%	21%	23%	20%	21%	22%	19%
Good or bad time for infrastructure investments (% good time)	75%	77%	72%	78%	72%	83%	77%

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

Base: all respondents



Segment differences

- Levels of trust in The City are lower for households with incomes more than \$150k (34%).

	Children in HH		BIPOC		Household income		
	Yes	No	Yes	No	<\$90k	\$90k- <\$150k	\$150k+
	(n=154)	(n=343)	(n=114)	(n=357)	(n=179)	(n=127)	(n=138)
Levels of trust in The City (% trust)	48%	43%	49%	43%	50%	47%	34%↓
Satisfaction with The City (% satisfied)	57%	56%	60%	55%	61%	57%	51%

Base: all respondents

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



Respondent profile



Respondent profile

Gender	Weighted %	Unweighted %
Female	49%	45%
Male	49%	53%
Prefer to self-describe	<1%	<1%
Prefer not to answer	2%	2%

Quadrant	Weighted %	Unweighted %
Southwest	29%	28%
Southeast	24%	23%
Northwest	31%	31%
Northeast	16%	19%

Age	Weighted %	Unweighted %
18-24	10%	6%
25-34	20%	11%
35-44	22%	20%
45-54	17%	17%
55-64	11%	16%
65-74	12%	19%
75+	8%	12%

People in household	
1	14%
2	30%
3	20%
4 or more	35%
Prefer not to answer	1%

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

Senior in household	
Yes	32%
No	68%
Prefer not to answer	<1%

Tenure in Calgary	
Less than 10	15%
10-20	24%
21-30	23%
31-40	15%
Over 40	21%
Prefer not to answer	1%

Disability in household	
Yes - myself	6%
Yes - someone in my household	12%
No	81%
Prefer not to answer	1%

Identify as 2SLGBTQ+	
Yes	6%
No	92%
Prefer not to answer	2%

Base: all respondents (n=501)



Respondent profile

Employment status	
Employed full-time	58%
Employed part-time	10%
Retired	19%
Looking after home / family	3%
Unable to work	3%
Unemployed	5%
Unpaid / volunteer work	<1%
Student	5%
Other	<1%
Prefer not to answer	1%

Business owner	
Yes	20%
No	80%
Prefer not to answer	<1%

Annual household income	
Less than \$90,000	35%
\$90,000 to just under \$150,000	26%
\$150,000 and over	29%
Don't Know	4%
Prefer not to answer	6%

Racialized	
Yes	23%
No	73%
Prefer to self-describe	<1%
Prefer not to answer	4%

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

Education	
Completed high school or less	22%
Some post secondary or completed a college diploma	27%
Completed university degree	50%
Prefer not to answer	1%

Base: all respondents (n=501)

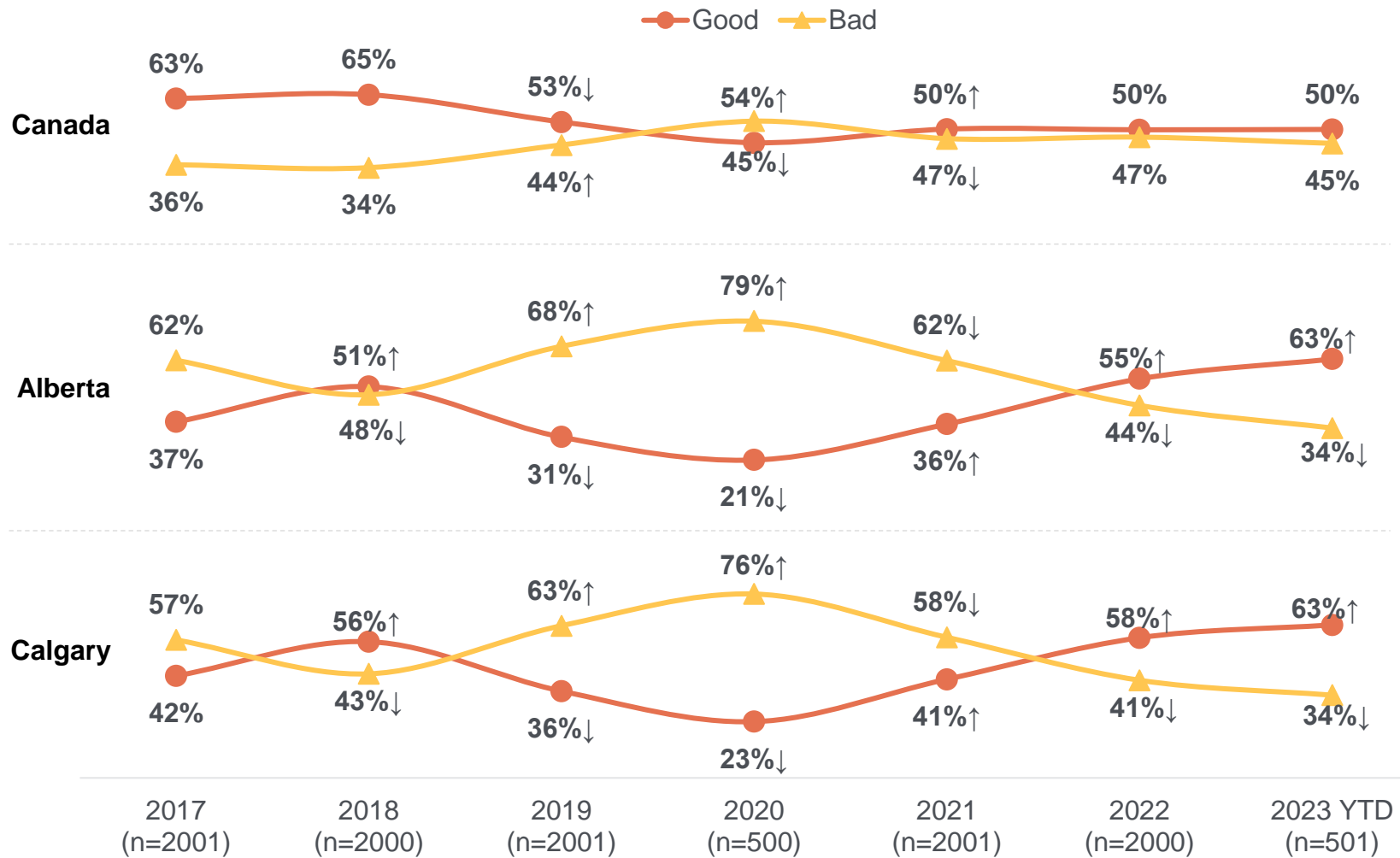


Appendix

Tracking



Tracking current economic situation



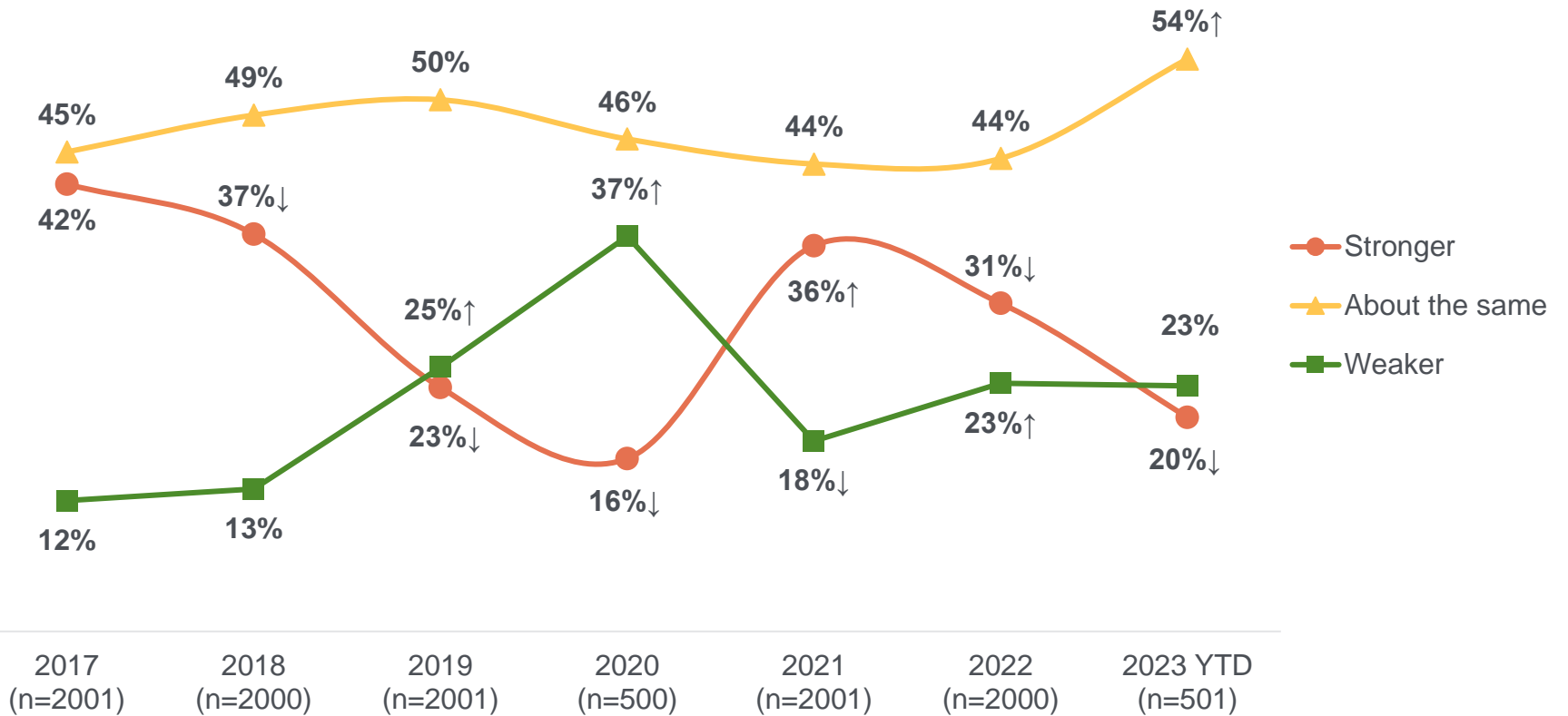
Q6. How would you describe the current economic situation in...?
Base: all respondents

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



Tracking Future Economy in Calgary

Expectation of economy in six months



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

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



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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 YTD (n=501)
It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy	91%	92%	91%	92%	88%↓	88%	88%
I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery	77%	73%↓	66%↓	68%	70%	65%↓	65%
I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities	Added in April 2021				67%	63%↓	62%
I trust The City of Calgary to make the right decisions to help our city through this economic recovery	73%	68%↓	63%↓	66%	66%	61%↓	60%
The City of Calgary municipal government is taking appropriate measures to assist in Calgary’s economic recovery	Added in April 2021				61%	58%	56%
The City of Calgary is making an effort to reduce the cost of local government	Added in April 2021				41%	39%	39%

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

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



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

	2017 (n=2001)	2018 (n=2000)	2019 (n=2001)	2020 (n=500)	2021 (n=2001)	2022 (n=2000)	2023 YTD (n=501)
Now is a good time for companies to be investing in Calgary	77%	73%↓	68%↓	62%↓	74%↑	81%↑	76%
Calgary as a city is attracting enough investment from outside of the province to help our economy				Added in April 2021	37%	47%↑	51%
Looking ahead six months from now, I expect the unemployment rate in Calgary to get worse than it is today	37%	36%	50%↑	60%↑	39%↓	39%	44%↑
Now is a good time to start a new business in Calgary	43%	44%	33%↓	31%	39%↑	49%↑	42%↓

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

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



Questionnaire



Economic Perspectives Survey: 2023 Q1



City of Calgary

Int0

Hello, I'm _____ with Advanis, calling on behalf of The City of Calgary. We are conducting a study among adult Calgarians about several important issues and we'd like to include your views. Are you 18 years of age or older and do you currently live in Calgary?

IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "2023 Economic Perspectives Survey." City Staff would be happy to address your concerns.

IF ASKED: The survey will take approximately 15 minutes.

- 1 Yes
- 2 Yes, getting an adult *(Show if is landline (phonetype = 1))*
- 3 No, refusal
- 4 No, callback
- 5 No, under 18 *(Show if is wireless (phonetype = 2))*
- 6 No, does not live in Calgary

Int0b *Show if getting person (Int0 = 2)*

Hello, I'm _____ with Advanis, calling on behalf of The City of Calgary. We are conducting a study among adult Calgarians about several important issues and we'd like to include your views. Are you 18 years of age or older and do you currently live in Calgary?

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

- 1 Yes
- 2 No, refusal
- 3 No, callback
- 4 No, under 18 *(Show if is wireless (phonetype = 2))*
- 5 No, does not live in Calgary

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

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

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

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

T13 *Show if int0under35 not 18 to 34 (Int0under35 = 5)*

Unfortunately, we need to speak with individuals who are 18 to 34 years old. Thank you for your time. Good-bye.

SCREENERS

QS7

Great! Your participation is voluntary and this call may be recorded for quality control purposes. The survey will take approximately 15 minutes and your responses will remain confidential, and you will not be personally identified. Any personal information collected in this survey is under the authority of the Freedom of Information and Protection of Privacy Act, Section 33(c) and is used solely for the review and improvement of City of Calgary programs and services.

Do you have any questions about the collection or use of your information?

- 1 Yes
- 2 No
- 3 Refusal
- 4 Call back later

QS7info *Show if QS7 Yes (QS7 = 1)*

A City of Calgary Research Coordinator will be able to answer any questions about the collection or use of your information. You can contact them via phone, email, or regular mail and mention the "2023 Economic Perspectives Survey". What contact information would you prefer?

If phone: 403-268-6732

If email: research@calgary.ca

If mail: Research Coordinator, The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5

QSEX

DO NOT ASK; RECORD GENDER

- 1 Male
- 2 Female

QS4

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

- 1 18 to 19
- 2 20 to 24
- 3 25 to 34
- 4 35 to 44
- 5 45 to 54
- 6 55 to 64
- 7 65 to 74
- 8 75 and older
- 9 **[DO NOT READ]** Prefer not to say



T5 *Show if QS4 ref (QS4 = 9)*

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

QS1

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

WAIT FOR RESPONSE - READ LIST TO CLARIFY IF NEEDED.

- 1 Southwest
- 2 Southeast
- 3 Northwest
- 4 Northeast
- 5 **[DO NOT READ]** Prefer not to say
- 6 **[DO NOT READ]** Does not live in Calgary

T6 *Show if QS1 DK Ref (QS1 = 5)*

Unfortunately we need to confirm what part of The City you live in to continue. Thank you for your time. Good-bye.

T8 *Show if QS1 Outside Calgary (QS1 = 6)*

Unfortunately, we only need to speak with people who live in Calgary. Thank you for your time. Good-bye.

MAIN SURVEY

PERSPECTIVES OF QUALITY OF LIFE AND THE ECONOMY

Q2

To begin, on a scale of "1" to "10" where "1" represents "very poor" and "10" represents "very good" how would you rate the overall quality of life in Calgary today?

- 1 1 = Very poor
- 2 2
- 3 3
- 4 4
- 5 5
- 6 6
- 7 7
- 8 8
- 9 9
- 10 10 = Very good
- 11 **[DO NOT READ]** Don't know
- 12 **[DO NOT READ]** Prefer not to answer

Q6

How would you describe the current economic situation in [READ FIRST ITEM]? Is it very good, somewhat good, somewhat bad or very bad?

How about in ...?

1. Canada *
2. Alberta *
3. Calgary *

*Levels marked with * are randomized*

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



Questionnaire

Q7

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

- 1 Much stronger
- 2 Somewhat stronger
- 3 About the same
- 4 Somewhat weaker
- 5 Much weaker
- 9 [DO NOT READ] Don't know
- 10 [DO NOT READ] Prefer not to answer

Q9a

In this survey, when we say 'The City of Calgary' or 'The City', we mean the Municipal government including Council and Administration.

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

1. I am confident that The City of Calgary will work together with local businesses and other levels of government to find the best solutions to help our city through this economic recovery *
2. I trust The City of Calgary to make the right decisions to help our city through this economic recovery *
3. I trust The City of Calgary to make the right decisions when it comes to building projects like roads, public transportation, and local facilities *
4. It is important that Calgary find more of a balance between oil and gas and other types of businesses in its local economy *
5. The City of Calgary municipal government is taking appropriate measures to assist in Calgary's economic recovery *
6. The City of Calgary is making an effort to reduce the cost of local government *

*Levels marked with * are randomized*

- 1 Strongly agree
- 2 Somewhat agree
- 3 Somewhat disagree
- 4 Strongly disagree
- 9 [DO NOT READ] Don't know
- 10 [DO NOT READ] Prefer not to answer

Q9b

And to what extent do you agree or disagree with each of the following statements about the current economy?

REPEAT LIST ONLY IF NEEDED

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

*Levels marked with * are randomized*

- 1 Strongly agree
- 2 Somewhat agree
- 3 Somewhat disagree
- 4 Strongly disagree
- 9 [DO NOT READ] Don't know
- 10 [DO NOT READ] Prefer not to answer

PERSPECTIVES OF TAX & USER FEES

PT1

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

In Calgary, property tax dollars are divided between The City and the Alberta provincial government. Approximately 65 percent of property tax collected in Calgary is invested in City services and programs, while the remaining 35 percent goes to the Government of Alberta.

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

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

PT2

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

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



Questionnaire

PT3

As you may know, services delivered by The City are funded through municipal property tax, user and service fees, or a combination of both.

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?

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

PERSPECTIVES OF INFRASTRUCTURE INVESTMENT

II1

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

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

II2BOS1

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

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

Items to show:

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

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

II2BOS2

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

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

II2BOS3

The next two are:

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

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



Questionnaire

II2B054

And the next two are:

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

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

II2B055

And one last set:

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

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

PERSPECTIVES OF TRUST AND REPUTATION

TR1

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

- 1 Trust a great deal
- 2 Trust a little
- 3 Neither trust nor distrust *
- 4 Distrust a little
- 5 Distrust a great deal
- 9 [DO NOT READ] Don't know
- 10 [DO NOT READ] Prefer not to answer

*Levels marked with * are randomized*

TR2

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.

Taking everything into account, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the way the following groups are going about running our City?

1. The City of Calgary, **including** Council and Administration, as a whole *
2. Calgary's City Council, **excluding** City Administration *
3. Calgary's City Administration, **excluding** Council

*Levels marked with * are randomized*

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



DEMOGRAPHICS

QD1

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

In what year were you born?

Minimum: 1900, Maximum: 2005

-a Prefer not to answer

QD2

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

Minimum: 1, Maximum: 50

_____ people

-a Prefer not to answer

QD3 *Show if HH Members More Than 1 (QD2 > 1)*

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

DO NOT READ LIST

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

QD4 *Show if HH Members More Than 1 and under 65 ((QD2 > 1) AND (QS4 = 1,2,3,4,5,6))*

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

DO NOT READ LIST

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

QD6

How many years have you lived in Calgary?

IF LESS THAN 1 YEAR, ENTER 0

Minimum: 0, Maximum: 100

_____ years

-a Prefer not to answer

QD7

Which of the following best describes the highest level of schooling that you have obtained?

If the respondent mentions that they completed a post-graduate degree / Master's / PhD, please code as "completed a university certificate, diploma or degree".

- 1 Did not complete high school or equivalent
- 2 Completed high school or equivalent
- 3 Completed a Registered Apprenticeship or other trades certificate or diploma
- 4 Completed a college or other non-university certificate or diploma
- 5 Or completed a university certificate, diploma or degree
- 9 **[DO NOT READ]** Prefer not to answer

QD8

What best describes your current employment status? Please stop me when I get to your category. Would you say you are...

READ LIST; Select up to two responses.

IF NEEDED: "Please tell me the two that best describe your status"

- 1 Full time employed or self employed **[DO NOT READ: 30 hours or more per week]**
- 2 Part time employed or self-employed **[DO NOT READ: less than 30 hours per week]**
- 3 Retired
- 4 Looking after home and/or family
- 5 Unable to work because of sickness or disability
- 6 Unemployed
- 7 Doing unpaid or voluntary work
- 8 Student
- 96 **[DO NOT READ]** Other (specify:) _____
- 99 **[DO NOT READ]** Prefer not to answer *(Exclusive)*



Questionnaire

QD9 *Show if Employed (QD8_1 = 1 OR QD8_2 = 1)*

Do you own or operate a business in Calgary?

- 1 Yes, own and operate a business
- 2 Yes, own a business
- 3 Yes, operate a business
- 4 No, don't own or operate a business
- 99 **[DO NOT READ]** Prefer not to answer

QD10

Which of the following categories best describes the total annual income, before taxes, of all the members of your household? Please stop me when I get to your category.

READ LIST

- 1 Less than \$90,000
- 2 \$90,000 to just under \$150,000
- 3 \$150,000 and over
- 9 **[DO NOT READ]** Don't Know
- 10 **[DO NOT READ]** Prefer not to answer

QD10ab *Show if QD10 Answered (QD10 = 1,2,3)*

Would that be...

READ LIST - ACCEPT RESPONSES BEFORE FINISHING LIST

- 1 Less than \$30,000 *(Show if D10a Under90k (QD10 = 1))*
- 2 \$30,000 to just under \$45,000 *(Show if D10a Under90k (QD10 = 1))*
- 3 \$45,000 to just under \$60,000 *(Show if D10a Under90k (QD10 = 1))*
- 4 \$60,000 to just under \$75,000 *(Show if D10a Under90k (QD10 = 1))*
- 5 \$75,000 to just under \$90,000 *(Show if D10a Under90k (QD10 = 1))*
- 6 \$90,000 to just under \$105,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- 7 \$105,000 to just under \$120,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- 8 \$120,000 to just under \$135,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- 9 \$135,000 to just under \$150,000 *(Show if D10a 90k to under 150k (QD10 = 2))*
- 10 \$150,000 to just under \$175,000 *(Show if D10a 150k plus (QD10 = 3))*
- 11 \$175,000 to just under \$200,000 *(Show if D10a 150k plus (QD10 = 3))*
- 12 \$200,000 to just under \$225,000 *(Show if D10a 150k plus (QD10 = 3))*
- 13 \$225,000 to just under \$250,000 *(Show if D10a 150k plus (QD10 = 3))*
- 14 \$250,000 and over *(Show if D10a 150k plus (QD10 = 3))*
- 15 **[DO NOT READ]** Don't Know
- 16 **[DO NOT READ]** Prefer not to answer

QD11

What is your gender?

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

- 1 Male
- 2 Female
- 96 Prefer to self-describe (specify) _____
- 99 **[DO NOT READ]** Prefer not to answer

QD15

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

MULTIPLE RESPONSES ARE ACCEPTED

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

QD16 *Show if Not Indigenous (QD15_5 = 1 OR QD15_99 = 1)*

Do you consider yourself a racialized person? A racialized person means someone, other than Indigenous people, who are non-Caucasian in race or non-white in colour.

- 1 Yes
- 2 No
- 96 Prefer to self-describe (specify) _____
- 99 **[DO NOT READ]** Prefer not to answer

QD17

Do you or a member of your household have a disability?

Select all that apply

- 1 Yes - myself
- 2 Yes - someone in my household
- 3 No *(Exclusive)*
- 99 **[DO NOT READ]** Prefer not to answer *(Exclusive)*



Questionnaire

QD18

Do you consider yourself to be a member of the 2SLGBTQ+ community?

ONLY IF ASKED: 2SLGBTQ+ STANDS FOR TWO SPIRIT, LESBIAN, GAY, BI-SEXUAL, TRANSGENDER, QUEER OR QUESTIONING, WITH THE PLUS RECOGNIZING THERE IS ALSO A WIDE SPECTRUM OF IDENTITIES BEYOND THOSE IN THE ACRONYM

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

F1a

Finally, The City of Calgary regularly engages with citizens about municipal matters. Would you be interested in participating in future City research? Your contact information will be shared with The City of Calgary for research purposes only. Names and contact details will never be attached to your responses to this survey.

- 1 Yes
- 2 No
- 3 **[DO NOT READ]** Don't know

F1b *Show if F1a Yes (F1a = 1)*

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

Read back email address phonetically to confirm.

- 8 **[DO NOT READ]** Prefer not to answer

F1c *Show if F1a Yes (F1a = 1)*

Could I please have your first and last name, and confirm your telephone number?

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

First name: _____

Last name: _____

Telephone number: _____

- 8 **[DO NOT READ]** Prefer not to answer

End

end1

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



Contact

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Customer Service and Communications
The City of Calgary
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