

CALGARY IN THE NEW ECONOMY

2023 PROGRESS REPORT

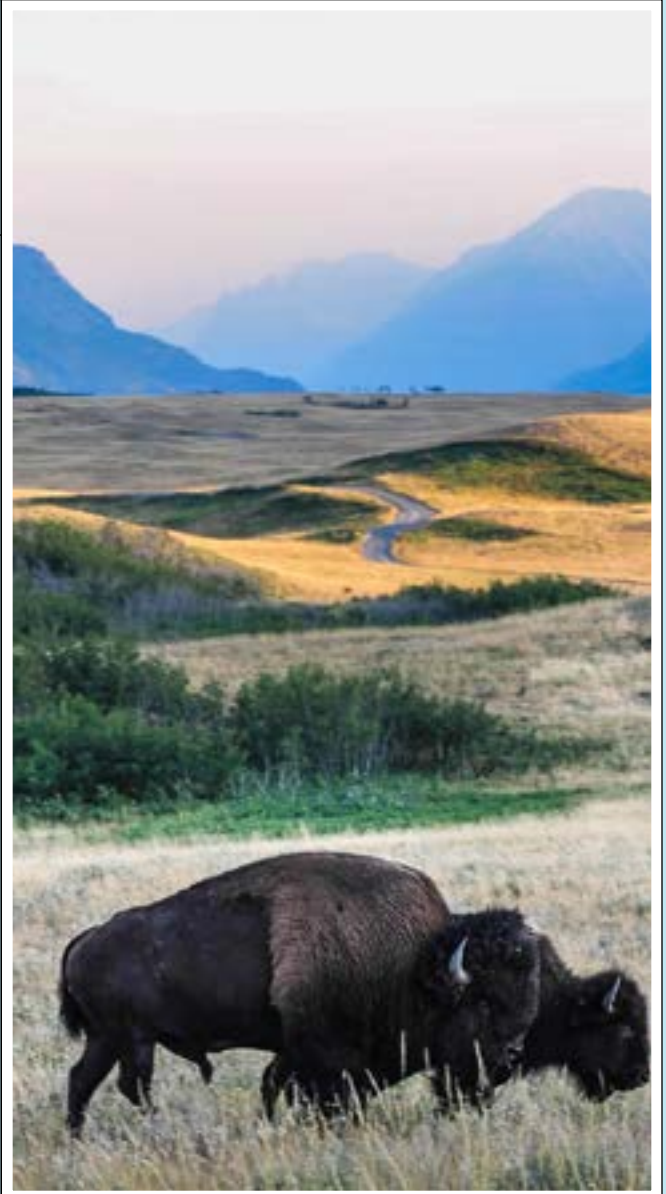


2023

PROGRESS REPORT

TABLE OF CONTENTS

Thank you to our partners	1
Executive summary	2
Progress on key drivers	
Talent	5
Livability	8
Business Environment	13
Innovation	17
Brand	21
External Perceptions	24
Equity, diversity, inclusion and accessibility	27
Truth and Reconciliation	30
The path forward for 2023 and beyond	32
Appendix	34
Data Tables	34
End notes	52



LAND ACKNOWLEDGEMENT

In the spirit of respect, reciprocity and truth, we honour and acknowledge Moh'kinsstis and the traditional Treaty 7 territory and oral practices of the Blackfoot confederacy: Siksika, Kainai, Piikani, as well as the Îyâxe Nakoda and Tsuut'ina nations. We acknowledge that this territory is home to the Métis Nation of Alberta, Region 3 within the historical Northwest Métis homeland. We acknowledge all Nations – Indigenous and non – who live, work and play on this land and who honour and celebrate this territory.

01

THANK YOU TO OUR PARTNERS

Calgary in the New Economy is stewarded by Calgary Economic Development. Our role includes ensuring the strategy is resilient and relevant, now and in the future. We report annually on progress towards the vision and priorities within the strategy while also coordinating and aligning the multiple organizations and groups critical to achieving the vision set out in the strategy.

The strategy outlines five interconnected drivers that provide a holistic view of Calgary’s economy, focusing on indicators that go beyond traditional economic measures and include performance on talent, livability, business environment, innovation, and brand.

This work would not be possible without the help and support of all Calgarians working together to advance the priorities of Calgary’s economic strategy.

This report is compiled with the support of a variety of community sources and resources, including publicly available data as well as data provided by specific community partners. The following community partners have worked directly with Calgary Economic Development to provide valuable insights, metrics, data, and stories to build this report.





02

EXECUTIVE SUMMARY

For Calgary, 2022 was a year brightened by a sense of emergent optimism and renewal after two challenging years of pandemic related disruptions. From the city's pursuit of new talent and innovation to its investments in a nurturing business environment and enhancements to its enviable livability, Calgary looked to the future with enthusiasm and embraced a changing social and economic order. This is a city always striving to bring together bright minds and big ideas with an unmatched spirit to help solve global challenges, and that spirit was on abundant display this past year.

Calgary at the close of 2022 stood as a city well-positioned to adapt to emerging challenges and build on its recent successes. New technology, enhanced learning opportunities and greater diversity matter more than ever and Calgary spent this past year deepening its commitment on these fronts. The city starts 2023 in the enviable position of likely avoiding the recession looming over much of the world—ATB forecasts growth of about three per cent in the coming year¹, the top rate of any province in Canada in 2023. This is a slight decrease from the five-per cent growth rate in 2022, as the province experienced a bustling economic revival driven by high commodity prices and the easing of some of the burdens of the pandemic's toughest years. Calgary's professional and technical sectors enter the new year in a strong position, while relatively affordable housing prices and Calgary's strong reputation as a place to pursue new opportunities should continue to attract newcomers.

There are five drivers of our economy focussed on in *Calgary in the New Economy*.

TALENT

Calgary is a city that nurtures talent. In 2022, that meant Calgary was a city growing in population and diversity. With Canada's highest household net income and declining unemployment, Calgary welcomed more than 10,000 Canadians from the rest of the country. The city's emphasis on attracting the best talent to explore new opportunities and seek future-focused learning was bolstered by the pioneering LearningCITY Summit—the culmination of a four-year, city-wide investment in skills development—and by training programs like Calgary Economic Development's EDGE UP 2.0, which provides training for displaced professionals from the energy sector to transition to tech.



▼ Photo credit: Brookfield

BUSINESS ENVIRONMENT

Calgary is a city where businesses can thrive. In 2022, that included vital new investments in the city's digital infrastructure. A strong business environment in this economy depends on connectivity that is digital in nature and global in reach. Welcome developments included the opening of the TELUS Sky building and TELUS' \$17 billion investment in Alberta's digital networks over the next four years, as well as an initiative to create a space in downtown Calgary to test and provide support for real-world 5G applications.

Equally important were the improvements made at YYC Calgary International Airport, including enhanced road connectivity and WestJet's decision to make the airport its exclusive global connecting hub. And Alberta's Film Friendly tax credit has emerged as a catalyst for big-budget, high-profile film and TV production in the city, bolstered by a pilot project at the City of Calgary to better support the film industry through the development of a one-window access approach for film permitting requests.



LIVABILITY

Calgary is a city that embraces livability. In 2022, that included smart investments like the ones made in affordable housing and the city's transportation system—from a new e-bike sharing system to preliminary work on the Green Line LRT, the largest infrastructure project in the city's history. Calgary also recognizes that future livability is dependent on strong climate action, which is why the unveiling this past year of the *Calgary Climate Strategy: Pathways to 2050*, a long-term investment plan to achieve a resilient, low-carbon future for the city by 2050, was such an important milestone. The city's ongoing investments in livability were lauded in 2022 by the Economist Intelligent Unit, which ranked Calgary the third most livable city in the world, the highest ranking of any Canadian city.



INNOVATION

Calgary is a city that invites innovation. In 2022, that included substantial growth in the city's technology sector, which spans innovation across all industries. Calgary broke records in new venture capital investment for the fifth straight year and was the only major Canadian city to see those investments increase in value from 2021 to 2022, attracting \$647 million across 64 deals. At the epicentre of all this activity is the Opportunity Calgary Investment Fund (OCIF), which provided funding for promising ventures, from fast-growing international tech companies like Mphasis, which opened its new North American delivery centre in Calgary, to exciting homegrown fund managers like Thin Air Labs, which provides a pool of capital and other support services to local founders in the technology and innovation sector. OCIF beneficiary, robotics firm Attabotics, also attracted record-breaking follow-on funding from Export Development Canada (EDC).



◀ Photo credit: Brookfield

BRAND

Calgary is a city building a distinctive brand. In 2022, that included renewed vibrancy as festivals and parades returned to streets and venues across the city, while two pillars of Calgary's cultural scene, the BMO Centre and Arts Commons, continued major renovations and expansions. Calgary's film and TV production industry capped a strong year with a new level of international visibility as HBO's post-apocalyptic thriller *The Last of Us*, the largest production in Canadian history, shot in Calgary.

EQUITY, DIVERSITY, INCLUSION AND ACCESSIBILITY (EDIA) TRUTH AND RECONCILIATION

Calgary is a city making strides to improve Equity, Diversity, Inclusion and Accessibility (EDIA), with a commitment to meaningful action toward Indigenous Reconciliation. In 2022, that included weaving these goals into many of the initiatives driving the city's growth, from the Calgary Foundation's landmark \$1 million investment in the University of Calgary's Indigenous Strategy, helping to attract talent to the city's post-secondary institutions, to the opening of an expanded Centre for Newcomers. Calgary Economic Development and the City of Calgary partnered with the consulting firm MNP to quantify the size of the Indigenous economy in the Treaty 7 Region, including Metis Nation of Alberta Region 3 and urban Indigenous Peoples in Calgary. This study will explore ways to advance economic Reconciliation in the Calgary region. A number of new facilities also opened across the city in 2022 in pursuit of these goals, from Calgary's first accessible outdoor hockey rink to its first Indigenous-themed playground designed to share the knowledge of Indigenous Elders.

These highlights only skim the surface of an eventful year for Calgary. The full report highlights initiatives and projects undertaken by community and business members, including city and government partners at all levels, to advance the priorities within each driver and a look ahead to 2023. Data tables in the appendices provide a complete list of quantitative impacts on Calgary's economy.

03

TALENT

HOME TO BRIGHT MINDS

PRIORITIES

1. Be a welcoming city where everyone can grow their careers.
2. Provide adaptive, future-focused learning opportunities that empower life-long skills development.
3. Attract people who want to make a difference, create solutions and change the world.

Calgary is a city that nurtures talent.

The ability to develop, attract and retain talent of all experience levels, especially in specific high-demand skills, is imperative for long-term prosperity.



Calgary strives to be a welcoming city where everyone can build their careers and in 2022 the city was focused on providing adaptive, future-focused learning opportunities to empower life-long skills development. Calgary is looking to the future, continuing to grow and diversify as it attracts people from a wide range of places and backgrounds who want to make a difference and develop solutions for the city and the world.

Calgary's commitment to welcoming and cultivating talent in 2022 was exemplified by the LearningCITY Summit in November. The Summit was a culmination of a four-year collective project of community engagement, research insights and pilot programs, with initiatives aimed at a range of emerging challenges. From developing a local "talent lab" to in-depth analysis of the reasons young skilled workers move to (and leave) Calgary. LearningCITY's over-arching goal has been to lay the foundations for the city's Skills Development Framework and create an ecosystem to support life-long learning. The initiative is built on four pillars:

- It is *adaptable*, embracing disruption and change as an opportunity;
- It is *accessible*, with justice, equity, diversity, and inclusion embedded in the learning process and championed by all;
- It is *empowered*, generating personalized, purpose-based learning; and
- It is *open*, fostering a spirit that drives performance and innovation.

The Summit, hosted at Platform Innovation Centre on November 25, was a hands-on working session with more than 250 Calgarians from nearly 150 different organizations—including employers, educators, skills developers and policymakers—to share insights on life-long learning. LearningCITY's work is ongoing—its next step will be to create a structure for the collective it has gathered under its banner as it continues to act as a forum for collaboration to work on the Skills Development Framework.

New opportunities to build talent and provide future-focused learning kicked-off in 2022.

Collaborating with all seven of Calgary's major post-secondary institutions, Calgary Economic Development is helping to create a one-stop platform that will support employers to engage post-secondary students in relevant work experiences. The Calgary Work-Integrated Learning pilot, funded by investments

from the federal government's Future Skills Centre (\$2.9 million), the provincial government (\$2.5 million), Prairies Economic Development (\$1.2 million), and Business and Higher Education Roundtable – BHER (\$500,000) will empower employers to involve post-secondary students in their organizations, create talent pipelines, and equip students with job-ready skills. Calgary Economic Development also helped reskill more than 230 Calgarians through EDGE UP 2.0, a program in collaboration with post-secondary institutions and industry partners that helps professionals displaced from the oil-and-gas sector find new roles in Calgary's fast-growing technology sector.

Calgary's post-secondary institutions also introduced new, innovative programming in 2022.

SAIT established the Alberta Bureau of International Education (ABIE), investing \$1.5 million to set up an independent board with representation from post-secondary institutions and key industry collaborators city-wide to boost and diversify international student enrollment and provide more international learning opportunities for Albertans.

The University of Calgary launched Quantum City, a research hub for quantum technologies. The University of Alberta and University of Lethbridge are partners in the hub, which received a \$23 million initial investment from the provincial government. The University of Calgary's School of Architecture Planning and Landscape (SAPL) also introduced a new Bachelor of Design in City Innovation degree, the first of its kind in Western Canada.

Mount Royal University (MRU) and Bow Valley College introduced new programs aimed at diversifying Alberta's economy. At MRU, the Institute for Innovation and Entrepreneurship's Growth Catalyst initiative, a scale-up program to help established Alberta businesses with their growth plans, received \$3.3 million in new funding to support its expansion. MRU also expanded its aviation diploma program. Bow Valley College's Centre for Entertainment Arts launched a diploma program in virtual production and video game development.

These and many other initiatives have begun to close the gap between unmet demand and available supply of talent in Calgary. As the city's efforts to develop, attract and retain talent build on these foundations in the coming years, there are opportunities to better streamline and target programs and initiatives to meet specific needs of emerging sectors.

TALENT IN CALGARY

BY THE NUMBERS

Calgary ranks

1ST

nationwide in household net income.²

Calgary's unemployment rate declined from 9.3 per cent to

4.9%

in 2022 (below the national rate of 5.4 per cent).³

The Calgary metropolitan area's population grew by

3.1%

from July 2021 to July 2022, the fastest rate of any metro area on the prairies and faster than the overall Canadian rate of 2.1 per cent.⁴

The portion of Calgarians identifying as visible minorities has increased by

91.5%

in the last five years, now accounting for 36.4 per cent of the total population of the city.⁵

Momentum's Tech Plus Network and Cloud Technology Training Program (Tech Plus), designed to reduce barriers to employment, had

80%

employment rate in the technology sector.⁶



NOTABLE TALENT-RELATED DEVELOPMENTS



YYC Hacks 2022 Hackathon focused on improving downtown Calgary, working with the City of Calgary.



Calgary's InceptionU and New Idea Machine introduced a new partnership to provide graduates with opportunities to work on real-world software projects.



The STEM Innovation Academy, Calgary's first STEM Charter school expanded to grade 10 and began offering its science, technology and engineering options virtually.



The Calgary Foundation made a \$1 million gift to The University of Calgary's Indigenous Strategy, *ii' taa'poh'to'p*, the largest it has received (for more details, see TRUTH AND RECONCILIATION on p. 30).



Innovate Calgary launched its Black Founders in Tech series with plans to continue into 2023 (for more details, see EDIA on p. 27).

04

LIVABILITY

THE BEST PLACE TO BUILD A LIFE

PRIORITIES

1. Build a city with a net zero economy.
2. Create a city where everyone is welcome, safe and able to build a meaningful life.
3. Build vibrant, healthy and accessible communities.
4. Be known as an inviting city with year-round experiences for everyone to enjoy.

Calgary is the most livable city in North America.

Being a livable city helps attract and retain companies, people and investments. This means focusing on key aspects of livability defined by international organizations which include resiliency, clean energy, environmental quality, affordability, transportation, safety, outdoor and public spaces, and attractions.



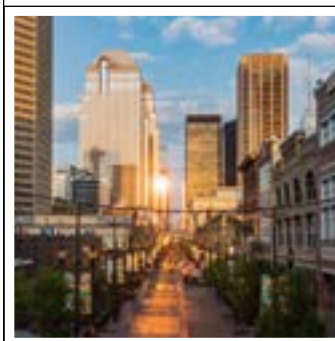
Calgary is constantly evolving to become a better place to live, building vibrant, healthy and accessible communities where everyone is safe and welcome to build a meaningful life. In 2022, Calgary made strides to address the twenty-first century reality that living well means living sustainably and acting urgently on climate change; resting on the foundations of a net-zero economy and climate resilient community.

The cornerstone of the city's livable future is the *Calgary Climate Strategy: Pathways to 2050*, approved by City Council in 2022. The strategy outlines a vision of a resilient city whose decisions are guided by long-term goals of economic, social and climate resilience putting Calgary on the path to net-zero greenhouse gas emissions by 2050. This includes a multi-million-dollar climate implementation plan for the next four years that balances the synergies between climate mitigation and adaptation to accelerate action on improving energy use and efficiency, reducing climate risk and working towards net-zero GHG emissions.

This commitment to net-zero also involves robust support for both the city's own efforts to reduce its emissions and for its burgeoning clean technology sector, which is helping to develop the tools to reach these goals both at home and around the world.

The federal government invested more than \$3 million in the clean technology sector in Alberta this past year, with two-thirds of the funding going to establish the Energy Transition Centre at the Ampersand in downtown Calgary. The centre will support small and medium-sized businesses developing clean energy technology. The University of Calgary and CIBC unveiled a multi-year partnership to contribute to the centre's activities. The remainder of the federal funding went to the Foresight Clean Technology Accelerator to support training and investment efforts. The City of Calgary's Clean Energy Improvement Program, low-interest loans of up to \$50,000 for home-efficiency retrofits, also received federal funding in 2022. These loans are being applied to improvements such as high efficiency furnaces, solar hot water systems, rooftop solar systems and better insulation.

The University of Calgary's new Energy Modeling Hub (a joint project with the Institute de l'énergie Trottier at Polytechnique Montreal and the Institute for Integrated Energy Systems at the University of Victoria) was another major addition to the city's clean energy landscape in 2022. Driven by a \$5 million investment from the federal government, the four-year project brings together policymakers, energy modelers and other experts from across the country to help guide the major transformation of current energy systems that is crucial to the



PrairiesCan's Canada Community Revitalization Fund invested

\$6.6 MILLION

in 17 community-focused projects across Calgary in 2022, including upgrades to Stephen Avenue, improvements to the Contemporary Calgary community auditorium, and an Indigenous Elders' community centre.



NOTABLE LIVABILITY-RELATED DEVELOPMENTS

The Beltline Urban Mural Project (BUMP) hosted its annual mural festival in August, welcoming artists from across the city and around the world and adding

70 MURALS

in 11 Calgary communities.

*Photo credit: @dakidt_usoment
BUMP Festival*



The Alcove Centre for the Arts hosted several pop-up events, including its Hip-Hop Showcase, to highlight the benefits of a physical recreational facility for the arts.



Pro basketball arrived in the city last year with the arrival of the Canadian Elite Basketball League's Calgary Surge, who will begin league play in 2023.

creation of a low-carbon economy. Further supporting transformation of energy systems, the Transition Accelerator for the Calgary Region Hydrogen Task Force launched a study to assess the potential for the Calgary region to participate in the emerging fuel hydrogen economy. The energy-rich gas can be produced with low greenhouse gas emissions for use in heavy-duty transportation, as well as heat and power generation.

This past year was also a time of strong growth for Calgary's homegrown clean technology sector, which continues to expand rapidly to meet the urgent pace of climate change. (Full details on the sector's rising stars last year can be found in INNOVATION, p. 17).

Calgary's commitment to creating vibrant, healthy communities as building blocks of a city where everyone is safe and welcome deepened in 2022 on several important fronts.

Numerous initiatives in 2022 brought new life and purpose to downtown Calgary. The Downtown Calgary Development Incentive Program unveiled the first five office-to-residential conversions of office towers, repurposing approximately 665,000 sq. ft. of office space in the downtown core into more than 700 homes. The City of Calgary and the University of Calgary began a collaboration to transform underused

public and private space downtown, including a new pedestrian community space on Fourth Ave. S.W., along with research into options for vacant spaces in the core that are not viable for conversion to residential. The Dorian also opened its doors this past year in Downtown Calgary with more than 300 rooms and three restaurants on 27 stories.

The availability of affordable housing remains a critical need in Calgary. In 2022, the City of Calgary began an affordable housing office conversion downtown in partnership with HomeSpace Calgary and Inn from the Cold. The federal government, the City of Calgary, Brookfield Residential and the HomeSpace Society also invested a combined \$13 million to address this need, beginning construction on 45 new affordable homes in southwest Calgary. Furthermore, the province established a task force to focus on addictions and houselessness in the city.

Calgary's transportation network—a crucial factor in both the city's livability and its efforts to cut greenhouse gas emissions—received important new investments. An important milestone was reached for the new Green Line LRT, a major expansion of Calgary's transit system and the largest infrastructure project in the city's history. The City has issued a Request for Proposals to design and build the Green Line's first phase, from Shepard to Eau Claire. Preliminary



Interactive apps to engage users in conversations around Indigenous art and history (indigiTRAILS) and people with disabilities (Pedesting) debuted in 2022 (for more details, see TRUTH AND RECONCILIATION, p. 30, and EDIA, p. 27, respectively).



Calgary's Baker Park was recognized as the fifth most popular disc golf course in the world in 2022, the only Canadian course in the top ten.

◀ Photo credit: Roth & Ramberg



site planning work has begun along the route. The 18-kilometer addition to the CTrain network will create almost 20,000 jobs during its construction and generate \$2.2 billion in long-term city-shaping benefits, while serving as a catalyst for smart city growth. Mobility sharing networks Neuron and Bird added dockless e-bikes to their established e-scooter fleets last summer. Calgary Transit also introduced its new TD Free Fare Zone in downtown Calgary at the end of 2022—a helpful addition to the system's non-fare revenue.

In a big boost for the city's vibrancy and efforts to be an inviting city with year-round experiences for everyone to enjoy, Calgary's arts and cultural institutions and organizations saw significant new activity in 2022. City-wide, beloved festivals and parades returned, including the Calgary Stampede, the Lilac Festival, Calgary Folk Music Festival, Beakerhead and the Nagar Kirtan. This past year also saw an expanded second instalment of Chinook Blast, attracting more than 400,000 attendees for indoor and outdoor arts, culture and sports experiences, creating \$8.2 million in economic impact.

Aside from local festivals, tourism was a significant driver of economic activity in Calgary, attracting more than 60 major events that together generated \$119 million in economic impact, including Red Bull Outliers,

Volleyball Nations League, the Shaw Charity Classic, the Canadian Country Music Association's Off Country Music Festival and Breakout West. Meetings and conventions were another driver of economic activity with Tourism Calgary and its partners welcoming 58 meetings and conventions that delivered \$37 million in economic impact overall.

Calgary Arts Development (CADA) embarked on a robust recovery from the severe impact of the pandemic in 2022, investing more than \$13 million in the city's organizations, individual artists and arts and culture organizations. CADA is working with The City and other civic partners on implementing the Winter City and Eventful City strategies and worked closely with its community working group on hiring, equity and conflict resolution issues and on the Calgary Board of Education's Fine Arts Advisory Council.

Calgary is a great place to live, and it only grew more livable in 2022 as it welcomed thousands of new residents drawn to its enviable quality of life. With current trends—local, national and global—in economics, housing and employment, the city will need to make affordability a priority. With unsustainable increases to cost of living and the impending housing supply challenges, if not addressed, the city could see families and businesses pushed out, as has happened in other cities across the continent.

LIVABILITY IN CALGARY

BY THE NUMBERS

Calgary ranked

3RD IN 2022

on the Economist Intelligence Unit's annual list of the world's most livable cities—Calgary's highest ranking ever and the highest ranking of any North American city.⁷

Calgary's downtown population growth rate ranked

4TH HIGHEST

among Canadian cities for the five years ended at the start of 2022.⁸

The number of trips made by Calgarians within the city using walking or cycling increased by

2% IN 2022,

indicating increased usage of bike lanes and pathways to commute.⁹

A survey found

72%

of Calgarians were satisfied or very satisfied with Calgary Transit a decrease from 84 per cent in 2021.¹⁰

Calgary ranked

30TH

worldwide on the Kisi work-life balance index for 2022 (down from 13th globally in 2021, though Calgary's overall score increased by four per cent).¹¹

Calgary welcomed more than

6 MILLION

visitors, and broke hotel occupancy records for four months.¹²



49,754 net new migrants (intraprovincial, interprovincial and international) came to Calgary in 2022, an increase of

OVER 400%

the largest single increase in Calgary population due to net migration in over two decades.¹³

10,916

people from elsewhere in Canada relocated to Calgary in 2022.¹⁴



CALGARY
FOUNDATION
FOR COMMUNITY, FOREVER

2022 QUALITY OF LIFE REPORT
FINDINGS

64%

of Calgarians said they were happy with their quality of life and 80 per cent reported a healthy sense of belonging.

73%

of Calgarians said they were concerned with safety in the city (an increase from 65 per cent in 2021).

05

BUSINESS ENVIRONMENT

TOP LOCATION FOR BUSINESS

PRIORITIES

1. Build a globally and digitally connected city.
2. Be a place where businesses are encouraged to test and use technology and data to start, grow and thrive.
3. Champion efficient and effective policies supporting business practices.

Calgary is a city where businesses can thrive.

This driver not only focuses on creating a low tax environment, but also on making development and building permit processes, business license applications, and other regulations and requirements easier to navigate. As digitalization becomes increasingly prevalent, physical and digital infrastructure and connectivity is a key component of doing business in Calgary. This includes innovation through policy and regulations on data sharing, testing facilities and pilot programs, and 5G infrastructure.





▲ Photo credit: Calgary Airport Authority



The City of Calgary launched its V.I.P. (Vendors in Parks) program, a pilot pop-up initiative designed to help support local businesses by creating tent space in four city parks to sell products and services.

▼ Photo credit: Calgary Municipal Land Corporation



Calgary strives to nurture a collaborative spirit in its business community, creating a place where businesses are encouraged to test new technologies, start new companies, grow and thrive.

The foundation of Calgary's business environment is a globally and digitally connected city. In 2022, substantial new investments and improvements at YYC Calgary International Airport by the Calgary Airport Authority and the city's expanding aviation sector contributed to this goal. YYC Calgary International Airport has recovered from its pandemic slowdown faster than any other airport in Canada and improved its connectivity last year through the completion of the Airport Trail Interchanges project, a Partner Parking program with nearby businesses, and a multiyear agreement with Uber. Ground transportation to and from the airport increased significantly in 2022 from 2021.

YYC Calgary International Airport also became WestJet's exclusive global connecting hub in 2022, as part of WestJet Group's establishment of its permanent home base in Calgary. The city's aviation sector expanded further last year when De Havilland, a major aircraft manufacturer, announced construction of a new manufacturing complex in the Calgary region, which will employ 1,500 people and house the company's Canadian headquarters once completed.

The downtown Calgary skyline welcomed a soaring symbol of the city's global connectivity with the opening of TELUS Sky, one of North America's most technologically innovative and environmentally friendly skyscrapers. This new Calgary headquarters for TELUS opened the same week the telecom company announced a \$430 million investment in Calgary, part of its \$17 billion investment in the province through 2026 to create more than 8,500 jobs, connect more residents to the internet and deliver 5G to remote communities.

TELUS' efforts reflect the findings of a 2021 Calgary Economic Development study indicating that Calgary is well-positioned to become a centre for 5G development and applications. To that end, a collaboration with a Wireless Service Provider and the City of Calgary has begun work to build a 5G space in the city—a "digital playground" for testing and piloting

5G-enabled applications. Calgary is one of only two Canadian cities engaged in this kind of next-generation digital development to date.

The City of Calgary's Living Labs program expanded its policy-driven support for Calgary's business environment in 2022. The Living Labs offer the City's physical, digital and data assets for companies and researchers to test ideas and products in a real-life environment. This past year, Living Labs helped Canadian companies AirMatrix and IN-FLIGHT Data with their experimental use of drones for urban data gathering—the first tests of this kind anywhere. Requests for piloting new technologies continue to grow year to year—more than 150 requests were received in 2022, up from 50 in 2021—an indication that Calgary's reputation as a Living Lab is growing.

The Calgary TELUS Convention Centre, the centrepiece of the city's business conference scene, also made strides in 2022 to improve Calgary's business environment after two years of pandemic restrictions, hosting 163 total events and nearly 120,000 delegates. The convention centre embarked on a major rebranding initiative to adjust to evolutions in business culture since the pandemic, while becoming a Rainbow Registered venue, a national accreditation for LGBTQIA2S+ -friendly businesses and organizations, and a certified Living Wage Employer.

International businesses were drawn to making major investments in a range of business sectors this past year. TD Bank established its western Canada wealth hub in the city, aiming to employ 100 financial planning associates working out of TD Calgary Place, and Calgary has also been chosen as homebase for EY's first Finance Centre of Excellence in Canada. Infosys, meanwhile, chose Calgary for a new digital centre with 1,000 jobs expected, and IBM expanded its Calgary presence with an innovation centre focused on energy transformation technologies. Sidetrade, a global IT firm, opened its North American headquarters in Calgary with a \$24 million investment, creating approximately 110 new jobs in the city. Alumni from Calgary Economic Development's Trade Accelerator Program secured 38 trade deals and international partnerships in 2022.

Calgary's business environment is nurtured by efficient and effective policies supporting business practices, exemplified in 2022 by the combined efforts of the



provincial government's Film Friendly tax credit program and the City of Calgary's policies on several fronts to draw more film and TV productions to the region. Local film and TV productions created \$461 million in total revenue in 2022, and increasing demand for permits and other services is expected to continue in the coming years. The City's Film Friendly program included collaborations this past year with subject matter experts in cities across Canada to document best practices that will act as the groundwork to set up a film-specific team internally in 2023.

To further support local business practices, The City of Calgary's Benefit Driven Procurement Task Force, which includes representatives from local government, the private sector, community organizations (such as Momentum), and social procurement experts, is working to create greater community value from public procurement. Benefits include apprenticeships, the creation of inclusive employment opportunities for equity deserving communities and support for employers to implement their own Social Procurement and Living Wage policies.

All the trends are pointing in encouraging directions for Calgary's business environment. The city is an emerging hub for innovative living labs, 5G connectivity is being expanded, investments are strong, and influential decision-makers are setting up head offices in the city. Continuing to build on this enviable momentum should be a top priority going forward.

BUSINESS ENVIRONMENT IN CALGARY

BY THE NUMBERS

Ground traffic to and from YYC Calgary International Airport increased substantially in 2022, with parking transactions up by

118%

from 2021 taxi trips up by 185 per cent, sedan trips up by 170 per cent and rental car transactions up by 113 per cent.¹⁵

Calgary ranked

1ST

among Canadian cities in the concentration of head offices per capita and has the second highest total number of head offices.¹⁶

Downtown office vacancy rates in Calgary decreased to

32.6%

in 2022 the strongest decline since 2014.¹⁷

Overall vacancy rates in Calgary's industrial real estate market decreased by

1.2%

continuing a steady decline since the beginning of the pandemic in 2020.¹⁸

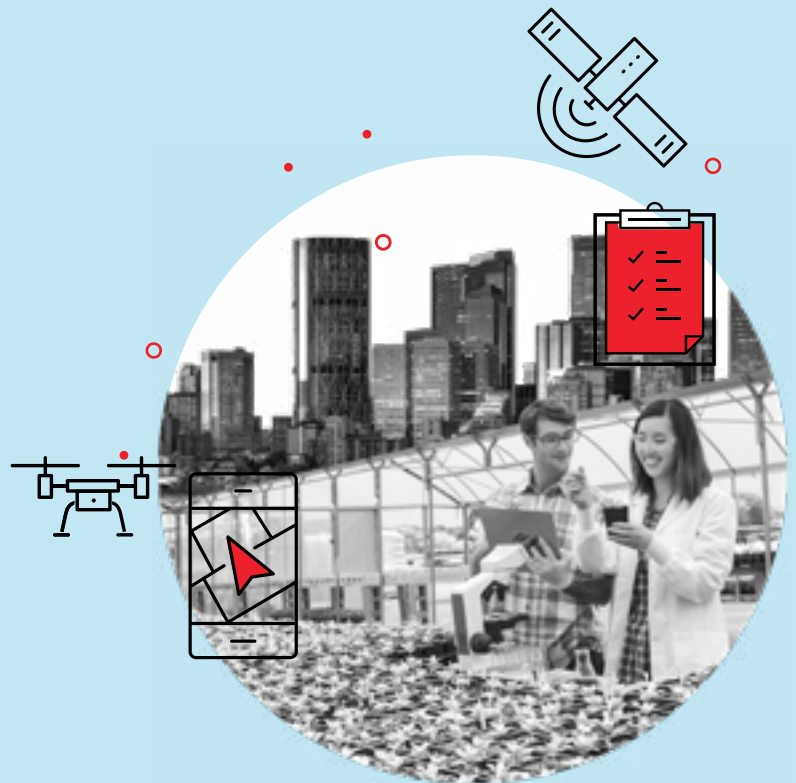
NOTABLE BUSINESS ENVIRONMENT -RELATED DEVELOPMENTS



For the third year in a row, the City of Calgary waived fees for patio permits as a way to support local businesses in their recovery from the pandemic. About 100 businesses included seasonal roadway and sidewalk patios to their operations in 2022.



The City of Calgary launched its Digital Service Squad, a pilot initiative to support small businesses to establish themselves online, digitalize and monetize for free, employing a team of 14 post-secondary students who provide one-on-one support to eligible small businesses to adopt new technologies.



06

INNOVATION

A CREATIVE HUB

PRIORITIES

1. Build an environment where Calgary companies can accelerate and scale to compete globally.
2. Be a magnet for innovative and creative thinkers by investing in development and attraction opportunities.
3. Accelerate real-world application of research and development through corporate investment and Post-Secondary Institution (PSI) collaboration.

Calgary is a city that invites and fosters innovation.

As a city of innovators with a long history of serving large industrial sectors, Calgary is perfectly positioned to take advantage of the opportunities arising from the growing community of visionaries.

In 2022, Calgary continued to build an environment where local companies can scale to global heights and serve as a magnet for innovative thinkers. By weaving innovation into every facet of life and business, Calgary is becoming a creative destination for all.



NOTABLE INNOVATION-RELATED DEVELOPMENTS



There are **1,027** reported local tech companies in the Calgary ecosystem, with almost 600 that have five or more employees.¹⁹



KPMG opened its KPMG Ignition Calgary at the Platform Innovation Centre, creating a dedicated innovation lab to help clients solve their most complex problems.



PrairiesCan provided funding for new training programs for women investors and immigrant women’s entrepreneurship (for more details see EDIA, p. 27).

Platform Calgary welcomed the

100TH

organization to their partner community, a boost in pursuit of the community’s long-term goal of tripling the size of Calgary’s tech sector in the next 10 years.



In 2022, Calgary continued to build an environment where local

companies can scale to global heights and serve as a magnet for innovative thinkers. By weaving innovation into every facet of life and business, Calgary is becoming a creative destination for all.

A number of Calgary’s innovation success stories this past year have emerged from the Opportunity Calgary Investment Fund (OCIF), a powerful catalyst for innovation in the city, with investments to support economic diversification, talent development, and innovation ecosystem growth. Since 2018, OCIF has allocated more than \$76.5 million in 25 projects to date, which has spurred investments between \$458 million and \$856 million. The fund made five funding announcements in 2022, including an investment in Mphasis, an international tech firm and partner in the University of Calgary’s Quantum City project, to accelerate the attraction of intermediate and senior-level talent to Calgary over the next four years. Additionally, OCIF invested up to \$500,000 in the Avatar Innovations’ Accelerator program to support the creation of at least 12 Calgary startups driving the energy transition.

Previous OCIF recipients also saw major breakthroughs in 2022. The robotics firm Attabotics wrapped up

one of the most successful fundraising rounds by a technology company in Alberta, attracting US\$71.7 million in new investment. Neo Financial, a tech-focused financial services company, received a \$1 billion unicorn stock market valuation in May, making it the fifth unicorn in Calgary in the last two and a half years. The company was supported by venture builder studio Harvest Builders, an OCIF funding recipient, and now employs more than 650 people in Calgary and Winnipeg and occupies 110,000 sq. ft. of office space in two downtown Calgary buildings. AltaML received funding for their AI lab in 2021, placed 18th on Globe and Mail’s ranking of Canada’s Top Growing Companies in 2022, and experienced 2309 per cent growth in the past three years.

To support continued growth and prosperity through innovation, Calgary Economic Development and OCIF, in partnership with Platform Calgary and the City of Calgary, launched a scoping study exploring the concept of a downtown innovation district. This work continues into 2023 and will inform next steps in realizing Calgary’s very own Innovation District.

Overall, Calgary’s tech sector continued to grow in 2022. Innovative companies attracted funding to scale globally and accelerate the real-world application of their research and development through corporate investment and collaboration with post-secondary

The UFA Co-operative Ltd. invested

\$600,000

over four years to the Simpson Centre at the University of Calgary to support research and outreach on food security and sustainability.



HempAlta opened a

13,000 SQ. FT.

production plant in Calgary, processing hemp in three different streams for different applications in the fast-growing industrial hemp business.

Virtual Gurus, a digital platform helping create job opportunities in equity-deserving communities, secured an

\$8.4 MILLION

investment through TELUS Pollinator Fund for Good (for more details see EDIA, p. 27).

institutions. Innovate Calgary, meanwhile, received a \$2.65 million investment from PrairiesCan to establish and operate a Social Innovation Hub in Calgary, providing a space for community members to collaborate on solutions to complex social challenges. Alberta's Social Enterprise Fund, which provides patient capital to social enterprises, made a \$500,000 investment in the Calgary company Earthware Reusables Inc., a startup discovered at the 2021 Social Venture Institute event.

Platform Calgary continues to receive more than 200 applications annually for its Startup Visa program, supporting international growth-stage start-ups to scale in North America. The construction management software firm Tracecost emerged from SAIT's Applied Product Management Bootcamp to secure \$2.5 million in new funding. Calgary-grown financial services firm Symend raised \$56 million in new investments, continuing its growth and placing seventh on Deloitte's Technology Fast 50 ranking of Canadian tech companies.

The substantial activity this past year in Calgary's clean technology sector was encouraging, with new developments in a wide range of technologies and fuels as the city strives to become a hub for business in the global energy transition. Carbon Upcycling Technologies and Eavor Technologies are two Calgary-based cleantech companies that appeared in the

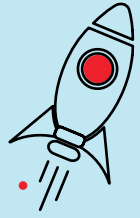
2023 Global Cleantech 100 list. Eavor Technologies, a geothermal energy, partnered with Deep Energy Capital to develop five projects in Europe worth up to €1 billion using its ground-breaking closed-loop geothermal technology. Carbon Upcycling Technologies, which turns carbon dioxide emissions into products, won its first European contract for £2.3 million to test a new cement additive. Additionally, 15 local companies made it on the Foresight 50 list, which recognizes Canada's most investable cleantech companies.

Other notable highlights include the collaboration between renewable energy firm H-Gen Initiatives and its Indigenous partner Apeiron Resources to build the Calgary Hydrogen Production Hub—the first hydrogen refueling station in Calgary and a training centre to instruct Indigenous workers in hydrogen production, storage, distribution and transportation. The Calgary-based biofuel company SixRing received a \$1.4 million grant from the federal government to scale up production in low-carbon fuel generated from crop and forestry waste.

Calgary has remained a magnet for innovation through tough years for the economy, and trends point to continued success in the years to come. The city is attracting record-breaking venture capital and smart public investments which organically generates new companies and innovations in our community.

INNOVATION IN CALGARY

BY THE NUMBERS



Venture capital investment in Alberta broke records for the

5TH

straight year.²⁰

Calgary was the only major Canadian city to see more investment in 2022 than in 2021 and ranked

4TH

among Canadian cities in total funding with \$647 million invested in 64 deals (up from \$500 million in 2021).²¹

Venture capital investment in Calgary accounted for

88%

of all funding and 89 per cent of all deals for Alberta as a whole.²²

Calgary ranked

1ST

in LinkedIn's 2022 survey of North American cities with the fastest growth of tech talent in North America in the past year.²³

Calgary ranked

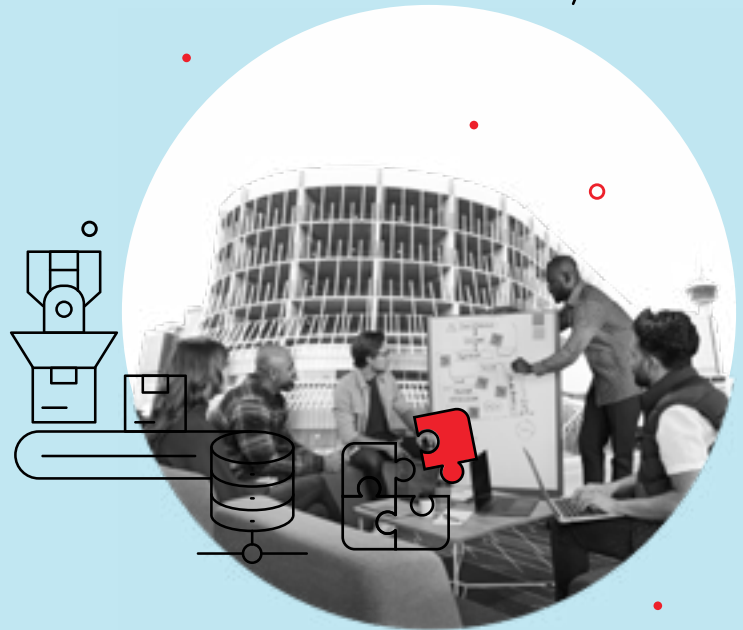
3RD

in the top 10 tech markets to watch in CBRE's Tech-30 survey for 2022²⁴

Calgary ranked

28TH

out of North America's top 50 markets in CBRE's 2022 Scoring Tech Talent report, with a 22 per cent expansion in tech talent over the past five years and more than 40,000 jobs in the sector overall.²⁵



Corporate research and development (R&D) spending

INCREASED

in 2021 (the most recent year for which data is available), with spending from the 11 companies with Calgary-based headquarters at \$1,269,680.²⁶

The University of Calgary ranked

IN THE TOP FIVE

in ReSearch Infosource Inc.'s ranking of Canada's Top 50 Research Universities for the first time.

The University of Calgary ranked

1ST

for generating start-up companies among 32 academic and non-profit research institutions in the Association of University Technology Managers' Canadian Licensing Activity Survey for 2021.

07

BRAND

AN ICONIC CITY

PRIORITIES

1. Demonstrate Calgary is a vibrant and inclusive community with a global perspective.
2. Tell a unified story to strengthen consistent and competitive identity here and everywhere.
3. Share Calgary's story as an ambitious city full of energy, optimism and opportunity.

Calgary is a city building an iconic brand.

A city's brand is its unique identity. It should embody the collective and shared values of the people that call that city home. Brand ultimately defines the experiences it offers the various audiences it interacts with: residents, visitors, businesses and more, while also informing perceptions that impact decision making by those audiences. As a unique storytelling platform that shapes perceptions locally and abroad, a city's brand is the underpinning of its distinct promise, purpose and persona and should accurately and authentically represent its people.



The city's brand aims to tell a unified story locally and abroad about Calgary's unique identity as a city of opportunity that is creative and inclusive.

Economic and political shifts compounded by a global pandemic brought significant change to Calgary's communities and businesses. This resulted in the need to assess how Calgary's brand resonates with audiences here and abroad as we work towards strengthening Calgary's competitive identity locally, regionally and internationally.

Following community engagement and research last year, Calgary Economic Development worked with Tourism Calgary and the City of Calgary to evolve the brand story and tested it with the broader community to ensure it was resonating. The team are now taking the updated narrative and what they heard from testing and refining the brand to be more relevant for all Calgarians. An agency, selected through a request for proposal last fall, is supporting on this refinement and a creative expression of the brand.

With diversity being a key tenant of the brand, equity-deserving communities including youth, ethnic minorities, and LGBTQIA2S+ will be included in the engagement plan alongside representatives from the local arts, sports, not-for-profit, newcomer, tech, business, tourism and post-secondary communities.

The vision is for shared ownership of the Calgary brand; one that is embraced, celebrated and integrated into our community's storytelling.

In 2022, Calgary emerged from the challenges of the pandemic years with renewed self-confidence in its ability to embrace the future with optimism, as several breakthroughs for the city's visibility on the global stage strengthened its brand.

Ironically, the most prominent statement of Calgary's brand in 2022 was its star turn as a post-apocalyptic landscape. The HBO series *The Last of Us*, set in a collapsed America after a fungal infection decimated the planet's population, wrapped production in June of last year and became an immediate global hit upon its release in early 2023. The production was one of the largest ever in Canada, signalling a major step forward for Calgary's film and TV industry.

The Last of Us capped a record-setting year for film and TV production, with the overall volume of

production budgets in Calgary in 2021 exceeding \$500 million in total production spending – more than double the previous year – and \$461 million in 2022. The City of Calgary also sent a delegation, led by Mayor Jyoti Gondek, to Los Angeles to meet with film and television industry executives and reinforce the message that Calgary is the ideal location to host global productions of any size and scale. The city's film and TV industry continues to grow thanks to competitive incentives, streamlined business processes and expanding production facilities, which in turn are attracting more jobs and investment to the industry. The landmark, big-budget production of *The Last of Us* builds on the recent success of other hit films and TV shows produced in the Calgary area, including *Under the Banner of Heaven*, *Ghostbusters: Afterlife*, *Wyonna Earp* and several seasons of the *Fargo* TV series.

Calgary's unique brand was also on display at home in 2022, reinforcing its reputation as a vibrant and inclusive community with a global perspective. This past year saw continued progress on major renovations to two of the city's most important cultural venues: the BMO Centre and Arts Commons. The expansion of the BMO Centre is expected to be complete before the 2024 Stampede and will serve as western Canada's largest convention centre, and as an anchor for Calgary's emerging Culture and Entertainment District with retail outlets, restaurants, plazas and other amenities. Phase 1 of the Arts Commons Transformation Project is a \$270 million capital project that will add 173,000 square feet to the facility, including a new 1,000 seat theatre.

The vibrancy of the city centre was further enhanced in 2022 by the return of the Global Energy Show after a two-year pandemic absence. The show – formerly the Global Petroleum Show – attracted 30,000 visitors from around the world and showcased clean energy across 60 per cent of the exhibition's floor space, demonstrating the city's and the world's keen interest in diversifying the energy industry.

Efforts like these to enhance the city's fabric continue to add to Calgary's iconic brand. This is vital for attracting, retaining, and developing talent, people, and businesses in a growing economy. It's critical to build on the work done in 2022 to continue to improve public perceptions of the city and broadcast a unified story about Calgary far and wide.

BRAND IN CALGARY

BY THE NUMBERS

The City of Calgary subsidized

90 EVENTS

across the city in 2022, including a wide range of global celebrations and festivals.²⁷



Demand for restaurants and other food and drink establishments have bounced back to

EXCEED

pre-pandemic levels in Calgary based on Statistics Canada's survey of food services and drinking places.²⁸



Traffic levels reached

80%

of their pre-pandemic levels within two months of offices re-opening in 2022.²⁹

Calgary Economic Development received 2,609 media mentions in 2022, an increase of

38% FROM 2021

99% of media mentions were positive or neutral in tone.³⁰



A refined content strategy and a focus on audience engagement led to a significant increase in social media engagements across Calgary Economic Development's social media channels with a total of

193,611

engagements from 3,593 posts.³¹



In Calgary Economic Development's 2022 External Perceptions survey of talent and business leaders in key national and international markets:

**FINDINGS FROM CALGARY ECONOMIC DEVELOPMENT'S
EXTERNAL PERCEPTIONS RESEARCH**



61%
TALENT

75%
BUSINESS LEADERS

See Calgary as a diverse and inclusive city

60%
TALENT

78%
BUSINESS LEADERS

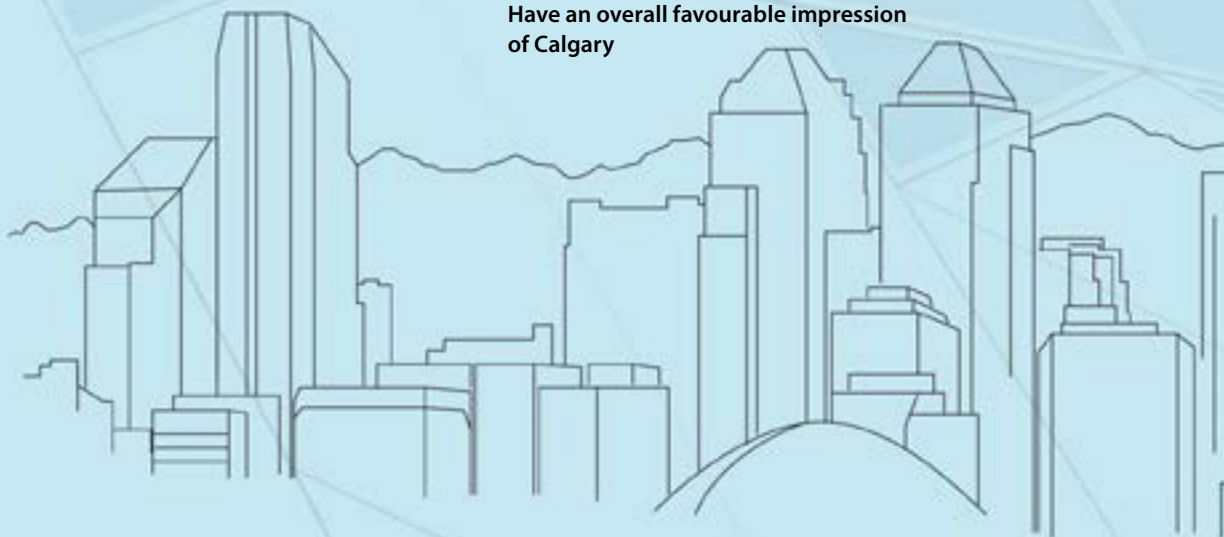
See Calgary as an inclusive place where different people, ideas and cultures come together



72%
TALENT

90%
BUSINESS LEADERS

Have an overall favourable impression of Calgary



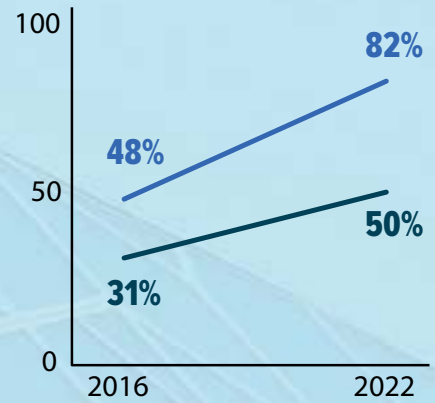
51%

of talent agree that Calgary has a diverse economy



KNOWLEDGE OF CALGARY

has grown from 48 per cent of business leaders in 2016 to 82 per cent in 2022 and from 31 per cent of talent in 2016 to 50 per cent in 2022.



TALENT

57%

Agree that there is a wide variety of career options in Calgary beyond the energy industry

58%

Believe Calgary is a place where they can build a career

BUSINESS LEADERS

74%

See Calgary as a new hub for tech and innovation

76%

Agree that Calgary has a diverse economy







08

EQUITY, DIVERSITY, INCLUSION AND ACCESSIBILITY

Calgary is a city that is constantly improving its Equity, Diversity, Inclusion and Accessibility (EDIA).

Efforts to enhance EDIA in 2022 were integrated into every aspect of the city's economic and social fabric — helping to attract talent, improve livability, generate innovation, enhance the city's business environment and build its brand. Calgary's commitment to building a city that is welcoming, safe and extends opportunities to all is a top priority and ran as an undercurrent through the city's success stories this past year.

Calgary's inclusive spirit was on prominent display in 2022 as the city welcomed new arrivals from around the world as never before. These efforts began at YYC Calgary International Airport—the city's gateway to the world—which opened a new Immigrant Arrivals Centre this last year, the first of its kind in a Canadian airport terminal. The centre provides various support services from eight organizations in the city: ActionDignity, the Calgary Bridge Foundation for Youth, Calgary Immigrant Women's Association, the Centre for Newcomers, Immigrant Services Calgary, La Cite des Rocheuses, Portail De L'Immigrant Association and The Immigration Education Society.

Calgary's Centre for Newcomers celebrated the official opening of its new 53,000-sq.-ft. facility in the northeast community of Marlborough. The new centre is significantly larger than its previous location and features a 200-seat auditorium and a storefront café run by newcomers, as well as childcare facilities, a spiritual space and a youth centre. The Centre for Newcomers also hosted a job fair for new arrivals from Ukraine in partnership with St. Vladimir's Ukrainian Orthodox Sobor.

A number of more inclusive and more accessible recreational and cultural facilities opened across the city in 2022. The Parkdale Community Association, working with the accessibility consultant Level Playing Field, opened Alberta's first accessible outdoor community rink, with the needs of seniors, persons with disabilities and sledge hockey players in mind. The rink includes wider bench doors, transparent boards for spectators, and fully accessible washrooms, locker rooms and spaces for players to transfer from wheelchairs to sledges.

WinSport received a \$17.4 million investment from the federal government to update its day lodge, improving accessibility and removing barriers to access for athletes of all abilities, as well as upgrading to net-zero standards. Calgary won its bid to host Special Olympics Canada Winter Games in 2024, which is expected to draw 1,300 participants, along with officials, guests, family and friends, generating more than \$9 million in local economic activity. Additionally, a groundbreaking ceremony took place for the Brawn Family Foundation Rotary Park, adjacent to the new Calgary Centre for Child and Adolescent Mental Health (under construction). The park is designed to support youth mental health and wellbeing, with features such as a meditation labyrinth, a sensory garden, walking pathways, and other spaces for quiet reflection. Meanwhile, a local app, Pedesting, was designed to help users navigate Calgary in wheelchairs. The app will use data collected during its 2022 test phase to assist Calgary in becoming a more accessible city.

Calgary's business community made significant investments in diversity and inclusion this past year as well. The TELUS Pollinator Fund for Good invested \$8.4 million in Virtual Gurus, a platform that matches skilled virtual assistants with organizations that need their support and largely employs people from equity deserving communities –BIPOC people, people from the LGBTQIA2S+ community, single and stay-at-home parents and those with alternate abilities. Virtual

Gurus also received funding from Raven Indigenous Capital Partners, The51 and the Accelerate Fund, allowing the organization to expand into markets in the United States.

Innovate Calgary launched its Black Founders in Tech series this past November, a pitch competition pairing founders with mentors and coaches to help prepare their presentations. There is also a BIPOC founders' event in the works for 2023. PrairiesCan, meanwhile, made significant investments in Movement 51 – which provides financial literacy workshops and coaching to 550 women investors across the prairies – and in a new business incubator program for immigrant women through the Calgary Immigrant Women's Association. The51 and Alberta Innovates held its annual HerStory pitch competition in Banff this past year, attracting 29 female and gender-diverse entrepreneurs from across the country.

The summer of 2022 also saw the opening of a pop-up collaboration between the Calgary Design Clinic and the University of Calgary's Faculty of Social Work Anti-Black Racism Task Force and School of Architecture Planning and Landscape. This program highlights the intersection of race and space, with the aim of dismantling and transforming oppressive spaces that historically exclude or minimize the contributions of the Black people. The pop-up also included a youth leadership program and a showcase space for the work of Black communities, local leaders, musicians and artists.

The many efforts to advance EDIA goals in Calgary this past year were admirable, but the Calgary Foundation's 2022 Quality of Life Report clearly indicates that there is still a lot of work to be done on this front. At present, only 57 per cent of Calgarians – a little more than half – report that they are committed to anti-racism, diversity, equity and inclusion. And while 73 per cent of Calgarians believe it is important to learn about shared history from an Indigenous perspective and 73 per cent acknowledge that racism towards Black, Indigenous and racialized people exists, both totals have declined since 2020 (from 82 per cent for both in 2020).

The community's commitments to EDIA are vitally important, but meeting these goals will require even stronger investments and actions in 2023 and beyond. EDIA work is a journey of continuous improvement with no final destination. And it is crucial work—Statistics Canada indicates that two of every five Canadians will be members of a racialized group by 2041, just one indication of how diverse our cities are becoming.

EDIA IN CALGARY

BY THE NUMBERS

At the start of 2022, over 36 per cent of Calgarians identified as visible minorities, the

3RD HIGHEST

proportion among Canadian metro areas after Toronto and Vancouver.³¹



BE LOCAL

Be Local's network of impact-focused businesses, with a membership base of 467 companies, had an outstanding year in 2022, especially in terms of EDIA:

78%

of Be Local businesses paid living wage (\$18.60 or more) to 78.2% of their employees.³³

86%

of Be Local businesses whose ownership includes one or more people representing an Equity-deserving group.

74%

include one or more women within their ownership structure.

13%

include one or more people from the LGBTQIA2S+ community.

22%

include one or more immigrants or refugees.

12%

include someone living with a (visible or invisible) disability or impairment.

22%

include one or more people of colour.

10%

include one or more people who identify as First Nations, Métis or Inuit.





09

TRUTH AND RECONCILIATION

Calgary is a city that pursues Truth and Reconciliation with Indigenous peoples and communities.

In recognition of the Truth, the historic injustices and inequalities faced by Indigenous people in Alberta and beyond, Calgary's civic, educational and economic institutions made investing in reconciliation a priority in 2022. This is only just the beginning, as encouraging new initiatives emerged across the city.

To support Indigenous communities, Calgary Economic Development is working with the City of Calgary's Indigenous Relations Office and MNP on a first-of-its-kind research study to measure the economic contributions of Indigenous governments, households and businesses in Treaty 7, Metis Nation Region 3, and urban Indigenous Peoples. Study findings will inform the path forward for Economic Reconciliation in the Calgary region.



▲ Photo credit: Colin Way

The Calgary Foundation provided a powerful example of the ongoing effort for Reconciliation with a \$1 million investment into University of Calgary's Indigenous Strategy, *ii'taa'poh'to'p* – the largest gift the strategy has ever received. The funding will be invested in Indigenization of curricula across campus, widening pathways to education for Indigenous students, strengthening connections between Elders and students, supporting leaders in Indigenous engagement and helping to preserve oral traditions, systems and processes.

The city also opened its first playground focussed on bringing Indigenous knowledge to children and families through play this past year. The new playground, at the St. Kateri Tekakwitha School in the northeast, was five years in the making and includes an eagle climbing wall, a teepee climber, a dream catcher structure and a sharing circle that highlights the colours of the medicine wheel. There is also an outdoor classroom for students to learn about the Siksikaitsitapi, Siksika, Kainai, Piikani, Amskappi Pikun and Iyarhe Stoney Nations, and Metis Nation Region 3. Similarly, youth from the Urban Society for Aboriginal Youth developed indigiTRAILS, a Pokemon-GO-style

interactive app that uses GPS and augmented reality to support users in understanding the Indigenous history of Calgary.

The City of Calgary provided \$1 million to the City's Indigenous Relations Office to project manage the building of a memorial to honour the lives of the children lost to the residential school system. To mark National Indigenous Peoples Day in June, Calgary hosted its thirteenth annual Walk of Reconciliation. Over 200 people participated in the Walk and attended the programming to engage in Indigenous culture, songs and language. The City of Calgary's third annual Orange Shirt Day Ceremony on the National Day for Truth & Reconciliation in September also drew large crowds at Fort Calgary and will return in 2024.

The strides made toward reconciliation in 2022 create a solid base for years to come, and there are many community members across the city thoughtfully engaged in that work. We have only just begun to truly comprehend the Truth and Reconciliation Commission's Calls to Action and what they mean for Calgary. The work of embedding them into the community's activities is a long-term, never-ending journey.



10

THE PATH FORWARD FOR 2023 AND BEYOND

Calgary's strong performance in the new economy in 2022 has laid solid foundations for continued success, with big opportunities already emerging for 2023 and beyond.

Calgary's International Airport is already forecasting nearly a total recovery to 2019 levels of 17 to 18 million passengers, while WestJet has announced new summer routes to Tokyo, Barcelona and Edinburgh, and an increase to 25 total U.S. destinations. Porter Airlines added Calgary as a destination in the first quarter of 2023, and both Lynx Air and Flair have added new flights from Calgary.

CADA has plans to invest more than \$14 million in the coming year – providing grants to artists, arts organizations, collectives, and events to help the arts sector through its recovery period. CADA's commitment to a year-round arts and culture experience economy will continue with RISE UP and Chinook Blast, as well as expanded investments through sponsorships to creative businesses to ensure a diversity of public art events. CADA's 2023 Living a Creative Life Congress will focus on art for social change, including a component around youth and the arts in 2023, while its Original Peoples Investment Program (OPIP), Indigenous Artist Microgrants, and Honouring the Children Grant will be delivered in 2023 to support Indigenous artists and organizations.



As a city, we continue to be ready to face the challenges of the future with confidence.



The City of Calgary will build on the first steps in its commitment to Truth and Reconciliation in the coming year, building an Indigenous procurement program to foster social and economic reconciliation with Indigenous people. The program will be developed through engagement with Indigenous communities regarding business opportunities, their interest in and capacity for City contracts, and identifying challenges and barriers.

The City of Calgary has also unveiled plans to build a permanent memorial to honour Residential School survivors and the thousands of children who never returned home. The Indian Residential School Memorial Project (IRS) is designed to provide a place for people to pay respects and ensure that the history and legacy of the schools are never forgotten. The City of Calgary's Indigenous Relations Office, in relationship with the IRS Elders Advisory Group, IRS working group, and local Indigenous community, is co-creating a memorial site through dialogue guided by the seven sacred teachings and by community discussions. The relationship with the Indigenous community will guide construction of the IRS memorial through an Indigenous lens.

Plans are also underway to create Canada's First LGBTQIA2S+ Addiction Recovery Centre in Calgary, using a safe space provided by Stonewall Recovery Centre.

Calgary Economic Development, OCIF, The City of Calgary, and Platform Calgary will continue to collaborate in the coming year to continue development work on an Innovation District as a catalyst for future growth and prosperity, building on

plans for a hybrid approach. The framework for the Innovation District includes the development of both a virtual and physical presence rooted in the creative economy and located centrally in downtown Calgary.

Tourism Calgary is anticipating another busy year in 2023, with 52 sports, cultural and major events already confirmed with anticipated overall economic impact of more than \$120 million, as well as 80 meetings and conventions already on the city's schedule for 2023 with an economic impact of \$80 million.

The City has further investments in affordable housing in the works this year as well, and several events including a Hackathon focused on how to enhance Calgary's standing as a winter city.

As Calgary looks ahead to the rest of 2023 and beyond, 2022 provided significant momentum. Calgary has established an enviable position in the new economy. Calgary is prosperous and growing, embracing change and diversity, attracting talent and innovation, and continuing to build on a vibrant culture, a welcoming business environment and a distinctive brand.

To maintain that enviable position, Calgary will have to work harder than ever. The competition for talent and exciting innovations only grows more intense each year, and the potential challenges that come with our enviable livability and strong business environment are not trivial. In the face of economic uncertainties, a rapidly transforming global energy industry, and mounting climate volatility, Calgary must continue to invest in its many strengths and take on the challenges of the future with confidence, grounded by our collective values.

APPENDIX

DATA TABLES

Please note that collection timelines and availability of source data will impact the ability to provide reportable year-over-year data and information consistently on an annual basis. This includes any data sourced from Statistics Canada's Census of Population which is conducted every five years. Other data sourced from private and non-governmental entities cannot be guaranteed and depends on each respective organization's commitments to conducting the requisite research and making it publicly available.



**PRIORITY 1:****BE A WELCOMING CITY WHERE EVERYONE CAN GROW THEIR CAREERS****KPI #1:** Economic participation of newcomers**ECONOMIC ASSIMILATION (INCOME-BASED MEASURE) OF IMMIGRANTS³⁴**

Status	2020 ³⁵	2019	2018	2017	Data Availability
Immigrant – PR ³⁶	31,320	34,907	34,307	33,067	Annually
Immigrant – Non PR ³⁷	24,300	28,880	28,260	27,570	
Immigrant - Aggregate	31,200	34,940	34,400	33,520	
Total – Immigrant and Non-Immigrant	42,400	45,000	42,400	44,700	

KPI #2: Youth retention³⁸ and immigration

	2022/2021	2020/2021	2019/2020	Data Availability
Youth retention	83.8% ³⁹	84.6% ⁴⁰	86.6% ⁴¹	Annually
Youth immigration	3,907 ⁴²	1,584	2,351	Annually

KPI #3: Diverse and Indigenous representation in leadership**INDIGENOUS REPRESENTATION IN LEADERSHIP⁴³**

	2022 ⁴⁴	Data Availability
Number of Indigenous people employed in management in Calgary	<250	Five years – Federal Census

PRIORITY 2:

PROVIDE ADAPTIVE, FUTURE-FOCUSED LEARNING OPPORTUNITIES THAT EMPOWER LIFE-LONG SKILLS DEVELOPMENT

KPI #1: Level of education attained (K-12, post-secondary, continuing education / skills development)

SCHOOLING ENROLMENT RATES (SECONDARY)⁴⁵

Program	2021/2022 Secondary School Enrolments	2020/2021 Secondary School Enrolments	Data Availability
Secondary	1,000	992	Annually
Public	125,226	122,451	
Private	3,217	2,979	
Separate	56,691	56,322	
TOTAL	186,134	182,744	

SCHOOLING ENROLMENT RATES (SECONDARY)

2021-2022 Schooling Enrollment Rates ⁴⁶	2020-2021 Schooling Enrollment Rates	2019-2020 Schooling Enrollment Rates	Data Availability
Total: 67,257 (+1.8%)	Total: 66,084 (+0.9%)	Total: 65,489 (+1.5%)	Annually
International: 9,792 (+17.3%)	International: 8,346 (-1.3%)	International: 8,459 (+17.9%)	
Indigenous: 2,551 (+8.4%)	Indigenous: 2,353 (+4.3%)	Indigenous: 2,255 (+4.5%)	

2021-2022 Schooling Completion Rates ⁴⁷	2020-2021 Schooling Completion Rates	2019-2020 Schooling Completion Rates	Data Availability
Total: 20,033 (-1.0%)	Total: 20,243 (+11.5%)	Total: 18,150 (-5.5%)	Annually
International: 2,630 (-12.2%)	International: 2,955 (+19.3%)	International: 2,510 (+21.4%)	
INDIGENOUS: 698 (+15.0%)	Indigenous: 607 (+1.2%)	Indigenous: 600 (+1.5%)	

KPI #2: STEAM (Science, Technology, Engineering, Arts and Mathematics) training programs

PARTICIPATION IN SKILLS-DEVELOPMENT OFFERINGS WITH ECOSYSTEM PARTNERS⁴⁸

	2022		2021		2020		Data Availability
	Enrollments	Completions	Enrollments	Completions	Enrollments	Completions	
Post-Secondary Programs	5,234	1,894	6,072	2,352	7,194	1,706	Annually
Non-Post-Secondary Programs	3,085	2,866	2,574	2,254	1,574	1,828	

KPI #3: Availability and participation in non-traditional learning (micro-credentialing, work-integrated learning)

ENROLLMENT IN WIL OFFERINGS WITHIN THE ECOSYSTEM⁴⁹

	2022		2021		Data Availability
	Availability	Participation	Availability	Participation	
Work-Integrated Learning	131	1678 ⁵⁰	148	1,164	Annually

KPI #4: Indigenous training and business acceleration program participation

TECH TALENT PROGRAMS OFFERED SPECIFICALLY FOR INDIGENOUS COMMUNITIES⁵¹

	2022	2021	Data Availability
Number of programs	3	1	Annually
Number of participants	36	28	

PRIORITY 3:

ATTRACT PEOPLE WHO WANT TO MAKE A DIFFERENCE, CREATE SOLUTIONS AND CHANGE THE WORLD

KPI #1: Population growth⁵²

Indicators	2022	2021	2020	Data Availability
Net population change	49,754	15,632	28,530	Five years – Federal Census
Intra-provincial migration	1,731	1,953	3,047	
Inter-provincial migration	10,916	2,323	801	
International migration	29,513	8,097	15,460	

KPI #2: Employment rates across diverse sectors⁵³

Sectors	Employment rate	Data Availability
Manufacturing	3.7% (-0.9 %pts)	Annually
Construction	8.1% (-0.1%pts)	
Primary & Utilities	6.3% (-0.6%pts)	
Wholesale Trade	3.1% (+0.3%pts)	
Retail Trade	12.0% (+2.1%pts)	
Transportation & Warehousing	6.2% (+0.4%pts)	
Information & Cultural	1.6% (+0.2%pts)	
Finance & Insurance, Real Estate	8.1% (-0.4%pts)	
Professional, Scientific & Technical	11.9% (+0.3%pts)	
Educational Services	6.7% (-0.6%pts)	
Health Care & Social Assistance	11.7% (-0.5%pts)	
Arts, Entertainment, Recreation	2.6% (+1.1%pts)	
Accommodation & Food Services	5.4% (+0.8%pts)	
Other Services	2.6% (-0.8%pts)	
Public Administration	3.6% (+1.2%pts)	

KPI #3: Jobs created

Indicators	2022	2021	2020	Data Availability
Jobs created (excluding film, TV & IDM)	5,423⁵⁴	5,330 ⁵⁵	3,060 ⁵⁶	Annually

**PRIORITY 1:****BIULD A CITY WITH A NET ZERO ECONOMY****KPI #1:** Carbon emissions⁵⁷**GHG/TONNES OF CO2E EMITTED**

2022	2021	Data Availability
Data available in June 2023	15,925,018 tonnes CO2-eq	Annually (June)

KPI #2: Energy transition and climate change investment⁵⁸**CITY OF CALGARY BUDGET DEDICATED TO CLIMATE MITIGATION AND ADAPTATION**

2022	Data Availability
\$255 Million	Four years (budget cycle)

PRIORITY 2:**CREATE A CITY WHERE EVERYONE IS WELCOME, SAFE AND ABLE TO BUILD A MEANINGFUL LIFE****KPI #1:** Diversity of population⁵⁹

Visible minority population	2022	Data Availability
Total visible minority population total	36.4% (or 567,960 people)	Five years – Federal Census
South Asian	9.82%	
Chinese	5.99%	
Filipino	5.71%	
Black	4.85%	
Latin American	2.20%	
Arab	2.08%	
Southeast Asian	1.82%	
West Asian	1.00%	
Korean	0.83%	
Japanese	0.40%	
Other visible minority	0.37%	
Multiple visible minorities	1.31%	
Not a visible minority	57.5%	

EXTERNAL PERCEPTIONS THAT CALGARY IS A DIVERSE AND INCLUSIVE CITY⁶⁰

Indicator	2022	Data Availability
Leaders in other markets perceive Calgary as diverse and inclusive ⁶¹	75%	Annually
Talent in other markets perceives Calgary as diverse and inclusive ⁶²	61%	

KPI #2: Perception of safety across dimensions of diversity

CITIZEN'S PERCEPTION OF SAFETY⁶³

Indicator	2022	2021	Data Availability
Per cent of Calgarians concerned about safety	73%	65%	Annually

KPI #3: Affordable housing⁶⁴

Indicator	2022	2021	2020	Data Availability
Number of affordable housing units	7,100	7,100	7,108	Annually

KPI #4: Percentage of the population living downtown

Indicator	2022	Data Availability
Population living downtown	3.2% ⁶⁵	Five years – Federal Census
Downtown population growth rate	21.0% ⁶⁶	

KPI #5: Perception of quality of life⁶⁷

Indicator	2022	2021	2020	Data Availability
Citizen's perception of quality of life	64%	64%	75%	Annually
Citizen's reporting a healthy sense of belonging	80% ⁶⁸	28% ⁶⁹	45%	

**PRIORITY 3:
BUILD VIBRANT, HEALTHY AND ACCESSIBLE COMMUNITIES**

KPI #1: Accessible communities and infrastructure⁷⁰

Indicator	2022	2021	Data Availability
Percentage of population within Major and Community Activity Centres, and 600m of Urban and Neighborhood Corridors	30%	21%	Annually

KPI #2: Perceptions of amenity-rich communities⁷¹

Indicator	2022	2021	2020	Data Availability
Citizens proud to live in their neighbourhoods	81%	84%	85%	Annually
Citizens regularly involved in neighbourhood and local community events	27%	26%	26%	

KPI #3: Convenient and accessible transit and modes of transportation⁷²

Indicator	2022	2021	2020	Data Availability
Percentage of population within 400m of Primary Transit Network⁷³	45%⁷⁴	Not reported	37%	Annually
Percentage of population within Major and Community Activity Centres, and 600m of Urban and Neighborhood Corridors	30%	29.5% ⁷⁵	29%	
Percentage of trips using walking and cycling transportation	22%	20%	18%	
Percent of trips using transit	3%	Not reported	7%	
Perceptions of ability to move across the city	72% satisfied/ very satisfied with Calgary Transit 61% agree more money should be invested into Calgary Transit	84% satisfied/ very satisfied with Calgary Transit 51% agree more money should be invested into Calgary Transit	Not reported	

KPI #4: Global livability score⁷⁶

Indicator	2022	2021	Data Availability
Global Livability Index	3rd	18th	Annually

PRIORITY 4:

BE KNOWN AS AN INVITING CITY WITH YEAR-ROUND EXPERIENCES FOR EVERYONE TO ENJOY

KPI #1: Accessible recreation programs and participation

Indicator	2022	2021	2020	Data Availability
Number of amenities (theatres, museums, concert halls, art galleries, sport and recreation facilities) ⁷⁷	877	853	Not reported	Annually
Number of visits to City and YMCA operated recreational facilities across Calgary ⁷⁸	2,936,532 (membership visits to City facilities operated by YMCA)	2,137,734 (YMCA)	1,299,713	
	214,475 (drop-in visits)	978,219 (City of Calgary)		
Participation in City of Calgary recreation programs ⁷⁹	2.69 million	Not reported	Not reported	

CITY OF CALGARY SOCIAL RECREATION PROGRAMS IN 2022⁸⁰

	Number of programs offered	Number of participants	Data Availability
Alberta Cancer Exercise Program (Maintenance and Survivorship Classes)	11	130	Annually
Adapted Fitness	39	221	
Adapted Junior Golf Lessons	4	120	
Adaptive Family Golf Nights	4	40	
Plus Size Fitness	2	18	
Gentle Fitness Stream of Programs	14 Registered Programs	130	
	14 Drop-In Programs (2,200 individual classes)	26,000	
Association for the Rehabilitation of the Brain Injured (ARBI) Program	40 (offered weekly)	280	
Fitness & Nature Skill Series	12	120	
Mobile Adventure Playground	61	2584	
CCIS Afghan Refugee Program	16	582	

KPI #2: Public arts, culture and entertainment events⁸¹

Indicator	2022 ⁸²	2021 ⁸³	2020 ⁸⁴	Data Availability
Number of participants at public arts events hosted	2,826,990	1,461,106	3,150,321	Annually
Number of public arts events hosted	7,998	7,486	12,302	
Number of arts education activities provided by Calgary arts organizations for children and youth	4,972	4,494	9,000	
Number of children and youth who participated in arts education activities provided by Calgary arts organizations	194,538	79,516	318,423	
Number of Indigenous artists and Indigenous led organizations receiving funding.	63	53	42	

KPI #3: Tourism and visitor economy⁸⁵

Indicator	2022	2020	Data Availability
Number of events hosted by the TELUS convention Centre ⁸⁶	163 ⁸⁷	70	Annually
Number of delegates hosted by the TELUS convention Centre ⁸⁸	119,207 ⁸⁹	Not reported	
Number of major events secured by Tourism Calgary ⁹⁰	60	Q1 = 25 Q2-4 = 45	
Direct economic impact for events secured by Tourism Calgary ⁹¹	\$37M	Not reported	
Number of visitors ⁹²	6.1M	Not reported	
Visitor Spend ⁹³	\$1.5B	Not reported	

KPI #4: Investment from film and TV productions⁹⁴

Indicator	2022	2021	2020	Data Availability
Film, television production and IDM spend (millions)	\$461	\$522	\$87	Annually



BUSINESS ENVIRONMENT

PRIORITY 1:

BUILD A GLOBALLY AND DIGITALLY CONNECTED CITY

KPI #1: Physical connectivity⁹⁵

Indicator	2022	2021	2020	Data Availability
Physical connectivity activity (air cargo volumes)	5,366	5,363	4,782	Annually
Number of non-stop flights	86	76	42	

KPI #2: Commercial / Industrial real estate

Indicator	2022	2021	Data Availability
Vacancy Rates - Downtown (incl. classes) ⁹⁶	Central Core: 25.4%	Class A Vacancy Rate: 27.2%	Quarterly
	Mid-West Core: 52.1%		
	West End: 31.7%		
	East End: 38.3%	Downtown Total: 33.2%	
	Downtown Total: 32.60%		
Vacancy Rates - Industrial (incl. classes) ⁹⁷	Calgary Total: 2.1% Northeast: 2.0% Southeast: 2.1% South Central (Downtown): 1.7% Other: 3.1%	Calgary Total: 3.3% Northeast: 3.4% Southeast: 3.6% Other: 3.4%	Quarterly

PRIORITY 2:**BE A PLACE WHERE BUSINESSES ARE ENCOURAGED TO TEST AND USE TECHNOLOGY AND DATA TO START, GROW AND THRIVE****KPI #1:** Technology pilots and testing areas

Indicator	2022	2021	2020	Data Availability
Living Lab projects: East Shepard site (ESDOA)⁹⁸	159	50	9	Annually

KPI #2: Open datasets and shared business intelligence⁹⁹

Indicator	2022	2021	2020	Data Availability
Number of available open datasets	950	372	340	Annually

KPI #3: Number of headquarters per capita¹⁰⁰

Indicator	2022	2021	2020	Data Availability
Number of corporate head offices in Calgary	99	102	118	Annually (August)

PRIORITY 3:

CHAMPION EFFICIENT AND EFFECTIVE POLICIES SUPPORTING BUSINESS PRACTICES

KPI #1: Companies retained, attracted, expanded¹⁰¹

Indicator	2022	2021	2020	Data Availability
Companies attracted/retained/expanded - all sectors (excluding film, television & IDM)	23	30	43	Annually

KPI #2: Perception that it's easy to do business in Calgary¹⁰²

Indicator	Business Leaders (agree/strongly agree)			Data Availability
	2022	2021	2020	
Calgary is an easy place to do business	72%	77%	75%	Annually
Calgary has a diverse economy that can support other industries	77%	76%	71%	
Calgary is a low-cost jurisdiction to do business	66%	65%	62.5%	
Calgary's economic outlook is uncertain	53%	60%	61%	

KPI #3: Efficient business, development and building permits process¹⁰³

Indicator	2022	2021	Data Availability
Multidisciplinary development applications where decision timeline commitments were met.	85%	85%	Annually
Technical development applications where decision timeline commitments were met.	79%	84%	Annually

**PRIORITY 1:****BUILD AN ENVIRONMENT WHERE CALGARY COMPANIES CAN ACCELERATE AND SCALE TO COMPETE GLOBALLY****KPI #1:** Number of startups and technology companies in Calgary¹⁰⁴

Indicator	2022	2021	2020	Data Availability
Startup companies identified in Calgary (1 - 4 employees)	428	385	269	Annually
Core technology companies identified in Calgary (>5 employees) ¹⁰⁵	599	527	452	Annually

KPI #2: Number of venture deals and total capital funds¹⁰⁶

Indicator	2022	2021	2020	Data Availability
Number of Venture deals and total capital funds secured	64 deals (#4 in Canada)	66 (#4 in Canada)	33 (#4 in Canada)	Annually
Venture Capital Investment (Millions)	\$647	\$500	\$353	Annually

KPI #3: Diversity of startup leadership¹⁰⁷

Indicator	2022	2021	Data Availability
Identify as being neurodiverse	13%	12.5%	Annually
Identify as LGBTQ¹⁰⁸	7%	Data not recorded	
Identify as women	44%	40%	

PRIORITY 2:

BE A MAGNET FOR INNOVATIVE AND CREATIVE THINKERS BY INVESTING IN DEVELOPMENT AND ATTRACTION OPPORTUNITIES

KPI #1: Number and diversity of workers in STEAM fields¹⁰⁹

Indicator	2022	Data Availability
Total # of workers STEM Field only	73,360	Five years – Federal Census
Men	56,645	
Women	16,715	
Total # of workers in STEM only by visible minority	30,905	
Men	23,515	
Women	7,385	
Total # of workers in STEM and STEM related fields	148,750	
Men	87,990	
Woman	60,760	
Total # of workers in STEM and STEM related fields by visible minority	56,190	
Men	33,915	
Women	22,275	

KPI #2: Number of applicants for visas and tech immigration programs

Indicator	2022	2021	2020	Data Availability
Startup Visa companies¹¹⁰	4	5	6	Annually

PRIORITY 3:

ACCELERATE REAL-WORLD APPLICATION OF RESEARCH AND DEVELOPMENT THROUGH CORPORATE INVESTMENT AND POST-SECONDARY INSTITUTION (PSI) COLLABORATION

KPI #1: Corporate R&D spend¹¹¹

Indicator	2022 ¹¹²	2021 ¹¹³	2020 ¹¹⁴	Data Availability
Corporate R&D spend	\$1,269,680	\$1,156,210	\$1,635,527	Annually

KPI #2: Sponsored research (by companies with PSIs)

NUMBER OF PROJECTS WITH CORPORATE PARTNERS

PSIs	2021/2022	2020/2021
University of Calgary¹¹⁵	638	646

NUMBER OF EXTERNAL PARTNERSHIPS

PSIs	2021/2022	2020/2021	2019/2020
Bow Valley College ¹¹⁶	32	No data available	24
SAIT ¹¹⁷	300	Not reported	Not reported

KPI #3: PSI spin out companies

PSIs	2022	2021
University of Calgary ¹¹⁸	18	21
Mount Royal University ¹¹⁹ (Growth Catalyst cohorts)	13	Not reported



PRIORITY 1:

DEMONSTRATE CALGARY IS A VIBRANT AND INCLUSIVE COMMUNITY WITH GLOBAL PERSPECTIVE

KPI #1: Welcoming the world to iconic events and experiences¹²⁰

	2022		
Event	Attendance	Economic Impact	Data Availability
Chinook Blast	410,000	\$8.2M	Annually
Calgary Stampede	1.2M	90% hotel occupancy	

KPI #2: Celebration of global festivities¹²¹

Indicator	2022	Data Availability
Subsidized events by the City of Calgary	90	Annually

KPI #3: Indigenous and multicultural tourism experiences¹²²

Indicator	2022	Data Availability
Indigenous tourism experiences	12	Annually

PRIORITY 2:

TELL A UNIFIED STORY TO STRENGTHEN CONSISTENT AND UNIQUE IDENTITY HERE AND EVERYWHERE

KPI #1: Local, national and international perceptions of Calgary¹²³

Indicator	Business Leaders (agree/strongly agree) All markets	Tech/Key Sector Workers (agree/strongly agree) All markets	Data Availability
Favourable impression of Calgary	90% (1% increase from 2021)	72% (3% increase from 2021)	Annually
Calgary is becoming a new hub for technology and innovation	74% (6% increase from 2021)	Not surveyed	
Calgary has a diverse economy	76% (6% increase from 2021)	51% (4% increase from 2021)	
Would consider expanding in Calgary	55% (7% increase from 2021)	Not surveyed	
Canadian workers would consider moving to Calgary	Not surveyed	56% (12% increase from 2021)	
There are a wide variety of career opportunities – not just an energy city	80% (6% increase from 2021)	57% (4% increase from 2021)	
Calgary is a diverse and inclusive city	Not surveyed	61% (New)	
Calgary is a place to build a career	Not surveyed	58% (New)	

PRIORITY 3:

SHARE CALGARY’S STORY AS AN AMBITIOUS CITY FULL OF ENERGY, OPTIMISM AND OPPORTUNITY

KPI #1: Earned media about Calgary as a city of opportunity¹²⁴

2022	2021	2021	2020	Data Availability
2609 media mentions	2,609	1,882	836	Annually

KPI #2: Amplification of stories about Calgary¹²⁵

Storytelling Indicator	2022	Data Availability
Social media posts	3,593	Annually
Social media engagements	193,611	
Newsroom story page views	101,813	
Media ad equivalency	\$36.18M	

KPI #3: Positive sentiment of media coverage¹²⁶

	2022	2021	2020	Data Availability
Sentiment	99% positive or neutral sentiment	99% positive or neutral sentiment	97% positive or neutral sentiment	Annually

APPENDIX

END NOTES

1. ATB Economic Forecast: <https://www.atb.com/company/news/releases/atb-financials-forecast-for-albertas-economy-in-2023/>
2. Edmonton, Calgary bring in \$10K over national average in household income: Stats Can : <https://globalnews.ca/news/8986382/edmonton-calgary-higher-national-average-household-income-statistics-canada/>
3. Calgary goes against national trend, adds jobs to market: <https://calgary.citynews.ca/2022/09/10/calgary-national-jobs/>
4. More people are moving to Calgary area than anywhere else on Prairies: <https://calgaryherald-com.cdn.ampproject.org/c/s/calgaryherald.com/news/local-news/calgary-area-fastest-growing-in-prairies-statcan/wcm/82960e88-e065-47fa-959c-833cb104c4cf/amp/>
5. Statistics Canada. Table 98-10-0308-01 Visible minority by immigrant status and period of immigration: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts
6. Get technology training for a career in IT: <https://momentum.org/programs-services/get-a-good-job/tech-plus-networking-and-cloud-technology-training/>
7. Economic Intelligence Unit (EIU) The Global Livability Index 2022
8. Statistics Canada. Table 1 Population and population growth rate of primary downtowns, 2016 to 2021 (3901). <https://www150.statcan.gc.ca/n1/daily-quotidien/220209/t001b-eng.htm>
9. Data provided by City of Calgary
10. Data provided by City of Calgary
11. Cities with the Best Work-Life Balance 2022: <https://www.getkisi.com/work-life-balance-2022#table>
12. Data provided by The Conference Board of Canada
13. Statistics Canada. Table 17-10-0136-01 Components of population change by census metropolitan area and census agglomeration, 2016 boundaries
14. Statistics Canada. Table 17-10-0136-01 Components of population change by census metropolitan area and census agglomeration, 2016 boundaries
15. Data provided by The Calgary Airport Authority
16. FP500 + 800 databases data are released in August and the data reflects numbers from the previous year. This year, we are reporting on 2021 data as it is the most recent number available.
17. CBRE - Calgary Downtown Office Figures Q4 2022
18. CBRE - Calgary Industrial Figures Q4 2022
19. This data was collected by Zinc Ventures, A100, and Platform Calgary and is a Zinc Ventures prototype as part of the Butterfly Collection. Data is current as of February 21, 2023.
20. Canadian Venture Capital & Private Equity Association (CVCA), Venture Capital Canadian Market Overview, 2022 Year-In-Review report.
21. Canadian Venture Capital & Private Equity Association (CVCA), Venture Capital Canadian Market Overview, 2022 Year-In-Review report.
22. Canadian Venture Capital & Private Equity Association (CVCA), Venture Capital Canadian Market Overview, 2022 Year-In-Review report.

23. Calgary's technology industry one of the fastest growing in North America: <https://calgaryjournal.ca/2022/06/08/calgarys-technology-industry-one-of-the-fastest-growing-in-north-america/>
24. CBRE Canada Tech-30 2022 report
25. CBRE Canada 2022 Scoring Tech Talent report
26. Based on the Calgary-based headquartered companies on Canada's Top 100 Corporate R&D Spenders 2022 list, <https://researchinfosource.com/top-100-corporate-rd-spenders/2022/list>
27. Data provided by the City of Calgary
28. 'Pretty fantastic feeling': Calgary restaurants come to life as receipts climb: <https://calgaryherald.com/business/pretty-fantastic-feeling-calgary-restaurants-come-to-life-as-receipts-climb>
29. Return of rush hour: Data shows rebound in vehicle traffic in downtown Calgary: <https://globalnews.ca/news/8790748/mobility-trends-report-shows-traffic-returning-to-downtown-calgary/>
30. Calgary Economic Development 2022 Digital Analytics Review
31. Calgary Economic Development 2022 Digital Analytics Review of LinkedIn, Twitter, Facebook and Instagram
32. Statistics Canada. Table 98-10-0308-01 Visible minority by immigrant status and period of immigration: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts
33. Data provided by Be Local Calgary via Momentum
34. Statistics Canada. Table 43-10-0030-01 Immigrant taxfilers by economic outcomes and tax year, census metropolitan areas, 2020 constant dollars. Please note there is a two-year delay in data availability. 2020 is the most recently year data is available for.
35. The data looks at the 5-year average of the median employment income from when an immigrant was admitted. The 5-year average is calculated by looking at the previous 5-years of employment income by immigrants admitted in each past year. Eg. The average median employment income of immigrants for 2020 is the average of the median employment income for immigrants admitted in 2015-2019.
36. Includes total immigrants sponsored by family and economic immigrants (principal applicant, spouse, and dependent).
37. Includes refugee and non-economic immigrant pathways.
38. Retention rate represents the percentage of immigrant tax filers continuing their residence in the geographical area (province or census metropolitan area as designated) of intended destination geography, in year X. This does not consider immigrants migrating in from another destination. Youth retention rate is measured by interprovincial and international migration. This data is on a two-year lag. The most recent data was released in December 2022 but the most recent year available is 2020.
39. Retention Rate of immigrants aged 15 to 24 years, admitted year 2015, by VECTOM: 2020 (most recent data).
40. Retention Rate of immigrants aged 15 to 24 years, admitted year 2015, by VECTOM: 2019.
41. Retention Rate of immigrants aged 15 to 24 years, admitted year 2015, by VECTOM: 2018.
42. Statistics Canada. Table 43-10-0022-01 Mobility of immigrant tax filers by census metropolitan areas and tax year.
43. Custom dataset from Statistics Canada, 2022
44. Fewer than 250 explicitly identified Indigenous people work in leadership positions in Calgary based on NOC classification. The exact number is not available at this time as the number does not meet the threshold of confidentiality.
45. City of Calgary School Enrolment Data, <https://data.calgary.ca/Demographics/School-Enrolment-Data/9qye-mibh>

46. Government of Alberta's Open Data dataset, Full Load Equivalent (FLE) enrolment within the Alberta post-secondary education system.
47. Government of Alberta's Open Data dataset, Program completions within the Alberta post-secondary education system.
48. This data is from Calgary Economic Development's Tech Training Survey 2022, and only reflects a snapshot of the ecosystem. Respondent's organizations include not for profit, for profit and post-secondary institution. Data is current as of March 22, 2023.
49. This data is from Calgary Economic Development's Tech Training Survey 2022, and only reflects a snapshot of the ecosystem. Respondent's organizations include not for profit, for profit and post-secondary institution. Types of programs offering WIL include: apprenticeship, work experience, co-operative education, other, practicum, internship, capstone project. Data is current as of March 22, 2023.
50. This number is an estimate due to gaps in the dataset
51. This data is from Calgary Economic Development's Tech Training Survey 2022, and only reflects a snapshot of the ecosystem. Respondent's organizations include not for profit, for profit and post-secondary institution. Data is current as of March 22, 2023.
52. Statistics Canada. Table 17-10-0136-01 Components of population change by census metropolitan area and census agglomeration, 2016 boundaries. Note that there have been slight adjustments to the previous years data - this is not uncommon in StatCan datasets.
53. This data was retrieved by using the Conference Board of Canada employment numbers divided by Statistics Canada labour force size to get employment rate by industry.
54. Data retrieved from Calgary Economic Development end of year Balanced Scorecard 2022. Includes direct jobs created/retained/expanded for all sectors and based on a forecasted three-year job count.
55. Data retrieved from Calgary Economic Development end of year Balanced Scorecard 2021. Includes direct jobs created/retained/expanded for all sectors and based on a forecasted three-year job count.
56. Data retrieved from Calgary Economic Development end of year Balanced Scorecard 2020. Includes direct jobs created/retained/expanded for all sectors and based on a forecasted one-year job count.
57. Data provided by The City of Calgary.
58. Data provided by The City of Calgary.
59. Statistics Canada. Table 98-10-0308-01 Visible minority by immigrant status and period of immigration: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts
60. Calgary Economic Development External Perceptions Final Report, 2022. Markets surveyed: Canada, U.S., and United Kingdom.
61. Agree/Strongly agree with the statement that "Calgary is a diverse and inclusive city" New statement for 2022.
62. Agree/Strongly agree with the statement that "Calgary is a diverse and inclusive city" New statement for 2022.
63. Calgary Foundation, 2022 Quality of Life Report.
64. Data provided by The City of Calgary.
65. Statistics Canada. Table 1 Population and population growth rate of primary downtowns, 2016 to 2021 (3901). <https://www150.statcan.gc.ca/n1/daily-quotidien/220209/t001b-eng.htm>. Per cent of the total population (46,763 people).
66. Statistics Canada. Table 1 Population and population growth rate of primary downtowns, 2016 to 2021 (3901). <https://www150.statcan.gc.ca/n1/daily-quotidien/220209/t001b-eng.htm>.
67. Calgary Foundation, 2022 Quality of Life Report.

68. Sense of belonging was reported differently in 2022. Reported on “healthy sense of belonging”.
69. Sense of belonging was reported differently in 2021 and 2020. Reported on “strong sense of belonging”.
70. Data provided by The City of Calgary.
71. 2022 Fall Survey of Calgarians - Final Report: <https://www.calgary.ca/content/dam/www/cfod/csc/documents/cit-sat/2022-Fall-Survey-of-Calgarians-Final-Report.pdf>.
72. Data provided by the City of Calgary unless otherwise indicated.
73. Data retrieved from The Calgary Municipal Development Plan and Calgary Transportation Plan: 2022 Monitoring Progress Report. Results are reported with the most current data available. The number reported is from the following data sources: 2016 Place of Work Survey, Civic Census; and 2019 Civic Census.
74. Number reported on is a 60-year-target.
75. Data retrieved from The Calgary Municipal Development Plan and Calgary Transportation Plan: 2022 Monitoring Progress Report (Latest Data; 2019, 2016).
76. Economic Intelligence Unit (EIU) The Global Liveability Index 2022
77. Trip Advisor “Things to do in Calgary” as of March 23, 2023
78. Data provided by The City of Calgary
79. Data provided by The City of Calgary
80. Data provided by The City of Calgary. All City of Calgary Social programs are offered at no cost and placed in targeted locations, making them accessible by removing the barrier of cost and location.
81. Data provided by Calgary Arts Development and represents attendance at Calgary based events only.
82. Data collected from January 1-December 31, 2021.
83. Data collected from January 1-December 31, 2020.
84. Data collected from January 1-December 31, 2019.
85. No data was reported in 2021 and limited data is available for 2020 due to COVID disruptions to operations.
86. Data provided by TELUS Convention Centre.
87. Due to continued COVID restrictions in Q1 of 2022, these event numbers reflect events from Q2-Q4.
88. Data provided by TELUS Convention Centre.
89. Due to continued COVID restrictions in Q1 of 2022, these event numbers reflect events from Q2-Q4.
90. Data provided by Tourism Calgary
91. Data provided by Tourism Calgary
92. Data provided by Tourism Calgary
93. Data provided by The Conference Board of Canada
94. Data retrieved from Calgary Economic Development end of year Balanced Scorecard 2022.
95. Data provided by The Calgary Airport Authority
96. CBRE - Calgary Downtown Office Figures Q4 2022
97. CBRE - Calgary Industrial Figures Q4 2022
98. Data from the City of Calgary - East Shepard site (ESDOA).
99. City of Calgary Open Data Portal
100. Data retrieved from FP500 + 800 databases (Top 500 + Next 300 largest corporations). Data are released in August and the data reflects numbers from the previous year. This year, we are reporting on 2021 data as it is the most recent number available.

101. Data retrieved from Calgary Economic Development end of year Balanced Scorecard 2022.
102. Calgary Economic Development External Perceptions Final Report, 2022. Markets surveyed: Canada, U.S., and United Kingdom.
103. Data provided by The City of Calgary.
104. This data was collected by Zinc Ventures, A100, and Platform Calgary and is a Zinc Ventures prototype as part of the Butterfly Collection. Data is current as of February 21, 2023
105. Companies with 5->500 employees
106. Canadian Venture Capital & Private Equity Association (CVCA), Venture Capital Canadian Market Overview, 2022 Year-In-Review report.
107. Rainforest Alberta Calgary 2022 Scorecard Results and Report.
108. Source report refers to sexual orientation as Lesbian/Gay/Bisexual/Queer.
109. Statistics Canada. Table 98-10-0454-01 Occupation (STEM and non-STEM) by visible minority, generation status, age and gender: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts
110. Data provided by Platform Calgary.
111. Canada's Top 100 Corporate R&D Spenders 2022 list, 11 Calgary-based headquartered companies included: Suncor, CNRL Ltd., Imperial Oil Ltd., TC Energy corp., Syncrude, Pason Systems inc., Blackline Safety corp., Computer Modeling Group, Oncolitics Bitotech inc., Acceleware corp., Willow Biosciences inc.
112. Spend in 2021, reported in 2022.
113. Spend in 2020, reported in 2021. 11 companies headquartered in Calgary.
114. Spend in 2019, reported in 2020. Nine companies headquartered in Calgary.
115. Data provided by University of Calgary.
116. Data provided by Bow Valley College on private sector, not-for-profit, and health research partnerships.
117. Data provided by SAIT's Applied Research Division on total industry partnerships in 2022.
118. Data provided by University of Calgary.
119. Growth Catalyst website: <https://www.growthcatalyst.ca/cohorts>
120. Data provided by The Conference Board of Canada
121. Data provided by The City of Calgary
122. Indigenous Tourism Alberta: <https://indigenoustourismalberta.ca/>
123. Calgary Economic Development External Perceptions Final Report, 2022. Markets surveyed: Canada, U.S., and United Kingdom.
124. Calgary Economic Development 2022 Digital Analytics Review. Top five cities for media mentions were 1. Toronto, 2. Calgary, 3. Vancouver, 4. New York, 5. Montreal (cities are determined based on the HQ of the media outlet that published the article). All media mentions focus on Calgary Economic Development and Calgary Economic Development website. Monitoring for Calgary Economic Development specifically as opposed to mentions of Calgary narrows down our data as searching Calgary would be too broad.
125. Calgary Economic Development 2022 Digital Analytics Review. Social media channels include LinkedIn, Twitter, Facebook, Instagram
126. Calgary Economic Development 2022 Digital Analytics Review. The sentiment of an article is determined using a tool that analyzes key themes and subjects of an article and the tonality of the keywords seen



ONE CALGARY

This is an exciting time to be in Calgary and we invite you to be part of the future.

Together, Calgary has grown its global reputation as a great place to make a living and a great place to make a life.

Government, business and community partners all support the mission to advance opportunities to achieve economic success, embrace shared prosperity and build a strong community for Calgary.

We are ready to tackle challenges together and make a global impact.

Economic development is a collaborative effort and all Calgarians play a part.

How will you transform our city?

Take part at CalgaryInTheNewEconomy.com.