



**Calgary
& Region**
Volume 1

Socio-Economic Outlook
**Executive
Summary**

2011-2021



Economic Outlook

Purpose

The City of Calgary monitors and reports on the local economy on a continuous basis. The Economic Outlook is an outcome of this process and is updated four times annually. The intent of these reports is to provide a reference document for Council and Administration to assist in their efforts in financial and physical planning for The City.

This report fills an important information gap on the economics end, as no other publication currently provides a comprehensive analysis of the local economy and society. Several research institutions restrict their analyses to the Alberta economy, but very few analyses and forecasts are available for the urban areas within the province.

Preamble

Public policy measures taken to aid in the economic recovery from the 2008/2009 economic recessions left developed world economies with depreciated public finances and emerging economies with higher inflation rates than pre-recession.

Calgary's economy is not insulated from global market shocks and is sensitive to international energy price movements, especially crude oil price (WTI). WTI price changes have a significant impact on employment in Calgary. Specifically, oil price changes tend to affect the local economy with a four to five month time-lag. This implies that slower global growth would inevitably translate into slower growth in Calgary.

Forecast

City of Calgary

The city of Calgary's population was established at 1.091 million by the April 2011 Civic Census. Calgary's population is expected to reach 1.110 million in 2012 and 1.143 million in 2014 before climbing to 1.256 million in 2021. Calgary's population is projected to increase by 164,839 persons between 2011 and 2021 or by 16,484 persons annually. The annual growth rate is estimated at 1.4 per cent over the period.

Housing starts are expected to total 6,400 units in 2011, down 900 units from 2010 as consumers were adversely affected by tighter mortgage borrowing rules. Over the forecast period, housing starts in the city of Calgary are expected to total 7,500 units in 2012 and trend upwards to 8,000 units by 2016.

The total value of building permits is expected to range between \$3.0 and \$4.5 billion over the forecast period. Employment growth, decreasing vacancy rates for downtown offices and population growth should support demand for new nonresidential and residential space.

Calgary Economic Region

The Calgary Economic Region (CER) is expected to grow by 3 per cent in 2011, up from 2.7 per cent in 2010 and -4.7 per cent in 2009. Increased economic activity in the rest of Alberta should create an increased demand for goods and services from the CER.

Total employment is expected to reach 802,000 in 2012 and 838,000 by 2014, up from 776,000 in 2011. Employment growth should be driven by increased economic activity.

The unemployment rate is expected to average 6 per cent in 2012 and 5.0 per cent in 2014, down from 7 per cent in 2010.

The consumer inflation rate is expected to average 2.4 per cent in 2012, 2.6 per cent in 2013 and 2.2 per cent in 2014. Higher energy prices and increased accommodation costs are expected to increase consumer prices over the forecast period.

Assumptions

The Alberta economy is expected to grow by 2.9 per cent in 2011, down from 3.6 per cent in 2010. A strong Canadian currency and slow economic growth in the U.S. combined to constrain the rate of export growth. This constrained export sector is expected to reduce the overall growth rate in the short-term (2011-2012).

Oil prices are expected to average US\$90/bbl in 2011 and increase to US\$97/bbl by 2014. Crude oil prices are expected to grow in response to increased demand for oil from emerging economies.

Natural gas prices should increase modestly in response to slow growth in the U.S. economy and an abundant supply of natural gas from shale formation.

Canada's real GDP is expected to grow at 2.2 per cent in 2011 and 2 per cent in 2012, before returning to 2.2 per cent by 2015.

U.S. real GDP is expected to grow by 1.5 per cent this year and 1.6 per cent next year, improving to 2.3 per cent in 2013 and 2.5 per cent in 2015.

The world GDP is expected to grow at 3.7 per cent in 2011, and 3.6 per cent in 2012.

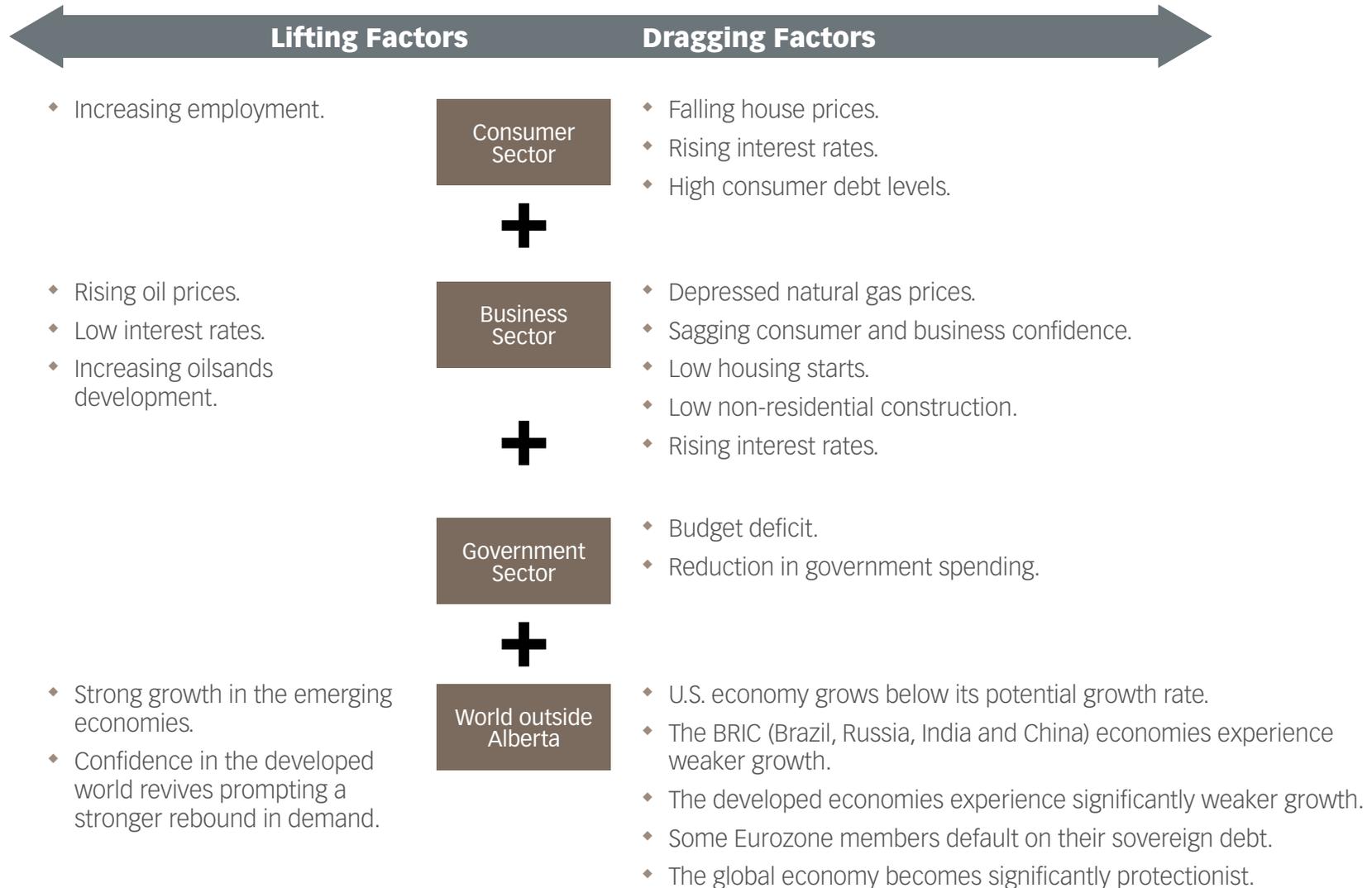
Forecast risks

Forecasts are always subject to both upside and downside risks. In this forecast, the key risks to the Calgary economy are external, and heavily weighted to the downside. Government policies to boost demand and pull the world out of economic recession had the unintended consequence of reducing the policy tools available to deal with slower growth or recession in the near-term.

In the U.S., macroeconomic data has been weak, reflected by insignificant job creation, disappointing GDP growth, flat consumer spending and a depressed housing market. More importantly, severe fiscal problems at the federal and local levels are leading to a serious retrenchment. The anaemic U.S. recovery, following the 2008/2009 recession, has contributed to the global weakness in demand for both Alberta and Calgary exports.

In contrast to most advanced economies, several emerging economies, such as China, India and Brazil, have external surpluses and enjoy excellent public finances. Their challenge is to control the outbreak of inflation by way of tighter monetary policy. In addition, the risk of slower growth in developed economies would have negative effects on emerging economies that rely on exports to those economies. This in turn would result in weaker demand for Alberta's and Calgary's commodities and services.

Forecast risks



Forecast implication

Variable	Direction of Change	Implications for The City of Calgary
Canada		
Gross Domestic Product (%)	2012 should increase over 2010. Canada's economic growth would be constrained by an anaemic U.S. economic performance, a strong Canadian Dollar, slower growth in government and weak consumer spending.	The market for goods and services, in the rest of Canada, from the Calgary Economic Region would increase at a modest pace.
Prime Business Loan Rate (%)	2012-2014 should increase over 2011. The Bank of Canada placed short-term interest rates at extremely low levels in order to boost domestic demand. These rates should increase over the forecast period as the Bank of Canada unwinds the monetary stimulus.	Higher interest service charges should not have a direct effect on The City. However, service providers may pass on higher charges as higher fees to The City.
Government spending	Decrease for several years. Increased government spending was used to counter the recession's negative effects at both the provincial and national levels. Economic stability was incurred at the cost of deficits and increasing debt levels.	The federal and provincial governments have publicly committed to balance their budgets and reduce debt levels through stringent expenditure restraint. Consequently, municipal governments should not expect increases in transfer payments. In fact, reductions in transfer payments may be a distinct possibility.
Alberta		
Crude Oil Price - WTI (US\$/bbl)	World crude oil prices are projected to remain at high levels over time in response to increased demand from the emerging economies.	Producing economies, such as Alberta, would benefit from high prices, which would lead to increased investment. The Calgary economy would benefit from the economic spinoff. Higher prices should improve Transit's relative price competitiveness. Prices for petroleum-based commodities like diesel fuel and bitumen should increase, and this should add to The City's operating and capital costs.
Alberta Natural Gas Price - AECO/NIT (Can\$/GJ)	Natural gas markets have moved into a period of oversupply since the beginning of the 2008/2009 recession. The US recession has resulted in a significant reduction in the rate of growth in the demand for natural gas, particularly in the industrial sector. In addition, the production of shale gas in North America has substantially increased supply.	The net effect of \$1.00 GJ price decrease for natural gas should decrease GDP by \$1.8 billion. In addition, a \$1.00Gj decrease in natural gas prices should cause provincial royalty revenues to decrease by roughly \$1.0 billion. Also, this price decrease results in a decrease in corporate profits of roughly \$250 million. Low natural gas prices would cause City revenue growth from franchise fees to remain weak, assuming all other things are equal.
Government spending	Decrease for several years	The provincial government has publicly committed to balance its budgets and reduce debt levels through stringent expenditure restraint. Consequently, municipal governments should not expect increases in transfer payments. In fact, reductions in transfer payments may be a distinct possibility.

Forecast implication *(continued)*

Variable	Direction of Change	Implications for The City of Calgary
Calgary		
Employment growth (%)	Positive GDP growth in 2012 and beyond should create an increasing demand for labour.	Increased employment should result in an increased demand for non-residential space and this should push the vacancy rate in the office market down to a more sustainable level by 2020.
Population growth	Total population is expected to increase by 165,000 over the next 10 years.	Growth in demand for City services would be shaped by changing demographics. The population projections imply that employers would encounter greater difficulties in hiring younger workers towards the end of the forecast. Pricing of public goods and services may have implications for retired citizens, assuming that they have lower income levels.
Unemployment rate	The unemployment rate would trend downwards over time as labour force growth lags employment growth.	Lower unemployment rates from 2012 and beyond should lead to higher wage inflation, and this should increase The City's operating costs.
Building permits (\$billion)	Building permit values would be driven by growth in the non-residential market. Lower vacancy rates in the non-residential market should support the building of new space.	Growth revenues associated with total building permit values should return to their pre-2007 values in the early stages of the forecast. Building permit values should be boosted by higher employment levels towards the end of the forecast period.
Housing starts ('000 Units)	Grow in line with population change. The level of housing starts is expected to be lower than what was recorded in the 2003–2008 period.	Continued demand for serviced land for residential development. However, the demand for serviced land should grow at rates slower than in the past 10 years.
Non-Residential Building Price Inflation (%)	The inflation rate should increase as labour supply tightens and growth in the emerging economies drives the demand for commodities.	Inflation rates increase over the 2012-2014 period.

Social outlook

After suffering net out-migration and virtually no population growth in 2010, growth resumed in 2011, buoyed by renewed migration, record immigration and a strong birth rate. Growth continues to be accommodated in the new suburbs, with 92 per cent of the city's growth in 2011 going to the developing communities. The downtown and inner city also experienced strong growth, while the established and recent suburbs continued to lose population.

As unemployment rose during the recession, the number of people who are long-term unemployed has also grown along with the number employed in "precarious" work, particularly involuntary part-time work. As the economy recovered, however, job quality across Canada has also risen, with Alberta and B.C. leading the way.

The recession impacted certain groups of people more than others, particularly women, youth, recent immigrants and racialized or Aboriginal persons. As economic growth resumes, those most impacted by the recession in the labour market are starting to experience gains.

The median income of individuals and families dropped during the recession led by declines in retirement income and earnings. Increased income from government transfers helped offset the decline in market income, although social benefit rates remain insufficient to adequately support low-income households.

As incomes deteriorated, poverty rates began to climb after five years of declines. In 2009, the poverty rate in Calgary rose to 11.0 per cent, with 118,000 Calgarians falling below the poverty line. After falling consistently through most of the previous decade, the number of Social Assistance recipients in Calgary rose for the third consecutive year, along with increased demand for assistance from the food bank.

Housing affordability improved in Calgary over the past year, with average apartment rent falling for the second consecutive year, although rent and utility costs remain among the highest of Canadian cities. Meanwhile, vacancy rates are starting to decline with the lowest priced units having the lowest vacancy rates. Expected increases in rental demand in the coming years may once again reduce vacancies and increase rents, while the number of purpose-built rental units continues to fall.

In the face of household income challenges, household savings remain low while debt loads mount, with Canada's debt-to-income ratio reaching a record high. While rising debt levels are contributing to the financial vulnerability of Alberta households, anticipated income gains are expected to be sufficient to enable most households to withstand projected moderate interest rate hikes.

As Canadian society continues to become increasingly diverse, support for multiculturalism and immigration appears to be softening. Albertans report the lowest level of support for multiculturalism and immigration. Meanwhile, many Albertans continue to experience discrimination in daily life, as the number of human rights complaints lodged with the Alberta Human Rights Commission rose for the third consecutive year. Issues of sexual diversity are also emerging as key areas of public debate, and discrimination remains a reality for lesbian, gay, bisexual and transgendered (LGBT) persons, especially youth.

As Calgary's population continues to age, services will be challenged to respond to the needs of an older population. This includes a growing need for accessible housing, transportation and public space, as well as increasing support for older adults to remain in their homes. As the population ages, the number of persons with disabilities will also continue to rise. Although poverty among seniors is declining, financial concerns remain a key issue due to reduced retirement income and inadequate retirement savings.

Calgary's non-profit sector, which provides important social services, recreation and arts and cultural programs and facilities has been impacted by constrained funding. Due to the recent economic recession, many non-profit organizations have experienced reduced government funding, charitable giving and sponsorships, as well as reductions in investment and earned income. This has been exacerbated by simultaneous increases in demand for services, particularly social services, resulting in significant stress for organizations across Canada, with Alberta non-profits reporting some of the highest rates of stress.

Levels of fitness and physical activity among Canadian adults, children and youth are low, and continue to decline, resulting in compromised health. Time, cost and increased sedentary pursuits are limiting participation in physical activities. As most recreation and sport programs and services are delivered by non-profit organizations, the pressures facing the non-profit sector overall are affecting the ability to meet the recreation and fitness needs of a growing population.

Calgary continues to experience a community infrastructure deficit, affecting arts, recreation and community facilities managed by The City, community associations and non-profit organizations. Many of Calgary's current facilities are ageing and require significant life-cycle maintenance and upgrading. Investments in new facilities have also lagged population growth, leading to under-servicing of newer areas. New investments in community infrastructure through the Municipal Sustainability Initiative (MSI) funding are beginning to overcome this deficit.

Calgary continues to be a safe city as perceptions of safety remain high and crime rates continue to fall. Social disorder calls, however, have shown an upward trend. Organized crime also remains a key area of focus, although street gang activity in Calgary has subsided considerably. Safety from injury also continues to improve in Calgary as workplace injuries, traffic injuries and Fire Department and EMS calls for service have all continued to trend downward.

Forecast tables

Table 1: Selected Economic Indicators

Rest of the World, United States, Canada, Alberta, Calgary Economic Region & Calgary CMA										
FORECAST COMPLETED: September 2011										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
ASSUMPTIONS										
Global Economy										
World Gross Domestic Product (annual % change)	2.3	2.9	3.6	4.9	4.5	5.2	5.3	2.8	-0.6	4.4
The United States										
U.S. Real Gross Domestic Product Growth (chained 2005 dollar) (%)	1.1	1.8	2.5	3.6	3.1	2.7	1.9	0.0	-2.6	2.9
Canada										
Canada Real Gross Domestic Product Growth, (chained 2002 dollar) (%)	1.4	2.7	2.1	3.1	2.7	2.8	2.2	0.7	-2.8	3.2
Prime Business Loan Rate (%)	5.8	4.2	4.7	4.0	4.4	5.8	6.1	4.7	2.4	2.6
Exchange Rate (US\$/Cdn\$)	0.65	0.64	0.72	0.77	0.83	0.88	0.94	0.94	0.88	0.97
Alberta										
Gross Domestic Product (%)	2.0	2.2	3.2	5.3	4.5	6.2	2.5	0.0	-2.6	3.6
Total Employment Growth (%)	3.0	2.3	2.8	2.5	1.5	4.5	4.9	2.9	-1.0	0.2
Unemployment Rate (%)	4.6	5.3	5.1	4.6	4.0	3.5	3.5	3.5	6.3	6.6
Housing Starts ('000 Units)	29.2	38.8	36.2	36.3	40.8	49.0	48.3	29.2	20.3	27.1
Inflation Rate (%)	2.3	3.4	4.4	1.4	2.1	3.9	4.9	3.2	-0.1	1.0
Crude Oil Price - WTI (US\$/bbl)	25.9	26.1	31.1	41.4	56.5	66.1	72.3	99.6	61.8	79.5
Alberta Natural Gas Price - AECO/NIT (\$/GJ)	5.2	3.9	6.3	6.2	8.3	6.2	6.1	7.7	3.8	3.8
Alberta Average Wage Rate Increase for All Industries	1.8	2.4	3.4	3.5	5.7	4.6	5.9	6.1	3.3	4.1
FORECAST										
Calgary Economic Region (CER)										
Gross Domestic Product (%)*	1.3	2.6	1.6	4.5	4.9	11.6	4.5	-0.4	-4.7	2.7
Total population**	1,048	1,076	1,096	1,119	1,152	1,188	1,230	1,251	1,296	1,338
Total Employment ('000 Persons)	598	611	623	643	649	718	745	768	765	755
Total Employment Growth (%)	3.8	2.1	1.9	3.1	1.0	10.0	3.8	3.1	-0.4	-1.3
Unemployment Rate (%)	4.5	5.6	5.3	5.0	3.9	3.4	3.2	3.3	6.3	7.0
Inflation Rate (%) (CMA)	2.4	3.7	3.5	1.7	2.0	4.6	5.0	3.2	-0.1	0.8
Building Permits (\$billion)	2.5	2.9	3	3.1	4.3	6.0	7.1	5.1	4.5	3.8
Low Forecast	N/A									
High Forecast	N/A									
Housing Starts ('000 Units) CMA	11.3	14.3	13.6	14.0	13.7	17.0	13.5	11.4	6.3	9.3
Non-Residential Building Price Inflation (%) CMA	3.3	2.2	3.1	6.7	6.9	12.8	17.7	13.7	-7.7	-2.2

Numbers may not add up due to rounding * Source: Centre for Spatial Economics, Corporate Economics ** Total population, census divisions and census metropolitan areas, 2001 Census boundaries

Table 1: Selected Economic Indicators

Rest of the World, United States, Canada, Alberta, Calgary Economic Region & Calgary CMA											
FORECAST COMPLETED: September 2011	BASE FORECAST										
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
ASSUMPTIONS											
Global Economy											
World Gross Domestic Product (annual % change)	3.7	3.6	4.4	4.3	4.2	4.3	4.2	4.1	4.1	4.2	4.3
The United States											
U.S. Real Gross Domestic Product Growth (chained 2005 dollar) (%)	1.5	1.6	2.3	2.5	2.5	2.5	2.5	2.5	2.4	2.4	2.4
Canada											
Canada Real Gross Domestic Product Growth, (chained 2002 dollar) (%)	2.2	2.0	2.3	2.3	2.2	2.2	2.2	2.1	2.1	2.1	2.0
Prime Business Loan Rate (%)	3.0	3.3	4.0	5.0	5.5	6.0	6.5	6.5	6.5	6.5	6.5
Exchange Rate (US\$/Cdn\$)	1.00	0.98	0.98	0.96	0.95	0.95	0.95	0.95	0.95	0.95	0.95
Alberta											
Gross Domestic Product (%)	2.9	2.4	3.0	3.7	3.3	3.4	3.4	3.4	3.4	3.4	3.4
Total Employment Growth (%)	3.0	2.3	2.1	2.4	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Unemployment Rate (%)	5.6	5.2	5.0	4.6	4.4	5.0	5.0	5.0	5.0	5.0	5.0
Housing Starts ('000 Units)	23.7	27.1	26.3	28.0	27.5	24.0	24.0	24.0	24.0	24.0	24.0
Inflation Rate (%)	2.2	2.1	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Crude Oil Price - WTI (US\$/bbl)	90	82	78	97	103	105	108	110	111	113	114
Alberta Natural Gas Price - AECO/NIT (\$/GJ)	4.0	4.0	4.0	5.0	6.0	6.0	6.0	6.0	6.0	6.0	7.0
Alberta Average Wage Rate Increase for All Industries	3.9	3.7	4.3	4.4	3.3	3.3	3.3	3.3	3.3	3.3	3.3
FORECAST											
Calgary Economic Region (CER)											
Gross Domestic Product (%)*	3.0	2.5	3.1	3.5	3.4	3.4	3.4	3.4	3.4	3.4	3.4
Total population**	1,359	1,380	1,399	1,416	1,432	1,449	1,466	1,484	1,502	1,519	1,537
Total Employment ('000 Persons)	776	802	822	838	858	878	893	908	922	937	952
Total Employment Growth (%)	2.8	3.4	2.5	1.9	2.4	2.3	1.7	1.7	1.5	1.6	1.6
Unemployment Rate (%)	6.2	6.0	5.5	5.0	4.5	4.5	4.4	4.0	4.0	4.0	4.0
Inflation Rate (%) (CMA)	2.2	2.4	2.6	2.2	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Building Permits (\$billion)	5.0	4.4	4.4	5.0	5.0	5.0	4.4	4.4	4.4	4.4	4.4
Low Forecast	4.4	3.8	3.8	4.4	4.4	4.4	3.8	3.8	3.8	3.8	3.8
High Forecast	5.6	5.0	5.0	5.6	5.6	5.6	5.0	5.0	5.0	5.0	5.0
Housing Starts ('000 Units) CMA	8.0	9.4	10.0	10.3	10.5	10.0	9.2	9.2	9.3	9.2	9.2
Non-Residential Building Price Inflation (%) CMA	2.4	6.1	1.0	7.7	3.7	2.3	2.0	1.8	1.4	1.6	1.3

Numbers may not add up due to rounding * Source: Centre for Spatial Economics, Corporate Economics ** Total population, census divisions and census metropolitan areas, 2001 Census boundaries

Table 2 - Selected Indicators

City of Calgary																					
FORECAST COMPLETED: September 2011											BASE FORECAST										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
DEMOGRAPHY																					
Total Population ('000 Persons)	877	905	922	933	956	992	1,020	1,043	1,065	1,072	1,091	1,110	1,127	1,143	1,159	1,174	1,190	1,206	1,223	1,239	1,256
Total Population Growth (%)	1.8	3.2	1.9	1.2	2.4	3.7	2.9	2.2	2.2	0.6	1.8	1.8	1.5	1.4	1.3	1.3	1.4	1.4	1.4	1.4	1.3
Net Migration ('000 Persons)	8.0	21.0	9.0	2.3	13.7	25.6	17.6	12.4	12.9	-4.1	9.6	8.0	7.0	7.0	7.0	8.0	8.0	9.0	10.0	10.0	10.0
REAL ESTATE																					
Residential Market																					
Housing Starts ('000 units)	9.9	12.4	11.9	12.2	11.7	14.1	10.9	9.6	5.0	7.3	6.4	7.5	8.0	8.2	8.4	8.0	7.3	7.4	7.4	7.4	7.3
New House Price Inflation (%)	2.5	5.2	5.2	5.5	7.0	43.6	16.2	0.7	-6.7	1.7	0.0	0.0	6.1	3.7	1.1	1.4	1.5	1.3	0.8	0.3	1.4
Total Building Permits mid point (\$billions)	2.0	2.3	2.4	2.4	3.6	4.9	5.6	4.0	3.7	2.9	4.0	3.5	3.5	4.0	4.0	4.0	3.5	3.5	3.5	3.5	3.5
Low Forecast											3.5	3.0	3.0	3.5	3.5	3.5	3.0	3.0	3.0	3.0	3.0
High Forecast											4.5	4.0	4.0	4.5	4.5	4.5	4.0	4.0	4.0	4.0	4.0

Numbers may not add up due to rounding

Table 3: City of Calgary Population Projection

City of Calgary											
FORECAST COMPLETED: September 2011		FORECAST									
(Persons except rates)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total Population (April)	1,090,900	1,110,300	1,127,400	1,143,200	1,158,500	1,174,100	1,190,000	1,206,300	1,222,800	1,239,400	1,255,800
Total Net Migration (May - April)	10,000	8,000	7,000	7,000	7,000	8,000	8,000	9,000	10,000	10,000	10,000
Total Natural Increase (May - April)	10,000	9,000	9,000	9,000	9,000	8,000	8,000	7,000	7,000	7,000	6,000
Total Population Growth Rate (May - April)	1.8%	1.8%	1.5%	1.4%	1.3%	1.3%	1.4%	1.4%	1.4%	1.4%	1.3%
Population by five-year cohort											
(Ages)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
0-4	68,400	72,500	75,900	78,700	81,000	82,500	82,600	82,500	82,300	81,900	81,400
5-9	63,900	64,700	66,100	67,400	68,900	71,000	74,800	78,200	81,200	83,600	85,400
10-14	62,300	62,400	62,700	63,400	64,300	65,300	65,900	67,300	68,700	70,300	72,500
15-19	66,000	65,000	63,900	63,400	63,400	63,500	63,500	63,900	64,700	65,700	66,700
20-24	78,200	75,800	73,700	72,000	70,100	68,300	67,200	66,200	65,900	66,000	66,300
25-29	93,400	93,600	91,900	88,900	85,700	82,700	80,200	78,200	76,900	75,400	73,900
30-34	89,800	91,900	94,400	96,400	98,300	99,500	99,300	97,700	95,200	92,500	90,000
35-39	93,700	93,900	93,800	94,000	94,700	95,200	97,000	99,500	102,000	104,300	105,900
40-44	88,300	90,900	93,400	95,400	96,400	97,600	97,500	97,400	97,900	98,900	99,800
45-49	87,200	87,900	88,100	88,200	89,000	90,400	92,800	95,400	97,500	98,700	100,100
50-54	81,300	83,000	84,400	86,100	87,200	87,800	88,400	88,500	88,700	89,600	91,100
55-59	63,700	67,100	70,600	73,200	75,700	78,100	79,700	81,000	82,600	83,800	84,400
60-64	48,100	50,900	52,100	53,900	56,600	59,300	62,300	65,600	68,100	70,500	72,700
65-69	34,900	36,300	39,100	41,700	43,900	46,100	48,700	49,900	51,700	54,200	56,700
70-74	24,700	25,900	27,300	29,000	30,800	32,600	33,800	36,400	38,900	40,800	43,000
75-79	19,200	19,500	19,800	20,200	20,900	21,800	22,900	24,100	25,600	27,200	28,700
80-84	14,500	15,000	15,400	15,600	15,600	15,600	15,900	16,200	16,500	17,100	17,800
85-89	8,400	8,600	8,700	9,000	9,400	9,700	10,100	10,300	10,400	10,400	10,400
90+	4,600	5,300	5,900	6,300	6,700	7,000	7,400	7,800	8,200	8,600	9,000
Total	1,090,900	1,110,300	1,127,400	1,143,200	1,158,500	1,174,100	1,190,000	1,206,300	1,222,800	1,239,400	1,255,800

UPDATED BY CORPORATE ECONOMICS, September 2011

Social outlook data

Total Immigrant Landings, Calgary and Canada

	2006	2007	2008	2009	2010	Percent Change	
						2006-10	2009-10
Calgary	11,635	10,972	12,689	13,708	16,103	36.2%	17.5%
Canada	251,653	236,754	247,243	252,124	280,681	11.5%	11.3%
% of Canada	4.6%	4.6%	5.1%	5.4%	5.7%		

Source: Citizenship and Immigration Canada (2011).

Total Income of Individuals (\$2009), Calgary CMA

	2005	2006	2007	2008	2009	Percent Change	
						2005-09	2008-09
Average income	43,000	47,400	50,700	48,900	50,100	16.5%	2.5%
Median income	31,600	33,100	34,500	35,600	35,100	11.1%	-1.4%

Source: Statistics Canada (2011). Income of Canadians. 1980-2009.

Percentage of Persons in Low Income (Pre-Tax) by Age, Calgary (CMA)

	2005	2006	2007	2008	2009	Percent Change	
						2005-09	2008-09
All persons	12.7	11.4	9.5	8.9	11	-1.7	2.1
Persons under 18 years	16.4	12	10.2	9.7	10.2	-6.2	0.5
Persons 18 to 64 years	12	11.5	8.9	8.3	11.3	-0.7	3
Persons 65 years and over	9.2	9.4	12.6	11.5	10.7	1.5	-0.8

Source: Statistics Canada (2011). Income of Canadians. 1980-2009.

Selected Housing Indicators, Calgary

	2006	2007	2008	2009	2010	Percent Change	
						2006-10	2009-10
Private rental market apartment vacancy rates (CMA)†	0.5%	1.5%	2.1%	5.3%	3.6%		
Average monthly rent for all unit types (CMA) †	\$851	\$974	\$1,031	\$991	\$969	13.9%	-2.2%
Total private market rental apartments (CMA) †	40,333	38,150	36,858	35,737	35,512	-12.0%	-0.6%
Home ownership rate in Calgary (city) ††	71.6%	71.7%	71.1%	70.6%	70.7%		

Sources: †Canadian Mortgage and Housing Company (2010). Rental Market Report Calgary. †† City of Calgary (2010). Civic Census 2010.

Household Charitable Contributions, Calgary (CMA)

	2005	2006	2007	2008	2009	Percent Change	
						2005-09	2008-09
Percent of Households with Contributions to Charity	76.6%	80.0%	72.1%	65.9%	68.0%	-8.6%	2.1%
Average Charitable Contribution per Household Reporting Contributions	1,219	1,307	1,381	944	1,628	33.6%	72.5%

Source: Statistics Canada (2011). Survey of Household Spending.

Person and Property Crimes, Calgary

	2006	2007	2008	2009	2010	Percent Change	
						2006-10	2009-10
Person Crimes							
Rate / 100,000	903.2	799.4	800.3	797.7	826.5	-8.5%	3.6%
Number of offences	8,958	8,153	8,346	8,499	8,858	-1.1%	4.2%
Annual % chg	-3.3%	-9.0%	2.4%	1.8%	4.2%		
Property Crimes							
Rate / 100,000	5,419.1	5,118.6	4,768.0	4,304.8	4,056.0	-25.2%	-5.8%
Number of offences	53,744	52,207	49,726	45,866	43,461	-19.1%	-5.2%
Annual % chg	1.8%	-2.9%	-4.8%	-7.8%	-5.2%		

Source: Calgary Police Service (2011). Annual Statistical Report.

Executive Summary of Calgary and Region Socio-Economic Outlook

For more information

Statistical data and interpretation
of trends described in this
Executive Summary are included in:

Volume 2:

Economic Outlook
2011-2021
www.calgary.ca/economy

Volume 3:

Social Outlook
www.calgary.ca/cns

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