

## **GROWTH MONITOR OVERVIEW**

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### **Introduction**

Calgary is one of the most dynamic and fastest growing cities in North America. Understanding the scope of that growth, and its impact on the lives of Calgary's citizens, is a primary goal of this report. The Growth Monitor is a report designed to inform, educate and inspire corporate and civic leaders to think strategically about the direction of the City's growth and the important role public opinion plays in shaping decisions made by the citizens and consumers who call Calgary home. It attempts to put Calgary's development into a provincial and national perspective – since many of the challenges and opportunities presented by rapid growth can only be addressed in concert with decision makers at the Provincial and Federal levels.

The series of Growth Monitor reports we will be producing are not merely static documents. We intend to work closely with our clients, subscribers and industry and business leaders of this report to examine issues of importance as they emerge over time in a balanced and thoughtful manner. Ultimately, we believe that decision makers faced with the challenge of responding to Calgary's phenomenal growth require – more than ever – a concise insightful source of information and analysis.

President, Cameron Strategy Inc.

CAMERON  
STRATEGY

## Section 1:

# Calgary: The Urban Engine at the Heart of Alberta's Growth

## Calgary Within the Alberta Context

### COMMENT

"The Calgary-Edmonton corridor is in a unique position in Canada. Specifically, it is the only Canadian urban centre to amass a U.S level of wealth while preserving a Canadian-style of life. At nearly \$40,000(US), GDP per capita is about 10% above the average of U.S. metropolitan areas, and a striking 40% above its Canadian colleagues."

"The Calgary-Edmonton Corridor: Take Action Now to Ensure Tiger's Roar Doesn't Fade."TD Economics, April 22, 2003

Between 1971 and 2002, Alberta experienced the highest population growth rate among all Canadian provinces<sup>1</sup>. With 87% growth over this 22-year timeframe, the province has now surpassed three million in population.

Like most of Canada, four in five residents are urban dwellers<sup>2</sup> - the majority of which live in the Calgary-Edmonton Corridor. The Corridor has come under increasing scrutiny due to the tremendous economic population growth and prosperity.

While much has been made of the flourishing economies linked by Highway 2 from Edmonton to Calgary, the concentration of growth in Calgary – and the related challenges that entails – has often been overlooked.

Calgary and Edmonton as respective anchors of prosperity only occupy 2.3% of the total area of the province, yet they are home to 63.5% of the population<sup>3</sup>. They are more ethnically diverse and attract more new immigrants relative to the rest of the province<sup>4</sup>. However, on key indicators of growth, Calgary stands out dramatically from its northern neighbour.

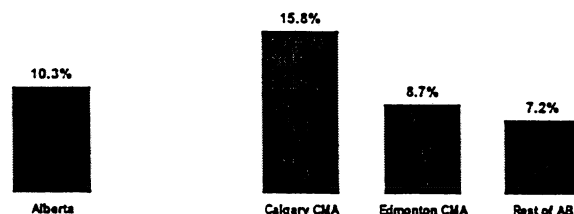
## The Calgary Engine: Speeding Ahead

Over the period 1966 to 2001, Calgary's metropolitan population grew by 188%<sup>5</sup>. Over the same timeframe, Edmonton was the second fastest growing Census Metropolitan Area (CMA) in the country at 134%. Even looking at population growth within recent times<sup>6</sup>, from 1996 to 2001, Calgary's growth exceeded the provincial average (15.8% vs. 10.3%), and was almost twice as high as Edmonton (CMA, 8.7%) and the rest of the province (7.2%).

In fact, half of the population growth in Alberta over that five-year period occurred in Calgary (46.7%). The city also experienced the highest level of net internal migration within Canada – 57,010 individuals between 1996 and 2001 – almost twice as high as second ranked Edmonton<sup>7</sup>. The city also received 76% more new residents from other countries compared to Edmonton<sup>8</sup> (1996 to 2001: 42,420 vs. 24,100, respectively).

### Population Change in Alberta

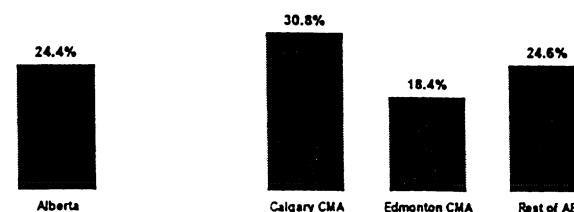
#### Population Growth 1996-2001



Source: Statistics Canada, Census Data

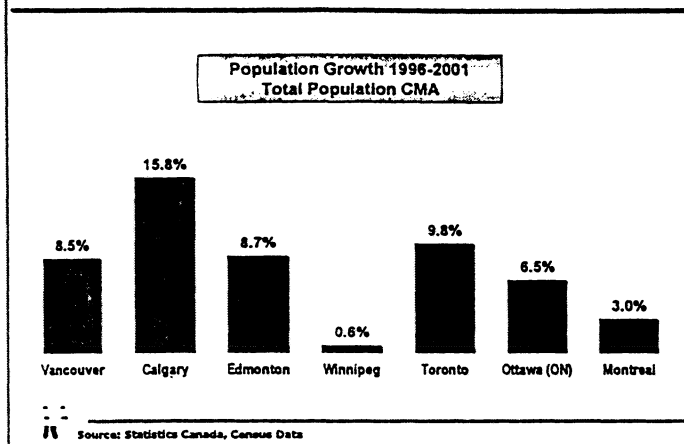
### Growth in Dwellings in Alberta

#### Dwelling Growth 1991-2001



Source: Statistics Canada, Census Data

## Population Growth Across Key Urban Centres



Among Canada's CMAs, Calgary had the highest growth rate over the period 1992 to 2002<sup>9</sup>. Calgary is now Canada's fifth largest CMA and will be the first city between Toronto and Vancouver to cross the one million population mark – based on a projected annual growth rate of 1.7% over the next five years<sup>10</sup>.

## Defying Perceptions: From Cowtown to Cosmopolitan City

**Calgary is a diverse city:** With 17.5% of its population identifying themselves as a visible minority, Calgary is the fourth most ethnically diverse CMA in Canada<sup>11</sup>. The city also has the fourth largest foreign-born population<sup>12</sup> and over one in five speak a language other than English or French<sup>13</sup>. In terms of religion, over one in four Calgarians claim to have "no religious affiliation" – 50% higher than Toronto and more than three times as high as Montreal<sup>14</sup>.

**Calgary is a creative city:** Calgary, among North American cities with a population between 500,000 and one million, was ranked second in terms of creativity<sup>15</sup>, behind Austin, Texas. Among Canadian CMAs, Calgary has the fourth largest proportion of undergraduate degrees or higher, the fifth highest incidence of individuals in artistic/creative occupations, as well as being ranked fifth in terms of its share of employment in high-tech employment<sup>16</sup>. Beyond this, Calgary is home to the EPCOR Centre for the Performing Arts – one of three major arts centres in Canada and the largest one of its kind in Western Canada.

**Calgary is an affluent city:** Calgary has the fourth highest average level of earning (\$36,851) among

Canada's CMAs<sup>17</sup>. In fact, the city has the highest incidence (4.9%) of earners making \$100,000 or more a year. With the average cost of a home over \$200,000<sup>18</sup>, after Vancouver and Toronto, it has become one of the pricier cities in Canada to buy a dwelling.

**Calgary is a dynamic city:**  
The face of Calgary is rapidly

changing. Almost one in five residents have been in the city five years or less<sup>19</sup>. These newcomers are predominantly in the 25 to 34 year age group, have young and pre-teen children and are better educated<sup>20</sup> and, earn as much as longer-term residents. This is reinforced by the fact that the city has one of the lowest average ages (34 years) and dependency ratios (40.1%) among major urban centres across Canada.

## COMMENT

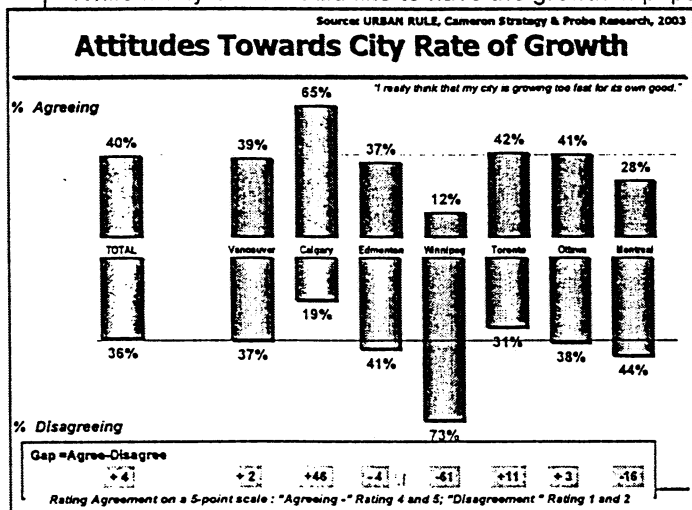
\* World's Top Intelligent Community Award – 2002. Calgary's efforts to provide access to technology for Calgarians in need was recognized by the Intelligent Community Forum. Among dozens of cities considered in the world, Calgary shared the honour of World's Top Intelligent Community for 2002 with Seoul, South Korea.

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### Challenges of Growth: Addressing Concerns & Nurturing Expansion

While Calgarians consider that they have a very high quality of life<sup>21</sup> and are optimistic about the economic future of the city<sup>22</sup>, growth continues to strain the city's resources.

While many cities would like to have the growth in population Calgary has experienced, many

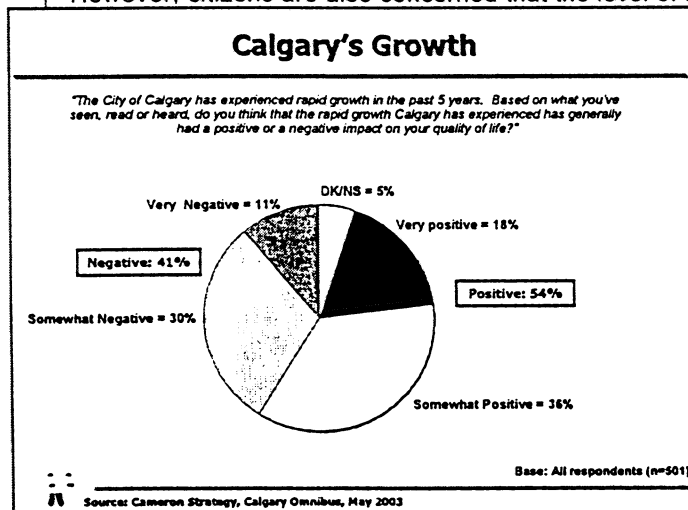


residents (65%) think that Calgary "is growing too fast for its own good"<sup>23</sup>. With a 31% increase in dwellings between 1991 and 2001<sup>24</sup> – the highest growth among Canadian CMAs – it is not surprising Calgarians feel this way. Recent tracking<sup>25</sup> indicates that 41% of Calgarians feel that the rapid growth over the past five years has had a negative impact on their quality of life.

In fact, concerns about mobility issues have been dominating the public agenda in Calgary for the past three years. Transportation capacity has not kept pace with the tremendous rapid growth that has occurred since 1991. Only within the last few years did the

city initiate large-scale investment in Calgary's transportation network. However, the majority of residents still cite mobility as their number one concern, and they believe that the money currently being spent to address this issue is clearly insufficient<sup>26</sup>.

However, citizens are also concerned that the level of investment in education and healthcare is insufficient<sup>27</sup>. In terms of education, the TD Report<sup>28</sup> acknowledges that Alberta lags behind other provinces in the share of high school students moving on to post-secondary education.



The city's healthcare system is also showing signs of stress – this year there were recently two evenings when hospital departments were unable to accept any patients. Beyond this, many residents have difficulty finding a family physician and the prevalence of medical specialists are low for a city with a medical faculty and a rapidly growing population.

Quality of life, though rated highly, is being further affected by the rise in the homeless and the lack of affordable housing – the latter a critical factor in supporting the City's growing service sector.

Calgary is an optimistic city. The quality of life is rated very highly and the perceived value received for municipal tax dollars is higher here than any other major city in the country. Nevertheless, the extent of growth occurring demands greater attention from higher levels of government are required to ensure the benefits of such growth are sustained and beneficial to the residents of the region as a whole.

## SECTION 2: MOBILITY

### Mobility is Calgarians' Top Concern

The #1 issue facing Calgary for the last 3 years.

Since 2000, matters of mobility have been the top concern of residents.

Tracking indicates that a majority of residents feel that infrastructure; traffic and roads are the top issues facing the city today. In fact the only other issue to cross a level of 30% mentions was city transit - yet another mobility issue.

This concern is primarily a Calgary issue. Mobility concerns do not register at even 10% mentions for the rest of the province<sup>29</sup>. Healthcare is the primary concern for Alberta's residents outside of Calgary. However, neighbouring communities – for example, the

majority of Airdrie's residents<sup>30</sup> (54% in 2002) – also think that infrastructure, traffic and roads are the most important issues facing their city.

The perception is clear – mobility is a major stress, and its level of concern is like no other across the country. With an estimated 50 more cars starting to travel on Calgary's network each day<sup>31</sup>, the city's growth is anticipated to keep infrastructure concerns prominent for some time.

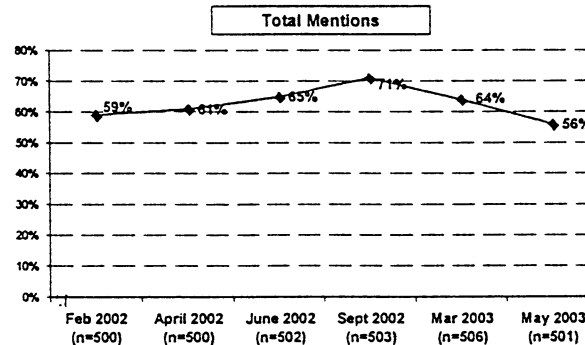
### Exploring Calgarians' Mobility Concern

Between 1996 and 2002 Calgary's population grew by 18.0%.<sup>32</sup> During this time frame the kilometres of roads increased by 10.6% and the kilometres of bus routes grew by 72.7%.<sup>33</sup>

If these transportation measures were viewed on a per 100,000 population basis, it would appear that kilometres of bus routes have kept pace and exceeded growth (+46.4%), while kilometres of roads has actually declined (-6.3%). Thus, it is not surprising citizens feel

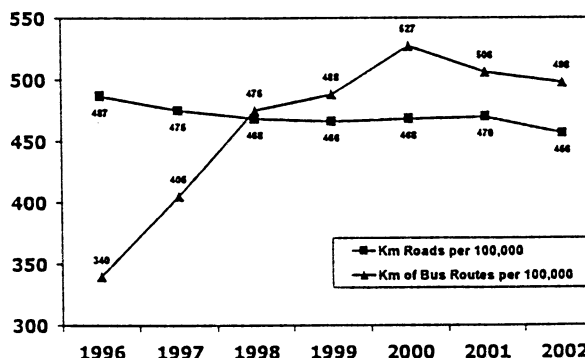
that there is an "infrastructure deficit" in Calgary.

#### Prominence of Infrastructure/Traffic/ Roads as a Key Issue in the City of Calgary (2002-2003)



Source: Cameron Strategy, City Omnibus

#### Roads & Bus Route Servicing per 100,000 population



Source: City of Calgary

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### COMMENT

How Calgary has grown ...

1970, Calgary had:

- Approximately 400,000 residents
- Covered 404 km<sup>2</sup>
- 2,800 lane kilometres of paved roads
- 144,000 vehicles

In 2001, the city now has:

- Nearly 900,000 residents (now over and approaching one million)
- Covers 720 km<sup>2</sup>
- Over 12,000 lane kilometres of paved roads
- 356,000 vehicles

Source: State of the City Address, 2002

### COMMENT

*"An eroding transportation system and congestion could soon lead to cost in the hundreds of millions of dollars in lost time and impact trade flows, not to mention and increasing toll on the health of the residents."*

*"The Calgary-Edmonton Corridor – Take Action Now to Ensure Tiger's Roar Doesn't Fade," TD Economics, April 22, 2003*

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### COMMENT

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**"The Calgary-Edmonton Corridor – Take Action Now to Ensure Tiger's Roar"**

### COMMENT

*In a recent study of Western Canadians, respondents were asked if they agreed with the statement "Western Canada has the transportation system it needs to compete in global markets". A small majority of Western Canadians agree with this statement, but over four in ten disagree."*

**"Looking West 2003 – A Survey of Western Canadians", Canada**

Since 1997, The City of Calgary has conducted an annual Citizen Satisfaction Survey<sup>34</sup>. Four measures of mobility are tracked – transit, conditions of major streets and roadways, and traffic during and outside rush hour. On all measures there have been steady declines in performance ratings over the tracking period, with the downward trend receding somewhat only recently. With a number of interchange projects, road upgrades and transit extension projects launched and continuing, such initiatives have taken traction in the minds of Calgarians.

### Service/Infrastructure Ratings 2003

Service	Satisfaction	Importance	Gap (Satisfaction/Importance)
Transit	63%	85%	-22
Traffic flow outside of rush hour	58%	48%	+10
Condition of major streets and roadways	49%	73%	-24
Rush hour traffic flow	22%	84%	-62

Upon review of satisfaction/importance gaps, unmet needs of citizens are clear. With the exception of traffic flow outside of rush hour, which is of relatively low importance, there are significant gaps in the importance of these infrastructures and citizen's performance rating. Rush hour traffic flow of all measures evaluated has the largest gap – emphasizing the importance of commuting to Calgarians.

While mobility has generally been localized to Calgary due to growth, the constraints of the existing system appear to be permeating other concerns in the minds of residents.

## Mobility and Urban Sprawl

Mobility concerns have encouraged The City of Calgary to invest over \$1 billion over 2002 to 2007<sup>35</sup> to shorten commuting times<sup>36</sup> and more capacity for a higher volume

of rush hour traffic. A recent report<sup>37</sup> suggests that Calgary's approach to traffic problems could have a negative effect on the City's attempt to intensify its inner city population<sup>38</sup>:

*"Making commuting easier by investing large sums of civic money into major arteries into the downtown core can only serve to encourage developments in the far reaches of the city by reducing the time costs associated with longer commutes."*

The "Tightening our Beltways" report also discussed the option of public transit.

*"Public transit is often suggested as an option to decrease the strain on transportation infrastructure in cities. Unfortunately, the effectiveness of public transit depends on the population density of the community that it serves."*

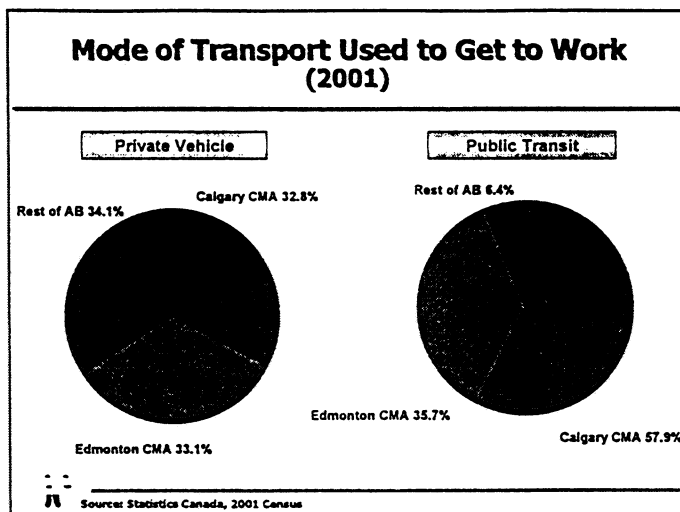
At this point, Calgary's density is 187 persons per km<sup>2</sup>, while Edmonton is 100 persons per km.<sup>239</sup>

Calgary's mobility issues are intricately linked to the development of the city, and this emphasizes the need to grapple with city growth through a coordinated approach using policy, infrastructure, as well as shifting behaviour and attitudes towards options of more local workplaces and intensive residential land-use.

## Getting to Work: Almost 3 in 5 of Alberta's Public Transit Commuters live in Calgary.

Alberta has 1.4 million people who commute to work<sup>40</sup>, of which 83% use a private vehicle and 8% use public transit.

Though still the majority, the proportion of commuters using a private vehicle in Calgary (79%) is less than the proportion for the province as a whole. When public transit is considered, Calgarians (13%) use this mode of travel, which is well above the provincial average. In fact, 58% of all regular commuters who reside in Alberta, reside in Calgary.



### COMMENT

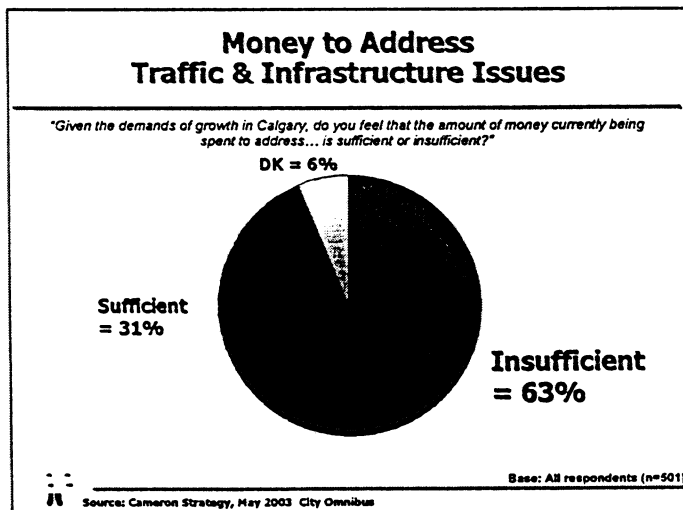
*In 2002, 35,000 more hours of service were added to Calgary Transit's schedule. More buses and routes helped carry a total of 77 million passengers in 2002.*

*Innovative Calgary transit programs increased transit use. For example, the Universal Pass ("U-Pass") was available to SAIT and University of Calgary students and staff through annual student and faculty fees. For SAIT the program has had the benefit of decreased demand for parking, as well as traffic congestion and illegal parking in adjacent communities has also declined.*

Sources: The City of Calgary 2002 Annual Report and City of Calgary City Vision Newsletter, Fall 2002

## Demands of Growth: Not enough Money to address Traffic & Infrastructure Issues.

Recent research<sup>41</sup> indicates that almost two-thirds (63%) of Calgarians feel that the amount of money currently being spent to address traffic and infrastructure issues is insufficient.

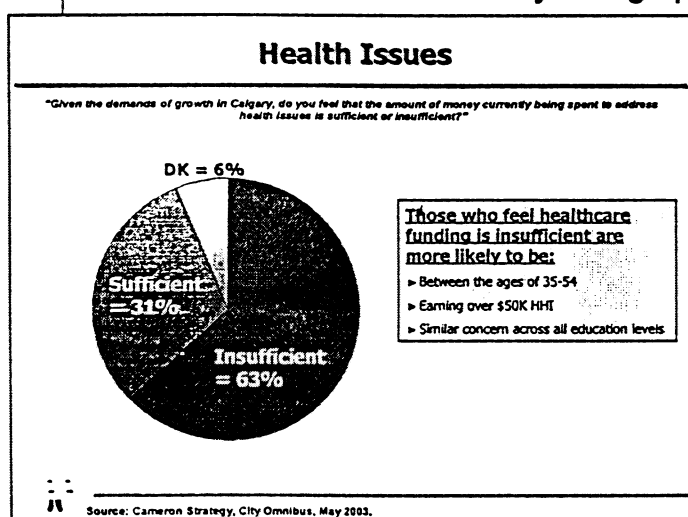


## SECTION 3: HEALTHCARE

### Healthcare: Bursting at the Seams

#### Calgary's Population and Healthcare System – Gaps Need to be Addressed

Calgarians' perspective on healthcare: Almost two-thirds of residents feel that the amount of money being spent to address health issues is insufficient.



Recent research indicates that almost two-thirds of Calgarians feel that the amount of money being spent to address health issues is insufficient. This group outnumbers those who feel that current funding is sufficient by a ratio of 2 to 1. While this sentiment of insufficiency is consistent over most demographic segments, it is more so among middle-aged individuals (35-54 years) and households earning over \$50,000 per year<sup>42</sup>.

#### COMMENT

"Perhaps not surprisingly, 13 of the top 20 communities in this year's ranking are university cities with medical schools – precisely where you'd expect to find superior services".

Maclean's Magazine,  
June 16, 2003.

#### Relative Ratings of CHR: Good but some serious areas of concern.

In a recent Maclean's Magazine (June 16, 2003), 57 health regions were rated on their ability to delivery key medical services<sup>43</sup>. Data were analyzed over six (6) broad categories: outcomes, health resources, community health, elderly services, pre-natal care and service efficiencies.

The Capital Health Region was ranked as the top health authority, while Calgary was ranked seventh. Of the 18 indicators analyzed, the Capital Health Region performed better than Calgary on 12 of those indicators. A difference that is surprising given the predominance of these two cities in Alberta.

Looking at the individual rankings by each evaluation categories, the Calgary Health Region performed exceptionally well in outcomes and efficiencies. However, it had relatively weak resources, community health and elderly services ratings – the former two likely a result of stresses due to under servicing a rapidly growing population.



## Calgary's Population Explosion: Opportunity or Strain?

Calgary is one of the fastest growing cities in Canada<sup>44</sup> - over 1996 to 2001, the CMA population grew by 15.8%. And it continues to grow rapidly. Over the same timeframe it had the highest growth in net internal migration (twice as high as the next highest - Edmonton) and the fifth largest recipient of people who moved from other countries among country's 25 CMAs. While this has contributed to unprecedented growth<sup>45</sup>, it has also presented challenges to the city's healthcare system.

From 1997 to 2002<sup>46</sup>, the population serviced by the Calgary Health Region increased by 15.2% - almost double the rate of the Capital Health Region, which grew by 8.0%. Collectively, these two regions service approximately 60% of Alberta's population - over this five-year period, Calgary's service population share grew from 30.7% to 32.1%, while Capital's share dropped slightly from 28.4% to 27.9%. The other 40% of Alberta's population is serviced by 15 other Regions, with no Region's service population exceeding 6.3% of the total population. Calgary, in sheer

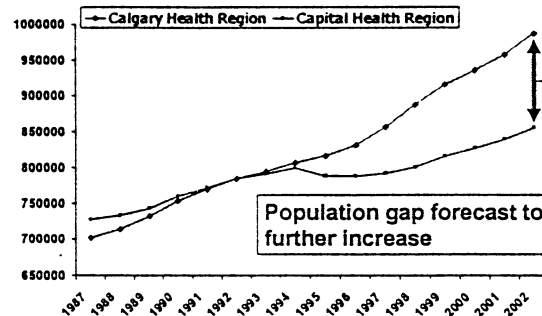
volume, is taking on a disproportionately larger brunt of the growth in service population.

Calgary, with its relatively youthful population has one of the lowest dependency ratios among major metropolitan areas in the country<sup>47</sup> at 40.1%<sup>48</sup>. While this may bode well for reduced healthcare servicing (i.e. a younger, healthier population), rapid growth has challenged the Region in providing resources and key specialized services and critical (mostly) preventative community health initiatives.

## A Strain on Resources: Less Family Physicians and Specialists

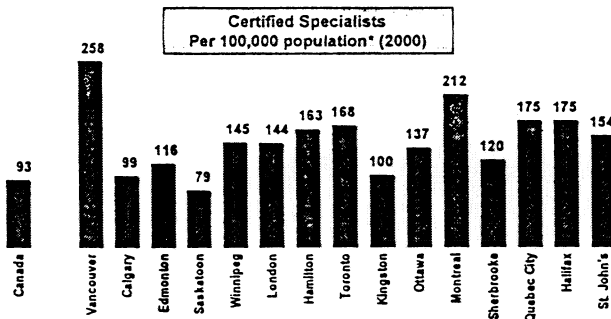
Considering Calgary is a major urban centre with a medical school, it is relatively poorly serviced in terms of family physicians and medical specialists. Calgary has 89 family physicians per 100,000 residents while the average for Canada is 95. Edmonton has 106. Over the past two years<sup>49</sup>, the economic climate of Calgary has attracted about 200 additional physicians. While this has addressed some concerns, population growth still presents a challenge.

### Population Changes: Calgary and Capital Health Regions



Source: Alberta Health & Wellness, April 2001 Boundaries

### Certified Medical Specialists in Key Urban Centres with Medical Schools



\*Urban regions identified are mostly within larger health regions. It is assumed that centres identified are the primary service provider for the region at large. (Source: 2003 Health Indicators, CIHI)

### COMMENT

"There's always going to be difference in services between bigger centres and remote regions. It doesn't make sense to put some of the highly specialized services in communities without the population base to support them."

Jennifer Zelmer, Vice President  
Research & Analysis,  
Canadian Health Information

### COMMENT

92.9% of Calgary Health Region's population is urban based, while the proportion in the Capital Health Region is 90.4%. The rate for Alberta as a whole is 80.7%.

Source: Statistics Canada 2001 as referenced in 2003 Health Indicators, Canadian Institute for Health Information.

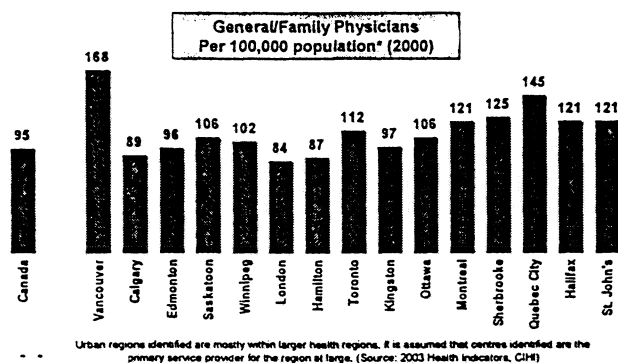
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### COMMENT

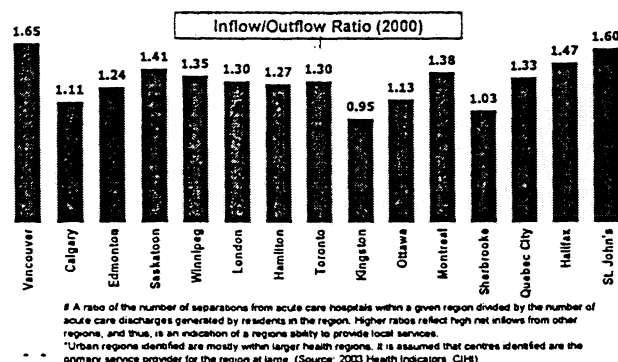
While residents are satisfied with The City of Calgary's emergency Medical Services (EMS), its "very good" rating as declined from 61% to 54% over the last two years. In fact, the EMS overall satisfaction rating was 89% ("good" and very good"), while its importance rating was 97%. This indicates perceived unmet needs with this service."

City of Calgary 2003 Citizen Satisfaction Survey, Cameron Strategy, May 2003.

### General/Family Physicians in Key Urban Centres with Medical Schools

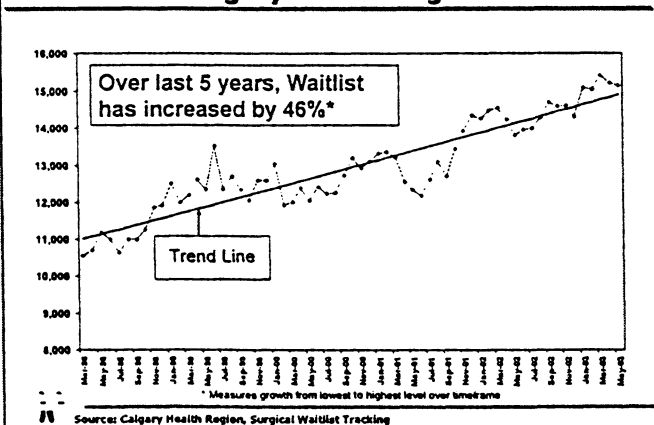


Where specialists are considered, Calgary at 99 per 100,000 residents, is slightly above the Canadian average (93), but has a lower proportion than Edmonton (116). On this front, Calgary fares less well, especially when compared to Winnipeg, Hamilton, Quebec City and Halifax, where the per 100,000 servicing with specialists is about 50% or higher. This also emphasizes a symbiotic constraint between Calgary's healthcare and medical education system.



Inflow/outflow ratios are considered as the key measure of a region to provide a range of local services – the higher the ratio, the better it is to service a local population. Calgary's ratio is 1.11, while Capital Health Region's ratio is 1.24. The ratio for the majority of regions within urban centres with medical schools was 1.30. This indicates that there are constraints within the Region's ability to serve its (growing) population relative to other urban centres. This is best exemplified with growth in the number of individuals on the surgical wait list in the region – 46% growth over the past five (5) years.

### Number of Individuals on The Surgical Waitlist Calgary Health Region



As of March 2003, Calgary had 6,520 beds within its Region for long term and acute care. This translates to 660 beds per 100,000 residents. Since March 2000, this level of beds per 100,000 persons has increased by 2.4%. A lower rate of growth compared to the Region's population that grew by 7.7% over the same period.

## Strain on Community Health: Outreach is limited

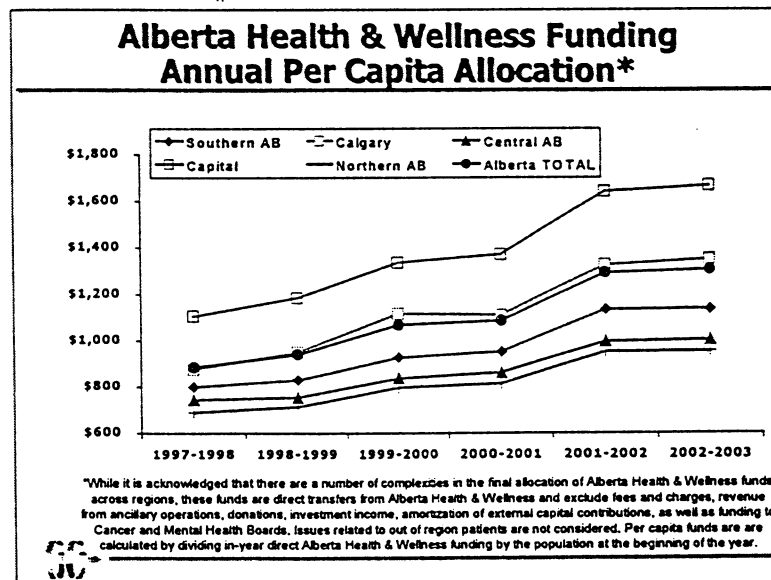
Community health programs are critical for educating people as to the means to manage their health better, and minimize risks of entry into the formal healthcare system. Hospitalization rates for persons 65 years or older for hip fractures are considered one of the best indicators of the success of preventative-care and health awareness programs.

Calgary, with a hip fracture hospitalization rate<sup>50</sup> at 622 per 100,000, was ranked 42 out of 57 health regions in the Maclean's Magazine Study. This was the lowest rating for the Region among the indicators evaluated. This is higher than the Alberta (592) and Canadian (575) rates, and significantly more than the rate for the Capital Health Region (516).

## Addressing the Funding Gap: Calgary's Funding Rates Should Be On Par with Capital Health Region.

Over the last two years (2001-2002), it was estimated<sup>51</sup> that per capita total health care expenditures will be above the national average (Alberta - \$3,761; Canada - \$3,572). However, in 2000, as a percent of GDP, Alberta expenditures were the lowest among all provinces (% of GDP, 2000: Alberta - 6.6%; Canada - 9.1%). In terms of use of funds, per capita provincial expenditures for capital and other health expenditures exceeded the Canadian average (2002: Alberta - \$725 vs. Canada \$565). However, per capita funding levels for institutional services, professionals' services and drugs were below the national average.

To address these gaps, the Province has increased its funding<sup>52</sup> by 25% over the past two years (from \$3.21 billion in 2000/01 to \$4.01 billion in 2002/03). However, such funding has not fully addressed the demands of growth in Calgary's health system. In 2002-2003,



while the Calgary Health Region served 32.1% of the province's population, it received 33.2% of Alberta Health and Wellness funding<sup>53</sup> The Capital Health Region serviced 27.9% of Alberta's residents and received 35.5% of the funding.

When considered on a per capita basis, the Calgary Health Regions funding level has been in line with the Provincial level. However, it has been consistently funded at a level lower than the Capital Health region – even if this does correct for regional redistribution<sup>54</sup>.

## CAMERON STRATEGY

### SECTION 4: POST-SECONDARY EDUCATION

#### Education Demand Outstripping Capacity

##### COMMENT

Almost half of all FLE post-secondary enrolment in Alberta was absorbed by Calgary – the largest shares by U of C and SAIT.

Alberta's growth in post-secondary enrolment was among the highest in the country in recent times.<sup>55</sup>

**Table #1:**  
Full Load Equivalent (FLE) Enrolment Growth (as a % of Total System Growth in Alberta) from 1994-95 to 1999-2000

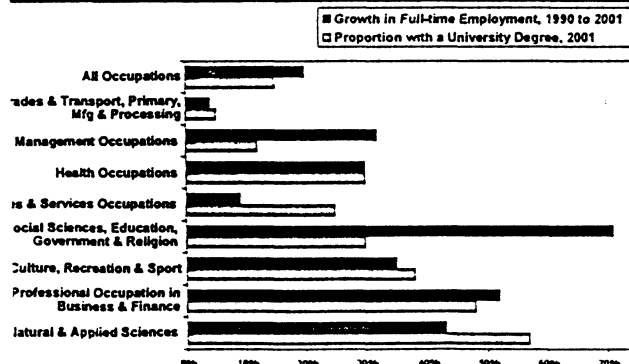
Institution	Location	Difference as a % of Total Growth (FLE)
<b>TOTAL FLE SYSTEM GROWTH IN ALBERTA</b>		<b>100</b>
ACAD	Calgary	1.2
Bow Valley College	Calgary	-7.1
Mount Royal College	Calgary	10.0
SAIT	Calgary	16.1
University of Calgary	Calgary	25.5
<b>Calgary Total</b>		<b>45.7</b>
Concordia University	Edmonton	-0.4
Grant MacEwan College	Edmonton	15.5
NAIT	Edmonton	15.0
NorQuest College	Edmonton	-18.2
The King's University College	Edmonton	0.4
University of Alberta	Edmonton	12.4
<b>Edmonton Total</b>		<b>24.6</b>
<b>Rest of Alberta Total</b>		<b>29.7</b>

Source: Alberta Learning, *Profile of Alberta's Adult Learning System: A Context for Discussion*, Adult Learning System, 2001

Between 1994 and 2000, Alberta's growth in full-time college enrolment was the largest in Canada. Alberta was also one of the only two provinces in Canada to experience significant increases in full-time university enrolment.<sup>56</sup> Specifically, Calgary received the largest full load equivalent (FLE) enrolment growth (as a percent of total system growth in Alberta) from 1994-95 to 1999-2000 at 46%, while Edmonton experienced only about half of Calgary's enrolment growth for the same period<sup>57</sup>.

Although Alberta's post-secondary education is feeling the strains of growth, Calgary is taking the brunt of this stress. For example, from 1995 to 2002 the University of Calgary absorbed 25 per cent of all post-secondary enrolment growth

#### The Fastest Growing Occupations Require the Most Education



Source: AUCC: *Trends in Higher Education and their Policy Implications*, October 23, 2002, & Statistics Canada, Labour Force Survey, 2001

Cameron Strategy, Growth Monitor May 2003

in Alberta<sup>58</sup>. The University is now operating well beyond capacity<sup>59</sup>. This U of C example is indicative of the post-secondary strain especially in Calgary, as the city is handling the bulk of the growth in the province.

#### It's about jobs and economy

What is driving demand? A key reason for the recent surge in demand is an understanding that post-secondary education is essential to being competitive in the job market.<sup>60</sup> The Association of Universities and Colleges of Canada projects 30 per cent growth in full-time students by 2011. And even at this rate, less than one in four Canadians would be able to attend a post-secondary institution<sup>61</sup>.

Across Canada undergraduate enrolment in colleges and universities has risen five times faster than population growth in the last four years alone<sup>62</sup>. This is because the fastest growing occupations require a higher level of education<sup>63</sup>. Between 1990 and 2001 approximately 1.6 million jobs were also added for those who had completed college, trade, and vocational programs, and over 1.1 million jobs were created for university degree holders. Meanwhile, 1.1 million jobs were lost for those without a high school education<sup>64</sup>.

Over the next 10 years, Alberta Learning forecasts that 79% of new jobs will require post-secondary education<sup>65</sup>. There is a strong need for highly qualified people to foster innovation and close the widening "productivity" gap in Canada<sup>66</sup>. Moreover, the benefits of post-secondary education are enormous. Where prevalent, there is increased economic growth and development, and healthcare, social costs and crime rates fall. Income levels also substantially rise<sup>67</sup>. Degree-holders earn 100 per cent more than those without high school education<sup>68</sup>.

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STRATEGY

## CAMERON STRATEGY

**Overall demand for full-time education is increasing<sup>69</sup>.**

Post-secondary institutions in Canada are bracing for another baby boom echo. There is forecasted to be a surge in demand for post-secondary

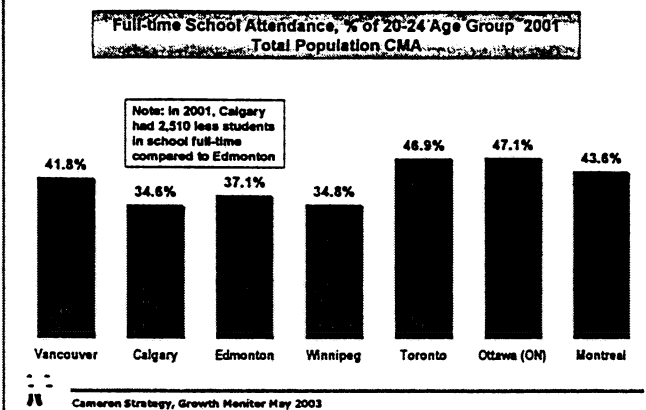
education as the children of the first wave of the post-war baby boomers grow up and leave high school. By 2011, there will be eight (8) percent more students aged 18 to 21 than there are today<sup>70</sup>.

**It's not only about young learners**

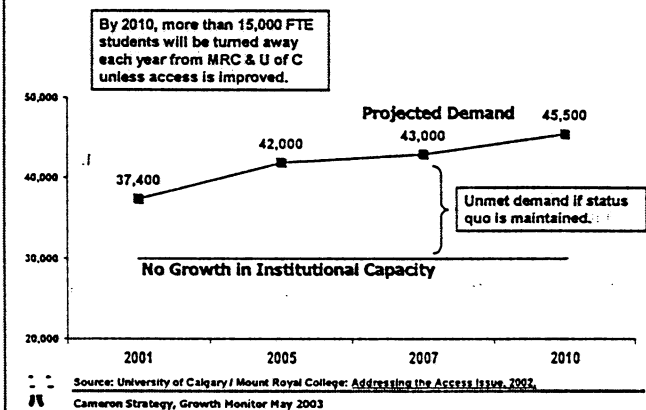
Alberta Learning forecasts that between 2001 and 2016, Alberta's working age population will increase by approximately twenty (20) percent<sup>71</sup>. This growth will increase the demand for skill upgrading and continuous learning in today's ever-changing knowledge and technological society. Therefore, post-secondary institutions will likely be feeling the strain from a sizeable young-learner population, but also from the mature learner who is seeking skill upgrading and continuous learning.

Part-time enrolment has also increased in Alberta. In the same period (1995 to 1999), part-time enrolment at Alberta's universities increased by 22%, and by 6.5% at its colleges and technical institutes. This is in sharp contrast to Canada's decline in part-time university enrolment by 13%, and only a slight

### Full-time School Attendance, Age 20-24



### Projected Demand for Degree Programs in Calgary



increase of 0.7% in Canada's colleges and technical institutes<sup>72</sup>.

### Calgary's Unmet Demand

Among major metropolitan areas across the country, Calgary has one of the lowest proportion of full-time students in the 20 to 24 age group<sup>73</sup>. With a population as large and educated and that has grown as fast as Calgary has, this would indicate that there likely is an access issue to post-secondary education. This has direct implication for the University of Calgary where 80% of its students are undergraduates.

The enrolment limits will present an even greater hurdle for today's high school students. It is estimated that about 12,000 qualified students will be turned away from programs at the University of Calgary and Mount Royal College over the next decade<sup>74</sup>. While at SAIT, the institute is projecting turning away close to 43,000 qualified students by 2010, (overall applications for 2003 are up 29.6%

### COMMENT

"There is very serious risk fulfilling the potential for Alberta's economic future caused by a current and growing shortage of highly skilled people to fuel the economy and fill the jobs industry so desperately needs to keep their businesses growing. Simply put, we cannot achieve the full potential of Alberta's economy if we do not have the people to do the work, fill the jobs, create new ideas and innovations, build the businesses, and drive the economy. Alberta's shortage of skilled labour are a serious problem today and all indications are that these shortages will become even more acute in the future."

"An Urgent Call to Action"  
AEDA's Jobs for the Future Committee

### COMMENT

"Today, we have a large gap in our system. The economy has a growing demand for skilled workers – a demand that SAIT is currently unable to meet. We must invest in technical training now, so we can educate and train the workers Alberta's economy needs to be competitive."

Steve Snyder  
President/CEO, TransAlta

over 2002 alone). All of Calgary's post-secondary institutions are working collaboratively to tackle this issue of meeting the demand for post-secondary enrolment<sup>75</sup>, however, with Calgary's population growth showing no signs of immediate restraint, increased capacity at Calgary's post-secondary institutions is a critical issue for sustained economic development.

This situation is unlikely to improve in the near future because all post-secondary institutions have been at capacity for some time and turning

That translates into a difference of 71 less spaces in Calgary for every 10,000 persons. In terms of all post-secondary in Calgary (including colleges and technical institutes) Calgary has almost 7,000 fewer available spaces than Edmonton<sup>78</sup>. Based on demographic projections

and current capacity, by 2010 this would double to more than 22,000 full-time equivalent (FTE) students per year will be turned away from the U of C, SAIT, and MRC alone if this access problem is not addressed<sup>79</sup>.

#### COMMENT

Only 43% of (Alberta) high school students move on to post-secondary education. Statistics Canada: "Youth in Transition", Jan '02) – the lowest rate in Canada. And while high school dropout rates have been following a downward track, they remain above the national average. These figures highlight Alberta's reliance on immigration for its pool of highly skilled workers.

The major culprit for the low enrolment rate is the cost of post-secondary education. Over the past decade, Alberta universities and colleges have doubled tuition fees, but this increase has only partially offset cuts in grants, leaving overall per-student funding down in real terms. Then, it is hardly surprising that student debts have skyrocketed, with the Alberta Ministry of Learning reporting an average student debt on graduation of \$18,000 in Alberta."

D Economics, "The Calgary-Edmonton Corridor – Take Action Now to Ensure Tiger's Roar Doesn't Fade", April 22, 2003.

grant per-  
than SAIT  
of Calgary.  
A's

#### THE BOTTOM LINE

To nurture Alberta's key urban engine of growth and sustain prosperity for the province as a whole, government needs to invest more in Calgary's post-secondary institutions and, at least, bring funding levels on par with Edmonton's institutions.

applicants away in high-demand faculties and departments<sup>76</sup>. This problem is compounded because Calgary is growing much more quickly than Edmonton. The U of C has 425 available places for every 10,000 persons in the Calgary CMA; while the U of A has 496 places for every 10,000 persons in the Edmonton CMA<sup>77</sup>.

### Calgary's problem is Alberta's problem

The shortage of spaces is particularly acute in Calgary, but it is a provincial challenge. Alberta ranks eighth in Canada in the number of degrees, diplomas and certificates awarded per 10,000 population aged 18-24. On average, Canada awards 636 degrees, diplomas and certificates per 10,000; in Alberta, Canada's fastest growing province, that number is just 444<sup>80</sup>.

### Calgarians' perspective on education: A high priority

Education is a prominent issue in Alberta and the City of Calgary<sup>81</sup>. Most recently, approximately 1 in 9 Calgarians cited education as the *most* important issue facing the City of Calgary<sup>82</sup>. Alberta-wide, 14% cited education as the *most* important issue facing Alberta. This number doubles to over 1 in 4 (27%) of total mentions citing education as an important issue in Alberta<sup>83</sup>.

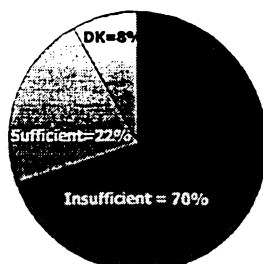
### Demand for post-secondary education has grown, while Calgary's population is increasing rapidly

There is also currently a gap in per-student funding between post-secondary institutions in Edmonton and Calgary. Both NAIT and the University of Alberta receive higher

student funding and the University. In 2001, the U of operating grant was \$8,109 per-student; at the U of C it was \$7,149 per-student<sup>84</sup>. This is roughly a \$1,000 annual per-student difference

#### Education Issues in Calgary

"Given the demands of growth in Calgary, do you feel that the amount of money currently being spent to address education issues is sufficient or insufficient?"



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in funding. In 2002, NAIT's operating grant was \$7,532 per-student; at SAIT it was \$7,401 per-student – resulting in an annual equity difference of approximately \$1.4 million for SAIT alone.



## SECTION 5: QUALITY OF LIFE

## Quality of Life: Amidst Greatness, Rising Concerns

## Overwhelmingly, Residents Consider Calgary's Quality of Life Good

Recent studies<sup>85,86</sup> indicate that Calgarians feel that they have a great quality of life – over 9 in 10 continue to rate their quality of life in the city as very good or good. In a national survey<sup>87</sup> of Canada's seven key urban centres, Calgary's residents' rating ranked the city as having the highest quality of life. The same study also indicated that about four in five residents (79%) feel that Calgary, after Ottawa, was a great place to raise a family.

Calgarians are generally very positive, and along with Ottawa<sup>88</sup>, over three-quarters indicated that they are optimistic about the economic future of the city.

And with the recent award as the world's Top Intelligent Community (along with Seoul, South Korea), the city seems ideally positioned for the future<sup>89</sup>.

With the city's relative affluence and growth, it is not surprising that Calgarians are generally happy. And it shows with among the highest level of satisfaction ratings on most key city services and infrastructure when compared to other cities<sup>90</sup>.

While growth has been positive for Calgary, there have been rising concerns of how it is beginning to exact negative impacts on the lives of residents.

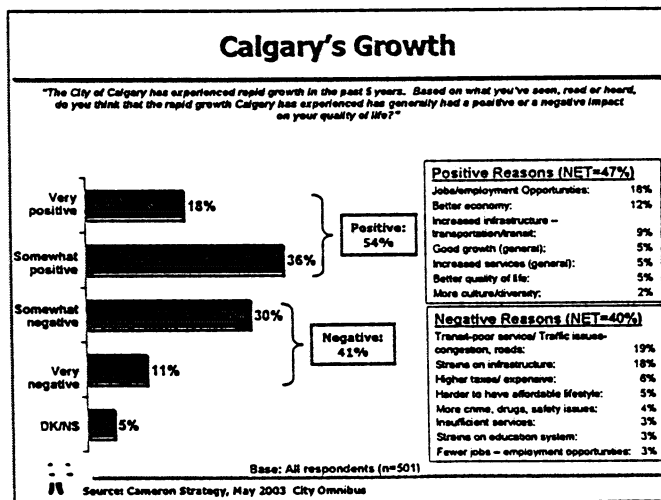
## COMMENT

## Calgary's Quality of Life: An International Perspective

In a 2002 study of 215 international cities, Calgary ranked 31<sup>st</sup>. This study by Mercer looked at 39 factors, including politics, economics and the environment to rate overall quality of life in each city studied. By these measures, cities in Europe, Australia and New Zealand dominated the top 10 percent. 2002 results for other Canadian cities included Vancouver at 2<sup>nd</sup> place tied with Vienna, Toronto at 18<sup>th</sup> place, and Montreal and Ottawa tied in 25<sup>th</sup> place.

## Calgarians' Perspective on Growth: 2 in 5 feel that it has had a negative impact on their quality of life.

Recent research<sup>91</sup> indicates that over half of residents (54%) feel that the rapid growth that Calgary has experienced over the past five years has had a positive impact on their quality of life. Younger Calgarians (69% of those aged 18 to 34 years) and those with a college/technical education (63%) were more likely to feel that



## CAMERON STRATEGY

growth impacted their lives positively. More jobs, employment opportunities and a better economy were the top factors identified for this upbeat response.

However, two in five residents (41%) think that this rapid growth in the city has had a negative impact on their life (30% saying "somewhat negative" and 11% "very negative"). Those saying that this growth has not favourably affected them tend to be older residents (those 55 years or older) – a group traditionally challenged by change.

Mobility issues (poor transit service and traffic congestion) and strains on infrastructure were the top reasons cited among those negatively impacted by this growth. To a lesser extent, other issues – expenses, affordability, crime and safety – indicate that Calgary is taking on concerns similar to other larger urban centres.

## COMMENT

As [province's] cities grow in population, efforts should be made to reduce urban growth." Two-thirds of Western Canadians agree with the statement. Alberta respondents have slightly higher agreement – perhaps reflecting strong urbanization trends experienced by the province in recent years.

Looking West 2002 – A survey of Western Canadians."  
Canada West Foundation,  
April 2003

## Is Calgary growing too fast for its own good?

In tracking attitudes towards city rate of growth<sup>92</sup> across Canada's key urban centres, Calgary was the only city where the majority of its residents (65%) felt that their city was growing too fast for its own good. In fact, more than three times as many respondents felt this way compared to those (19%) who did not. This 46 percentage point differential is unique to Calgary.

In reviewing key growth indicators<sup>93</sup>, Calgary outpaces these other urban centres in terms of population (CMA, 15.8% growth over 1996 to 2001) and new dwellings (CMA, 30.8% growth over 1991 to 2001). The combination of more people and housing are putting more stress on limited resources – land, financial and infrastructure<sup>94</sup>.

undertaking of community activities and social interaction.

Longer-term residents feel that the friendliness and spirit of the city has been in decline and affecting Calgary's quality of life. As noted in the Calgary Herald's "Soul of the City" survey<sup>96</sup>, "neighbourhood activities" ranks eight out of eleven ways residents network with each other. The study found that over three-quarters (77%) of Calgarians rarely or never got involved in neighbourhood activities, with only five percent (5%) who did get involved.

Calgary often prides itself on the extent of civic and community engagement among its citizens. Signs are emerging that continued growth may increase the challenges of sustaining the spirit of civic involvement, which is arguably one of the most fundamental facets of Calgary's identity.

## COMMENT

If people live in a neighbourhood more than 20 years, almost a third get involved in its activities. If under three years, less than a fifth."

Soul of the City  
Calgary Herald, June 13, 2003

Urban sprawl has been a growing concern for Calgary. Beyond frustration of the constraints presented by roads and traffic, the city has expanded its neighbourhoods to its boundaries and is pursuing a strategy of annexation. As identified in a study on Western Canadian Urban Sprawl<sup>95</sup>, there are a number of social impacts with this phenomena. With increased

suburban development in the suburbs, where many of the city's newest residents reside, comes increased commuting times, leading to less

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- <sup>3</sup> Statistics Canada, 2001 Census.
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- <sup>9</sup> "State of the West 2003, Western Canadian Demographic and Economic Trends." Canada West Foundation, May 2003. Derived from Statistics Canada Data.
- <sup>10</sup> Socio-Economic Outlook 2002-2007: Calgary & Region. The City of Calgary, 2002.
- <sup>11</sup> Statistics Canada, 2001 Census; Visible Minority Population: Edmonton – 14.6%; Rest of Alberta – 2.7%.
- <sup>12</sup> Statistics Canada, 2001 Census.
- <sup>13</sup> Statistics Canada, 2001 Census. Includes responses indicating single responses of a non-official language and multiple responses. Multiple responses include cases where one of the languages is either English or French, in combination with one non-official language. Other languages: Edmonton – 19.7%, Rest of Alberta – 11.7%.
- <sup>14</sup> Statistics Canada, 2001 Census. In fact, Alberta has the second highest incidence of individuals claiming "no religious affiliation" affiliation among the provinces.
- <sup>15</sup> "Competing on Creativity: Placing Ontario's Cities in North American Context." Report prepared for the Ontario Ministry of Enterprise, Opportunity and Innovation and the Institute for Competitiveness and Prosperity, November 2002.
- <sup>16</sup> *ibid.* Based on the Study's Tech-Pole Index – the index compares a region's share of national employment in high-technology industries to the region's overall share of national employment, adjusted for city size by multiplying by a region's share of national high-technology employment.
- <sup>17</sup> Statistics Canada. Average earnings of all earners and proportion of low earners, high earners and full-year, full-time earners, Canada and CMAs, 2002.
- <sup>18</sup> Statistics Canada, 2001 Census. Average Value of Dwelling: Alberta - \$159,698; Calgary - \$201,751; Edmonton - \$146,529; Rest of Alberta - \$133,392.
- <sup>19</sup> Cameron Strategy, Calgary Omni Tracking, 2001-2003.
- <sup>20</sup> *ibid.* About 50% more likely to have a university education compared to longer term residents (resident six or more years).
- <sup>21</sup> "Urban Rule: Charting the New Role of Canadian Cities." Cameron Strategy & Probe Research, 2003. Seven major Canadian urban centres studied – Vancouver, Calgary, Edmonton, Winnipeg, Toronto, Ottawa and Montreal – 98% of Calgarians rated the quality of life in their city as good.
- <sup>22</sup> "Urban Rule: Charting the New Role of Canadian Cities." Cameron Strategy and Probe Research, 2003. 77% of Calgarians indicated that they are optimistic about the future of the city.
- <sup>23</sup> "Urban Rule: Charting the New Role of Canadian Cities." Cameron Strategy & Probe Research, 2003.

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- <sup>24</sup> Statistics Canada, 2001 Census.
- <sup>25</sup> Cameron Strategy, Growth Monitor Tracking, May 2003.
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- <sup>27</sup> Cameron Strategy, Growth Monitor Tracking, May 2003.
- <sup>28</sup> Cameron Strategy, Growth Monitor Tracking, May 2003.
- <sup>29</sup> Cameron Strategy, Alberta Omnibus, Jan 2002-May 2003.
- <sup>30</sup> City of Airdrie 2002 Citizen Satisfaction Survey. Cameron Strategy, Feb 2003.
- <sup>31</sup> The City of Calgary, 2002 Annual Report.
- <sup>32</sup> The City of Calgary (political). Source: City of Calgary Annual Civic Census.
- <sup>33</sup> City of Calgary, Annual Reports, 2000 & 2002.
- <sup>34</sup> City of Calgary Annual Citizen Satisfaction Survey, 1997-2003. Accord Research and Cameron Strategy.
- <sup>35</sup> In Spring 2002, Calgary City Council approved \$263 million infrastructure projects for 2002. An additional \$672 million will be spent over the next four years for new interchanges, expanded transit capacity and upgraded roadways. Source: The City of Calgary 2002, Annual Report.
- <sup>36</sup> As indicated in the 2003 State of the City Address, road improvements in 2002 will save average rush commuter and estimated 45 minutes a week in travel time. This translates almost 40 hours a year.
- <sup>37</sup> "Tightening our Beltways: Urban Sprawl in Western Canada." A Western Cities Project Discussion Paper. Canada West Foundation, Oct 2002.
- <sup>38</sup> As identified in "Looking Ahead, Moving Forward: Council's Priorities 2002-2004," City of Calgary, May 2002.
- <sup>39</sup> Statistics Canada, 2001 Census. Density based on population of CMA.
- <sup>40</sup> Statistics Canada, 2001 Census.
- <sup>41</sup> Cameron Strategy, City Omnibus, May 2003.
- <sup>42</sup> Cameron Strategy, City Omnibus, May 2003.
- <sup>43</sup> Maclean's Magazine retained Professor David Andrews, University of Toronto to analyze results and key indicators for each region from 2000-2001 Canadian Institute of Health Indicators and Statistics Canada data.
- <sup>44</sup> Statistics Canada, 2001 Census
- <sup>45</sup> As discussed in "The Calgary-Edmonton Corridor: Take action now to ensure Tiger's Road doesn't fade." TD Economics, April 22, 2003.
- <sup>46</sup> Alberta Health & Wellness, Population Estimates, April 2001 Boundaries of estimates as March 21 each year.
- <sup>47</sup> Statistics Canada, 2001 Census. Calculated by dividing population under 15 years and over 65 years by the number of persons aged 15 to 64 years.
- <sup>48</sup> Alberta's dependency ratio is 45.2%; Edmonton CMA is 43.6%; while rest of Alberta (excluding Calgary CMA & Edmonton CMA) is 51.5%.
- <sup>49</sup> Calgary Health Region, 2003.
- <sup>50</sup> Age standardized rate per 100,000, 2000-2001, 2003 Health Indicators, Canadian Institute of Health Information and Statistics Canada.
- <sup>51</sup> Health expenditures, 2000 Actual, 2001 & 2002 forecast 2003 Health Indicators, Canadian Institute for Health Information and Statistics Canada.

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While it is acknowledged that there are numerous complexities in the final allocation of Alberta Health & Wellness funds across regions, the dollars identified are direct transfers to Regional Health Authorities and exclude fees and charges, revenue from ancillary operations, donations, investment income, amortization of external capital contributions, as well as funding to Cancer and Mental Health Boards. Issues related to out of region patients are not considered. Per capita funds are calculated by dividing in year direct Alberta Health & Wellness funding by the population at the beginning of the year.

*ibid.*

In 2002/2003, approximately \$120 million of Capital Health Region's budget was allocated for patients living outside of the region, while for Calgary Health Region this sum was \$44 million. It is noted that funding equity issues is an area for more in-depth inquiry.

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- <sup>76</sup> Alberta Learning: Alberta's Post-Secondary Education System: Issues and Considerations 2001.
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- <sup>79</sup> Mount Royal and University of Calgary: Addressing the Access Issue, 2002.
- <sup>80</sup> Statistics Canada: Education in Canada 1998, Catalogue 81-229.
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- <sup>87</sup> Urban Rule studied the following cities – Vancouver, Calgary, Edmonton, Winnipeg, Toronto, Ottawa and Montreal.
- <sup>88</sup> "Urban Rule: Charting the New Role of Canadian Cities." Cameron Strategy and Probe Research, 2003.
- <sup>89</sup> The City of Calgary's 2003 Citizen Satisfaction Survey indicated that 81% had access to Internet – this is among the highest rates for cities around the world. CS 2003 Awarded by World Teleport Association.
- <sup>90</sup> "Urban Rule: Charting the New Role of Canadian Cities." Cameron Strategy and Probe Research, 2003.
- <sup>91</sup> Cameron Strategy, City Omnibus, May 2003
- <sup>92</sup> Urban Rule: Charting the New Role of Canadian Cities, Cameron Strategy and Probe Research, 2003.
- <sup>93</sup> Statistics Canada, 2001 Census.
- <sup>94</sup> The issue of Infrastructure is discussed in the Mobility Monitor in this series of papers.
- <sup>95</sup> "Tightening Our Beltways: Urban Sprawl in Western Canada – Western Cities Project Discussion Paper." Canada West Foundation, October 2002.
- <sup>96</sup> "Soul of the City": commissioned by JMCK Polling for the Calgary Herald. "How neighbours became Strangers" was published on June 13, 2002.