



Why Calgary?

Exploring the Reputation – Reality Gap

Discussion Paper 2

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Institute for Community Prosperity

CityXLab
From Place to Experience

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Executive Summary

In the first Why Calgary [discussion paper](#), we explored the big question of whether Calgary is vulnerable to losing our best and brightest young talent. In this second paper, we dig deeper into the question of city identity, brand and reputation and their influence on young mobile talent attraction and retention.

Great cities are stories that every citizen sees themselves in. This story plays an important role in connecting people together over a shared sense of purpose and belonging.

Think about a city like a person. We are all composed of a unique combination of DNA and lived experiences. This is what makes us, uniquely us. This is our identity and why there are no two people alike. Our brand is how we choose to articulate our identity to others. It is how we dress, speak and tell our story to the world. Our reputation is how the world perceives us. Because reputation is owned by others, perception is reality. In other words, a reputation doesn't have to be true, it just has to be believed.

The gap between reputation and reality is both a threat and opportunity to Calgary. The threat is that Calgary's reputation continues to lag behind its reality. We know that young people migrate to places they believe provide greater professional prospects and are more aligned with their core values, and we know that Calgary's reputation paints a different picture than that of the reality young mobile talent find when they arrive. The opportunity is for Calgary to mobilize its courage and capacity to fill the reputation vacuum, by defining and projecting an authentic brand that celebrates the diverse voices and defines a progressive and confident city, built on the past, but looking singularly forward.

Closing our reputation - reality gap starts with defining a cohesive and authentic brand for Calgary, one that clearly conveys our unique value and our city's unique competitive

advantage. Establishing and communicating a unified message helps shape a shared purpose for a city, its organizations and citizens. To better understand the challenge and opportunity, this discussion paper focuses on five key areas:

1. What is a city brand?
2. What is Calgary's reality?
3. What is Calgary's reputation?
4. Is there a gap between Calgary's reputation and the reality of the Calgary experience?
5. What can be done to close the reputation – reality gap facing our city?

To bridge the reputation-reality gap, we propose a series of recommendations designed to inspire debate and creative solutions.

Action 1: Appoint a Chief Brand Officer (CBO) to be singularly accountable for a coordinated and committed roll-out of the new Calgary brand model across all sectors and communities.

Action 2: Expand engagement to refine the 2019 brand model. This must engage diverse partners across the commercial, social and public sectors, including postsecondary institutions, and from across all four quadrants of the city.

Action 3: Find meaningful ways to anchor Calgary's brand in distinct, believable and authentic lived experiences, rather than aspirational values.

Action 4: Coordinate brand building activities across the commercial, social, and public sectors across the city to encourage commitment and creativity. Authentic city brands transform citizens into advocates.



A City As A Story

"All people, but especially the young, tend to become what society says they are."

Robert Hughes¹

For the past half-decade, Calgary has faced serious economic and social headwinds, with fundamental structural changes in the oil and gas sector contributing to the highest unemployment rate of Canada's six largest cities over the past five years.² These macro-level socio-economic forces are fundamentally transforming our city. Our city's relative competitive position is no longer the proximity to natural resources, rather it is our ability to attract, retain and mobilize human capital - talent.³

In the new world of talent, we must think differently and ask, "why Calgary?" The *Why Calgary* project is a community initiative facilitated by the *Institute for Community Prosperity's* [CityXLab](#) at Mount Royal University that explores this question for young mobile talent (YMT) aged 18-29. In our first discussion paper, we highlighted an emerging risk of the gap between Calgary's reputation and reality. This is because perception is reality, and we act on perception.

Have you ever wondered why television commercials for cars rarely tell you anything

about the car itself? Instead, the focus is entirely on how you will feel in the car. Do you want to feel tough? Then purchase this truck. Do you want to be a person who is popular? Purchase this slick sports car and watch the friends roll in. Whether in fact this automobile actually makes you tough or popular, is secondary to you believing it will.

A city's brand is about connecting people together with a shared sense of purpose and belonging.⁴ A brand is a story, and *people love to be part of a good story*.⁵ A city with a shared purpose and story attracts and retains the talent essential to our community's future prosperity.⁶ In this discussion paper, we explore what we refer to as a reputation vacuum, by considering the important conversations and work to date, led by groups such as [Calgary Economic Development](#), [Tourism Calgary](#), and [Calgary on Purpose](#). In doing so, we focus on five questions:

1. What is a city brand?
2. What is Calgary's reality?
3. What is Calgary's reputation?
4. Is there a gap between Calgary's reputation and the reality of the Calgary experience?
5. What can be done to close the reputation - reality gap facing our city?

The City Brand System

When considering a city's brand, it is important to view it as a dynamic system incorporating three dimensions: identity, brand, and reputation (Figure-1). These three dimensions are constantly evolving in a series of feedback loops.

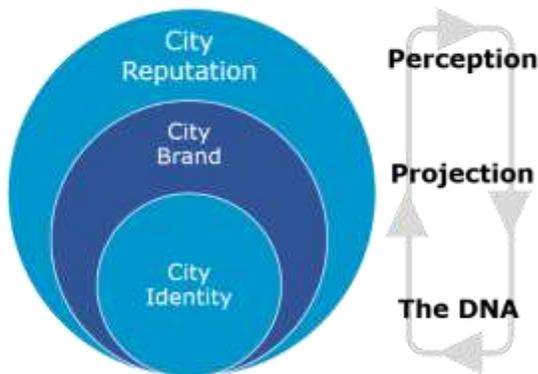


Figure-1: The City Brand System

City Identity: A city's identity is what makes it unique. It is a city's DNA. A city's identity is authentic and real.

City Brand: A city's brand projects its sustained story to the world. It is designed with intent and purpose. All brands are anchored in consistency. This consistency generates the essential frequency of messages and the recall required to cut through in a crowded media world.

City Reputation: A city's reputation is how it is perceived by an audience. Reputation is in the *eye of the beholder*. Because a city's reputation is owned by people, perception is reality. Perception is the outcome of both direct and indirect engagement with a city. This may come from someone's direct and personal experiences, or it may be the outcome of different forms of media (social or mass).





For most people, a city is not just a place to live, but an extension and projection of our own identity. If you identify as a tech entrepreneur, you may project yourself as being in Silicon Valley. If you identify with progressive social values, you may project yourself as living in Vancouver. The intersection with our identity and place is a critical dimension when considering the influence of reputation on YMT. This projection is called social identity and is a mechanism to rationalize our place in the world.⁷ Social identity is our self-perception framed by being a member in a group or groups. Group membership can include virtually anything. It may be as a parent, a fan of a sports team, a member of a political party, or citizen of a city, province or country. Social identity begins to frame attitudes (e.g., shared values) and behaviors (e.g., advocacy, loyalty) as we seek to align identity with our group or groups.⁸

Our mission is to inspire and encourage Tasmanians, and those who want to be Tasmanian, to quietly pursue the extraordinary.

BRAND TASMANIA

The role of social identity is amplified today with the rise of social media and the echo-chambers it perpetuates. In other words, our social identity defines the groups we are members of, which in turn reinforces the values and attitudes of this group and insulates us from opposing views. Social groups embed a social tipping point. As a member of a group,

Tasmania

In 2019, Brand Tasmania was founded with the mission of inspiring and encouraging Tasmanians, and those who want to be Tasmanian, to “quietly pursue the extraordinary”. Brand Tasmania’s mandate is to develop, maintain, protect and promote a Tasmanian brand as a shared public asset. This process involved conducting 440 unique interviews with Tasmanians about what they loved about their state. Through these in-depth conversations, consistent themes emerged, and with those emerged a true representation of the thoughts and opinions of the state. Not only knowing, but owning their story, allowed every Tasmanian to appreciate all that Tasmania had to offer, instilling a pride in its residents, encouraging the sharing and promotion of the state’s successes, and most importantly, formed an authentic brand that truly differentiates Tasmania from anywhere else in the world. The strategy is simple, they want every Tasmanian to be a brand ambassador.

Calgary’s takeaway: *In Calgary we need to flip our thinking. Great brands today are about sharing ownership. Calgary needs to provide the tools for Calgary’s 200 community associations, and thousands of community organizations to become the face of our brand.*

you observe the sentiment of the group. Because you’ve decided this group aligns with your worldview, you trust the legitimacy of this group and its members.⁹ Thus, once a critical mass of members of this group adopts a dominant position, the remaining members of this group tip, and adopts this position. Each member of this group then diffuses this sentiment into their other networks, which in turn may adopt this position and tip.¹⁰ This is the essence of “going viral”. You only need to look at today’s highly polarized political discourse to see these phenomena at work.¹¹

So, how may these phenomena influence a city's reputation? As noted, a city's reputation is solely perception. If an emerging sentiment of a group (e.g., young creatives) is that Calgary is not an inclusive and welcoming city that supports arts, culture and creativity, this sentiment may achieve critical mass and tip. As a result, the singular worldview of this group becomes self-reinforcing as members seek to secure their social identity by amplifying messaging that supports the dominant worldview. In today's world framed by social identity, echo-chambers and tipping points, perception is reality.

Calgary's Brand Evolution

***"Calgary doesn't have a narrative that appeals to a greater audience. Our unique value proposition isn't clear. Our current narrative doesn't serve us."*¹²**

Calgary's city brand and visual identity strategy has evolved over the past decade in many ways which reflect the changing face of our communities and our civic priorities (Figure-2). We've grown from "The Stampede City" in the 1970s to "Host City" in celebration of the 1988 Olympic Games to "Heart of the New West" in the 1990s. In 2012, Calgary engaged in a one-year consultation process to change the existing visual identity ("Heart of the New West") to reflect a more contemporary

view of our city. The selected direction ("Be Part of the Energy") became Calgary's official brand and was expanded in 2017 by Tourism Calgary to include five key recommendations aimed at positioning Calgary as the ultimate host city. "Be Part of the Energy" continues to be central to Calgary's external visual identity and is integrated into the brand architecture of Calgary Economic Development, the City of Calgary, and Tourism Calgary.

In today's world framed by social identity, echo-chambers and tipping points, perception is reality.

In 2017, Tourism Calgary and Calgary Economic Development jointly established a multi-staged process to analyze Calgary's brand evolution and better understand its brand personality.¹³ Though this program did not uniquely focus on youth and young adults, it provides an important foundation to understand Calgary's reputation and a potential framework for the future. This program concluded that the disconnect between Calgary's DNA and its reputation is rooted in a lack of coherent and unified brand position.



Figure-2: The evolution of Calgary's visual identity



Issue 1: We just don't get it.

There is not only a general lack of understanding of Calgary's brand position, but also of the role of place branding as part of a broader civic strategy. All brands are rooted in a commitment, and there is no unified and broad commitment across Calgary's commercial, social, and public sector to a city

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brand.

Issue 2: We believe in magic bullets.

There is a perception that the challenges facing Calgary's reputation can be fixed with a magic bullet solution. Successful city brands are not the results of short-term initiatives. Rather, they are the result of a widespread and sustained community commitment.

Issue 3: We talk, but we don't listen.

At the time of the brand evolution study, Calgary's limited branding activity remained dependent on old school unidirectional broadcasting of brand messages, not the conversations essential to authenticity.

Issue 4: We are entrepreneurial but not innovative.

Though Calgarians share big city aspirational values, the research showed that we are more entrepreneurial (thinking small) than innovative (thinking big). Moving a city brand demands big thinking.

The 2019 Brand Model

Following the brand evolution research, the city's brand committee composed of community leaders from the commercial, social and public sectors, moved to the next stage and transformed this research into Calgary's 2019 brand model (Figure-3).

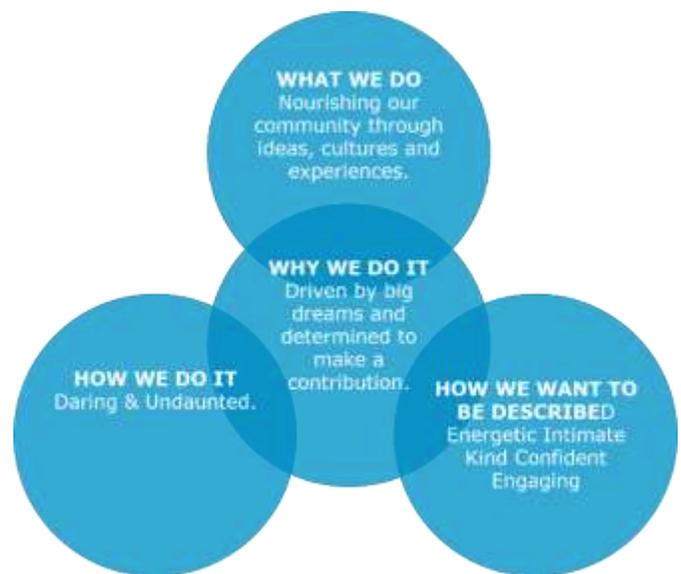


Figure-3: Calgary's 2019 brand model



This 2019 brand model is based on five attributes:

Energetic: We're an energetic city and we always have been. Our spirit is lively, our culture is eclectic, our minds are active, and our schedules are filled with activities of all kinds. Our language should be as lively and interesting as the people you meet here every single day.

Successful city brands are not the results of short-term initiatives. Rather, they are the result of a widespread and sustained community commitment.

Intimate: We're comfortable with who we are. And while we're not typically the type of people to shout from the rooftops, it's easy to figure out where we're coming from. We're open, honest, and inclusive. We speak from the heart. And we're remarkably welcoming to friends, colleagues, and visitors alike, in everything we do.

Kind: We come from an exceptionally kind place where people say hello to strangers, naturally share stories and help each other out. When we communicate, we do it in a friendly way, like we're talking to a person who stopped us on the street to ask for directions. We might even say, "Just follow me."

Confident: We know how to get things done. We're a city of experts, innovators, explorers, and adventurers, in every sense. We don't sit back and watch the world from the sidelines. We jump in, we create, we invent, and we make things happen. Without being brash, our language is confident, bold, and self-assured.

Engaging: We appreciate how much more enjoyable things are when people get together to do things they love, or things they're trying out for the first time. We foster a spirit of connection and invite people with diverse opinions and ideas to engage with each other as much as possible, whether that's talking, eating, sporting, working, traveling, or celebrating.

2019 Calgary Brand Model

In Calgary we nourish our communities through ideas, cultures, and experiences because we are driven by big dreams and determined to make a contribution. We are daring and undaunted when it comes to our goals. Seen as confident, energetic, engaging and kind, Calgary is big enough to be lively and connected enough to feel intimate. We get it done. Together.



Reputation vs. Reality Analysis

Our analysis follows three steps (Refer to Figure-4). The first step conducts a DNA audit of Calgary. This provides a baseline for what is real and authentic. The second step analyzes the city's reputation. We will do this among Calgarians, those outside of Calgary and finally, among YMT. The third and final step conducts a gap analysis between the city's DNA and its reputation.



Figure-4: Reputation – Reality Gap Analysis

AUCKLAND

Once a city lacking a cohesive and intentional story, Auckland, New Zealand has since won City Nation Place's 'Place Brand of the Year 2020' award, thanks to dedicated efforts by Auckland Unlimited, an economic and cultural agency committed to ensuring Auckland remains a desirable place to live, work, invest, and do business. So, how did Auckland propel its city brand into the spotlight? Through stakeholder engagement, effective storytelling, and a true understanding of the complexities of city branding – "often this type of work can get caught up in the city logo and straplines, and sometimes it can get derailed by politics. There are so many stakeholders. But ultimately, the city brand belongs to its residents." Auckland Unlimited took a comprehensive approach to establishing their city brand through robust research, engaging their citizens (creating buy-in along the way), and ensuring stakeholders were as informed as possible, including executive buy-in at a Mayoral level. Using Destination Think's trademarked process for uncovering Place DNA, it was revealed that Auckland has a strong rationale appeal, with a relatively low emotional appeal. This finding was pivotal for the city as emotional appeal is what builds a reputation and draws individuals to a place. The process involved co-creative workshops with residents, quantitative research across representative samples of residents, a quantitative survey with travelers and visitors to better understand how the world viewed Auckland, and lastly, a two-year data scrap of publicly available websites, blogs, social media etc., with almost 92 million conversations from over 500,000 sources, including a detailed look at Auckland's own communication.

Calgary's takeaway: The importance of stakeholder engagement, the power of technology in uncovering their Place DNA™, and how effective storytelling helped them share what Tāmaki Makaurau Auckland has to offer for students, visitors, skilled workforce, and investors alike.

What Is Calgary's Reality?

Auditing Calgary's DNA

How can we better understand the reality of life in Calgary, and how can we map what Calgarian's think of our city? Our first step is to provide a brief overview of Calgary's attributes. These attributes provide us a sense of what is real and authentic. The brand evolution program framed Calgary's DNA attributes in three areas: society; environment; infrastructure (Refer to Figure-5).¹⁴ This audit of Calgary's attributes is not intended to be exhaustive, rather its goal is to provide a baseline to examine the gaps between the city's core attributes and its reputation.¹⁵



Figure-5: The three-dimensions of a city's DNA

Societal Attributes

A city of history

Calgary is located in the traditional territories of the Niitsitapi (Blackfoot) and the people of the Treaty 7 region in southern Alberta which





includes the Siksika, Piikani, Kainai, Tsuu T'ina and the Stoney Nakoda First Nations. The city is also home to the Metis Nation of Alberta, Region III. Indigenous peoples have settled this area for an estimated 11,000 years.¹⁶ Today, just under three per cent of Calgarians identify as Indigenous.¹⁷ The Blackfoot name for the location of the city is Mohkínstsis. The location of the current city was first settled by non-Indigenous people in the 1870's and further grew with the railway, receiving its city charter in 1894.¹⁸

A city in transformation

Over the past twenty-five years, Calgary's population has almost doubled in size.¹⁹ In the

past decade, Calgary's population has grown by 24.4 per cent, making it the second fastest urban centre in Canada after Saskatoon.²⁰ This rapid growth has transformed the socio-economic composition of the city.

A culturally diverse city

This rapid growth contributed to making Calgary the third most ethnically diverse city in the country with 33.7 per cent of Calgarians identifying as part of a racialized community (Refer to Figure-6).²¹ However, 31 per cent of Calgarians report feeling out of place or uncomfortable due to one, or a combination of, the following: religion, ethnicity, skin colour, culture, language, accent, gender, and sexual

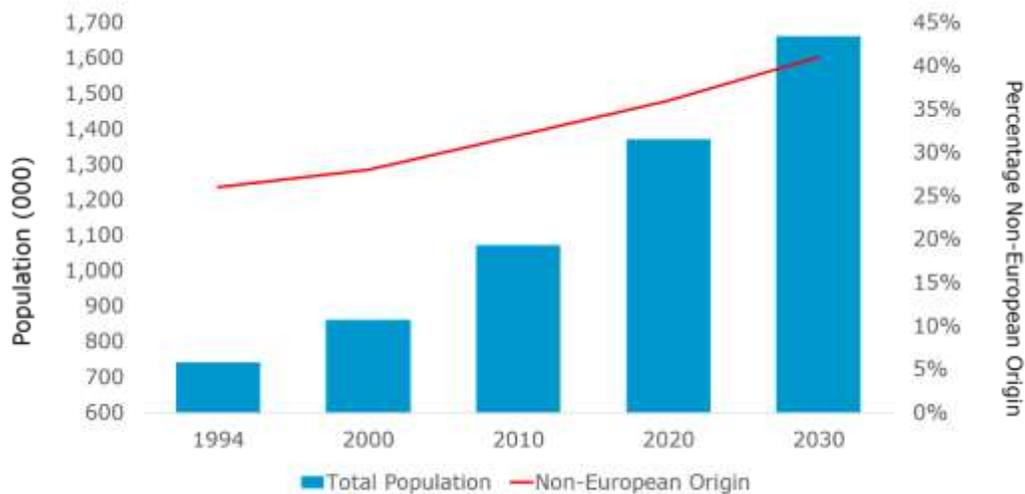


Figure-6: The changing face of Calgary

orientation.²² Moreover, 67 per cent of Black Calgarians report feeling unsafe or threatened.²³ Therefore, though Calgary is a culturally diverse city, it is arguably not yet an inclusive city.

An educated city

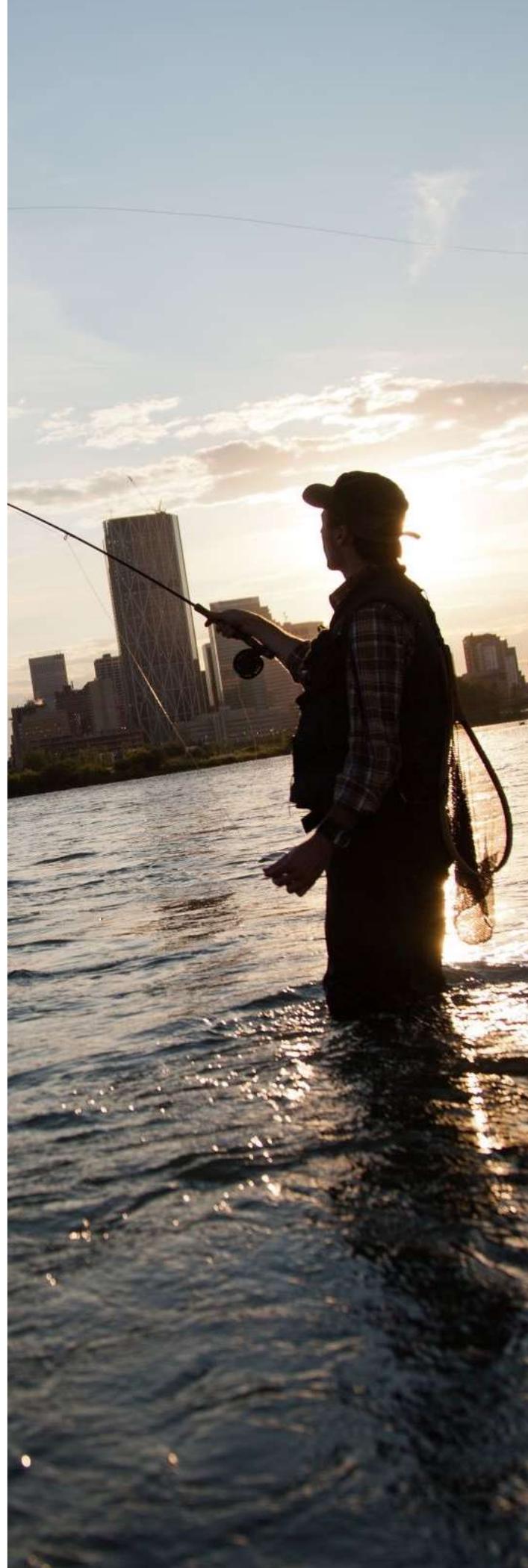
Calgary possesses one of the highest education attainment levels in Canada. At 27 per cent, Calgary possesses the highest proportion of science, technology, engineering and mathematics (STEM) graduates of major Canadian cities, with a high concentration in geo-sciences and related areas.²⁴

An affluent but economically divided city

At \$59,623, Calgary has the highest personal income of any major city in Canada.²⁵ Moreover, Calgary has the highest per-capita millionaires in Canada.²⁶ As a result, the ratio of Alberta's top 20 per cent of earners to the bottom 20 per cent was 26 to 1. Prior to the pandemic, Calgary's unemployment rate was 7.2 per cent, well above the national average,²⁷ and a forecasted stagnant economy will contribute to a high unemployment rate for the next half decade.²⁸ Finally, a third of Calgarians struggle to afford basic necessities²⁹, and over the past five years, Calgary has seen a 25 per cent increase in demand for food bank supports.³⁰ The increasing gap between the wealthy and economically marginalized Calgarians is a significant political and social issue facing our city.

A health(ier) city

Today, 68 per cent of Calgarians meet the Canadian physical activity guidelines, compared to 60 per cent in Edmonton and 63 per cent in the rest of the province.³¹ In addition, Calgary leads the nation in expenditures in sport and active recreation experiences.³² Lastly, Calgary is among the





leaders in perceived physical and mental wellbeing.³³

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A creative city

The creative economy in Calgary is made up of a vibrant ecosystem of broadcasting, electronic, digital media and film, visual arts and crafts, museums, literature and print media, fashion, and performing arts organizations – all of which come together to shape the cultural, creative, and experiential life of our city. In 2018, Calgary’s creative industries directly contributed more than \$2.1 billion to Calgary’s GDP, contributing a total economic footprint of \$3.85 billion (with considerations of supply chain impact and wages)³⁴. Our citywide creative industries are large and growing. Calgary’s creative industries employ more than 24,000 individuals as part of 4,400 businesses every year.³⁵ The creative economy in Calgary, and in Alberta as a whole, has demonstrated significant growth potential to 2030 and

¹ 86% of creative jobs have little to no risk of being replaced (British Council, 2016).

beyond, and is recognized as being both uniquely resistant to automation and a key creator of employment opportunities in the Calgary context. Perhaps more importantly, the creative economy in Calgary plays a critical role in talent retention and in attracting young, skilled, and knowledgeable industry professionals to jobs at a low risk of automation¹, a key challenge facing our city in the future.³⁶

A giving city

Calgary is the most philanthropic city in the country, based on both the percentage who donate and their median donation.³⁷ In addition, Calgarians remain active in their community, with 49 per cent of reporting volunteering a minimum of once per month.³⁸ However, Calgarian’s sense of belonging tracks lower than both the Canadian and Alberta averages.³⁹

Environmental Attributes

Location

Calgary is at the confluence of the Bow and Elbow Rivers and 62 km from the eastern slopes of the Canadian Rockies.



Climate

Calgary has the most days of sun year-round of Canada's largest cities. With over 333 days of sun, it has on average 2,396 hours of sunshine annually.⁴⁰ The average daily temperatures in Calgary ranges from 16.5 °C (61.7 °F) in July to -6.8 °C in December. Long winters are broken up by warm, dry Chinook winds. Though Calgary gets relatively little precipitation, Sunshine Village in Banff National Park averages 10 meters of snow per year.⁴¹ Climate change has also resulted in significant changes and potential impacts from severe weather events, which are forecasted to increase in future years.⁴²

Air and water

Calgary possesses some of the highest quality air and water in North America.⁴³

Parks

99.5 per cent of Calgary residents are within a five-minute walk of one of the 5200 parks or greenspaces.⁴⁴ Calgary has over 150 dog parks and community gardens, making it one of the highest per capita in North America.⁴⁵

Infrastructure Attributes

Physical footprint

Calgary's physical footprint is 825.56 sq. km. Its rapid outward expansion over the past two-decades has led to it also possessing the highest per capita carbon and ecological footprints in Canada.⁴⁶

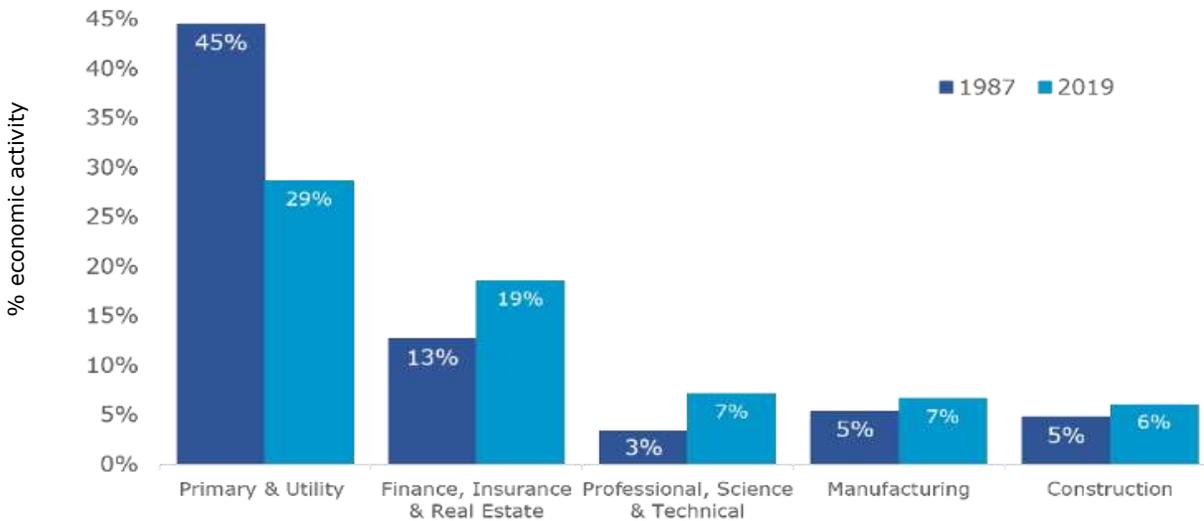


Figure-6: Economic activity by sector



Economy

With 117 head offices, Calgary has more head offices per capita than any other Canadian city.⁴⁷ In addition, as per Figure-6 on the previous page, the primary sector in Calgary is *industries and utilities* (inclusive of oil & gas and agriculture) and contributes \$36 billion (28.4 per cent) at decline from 44 per cent in the 1980s. Moreover, because of our history in energy, Calgary is ranked as one of the top 15 clean technology (cleantech) ecosystems in the world.⁴⁸ In addition, we are home to more than 70 per cent of Alberta’s cleantech head offices.⁴⁹ Finally, Calgary has the second highest number per capita of small businesses and self-employed individuals in Canada.

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Connectivity

Calgary is a highly connected city, with 16,600 km of roads. 80 per cent of trips in Calgary are by personal vehicle, and Calgary transit provides 106.5 million trips annually.⁵⁰ In addition, the city has 1000 km of pathways and 54 per cent of Calgarians live within 400 m of an all ages/abilities bike route.⁵¹ However, Calgary maintains the second lowest aggregated walk-bike score of major cities in Canada. With almost 18 million annual travelers, Calgary’s airport is fourth busiest in Canada.⁵²

Experiences

Prior to COVID-19, Calgary’s experience ecosystem included over 10,500 enterprises, employing 134,000 people. This ecosystem includes world-class events, such as the Calgary Stampede, World Cup competitions, and world-class venues including: the Central Library, Spruce Meadows, Calgary Zoo, WinSport Canada Olympic Park, Studio Bell, home of the National Music Centre, Sports Hall of Fame, TELUS Spark Science Centre, and the National Music Centre. In addition, Calgary’s proximity to the mountains provides it access to some of the world’s best winter sport activities. See Figure-7 for a breakdown.

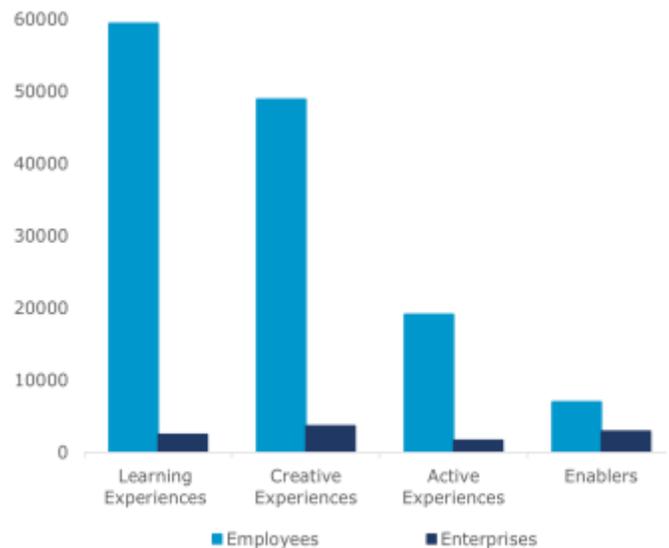


Figure-7: Calgary’s experience economy

What Is Calgary's Reputation?

Step 2 in this process is to analyze Calgary's reputation. To do so, we consider its reputation from three perspectives: the Calgarian perspective; an outsider's perspective; and the perspective of YMT.

Calgary's Reputation: The Calgarian Perspective

The city's brand evolution program included a representative survey of Calgarians; civic stakeholder workshops; and interviews.⁵³ As per Figure-8, the model adopted by the brand evolution research suggests Calgarians broadly define Calgary through its environmental attributes. In contrast, the average Canadian city is anchored in societal attributes.

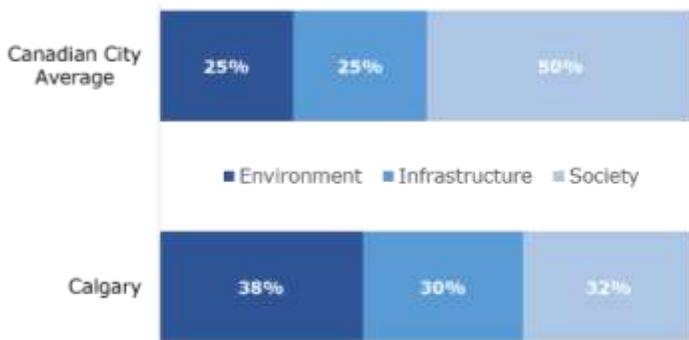


Figure-8: Perceived attributes by cluster (Calgarians)

Figure-9 on the following page further breaks down the results of this survey by identifying the top ten leading attributes that Calgarians use to define Calgary. This study found that Calgarians define the mountains, rivers, and the oil & gas sector as the three leading attributes of the city. Of equal importance to what is included on this list, is what is not included on this list. For example, cultural diversity is ranked as 13th, and Indigenous people, culture and history is ranked 20th.

Three of five of the lowest ranked attributes incorporate arts and culture, museums & attractions, visual artists, musicians, and public art.

When asked to rate the performance of different attributes, Calgarians are generally positive, but fewer than 60 per cent gave a passing grade to community building; attractions & museums; performing arts; and economic development (refer to Figure-10). Further, when broken out by age, we see a significant divide among age groups. For example, those who are 18-34 and 55+ are generally positive in most areas. In contrast, those aged 35 to 54 rank the performance of every attribute the lowest.

Summary: The Calgarians' Perspective

Overall, Calgarians perception of Calgary is only marginally linked to core dimensions of the city's DNA. As we emphasized, a reputation does not have to be true, it only needs to be believed. Calgarians perceive their city to be anchored in nature (true), the oil & gas sector (true) and for being welcoming (partially true). However, respondents do not perceive our city's Indigenous heritage, cultural diversity, and creative economy as being central to the city's DNA. Metaphorically, it is like playing in a symphony orchestra and being more interested in the venue than your fellow musicians. Even stranger, in the past 25 years, the symphony orchestra has doubled in size and expanded into hip hop and hard rock, but when asked what the best thing about our orchestra, your answer is the location of the venue. Yet, what is most concerning is that a quarter of the next generation of star musicians plan to leave because they believe the symphony, even with its massive transformation, remains committed to repeating past performances, instead of developing new ones that the crowd wants to hear.

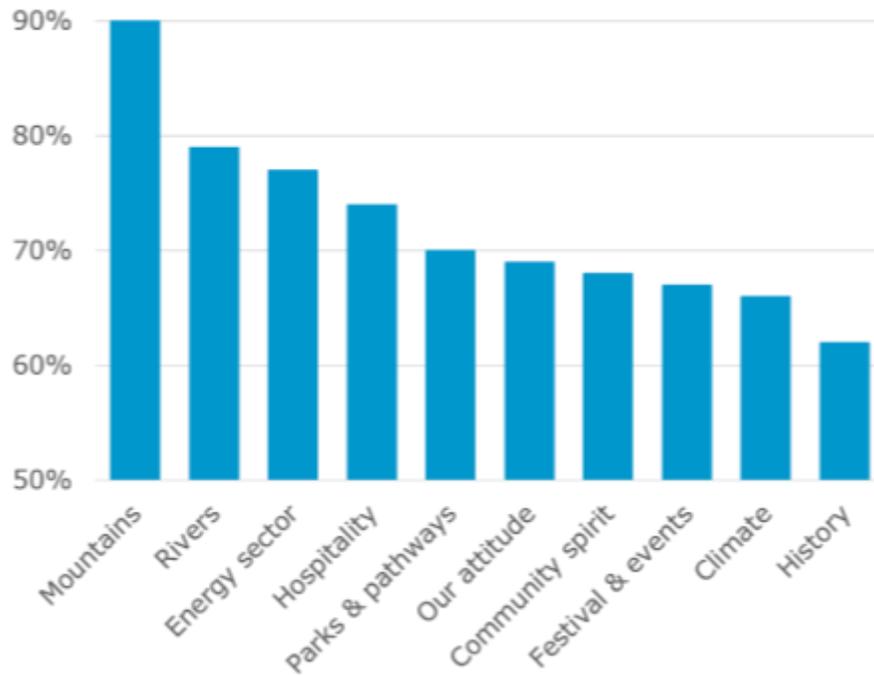


Figure-9: Top ten attributes (Calgarians)

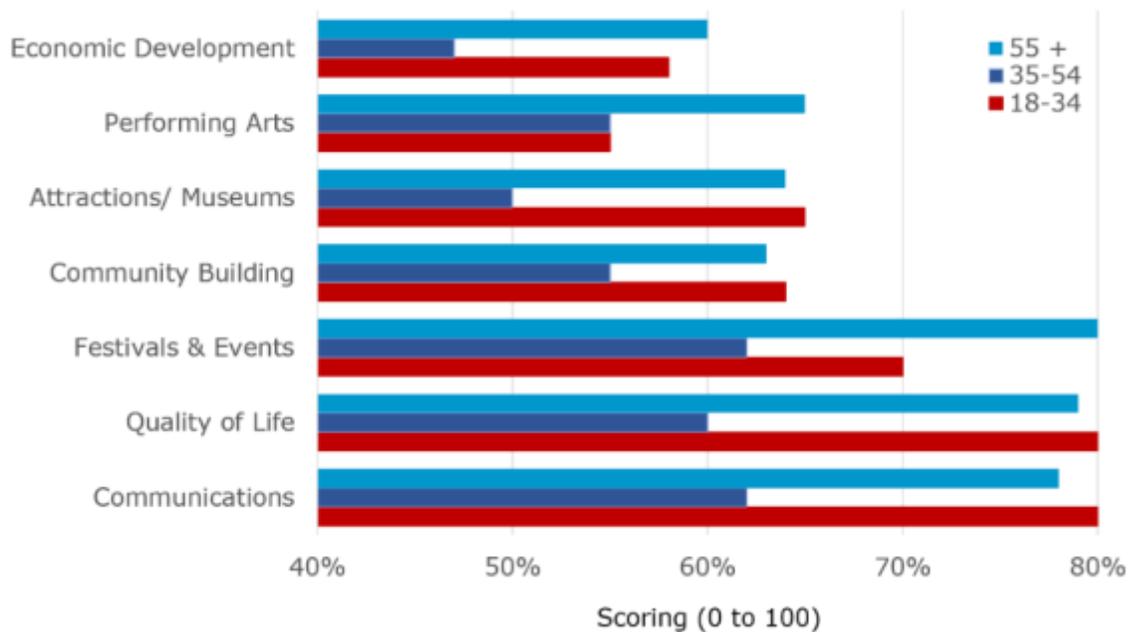


Figure-10: Performance rating by age (Calgarians)

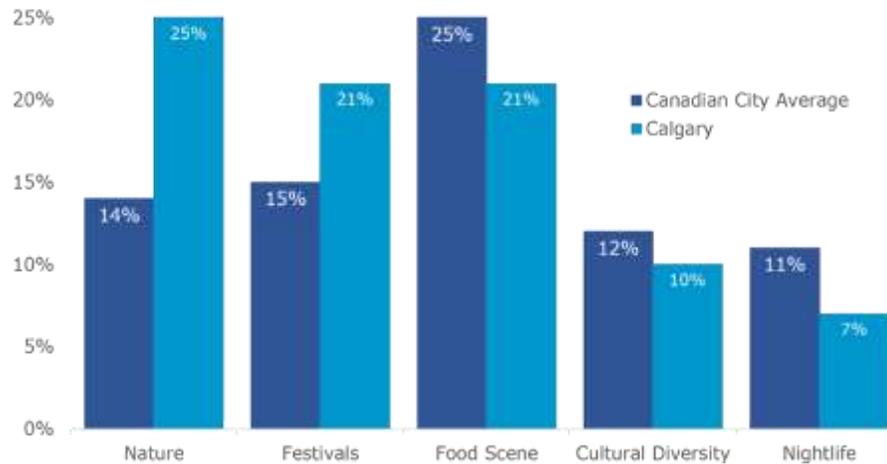


Figure-11: Share of conversation by attribute (external)

Calgary’s Reputation: An Outsider’s Perspective

To get a snapshot of the perception of Calgary from the outside, the city’s brand evolution program analyzed almost 10 million online conversations from 500,000 digital sources over a two-year period.⁵⁴ This analysis evaluates the sentiments of the volume of conversations and their tone as being positive, negative or neutral. The results of this sentiment analysis found an overall strong positive sentiment towards Calgary. As per Figure-11, Calgary scored above the Canadian city average. Like Calgarians, natural attributes, such as rivers and mountains are dominant. Festivals and events are also significantly above the Canadian city average, but we hypothesize this is rooted in the Calgary Stampede. Calgary is below the Canadian city average in the food scene, cultural diversity, and nightlife.

Figure-12 provides a summary of the sentiment analysis by attribute. Areas related to the creative economy, including the local food scene, hospitality, the music scene, public art, and craft breweries held high levels of

positive sentiment from outsiders. Whereas the oil & gas sector, economic development, cultural diversity, and Indigenous culture, held the highest level of negative sentiment. The researchers identified that community spirit saw a 20 per cent increase over the two-years of data. This suggests that Calgary’s community spirit plays a large role in how outsiders see the city.

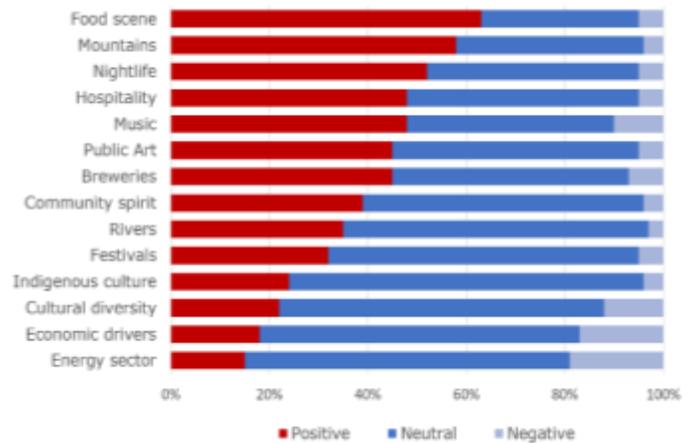


Figure-12: Sentiment by attribute (external)

Summary: An Outsider's Perspective

Overall, outsiders have a positive view of Calgary. Interestingly, they assign higher value to experience economy assets, including food, music, and arts than do Calgarians. The higher negative association with cultural diversity and Indigenous culture, may reflect a lack of visibility.

Calgary's Reputation: The Young Mobile Talent Perspective

The city's brand evolution work did not explicitly isolate young adults, however, a more recent study in 2020 by the City of Calgary explored attitudes of those 18-24 relative to those 25+. Overlaying the results of the brand evolution study, with the City of Calgary research, starts to provide a sense of the reputation and reality challenges, as well as opportunities facing Calgary.

The 2020 study found that 93 per cent of 18-24-year-old Calgarians believe Calgary offers a good quality of life; 75 per cent believe Calgary is a great place to make a living.

As reported in Figure-12, the 2020 study found that 93 per cent of 18-24-year-old Calgarians believe Calgary offers a good quality of life; 75 per cent believe Calgary is a great place to make a living; and 80 per cent believe Calgary is headed in the right direction. Consistent with the brand evolution research, the younger cohort is far more positive than the older cohort.⁵⁵ This study also explores the drivers for young people to leave or stay. Employment and education are two of the key drivers that younger respondents identified for leaving,





with friends and family being the dominant driver for staying.

The economy

As considered in discussion paper 1, and further supported by the city's brand evolution research, the dominance of the oil & gas sector continues to be one of the pillars of the city's identity. But research suggests almost two-thirds of those who are Gen Z have no interest in working in this sector. This is further reinforced by findings that 60 per cent of those 18-24 in Calgary believe that pursuing new employment opportunities will be their primary driver for leaving the city (compared to 38 per cent for those 25 and older).⁵⁶ Given this highly negative perception among youth and young adults, it is not a leap to hypothesize the observed external online negative sentiment towards Calgary's energy sector may be rooted in the attitudes and values of this younger cohort external to the city.

The dominance of the oil & gas sector continues to be one of the pillars of the city's identity...But research suggests almost two-thirds of those who are Gen Z have no interest in working in this sector.

An extension of Calgary's link to the oil & gas sector is its impact on Calgary's reputation as a city committed to the environment and climate change. For example, the 2020 study

Glasgow

Glasgow had a reputation problem. As a city it was a symbol of crime and an economy dependent on the past, not the future. In 2013, the city launched the world's first crowdsourced city branding initiative called, "People Make Glasgow." On a bootstrapped budget of £90,000, it engaged 1,500 people from 42 countries, including 400,000 Facebook and Twitter conversations over a four-week period. The result was an inclusive brand. The city launched the brand just in time for the 2014 Commonwealth Games. Its continued expansion is anchored in creating a flexible model to allow it to be adapted for targeted use e.g. "People Make Glasgow Creative". The Glasgow City Marketing Bureau partnered with the city's universities and airport as brand partners. Moreover, they engaged with the city's small businesses, through a digital toolkit.

Calgary's takeaway: Great brands are anchored in passionate advocates, not giant advertising budgets. The future of Calgary's brand must be driven by 1.4M advocates.

found that 86 per cent of those 18-24 were concerned about climate change, compared to 69 per cent of those 25 and older. Though a large majority of young adults rate Calgary's current quality of the environment (e.g., water, air) as good (84 per cent), it is lower than the older cohort (92 per cent). This research shows that young adults want increased investments in areas such as public and active transportation (e.g. cycling, walkable) networks.⁵⁷ However, combined with the perception that the primary industry in the city and province is not concerned about their generation's best interests, amplifies a

perception that the city will pursue short-term economic gain over long-term environmental action.⁵⁸ Young adults expect leaders to take bold action when it comes to the environment, and a lack of action poses a significant threat to attracting or retaining young talent.

Inclusivity

Calgary may have embraced diversity in numbers, but young adults remain skeptical whether Calgarians more broadly have embraced the importance of inclusivity. For example, young adults are twice as likely to agree (47 per cent) ‘strongly’ that ‘Calgary needs to address racism and discrimination’ than are Calgarians aged 25 and older (23 per cent). Moreover, 93 per cent of those 18-25 believe it is important to understand the Indigenous perspective, compared to 73 per cent 25+.⁵⁹ The brand evolution research which suggests that Calgarian’s do not perceive cultural diversity or Indigenous culture as core attributes of the city, further supports the position that Calgary may be diverse, but not inclusive.⁶⁰ As identified in discussion paper 1, one of the critical gaps today is lack of comparable data to other jurisdictions. Therefore, the relative position of Calgary (and Calgary YMT) on issues related to diversity and inclusivity is difficult to ascertain.

Vibrancy

Various studies reinforce the evidence that young Calgarians seek a city that has a vibrancy that connects creative, active, and learning experiences.⁶¹ The City of Calgary study reports that 24 per cent of those aged 18-24 define Calgary as dull. When asked what Calgary could do to become more vibrant, 17 per cent of respondents aged 18-24 identified arts & culture (compared to five per cent for those over 25). Moreover, nine per cent identified education and recreation as two of the most important issues facing Calgary, dramatically higher than the older cohort (three per cent and four per cent).⁶² 72 per cent of those 18-24 view the expansion of Arts

Commons as a priority, compared to 57 per cent of those over 25. The brand evolution research also showed a similar generational gap in the satisfaction of dimensions associated with creative experiences, such as music and arts.



Figure-13. Young Mobile Talent Attitudes

Gap Analysis

Reputation – Reality Gap Analysis

In Table-1 and Figure-14, we define eleven attributes which emerged from the first two stages of the reputation-reality analysis. In addition, we incorporate the five attributes that anchor Calgary’s 2019 brand model. These attributes extend across society, environment, and infrastructure. We then evaluate each attribute based on six criteria:

1. Is the attribute authentic?
2. What is the evidence the attribute is true?
3. Do Calgarian’s perceive it to be true?
4. Do those outside of Calgary perceive it to be true?
5. Do YMT perceive it to be true?
6. What are the implications on the acquisition, retention, and development of YMT?

Table-1: Reputation – Reality Gap Analysis of Sample Attributes

Select Attributes	Authenticity	Evidence	Calgarian Reputation	External Reputation	YMT Reputation	Implications to YMT
1. Calgary is defined by our access to nature.	Full	Rivers, Mountains.	Full	Full	Full	Reinforce as our foundational reputational attribute.
2. Calgary's prosperity intertwined with the oil & gas sector.	Full	28 per cent of GDP.	Full	Full	Full	The city's link to oil & gas is an economic asset, but a reputational liability.
3. Calgary is a city of opportunities.	Full	2 nd most small business.	Partial	No	No	This attribute is diluted by the dominance of oil & gas.
4. Calgarians are talented.	Full	Highest level of education in country.	No	No	No	An undervalued reputational attribute.
5. Calgary is culturally diverse.	Full	34 per cent from racialized communities.	No	No	No	An unrecognized reputational attribute.
6. Calgarians value our history.	Partial	Values its western heritage, Not its Indigenous roots.	Partial	Partial	Partial	Has emerged as a stereotype that is a liability to a progressive reputation.
7. Calgarians are welcoming.	Partial	Calgary is friendly but not inclusive.	Full	Full	Partial	Inclusivity and welcoming are foundational to YMT.
8. Calgary is a city of vibrant experiences.	Full	Active, creative & learning experiences.	Partial	Full	No	An undervalued reputational attribute.
9. Calgarians possess a unique community spirit.	Full	Volunteerism and philanthropy.	Full	Full	Partial	An undervalued reputational attribute.
10. Calgarians are forward looking.	Partial	Roots in oil & gas, but growth in areas such as cleantech.	No	No	No	This is an emerging attribute that is foundational to YMT.
11. Calgarians are committed to sustainability.	No	Ecological and carbon footprint.	No	No	No	This is foundational to YMT, but the city cannot authentically claim this attribute.
12. Calgarians are energetic.	Full	Active economy, Volunteerism, and philanthropy.	Full	Full	Partial	Play on the term energy is a reputational liability to YMT.
13. Calgarians are intimate.	Partial	Calgary is friendly but Not inclusive.	Full	Full	Partial	Inclusivity and welcoming are foundational to YMT.
14. Calgarians are kind.	Partial	Volunteerism and philanthropy.	Full	Full	Partial	We are kind, but YMT do not believe this is a universal truth.
15. Calgarians are engaging.	Full	Active, creative & learning experiences.	Partial	Full	No	An undervalued reputational attribute.
16. Calgarians are confident.	No	No	No	No	No	There is little evidence in 2021 to support this attribute.
Total (Max 32)	23		18	19	10	

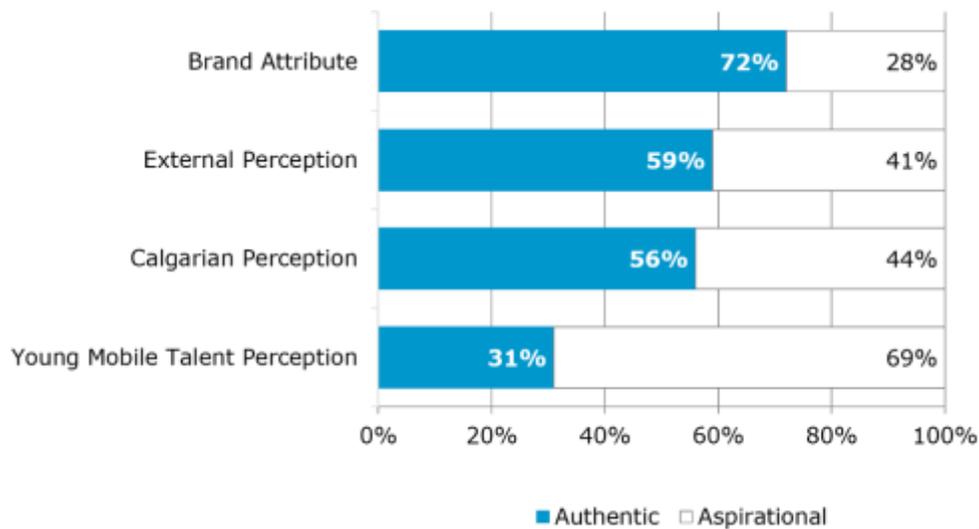


Figure-14. Reputation – Reality Gap Analysis

Figure-14 above is designed to visualize the reputation – reality themes from Table-1.⁶³ Firstly, 72 per cent of the brand attributes analyzed were scored as authentic and 28 per cent aspirational. We then see a significant perceptual gap for external audiences (13 per cent) and Calgarians (16 per cent). This suggests that Calgary’s reputation is underperforming its reality. However, the real issue is amplified when we consider the 41 per cent gap between reality and the perception of YMT. This represents the emerging threat, but very real opportunity facing our city. When you review Table-1, you will note there are numerous attributes, linked to areas such as economic opportunities, diversity, and civic

attitudes where we interpret a significant gap between reality and the perception. Closing this reputation-reality gap is critical to the attracting, retaining, and developing YMT.

Bringing Our Brand To Life

In this section, we propose a framework to stimulate action for closing the reputation – reality gap facing our city and specifically its implications on the acquisition, retention, and development of YMT. It is critical to recognize these actions are framed as a starting point for a much larger conversation about the role of brand and reputation in sustaining and growing Calgary as a magnet for YMT. As a

community, we can no longer afford to defer this challenge. The time is now for our community to adopt bold and proven solutions. Defining a city brand is not about finding consensus, rather it is about every citizen seeing themselves and their family reflected in it. This reflection is the foundation of authenticity and ownership. Building on the strengths of the two-year brand evolution program, the recommendations below are designed to inspire a broader debate and call for community action.

Action 1: Appoint a Chief Brand Officer

Recommendation

Many large complex organizations with diverse businesses and reach have adopted a chief brand officer (CBO) model. Examples include Lululemon, McDonalds, Uber, Bell Canada, Mattel, Canadian Tire, Amazon. This role is an organization's brand manager and chief storyteller, accountable for enabling a coordinated and committed roll-out across all sectors and communities. In complex organizations, this role sits independent of Chief Marketing Officer (CMO) which has direct accountability for all dimensions of marketing, including product, service, promotion, customer service, pricing and distribution. With a brand as complex as a city, the CBOs role is to support commercial, social, and public sector marketers in adapting and telling their unique story, within the framework of the larger Calgary story. For this reason, a critical role of a CBO is establishing an effective brand governance framework for all stakeholders.

How to Measure Progress

1. Calgary appoints a CBO in 2021.
2. All public city-level branding resources are coordinated by the CBO to maximize efficiency and reach.

NEWFOUNDLAND AND LABRADOR

Newfoundland and Labrador have established a reputation of friendliness and knack for storytelling, ranking among the Top 10 Friendliest Cultures in the World, according to Maclean's Magazine. Oftentimes, a place brand is synonymous with a city or region's story. In Newfoundland and Labrador's case, their brand *is* storytelling. "Storytelling is part of our DNA", exclaims Christopher Mitchelmore, Newfoundland and Labrador's Minister of Tourism, Culture, Industry, and Innovation. Newfoundland and Labrador have told a consistent story, while leaving room for the story to evolve over time alongside the province and its people. "A Tangled Tale" was an eight-week campaign showcasing the province's proud storytelling tradition, focused not only engaging with the place, but with the people, as it allowed locals to share stories from their own perspectives. This campaign not only communicated Newfoundland and Labrador's brand authentically, through and by its people, but aims to encourage travelers to visit and create their own authentic experiences and tales to tell. Newfoundland and Labrador are able to tell a consistent and cohesive brand story because it is being told by its people, not on behalf of them, therefore closing the gap between aspirational and authentic.

Calgary's takeaway: To ensure an authentic place brand, allow locals to speak for themselves and share their own stories (related to Orchestra analogy, Newfoundland & Labrador appreciate the people that make up the province, not just the place - i.e., musicians vs. venue).

Action 2: All Calgarians Must Own Our Brand.

Recommendation

Expand engagement to refine and authenticate the 2019 brand model. Following the model of other initiatives, including Tasmania and Glasgow, the goal of mass and broad engagement is to expand ownership of the brand to a community leader and citizen level. This must engage diverse partners and citizens across the commercial, social, and public sectors, including postsecondary institutions, and from across all four quadrants of the city.

How to Measure Progress

1. Percentage of organizations engaged in activities to refine the 2019 brand model. Organizations engaged are representative of Calgary in areas associated with sector, size, and quadrant of city.
2. Percentage of Calgarians engaged in activities to refine the 2019 brand model. Individuals engaged are representative of Calgary's population in areas associated with ethnicity; age; and income.
3. Percentage of brand projections initiated by citizens.
4. New brand model is finalized by September 1, 2021.

Action 3: Close the Aspiration – Authenticity Gap

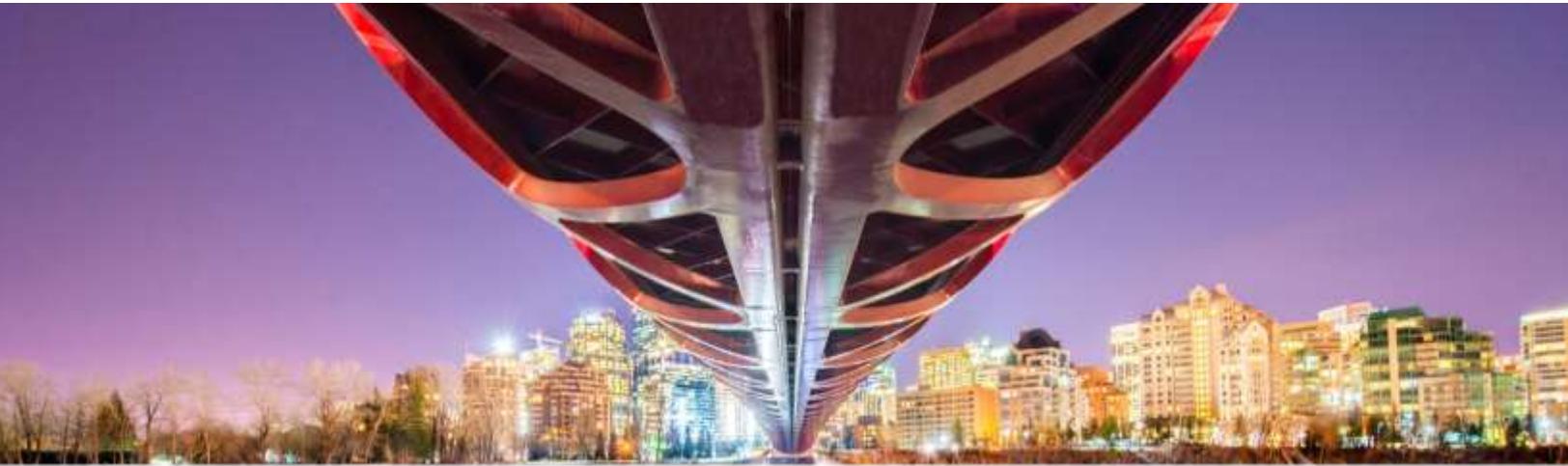
Recommendation

If Calgary's brand is to be sustainable and meaningful, it must be anchored in authentic lived experiences. Unfortunately, many of the proposed 2019 brand mode attributes are aspirational, rather than authentic. During the refinement process of Action 2, brand attributes must be aligned to authentic, distinctly Calgarian experiences. Secondary aspirational brand attributes (e.g., inclusivity, sustainability) may be projected, but must remain rooted in an authentic experience of Calgary, and not in the aspirational and generic ideal of a "big city".

How to Measure Progress

1. Measure how often brand attributes are mobilized in online conversations by Calgarians.
2. Ensure that all aspirational brand attributes possess measurable key performance indicators to determine their authenticity.
3. Measure which aspirational attributes are linked to authentic experiences.





Action 4: Bring It To Life

Recommendation

City brand building demands coordination and commitment across the commercial, social, and public sectors from across the city. The new CBO must build a coalition of brand champions to operationalize Calgary's 2021 brand. This must include enabling all commercial, social and public partners to tell the Calgary story and their own story - in their own words.

How to Measure Progress

1. Budget secured to support initial three-year program.
2. Percentage of organizations who commit to become brand advocates.
3. Calgary net promoter score (broken by sector and key socio-demographic variables).
4. Visitor net promoter score (broken by key socio-demographic variables).
5. Measure "new" organizations who become brand advocates.

CONCLUSION

The future of Calgary will be defined by its ability to attract, retain, and develop talent. Research shows that the reputation of a city plays an important role in connecting people together over a shared sense of purpose and belonging. Our reputation is how the world perceives us. Because reputation is owned by others, a reputation doesn't have to be true, it just has to be believed.

This study concludes that the gap between Calgary's reputation and reality is both a threat and opportunity to Calgary. The threat is Calgary's reputation continues to lag behind its reality in many areas essential to critical stakeholders, including YMT. The impact being young people migrating to places they believe provide greater professional prospects and are more aligned to their core values. The opportunity is that Calgary has the courage and capacity to seize the moment to fill the reputation vacuum by defining and projecting an authentic brand that celebrates the diverse voices and defines a progressive and confident city, built on the past, but looking singularly forward.

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- Calgary Economic Development
- ATB Financial
- Calgary Airport Authority
- Calgary Arts Development
- Calgary Chamber
- Calgary Municipal Land Corporation
- Calgary Sport and Entertainment Group
- Calgary Stampede
- Calgary Technologies Inc.
- Calgary TELUS Convention Centre
- City of Calgary
- DIRT
- GE
- Meetings + Conventions Calgary
- City of Calgary
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- United Way of Calgary
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⁵⁴To review the comprehensive Tourism Calgary Brand Evolution project, Retrieved from <https://www.visitcalgary.com/industry-partners/programs-resources/brand-evolution>

⁵⁵Respondents who agree and strongly agree with the statement. Refer to City of Calgary Attitudes and Outlook Survey. Retrieved from <https://www.calgary.ca/content/dam/www/cfod/csc/documents/fall2020-cssr/2020-Calgary-Attitudes-and-Outlook-Survey-FINAL-Report.pdf>

⁵⁶City of Calgary (2020, October). Attitudes and Outlook Survey. Retrieved from <https://www.calgary.ca/content/dam/www/cfod/csc/documents/fall2020-cssr/2020-Calgary-Attitudes-and-Outlook-Survey-FINAL-Report.pdf>

⁵⁷City of Calgary Attitudes and Outlook Survey. Retrieved from <https://www.calgary.ca/content/dam/www/cfod/csc/documents/fall2020-cssr/2020-Calgary-Attitudes-and-Outlook-Survey-FINAL-Report.pdf>

⁵⁸City of Calgary (2020, October). Attitudes and Outlook Survey. Retrieved from <https://www.calgary.ca/content/dam/www/cfod/csc/documents/fall2020-cssr/2020-Calgary-Attitudes-and-Outlook-Survey-FINAL-Report.pdf>

⁵⁹Calgary Foundation's Vital Signs Report (2020). Retrieved from <https://calgaryvitalsigns.ca/>

⁶⁰Calgary DNA Analysis. 2017. Retrieved from <https://www.visitcalgary.com/industry-partners/programs-resources/brand-evolution>

⁶¹New Experience Economy Research (2020, June). Stone-Olafson. Retrieved from <https://www.stone-olafson.com/thenewexperienceeconomy>

⁶² City of Calgary Attitudes and Outlook Survey.
Retrieved from <https://www.calgary.ca/content/dam/www/cfod/csc/documents/fall2020-csr/2020-Calgary-Attitudes-and-Outlook-Survey-FINAL-Report.pdf>

⁶³ To do so we allocated 2 points for all attributes that were scored by the research team as “full”, 1 point to attributes scored as “partial” and no points if it was deemed to be a “no”. Each column could score a maximum of 32 points. We then transformed each column to a percentage.

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