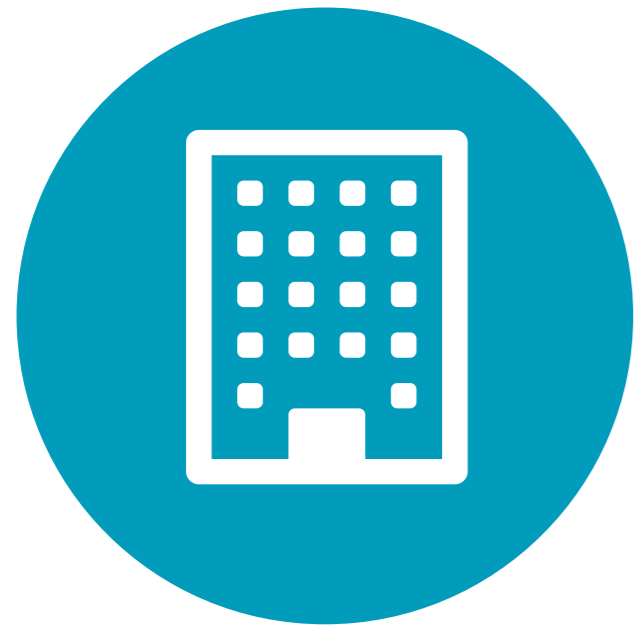




labour market

Workforce Attraction



Ranking of 150
global cities



Calgary ranked in the
global **Top 10 Most
Attractive Cities for
Workers**



Financial (salary
levels, living costs,
taxes) + Lifestyle
(quality of living,
social benefits)

Key Stats



Of 8 peer cities assessed, Calgary has the highest level of **educational attainment**.

- Deloitte, *Benchmarking Calgary's Competitiveness*, 2015



Calgary has the highest **labour force productivity and labour force participation** of major Canadian cities.

- The Conference Board of Canada and Statistics Canada, 2017



Calgary has the highest proportion of **STEM graduates** of major Canadian cities.

- Census 2016, Statistics Canada



Calgary has the highest **millionaires per capita** of major Canadian cities.

- Statistics Canada, 2016



Calgary has the highest number of **engineers and geoscientists per capita** of major Canadian cities.

- Statistics Canada, 2017



Calgary is ranked as a **top tech talent market** in Canada.

- Scoring Canadian Tech Talent, CBRE, 2017

Labour Demand



ICT is outpacing all job growth by 4:1. Canada will need to fill 216,000 ICT professional positions by 2021.

- ICTC, Labour Market Outlook, 2017-2021, April 2017



Finance, Insurance, Real Estate and Leasing will grow by 1.6% annually, reaching 4.8% of total employment in 2019 and gain 68,100 jobs by 2024.

- Government of Alberta, 2016; Statistics Canada, 2016



Manufacturing accounts for 6.1% of total employment in Alberta, employment will grow by 1.1% annually and account for 6.5% of total employment by 2019.

- Government of Alberta, 2016



The **Logistics** sector in Alberta will grow by about 7,470 workers from 2016 to 2025.

- APGC, 2016



Oil and Gas will require 11,100 workers in a modest recovery scenario and 15,400 in a delayed recovery scenario between 2018 to 2021.

- PETROLMI/ENFORM, March 2017



Clean Tech (including Renewables) will employ anywhere from 76,000 to 100,000 Canadians directly by 2022, up from 55,600 jobs in 2014.

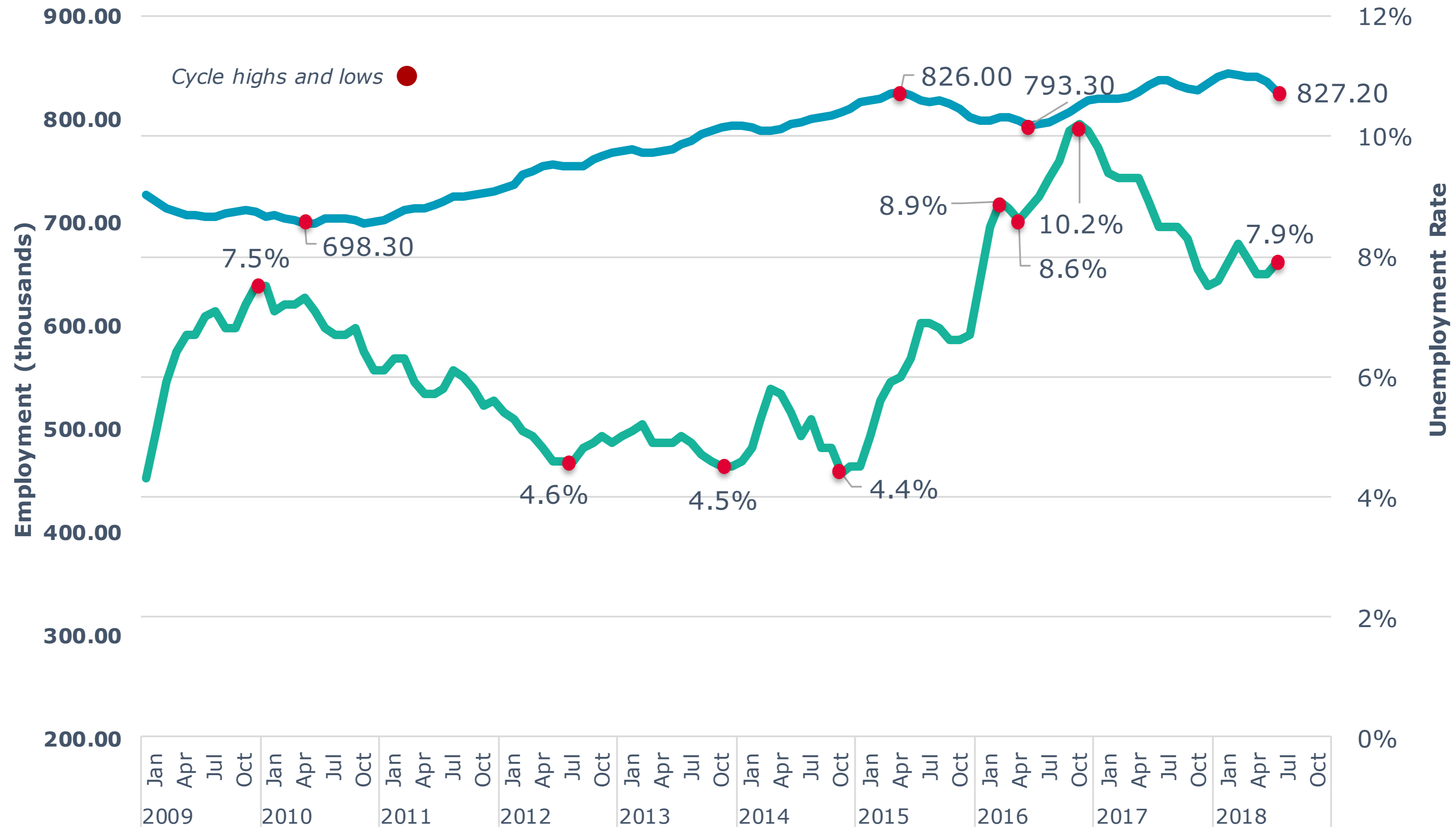
- Analytica Advisors, 2016



Agriculture will need to fill 23,300 potential jobs in Alberta by 2025.

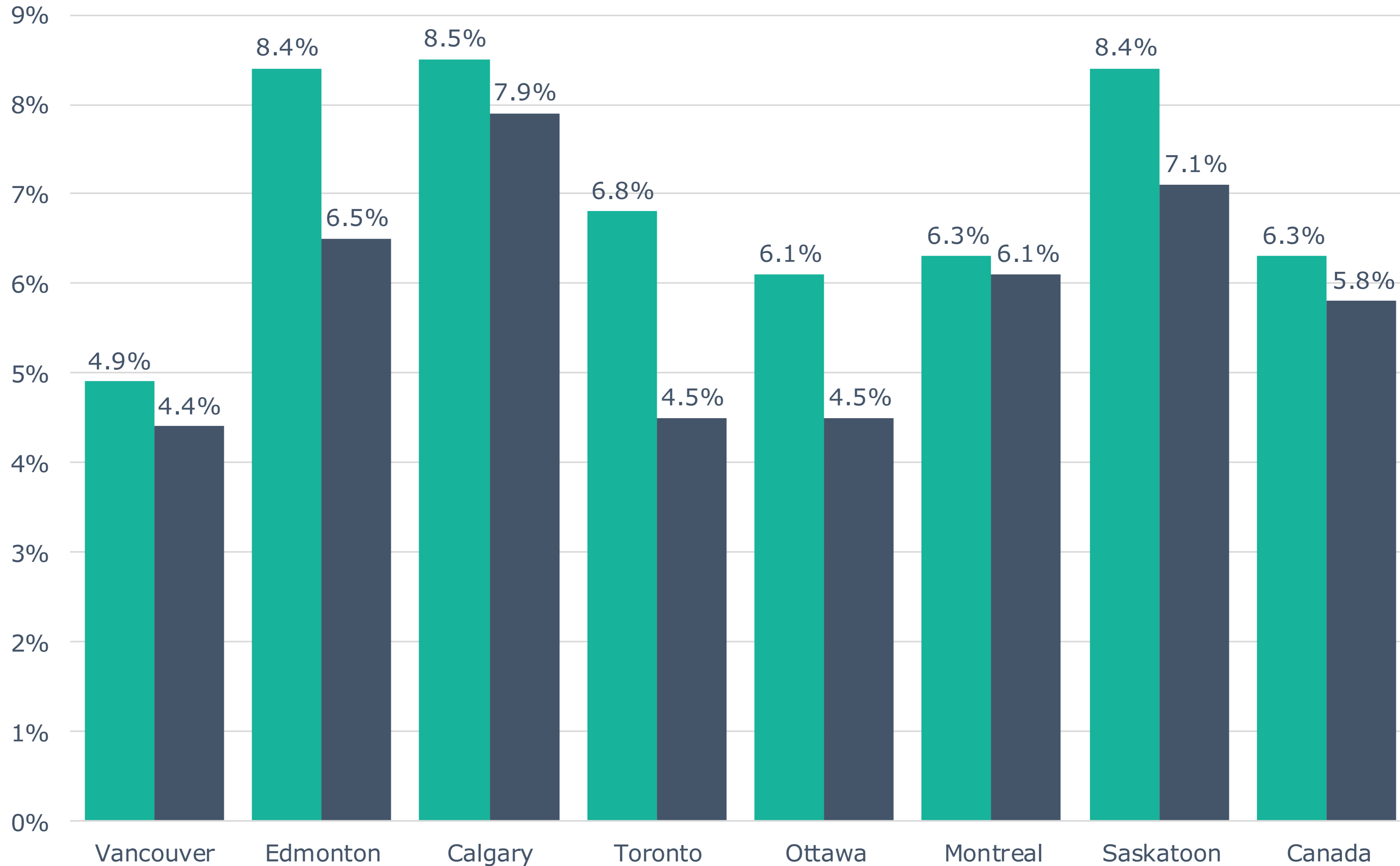
- AgriLMI CAHRC, 2016

Calgary CMA Historical Unemployment Rate & Level of Employment



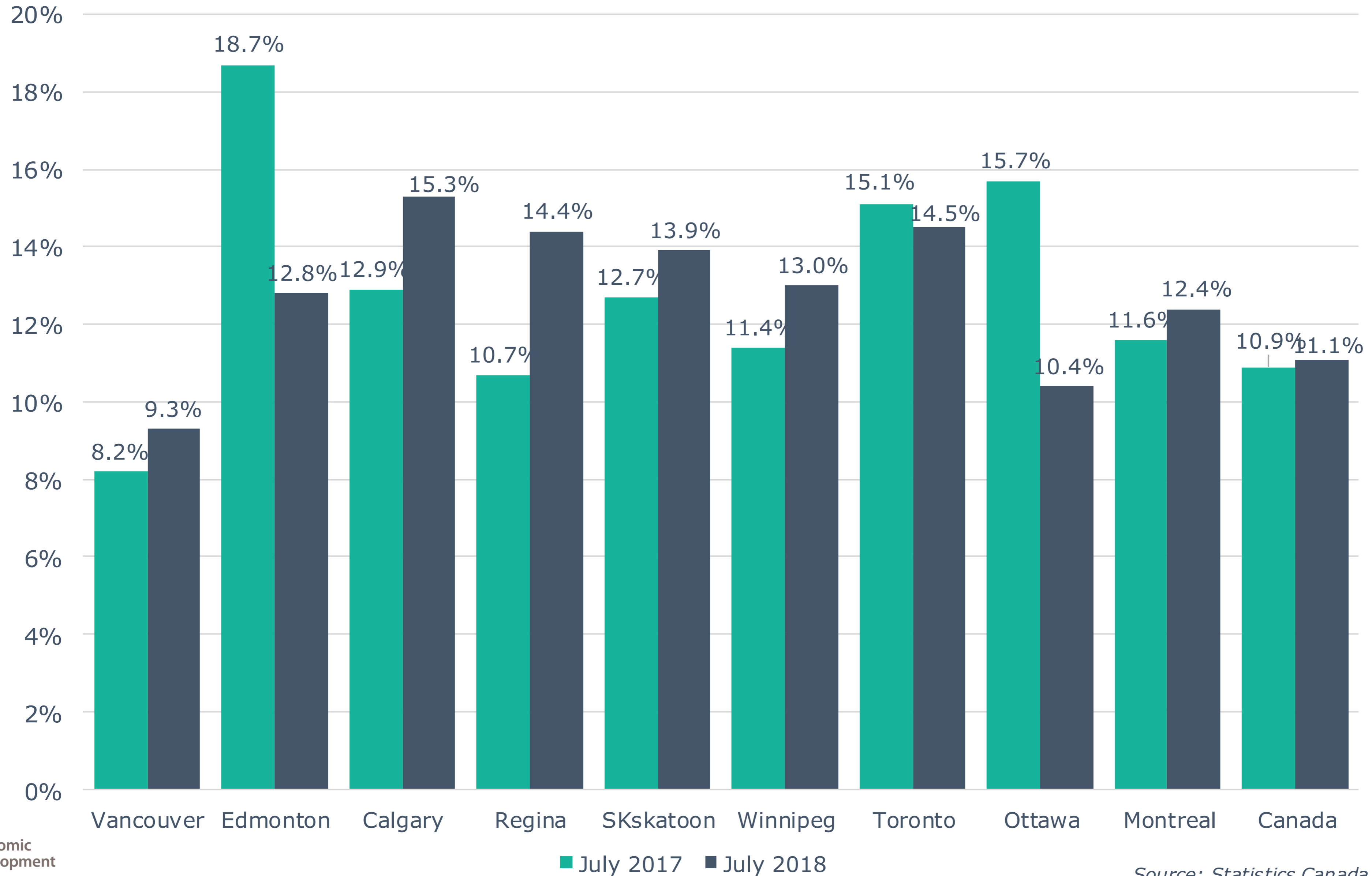
Source: Statistics Canada, July 2018

Unemployment Rate Across Canada



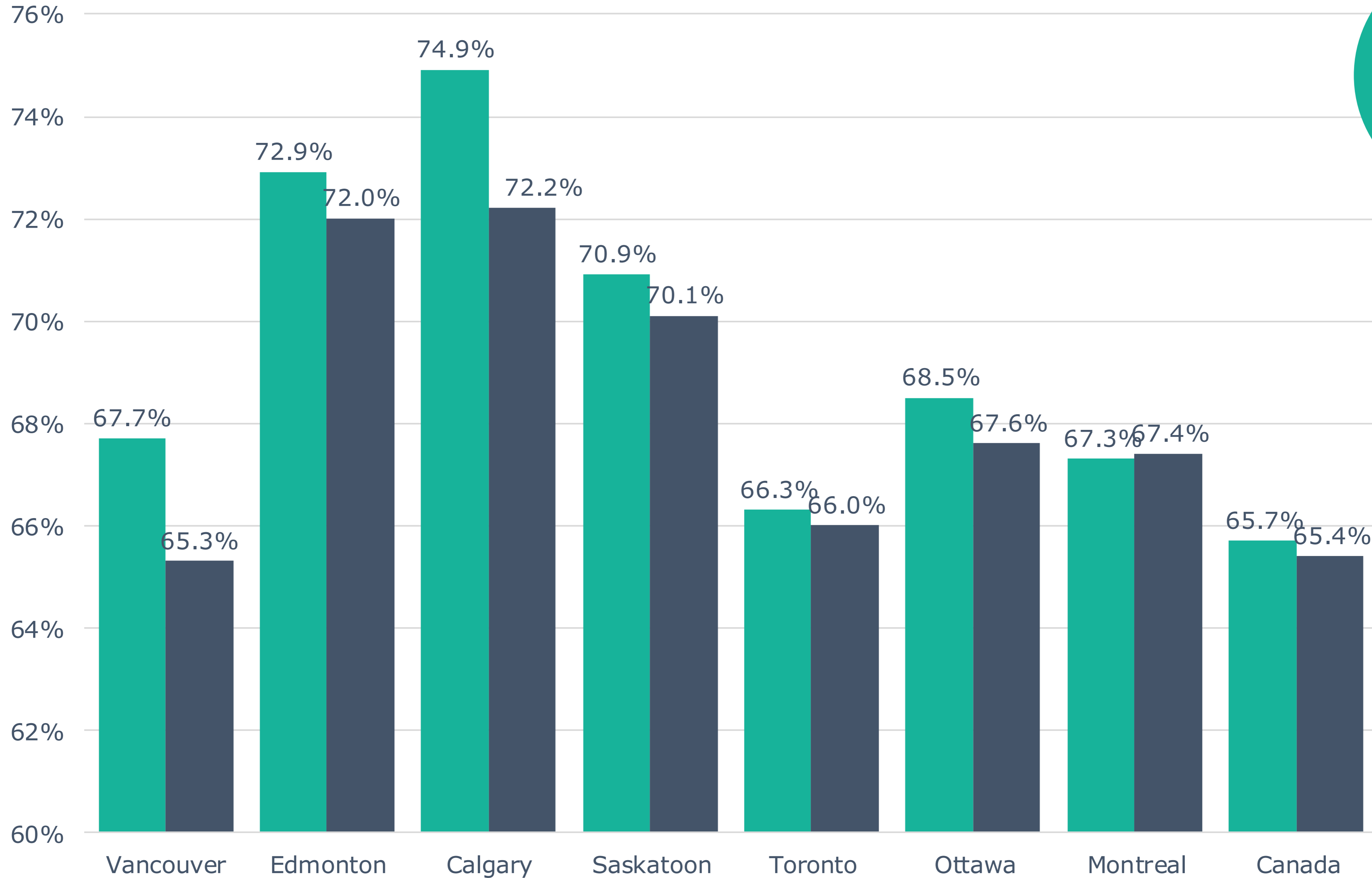
Youth Unemployment Rate Across Canada

(Ages: 15 to 24 Years)

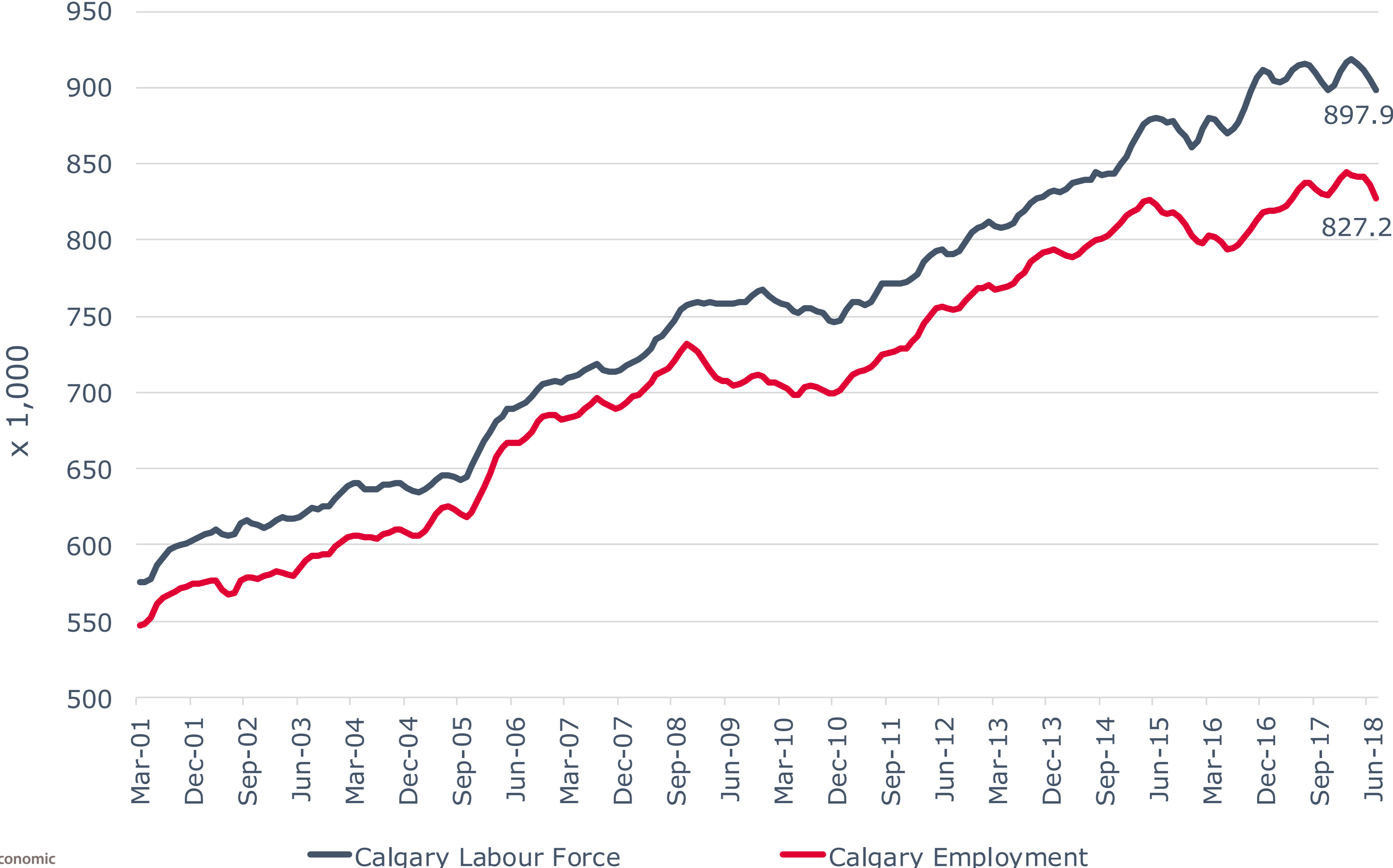


Labour Force Participation Rate Across Canada

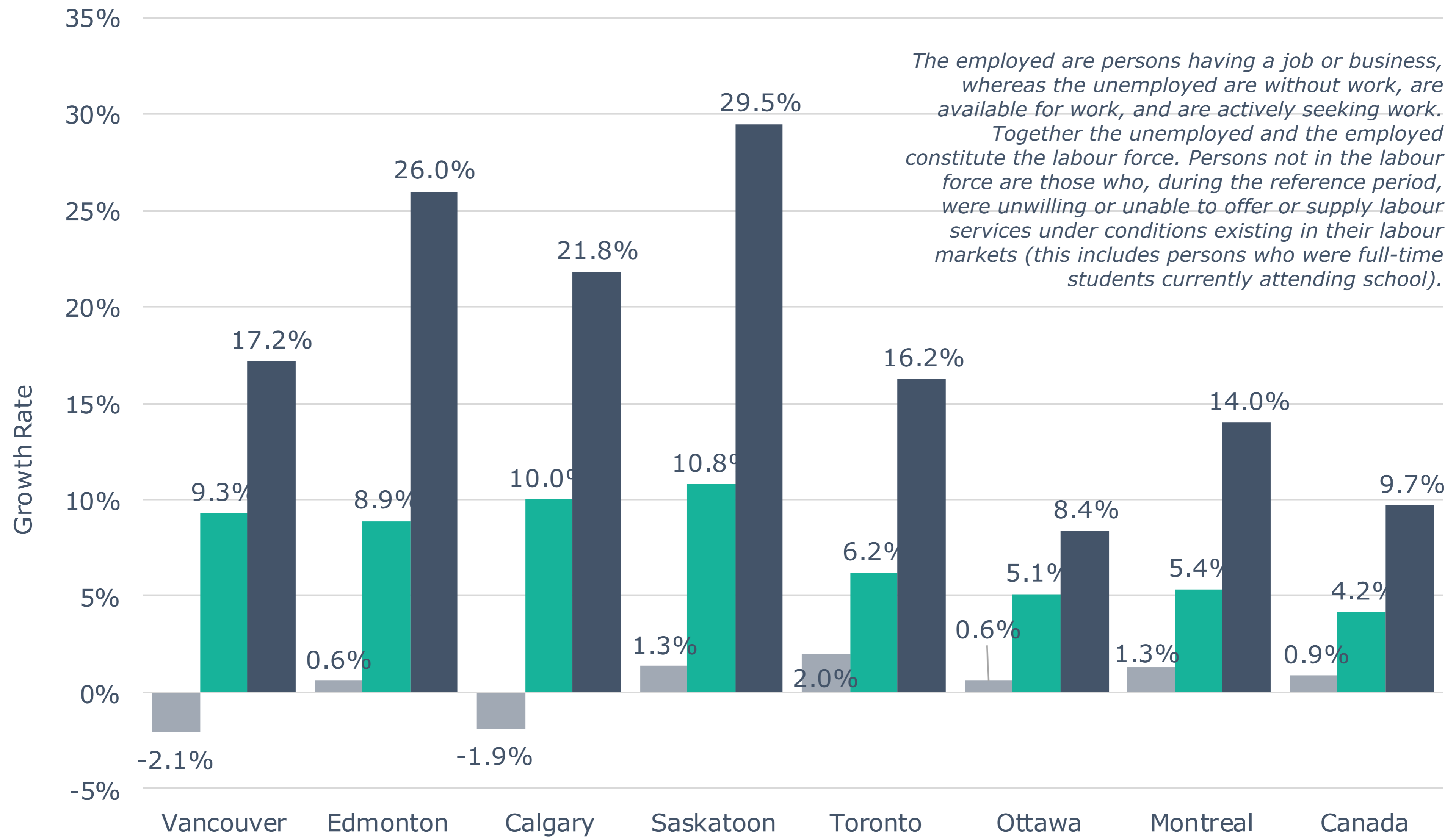
Highest labour force participation rate in Canada



Calgary Labour Force and Employment

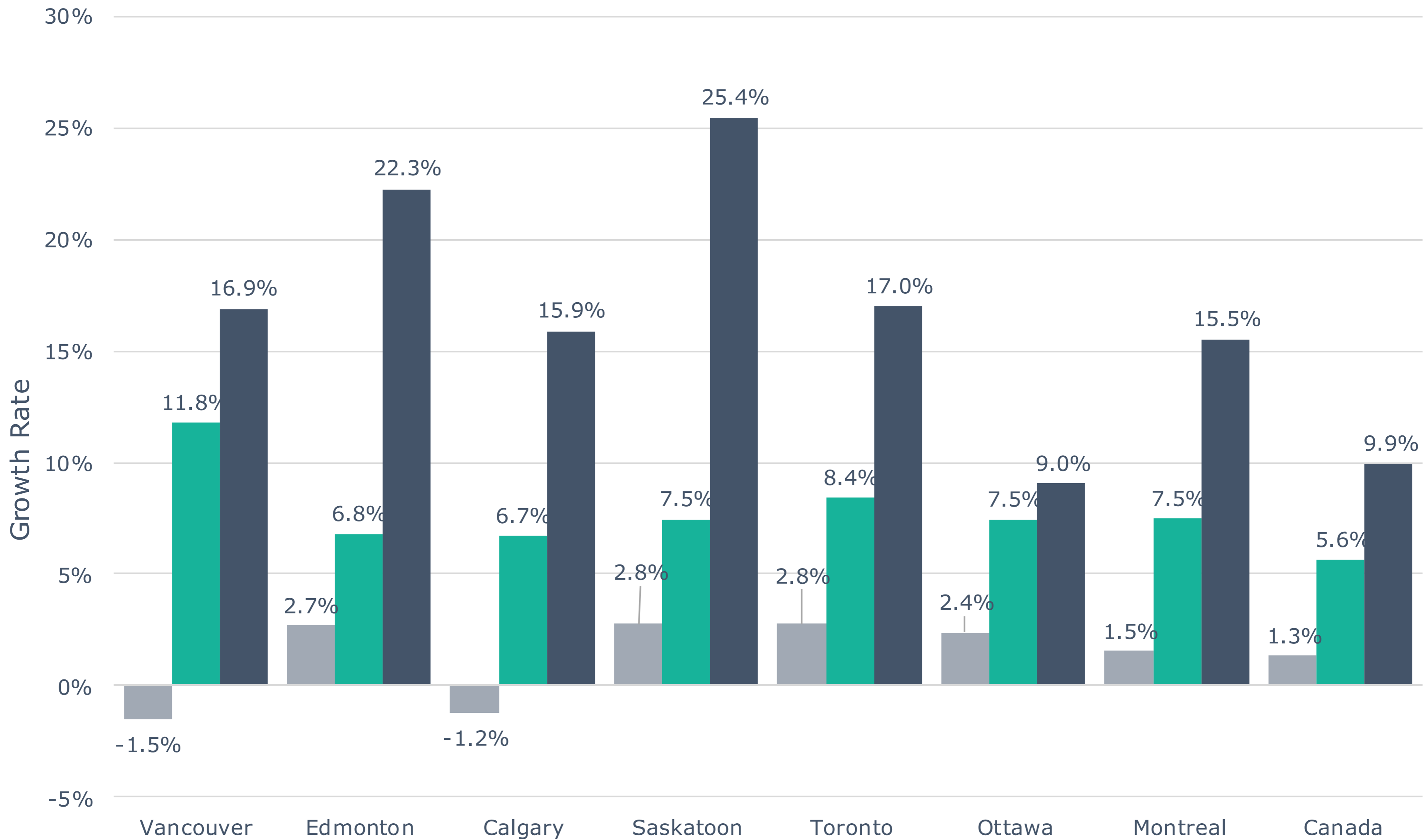


Labour Force Growth Across Canada

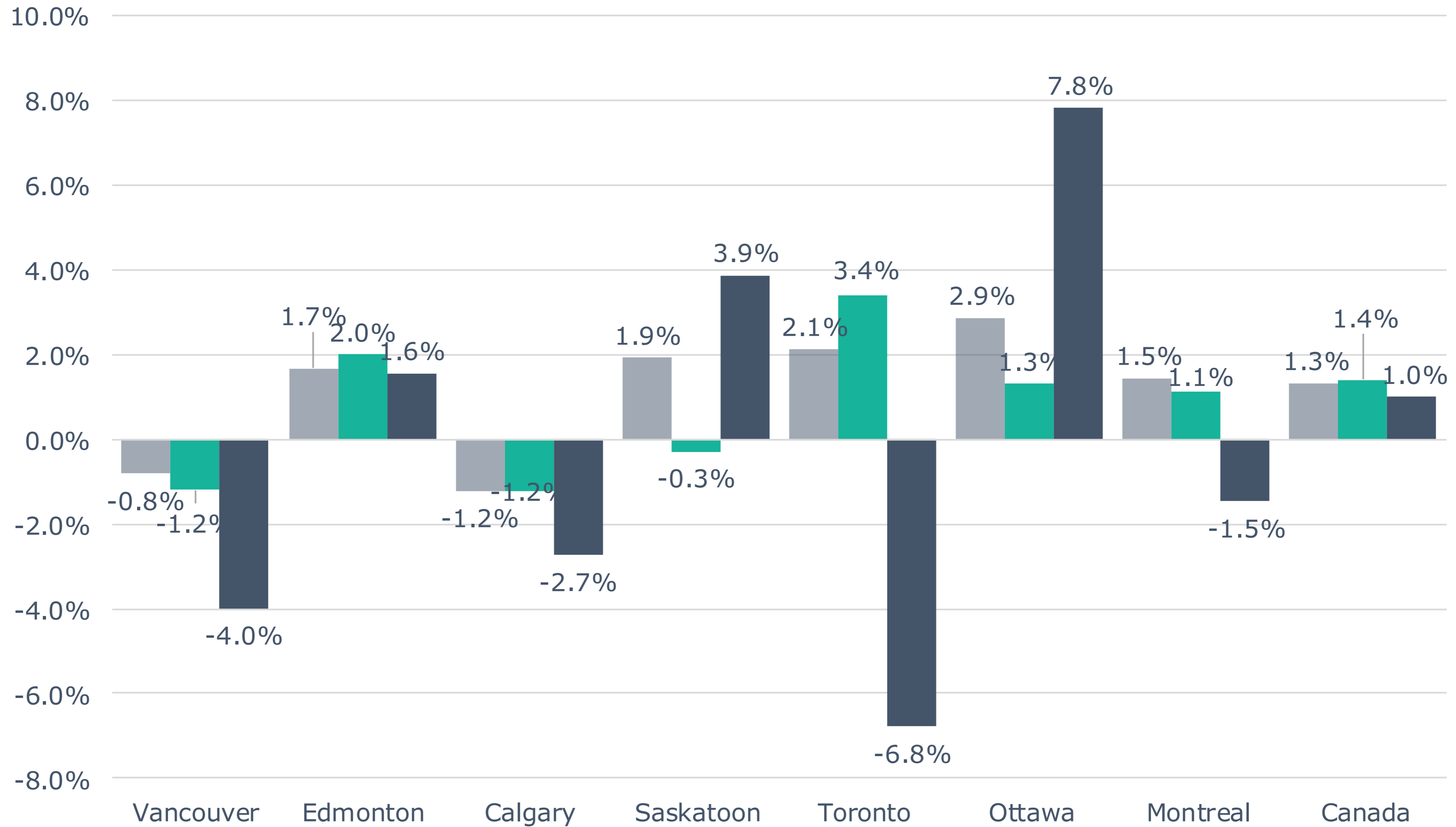


■ 12-Month Labour Force Growth ■ 5-Year Labour Force Growth ■ 10-Year Labour Force Growth

Employment Growth Across Canada



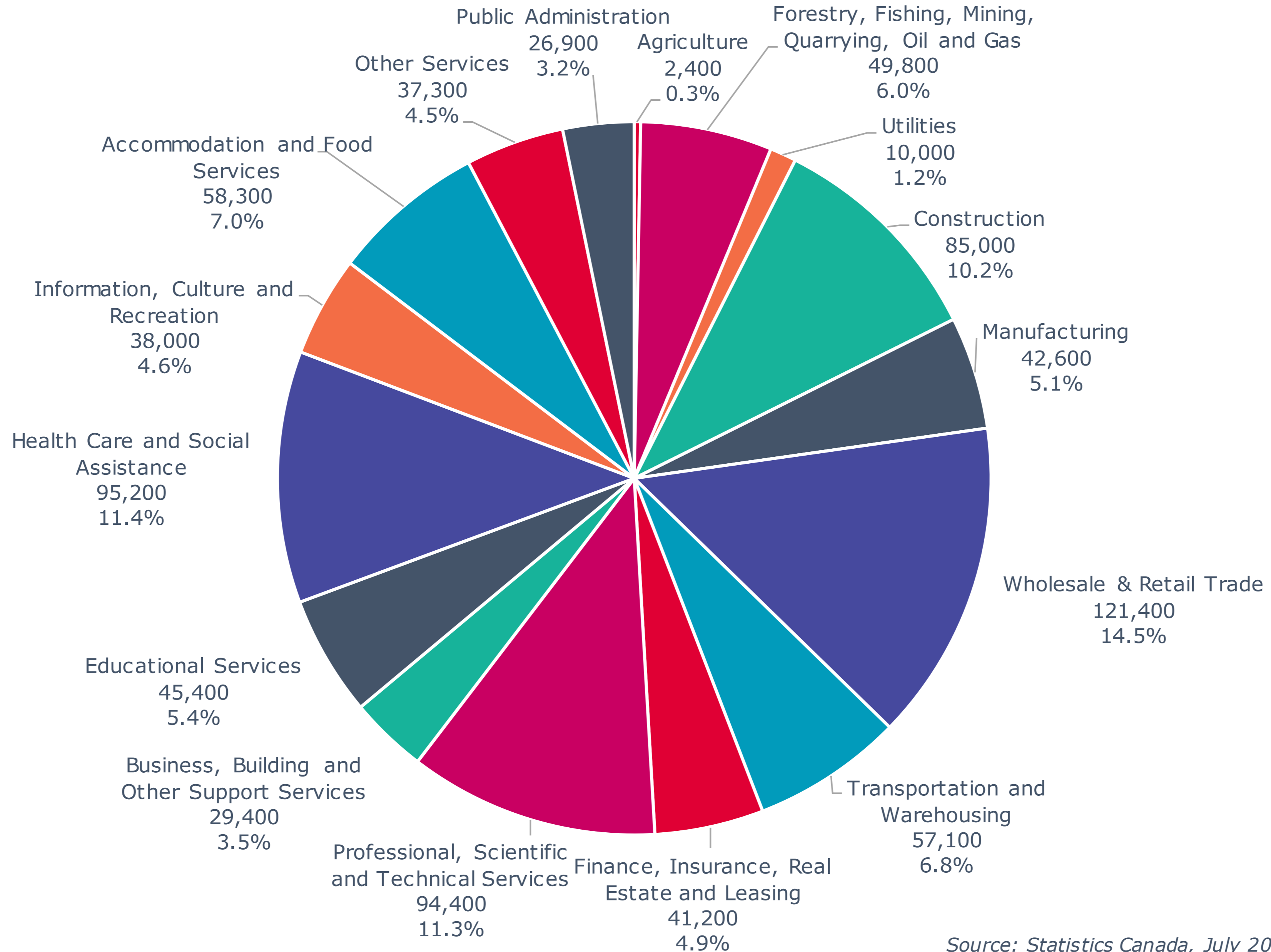
Annual Employment Growth



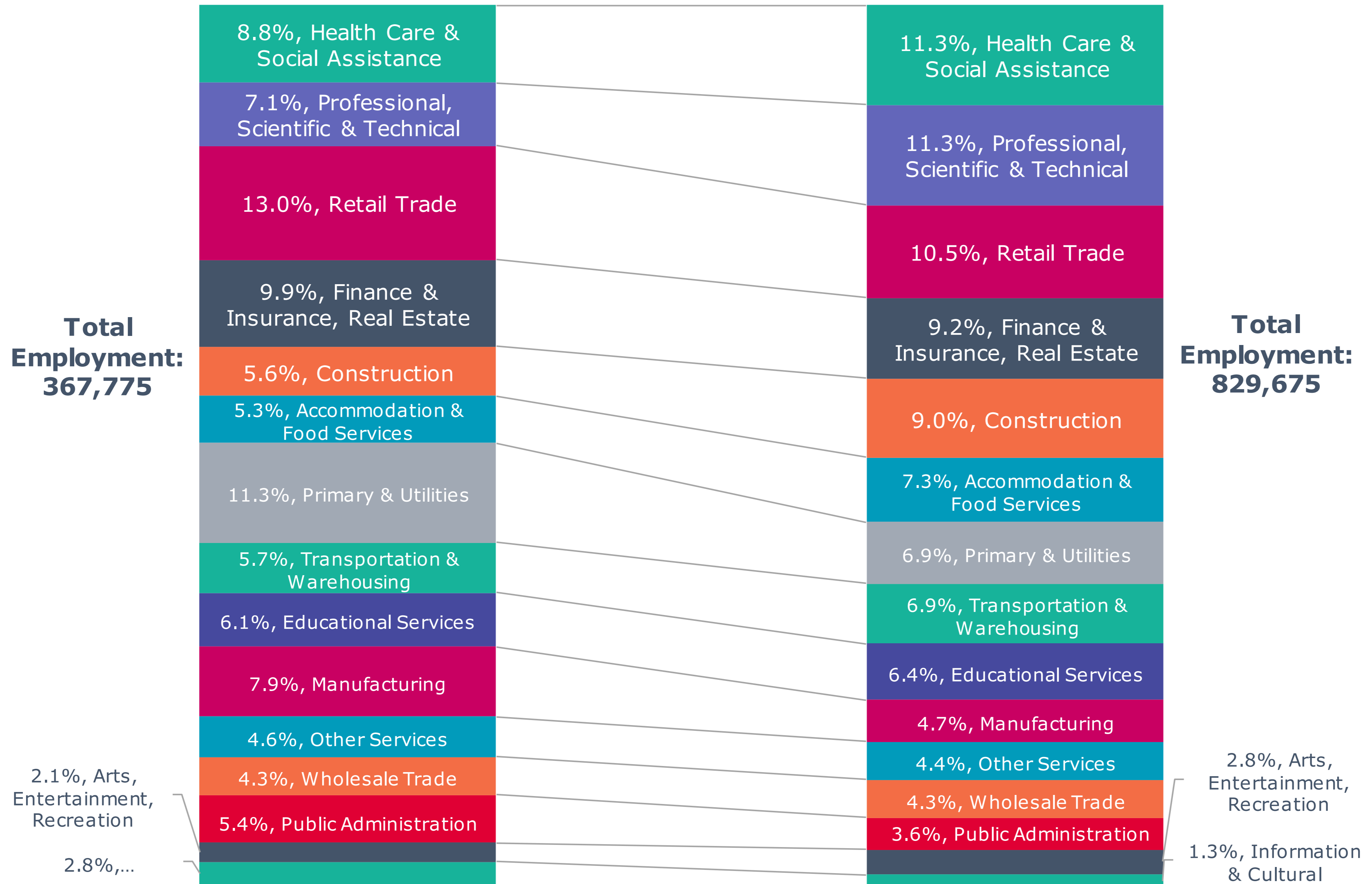
■ Total Employment Growth Rate
 ■ Full-Time Employment Growth Rate
 ■ Part-Time Employment Growth Rate

Calgary CMA Employment by Industry (827,200)

Diverse employment



Calgary Historical Employment by Industry



Total Employment:
367,775

Total Employment:
829,675

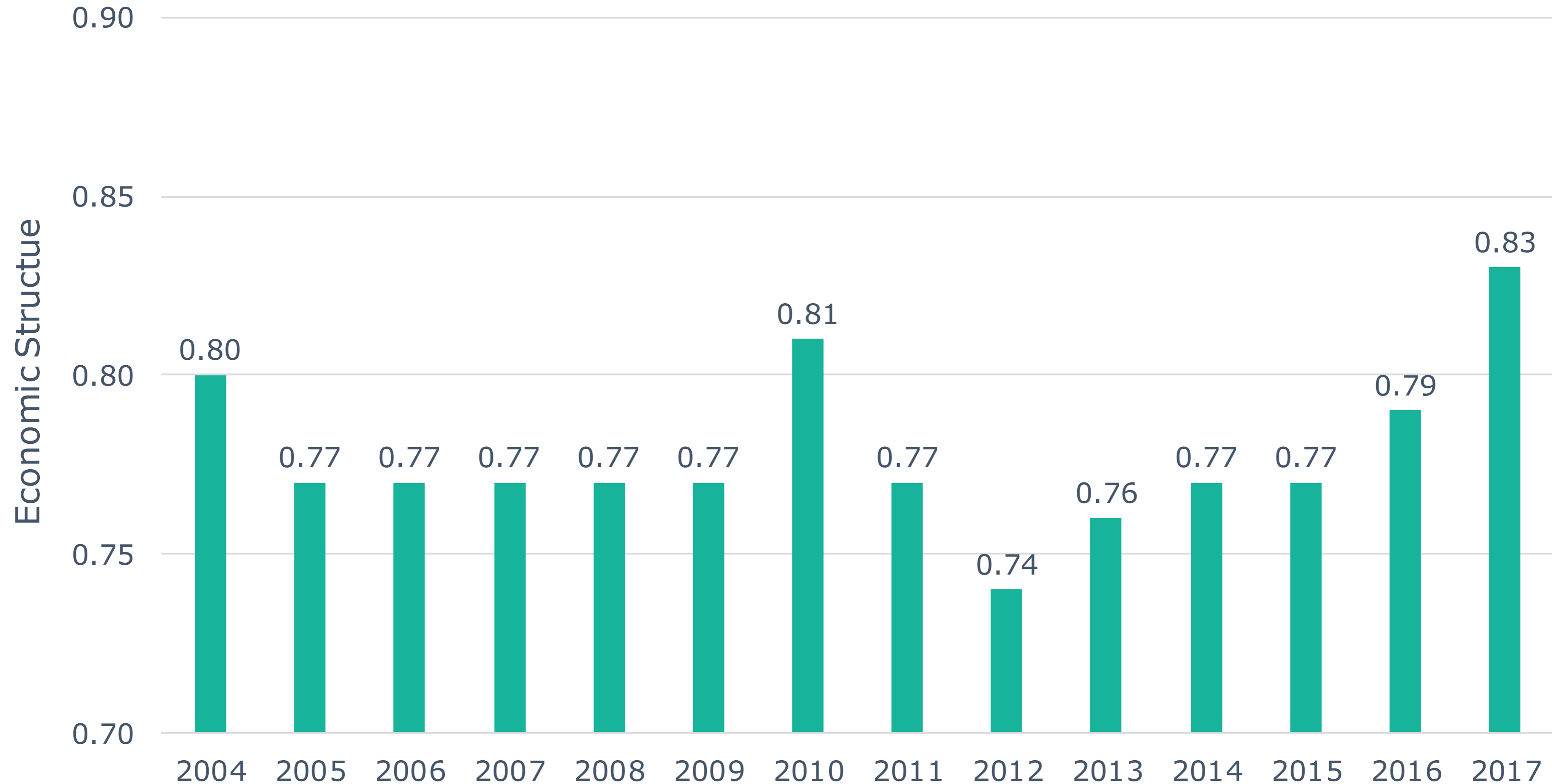
1987

2017

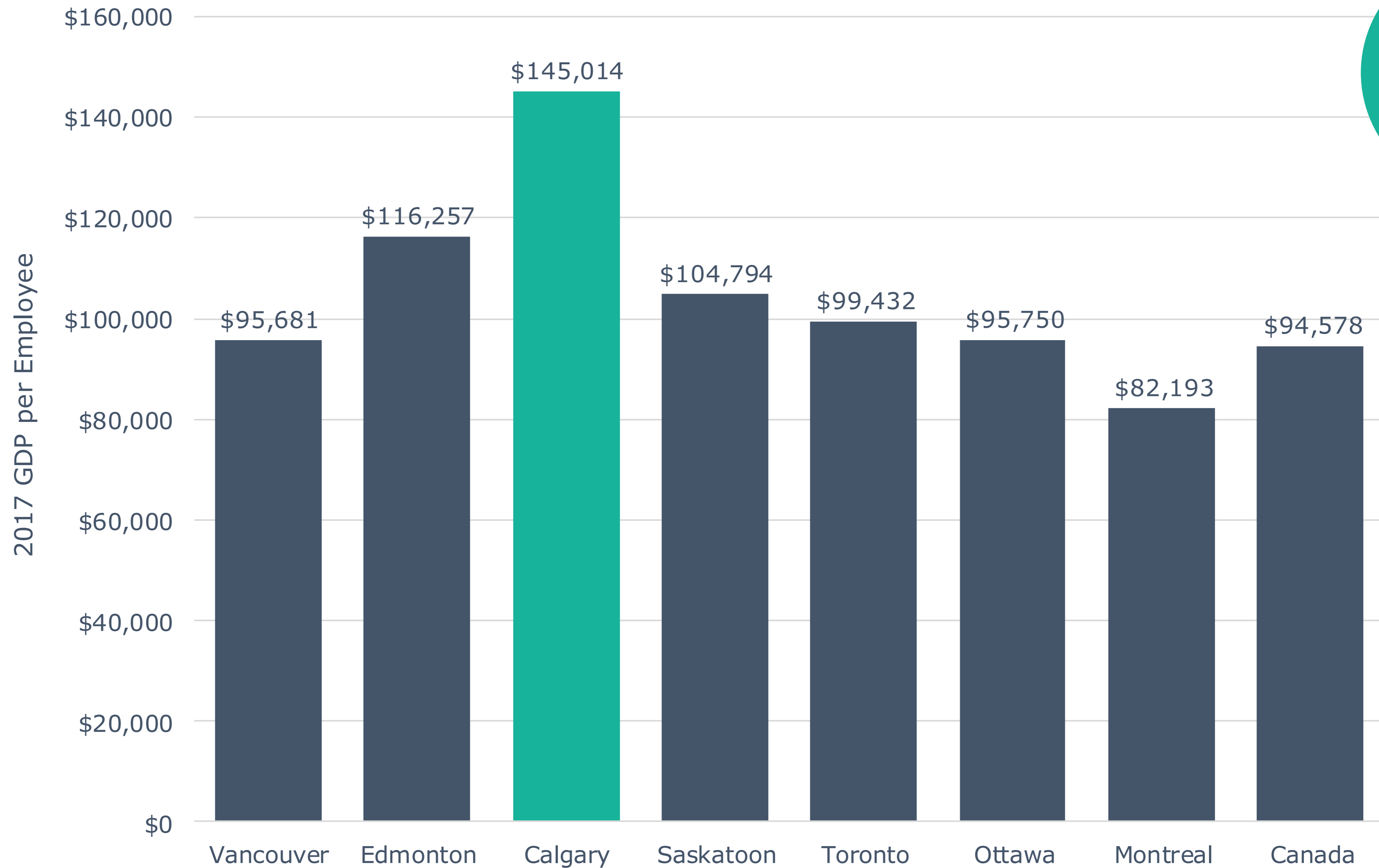
Source: Conference Board of Canada, June 2018

Calgary's Economic Diversity

Economic Structure is a measure of **economic diversity**. Using the Hachman Index and employment by industry data, this measure benchmarks the economic structure of Calgary to that of Canada as a whole. The higher the number the higher the implied diversity in employment (highly diverse =1 and not diverse =0). For example, if Calgary's economic structure were exactly like Canada's then it would score a 1. If it were nothing like Canada's it would score a 0. We can say, **over the years Calgary has become more diverse in employment - more than it has ever been before!**

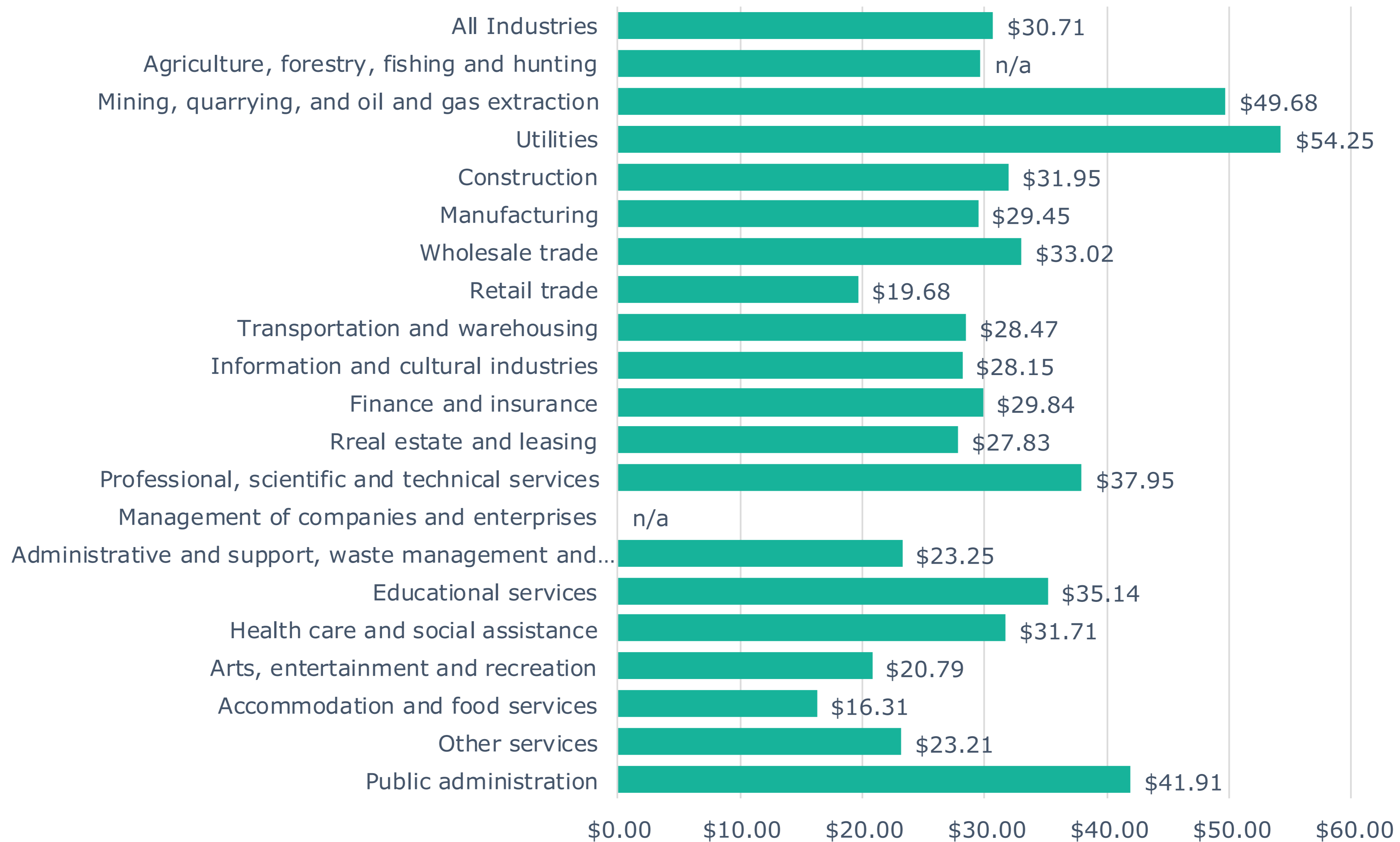


Labour Force Productivity

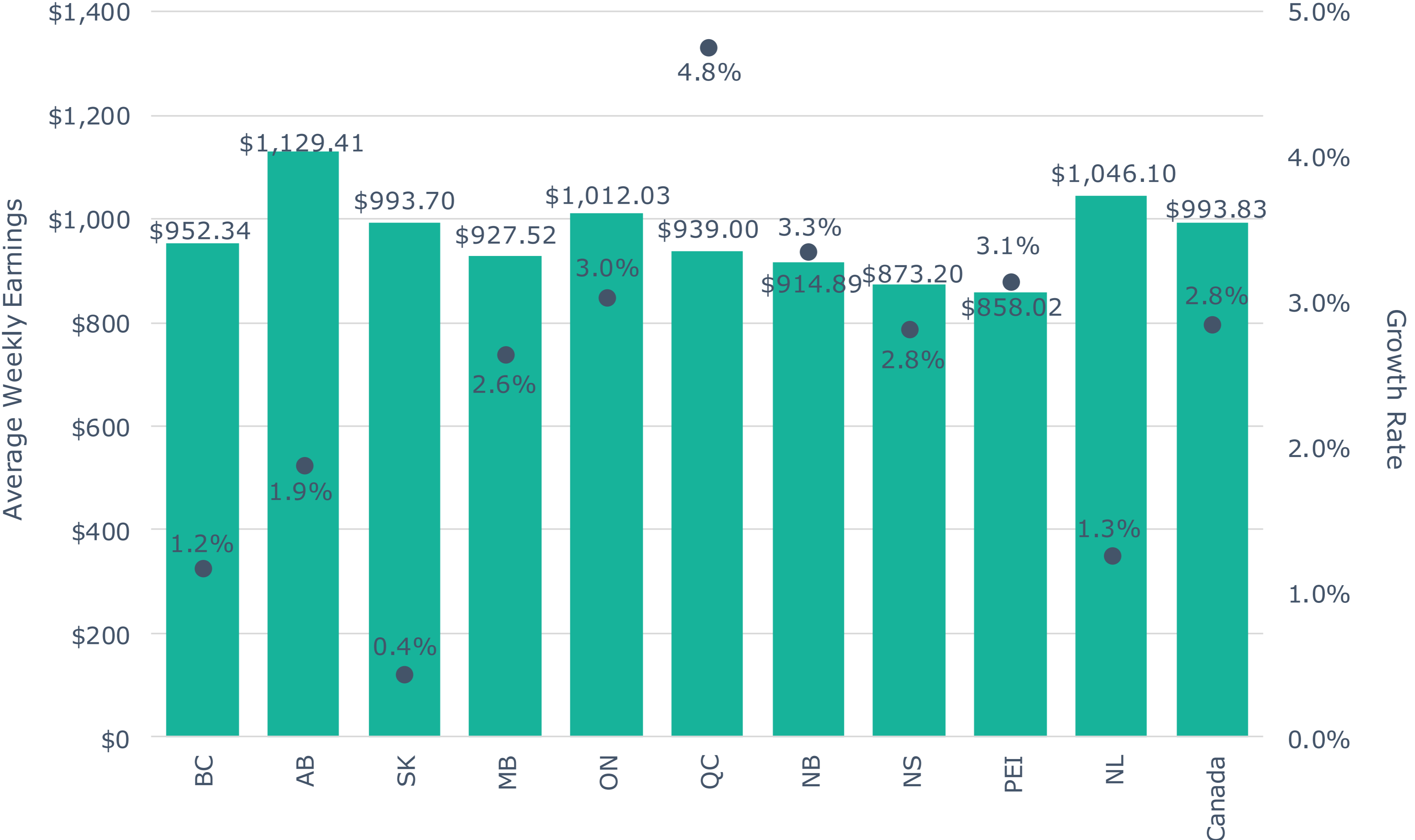


**Most
productive
workforce in
Canada**

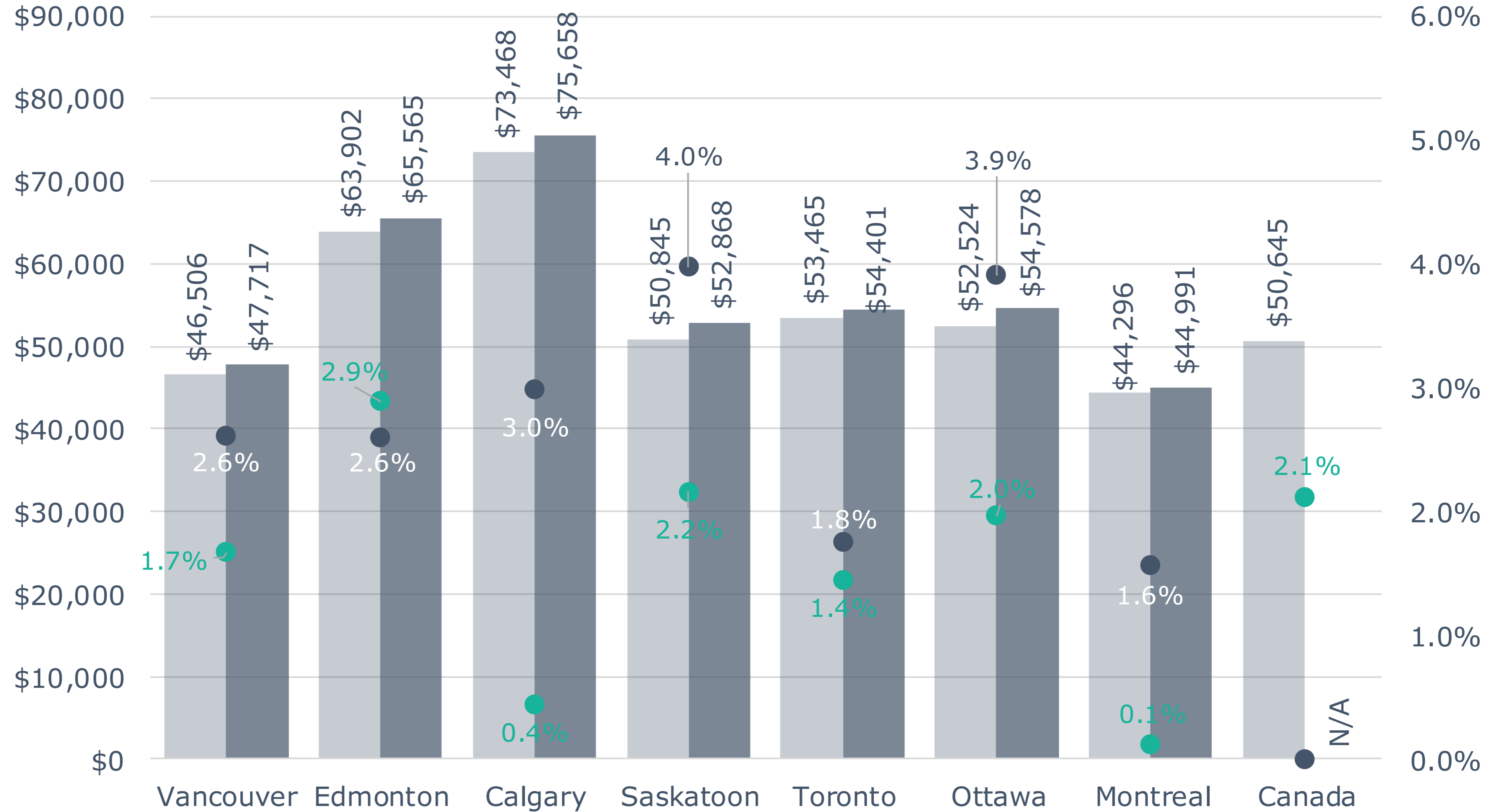
Calgary CMA Average Overall Hourly Wages by Industry



Average Weekly Earnings Across Canada and Growth Rates



Average Wages and Salaries Across Canada



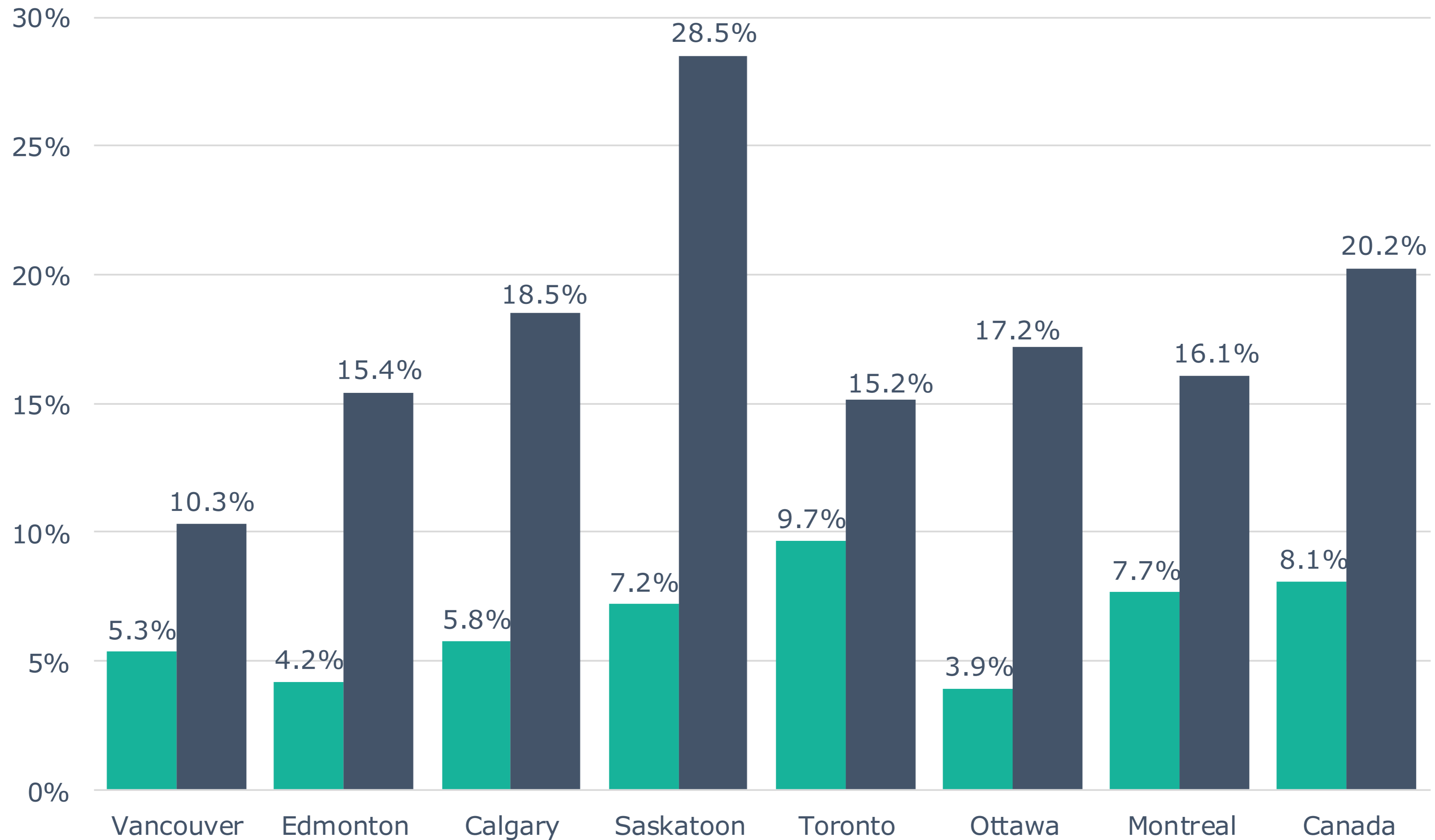
■ 2017F Average Wages and Salaries per Employee

■ 2018F Average Wages and Salaries per Employee

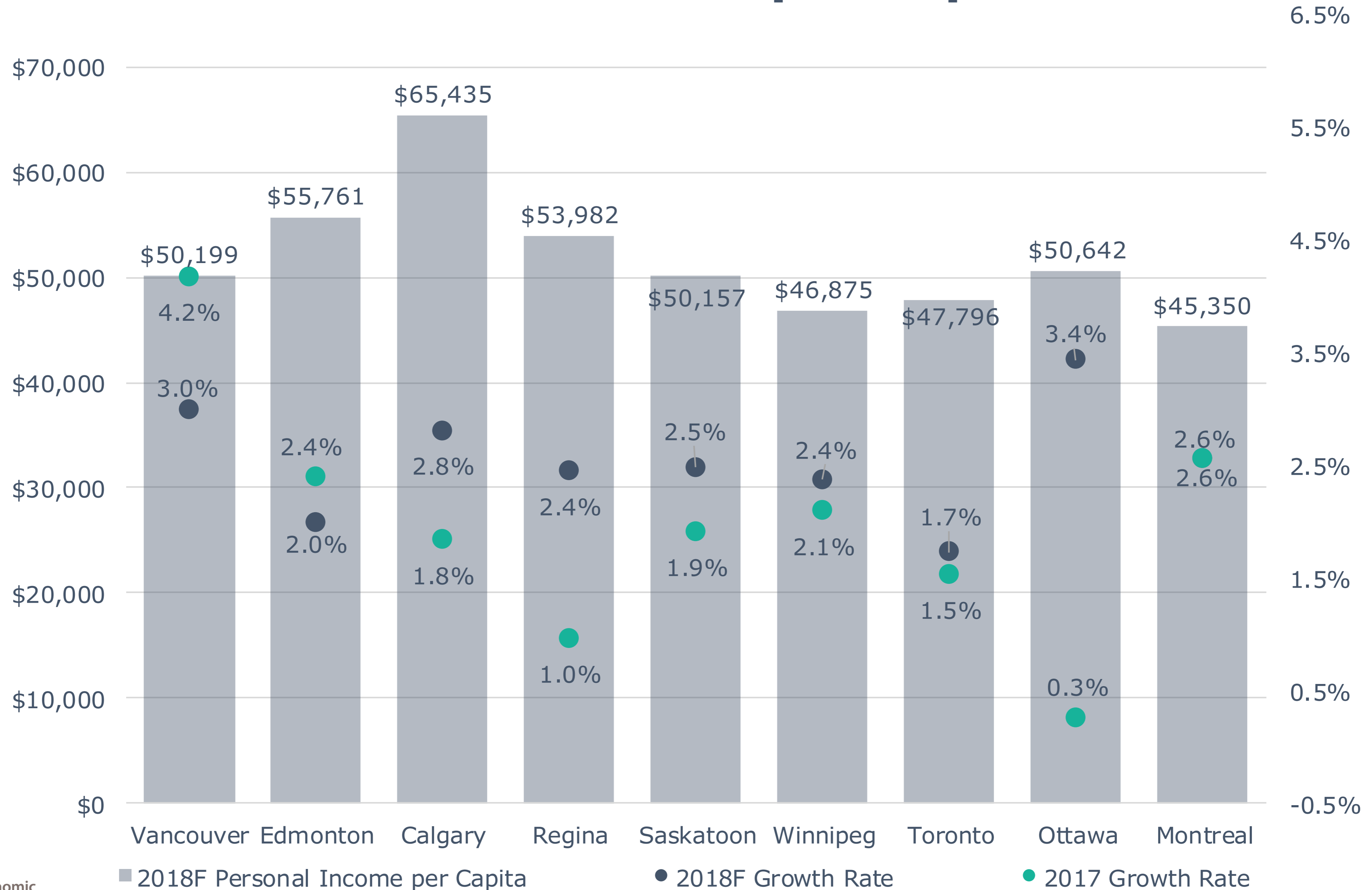
● 2018F Growth Rate

● 2017 Growth Rate

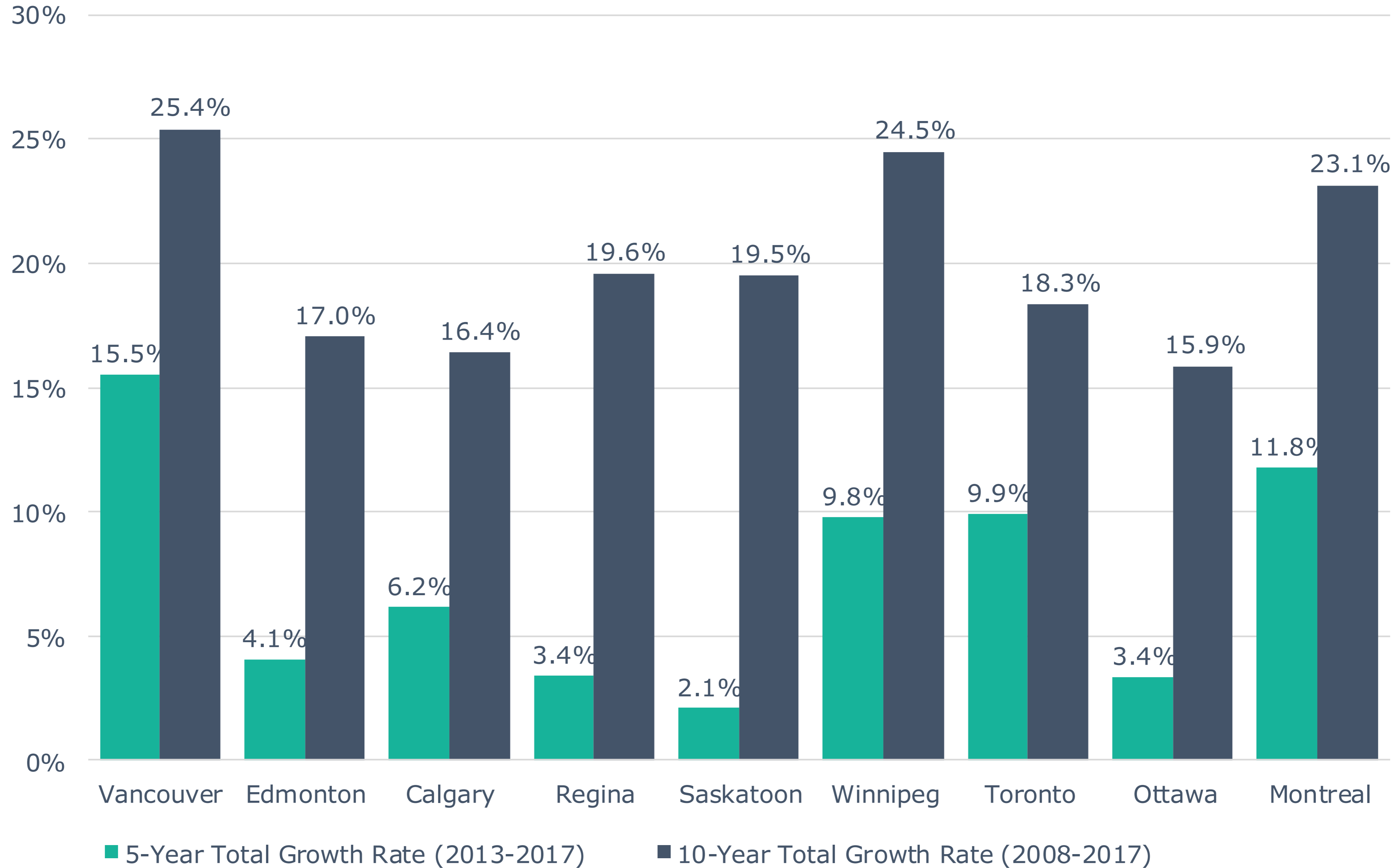
Average Wages and Salaries Growth Rates Across Canada



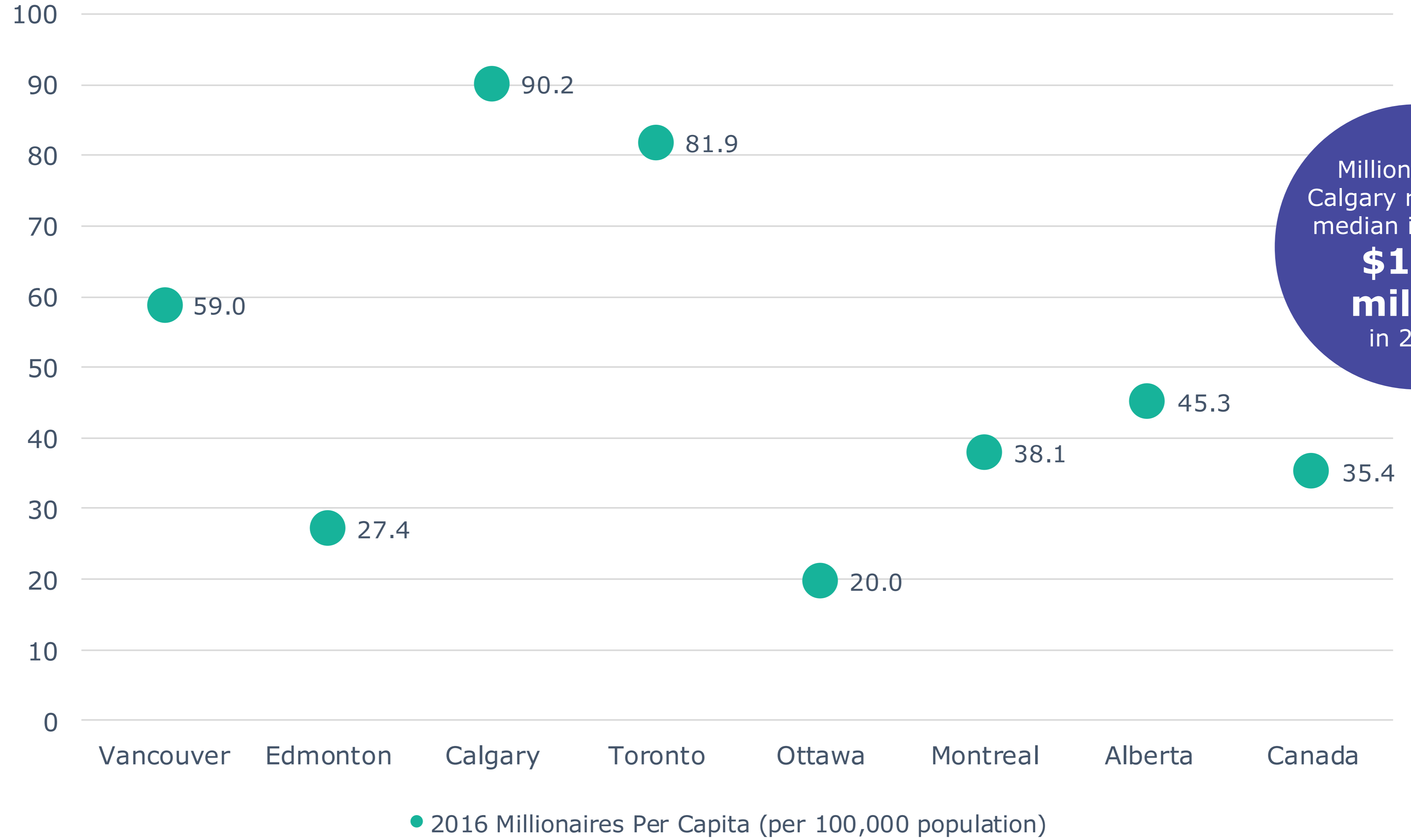
Personal Income per Capita



Personal Income per Capita Historical Growth Rates



Millionaires Per Capita



Millionaires in Calgary reported a median income of **\$1.42 million** in 2016.

