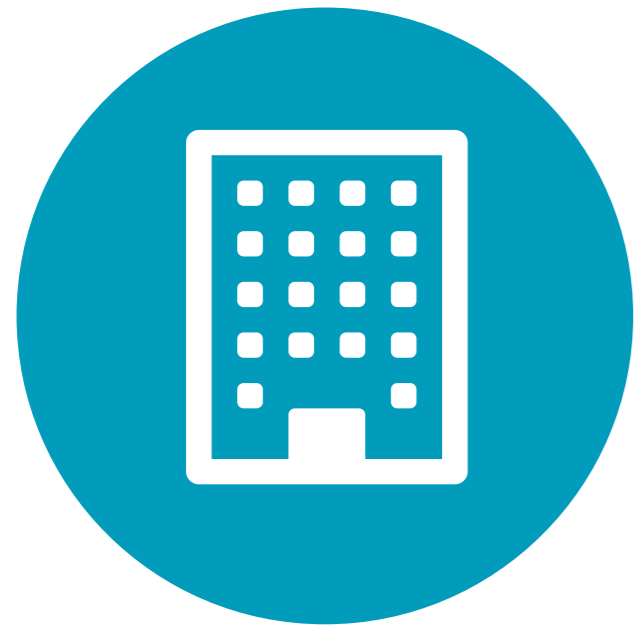




labour market

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 has the **highest concentration of high-tech workers** of Canadian cities

- *Who Are Canada's Tech Workers*, Brookfield Institute, January 2019

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.

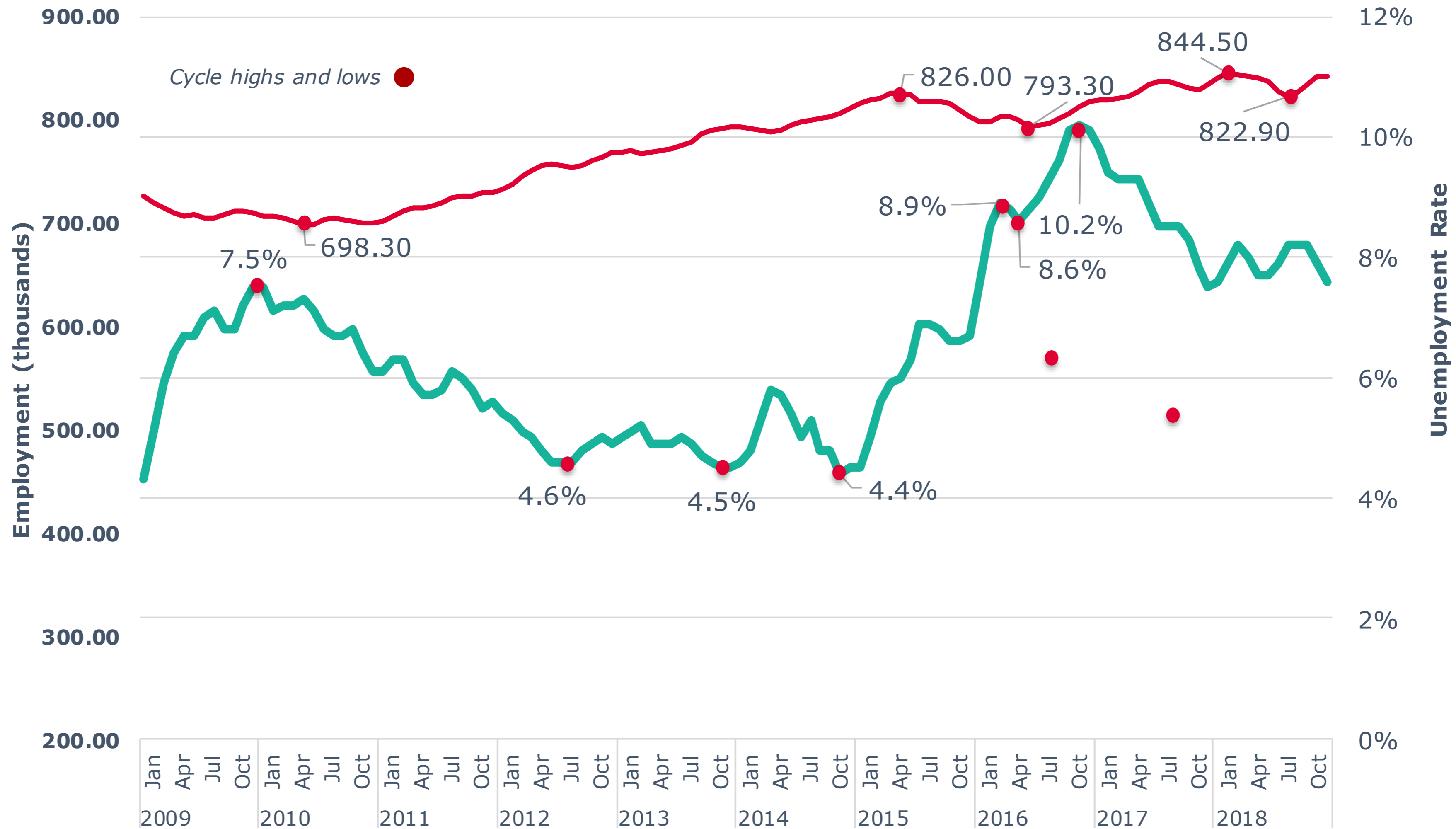
- Analytica Advisors, 2016



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

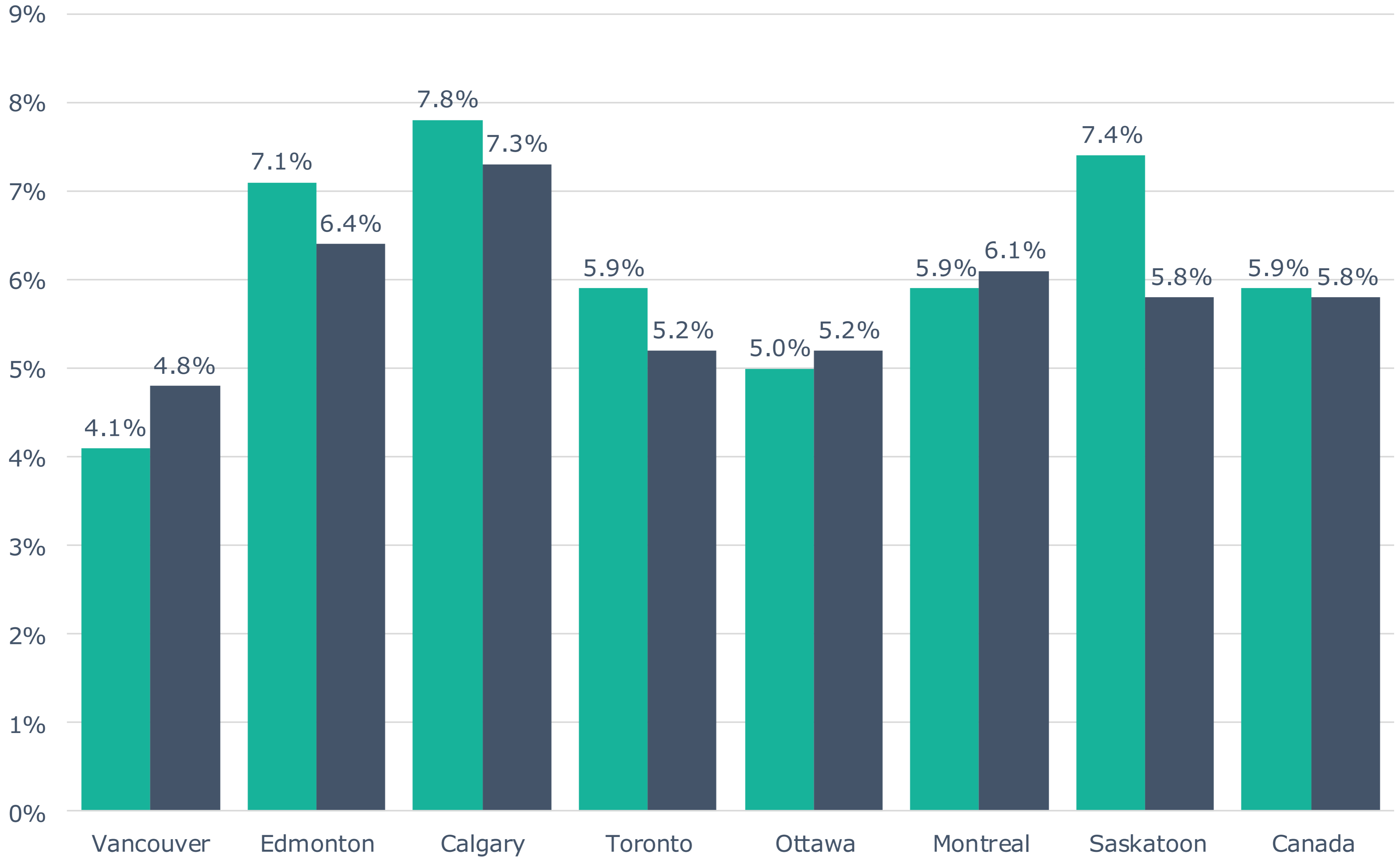
- AgriLMI CAHRC, 2016

Calgary CMA Historical Unemployment Rate & Level of Employment



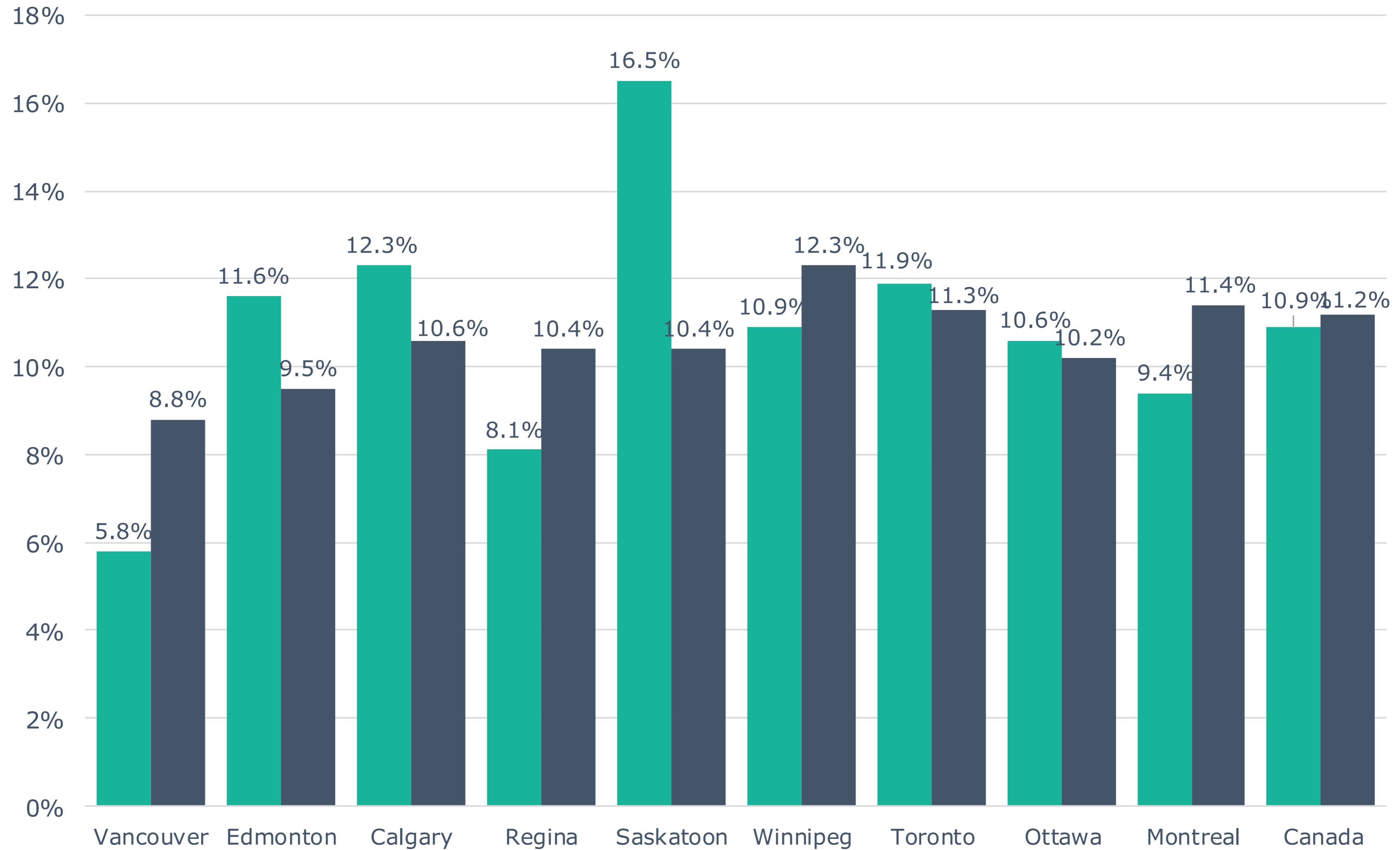
Source: Statistics Canada, January 2019

Unemployment Rate Across Canada



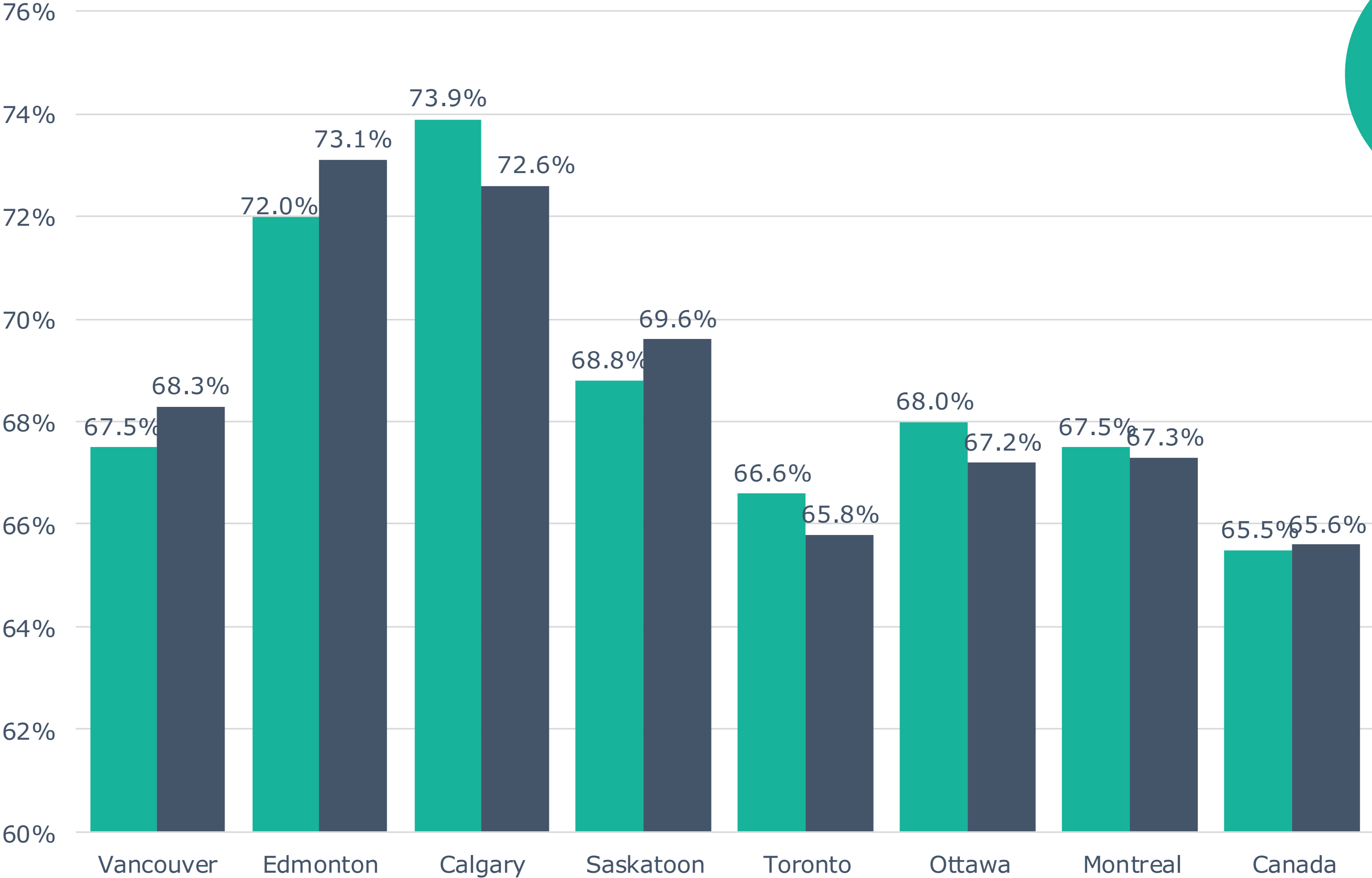
Youth Unemployment Rate Across Canada

(Ages: 15 to 24 Years)

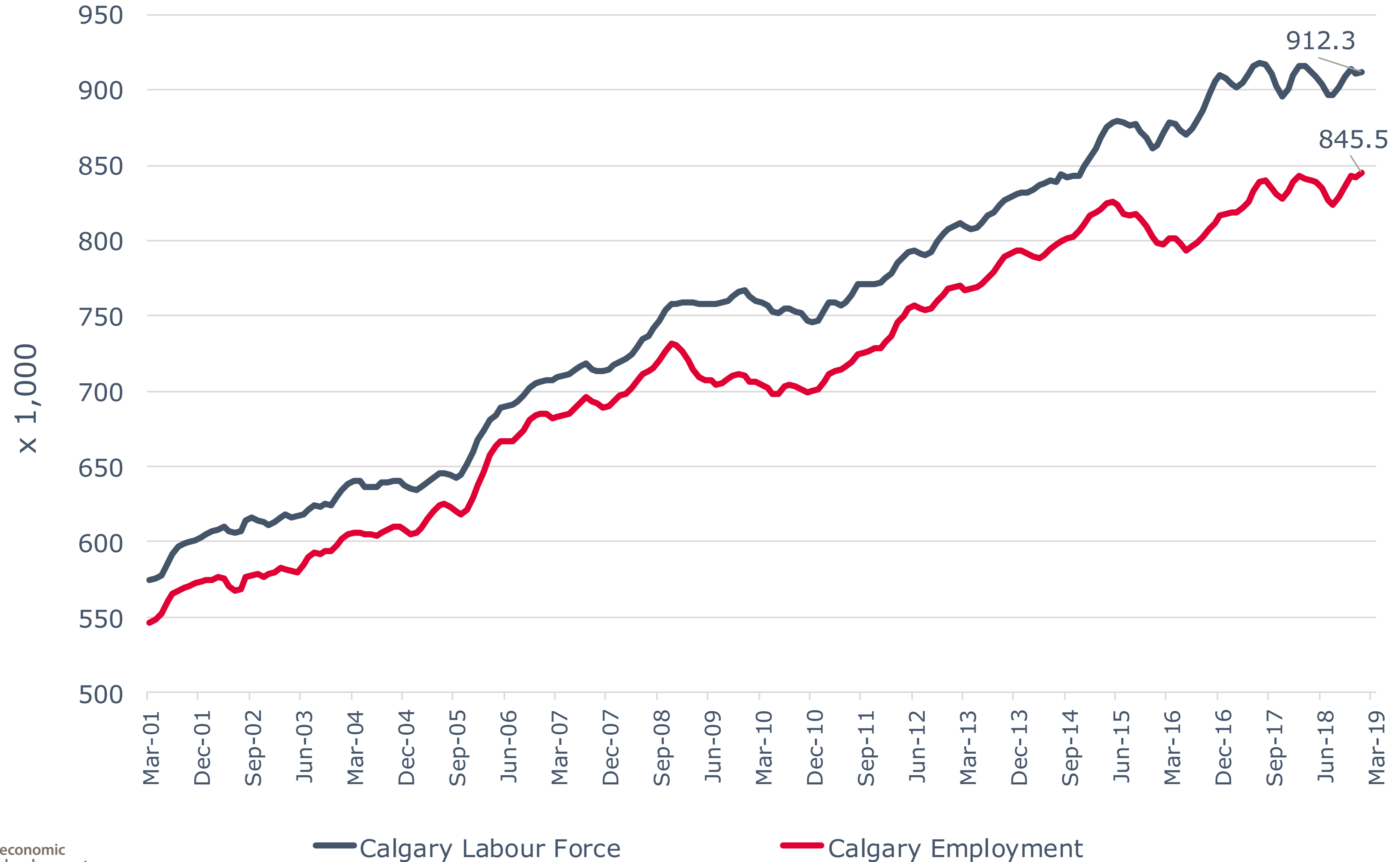


Labour Force Participation Rate Across Canada

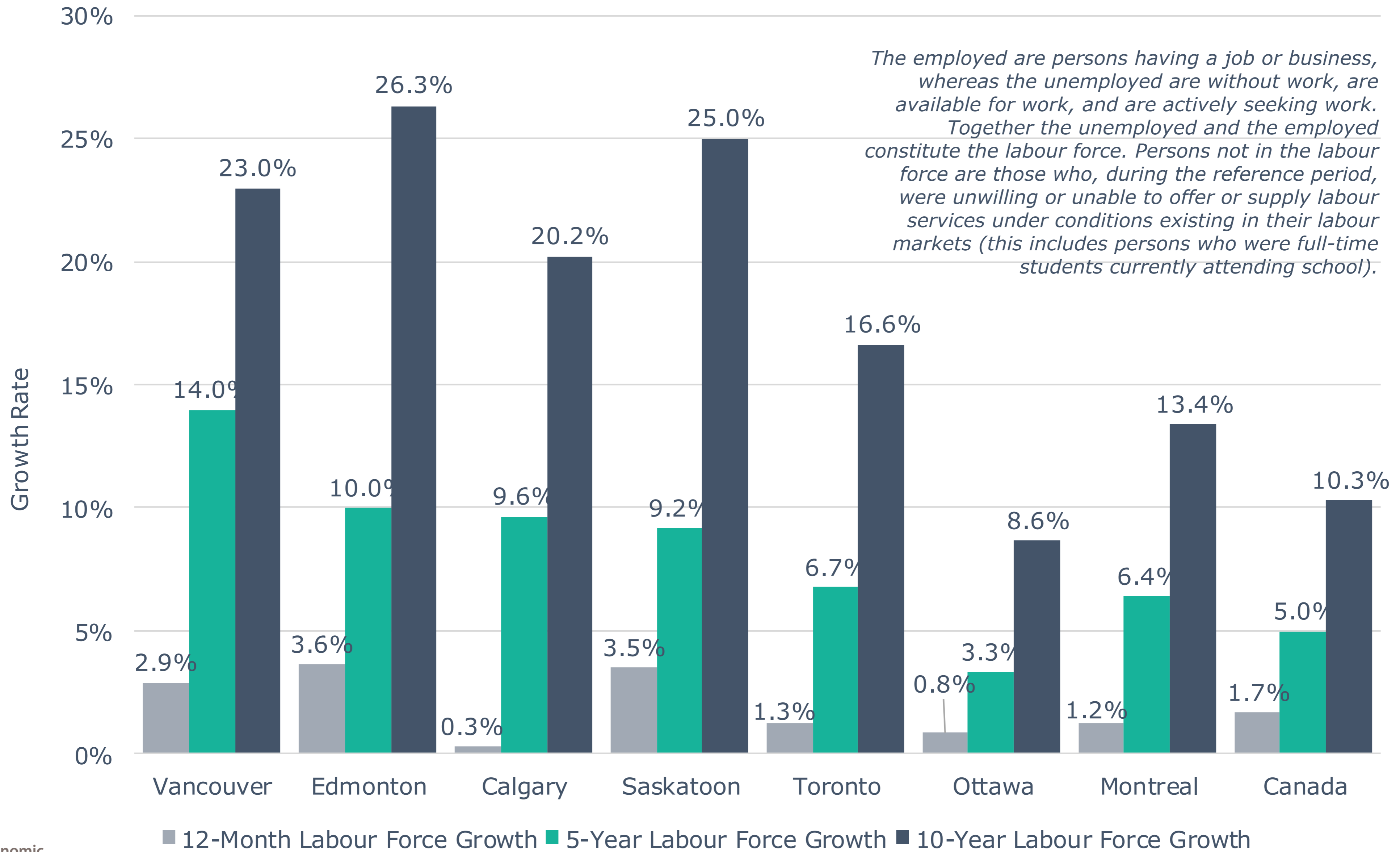
Highest labour force participation rate in Canada



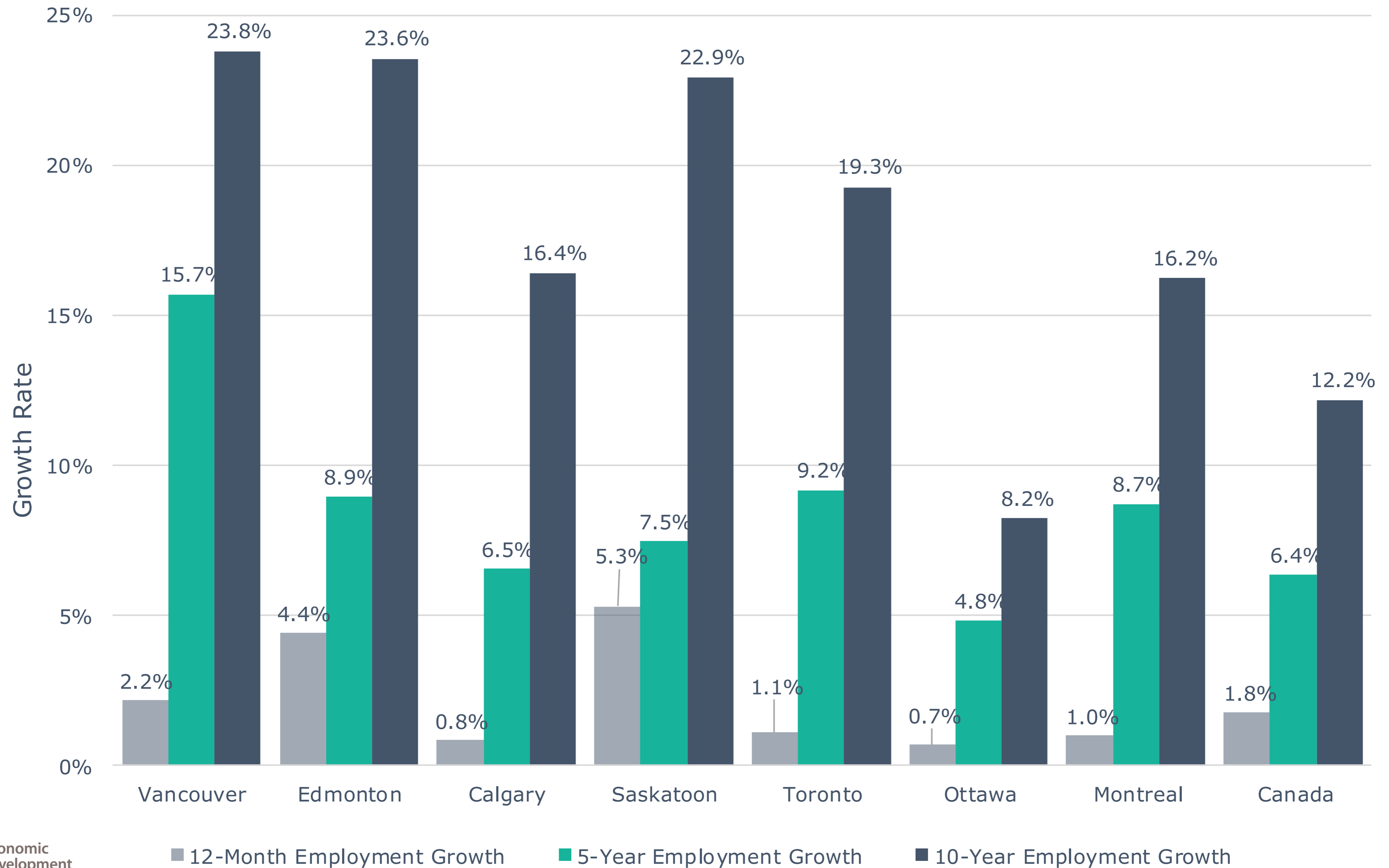
Calgary Labour Force and Employment



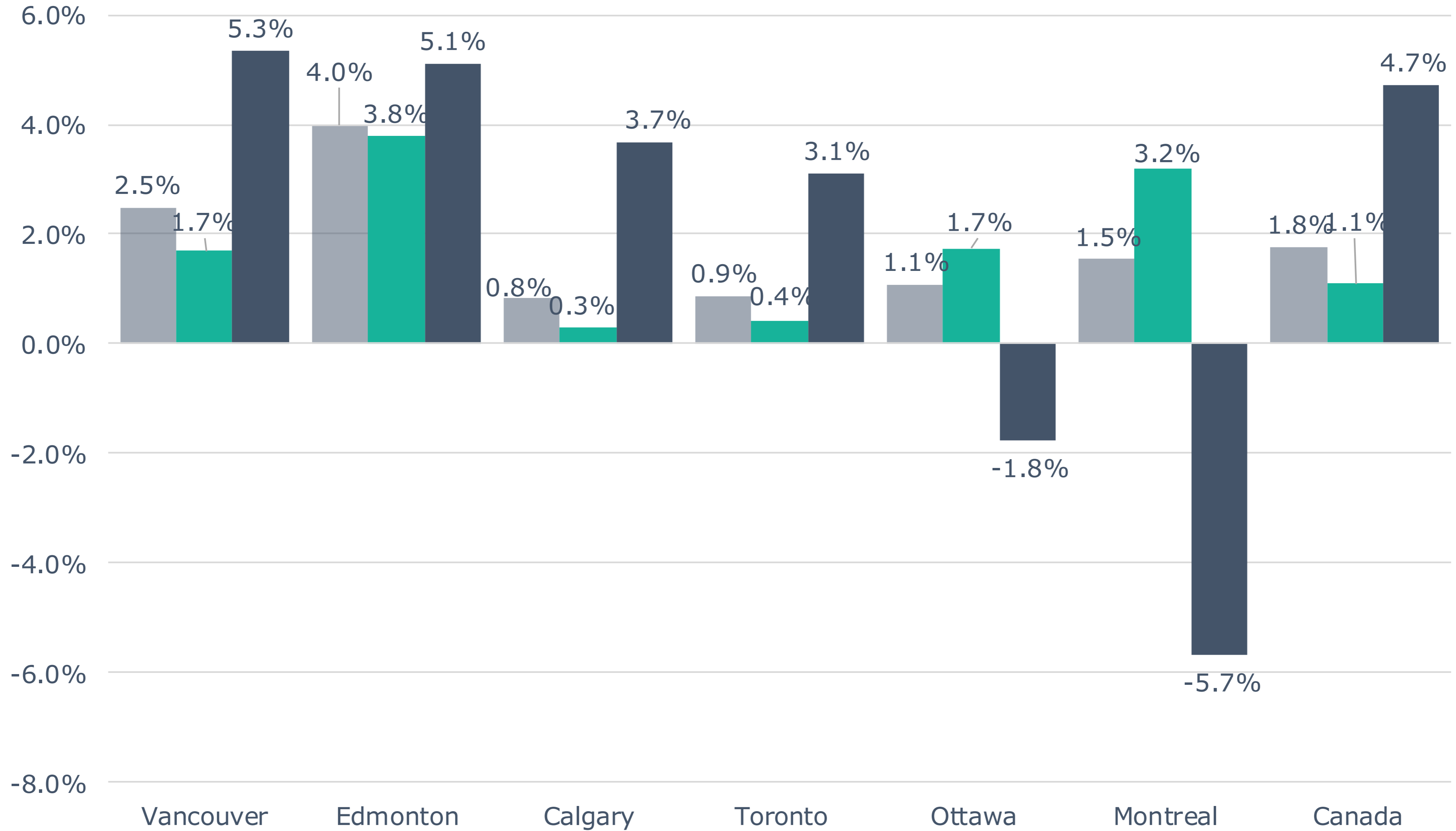
Labour Force Growth Across Canada



Employment Growth Across Canada

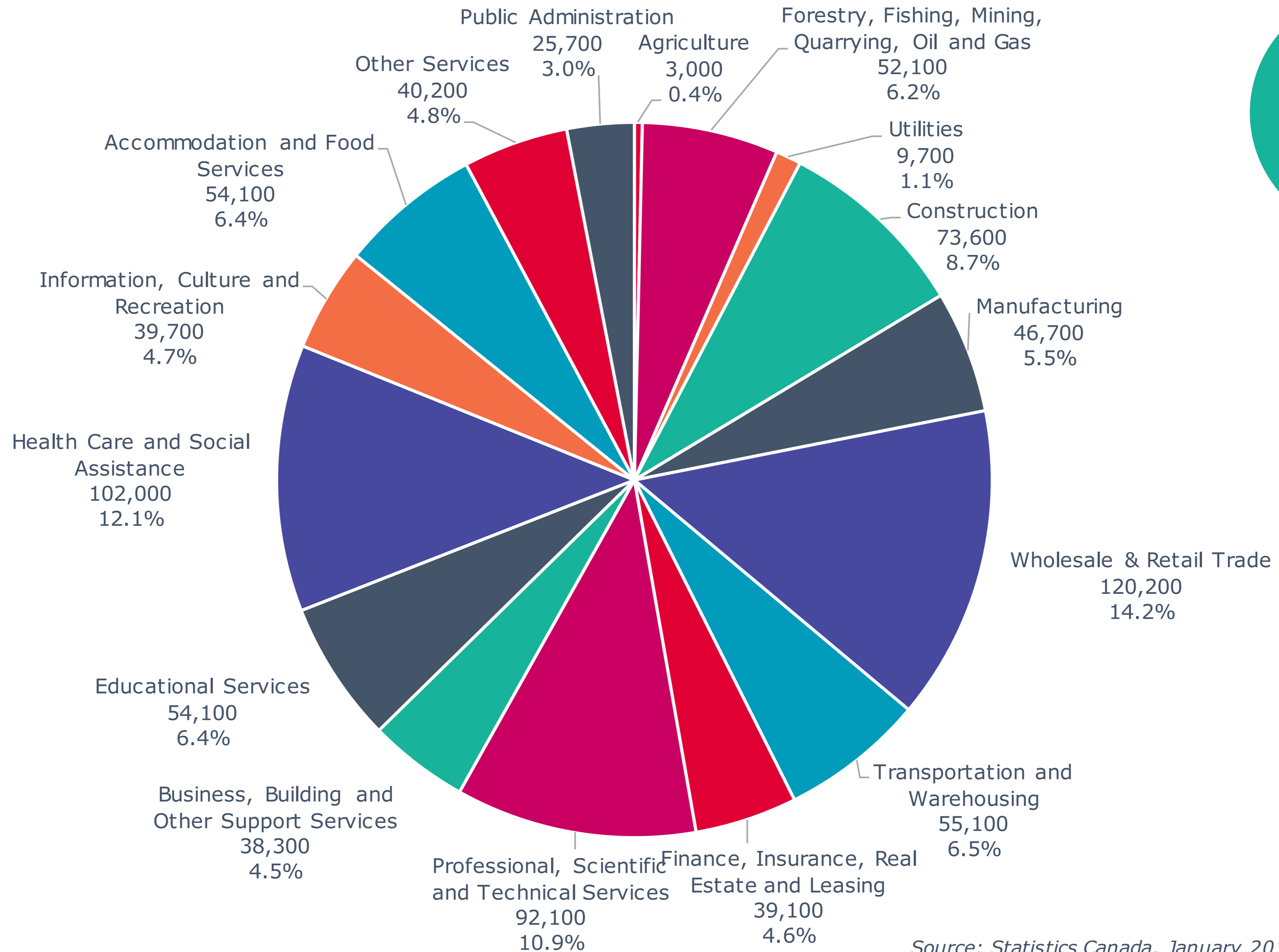


Annual Employment Growth



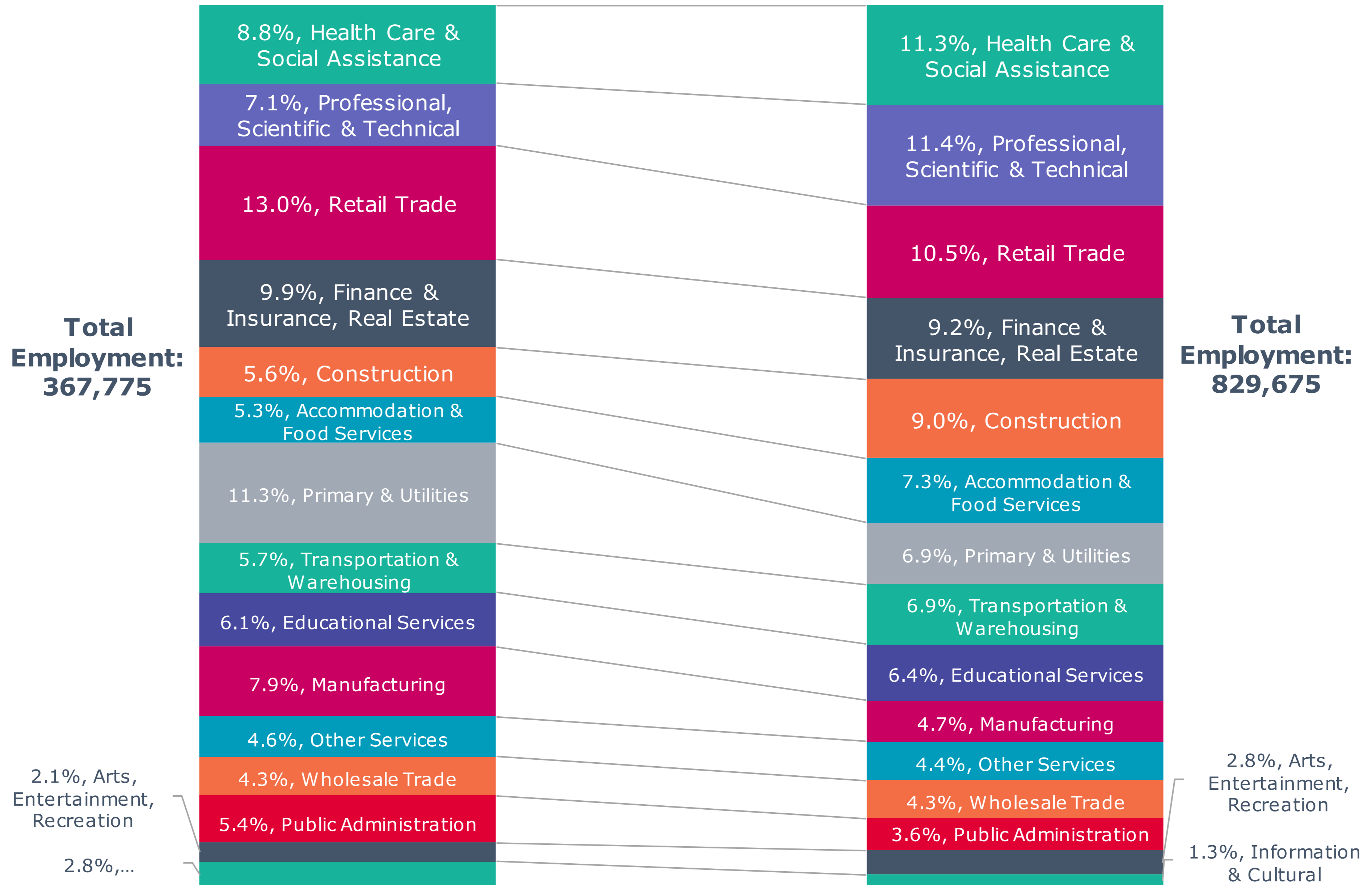
■ Total Employment Growth Rate ■ Full-Time Employment Growth Rate ■ Part-Time Employment Growth Rate

Calgary CMA Employment by Industry (842,000)



Diverse employment

Calgary Historical Employment by Industry



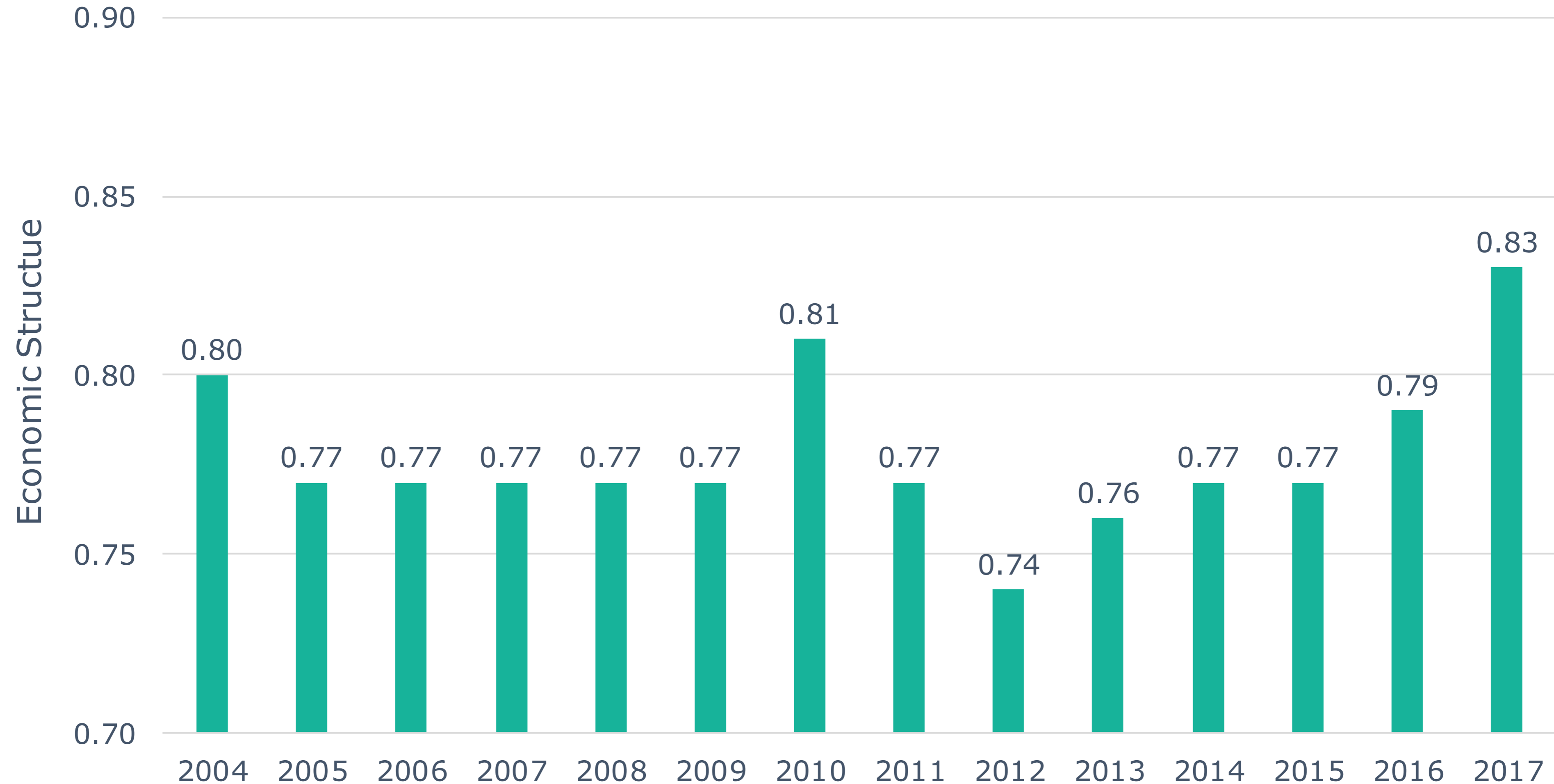
1987

Source: Conference Board of Canada, November 2018

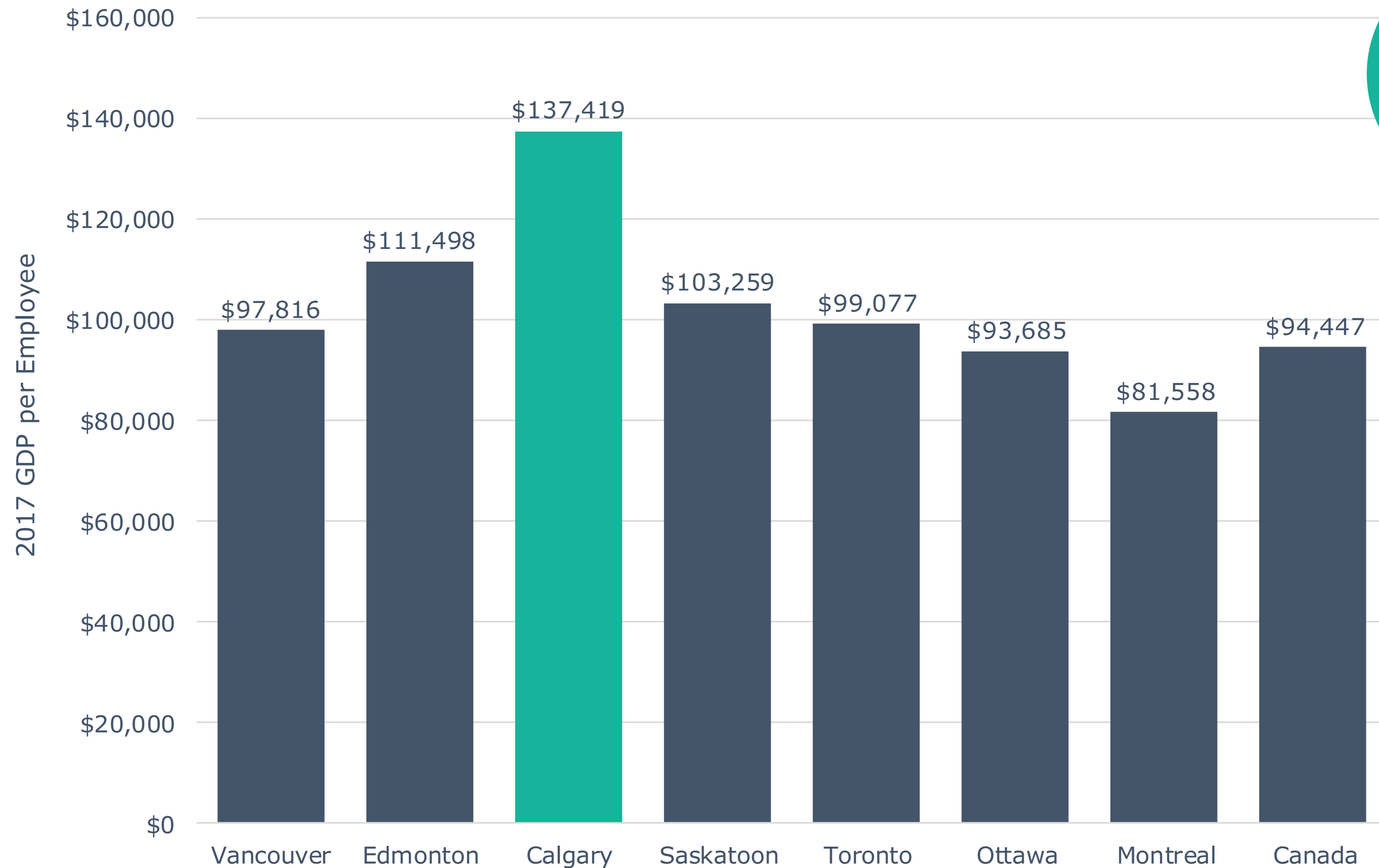
2017

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!**

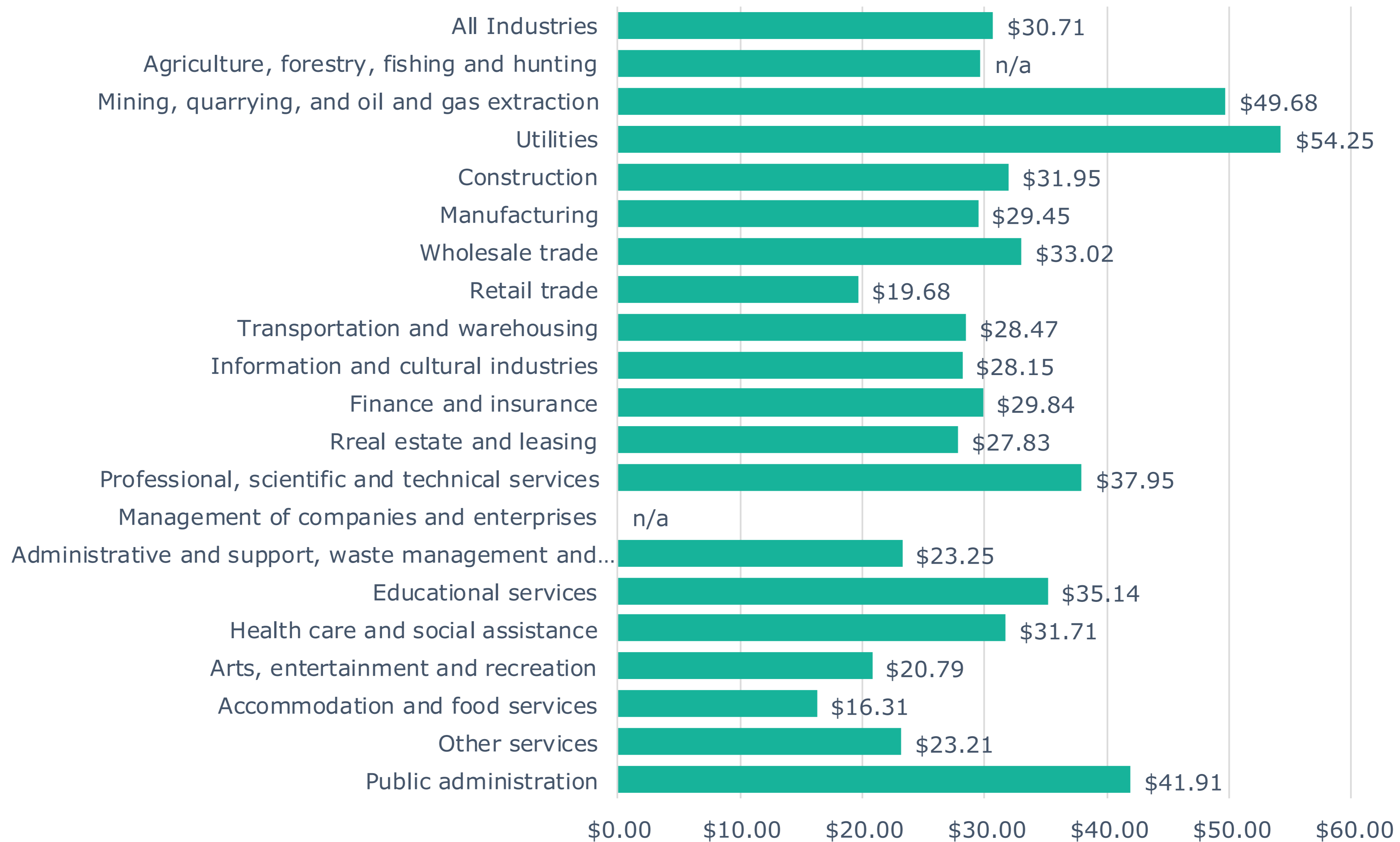


Labour Force Productivity

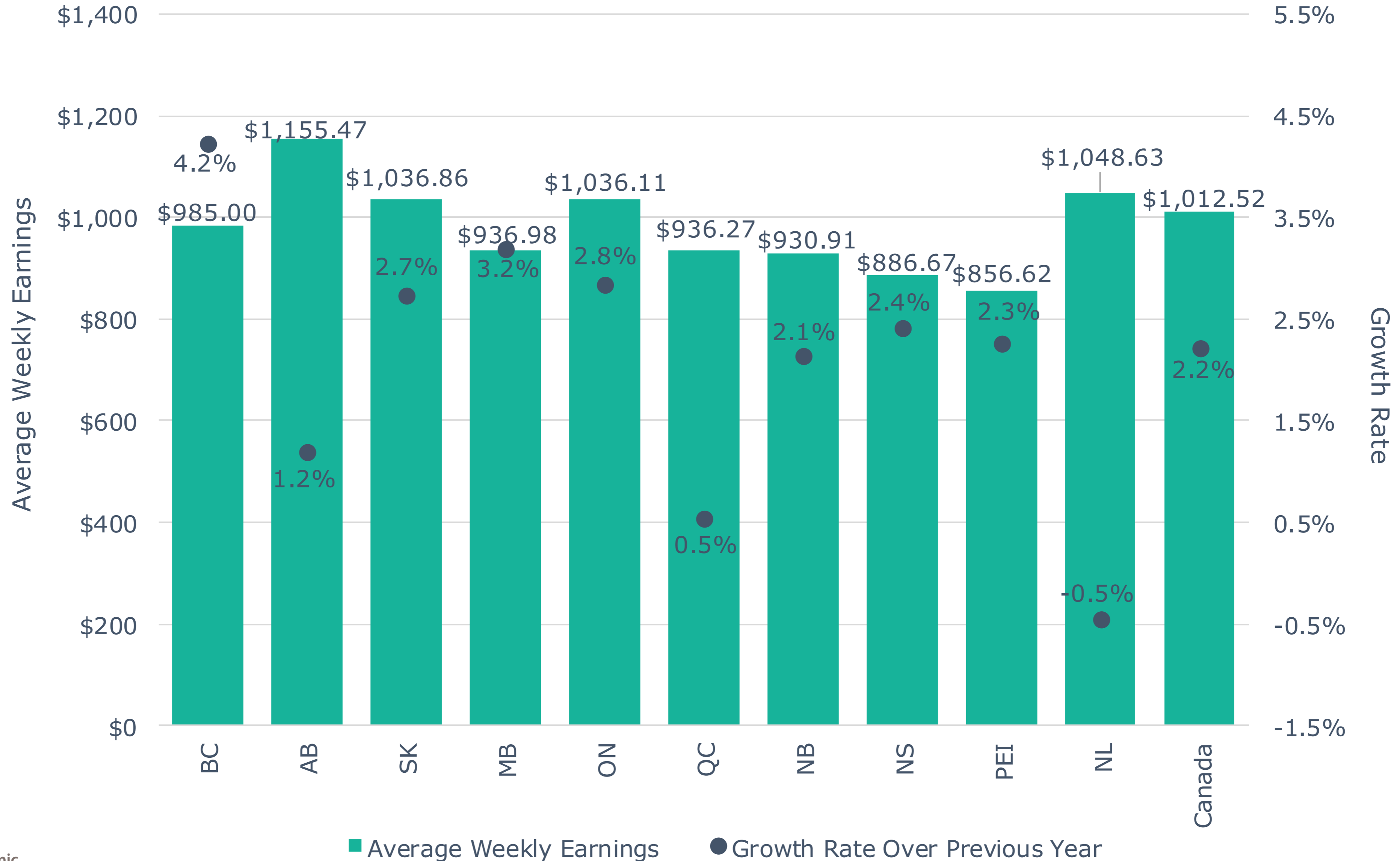


**Most
productive
workforce in
Canada**

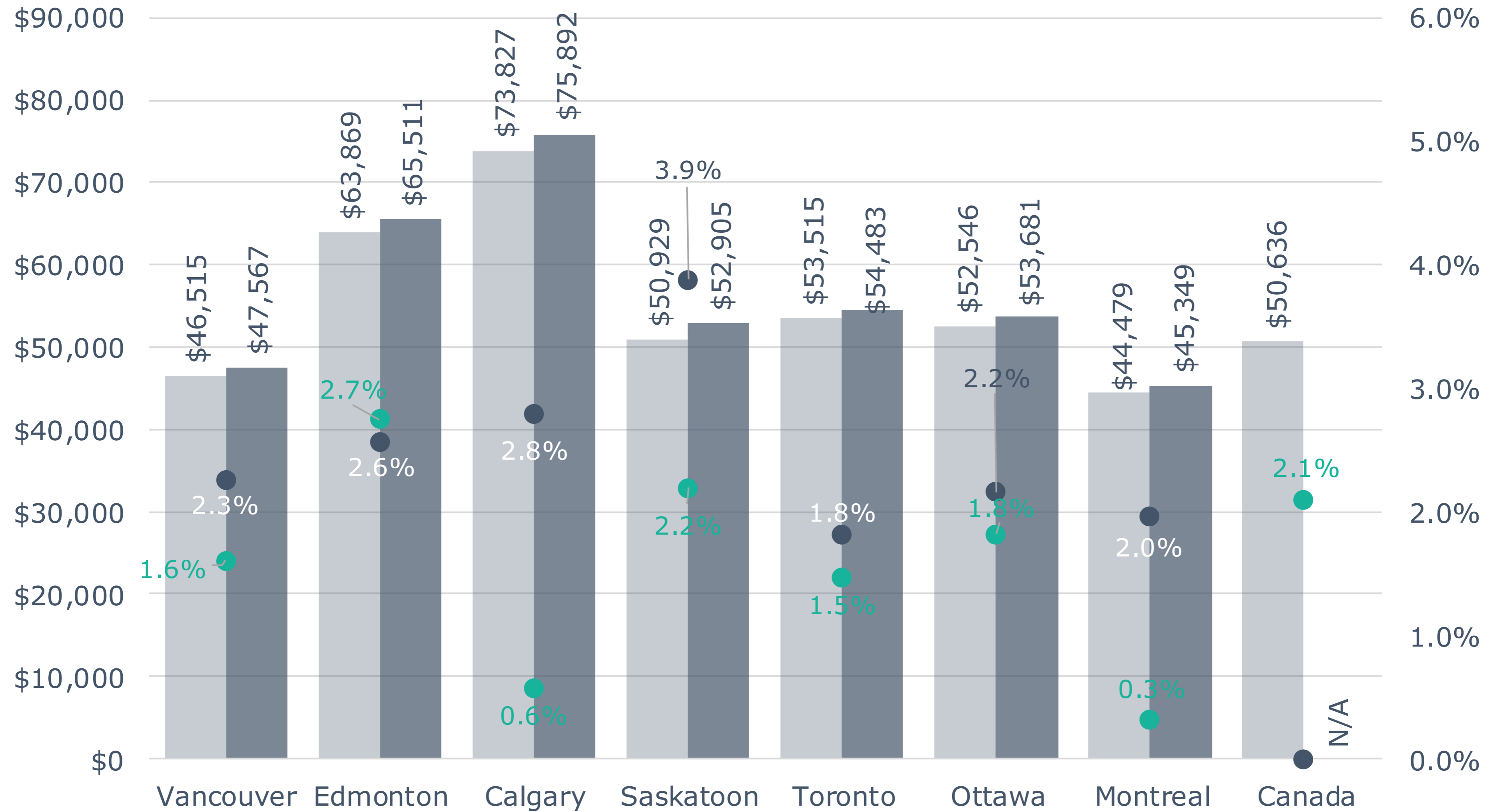
Calgary CMA Average Overall Hourly Wages by Industry



Average Weekly Earnings Across Canada and Growth Rates



Average Wages and Salaries Across Canada



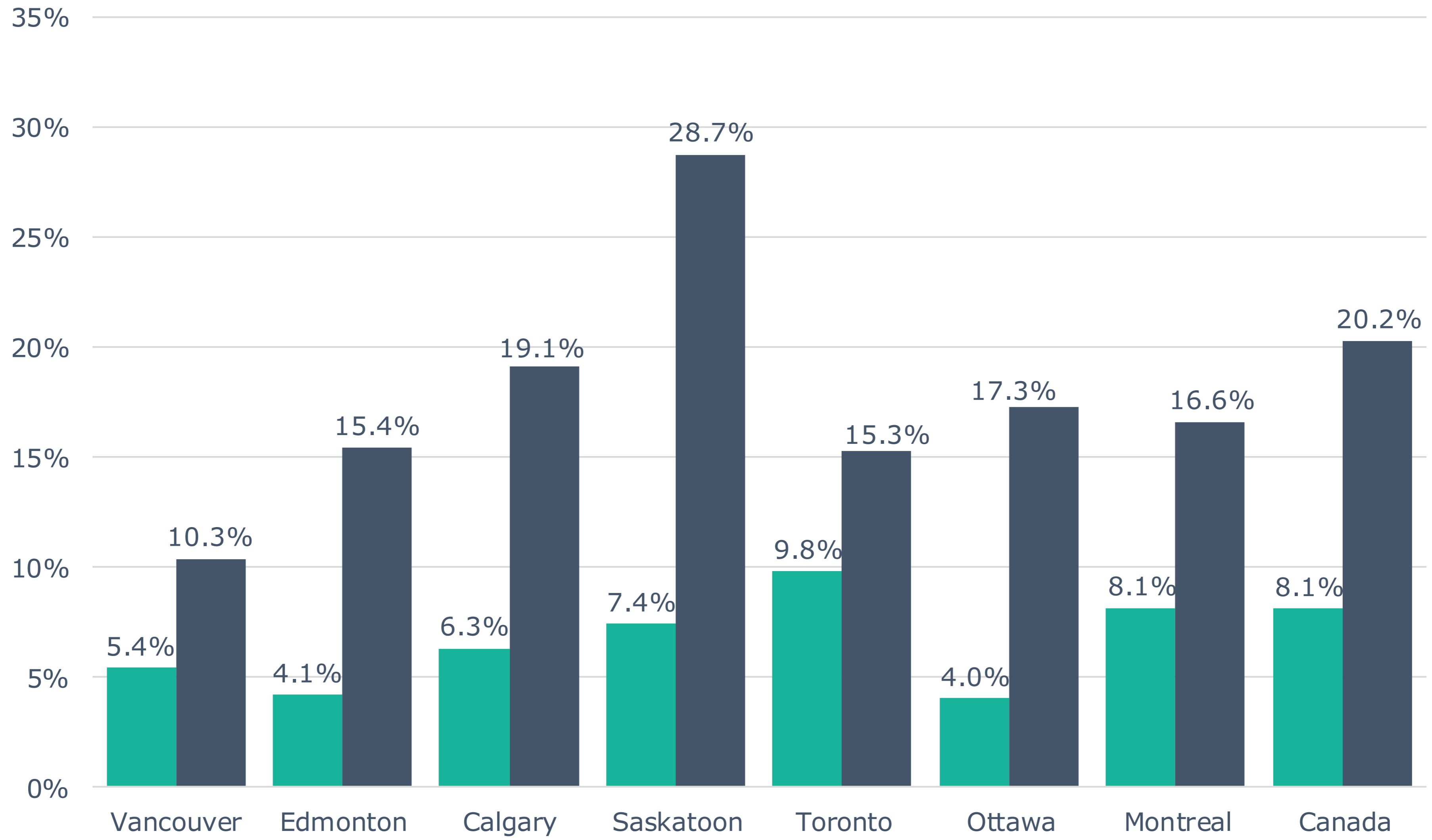
■ 2017F Average Wages and Salaries per Employee

■ 2018F Average Wages and Salaries per Employee

● 2018F Growth Rate

● 2017 Growth Rate

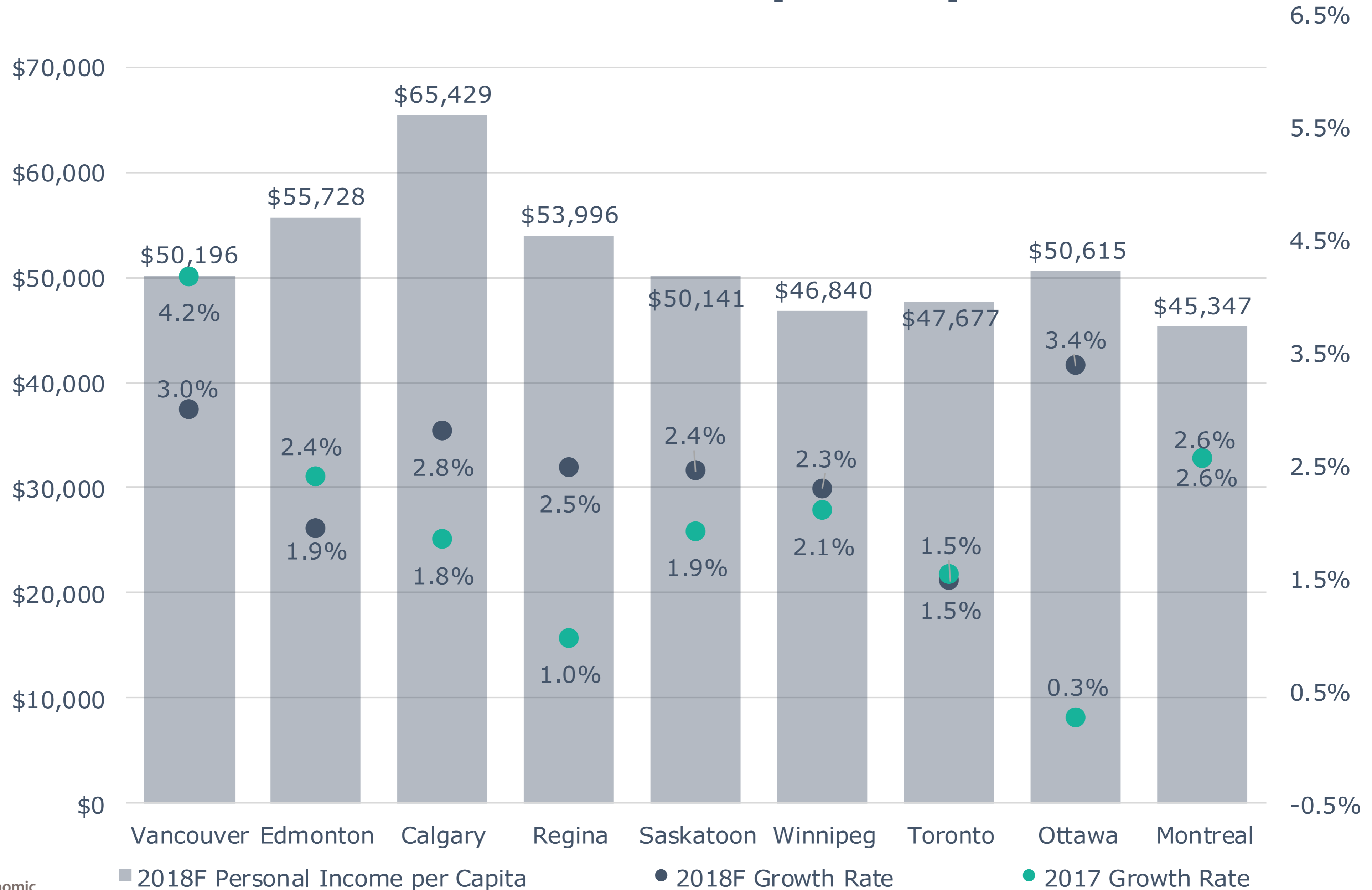
Average Wages and Salaries Growth Rates Across Canada



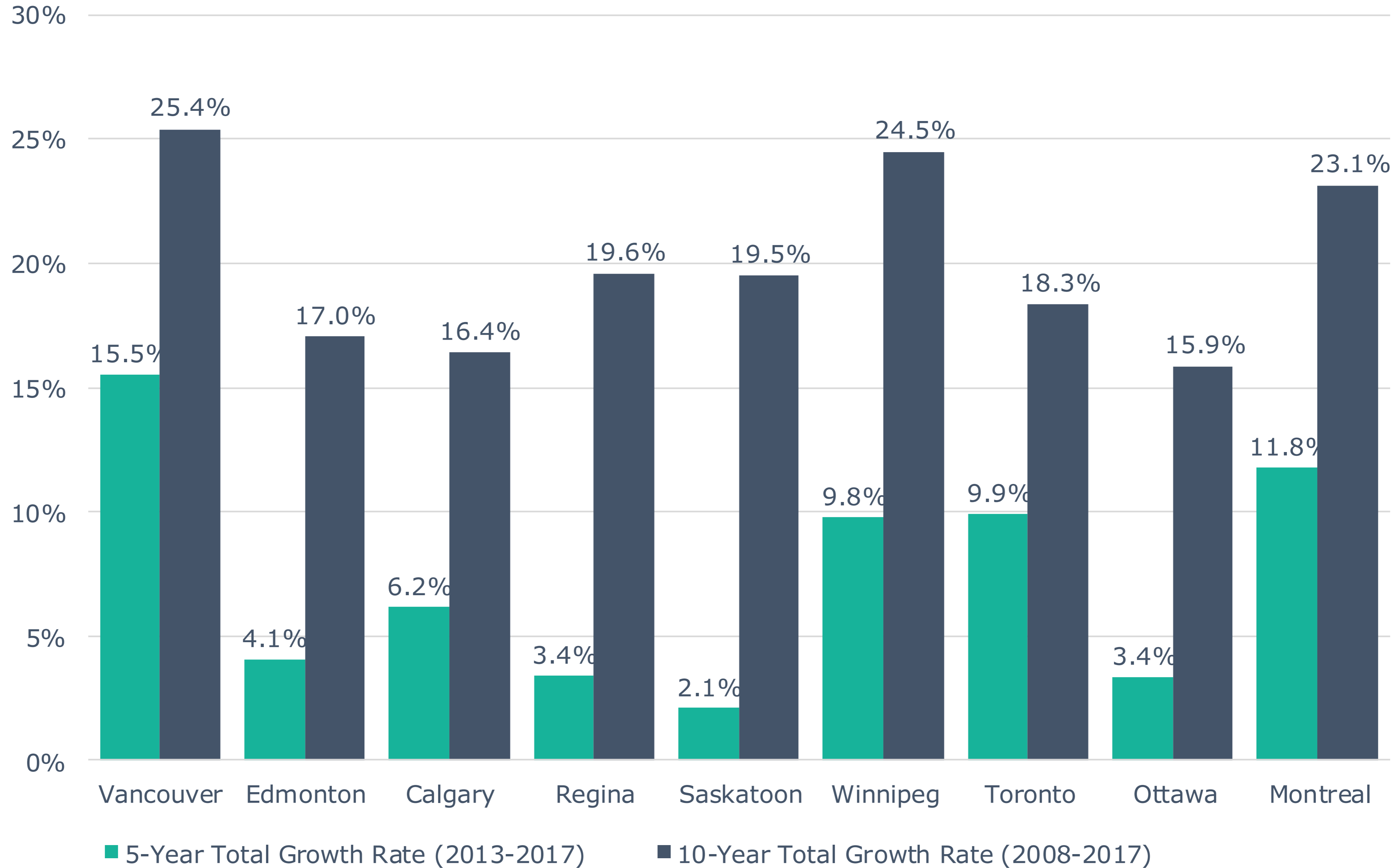
■ 5-Year Total Growth Rate (2013-2017)

■ 10-Year Total Growth Rate (2008-2017)

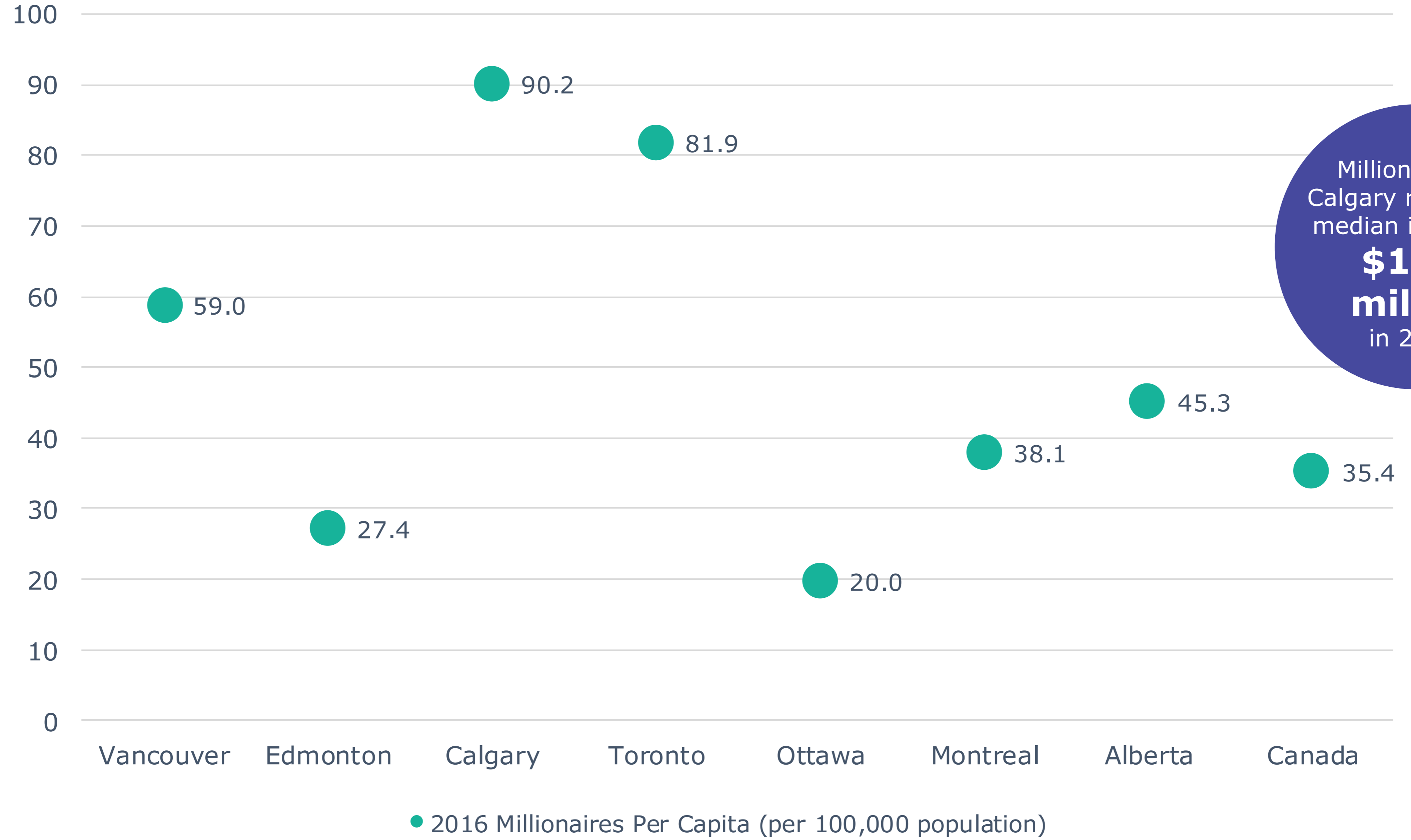
Personal Income per Capita



Personal Income per Capita Historical Growth Rates



Millionaires Per Capita



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

Calgary Companies Hiring Tech



Software Engineer / Developer

January 2019

Glassdoor

Indeed

Absorb Software Inc

ATTAbotics Inc.

Clio

Circle Cardiovascular Imaging

Hatfield Solutions

Cisco

IHS Markit

Garmin

Intercontinental Exchange

Intaver

MobSquad

novatel

Nasdaq

OPUSLOG

Replicon

Serotonin Software Inc.

SkipTheDishes

Synopsys

Trapeze Software

Trulioo

Computer Programmer / Web Developer

January 2019

Glassdoor

Indeed

Convergent IS

Atrema Technologies Inc.

Cadeon Inc.

Field Safe Solutions

Critical Mass

Languages in Motion (LIM)

Decisive Farming

Mobility Quotient Solutions Inc.

Kudos Inc.

Nerder

Modis, Inc.

PARKER PR

Pandell

Pleasant Solutions

Stantec

Skyplan Services Limited

Vog App Developers

Urban Lighthouse

West Works Group Inc.

Vog App Developers

Glassdoor

Indeed