

CALGARY BID
EXPLORATION
COMMITTEE

SUMMARY OF PUBLIC ENGAGEMENT SURVEY

May 2017

**Stone —
Olafson**



NEEDS & PURPOSE

A necessary component of exploring the feasibility of a potential bid for the 2026 Olympic and Paralympic Winter Games is understanding perceptions and levels of support among Calgarians.

The Public Engagement and Community Impact team developed a research model to speak with citizens in Calgary and the surrounding region to understand the potential impacts of bidding and potentially hosting a Games. This research tool was designed to examine economic, social, cultural and environment perspectives. Key questions included:

What is overall awareness of the bid exploration process?

In the context of a potential bid, what are the issues that matter most to citizens?

What are overall levels of support or opposition? How does this vary among different groups?

What are economic, social and environmental perspectives and how do these influence levels of support?

What are concerns surrounding Calgary's reputation and potential legacy?



The story on one page:

Support for a potential bid is fairly high but economic concerns must be addressed

Economy, infrastructure, and debt levels are most prevalent concerns

While these issues are most important to citizens, perceptions of how a bid would impact these issues varies. Citizens feel the local economy, housing and transportation would be positively impacted, but are concerned government debt and finances would take a hit. The environment and social issues like homelessness are also deemed to be potentially negatively impacted, albeit to a lesser degree. **Plans for any potential bid will need to focus on these areas of concern.**

Detailed and transparent information is necessary and desired

A considerable proportion of Calgary region residents remain neutral or skeptical in terms of support because they just don't know enough to provide an opinion. Lack of information is also driving many open-ended concerns. Should Calgary proceed with a bid, information going forward will need to be detailed, in terms of cost, where the money will come from, and what the tangible plans are for infrastructure. **Information efforts should be on-going, timely and transparent.**

Age and tenure of residency divide residents on issues of concern and levels of optimism

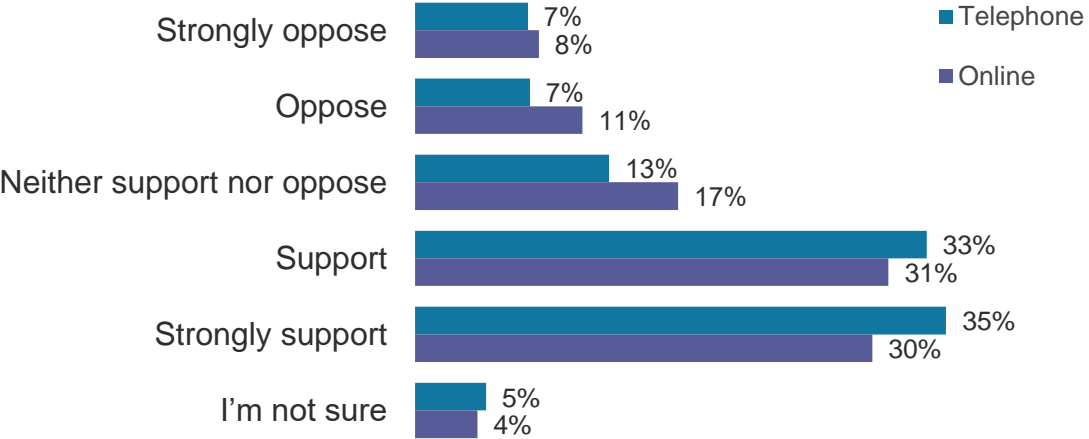
Younger residents and those newer to Calgary are more supportive overall, and generally more positive about specific impacts of a potential bid. Their trust and confidence in the process (and those who may be responsible for a potential bid) is also stronger. While they have greater environmental concerns, there's a sense of hopefulness among these residents. Conversely, older residents tend to be less supportive, more pessimistic and have a strong focus on economic factors. **Future communication will have to address both age cohorts' concerns appropriately.**

Most Calgary area residents would be proud if Calgary was to bid, but desire changes to facilities regardless

A majority of area residents would be proud if Calgary was to bid on the 2026 Games. These emotional connections are important to ongoing support should a bid proceed. There is also a lingering sense of pride in Calgary's legacy from the '88 Games, and with the exception of a minority, residents want the facilities and venues maintained and improved. However, there is also discontent with the repertoire of existing facilities and many feel that Calgary needs more. **Assessing the long-term needs of Calgarians and how potential venues would be best utilized for future use will be important.**

About two-thirds of Calgarians are supportive of a bid for the 2026 Winter Games

A majority of Calgarians support their city bidding on the 2026 Olympic and Paralympic Winter Games. Support is higher among telephone respondents (68%) compared to those surveyed online (60%). While there is opposition to a potential bid from fewer than one-in-five Calgarians, a considerable proportion of Calgarians remain neutral or just don't feel they know enough to provide an opinion.



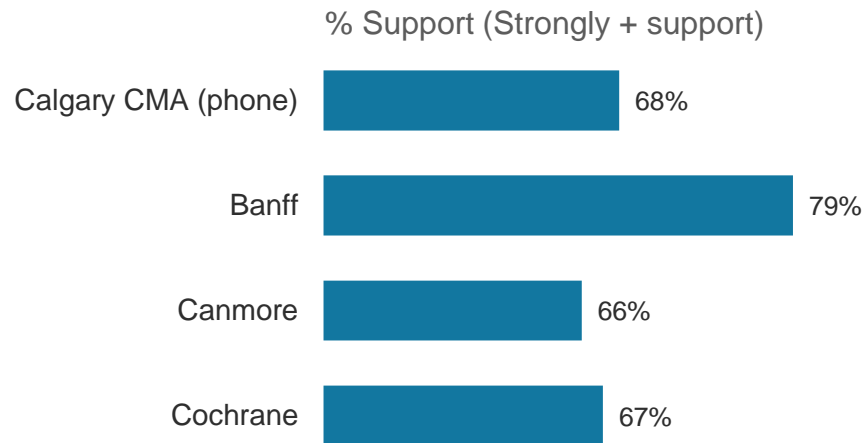
| % Support – Strongly Support/Support | |
|--------------------------------------|-----|
| Total Calgary CMA* | 64% |
| Calgary CMA (telephone) | 68% |
| Calgary CMA (online) | 61% |

**Note: includes telephone and online sample. Interpret with caution.*

Q6. Based on your initial impressions and anything you may have seen, read or heard, to what extent do you oppose or support the Calgary region bidding for the 2026 Olympic and Paralympic Winter Games? Calgary CMA telephone sample; n = 442, Calgary CMA online sample; n = 771

Overall support for a bid is comparable in other communities but highest in Banff

Overall support for the Calgary region bidding for the 2026 Olympic and Paralympic Winter Games is highest in Banff (79%). That said, at least two-thirds of residents in other regions are also supportive.



Q6. Based on your initial impressions and anything you may have seen, read or heard, to what extent do you oppose or support the Calgary region bidding for the 2026 Olympic and Paralympic Winter Games? Calgary CMA telephone sample; n = 452, Banff; n = 201, Canmore; n = 303, Cochrane; n = 222

Support among Calgarians is higher among younger residents, newer residents

Support tends to be higher among those under 55 years of age and those who have lived in the Calgary area for less than twenty years. When it comes to gender, men are both more likely to support and oppose a potential bid than their female counterparts, while women are less decided on the matter.

**Note: includes telephone and online sample.*

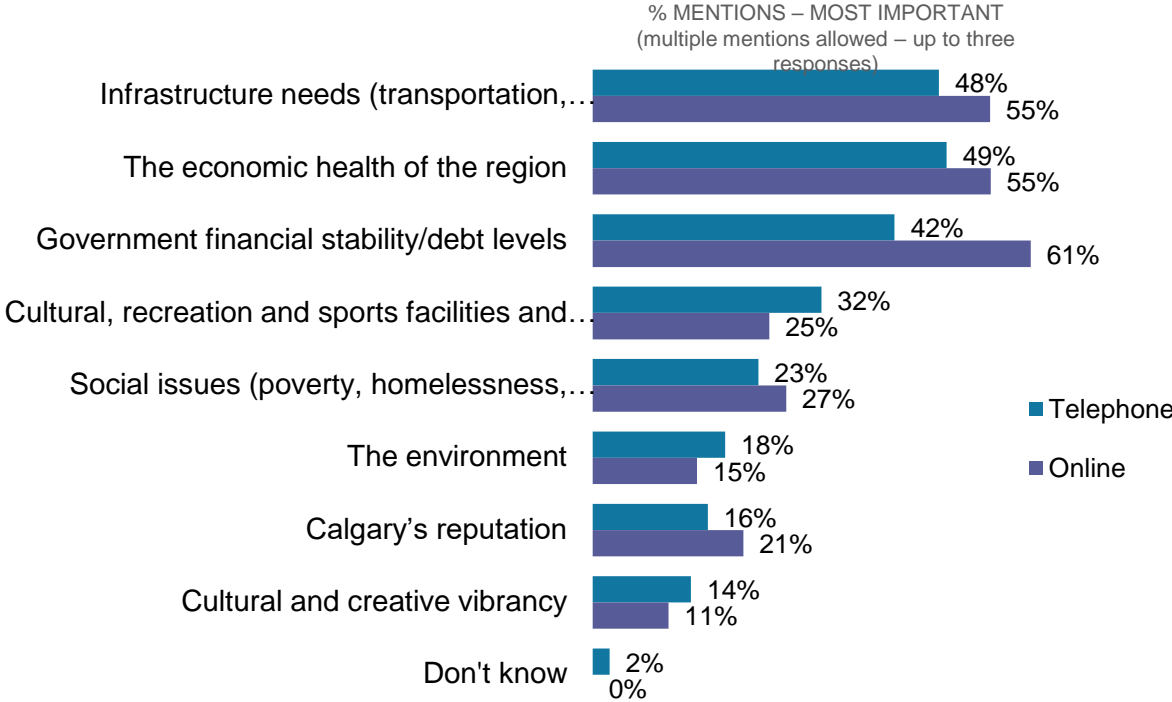
| | GENDER | | AGE | | | | LENGTH OF TIME IN GENERAL CALGARY AREA | | | |
|-----------------------------------|------------|------------|------------|------------|------------|------------|--|------------|------------|------------|
| | Male | Female | 18-24 | 25-34 | 35-54 | 55+ | <5 yrs | 5-9 yrs | 10-19 yrs | 20+ yrs |
| Strongly oppose | 9% | 7% | 2% | 6% | 6% | 15% | 2% | 3% | 7% | 10% |
| Oppose | 12% | 6% | 5% | 8% | 10% | 10% | 6% | 8% | 7% | 11% |
| Neither support nor oppose | 12% | 18% | 15% | 13% | 14% | 18% | 19% | 12% | 16% | 14% |
| Support | 31% | 33% | 43% | 31% | 31% | 29% | 36% | 38% | 30% | 31% |
| Strongly support | 34% | 31% | 29% | 36% | 37% | 23% | 33% | 34% | 36% | 30% |
| I'm not sure | 3% | 6% | 7% | 6% | 2% | 5% | 3% | 4% | 4% | 5% |
| [NET] OPPOSE | 20% | 13% | 7% | 14% | 15% | 25% | 8% | 12% | 14% | 20% |
| [NET] SUPPORT | 65% | 64% | 72% | 67% | 68% | 52% | 70% | 72% | 66% | 61% |
| n= | 595 | 628 | 120 | 225 | 502 | 376 | 112 | 128 | 261 | 720 |

Q6. Based on your initial impressions and anything you may have seen, read or heard, to what extent do you oppose or support the Calgary region bidding for the 2026 Olympic and Paralympic Winter Games? Total Calgary CMA sample; n = 1223*

Calgarians are most concerned about infrastructure needs, economic health and government finances/debt levels.

When it comes to issues affecting Calgarians, and how these weigh-in when considering a potential bid, Calgarians are most concerned about infrastructure needs such as transportation and housing. Approximately one half of Calgarians also mention economic issues as their top priority, followed by government financial stability and debt levels. Other issues are relatively less important and are selected by fewer than a third of Calgary residents.

Those who participated in the survey online are even more likely than telephone respondents to place priority on infrastructure, the economy and government finances.



For the most part, Calgarians are consistent on what the top priorities are across demographics

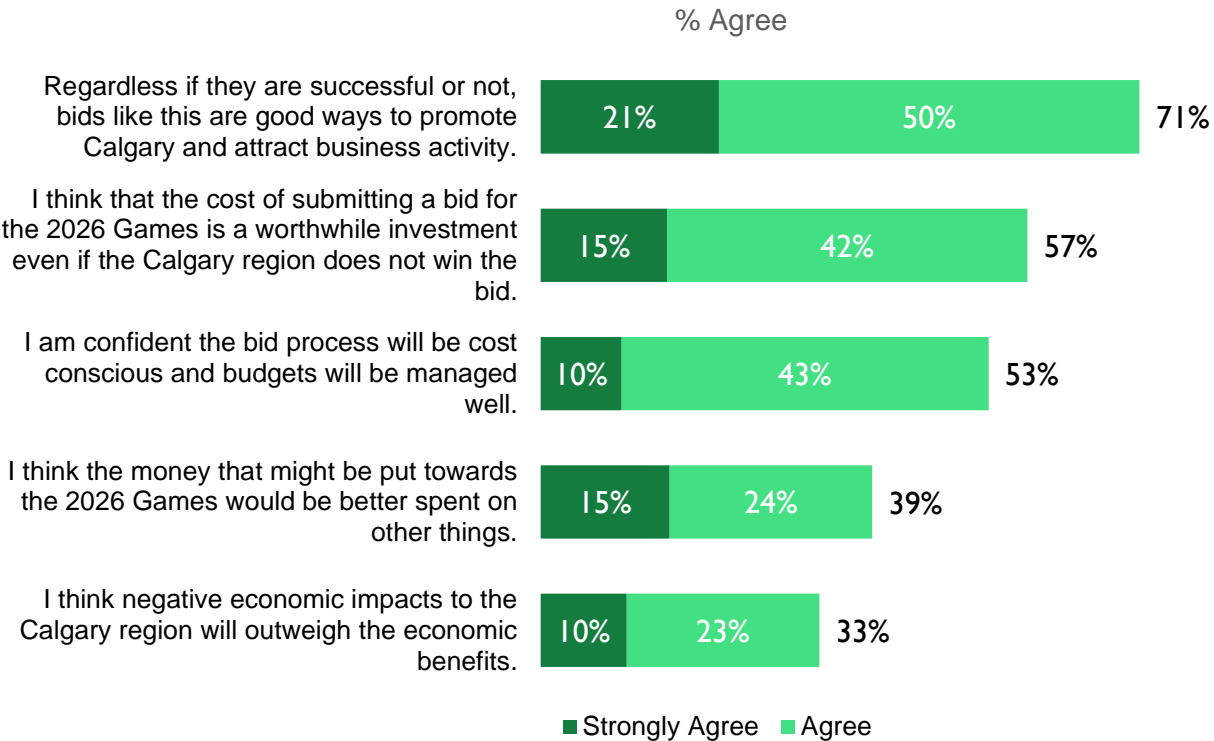
Men, long-term Calgary residents, and those aged 55+ are more likely to place priority on infrastructure needs. Younger Calgarians (18-24 years) and those who are relatively new to the area (less than 5 years) are the most likely to consider environmental issues, while those aged 25-34 years place higher priority on Calgary’s reputation.

**Note: includes telephone and online sample.*

| | GENDER | | AGE | | | | LENGTH OF TIME IN GENERAL CGY AREA | | | |
|--|------------|------------|------------|------------|------------|------------|------------------------------------|------------|------------|------------|
| | Male | Female | 18-24 | 25-34 | 35-54 | 55+ | <5 yrs | 5-9 yrs | 10-19 yrs | 20+ yrs |
| Infrastructure needs (transportation, housing, etc.) | 56% | 48% | 50% | 49% | 53% | 53% | 47% | 45% | 47% | 56% |
| The economic health of the region | 53% | 52% | 44% | 53% | 55% | 52% | 51% | 52% | 53% | 52% |
| Government financial stability/debt levels | 51% | 53% | 43% | 47% | 52% | 59% | 50% | 39% | 48% | 56% |
| Cultural, recreation and sports facilities and programs | 31% | 25% | 32% | 23% | 30% | 27% | 23% | 29% | 29% | 29% |
| Social issues (poverty, homelessness, crime, etc.) | 21% | 29% | 27% | 29% | 22% | 26% | 29% | 28% | 20% | 26% |
| The environment | 13% | 20% | 29% | 18% | 12% | 16% | 24% | 16% | 15% | 16% |
| Calgary’s reputation | 20% | 17% | 14% | 26% | 17% | 18% | 22% | 17% | 19% | 18% |
| Cultural and creative vibrancy | 11% | 13% | 13% | 17% | 12% | 8% | 17% | 20% | 13% | 10% |
| Don’t know | 1% | 1% | 0% | 1% | 1% | 2% | 4% | 0% | 0% | 1% |
| n= | 595 | 628 | 120 | 225 | 502 | 376 | 112 | 128 | 261 | 720 |

Q7. Many issues and considerations are important to people living in the Calgary region. When it comes to the possibility of bidding for or hosting the 2026 Games, which of the following are most important to you? Total Calgary CMA sample; n = 1223*

While economic concerns are high priority for Calgarians, many see the positives a bid could have for their city

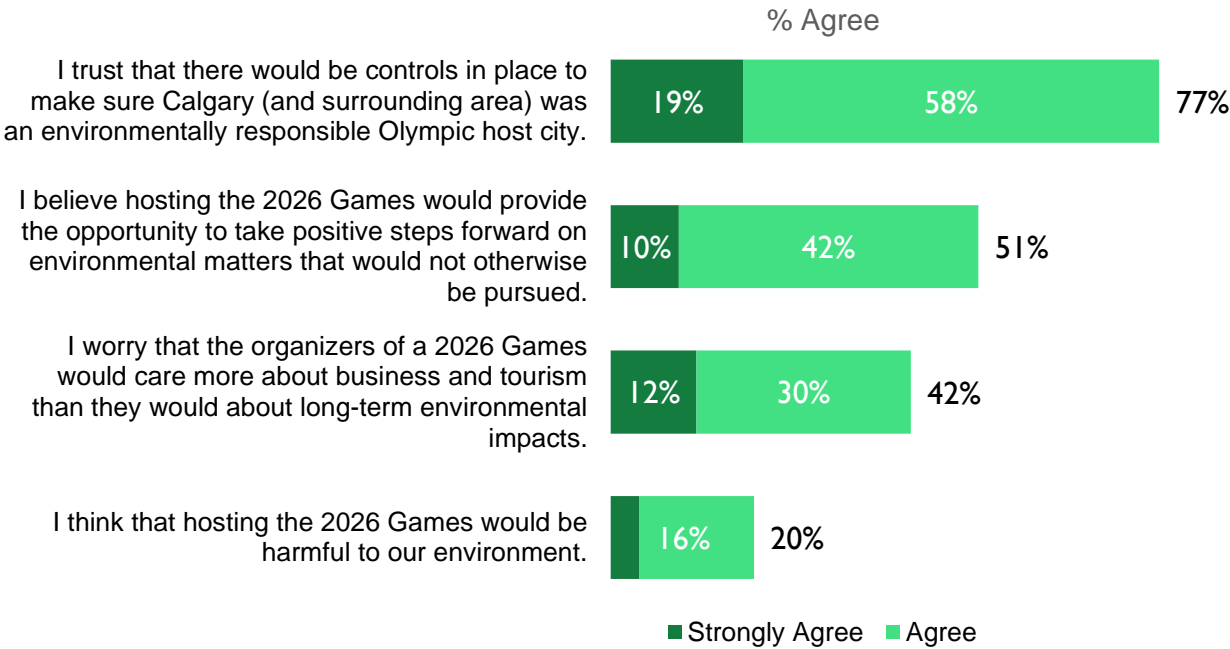


A sizeable majority of Calgarians see economic value and worthwhile investment in a potential bid, regardless if they are successful. However, Calgarians are more divided when it comes to confidence in the bid process to be cost conscious and manage budgets well.

Additionally, Calgarians are less likely to agree that negative economic impacts will outweigh potential economic benefits or that the money that might be put towards the 2026 Games would be better spent on other things.

**Note: includes telephone and online sample.*

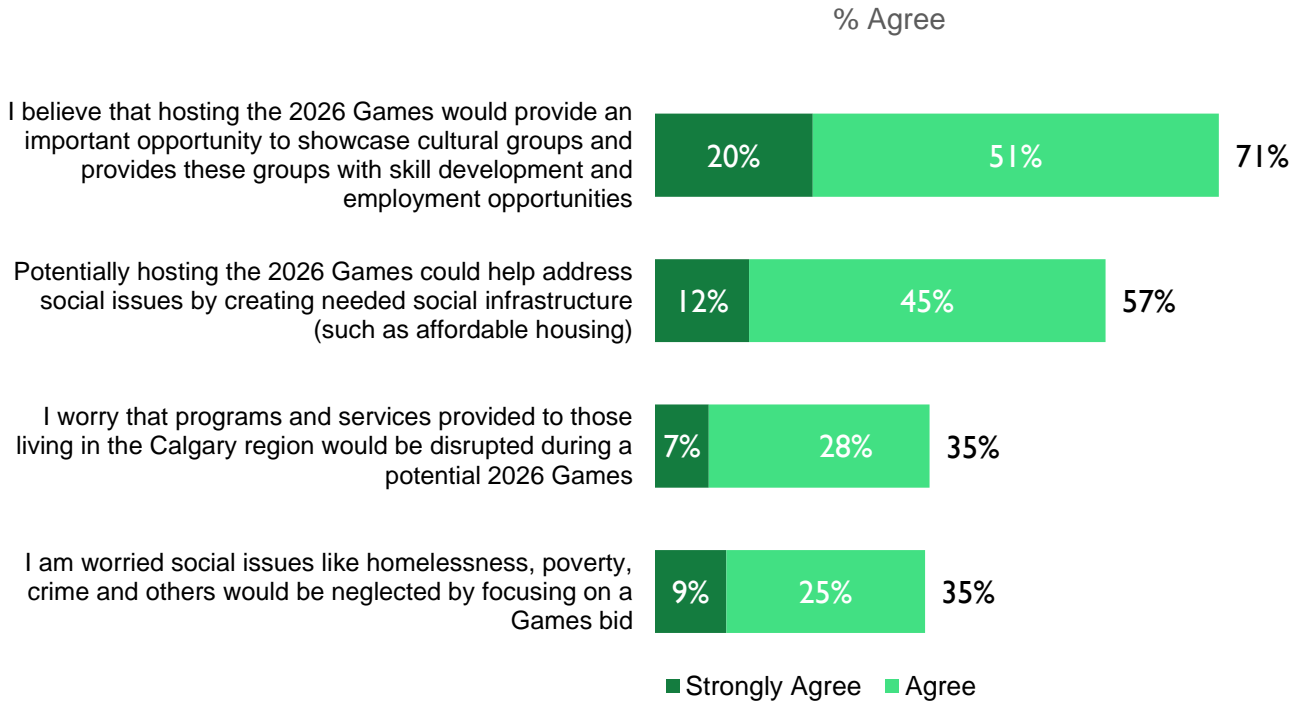
Calgarians, by and large, trust the city would be an environmentally responsible host and don't feel the Games would be harmful, but are less convinced the undertaking would provide progressive steps forward.



While Calgarians are generally optimistic about the environmental impact the 2026 Olympic Games would have on their city, there are concerns that it is a secondary consideration.

**Note: includes telephone and online sample.*

Calgarians are positive about the opportunity to showcase cultural groups though some worry about potential negative impacts on social issues.

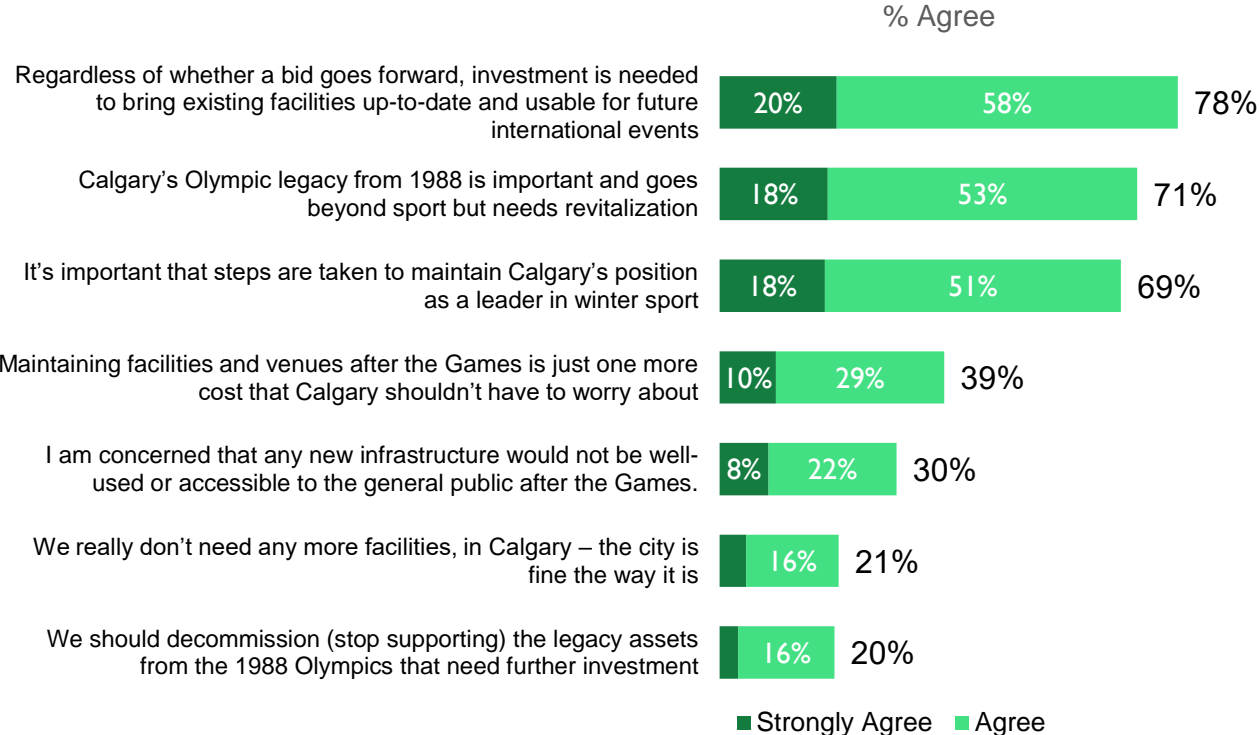


A solid majority of Calgarians agree that hosting the 2026 Games would provide important opportunities for cultural groups in their city. However, optimism is softer when it comes to whether a Games could potentially help address social issues.

Just over a third of Calgarians worry about a disruption of programs and services during a potential Games and whether social issues might be neglected.

**Note: includes telephone and online sample.*

Calgarians see value in maintaining Calgary’s legacy from ’88 but also desire further investment in both new and existing facilities

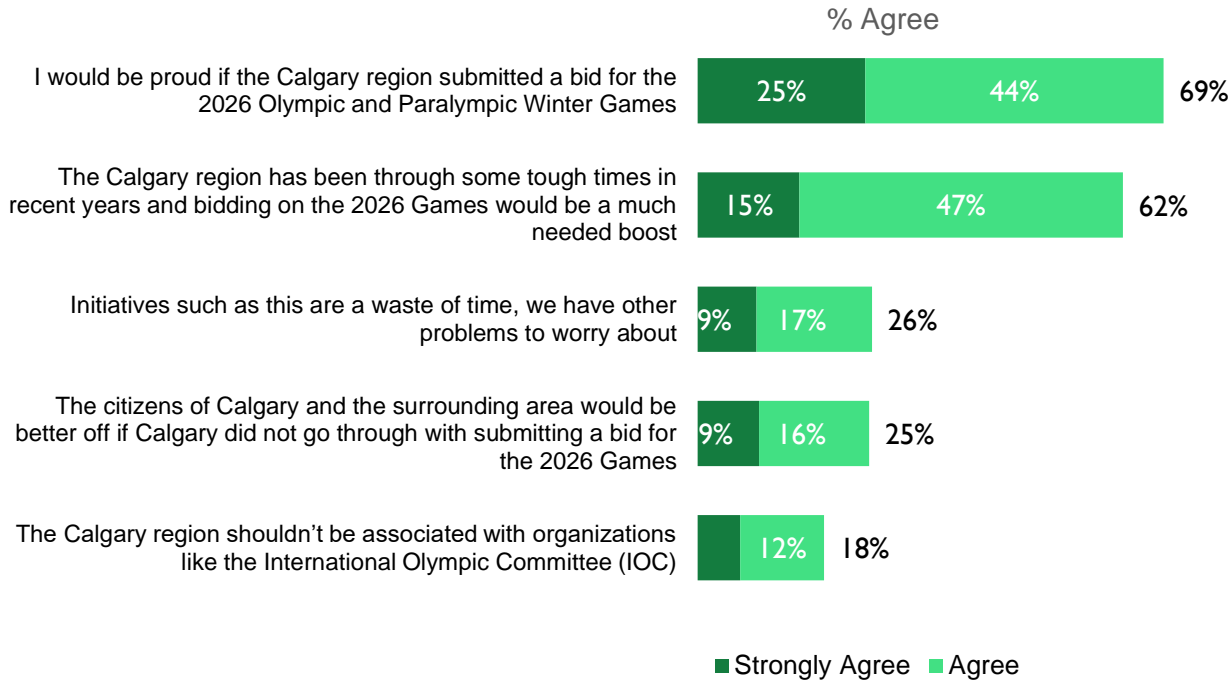


More than seven in ten Calgarians would like to see further investment in existing legacy facilities and agree that the past legacy goes beyond sport - but needs revitalization.

While sizeable minorities are concerned about the cost and utilization of post-Games infrastructure, the predominant sentiment is that Calgary is in need of updated facilities.

**Note: includes telephone and online sample.*

General attitudes toward bidding on the 2026 Games are positive. A majority of Calgarians would have pride in a bid, view the bid as a good use of time and see a bid as a much needed boost for their city. Few have issues with Calgary being associated with the IOC.

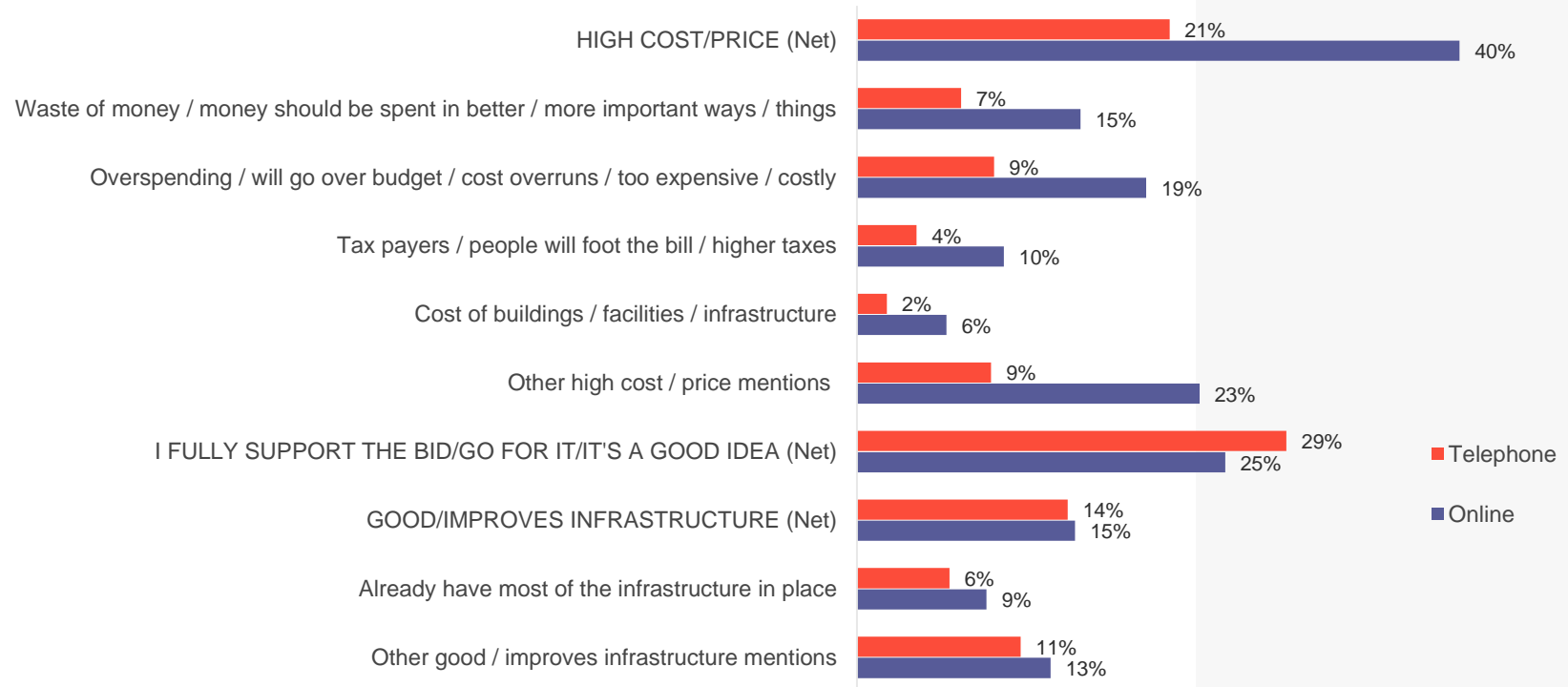


More than two-thirds of Calgarians would be proud if their city submitted a bid. A majority also agree that the bid itself would be a much needed boost after some tough times and that these types of initiatives are not a waste of time. Fewer than one-in-four residents feel a bid would be negative for the citizens of Calgary and that the region shouldn't associated itself with organizations like the IOC.

**Note: includes telephone and online sample.*

Cost is the main focus of negative perceptions regarding a potential bid. Positive associations centre on improved infrastructure and general positive sentiments for the region

OPEN ENDED RESPONSES: % MENTIONS
(multiple mentions allowed)



Q14. Do you have any other questions or comments about the possibility of Calgary submitting a bid for the 2026 Olympic and Paralympic Winter Games? Calgary CMA telephone sample; n = 175, Calgary CMA online sample; n = 217

Secondary considerations range from legacy-related comments to community support and the environment, but there is clearly a desire for detailed/transparent information should Calgary decide to proceed

