



The City of Calgary Communications Study November 2011

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We are proud to present you with this research report, which was produced under the stringent quality standards of our company and those of the Marketing Research and Intelligence Association (MRIA). We are confident that this report will address your concerns and we hope to have the privilege of serving you again in the near future.

A handwritten signature in blue ink that reads "Jean-Marc Léger". The signature is written in a cursive, flowing style.

Jean-Marc Léger
President

**The largest
Canadian-owned
marketing research
and polling firm**

CONTEXT AND OBJECTIVES





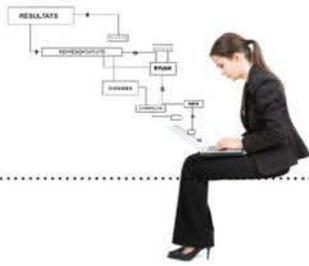
CONTEXT AND OBJECTIVES



- Leger Marketing Alberta was contracted by The City of Calgary to conduct an online survey to gather information from Calgary residents regarding Report to Calgarians TV segments and the 2011 City of Calgary corporate wall calendar which is distributed to nearly 400,000 households in Calgary.
- The information is needed to gauge the interest and support citizens have in regards to the TV segments and the corporate calendar.
- Similar studies were conducted in August 2010 and February 2011. In August 2010 interest and support was measured for both the Report to Calgarians TV segments and the corporate calendar, whereas in February 2011 the study was smaller and concentrated solely on the corporate calendar.



RESEARCH METHODS



METHODOLOGY

Data Collection

- 754 online interviews with Calgarians using Leger Marketing's online panel.
- Interviews conducted between October 24th and 30th, 2011.

Target Respondents

- Residents of Calgary, aged 18 years or older.

Statistical Reliability

- As a non random Internet survey, a margin of error is not reported (margin of error accounts for sampling error). Had this data been collected using a probability sample, the margin of error would be ± 3.6 percentage points, 19 times out of 20.

Note: Where applicable, comparisons are made with the previous waves of research. Any changes in the format/questionnaire have been noted appropriately.



KEY INSIGHTS



KEY INSIGHTS



Report to Calgarians

Overall, communication efforts regarding “Report to Calgarians” has been effective and TV remains the primary source of awareness.

Awareness & Recall

- TV continues to be the primary source of awareness of advertising or public service announcements about The City of Calgary.
 - There is significant overlap between awareness through TV and radio.
 - Among specific channels, Global Television is the most effective.
- Aided awareness of the “Report to Calgarians” has increased since August 2010.
 - Without being prompted, Calgarians who are aware of the reports are able to recall the recently aired “Report to Calgarians” segments.

Impact

- Impact of the “Report to Calgarians” largely reflect the recent reports recalled -The various “Reports to Calgarians” have positively influenced the recycling and composting habits of Calgarians in 2011
 - The net proportion reporting any influence is similar to 2010.

City Of Calgary Corporate Wall Calendar

- Incidence of keeping the corporate calendar among Calgarians has decreased since February 2011 (albeit still higher than August 2010).
- Keeping track of dates and events/appointments and checking the day of the week continue to be the primary uses of the calendar. Usefulness in terms of “City Events” has increased over time.

2005	25%
2006	35%
2007	36%
2008	48%
2009	55%
2010	80%
2011	85%

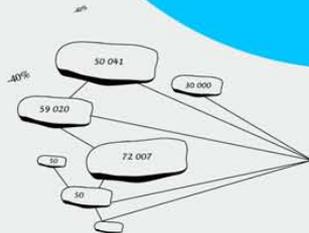


+10%

+10%

+40%

DETAILED ANALYSIS OF RESULTS





RECALL AND
IMPACT OF
“REPORT TO
CALGARIANS”



CITY OF CALGARY MESSAGING AWARENESS



Have seen or heard any advertising or public service announcements about The City of Calgary in past six months

Calgarians	August 2010* (n=762)	October 2011 (n=754)
Recall Any	49%	56%
Recall on TV	49%	47%
Television – can't remember which station	-	23%
Global television station	-	21%
Digital screens at City of Calgary facilities	-	6%
HUTV (Health Unlimited Television) – played on TVs in hospital patient rooms, waiting rooms, medical clinics and labs	-	3%
OMNI television station	-	2%
Recall on Radio	-	21%

More than half of Calgarians recall having seen or heard advertising or public service announcements about The City of Calgary in the past six months, primarily on television. Awareness is similar to August 2010.

Note: The study in August 2010 asked only about television advertisements and public service announcements.

Unaided awareness of The City of Calgary messaging increases with age with older Calgarians (aged 55 or older) more aware than younger Calgarians (18-34 years of age).



UNAIDED MESSAGE RECALL

<i>Calgarians who are aware of City of Calgary messaging</i>	<i>(n=380)</i>
Environmental/Recycling	30%
<i>Recycling/Compost waste</i>	19%
<i>Blue and black bins</i>	9%
<i>Green bins/boxes</i>	3%
City Services	24%
<i>Pumpkin and leaf collection</i>	10%
<i>Trash/Trash collection</i>	6%
<i>Snow removal</i>	6%
<i>Calgary transit/Calgary transit services</i>	3%
Water conservation	14%
City News	9%
<i>Road closures/Traffic lane closures</i>	7%
<i>It was regarding the mayor</i>	2%
Recreation/Activities	8%
<i>Parks and recreation</i>	5%
<i>Events around town/Tourism in the city</i>	2%
City Information	6%
<i>The City of Calgary/City services/the number 311</i>	4%
Construction/Development	7%
<i>LRT/LRT construction updates</i>	4%
<i>Improvements to infrastructure/Bridge/road construction</i>	3%
Healthcare	4%
<i>Healthcare/Health information</i>	2%
<i>Flu shots</i>	2%
Safety	2%
<i>Cycling/Bike lanes</i>	2%
Other mentions	6%
Don't know	26%

"The ads were regarding the garbage recycling system."

"Water consumption in the summer time and recycling bins."

"Information about waste collection - in particular about leaf and pumpkin drop off."

Without being prompted, Calgarians are able to recall the recent "Report to Calgarians" TV segments. Mainly, Calgarians recall environmental or recycling information followed by city services information such as pumpkin and leaf collection and trash collection and water conservation information.

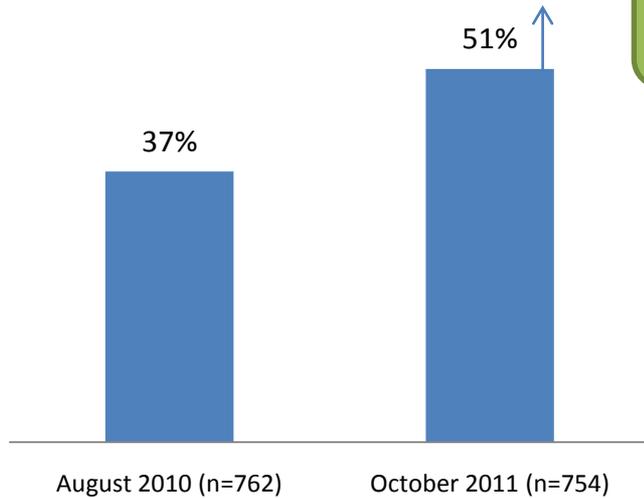
Mentions less than 2% are not included.



AIDED AWARENESS OF “REPORT TO CALGARIANS”

Have seen “Report to Calgarians” within the past 6 months

Aided Message Recall



“Water - how to save water in homes and yards.”

“I saw the one that I just viewed.”

“I don't recall any others.”

↑ = significant increase since last survey period

Calgarians who are aware of the “Report to Calgarians”	October 2011 (n=390)
Water Conservation	15%
Environmental/Recycling	14%
<i>Recycling/Compost waste</i>	8%
<i>Blue and black bins</i>	6%
<i>Conserving electricity</i>	2%
City Services	11%
<i>Pumpkin and leaf collection</i>	7%
<i>Trash/Trash collection</i>	3%
<i>Snow removal</i>	2%
City News	8%
<i>Improvements to the transit system in Calgary</i>	5%
<i>Road closures/Traffic lane closures</i>	3%
Safety	3%
<i>Driving tips</i>	2%
Other mentions	6%
Don't know	52%

Mentions less than 2% are not included.

Aided awareness of “Report to Calgarians” has increased significantly since August 2010 and is higher among Calgarians who have a copy of the corporate calendar in their household. However, once presented with an example video, Calgarians who are aware are unable to recall alternate messages. The main message recalled is water conservation.





IMPACT OF “REPORT TO CALGARIANS”

“Made our dedication to separating recyclables greater.”

“We recycle all the time now.”

<i>Calgarians who are aware of the “Report to Calgarians”</i>	August 2010 (n=275)	October 2011 (n=390)
Environmental/Recycling	1%	22%
<i>Proper black, blue, green bin placement</i>	-	12%
<i>I recycle now/more/properly</i>	1%	10%
<i>I use a composter/I am more aware of composting/collecting leaves/pumpkins</i>	-	2%
General city awareness/I’ll try to follow the given instructions	12%	13%
Yes/Positively/Found them informative/helpful	8%	5%
I am more water wise	6%	4%
They have been somewhat influential/A little bit	4%	2%
Election reminders	7%	-
Found them interesting	2%	-
Influenced driving	2%	-
No/Not at all	52%	51%
I don’t know/Refusal	11%	5%

“They keep us informed and engaged in the city.”

The various “Reports to Calgarians” have positively influenced the recycling and composting habits of Calgarians in 2011. However, the proportion who report no influence remains the same compared to August 2010.

Older Calgarians (aged 55 or older) are less likely to indicate that the “Reports to Calgarians” influenced their recycling habits when compared to younger age groups.

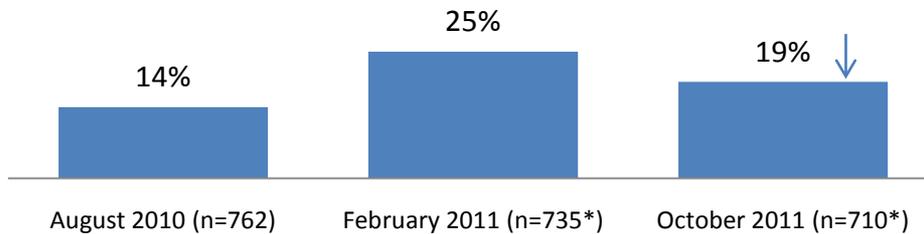
USE OF THE CITY
OF CALGARY
CORPORATE
WALL CALENDAR



CALENDAR IN HOUSEHOLD

Have copy of The City of Calgary corporate calendar in household

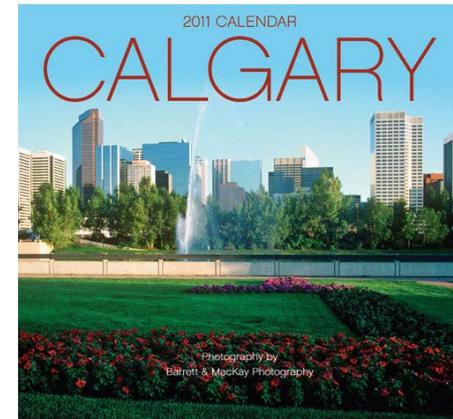
Incidence of keeping the corporate calendar has decreased since February of this year but remains higher than the August 2010 benchmark.



↓ = significant decrease since last survey period

*Don't know excluded for trending purposes (February 2011: 4%, October 2011: 6%)

A higher proportion of Calgarians with children versus those without children in their households have a copy of the corporate calendar.



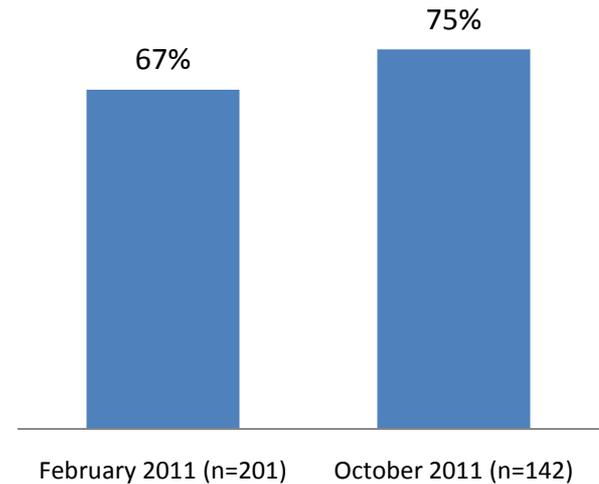


CALENDAR USES

Main Use of Calendar

Calgarians with calendar in household	August 2010 (n=105)	February 2011 (n=201)	October 2011 (n=142)
Keeping track of dates/events	37%	29%	31%
Keeping track of appointments	27%	14%	21%
Checking the day of the week	2%	21%	16%
Family agenda/activities	2%	9%	11%
Verifying holidays	11%	12%	10%
Messages/reminders	2%	5%	5%
Using it as a calendar (unspecified)	16%	-	-
Marking paydays*	4%	-	-
Other mentions	10%	3%	1%
I don't know/Refusal/Don't use it	24%	7%	6%

Find city events information in calendar useful (among Calgarians who have calendar in household)



In the August 2010 study, respondents were asked to write their own use whereas in both 2011 studies, respondents were asked to choose from a pre-defined list of possible usages.

Keeping track of dates and events/appointments and checking the day of the week continue to be the main uses of the calendar. Usefulness of the calendar with regards to city events has increased slightly over the year, likely due to increased familiarity with the calendar.



PROFILE OF RESPONDENTS



PROFILE OF RESPONDENTS



<i>Calgarians</i>	n=754
Gender	
Male	50%
Female	50%
Age	
18-24 years of age	6%
25-34 years of age	28%
35-44 years of age	21%
45-54 years of age	20%
55-64 years of age	12%
65-74 years of age	10%
75+ years of age	2%
Marital Status	
Single, never married	23%
Married or living in common law	65%
Widowed	3%
Separated	2%
Divorced	5%



PROFILE OF RESPONDENTS



<i>Calgarians</i>	n=754
Children in Household	
None	63%
Children YOUNGER than 12 years of age ONLY	22%
Children 12 years of age or OLDER ONLY	10%
Children 12 years of age and older AND younger than 12 years of age	5%
First Language	
English	79%
French	3%
Other	8%
English and other	7%
English and French	1%
Education	
Elementary (7 years or less)	1%
High school, general or professional (8 to 12 years)	18%
College pre-university, technical training, certificate (CEP)	25%
University certificates and diplomas	8%
University Bachelor's degree (including classical studies)	35%
University Master's degree	11%
University Doctorate (PhD)	2%



PROFILE OF RESPONDENTS



<i>Calgarians</i>	n=754
Occupation	
Office worker (cashier, office clerk, accounting clerk)	12%
Personnel specialized in sales (insurance agent, sales person)	6%
Personnel specialized in services (security agent, taxi driver)	5%
Manual workers (farmer, packer, unskilled worker, minor, fisher)	1%
Skilled, semi-skilled workers (bricklayer, truck driver, electrician)	7%
Science and technologies workers (computer operator, programmer)	6%
Professionals (archeologist, architect, artist, lawyer, banker)	20%
Managers/administrators/owners (director, editor, entrepreneur)	12%
Homemaker	7%
Student (full-time or whose studies take up most of his/her time)	5%
Retired (pre-retired or private means)	14%
Unemployed (unemployment, welfare)	3%
Annual Household Income	
\$19,999 or less	4%
\$20,000 to \$39,999	9%
\$40,000 to \$59,999	10%
\$60,000 to \$79,999	14%
\$80,000 to \$99,999	17%
\$100,000 or more	27%
I prefer not to answer	19%