2020 Citizen Perspectives Survey Report
Buy Local

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Background & Methodology

Background

To help support City decisions, The City of Calgary surveys citizens about their opinions, preferences and attitudes. To help in "making life better every day" for Calgarians, The City conducts the Citizen Perspectives Survey at various intervals through the year. In late 2019, a wave of the Citizen Perspectives Survey focused on opinions and perceptions of 'buy local' defined as: purchasing from locally-owned businesses instead of retail chains and non-locally owned service providers. Locally-owned businesses include those with headquarters in Calgary, franchises owned by Calgarians, and farmer's markets. The survey was conducted at the beginning of November, when The City's Buy Local campaign launched. This wave is a reiteration of that survey in order to assess if there were any changes in perceptions and behaviour since the campaign began.

Methodology

The survey was conducted by Leger from February 24 – March 4, 2020 with 500 Calgarians via telephone using random digit dialing (RDD). The survey was conducted using numbers from both landlines (46%) and cell phones (54%) to obtain a random and statistically representative sample of Calgarians. The survey averaged 17 minutes in duration. The margin of error (MOE) for the total sample of n=500 is ± 4.38 percentage points, 19 times out of 20.

To ensure the data was gathered from a representative group of Calgarians, sample quotas were set by age, gender, and city quadrant of the general population aged 18 and older. Data were then weighted to the 2016 Civic Census for age and gender.

Statistically significant differences between results from November 2019 and this wave are noted with:
Differences that aren't noted are not statistically significant.

Key Findings and Overview

Key Findings

- Calgarians' interpretations of the term 'buy local' centered around supporting/buying from local businesses, consistent with the first wave of this survey in November 2019.
- Just under one-half of Calgarians recalled seeing, hearing or reading messaging or advertising with the phrase 'buy local' in the past six months, on par with the first wave results, with grocery stores and TV being the most mentioned sources of the messaging/advertising.
- Among Calgarians who recalled 'buy local' advertising or messaging, approximately three-in-ten couldn't recall the specific message they saw, read or heard.
- While Co-op was the most mentioned sponsor of the 'buy local' advertising or messaging recalled, just over one-half didn't know or couldn't remember who sponsored it.
- Personal importance of buying local didn't change compared to the results from November 2019, with one-third reporting it's 'very important' and one-half saying it's 'somewhat important.'
- Perceived benefits of buying local didn't change from November 2019, with the most mentioned benefits being that it supports our local economy, our local community and/or local businesses.
- Purchases of services and dining out at restaurants were most likely to be purchased from locally-owned businesses while home décor items, kitchenware, clothing and books were least likely.
- Compared to November 2019, this wave saw slightly fewer Calgarians making all or most of their service purchases and purchases of home décor items from locally-owned businesses.

Key Findings – cont'd

- When Calgarians had the option to make a purchase either online from a site such as Amazon or from a locally-owned business or store in Calgary, a minority reported making all or most of these purchases online.

- The most mentioned barriers to buying local more often were the cost (i.e. perception that it's more expensive to buy local) and accessibility issues/difficulty in getting to where local products are sold, consistent with results from November 2019.

- Perceptions about buying local didn't change from November 2019 to this wave, with Calgarians seeming to want to buy local but perceiving it to be more expensive and lacking the variety of products available from large retailers.

- Perhaps as a result of having more responsibility for shopping for their household, females were more likely than males to answer questions in a way that suggests they are more aware of benefits and features of buying local.

- Overall, younger Calgarians are less attuned than their older counterparts to buying locally.

Overview

Calgarians' interpretations of the term 'buy local' centered around supporting/buying from local businesses, consistent with the first wave of this survey in November 2019.

- When asked to explain, in their own words (which were then coded into themes), what the term 'buy local' means to them, respondents gave a variety of responses. The top five themes were support your local business (26%), support products made locally in Calgary (23%), shop at/buy from local farmers markets/local farmers (16%), buy products from Calgary businesses (14%) and support products made in Alberta (12%).
- Around one-in-five (17%) responded that they didn't know or were unsure of what the term 'buy local' means to them.

Just under one-half of Calgarians recalled seeing, hearing or reading messaging or advertising with the phrase 'buy local' in the past six months, on par with the first wave results, with grocery stores and TV being the most mentioned sources of the messaging/advertising.

- Recall of messaging or advertising with the phrase 'buy local' didn't change following the Buy Local campaign sponsored by The City. In November 2019, recall was at 42% of Calgarians while this wave, it was 46% (the difference is not statistically significant).
- This wave, respondents who recalled messaging or advertising with the phrase 'buy local' were asked where, specifically, they saw it. This was an open-ended question, meaning respondents weren't provided with a list of possible answers but instead answered in their own words. Around one-in-five (18%) mentioned a grocery store, 16% said they saw it on TV and 12% heard it on the radio. One-in-ten (10%) mentioned Facebook.
    - Few Calgarians who recalled 'buy local' messaging or advertising mentioned City of Calgary channels:
        - 3% - The City's Facebook page
        - 1% - The City's website/Calgary.ca
        - 1% - The City's Instagram account
        - 1% - The City's Twitter account

Overview – cont'd

Among Calgarians who recalled 'buy local' advertising or messaging, approximately three-in-ten couldn't recall the specific message they saw, read or heard.

- When asked to describe, in their own words, what specifically they saw, read or heard about 'buy local,' one-in-ten (8%) didn't know or remember and another 21% said they just remembered hearing the term 'buy local'.
- One-in-five (18%) recalled the message being about locally grown or produced products, 17% repeated 'buy local' as the message, and 16% remembered something about supporting one's community/supporting local.

While Co-op was the most mentioned sponsor of the 'buy local' advertising or messaging recalled, just over one-half didn't know or couldn't remember who sponsored it.

- Slightly more than one-half (56%) of those who recalled 'buy local' advertising or messaging in the past six months didn't know or didn't remember who sponsored it.
- Just under one-in-five (16%) cited Co-op as the sponsor, followed by 8% mentioning farmer's market/farmer's store. Safeway was mentioned by 3%, Sobey's by 1% and 5% mentioned a grocery store other than Co-op, Safeway and Sobey's.
- The City of Calgary was mentioned by 3% of Calgarians who recalled seeing, hearing or reading messaging or advertising with the phrase 'buy local.'

Overview – cont'd

Personal importance of buying local didn't change compared to the results from November 2019, with one-third reporting it's 'very important' and one-half saying it's 'somewhat important.'

- Before being asked the remaining survey questions, respondents were read the following "For the purpose of the next few questions, 'buy local' refers to purchasing from locally-owned businesses instead of retail chains and non-locally owned service providers. Locally-owned businesses include those with headquarters in Calgary, franchises owned by Calgarians, and farmer's markets."
    - Consistent with the results from November 2019, one-third (34%) of Calgarians reported it's 'very important' to them personally to buy local and one-half (50%) said it's 'somewhat important.' It's considered 'not very important' by one-in-ten (11%).

Perceived benefits of buying local didn't change from November 2019, with the most mentioned benefits being that it supports our local economy, our local community and/or local businesses.

- Respondents were asked to list the benefits of buying local in their own words. The most mentioned benefit was that it supports our local economy (46%), followed by it supports our local community (35%) and it helps local businesses (33%).

- Other benefits were mentioned by only a small minority of Calgarians and included better quality products/fresher products (12%) and that buying local provides jobs locally (11%).

Overview – cont'd

Purchases of services and dining out at restaurants were most likely to be purchased from locally-owned businesses while home décor items, kitchenware, clothing and books were least likely.

- Around one-half (47%) of Calgarians reported having made all or most of their purchases of services (e.g. auto repair, home repair/maintenance, florists, health/wellness) in the past six months from a locally-owned business and 45% said all or most of their dining out purchases were made at locally-owned restaurants.

- Purchases of items that are widely available at department stores and other big box/chain stores – books, clothing, kitchenware and home décor items – were least likely to be made at locally-owned businesses.

Type of Purchase	All or Most Purchased from a Locally-owned Business*
Services	47%
Dining out at restaurants	45%
Groceries	34%
Coffee shops	30%
Alcohol	28%
Books	17%
Clothing	14%
Kitchenware	12%
Home décor items	10%

*excludes those who said they didn't make this type of purchase

Overview – cont'd

Compared to November 2019, this wave saw slightly fewer Calgarians making all or most of their service purchases and purchases of home décor items from locally-owned businesses.

- In early November 2019, just over one-half (56%) of Calgarians reported having made all or most of their service purchases (e.g. auto repair, home repair/maintenance, florists, health/wellness) from a locally-owned business in the previous year, compared to 47% this wave.
- In early November 2019, 16% had made all or most of their home décor purchases from a locally-owned business compared to 10% this wave.
- Any differences between November 2019 and this wave for other types of purchases are not statistically significant.

When Calgarians had the option to make a purchase either online from a site such as Amazon or from a locally-owned business or store in Calgary, a minority reported making all or most of these purchases online.

- Respondents were asked what portion of their purchases in the past six months were made online from a site such as Amazon in situations when they also had the option to buy it from a locally-owned business or store in Calgary. Approximately one-quarter (28%) reported making all or most of these purchases online from a non-locally-owned business. Two-in-five (40%) purchased some online from a non-locally-owned business and one-third (32%) answered 'none.'

Overview – cont'd

The most mentioned barriers to buying local more often were the cost (i.e. perception that it's more expensive to buy local) and accessibility issues/difficulty in getting to where local products are sold, consistent with results from November 2019.

- One-third (34%) of Calgarians mentioned a barrier related to it being more expensive to buy local and one-quarter (27%) cited accessibility issues or the inconvenience of getting to where local products are available.
- One-in-five (18%) said a barrier to them buying local more often is lack of local availability/seasonality of specific local products (e.g. fruits and vegetables).
- As in November 2019, one-in-five (18%) reported that nothing prevents them from buying local more often.

Overview – cont'd

Perceptions about buying local didn't change from November 2019 to this wave, with Calgarians seeming to want to buy local but perceiving it to be more expensive and lacking the variety of products available from large retailers.

- Most Calgarians continue to agree ('strongly' or 'somewhat') that buying local can help the economy (97%) and that when we buy local, it creates jobs for Calgarians (96%), consistent with November 2019 results.
- A strong majority (84%) agree ('strongly' or 'somewhat') that they prefer to buy local whenever possible; however, as many agree that buying from locally-owned businesses tends to be more expensive than buying from large retail chains (86%) and nearly as many (81%) agree that buying from large retailers gives them access to a better variety of products.
- Calgarians agree that buying local can help the environment (80%), they would pay a bit more to buy local (76%), buying local gives them access to better quality products (76%), and they know how to determine if a business is locally-owned (73%).
- Just over one-half (58%) agree that it's important to them to be able to purchase most or all items they need from one store.

Overview – cont'd

Perhaps as a result of having more responsibility for shopping for their household, females were more likely than males to answer questions in a way that suggests they are more aware of benefits and features of buying local.

- More females than males said they're responsible for all or most of their household's shopping (82% vs. 58%).
- More than twice as many females as males cited Facebook (in general) as where they saw, read or heard advertising or messaging with the phrase 'buy local' (13% vs. 5%).
- Females were more likely than males to report that it's important ('very' or 'somewhat') to them personally to buy local (91% vs. 78%) and less likely to have chosen to make all or most purchases online from a site like Amazon rather than from a locally-owned business when the latter was also an option (20% vs. 37% of males).
- Compared to males, more females mentioned "helps local businesses" as a benefit of buying local (39% vs. 26%).
- More females than males:
  - Agreed 'strongly' that buying local creates jobs for Calgarians (78% vs. 64%);
  - Agreed ('strongly' or 'somewhat') that they prefer to buy local whenever possible (88% vs. 79%);
  - Agreed ('strongly' or 'somewhat') buying local can help the environment (86% vs. 73%);
  - Agreed ('strongly' or 'somewhat') that if they want to buy local, they know where to go to find the items or services they need (82% vs. 72%); and
  - Agreed ('strongly' or 'somewhat') that buying local gives them access to better quality products (81% vs. 71%).
- Females were more likely than males to agree ('strongly' or 'somewhat') it's important to them that they be able to purchase most or all items they need from one store (65% vs. 52%) but less likely to agree 'strongly' that buying from large retailers gives them access to a better variety of products that buying local does (23% vs. 36%).

Overview – cont'd

Overall, younger Calgarians are less attuned than their older counterparts to buying locally.

- Compared to their older counterparts, Calgarians aged 18 to 24 years were more likely to answer "don't know" when asked what the term 'buy local' means to them (35% of 18 – 24 vs. 19% 25 – 34, 14% 35 – 54, 16% 55 – 64 and 10% 65 or older).
- Recall of seeing, hearing or reading messaging or advertising with the phrase 'buy local' was much lower among 18 to 24 year olds than among older Calgarians (23% vs. 44% 25 – 34, 52% 35 – 54, 45% 55 – 64 and 52% 65 or older).
- Younger Calgarians are less likely to have made *all or most* of their purchases of services, clothing and home décor items from a locally-owned business in the past six months.

	All or Most* Purchased from a Locally-owned Business				
	18 – 24 yrs	**25 – 34 yrs**	**35 – 54 yrs**	**55 – 64 yrs**	**65+ yrs**
Services	30%	40%	49%	64%	54%
Clothing	2%	16%	12%	17%	22%
Home décor items	3%	3%	15%	10%	16%

*excludes those who said they didn't make this type of purchase

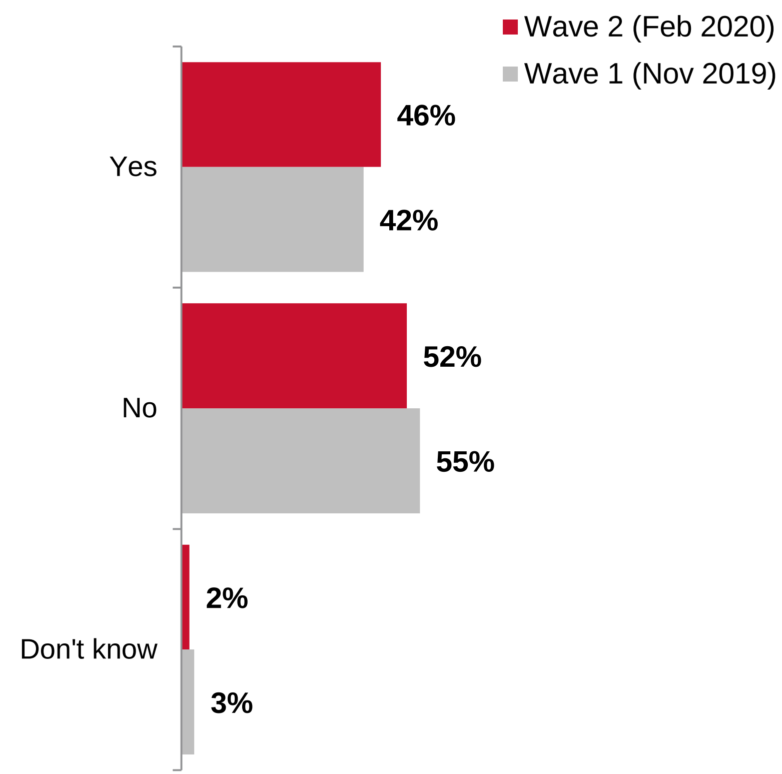
- Calgarians younger than 35 were much less likely than those 35 or older to have purchased *all* of their groceries in the past six months from a locally-owned business (5% 18 – 24 and 1% 25 – 34 vs. 18% 35 – 54, 21% 55 – 64 and 22% 65+).
- Those aged 55 years or older were less likely than younger Calgarians to report having made *all or most* purchases online from a site like Amazon rather than from a locally-owned business when the latter was also an option (23% 55 – 64 and 11% 65+ vs. 35% 18 – 24, 37% 25 – 34, and 30% 35 – 54).
- Compared to Calgarians aged 25 or older, fewer 18 to 24 year olds reported being responsible for *all or most* of their household's shopping (53% of 18 – 24 vs. 74% 25 – 34, 72% 35 – 54, 66% 55 – 64 and 77% 65 or older).

Detailed Findings

Interpretation and Recall of ‘Buy Local’

Respondents’ Interpretation of the Term ‘Buy Local’

Recall Seeing/Hearing/Reading Messaging or Advertising with the Phrase ‘Buy Local’



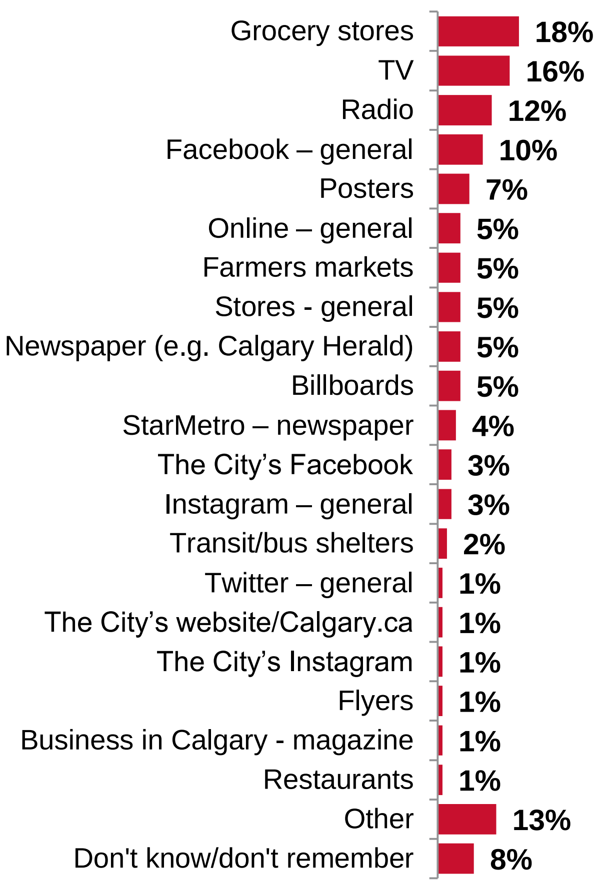
BL1. What does the term ‘buy local’ mean to you?
[NOTE: Response options were not read to the respondent.]
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

BL2. In the past six months, do you recall seeing, hearing, or reading any messaging or advertising with the phrase ‘buy local’?
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Source and Message Recall of ‘Buy Local’

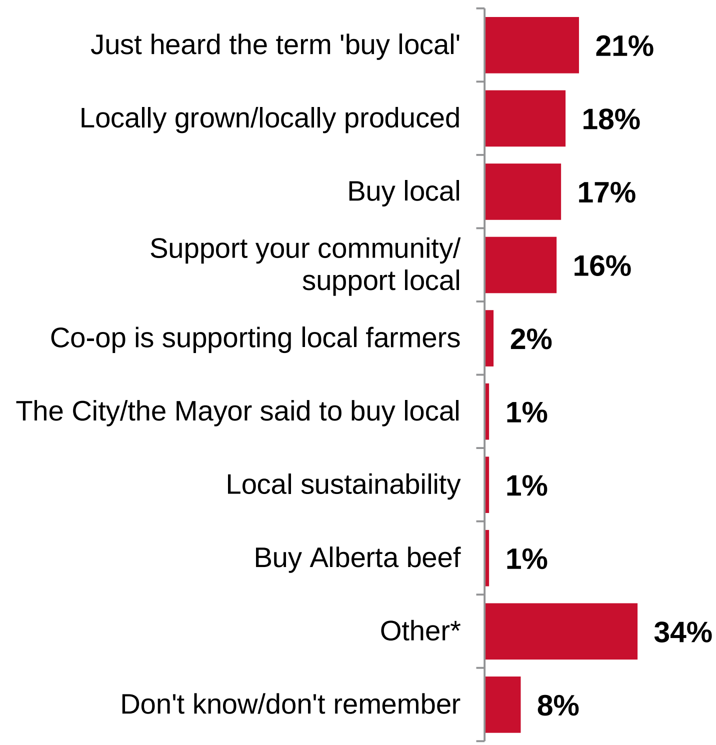
Note: New questions in Wave 2 (Feb 2020)

Source of Messaging/Advertising Recalled



Multiple responses allowed

What the Respondent Saw, Read or Heard about ‘Buy Local’



*”Other” includes categories of less than 1% and responses that referred to *where* they saw ‘buy local’ ads/messaging as opposed to the *message* recalled.

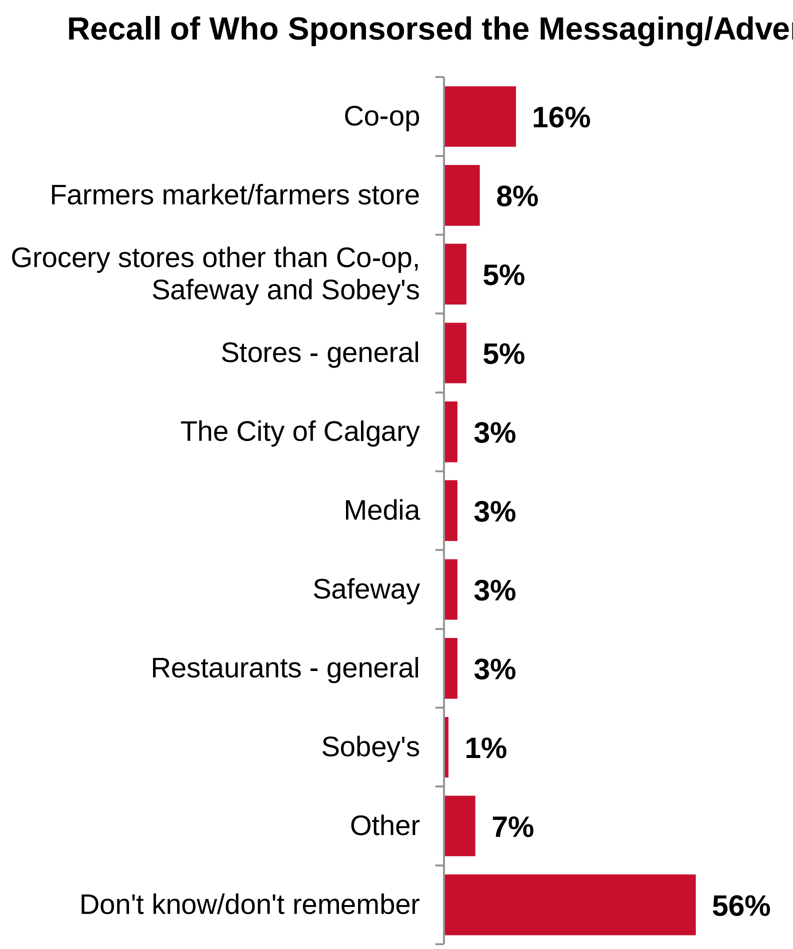
BL3_1. Where did you see, read, or hear this?
[NOTE: Response options were not read to the respondent.]

BL3_2. What, specifically, have you seen, read or heard about ‘buy local’?
[NOTE: Response options were not read to the respondent.]

Base: Respondents who recall seeing, hearing, or reading any messaging or advertising with the phrase ‘buy local’ in the past six months (n=239)

Sponsor Recall of 'Buy Local'

Note: New question in Wave 2 (Feb 2020)

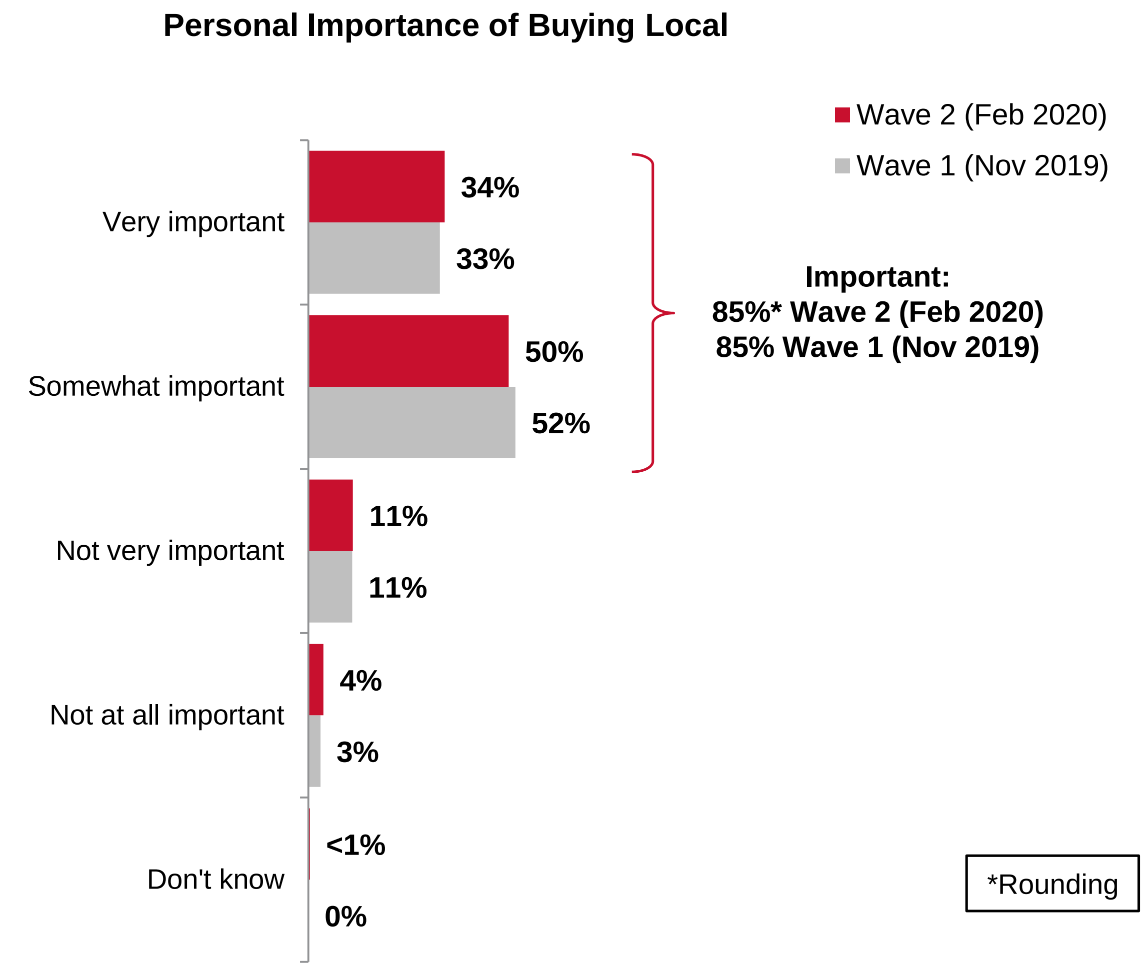


Multiple responses allowed

BL3_3. Which business or organization sponsored the 'buy local' advertising or messaging you recall?

Base: Respondents who recall seeing, hearing, or reading any messaging or advertising with the phrase 'buy local' in the past six months (n=239)

Importance of Buying Local

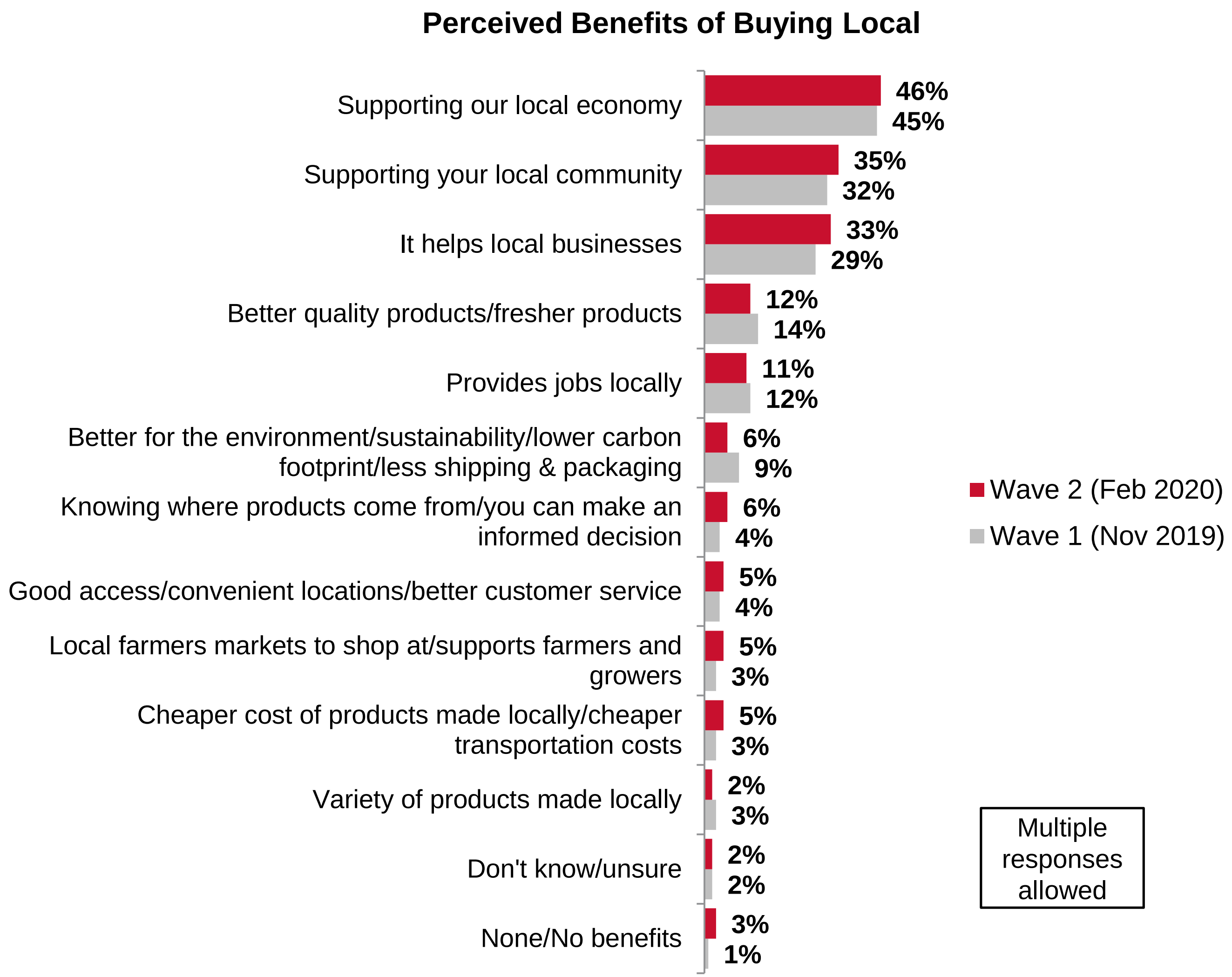


For the purpose of the next few questions, ‘buy local’ refers to purchasing from locally-owned businesses instead of retail chains and non-locally owned service providers. Locally-owned businesses include those with headquarters in Calgary, franchises owned by Calgarians, and farmer’s markets.

BL4. How important is it to you personally to buy local?

Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

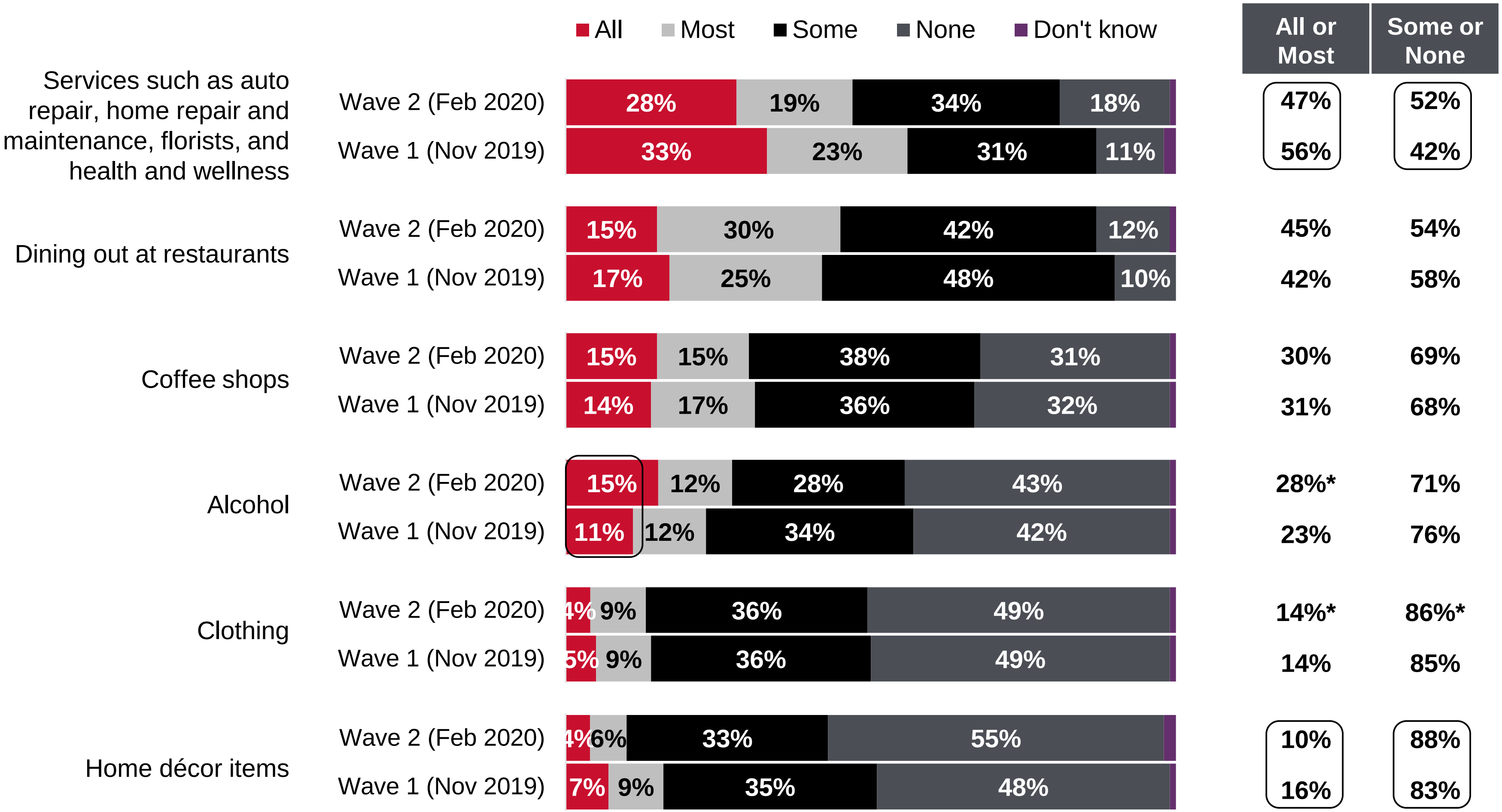
Benefits of Buying Local



BL5. In your opinion, what – if any – are the benefits of buying local? [NOTE: Response options were not read to the respondent.]
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Proportion of Purchases from Local Businesses

Amount of Purchases from Locally-owned Businesses by Product/Service Category



*Rounding

BL7. For each of the following, please tell me if you made all, most, some or none of your purchases in the past 6 months from a locally-owned business. (NOTE: The timeframe for this question in Wave 1 was one year).

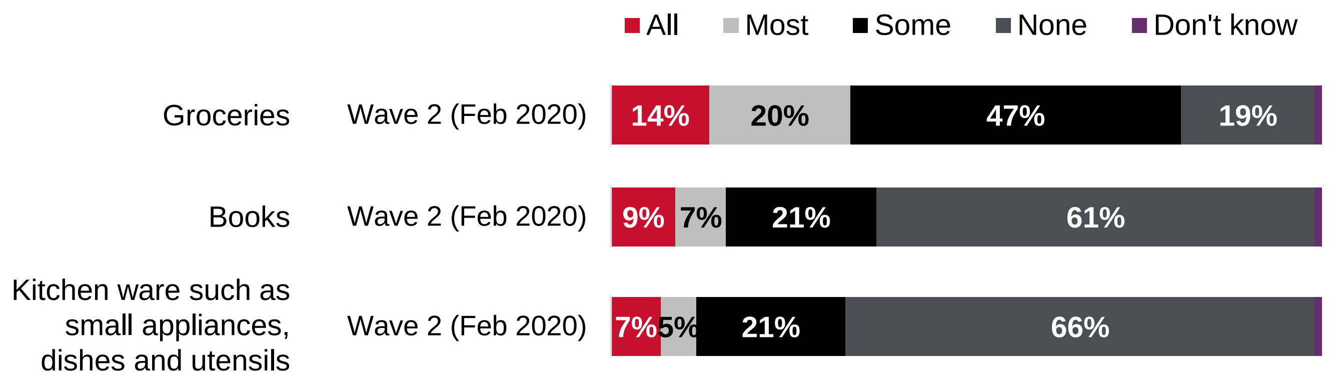
Base: Respondents who have made that type of purchase in the past 6 months (n=varies)

= Difference is statistically significant

Proportion of Purchases from Local Businesses

Amount of Purchases from Locally-owned Businesses by Product/Service Category

Note: These items were new in the Wave 2 (Feb 2020) survey



	All or Most	Some or None
Groceries	34%	66%
Books	17%*	82%
Kitchen ware such as small appliances, dishes and utensils	12%	88%*

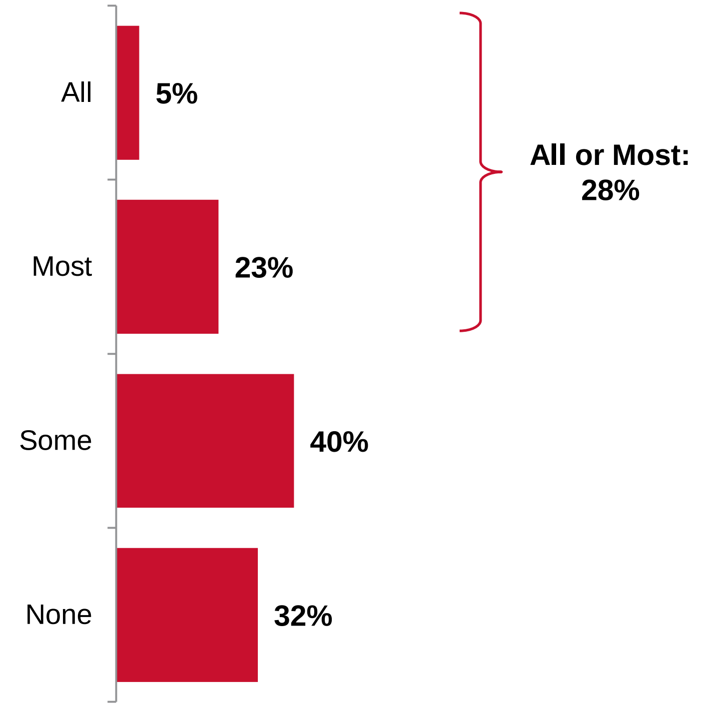
*Rounding

BL7. For each of the following, please tell me if you made all, most, some or none of your purchases in the past 6 months from a locally-owned business.
Base: Respondents who have made that type of purchase in the past 6 months (n=varies)

Shopping Online vs. Buying Locally

Note: New question in Wave 2 (Feb 2020)

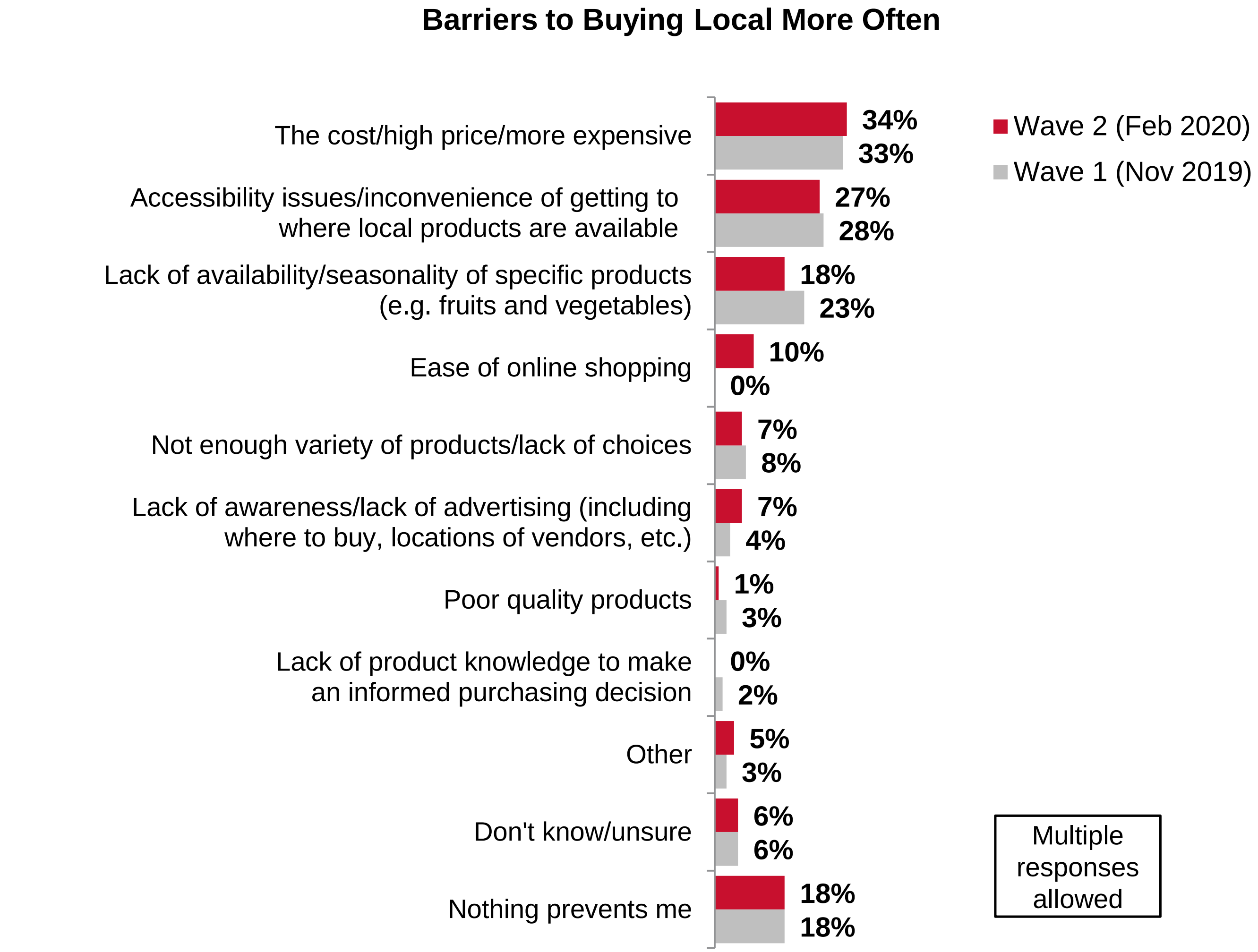
Proportion of Purchases Made Online from Amazon or Similar (vs. from a Locally-Owned Business)



BL12. Thinking about all of your purchases in the past 6 months, when you had the option to buy online from a site such as Amazon, or to buy from a locally-owned business or store in Calgary, approximately what portion were purchased online from a non-locally owned business? Would you say all, most, some, or none of these purchases were made online from a site such as Amazon?

Base: All respondents (n=500)

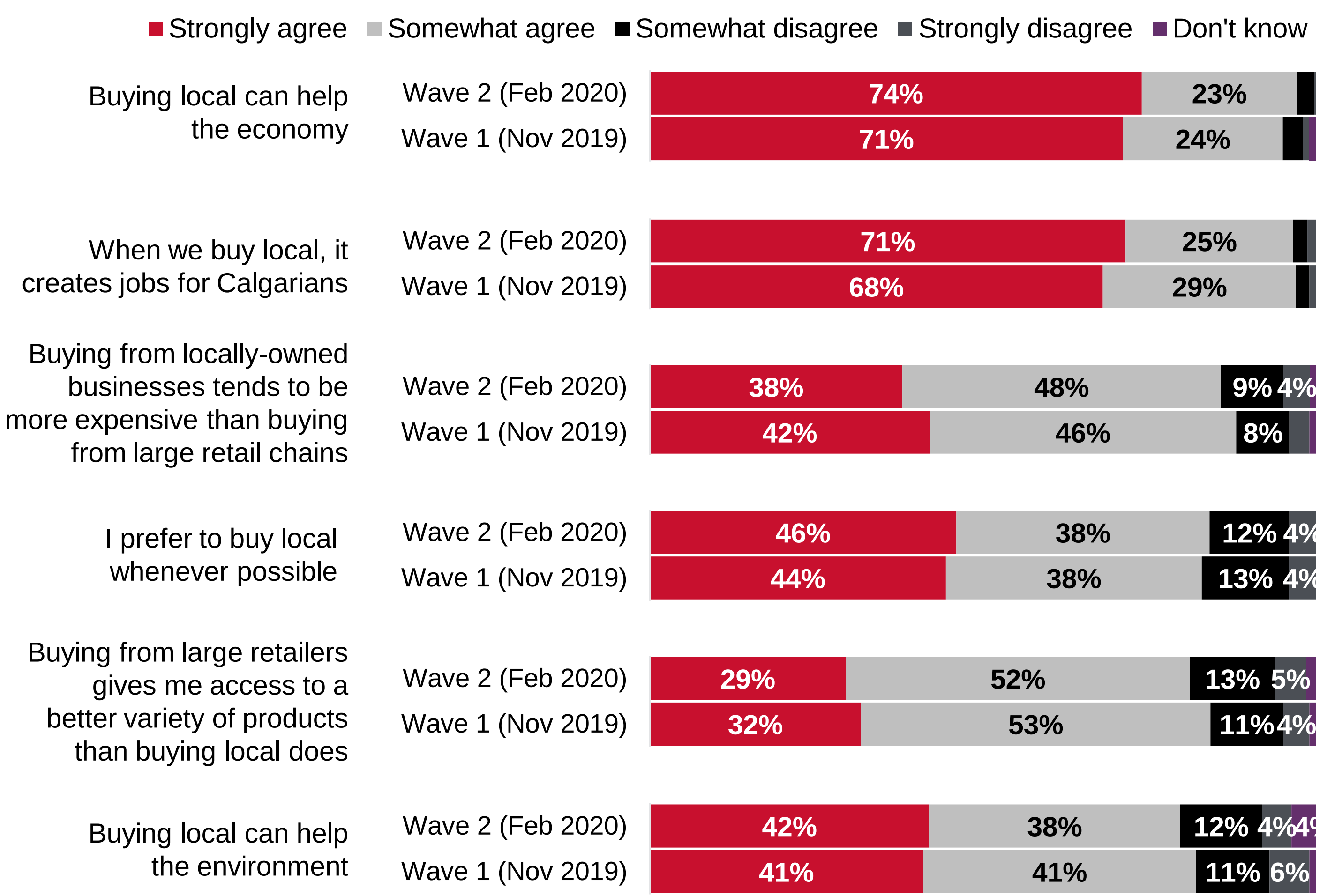
Barriers to Buying Local



BL8. Is there anything that prevents you from buying local more often? [NOTE: Response options were not read to the respondent.]
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Perceptions about Buying Local

Statements about Buying Local



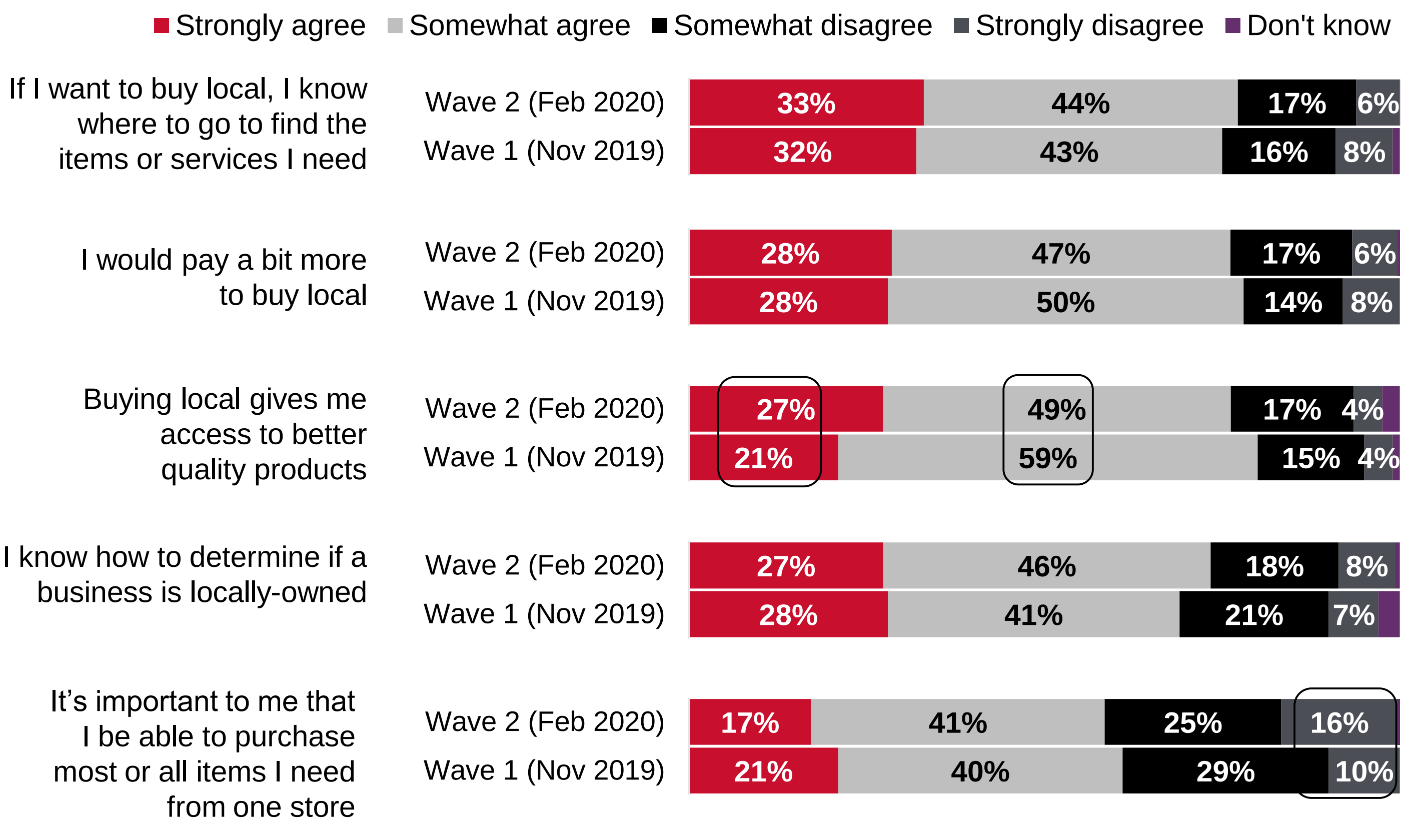
Statement	Wave	Agree	Disagree
Buying local can help the economy	Wave 2 (Feb 2020)	97%	3%
	Wave 1 (Nov 2019)	95%	4%
When we buy local, it creates jobs for Calgarians	Wave 2 (Feb 2020)	96%	3%
	Wave 1 (Nov 2019)	96%*	3%
Buying from locally-owned businesses tends to be more expensive than buying from large retail chains	Wave 2 (Feb 2020)	86%	13%
	Wave 1 (Nov 2019)	88%	11%
I prefer to buy local whenever possible	Wave 2 (Feb 2020)	84%	16%
	Wave 1 (Nov 2019)	83%*	17%
Buying from large retailers gives me access to a better variety of products than buying local does	Wave 2 (Feb 2020)	81%	17%
	Wave 1 (Nov 2019)	85%	15%
Buying local can help the environment	Wave 2 (Feb 2020)	80%	17%*
	Wave 1 (Nov 2019)	82%	17%

*Rounding

BL10. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Perceptions about Buying Local – cont'd

Statements about Buying Local



Statement	Wave	Agree	Disagree
If I want to buy local, I know where to go to find the items or services I need	Wave 2 (Feb 2020)	77%	23%
	Wave 1 (Nov 2019)	75%	24%
I would pay a bit more to buy local	Wave 2 (Feb 2020)	76%*	24%*
	Wave 1 (Nov 2019)	78%	22%
Buying local gives me access to better quality products	Wave 2 (Feb 2020)	76%	21%
	Wave 1 (Nov 2019)	80%	18%*
I know how to determine if a business is locally-owned	Wave 2 (Feb 2020)	73%	26%
	Wave 1 (Nov 2019)	69%	28%
It's important to me that I be able to purchase most or all items I need from one store	Wave 2 (Feb 2020)	58%	41%
	Wave 1 (Nov 2019)	61%	39%

*Rounding

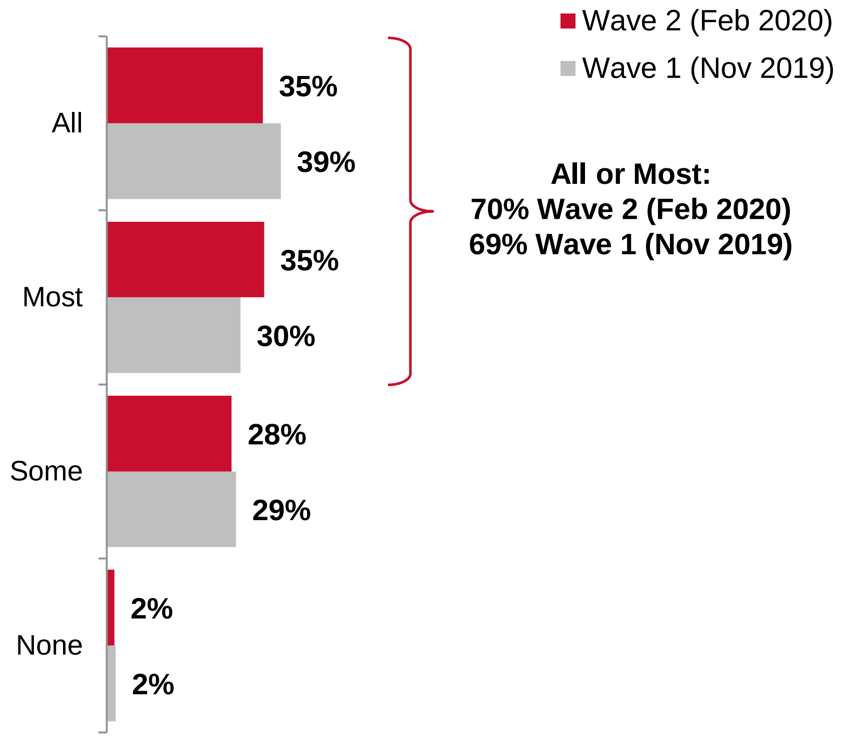
[box] = Difference is statistically significant

BL10. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Household Shopping Responsibility

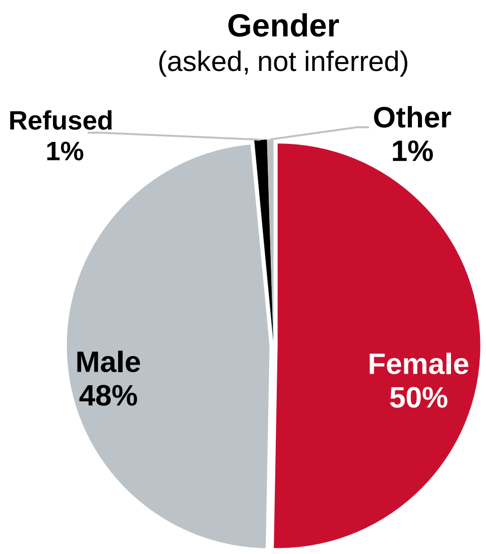
Respondents' Proportion of Household Shopping for which They're Responsible

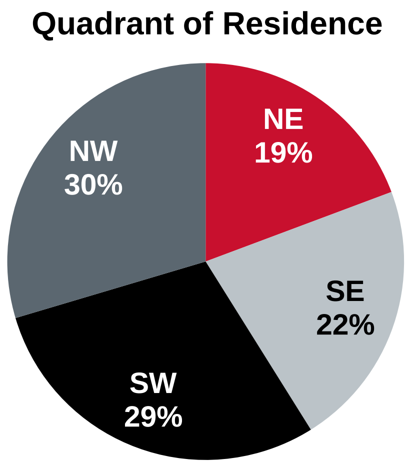


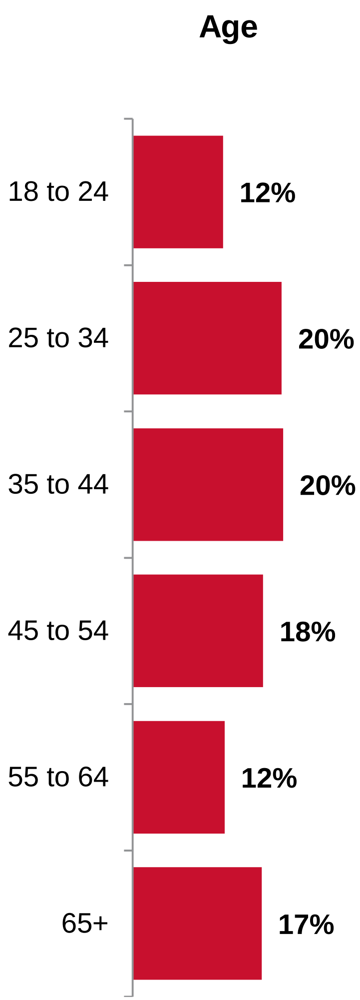
BL11. How much of your household shopping are you responsible for?
Base: All respondents (n=500 in Wave 2, n=503 in Wave 1)

Demographics

Demographics

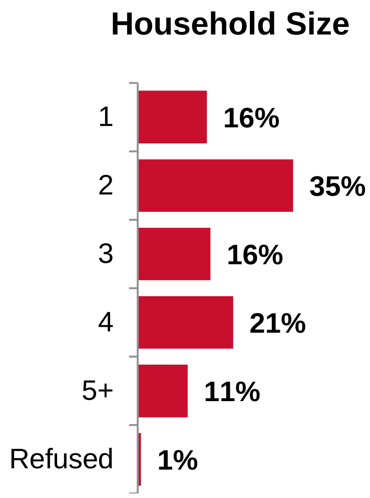


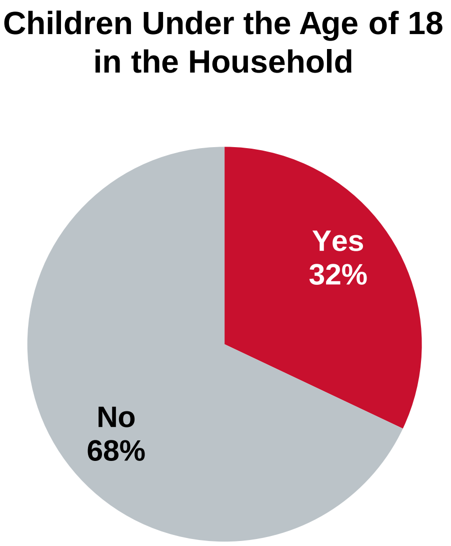


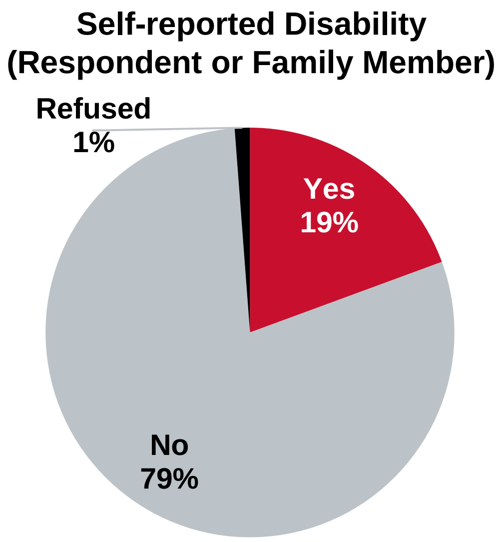


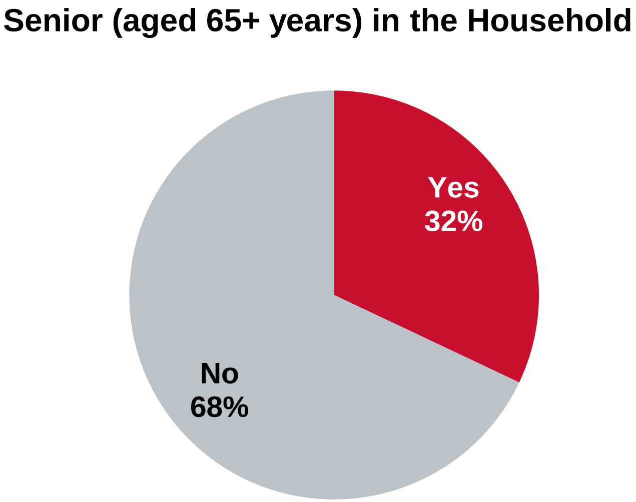
Base: All respondents (n=500), unless otherwise specified

Demographics – cont'd





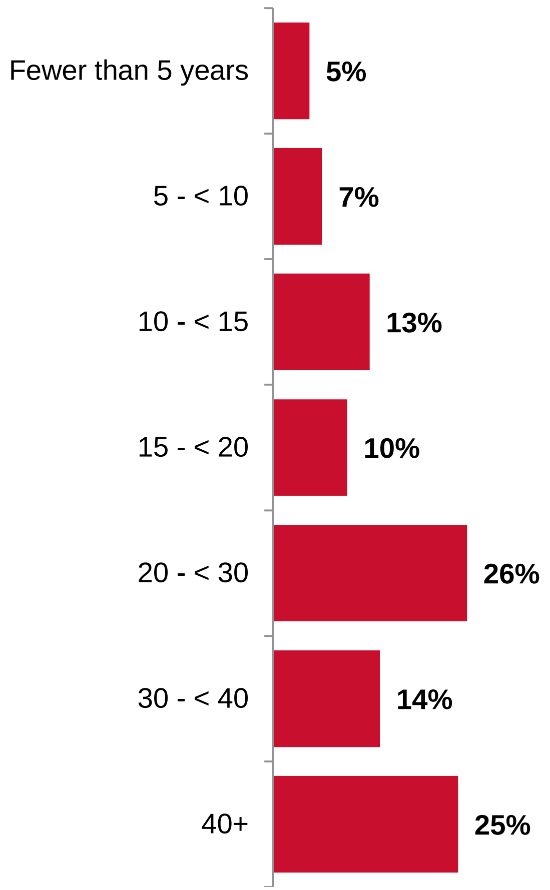




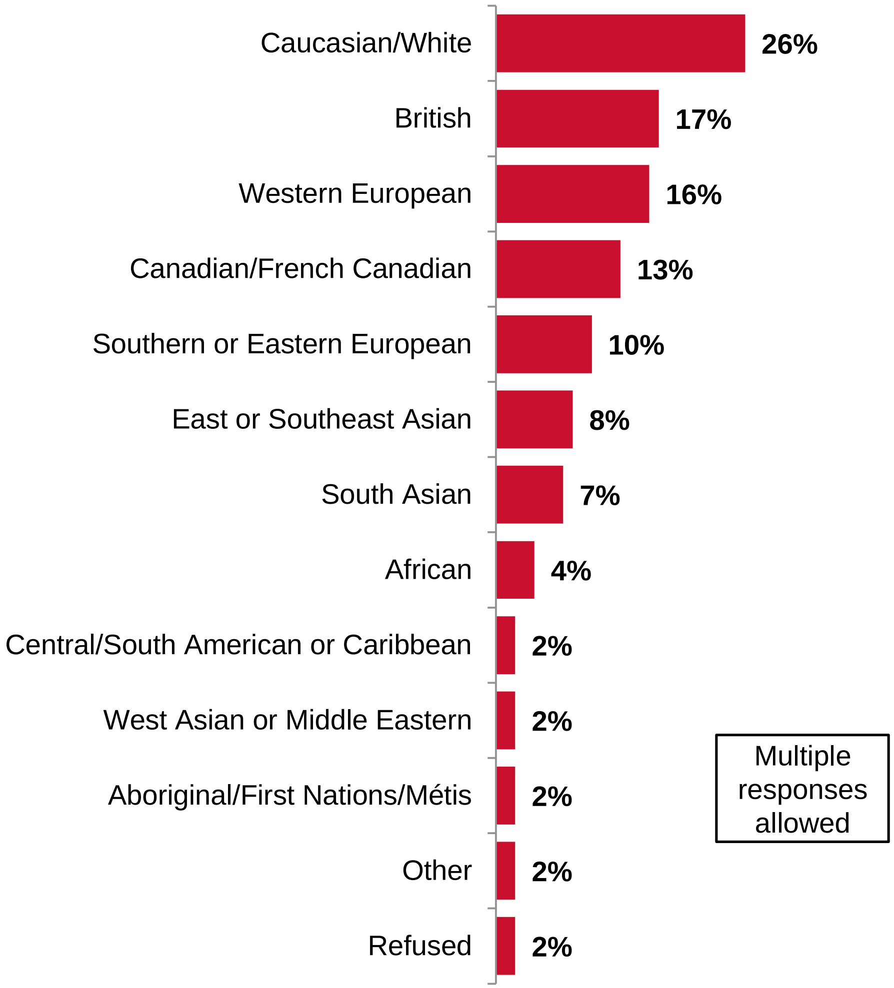
Base: All respondents (n=500), unless otherwise specified

Demographics – cont'd

Years Lived in Calgary



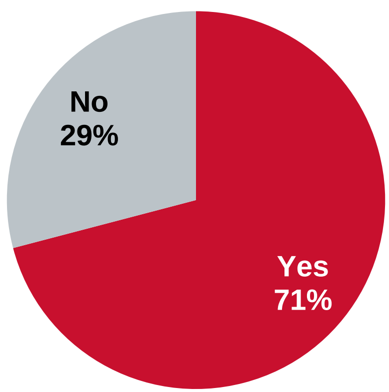
Main Ethnic Background



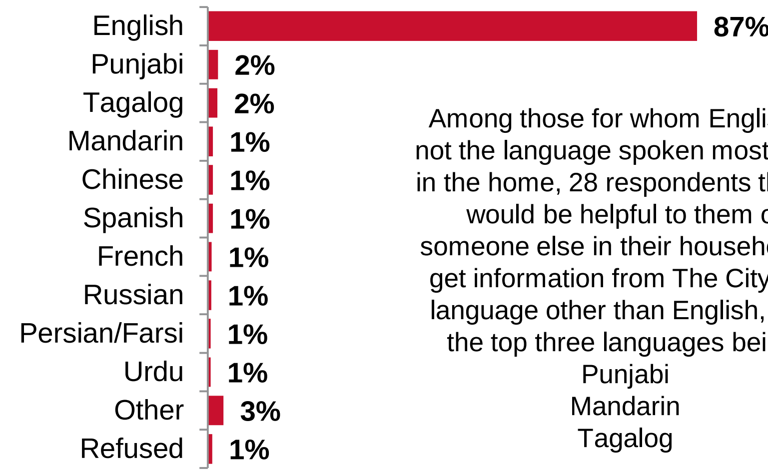
Base: All respondents (n=500), unless otherwise specified

Demographics – cont'd

Born in Canada

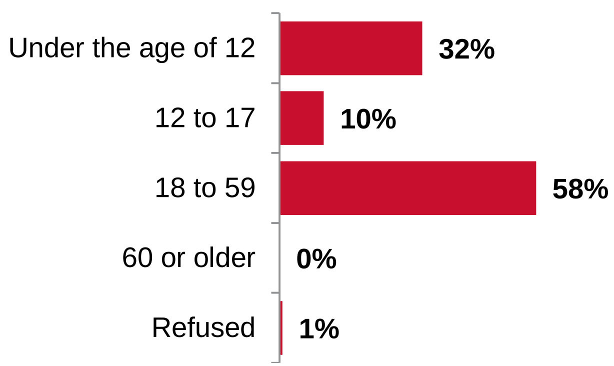


Language Spoken Most in the Home

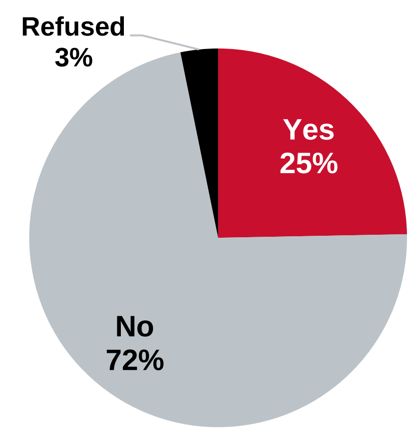


Among those for whom English is not the language spoken most often in the home, 28 respondents think it would be helpful to them or someone else in their household to get information from The City in a language other than English, with the top three languages being:
Punjabi
Mandarin
Tagalog

Age Upon Arrival in Canada
(among those not born in Canada, n=145)



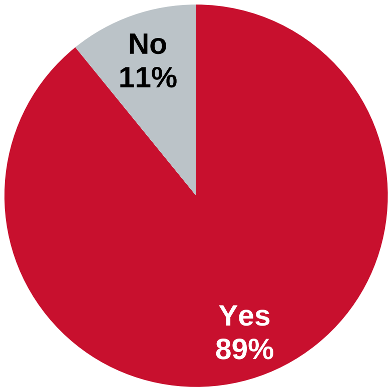
Self-Report as a Member of a Visible Minority



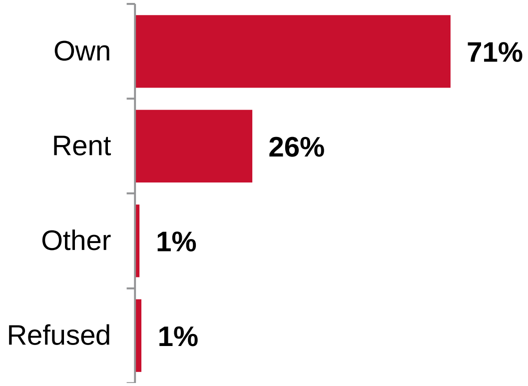
Base: All respondents (n=500), unless otherwise specified

Demographics – cont’d

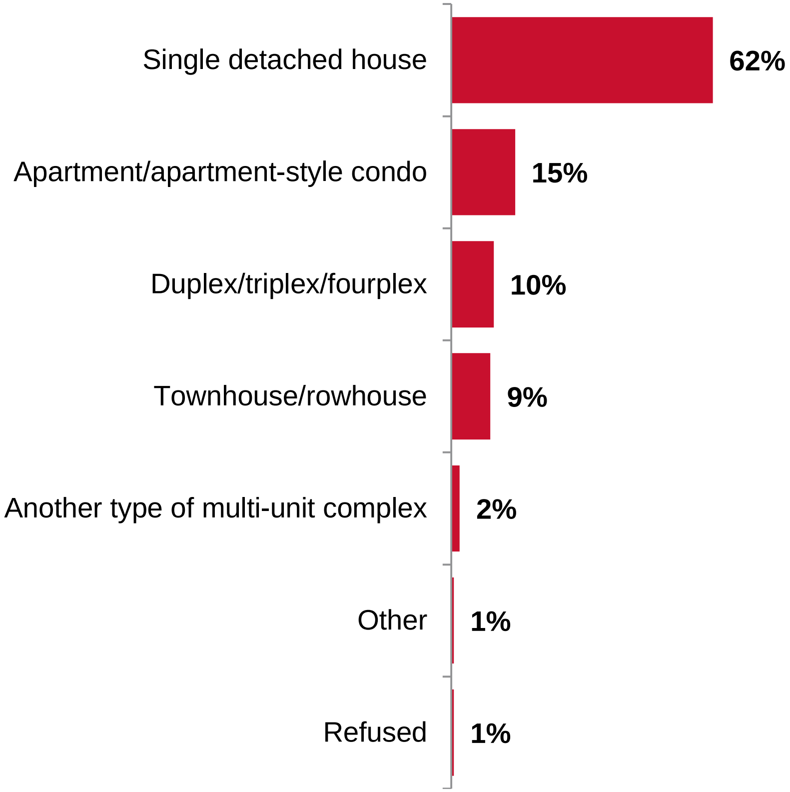
Primarily or Jointly Responsible for Paying Taxes or Rent in Household



Home Ownership



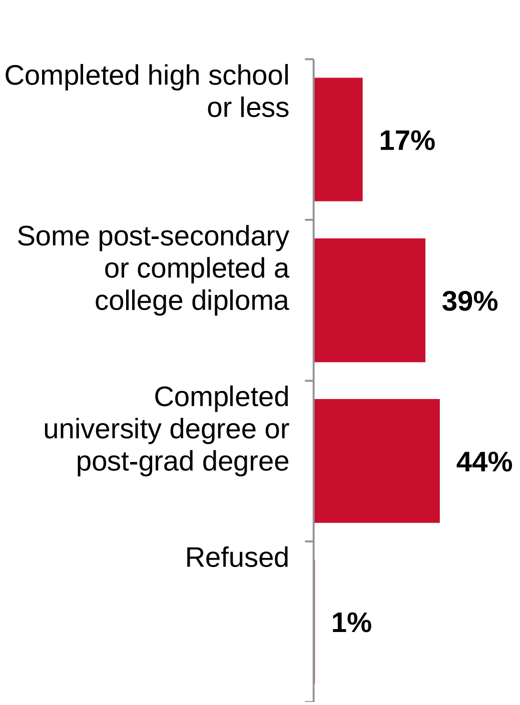
Dwelling Type



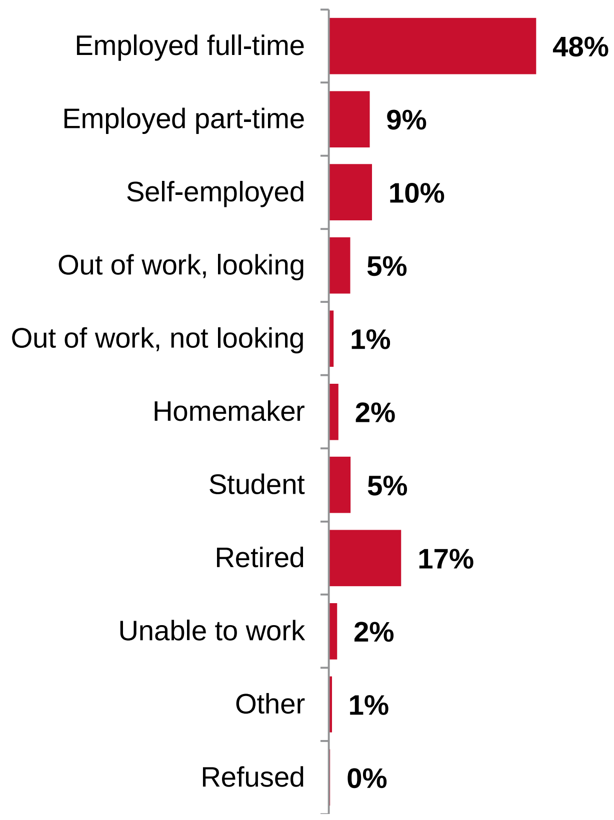
Base: All respondents (n=500), unless otherwise specified

Demographics – cont’d

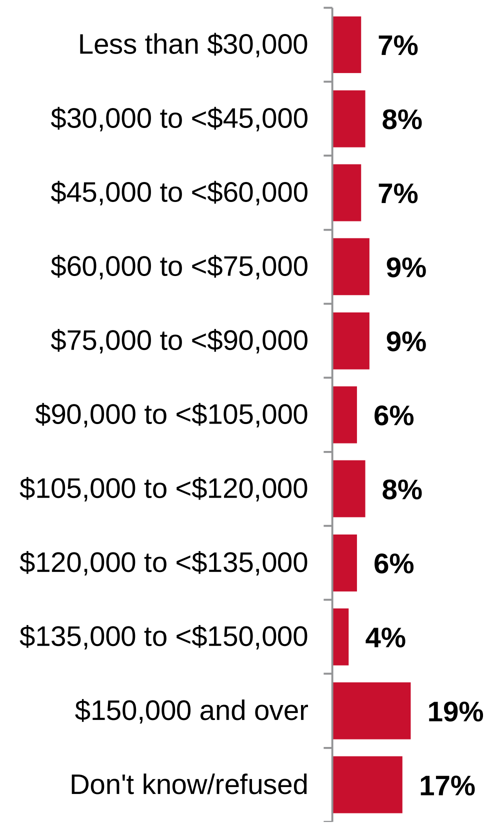
Highest Level of Schooling Obtained



Employment Status



Household Income



Base: All respondents (n=500), unless otherwise specified

Questionnaire

Questionnaire

The City of Calgary 2020 Citizen Perspectives Survey – Wave 1 (Buy Local)
February 18, 2020

INTRODUCTION
Hello, my name is ________________. I'm calling from Leger, a national public opinion research company. I am not selling anything. The City of Calgary has commissioned us to conduct a survey to understand your opinions about living in Calgary.

(INTERVIEWER NOTE: IF CREDIBILITY IS AN ISSUE OR IF RESPONDENT HAS A CONCERN SAY: If you wish to talk to a City official about this survey, we encourage you to contact The City at 311 and specifically mention the "2020 Citizen Perspectives Survey." City staff would be happy to address your concerns.)

The survey will take approximately 15 minutes depending on your answers. Before we begin I have a few questions about you.

I want to let you know that the personal information collected in this survey is done so under the authority of the Freedom of Information and Protection of Privacy Act, Section 33(c) and is used to provide guidance to The City of Calgary when it comes to making decisions regarding municipal matters. If you have questions about the collection or use of your information, please contact a City of Calgary Research Coordinator at 403-268-3617 and specifically mention the "2020 Citizen Perspectives Survey" or send a letter to The City of Calgary, Mail code 8305, P.O. Box 2100, Station M, Calgary, AB Canada T2P 2M5.

SCREENERS

QS7. Are you 18 years of age or older?

1. Yes **[CONTINUE]**
2. No → may I please speak with someone who is? **[REPEAT INTRODUCTION]**
3. No → not qualified / no one available **[THAN K & TERMINATE]**

[TRACK GENDER QUOTAS WITHIN QUADRANTS – BASED ON S3 AND S4]

QSEX. Record Gender **(DO NOT ASK)**
Male
Female

QS4N. In what year were you born?

RECORD YEAR (RANGE 1900 TO 2002) **[SKIP S4]**
9999. Refused **[DO NOT READ – GO TO S4]**

[PROGRAMMER NOTE: CONVERT YEAR TO AGE (CURRENT YEAR – YEAR OF BIRTH)]

QS4. And which of the following age groups do you belong to? Just stop me when I get to your age group.

1. 18 to 19 yrs
2. 20 to 24 yrs
3. 25 to 34 yrs
4. 35 to 44 yrs
5. 45 to 54 yrs
6. 55 to 64 yrs
7. 65 to 74 yrs
8. 75 and older
99. Refused **[DO NOT READ] [THANK AND END SURVEY]**

AGESEX. **[TRACK AGE QUOTAS WITHIN QUADRANTS/GENDER – BASED ON QS5, QS3 AND QS6]**
Male 18 to 34
Male 35 to 54
Male 55 Plus
Female 18 to 34
Female 35 to 54
Female 55 Plus

QS1. Can you tell me which quadrant of the city you live in? **(WAIT FOR RESPONSE – READ LIST TO CLARIFY IF NEEDED)**
1. Southwest
2. Southeast
3. Northwest
4. Northeast
99. (DO NOT READ) Refused **[THANK AND END SURVEY]**
96. (FO NOT READ Does not live in Calgary **[THANK AND END SURVEY]**

Q1. To begin, on a scale of "1" to "10" where "1" represents "very poor" and "10" represents "very good," how would you rate your <u>overall quality of life</u> in the city of Calgary today?

Q1 = [1-10], Refused = 99

Q2. On a scale of 1 to 10 where "1" represents "not at all satisfied" and "10" represents "very satisfied," how satisfied are you with the overall level and quality of services and programs provided by The City of Calgary?

Q2 = [1-10], Refused = 99

Questionnaire – cont'd

BUY LOCAL

BL1. What does the term 'buy local' mean to you?
[INTERVIEWERS NOTE: IF RESPONDENT ASKS FOR MORE CLARIFICATION OF THE TERM 'BUY LOCAL,' DO NOT DEFINE IT. ANSWER "We are looking for your interpretation of the term."; IF ASKED, IT'S SPELLED "b-u-y"]

[OPEN END]

95. Response (specify): [RECORD VERBATIM]
98. Don't know / Unsure
99. Prefer not to answer

PROMPT: Is there anything else?

BL2. In the past six months, do you recall seeing, hearing, or reading any messaging or advertising with the phrase "Buy Local"?

1 Yes
2 No
8 Don't know

[IF YES AT BL2, ASK BL3_1 THRU BL3_3, ELSE SKIP TO BL4]
BL3_1. Where did you see, read, or hear this?

[INTERVIEWER NOTE: PLEASE ENSURE RESPONDENTS ARE TELLING YOU WHERE THEY HEARD ABOUT IT (E.G. TV, THE CITY'S WEBSITE, THE NEWS), **NOT WHAT.** THE NEXT QUESTION WILL ASK SPECIFICALLY ABOUT WHAT THEY HEARD/READ/SAW]

(DO NOT READ; IF RESPONDENT MENTIONS ONLINE, YOUTUBE, SOCIAL MEDIA OR NEWSPAPER/MAGAZINE, PROBE FOR RECALL OF SPECIFIC SITE/NAME – E.G. "Do you recall which YouTube/Facebook/Twitter/Instagram account you saw it on?")

1. The City's YouTube channel
2. The City's Facebook
3. The City's Twitter
4. The City's Instagram
5. The City's website/Calgary.ca
6. YouTube - general
7. Facebook – general
8. Twitter – general
9. Instagram – general
10. Online – general
11. StarMetro – newspaper
12. Avenue – magazine
13. Business in Calgary – magazine
14. Transit/bus shelters
15. Posters
16. TV
17. Radio
95. Other (please specify):

The City of Calgary 2020 Citizen Perspectives Survey – Wave 1 (Buy Local)
February 18, 2020

98. Don't know/don't remember (DO NOT READ)
99. Prefer not to answer (DO NOT READ)

BL3 What, specifically, have you seen, read or heard about "Buy Local"? **[INTERVIEWER NOTE:** NOW WE ARE LOOKING FOR THE CONTENT/MESSAGE OF WHAT THEY HEARD/READ/SAW (e.g. 'it's about improving Calgary's economy', 'helping local businesses', etc.) NOT WHERE THEY HEARD/READ/SAW IT].

[OPEN END]
95. Record Verbatim
98. Just heard the term, "Buy local" (DO NOT READ)
99. Don't know / prefer not to answer (DO NOT READ)

BL3_3. Which business or organization sponsored the Buy Local advertising or messaging you recall?

(DO NOT READ; ACCEPT MULTIPLE MENTIONS)
1 The City of Calgary
95 Other (please specify):
98 Don't know
99 Prefer not to answer

BL4. For the purpose of the next few questions, "buy local" refers to purchasing from locally-owned businesses instead of retail chains and non-locally owned service providers. Locally-owned businesses include those with headquarters in Calgary, franchises owned by Calgarians, and farmer's markets.
How important is it to you personally to buy local?

1 Very important
2 Somewhat important
3 Not very important
4 Not at all important
8 (DO NOT READ) Don't know

BL5. In your opinion, what – if any – are the benefits of buying local?

[OPEN END]
95. Record response (specify)
97. None – There are no benefits
98. Don't know / Unsure
99. Prefer not to answer

Questionnaire – cont'd

The City of Calgary 2020 Citizen Perspectives Survey – Wave 1 (Buy Local)
February 18, 2020

BL7. For each of the following, please tell me if you made all, most, some or none of your purchases in the past 6 months from a locally-owned business. The first one is [INSERT ITEM]. Did you make all, most, some or none of your purchases at a locally-owned business? And what about [INSERT NEXT ITEM]? (RE-READ DEFINITION OF LOCALLY-OWNED BUSINESS IF NEEDED AND RE-READ SCALE IF NEEDED).

(Locally-owned business definition: Locally-owned businesses include those with headquarters in Calgary, franchises owned by Calgarians, and farmer's markets.)

[RANDOMIZE]

BL7K. Groceries
BL7D. Alcohol
BL7E. Clothing
BL7F. Home décor items
BL7I. Services such as auto repair, home repair and maintenance, florists, and health and wellness
BL7L. Books
BL7M. Kitchen ware such as small appliances, dishes and utensils
[NEXT TWO TO FOLLOW IN ORDER]
BL7H. Coffee shops
BL7G. Dining out at restaurants

All
Most
Some
None
Didn't purchase (DO NOT READ; CHOOSE THIS OPTION AND SKIP TO NEXT ITEM IF RESPONDENT SAYS THEY HAVEN'T PURCHASED THE ITEM)
(DO NOT READ) Don't know

BL12. Thinking about all of your purchases in the past 6 months, when you had the option to buy online from a site such as Amazon, or to buy from a locally-owned business or store in Calgary, approximately what portion were purchased online from a non-locally owned business? Would you say all, most, some, or none of these purchases were made online from a site such as Amazon? (IF ASKED: BUYING FROM A LOCALLY-OWNED BUSINESSES INCLUDES ONLINE PURCHASES FROM A LOCALLY-OWNED STORE OR BUSINESS IN CALGARY) (IF NECESSARY: for example, purchasing books from Amazon instead of from a locally-owned bookstore).

1 All
2 Most
3 Some
4 None
98 (DO NOT READ) Don't know
99 (DO NOT READ) Prefer not to answer

The City of Calgary 2020 Citizen Perspectives Survey – Wave 1 (Buy Local)
February 18, 2020

BL8. Is there anything that prevents you from buying local more often? (PROBE FOR SPECIFICS)

[OPEN END]
98. Don't know / Unsure
99. Prefer not to answer

BL10. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. **[INTERVIEWER NOTE:** RE-READ SCALE IF NEEDED]

[RANDOMIZE]
A. I prefer to buy local whenever possible
B. Buying local can help the economy
C. I would pay a bit more to buy local
D. Buying local can help the environment
E. Buying local gives me access to better quality products
F. Buying from large retailers gives me access to a better variety of products than buying local does
G. It's important to me that I be able to purchase most or all items I need from one store.
H. If I want to buy local, I know where to go to find the items or services I need.
I. I know how to determine if a business is locally-owned.
J. Buying from locally-owned businesses tends to be more expensive than buying from large retail chains.
L. When we buy local, it creates jobs for Calgarians.

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
(DO NOT READ) Don't know

BL11. How much of your household shopping are you responsible for?

All
Most
Some
None
(DO NOT READ) Don't know

Calgary

Questionnaire – cont'd

Heritage Planning

Now we're going to move on to a different topic.

As you may know, The City's Heritage Planning team assists the conservation of historically-significant buildings and other sites in Calgary. This includes setting policy and providing financial incentives to heritage property owners in exchange for legal protection of the site. Unless a site is protected, it can be demolished or significantly altered regardless of heritage significance. Some examples of Calgary's heritage resources, including some that are not protected from demolition, are Knox United Church, the Deane House, and the Hudson's Bay Building.

(**IF ASKED**: Knox United Church is legally protected by the City of Calgary, and Province of Alberta.
The Deane House is not legally protected from demolition. It is registered with the Province of Alberta as a Historic Resource, but could be demolished after a 90-day notification period.
The Hudson's Bay Building is not legally protected from demolition.)

HP1. To what extent do you agree or disagree with the following statements:

(***IF NECESSARY:*** Would you say you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?)

(**IF NECESSARY:** THE CONSERVATION OF CALGARY'S HISTORIC BUILDINGS AND SITES MEANS LEGALLY PROTECTING HISTORICALLY SIGNIFICANT BUILDINGS AND SITES FROM DEMOLITION OR SIGNIFICANT ALTERATIONS)

[READ IN ORDER]
A. The conservation of Calgary's historic buildings and sites is important to <u>me personally</u>.
B. The conservation of Calgary's historic buildings and sites is important to <u>our city's culture</u>.
C. More should be done to conserve Calgary's historic buildings and sites for future generations to enjoy.

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree
Don't know **(DO NOT READ)**

DEMOGRAPHICS

And finally I have a few questions that will be used to help us classify responses.

DQ1. How many people, including yourself, live in your household?

RECORD NUMBER (RANGE 1 – 10)

[IF 2 OR MORE IN DQ1 ASK DQ2 AND DQ3, ELSE SKIP TO DQ4]
DQ2. Do you have any children under the age of 18 living in your household?

1 Yes
2 No
99 Refused

DQ3. Is there anyone aged 65 years or older living in your household?
[**PROGRAMMER:** PLEASE SKIP DQ3 FOR ANYONE WHO GAVE THE BIRTH YEARS BETWEEN 1900 TO 1954]
[**STATS:** PLEASE BACK CODE ANYONE WHO WAS BORN BETWEEN 1900 TO 1954 BACK INTO THIS QUESTION]
1 Yes
2 No
99 Refused

[ASK ALL]
DQ4. Are you either primarily or jointly responsible for paying property taxes or rent in your household?
(**INTERVIEWER NOTE:** If people are partially responsible for paying rent then select "Yes".)

1 Yes
2 No
99 Refused

DQ5. Do you own or rent your current place of residence?

2 Own
1 Rent
3 **(DO NOT READ)** Neither / Other (Please Specify)

DQ6. I am going to read you a list of different types of residential dwellings. Please tell me which of these best describes the type of dwelling you live in: (READ LIST)

1 Single detached house (**INTERVIEWER NOTE:** This includes bungalow, split level, 2-story, suite in a house, etc.)
2 Duplex, triplex, or fourplex
3 Townhouse or rowhouse

Questionnaire – cont'd

4 Apartment or apartment-style condominium
6 Another type of multi-unit complex (**INTERVIEWER NOTE:** This includes mobile home park, trailer park, seniors home, etc.)
95 (DO NOT READ) Other (Specify) ________________
99 (DO NOT READ) Refused

DQ19. How many years have you lived in Calgary? **(IF LESS THAN 1 YEAR ENTER 0)**
Enter number [ ]
99 Refused

[STAT: PLEASE CREATE A VARIABLE THAT CALCULATES THE PERCENTAGE OF LIFETIME SPENT IN CALGARY USING D19 AND AGE]

DQ8. We want to ensure our research is reflective of all Calgarians. Were you born in Canada?

1 Yes **[go to DQ10]**
2 No **[go to DQ9]**
99 Refused [go to DQ10]

[IF YES OR DK/REF, SKIP TO DQ10, ELSE CONTINUE WITH DQ9]

DQ9. How old were you when you arrived in Canada? **(READ LIST)**

1 Under the age of 12
2 12 to 17
4 18 to 59
5 60 or older
99 (DO NOT READ) Refused

DQ10. As you know, Canadians come from many different ethnic backgrounds. What is your **main** ethnic background? **(DO NOT READ LIST. ACCEPT UP TO 2 RESPONSES.) (PROBE TO CLARIFY ONLY IF NECESSARY)**
(IF NECESSARY: Ethnic background refers to where your family is from and is usually determined based on common ancestry or cultural origin).
1 Canadian/French Canadian
2 Caucasian/White
3 British (English/Scottish/Welsh/Irish)
4 Western European (from Austria, Belgium, France, Germany, Netherlands, or other)
5 Southern or Eastern European (from Greece, Italy, Portugal, Spain, Bosnia, Croatia, Serbia, Czech Republic, Hungary, Poland, Slovakia, Ukraine, former Soviet Republics, or other)
6 South Asian (Punjabi, Indian, Tamil, Sri Lankan, Pakistani, Bangladeshi, Nepalese)
7 East or Southeast Asian (from China, Hong Kong, Japan, North or South Korea, Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, or other)

8 West Asian or Middle Eastern (from Afghanistan, Iran, Iraq, Israel, Lebanon, Saudi Arabia, Syria, Turkey, or other)
9 African
10 Central/South American or Caribbean (from Argentina, Brazil, Columbia, El Salvador, Guatemala, Mexico, Venezuela, Barbados, Jamaica, or other)
11 Aboriginal/First Nations/Métis
95 Other (Specify)
99 Refused

DQ11. And what language do you speak most often at home? **(PROBE TO CLARIFY ONLY IF NECESSARY) (DO NOT READ LIST)**

1 English
2 French
3 Tagalog
4 Punjabi
5 Chinese (Interviewer note: some may report 'Chinese' without specifying further in the question on language spoken most often at home. These may include:
6 Mandarin
7 Cantonese
8 Hakka
9 Taiwanese
10 Chaochow
11 Fukien
12 Shanghainese
13 Spanish
14 Italian
15 Arabic
16 Hindi
17 Creoles
18 Bengali
19 Persian/Farsi
20 Urdu
21 Russian
22 Vietnamese
23 Korean
95 Other (specify)

[ASK DQ20 IF DQ11 NOT EQUAL TO ENGLISH OR DK/REFUSE; ELSE SKIP TO DQ12]
DQ20. Would it be helpful to you or someone in your household to get information from The City in a language other than English?

1 Yes
2 No
99 Refused

Questionnaire – cont'd

[ASK DQ21 IF YES TO DQ20]
DQ21. In what other languages would you like to receive information from The City? **(DO NOT READ LIST) [ACCEPT ALL RESPONSES]**

French
Spanish
Cantonese
Mandarin
Vietnamese
Tagalog
Punjabi
Urdu
Arabic
Other (Please specify)

DQ12. What is the highest level of schooling that you have obtained? **(READ LIST)**

1 Completed high school or less
2 Some post secondary or completed a college diploma
3 Completed university degree or post-grad degree
99 (DO NOT READ) Refused

DQ_EMP. What best describes your employment status? Would you say you are…
1 Employed full time
2 Employed part time
3 Self-employed
4 Out of work and looking for work
5 Out of work but not currently looking for work
6 A homemaker
7 A student
10 Retired
8 Unable to work
9 Other
99 (DO NOT READ) Refused

DQ13. Which of the following categories best describes the total annual income, before taxes, of all the members of your household? **(READ LIST)**

1 Less than $90,000
2 $90,000 and over
99 [DO NOT READ] Don't Know / Refused (SKIP TO DQ16)

[IF "Less than $90,000" ASK DQ14. IF "$90,000 and over" ASK DQ15. IF DK/REF, GO TO DQ16]

DQ14. Would that be… **(READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)**
1 Less than $30,000
2 $30,000 to just under $45,000
3 $45,000 to just under $60,000
4 $60,000 to just under $75,000
5 $75,000 to just under $90,000
99 (DO NOT READ) Refused

DQ15. Would that be… **(READ LIST – ACCEPT RESPONSES BEFORE FINISHING LIST)**
1 $90,000 to just under $105,000
2 $105,000 to just under $120,000
3 $120,000 to just under $135,000
4 $135,000 to just under $150,000
5 $150,000 and over
99 Refused

DQ16. Do you consider yourself a member of a visible minority?
1 Yes
2 No
99 Refused **[DO NOT READ]**

DQ17. Do you or a member of your family have a disability?
1 Yes
2 No
99 Refused **[DO NOT READ]**

DQ23. What is your gender?

IF NECESSARY - DO NOT READ EXCEPT TO CLARIFY: Gender refers to the gender that a person internally feels and/or the gender a person publicly expresses in their daily life, including at work, while shopping, or accessing other services, in their home or in the broader community.

DO NOT READ LIST EXCEPT TO CLARIFY
01 – Male
02 – Female
95 – Other – please specify
99 – Refused / prefer not to say

DQ18. Finally, would you be interested in participating in future research related to The City of Calgary?

Yes
No (SKIP TO CLOSE)
Don't know (SKIP TO CLOSE)

Questionnaire – cont'd

[IF "YES" ASK NEXT, ELSE SKIP TO CLOSE]

DQ18A. Could I please have an email address where we can contact you?

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT.]

DQ18B. Could I please have your first name and a telephone number you can be best reached at?

[RECORD FIRST NAME AND CONFIRM/CHANGE TELEPHONE NUMBER]

DQ18C. Is this phone number a cell phone or a landline?
1 Cell phone
2 Landline
99 Prefer not to answer

This completes the survey. Thank you very much for taking the time to provide feedback.