

Calgary



2019 Citizen Perspectives Survey Report Web & Digital

May 30, 2019

Prepared by:

The Corporate Research Team
Customer Service & Communications
The City of Calgary
Research@calgary.ca



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 an ongoing Citizen Perspectives Survey fielded at various intervals through the year. This wave of the Citizen Perspectives Survey focused on Calgarians’ use of web and digital options to find City information.

Methodology

The survey was conducted by NRG Research Group from April 8 – 15, 2019 with 500 Calgarians via telephone using random digit dialing (RDD). The survey was conducted using numbers from both landlines (65%) and cell phones (35%) to obtain a random and statistically representative sample of Calgarians. The survey averaged 10 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.

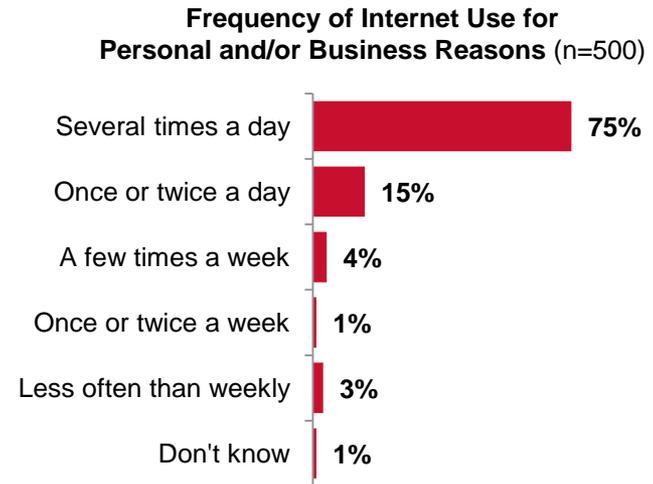
To ensure the data was gathered from a representative group of Calgarians, sample quotas were set by age, gender, and city quadrant of the general population aged 18 and older. Data were then weighted to the 2016 Civic Census for age and gender.



Key Findings

Frequent use of the Internet and having a smartphone are prevalent among Calgarians.

- Three-quarters (75%) of adult Calgarians use the Internet several times a day for personal and/or business reasons and another 15% use it once or twice a day.
- The vast majority (82%) of Calgarians have a smartphone, whether it's their own or was provided by their employer or someone else.
- Of those who use the Internet more often than once or twice a week and have a smartphone, most (86%) access the Internet using a smartphone on a regular basis, which translates to 70% of all adult Calgarians.



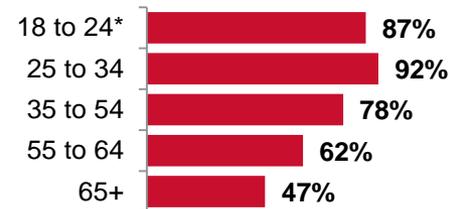


Key Findings

Frequent use of the Internet and having a smartphone are prevalent among Calgarians but differ somewhat by age.

- Compared to Calgarians under the age of 55, fewer Calgarians aged 55 years or older use the Internet for personal and/or business reasons several times a day.
- More Calgarians with a university degree than those with some post-secondary/a completed college diploma or those with a high school education or less use the Internet several times a day (84% vs. 72% and 62%, respectively).

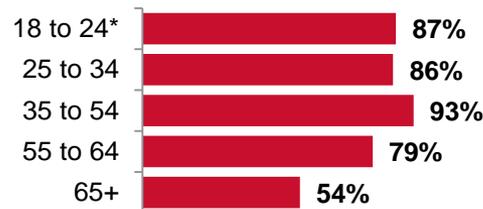
Use the Internet Several Times/Day – by Age



*Caution: small base size

- Far fewer seniors (aged 65 or older) have a smartphone (their own or one provided by an employer or someone else) than their younger counterparts.

Have a Smartphone – by Age



*Caution: small base size

- Calgarians with a university degree are more likely to have a smartphone (89% vs. 80% of those with some post-secondary or a completed college diploma and 72% of those with high school education or less).

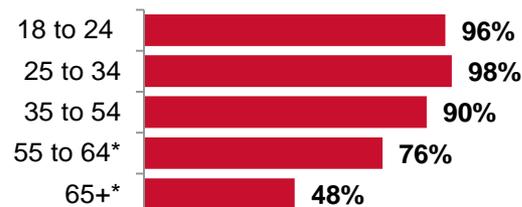


Key Findings

A majority of Calgarians use a smartphone to access the Internet on a regular basis although it is less common among those aged 55 years or older.

- Of those who use the Internet more often than once or twice a week and have a smartphone, most (86%) access the Internet using a smartphone on a regular basis, which translates to 70% of all adult Calgarians.
- Of those who use the Internet at least a few times per week and have a smartphone, using a smartphone to access the Internet on a regular basis is less prevalent among the older age groups.

**Access the Internet Using a Smartphone
on a Regular Basis – by Age**
(of those with a smartphone and use the Internet \geq a few times a week)



*Caution: small base size

- People with children under the age of 18 in their household are more likely than those who don't to use a smartphone to access the Internet on a regular basis (95% vs. 80%, respectively).

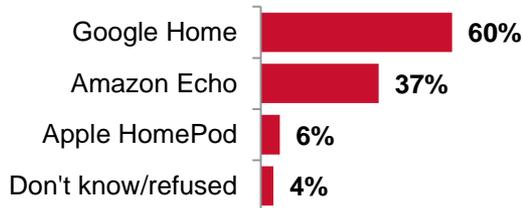


Key Findings

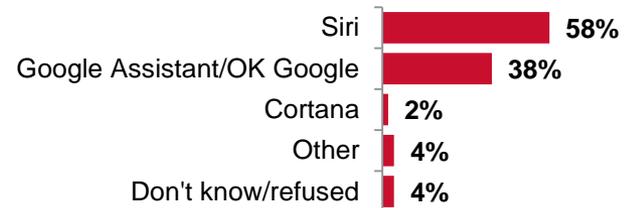
Voice activated devices and assistants are used regularly by a minority of Calgarians.

- Nearly as many Calgarians use a voice activated device (e.g. Google Home, Amazon Echo) as use a voice activated assistant (e.g. Siri, Google Assistant) regularly on a phone, tablet or computer (14% vs. 20%, respectively).
 - Among regular users of voice activated devices, Google Home is used by 60% and Amazon Echo by 37%. Apple HomePod is much less popular at 6%.
 - Of those who use regularly use a voice activated assistant, Siri is more popular than Google Assistant/OK Google with Siri being used by 58% and the Google version used by 38%.

**Types of Voice Activated Devices*
Used by Regular Users (n=72)**



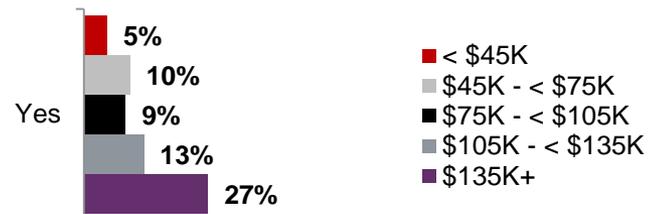
**Types of Voice Activated Assistants*
Used by Regular Users (n=99)**



*Multiple responses allowed

- Calgarians with household incomes of \$135K or more are more likely than others to use a voice activated device.
- Regular use of a voice activated assistant, however, is higher for those with household incomes of \$135K only in relation to Calgarians with household incomes of less than \$45K (26% vs. 12%, respectively).

Use a Voice Activated Device on a Regular Basis – by Income



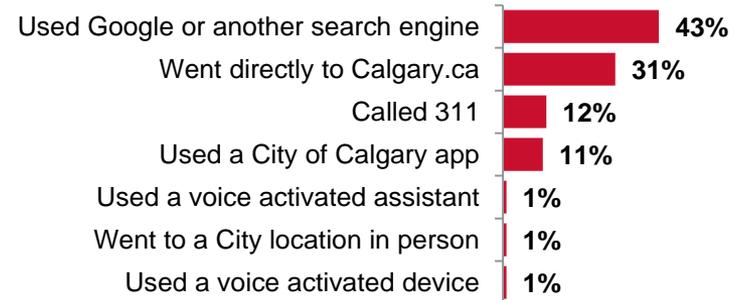


Key Findings

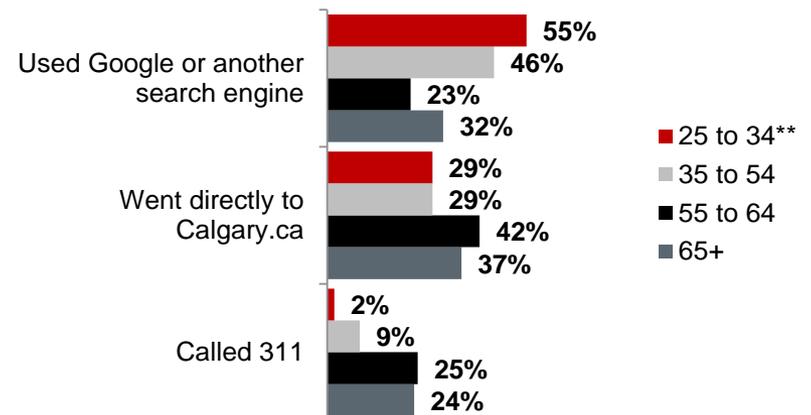
The majority of Calgarians who needed to find City information in the past six months relied on the Internet for their first attempt at finding it.

- Just over two-thirds (69%) of Calgarians have needed to find City of Calgary information in the past six months. When it came to looking for the information, 43% of these citizens first used Google or another search engine by manually typing their search request on a phone, tablet or computer and 31% searched directly on Calgary.ca.
- Those who didn't first use Calgary.ca to find the information were asked why they didn't look on Calgary.ca. The reasons given were:
 - They prefer to use or it's easier to use a search engine like Google (21%)
 - They simply didn't think of it (18%)
 - It wasn't convenient at the time (16%)
 - Didn't think they'd find the information on Calgary.ca (9%)
 - The site is difficult to use (9%)
 - Prefer to use an app (9%)
 - Would rather speak to a person on the phone (8%)
- Among Calgarians who looked for City information in the past six months, those aged 18 to 54 were more likely than those 55 or older to use Google or another search engine. Those 55 or older were more likely than others to call 311 to get the information. Age group differences in searching directly on Calgary.ca for the information were not statistically significant.

First Method Used to Look for City of Calgary Information (n=346)



First Method Used to Look for City of Calgary Information – by Age*



*Base size for 18 to 24 is too small to report
 **Caution: small base size

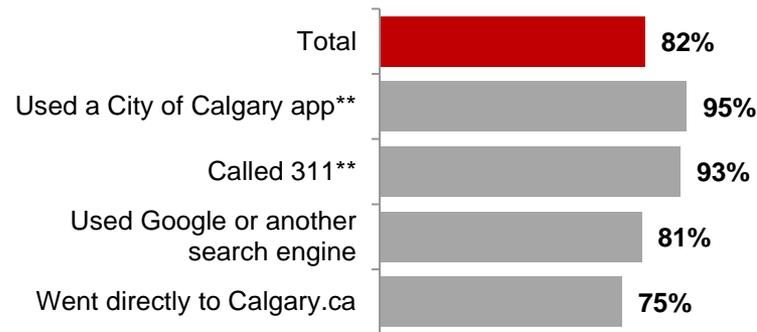


Key Findings

Success in finding City information on the first attempt looking for it is generally high although it differs slightly by method used.

- Most (82%) found the information they were looking for on their first attempt, although this masks differences in success rates by method used to look for the information.
 - Those who used a City app or called 311 were more likely than those who used Google/another search engine or Calgary.ca to find the information on their first attempt.

Found Information on First Attempt – Total and by Method Used* (n=346)



*Only methods with a base size over 25 are included

**Caution: small base size

- Of the 41 respondents who tried again to find the information (by calling 311, using Google or another search engine, searching directly on Calgary.ca or using another method), most (88%) were successful on their second attempt. In total, 92% of those who were looking for City information found it on either their first or second attempt.

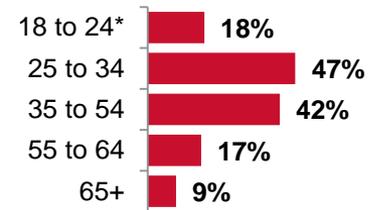


Key Findings

A majority of Calgarians have not used a mobile device to access a City service in the past year.

- A minority of Calgarians (31%) have attempted to access a City service using a mobile device such as a smartphone or tablet in the past year.
 - Compared to those aged 18 to 24 years and those 55 or older, 25 to 54 year olds are more likely to have attempted to access a City service using a mobile device.
- Of those who have used a mobile device to access a City service, animal services/licensing was the most common service type (24%).
- Among those who haven't tried to access a City service via a mobile device, the main reason given was that they haven't needed to access a City service (55%).
 - Some (14%) reported it's because they didn't have a mobile device to use and 12% reported it's because they prefer to use a computer (it has a bigger screen).

Attempted to Access a City of Calgary Service Using a Mobile Device in the Past Year – by Age



*Caution: small base size

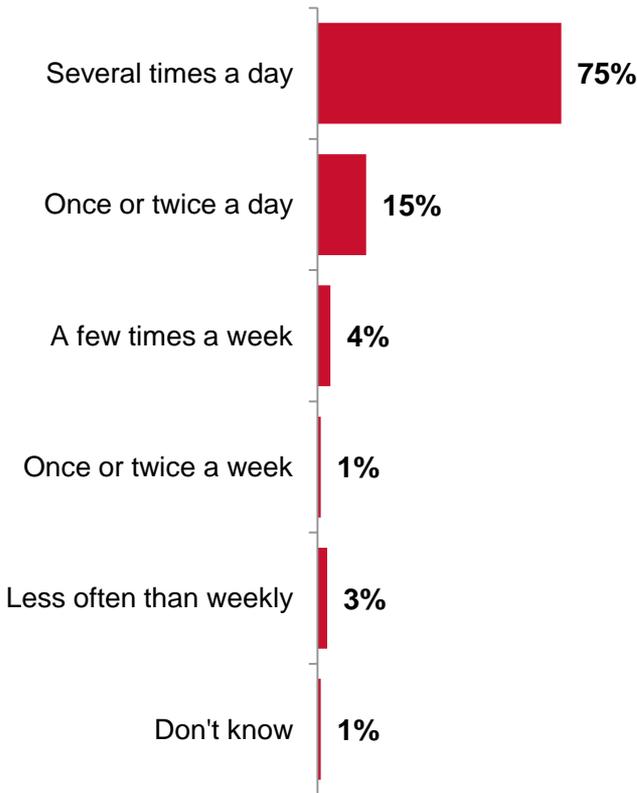
Detailed Findings





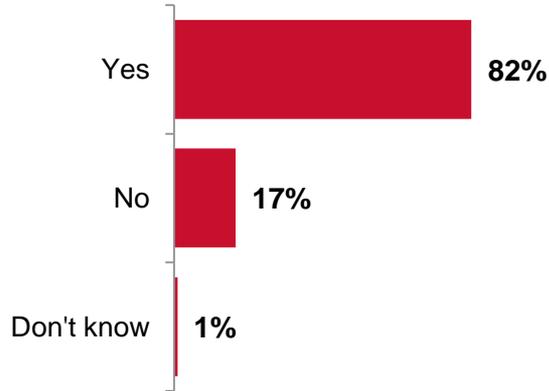
Internet and Smartphone Usage

Frequency of Internet Use



How often do you use the Internet for personal and/or business reasons? (n=500)

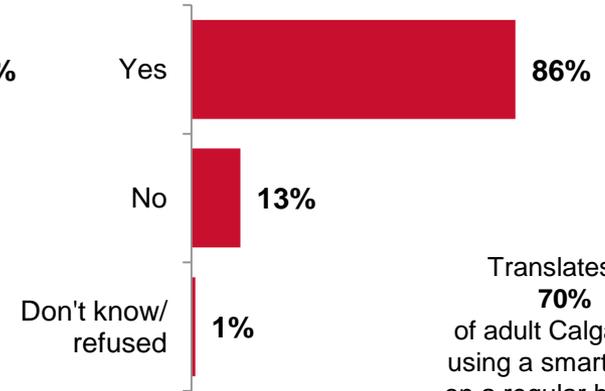
Have a Smartphone



Do you own a smartphone or have one provided to you by your employer or someone else? (n=500)

Use a Smartphone to Access Internet on a Regular Basis

(of those with a smartphone and who use the Internet at least a few times a week)



Do you use a smartphone for accessing the Internet on a regular basis?
Of respondents who have a smartphone and use the Internet at least a few times a week (n=408)

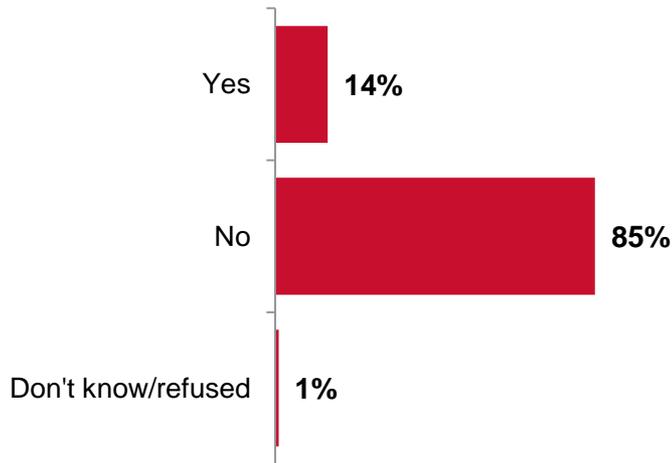
Translates to **70%** of adult Calgarians using a smartphone on a regular basis to access the Internet



Voice Activated Device Usage

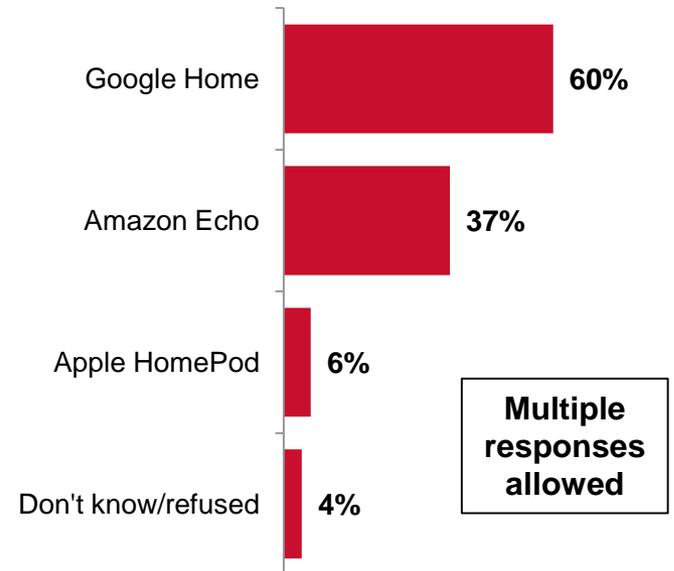
Use a Voice Activated Device on a Regular Basis

(e.g. Google Home, Amazon Echo, Apple HomePod)



Type(s) of Voice Activated Device

(of those who use a voice activated device on a regular basis)



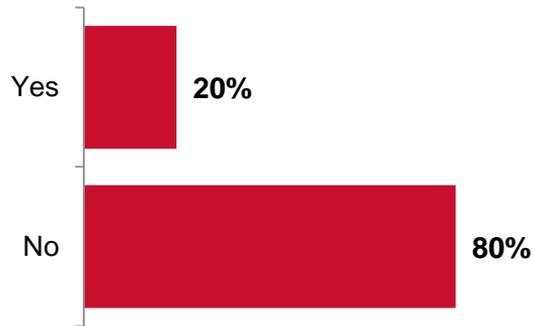
Do you use a voice activated device like Google Home, an Amazon Echo - sometimes referred to as Alexa - or an Apple HomePod on a regular basis? (n=500)

And which voice activated device do you use?
 (Note: This was an open-end question, meaning response options were not read to the respondent)
 Of respondents who use a voice activated device on a regular basis (n=72)

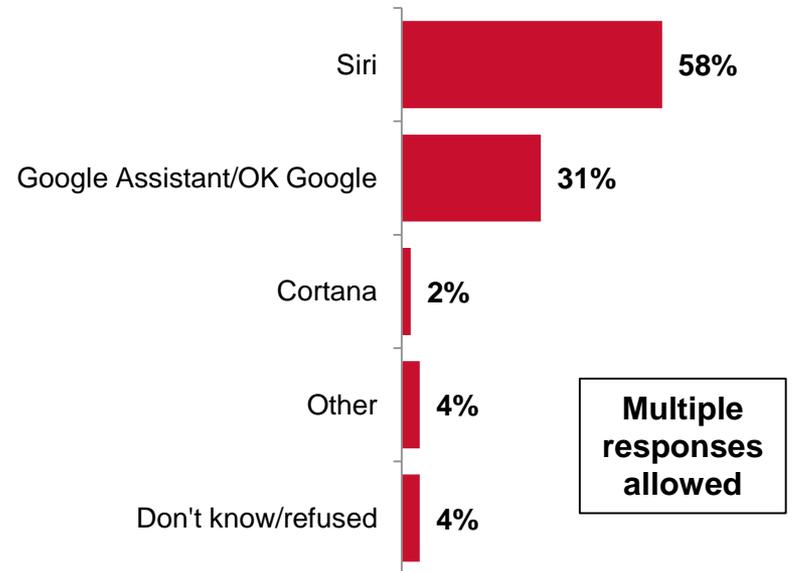


Voice Activated Assistant Usage

Use a Voice Activated Assistant on a Phone, Tablet or Computer on a Regular Basis (e.g. Siri or Google Assistant)



Type(s) of Voice Activated Assistant (of those who use a voice activated assistant on a regular basis)



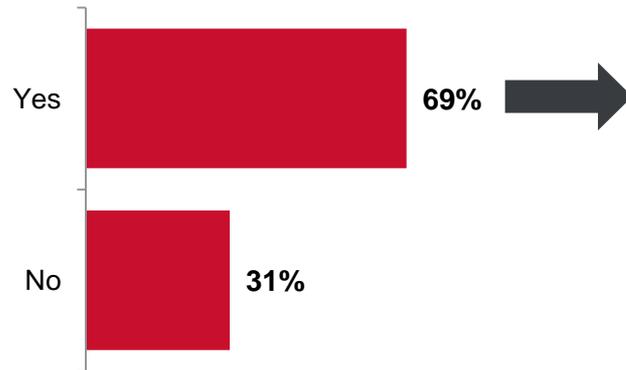
Do you use a voice activated assistant like Siri or Google Assistant on a phone, tablet, or computer on a regular basis? (n=500)

And which voice activated assistant do you use?
(Note: This was an open-end question, meaning response options were not read to the respondent)
Of respondents who use a voice activated assistant on a regular basis (n=99)

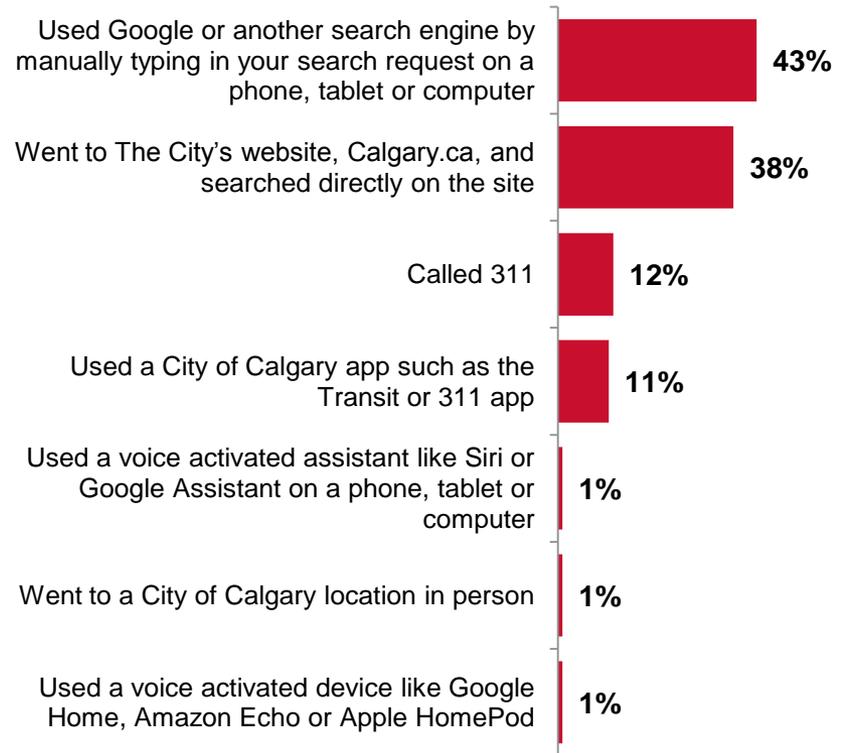


Searching for City of Calgary Information

Needed to Find City of Calgary Information in the Past Six Months



Method Used to Look for the Information (of those who needed to find City information in the past six months)



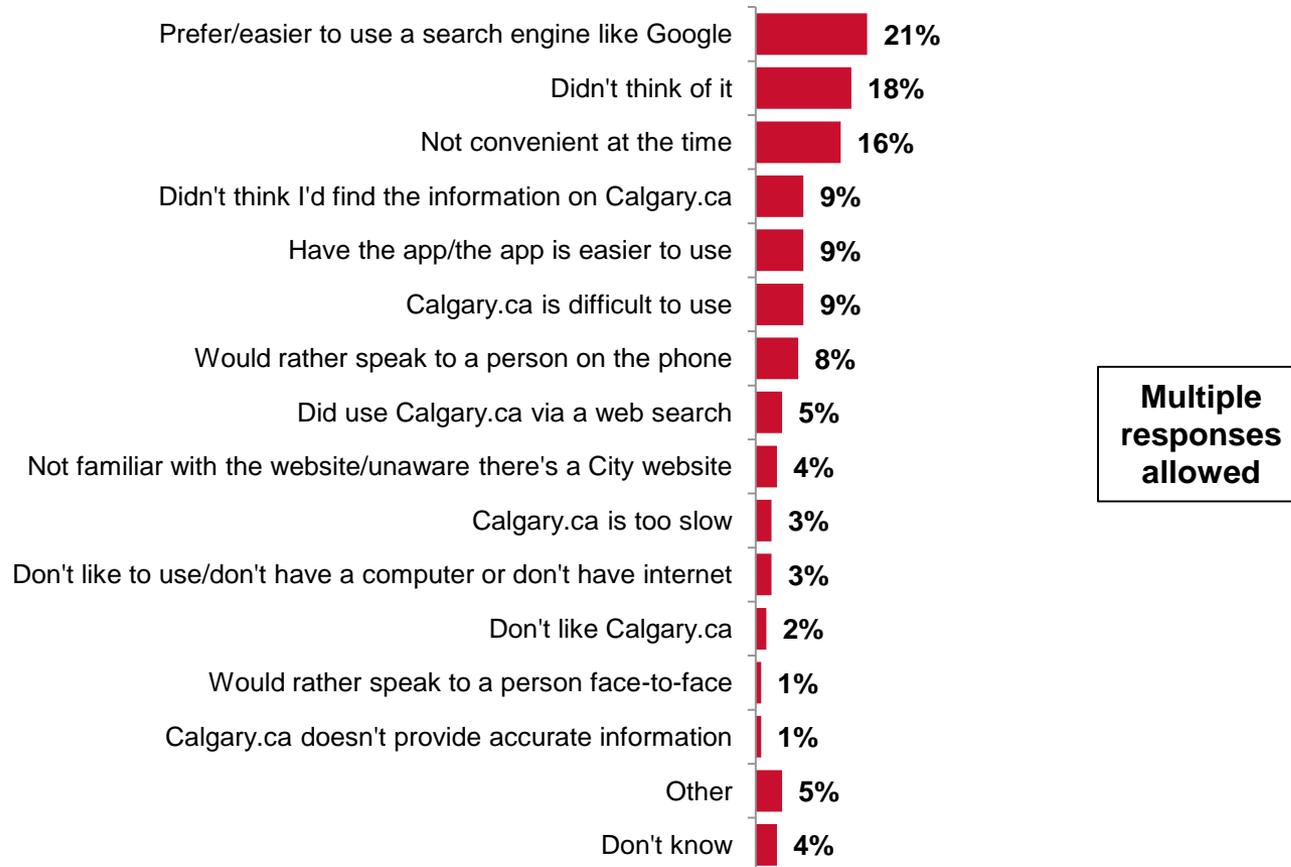
Have you needed to find any City of Calgary information in the past six months? (n=500)

Thinking back to the last time you needed to find City of Calgary information, how did you first attempt to find it?
Of respondents who needed to find City of Calgary information in the past six months (n=346)



Reasons for Not Using Calgary.ca

Reasons for Not Looking for the Information on Calgary.ca



Why didn't you first look for the information on Calgary.ca?

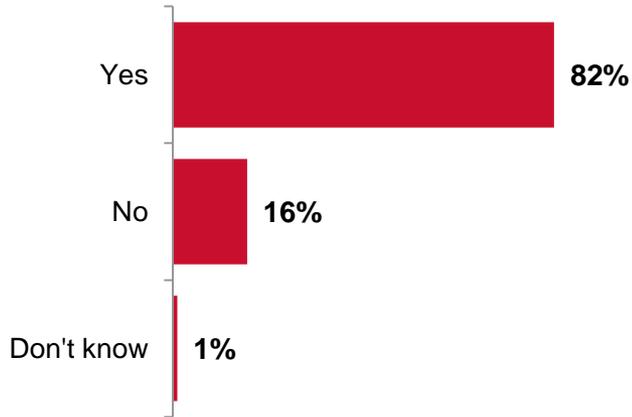
(Note: This is an open-end question, meaning response options were not read to the respondent)

Of respondents who didn't first look for the information by going directly to Calgary.ca (n=238)

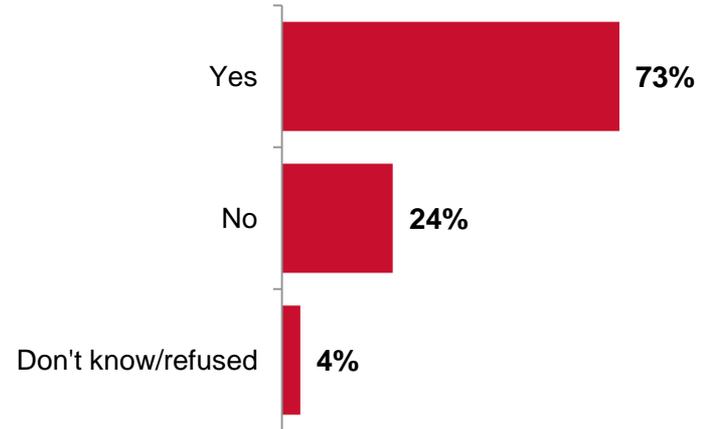


Finding City Information

Found City Information on First Attempt



Tried Another Way to Find the Information (of those who didn't find the information on their first attempt)



By Method Used*:

Used a City of Calgary app (n=37**)	95%
Called 311 (n=40**)	93%
Used Google or another search engine by manually typing in their search request (n=149)	81%
Went to The City's website, Calgary.ca, and searched directly on the site (n=108)	75%

*Only methods with a base size over 25 are included

**Caution: small base size

Did you find the City of Calgary information you were looking for on your first attempt?
Of respondents who have needed to find City of Calgary information in the past six months (n=346)

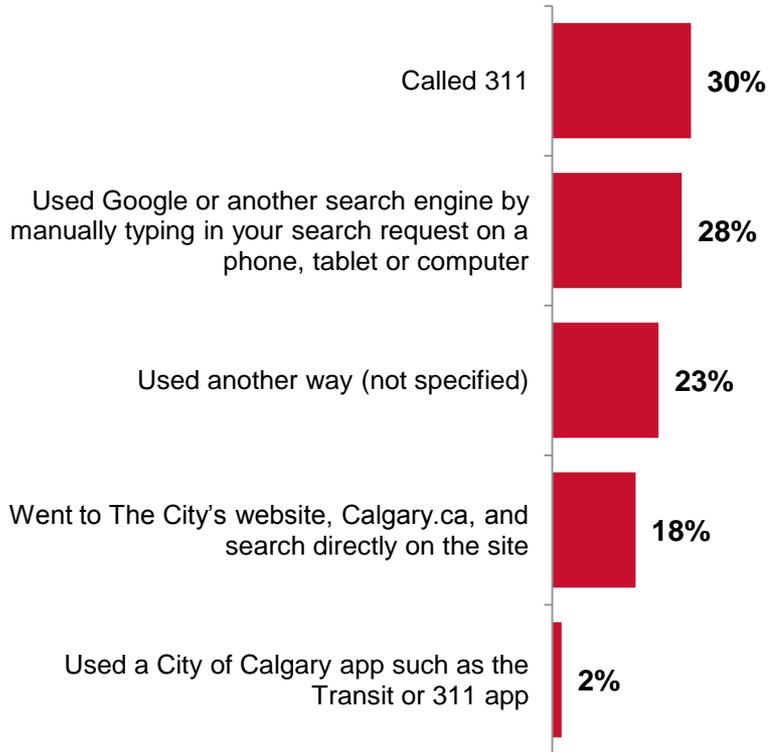
When you could not find the information you were looking for on your first attempt, did you try another way to find the information?
Of respondents who didn't find the information on their first attempt (n=57)



Second Attempt at Finding City Information

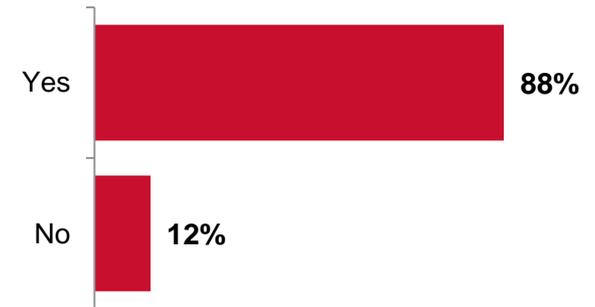
Second Method Used to Look for the Information*

(of those who didn't find the information on their first attempt and made a second attempt)



What other way did you attempt to find the information?
 Of respondents who didn't find the information on their first attempt and tried a second way to find it (n=41); *Caution: small base size

Found the Information on Second Attempt*

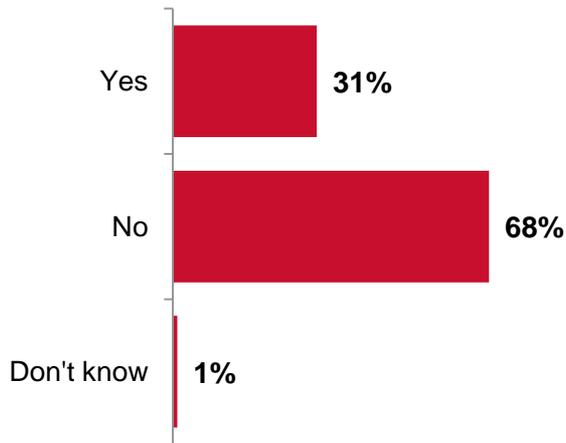


Did you find the City of Calgary information you were looking for on your second attempt?
 Of respondents who didn't find the information on their first attempt and tried a second way to find it (n=41); *Caution: small base size



Use of Mobile Device to Access City Services

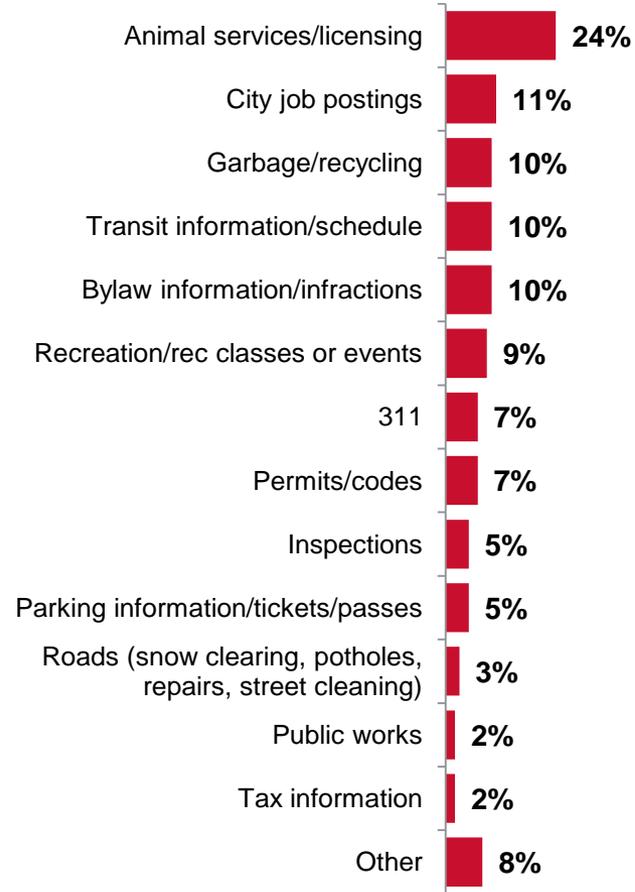
Attempted to Access a City Service Using a Mobile Device Such as a Smartphone or Tablet



In the past year, have you attempted to access a City service using a mobile device such as a smartphone or a tablet? (n=500)

Services Attempted to Access

(of those who attempted to access a City service using a mobile device such as a smartphone or a tablet in the past year)



Multiple responses allowed

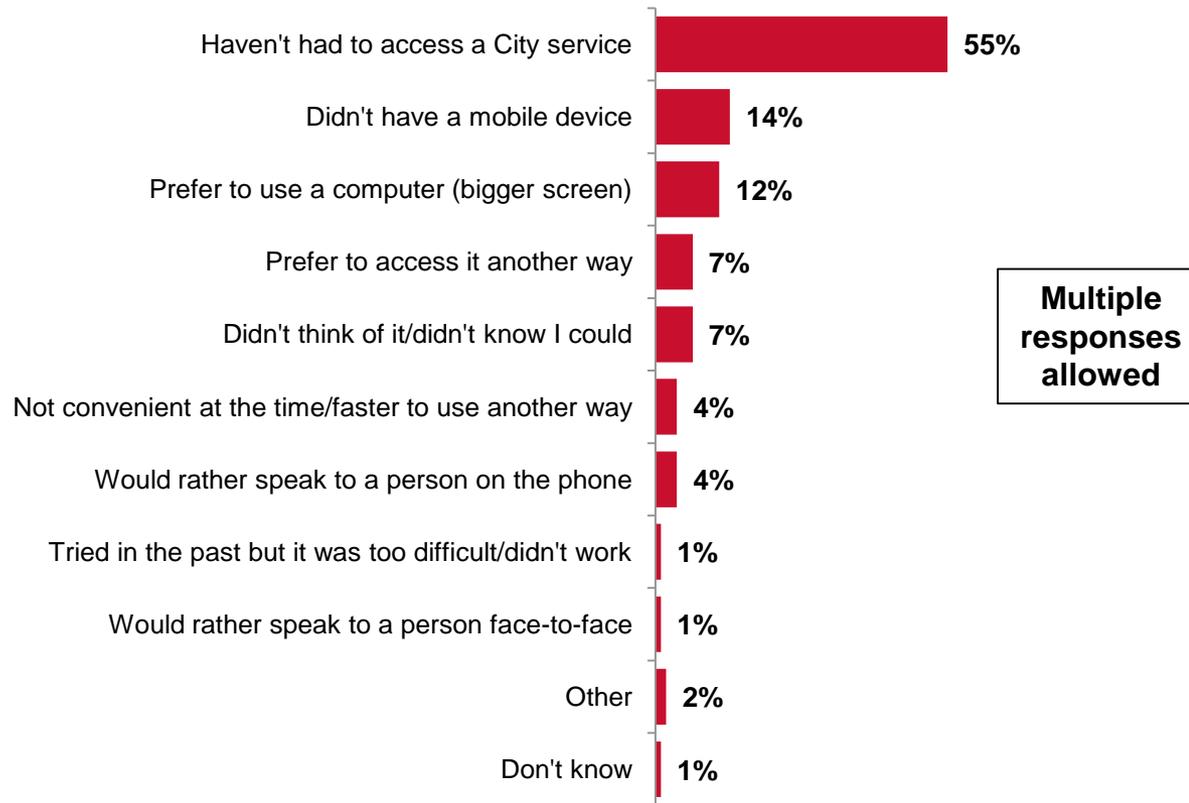
What service did you attempt to access?

Of respondents who attempted to access a City service using a mobile device such as a smartphone or a tablet in the past year (n=157)



Reasons for Not Using a Mobile Device to Access a City Service

Reasons for Not Using a Mobile Device to Access a City Service in the Past Year



Why haven't you attempted to access a City service using a mobile device in the past year?
 (Note: This is an open-end question, meaning response options were not read to the respondent)
 Of respondents who haven't attempted to access a City Service using a mobile device in the past year (n=339)

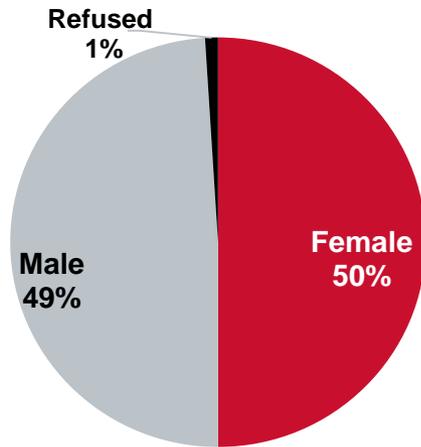
Demographics



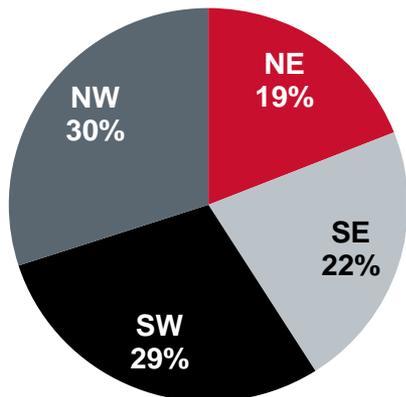


Demographics

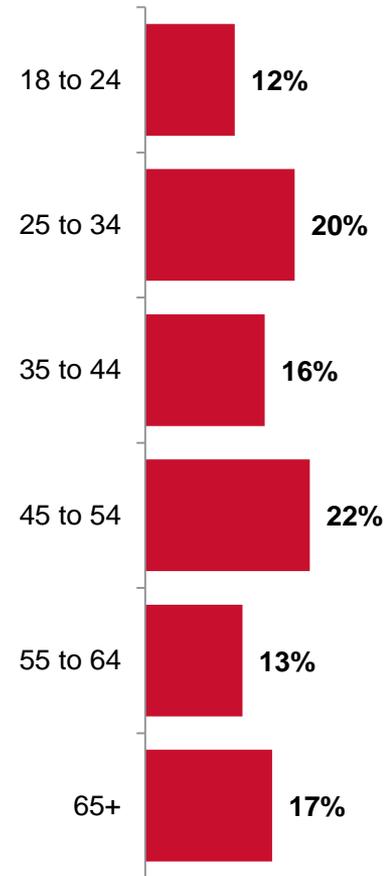
Gender
(asked, not inferred)



Quadrant of Residence



Age

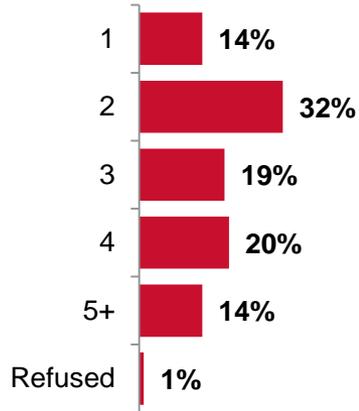


(n=500, unless otherwise specified)

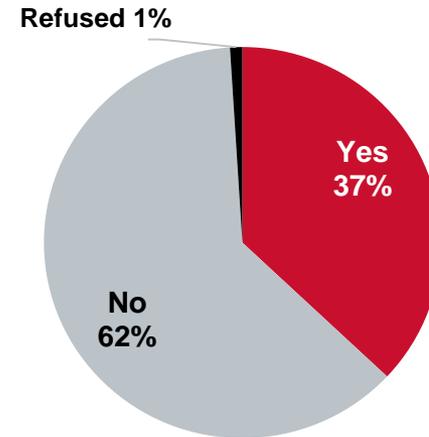


Demographics (cont'd)

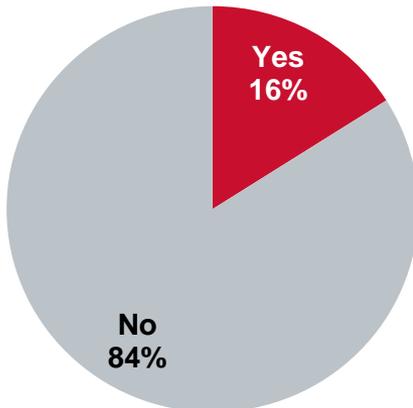
Household Size



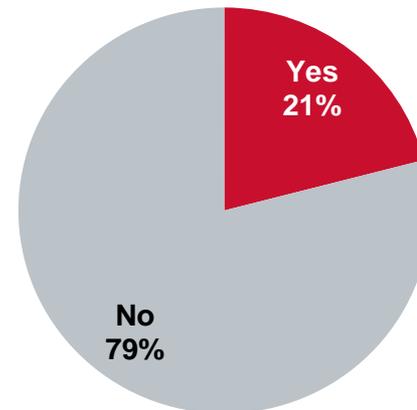
Children Under the Age of 18 in the Household



Self-reported Disability (Respondent or Family Member)



Senior (aged 65+ years) in the Household

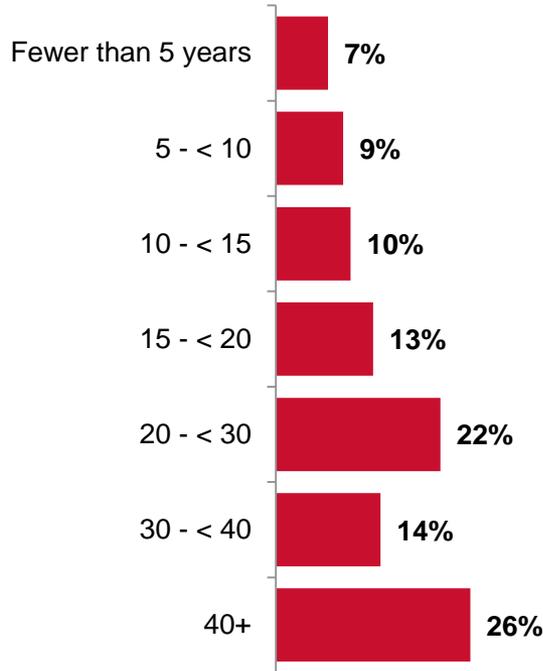


(n=500, unless otherwise specified)

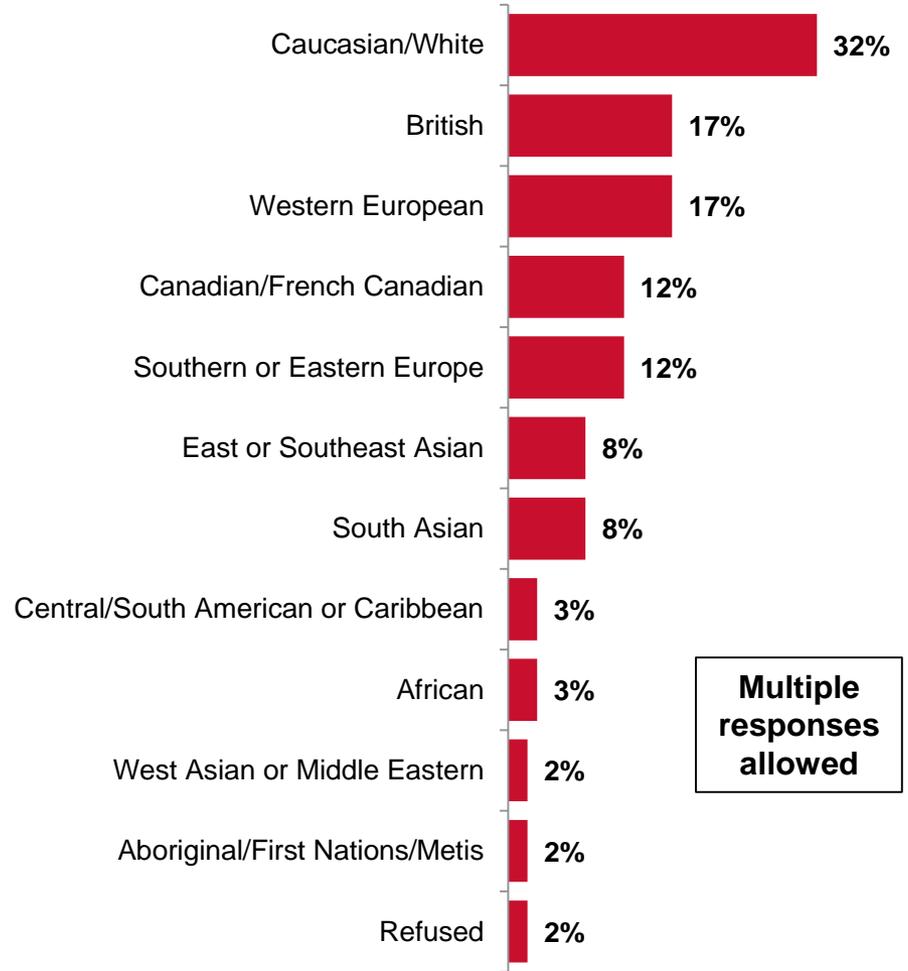


Demographics (cont'd)

Years Lived in Calgary



Main Ethnic Background

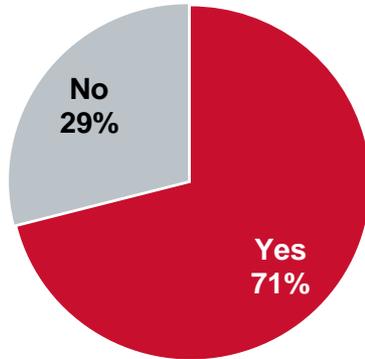


(n=500, unless otherwise specified)

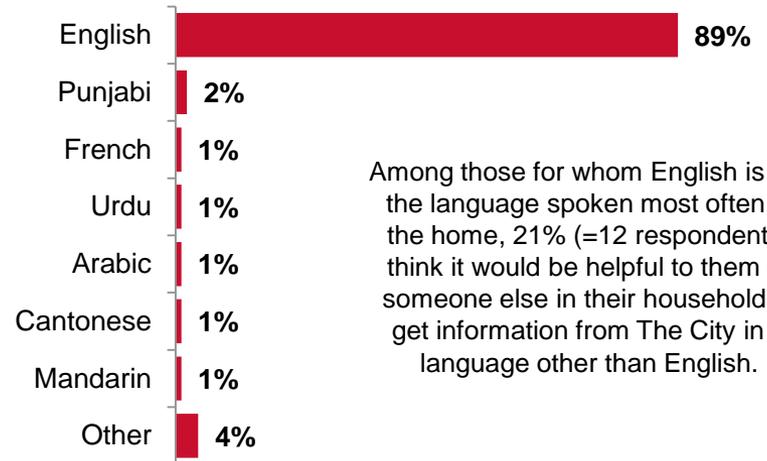


Demographics (cont'd)

Born in Canada



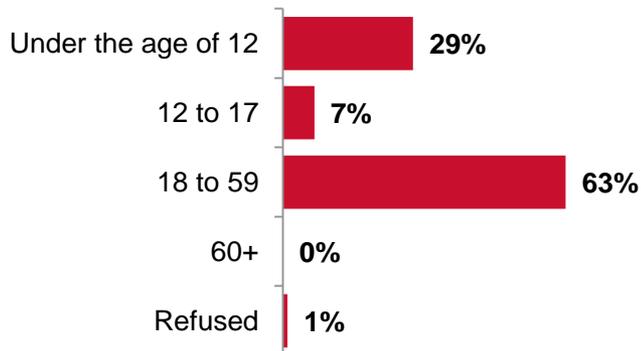
Language Spoken Most in the Home



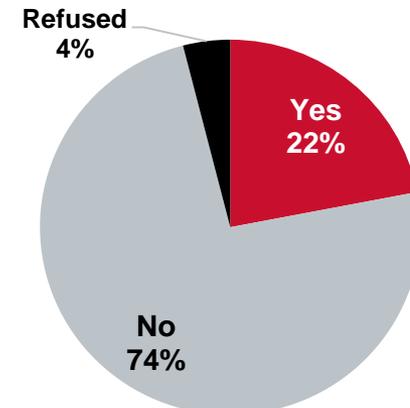
Among those for whom English is not the language spoken most often in the home, 21% (=12 respondents) think it would be helpful to them or someone else in their household to get information from The City in a language other than English.

Age Upon Arrival in Canada

(among those not born in Canada, n=143)



Self-Report as a Member of a Visible Minority

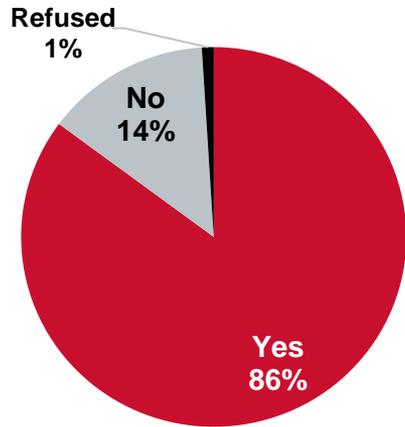


(n=500, unless otherwise specified)

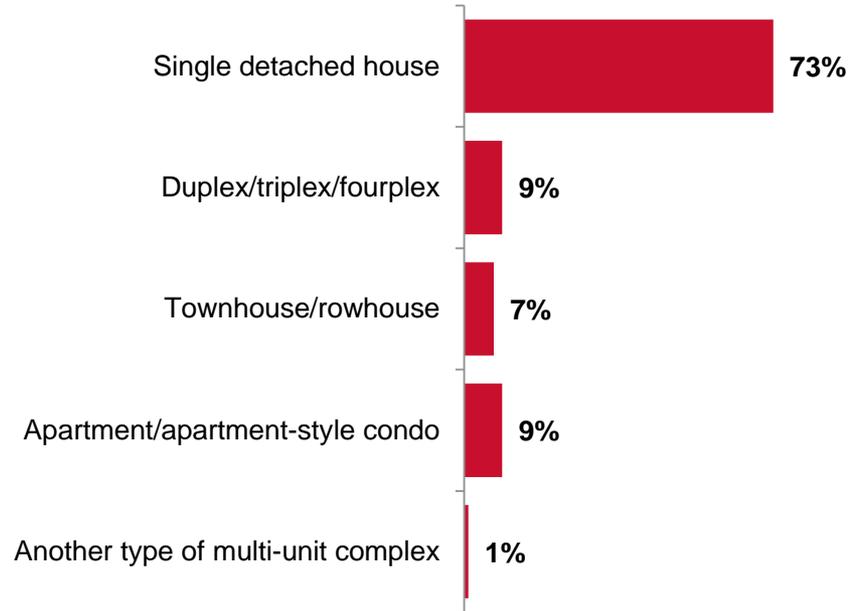


Demographics (cont'd)

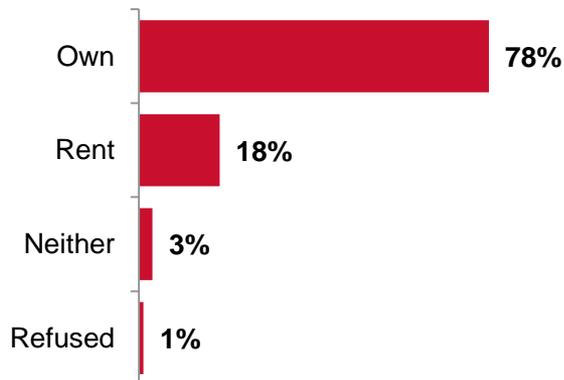
Primarily or Jointly Responsible for Paying Taxes or Rent in Household



Dwelling Type



Home Ownership

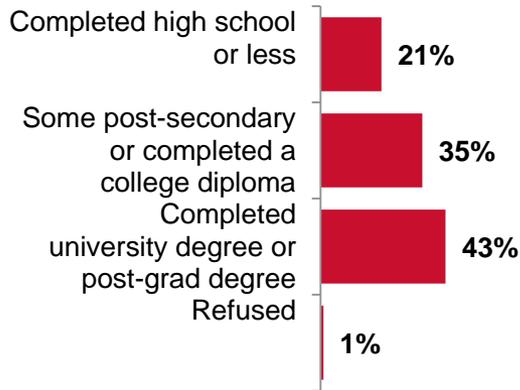


(n=500, unless otherwise specified)

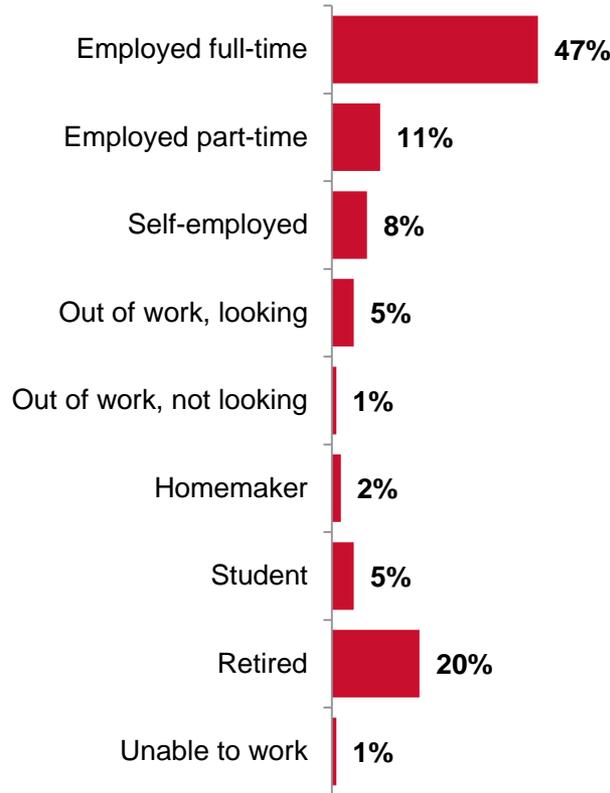


Demographics (cont'd)

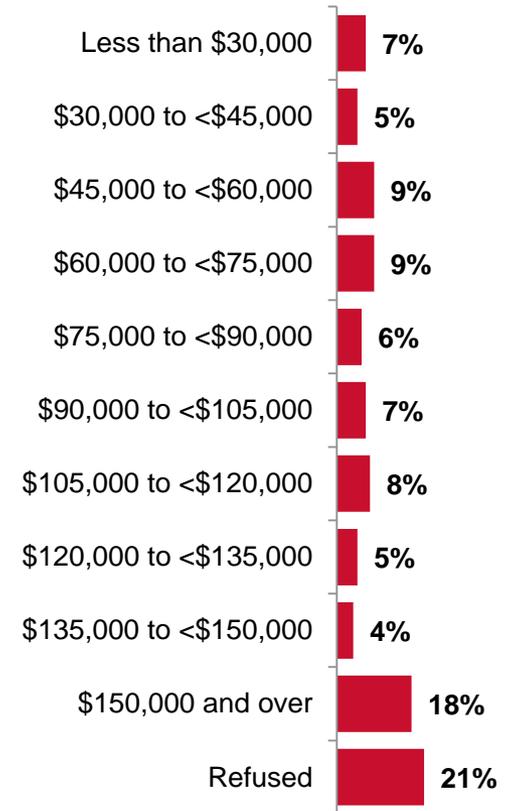
Highest Level of Schooling Obtained



Employment Status



Household Income



(n=500, unless otherwise specified)