

A photograph of three children playing in a splash pad. In the foreground, a young boy with dark hair is splashing water, his face and shirt are wet. Behind him, a girl in a blue and green swimsuit stands with her hands clasped. To the left, another boy in a black and yellow long-sleeved shirt watches. The background shows a clear blue sky and some greenery.

City of Saskatoon

2017 Leisure Guide Survey



Executive Summary

Executive Summary


In fall of 2017, the City of Saskatoon contracted Inshtrix Research Inc. to conduct a survey with the general population of residents living in Saskatoon and surrounding areas, Community Associations and various Advertisers to back the City's move to explore alternative options for the distribution of the primary communication tool used by the City to promote recreation and community development facilities – the Seasonal Leisure Guide. The results of this survey will help the City determine how residents and stakeholders feel about changing the status quo, and also what alternative distribution methods and format would be effective going forward.

- A multi-mode approach was used to contact 202 residents by telephone and 204 residents via the Inshtrix SaskWatch Research® online panel. Surveys were collected between November 2 and December 1, 2017. Out of a possible 827 residents contacted, 406 completed the survey, yielding an overall response rate of 49%.
- For the Stakeholder groups (Community Associations and Advertisers), Inshtrix interviewers conducted the survey by telephone with options to send the respondent a link to complete the survey online. Surveys were conducted between November 15 and December 7, 2017. Out of 48 Community Associations, 36 completed the survey (27 via telephone, 9 online) for a response rate of 75%. Out of 189 Advertisers, 66 completed the survey (48 via telephone, 18 online) for a response rate of 35%.

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Recreational Activity Information Sources:

The printed Leisure Guide is the main source of recreational information for Saskatoon residents.


57% 

of residents reference the printed Leisure Guide for information about recreational activities in Saskatoon.

However, **online methods are gaining popularity.**

- ✓ Thirty-eight percent (38%) of residents access the City of Saskatoon website, while one third (33%) also reference the online Leisure Guide.
- ✓ Social media is also gaining popularity as a source of information for leisure activities with about one quarter (28%) of the residents looking up recreational information online.
- ✓ Households with children below 18 years of age who are heavy users of the Leisure Guide (64% compared to 57% of the general population), also use the City of Saskatoon website (48% compared to 33%), the online version (39% compared to 33%) and social media (37% compared to 25%) to look up information about recreational activities.

Leisure Guide Distribution:

70% 

of residents report receiving the Leisure Guide via home mail delivery.

However, the proportion of residents who mention a printed copy was delivered to their homes has significantly decreased since 2007*.

- ✓ One quarter (25%) of residents reported picking up the Guide from other locations like a Leisure Centre, City Hall, etc., compared to only about 2% in 2007.
- ✓ Referencing the Guide online is also gaining popularity since 15% of residents mention looking up the Guide online as the most typical way of accessing the Guide.

**In 2017, the Fall Guide was delivered in August 2017, and the survey was conducted in October/November 2017. In 2007, the Spring/Summer Guide was delivered in March 2007, and the survey was conducted in May/June 2007.*

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Leisure Guide Distribution Preference

Saskatoon residents are also becoming more open to the idea of discontinuing the distribution of the Leisure Guide to every household.

13% 

of residents would no longer look at the Leisure Guide or other City programs if the Leisure Guide was no longer distributed to their homes. As expected, baby boomers are more likely to fall into this group.

- ✓ This is further supported by the fact that 70% of residents support having limited print distribution of Leisure Guides available for pick up at City of Saskatoon leisure facilities and library locations, and about 40% oppose the idea of keeping the distribution of the Guide as is.
- ✓ When specifically asked how they would get a copy if the printed Guide were no longer distributed to every household, 51% of residents stated they would go online to look for information. A similar proportion (46%) of residents would also pick up the Guide from a City of Saskatoon location if they need to reference a printed Guide.
- ✓ Although households with children under 18 use and prefer the printed Guide, 90% of households will still look at the Leisure Guide and City programs if home delivery was discontinued.

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Current Leisure Guide Usage

Most Important Sections of the Leisure Guide

An overwhelming majority of Saskatoon residents consider the seasonal information section (84%) and the admission rates and hours of operation section (82%) of the seasonal Leisure Guide as important.

About one quarter of Saskatoon residents consider the Advertiser section and the Community Association section of the Guide to be very important, although a high proportion of residents consider these sections to be somewhat important to them.

As expected, households with children younger than 18 rate the Community Association section, Advertiser section and Red Cross Swim Lesson sections of the Guide as important sections.


Similar to usage, various sections of the Leisure Guide are least important to baby boomers.

Perceived Value of the Leisure Guide

Base: All respondents n=406

The proportion of residents who consider the Leisure Guide valuable (Very Valuable+ Somewhat Valuable):

68% 
Printed

64% 
Online

62% of residents look through the Guide and keep it for reference each season. This number increases to 73% among households with children below 18 years.



Interestingly, value for the Leisure Guide, irrespective of whether it is printed or online, is high among households with children younger than 18 (80% printed, 77% online value).

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Format in which the current Leisure Guide is accessed

The printed Guide is accessed more compared to the online Guide, especially for sections like programs advertised by other local organizations, adult or youth programs offered by the City, Community Association programs and Red Cross swim lessons. Interesting to note, roughly one third of residents who find a particular section of the Leisure Guide important access the section in both print and online format. However, Saskatoon residents are slowly looking beyond the printed Guide for leisure information.

- ✓ A slightly higher proportion of residents use the online version to find admission rates and hours of operation for Leisure Centres.
- ✓ Not surprisingly, usage of the online version is more prevalent among millennials, compared to their older counterparts.

Format	 Print	 Online	Both	Neither
Seasonal information for City of Saskatoon facilities	33%	26%	36%	5%
Admission rates and hours of operation for City Leisure Centres	28%	31%	38%	4%
Drop-in programs schedules	32%	27%	35%	6%
Programs advertised by other local organizations	38%	16%	36%	10%
Adult or youth programs offered by the City	45%	13%	33%	10%
Community Association programs	43%	15%	31%	12%
Red Cross Swim lessons	45%	13%	31%	12%

Base: All respondents who rate each section of the Leisure Guide as very or somewhat important.

What would make Saskatoon residents use the online Leisure Guide more?

Gen-Xers and families with children younger than 18 mention they would use the online Guide more often if they were made more aware of it or if the online interface was more user friendly. Many gen-Xers also suggest doing UX testing with Saskatoon residents before launching an online interface to make sure it meets resident needs.*

Awareness of the online Guide is an issue that is further reflected in the fact that 32% of Saskatoon residents have never referenced the online Guide (compared to 8% for printed Guide). Eight percent (8%) of residents are unsure of the value of the online Guide, compared to only 2% for printed Guide.

*UX testing is a technique used in user-centred interaction design to evaluate a product by testing it on users.

Executive Summary **Future Preferred Format**

% Support (Strongly + Somewhat)

76%



Keep the format as is

74%



Condensed printed version with more details online

44%



Support having only online Leisure Guide

Base: All Saskatoon residents (n=406)

Saskatoon residents are not fully prepared to do away with the printed Leisure Guide, altogether. This is further supported by the fact that less than one half of Saskatoon residents (44%) supported the idea of having the Guide available ONLY online.

Although a high proportion (76%) of residents support keeping the format as is, a condensed version with more details online is also well received by residents (74%).

- Current behaviour of Saskatoon residents also supports the fact that this format change will be well accepted by Saskatoon residents. Currently, after receiving the printed Guide, 62% keep it for reference. However, 40% of these residents also go online to look for further information. Again, this proportion is higher among households with children below 18 years old (60%).

Reaction of residents to...

Condensed Community Association section

When asked about the impact on households if the Community Association section of the Leisure Guide no longer included a detailed listing of programs, 11% of households mention it will have a lot of impact on them since the Guide is a place in which they have a comprehensive list of programs, as well as reference to the programs of other Community Associations. However, 44% mention it will have no impact on their households. Most mention they search the information online or through social media anyway.

No Advertiser Section in the Leisure Guide

Similar sentiments are expressed for the Advertiser section as well, with 10% saying they will be highly impacted, while 49% of residents say removal of this section will have no impact on them. Even among heavy users of the Guide (households with children less than 18 years old), 37% mentioned they will not be impacted if the advertiser section is removed. Most mention that if the Advertiser section is no longer in the Leisure Guide, they will search the information online on Google, go to the organization's website or social media or rely on word of mouth for program information from local organizations.

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Stakeholder perspective on changes to the format and distribution of the Leisure Guide

Community Associations

- ✓ Currently, Community Associations rely mainly on traditional print sources, such as newsletters and the Leisure Guide, to promote programming and find these sources very effective. Online sources, such as websites and social media, are also emerging and social media is gradually emerging to be an effective channel to promote programming for Community Associations (90% of the Community Associations find social media effective).
- ✓ Community Associations find advertising in the Leisure Guide effective primarily because they get to target a wider audience, especially residents who do not live in the community. However, most Community Associations acknowledge the detailed information listed in the Leisure Guide is not very up to date since they have to submit the information far in advance, which results in the information listed in the Guide not being very current, and they have to inform residents about the updated information over phone or email.

Base: All Community Associations n=36.

97% 

Find the Guide very or somewhat effective

94% 

Promote programs through the Leisure Guide

Advertisers

- ✓ Though all responding Advertisers promote through the Leisure Guide, online sources, such as websites and social media (along with word of mouth), are viewed as comparatively more effective than advertising in the Leisure Guide.
- ✓ The Leisure Guide is effective for Advertisers due to its broad reach, and the Guide is usually where Saskatoon residents look for activities. However, many mentioned the ad space is expensive, and since fewer urban or younger demographic groups reference the Guide, it makes the advertisements in the Guide less effective compared to promoting their programs online.

Base: All Advertisers n=66.

100% 

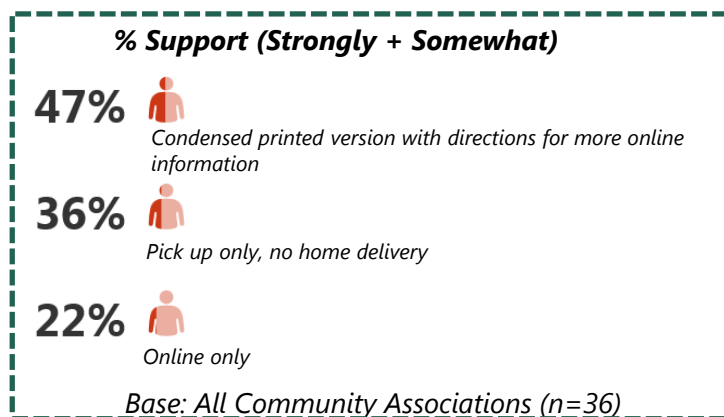
Promote programs through the Leisure Guide

89% 

Find the Guide very or somewhat effective

Executive Summary

Support for future proposed format or distribution changes – Community Associations



- ✓ Similar to residents, Community Associations are also not ready to do away with the printed Guide altogether and have the Leisure Guide only available online.
- ✓ Support is relatively low for a reduced distribution since Community Associations feel it will reach fewer residents and decrease the effectiveness of their section in the Guide.

- ✓ Community Associations are divided when asked if they support or oppose the suggested future format change of having a condensed Community Association section in the Leisure Guide that features general information about each Community Association, including name, brief description, website/social media address and where to go to find more information on programs. About one half support the concept, while the other half oppose it.

The main reasons stated for supporting this format change are:

- ✓ Will make coordination with the City much easier
- ✓ Will force Community Associations to improve their websites and social media presence (a few suggested that the money saved by the City as a result of not having to print the Community Association detailed section could be given to the associations to develop their online presence)
- ✓ Will make the information more current since it does not have to be submitted far in advance

Community Associations who oppose this format change are:

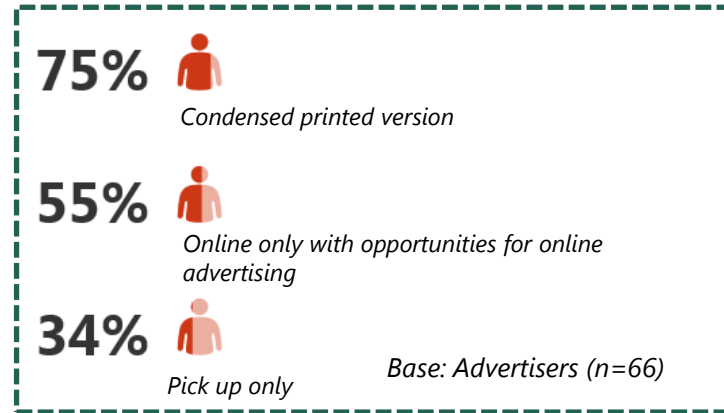
- ✓ Primarily concerned that not everyone has online access and having a detailed program list drives their registration
- ✓ Reach is another reason stated by Community Associations who mention that they will be impacted if their programs are not listed in the Guide.

Social media, websites and newsletters will be the sources Community Associations will revert to if they lose the opportunity to advertise in the Guide.

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Likelihood to continue advertising in the Leisure Guide with the proposed format and distribution changes - Advertisers

% Likely to Continue Advertising (Very Likely + Likely)



Discontinuation of the ad section of the Leisure Guide will have some impact on Advertisers. Twenty-four percent (24%) of Advertisers will be impacted greatly since they will not reach their target market. The impact is more for companies with ad spend of less than \$1,000.

- ✓ Similar to Community Associations, a lower proportion (34%) of Advertisers support the proposed distribution change of no longer distributing the Leisure Guide to Saskatoon and area households, instead having it available for pick up at City of Saskatoon leisure facilities and library locations. Advertisers feel the reach of their ads will be affected as fewer residents will get the Guide.
- ✓ The majority (75%) of the Advertisers support having a condensed Advertiser section that includes ad listings versus formatted ads. Over one half (58%) of these Advertisers believe that with this format, the effectiveness of their ads will either remain the same or increase.
- ✓ However, unlike residents and Community Associations, a higher proportion of Advertisers (55%) support the concept of the Leisure Guide being available only online.

Key Takeaways

- ✓ Saskatoon residents are gradually becoming open to the idea of not distributing the seasonal Leisure Guide to every household since keeping the Leisure Guide distribution the same is opposed by close to 4 in 10 Saskatoon residents. Seventy percent (70%) of residents support the idea of having limited print distribution of the Guide available for pick up at City of Saskatoon leisure facilities and library locations. Support for this distribution change is low among Community Associations and Advertisers, mainly because they feel it will reach fewer people. However, the research shows behaviour of Saskatoon residents is changing. About one quarter pick up the Guide from other locations, compared to 2% in 2007. If they do not receive the Guide in their mail, 50% will still look up information online while a similar proportion will pick it up from other locations.
- ✓ Although the printed Leisure Guide is the main source of information for Saskatoon residents, increasing proportions are going online to find information. Awareness of the online Guide is low among Saskatoon residents, which is further demonstrated by the fact that about one third of residents have never used the online Guide. Baby boomers are least likely to use the online version of the Guide, but the findings show they are not heavy users of the Leisure Guide. Although households with children younger than 18 use and prefer the printed Guide, 9 out of 10 households will still look at the Leisure Guide and City programs if the printed Guide is not available or if home delivery is discontinued.
- ✓ Gen-Xers express a need for more awareness of the online version of the Guide and for a user-friendly interface, which in turn will make them use the online Guide more. The City of Saskatoon should promote the online Leisure Guide through various channels like social media and also make sure the online interface is user friendly. Other suggestions for improvement to the online version include:

More updated accurate information

Create an app or a more mobile-friendly site

Send reminders/notifications

Allow printable pages

- ✓ The City of Saskatoon is on the right track for recently launching a user-friendly registration interface. User experience (UX) testing is recommended before an ideal, customizable online Guide is launched.
- ✓ That being said, Saskatoon residents are not yet ready to do away with the printed Guide, altogether. The most supported concept is, "Reduce the number of pages in the printed Leisure Guide, with more detailed information available online". The printed Leisure Guide is often a trigger for residents to go online to look for more information, with social media gradually emerging as a place to look for recreational opportunities. The City can support Community Associations to explore other avenues of reaching residents so Community Association sections of the Guide can be condensed.