THE DOWNTOWN RESIDENTS SURVEY

downtown WINNIPEG BIZ

In collaboration with
the Institute of Urban Studies,
University of Winnipeg

INSTITUTE OF URBAN STUDIES
UNIVERSITY OF WINNIPEG

ABOUT THE INSTITUTE OF URBAN STUDIES

Founded in 1969 by the University of Winnipeg, the **Institute of Urban Studies** (IUS) was created at a time when the city's "urban university" recognized a need to address the problems and concerns of the inner city. From the outset, IUS has been both an educational and an applied research centre. The Institute has remained committed to examining urban development issues in a broad, non-partisan context and has never lost sight of the demands of applied research aimed at practical, often novel, solutions to urban problems and issues.

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ABOUT THE DOWNTOWN WINNIPEG BIZ

The Downtown Winnipeg Business Improvement Zone (BIZ) represents 1,400 businesses in the district and runs programs targeting downtown image, cleanliness, safety, transportation and parking. The Downtown BIZ hosts events and promotes downtown as a great place to work, shop, live and enjoy. Programs include the Downtown Watch safety ambassadors, Easy Streets™ Blue Loonie loyalty program to save on transportation, and the Out to Lunch summer concert series, among many others.

The BIZ also advocates for downtown revitalization and enhanced services on behalf of its members.

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EXECUTIVE SUMMARY

What did the survey comprise of?

The Downtown Residents Survey was completed by 1583 respondents and was intended to gather information regarding the habits and perceptions of downtown residents.

The survey consisted of nine sections, including downtown dining, downtown shopping, downtown entertainment, perceptions of downtown, familiarity with downtown initiatives, and demographic information.

Who completed the survey?

One quarter of respondents lived downtown, and the majority (71%) worked downtown. 61% were female, and 37% were between the ages of 35-49. Roughly half of respondents were married, had at least one child, and earned $60,000 or more per year. 71% had a university or college education.

Downtown residents tended to be younger than the average respondent, with just over 40% between the ages of 25-34. They were slightly more likely to be male, and much less likely to be married or have children. Only 34% earned over $60,000 (34%), but 74% had a university or college education. 12% of downtown residents had moved to Winnipeg from another country.

Key Findings

- While perceptions of safety are improving, many still consider the downtown to be unsafe, particularly at night.
- The responses of downtown residents expressed a need for more options for shopping in the downtown, and particularly grocery shopping.
- Few living outside of the downtown shop there in the evenings or on weekends, showing a reluctance to return downtown outside of work hours unless for a major event.
- Awareness of various downtown events and BIZ programs was quite high, while attendance/participation in these events and programs was significantly lower.
- More work is needed to reinforce the growing perception that the downtown is safe, as well as to provide a wider range of products and services, both for downtown residents as well as those who live outside of the downtown.

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1.0 INTRODUCTION

1.1 Survey Construction and Methodology

The survey was constructed by the Downtown Winnipeg Biz, and was distributed in January of 2010. The survey was distributed entirely online; subjects were recruited though emails sent to members of the biz's mailing list. The purpose of the survey was to determine the behaviours and needs of Winnipeg residents and, where possible, to distinguish market groups based on residence proximity to downtown.

The survey was constructed with nine separate sections. They were:

Location of Residence:

Respondents were shown a map of downtown consistent with the City of Winnipeg's designation of the downtown area. Residents were asked where they lived, and given four options: *downtown*, *near downtown*, *suburbs*, or *out of town*. Residents were also asked for their postal code, which was used to generate Figure 2 (number of respondents by first three characters of postal code).

Downtown Residents:

This section was only asked of those respondents who indicated they lived downtown. Questions included whether the residents rented or owned their home, how long they had lived downtown, and reasons for living downtown.

Downtown Dining:

All respondents were asked questions related to dining in the downtown area, including how often they purchased meals in downtown establishments, how much they spent on various meals downtown, and types of restaurants or cuisine they would like to see more of downtown.

Downtown Shopping:

All respondents were asked several questions relating to shopping habits. Questions addressed topics such as products and services accessed, malls or shopping areas most frequently accessed, and which services or shops respondents would like to see more of downtown.

Downtown Entertainment:

All respondents were asked questions related to activities or performances attended in the downtown area. Questions included the number of visits to various downtown attractions, and a comparison of movie theatres attended downtown vs. outside of downtown.

Perceptions of Downtown:

All respondents were asked questions relating to their perceptions of downtown, including perceptions of safety.

Downtown Initiatives:

All respondents were asked questions relating to their familiarity with various programs and events available in the downtown area.

Demographics:

This section asked respondents a variety of demographic questions, including how they typically learn about what is going on in the downtown, as well as most frequent mode of transportation and location of workplace.

Prize Entry:

At the conclusion of the survey, respondents were able to enter their information for a chance to win a 42" LCD TV.

The Institute of Urban Studies, University of Winnipeg (IUS) worked with BIZ staff to examine the survey results. IUS staff then processed the data using survey software to complete the analysis. Following the initial review of the data, a number of variables were then cross tabulated to examine the results in greater detail.

2.0 RESULTS

2.1 Profile of Respondents

Location of Residence

As noted in section 1.1, respondents were shown a map of downtown Winnipeg and were asked to indicate where they lived. 25% of the sample lived ***downtown***, 32% lived ***near downtown***, 37% lived in the ***suburbs***, and 7% lived ***out of town*** (Figure 1).

Due to the small number of respondents who lived "out of town", this group was combined with those who identified themselves as living in the "suburbs".

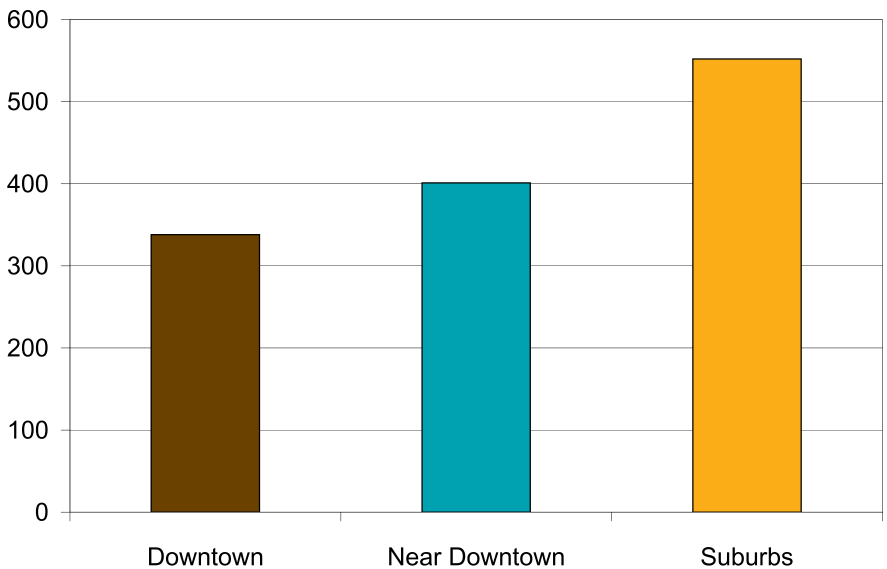


Figure 1: Composition of sample by area of residence (Table 1)

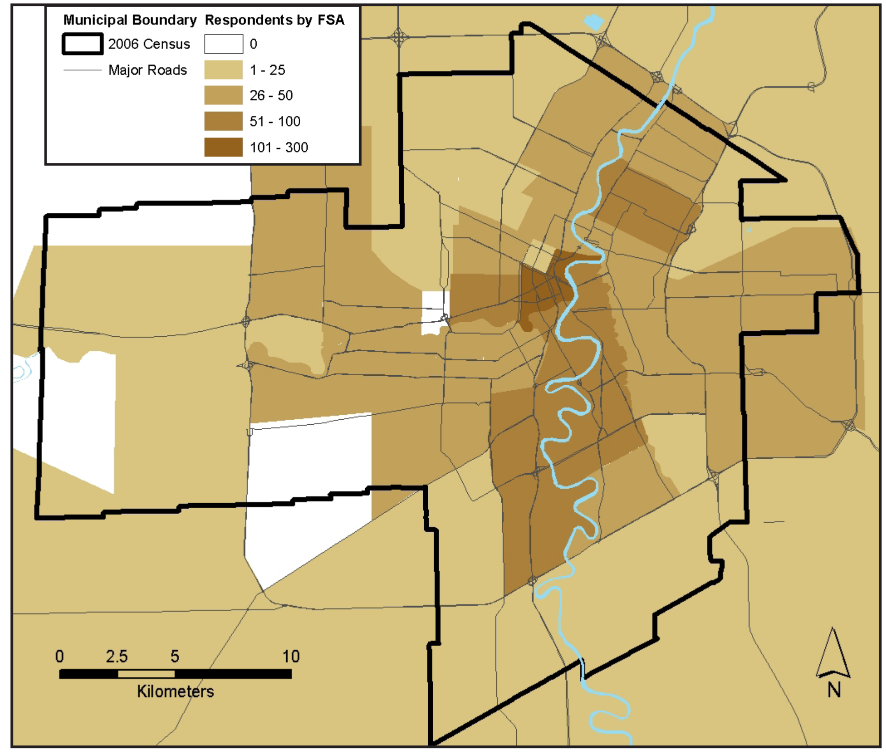


Figure 2: Number of respondents by first three characters of postal code

Gender

Demographically, the sample population was 61% ***female*** and 39% ***male.*** This proportion was not constant across the four home areas. Respondents from the suburbs and from near downtown were slightly more likely to be female than downtown residents.

Age

The largest proportion of respondents (37%) was between the ages of ***35-49 years***. 26% of respondents were between the ages of ***50 and 64 years***, and 26% were within ***25 to 34 years*** of age (Figure 4). Roughly 8% were under the age of 24, and 3% were ***65 and older***.

The largest proportion of downtown residents was between ***25 and 34 years*** (41%), followed by ***35-49 years*** (30%). 9% of downtown residents were between ***18-24 years***, and only 3% were ***65 and older***.

Marital Status

On average, 55% of all respondents were ***married*** or in a ***common-law relationship***. 45% were ***single*** or ***living alone*** (Figure 5).

The percentage of respondents who were ***married or common-law*** increased the further the respondents lived from downtown. 35% of downtown residents were ***married or common-law***, compared to 52% of those who lived near downtown, and 70% of those who lived in the suburbs.

Downtown Residents were **younger** and were more likely to be **single** than those living outside of downtown

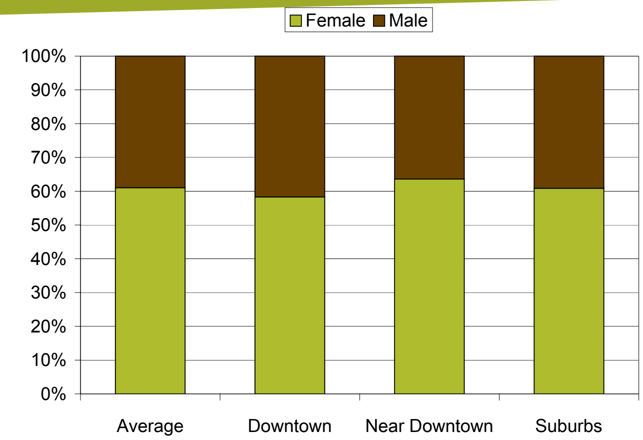


Figure 3: Gender split of respondents (Table 2)

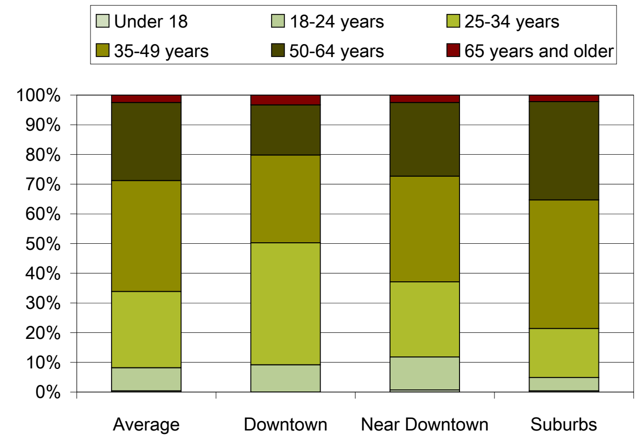


Figure 4: Age of respondents by home area (Table 3)

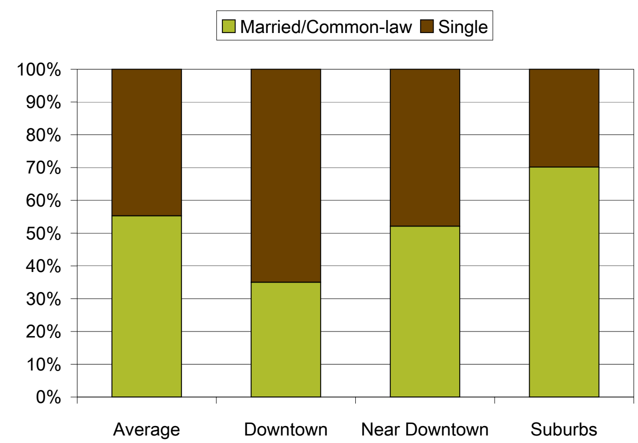


Figure 5: Marital status of respondents by home area (Table 4)

Income

The majority of respondents (51%) reported an annual household income of ***$60,000 and over***. 11% made ***$50,000 to $60,000*** annually, while just 4% made ***$10,000 or less*** (Figure 6).

The percentage of respondents with an annual household income of ***$60,000 and over*** increased the further away from downtown that respondents lived. Roughly 62% of downtown residents earned a household income of more than $30,000 per year, with 22% earning between ***$10,000 and $29,999***, and 29% earning between ***$30,000-$49,999***. 22% of downtown residents earned ***$75,000 and over***, compared to 28% of those living near downtown, and 53% of those living in the suburbs.

Education

Respondents were asked to indicate the highest level of school they had obtained. 58% of respondents selected ***university/college***, 14% selected ***high school***, and 8% selected ***technical/vocational school*** (Figure 7).

The proportion of respondents who selected ***university/college*** was largest for downtown residents (64%), and smallest for those living in the suburbs (55%). The proportion of respondents who selected ***technical/vocational school*** was largest for those from the suburbs (10%), and smallest for downtown residents (7%).

Fewer downtown residents reported earning over ***$60,000 annually*** compared to those living in the suburbs

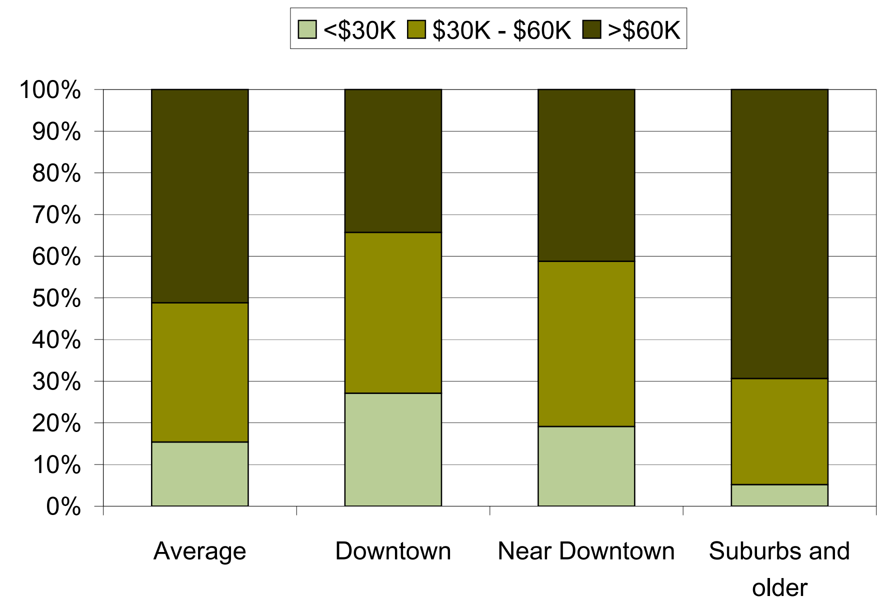


Figure 6: Income of respondents by home area (Table 5)

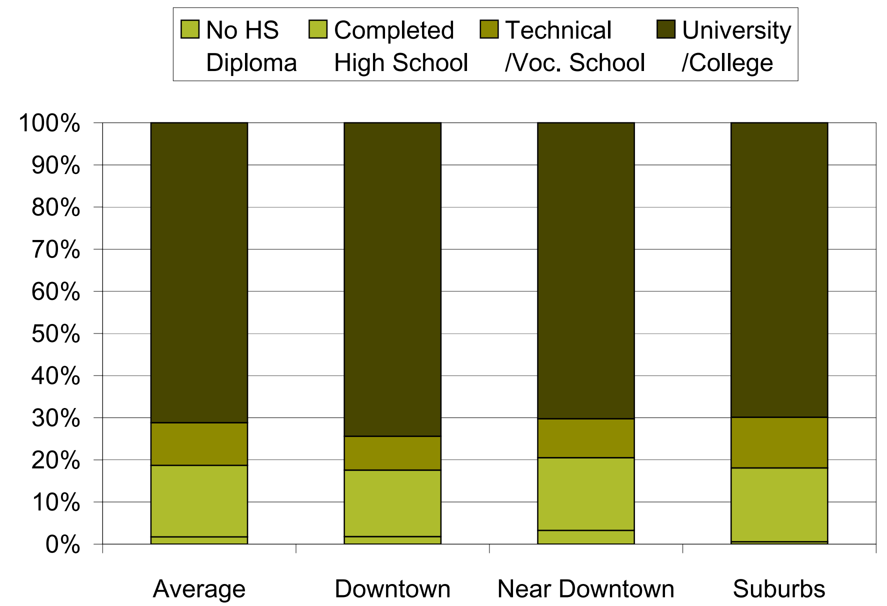


Figure 7: Education level of respondents (Table 6)

Profession

Of all respondents, the largest proportion (20%) selected ***government*** as their occupation, followed by ***professional*** (19%) and ***administration*** (14%). The smallest proportion of respondents chose ***artist/musician/writer*** (1%), ***social services*** (2%), and ***law*** (2%) as their occupation (Figure 8).

Downtown residents were represented more than average in the fields of ***education/research***, ***study***, ***medicine*** and ***law.*** Downtown residents had a significantly lower than average representation in the fields of ***administration*** and ***management***.

Two interesting trends of note were the following: a ring of employment of ***artists/musicians/writers*** and ***social services workers*** was observed in the near downtown area that was significantly higher than in either the downtown or suburban areas. Also, there was significantly lower than expected employment of ***professionals*** in the near downtown area.

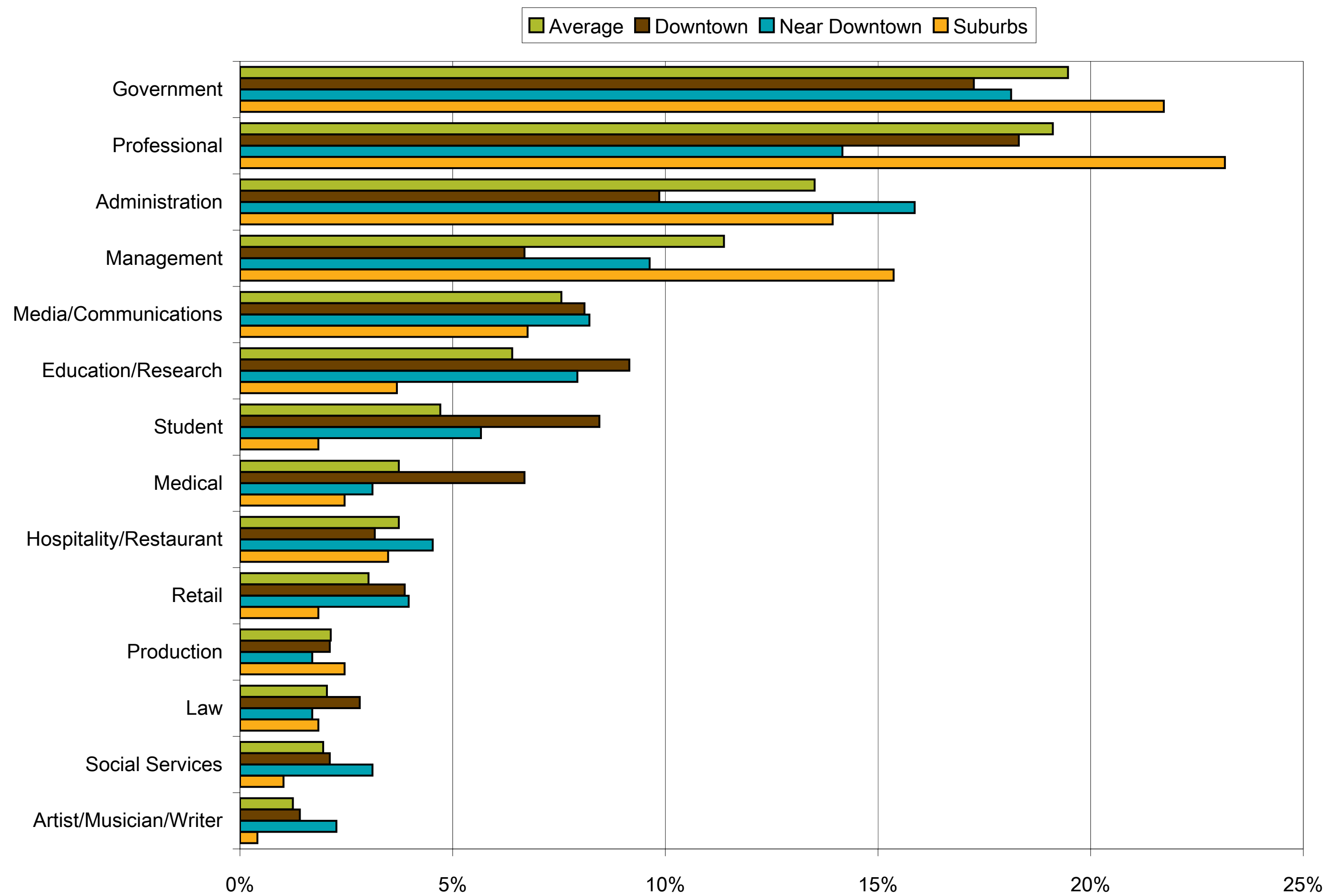


Figure 8: Profession of respondents (Table 7)

Children

On average there was an even split (50%/50%) between respondents with children and those without. Downtown residents were much less likely (25%) to ***have children*** than the average, while suburbanites were much more likely to have children (68%) (Figure 9). Of all respondents with children, 47% had ***two childre***n, 29% had ***one child*** and 18% had ***three children*** (Figure 10).

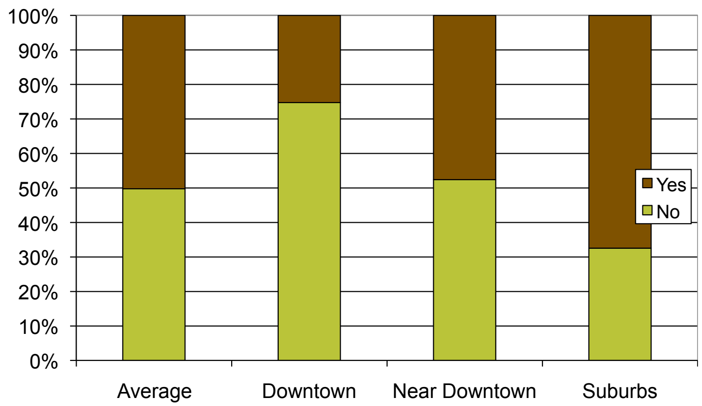


Figure 9: Presence of children by home area (Table 8)

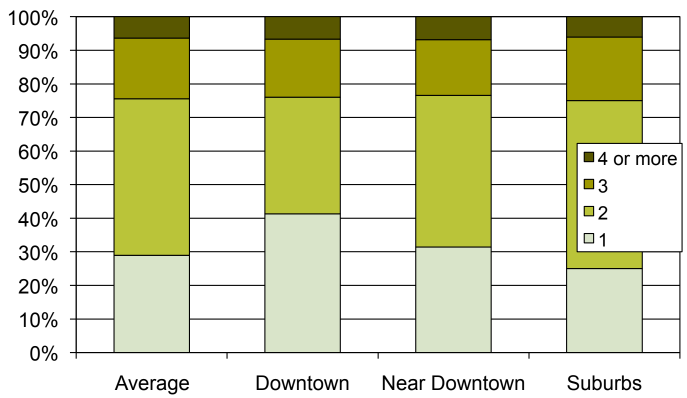


Figure 10: Number of children by home area (Table 9)

Downtown residents were ***less likely*** to have children than those living outside of **downtown**

Downtown residents were **more likely** to have come from outside of the **city**, **province** and **country**

Background

84% of all respondents were ***Caucasian,*** 7% reported ***Aboriginal*** heritage, 7% reported ***Asian***, while ***Latin American*** and ***African*** were each 1% of the total. Downtown and near downtown residents were less likely to be ***Caucasian***, 3% less and 4% less, respectively (Figure 11). This does not include those respondents that did not answer the question, or that answered as "Other".

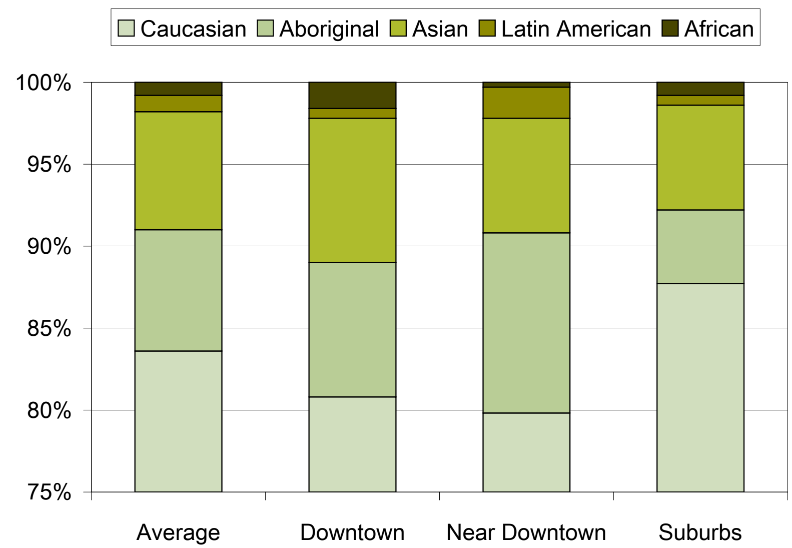


Figure 11: Ethnicity of respondents by home area (Table 10)

Respondents that were living downtown were less likely than those living elsewhere to have been ***born and raised in Winnipeg***. Of all downtown residents, 35% were ***born and raised in Winnipeg***, compared with 44% of those living near downtown, and 43% of those living in the suburbs. Downtown was the most likely place to find immigrants to Canada, with 12% of downtown residents reporting ***moving to Winnipeg from another country***, vs. 7% of those living in the suburbs and 7% of those living near downtown (Figure 12).

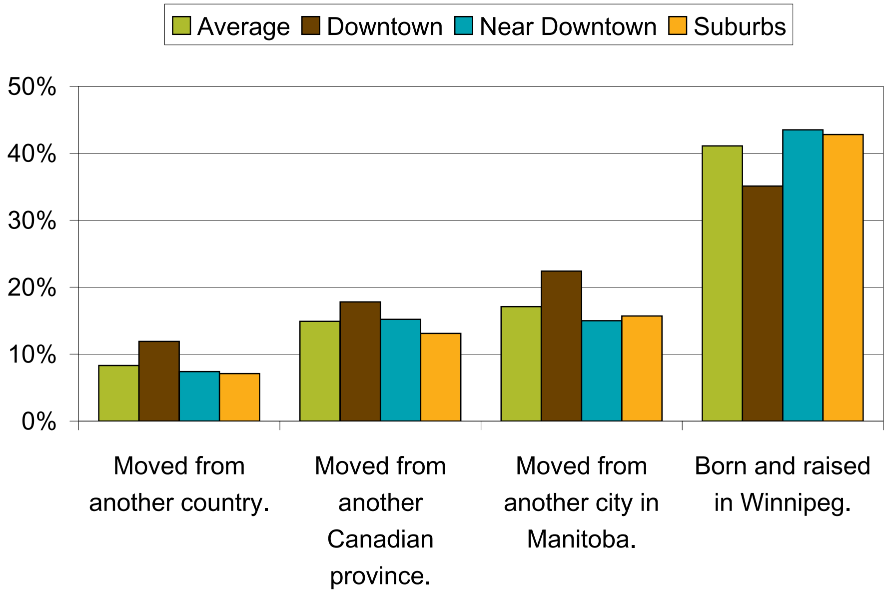


Figure 12: Origin story of respondents by home area (Table 11)

Transportation Around Downtown

Walking was the most common way to travel around downtown, chosen by 59% of all respondents. This was followed by ***busing*** (38%), driving alone (32%), and then ***carpooling*** (10%), ***biking*** (9%) and ***taxiing*** (6%). The group most likely to ***drive alone*** was those living in the suburbs, with nearly 4 in 10 choosing to do so (40%). Downtown residents were most likely to ***walk*** (79% or take the ***bus*** (40%) to travel around downtown (Figure 13).

Working Downtown

62% of respondents who lived downtown also ***worked downtown***, compared to 66% of those who lived near downtown and 79% of those respondents that lived in the suburbs (Figure 14). This is likely due, in part, to the advertising of the survey. Those people living downtown were likely to hear about the survey regardless of where they worked, whereas those people who lived outside the downtown would likely only have become aware of the survey if they worked or were otherwise interested in the downtown area. It is therefore not surprising that those people living in the suburbs were more likely to respond that they were employed downtown than downtown residents.

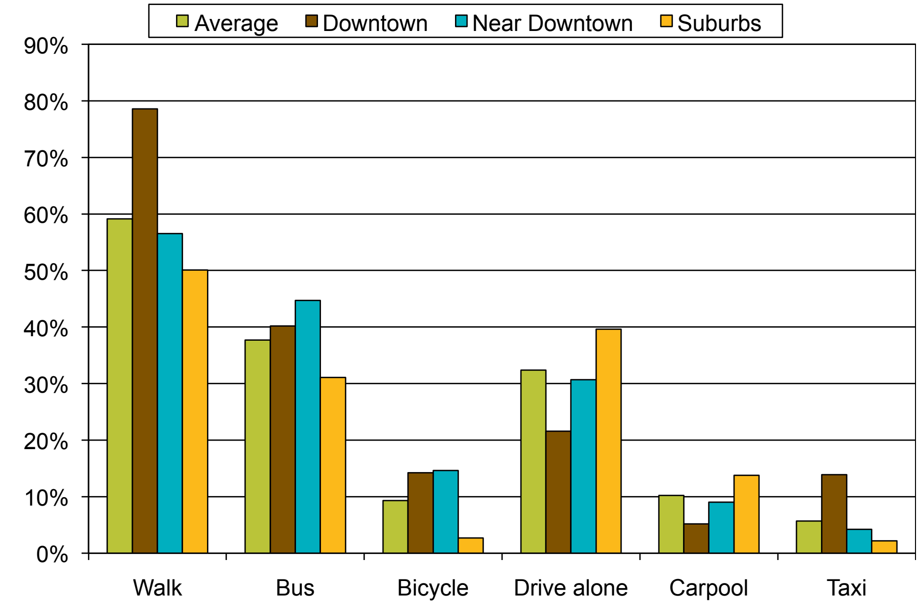


Figure 13: Transportation options around downtown by home area (Table 12)

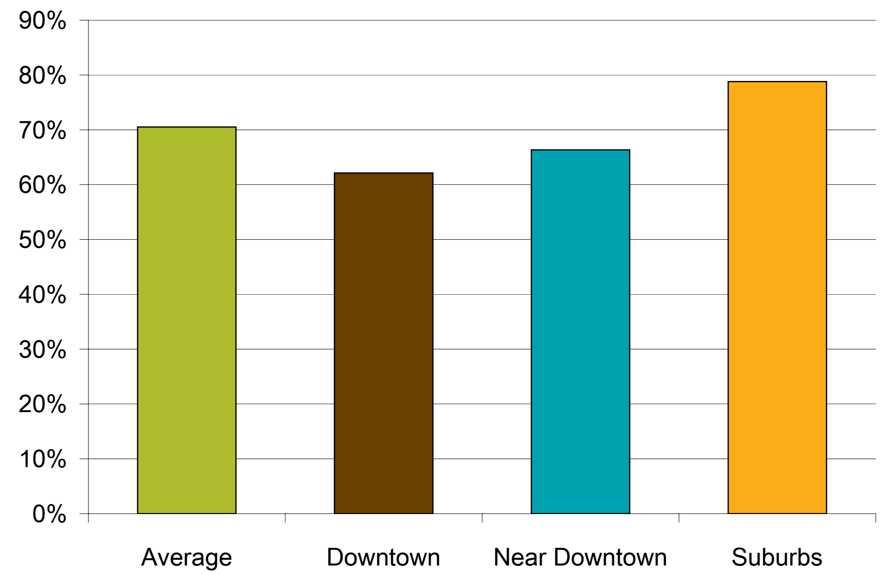


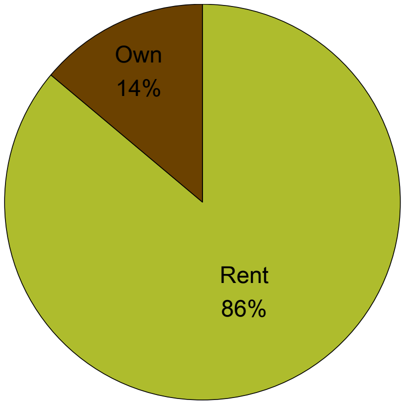
Figure 14: Work downtown by home area (Table 13)

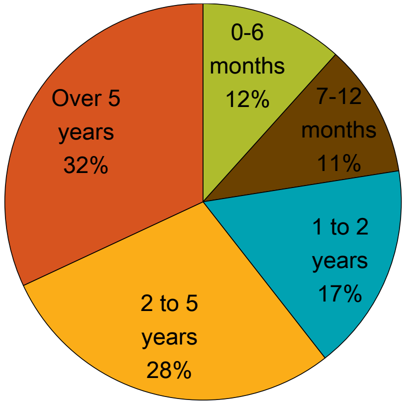
2.2 Downtown Residents

i. Profile of Downtown Residents

In order to explore the opinions of downtown residents more closely, those respondents who indicated they lived downtown were asked several follow-up questions, including whether they rented or owned their residence, how long they have lived downtown, and their reasons for living downtown.

Of the nearly one quarter of survey respondents who indicated that they lived downtown, 14% percent ***owned*** their residence, while 86% percent ***rented*** (Figures 15 & 16). The average respondent had lived downtown for 65.9 months, while the median respondent had lived downtown for 36 months (Table 16).





Figures 15 & 16: Housing Tenure of Downtown Residents & Length of Residence Downtown (Table 14, Table 15)

Proximity to ***work*** and ***shopping*** were the two highest rated reasons for living **downtown**

The most popular reasons given for living downtown were ***ability to walk to work*** (14%), ***proximity to downtown's shops and restaurants*** (14%), and ***proximity to entertainment, arts and culture*** (11%). The least cited reasons were ***proximity to nightlife*** (5%), and ***liking loft living*** (4%) (Figure 17).

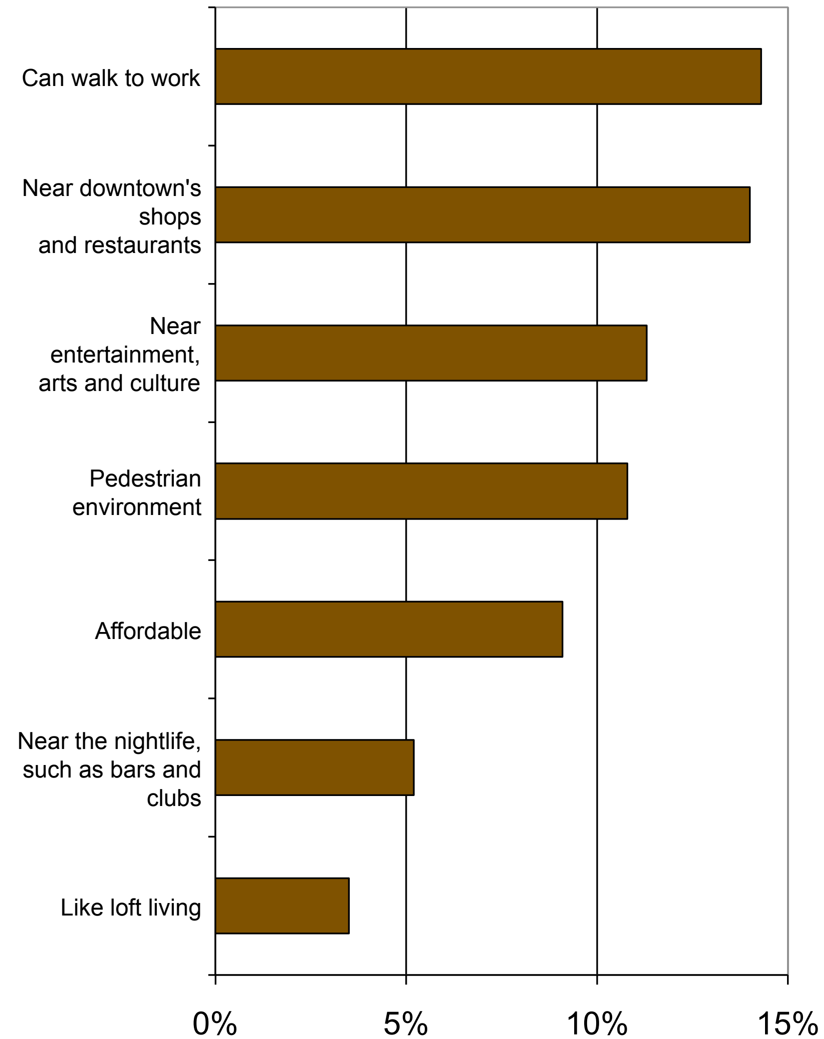


Figure 17: Reasons for Downtown Residency (Table 17)

ii. Comparison with 2006 Downtown Census Data

In order to determine what statistical biases might exist in this survey's sample population, a comparison was made to 2006 Census data. While the boundaries of the downtown census dissemination area (DA) did not match up perfectly with the boundaries of the study area, they did not deviate a great deal (Figure 18). It should also be noted that the numbers from the 2006 census have likely changed considerably since the time of the census, as a number of higher-end housing developments have taken place in the intervening years that would not be accounted for in the census but may have shown up in the BIZ survey.

Surveys delivered by the Internet tend to over-represent those individuals with higher education and higher incomes, due to the need for a computer to participate. It is for this reason that younger people (under 15) and older (over 65) are unlikely to take part, where in the census they are counted even if they are dependants. As this is an optional survey, it also tended to select a portion of the population that is willing to fill out the survey to qualify for the completion prize, as opposed to the Canada Census, which is mandatory. This likely influenced the groups of people represented by the survey. With that in mind, the difference shown between the census population and the survey's population of downtown residents shows that more people ***with children*** responded to the survey than the census would imply, 25% versus 15% (Figure 19).

This may have accounted for significant difference in incomes between the two groups, as well. 73% of survey respondents were making ***over $30,000 per year*** (household income), compared to 45% of the census population. The highest category earners (***$60,000 and over per year*** household income) accounted for 34% of the survey respondents; this was 22% more than the census group, which reported 12% of the population in that category (Figure 20).

Downtown residents in this survey were also generally more educated, with census respondents having only a ***high school diploma*** or an ***unfinished high school education*** accounting for 51% of the population, 34% higher than the respondents to the BIZ survey (Figure 21). Respondents to the BIZ survey were more likely to be of mid-career age than the census suggests, with 71% of respondents between the ages of ***25 and 49 years of age***, versus the census figures of 58% (Figure 22).

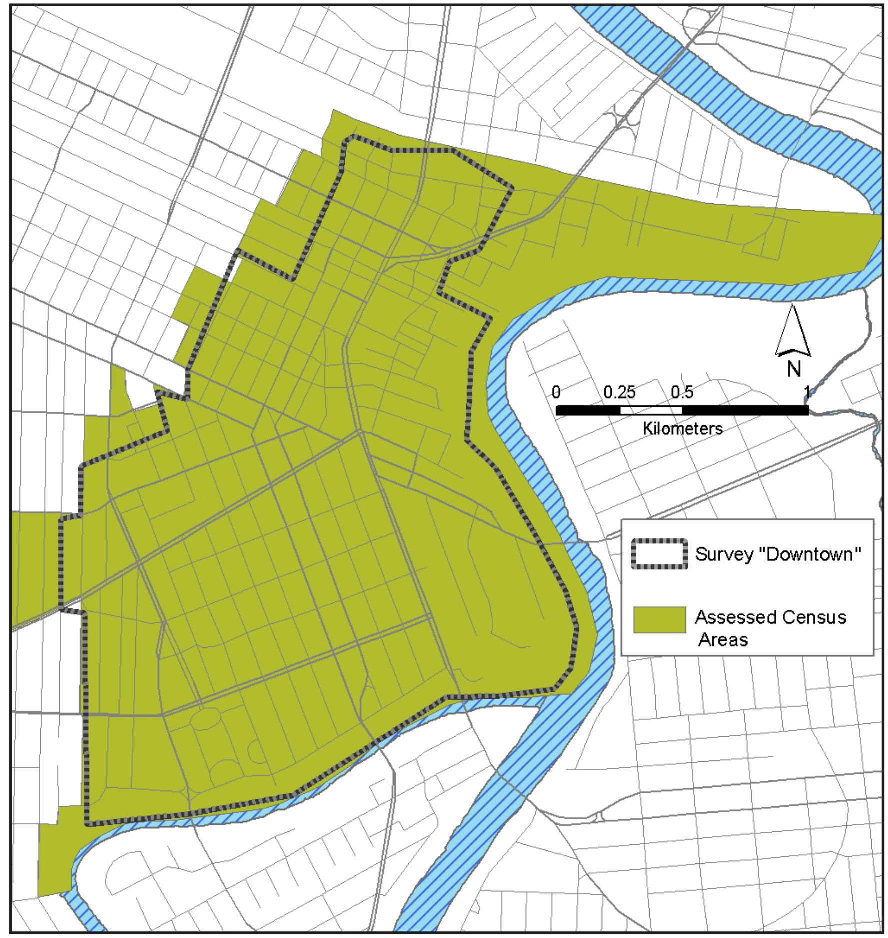


Figure 18: Comparison of survey boundaries with 2006 census dissemination areas

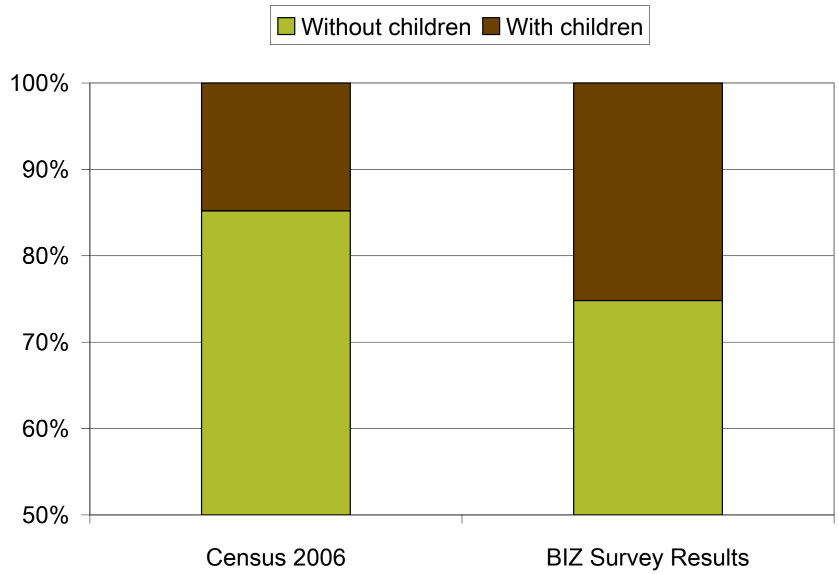


Figure 19: Comparison of family composition between survey results and 2006 Census (Table 18)

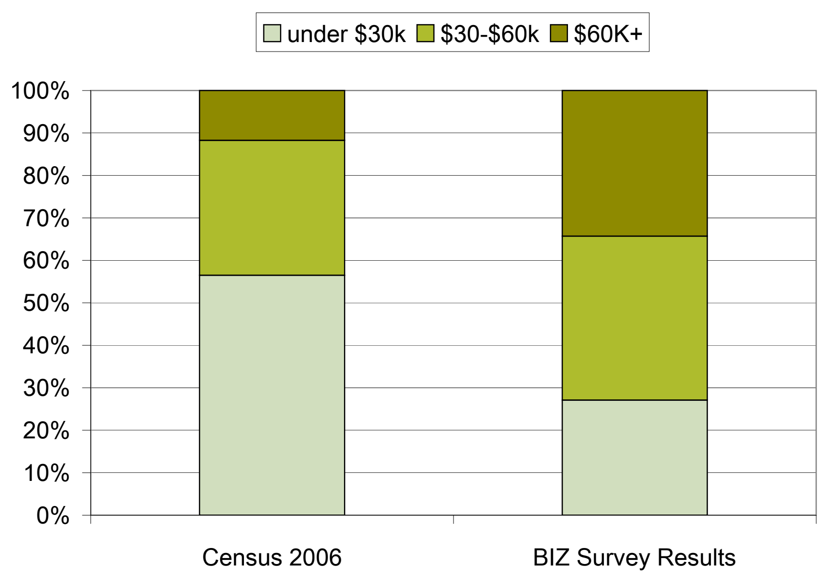


Figure 20: Comparison of income between survey results and 2006 Census (Table 18)

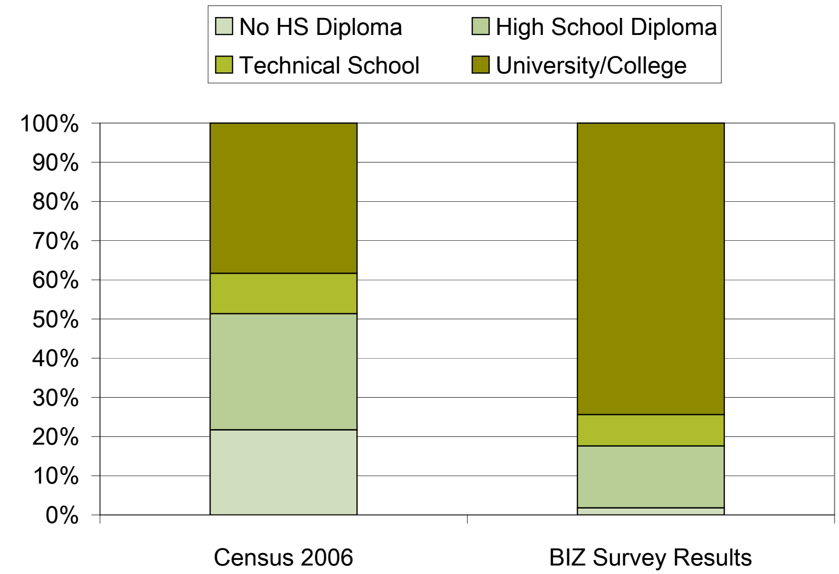


Figure 21: Comparison of education level of respondents between survey results and 2006 census (Table 18)

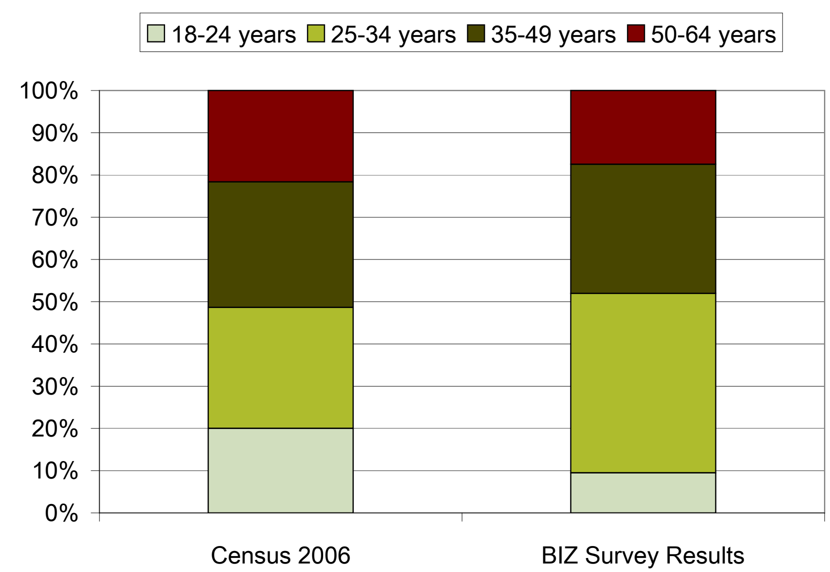


Figure 22: Comparison of ages between survey results and 2006 census (Table 18)

2.3 Behaviours and Needs

i. Downtown Dining

All survey respondents were asked various questions relating to downtown dining. Questions ranged from how often respondents purchased meals downtown, to types of restaurants most frequently visited.

Looking first at the types of meals purchased downtown, overall, ***coffee/snacks*** and ***lunch*** were the meals most frequently purchased at least once a week. Just over half of all respondents (50%) purchased ***coffee & snacks*** downtown at least once a week, followed by ***lunch*** (33%), ***breakfast*** (13%), and finally ***supper*** (8%) (Figure 23).

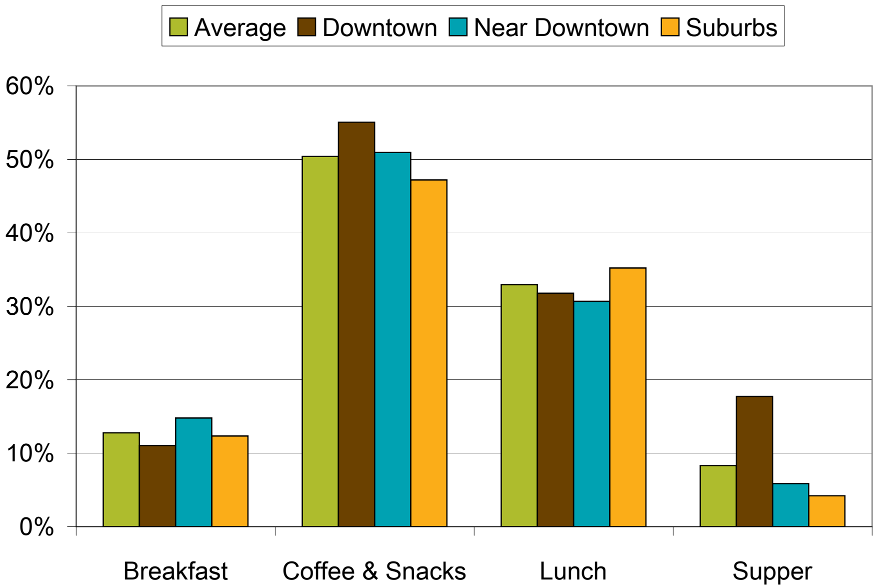


Figure 23: Weekly or daily food purchases by home area (Table 19)

Location of residence did not make a significant difference in frequency of ***breakfasts***, or ***lunches*** purchased downtown at least once a week. However, 18% of downtown residents purchased ***supper*** downtown at least once a week, compared to only 6% of those living near downtown, and 4% of those living in the suburbs. ***Coffee & snacks*** were purchased at least once a week by 55% of downtown residents, compared to 47% of suburbanites.

Meal expenditures were generally highest for ***lunch***, with 59% spending more than $10 per week. ***Breakfast*** had the lowest expenditures, with just 16% spending more than $10 per week. ***Supper*** had the second highest expenditures, with 58% of respondents spending more than $10. ***Coffee & snacks*** had 31% of respondents spending more than $10 per week (Figures 24 through Figures 27).

Part of this discrepancy is likely based on the unequal costs of the various meals. Coffee, snacks and breakfast items generally cost less than lunch or dinner items.

On average, downtown residents spent more than the other two resident groups, especially in the ***supper*** group, where 73% of downtown residents spent 10$ or more, versus 56% of near-downtowners and 49% of those living in the suburbs.

18% of **downtown residents** purchased ***dinner downtown*** at least once per week

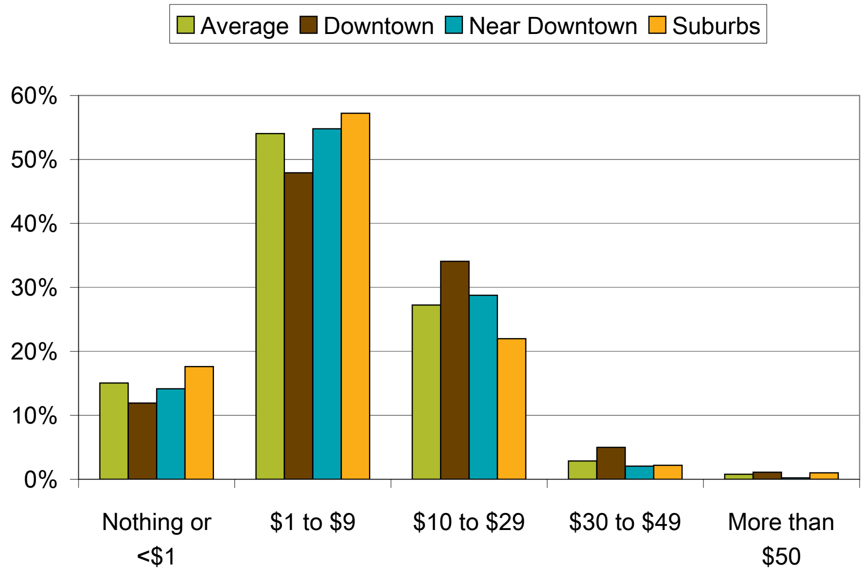


Figure 24: Breakfast Expenditures (Table 20)

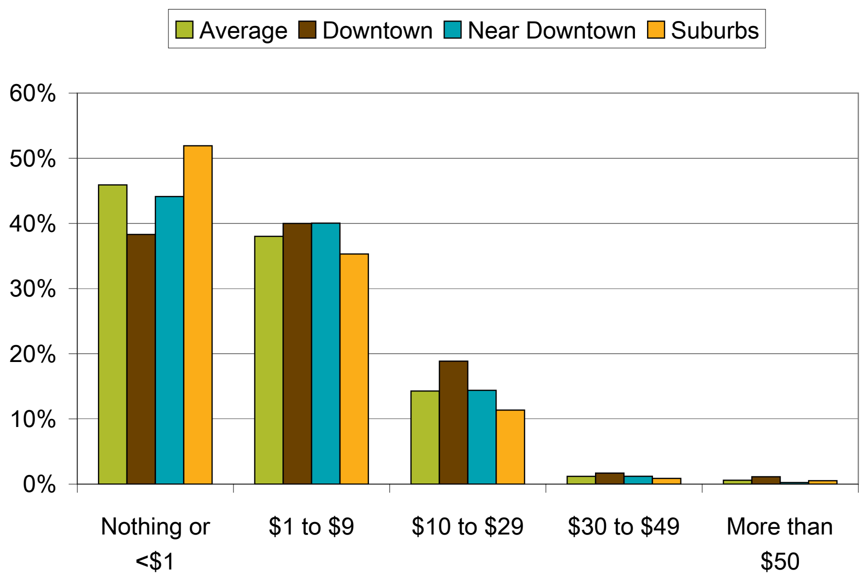


Figure 25: Coffee & Snack Expenditures (Table 21)

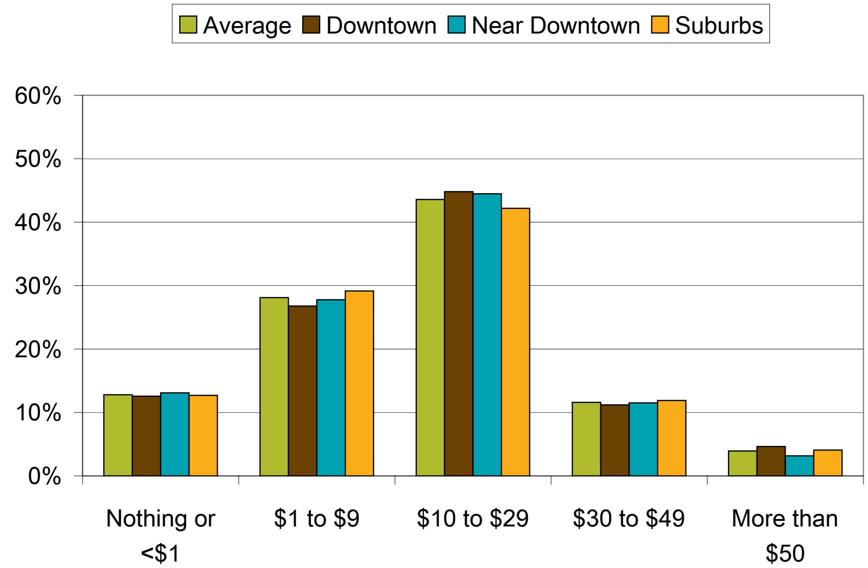


Figure 26: Lunch Expenditures (Table 22)

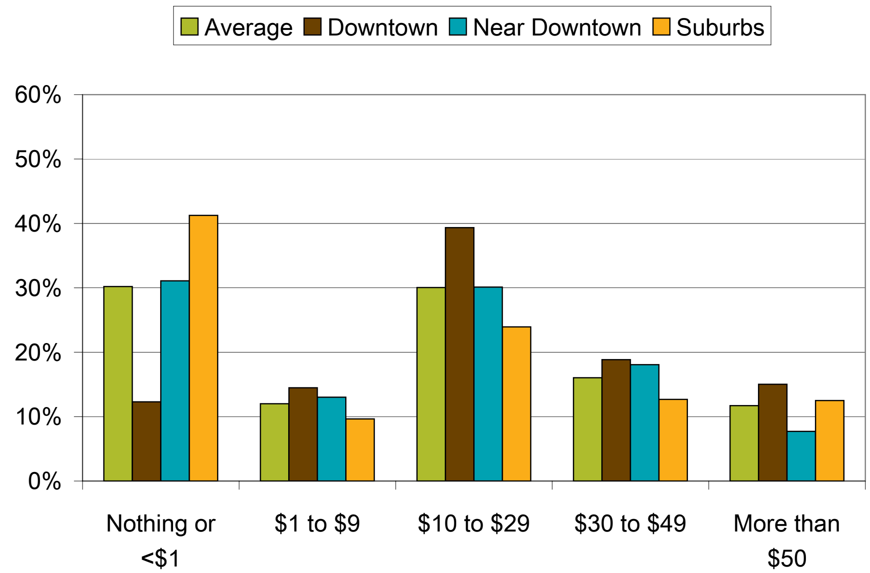


Figure 27: Supper Expenditures (Table 23)

The majority of respondents (79%) cited ***coffee shops, cafeterias, and cafés*** as the type of restaurant they most frequently visited downtown. This was followed by ***casual/bistro*** (57%), ***Chinese, Thai, and Japanese*** (56%), and ***pub/bar*** (43%). ***Fine dining*** (28%), ***Indian*** (22%), ***other Asian*** (14%) and ***other ethnic*** (15%) were quite a bit less popular (Figure 28).

Fast food responses followed the same trends as for regular restaurants. Results were similar for all groups of respondents, regardless of location of residence. One exception to this was for ***pizza***. ***Pizza*** was enjoyed more often by downtown residents than by those living near downtown or in the suburbs (Figure 29).

79% of respondents cited coffee ***shops, cafeterias, and cafes*** as the type of restuarant they most frequently visited **downtown**

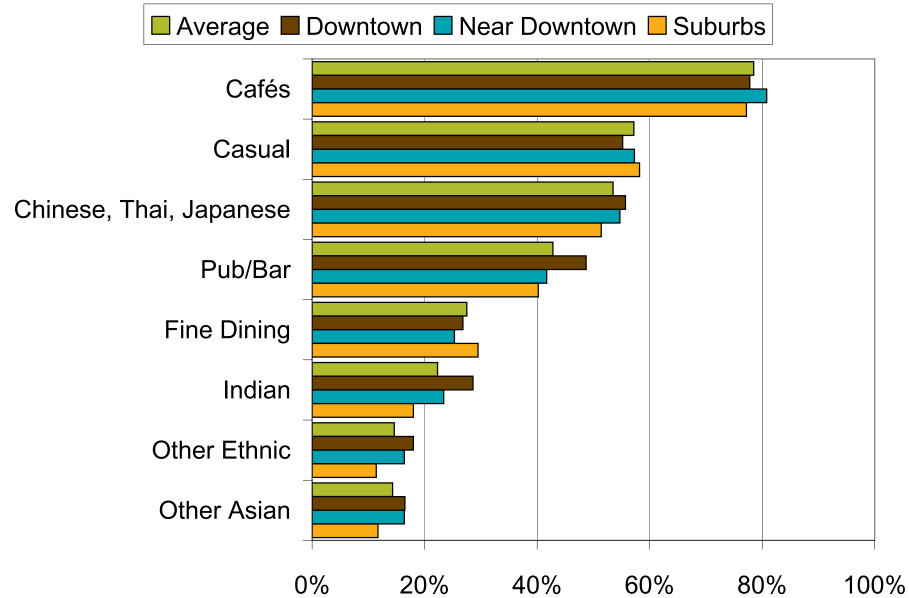


Figure 28: Popularity of restaurant types (Table 24)

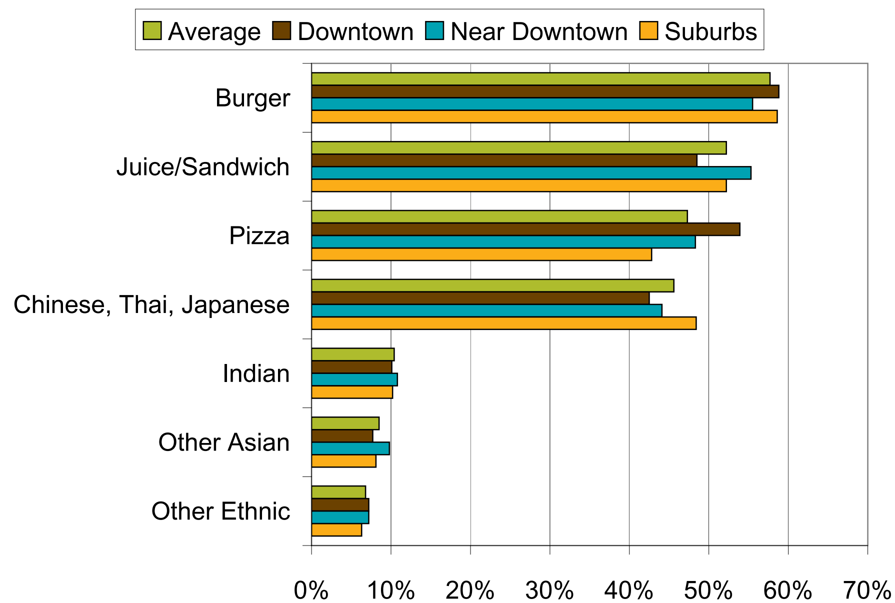


Figure 29: Popularity of fast food restaurant type (Table 25)

ii. Downtown Shopping

Respondents were asked a variety of questions related to shopping downtown, including preferred days of the week, shopping areas, and products and services purchased or accessed.

On average, there was a trend of increased shopping throughout the work week, dropping off abruptly on the weekend. Shopping downtown was most popular on ***Thursdays*** and ***Fridays,*** with 54% and 58% of respondents indicating they shopped on those days. ***Saturday*** and ***Sunday*** were the least popular with just 33% and 16%. This trend was seen in both those who lived near downtown and in the suburbs. For downtown residents, ***Thursday*** was slightly less popular than average, while ***Friday*** and ***Saturday*** were the most popular days to shop downtown, with downtowners being almost twice as likely to shop on ***Saturday*** than the average. ***Sunday*** was more popular a shopping day for downtown residents than ***Saturday*** was for everyone else (Figure 30).

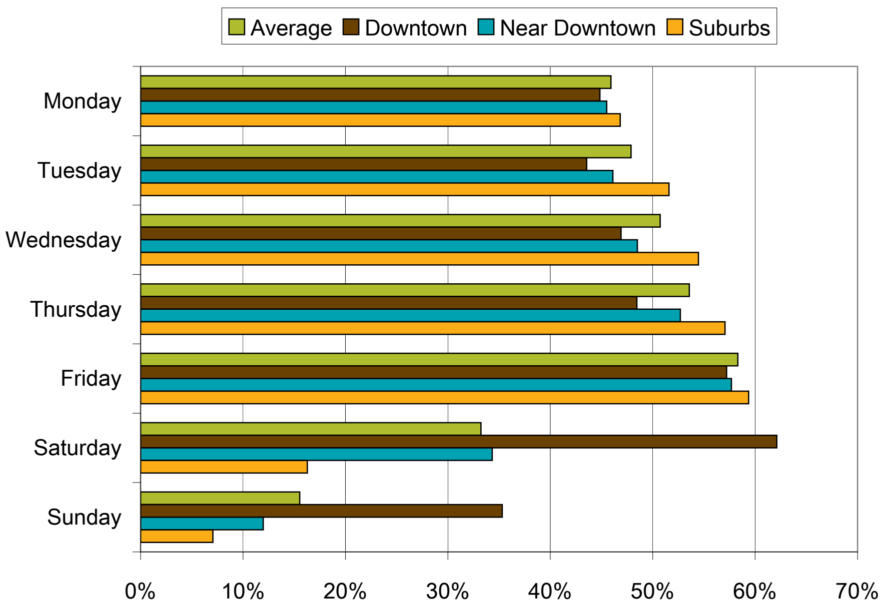


Figure 30: Days of week shopping downtown by home area (Table 26)

When respondents were asked to identify the time of day they most frequently shopped downtown, the largest proportion of respondents shopped at ***lunchtime*** (52%), followed by ***mid-afternoon*** and ***late afternoon/after work*** (both 34%), ***mid-morning*** (19%), ***evening*** (13%), and ***morning/before work*** (5%).

Downtown residents were far more likely than other groups to shop ***after work*** (56%) and in the evening (29%), while those living near downtown and in the suburbs were more likely to shop during ***lunchtime*** (52% and 63%, respectively)(Figure 31).

On average, **Saturday** and **Sunday** were the two least popular days to ***shop downtown***

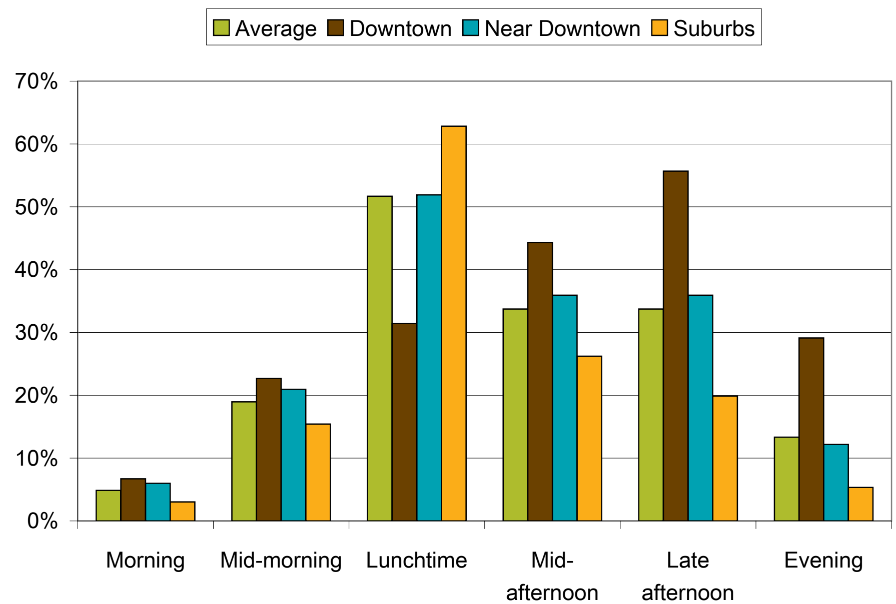


Figure 31: Time of day shopping downtown (Table 27)

Downtown Shopping Areas

Respondents were asked to select from a list which shopping areas they frequented downtown. ***Portage Place*** was most popular with over two-thirds of all respondents (67%) visiting once a month or more. Next most visited was ***cityPlace***, with half (50%) visiting. This was followed by ***the Forks*** (44%), ***Winnipeg Square*** (39%), ***Portage Avenue*** (24%), ***the Exchange District*** (24%), and the ***Graham mall*** (16%)(Figure 32).

Across the board, downtown residents were more likely to frequent downtown shopping areas. This higher likelihood is to be expected, given their constant proximity to these areas.

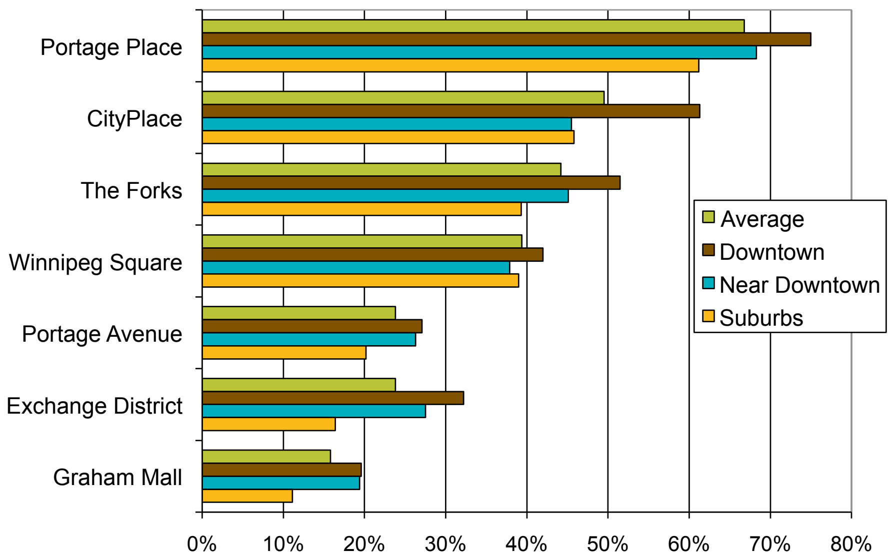


Figure 32: Popularity of downtown shopping areas (Table 28)

67% of all respondents visited **Portage Place** at least ***once a month***

Shopping Areas Outside of Downtown

Winnipeg's downtown competes with other large shopping centres in Winnipeg. Asked about their habits, the most popular shopping destination outside of downtown was ***Polo Park***, which attracted 57% of all respondents once a month or more often. The next most visited shopping areas were ***St. Vital*** (43%), ***Osborne Village*** (35%), ***Grant Park*** (31%), ***South Winnipeg*** (26%), ***Kildonan Place*** (25%) and ***Corydon*** (23%). Less frequented were the shops along ***Academy Road*** (13%), ***Garden City*** (12%), and ***River Heights*** (10%).

Comparisons between resident groups showed considerable variation in popularity of destinations outside of downtown. ***Osborne Village, Polo Park*** and the ***Corydon*** area are much more popular among downtown residents than suburbanites – 40%, 19% and 16% more popular. ***South Winnipeg***, ***St. Vital*** and ***Kildonan Place*** were 21%, 11%, and 11% more popular among suburbanites than downtown residents (Figure 33).

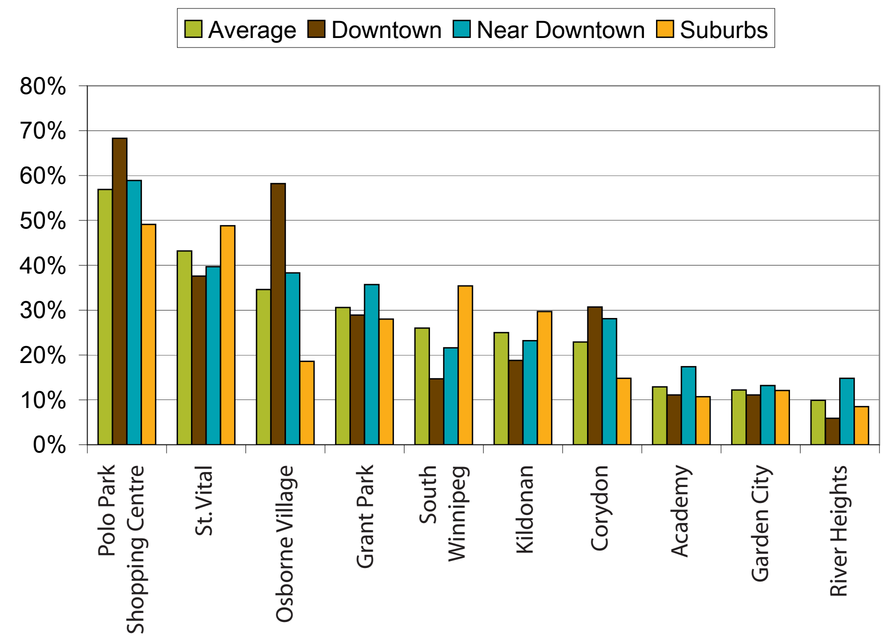


Figure 33: Popularity of shopping destinations outside of downtown (Table 29)

Products Purchased Downtown

When asked what products were purchased most frequently downtown, the two most popular categories were ***clothes*** (51%) and ***drugstore items*** (50%) The two least popular categories were ***flowers and plants*** (3%) and ***fabrics*** (2%). Downtown residents were much more likely to purchase ***drugstore*** and ***grocery items*** than other groups (62% and 66%, respectively)(Figure 34).

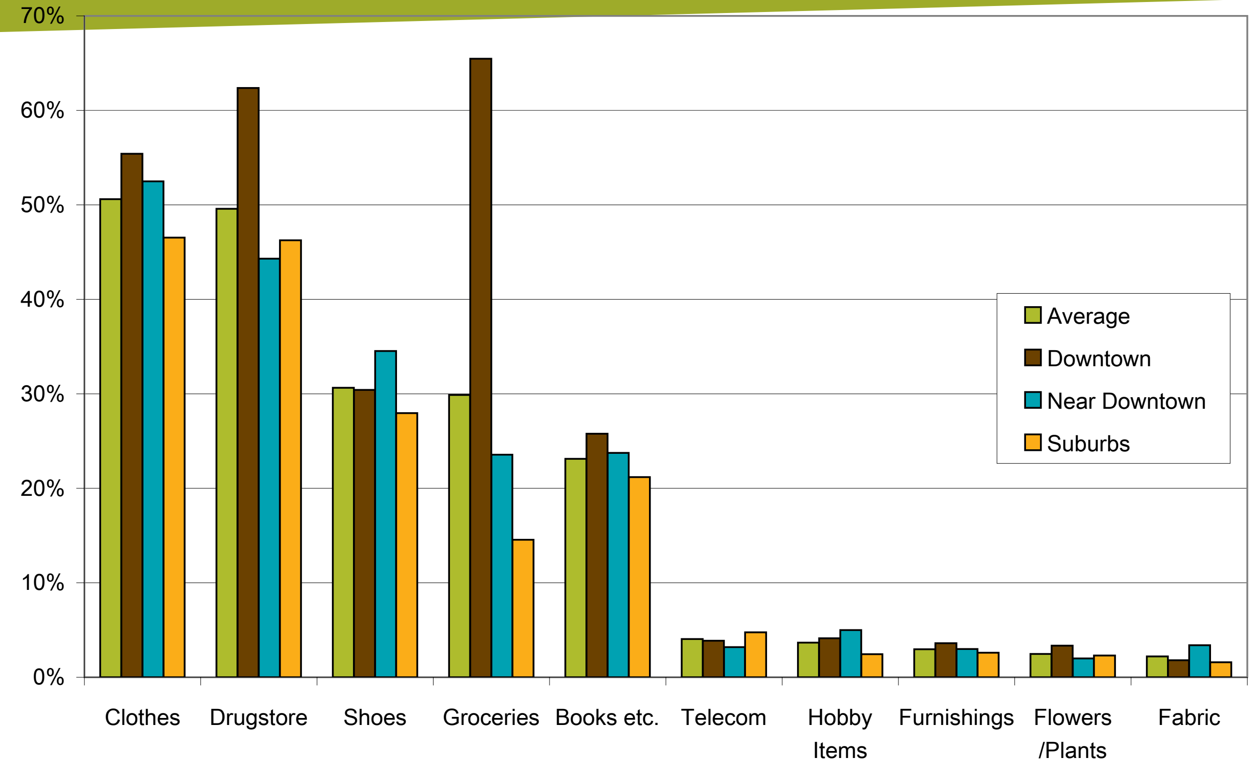
Products Purchased Outside of Downtown

Outside of downtown, ***grocery items*** were the most popular category of products purchased (64% of respondents), followed by ***clothes*** (61%), ***shoes*** (40%), and ***electronics*** (33%). ***Drugstore items*** (27%), while second most popular in the downtown region, moved to fifth most popular ouside of the downtown (Figure 35).

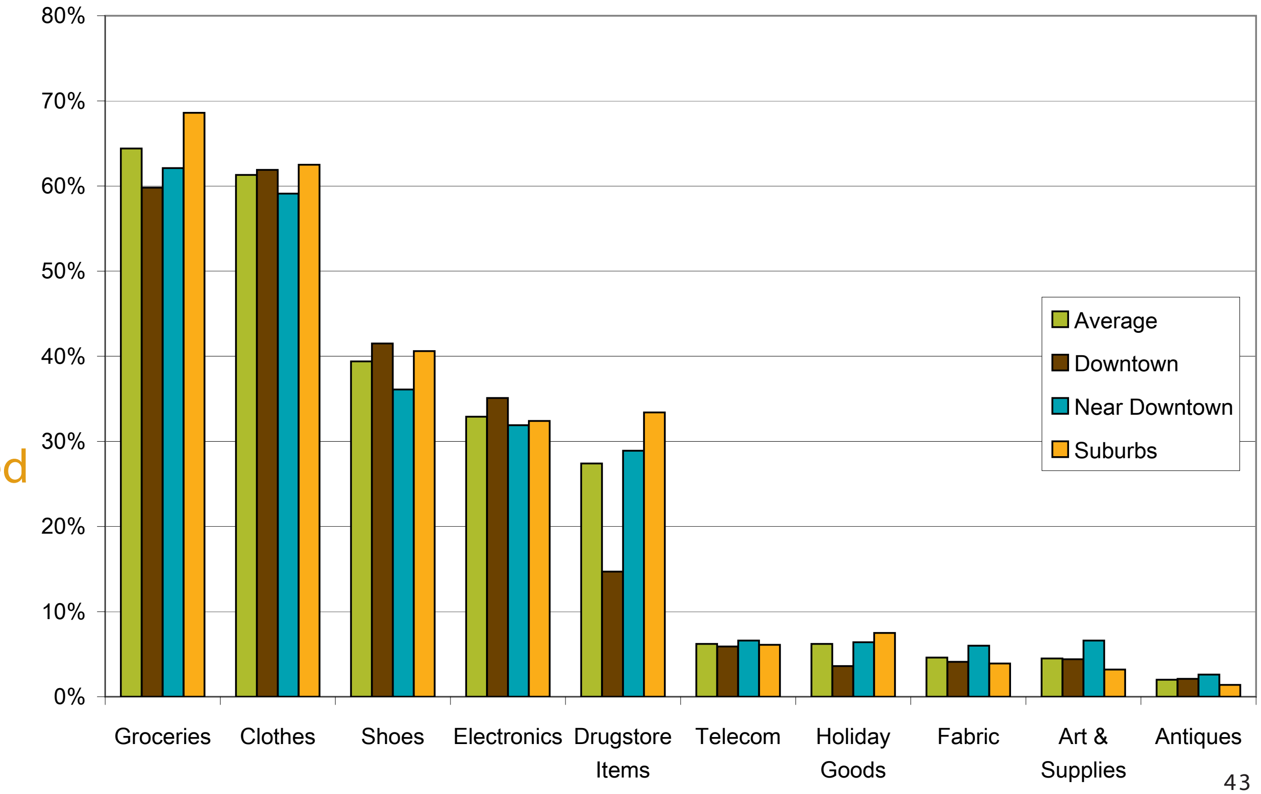
Popularity levels were quite similar between all three area groups for most categories except ***drugstore items***, where downtown residents were less than half as likely as those living outside of downtown to patronize drugstores outside of the downtown (15% compared to 33%).

Drugstore items were purchased **downtown** by almost **50%** of all respondents

Figure 34: Top & bottom 5 products purchased downtown (Table 30)



Figures 35: Top & bottom 5 products purchased outside of downtown (Table 31)



Services Accessed Downtown

In terms of services accessed downtown, 70% of respondents indicated they accessed ***bank*** services most frequently, followed by ***postal services*** (50%), ***medical*** (30%), ***hair salons*** (23%), and ***optical services*** (19%). The services least often accessed were ***framing, printers,*** and ***wireless cafe*** (3%, 2% and 2%, respectively)(Figure 36).

Downtown residents were more likely to access nearly all services downtown by a significant amount; particularly ***banks, postal service***s, and ***hair salons***, frequented by 80%, 59%, and 36%, respectively. Downtown ***churches*** were also accessed more frequently by downtown residents (10% of downtown respondents, almost double the average).

Services Accessed Outside of Downtown

The most frequently accessed service outside of downtown was ***bank services*** (45%, compared to the 70% who accessed ***bank services*** downtown). ***Postal services*** were also less popular outside of the downtown (22% of respondents vs. 49% in the downtown). 38% and 36% of respondents indicated they accessed ***medical services*** and ***hair salons*** outside of the downtown, compared to 30% and 23% within downtown. ***Massage therapy,*** which did not rank in popular services accessed downtown, was fifth most popular outside of the downtown, with 21% of respondents indicating they used such services (Figure 37).

Figure 36: Top & bottom 5 services accessed downtown (Table 32)

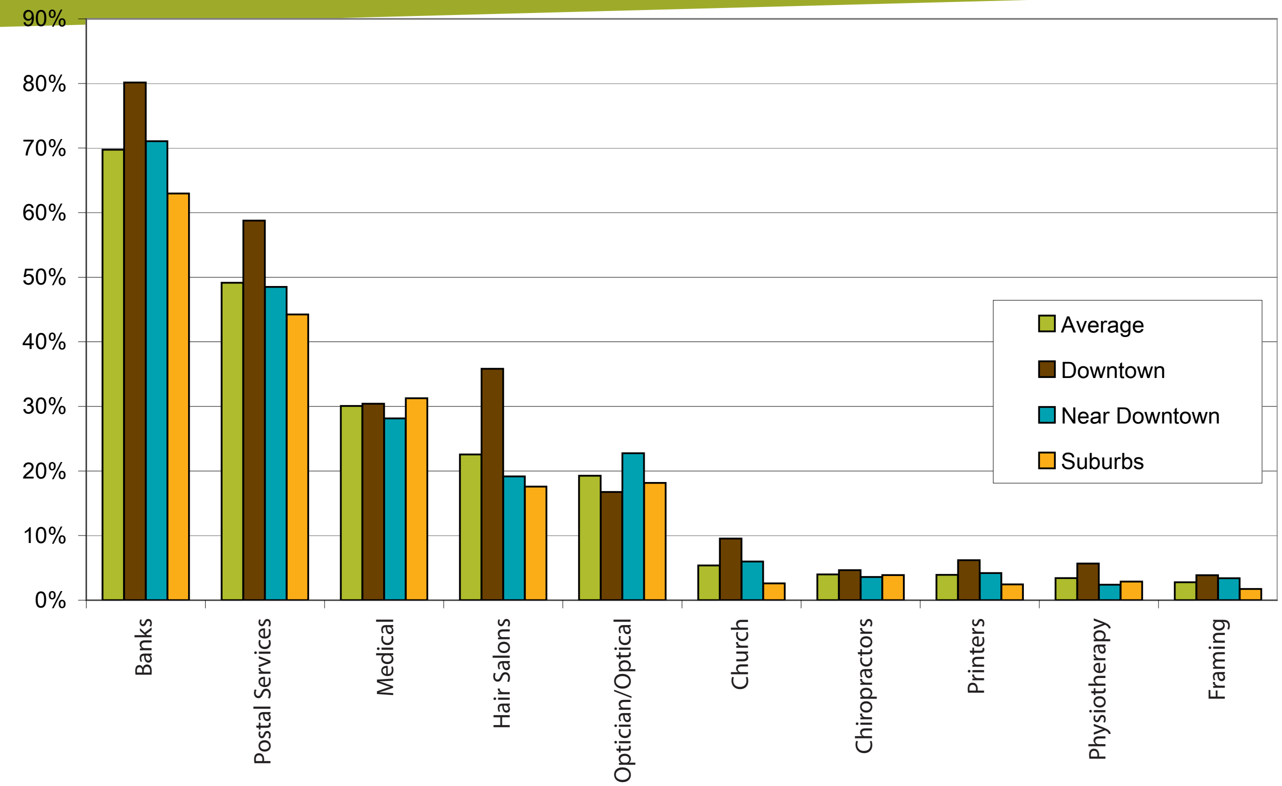
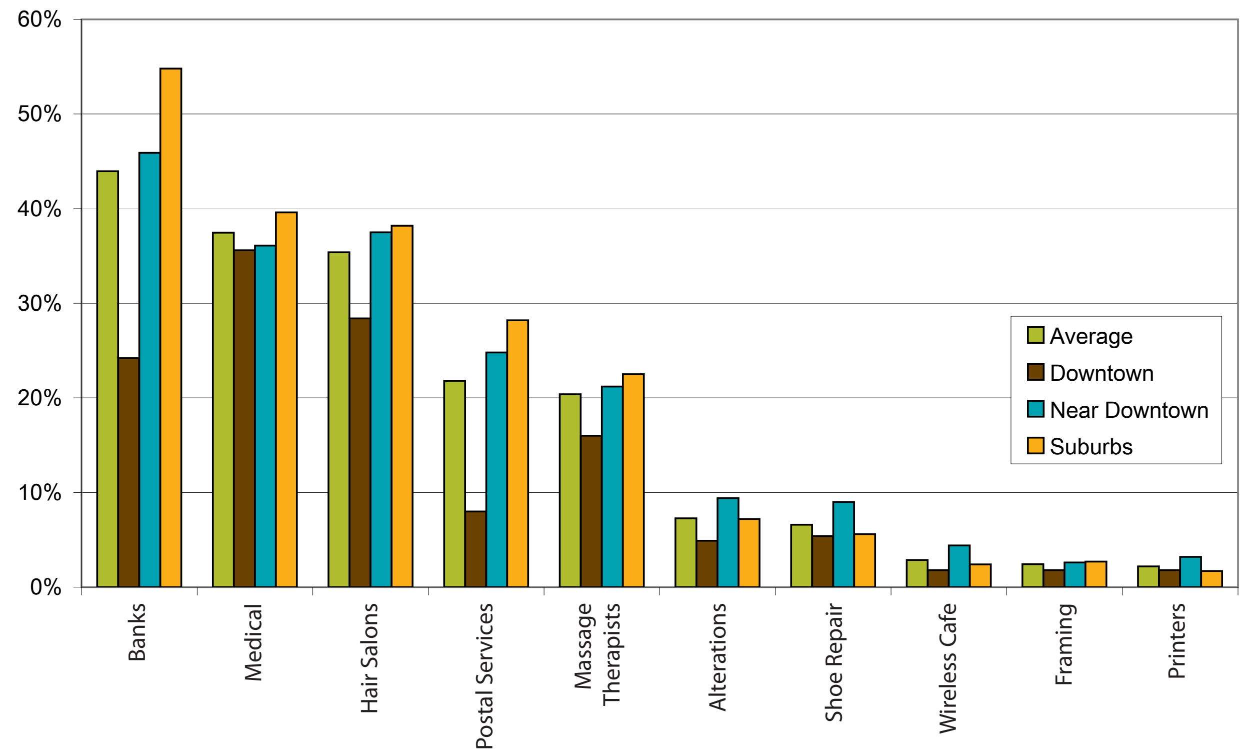


Figure 37: Top and bottom 5 services accessed outside of downtown (Table 33)



76% of respondents indicated they ***would*** or ***might be willing*** to consider buying products or services were they available downtown. Only 18% were unwilling to consider the possibility. Downtown residents were most willing (66%) to consider buying products if they were available downtown, while only 23% of those living in the suburbs reported the same (Figure 38).

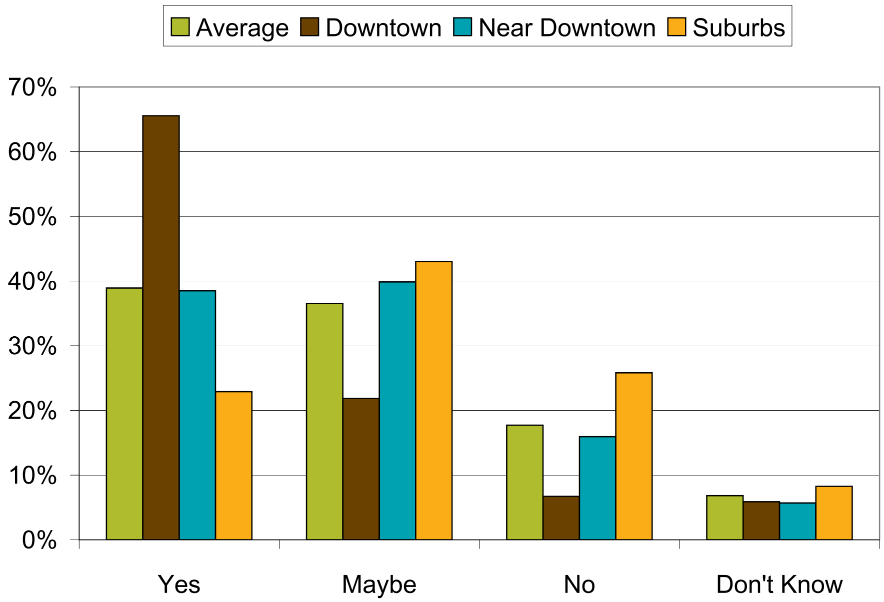


Figure 38: Respondents willingness to purchase services products/services if they were downtown (Table 34)

89% of downtown residents reported grocery shopping ***outside of downtown*** at least **once per month**

Grocery Shopping

44% of respondents indicated they shopped for groceries ***downtown*** once a month or more often. 96% said they shopped for groceries ***outside of downtown*** once a month or more often.

Not surprisingly, downtown residents shopped for groceries ***downtown*** more frequently than any other group, 82% versus the average. All three resident groups had a high proportion of residents that shopped for groceries ***outside of downtown*** (Figure 39).

Polo Park was the most popular grocery shopping destination outside of downtown, with 27% of respondent's patronage. This was followed by ***St.Vital*** (19%), ***Kenaston,*** and ***River Heights*** (both at 15%)(Figure 40).

Superstore was the most popular grocery store visited outside of the downtown area, (61% of all respondents reported visiting frequently). This was followed by ***Safeway*** (59%), and ***Sobey's*** (42%)(Figure 41).

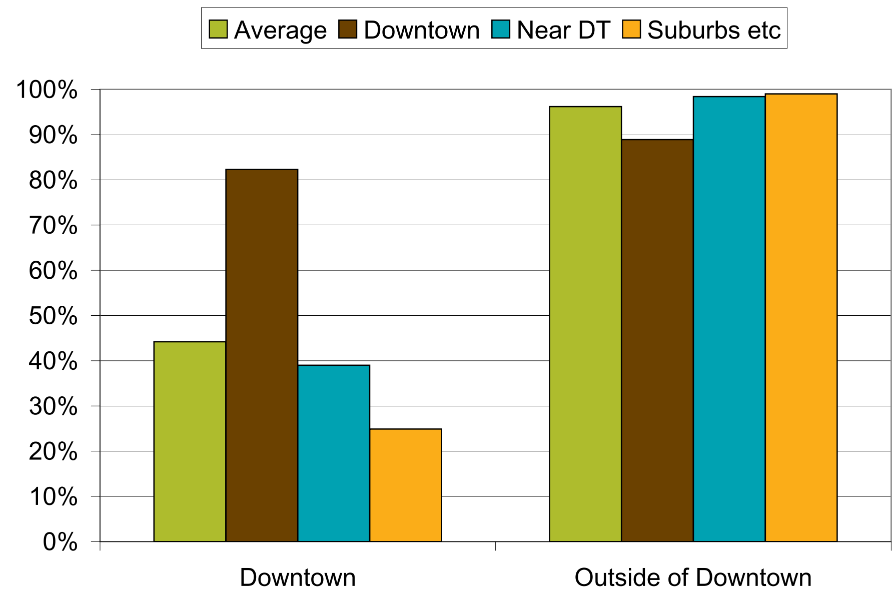


Figure 39: Grocery shopping destination preferences (once a month or more) (Table 35)

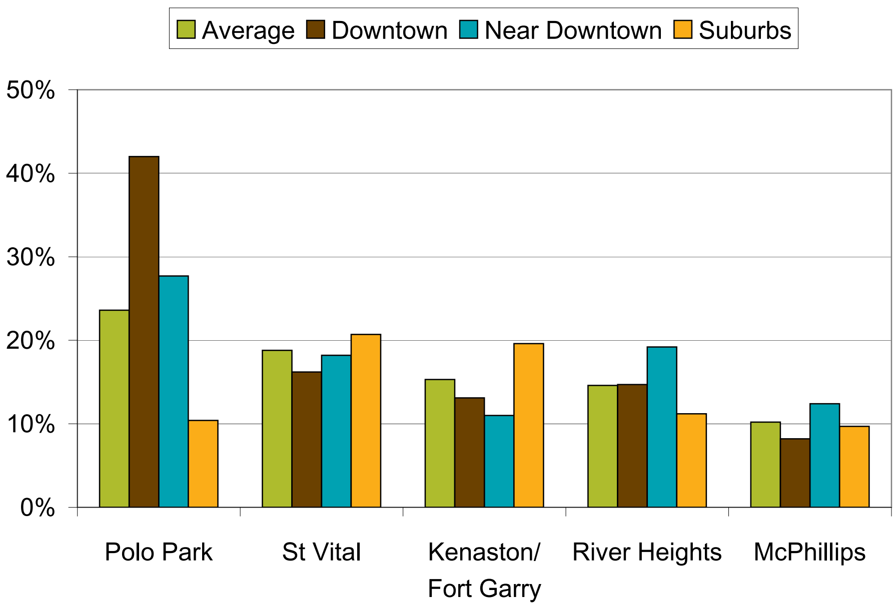


Figure 40: Popularity of city areas as grocery shopping destinations (Table 36)

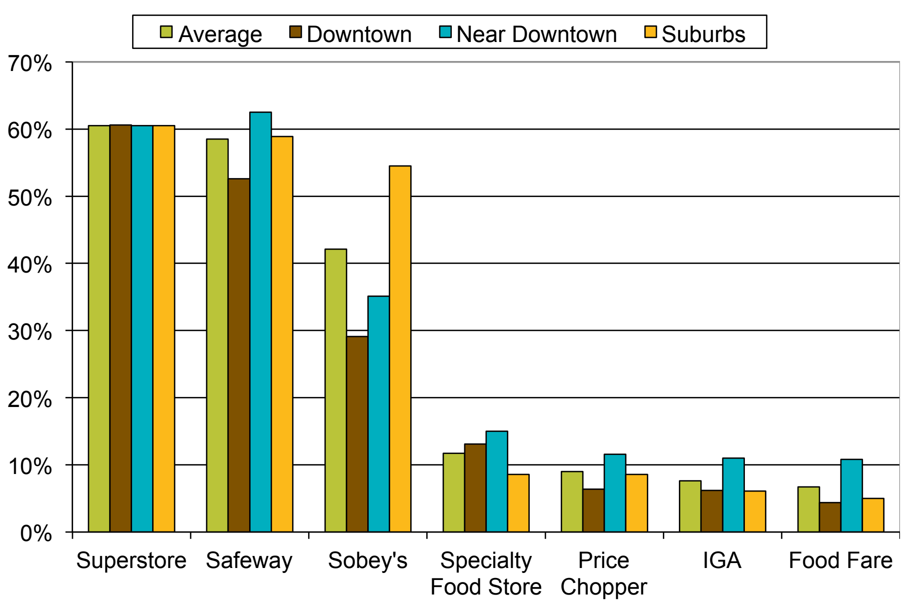


Figure 41: Popularity of grocery stores outside of downtown (Table 37)

iii. Downtown Entertainment

The downtown area offers many different entertainment activities and venues. Respondents were asked how often they went or stayed downtown to attend eight different activities. The activity with lowest attendance, ***visiting a gallery,*** had 20% of total respondents attending at least once a month. ***Concerts*** were the best attended events, with 45% of respondents going at least once a month, followed by ***movies*** (37%), ***community events*** and ***festivals*** (33%), ***theatrical performances*** (31%), ***sporting events*** (30%) and ***night clubs*** (22%)(Figure 42).

Downtown residents were more likely to attend downtown events, with the exception of ***sporting events,*** which was very slightly more popular among those from the suburbs than downtown. Near downtown residents were more likely to attend events than respondents from the suburbs, but less than those living downtown.

Respondents were asked about specific event and venue destinations. Home area of respondents had a strong influence on event attendance, with an average 5% difference in people attending an event coming from the downtown as opposed to the suburbs (Figures 43a and 43b).

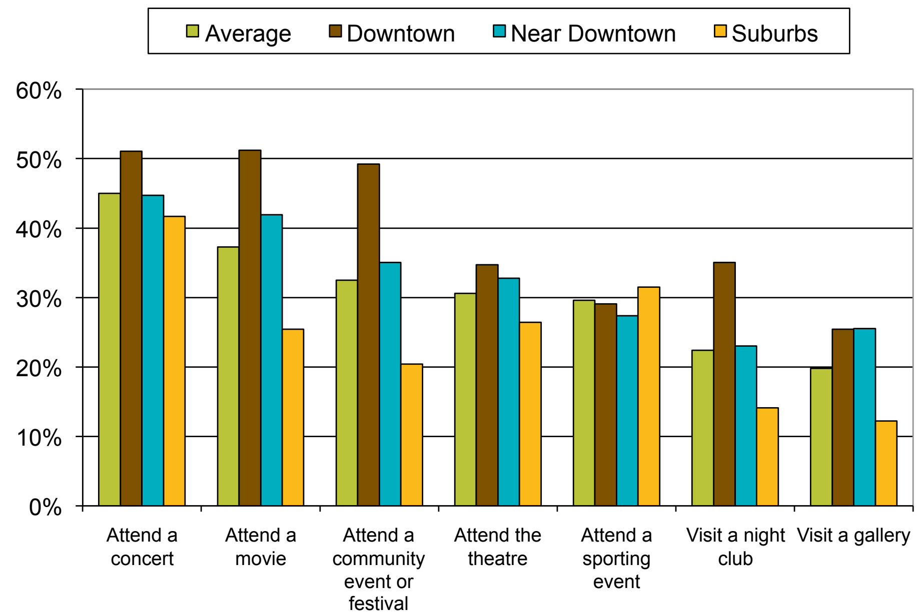
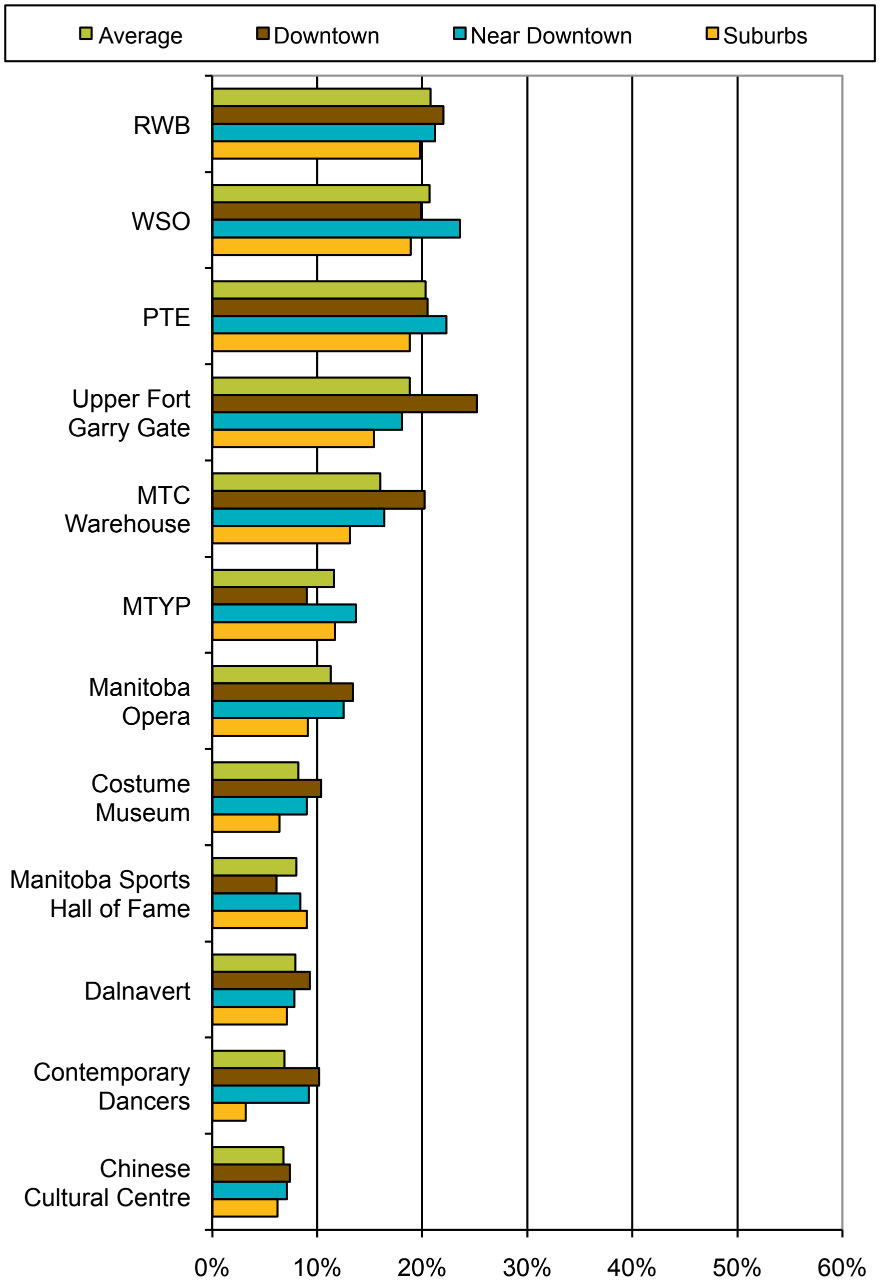


Figure 42: Monthly or better attendance at downtown events (Table 38)



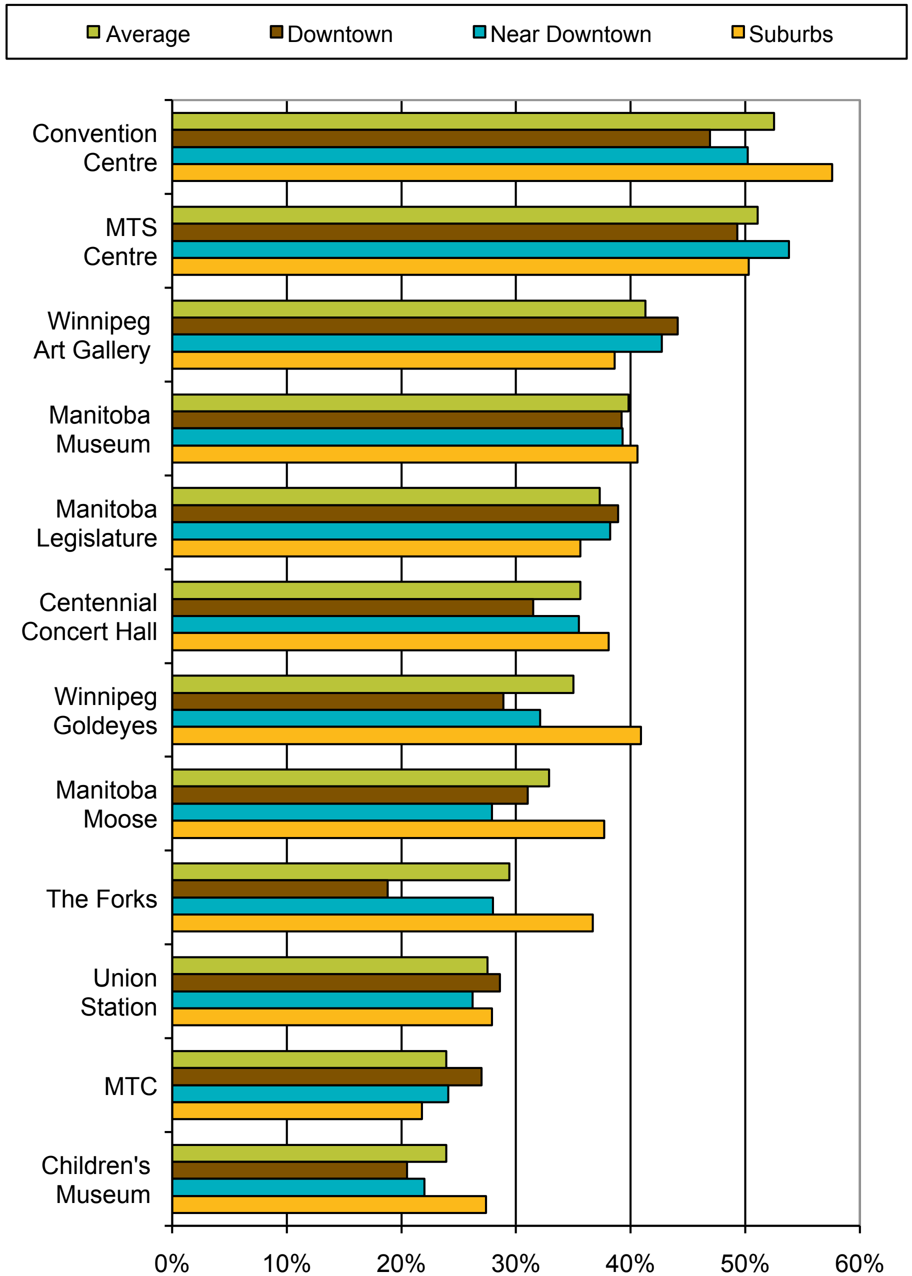


Figure 43a and 43b: Attendance at venues downtown (Table 39)

The events that downtown residents attended more often than suburbanites tended to be cultural events and destinations including the ***Manitoba Opera*** (13% of downtown residents, 4% more than suburbanites), the ***WAG*** (44%, 5% higher), the ***Upper Fort Garry Gate*** (25%, 10% higher) and the ***Costume Museum*** (10%, 4% higher). Suburbanites tended to frequent family and major event destinations more. These included ***MTYP*** (12% of suburbanites, 3% more than downtown residents), the ***Convention Centre*** (58%, 11% higher), the ***Winnipeg Goldeyes*** (41%, 12% higher), the ***Manitoba Moose*** (38%, 7% higher) and the ***Centennial Concert Hall*** (38%, 6% higher).

Downtown Winnipeg boasts venues for first-run mainstream films as well as art-house and independent work and even an IMAX 3D theatre. 35% of respondents went to a downtown movie theatre at least once per month. This varied between resident groups - the proportion of downtown residents ***seeing movies in the downtown*** was much higher than that of people from the suburbs (49% compared to 22%). Near downtown residents were also good attendees, with 42% attending a downtown theatre once a month or more.

The best attended theatre downtown was the ***Globe Cinema***, with 21% of all respondents reporting attendance, followed by the ***Towne 8*** (15%), the ***Imax*** (16%) and ***Cinematheque*** (8%) (Figure 44). Outside of the downtown the most visited theatre by far was ***Silver City Polo Park***, with 45% of respondents going once a month or more. ***Silver City St. Vital***, ***Grant Park Cinemas*** and ***Cinema City McGillvray*** were all visited by more people than the ***Globe*** (29%, 29% and 25% versus 21%, respectively)(Figure 45).

35% of all respondents attended a **downtown movie theatre** at least once per month

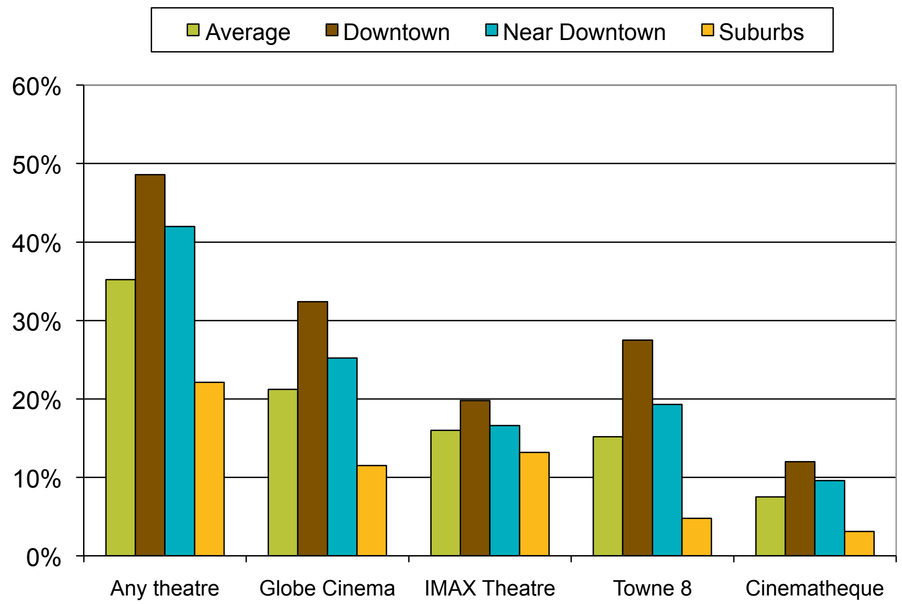


Figure 44: Monthly visits to downtown cinemas (Table 40)

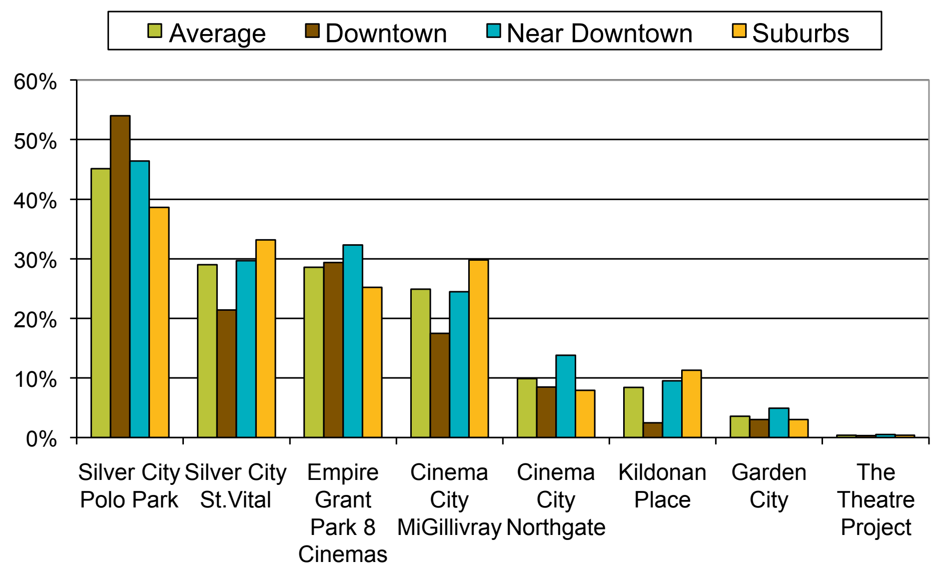


Figure 45: Monthly visits to cinemas outside of downtown (Table 41)

iv. Perceptions of Downtown

Survey respondents were shown various phrases, and were asked to indicate if they felt the phrases accurately represented the downtown. All of the phrases reflected the downtown in a positive light, and responses ranged from strongly disagree to strongly agree.

There were five phrases that significantly more respondents agreed with than disagreed with. They were that the downtown is…***the city's #1 dining and entertainment destination*** (44% agreed, 41% disagreed), …***where all the big events happen*** (70% agreed, 14% disagreed), …***the city's cultural and heritage capital*** (71% agreed, 10% disagreed), …***the heart of the city*** (66% agreed, 15% disagreed) and …***continuously changing for the better*** (45% agreed, 25% disagreed)(Figure 46).

The phrases that more respondents disagreed with were that the downtown is…***a gathering place*** (42% disagreed, 37% disagreed), …***a full service shopping area*** (51% disagreed, 30% agreed), …***pedestrian friendly*** (42% disagreed, 38% agreed) and …***an overall clean place*** (43% disagreed, 32% agreed). A relatively equal number of respondents agreed as disagreed with the phrase ***the downtown is a boutique shopping area***.

As reported in the Downtown Workers 2008 survey, perceptions of safety downtown are a significant issue for the BIZ to contend with.

Responses indicate a fair improvement in perceptions of safety, though nighttime still suffers from an extremely poor impression. In total, respondents reporting that they ***feel safe during the day*** downtown accounted for 75% of respondents (an improvement of 6%). Only 25% of respondents reported that they ***feel safe during the night*** (an improvement of 4%)(Figure 47).

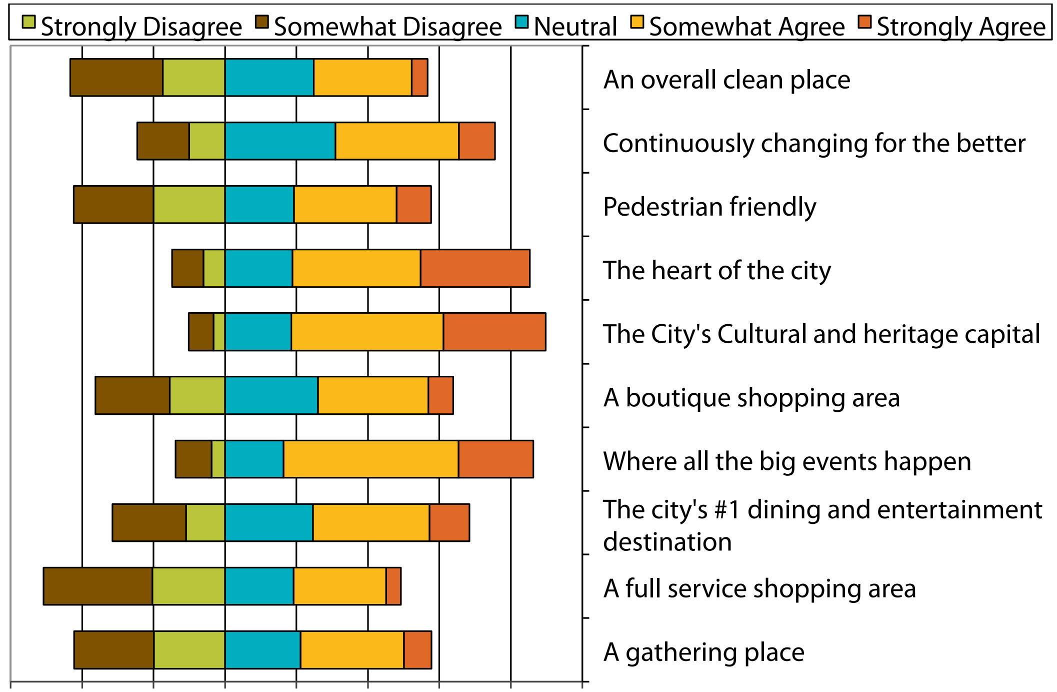


Figure 46: Perceptions of downtown (Table 42)

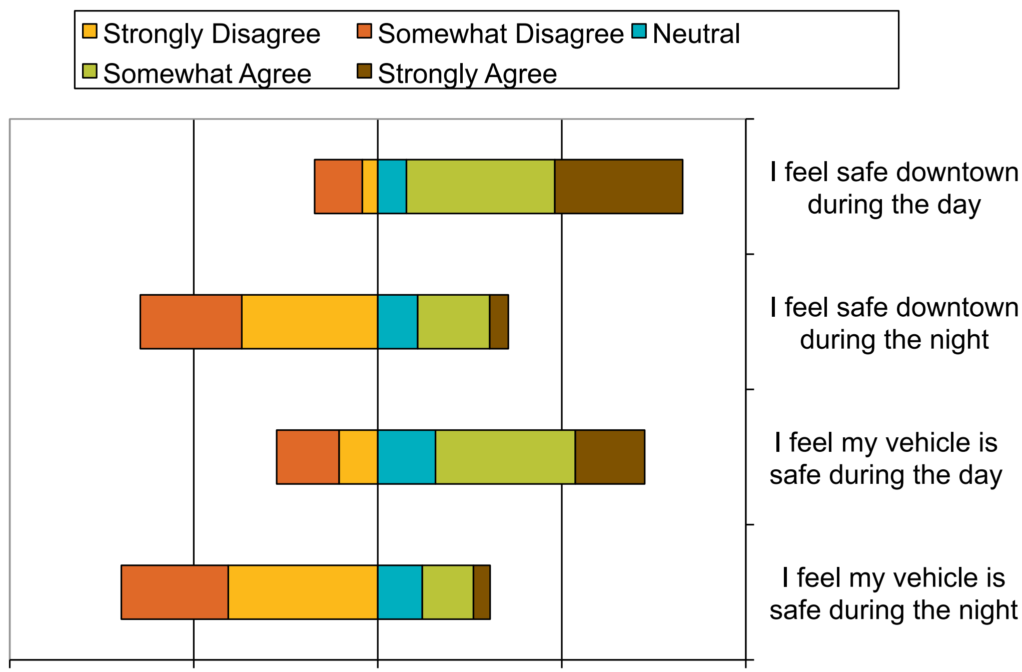


Figure 47: General perceptions of safety downtown (Table 43)

By place of residence, those respondents living downtown felt much safer downtown than those living farther away. 82% and 41% of downtown residents felt safe downtown during the day and night, respectively, while 72% and 16% of suburbanites felt safe (Figure 48).

When asked whether they would recommend downtown to their friends and family, respondents were generally quite positive. ***Dining and entertainment services*** would be recommended by over half of all respondents (59% and 59% respectively), ***professional services*** (generally legal or medical services) were less popular, with 38% of respondents recommending them, followed by ***shopping*** (28 %), and ***everyday services*** (25%)(Figure 49).

In general, downtown residents were more enthusiastic supporters of doing business downtown, from 20% more likely to recommend ***everyday services*** to 6% more likely to recommend ***professional services***, as compared to suburbanites. Interestingly, downtown residents were 1% less likely to recommend ***shopping downtown*** as compared to those living near downtown.

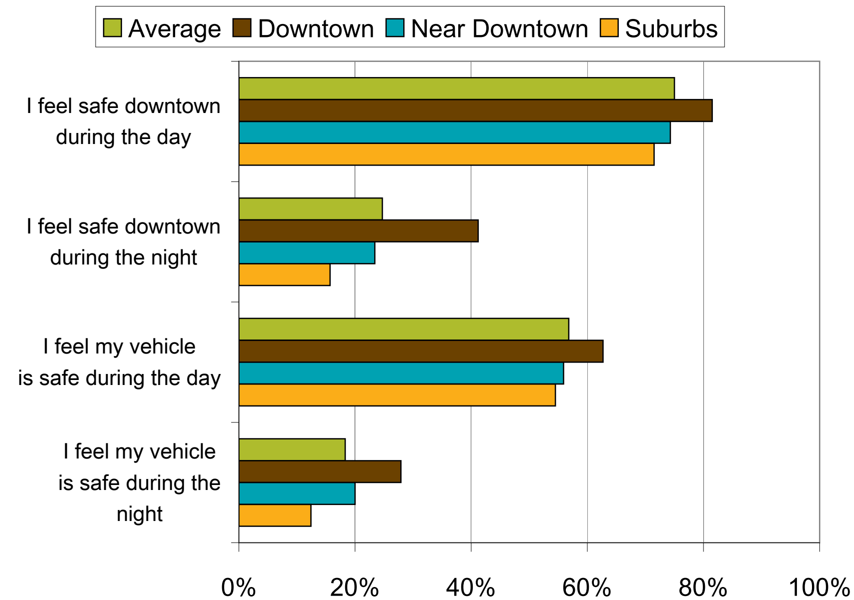


Figure 48: Perceptions of safety by home area (Table 44)

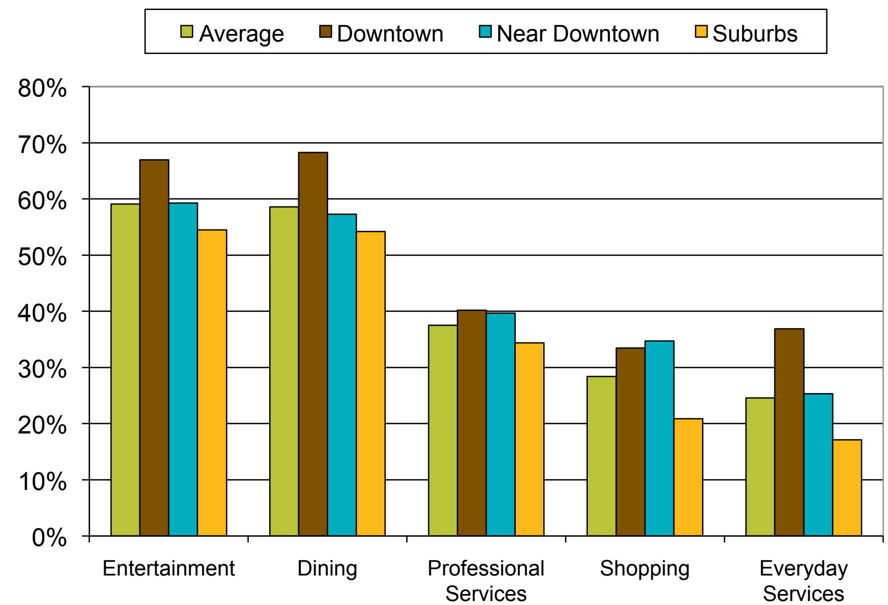


Figure 49: Likelihood of recommending downtown to friends & family (Table 45)

v. Downtown Initiatives & Advertisement

Newspapers were the most effective way of communicating events. On average, 54% of respondents learned of events downtown through ***newspapers***. The next most important sources of information were ***word of mouth*** (48%), ***radio*** (41%), ***the Internet*** or a website (40%), ***posters and flyers*** (35%), ***television*** (35%), and ***email newsletters*** (32%). ***Social networking sites*** and ***magazines*** scored poorly, reaching just 12% and 10% respectively.

There was some variation in the effectiveness of media by area of residence. ***Word of mouth*** for downtown residents was very important, surpassing ***newspapers*** (56% and 55% respectively). ***Posters*** were also much more useful for downtown residents (reaching 48%), as were ***the Internet*** and specific ***social networking websites*** (reaching 43% and 19%, respectively)(Figure 50).

Awareness of downtown programs was generally quite high. Four of the six programs (***parking programs*** and the ***Downtown Spirit*** bus) had over 80% awareness in all three groups, with the ***Downtown Spirit*** having over 90% awareness. The ***Change for the Better*** program had the lowest level of awareness, with just 44% of all respondents knowing about it. The ***Blue Loonie*** program had moderate awareness, with 69% of all respondents knowing about it. Strangely, downtown residents seemed less likely to know about this program, with just 61% of respondents claiming knowledge, while 74% of respondents from the suburbs knew about it (Figure 51).

Use of these programs was, predictably, somewhat lower than awareness. ***Parking programs*** were used by approximately 60% of all respondents, with more use made by those living outside the downtown area. The ***Downtown Spirit*** bus was used by 42% of respondents, with 53% of downtown residents using the program, and 36% of suburbanites. The ***Blue Loonie*** program was used by 17% of respondents, and the ***Change for the Better*** program was used by 13% (Figure 52).

Awareness of downtown events was more varied than the downtown programs. The ***Out to Lunch*** concert series was known to 80% of all respondents, and the ***In for Lunch*** concert series was known to just over 64% of respondents. ***Chess in the Court*** and the ***City Lights Cruise*** were known to approximately 59% of respondents, ***Chess in the Park*** was known to 5% of respondents. ***Heart of the Holidays*** was known to 39% of respondents (Figure 53).

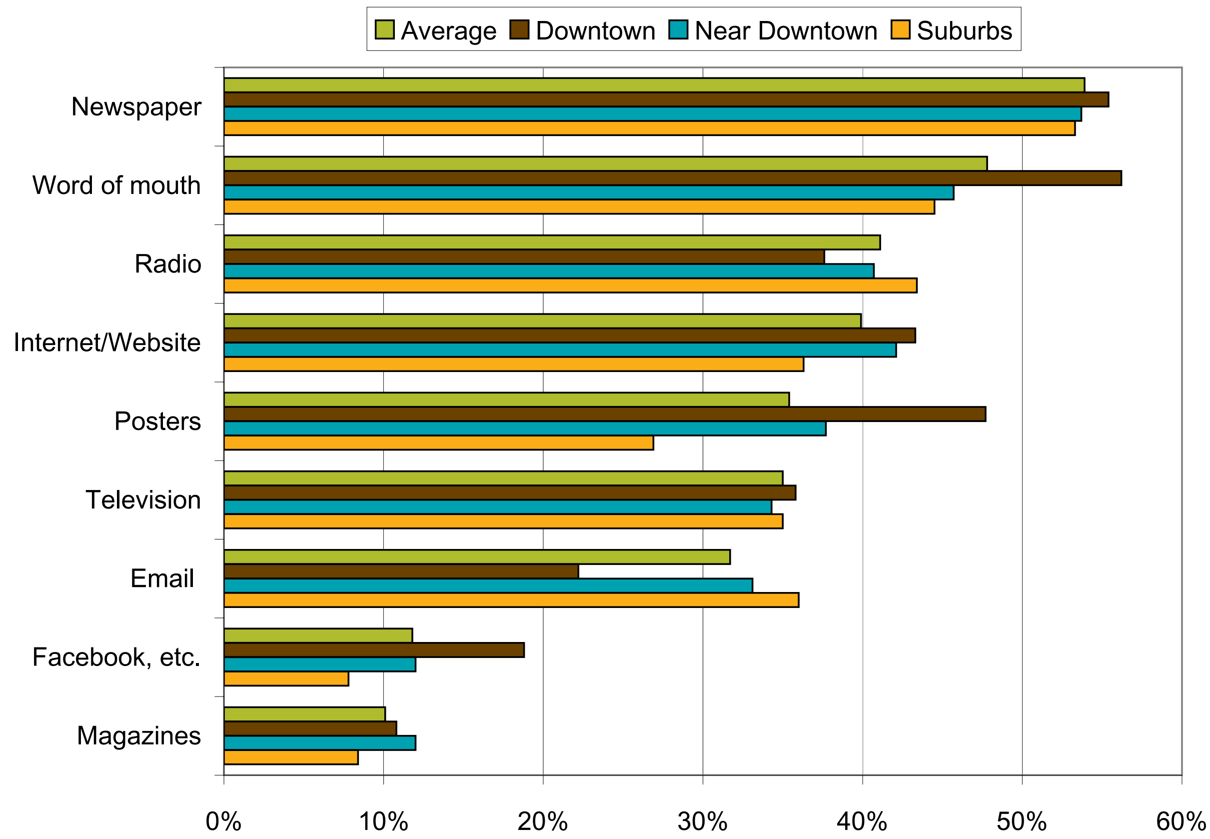


Figure 50: Media effectiveness (Table 46)

Attendance at the ***Out to Lunch*** concert was quite high, with 44% of respondents attending at least once. The ***In for Lunch*** concert series had 22% saying they had attended at least once. 12% of respondents had been to the ***City Lights Cruise***, the only event that was better attended by downtown residents than by suburbanites (18% vs. 10%). ***Heart of the Holidays*** had been attended by 10% of all respondents. ***Chess in the Court*** and ***Chess in the Park*** were attended by 6% and 4% of all respondents, respectively (Figure 54).

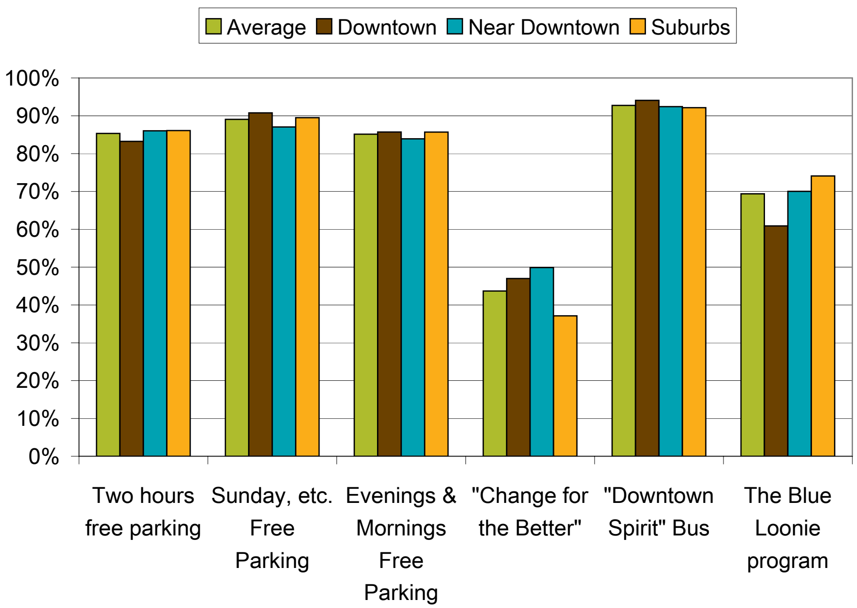


Figure 51: Awareness of downtown programs (Table 47)

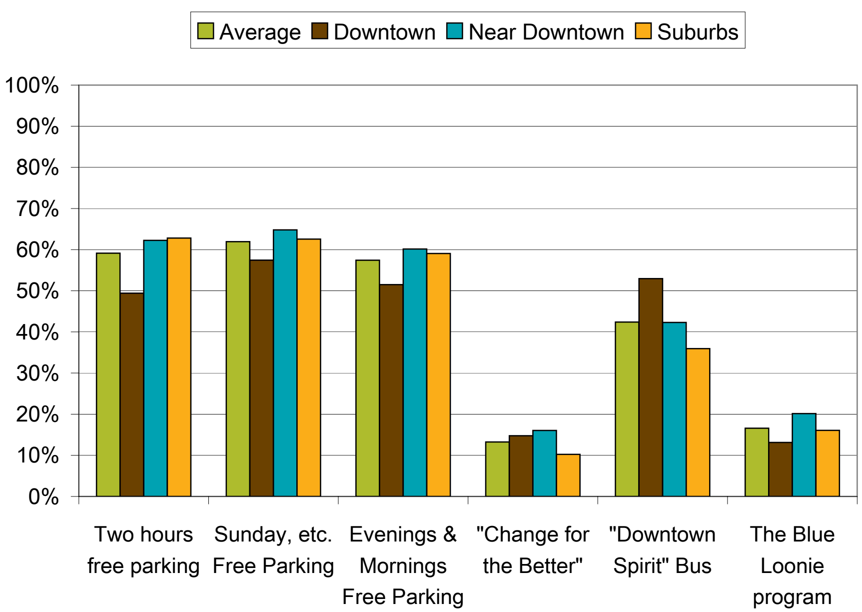


Figure 52: Use of downtown programs (Table 48)

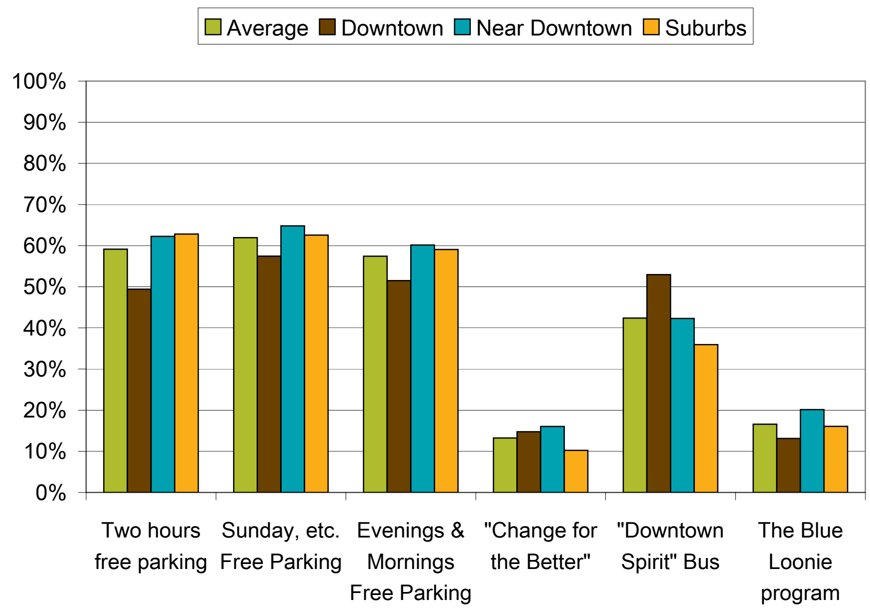


Figure 53: Awareness of downtown events (Table 49)

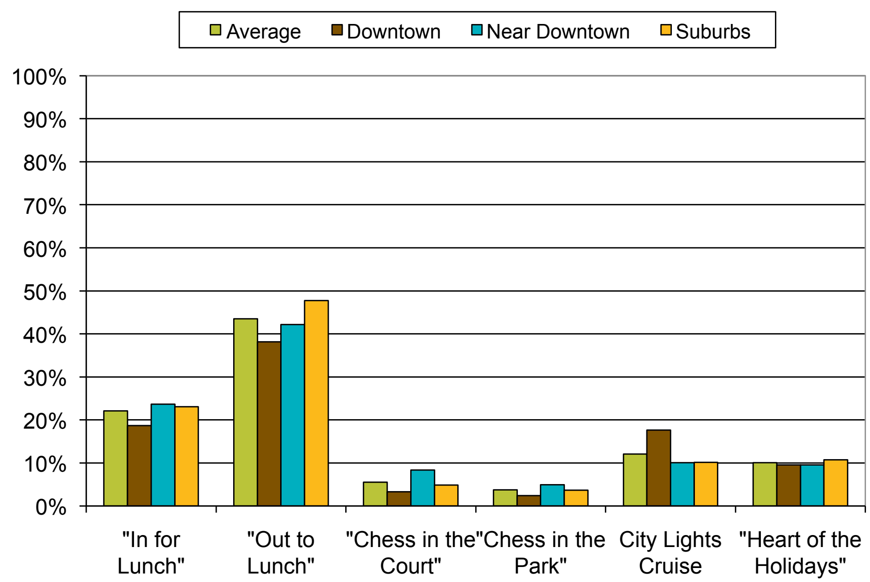


Figure 54: Attendance at downtown events (Table 50)

Awareness of BIZ programs seemed to be relatively consistent across place of residence, but varied a great deal by program. The ***Watch Ambassadors*** was the program with the most awareness at 92%, along with ***Art on the Avenue*** (83%), ***Clean Team*** (82%), and the ***BIZ website*** (81%). The ***Mission: Off the Streets Team*** (47%) and the ***Cigarette Anti-Butt program*** (30%) were the only two programs with less than 50% awareness (Figure 55).

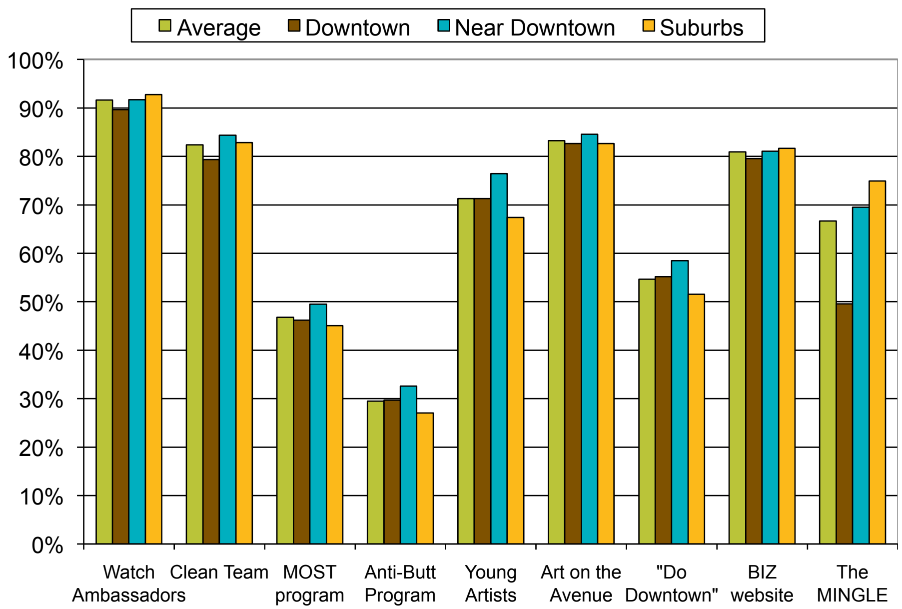


Figure 55: Somewhat or very familiar with BIZ initiatives (Table 51)

3.0 CONCLUSIONS AND REPORT SUMMARY

This report examined the opinions, behaviours, and needs of Winnipeg residents in relation to the downtown. The survey, constructed by the Downtown Winnipeg Biz, was distributed entirely online, and was completed by both downtown residents as well as those living outside of the downtown (either near downtown, or in the suburbs). Respondents were asked about a number of issues, including downtown dining, shopping, and entertainment, as well as their perceptions of downtown and awareness of downtown initiatives.

The first section of the report examined the demographics of all survey respondents. Of the 1583 people who completed the survey, one quarter lived downtown, and the majority (71%) worked downtown. 61% were female, and 37% were between the ages of 35-49. Roughly half of respondents were married, had at least one child, and earned $60,000 or more per year. 71% had a university or college education.

Downtown residents tended to be younger than the average respondent, with just over 40% between the ages of 25-34. They were slightly more likely to be male, and much less likely to be married or have children. Only 34% earned over $60,000 (34%), but 74% had a university or college education. 12% of downtown residents had moved to Winnipeg from another country.

The most popular reason for why respondents lived downtown was that they could walk to work, followed by being near downtown's shops and restaurants. Walking was the most popular way to get around downtown for all groups, followed by the bus for downtown residents and near downtown residents, and driving alone for those living in the suburbs.

The second section of the report examined the behaviours and needs of residents, including the purchase and frequency of use of various products and services. Not surprisingly, food purchases were most likely to be either coffee/ snacks, or lunch, for all respondents. Downtown residents were significantly more likely than any other group to purchase supper downtown at least once a week, however.

With respect to the value of expenditures in the downtown during the workday, 59% of respondents spent more than $10 per week on lunch, followed by supper (with 58% spending more than $10 per week). 31% spent more than $10 per week on coffee and snacks, and 16% spent more than $10 per week on breakfast.

Cafes, coffee shops, and cafeterias were the most popular restaurant type among all three resident groups, followed by casual/bistro, and Chinese, Thai, and Japanese.

A large section of the report was dedicated to downtown shopping habits. On average, the most popular days for shopping downtown tended to be Thursdays and Fridays, while the weekends were least popular. This was not the case for downtown residents, who preferred to shop Friday and Saturdays, and were more likely to shop on Sunday than any other group.

Not surprisingly, downtown residents were the only respondents who showed a high frequency of shopping after work hours, while all other groups favoured shopping at lunchtime.

Of all downtown shopping destinations, Portage Place was the most popular, followed by CityPlace, The Forks, Winnipeg Square, Portage Avenue, the Exchange District, and finally Graham Mall. Across the board, downtown residents were more likely to frequent downtown shopping areas than those living near downtown or in the suburbs.

In exploring the products used and needed in the downtown, it was noted that clothing purchases and drugstore items ranked highest, while flowers/plant purchases and fabrics ranked lowest. Not surprisingly, downtown residents were much more likely to purchase groceries downtown than either of the non-downtown resident groups. They were also more likely to access most services.

On average, services most often accessed outside of downtown were banks, medical services, and hair salons, while products most often purchased outside of downtown were groceries, clothes, and shoes.

The need for more grocery stores downtown was clear; while 44% of all respondents reported shopping for groceries downtown at least once a month, 96% shopped for groceries outside of downtown at least once a month.

When asked whether they would purchase various services/products if they were available downtown, 39% of all respondents said yes, while 66% of downtown residents said the same. Only 7% of downtown residents responded no, compared to 16% of those living near downtown, and 26% of those living in the suburbs. This suggests that downtown residents are in need of additional services and products that could also be of use to those living outside of the downtown.

In terms of attending downtown entertainment at least once a month, downtown residents were most likely to attend cultural events and destinations such as the Manitoba Opera, the Royal Winnipeg Ballet, and the Winnipeg Art Gallery. Those living in the suburbs were more likely to attend family events, such as MTYP, as well as major events, such as those held at the Convention Centre and the Centennial Concert Hall.

Changing negative perceptions of the downtown remains a challenge, however opinions do seem to be moving in a positive direction. Results suggest that respondents see the downtown as a destination for major events, the city's cultural and heritage capital, and the heart of the city, but do not see the downtown as a full service shopping area, an overall clean place, or as pedestrian friendly.

Safety remains an ongoing policy challenge for the downtown, as while most respondents generally felt safe during the day, this dropped off during the evening. When asked about perceptions of safety in the downtown, 75% of respondents indicated that they felt safe during the day. However, only 25% of respondents reported that they felt safe during the night. Downtown residents tended to feel safer downtown than those living further away, with 82% and 41% feeling safe during the day and night, respectively, while only 72% and 16% of those living in the suburbs felt safe. These numbers are somewhat encouraging in that they show a marked increase in perceptions of safety in the downtown since the Downtown Workers survey was completed in 2008.

Over half of respondents indicated they would recommend downtown dining and entertainment services to their friends and family, while only 28% would recommend shopping.

Newspapers were the most effective way of communicating downtown events, followed by word of mouth, radio, and the internet. For downtown residents, word of mouth surpassed newspapers as a way of communicating events, and posters, the internet, and social networking websites were more useful for downtown residents than for other groups.

The final area that was reviewed was program recognition in the downtown. The Downtown Spirit and various parking programs had over 80% awareness on average, while 69% of respondents were aware of the Blue Loonie program. "Change for the better" had only 44% awareness. Use of the programs, however, was somewhat lower than awareness.

In terms of downtown programs, 80% of respondents were aware of the Out to Lunch concert series, while 44% had attended at least once. 64% were aware of the In for Lunch concert series, while just 22% had attended. Attendance was lower for Heart of the Holidays (10%), Chess in the Court (6%), and Chess in the Park (4%).

The Watch Ambassadors had the highest awareness of all Biz programs (92%), along with Art on the Avenue (83%) and Clean Teams (82%). The Mission: Off the Streets Team (47%) and the Cigarette Anti-Butt program (30%) were the only two programs with less than 50% awareness.

Overall, the Downtown Residents Survey helped to understand some of the dynamics of the Winnipeg's downtown, particularly concerning the needs and behaviours of downtown residents. While perceptions of safety are improving, many still consider the downtown to be unsafe, particularly at night. The responses of downtown residents expressed a need for more options for shopping in the downtown, and particularly grocery shopping. Few living outside of the downtown shop there in the evenings or on weekends, showing a reluctance to return downtown outside of work hours unless for a major event.

While awareness of various downtown events and BIZ programs was quite high, attendance/participation in these events and programs was significantly lower. More work is needed to reinforce the growing perception that the downtown is safe, as well as to provide a wider range of products and services, for both downtown residents as well as those who live outside of the downtown.

APPENDIX

Table 1 – Home area of respondents

Region	Sample Proportion
Downtown	24.5%
Near downtown	31.6%
Suburbs	36.7%
Out of town	7.1%

Table 2 – Gender split of respondents by home area

Gender	Average	Downtown	Near Downtown	Suburbs
Female	61.0%	58.3%	63.6%	60.9%
Male	39.0%	41.7%	36.4%	39.1%

Table 3 – Age of respondents

Age	Average	Downtown	Near Downtown	Suburbs and older
Under 18	0.4%	0.0%	0.7%	0.4%
18-24 years	7.8%	9.2%	11.1%	4.5%
25-34 years	25.7%	41.1%	25.3%	16.5%
35-49 years	37.4%	29.6%	35.6%	43.3%
50-64 years	26.3%	16.9%	24.8%	33.1%
65 years and older	2.5%	3.3%	2.5%	2.2%

Table 4 – Marital status of respondents

Marital status	Average	Downtown	Near Downtown	Suburbs
Married/Common-law	55.3%	35.0%	52.1%	70.1%
Single	44.7%	65.0%	47.9%	29.9%

Table 5 – Household income of respondents

Income level	Average	Downtown	Near Downtown	Suburbs and older
Under $10,000	3.7%	4.7%	5.2%	2.0%
$10,000 to $29,999	11.7%	22.4%	13.9%	3.2%
$30,000 to $49,999	22.2%	29.3%	25.7%	15.0%
$50,000 to $59,999	11.2%	9.3%	13.9%	10.5%
$60,000 to $74,999	14.6%	12.5%	13.6%	16.8%
$75,000 and over	36.6%	21.8%	27.6%	52.7%

Table 6 – Education background of respondents

Highest education attained	Average	Downtown	Near Downtown	Suburbs
Grade School / Some High School	1.7%	1.8%	3.3%	0.5%
Completed High School	17.0%	15.8%	17.3%	17.5%
Technical / Vocational School	10.1%	8.0%	9.3%	12.0%
University / College	71.2%	74.4%	70.3%	69.9%

Table 7 – Profession of respondent

Profession	Average	Downtown	Near Downtown	Suburbs
Government	19.5%	17.3%	18.1%	21.7%
Professional	19.1%	18.3%	14.2%	23.2%
Administration	13.5%	9.9%	15.9%	13.9%
Management	11.4%	6.7%	9.6%	15.4%
Media/Communications	7.6%	8.1%	8.2%	6.8%
Education/Research	6.4%	9.2%	7.9%	3.7%
Student	4.7%	8.5%	5.7%	1.8%
Medical	3.7%	6.7%	3.1%	2.5%
Hospitality/Restaurant	3.7%	3.2%	4.5%	3.5%
Retail	3.0%	3.9%	4.0%	1.8%
Production	2.1%	2.1%	1.7%	2.5%
Law	2.0%	2.8%	1.7%	1.8%
Social Services	2.0%	2.1%	3.1%	1.0%
Artist/Musician/Writer	1.2%	1.4%	2.3%	0.4%

Table 8 – Presence of children

Presence of children	Average	Downtown	Near Downtown	Suburbs
Have Children	50.2%	25.2%	47.6%	67.5%
No Children	49.8%	74.8%	52.4%	32.5%

Table 9 – Number of children

Ethnicity	Average	Downtown	Near Downtown	Suburbs
1 child	28.9%	41.3%	31.4%	25.0%
2 children	46.7%	34.7%	45.1%	50.0%
3 children	18.1%	17.3%	16.6%	19.0%
4 children	4.5%	2.7%	4.6%	4.9%
5 children	1.5%	4.0%	2.3%	0.6%
6 children	0.2%	0.0%	0.0%	0.3%
8 children	0.2%	0.0%	0.0%	0.3%

Table 10 – Ethnic background of respondents

Ethnicity	Average	Downtown	Near Downtown	Suburbs
Aboriginal	7.4%	8.2%	11.0%	4.5%
African	0.8%	1.6%	0.3%	0.8%
Asian	7.2%	8.8%	7.0%	6.4%
Caucasian	83.6%	80.8%	79.9%	87.8%
Latin American	1.0%	0.6%	1.9%	0.6%

Table 11 – Origin story of respondent

Origin story	Average	Downtown	Near Downtown	Suburbs
I was born and raised in Winnipeg.	41.1%	35.1%	43.5%	42.8%
I moved to Winnipeg from another city in Manitoba.	17.1%	22.4%	15.0%	15.7%
I moved to Winnipeg from another Canadian province.	14.9%	17.8%	15.2%	13.1%
I moved to Winnipeg from another country.	8.3%	11.9%	7.4%	7.1%

Table 12 – Popularity of downtown transportation options

Transportation option	Average	Downtown	Near Downtown	Suburbs
Walk	59.1%	78.6%	56.5%	50.1%
Bus	37.7%	40.2%	44.7%	31.1%
Bicycle	9.3%	14.2%	14.6%	2.7%
Drive alone	32.4%	21.6%	30.7%	39.6%
Carpool	10.2%	5.2%	9.0%	13.8%
Taxi	5.7%	13.9%	4.2%	2.2%

Table 13 – Proportion of respondents working downtown

Work downtown	Average	Downtown	Near Downtown	Suburbs
Percentage of resident category who work downtown	70.5%	62.1%	66.3%	78.8%

Table 14 – Tenure type of downtown residents

Tenure	Sample Proportion
Rent	86.1%
Own	13.8%

Table 15 – Length of time living downtown

Months living Downtown	Respondents
0 – 6 months	43
7 – 12 months	41
1 to 2 years	63
2 to 5 years	106
Over 5 years	119

Table 16 – Median and average time of residence downtown

Duration of Downtown Residence	
Median Duration	36 months
Average Duration	65.9 months

Table 17 – Reasons for living downtown

Reason for living downtown	Respondents Agreeing
It is Affordable	9.1%
I want to be near entertainment, arts and culture like the theatre, sports and ballet	11.3%
I want to be near the nightlife, such as bars and clubs	5.2%
I like loft living	3.5%
I can walk to work	14.3%
I like the pedestrian environment	10.8%
I like being near downtown's shops and restaurants	14.0%

Table 18 – Family income, education and age comparison of survey sample to 2006 Census

Comparison categories	Census 2006	BIZ Survey Results
Without children	85.2%	74.8%
With children	14.8%	25.2%
under 30k	57.8%	27.1%
30-60k	32.5%	38.6%
60K+	12.0%	34.3%
Grade School / Some High School	21.7%	1.8%
Completed High School	29.6%	15.8%
Technical / Vocational School	10.3%	8.0%
University / College	38.3%	74.4%
18-24 years	20.0%	9.2%
25-34 years	28.6%	41.1%
35-49 years	29.7%	29.6%
50-64 years	21.6%	16.9%

Table 20 – Average weekly breakfast expenditures

Breakfast Expenditures	Average	Downtown	Near Downtown	Suburbs
Nothing or <$1	45.9%	38.3%	44.1%	51.9%
$1 to $9	38.0%	40.0%	40.0%	35.3%
$10 to $29	14.3%	18.9%	14.4%	11.4%
$30 to $49	1.2%	1.7%	1.2%	0.9%
More than $50	0.6%	1.1%	0.2%	0.5%

Table 21 – Average weekly coffee & snack expenditures

Coffee & Snacks Expenditures	Average	Downtown	Near Downtown	Suburbs
Nothing or <$1	15.1%	11.9%	14.2%	17.6%
$1 to $9	54.1%	47.9%	54.8%	57.2%
$10 to $29	27.2%	34.1%	28.8%	22.0%
$30 to $49	2.9%	5.0%	2.1%	2.2%
More than $50	0.8%	1.1%	0.2%	1.0%

Table 22 – Average weekly lunch expenditures

Lunch Expenditures	Average	Downtown	Near Downtown	Suburbs
Nothing or <$1	12.8%	12.6%	13.1%	12.7%
$1 to $9	28.1%	26.8%	27.8%	29.2%
$10 to $29	43.6%	44.8%	44.5%	42.2%
$30 to $49	11.6%	11.2%	11.5%	11.9%
More than $50	3.9%	4.6%	3.2%	4.1%

Table 23 – Average weekly supper expenditures

Supper Expenditures	Average	Downtown	Near Downtown	Suburbs
Nothing or <$1	30.2%	12.3%	31.1%	41.3%
$1 to $9	12.0%	14.5%	13.0%	9.6%
$10 to $29	30.1%	39.3%	30.1%	23.9%
$30 to $49	16.0%	18.9%	18.1%	12.7%
More than $50	11.7%	15.0%	7.7%	12.5%

Table 24 – Popularity of restaurant type

Restaurant types	Average	Downtown	Near Downtown	Suburbs
Cafe/Coffee Shops/Cafeterias	78.5%	77.8%	80.8%	77.2%
Casual/Bistro	57.2%	55.2%	57.3%	58.2%
Chinese, Thai, Japanese	53.5%	55.7%	54.7%	51.4%
Fine Dining	27.5%	26.8%	25.3%	29.5%
Indian	22.3%	28.6%	23.4%	18.0%
Other Asian	14.3%	16.5%	16.4%	11.7%
Other Ethnic Restaurants	14.6%	18.0%	16.4%	11.4%
Pub/Bar	42.8%	48.7%	41.7%	40.2%

Table 25 – Popularity of fast food type

Restaurant types	Average	Downtown	Near Downtown	Suburbs
Burger	57.7%	58.8%	55.5%	58.6%
Chinese, Thai, Japanese	45.6%	42.5%	44.1%	48.4%
Indian	10.4%	10.1%	10.8%	10.2%
Juice or a sandwich	52.2%	48.5%	55.3%	52.2%
Other Asian	8.5%	7.7%	9.8%	8.1%
Other Ethnic Restaurants	6.8%	7.2%	7.2%	6.3%
Pizza	47.3%	53.9%	48.3%	42.8%

Table 26 – Frequency of shopping by day of week

Days of the week typically shopping downtown	Average	Downtown	Near Downtown	Suburbs
Monday	45.9%	44.8%	45.5%	46.8%
Tuesday	47.9%	43.6%	46.1%	51.6%
Wednesday	50.7%	46.9%	48.5%	54.5%
Thursday	53.6%	48.5%	52.7%	57.1%
Friday	58.3%	57.2%	57.7%	59.4%
Saturday	33.2%	62.1%	34.3%	16.3%
Sunday	15.5%	35.3%	12.0%	7.1%

Table 27 – Frequency of shopping by time of day

Time of day typically shopping downtown	Average	Downtown	Near Downtown	Suburbs
Morning/before work	4.9%	6.7%	6.0%	3.0%
Mid-morning	19.0%	22.7%	21.0%	15.4%
Lunchtime	51.7%	31.4%	51.9%	62.8%
Mid-afternoon	33.7%	44.3%	35.9%	26.2%
Late afternoon/after work	33.7%	55.7%	35.9%	19.9%
Evening	13.3%	29.1%	12.2%	5.3%

Table 28 – Popularity of downtown shopping areas

Shopping Area	Average	Downtown	Near Downtown	Suburbs
Portage Place	66.8%	75.0%	68.3%	61.2%
CityPlace	49.5%	61.3%	45.5%	45.8%
The Forks	44.2%	51.5%	45.1%	39.3%
Winnipeg Square	39.4%	42.0%	37.9%	39.0%
Portage Avenue	23.8%	27.1%	26.3%	20.2%
Exchange District	23.8%	32.2%	27.5%	16.4%
Graham Mall	15.8%	19.6%	19.4%	11.1%

Table 29 – Shopping destination outside of downtown popularity

Shopping destinations	Average	Downtown	Near Downtown	Suburbs
Polo Park Shopping Centre	56.9%	68.3%	58.9%	49.1%
St.Vital	43.2%	37.6%	39.7%	48.8%
Osborne Village	34.6%	58.2%	38.3%	18.6%
Grant Park	30.6%	28.9%	35.7%	28.0%
South Winnipeg	26.0%	14.7%	21.6%	35.4%
Kildonan Place	25.0%	18.8%	23.2%	29.7%
Corydon	22.9%	30.7%	28.1%	14.8%
Academy	12.9%	11.1%	17.4%	10.7%
Garden City	12.2%	11.1%	13.2%	12.1%
River Heights	9.9%	5.9%	14.8%	8.5%

Table 30 – Popularity of downtown products

Product categories	Average	Downtown	Near Downtown	Suburbs
Clothes	50.6%	55.4%	52.5%	46.5%
Drugstore/Pharmacy Items	49.6%	62.4%	44.3%	46.3%
Shoes	30.6%	30.4%	34.5%	28.0%
Groceries	29.9%	65.5%	23.6%	14.6%
Books & Magazines	23.1%	25.8%	23.8%	21.2%
Office Supplies	23.0%	21.4%	25.7%	21.9%
Special Occasion Cards	21.8%	15.5%	20.4%	26.4%
Holiday Gifts	20.3%	14.2%	19.4%	24.4%
Bargain-type Products	20.0%	24.5%	21.4%	16.6%
Cosmetics	19.7%	18.3%	20.8%	19.7%
CDs/DVDs	19.5%	22.7%	20.6%	16.9%
Jewellery & accessories	15.5%	13.1%	15.8%	16.7%
Bath & Body Products	13.6%	19.1%	13.6%	10.7%
Health Foods	9.0%	11.3%	9.8%	7.1%
Specialty Foods	7.6%	9.5%	8.8%	5.8%
Electronics	6.6%	6.2%	8.2%	5.8%
Toys & Games	6.5%	6.4%	8.4%	5.2%
Sporting Goods	6.2%	4.9%	7.2%	6.2%
Holiday Decorations & Supplies	5.7%	6.7%	5.0%	5.8%
Home Accessories	5.2%	7.7%	4.8%	4.0%
Art Supplies & Artwork	4.5%	5.9%	4.2%	3.9%
Hobby / Craft Items	4.4%	4.9%	5.4%	3.5%
Telecommunications	4.0%	3.9%	3.2%	4.8%
Hobby/Craft Items	3.7%	4.1%	5.0%	2.4%
Home Furnishings	3.0%	3.6%	3.0%	2.6%
Flowers & Plants	2.5%	3.4%	2.0%	2.3%
Fabric	2.2%	1.8%	3.4%	1.6%

Table 31 – Popularity of products purchased outside downtown

Product categories	Average	Downtown	Near Downtown	Suburbs
Groceries	64.4%	59.8%	62.1%	68.6%
Clothes	61.3%	61.9%	59.1%	62.5%
Shoes	39.4%	41.5%	36.1%	40.6%
Home Electronics	32.9%	35.1%	31.9%	32.4%
Drugstore/Pharmacy Items	27.4%	14.7%	28.9%	33.4%
Home Furnishings	23.1%	25.0%	21.8%	23.1%
Books & Magazines	22.2%	21.6%	25.0%	20.6%
Home Accessories	20.3%	22.4%	18.6%	20.3%
CDs/DVDs	17.1%	14.7%	18.6%	17.4%
Sporting Goods	16.5%	11.6%	17.0%	18.9%
Bath & Body Products	15.9%	13.9%	16.8%	16.4%
Cosmetics	15.0%	13.9%	13.8%	16.4%
Bargain-Type Products	14.6%	9.3%	15.8%	16.7%
Holiday Gifts	13.8%	13.1%	13.0%	14.8%
Specialty Foods	13.0%	16.5%	15.0%	9.5%
Toys & Games	11.6%	8.8%	12.2%	12.8%
Flowers & Plants	10.5%	7.5%	12.2%	11.0%
Jewellery & Accessories	10.3%	11.1%	12.4%	8.4%
Health Foods	9.4%	10.6%	10.4%	8.1%
Hobby/Craft Items	8.2%	8.2%	10.0%	6.9%
Special Occasion Cards	7.5%	3.4%	7.8%	9.5%
Office Supplies	7.2%	4.1%	7.2%	8.9%
Telecommunications	6.2%	5.9%	6.6%	6.1%
Holiday Decorations & Supplies	6.2%	3.6%	6.4%	7.5%
Fabric	4.6%	4.1%	6.0%	3.9%
Art Supplies & Artwork	4.5%	4.4%	6.6%	3.2%
Antiques	2.0%	2.1%	2.6%	1.4%

Table 32 – Popularity of downtown services

Service categories	Average	Downtown	Near Downtown	Suburbs
Banks	69.7%	80.2%	71.1%	63.0%
Postal Services	49.1%	58.8%	48.5%	44.2%
Medical	30.1%	30.4%	28.1%	31.3%
Hair salons	22.6%	35.8%	19.2%	17.6%
Optician/optical	19.3%	16.8%	22.8%	18.2%
Fitness club	17.0%	27.6%	15.2%	12.4%
Alterations/tailoring	13.2%	17.0%	10.4%	13.1%
Education	12.8%	14.2%	14.0%	11.1%
Shoes	11.0%	7.5%	9.6%	14.0%
Photofinishing	8.1%	7.5%	11.4%	6.2%
Spa	7.7%	9.8%	7.2%	6.9%
Massage	7.6%	8.8%	6.8%	7.5%
Wireless access	6.5%	10.3%	5.4%	5.2%
Cleaners	6.0%	11.6%	4.8%	3.7%
Church	5.4%	9.5%	6.0%	2.6%
Chiropractors	4.0%	4.6%	3.6%	3.9%
Printers	3.9%	6.2%	4.2%	2.4%
Physiotherapy	3.4%	5.7%	2.4%	2.9%
Framing	2.8%	3.9%	3.4%	1.7%

Table 33 – Popularity of services purchased outside downtown

Services categories	Average	Downtown	Near Downtown	Suburbs
Banks	44.5%	24.2%	45.9%	54.8%
Medical	37.5%	35.6%	36.1%	39.6%
Hair Salons	35.6%	28.4%	37.5%	38.2%
Postal Services	22.2%	8.0%	24.8%	28.2%
Massage Therapists	20.5%	16.0%	21.2%	22.5%
Optical	19.7%	14.7%	21.4%	21.3%
Cleaners	19.3%	9.3%	20.4%	24.1%
Fitness Facilities	18.8%	11.9%	19.6%	22.2%
Church	17.0%	12.4%	18.8%	18.3%
Photofinishing	14.6%	12.1%	14.6%	16.0%
Chiropractors	13.8%	10.1%	15.6%	14.6%
Spa	9.3%	8.5%	10.4%	8.9%
Physiotherapist	8.6%	7.0%	8.4%	9.7%
Education & Training	7.8%	9.0%	9.6%	5.8%
Alterations	7.3%	4.9%	9.4%	7.2%
Shoe Repair	6.6%	5.4%	9.0%	5.6%
Wireless Cafe	2.9%	1.8%	4.4%	2.4%
Framing	2.5%	1.8%	2.6%	2.7%
Printers	2.2%	1.8%	3.2%	1.7%

Table 34 – Respondents willing to shop downtown if services/products were available there

Willingness to shop downtown	Average	Downtown	Near Downtown	Suburbs
No	18.0%	7.0%	16.0%	26.0%
Yes	39.0%	66.0%	38.0%	23.0%
Maybe	37.0%	22.0%	40.0%	43.0%
Don't Know	7.0%	6.0%	6.0%	8.0%

Table 35 – Grocery shopping destination preferences

Grocery location	Average	Downtown	Near DT	Suburbs
Downtown	44.2%	82.3%	39.0%	24.9%
Outside of Downtown	96.2%	88.9%	98.4%	99.0%

Table 36 – Popularity of city areas as grocery shopping destinations

Grocery location	Average	Downtown	Near DT	Suburbs
Polo Park	23.6%	42.0%	27.7%	10.4%
St.Vital	18.8%	16.2%	18.2%	20.7%
River Heights/Tuxedo/Grant Avenue	14.6%	14.7%	19.2%	11.2%
Kenaston/Fort Garry	15.3%	13.1%	11.0%	19.6%
McPhillips	10.2%	8.2%	12.4%	9.7%

Table 37 – Popularity of grocery stores outside of downtown

Grocery stores	Average	Downtown	Near DT	Suburbs
Safeway	58.5%	52.6%	62.5%	58.9%
Sobeys	42.1%	29.1%	35.1%	54.5%
Superstore	60.5%	60.6%	60.5%	60.5%
Food Fare	6.7%	4.4%	10.8%	5.0%
Price Chopper	9.0%	6.4%	11.6%	8.6%
Independent Grocer	7.6%	6.2%	11.0%	6.1%
Specialty Food Store	11.7%	13.1%	15.0%	8.6%

Table 38 – Monthly or better attendance at entertainment venues

Entertainment option	Average	Downtown	Near Downtown	Suburbs
Visit a gallery	19.8%	25.5%	25.6%	12.2%
Attend a concert	45.0%	51.1%	44.7%	41.7%
Attend the theatre	30.6%	34.7%	32.8%	26.4%
Attend a sporting event	29.6%	29.1%	27.4%	31.5%
Attend a community event or festival	32.5%	49.2%	35.0%	20.4%
Attend a movie	37.3%	51.2%	41.9%	25.5%
Visit a night club	22.4%	35.0%	23.0%	14.1%

Table 39 – Respondents having visited downtown destinations in past year

Event/venue option	Average	Downtown	Near Downtown	Suburbs
Manitoba Opera	11.3%	13.4%	12.5%	9.1%
Royal Winnipeg Ballet	20.8%	22.0%	21.2%	19.8%
Prairie Theatre Exchange	20.3%	20.5%	22.3%	18.8%
Manitoba Theatre for Young People	11.6%	9.0%	13.7%	11.7%
Winnipeg's Contemporary Dancers	6.9%	10.2%	9.2%	3.2%
Winnipeg Convention Centre	52.5%	46.9%	50.2%	57.6%
MTS Centre	51.1%	49.3%	53.8%	50.3%
Winnipeg Symphony Orchestra	20.7%	19.9%	23.6%	18.9%
Manitoba Moose	32.9%	31.0%	27.9%	37.7%
Winnipeg Goldeyes	35.0%	28.9%	32.1%	40.9%
Manitoba Theatre Centre	23.9%	27.0%	24.1%	21.8%
MTC Warehouse	16.0%	20.2%	16.4%	13.1%
Other Centennial Concert Hall performance	35.6%	31.5%	35.5%	38.1%
Winnipeg Art Gallery	41.3%	44.1%	42.7%	38.6%
Manitoba Museum	39.8%	39.2%	39.3%	40.6%
Manitoba Children's Museum	23.9%	20.5%	22.0%	27.4%
Winnipeg Chinese Cultural Centre	6.8%	7.4%	7.1%	6.2%
The Forks	29.4%	18.8%	28.0%	36.7%
Manitoba Legislative Building	37.3%	38.9%	38.2%	35.6%
Union Station	27.5%	28.6%	26.2%	27.9%
Upper Fort Garry Gate	18.8%	25.2%	18.1%	15.4%
Costume Museum of Canada	8.2%	10.4%	9.0%	6.4%
Dalnavert	7.9%	9.3%	7.8%	7.1%
Manitoba Sports Hall of Fame	8.0%	6.1%	8.4%	9.0%

Table 40 – Monthly or better attendance at downtown cinemas

Downtown theatre	Average	Downtown	Near Downtown	Suburbs
Any theatre	35.2%	48.6%	42.0%	22.1%
The Globe Cinema	21.2%	32.4%	25.2%	11.5%
IMAX Theatre	16.0%	19.8%	16.6%	13.2%
Towne 8 Cinema	15.2%	27.5%	19.3%	4.8%
Cinematheque	7.5%	12.0%	9.6%	3.1%

Table 41 – Monthly or better attendance at theatres outside of downtown

Outside of downtown theatre	Average	Downtown	Near Downtown	Suburbs
Cinema City McGillivray	24.9%	17.5%	24.5%	29.8%
Cinema City Northgate	9.9%	8.5%	13.8%	7.9%
Empire Grant Park 8 Cinemas	28.6%	29.4%	32.3%	25.2%
Garden City	3.6%	3.0%	4.9%	3.0%
Kildonan Place	8.4%	2.5%	9.5%	11.3%
Silver City Polo Park	45.1%	54.0%	46.4%	38.6%
Silver City St.Vital	29.0%	21.4%	29.7%	33.2%
The Theatre Project	0.4%	0.3%	0.5%	0.4%

Table 42 – Respondent agreement with perceptions of downtown statements

Perceptions of downtown	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
A gathering place	19.9%	22.3%	21.1%	29.0%	7.7%
A full service shopping area	20.4%	30.4%	19.2%	25.9%	4.1%
The city's #1 dining and entertainment destination	10.9%	20.6%	24.6%	32.6%	11.2%
Where all the big events happen	3.8%	10.0%	16.4%	49.0%	20.9%
A boutique shopping area	15.5%	20.8%	26.0%	30.9%	6.9%
The City's Cultural and heritage capital	3.2%	7.0%	18.6%	42.5%	28.7%
The heart of the city	6.0%	8.8%	18.9%	35.9%	30.5%
Pedestrian friendly	20.0%	22.4%	19.3%	28.7%	9.7%
Continuously changing for the better	10.1%	14.5%	30.9%	34.6%	10.1%
An overall clean place	17.4%	25.9%	24.8%	27.5%	4.4%

Table 43 – Perceptions of safety downtown (differences from 2008 survey)

Perceptions of safety	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
I feel safe downtown during the day	4.2%	13.0%	7.8%	40.3%	34.7%
	(-1.7%)	(-1.4%)	(-2.7%)	(+2.5%)	(+3.3%)
I feel safe downtown during the night	36.9%	27.6%	10.8%	19.6%	5.1%
	(-5.0%)	(+0.4%)	(+1.1%)	(+3.2%)	(+0.5%)
I feel my vehicle is safe during the day	10.5%	17.0%	15.7%	38.0%	18.8%
	(-1.0%)	(-2.3%)	(+0.1%)	(+1.5%)	(+1.6%)
I feel my vehicle is safe during the night	40.6%	29.1%	12.1%	13.9%	4.5%
	(+3.8%)	0.0%	(+1.5%)	(+1.6%)	(+1.7%)

Table 44 – Perceptions of safety downtown by home area

Perceptions of safety	Average	Downtown	Near Downtown	Suburbs
I feel safe downtown during the day	75.0%	81.5%	74.3%	71.5%
I feel safe downtown during the night	24.7%	41.2%	23.4%	15.7%
I feel my vehicle is safe during the day	56.8%	62.7%	55.9%	54.5%
I feel my vehicle is safe during the night	18.3%	27.9%	20.0%	12.4%

Table 45 – Respondents willing to recommend downtown

Downtown recommendations	Average	Downtown	Near Downtown	Suburbs
Dining	58.6%	68.3%	57.3%	54.2%
Shopping	28.4%	33.5%	34.7%	20.9%
Entertainment	59.1%	67.0%	59.3%	54.5%
Professional Services (e.g. lawyers, doctors, etc)	37.5%	40.2%	39.7%	34.4%
Everyday Services (e.g. hairstyling, etc)	24.6%	36.9%	25.3%	17.1%

Table 46 – Respondent use of media for downtown information

BIZ media initiatives	Average	Downtown	Near Downtown	Suburbs
Newspapers	53.9%	55.4%	53.7%	53.3%
Magazines	10.1%	10.8%	12.0%	8.4%
Radio	41.1%	37.6%	40.7%	43.4%
Television	35.0%	35.8%	34.3%	35.0%
Internet/Website	39.9%	43.3%	42.1%	36.3%
Social Networking website	11.8%	18.8%	12.0%	7.8%
Email newsletter	31.7%	22.2%	33.1%	36.0%
Posters Flyers	35.4%	47.7%	37.7%	26.9%
Word of mouth	47.8%	56.2%	45.7%	44.5%

Table 47 – Respondents aware of downtown programs

Downtown programs	Average	Downtown	Near Downtown	Suburbs
Two hours free parking	85.3%	83.2%	86.0%	86.1%
Sunday, etc. Free Parking	89.1%	90.8%	87.0%	89.5%
Evenings & Mornings Free Parking	85.1%	85.7%	83.9%	85.7%
Change for the Better	43.7%	47.0%	49.9%	37.1%
Downtown Spirit Bus	92.7%	94.1%	92.4%	92.2%
The Blue Loonie program	69.4%	60.9%	70.0%	74.1%

Table 48 – Respondents using downtown programs

Downtown programs	Average	Downtown	Near Downtown	Suburbs
Two hours free parking	59.1%	49.4%	62.3%	62.8%
Sunday, etc. Free Parking	61.9%	57.4%	64.8%	62.6%
Evenings & Mornings Free Parking	57.4%	51.5%	60.1%	59.1%
Change for the Better	13.2%	14.8%	16.0%	10.2%
Downtown Spirit Bus	42.4%	53.0%	42.3%	35.9%
The Blue Loonie program	16.6%	13.1%	20.1%	16.1%

Table 49 – Respondents aware of downtown events

Downtown events	Average	Downtown	Near Downtown	Suburbs
"In for Lunch"	64.1%	55.8%	66.5%	67.4%
"Out to Lunch"	79.5%	74.6%	76.8%	84.6%
"Chess in the Court"	59.0%	50.4%	63.4%	60.9%
"Chess in the Park"	54.2%	45.4%	57.1%	57.4%
City Lights Cruise	58.6%	56.0%	60.0%	59.2%
"Heart of the Holidays"	39.3%	33.2%	39.6%	42.9%

Table 50 – Respondents attending downtown events

Downtown events	Average	Downtown	Near Downtown	Suburbs
"In for Lunch"	22.1%	18.7%	23.6%	23.1%
"Out to Lunch"	43.5%	38.2%	42.2%	47.7%
"Chess in the Court"	5.6%	3.3%	8.4%	4.9%
"Chess in the Park"	3.7%	2.4%	5.0%	3.7%
City Lights Cruise	12.1%	17.7%	10.1%	10.2%
"Heart of the Holidays"	10.1%	9.6%	9.6%	10.7%

Table 51 – Respondents somewhat or very familiar with BIZ programs

BIZ programs	Average	Downtown	Near Downtown	Suburbs
Watch Ambassadors	91.6%	89.7%	91.7%	92.8%
Clean Team	82.4%	79.4%	84.4%	82.9%
MOST program	46.8%	46.2%	49.5%	45.1%
Cigarette Anti-Butt Program	29.5%	29.7%	32.6%	27.0%
Young Artists	71.3%	71.3%	76.5%	67.4%
Art on the Avenue	83.3%	82.6%	84.6%	82.7%
"Do Downtown"	54.7%	55.2%	58.5%	51.5%
BIZ website	80.9%	79.5%	81.0%	81.7%
The MINGLE	66.6%	49.6%	69.5%	75.0%

For more information, please contact the:

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