downtown
WINNIPEG BIZ

The Downtown Workers Survey 2008

In Collaboration with the Institute of Urban Studies, University of Winnipeg.

About the Downtown 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 also 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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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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Executive Summary

What the survey comprised of

- The Downtown Worker Survey was completed by 1241 workers and was intended to; gather market research information regarding the habits and perceptions of downtown workers; assist current downtown businesses grow and better market themselves; and help attract new businesses opportunities to the downtown.
- The survey consisted of five sections that investigated workday activities; activities outside of work; perceptions of downtown Winnipeg; knowledge of downtown initiatives; and demographic and general information.

Who completed the survey?

- 88% of respondents said they lived outside of the downtown; 62% were females; and just over forty percent were between the age of 35 and 49.
- 72% earned in excess of $50,000 per annum.
- Travelling to work by public transit was the highest reported mode of travel at 34%.
- 65% reported they had in excess of 30 minutes to spend on lunchtime.

What did the survey find?

- Food purchases both in the morning and at lunch were the most often used and most likely to have higher expenditures.
- Over half reported shopping on their lunch break with just over a quarter doing so multiple times per week.

- Activities occurring after the workday or weekends ranked much lower.
- 56% of respondents indicated that they rarely/never purchased dinner while an even higher number (76%) stated that did not buy "take home meals" after work.
- During the workday, coffee/snacks had the highest frequencies of purchase but lower values (owning to the lesser costs of small items).
- After work purchases, while being less frequent, resulted in a positive finding with slightly less than 10% spent between $30 - $50+ weekly.
- Drugstores and clothing purchases ranked highest with respect to services used.
- New services needed in the downtown were related to restaurants and grocery as well as lifestyle shops such as sporting goods and hobbies.
- However, the single biggest issue that needed to be addressed in the downtown was additional security measures (noted by 70% of the sample).
- In shifting to the perceptions that respondents held about the downtown and services, the first question explored respondent's agreement with a number of statements. The results again pointed to the downtown being an important place for events and the heart of the city but that it was not necessarily seen as being clean, pedestrian friendly or a boutique shopping centre. There was also division on whether the downtown was seen as a full service shopping district.

THE PERCEPTIONS OF WORKERS IN THE DOWNTOWN

- Safety remains an ongoing policy challenge for the downtown as while most generally felt safe during the day, this dropped off dramatically during the evening, especially for those parking downtown.
- Women reported much higher levels of insecurity about the downtown.

- The Downtown Spirit, various parking programs and the Out to Lunch program were quite well known among respondents
- Workers were however less likely to be aware of support programs such as the Help Key or Change for the Better.

KEY FINDINGS FROM THE SURVEY

- The Downtown Worker Survey confirmed that many feel the downtown is changing for the better.
- Security issues and sense of safety however remained top of mind for many.
- The workday was perceived as being safe and encouraged shopping and expenditures (especially breakfast and lunch); however there was more apprehensiveness about evening and weekend shopping.
- Differing views existed about using the downtown after hours. While a high percentage regularly attends concerts, sporting events and restaurants in the evening and weekends, few would recommend the downtown for shopping or professional services.
- More work is therefore needed to provide a better mix of services and supports and to address the perceptions that downtown is not a full service shopping district.
- The survey also explored issues by gender revealing that there were some differences that include the types of service needed and used to higher levels of insecurity among females in the downtown.

Introduction

To explore the perceptions of downtown workers regarding the products and services they used most frequently or were in need of during and after the workday, the Downtown Winnipeg Business Improvement Zone (BIZ) undertook a comprehensive survey. The survey was completed by over 1200 downtown workers who highlighted critical aspects of the downtown experience.

Overall, the objectives of the Downtown Worker Survey were to:

- gather valuable market research information about the habits and perceptions of downtown workers;
- assist current downtown businesses grow as well as better market themselves; and
- help market and attract new businesses opportunities to the downtown.

To address the above noted objectives, survey respondents were recruited through three primary means. First, information booths were set up in the downtown to distribute hard copies of questionnaires to willing participants (see Illustration 1 for the locations)[1]. As well, potential respondents were given the option of completing the survey online and were provided with the necessary information and web-links. Lastly, participants were also recruited by e-notices sent through a BIZ list-serve, which also directed persons to the dedicated survey website.

[1] The information booths were operated between May 21st and June 10th of 2008, between the hours of 8h30 and 17h00.

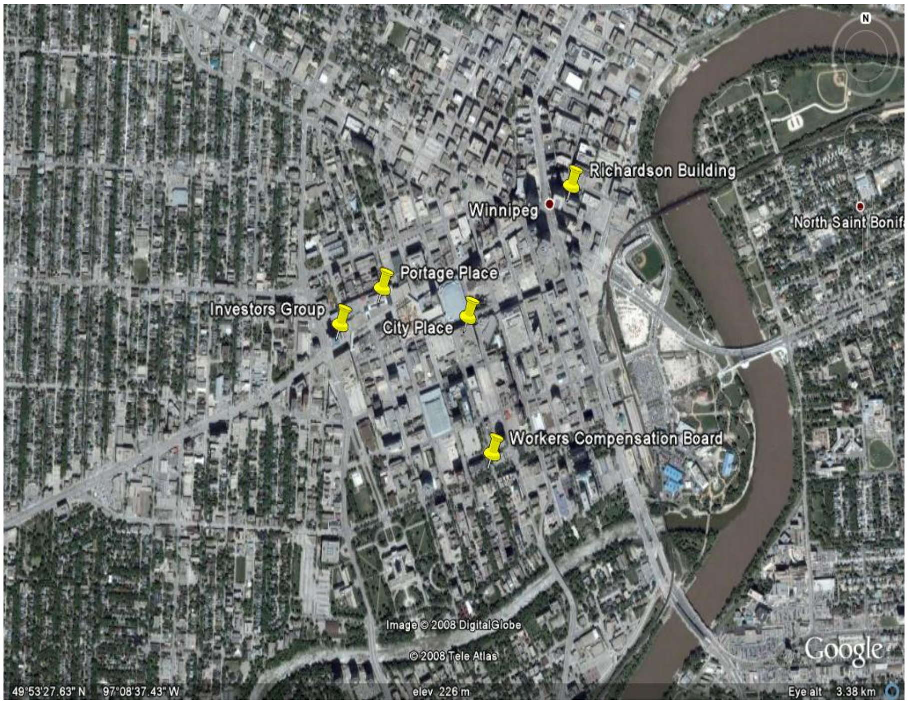

ILLUSTRATION 1: DOWNTOWN WINNIPEG WORKER SURVEY LOCATIONS

Survey Construction and Methodology

The survey contained fourteen questions asking what products and services respondents used in the downtown, as well as their impressions about the downtown and certain BIZ organized activities. These questions employed a variety of formats but were primarily check box questions in which participants selected responses from a set or list of items. These questions were supplemented by four open-ended questions that allowed respondents the opportunity to provide more dynamic feedback. In total, 1580 responded to the survey through various methods of recruitment.[2]

[2] As displayed in Table One, a total of 1580 surveys were completed and included both workers and non downtown workers. For the purposes of this report only those survey respondents who indicated they worked in the downtown are included.

Table 1: Number of Respondents by Survey Type and Method			
Survey Type	**Paper**	**Internet**	**Total**
Worker	416	825	1241
General	109	230	339
Totals	525	1055	1580

The Downtown Worker Survey consisted of five sections that investigated:

- workday activities;
- activities outside of work;
- perceptions of downtown Winnipeg;
- knowledge of downtown initiatives; and
- demographic and general information.

The Institute of Urban Studies (IUS), University of Winnipeg worked with BIZ staff to examine the survey results and assisted the BIZ with the initial data entry (for those surveys completed at the booths). 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. For the open-ended questions, responses were filtered for specific key words representing the general tone of the answer and are summarized in this report.

Profile of Respondents

The following section describes the socio-demographic make-up of the survey respondents (Table 2 to Table 6). When asked where they presently lived, the majority (88.2%) stated they lived outside of the downtown. However, of those living in the downtown, respondents tended to be between the ages of 18 and 34. Overall, there were a higher percentage of female respondents (62%), with just over forty percent of the entire sample being between the age of 35 and 49. With respect to income, 72% of the sample earned in excess of $50,000 per annum.

Mode of travel to work was also explored with the car being used less frequently than alternative modes. To this effect, use of public transit was the highest reported mode of travel at 34% of respondents while driving Alone or Carpooling accounted for a combined 32.5%. As part of this survey explored the frequency and types of services needed or used, respondents also listed the time they had available over lunch, with just over 65% reporting they had in excess of 30 minutes.

Table 2: Sample Gender, n=1170

Gender	Percent
Male	38.0%
Female	62.0%

Table 3: Age Distribution of Respondents, n=1168

Age	Percent
Under 18	0.1%
18-24 Years	7.5%
25-34 Years	23.7%
35-49 Years	43.2%
50-64 years	24.8%
65+	0.7%

Table 4: Sample Household Income, n=1056

Household Income	Percent
Under $10,000	0.8%
$10,000 to $29,999	7.0%
$30,000 to $49,999	20.3%
$50,000 to $59,999	10.3%
$60,000 to $74,999	14.0%
$75,000 and over	47.6%

Table 5: Commute Method, n=1176	
Travel Mode	**Used By**
Walk	12.8%
Bus	34.1%
Bike	2.6%
Drive Alone	14.7%
Carpool	17.8%
Taxi	0.6%
Other	5.9%

Table 6: Length of lunch break, n=1150	
Time for Lunch	**Percent**
Less than 30 minutes	10.3%
30 minutes	21.2%
Between 30 and 60 minutes	41.8%
One hour	24.9%
More than one hour	1.8%

Product Purchases and Frequency of Use

A key aspect of the survey was to explore the frequency and spending on activities during and after the workday. In looking first at the frequency of purchases (Table 7), the highest daily frequency was in the purchase of coffee and snacks with lunch purchases also ranking high with approximately one third indicating that they ate out 2-3 times per week. Shopping during the lunch hour was also well represented with just over a quarter of the sample shopping 2-3 times per week while nearly 34% indicated they shopped 2-3 times per month.

The frequency of purchases dropped off considerably when examining after workday habits. For example, after-work drinks, take-home meals and dinner were bought weekly by less than 10% of the sample. Even monthly, these three categories were not well patronized. However, close to half of people meet others after work (51.8%) at least once a month.

Table 7: Daily Activities Downtown Food Activities, n=1211					
HOW OFTEN DO YOU:	**Daily**	**2-3 Times per Week**	**2-3 Times per Month**	**Once a Month**	**Rarely/ Never**
purchase breakfast near your workplace?	5.4%	12.6%	17.0%	14.9%	50.1%
purchase coffee and snacks near your workplace?	31.2%	28.0%	20.6%	10.6%	9.5%
purchase lunch near your workplace?	11.7%	32.7%	37.2%	10.8%	7.6%
purchase dinner near your workplace?	0.4%	4.3%	12.7%	26.3%	56.4%
purchase take home meals near your workplace?	0.2%	2.8%	10.1%	12.6%	74.2%
meet with people AFTER work at restaurants, bars or pubs near your workplace?	0.7%	3.7%	16.0%	31.4%	48.2%
shop near your workplace during your lunch break?	7.6%	26.0%	33.9%	19.5%	12.9%
shop near your workplace AFTER work?	1.6%	8.2%	18.4%	21.3%	50.5%

In shifting to the amount purchased on various activities, Table 8 displays weekly expenditures for select categories that were represented in Table 7. What is clear from the table is that very few respondents spent in excess of $50 per week on any of their expenditures. The most frequently used categories of coffee & snacks and lunch had a high per-week expenditure with 88.4% spending above 1$, and 27% above 10$ for snacks and 89.9% and 52.9% for lunch, respectively. The lower per week expenditures for snacks is likely due in part to the lower per-unit cost, especially given the higher proportion of daily snack purchases. A promising figure for downtown nightlife was in after work meetings expenditures, where nearly half of respondents (46.9%) spend some money per week.

Table 8: Average Weekly Meal Expenditures, n=1171					
How much do you spend weekly on:	**Nothing or less than $1**	**$1 to $9**	**$10 to $29**	**$30 to $49**	**More than $50**
Breakfast	50.1%	39.4%	9.4%	0.9%	0.2%
Coffee/Snacks	12.6%	60.4%	24.9%	1.6%	0.5%
Lunch	10.2%	37.0%	40.8%	9.9%	2.2%
Dinner	61.1%	11.1%	18.9%	6.6%	2.4%
Take-home Meals	75.7%	9.5%	11.3%	2.5%	0.9%
After work (drinks/meals)	53.1%	15.1%	22.0%	7.1%	2.7%

There were few reasons for workers to come downtown after work or on the weekends. Table 9 shows that less than half of all workers reported coming back downtown more than once a month. The most popular reasons to come back were for shopping (34.5% more than once a month) and to visit a restaurant (32.9%), with the next most popular reasons attracting less than 10% of respondents more than once a month.

That having been said, conferences proved a regular event for most respondents, attracting more than half of respondents at least once a month (53.0%).

Table 9: Frequency and purpose of downtown visits after the work day and weekends, n=1174					
How often do you come downtown:	**Daily**	**2-3 times per week**	**2-3 times per month**	**About once per month**	**Rarely/ Never**
To shop	3.3%	11.7%	19.5%	23.0%	42.2%
To seek professional services	0.2%	0.9%	5.8%	26.1%	66.7%
For everyday services	0.3%	0.6%	5.2%	22.0%	71.8%
To go to a restaurant	1.4%	7.8%	23.7%	35.5%	31.3%
To visit a gallery	0.4%	0.4%	2.9%	16.0%	80.0%
To attend a conference	0.3%	0.7%	7.9%	43.8%	47.0%
To see sports events	0.5%	0.8%	6.5%	29.5%	62.5%
To attend a community event	0.3%	0.6%	5.6%	28.7%	64.5%
To see a movie	0.2%	1.2%	5.7%	23.0%	69.7%
To go to a dance/after hours club	0.5%	1.1%	6.0%	14.3%	77.9%

Products Used and Services Needed

In order to explore shopping habits more closely, respondents were asked to select from a list, the products they most frequently purchased while working downtown (Table 10). These were drugstore/pharmacy items (67.3%) and clothes (55.8%), special occasion cards (44.4%), groceries (37.5%), shoes (32.4%) and books & magazines (31.8%).

This question was then followed by asking what services were accessed most often while working downtown (Table 11). The top three categories were banks (85.2%), fast food (72.0%), and postal services (57.7%). The 4th and 5th ranked services were used by less than a quarter of respondents and included medical at 23.9%, and hair salons at 19.0%.

An analysis of these responses, controlling for gender, showed that the purchase of products and services were different in a number of categories (see Table D 10). For example, the differences between genders when examining the purchase of cosmetics varied by as much as 33.6%. Similarly, women bought more clothes and shoes and jewellery than men did

(24.0%, 20.4%, and 15.4% more often) while men bought more music, home electronics and office supplies (18.2%, 14.3% and 12.8%).

There was less of a dichotomy among services used, with the greatest difference in respective use being among services women accessed more often, postal services, spas and hair salons (7.7%, 4.8% and 4.0% more often than men respectively).

Table 10: Top 5 products purchased as percentage of sample, n=1180

Product	Valid Percent
Drugstore/Pharmacy Items	67.3%
Clothes	55.8%
Special Occasion Cards	44.4%
Groceries	37.5%
Shoes	32.4%

Table 11: Top 5 services used as percentage of sample, n=1180

Service	Valid Percent
Banks	85.3%
Quick/Fast Food	72.0%
Postal Services	57.7%
Medical	23.9%
Hair Salons	19.0%

Respondents were also given the opportunity to provide more thought on services needed in the downtown through an open-ended question (**Error! Reference source not found.**). Overall, just under half the sample provided some thought to this question and generated a total of 582 responses that were grouped accordingly. By a large margin, the most requested services or products were related to food. To this effect most indicated that more affordable and healthy restaurants, along with grocery stores were needed. Second were lifestyle shops such as crafts and sporting goods (21%), clothing and related services was third at 17%.

Table 12: Key Word Answers "What products or services do you want to see Downtown?", n=582	
What Services Do You Want?	**Mentions (%)**
Food (Grocery/Restaurant)	40.9%
Lifestyle Shops (Sporting Goods, Crafts, Hobbies...)	21.3%
Clothing & Related Services	17.0%
Entertainment	7.2%
Electronics, Computers, Videos, Video games	6.9%
Discount/Cheap	6.7%

In a related question, respondents were asked to suggest a single change in the downtown that was needed. The overwhelming response involved security where almost 7 out of 10 responses (69.0%) asked for some form of improvement in security. Security issues included having a focus on panhandling, perceptions of gang activity and a desire for more frequent foot patrols in the area. Other issues brought up included a having more outdoor space (16.1%), better/more frequent/more accessible transit (9.9%), free parking (9.3%), and an improvement in the cleanliness of downtown (8.6%).

Table 13: Top 5 Key Word Appearances for Question 11, n=659	
If the BIZ could change one thing about downtown...	**Mentions (%)**
Security	69.0%
Outdoor Space (parks, patios, etc.)	16.1%
Transit	9.9%
Parking Issues	9.3%
Clean	8.6%

Perception and the Downtown

A key aspect of the survey was to explore the perception of the downtown. To accomplish this, two sets of questions investigated whether respondents agreed with a series of statements about the downtown by asking whether they agreed strongly or somewhat, or were neutral. To graphically display this, Illustration 2 groups both levels of agreement/disagreement together; so that those people that indicated agreeing strongly or somewhat show up together under agree. Longer bars to one either side indicate a strong general opinion on the statement.

The results show that respondents generally agreed that downtown Winnipeg is the city's primary culture and event area, and that it is the heart of the city. There was also a support for the assertion that the downtown is continually changing for the better. However, there was considerable disagreement with the idea that downtown Winnipeg is a pedestrian friendly area[3].

[3] There is a significant difference of opinion on a number of issues: see **Table D 7** in Appendix D

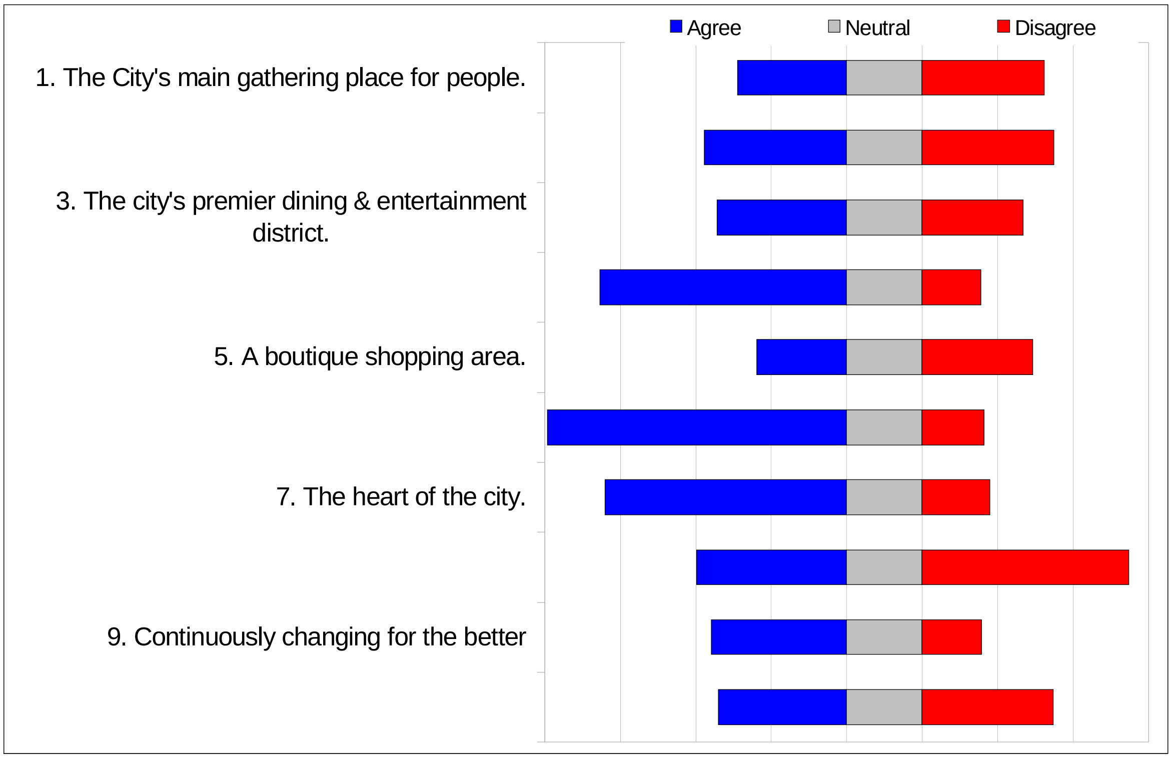

ILLUSTRATION 2: AGREEMENT WITH STATEMENTS, N=1155

Using the same scale, respondents were also asked to consider how safe people felt in different situations in the downtown. Again, responses have been graphically represented in Illustration 3, which shows that respondents feel very unsafe downtown at night (full results in Table D 8). This is even more striking when investigating the reactions when controlling for gender where women were much more unlikely to feel safe than men in all four situations (Illustration D 1).

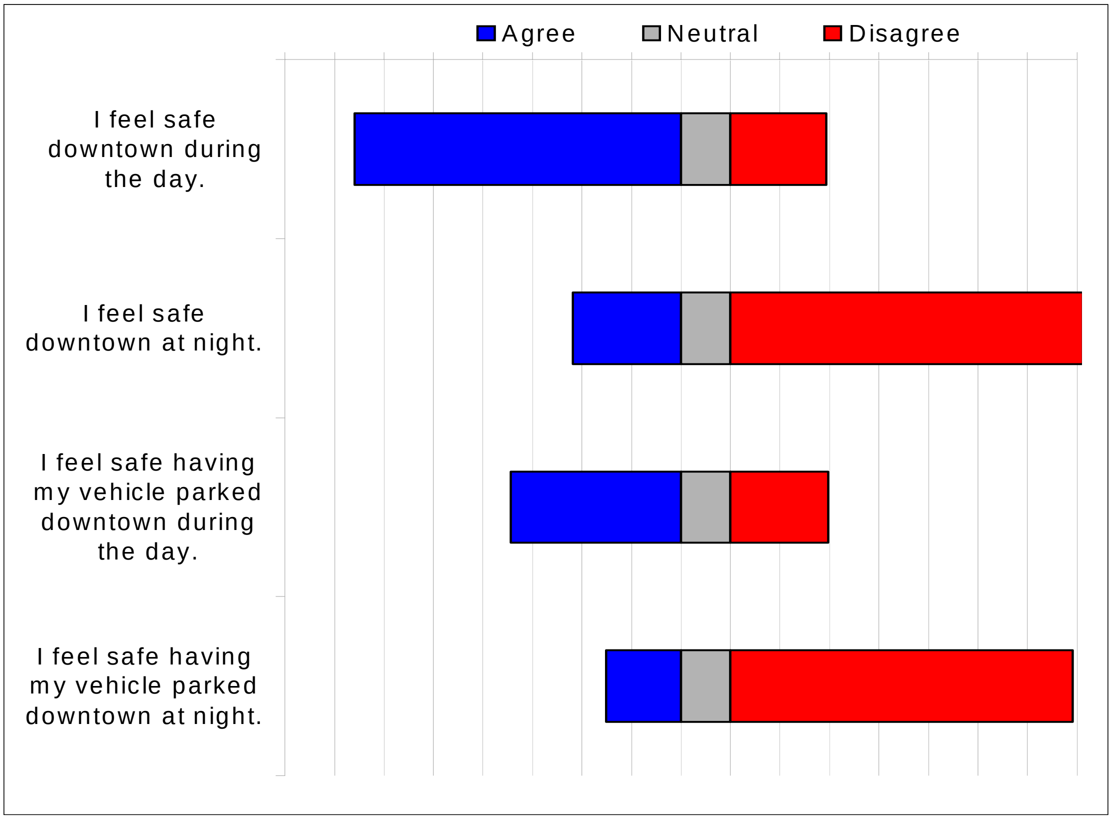

ILLUSTRATION 3: FEELINGS OF SAFETY, N=1079

Public Awareness of Downtown Activities

The Downtown Worker Survey also gathered information on public awareness and the use of initiatives in the downtown. This section began by asking whether respondents were aware of a number of programs (Table D 6). The following illustration displays considerable awareness of most of the programs listed, with the exception of initiatives geared toward helping the homeless; the "Change for the Better"; and the Help Key. The Blue Loonie program is also less well known than some of the other initiatives available. In contrast, the parking initiatives and the Spirit bus have all achieved approximately 90% recognition.

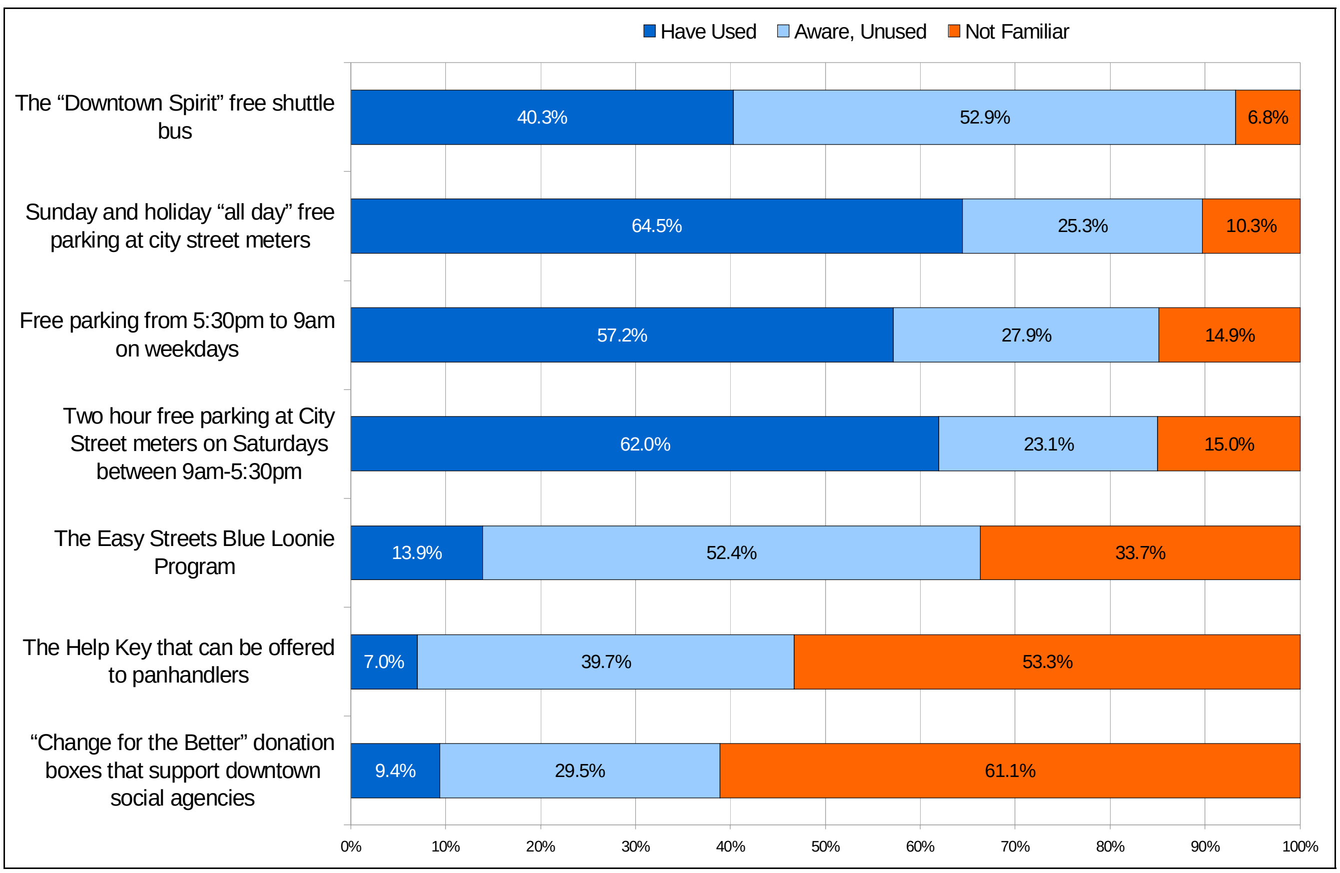

ILLUSTRATION 4: FAMILIARITY WITH DOWNTOWN INITIATIVES, N=1173

The survey also probed the patronage of selected downtown events with the Out to Lunch concert series obtaining the highest attendance percentage of the five events listed with 45% indicated that have attended. The least attended event was Chess in the Park, with half indicating they had not heard of this initiative.

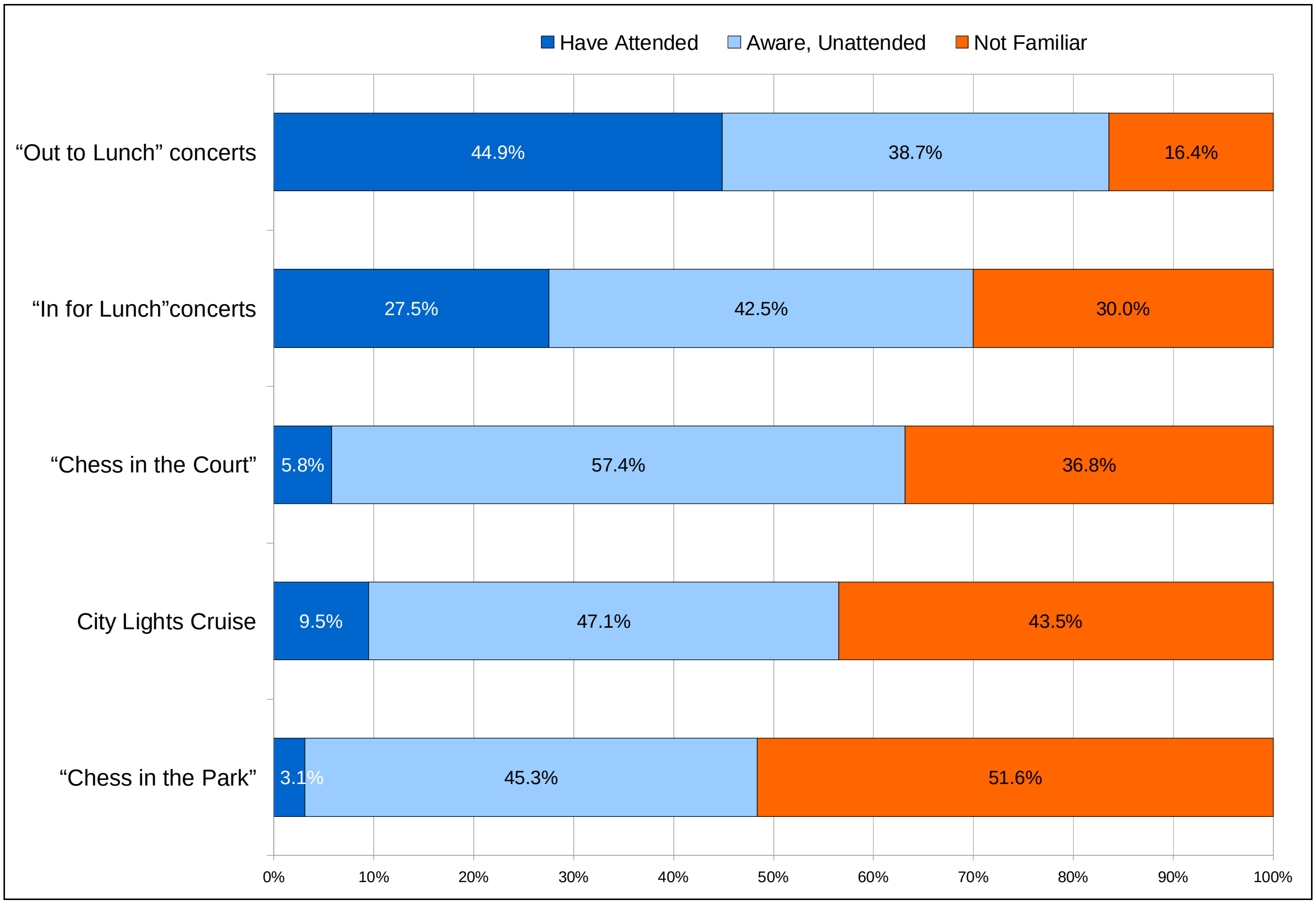

ILLUSTRATION 5: ATTENDANCE AT DOWNTOWN EVENTS, N=1174

Finally, when asked specifically about familiarity with Downtown Winnipeg BIZ initiatives, most were at least known to the respondents. The most recognized of all the initiatives is the Downtown Watch, with nearly 95% familiar with them. Art on the Avenue, the Clean Team and Young Artists on the Avenue were also well known programs.

The least well known, with under 50% recognition by respondents, were Urbanite Magazine, MOST, and the Cigarette Anti-Litter program, with combined reported familiarity of 47.3%, 35.6% and 28.9% respectively.

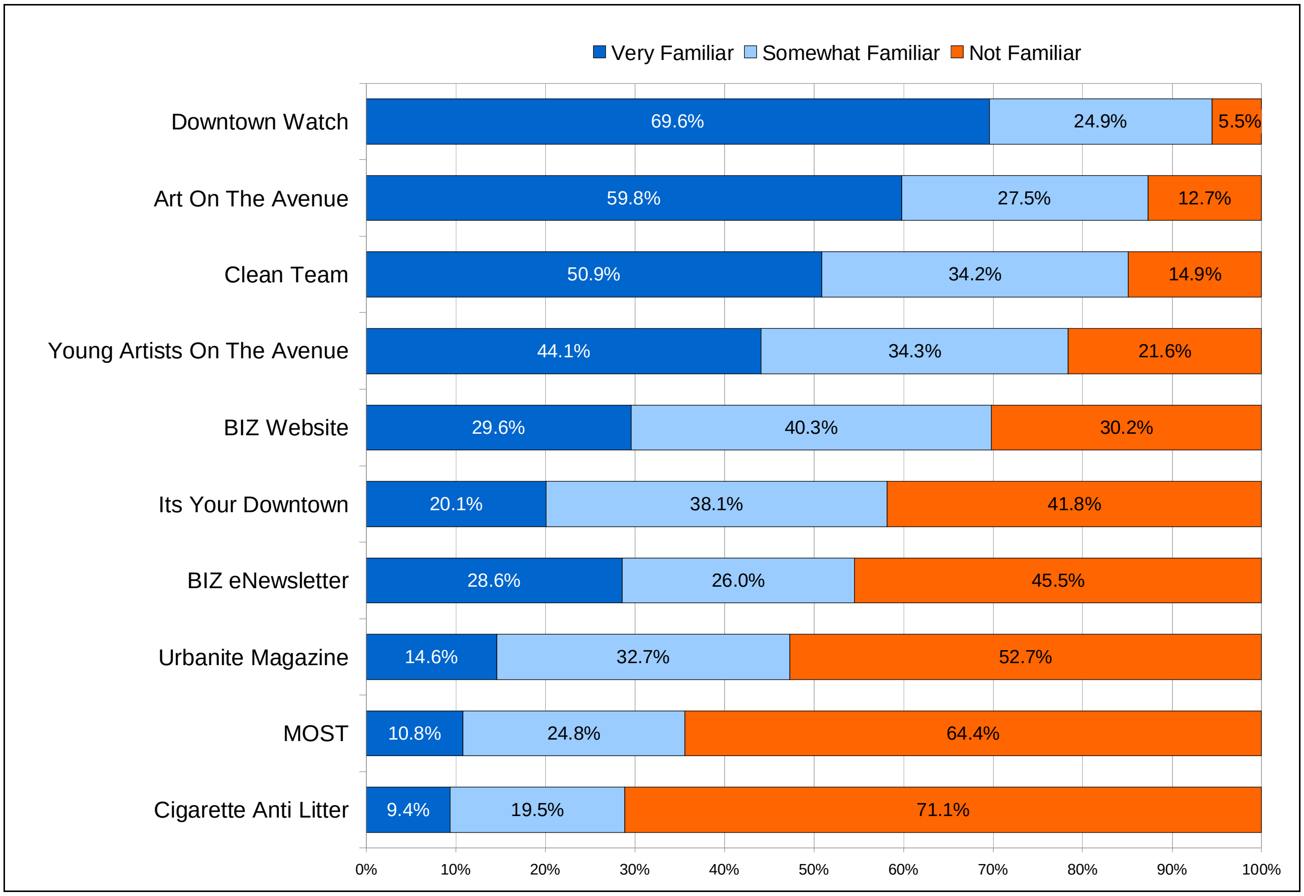

ILLUSTRATION 6: FAMILIARITY WITH DOWNTOWN BIZ INITIATIVES, N=1174

Report Summary

This report examined the use of services and the awareness of various programs in the downtown. It used a survey of downtown workers to explore their perceptions and attitudes regarding a number of issues. Of the 1241 workers who responded, most lived outside of the downtown, with over half being employed in the office sector. The sample also had a high number earning in excess of $50,000 while just over 70% indicated they had a University or College degree. Also, a third indicated their main mode of transportation into the downtown for work purposes was by bus.

The first section of the report explored the purchases and frequency of use of various services. Not surprisingly, food purchases both in the morning and at lunch were the most often used and most likely to have higher expenditures. Those activities that occurred after the workday ranked much lower. In particular, 56% of respondents indicated that they rarely/never purchased dinner while an even higher number (76%) stated that they did not buy “take home meals” after work. On the more encouraging side, over half reported shopping on their lunch break with just over a quarter doing so multiple times per week.

With respect to the value of expenditures in the downtown during the workday, coffee/snacks had high frequencies of purchase but lower values (owning to the lesser costs of small items). After work purchases, while being less frequent, did result in a positive finding in that slightly less than 10% spent between $30 - $50+ weekly.

In exploring the products used and needed in the downtown, it was noted that drugstores and clothing purchases ranked highest, but that there were also distinct differences when exploring the results by gender. In terms of what was needed in the way of new services in the downtown, it was reported that additional stores (restaurants/grocery) as well as lifestyle shops (sporting goods/hobbies) were ranked highest among the respondents. In a related question respondents were asked what was the single biggest issue needed in the downtown. The response to this question was clear in that roughly 70% indicated that additional security measures were the answer.

In shifting to the perceptions that respondents held about the downtown and services, the first question explored respondent's feelings about the downtown. The results again pointed to the downtown being an important place for events and the heart of the city but that it was not necessarily seen as being clean, pedestrian friendly or a boutique shopping centre. There was also division on whether the downtown was seen as a full service shopping district.

Safety also presents an ongoing policy challenge for the downtown as while most respondents generally felt safer during the day, this dropped off during the evening, especially for those parking downtown. Furthermore, women reported much higher levels of insecurity about the downtown.

The final area that was reviewed was program recognition in the downtown with most recognizing that Downtown Spirit and the various parking programs but less likely to be aware of support programs such as the Help Key or Change for the Better. Awareness of programming such as the Out to Lunch series was high with high use and awareness. The remaining programs dropped off significantly with respect to respondents indicating that they had attended.

Overall, the Downtown Worker Survey helped to understand some of the dynamics of the Winnipeg's downtown, with many feeling that downtown was changing for the better. However, security issues and sense of safety remain top of mind for many. Also, while the workday was perceived as being safe and also encouraged shopping and expenditures (especially breakfast and lunch), there was more apprehensiveness about evening and weekend shopping.

More work is therefore needed to provide a better mix of services and supports and to address the perceptions that downtown is not a full service shopping district. To this effect, many called for more services but most were related to food purchases. What was positive in this was that respondents did call for more lifestyle shops and services recognizing that for example there was an absence of sporting goods shops. The results of the survey were also explored by gender revealing that there were some differences that include the types of service needed and used to higher levels of insecurity among females in the downtown. Also, the tables listed in the appendix B1 and B2 present two differing views about using the downtown after hours. In looking first at Table B1, it does list many positive findings in that a high percentage regularly attending concerts, sporting events and restaurants but Table B2 indicates that few would recommend the downtown for shopping or professional services.

Undoubtedly, more work is needed to address many of these issues and to also build on the successes of the downtown that have been outlined in the report.

Appendix A – Demographics

Table A 1: Education, n=1115	
Education Level	**Valid Percent**
Grade School/Some High School	1.7%
Completed High School	17.1%
Technical/Vocational School	8.8%
University/College	71.6%
Other	0.8%

Table A 2: Age, n=1168	
Age	**Valid Percent**
Under 18	0.1%
18-24 Years	7.5%
25-34 Years	23.7%
35-49 Years	43.2%
50-64 years	24.8%
65+	0.7%

Table A 3: Gender, n=1170	
Gender	**Valid Percent**
Male	38.0%
Female	62.0%

Table A 4: Marital Status, n=1163	
Marital Status	**Valid Percent**
Single	35.0%
Married/Common Law	65.0%

Table A 5: Number of Children, n=732	
Number of Children	**Valid Percent**
0	19.0%
1	19.8%
2	41.5%
3	13.0%
4	5.2%
5+	1.5%

Table A 6: Household Income, n=1056	
Household Income	**Valid Percent**
Under $10,000	0.8%
$10,000 to $29,999	7.0%
$30,000 to $49,999	20.3%
$50,000 to $59,999	10.3%
$60,000 to $74,999	14.0%
$75,000 and over	47.6%

Table A 7: Occupation, n=1137	
Occupation Categories	**Valid Percent**
Retail	2.2%
Education/Research	3.5%
Hospitality	2.4%
Production	1.5%
Office	57.5%
Medical	1.5%
Student	1.1%
Other	22.0%

Work Demographics

Table A 8: Work Downtown, n=1241	
Do you work downtown?	**Valid Percent**
Yes	98.8%
No	0.7%

Table A 9: Work Location, n=1085	
Location	**Valid Percent**
The Forks	0.6%
Broadway and Assiniboine	19.1%
Midtown (Graham, St. Mary and York Ave.)	21.5%
Portage Avenue East	6.9%
Main Street North (City Hall, Chinatown, etc.)	4.2%
Ellice Avenue	1.5%
Exchange District	7.3%
Portage Avenue (Spence to Main)	26.2%

Table A 10: Time Employed, n=1150	
Time employed	**Valid Percent**
Less than 6 months	7.4%
6 months to 1 year	8.1%
1-2 years	12.4%
3-4 years	14.2%
5 years or more	58.0%

Table A 11: Work Shifts, n=1143	
Work shifts	**Valid Percent**
Full Time	0.9%
Part Time	0.1%

Table A 12: Work Times(Multiple Responses), n=1135	
Work Times	**Valid Percent**
Weekdays	96.3%
Weekends	5.2%
Weekday Evenings	4.1%
Variable/Shift work	3.6%

Table A 13: Time for Lunch, n=1150	
Time for Lunch	**Valid Percent**
Less than 30 minutes	10.3%
30 minutes	21.2%
Between 30 and 60 minutes	41.8%
One hour	24.9%
More than one hour	1.8%

Table A 14: Commute Method, n=1176	
Travel Mode	**Used By**
Walk	12.8%
Bus	34.1%
Bike	2.6%
Drive Alone	14.7%
Carpool	17.8%
Taxi	0.6%
Other	5.9%

Table A 15: Live Downtown?, n=1168	
Live Downtown	**Valid Percent**
No	88.2%
Yes, I rent	8.8%
Yes, I own	3.0%

Appendix B – Downtown Activities Outside of Work

Question 6 asked how often respondents came downtown to access a number of services. This built on question 4 by determining a frequency.

The majority of respondents rarely or never accessed many of the services investigated. Only three, shops, restaurants, and concerts, are frequented once a month or more. 58.2%, 68.8% and 52.9% of users, respectively, use these on a monthly or better basis.

Only one service is used on a weekly or better basis by more than 10% of respondents, shopping.

Table B 1: Frequency of Activities Downtown, n=1174					
HOW OFTEN DO YOU COME DOWNTOWN...	**Daily**	**2-3 Times Per Week**	**2-3 Times Per Month**	**About Once a Month**	**Rarely/ Never**
• To shop	3.6%	12.2%	19.4%	23.1%	41.8%
• For professional services (e.g. lawyer, doctor, dentist, etc.)	0.3%	1.0%	5.9%	26.3%	66.6%
• For everyday services (e.g. hair cut, tailor, etc.)	0.3%	0.6%	5.4%	22.4%	71.2%
• To go to a restaurant	1.5%	8.0%	23.9%	35.3%	31.2%
• To visit a gallery	0.4%	0.5%	3.0%	16.4%	79.7%
• To attend a concert	0.3%	0.8%	7.9%	43.8%	47.1%
• For sporting events	0.5%	0.9%	6.4%	29.2%	62.9%
• To attend a community event or festival	0.3%	0.7%	5.7%	28.7%	64.7%
• To attend a movie	0.3%	1.3%	5.8%	23.1%	69.6%
• To visit a night club	0.5%	1.1%	6.1%	14.1%	78.2%

Question 7 asked whether or not a user would “recommend downtown Winnipeg to your family and friends for” a number of services. Respondents were not given the option of answering no; if they did recommend a service they would check that service. This unfortunately meant that respondents that chose to skip over this section would be appear to be indicating that they recommend no services. For this reason it is likely that the proportion of “No's” is biased higher than is really the case.

Dining and entertainment are almost equal, with 62.2% and 62.5% of people saying they would recommend downtown to others. Everyday services are the least well perceived, with 17.8% indicating they would recommend.

Table B 2: Would you recommend any of the following					
Would you recommend?	**Dining**	**Shopping**	**Entertainment**	**Professional Services**	**Everyday Services**
Yes	62.2%	34.7%	62.5%	28.4%	17.8%
No	37.8%	65.3%	37.5%	71.6%	82.2%

Appendix C – Rapid Transit Response Tables

Table C 1: Rapid Transit Response					
Statement	**Strongly Agree**	**Somewhat Agree**	**Neutral**	**Somewhat Disagree**	**Strongly Disagree**
I think the City Of Winnipeg Should Create Rapid Transit	55.6%	23.0%	12.4%	3.6%	5.4%
I would Use Rapid Transit To Get To And From Work	49.0%	23.9%	14.8%	4.1%	8.3%

Appendix D – Full Response Tables

Table D 1: Daily Activities Downtown Food Activities, n=1211					
HOW OFTEN DO YOU:	**Daily**	**2-3 Times per Week**	**2-3 Times per Month**	**Once a Month**	**Rarely/ Never**
Purchase breakfast near your workplace?	5.4%	12.6%	17.0%	14.9%	50.1%
Purchase coffee and snacks near your workplace?	31.2%	28.0%	20.6%	10.6%	9.5%
Purchase lunch near your workplace?	11.7%	32.7%	37.2%	10.8%	7.6%
Purchase dinner near your workplace?	0.4%	4.3%	12.7%	26.3%	56.4%
Purchase take home meals near your workplace?	0.2%	2.8%	10.1%	12.6%	74.2%
Meet with people AFTER work at restaurants, bars or pubs near your workplace?	0.7%	3.7%	16.0%	31.4%	48.2%
Shop near your workplace during your lunch break?	7.6%	26.0%	33.9%	19.5%	12.9%
Shop near your workplace AFTER work?	1.6%	8.2%	18.4%	21.3%	50.5%

Table D 2: Average Weekly Meal Expenditures, n=1171					
How much do you spend weekly on:	**Nothing or less than $1**	**$1 to $9**	**$10 to $29**	**$30 to $49**	**More than $50**
Breakfast	50.1%	39.4%	9.4%	0.9%	0.2%
Coffee/Snacks	12.6%	60.4%	24.9%	1.6%	0.5%
Lunch	10.2%	37.0%	40.8%	9.9%	2.2%
Dinner	61.1%	11.1%	18.9%	6.6%	2.4%
Take-home Meals	75.7%	9.5%	11.3%	2.5%	0.9%
After work (drinks/meals)	53.1%	15.1%	22.0%	7.1%	2.7%

Table D 3: Top 5 products purchased as percentage of sample, n=1180	
Product	**Valid Percent**
Drugstore/ Pharmacy Items	67.3%
Clothes	55.8%
Special Occasion Cards	44.4%
Groceries	37.5%
Shoes	32.4%

Table D 4: Top 5 services used as percentage of sample, n=1180	
Service	**Valid Percent**
Banks	85.3%
Quick/Fast Food	72.0%
Postal Services	57.7%
Medical	23.9%
Hair Salons	19.0%

Table D 5: Familiarity and attendance of Downtown events, n=1174			
Event	**Attended**	**Familiar, didn't attend**	**Not Familiar**
"In for Lunch" free noon-hour winter concerts	27.5%	42.5%	30.0%
"Out to Lunch" free noon-hour summer concerts	44.9%	38.7%	16.4%
"Chess in the Court" at Portage Place	5.8%	57.4%	36.8%
"Chess in the Park" in Merchant Park	3.1%	45.3%	51.6%
City Lights Cruise Wednesday evening car shows	9.5%	47.1%	43.5%

Table D 6: Familiarity with Downtown BIZ initiatives, n=1155			
How familiar are you with:	**Very Familiar**	**Somewhat Familiar**	**Not Familiar**
Downtown Watch	69.6%	24.9%	5.5%
Clean Team	50.9%	34.2%	14.9%
MOST	10.8%	24.8%	64.4%
Cigarette Anti Litter	9.4%	19.5%	71.1%
Young Artists On The Avenue	44.1%	34.3%	21.6%
Art On The Avenue	59.8%	27.5%	12.7%
Its Your Downtown	20.1%	38.1%	41.8%
Urbanite Magazine	14.6%	32.7%	52.7%
BIZ Website	29.6%	40.3%	30.2%
BIZ eNewsletter	28.6%	26.0%	45.5%

Table D 7: Agreement with Statements, n=1155					
	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
The City's main gathering place for people.	6.6%	29.0%	24.6%	23.1%	16.7%
A full service shopping district	6.8%	33.9%	21.6%	26.8%	10.9%
The city's premier dining & entertainment district.	11.3%	31.0%	24.7%	23.6%	9.5%
The place where all the big events happen.	19.2%	45.5%	19.8%	11.5%	4.0%
A boutique shopping area.	6.0%	26.6%	27.3%	26.3%	13.9%
The city's heritage and cultural district.	26.4%	42.2%	17.3%	10.4%	3.9%
The heart of the city.	26.3%	36.4%	19.6%	11.3%	6.4%
A pedestrian friendly place.	8.1%	26.6%	17.5%	25.6%	22.3%
Continuously changing for the better	11.8%	38.3%	27.9%	14.7%	7.3%
An overall clean place	5.8%	32.5%	22.5%	22.9%	16.3%

Table D 8: Feelings of Safety, n=1154					
I feel safe:	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
- Downtown during the day.	31.40%	37.80%	10.50%	14.40%	5.90%
- Downtown at night.	4.80%	16.40%	9.70%	27.20%	41.90%
- Having my vehicle parked downtown during the day.	17.20%	36.50%	15.60%	19.30%	11.50%
- Having my vehicle parked downtown at night.	3.80%	12.30%	10.60%	29.10%	44.20%

Table D 9: Residence by Age Group, under 18 omitted (n=1), n=1158					
Residence	**18-24 Years**	**25-34 Years**	**35-49 Years**	**50-64 Years**	**65+**
No	76.7%	83.9%	91.1%	90.6%	50.0%
Yes, I rent	18.6%	12.1%	6.0%	6.6%	50.0%
Yes, I own	4.7%	4.0%	2.8%	2.1%	0.0%

Table D 10: Q.3, Product use by Gender, Male, n=424, Female, n=711				
Male	**Valid Percent**		**Female**	**Valid Percent**
Drugstore/ Pharmacy Items	65.1%		Drugstore/Pharmacy Items	64.1%
Clothes	40.1%		Clothes	39.5%
Books & Magazines	39.4%		Special Occasion Cards	19.8%
Special Occasion Cards	37.3%		Groceries	36.0%
Office Supplies	35.1%		Shoes	22.6%
Groceries	31.6%		Cosmetics	19.7%
Music	28.3%		Books & Magazines	48.4%
Shoes	19.1%		Bath & Body Products	27.0%
Discount Shops	18.9%		Office Supplies	22.4%
Home Electronics	16.0%		Jewelry & Accessories	10.1%
Sporting Goods	13.7%		Discount Shops	2.3%
Specialty Foods	13.4%		Health Foods	0.8%
Toys & Games	9.4%		Music	3.4%
Bath & Body Products	9.2%		Specialty Foods	0.7%
Health Foods	8.5%		Home Accessories	1.7%
Telecommunications	7.5%		Flowers & Plants	4.1%
Flowers & Plants	6.4%		Toys & Games	68.6%
Home Accessories	6.1%		Hobby/Craft Items	10.7%
Jewelry & Accessories	4.5%		Art Supplies	40.9%
Hobby/Craft Items	3.3%		Sporting Goods	6.0%
Other	3.1%		Home Electronics	3.7%
Art Supplies	2.8%		Other	1.3%
Cosmetics	2.4%		Telecommunications	1.7%
Antiques	2.1%		Antiques	4.4%
Home Furnishings	1.4%		Fabric	0.7%
Fabric	0.2%		Home Furnishings	1.7%

Table D 11: Q.31*Q.18, Downtown Residence by Age Group, n=1156			
Age Group	**No**	**Yes, I rent**	**Yes, I own**
Under 18	100.0%	0.0%	0.0%
18-24 Years	76.7%	18.6%	4.7%
25-34 Years	83.9%	12.1%	4.0%
35-49 Years	91.3%	6.0%	2.8%
50-64 Years	91.2%	6.7%	2.1%
Over 65 Years	50.0%	50.0%	0.0%
Sample Average	88.1%	8.8%	3.0%

Table D 12: Q.32*Q.18, Reasons for not living downtown by Age, n=1168						
Statement	**18-24 Years**	**25-34 Years**	**35-49 Years**	**50-64 Years**	**65+**	**Sample Average**
Doesn't Fit Residential Needs	27.6%	43.7%	56.0%	51.4%	12.5%	49.5%
Type of housing I want doesn't exist downtown	26.4%	35.7%	41.2%	33.4%	0.0%	36.6%
No housing in my price range	20.7%	14.1%	6.7%	9.0%	0.0%	10.1%
Shortage of amenities I need	19.5%	18.1%	14.3%	13.4%	0.0%	15.2%
Security is an issue to me	42.5%	43.7%	39.4%	37.2%	0.0%	39.8%
Other	10.3%	11.6%	11.7%	11.4%	12.5%	11.5%
Not Applicable	11.5%	3.6%	4.4%	7.2%	25.0%	5.6%

Table D 13: Q.33*Q.18, Would live downtown if issues were resolved by Age, n=1051					
Answer	**18-24 Years**	**25-34 Years**	**35-49 Years**	**50-64 Years**	**65+**
Yes	82.4%	66.8%	61.5%	64.4%	83.3%

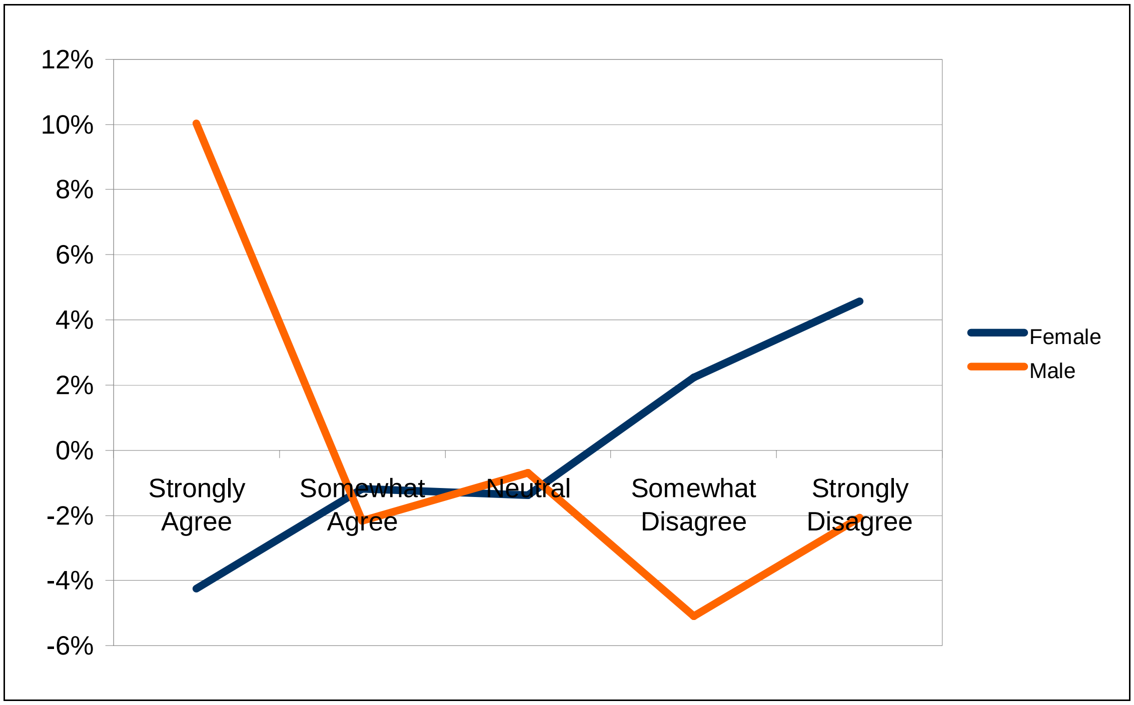

ILLUSTRATION D 1, PERCEPTIONS OF SAFETY,
GENDER DEVIATIONS FROM SAMPLE AVERAGE, N=1062