Downtown Winnipeg
Pedestrian Intercept Study

Prepared for Downtown Winnipeg BIZ

by

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FINAL REPORT

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1.0 Introduction

The report presents the results of a survey of pedestrians in downtown Winnipeg undertaken by the Winnipeg Downtown Biz in March / April 2005. The purpose of the survey was to develop a demographic and socio-economic profile of downtown pedestrians at key specific areas in the Downtown. The survey also attempted to gauge how often people visit the downtown, the type of activities they are engaged in while downtown, and their thoughts regarding the types of shopping, service, or entertainment facilities that would make the downtown a more attractive destination.

Section 2 of the report outlines the methodology used to collect data for this study. Section 3 summarizes the results beginning first with a basic description of those who completed the questionnaire followed by some cross-tabulation analysis that compares characteristics of those who work downtown as opposed to those who were downtown for other reasons. Tables and figures prepared in the analysis stage of the project are presented in an appendix. Finally, Section 4 provides an overall summary of the findings and makes some suggestions for future research.

2.0 Research Methods

The questionnaire survey used for this study was based on one developed by the JC Williams Group of Toronto with some adaptations made by the Biz. The questionnaire is designed to collect basic demographic and socio-economic information from participants such as age, income, and marital and employment status. Other questions solicit information on the reason for being downtown, method of travel, and normal frequency of downtown visits. The questionnaire concludes with an opportunity for survey participants to provide opinions on what would make them come downtown more often.

The survey was conducted by six members of the Biz Downtown Watch patrol in February and March of 2005. Pedestrians were stopped and asked if they would complete the questionnaire. A total of 336 pedestrians participated in the study, 60% of them being male.

Completed questionnaires were numerically coded and entered into a data file for processing using SPSS. The total number of responses available for analysis, however, varied from question to question as not all participants answered all of the questions. In some instances, information such as time and place of interview was not recorded.

About 60% of the interviews were conducted in the pedestrian walkways in the MTS Centre (see Table 1). Of these interviews, about three-quarters were completed on a weekday and one-quarter prior to an evening event at the centre. Interviews in Portage Place and the Investor's Building accounted for another 25% of the respondents. On 50 questionnaires, no information was recorded as to the location of the interview.

A large majority (90%) of the interviews were conducted during the week (see Table 2). About 40% of the interviews were completed during the afternoon while an additional 30% were done in the evening (see Table 3). Again, information on the day and time of the interview was not recorded on all questionnaires. Note that in Tables 1, 2 and 3, the percentages of respondents are also calculated based on the sub-total of questionnaires for which data was provided.

3.0 Survey Results

This section presents the results of the pedestrian intercept survey. The analysis presented is based on the 329 questionnaires completed by persons 18 years of age and older. As noted in the Research Methods discussion above, not all questionnaire surveys were completed in their entirety. For the purposes of this section of the report, percentage calculations were done using the total number of responses available as the base.

3.1 Demographic and Socio-Economic Profile of Pedestrians.

Participants in the survey were asked to provide information about their age, marital status, family composition, employment status, income and occupation. Characteristic features of the respondents on each of these dimensions is outlined below. Tabular summaries are found in the Appendix.

AGE (see Table 4)

- Persons between the ages of 18-24 made up the largest segment of the respondents (about 33%)
- Relatively equal numbers of respondents are found in the 25-34, 35-44 and 45-54 age cohorts (about 18% each)
- Senior citizens (ages 65 and up) comprise only 4% of those interviewed

Marital and Family Status (see Table 5 & 6)

- Most respondents are single (about 61%). Of those who are single, one in five report having a child under the age of 18 living at home
- Married or common law status was reported by just over 1/3 of the respondents. Children are present in approximately 50% of these homes.
- For those homes with children, the average number of children was 1.7

Employment and Occupation Status (see Table 7)

- 80% of respondents work outside the home
- Of those working outside of the home, 70% have full time jobs
- Occupations in Professional / Technical and Service fields were the most commonly mentioned by respondents. Approximately 45% of the 255 who reported an occupation fell into these two categories.

Income (see Table 8)

Household income is dependent upon several factors but one of the more important factors aside from occupation and age of income earners is marital status. Two income households usually have higher income levels than single person households. To control for this factor, analysis of the distribution of household incomes included a cross-tabulation of income against the marital status of the respondent.

- About 55% of respondents live in households that earn less than $40,000. This is not surprising given that younger age groups make up a large proportion of the sample.

- About 23% of the respondents are members of households that earn in excess of $75,000
- Single persons tend to be more prevalent in the lower end of the income scale but notably, nearly one in five has an income greater than $75,000.

- Almost 1/3 of married respondents report a household income greater than $75,000.

3.2 Mode of Transportation Used and Reasons for Downtown Visits

Participants in the survey were asked to indicate their primary purpose for being downtown and by what means they had travelled there on the day of the interview. Participants were also asked about how often they visited the downtown.

Means of Travel

- The preferred means of travel to the downtown is the automobile. Just over 50% of respondents indicated that they came to the downtown in a private vehicle while another 4% came as part of a car-pool arrangement.

- Approximately 25% used public transit to get downtown. Nearly 20% had walked.

Primary Reason for Being Downtown (see Table 10)

The questionnaire was designed with the intent that participants would give only one response to the question "What is Your Primary Reason for Visiting Downtown Today?" However, some respondents ticked more than one box and in a few cases as many as four boxes. In processing those cases with multiple responses, it was assumed that if one of reasons indicated was to come to work, then that was the primary reason. A total of 318 persons answered this question giving in aggregate 380 responses. Table 10 shows the percentage distributions according to the total number of responses given as well as the number of respondents.

- Just over ½ of the respondents indicated that they had come downtown to go to work
- To attend an entertainment venue was the 2nd most common reason for being downtown. This was mentioned by just under 20% of the respondents. A large majority of these respondents (60%) were evening visitors.
- Shopping was the third most common reason being mentioned by about 13% of the participants.

Other Things Normally Done in the Downtown (see Table 11)

Participants were also asked what other types of activities they normally did downtown. Again, multiple responses were allowed. A total of 276 participants provided at least one answer to this question. The total number of responses given was 680.

- Shopping was the most common response; it was mentioned by just over ½ of those who responded to this question.
- Restaurant dining and visits to entertainment venues were each mentioned by about 40% of those who responded.
- A variety of activities including appointments with professionals, grabbing a light snack, visiting friends and use of services such as banking or drycleaners were each mentioned by between 10 and 20% of those who responded.

3.3 Frequency of Downtown Visits

A key indicator of the health of a downtown is how regularly citizens frequent the area. One of the strengths of Winnipeg's downtown is the significant influx each day of persons who are employed in the downtown. Obviously, this segment of the population makes frequent visits to the downtown and it goes without saying that it plays a critical role in injecting money into the downtown economy. For the purposes of this analysis of frequency of visits, however, it was decided to focus on visitors to the downtown who were not there to work.

In order to separate the non-work downtown visitors from the downtown employees, it was necessary to make some assumptions about the data provided on the questionnaires. Participants in the study were asked how often they visit the downtown (see Table 12). Of the 322 who provided an answer, 42 indicated that they come downtown five days a week to their place of employment. However, from the question that asked for the primary reason for being downtown, we have already seen that some 162 people indicated that they were downtown to work. This discrepancy is likely explained by the fact that downtown workers, when asked about their frequency of visits, ticked the first box they came to which was daily and never did see the last option in the list which was "I work downtown 5 days a week." For the purposes of isolating visitors not downtown to work, it was decided therefore to rely on information given regarding the reason for being downtown the day of the interview.

<u>Frequency of Visits by Persons not in the Downtown Workforce</u> (see Table 13)

- Based on the above assumptions, 156 people were identified as not being employed downtown. Only two of these did not respond to the question on frequency of visits.

- Of the 154 who provided information on visit frequency, almost 60% come to the downtown at least once per week.

- Only about 20% of non-downtown workers in the sample come downtown once per month or less.

<u>Attributes of Non-Workers by Frequency of Visits</u> (see Table 14)

To further compare and describe participants in the study who do not work downtown, some cross-tabulations of frequency of downtown visits against various attributes of the participants such as age, gender, marital status, and income were run.

- As noted above, just under 60% of visitors not employed in the downtown indicated that they visited the downtown once a week or more.

- Compared to this benchmark of 60%, males, single persons, persons under the age of 35 and over the age of 65, and persons with household income under $25,000 show a greater proclivity to be frequent downtown visitors.

- Persons who venture downtown less often appear to be women, married persons, middle aged persons, and persons from households with incomes greater than $75,000.

3.4 Geographical Distribution of Respondents

Approximately 300 respondents provided their six digit postal code. These codes were entered into a GIS and then using a 2001 master postal code file for Winnipeg, were geo-coded and plotted on a street map of the city. A total of 269 codes were able to be plotted. Locations not able to be plotted are likely those for addresses added to the city after the master postal code file was created. The "pin map" of home addresses of respondents is shown in Figure 1. A summary analysis of distance respondents live from the downtown is found in Table 15. The map suggests the following:

- The spatial distribution of respondents is relatively even spread around the city. This result is not particularly surprising given the centrality of the downtown to the metropolitan region.

- The one segment of the city that represents a so-called "hole in the map" is the Whyte Ridge – Lindenwoods area.

- Analysis of the number of participants found in a series of concentric 2 km rings centred on the intersection of Portage and Donald reveals a valley effect. Approximately 25% of the respondents live within very close proximity to the downtown (within 2 km) while nearly a third of the respondents live more than 8 km from the downtown.

3.5 Participants' Views on What Would Make the Downtown More Attractive

Participants were given the opportunity to provide their opinions about what would make them come downtown more often. This question was structured in an open-ended fashion. A total of 180 participants provided 250 responses. Responses were categorized and then tabulated using a cross-tabulation in order to compare the responses of those who are employed downtown to those who are not. The results are shown in Table 16.

- The two most common responses by both those employed and those not employed downtown were related to a perceived need for more restaurants and entertainment facilities and more diverse shopping.
- Downtown employees were slightly more inclined to mention shopping over food and entertainment (45% vs. 37%). Those not employed downtown placed a greater emphasis on the need for more food and entertainment services.
- Comments regarding public safety, panhandling and cleanliness rank behind those of the provision of more services and more diverse shopping.
- Those who are downtown on a regular basis appear to have a higher degree of awareness and concern over these issues than those who are not employed downtown. For example, some 16% of those employed downtown mentioned public safety whereas only 8% of those not employed downtown saw improved safety and policing as something that would bring them downtown more often.

4.0 Summary and Conclusion

The study was designed to develop a snap shot profile of the downtown pedestrian at key locations within downtown Winnipeg. To that end, the following conclusions can be drawn.

- Pedestrians tend to young. About 1/3 are less than 25 years of age.
- A majority, 60%, are single.
- A large majority, 80%, work outside the home.

- Pedestrians come from both ends of the income spectrum. About ¼ have household incomes in excess of $75,000. More than half live in households that earn less than $40,000.

- A slight majority come downtown via automobile.

- About ½ are downtown because that is where they work.

- About ½ shop while they are downtown; 40% normally patronize food and entertainment venues

- Those not employed downtown visit the downtown on a regular basis (60% come at least once per week)

- Amongst frequent downtown visitors who are not employed downtown, there is a relatively greater presence of males, persons under the age of 35 and persons with household incomes less than $25,000.

- About ¼ live within 2 km of the downtown and 1/3 live more than 8 km from the downtown.

- Perceived need for more diverse shopping and more food and entertainment venues is much greater than the perceived need to improve public safety and limit panhandling activity.

- Those employed downtown perceive a greater need for increased safety but such wishes rank lower on the list than improved shopping and dining / entertainment.

<u>Limitations</u>

The extent to which these statements are representative of downtown pedestrians in general is largely dependent upon the sampling procedure used in the study. One potential area of concern is possible over-representation of respondents under the age of 25. Census data for the City of Winnipeg for the year 2001 shows that the 20-24 year old age group accounts for just 10% of the city's over 19 population whereas 18-24 year olds made up about 1/3 of the sample for this study. Whether this discrepancy is due to some bias in the way participants were selected for the study or it reflects that the downtown population is significantly younger than the population of the city as whole is a topic worthy of further exploration.

A second note of caution pertains to the geographical distribution of interview locations. Readers are reminded that the study was designed to collect information from certain key areas of the downtown and so care should be taken not to extrapolate results to other areas of the downtown not covered by the study.

Recommendations for Future Research

The results of the study suggest a number of avenues for further investigation. While this study provides insight into the frequency of downtown visits and the types of activities, further research could extend this knowledge base to include information about the spatial extent of downtown activity by pedestrians. For example, it would be valuable to know how far people venture away from their initial access point (e.g., a bus stop or parking spot), number of businesses they visit and whether such visits were pre-planned or were spontaneous.

Similar questions could be asked by those employed in the downtown. Since about ½ of pedestrians appear to be downtown workers, further research on this sub-group could examine the timing of and spatial extend of pedestrian activity and the extent to which such activity results in the purchase of goods and services from downtown businesses.

Lastly, consideration might be given to expanding the geographical scope of the study by sampling pedestrians in other parts of the downtown not covered by this study. Such areas might include the area of Portage and Main, along Broadway Avenue and the Exchange District. While the latter is beyond the boundaries of the Downtown Biz, interviewing in that area would gauge the extent to which pedestrians transfer between the main shopping venues along Portage Avenue and those in the Exchange.

APPENDIX

Table 1
Location of Interview

Location of Interview	Frequency	%	% (excluding missing cases)
MTS Centre Walkway- pre Game	61	18.2	21.3
MTS Centre Walkway- weekday	140	41.7	49.0
University of Winnipeg- weekday	1	.3	.3
TD Bank- food court- weekday	1	.3	.3
Investors Building- weekday	43	12.8	15.0
Portage Place	40	11.9	14.0
Sub Total	286	85.1	100.0
Missing Cases	50	14.9	
TOTAL (including missing cases)	336	100.0	

Table 2
Day of Interview

Day of Week	Frequency	%	% (excluding missing cases)
Tuesday	47	14.0	15.5
Wednesday	134	39.9	44.1
Thursday	1	.3	.3
Friday	84	25.0	27.6
Saturday	38	11.3	12.5
Sub Total	304	90.5	100.0
Not recorded	32	9.5	
Total	**336**	**100.0**	

Table 3
Time of Interview

Time of Interview	Frequency	%	% (excluding missing cases)
9:30am-12:30pm	68	20.2	22.3
12:30pm-5:00pm	139	41.4	45.6
5:00pm-9:00pm	98	29.2	32.1
Sub Total	305	90.8	100.0
Not recorded	31	9.2	
TOTAL	336	100.0	

Table 4
Age Distribution of Respondents

Age Group	Frequency	%
18-24	106	32.6
25-34	61	18.8
35-44	60	18.5
45-54	56	17.2
55-64	28	8.6
65 plus	13	4.0
Refused	1	.3
Total	325	100.0

Table 5
Marital Status of Respondents

Marital Status	Frequency	%
Married	108	33.9
Single	195	61.1
Common Law	5	1.6
Divorced	5	1.6
Refused	6	1.9
Total	319	100.0

Table 6
Marital Status by Presence of Children Under the Age of 18[1]

Marital Status	No Children Under 18 at Home		Have Children Under 18 at Home		TOTAL
	#	%	#	%	#
Married / Common Law	52	50.9	50	49.1	102
Single	132	79.5	34	20.5	166
Divorced	4	80.0	1	20.0	5
Refused	0	0.0	5	100.0	5
Total	191	68.2	91	32.5	280

1. Corresponding totals in Tables 5 and 6 differ due to respondents who did not answer all questions on the survey.

Table 7
Distribution of Respondents by Occupation

Occupation	Frequency	%
Professional/Technical	59	23.1
Service	58	22.7
Administration/Supervisor	27	10.6
Retail/Sales	25	9.8
Skilled Worker	22	8.6
Labourer	19	7.5
Clerical/Secretarial	17	6.7
Student	17	6.7
Social Work	5	2.0
Other Sales	3	1.2
Government	2	0.8
Business Owner	1	0.4
Total	**255**	**100.0**

Table 8
Income Distribution by Marital Status

Household Income	Married / Common Law		Single		Total	
	#	%	#	%	#	%
Under $12,500	8	8.3	24	15.1	32	12.5
$12,500-$24,999	17	17.7	48	30.2	65	25.5
$25,000-$39,999	14	14.6	33	20.8	47	18.4
$40,000-$59,999	14	14.6	18	11.3	32	12.5
$60,000-$74,999	11	11.5	7	4.4	18	7.1
$75,000-$99,999	15	15.6	8	5.0	23	9.0
Over $100,000	17	17.7	21	13.2	38	14.9
TOTAL	96	100.0	159	100.0	255	100.0

Table 9
Mode of Travel to the Downtown

Mode of Travel	Frequency	%
Car	164	51.4
Bus	78	24.5
Walked	59	18.5
Car pool	12	3.8
Bicycle	2	0.6
Taxi	2	0.6
Downtown resident-walked	1	0.3
Wheelchair	1	0.3
Total	319	100.0

Table 10
Reasons for Being Downtown on Day of Interview

Primary Reason for Being Downtown	Responses Given		% of Respondents
	#	%	
Work	162	42.6	51.6
Entertainment (e.g., MTS Centre, Theatre)	58	15.3	18.5
Shopping	40	10.5	12.7
Restaurant Dining	34	8.9	10.8
Appointment with Professional	19	5.0	6.1
Visit Friends	13	3.4	4.1
Use Services (Bank, Employment, Cleaners)	11	2.9	3.5
Transit/Passing Through/Browsing	11	2.9	3.5
University/School	9	2.4	2.9
Light Meal/Snack	8	2.1	2.5
Conference/Business Traveller	6	1.6	1.9
Downtown Resident	6	1.6	1.9
Exercise	3	0.8	1.0
TOTAL	**380**	**100.0**	**n/a**

Table 11
Other Downtown Activities Mentioned

Activity	Responses Given		% of Respondents
	#	%	
Shopping	139	21.7	50.7
Restaurant Dining	110	17.2	40.1
Entertainment (e.g., MTS Centre, Theatre)	110	17.2	40.1
Appointment with Professional	54	8.4	19.7
Visit Friends	47	7.3	17.2
Light Meal/Snack	41	6.4	15.0
Transit/Passing Through/Browsing	39	6.1	14.2
Work	35	5.5	12.8
Use Services (Bank, Employment, Cleaners)	34	5.3	12.4
Conference/Business Traveller	17	2.7	6.2
University/School	6	0.9	2.2
Exercise	4	0.6	1.5
Downtown Resident	3	0.5	1.1
Social Purposes	1	0.2	0.4
TOTAL	640	100.0	

Table 12
Frequency of Downtown Visits

	Frequency	%
Daily	135	41.9
A few times a week	55	17.1
Weekly	23	7.1
A few times a month	33	10.2
Monthly	5	1.6
Less than once per month	29	9.0
I work downtown 5 days a week	42	13.0
Total	322	100.0

Table 13
Frequency of Visits by Persons not in the Downtown Workforce

	Frequency	%
Daily	45	29.2
A few times a week	34	22.1
Weekly	13	8.4
A few times a month	29	18.8
Monthly	5	3.2
Less than once per month	28	18.2
Total	154	100

Table 14
Frequency of Visits by Non-Downtown Workers Controlling for Attributes of the Visitors

Attribute of Visitor	# of respondents	Frequency of Downtown Visits		
		At Least Once per Week %	At Least Once per Month %	Less than Once per Month %
AGE				
Under 35 years old	65	73.8	18.5	7.7
45-54 years old	26	30	34.8	34.6
55 and older	29	65.5	10.3	24.2
Marital Status				
Married	49	34.7	28.6	36.7
Single	92	70.7	26.7	8.7
Gender				
Females	47	53.2	17.0	29.8
Males	87	65.5	25.3	9.3
Household Income				
<$25,000	51	70.5	15.7	13.7
>$75,000	25	48.0	24.0	28.0
OVERALL	**154**	**59.0**	**21.8**	**17.9**

Table 15
Distance of Participants' Residences from the Downtown

Distance from Portage and Donald	Frequency	%	Cumulative %
Less than 2 km	65	24.2	24.2
2 - 3.9 km	26	9.7	33.8
4 - 5.9 km	43	16.0	49.8
6.0 - 7.9 km	50	18.6	68.4
8 or more km	85	31.6	100.0
TOTAL	269	100.0	

Table 16
Participants' Opinions on What Would Make the Downtown More Attractive

Item Mentioned	Employed Downtown		Not Employed Downtown		All Respondents	
	#	% of Participants	#	% of Participants	#	% of Participants
Food/Entertainment	34	37.4	48	53.9	82	45.6
More Diverse Shopping	41	45.1	34	38.2	75	41.7
Policing/Safety	15	16.5	7	7.9	22	12.2
Transportation/Parking	15	16.5	6	6.7	21	11.7
Arts/Culture	4	4.4	9	10.1	13	7.2
Less Panhandling	8	8.8	3	3.4	11	6.1
Greater Cleanliness	5	5.5	3	3.4	8	4.4
Child-oriented Facilities	3	3.3	3	3.4	6	3.3
Housing	1	1.1	2	2.2	3	1.7
Tours/Help Services	1	1.1	1	1.1	2	1.1
Social Services/Drop	1	1.1	1	1.1	2	1.1
Handicap Access	0	0.0	2	2.2	2	1.1
Sidewalk Sales	0	0.0	2	2.2	2	1.1
Rest Areas	1	1.1	0	0.0	1	0.6
# of Participants	**91**		**89**		**180**	

Figure 1
Geographical Location of Survey Participants