



April 22nd, 2021

Public Survey Report

Conducted by the Old Strathcona
Business Association (OSBA)



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PURPOSE

Understanding the perceptions and habits of the Edmonton public in Old Strathcona.

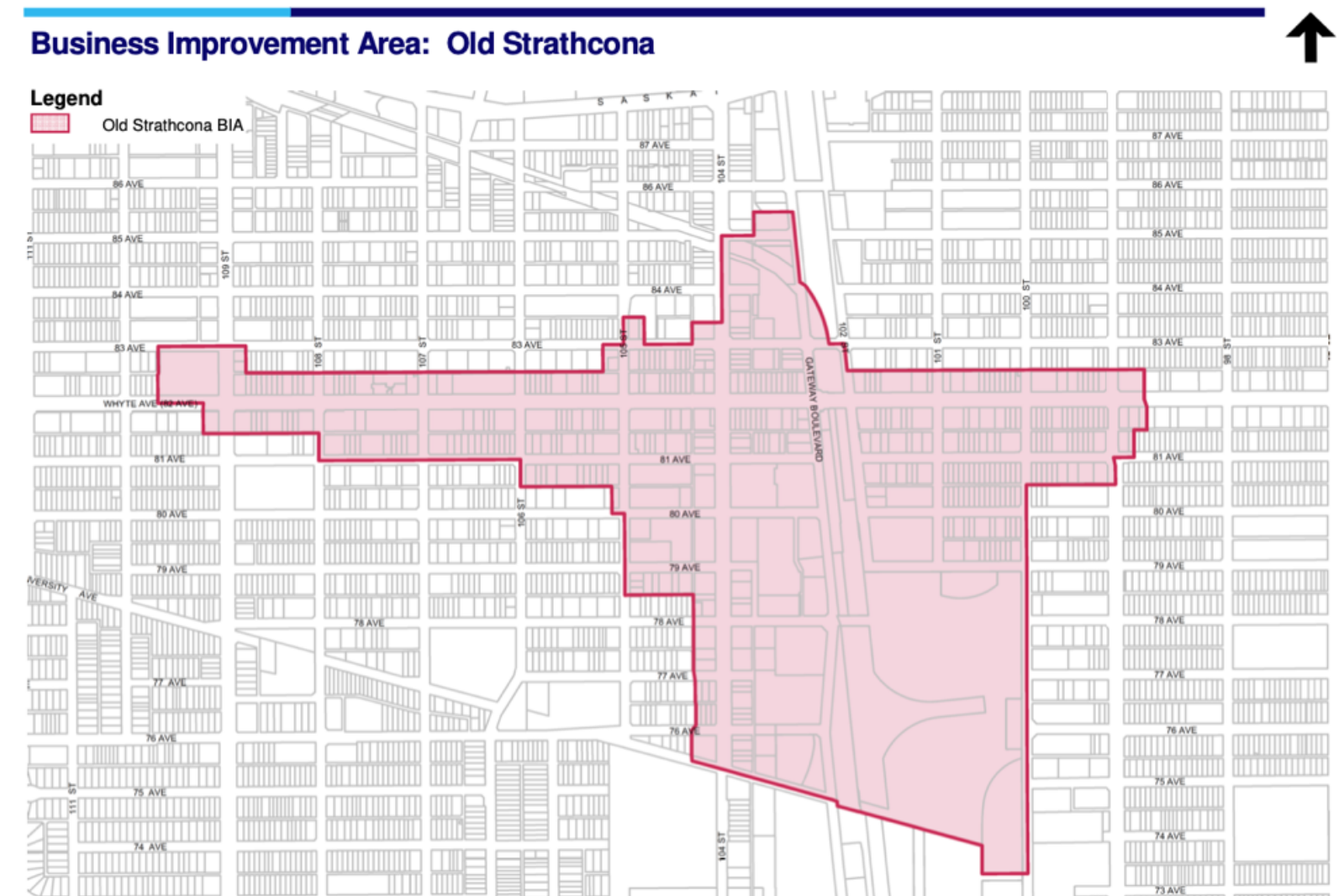
PURPOSE

Understanding the Public and Old Strathcona



This survey was conducted for the purpose of better understanding the public's perceptions and habits regarding the Old Strathcona area as well as the nearly 600 businesses that operate within the Old Strathcona BIA. [pictured right]

The data collected will be used to better serve patrons of the area, attract new businesses, and provide existing businesses with useful information about their customer base.





RESEARCH METHODOLOGY

How the survey was conducted.

How We Conducted the Survey



Conducted as an online questionnaire by Trend Research, [pictured right] survey responses were collected between the 7th and 21st of March, 2021. In total, 800 responses were collected with a demographic breakdown similar to that of the general Edmonton population.

Respondents were asked to ignore the effects of COVID-19, and instead respond as though it was a "normal year." This was done to ensure the results remain relevant post-pandemic.

Old Strathcona Online Survey

D1

March 2, 2021

To be administered online to Edmonton Residents

We are conducting research with Edmonton area residents about their shopping habits.

To begin with ...

1. Have you visited the Old Strathcona shopping district, including Whyte Avenue and the surrounding area in the past five years?

1 – Yes
2 – No
9 – Don't know / not sure
SKIP TO Q.7
SKIP TO Q.7
2. **IF YES** ... Before the start of the COVID-19 pandemic in March 2020, how frequently did you visit the Old Strathcona shopping district?

1 – Daily
2 – Weekly
3 – Monthly
4 – A few times a year
5 – Yearly
6 – Less than once a year
9 – Don't know / not sure
SKIP TO Q.7
SKIP TO Q.7
3. **IF AT LEAST YEARLY** ... Please indicate which of the following types of businesses or events you have visited in the Old Strathcona shopping district in the past five years? **RANDOMIZE**



RESULTS ANALYSIS

Notable insights and summaries
for each question asked.

QUESTION #1

Screening Question

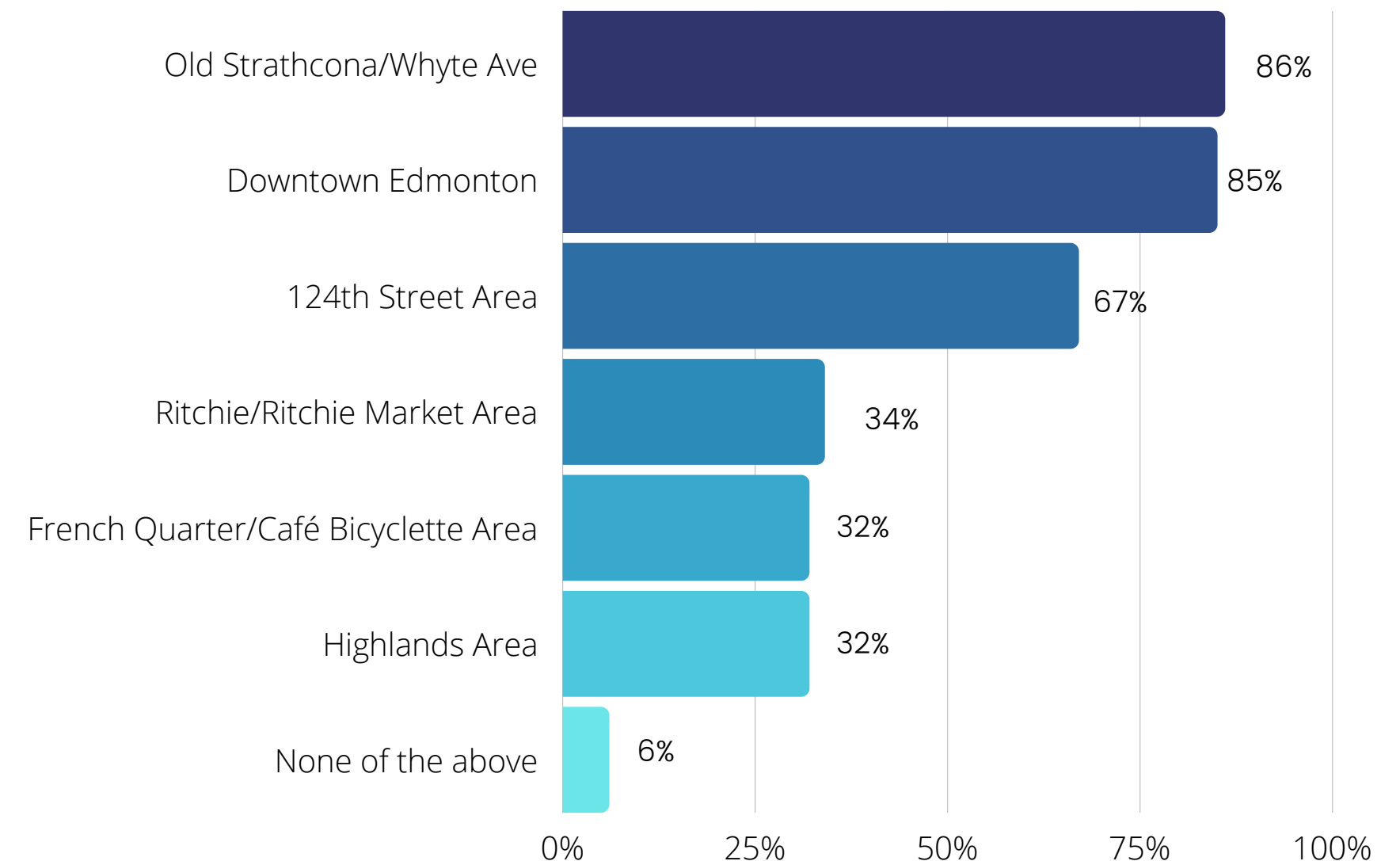
Have you visited the following districts in the past five years?



Summary + Topline Findings

This screening question was put in place in order to filter out respondents who do not have a significant level of experience with Old Strathcona area. These individuals were then passed to question #9.

Of n=800, 86% of respondents have been to Old Strathcona in the past five years. This is the highest percentage of all options available, including Downtown Edmonton.



Main Street Shopping Center Preferences

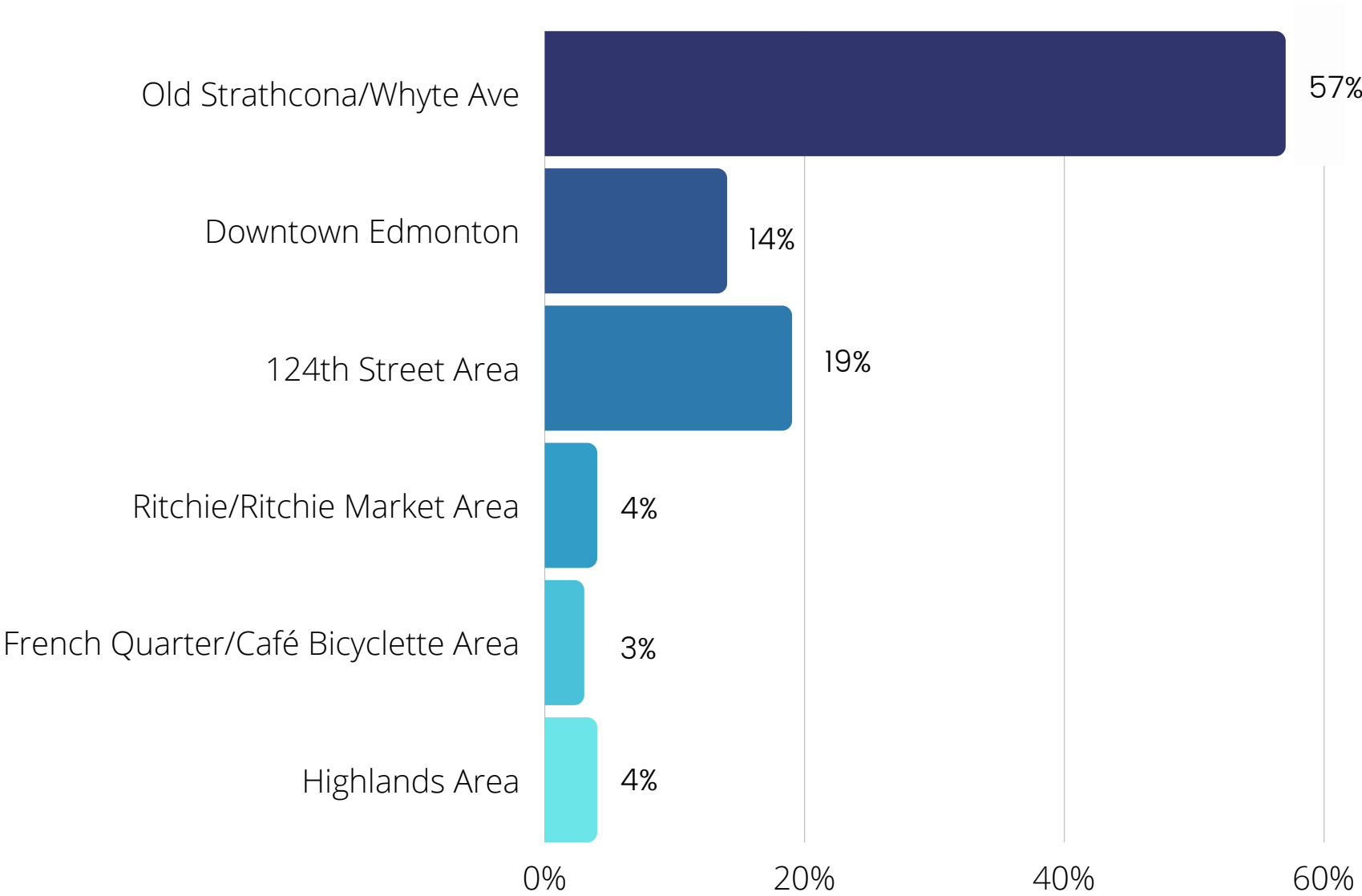


Of the districts you have visited, which one would be your favourite?

Summary + Topline Findings

This was a direct follow-up question to question one. While the first question determined which area respondents are visiting most frequently, this question determines which area respondents prefer to visit when given the option.

Of n=691, 57% of respondents prefer Old Strathcona over all other supplied options. When comparing the results of question #1, both Downtown Edmonton and 124th Street lose more than 3x their previous respondents.



QUESTION #3

Frequency of Old Strathcona Visits

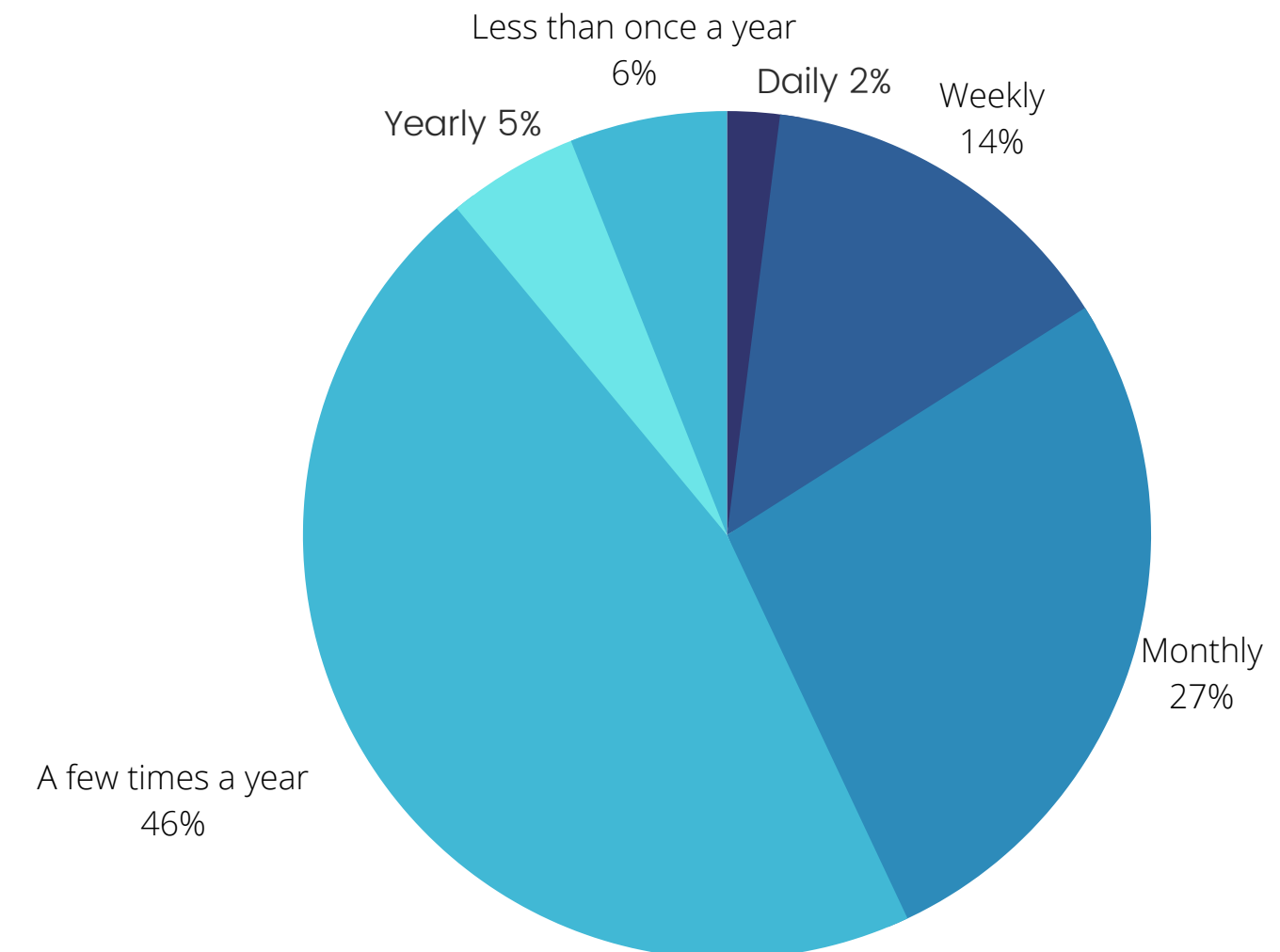


Before the start of the pandemic in March 2020, how frequently did you visit the Old Strathcona Area?

Summary + Topline Findings

This question acted as both insight and a way to filter out respondents who have visited the district less than once a year. These individuals were passed to question #9.

Of n=691, 43% of respondents visit Old Strathcona at least once a month - with the majority visiting a few times a year.



Frequently Visited Business Types

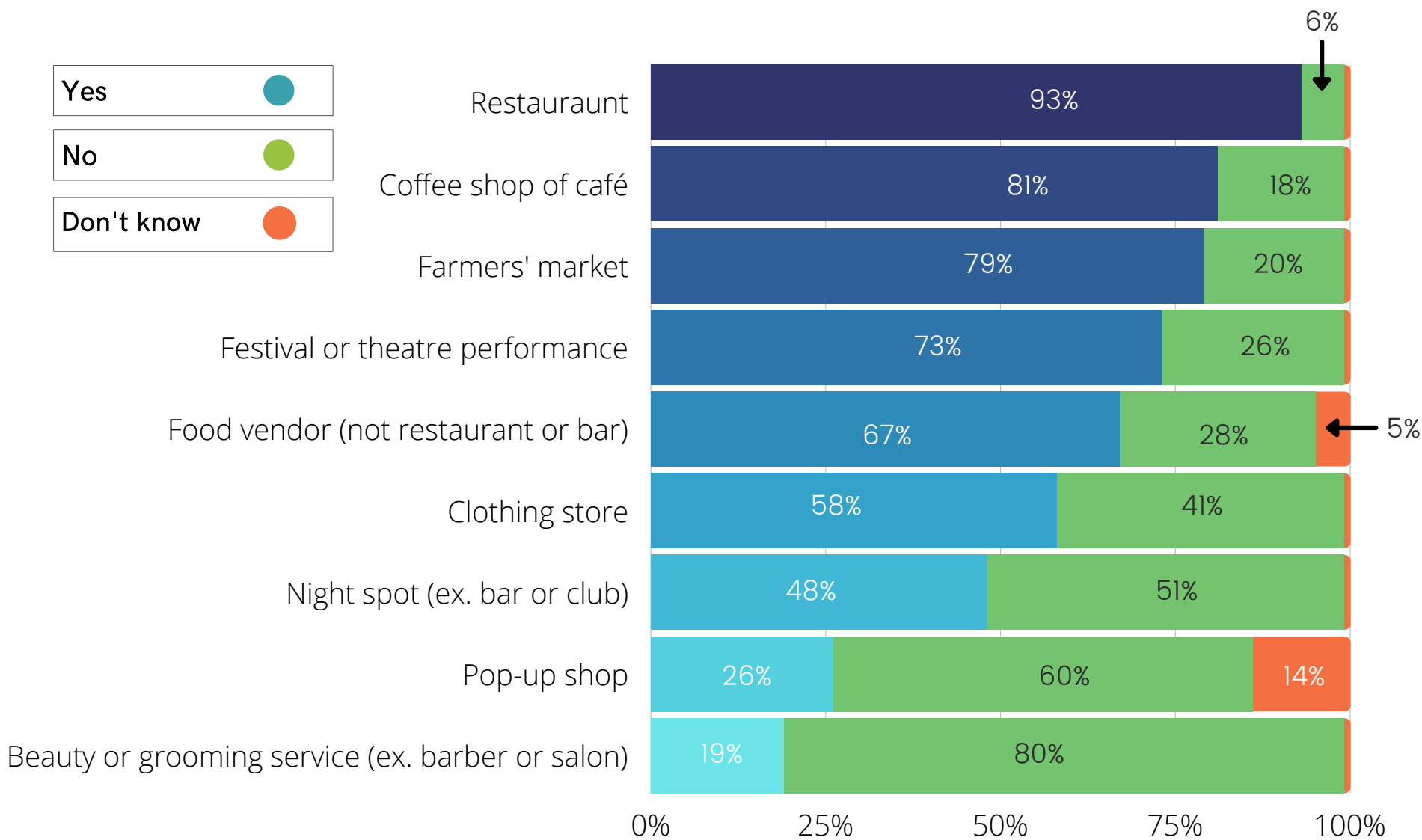


Please indicate which of the following types of business or events you have visited in Old Strathcona in the past five years?

Summary + Topline Findings

This question was given only to those who visit Old Strathcona at least once a year. They were then asked to indicate which businesses/events they have, or have not visited over the past five years. This five year span was given in order to better avoid the effects of the COVID-19 pandemic. The graph on this page represents their responses to visiting each category of business or event over the past 5 years.

Of n=650, the majority of respondents have visited a restaurant, coffee shop, farmers' market, festival/theatre performance, food vendor, or retail clothing store. 14% were unsure if they have attended a "Pop-up" shop.



Store Browsing Tendencies



When you go to Old Strathcona, do you typically.. visit one or two shops, but not walk around, or walk around and explore several shops?

Summary + Topline Findings

Of n=650, nearly three quarters of respondents walk around and explore several shops when they visit Old Strathcona.

Visit one or two shops, but not walk around
23%

Don't know/not sure
3%

Walk around and explore several shops
74%

Browsing tendencies of Respondents in Old Strathcona

Preferred Mode of Transportation

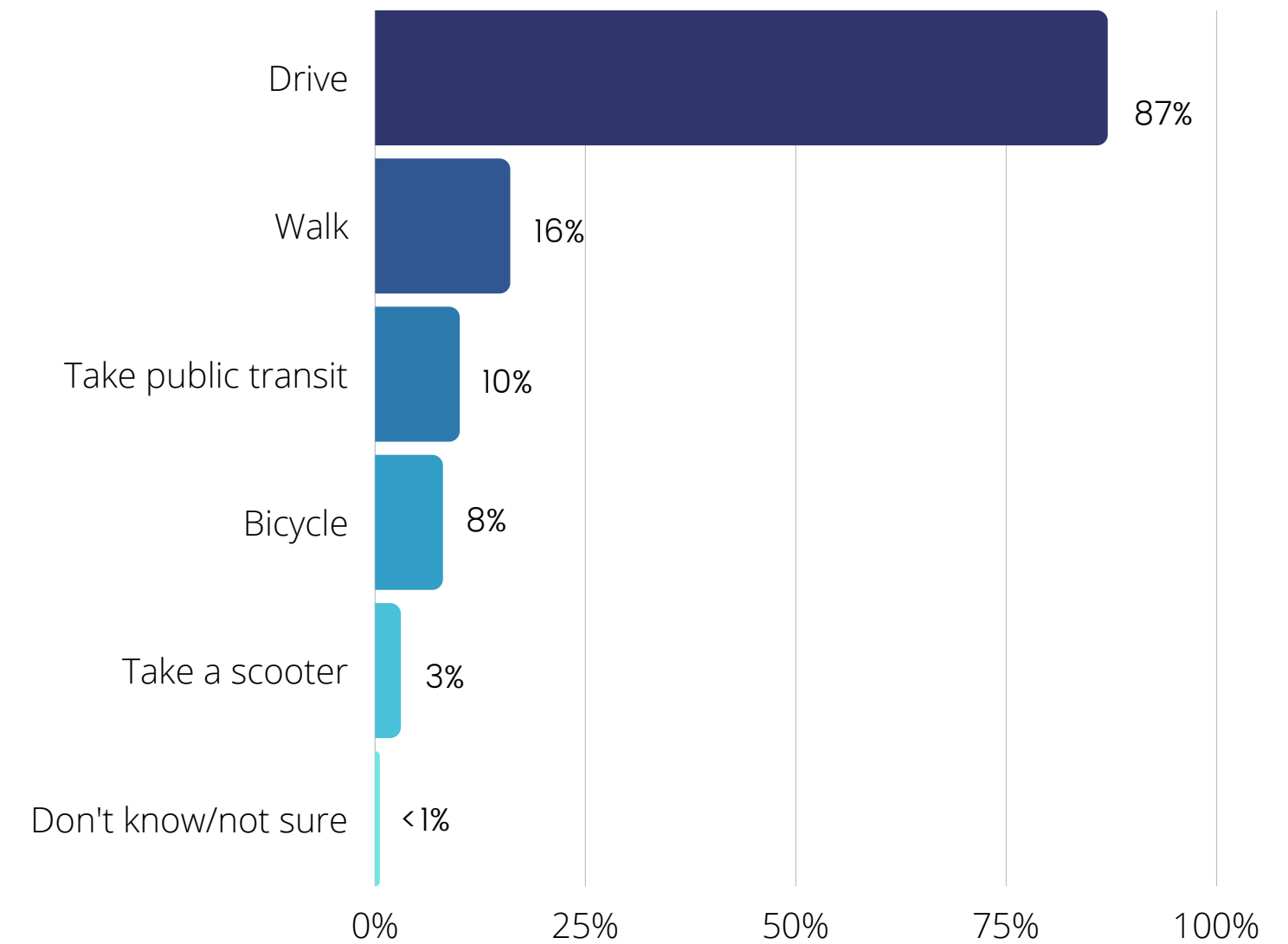
How do you usually travel to Old Strathcona?



Summary + Topline Findings

Accessibility is essential for a walkable mainstreet. For this question, respondents were able to select multiple options in their answer. Of course, mode of transportation will inevitably change depending on the distance between the respondent and Old Strathcona. Additional analysis will be required.

Of n=650, 87% of the respondents regularly drive to the district. Walking is generally preferred over public transit.



QUESTION #7

Grouping Visitors

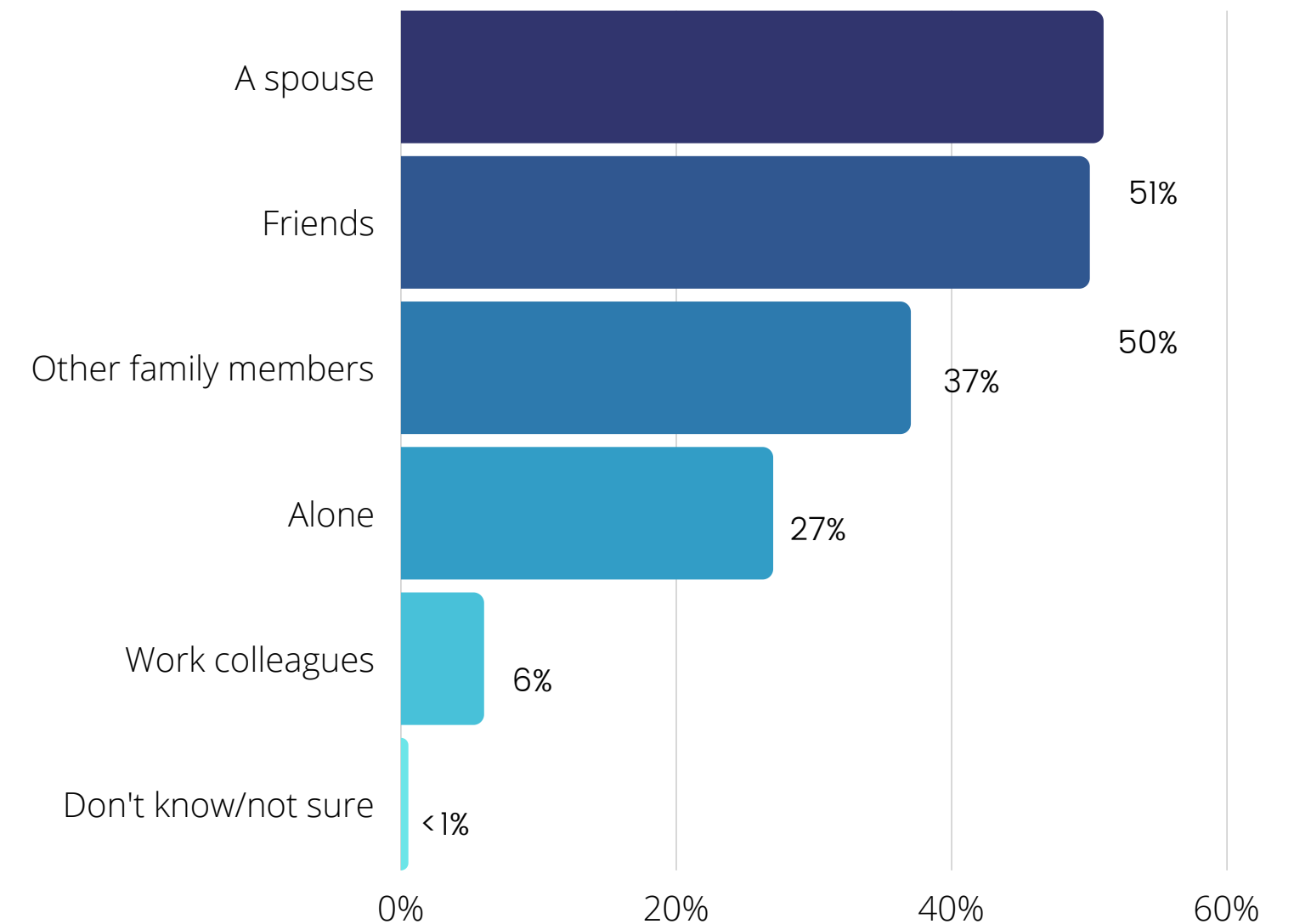
When you travel to Old Strathcona, who do you typically come with?



Summary + Topline Findings

For this question, respondents were given the ability to select multiple options for their answer.

Of n=650, the majority of respondents visit the district with either a spouse or friends.



Top 3 Reasons for Visiting

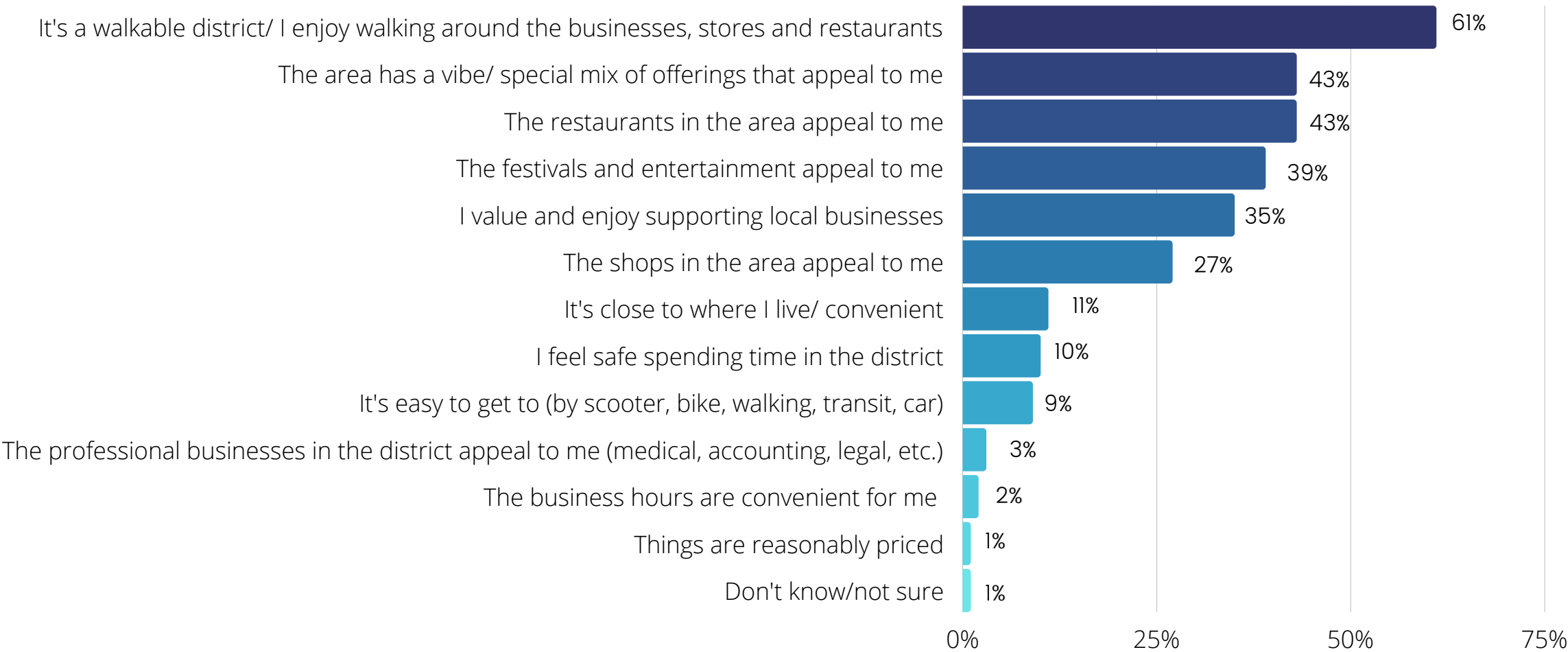


Here is a list of reasons why you might visit Old Strathcona. Please pick the top three reasons why you enjoy visiting Old Strathcona.

Summary + Topline Findings

For this question, respondents were given a list of options and asked to identify their top three reasons for visiting the district.

Of n=650, the top three reported reasons for visiting Old Strathcona is the walkability, business mix, vibe/atmosphere, and restaurants available.



Top 3 Reasons for Not Visiting

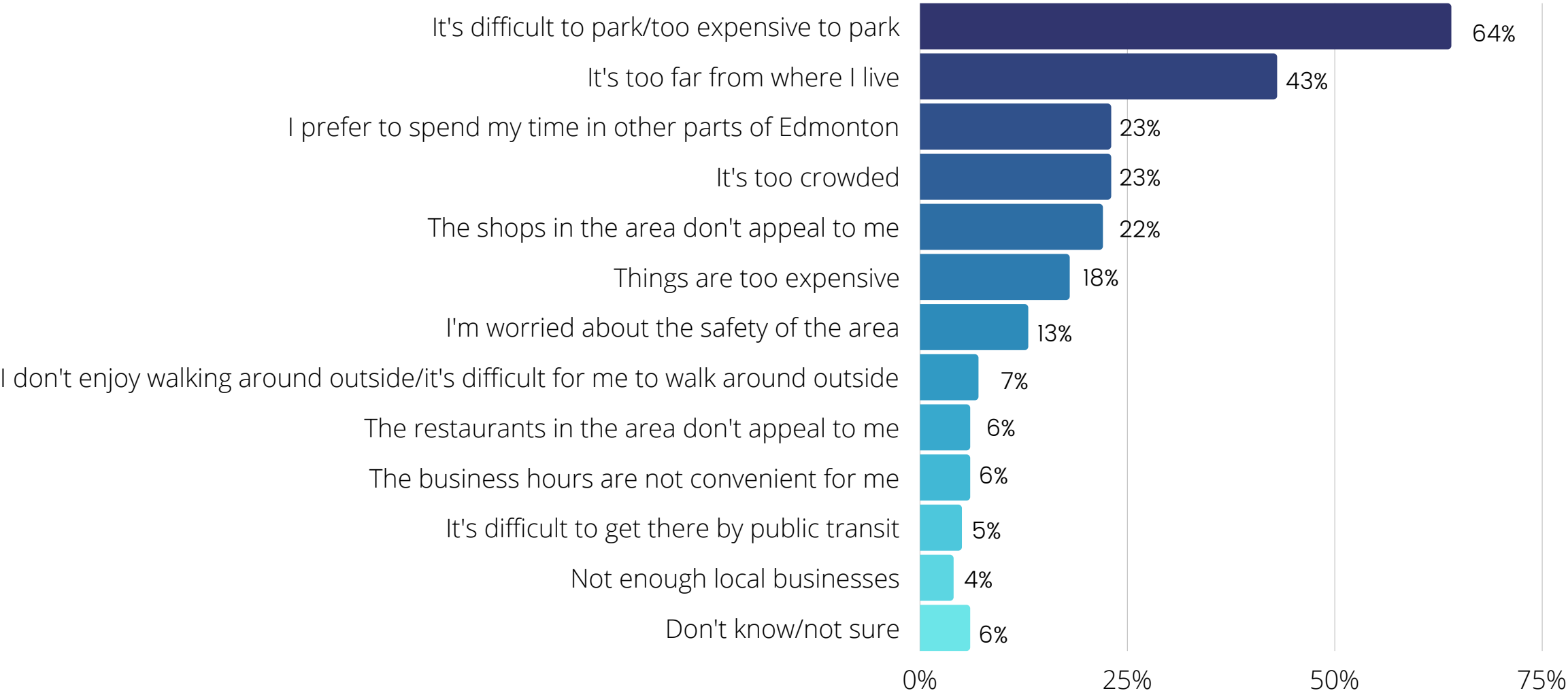


Here is a list of things that may be preventing you from visiting Old Strathcona. Please pick the top three reasons why you have not recently visited the Old Strathcona shopping district.

Summary + Topline Findings

This question was reserved for those who answered "No" to question one, or "Less than one year" in question three.

Of n=150, the main obstacle to visiting Old Strathcona is related to perceptions around parking.



QUESTION #10

Desired New Businesses

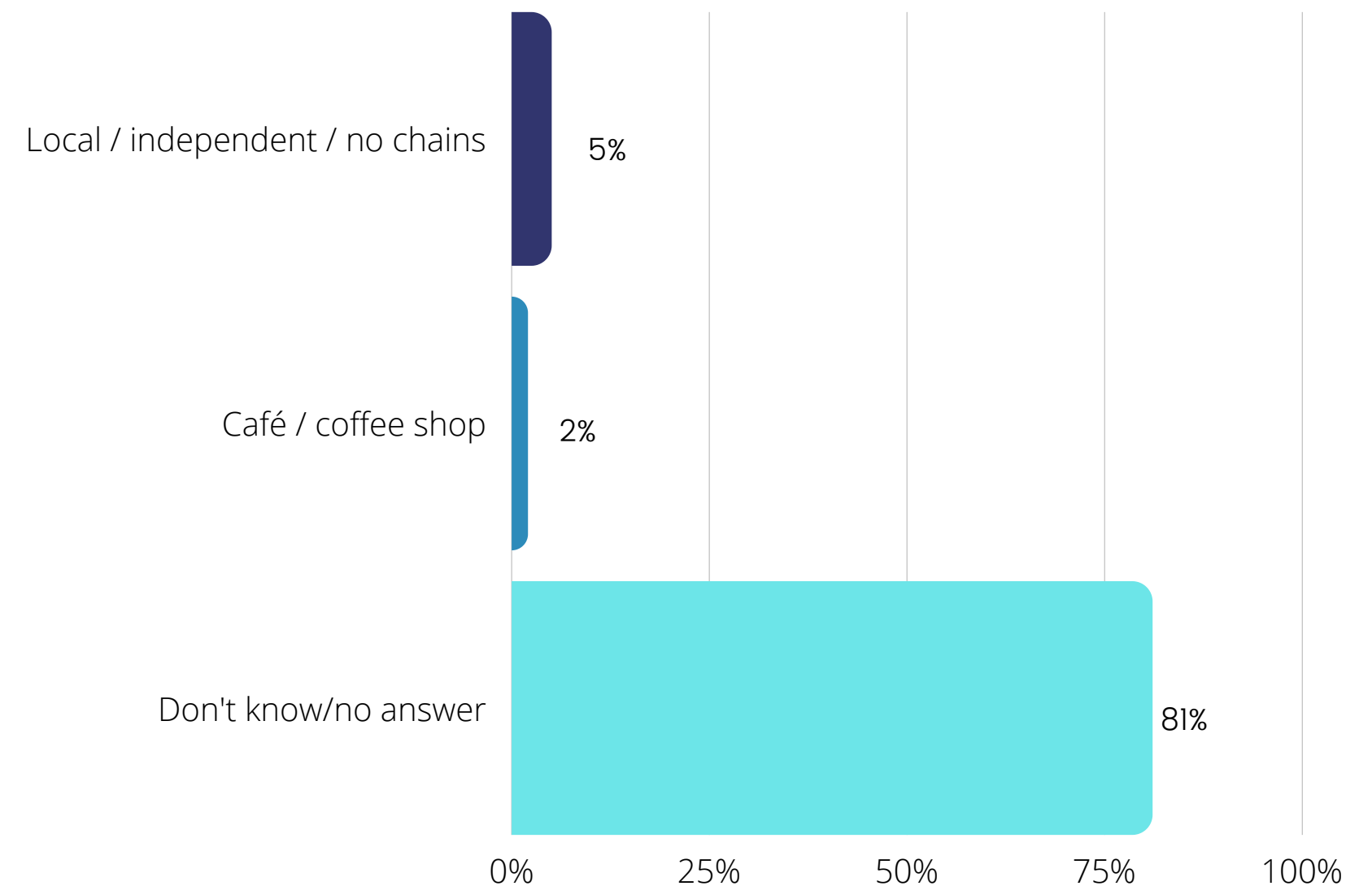
Is there a new type of business you would like to see open in Old Strathcona?



Summary + Topline Findings

All respondents were given the ability to input their own unique answers to this question. Due to this, very few individual business types stand out as an overwhelming need. However, it is clear that many of them would like to see local or independent businesses be the staple of Old Strathcona.

Of n=800, 5% mentioned their desire for more independent businesses and less mainstream chains.





CROSS-REFERENCES

Comparing multiple questions for additional insight.

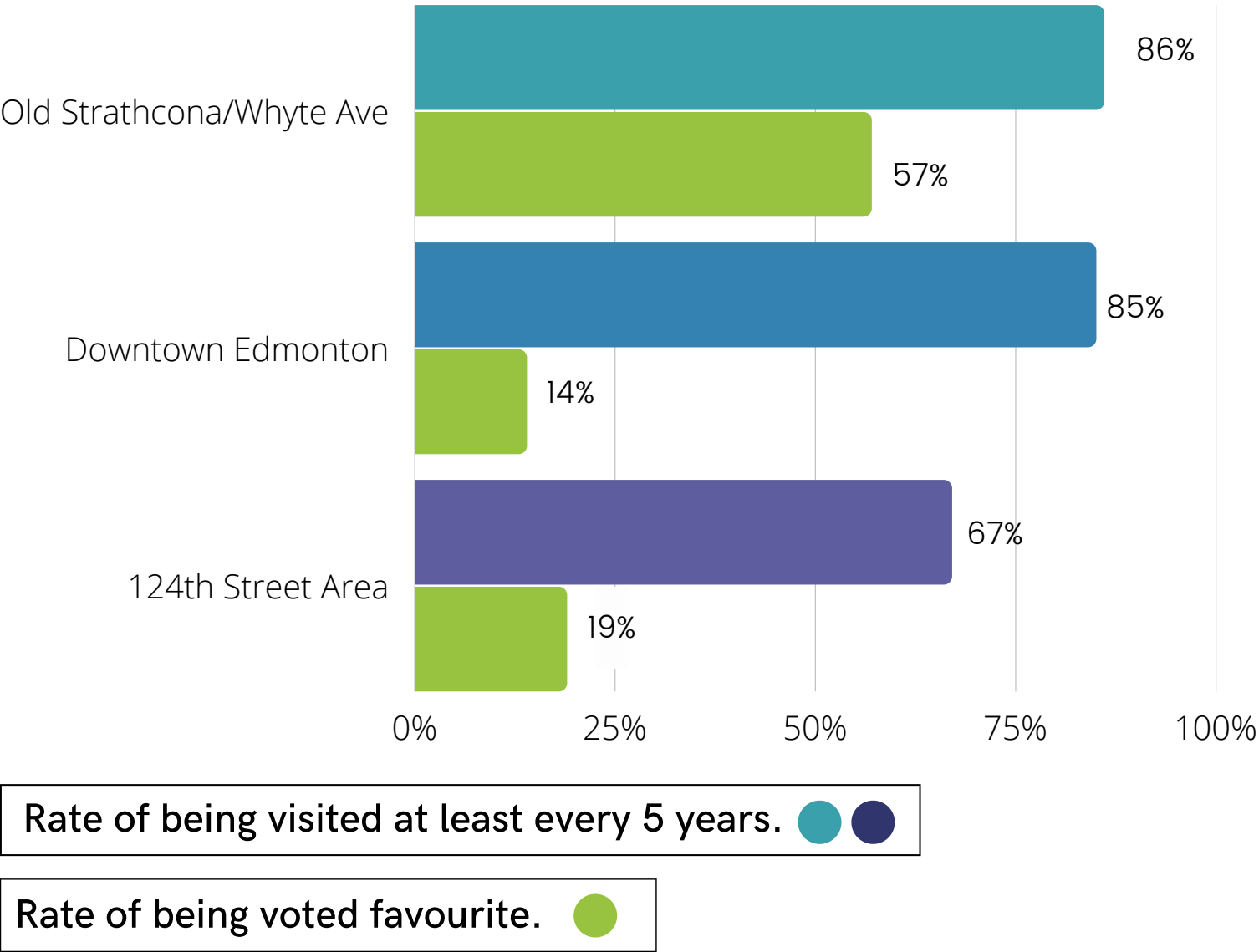
Comparing Most Visited Districts vs Favourite Districts



Purpose: To determine if respondents visit these districts because they want to or because they have to.

Comparing question #1 and #2.

Compiling the results of both question #1 and #2, we can see that both Downtown Edmonton and 124th Street lose more than 3x their original visitation rate when compared to their rating for favouritism. In comparison, Old Strathcona scored much better.



Comparing Distance from Old Strathcona and Preferred Mode of Transportation

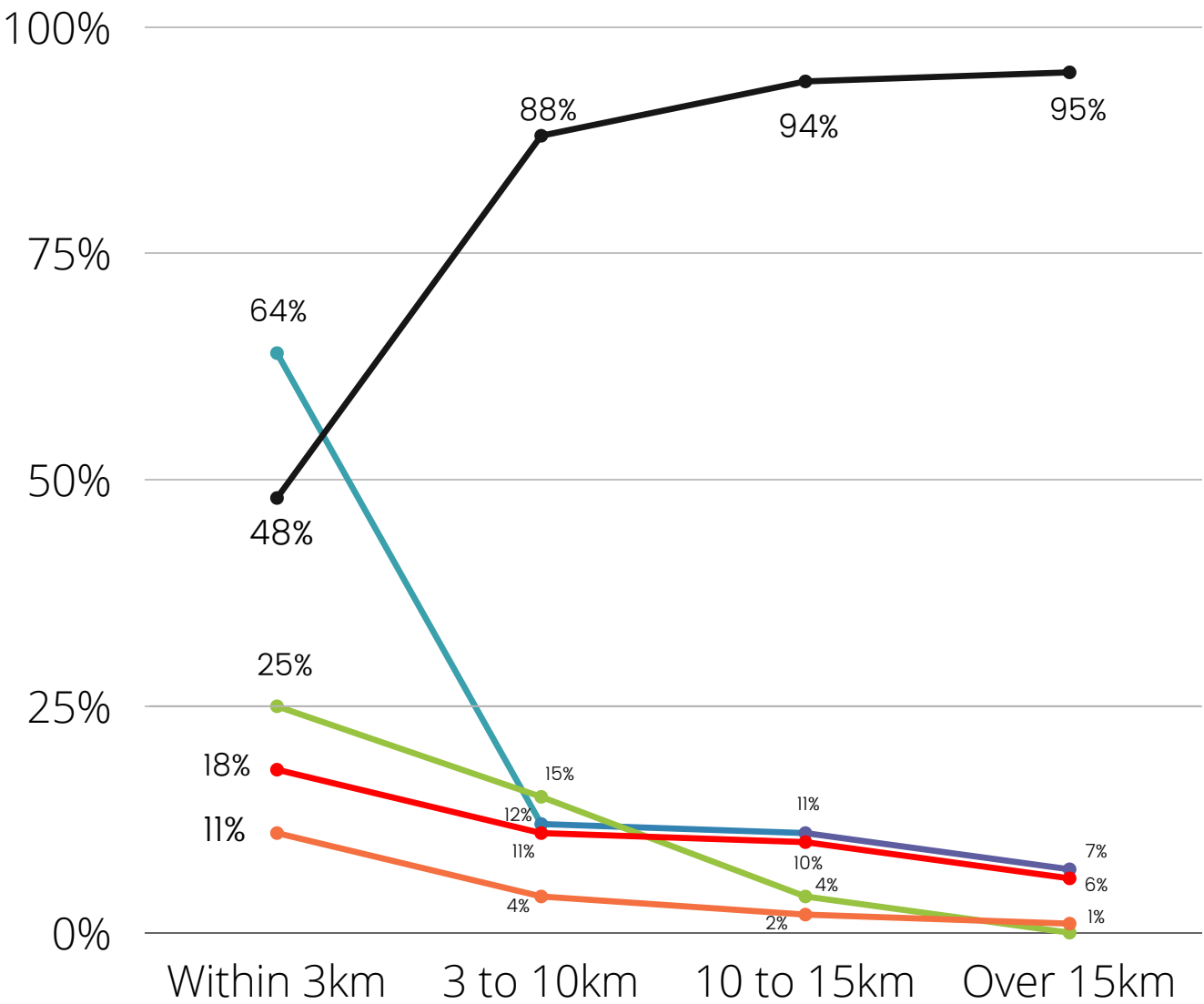


Purpose: Understanding how respondents travel to Old Strathcona might allow us to better educate members of the public on the various transportation methods in their area.

Comparing the distance from Old Strathcona in the demographics section to results of question #6.

Of n=650, driving was the only positive correlation with regards to distance. Every other mode of transportation decreased in frequency of use as the distance from Old Strathcona increased.

Walk	●
Bicycle	●
Scooter	●
Drive	●
Public Transit	●



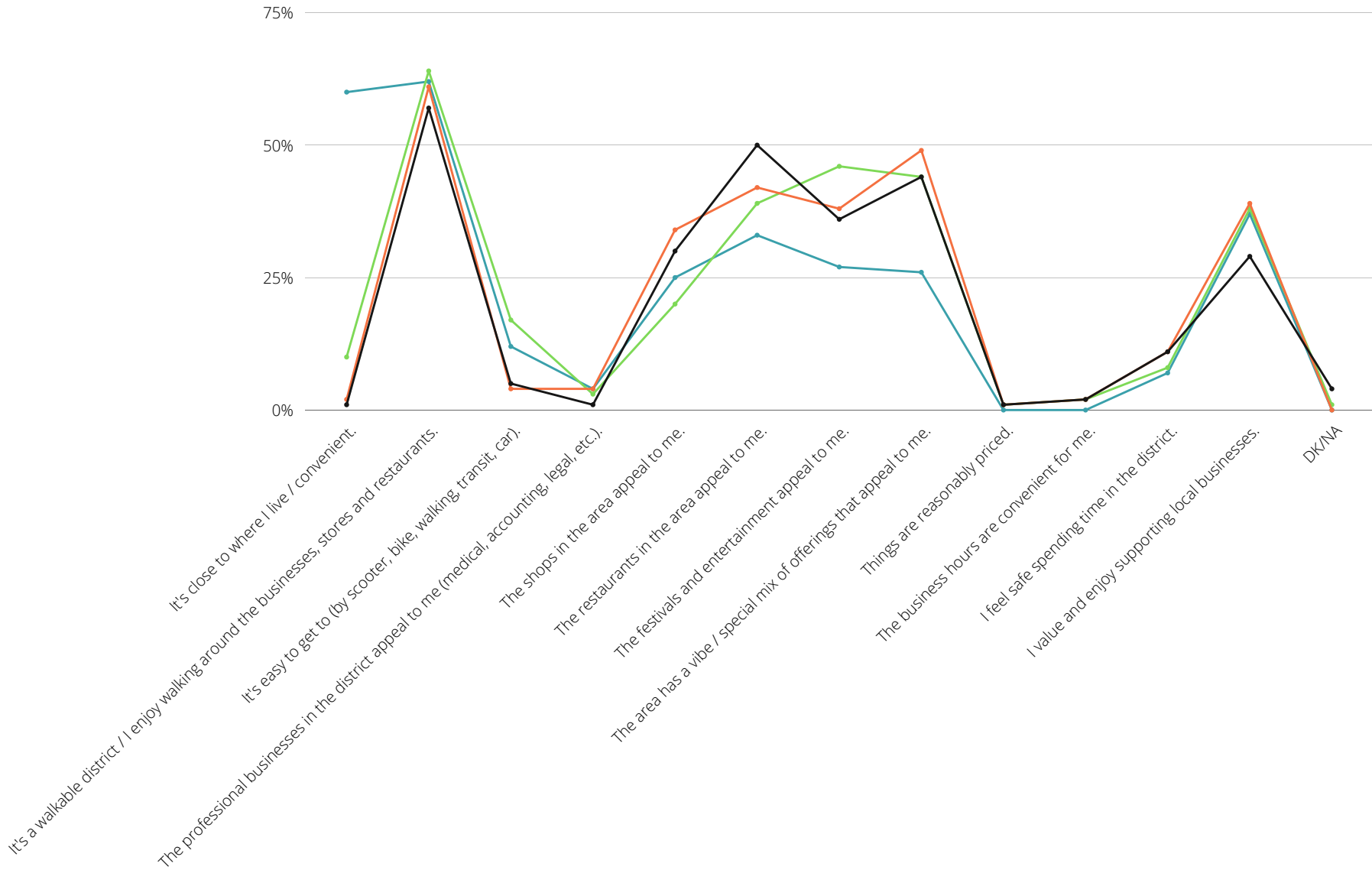
Comparing Distance from Old Strathcona and Reason for Visiting



Purpose: Those who live farther away from Old Strathcona might perceive it more as "destination district" and might have different reasons for visiting.

Comparing the distance from Old Strathcona in the demographics section with the results of question #8.

Once plotted on a trend graph, it becomes clear that respondents from all distances had similar reasons for visiting Old Strathcona. With the largest variation in data points being their opinions on festivals and entertainment.



Comparing Distance from Old Strathcona and Reason for Visiting



Purpose: Those who live farther away from Old Strathcona might perceive it more as "destination district" and might have different reasons for visiting.

Comparing the distance from Old Strathcona in the demographics section with the results of question #8.

The following table shows the data from the previous page. Respondents were given the ability to select their top three reasons for visiting. The percentages reflect their responses.

Distance vs Reason for Visiting				
Reason for Visiting	Within 3km	3 to 10km	10 to 15km	Over 15km
It's close to where I live / convenient.	60%	10%	2%	1%
It's a walkable district / I enjoy walking around the businesses, stores and restaurants.	62%	64%	61%	57%
It's easy to get to (by scooter, bike, walking, transit, car).	12%	17%	4%	5%
The professional businesses in the district appeal to me (medical, accounting, legal, etc.).	4%	3%	4%	1%
The shops in the area appeal to me.	25%	20%	34%	30%
The restaurants in the area appeal to me.	33%	39%	42%	50%
The festivals and entertainment appeal to me.	27%	46%	38%	36%
The area has a vibe / special mix of offerings that appeal to me.	26%	44%	49%	44%
Things are reasonably priced.	0%	1%	1%	1%
The business hours are convenient for me.	0%	2%	2%	2%
I feel safe spending time in the district.	7%	8%	11%	11%
I value and enjoy supporting local businesses.	37%	38%	39%	29%
DK/NA	0%	1%	0%	4%

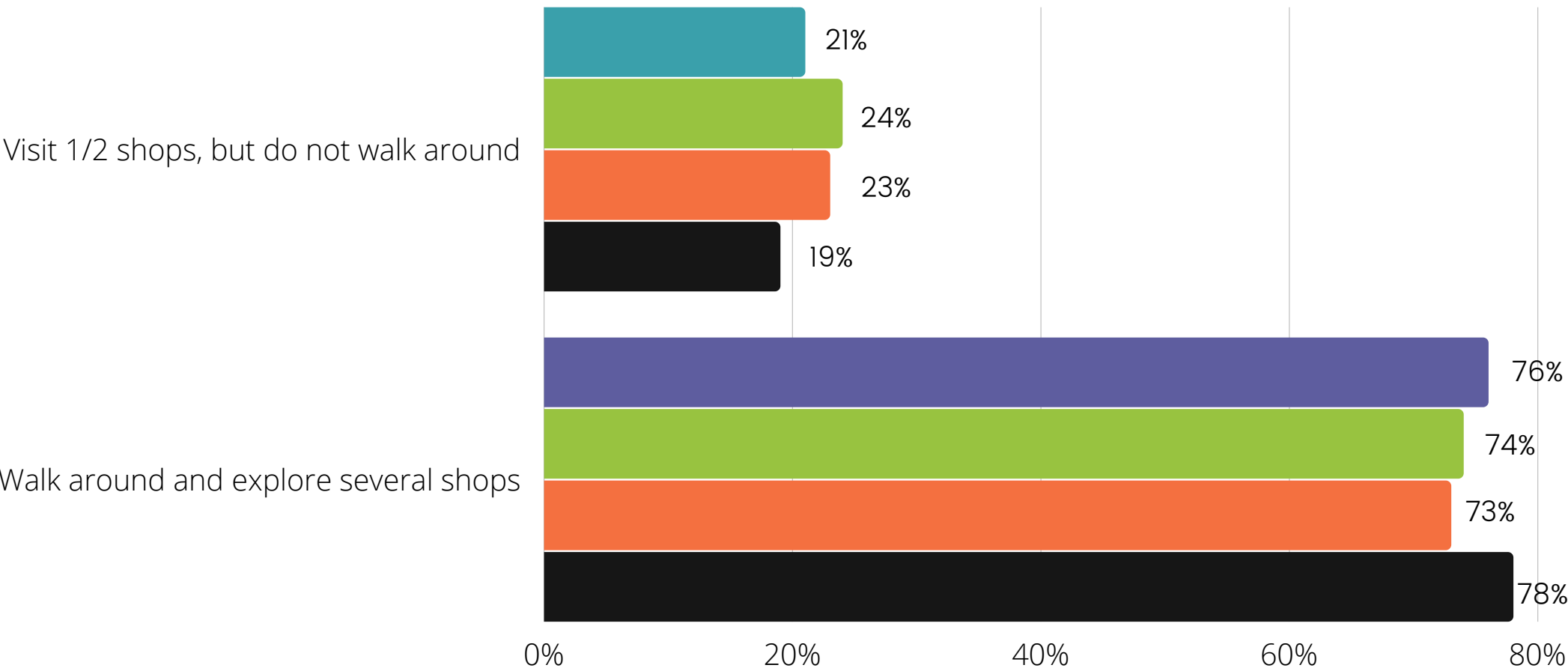
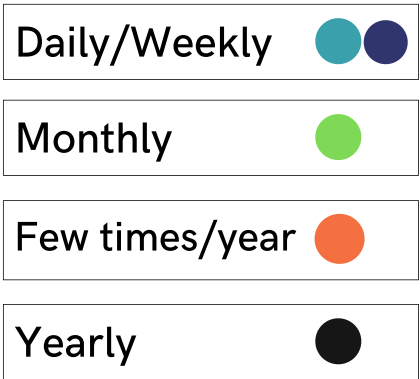
Comparing Frequency of Visiting and Tendency to Walk Around



Purpose: Understanding the different tendencies between frequent/infrequent visitors might be valuable.

Comparing question #3 and #5.

Referencing the graph to the right, very little correlation or variation exists between the number of visits to Old Strathcona and the "browsing" tendencies of respondents.





DEMOGRAPHICS

Demographic breakdown of
respondents.

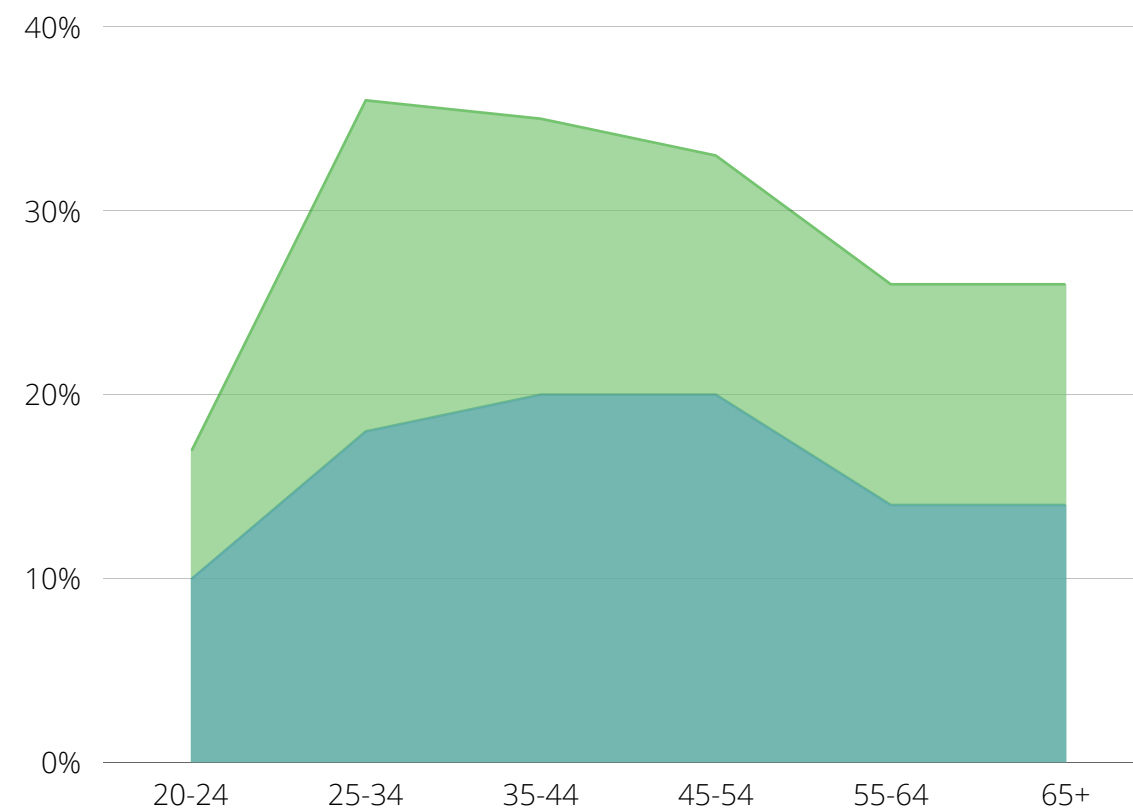
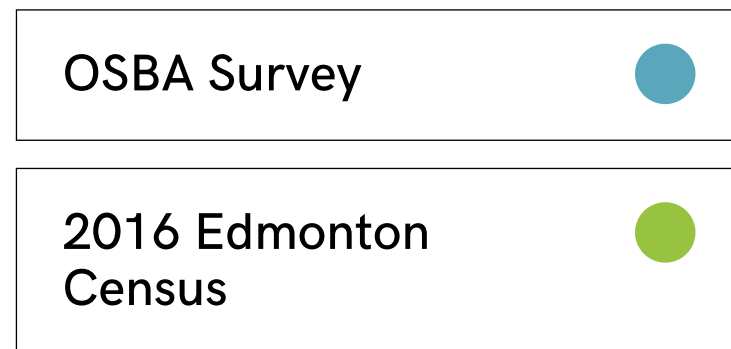
DEMOGRAPHIC BREAKDOWN

Age: OSBA Survey vs 2016 Edmonton Census

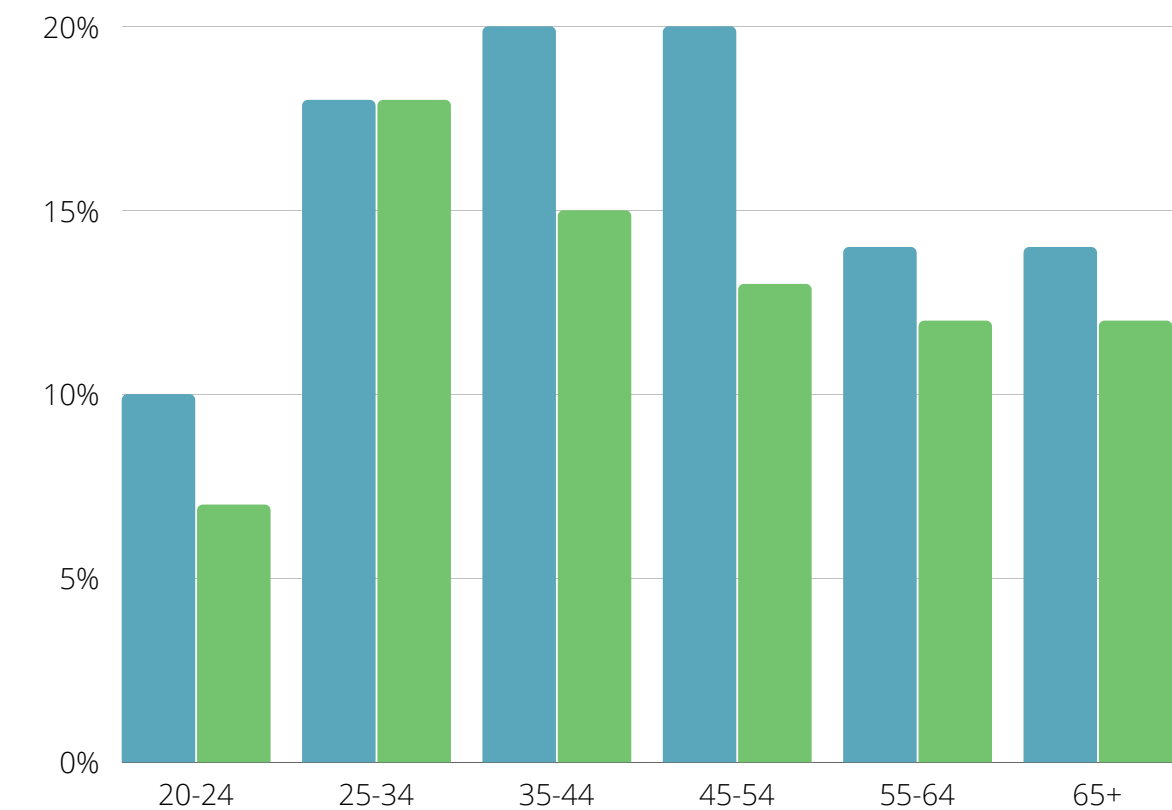


Summary

The relative age ranges of both the survey respondents and the general Edmonton population follow a similar curve (see Appendix A). While some variations in raw percentages exist, particularly between the ages of 35-54 (see Appendix B), the age breakdown of the survey sample follows closely with that of the general Edmonton population. This is significant as the results of the survey can now be better expanded to the greater Edmonton population.



Appendix A



Appendix B

Age: OSBA Survey vs 2016 Edmonton Census



Data

Comparison of age ranges between survey sample and Edmonton population.

Age		
Age Range	OSBA Public Survey	Edmonton Population
20-24	10.0%	7.4%
25-34	18.0%	18.3%
35-44	20.0%	14.5%
45-54	20.0%	12.9%
55-64	14.0%	11.7%
65+	14.0%	12.1%
Other/refused	4.0%	23.1%
Total	100%	100%

n=800

n=932,545

Gender: OSBA Survey vs 2016 Edmonton Census

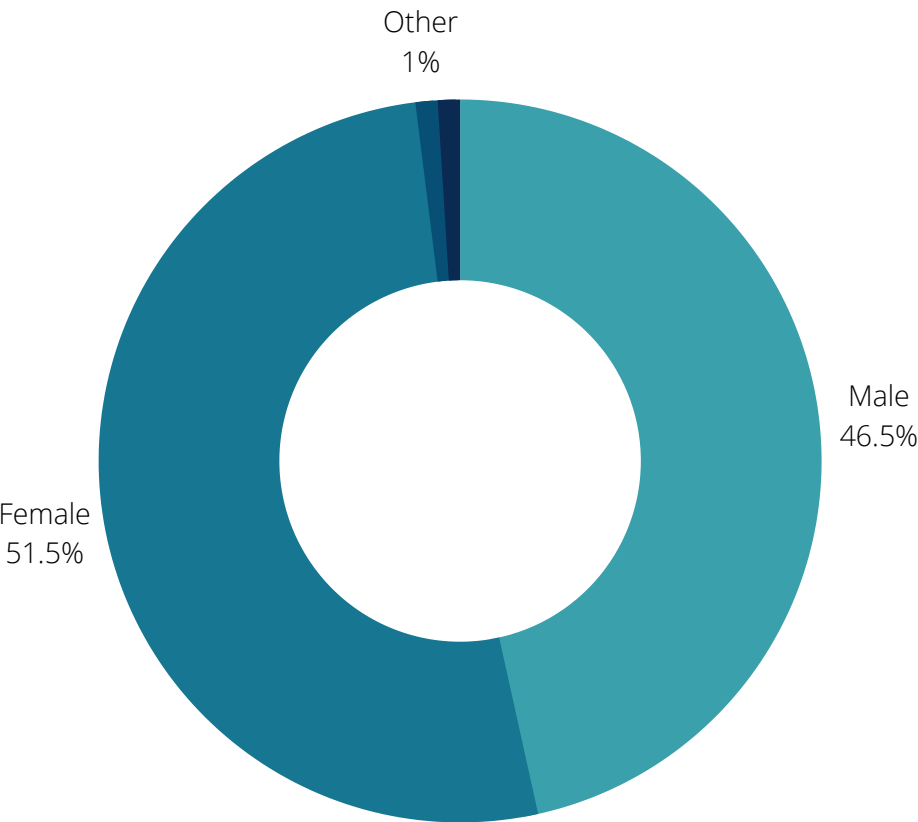


Summary

Once again, respondents of the public survey followed closely to those in the 2016 Edmonton Census. Variation between the public survey [Appendix C], and the 2016 census [Appendix D] is minimal. The 2016 census did not give the option to select outside of the category of "Male" and "Female", which could explain some of the variation that still exists. This is significant as the results of the survey can now be better expanded to the greater Edmonton population.

OSBA Survey

2016 Edmonton Census

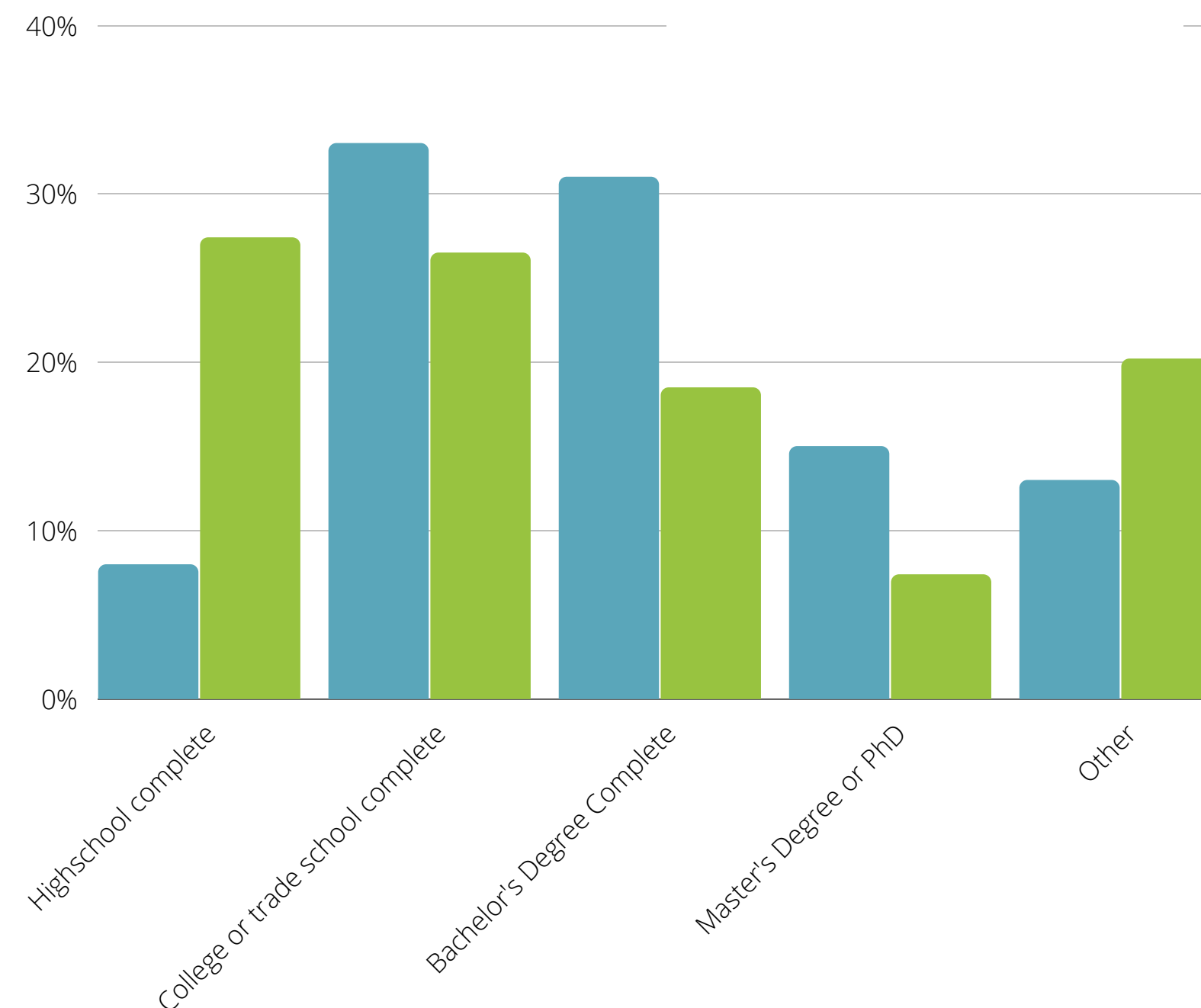
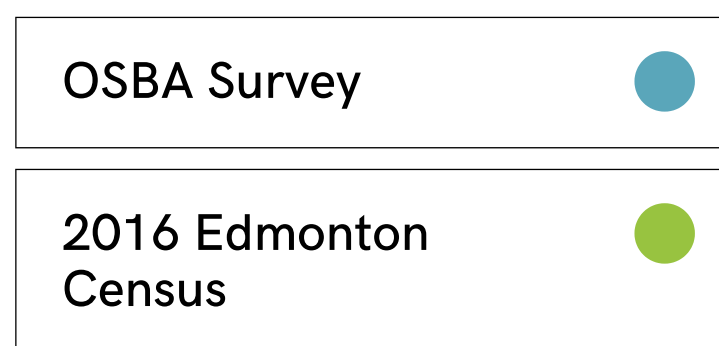


Level of Education Reached: OSBA Survey vs 2016 Edmonton Census



Summary

At the time of this report, the most recent census data regarding the highest level of education achieved includes those "aged 15 years and over in private households." In contrast, our respondents were above the age of 18 and asked to assess their own individual level of achievement. Considering this, we can still conclude that those who answered our questionnaire were highly educated - with the vast majority completing a level of studies higher than a high school diploma.





Level of Education Reached: OSBA Survey vs 2016 Edmonton Census

Data

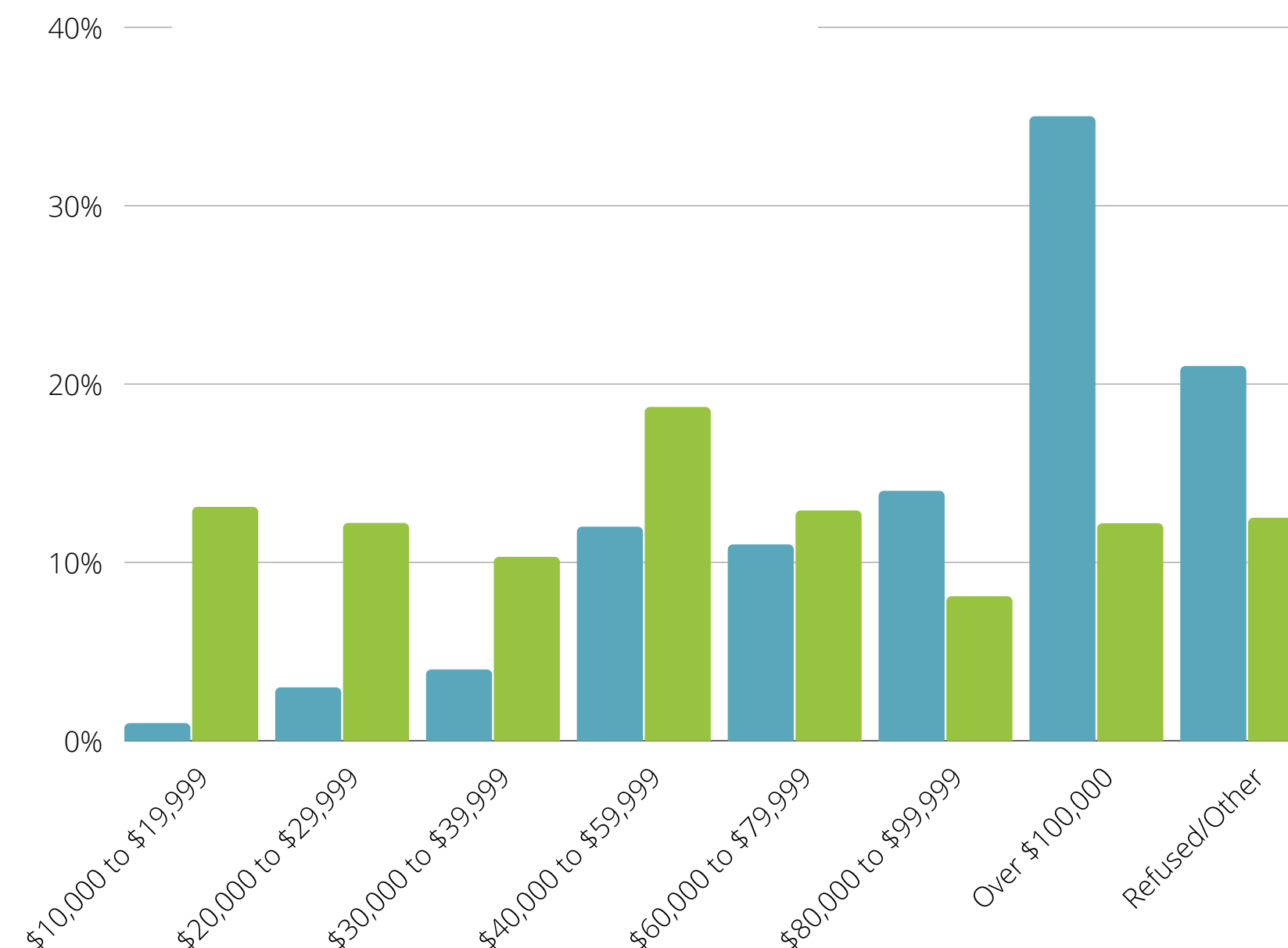
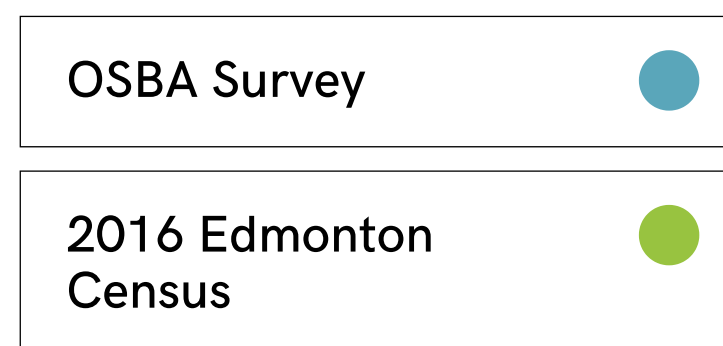
Comparison of education completed between survey sample and Edmonton population.

Education		
Level of Education Completed	OSBA Public Survey	Edmonton Population
Highschool Diploma	8%	27%
College or trade school	33%	26.50%
Some university	10%	n/A
University Bachelor's Degree	31%	18.50%
Post graduate/professional school (Master's Degree or PhD)	15%	7.40%
Other/refused	3%	20.20%
Total	100%	100%
	n=800	n=749,395

Total Household Income: OSBA Survey vs 2016 Edmonton Census

Summary

On average, survey respondents reported a significantly higher household income compared to the greater Edmonton population. Respondents in the survey sample had 2.86x more people reporting an income of \$100k or more than the general Edmonton population. They are also almost 7.56x less likely to have an income below \$30k. Overall, survey respondents have a relatively large amount of buying power as a result of their high income level.





Total Household Income: OSBA Survey vs 2016 Edmonton Census

Data

Comparison of household income between survey sample and Edmonton population.

Household Income		
Household Income Bracket	OSBA Public Survey	Edmonton Population
\$10,000 to \$19,999	1%	13.1%
\$20,000 to \$29,999	3%	12.2%
\$30,000 to \$39,999	4%	10.3%
\$40,000 to \$59,999	12%	18.7%
\$60,000 to \$79,999	11%	12.9%
\$80,000 to \$99,999	14%	8.1%
\$100,000 and above	35%	12.2%
Other/refused	20%	12.5%
Total	100%	100.0%

n=800

n=749,380

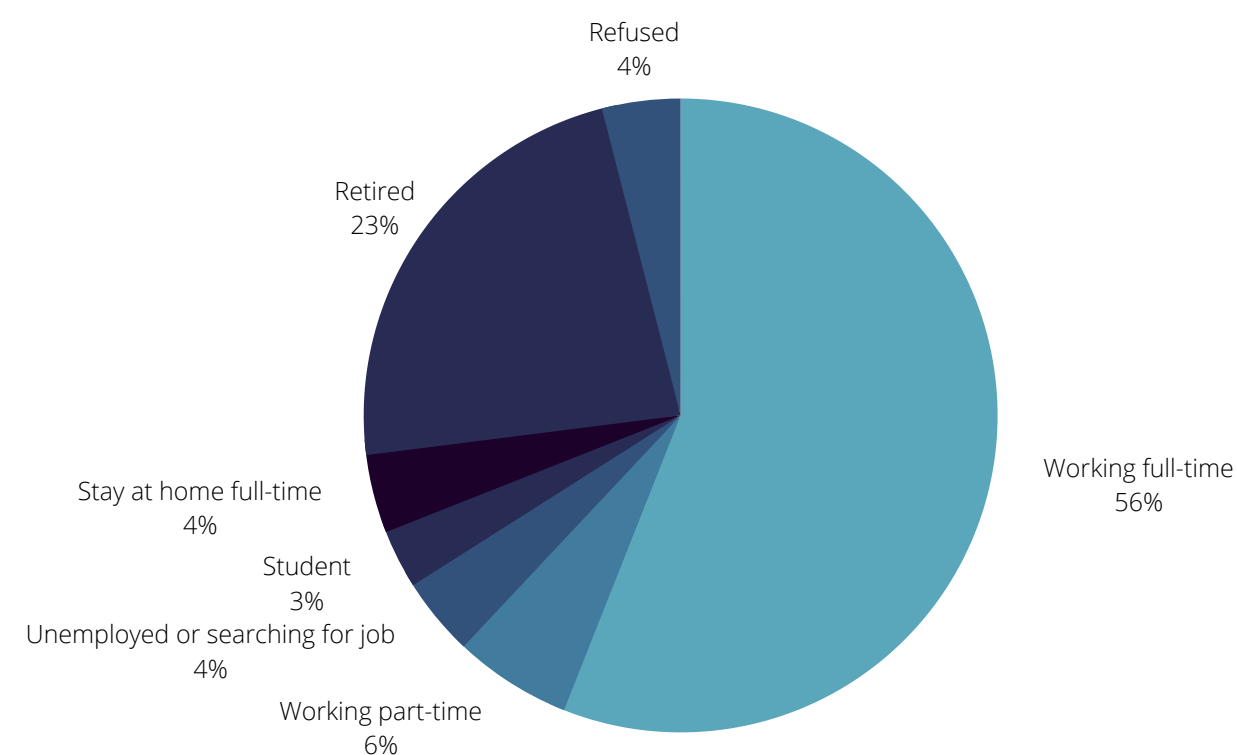
DEMOGRAPHIC BREAKDOWN

Employment Status, Education Completed, and Marital Status of Individual Respondents



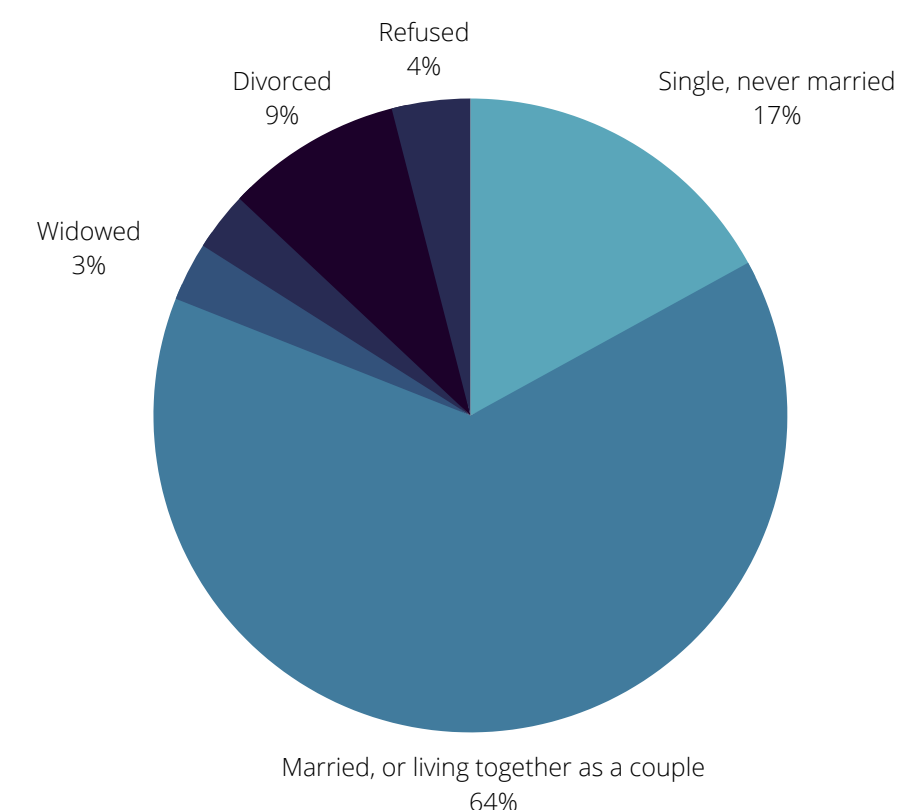
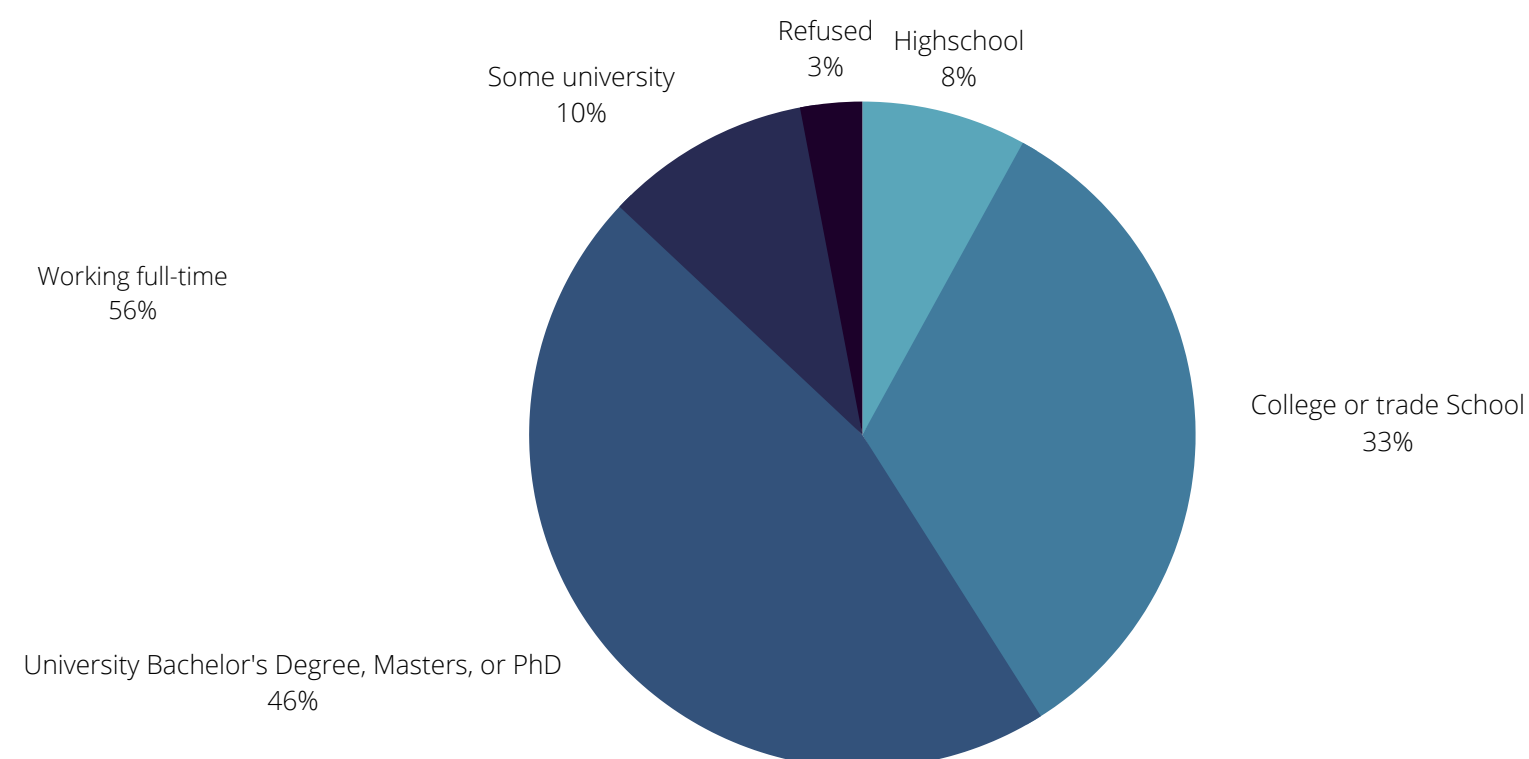
Summary

Overall, the majority of individual respondents were highly educated, working full-time, and either married or living together with a spouse. n=800



Current Employment Status

Highest Level of Personal Education Achieved



Current Marital Status

n=800

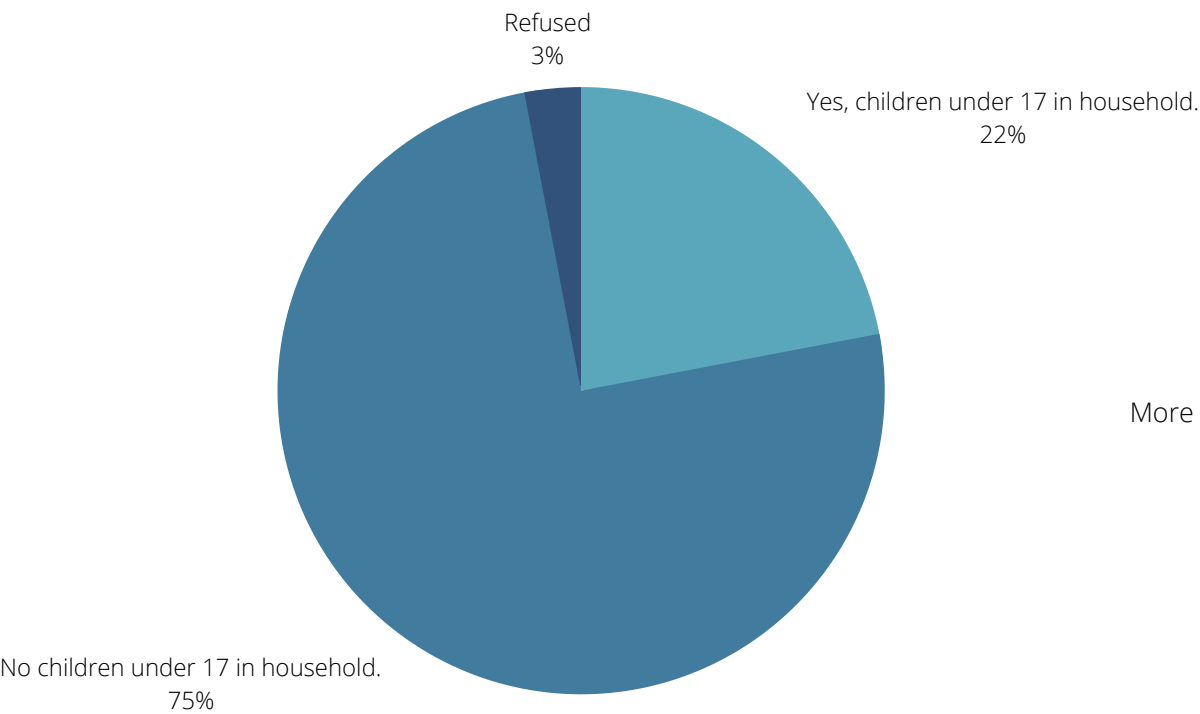
DEMOGRAPHIC BREAKDOWN

Household Statistics: Children, Income, and distance from Old Strathcona

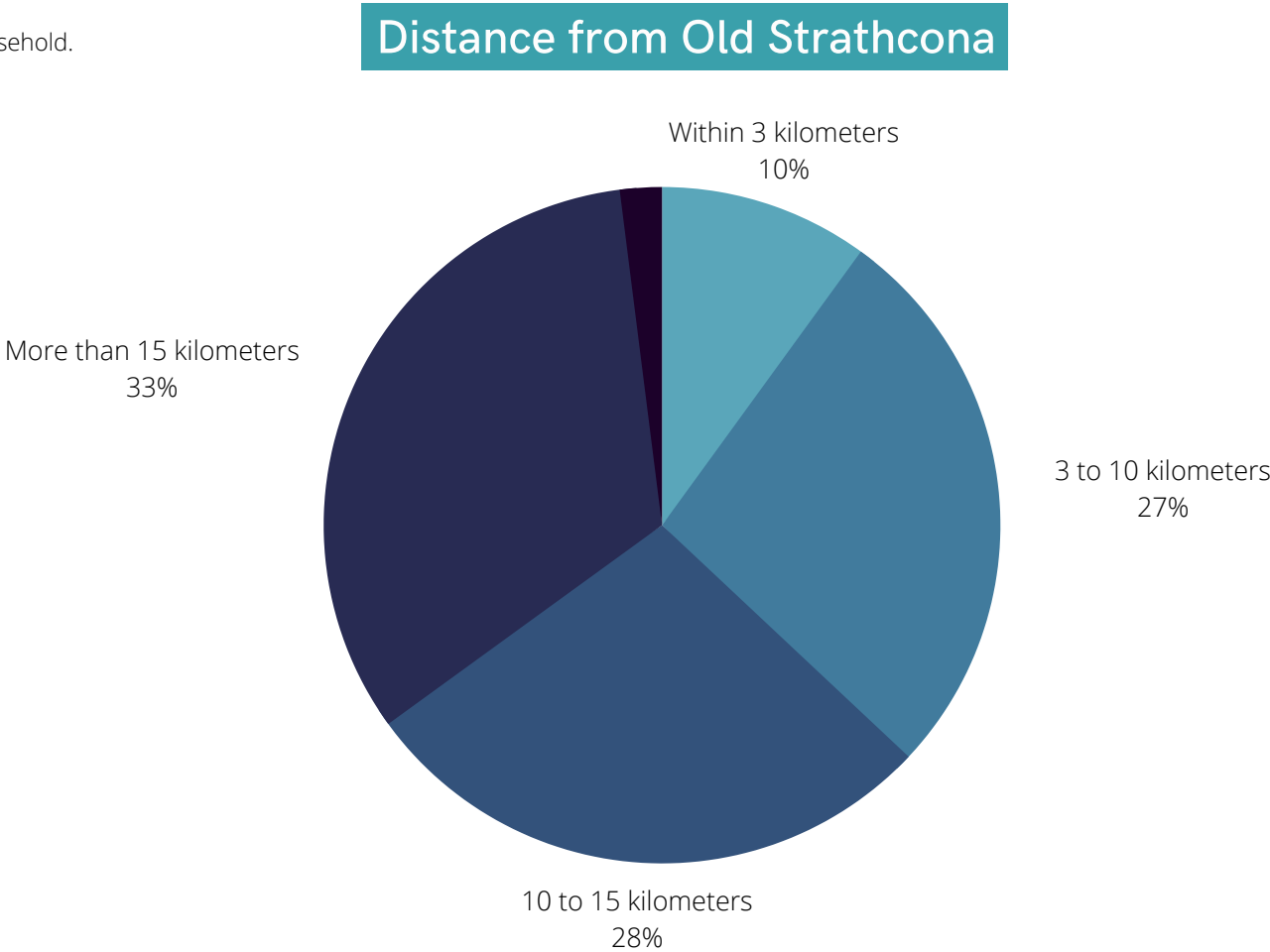


Summary

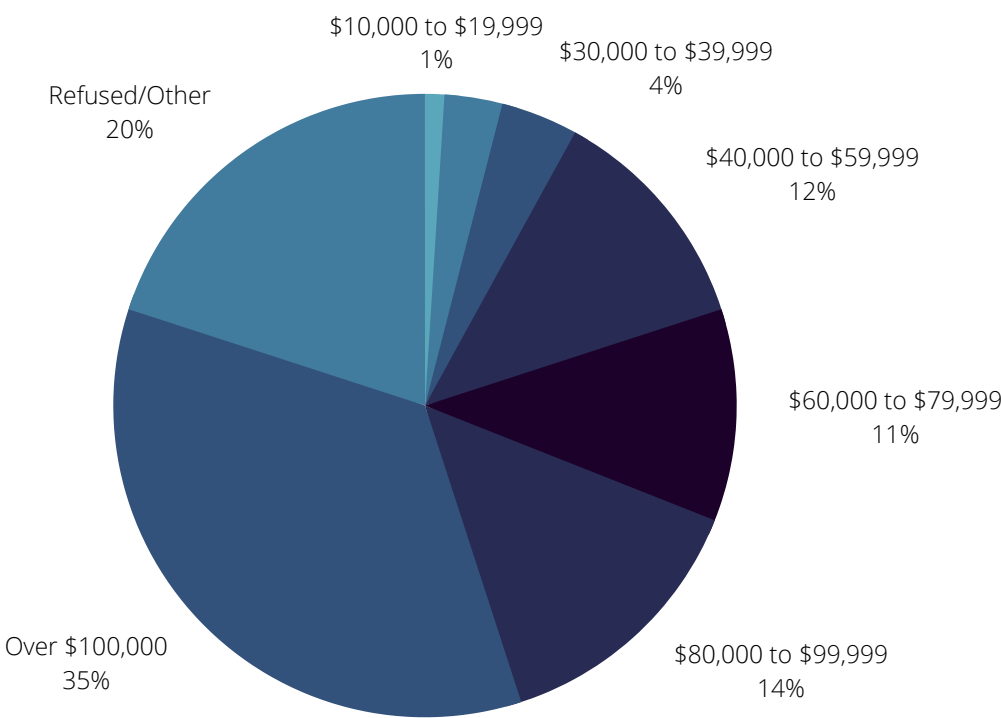
Overall, of the households reported, nearly half have a total income of over \$80,000 and three-quarters do not have children under the age of 17. Additionally, most respondents live outside of a typical walking distance of 3 kilometers. n=800



Children Under 17 in Household



Distance from Old Strathcona



Household Income

n=800

Citations

Government of Canada, S. C. (2019, August 9). Census Profile, 2016 Census Edmonton, City [Census subdivision], Alberta and Division No. 11, Census division [Census division], Alberta. Census Profile, 2016 Census - Edmonton, City [Census subdivision], Alberta and Division No. 11, Census division [Census division], Alberta. <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=4811061&Geo2=CD&Code2=4811&SearchText=edmonton&SearchType=Begins&SearchPR=01&B1=All&TABID=1&type=1>.