

Downtown Kingston! B.I.A Market Analysis

December 31st, 2004

8020Info Inc. - Consultants

Ideas, Advice & Information in Action



<http://www.8020info.com>

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Introduction to the Downtown Market Study

The Downtown Kingston! Business Improvement Area (BIA) engaged 8020Info Inc. to advise on, design and co-ordinate a research study and develop a profile of the downtown market – visitors and customers who visit downtown for a variety of purposes.

Some of the goals for this research were to update benchmarks, monitor the evolving character of the downtown, and track perceptions and forces having an impact on a variety of sectors – not only for retail merchandising but also for the service, hospitality, professional and institutional sectors which are a vital part of Downtown Kingston.

The market profile provides some statistics on standard demographic characteristics of downtown visitors (sex, age, place of residence and household income), downtown visitor/shopper data (on length, frequency, method of transportation and purposes of visits), profiles of information channels visitors use to find out what's going on downtown, and snapshots of attitudes on selected strategic questions (such as main reasons for visiting downtown, loyalty, activities with visiting family and friends, mental images of downtown, as well as positive points and priorities for improvement).

While many, many questions were of interest, the survey design focused on the needs of Downtown Kingston! BIA members, potential members and partners, and what information was needed to make decisions. The goal was to avoid spending money on researching what is already known (i.e. that consumers want variety, value, customer service and so on), or on hypothetical options that the organization would never pursue.

This study helps to better understand downtown Kingston's brand. It captures a snapshot of how people feel about the complex mental image called Downtown Kingston. It presents a picture of the value proposition that downtown has to offer, and how it stands up against other destinations for goods, services and experiences. It probes loyalty to downtown. And compared to studies in previous years, this research work gives more emphasis to how the downtown functions as an entertainment centre/people place, and the role played by professional services and other non-retail merchandising organizations.

In developing the research approach, several options were considered -- whether to use street intercepts or phone polling, questionnaires or online input, focus groups or one-on-one interviews – and in the end, it was determined that the best technique would be a telephone survey of a random sample of 300 adult respondents residing in the City of Kingston and nearby surrounding communities extending, approximately, to an area that includes Bath/Odessa, Sydenham and Gananoque.

The questionnaire used for this study is to be found in the appendix. The actual field work was conducted by Opinion Search in Ottawa from Nov.30 through Dec. 5th, 2004, with data analysis and development of the following report undertaken by 8020Info Inc.

Executive Summary

The Downtown Kingston Market Survey is based on a telephone survey of 303 adult residents of the city of Kingston and nearby communities extending approximately to an area that includes Bath/Odessa, Sydenham and Gananoque. These respondents provide a representative sampling in terms of age, gender, household income and employment demographics. In terms of residency, 86% indicated they lived outside the main downtown area, with more than two-thirds residing within the core K7K, K7L and K7M postal codes.

Primary Purposes for Downtown Visits

Study results indicate there are many reasons people visit downtown Kingston, and the primary purposes include:

- shopping,
- dining/entertainment,
- enjoying the waterfront, and
- visiting a non-retail office (such as a business, professional or government office, bank or healthcare service).

Frequency of Visitation, Average Length of Stay and Transportation Habits

More than half of the respondents indicated that they visit the downtown area at least once per week for activities such as shopping, dining/entertainment, enjoying the waterfront, and visiting a non-retail office. Almost a quarter of all respondents said that they visit three or more times per week for various activities.

The length of time a person will spend downtown will vary, obviously, from time to time and according to the purpose of the visit. More than half of the survey respondents said they spend from one to two hours downtown on average when they visit. Another third spend more than two hours on average. Over all, more than 90% of the respondents said they spend an hour or more on a typical visit downtown.

Kingston is known as a walking city, and almost 23% reported that they usually walked when they visit downtown Kingston. As expected, the vast majority (82%) drive and 13% ride with someone else.

80% Recommend Downtown as a Dining, Commercial and Shopping District

A satisfied customer is not always the same as a loyal customer – a visitor or customer who is a champion for the downtown and recommends it to family and friends as a dining, commercial and shopping destination. An overwhelming majority -- 79% -- said they would recommend downtown Kingston as a dining, commercial and shopping destination. Another 10% said they would recommend downtown for particular aspects (dining, commercial or shopping) or in certain circumstances. Only 10% said they would not recommend downtown Kingston.

Of that small percentage who did not say they would recommend downtown Kingston, almost two-thirds said they would recommend the Cataraqui Town Centre, just over half would recommend the Rio-Can Centre, and less than a third would recommend either the Frontenac Centre/Wal-Mart or the Kingston Centre.

Downtown Kingston as a Main Destination

Downtown Kingston is the main destination for several types of activities and services: 75% of respondents said downtown is the main place to go for restaurants and nightclub shows. A total of 61% of respondents indicated downtown Kingston as the main place they would go for professional services. After specialty retail shopping at 45%, it is interesting to note that 39% of respondents viewed downtown Kingston as the main place to go for personal services, such as those provided by travel agents, fitness centres, tailors, shoe repair shops, or barber/beauty salons.

Main Reasons Driving Visits to Downtown

The activities and services described above are also reflected in respondents' views of the main reason that drives their visits to downtown Kingston, with 24% of respondents naming dining and entertainment as the main reason they visit downtown, and 18% indicating various types of shopping as their main reason for visiting.

Descriptions of Downtown Kingston

Respondents were asked to rate the accuracy of phrases often used to describe Downtown Kingston. The top three phrases that rang true for survey respondents were:

- “The city's heritage and cultural district” (91% said it was accurate)
- “The area's premiere dining and entertainment district” (86%)
- “The heart of the city” (84 %)

The lowest accuracy rating was given to the phrase “a full-service shopping district,” rated as an accurate description by 51% of respondents. This contrasts with the 82% of respondents who said that downtown Kingston could be accurately described as “a boutique shopping area.”

Respondents were also asked to identify mental images associated with downtown Kingston. The image mentioned most often was the waterfront (mentioned by 45% of respondents) followed by City Hall (20%).

Bringing Visiting Family and Friends Downtown

A significant component of the Kingston tourism industry involves visitors who are friends or family of local residents. Respondents were asked whether they bring visiting family and friends downtown, and 85% said they do. Respondents said the top downtown activities that they bring their friends and relatives to were:

- Visiting a gallery, theatre, museum or cultural attraction (62%)
- Entertainment (56%)
- Special events, (54%) and
- Shopping (48%).

Positive Points and Priority Areas for Improvement

Respondents were invited to suggest what they would most like to see improved about downtown Kingston. As might be expected from past studies, the top priority for improvement was parking, named by more than 40% of respondents in the sample.

When invited to suggest what they consider to be the “greatest positive point” about downtown Kingston, respondents indicated a wide range of positive points. The two most frequent mentions were:

- the waterfront (17%) and
- heritage/history and architecture/historical buildings (11% and 5% respectively, for a group total of 16%).

Sources of Information About Downtown Kingston

In terms of what sources of information respondents use to learn about what’s going on downtown, more than three-quarters rely on newspapers or word-of-mouth communications. Almost 60% rely on radio or posters/flyers/signs for sources of information.

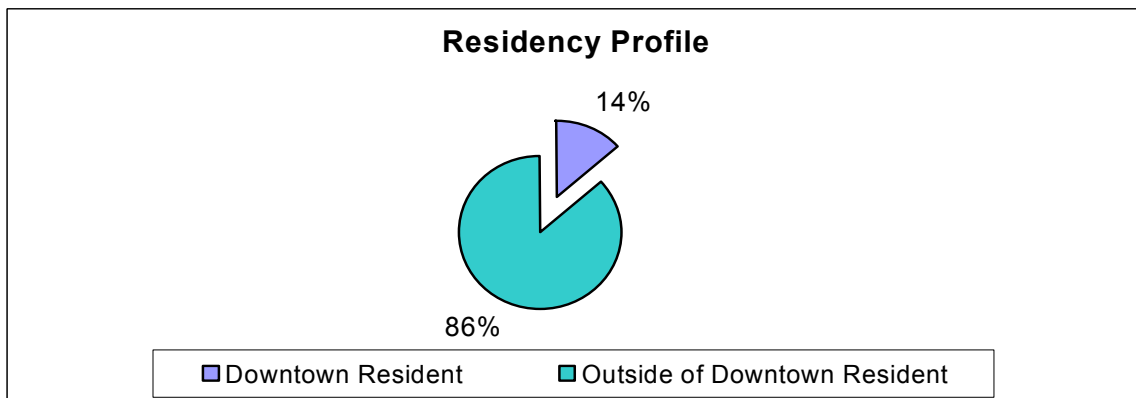
Profile of Respondents

The Downtown Kingston Market Survey included a number of questions to help build a profile of the survey respondents. These results not only paint a picture of the sample, but also enable certain tests to ensure the sample is representative of the population under study – adult residents of the city of Kingston and nearby communities extending approximately to an area that includes Bath/Odessa, Sydenham and Gananoque.

Residency Profile

Survey respondents were asked to identify themselves as living in the main downtown commercial area or not: 14% said they lived in the main downtown area; 86% said they lived outside the main downtown area.

Q1a: Do you live in the main downtown area or outside downtown?



Residency Profile:		
	<u># Frequency</u>	<u>% Percentage</u>
Downtown Resident	41	14%
Non-Downtown Resident	261	86%
Total	302	100%
Don't Know/Can't Say	1	

Postal Code Profile of Respondents

They were also asked to provide interviewers with the first three digits of their postal codes. The detailed results are provided below and, as expected, indicate a concentration (69%) in the K7K, K7L and K7M postal codes, which are the main urban postal codes covering from Collins Bay Road, Taylor-Kidd Boulevard and Sydenham Road on the west to Barriefield Village on the east and bordered by Highway 401 and Lake Ontario.

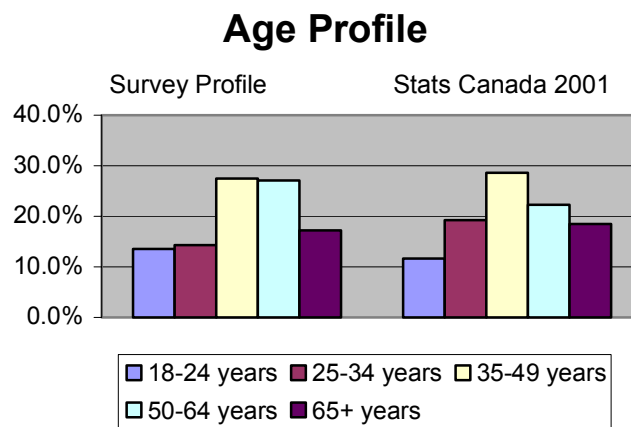
Q16: Respondents were asked to confirm the first three digits of their postal code.

Postal Code Profile of Respondents:		
	# Frequency	% Percentage
K0H	51	17.4%
K0K	1	0.3%
K7G	2	0.7%
K7K	62	21.2%
K7L	48	16.4%
K7M	97	33.1%
K7N	17	5.8%
K7P	15	5.1%
Total	293	100%
Don't Know/Can't Say	5	
No Answer	5	

Age Profile of Respondents

Although this survey did not impose age quotas (requiring a certain number of respondents from particular age groups), the random sample does provide a relatively good match to the three-year-old 2001 Census/Statistics Canada age profile. The 25-34 age group may be slightly underrepresented, and the 50-64 age group may be slightly over-represented, but there appears to be minimal systemic age bias in the results.

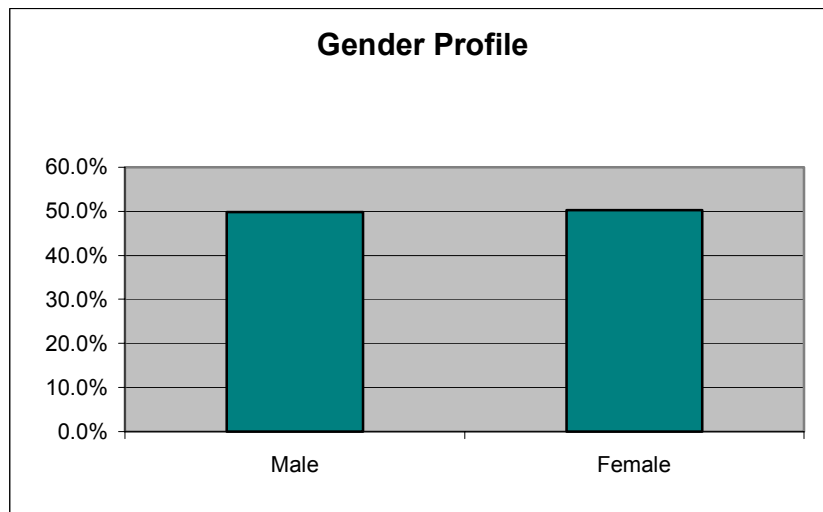
Q14: Respondents were asked to confirm the range of their age.



Age Profile of Respondents			
	# Frequency	% Percentage	2001Stats Canada % Percentage
18-24 years	41	13.5%	11.6%
25-34 years	43	14.2%	19.2%
35-49 years	83	27.4%	28.6%
50-64 years	82	27.1%	22.2%
65+ years	52	17.2%	18.4%
Don't Know/Can't Say	1	0.3%	-----
No Answer	1	0.3%	-----
Total	303	100%	100%

Gender Profile of Respondents

As one would expect in a random sample, results were obtained from an equal number of male and female respondents.

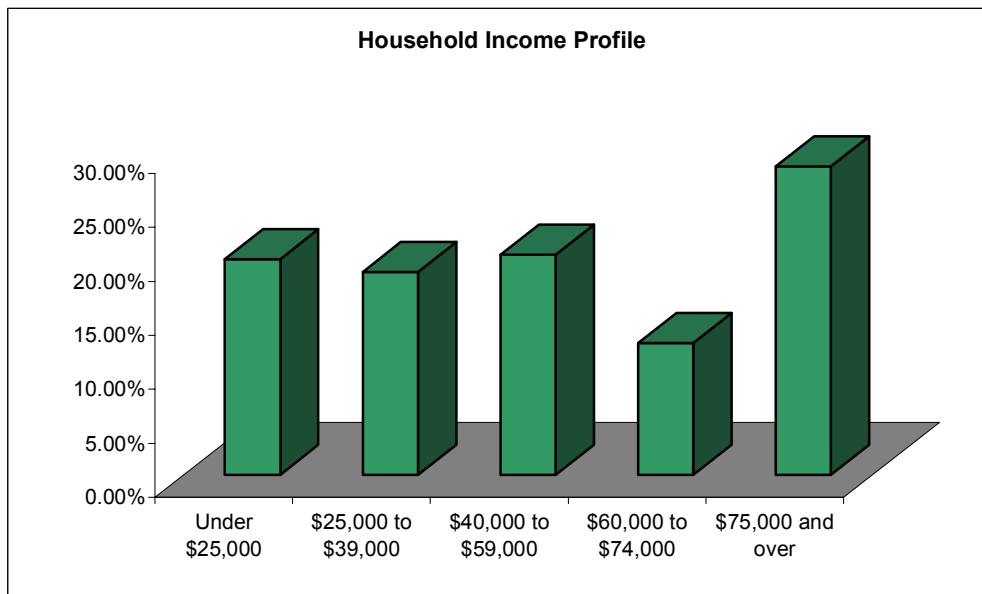


Gender of Respondents		
	# Frequency	% Percentage
Male	151	49.8%
Female	152	50.2%
Total	303	100%

Household Income Profile

Respondents were invited to identify their approximate household income in one of five categories ranging from “Under \$25,000” to “\$75,000 and Over.” While these results are approximate, they do offer some indication of the income profile of respondents in the survey sample.

Q15: Respondents were asked to confirm their approximate household income level.



Household Income Profile:

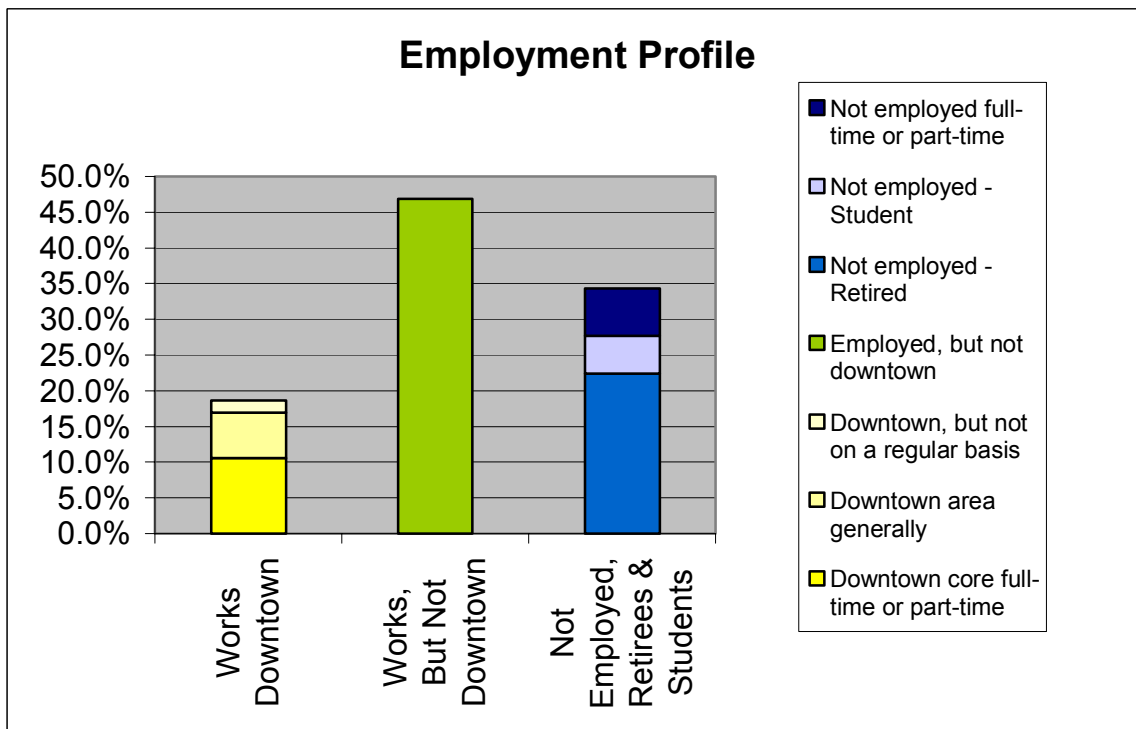
	# Frequency	% Percentage
Under \$25,000	51	20.0%
\$25,000 to \$39,000	48	18.8%
\$40,000 to \$59,000	52	20.4%
\$60,000 to \$74,000	31	12.2%
\$75,000 and over	73	28.6%
Total	255	100%
Don't know/can't say	33	
No Answer	15	

Employment Profile

The main downtown business district is an active employer in the Kingston area, both for full-time and part-time employment. The area also has significant numbers of students and retired citizens. Detailed results are included in the table on the following page. The chart indicates the relative number of respondents who:

- Work downtown in the main business/shopping district or within walking distance of City Hall, on a full-time, part-time or casual basis
- Are employed, but not downtown
- Are not employed full-time or part-time, or are students or retired citizens

Q1b: Do you work on a regular basis in the main downtown business district or elsewhere in the Kingston area?



Employment Profile		
	<u># Frequency</u>	<u>% Percentage</u>
Works downtown in the main business/shopping district full-time or part-time	32	10.6%
Works downtown generally, within walking distance of City Hall	19	6.3%
Works downtown, but not on a regular basis	5	1.7%
Employed, but not downtown	142	46.9%
Not employed full-time or part-time	20	6.6%
Not employed - Student	16	5.3%
Not employed - Retired	68	22.4%
Total	<u>302</u>	<u>100%</u>
No Answer	1	

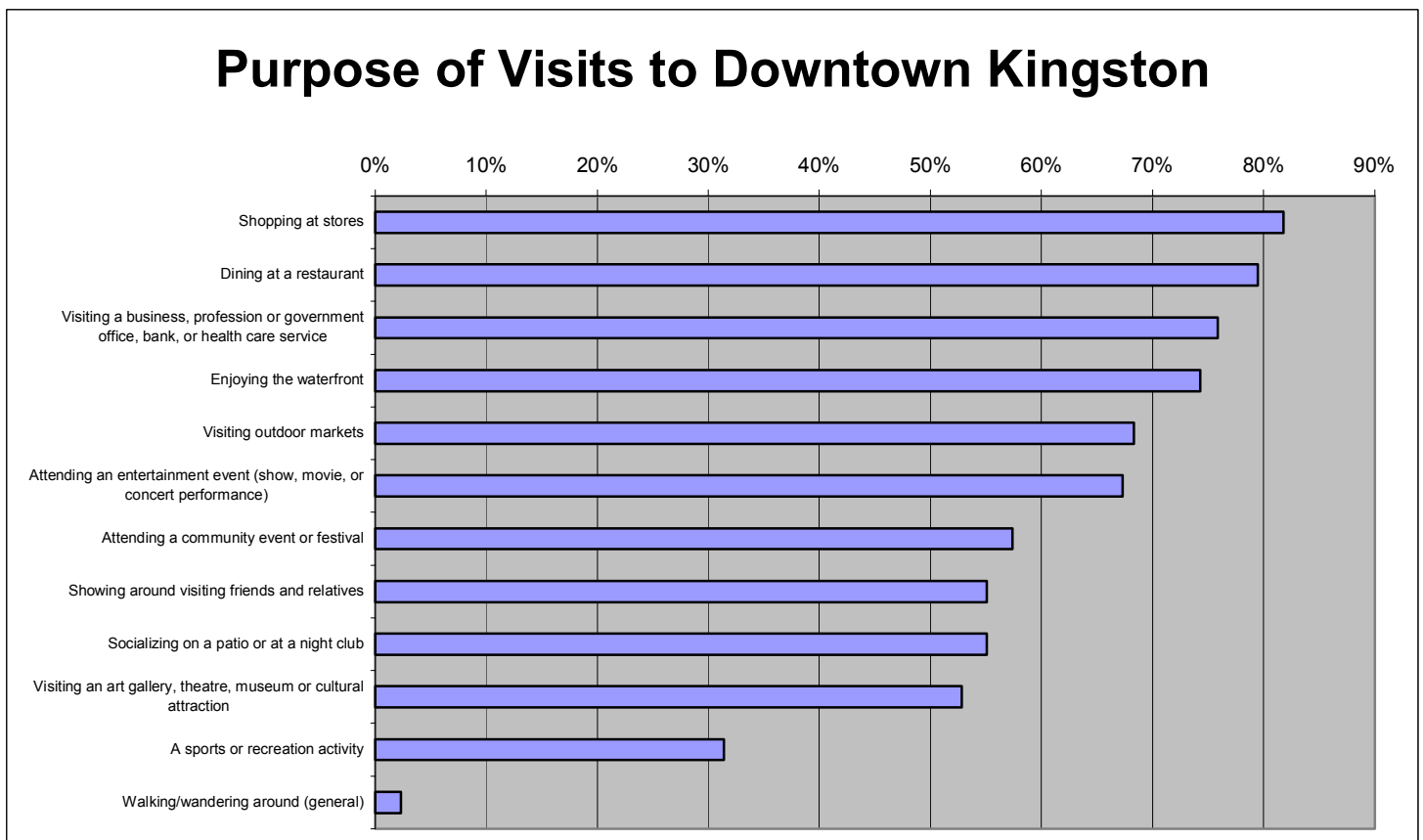
Purpose of Visits to Downtown Kingston

One of the first questions in the survey asked respondents about various purposes for which they might have visited downtown over the past year. This approach allowed each respondent to reflect on a more complete range of the various types of visits they may have made, and yields results that indicate the relative importance of various downtown activities.

It is interesting to note here (and as similar results show elsewhere in this study) the primary reasons for visiting downtown Kingston include:

- shopping,
- dining/entertainment,
- enjoying the waterfront, and
- visiting a non-retail office (such as a business, professional or government office, bank or healthcare service).

Q2: Have you visited Downtown Kingston in the past year for any purpose, such as:



Have you visited Downtown Kingston in the past year for any purpose, such as:

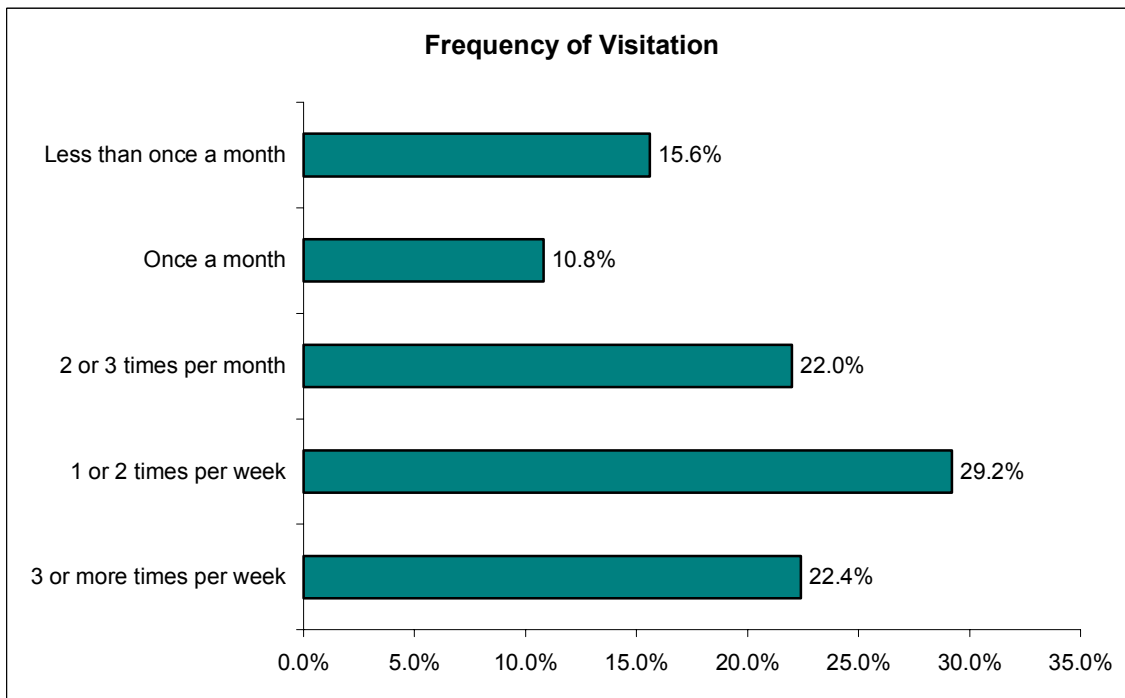
	# Frequency	% Percentage
Shopping at stores	248	81.8%
Dining at a restaurant	241	79.5%
Visiting a business, profession or government office, bank, or health care service	230	75.9%
Enjoying the waterfront	225	74.3%
Visiting outdoor markets	207	68.3%
Attending an entertainment event (show, movie, or concert performance)	204	67.3%
Attending a community event or festival	174	57.4%
Showing around visiting friends and relatives	167	55.1%
Socializing on a patio or at a night club	167	55.1%
Visiting an art gallery, theatre, museum or cultural attraction	160	52.8%
A sports or recreation activity	95	31.4%
Walking/wandering around (general)	7	2.3%

Percentages based on the full sample of 303 respondents

Frequency of Visits to Downtown Kingston

Respondents were asked how often they visited downtown Kingston for shopping, dining/entertainment, enjoying the waterfront, visiting a non-retail office or for other purposes. More than half of them visit at least once per week, and almost a quarter visit three or more times per week. A quarter of them visit once a month or less. Detailed results are presented below.

Q3: Respondents were asked to confirm how often they visit downtown Kingston:



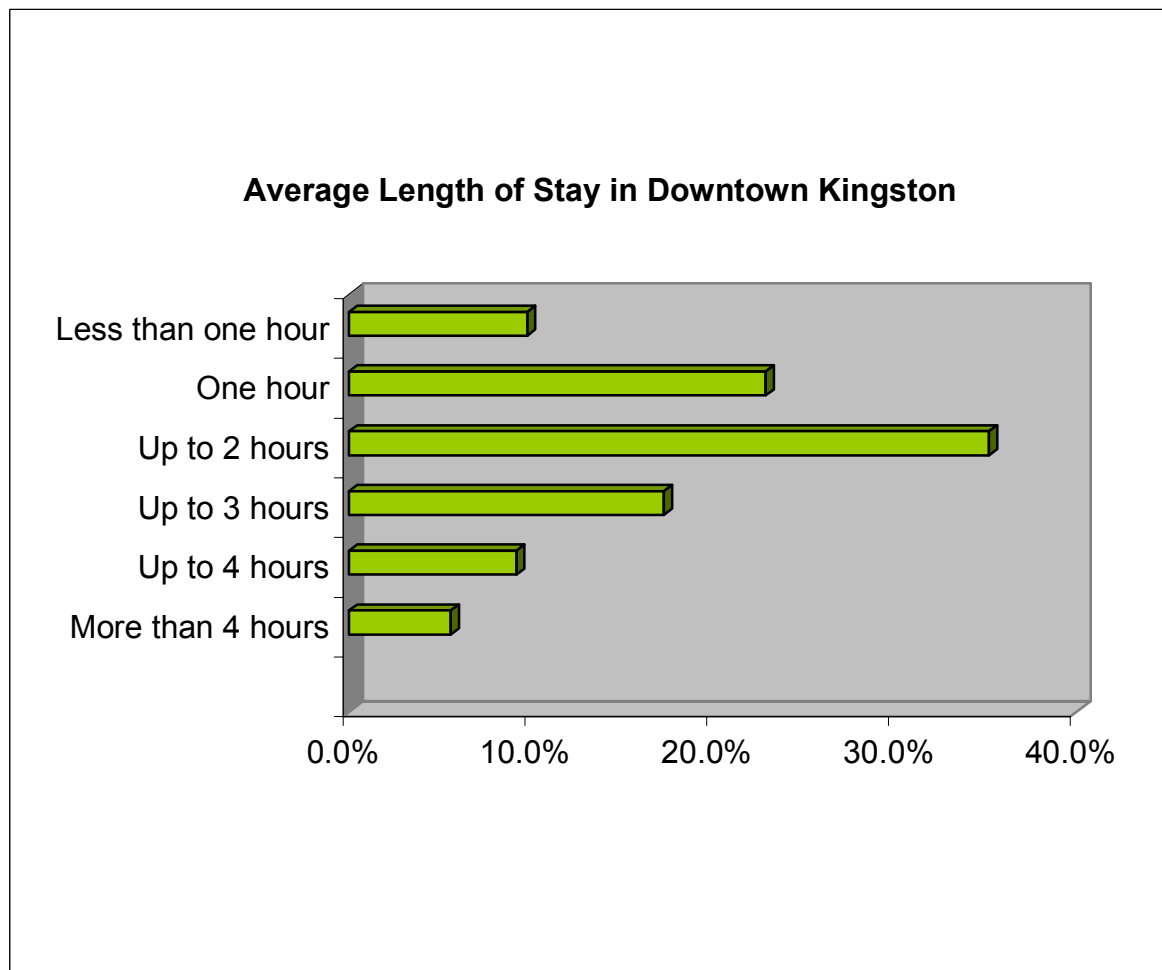
Profile of Visitation Frequency:		
	# Frequency	% Percentage
Less than once a month	46	15.6%
Once a month	32	10.8%
2 or 3 times per month	65	22.0%
1 or 2 times per week	86	29.2%
3 or more times per week	66	22.4%
Total	295	100.0%
No Answer	8	

Typical Length of Visits to Downtown Kingston

The length of time a person will spend downtown will vary, obviously, from time to time and according to the purpose of the visit. Respondents were asked to estimate how much time on average they tend to spend downtown from the time they arrive until the time they leave downtown. Results were recorded from as short a time period as 15 minutes ranging up to eight hours or more.

As results below indicate, more than half of the survey respondents said they spend from one to two hours downtown on average when they visit. Another third spend more than two hours on average. Over all, more than 90% of the respondents said they spend an hour or more on a typical visit downtown.

Q4: Respondents were asked to confirm how much time on average they spend downtown on a typical visit, from the time they arrive until the time they leave:



Typical Length of Visits to Downtown Kingston

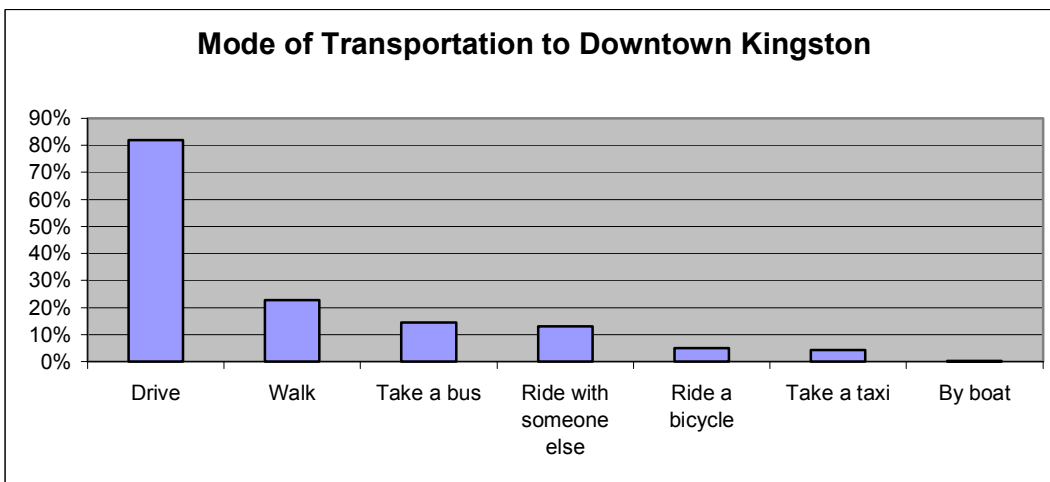
	# Frequency	% Percentage
Less than one hour	28	9.8%
One hour	65	22.9%
Up to 2 hours	100	35.2%
Up to 3 hours	49	17.3%
Up to 4 hours	26	9.2%
More than 4 hours	16	5.6%
Total	284	100%
Don't know/Can't say	11	
No Answer	8	

Mode of Transportation to Downtown Kingston

Kingston is known as a walking city, and almost 23% reported that they usually walked when they visit downtown Kingston. As expected, the vast majority (81.8%) drive and 13% ride with someone else.

Note: Percentages do not add to 100% because respondents were invited to name more than one mode of transportation that they usually would use to visit downtown Kingston.

Q5: Respondents were asked to confirm how they usually travel to visit downtown Kingston:



How do you usually travel to visit downtown Kingston?		
	# Frequency	% Percentage
Drive	248	81.8%
Walk	69	22.8%
Take a bus	44	14.5%
Ride with someone else	40	13.2%
Ride a bicycle	15	5.0%
Take a taxi	13	4.3%
By boat	1	0.3%
n=303		

Recommending Downtown Kingston to Others

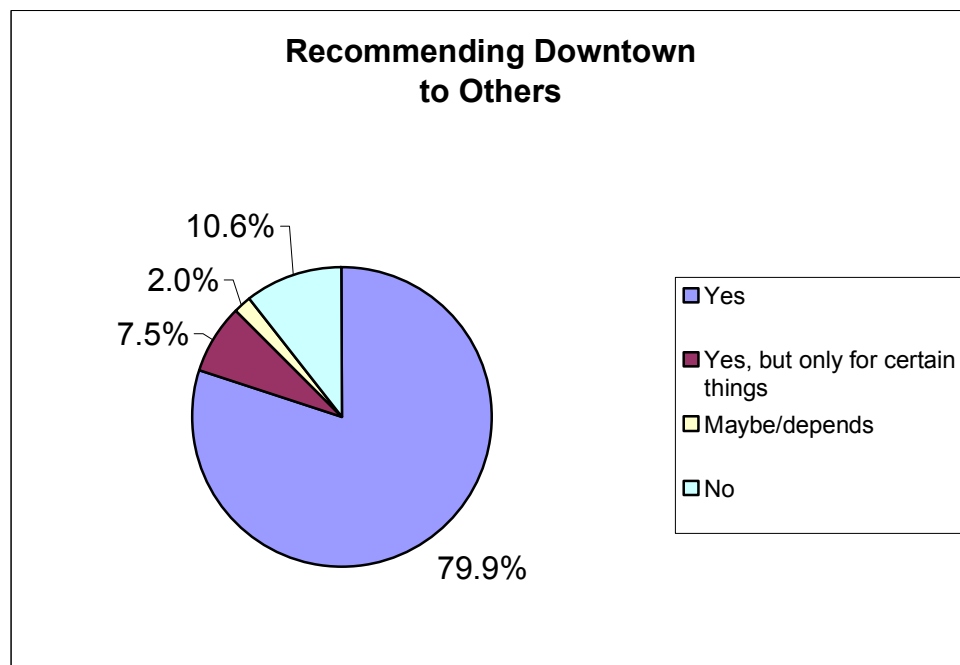
A satisfied customer is not always the same as a loyal customer – a visitor or customer who is a champion for the downtown and recommends it to family and friends as a dining, commercial and shopping destination. This question was put to respondents in the Downtown Kingston Market Survey.

As the results below indicate, an overwhelming majority -- 79.3% -- said they would recommend downtown Kingston as a dining, commercial and shopping destination. Another 10% said they would recommend downtown for particular aspects (dining, commercial or shopping) or in certain circumstances. Only 10% said they would not recommend downtown Kingston.

Of those who did not say they would recommend downtown Kingston, almost two-thirds said they would recommend the Cataraqui Town Centre, just over half would recommend the Rio-Can Centre, and less than a third would recommend either the Frontenac Centre/Wal-Mart or the Kingston Centre.

Loyalty and recommending downtown Kingston to others...

Q6: Respondents were asked if they would recommend downtown Kingston to their family and friends as a dining, commercial and shopping destination:



Would you recommend downtown Kingston to your family and friends as a dining, commercial and shopping destination?

	# Frequency	% Percentage
Yes	234	79.9%
Yes, but only for certain things	22	7.5%
Maybe/depends	6	2.0%
No	31	10.6%
	Total	293
		100%
Don't Know/Can't Say	2	
No Answer	8	

Q6a: If not downtown Kingston, what dining, commercial and shopping destinations do you recommend to your family and friends? *Note: Percentages do not add to 100% because respondents were invited to name more than one destination.*

If you do not recommend Downtown Kingston, what dining, commercial and shopping destinations do you recommend to your family and friends?

	# Frequency	% Percentage
Cataraqui Town Centre	19	61.3%
Rio-Can Centre	16	51.6%
Frontenac Centre/Walmart	12	38.7%
The Kingston Centre	7	22.6%
n=31		

Main Types of Stores and Businesses Visited

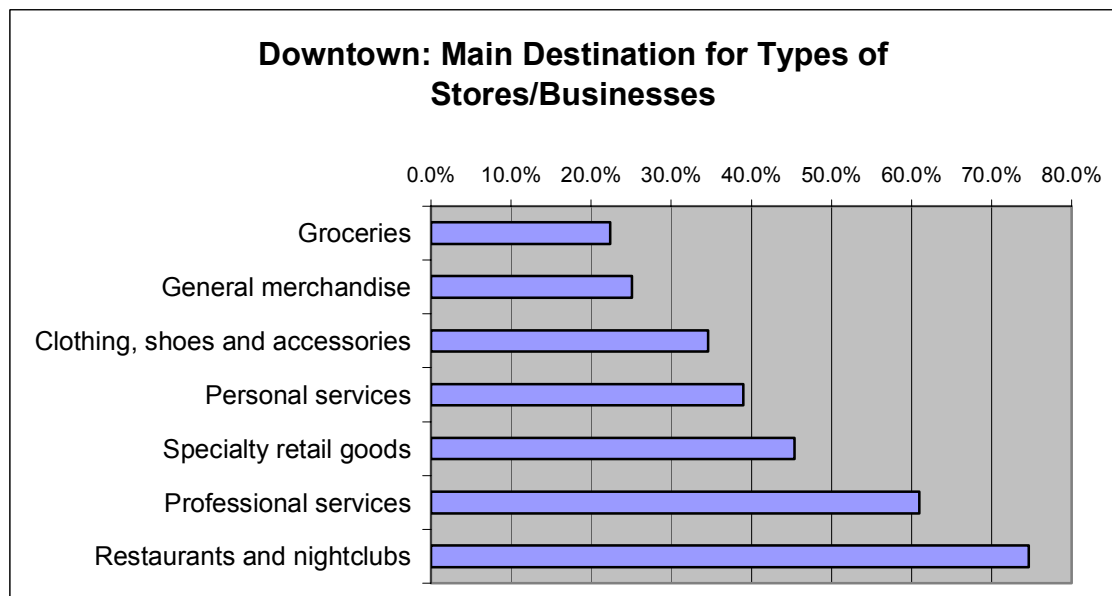
In this survey, interviewers reviewed a list of seven different types of stores and businesses that people might visit in the Kingston area. Respondents were asked to name the main place they would go -- either downtown or somewhere else -- to find that store or business.

Downtown Kingston's pre-eminence in the category of restaurants and nightclubs shows clearly in the results of below -- 75% of respondents said that downtown Kingston would be the main place they would go for those services.

Clearly, downtown Kingston is also perceived as a centre for professional services (such as those provided by accountants, financial consultants, lawyers, doctors, dentists and so on). A total of 61% of respondents named downtown Kingston as the main place they would go for professional services.

In addition to retail shopping, it is interesting to note that 39% of respondents viewed downtown Kingston as the main place to go for personal services, such as those provided by travel agents, fitness centres, tailors, shoe repair shops, or barber/beauty salons.

Q7: Respondents were asked to indicate the main type of place they would go -- either downtown or somewhere else -- for a variety of shopping, dining and entertainment purposes:



Where is the main place you would go for... (Percentages indicate those who selected Downtown Kingston)

	<u># Frequency</u>	<u>% Percentage</u>
Groceries	66	22.4%
General merchandise	74	25.1%
Clothing, shoes and accessories	102	34.6%
Personal services	115	39.0%
Specialty retail goods	134	45.4%
Professional services	180	61.0%
Restaurants and nightclubs	220	74.6%

Accuracy of Phrases Used to Describe Downtown

Interviewers asked respondents about a number of different phrases that some people may use to describe downtown Kingston. Please note that they were not asked whether the phrase was meaningful to them or the reason for them to visit downtown; they were asked only for their views on whether the phrase was an accurate description, or not, of downtown Kingston.

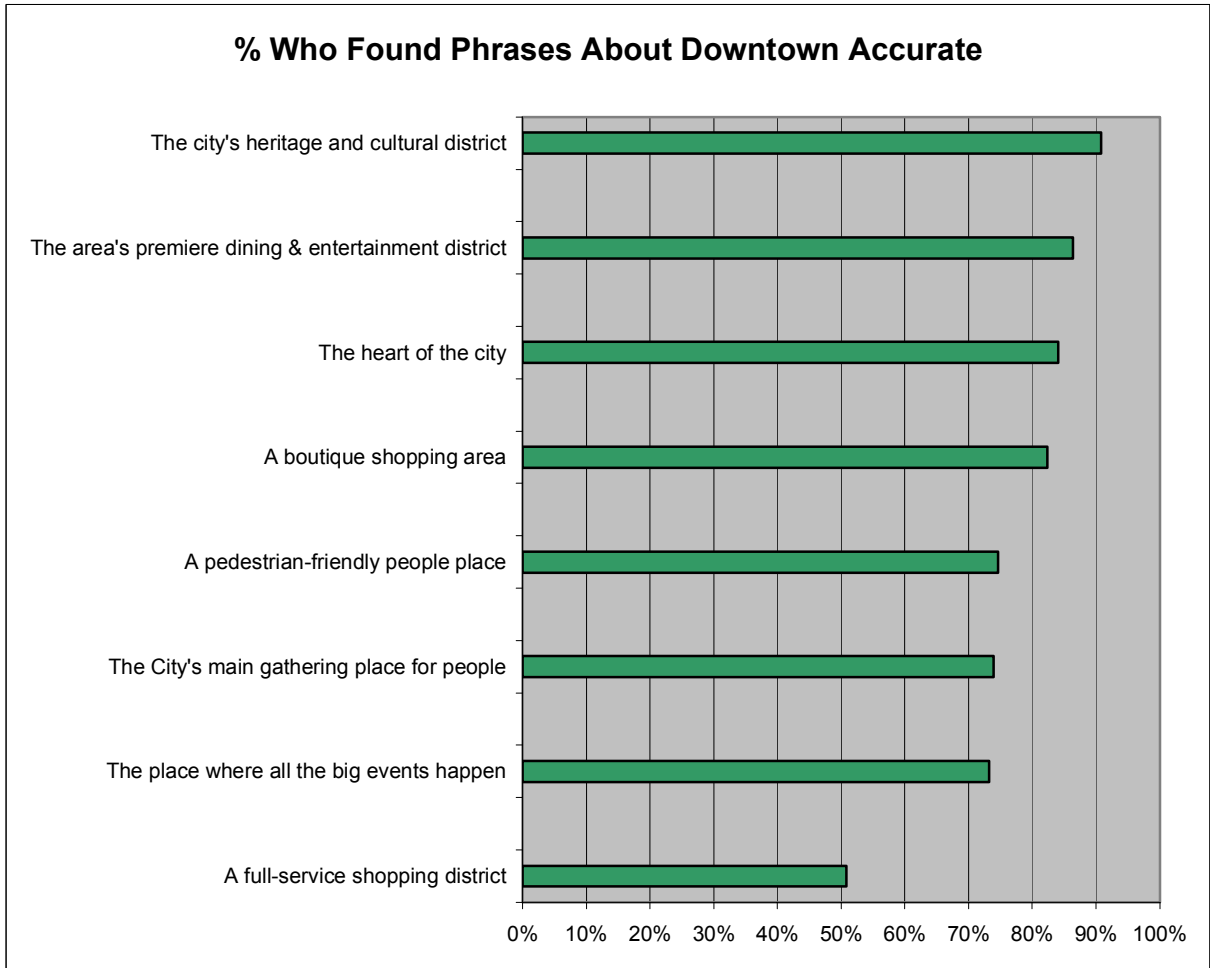
The top three phrases that rang true for survey respondents were:

- “The city's heritage and cultural district” (90.8% said it was accurate)
- “The area's premiere dining and entertainment district” (86.4%)
- “The heart of the city” (84.1%)

The lowest accuracy rating was given to the phrase “a full-service shopping district,” rated as an accurate description by 50.8% of respondents. This contrasts with the 82.4% of respondents who said that downtown Kingston could be accurately described as “a boutique shopping area.”

Q8: Respondents were read a number of phrases that might be used to describe downtown Kingston. They were asked to indicate whether they thought the phrase was an accurate description of downtown Kingston or not:

Accuracy of phrase to describe downtown Kingston:				
	Accurate %	Not Accurate %	Don't Know/ Can't Say %	Total %
A full-service shopping district	50.8%	47.8%	1.4%	100%
The place where all the big events happen	73.2%	20.7%	6.1%	100%
The City's main gathering place for people	73.9%	22.0%	4.1%	100%
A pedestrian-friendly people place	74.6%	21.4%	4.1%	100%
A boutique shopping area	82.4%	12.9%	4.7%	100%
The heart of the city	84.1%	14.9%	1.0%	100%
The area's premiere dining and entertainment district	86.4%	8.8%	4.7%	100%
The city's heritage and cultural district	90.8%	7.5%	1.7%	100%



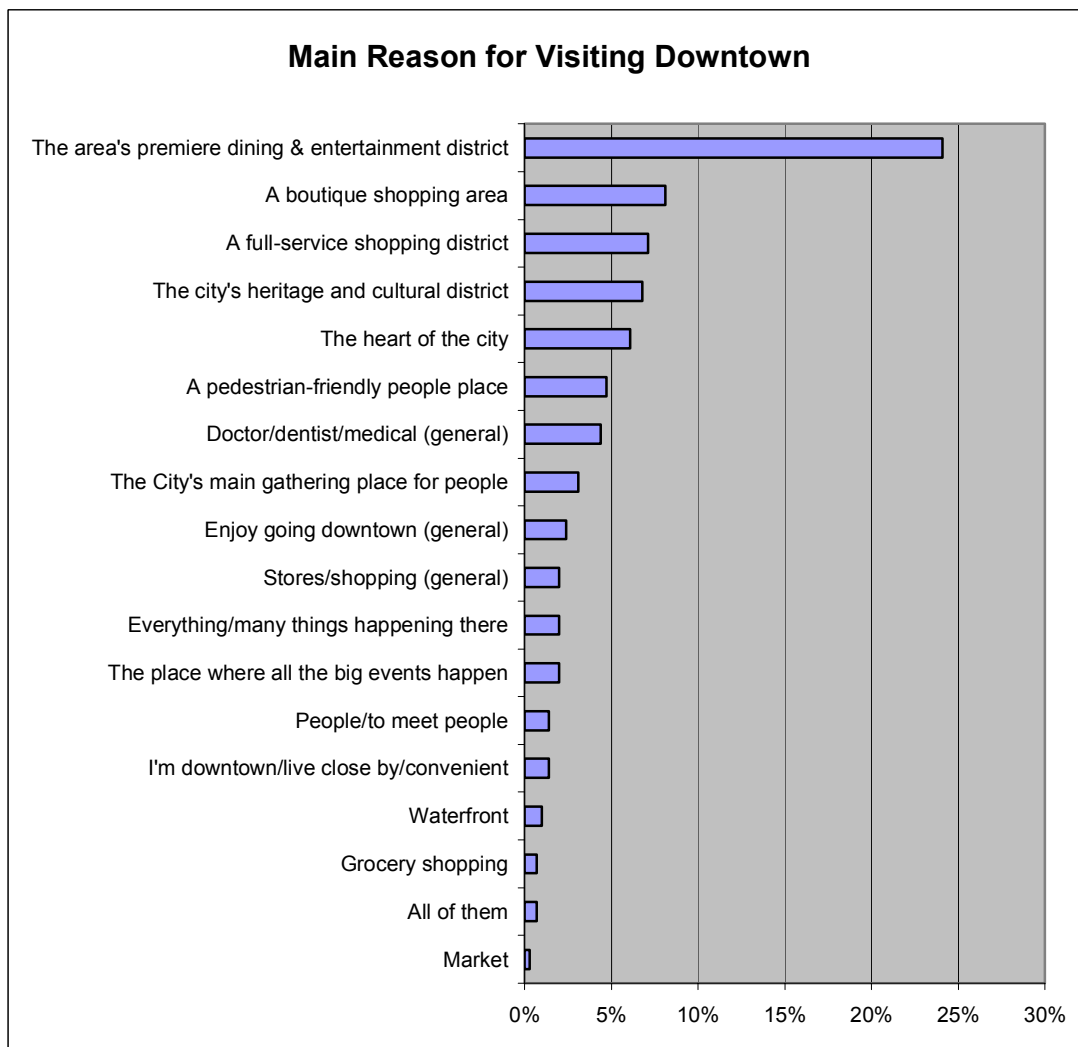
Main Reason for Visiting Downtown

After reviewing eight phrases that may or may not describe Downtown Kingston accurately, respondents were asked whether any of those phrases would describe the main reason they visit downtown. They were also invited to suggest other descriptions for the main reason they visit.

One driver of downtown visits clearly stood out as the leader – it is the area's premiere dining and entertainment district, and this result is shown graphically in the chart below.

While 24% of respondents named dining and entertainment as the main reason they visit downtown, 18% named various types of shopping as their main reason for visiting.

Q8a: Respondents were asked to confirm the phrases that describe or indicate the main reason they visit downtown Kingston:



Phrases which describe the main reason you visit downtown Kingston?		
Phrase	# Frequency	% Percentage
The area's premiere dining & entertainment district	71	24.1%
A boutique shopping area	24	8.1%
A full-service shopping district	21	7.1%
The city's heritage and cultural district	20	6.8%
The heart of the city	18	6.1%
A pedestrian-friendly people place	14	4.7%
Doctor/dentist/medical (general)	13	4.4%
The City's main gathering place for people	9	3.1%
Enjoy going downtown (general)	7	2.4%
Stores/shopping (general)	6	2.0%
Everything/many things happening there	6	2.0%
The place where all the big events happen	6	2.0%
People/to meet people	4	1.4%
I'm downtown/live close by/convenient	4	1.4%
Waterfront	3	1.0%
Grocery shopping	2	0.7%
All of them	2	0.7%
Market	1	0.3%
Other	18	6.1%
Don't Know/Can't Say	14	4.7%
No Reason Given	32	10.8%
	Total	295
		99.9%
No Answer	8	

Activity Profile with Visiting Friends and Family

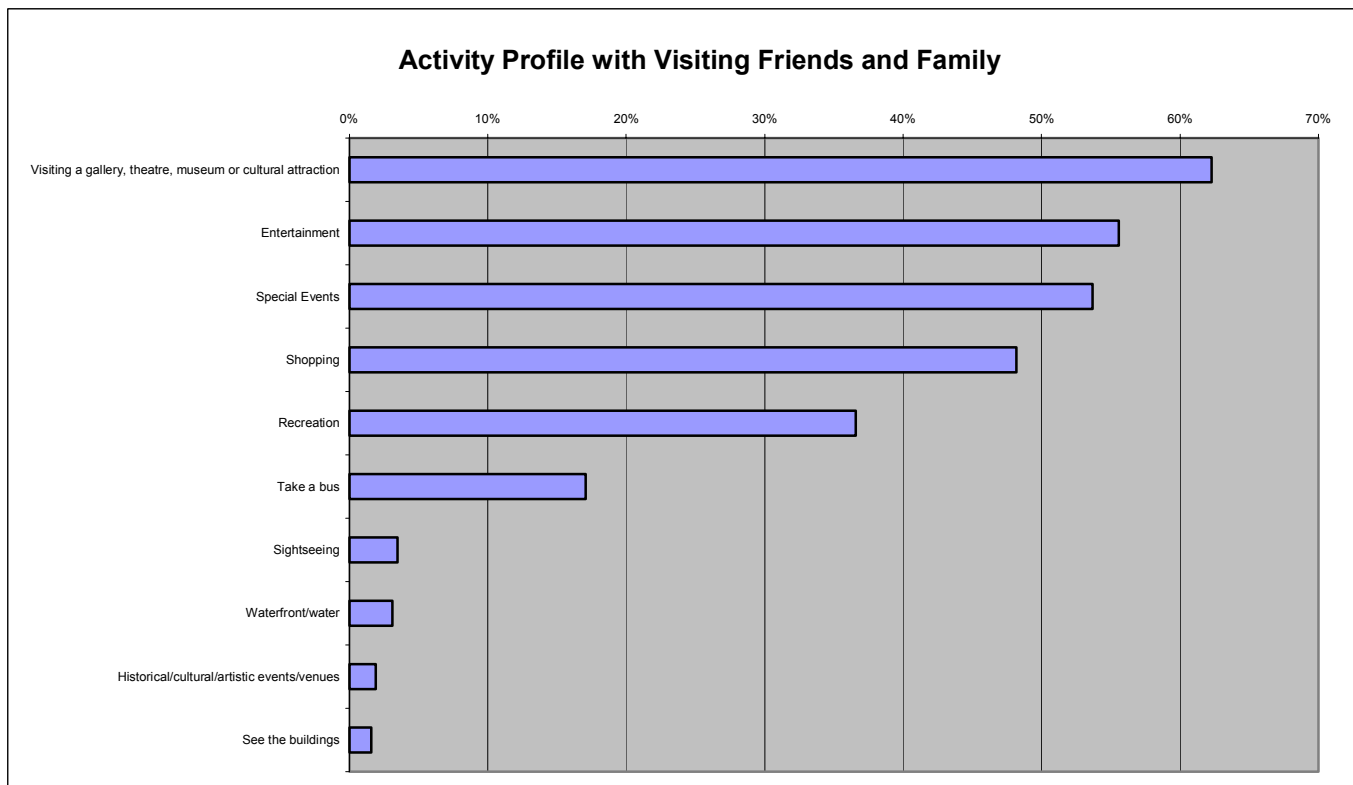
A significant component of the tourism industry involves visitors who are friends or family of local residents. Visitors also have a significant economic impact on shopping, entertainment, dining/nightlife and recreation sectors.

Respondents were asked whether they bring visiting family and friends downtown, and 85% said they do. The top downtown activities were:

- Visiting a gallery, theatre, museum or cultural attraction (62.3%)
- Entertainment (55.6%)
- Special events, (53.7%) and
- Shopping (48.2%).

Note: Percentages do not add to 100% because respondents were invited to name more than one reason why they visit downtown Kingston with friends and family.

Q9: When friends or family come to Kingston for a visit, do you bring them downtown for shopping, recreation, entertainment, dining/nightlife or special events?



When friends or family come to Kingston for a visit, do you bring them downtown for shopping, recreation, entertainment, dining/nightlife or special events? (If so, what do you do?)

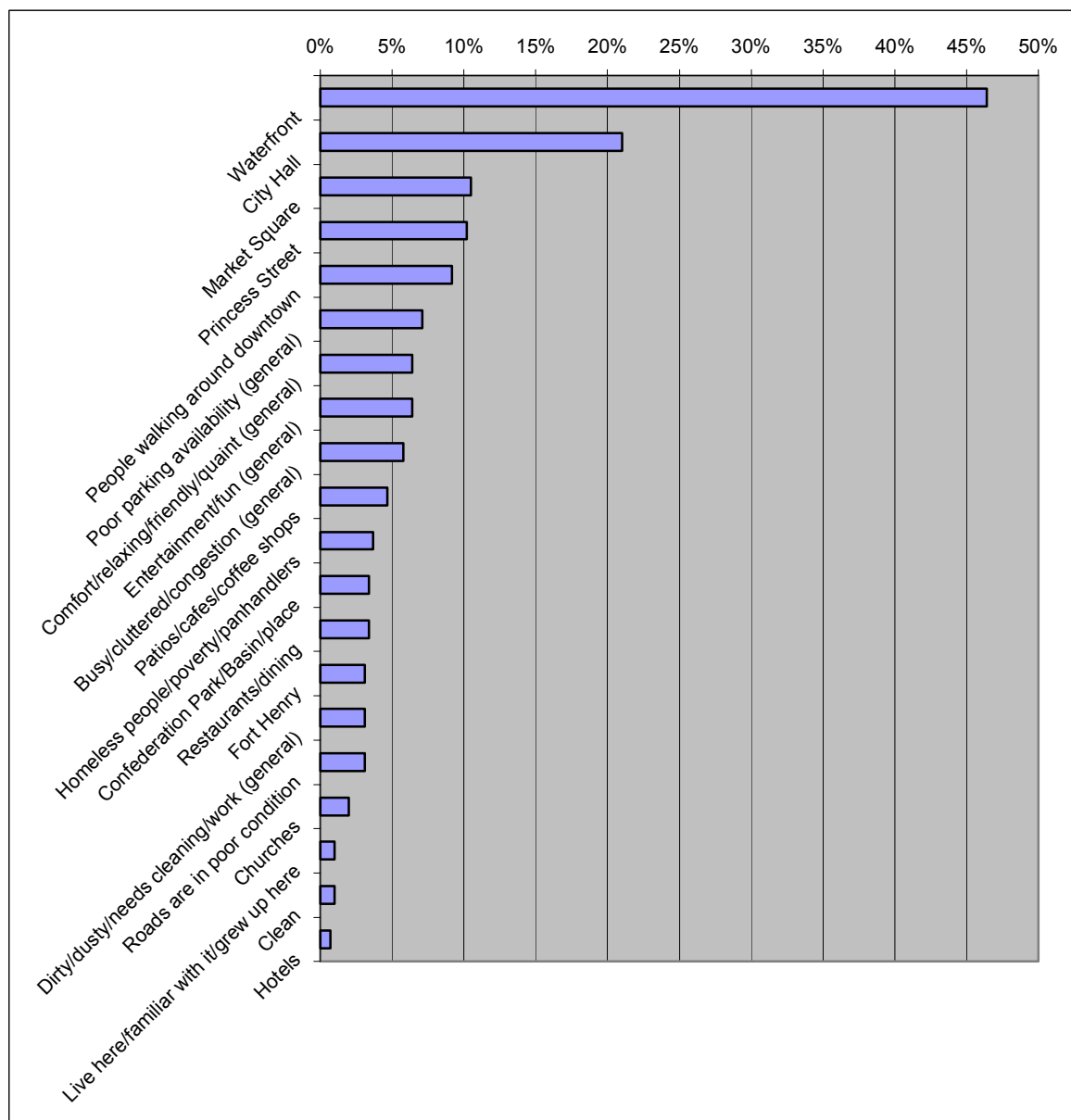
	# Frequency	% Percentage
Visiting a gallery, theatre, museum or cultural attraction	160	62.3%
Entertainment	143	55.6%
Special Events	138	53.7%
Shopping	124	48.2%
Recreation	94	36.6%
Take a bus	44	17.1%
Sightseeing	9	3.5%
Waterfront/water	8	3.1%
Historical/cultural/artistic events/venues	5	1.9%
See the buildings	4	1.6%
n=257		
No, don't bring them downtown	46	

Impressions of Downtown Kingston

Respondents were invited to suggest what images come to mind when they mentally picture downtown Kingston. The detailed results are presented in the table on the next page and the graphic chart below. Clearly the strongest image associated with downtown Kingston is the waterfront (mentioned by 45% of respondents) followed by City Hall (21%).

Please note that while the list below describes various images associated with downtown Kingston, they do not necessarily indicate whether respondents view those images positively or negatively, or whether they drive visits to the downtown. *Percentages do not add to 100% because respondents were invited to suggest more than one image.*

Q10: Respondents were asked to indicate what images come to mind when they mentally picture downtown Kingston.



When you mentally picture downtown Kingston, what images come to mind?

	# Frequency	% Percentage
Waterfront	137	45.2%
City Hall	62	20.5%
Market Square	31	10.2%
Princess Street	30	9.9%
People walking around downtown	27	8.9%
Poor parking availability (general)	21	6.9%
Comfort/relaxing/friendly/quaint (general)	19	6.3%
Entertainment/fun (general)	19	6.3%
Busy/cluttered/congestion (general)	17	5.6%
Patios/cafes/coffee shops	14	4.6%
Homeless people/poverty/panhandlers	11	3.6%
Confederation Park/Basin/place	10	3.3%
Restaurants/dining	10	3.3%
Fort Henry	9	3.0%
Dirty/dusty/needs cleaning/work (general)	9	3.0%
Roads are in poor condition	9	3.0%
Churches	6	2.0%
Live here/familiar with it/grew up here	3	1.0%
Clean	3	1.0%
Hotels	2	0.7%
n=303		

Priority Areas for Improvement

Suggestions for improvement to downtown...

Respondents were invited to suggest what they would most like to see improved about downtown Kingston. As might be expected from past studies, the top priority for improvement was parking, named by more than 40% of respondents in the sample. Please note that this question does not indicate whether or not these issues are barriers to visiting downtown -- only that they are priorities for improvement in the view of the respondents.

Q11: Respondents were asked to indicate what they would most like to see improved about Downtown:

What would you most like to see improved about Downtown Kingston?		
	#	%
	Frequency	Percentage
Parking	127	41.9%
Not enough shopping selection	38	12.5%
Roads/street condition	34	11.2%
Panhandlers	24	7.9%
Too much traffic	23	7.6%
Cleanliness	23	7.6%
Events/venues to attract people downtown	11	3.6%
Development of Block D/Ontario Street	10	3.3%
Improve sidewalks/cross walks	7	2.3%
More/improves sports/recreation facilities	6	2.0%
Improve bus/transit system	6	2.0%
Bike paths/safety for bikers	6	2.0%
Development of Market Square	4	1.3%
No more high rise buildings	4	1.3%
Waterfront	3	1.0%
More/improved conference/convention facilities	3	1.0%
More street lights downtown/side streets	3	1.0%
Too far away	2	0.7%
Bad weather	2	0.7%
Improve downtown housing (general)	2	0.7%
Restoration of heritage buildings/historical buildings	1	0.3%
Develop/improve Princess Street	1	0.3%
n=303		

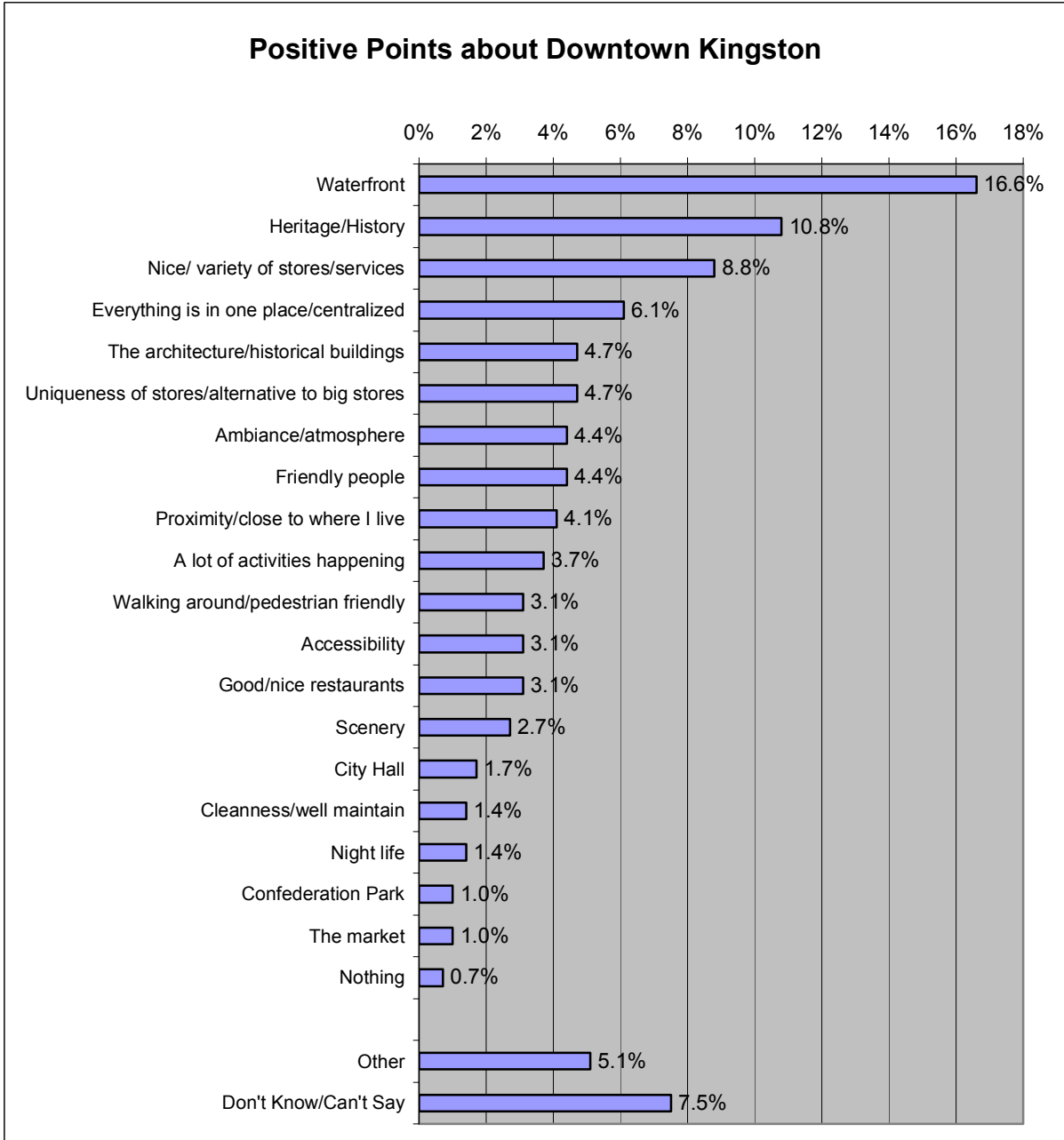
Downtown Kingston Positive Points

Respondents were invited to suggest what they consider to be the “greatest positive point” about downtown Kingston. While results indicate a wide range of positive points, two strong leaders were:

- the waterfront (16.6%) and
- heritage/history and architecture/historical buildings (10.8% and 4.7% respectively, for a group total of 15.5%).

Q12: Respondents were asked in their view, what was the greatest positive point about Downtown Kingston:

In your view, what is the greatest positive point about Downtown Kingston?		
	# Frequency	% Percentage
Waterfront	49	16.6%
Heritage/History	32	10.8%
Nice/ variety of stores/services	26	8.8%
Everything is in one place/centralized	18	6.1%
The architecture/historical buildings	14	4.7%
Uniqueness of stores/alternative to big stores	14	4.7%
Ambiance/atmosphere	13	4.4%
Friendly people	13	4.4%
Proximity/close to where I live	12	4.1%
A lot of activities happening	11	3.7%
Walking around/pedestrian friendly	9	3.1%
Accessibility	9	3.1%
Good/nice restaurants	9	3.1%
Scenery	8	2.7%
City Hall	5	1.7%
Cleanness/well maintain	4	1.4%
Night life	4	1.4%
Confederation Park	3	1.0%
The market	3	1.0%
Nothing	2	0.7%
Other	15	5.1%
Don't Know/Can't Say	22	7.5%
	Total	295
		100%
No Answer	8	



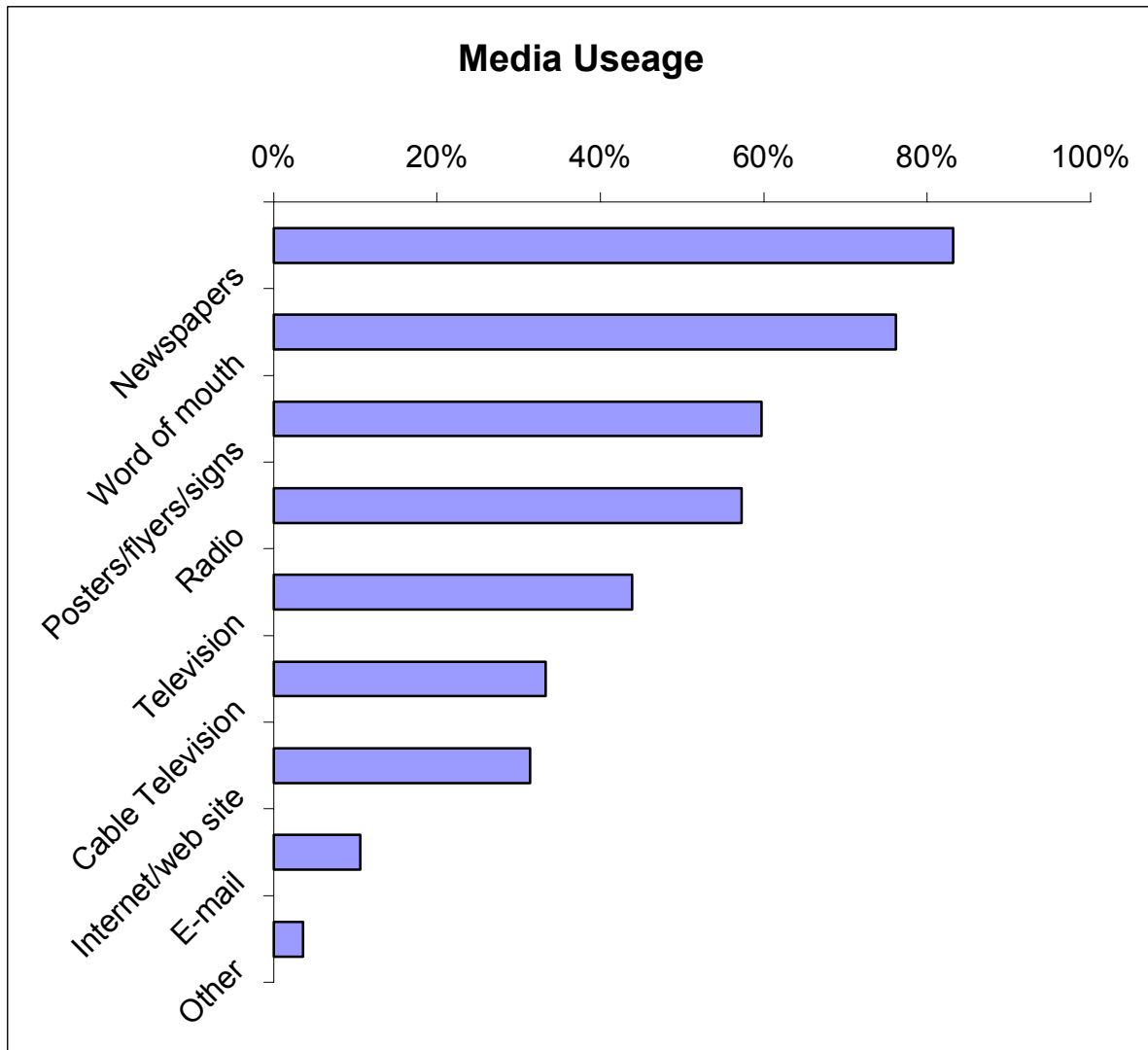
Sources of Information About Downtown Kingston

Interviewers first reviewed a list of various sources of information about downtown and then asked respondents to name which sources they use to learn about what's going on downtown. Detailed results are presented below, but we would point out that:

- More than three quarters rely on newspapers or word-of-mouth
- Almost 60% rely on radio or posters/flyers/signs

Please note: Percentages do not add to 100% because respondents were invited to indicate more than one source of information.

Q13: Respondents were asked: In which of the following ways do you learn about what's going on in downtown Kingston?



In which of the following ways do you learn about what's going on in downtown Kingston?

	# Frequency	% Percentage
Newspapers	252	83.2%
Word of mouth	231	76.2%
Posters/flyers/signs	181	59.7%
Radio	174	57.3%
Television	133	43.9%
Cable Television	101	33.3%
Internet/web site	95	31.4%
E-mail	32	10.6%
Other: <i>The Key to Kingston/</i> <i>City Booklet/Magazine</i>	8	2.6%
Other: Magazines (general)	3	1.0%
n=303		

FINAL DRAFT: Survey Questionnaire on Downtown Kingston Market

Hello _____ ... This is [NAME] calling from [NAME RESEARCH COMPANY].

We are doing a study on what people think about Kingston's downtown business area and about the experiences people have when they visit, shop, or attend an event there.

This is not a contest or promotion and we're not selling anything. All we want is your honest opinion. Individual responses are confidential... we provide only a summary of the overall results to our client.

We would like to speak to the person in your household who is 18 years of age or older, who has had the most recent birthday. Would that be you?

[IF NOT, ASK FOR THE PERSON TO COME TO THE PHONE AND REPEAT THE INTRODUCTION.]

The survey only takes about 10 minutes ... would you have a moment now?

[IF NOT, CALL BACK UP TO 8 TIMES.]

Thank-you for your time.

Before we start, to ensure you're eligible to take part in the survey, I need to ask whether you or anyone in your immediate family works for the media, or a marketing or advertising agency?

- If yes, disqualify. Explain reasons re: potential bias and thank them for their time.
- If no, proceed.

[DATA ENTRY NEEDED TO SCORE CALL STATS/COMPLETION RATES]

- Completed
 - Call back
 - Refused
 - Not eligible under screening criteria
 - Etc.
-

Let's start with your personal experience with Downtown Kingston

(1a) **First of all, do you live in the main downtown area or outside downtown?**

- 1 = Downtown [allow respondent to self-identify, but we mean the main downtown commercial area]
- 2 = Outside downtown
-
- [DO NOT READ]
- Don't know/Can't say

(1b) **Do you work on a regular basis in the main downtown business district or elsewhere in the Kingston area?**

- [PROBE FOR CLARIFICATION]
- 1 = Downtown in the main business/shopping district full-time or part-time
- 2 = Downtown generally [within walking distance of City Hall]
- 3 = Downtown, but not on a regular basis [that is, not full-time or regular part-time]
- 4 = Employed, but not downtown
- 5 = Not employed full-time or part-time
- 6 = Not employed - Student
- 7 = Not employed - Retired
-
- [DO NOT READ]
- Don't know/Can't say

2.0 I'm going to read you a list of possible reasons why some people visit downtown.
Have you visited Downtown Kingston in the past year for any purpose, such as
[ROTATE ORDER/STARTING POINT]

- 1 = attending a community event or festival
- 2 = a sports or recreation activity
- 3 = attending an entertainment event (show, movie, or concert performance)
- 4 = visiting an art gallery, theatre, museum or cultural attraction
- 5 = dining at a restaurant
- 6 = socializing on a patio or at a night club
- 7 = enjoying the waterfront
- 8 = showing around visiting friends and relatives
- 9 = shopping at stores
- 10=visiting outdoor markets, or
- 11=visiting a business, professional or government office, bank, or health care service?
- Other purposes _____
-
- [DO NOT READ]
- Don't know/Can't say

Check more than one whenever applicable.

Note to Interviewer: If respondent does NOT work or visit Downtown Kingston, please skip to closing questions (#14) for demo information.

3.0 How often do you visit downtown Kingston for any of these purposes that I have just read? Would you say you visit downtown Kingston...

- 3 or more times per week
- 1 or 2 times per week
- 2 or 3 times per month
- Once a month
- Less than once a month

Choose only one.

-
- [DO NOT READ]
 - Don't know/Can't say

Interviewer: If respondent asks -- going directly to and from home or work should not be counted, but activities outside work, such as a downtown employee shopping on a lunch break, should be counted.

4.0 Thinking of a typical visit to downtown, how much time on average would you spend downtown from the time you arrive until the time you leave?

- [DO NOT READ LIST]
- 15 minutes
 - 30 minutes
 - 45 minutes
 - 1 hour
 - 1 ¼ hours
 - 1 ½ hours
 - 1 ¾ hours
 - 2 hours
 - 2 ¼ hours

- 2 ½ hours
- 2 ¾ hours
- 3 hours
- 4 hours
- 5 hours
- 6 hours
- 7 hours
- 8 hours
- More than 8/Other

Amount: _____

-
- [DO NOT READ]
 - Don't know/Can't say

5.0 How do you usually travel to visit downtown Kingston. Do you usually ...

- Walk
- Drive
- Ride with someone else
- Take a bus
- Take a taxi
- Ride a bicycle
- Other

Check all that apply.

-
- [DO NOT READ]
 - Don't know/Can't say

6.0 Would you recommend downtown Kingston to your family and friends as a dining, commercial and shopping destination?

[DO NOT READ]

- 1 = Yes
- 2 = Yes, but only for certain things [such as groceries, entertainment, dining, nightlife]
- 3 = Maybe/depends
- 4 = No
- Don't Know/Can't Say

If YES or MAYBE: Skip to Q7.

(6a) If NO: What dining, commercial and shopping destination would you recommend? For instance ...

- 1 = The Cataraqui Town Centre [Interviewer: pronounced "Cat-a-rock-way"]
- 2 = Frontenac Mall / Wal-Mart
- 3 = Kingston Centre
- 4 = Rio-Can Centre
- 5 = Kingslake Plaza [Interviewer: if asked, this plaza is located near Division St. and Hwy. 401]
- Other: _____

[DO NOT READ]

- Different destinations for different purposes
- Don't know/Can't say

Check all that apply.

7.0 I going to read you a short list of different types of stores and businesses you might visit in the Kingston area. For each type, I'd like you to tell me the main place you would go -- either downtown or somewhere else for it. For instance, would downtown or somewhere else be the main place you would go for ...

[ROTATE ORDER/STARTING POINT]

- | | | | | |
|---|----------|----------------|------|-------|
| <input type="checkbox"/> Groceries | Downtown | Somewhere Else | Both | DK/CS |
| <input type="checkbox"/> General merchandise (like you find in discount, variety & department stores) | Downtown | Somewhere Else | Both | DK/CS |
| <input type="checkbox"/> Clothing, shoes and accessories | Downtown | Somewhere Else | Both | DK/CS |
| <input type="checkbox"/> Specialty retail goods (like camera/photo supplies, books, music flowers, jewellery, and sporting goods) | Downtown | Somewhere Else | Both | DK/CS |
| <input type="checkbox"/> Restaurants and nightclubs | Downtown | Somewhere Else | Both | DK/CS |
- [Interviewer note:
"restaurants" include fast food]

- Personal services (like a barber/beauty salon, travel agent, fitness centre, shoe repair or tailor) Downtown Somewhere Else Both DK/CS
- Professional services (like an accountant, financial consultant, lawyer, doctor, dentist) Downtown Somewhere Else Both DK/CS

8.0 I'm going to read a number of phrases that might be used to describe downtown Kingston. Some people say they apply; others say they don't fit. Please tell me whether you think the phrase is an accurate description of downtown Kingston or not:

[ROTATE ORDER/STARTING POINT]

- The city's main gathering place for people Accurate Not Accurate DK/CS
- A full-service shopping district Accurate Not Accurate DK/CS
- The area's premiere dining & entertainment district Accurate Not Accurate DK/CS
- The place where all the big events happen Accurate Not Accurate DK/CS
- A boutique shopping area Accurate Not Accurate DK/CS
- The city's heritage and cultural district Accurate Not Accurate DK/CS
- The heart of the city Accurate Not Accurate DK/CS
- A pedestrian-friendly people place Accurate Not Accurate DK/CS

8a Do any of those phrases describe the main reason you visit downtown Kingston?

[DO NOT READ UNLESS RESPONDENT ASKS TO REVIEW THE LIST]

- 1 = Yes The city's main gathering place for people
A full-service shopping district
The area's premiere dining & entertainment district
The place where all the big events happen
A boutique shopping area
The city's heritage and cultural district
The heart of the city
A pedestrian-friendly people place

Choose only one.

- 2 = No

If No: Probe for other main reason: _____

[DO NOT READ]

- Don't know/Can't say

9.0 When friends or family come to Kingston for a visit, do you bring them downtown for shopping, recreation, entertainment, dining/nightlife or special events?

[PROBE FOR MAIN REASON]

- 1 = Yes Shopping
 Recreation
 Entertainment
 Dining/nightlife
 Special Events
 Other

Check as many as apply.

- 2 = No

10.0 When you mentally picture downtown Kingston, what images come to mind?

[DO NOT READ OR PROMPT]

- 1 = City Hall
- 2 = Patios/cafés/coffee shops
- 3 = Waterfront
- 4 = Princess Street
- 5 = Market Square
- 6 = People walking around downtown
-
-
-
-

More than one image is okay. Accept up to five .

11.0 What would most like to see improved about Downtown Kingston?

[DO NOT READ]

- 1 = Parking
- 2 = Panhandlers
- 3 = Too far away
- 4 = Bad weather
- 5 = Too much traffic
- 6 = Not enough shopping selection
- Other _____
- Other _____

Probe for more than one point
... Is there anything else you would like to see improved?

12.0 In your view, what is the greatest positive point about Downtown Kingston?

13.0 In which of the following ways do you learn about what's going on in Downtown Kingston? Please name any that apply, even sometimes. How about ...

1 = Newspapers

2 = Radio

3 = Television

4 = Cable television

5 = Internet/web site

6 = E-mail

7 = Posters/flyers/signs

8 = Word of mouth

Other _____

Information to classify the data:

We have just a couple more questions, to help us classify the data and summarize the information about the views people have about Downtown Kingston. And as we said earlier, this information will be kept **confidential**.

I'd like you to tell me which response most closely describes your situation:

14.0 My age is:

18-24 years

25-34 years

35-49 years

50-64 years

65+ years

[DO NOT READ]

Don't know /can't say

N/ A - Not Applicable

15.0 My approximate household income level is:

- Under \$25,000
- \$25,000 to \$39,000
- \$40,000 to \$59,000
- \$60,000 to \$74,000
- \$75,000 and over

- [DO NOT READ]
- Don't know /can't say
 - N/ A - Not Applicable

16.0 The first three digits of my postal code are:

- K7K
- K7L
- K7M
- K7N
- K7P
- K0H
- K0K
- Other _____

- [DO NOT READ]
- Don't know /can't say
 - N/ A - Not Applicable

17.0 [Interviewer: Record Gender]

- Male
- Female

Thank-you very much for providing your opinions for this study. It will do much to help improve the experiences people have when they visit Downtown Kingston in the future.