FAST CONSULTING
Community Intelligence

DTN YXE
Downtown Saskatoon
2017 Perception Survey Report

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Executive Summary

On behalf of Downtown Saskatoon (DTNYXE), Fast Consulting conducted a perception survey with residents of Saskatoon and surrounding communities in June and July 2017. The survey's objective is to provide DTNYXE with a deeper understanding of current attitudes and perceptions of Saskatoon's Downtown environment.

A total of 501 people completed the online survey, which was accessed through the DTNYXE website. Although the Market Research and Intelligence Association (MRIA) suggests that a margin of error is not applicable in online surveys where participants are self-selected, it also recognizes that online research polls have proven to be reliable predictors of outcomes. Given this, we are confident that our sample size lets us say with a 95% level of certainty that the overall results of the survey are within plus or minus 4.4% of what they would be if the entire adult population of Saskatoon was polled (margin of error are larger for sub-groups).

Highlights

1 out of 10 Live Downtown, 2 out of 10 Work Downtown

- One in ten (10%) survey respondents live in Downtown Saskatoon. The majority of respondents (76%) live in the city, just not in the Downtown area. Another (14%) live just outside the city (e.g. Warman, Dalmeny, Martensville).
- Roughly a quarter (23%) of survey respondents work Downtown. This increases to 46% of those living Downtown. The likelihood of working Downtown is highest among ages 25-34 (42%), declining to 1% of ages 65+.

9 out of 10 Have Visited Downtown Within Past 3 Months

- Nearly all respondents (92%) have visited Downtown Saskatoon, for non-work reasons and outside of their work hours, within the past three months. This includes 59% who visited within the last week, 22% more than a week ago, but within the past month and 11% more than a month ago but within the past 3 months.
- Young people (ages 18-34) are the most likely to have visited Downtown within the last week. While the likelihood of visiting Downtown in the last 3 months declines with age, it nonetheless remains the large majority of respondents.
- People come Downtown for many non-work reasons. The two most frequently mentioned are shopping (73%) and restaurants/bars/clubs (58%). This is followed by professional services (47%), parks/outdoor activities/walks/runs (38%), live music/theatre/arts events (36%), events (27%), festivals/parades (26%), government services (25%), seasonal holiday entertainment/events (19%) and library/education events (18%).

8 out of 10 Come Downtown by Car

- People use multiple options to come Downtown on their non-work-related visits, but by far the most dominant means is car (85%). This is followed by walking (19%), public transit (11%), biking (6%) and car pooling (4%). Young people ages 18-24 more likely to use transit, walk and car pool, less likely to drive Downtown.

Events Draw People Downtown

- Events clearly attract people to the Downtown area. Respondents of all ages attended a wide variety of Downtown events in the past year, led by the Farmers' Market (51%), Taste of Saskatchewan (43%), SaskTel Saskatchewan Jazz Festival (32%), Sidewalk Sale (25%) and Fireworks Festival (24%). The top 3 events differ slightly by age:
    - **Ages 18-24**: Jazz Festival is the top Downtown draw, followed by a three-way tie among the Fireworks Festival, Farmers' Market and Taste of Saskatchewan, with Folkfest in third spot.
    - **Ages 25-44:** top three events are Farmers' Market, Taste of Saskatchewan and Jazz Festival.
    - **Ages 45-54**: Farmers' Market and Taste of Saskatchewan are top draws among this age cohort, followed by the 2nd Avenue Sidewalk Sale.
    - **Ages 55+:** Farmers' Market, Taste of Saskatchewan and Jazz Festival are also top draws among older respondents.

6 out of 10 Have Positive Impression of Downtown

- Six out of ten respondents (62%) have a positive impression of Downtown Saskatoon. Another 26% are neutral, while one out of ten (11%) have a negative impression.
- This positive impression is consistent among men and women. It is strongest, however, among young people—74% of ages 18-24 and 71% of ages 25-34 have a positive impression of Downtown Saskatoon.

8 out of 10 Likely to Recommend Downtown

- Eight out of 10 (77%) respondents would be at least somewhat likely to recommend a visit to Downtown Saskatoon, and five out of ten (52%) would be likely to extremely likely (8 – 10 on scale of one to ten). The likelihood of recommending Downtown is higher among men than women, as well as among 18-34 year-olds and 55-64 year-olds.

Young People, Women More Aware of DTNYXE Website

- More than a quarter (27%) of respondents are aware of the Downtown Saskatoon website. Six out of ten of them (61% or 17% of all respondents) have visited the DTN YXE site in the last year for information on events, restaurants, shopping, etc.
- Ages 18-24 are somewhat more aware of Downtown Saskatoon's website than older respondents, but much more likely to have visited the site in the last year. Women are also more likely to have visited in the last year.

3 out of 10 Would Consider Living Downtown

- Approximately 28% of respondents not currently residing Downtown would consider living there at some point. This drops to 17% of those who live just outside the city vs. 26% who live within the city. The likelihood of considering living Downtown declines with age, from 48% of ages 18-24 to 19% of ages 65+.

9 out of 10 Feel Safe Downtown in Daytime, 3 out of 10 at Nighttime

- The large majority (89%) of respondents feel safe walking or cycling in Downtown Saskatoon during the daytime, including 44% who feel 'very safe'. In contrast, roughly a third (34%) of respondents feel safe walking or cycling Downtown during the nighttime, with 5% feeling 'very safe'. These findings are in consistent with findings in the City of Saskatoon's 2015 Annual Civic Services survey, which found that 89% of residents felt safe walking or cycling in Downtown Saskatoon during the daytime and 37% during the nighttime.
- Women tend to feel less safe walking or cycling Downtown, at 80% vs. 86% of men during the day and 23% vs. 42% of men at night.

Ages 18-35 Prefer Midtown Plaza News via Multiple Channels

- Overall, respondents want to hear about new stores, upcoming sales and promotional events at Midtown Plaza through multiple media channels. Radio and Facebook are tied for the most frequently mentioned channel, at 47% of respondents each. Traditional media channels follow: flyers sent to the home (42%), television (37%), outdoor posters, billboards, buses and benches (29%) and print newspapers (27%). Social media is also key: 25% say the DTN YXE website is the best way to inform them, 12% say Instagram and 11% say Twitter.
- Drilling down into survey results by gender and age confirms that social media has become a mainstream channel for communicating information about the Midtown Plaza—particularly among the younger demographic. Ages 18-44 are most likely to name Facebook as the best way to communicate with them about Midtown Plaza, but is also a preferred channel for roughly a quarter of respondents ages 55+. Facebook is also a more popular choice among women.
    - Instagram and Twitter are popular channels among ages 18-34, but appear to decline after age 35. Women seem to prefer Instagram, while men favour Twitter.
    - Radio is a popular communication channel across age and gender groups.
    - The preference for outdoor media (posters, billboards, buses, benches, etc.) decreases with age, from nearly half of ages 18-24 to a fifth of ages 55+.
    - The preference for flyers sent to the home, television and print newspapers increases with age. Men are also somewhat more likely to prefer these traditional channels.
    - The Downtown Saskatoon website is a preferred channel for news about Midtown Plaza for roughly a fifth to a quarter of respondents across gender and age groups, with a spike among ages 55-64.

Perceptions of Downtown Saskatoon

Respondents are asked a series of statements about Downtown Saskatoon to gauge their perception of various amenities and attributes, along with the importance they place on those amenities and attributes. The gap between perception and importance highlights areas where general perceptions of Downtown Saskatoon can be improved.

Room to Improve Perception of Downtown …

- Downtown is easy to get to via public transit—33% agree with this statement, but 90% say this is important. The gap of 57 percentage points indicates significant room for improvement in the perception of public transit access to Downtown Saskatoon.
- There is also a significant gap (57 percentage points) between the perception of Downtown as having one of a kind options not found elsewhere in Saskatoon (41% agree) and the perceived importance of such options (97%, virtually all respondents).
- Over a third (37%) of respondents agree that Downtown is/would be a good place to live—twice as many (79%) say it is important that Downtown is a good place to live, a gap of 42 percentage points.
- Over half (56%) of respondents agree that Downtown is the commercial business core of Saskatoon, while the vast majority (93%) think this is important, a gap of 37 percentage points.
- Two-thirds (67%) agree Downtown would be an affordable place to live/has affordable places to live, compared to 92% who say it is important that Downtown is an affordable place to live, a gap of 25 percentage points.
- Approximately half (52%) of respondents agree that Downtown has a good balance of pedestrian, cyclist and other forms of transportation. Over three-quarters (79%) think a balance of transportation options is important, a gap of 27 percentage points.
- While three-quarters (76%) agree Downtown is clean and attractive, 97% (virtually all respondents) think this is important, a gap of 21 percentage points.

Generally Positive Perception of Downtown …

- Respondents appear generally satisfied with parking, including 70% who agree Downtown has affordable parking compared to 83% who think this is important, a gap of 13 percentage points.
- Three-quarters (75%) agree Downtown has adequate/convenient parking compared to 78% who think this is important, a minimal 3-point gap.

Majority Have Positive Perception of Downtown Ambiance

- Seven out of ten (70%) agree Downtown is the cultural district of Saskatoon compared to 86% who say this is important to them, a gap of 16 percentage points.
- Seven out of ten (72%) agree Downtown is the heart of the city compared to 88% who say this is important to them, a 16-point gap.
- Eight out of ten (82%) agree Downtown is a good place to work compared to 93% who say this is important to them, a 11-point gap.

- Seven out of ten (72%) agree Downtown is a place they like to take people when they visit compared to 80% who say this is important to them, an 8-point gap.
- Seven out of ten (71%) agree Downtown is family friendly compared to 76% who say this is important to them, a 5-point gap.
- Eight out of ten (87%) agree Downtown is highly walkable compared to 89% who say this is important to them, a 2-point gap.

Majority Also Have Positive Perception of Downtown Social and Retail Amenities

- Seven out of ten (73%) agree Downtown offers a variety of cultural activities, theatre options and events, compared to 84% who think this is important, an 11-point gap.
- Seven out of ten (69%) agree Downtown has good variety of community / public gathering spaces, compared to 78% who think this is important, a 9-point gap.
- Eight out of ten (85%) agree Downtown has a unique mix of local restaurants and clubs, while 94% think this is important, a 9-point gap.
- Eight out of ten (81%) agree Downtown offers a unique experience unlike any other area in Saskatoon, while 89% think this is important, an 8-point gap.
- Seven out of ten (75%) agree Downtown offers a variety of good residential options for people who want to live Downtown, compared to 78% who think this is important, a minimal 3-point gap
- Eight out of ten (85%) agree Downtown has a unique mix of retail shopping experiences at Midtown Plaza and other retail stores, essentially the same percentage (86%) who think this is important.
- Nine out of ten 90% agree Downtown has good connections with the surrounding districts of Riversdale and Broadway, and nine out of ten (90%) think this is important.

Downtown Is Surpassing Expectations …

- Nine out of ten (92%) agree Downtown has good access to open green spaces and Meewasin Valley trails compared to 87% who think this is important. The minus 5 percentage point gap between perception and importance indicates that Downtown is seen as performing well in this area.
- Nine out of then (93%) agree Downtown has a variety of food truck and parking patio options compared to 74% who think this is important. Again, a gap of minus 19 percentage points shows that Downtown is seen as performing very well in this area.

Methodology

On behalf of Downtown Saskatoon (DTNYXE), Fast Consulting conducted an online survey with residents of Saskatoon and surrounding communities to better understand current attitudes and perceptions of Saskatoon's Downtown environment.

Survey Sample

The online survey was available for access through the DTNYXE website from June 26 to July 7, 2017. A total of 501 people completed the online survey.[1] A Although the Market Research and Intelligence Association (MRIA) suggests that a margin of error is not applicable in online surveys where participants are self-selected, it also recognizes that online research polls have proven to be reliable predictors of outcomes. Given this, we are confident that our sample size lets us say with a 95% level of certainty that the overall results of the survey are within plus or minus 4.4% of what they would be if the entire adult population of Saskatoon was polled. Margins of error are larger for sub-groups (e.g. age, gender).

Data Checking

Data checking procedures were used at all times and statistical analysis of survey data was done using the industry standard SPSS computer program (Statistical Package for Social Sciences).

Privacy

Fast Consulting protects personal and private information against such risks as loss, theft, unauthorized access, disclosure, copying, use, modification, or destruction, through appropriate security measures that includes password protected computers and servers, and encryption protocol. Consultants and employees with access to personal information are contractually required to respect the confidentiality of that information.

[1] The Market Research and Intelligence Association (MRIA) suggests that because online survey participants are self-selected, a margin of sampling error should not be calculated or quoted. The MRIA also recognizes, however, that online research polls have for a number of years produced results that have proven to be reliable estimates of public opinion.

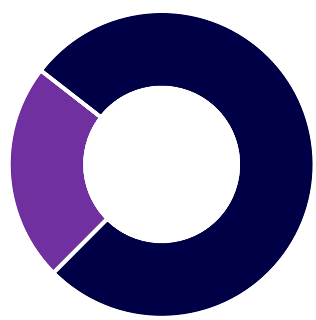
Survey Results

Live / Work Downtown

Q. Which of the following applies to you?

- One in ten (10%) survey respondents live in Downtown Saskatoon. The majority (76%) live in the city, but not in the Downtown area. Another (14%) live just outside the city (e.g. Warman, Dalmeny, Martensville).

Q. Do you work Downtown?



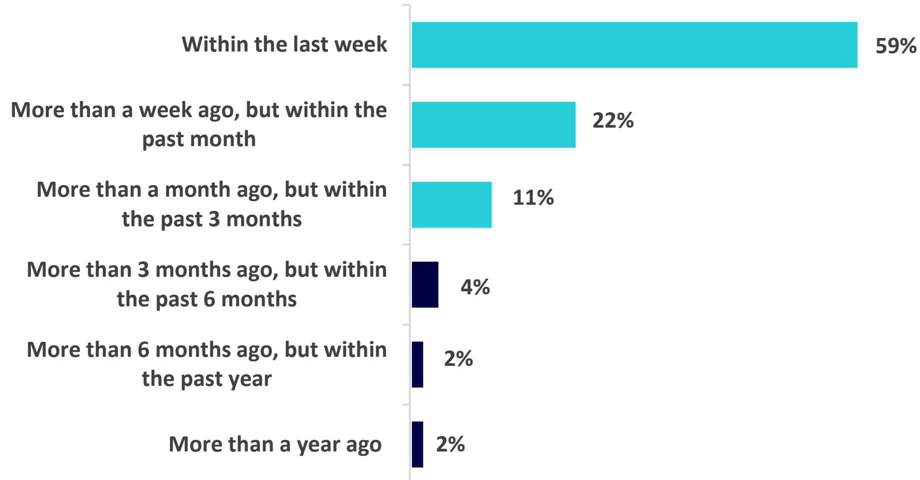
- Overall, roughly a quarter (23%) of survey respondents work Downtown, while most (77%) do not. Nearly half (46%) of those who live Downtown also work Downtown.
- The likelihood of working Downtown decreases with age, from 42% of ages 25-34 to just 1% of ages 65+.

Young People More Likely to Work Downtown

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Work Downtown	**34%**	**42%**	**28%**	**24%**	**12%**	**1%**	**23%**	**23%**	**23%**

Visitation

Q. *When was the last time you visited Downtown Saskatoon for non-work reasons outside of your work hours?*



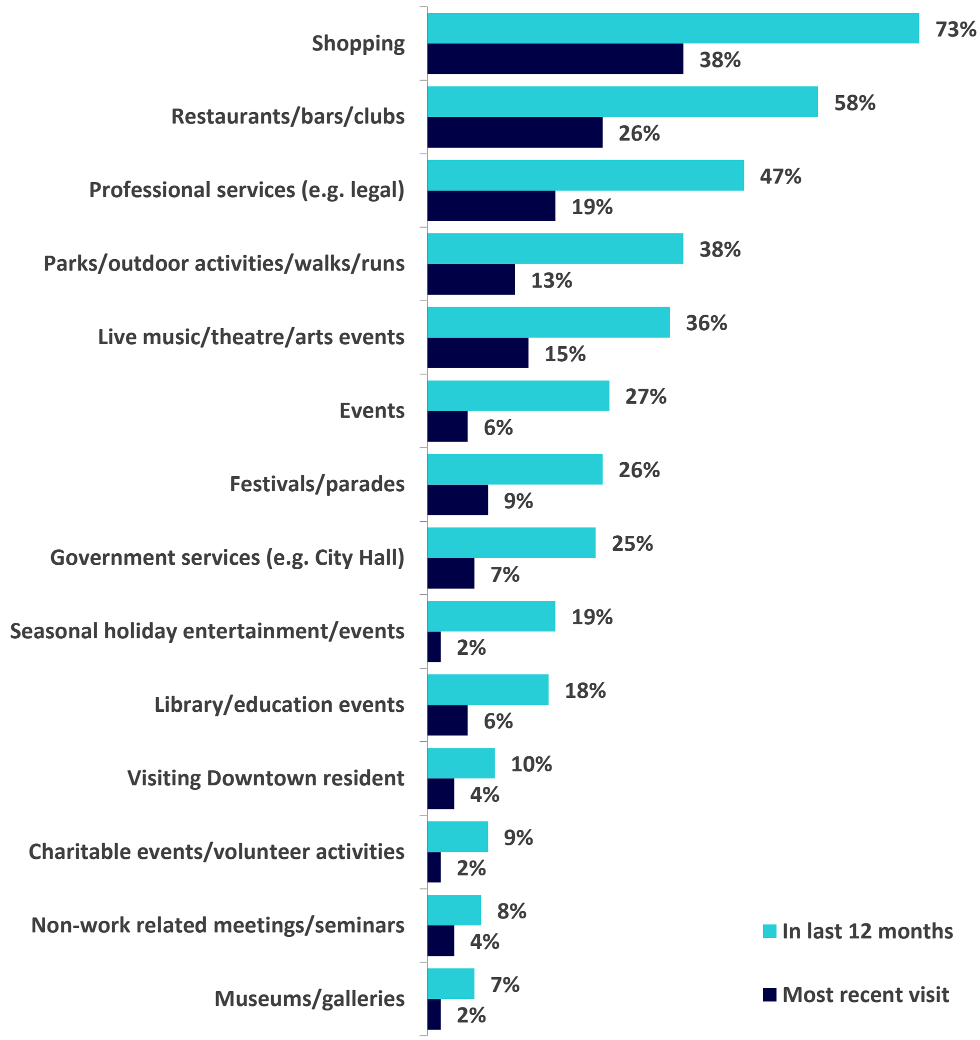
- Nearly all respondents (92%) have visited Downtown Saskatoon for non-work reasons, and outside of their work hours, within the past three months, including:
  - 59% who have visited within the last week
  - 22% visited more than a week ago, but within the past month
  - 11% more than a month ago but within the past 3 months.
- Young people (ages 18-34) are the most likely to have visited Downtown within the last week; men are also more likely than women to have visited in the last week.
- Although the likelihood of visiting Downtown Saskatoon within the last 3 months declines somewhat with age, it nonetheless remains the large majority of respondents.

Young People Most Frequent Downtown Visitors (for Non-Work Reasons)

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Within last week	68%	68%	63%	55%	54%	49%	64%	55%	59%
Over a week ago, but within past month	21%	21%	18%	24%	25%	24%	19%	24%	22%
Over a month ago, but within past 3 months	11%	10%	12%	11%	10%	12%	7%	14%	11%
WITHIN PAST 3 MTHS	100%	99%	93%	90%	89%	85%	90%	93%	92%

Reasons for Visiting Downtown

Q. What are all the non-work reasons you have visited Downtown Saskatoon in the last 12 months? What are the non-work reasons for your most recent visit Downtown?



**Multiple response allowed.*

- Respondents visit Downtown Saskatoon for many non-work reasons—shopping and restaurants/bars/clubs are the two most frequently mentioned reasons for visiting within the last 12 months, at 73% and 58%, respectively.
- In the last 12 months, respondents have also visited Downtown for professional services (47%), parks/outdoor activities/walks/runs (38%), live music/theatre/arts events (36%), events (27%), festivals/parades (26%), government services (25%), seasonal holiday entertainment/events (19%) and library/education events (18%).
- Respondents' generally cite the same reasons for their most recent visit Downtown.

Top Non-Work Reasons for Visiting Downtown Saskatoon in Past 12 Months, by Age

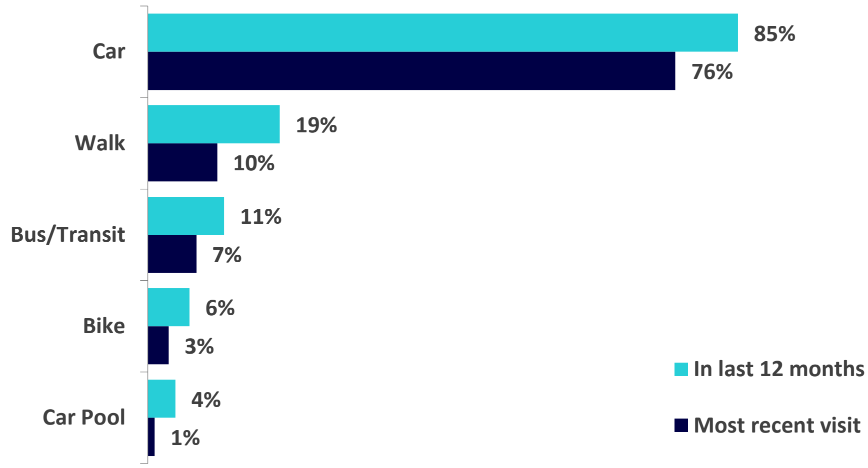
Young Adults	Ages 18-24		Ages 25-34
Shopping	**74%**	**Shopping**	**75%**
Parks/outdoor activities	**58%**	**Restaurants/bars/clubs**	**73%**
Restaurants/bars/clubs	**55%**	**Parks/outdoor activities**	**50%**
Live music/theatre/arts events	**37%**	**Festivals/parades**	**40%**
Festivals/parades	**37%**	**Professional services**	**38%**
Professional services	34%	Live music/theatre/arts events	38%
Government services	32%	Events	36%
Events	29%	Government services	21%
Library/education events	24%	Seasonal holiday events	21%
Seasonal holiday events	21%	Library/education events	19%

Adults	Ages 35-44		Ages 45-54
Shopping	**83%**	**Shopping**	**73%**
Restaurants/bars/clubs	**59%**	**Restaurants/bars/clubs**	**58%**
Professional services	**45%**	**Professional services**	**38%**
Parks/outdoor activities	**41%**	**Live music/theatre/arts events**	**36%**
Live music/theatre/arts events	**40%**	**Events**	**27%**
Events	29%	Parks/outdoor activities	26%
Festivals/parades	29%	Government services	26%
Government services	29%	Festivals/parades	18%
Library/education events	17%	Seasonal holiday events	15%
Seasonal holiday events	16%	Library/education events	15%

Older Adults	Ages 55-64		Ages 65+
#1 Shopping	**78%**	**Professional services**	**65%**
#2 Restaurants/bars/clubs	**60%**	**Shopping**	**64%**
#3 Professional services	**60%**	**Restaurants/bars/clubs**	**47%**
Live music/theatre/arts events	**41%**	**Live music/theatre/arts events**	**30%**
Parks/outdoor activities	**39%**	**Parks/outdoor activities**	**22%**
Government services	29%	Government services	20%
Events	27%	Seasonal holiday events	19%
Seasonal holiday events	26%	Events	14%
Festivals/parades	24%	Library/education events	14%
Library/education events	22%	Festivals/parades	12%

Getting Downtown

Q. When you visited Downtown for non-work reasons, how did you get there?



**Multiple response allowed for mode of transportation for previous 12 months.*

**One response for most recent visit*

- On non-work-related visits to Downtown Saskatoon in the last 12 months, the large majority (85%) of respondents came by car. Approximately 19% walked, 11% used public transit, 6% biked and 4% car pooled.
- The pattern is essentially the same when respondents are asked about their most recent visit—76% came Downtown by car, 10% walked, 7% took transit, 3% biked and 1% car pooled.
- Young people ages 18-24 are less likely than their older counterparts to drive and more likely to use transit, walk and/or car pool Downtown.

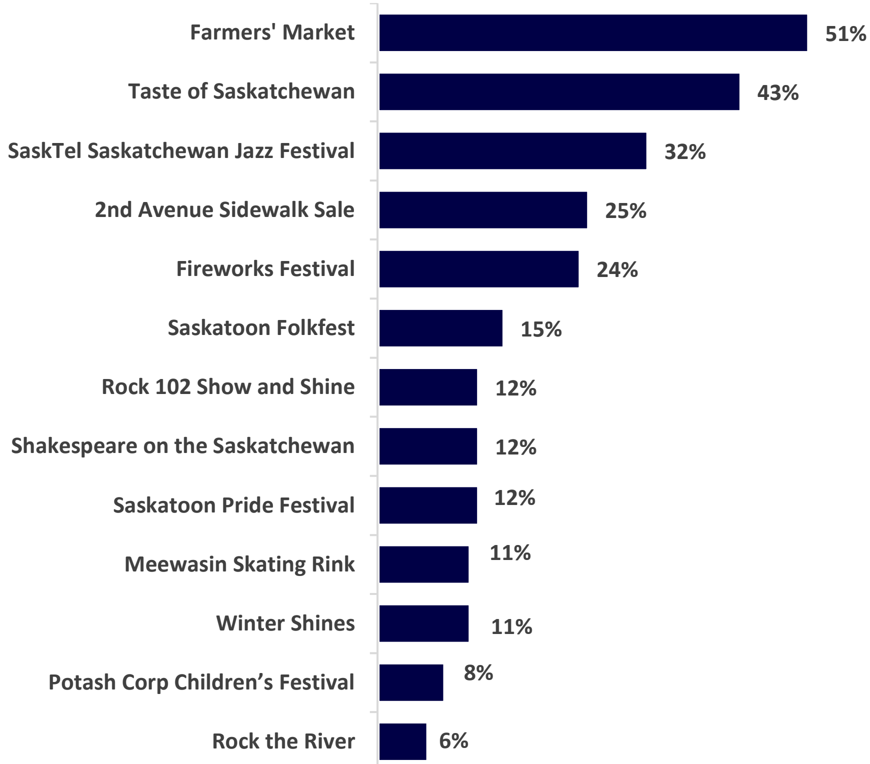
Young People Most Likely to Take Transit, Walk and Car Pool to Downtown in last 12 months

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Car	74%	87%	84%	89%	91%	90%	84%	89%	85%
Walk	29%	21%	18%	18%	16%	17%	19%	19%	19%
Bus/Transit	40%	11%	7%	10%	11%	7%	10%	13%	11%
Bike	11%	6%	9%	3%	8%	4%	9%	4%	6%
Car Pool	18%	7%	1%	1%	2%	3%	2%	5%	4%

Multiple Response for mode of transportation last 12 months

Attendance at Downtown Events

Q. Have you attended any of the following events in Downtown Saskatoon in the past year?



**Multiple response allowed.*

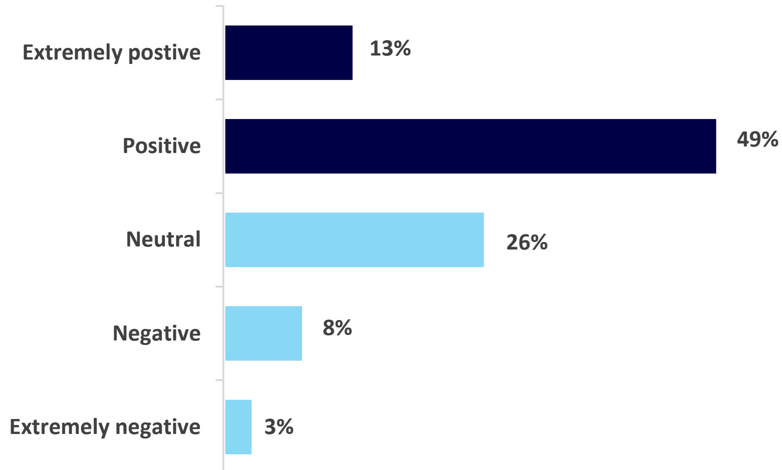
- Respondents attended a wide variety of events in Downtown Saskatoon in the past year, led by the Farmers' Market (51%), Taste of Saskatchewan (43%), SaskTel Saskatchewan Jazz Festival (32%), Sidewalk Sale (25%) and Fireworks Festival (24%).
- Downtown events attract all ages, although the top 3 events differ slightly by age:
  - **Ages 18-24**: Jazz Festival is the top Downtown draw, followed by a three-way tie among the Fireworks Festival, Farmers' Market and Taste of Saskatchewan, with Folkfest in third spot.
  - **Ages 25-44:** top three events are the Farmers' Market, Taste of Saskatchewan and Jazz Festival.
  - **Ages 45-54**: Farmers' Market and Taste of Saskatchewan are also top draws among this age cohort, followed by the 2nd Avenue Sidewalk Sale.
  - **Ages 55+:** Farmers' Market, Taste of Saskatchewan and Jazz Festival are also top draws among older respondents.

Top 5 Downtown Events, by Age

Young Adults	**Ages 18-24**		**Ages 25-34**
SaskTel SK Jazz Festival	**45%**	**Farmers' Market**	**55%**
Fireworks Festival	**40%**	**Taste of Saskatchewan**	**53%**
Farmers' Market	**40%**	**SaskTel SK Jazz Festival**	**34%**
Taste of Saskatchewan	**40%**	**Fireworks Festival**	**31%**
Folkfest	**29%**	**Folkfest**	**26%**
Meewasin Skating Rink	26%	2nd Avenue Sidewalk Sale	25%
2nd Avenue Sidewalk Sale	21%	Saskatoon Pride Festival	22%
Rock 102 Show and Shine	21%	Potash Corp Children's Festival	16%
Saskatoon Pride Festival	18%	Winter Shines	13%
Shakespeare on the Saskatchewan	18%	Meewasin Skating Rink	11%
Winter Shines	16%	Rock 102 Show and Shine	10%
Potash Corp Children's Festival	11%	Rock the River	10%
Rock the River	5%	Shakespeare on the Saskatchewan	9%
Adults	**Ages 35-44**		**Ages 45-54**
Farmers' Market	**51%**	**Farmers' Market**	**45%**
Taste of Saskatchewan	**43%**	**Taste of Saskatchewan**	**40%**
SaskTel SK Jazz Festival	**32%**	**2nd Avenue Sidewalk Sale**	**28%**
Fireworks Festival	**21%**	**Fireworks Festival**	**23%**
2nd Avenue Sidewalk Sale	**19%**	**SaskTel SK Jazz Festival**	**20%**
Saskatoon Pride Festival	15%	Rock 102 Show and Shine	15%
Winter Shines	15%	Folkfest	13%
Folkfest	11%	Meewasin Skating Rink	13%
Meewasin Skating Rink	10%	Rock the River	12%
Potash Corp Children's Festival	9%	Saskatoon Pride Festival	9%
Rock 102 Show and Shine	7%	Shakespeare on the Saskatchewan	8%
Shakespeare on the Saskatchewan	7%	Winter Shines	8%
Rock the River	3%	Potash Corp Children's Festival	5%
Older Adults	**Ages 55-64**		**Ages 65+**
Farmers' Market	**58%**	**Farmers' Market**	**48%**
Taste of Saskatchewan	**44%**	**Taste of Saskatchewan**	**30%**
SaskTel SK Jazz Festival	**35%**	**SaskTel SK Jazz Festival**	**30%**
2nd Avenue Sidewalk Sale	**27%**	**2nd Avenue Sidewalk Sale**	**26%**
Fireworks Festival	**20%**	Fireworks Festival	16%
Shakespeare on the Saskatchewan	18%	Shakespeare on the Saskatchewan	14%
Rock 102 Show and Shine	14%	Folkfest	12%
Meewasin Skating Rink	10%	Rock 102 Show and Shine	10%
Folkfest	8%	Winter Shines	8%
Winter Shines	8%	Saskatoon Pride Festival	6%
Rock the River	7%	Meewasin Skating Rink	4%
Potash Corp Children's Festival	6%	Potash Corp Children's Festival	1%
Saskatoon Pride Festival	4%	Rock the River	0%

Impression

Q. Overall, what is your impression of Downtown Saskatoon?



- Six out of ten respondents (62%) have a positive impression of Downtown Saskatoon, including 13% who have an 'extremely positive' impression. Another 26% are neutral, while one out of ten (11%) have a negative impression.
- This positive impression is consistent among men and women. It is strongest, however, among young people—74% of ages 18-24 and 71% of ages 25-34 have a positive impression of Downtown Saskatoon.

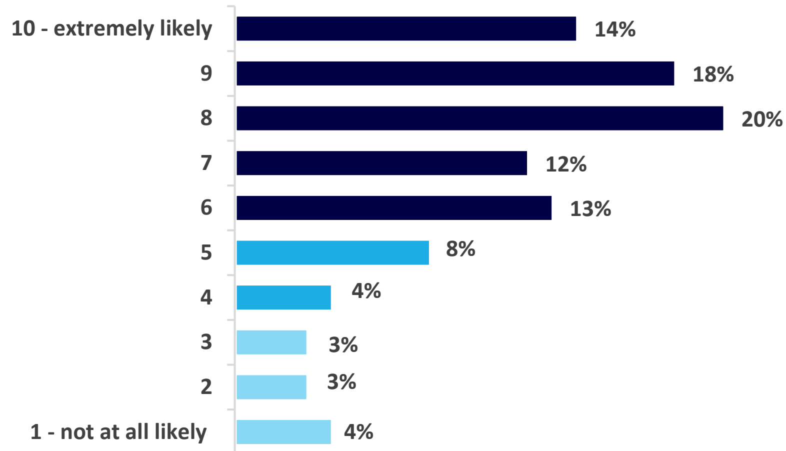
Young People More Likely to Have Positive Impression of Downtown[2]

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Extremely positive	32%	15%	11%	9%	11%	10%	12%	14%	13%
Positive	42%	56%	51%	36%	58%	43%	51%	48%	49%
OVERALL POSITIVE	74%	71%	62%	45%	69%	53%	63%	62%	62%
Neutral	24%	23%	27%	36%	24%	25%	24%	28%	26%
Negative	2%	6%	11%	19%	7%	22%	13%	10%	11%

[2] For comparison, the same question asked in a survey of Edmonton residents about downtown Edmonton in 2014 indicated very similar results to Saskatoon; 9% said extremely positive, 54% said positive, 21% neutral, 13% negative and 3% very negative.

Likely to Recommend

Q. On a scale of 0 to 10, where 0 is not at all and 10 is extremely likely, how likely would you be to recommend to friends and visitors that they visit Downtown Saskatoon?



- Eight out of 10 (77%) respondents would be at least somewhat likely to recommend a visit to Downtown Saskatoon, including 52% who would be likely to extremely likely (8 – 10 on scale) to do so. While another 12% might recommend a visit (4 – 5 on scale) approximately 10% would be unlikely (1 to 4 on scale) to do so.
- The likelihood of recommending a visit Downtown is higher among men than women, as well as among 18-34 year-olds and 55-64 year-olds.

Young People Most Likely to Recommend

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Likely to recommend	**87%**	**84%**	**79%**	**63%**	**83%**	**69%**	**87%**	**79%**	**77%**
Neutral	**5%**	**11%**	**16%**	**20%**	**11%**	**11%**	**12%**	**13%**	**12%**
Unlikely to recommend	**8%**	**6%**	**6%**	**17%**	**6%**	**20%**	**11%**	**8%**	**10%**

Net Promoter Score (NPS) -3

The Net Promoter Score (NPS) is calculated by subtracting the percentage of respondents who are Detractors from the percentage of respondents who are Promoters. Those who respond with a likelihood to recommend score of 9 or 10 are called Promoters, and are considered likely to exhibit value-creating behaviours, such as visiting more often and making more positive referrals to other residents. Those who respond with a score of 0 to 6 are labelled Detractors, and they are believed to be less likely to exhibit the value-creating behaviours. Responses of 7 and 8 are labelled Passives, and their behaviour falls in the middle of Promoters and Detractors.

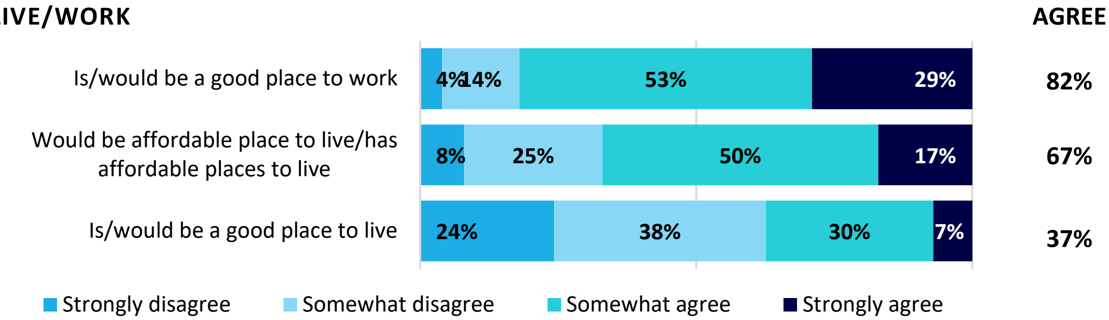
The NPS can range on a scale from a high of +100 if everyone is a promoter to a low of –100 if everyone is a detractor. The NPS for Downtown Saskatoon is -3, which is considered just below the mid-range.

Perceptions of Downtown

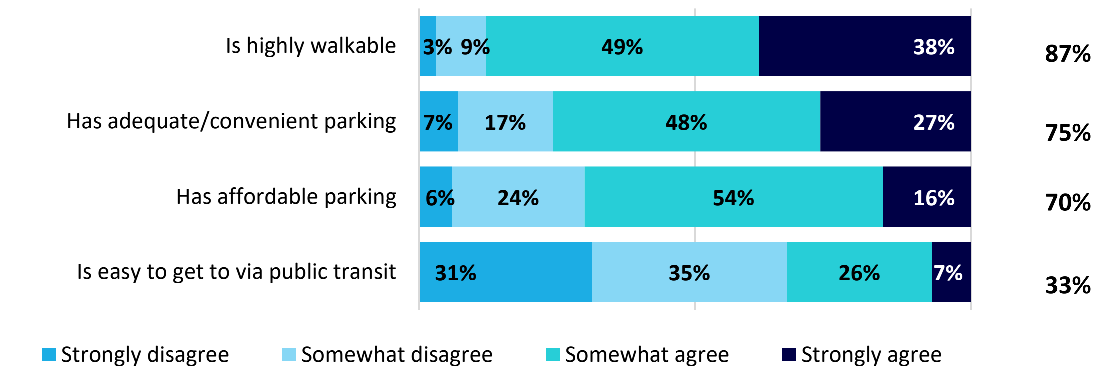
General Perceptions

Q. Would you agree or disagree that Downtown Saskatoon …?

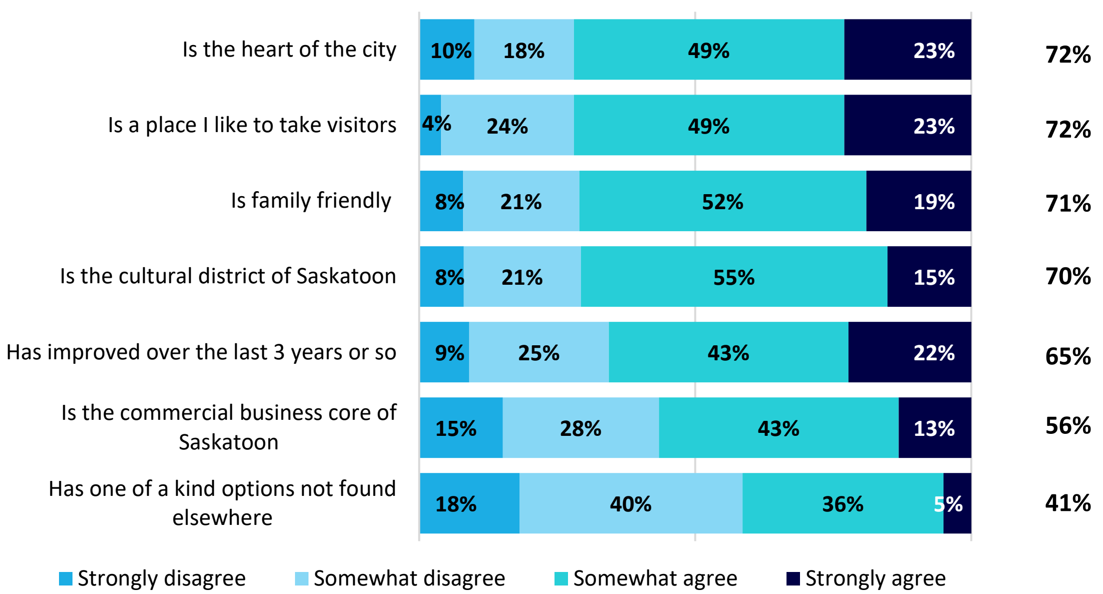
LIVE/WORK



ACCESS



AMENITIES

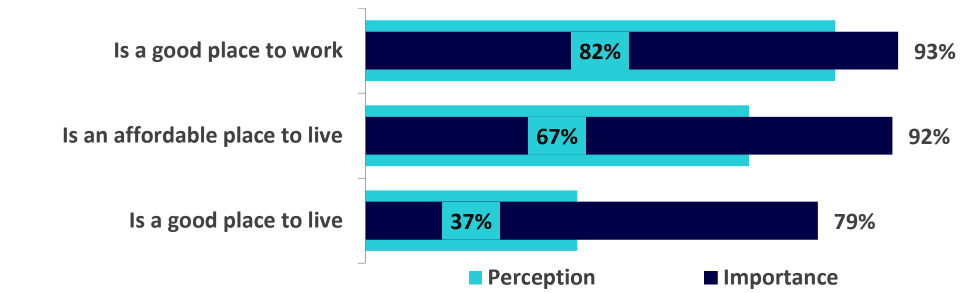


Perception vs. Importance

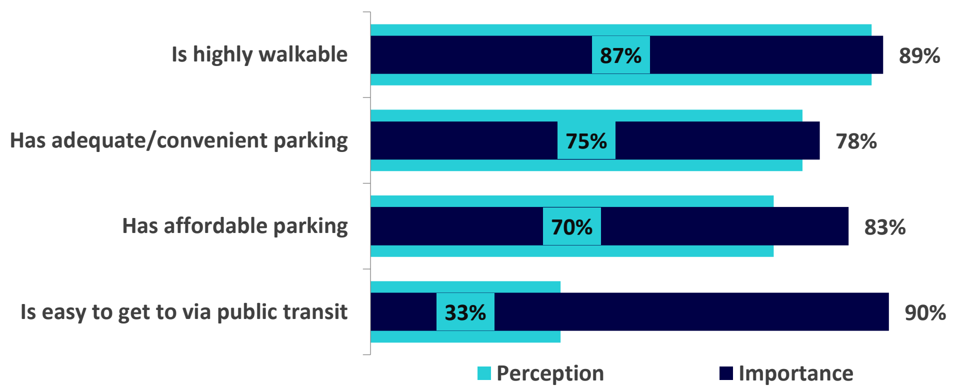
In the first series of questions, respondents are asked how much they agree with a series of statements describing Downtown Saskatoon's attributes (perception). They are then asked how important the attribute is to Downtown (importance).

Q. How important is it that Downtown Saskatoon …?

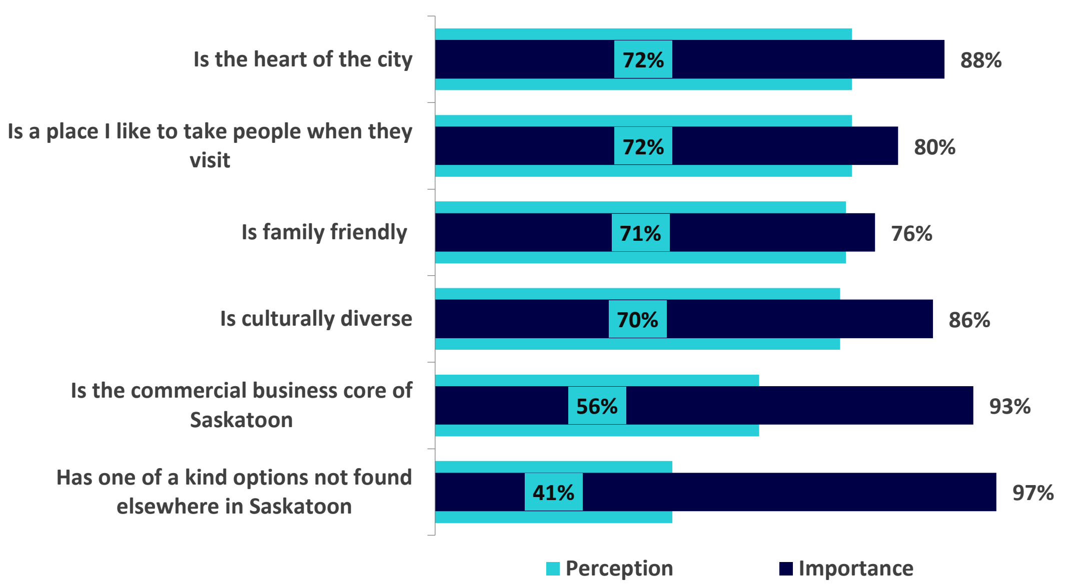
LIVE/WORK



ACCESS



AMBIANCE



General Perceptions - Gap between Perception vs. Importance

The following table summarizes perception of Downtown attributes, importance of the attributes and the gap between perception and importance. Larger gaps highlight areas where general perceptions of Downtown Saskatoon can be improved.

	Perception	Importance	Gap
Is easy to get to via public transit	33%	90%	57%
Has one of a kind options not found elsewhere in Saskatoon	41%	97%	56%
Is a good place to live	37%	79%	42%
Is the commercial business core of Saskatoon	56%	93%	37%
Is an affordable place to live	67%	92%	25%
Is culturally diverse	70%	86%	16%
Is the heart of the city	72%	88%	16%
Has affordable parking	70%	83%	13%
Is a good place to work	82%	93%	11%
Is a place I like to take visitors	72%	80%	8%
Is family friendly	71%	76%	5%
Has adequate/convenient parking	75%	78%	3%
Is highly walkable	87%	89%	2%

Room to Improve Perception of Downtown Transit Access, Uniqueness

- The largest gaps between respondents' perception of Downtown amenities and the importance they place on those amenities relate to transit access, unique offerings, liveability and Downtown as the city's business core.
  - Downtown is **easy to get to via public transit**—33% agree with this statement, but 90% say this is important. The gap of 57 percentage points indicates significant room for improvement in the perception of public transit access to Downtown Saskatoon.
  - There is also a significant gap (57 percentage points) between the perception of Downtown as **having one of a kind options not found elsewhere in Saskatoon** (41% agree) and the perceived importance of such options (97%, virtually all respondents).
  - Over a third (37%) of respondents agree that Downtown is/would be a good place to live—twice as many (79%) say it is important that Downtown **is a good place to live**, a gap of 42 percentage points.
  - Over half (56%) of respondents agree that Downtown **is the commercial business core of Saskatoon**, while the vast majority (93%) think this is important, a gap of 37 percentage points.
  - Two-thirds (67%) agree Downtown would be an affordable place to live/has affordable places to live, compared to 92% who say it is important that Downtown **is an affordable place to live**, a gap of 25 percentage points.

Generally Positive Perception of Downtown Parking

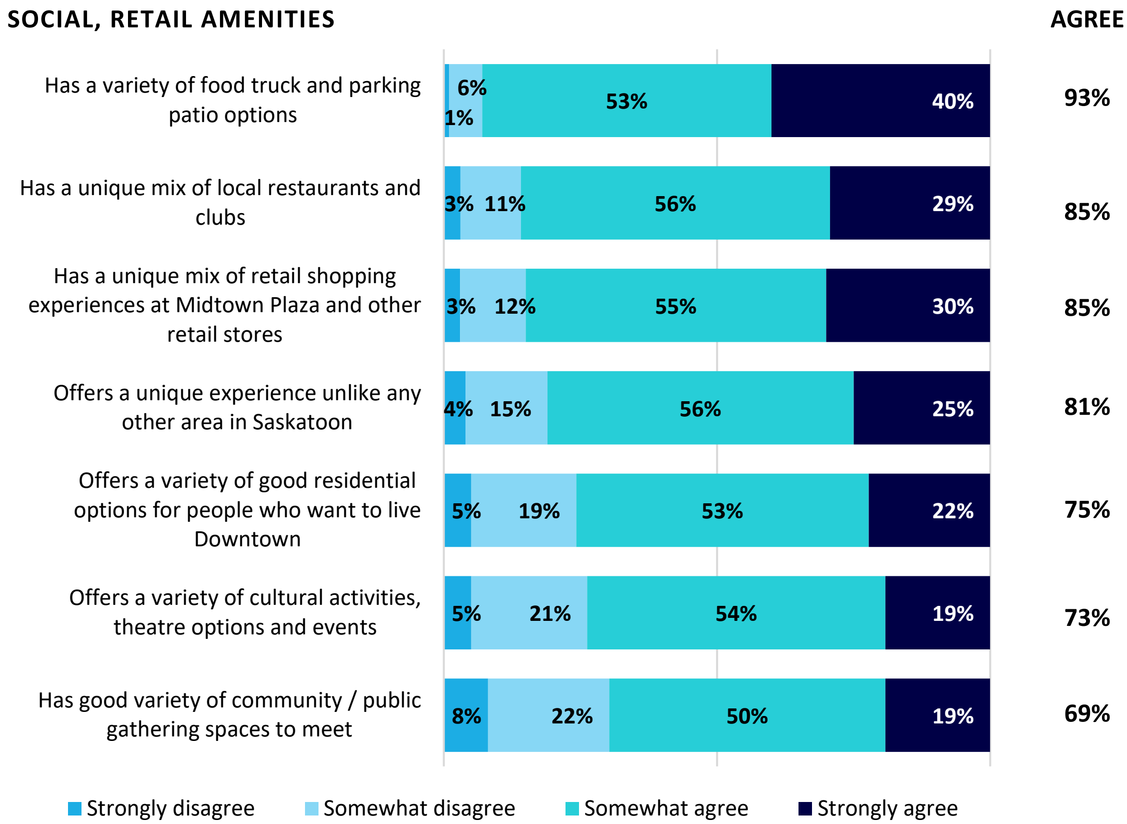
- Smaller gaps between perception and importance suggest that overall public perception of Downtown amenities is positive. Of particular note, respondents appear generally satisfied with parking:
    - 70% agree Downtown has **affordable parking** compared to 83% who think this is important, a gap of 13 percentage points.
    - 75% agree Downtown has **adequate/convenient parking** compared to 78% who think this is important, indicating satisfaction with Downtown parking, a minimal 3-point gap.

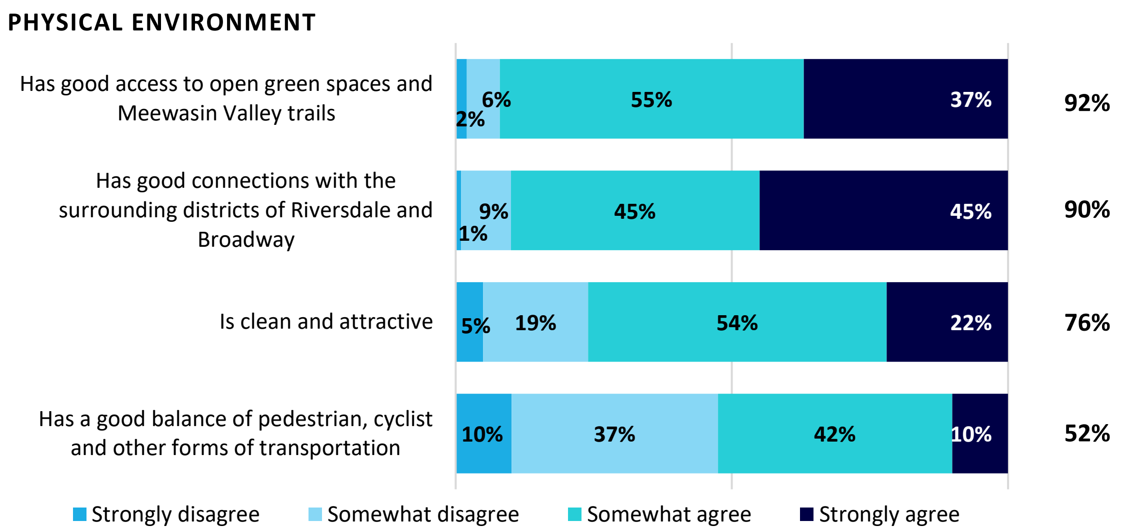
Large Majority Have Positive Perception of Downtown Ambiance

- Comparing perception and importance shows that most respondents have positive perceptions of the ambiance in Downtown Saskatoon:
    - 70% agree Downtown is the **cultural district of Saskatoon** compared to 86% who say this is important to them, a gap of 16 percentage points.
    - 72% agree Downtown is the **heart of the city** compared to 88% who say this is important to them, a 16-point gap.
    - 82% agree Downtown is a **good place to work** compared to 93% who say this is important to them, a 11-point gap.
    - 72% agree Downtown is a **place they like to take people when they visit** compared to 80% who say this is important to them, an 8-point gap.
    - 71% agree Downtown is **family friendly** compared to 76% who say this is important to them, a 5-point gap.
    - 87% agree Downtown is **highly walkable** compared to 89% who say this is important to them, a 2-point gap.

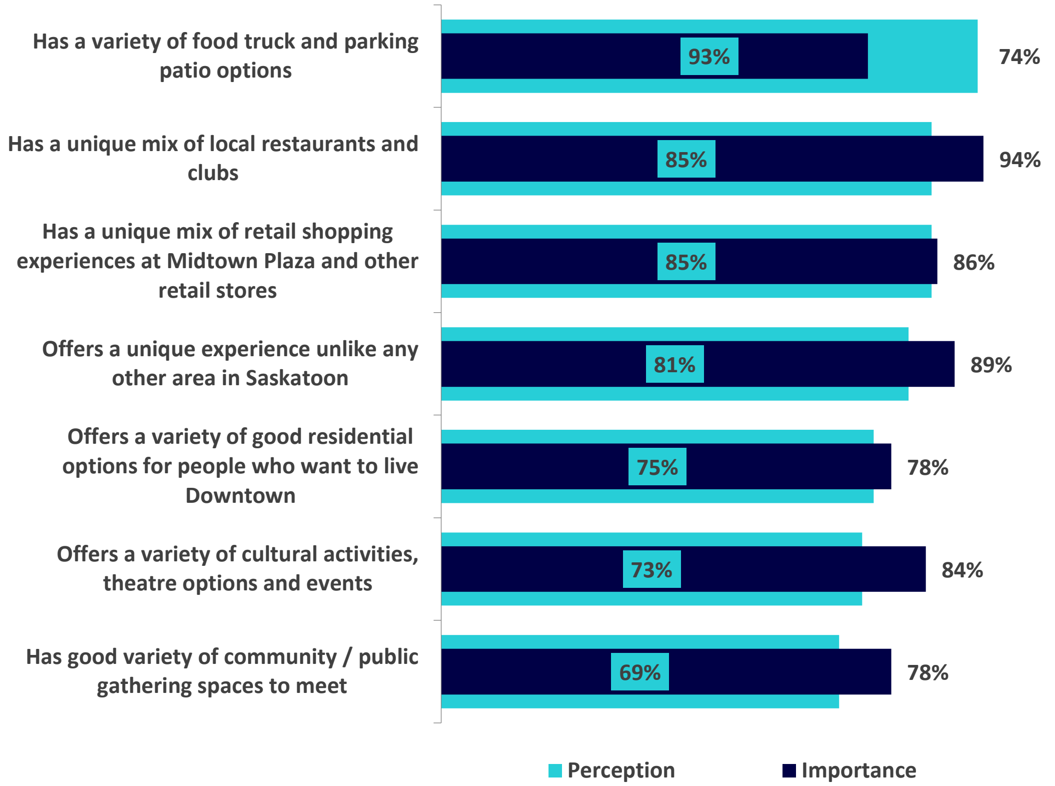
Brand & City Centre Plan

Q. Would you agree or disagree that Downtown Saskatoon … ?

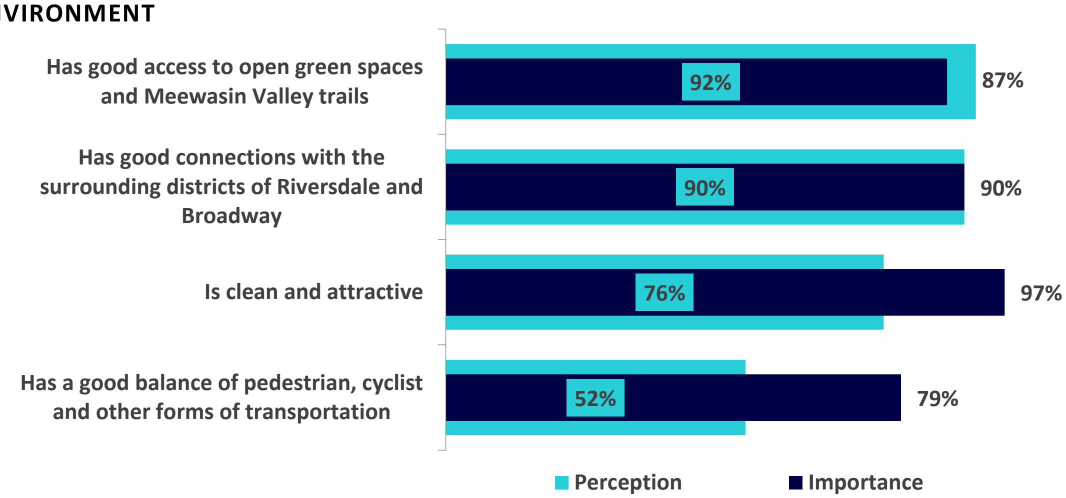




SOCIAL, RETAIL AMENITIES



ENVIRONMENT



Brand & City Centre Plan – Gap between Perception vs. Importance

The following table summarizes perception of Downtown attributes, importance of the attributes and the gap between perception and importance. Larger gaps highlight areas where perception of Downtown's brand and city centre plan can be improved.

	Perception	Importance	Gap
Has a good balance of pedestrian, cyclist and other forms of transportation	**52%**	**79%**	**27%**
Is clean and attractive	**76%**	**97%**	**21%**
Offers a variety of cultural activities, theatre options and events	**73%**	**84%**	**11%**
Has good variety of community / public gathering spaces to meet	**69%**	**78%**	**9%**
Has a unique mix of local restaurants and clubs	**85%**	**94%**	**9%**
Offers a unique experience unlike any other area in Saskatoon	**81%**	**89%**	**8%**
Offers a variety of good residential options for people who want to live Downtown	**75%**	**78%**	**3%**
Has a unique mix of retail shopping experiences at Midtown Plaza and other retail stores	**85%**	**86%**	**1%**
Has good connections with the surrounding districts of Riversdale and Broadway	**90%**	**90%**	**0%**
Has good access to open green spaces and Meewasin Valley trails	**92%**	**87%**	**-5%**
Has a variety of food truck and parking patio options	**93%**	**74%**	**-19%**

Room to Improve Perception of Downtown Transit Options & Cleanliness

- The gap between perception and importance suggests there is room to improve public perception of Downtown transportation options as well as its visual attractiveness.
  - Approximately half (52%) of respondents agree that Downtown has a **good balance of pedestrian, cyclist and other forms of transportation**. Over three-quarters (79%) think a balance of transportation options is important, a gap of 27 percentage points.
  - While three-quarters (76%) agree Downtown **is clean and attractive**, 97% (virtually all respondents) think this is important, a gap of 21 percentage points.

Majority Have Positive Perceptions of Downtown Social and Retail Amenities

- The large majority of respondents have positive perceptions of Downtown's social and retail amenities.
  - Seven out of ten (73%) agree Downtown offers a variety of cultural activities, theatre options and events, compared to 84% who think this is important, an 11-point gap.
  - Seven out of ten (69%) agree Downtown has good variety of community / public gathering spaces, compared to 78% who think this is important, a 9-point gap.
  - Eight out of ten (85%) agree Downtown has a unique mix of local restaurants and clubs, while 94% think this is important, a 9-point gap.

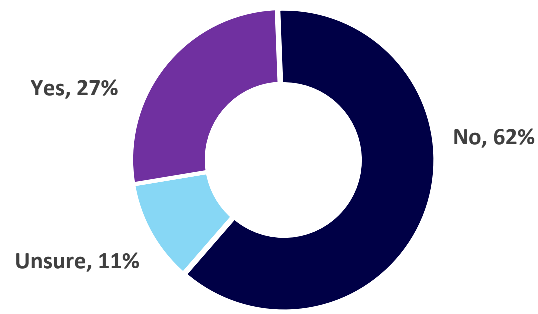
- Eight out of ten (81%) agree Downtown offers a unique experience unlike any other area in Saskatoon, while 89% think this is important, an 8-point gap.
- Seven out of ten (75%) agree Downtown offers a variety of good residential options for people who want to live Downtown, compared to 78% who think this is important, a minimal 3-point gap
- Eight out of ten (85%) agree Downtown has a unique mix of retail shopping experiences at Midtown Plaza and other retail stores, essentially the same percentage (86%) who think this is important.
- Nine out of ten 90% agree Downtown has good connections with the surrounding districts of Riversdale and Broadway, and nine out of ten (90%) think this is important.

Downtown Surpassing Expectations in Green Space, Food Trucks & Parking Patios

- Downtown is surpassing expectations in two areas:
  - Nine out of ten (92%) agree Downtown has good access to open green spaces and Meewasin Valley trails compared to 87% who think this is important. The minus 5 percentage point gap between perception and importance indicates that Downtown is seen as performing well in this area.
  - Nine out of then (93%) agree Downtown has a variety of food truck and parking patio options compared to 74% who think this is important. Again, a gap of minus 19 percentage points shows that Downtown is seen as performing very well in this area.

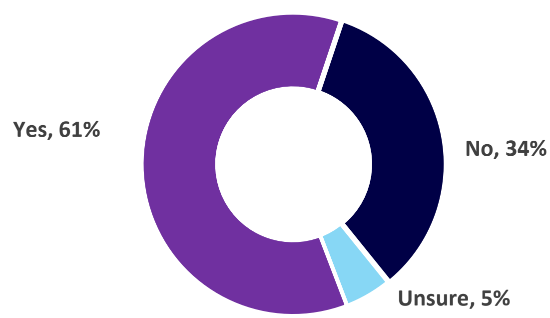
Website

Q. Downtown Saskatoon has a website that includes a list of downtown businesses as well as information about events, restaurants, shopping and cultural activities. Are you aware of this website?



- More than a quarter (27%) of respondents are aware of the Downtown Saskatoon website.

Q. In the last year or so, have you looked on the Downtown Saskatoon website for information about events, restaurants, shopping or other activities?



- Of those respondents who are aware of the Downtown website, 61% (or 17% of all respondents) have visited the DTN YXE site in the last year for information on events, restaurants, shopping, etc.
- Young respondents (ages 18-24) are somewhat more aware of Downtown Saskatoon's website than older respondents, but much more likely to have visited the site in the last year. Women are also more likely than men to have visited in the last year.

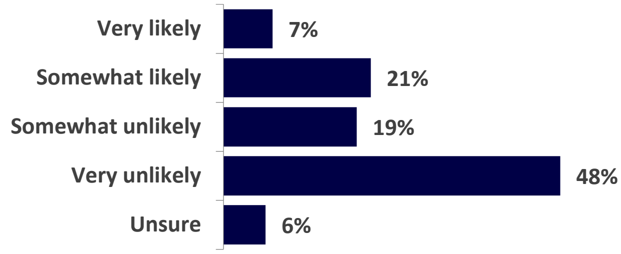
Ages 18-24, Women Most Likely DTNYXE Website Visitors

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Aware of DTN YXE website	32%	30%	26%	31%	23%	26%	27%	27%	27%
Visited DTN YXE in last year	92%	68%	61%	57%	64%	36%	53%	67%	61%

Living Downtown

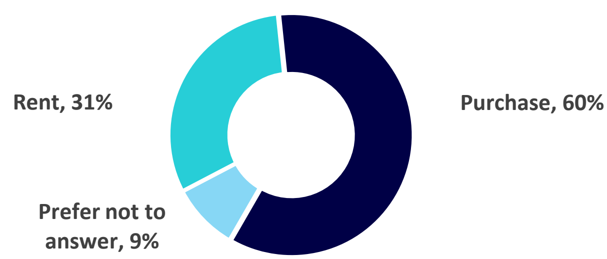
Questions in this section are asked of only of respondents not currently living Downtown.

Q. How likely would you be to consider living Downtown at some point?



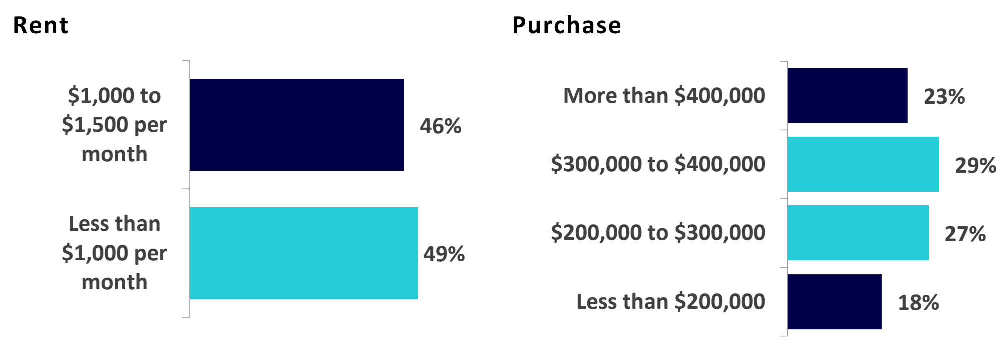
- Approximately 28% of respondents not currently residing Downtown would consider living there at some point. This drops to 17% of those who live just outside the city vs. 26% who live within the city. The likelihood of considering living Downtown declines with age, from 48% of ages 18-24 to 19% of ages 65+.

Q. Would you prefer to rent or purchase your residence?



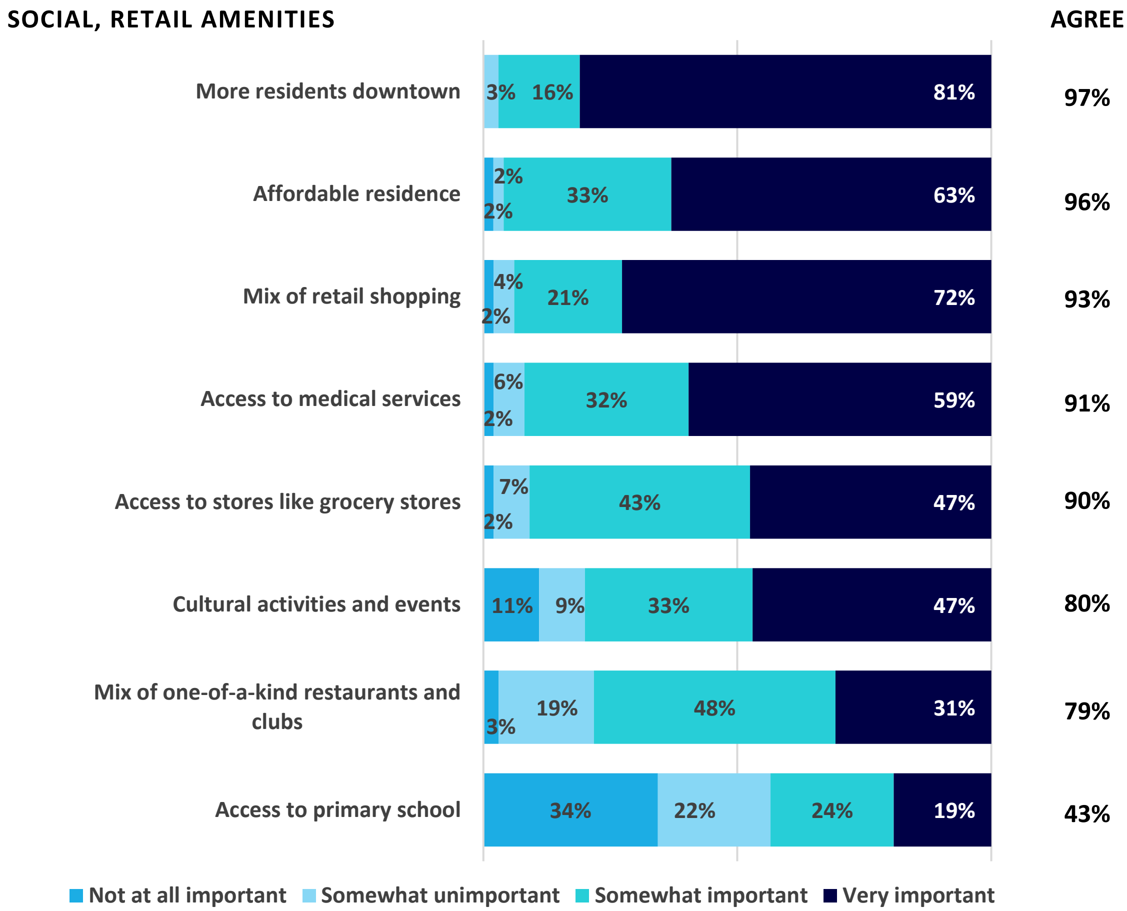
- Of the 28% who would consider living Downtown, most (60%) say they would prefer to purchase a residence compared to 31% who would prefer to rent. This is reversed for ages 18-24 (61% prefer to rent). The preference to buy is highest among ages 35-64.

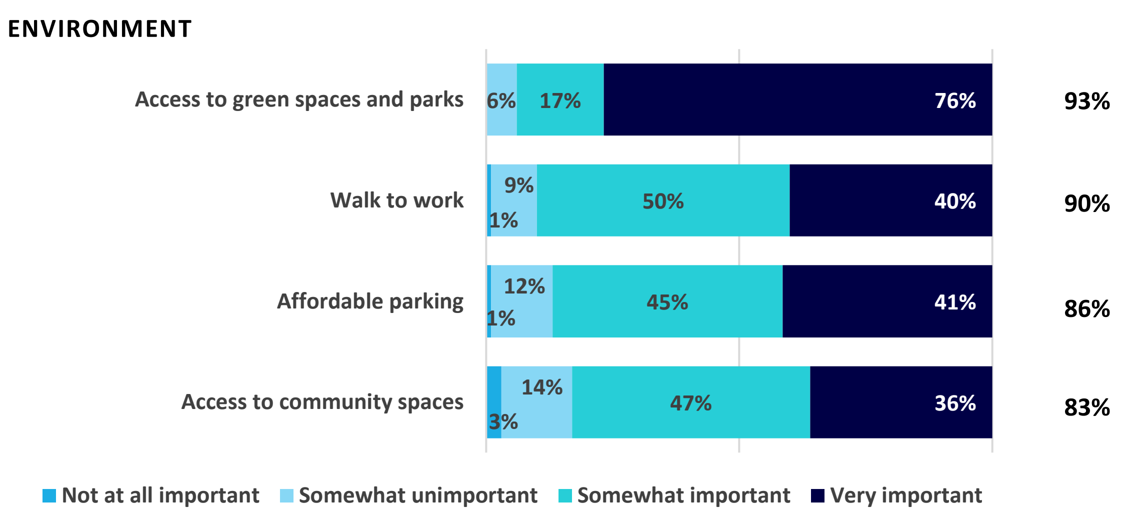
Q. If you prefer to rent/purchase, what price range would be of most interest to you?



- Half of those who prefer to rent would pay $1,000–$1,500/month, half less than $1,000/month.
- Those interested in purchasing are divided: 23% would pay more than $400,000; 29% between $300,000–$400,000; and 27% between $200,000–$300,000.

Q. How important would each of the following be for you to consider living in Downtown Saskatoon?





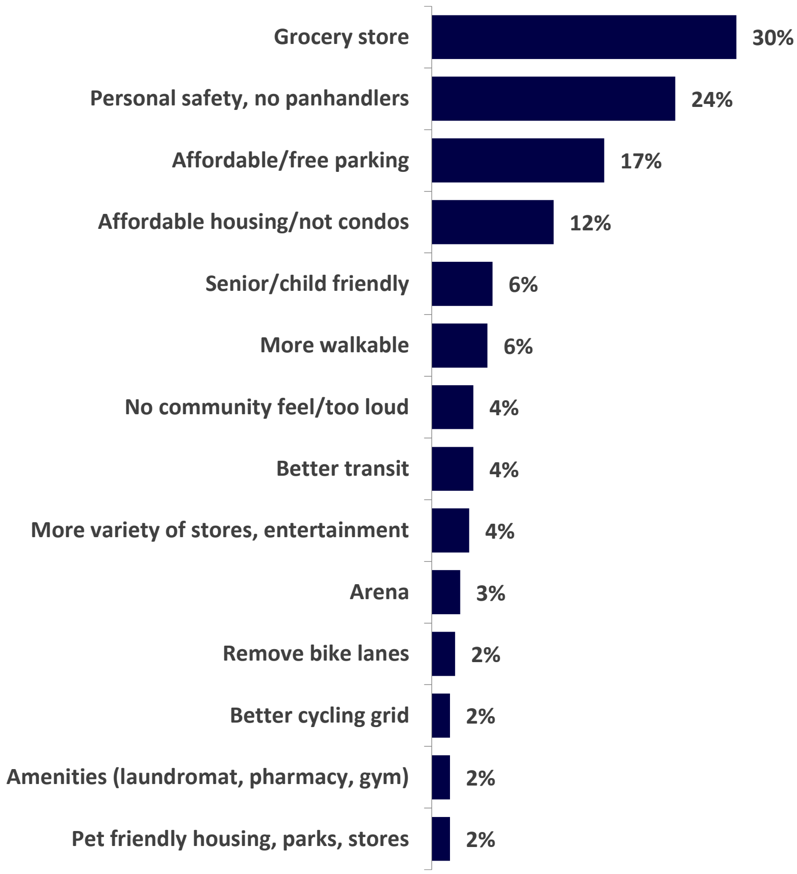
Social, Retail Amenities Key to Considering Living Downtown

- Respondents were asked how important a series of amenities would be to them in considering living Downtown. With the exception of access to primary school, the large majority found every amenity important:
  - Nearly all respondents (97%) say more residents downtown is an important consideration—including the large majority (81%) who say it is a 'very important'
  - Nearly all respondents (96%) say more affordable residence is an important consideration, with 63% saying this is a 'very important'
  - Nine out of ten (91%) say access to medical services is an important consideration, 59% deem this 'very important'
  - Nine out of ten (90%) say access to grocery stores is important, 47% say this is 'very important'
  - Eight out of ten (80%) say cultural activities and events are important, 47% 'very important'
  - Eight out of ten (79%) say a mix of one-of-a-kind restaurants and clubs is important, 31% 'very important'
  - Four out of ten (43%) say access to primary school is important, 19% 'very important'

Physical Environment Plays Important Role

- The physical amenities available Downtown are also important to people in considering living Downtown:
  - Nine out of ten (93%) respondents say access to green spaces and parks is an important consideration in considering living Downtown, including seven out of ten (76%) who say this is 'very important'
  - Nine out of ten (90%) say being able to walk to work is important, with four out of ten (40%) citing this as 'very important'
  - Eight out of ten (86%) say affordable parking is important, with four out of ten (41%) citing it as 'very important'
  - Finally, eight out of ten (83%) say access to community spaces is important, with three out of ten (36%) citing it as 'very important'

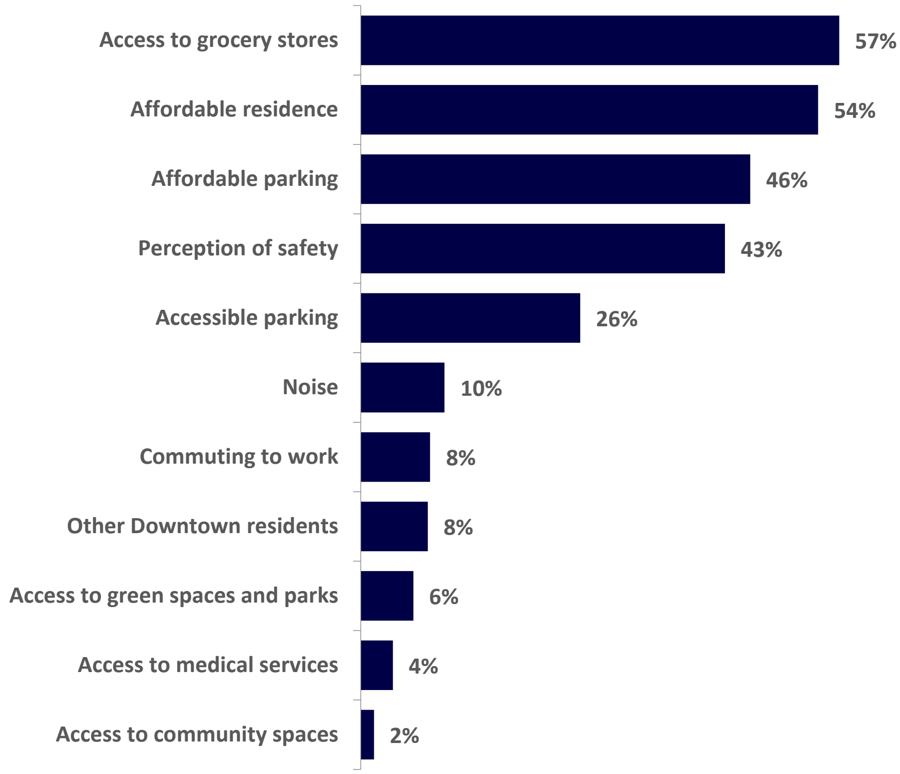
Q. Is there anything else that is missing from Downtown Saskatoon that would make it more likely for you to consider residing there?



**Multiple response allowed.*

- Respondents list of variety of things they feel are currently missing from Downtown that would make it more likely for them to consider living there. Topping the list are a grocery store (mentioned by 30%), personal safety/no panhandlers (24%), affordable/free parking (17%) and affordable housing/not condos (12%).

Q. What are the three biggest barriers that prevent you from considering living in Downtown Saskatoon?

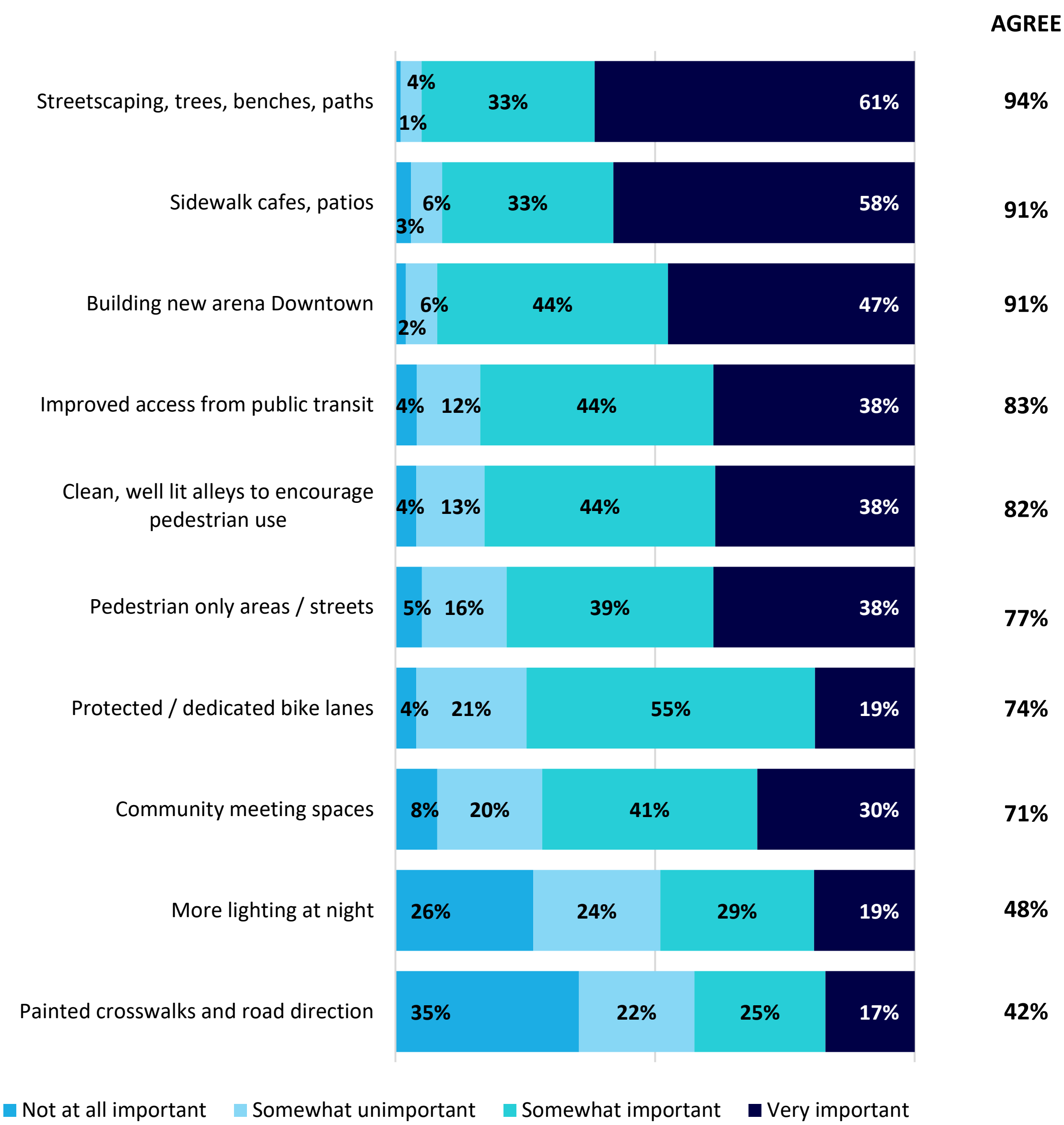


**Multiple response allowed.*

- More than half of respondents not currently living Downtown cite access to grocery stores (57%) and affordable residences (54%) as barriers to considering living Downtown.
- Approximately 46% cite affordable parking as a barrier and 26% cite accessible parking.
- Approximately 43% cite perception of safety or not feeling safe.
- Other perceived barriers include noise (10%), commuting to work (8%), other Downtown residents (8%), access to green spaces and parks (6%), access to medial services (4%) and access to community spaces (2%).

Improvements

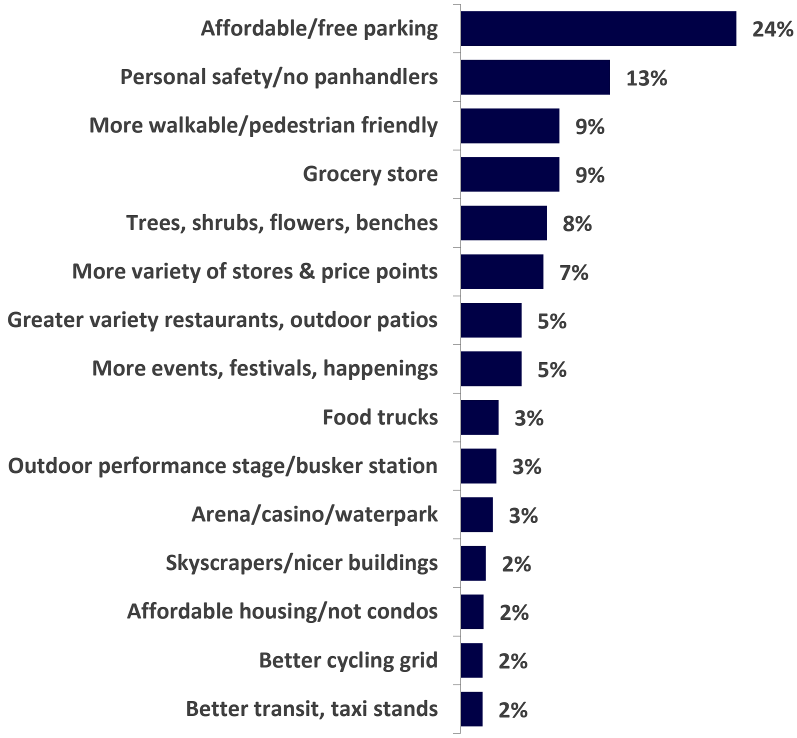
Q. How important is each of the following elements for you in terms of increasing the attractiveness and accessibility of Downtown Saskatoon?



Various Amenities Seen as Increasing Downtown Attractiveness, Accessibility

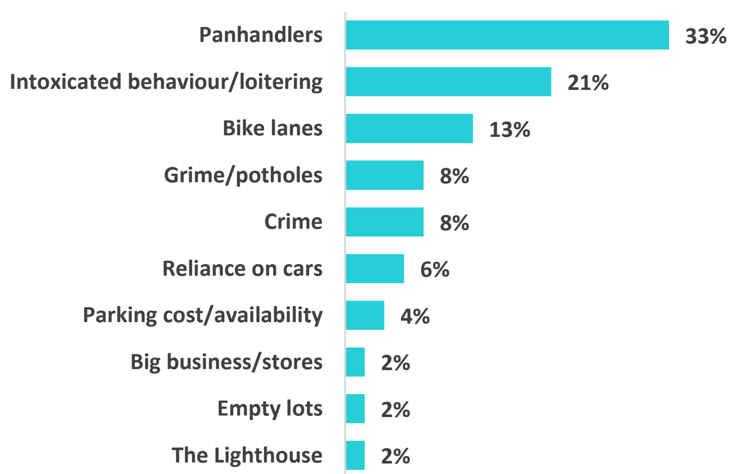
- When asked how important a series of amenities would be to increasing the attractiveness and accessibility of Downtown Saskatoon, the majority of respondents ticked every box. Leading the way were:
  - **streetscaping, trees, benches, paths** – 94% of respondents think these are important, including 61% who think they are 'very important'
  - **sidewalk cafes, patios** – 91% think these are important, including 58% who think they are 'very important'
  - **building new arena Downtown** – 91% think this is important (47% 'very important')
  - **improved access from public transit** – 83% think this is important (38% 'very important')
  - **clean, well lit alleys to encourage pedestrian use** – 82% think this is important (38% 'very important').
- Seven out of ten respondents also place importance on:
  - **pedestrian only areas / streets** – 77% of respondents think this is important (38% 'very important')
  - **protected / dedicated bike lanes** – 74% think this is important (19% 'very important')
  - **community meeting spaces** – 71% think this is important (30% 'very important')
- Just under half of respondents think it is important for Downtown to add:
  - **more lighting at night** – 48% of respondents think this is important (19% 'very important')
  - **painted crosswalks and road direction** – 42% think this is important (17% 'very important')

Q. What would you like to see more of in Downtown Saskatoon?



- Respondents cite a variety of things they would like to see more of in Downtown Saskatoon. The most frequently cited are affordable/free parking (24%), personal safety/no panhandlers (13%), more walkable/pedestrian friendly (9%), grocery store (9%), trees/shrubs/flowers/benches (8%) and more variety of stores/price points (7%).

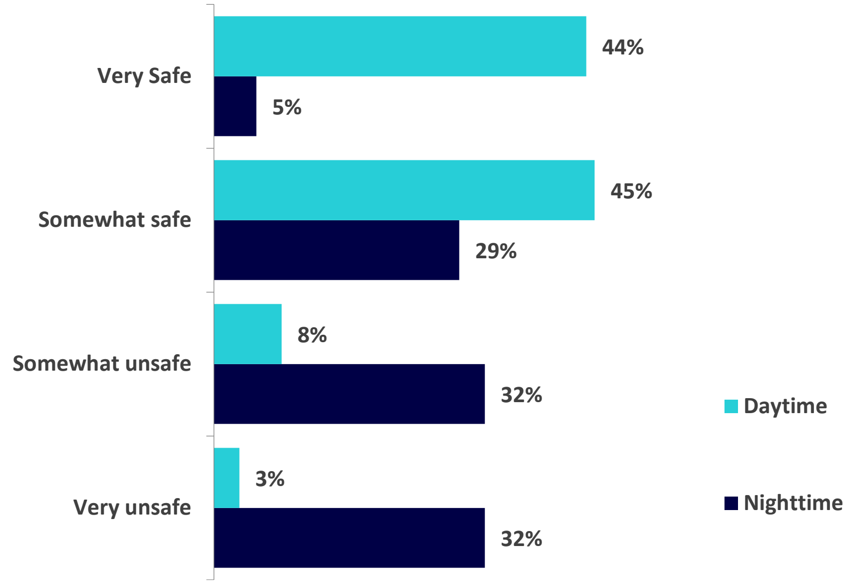
Q. What would you like to see less of?



- A third (33%) of respondents would like to see less panhandlers, 21% less intoxicated behaviour/loitering, 13% less bike lanes, 8% less grime/potholes and 8% less crim.

Perception of Safety

*Q. How safe do you feel walking or cycling in Downtown Saskatoon in the **daytime**? In the **nighttime**?*[3]



- The large majority (89%) of respondents feel safe walking or cycling in Downtown Saskatoon during the daytime, including 44% who feel 'very safe'.
- In contrast, roughly a third (34%) of respondents feel safe walking or cycling Downtown during the nighttime, with 5% feeling 'very safe'.
- Women tend to feel less safe walking or cycling Downtown, at 80% vs. 86% of men during the day and 23% vs. 42% of men at night.

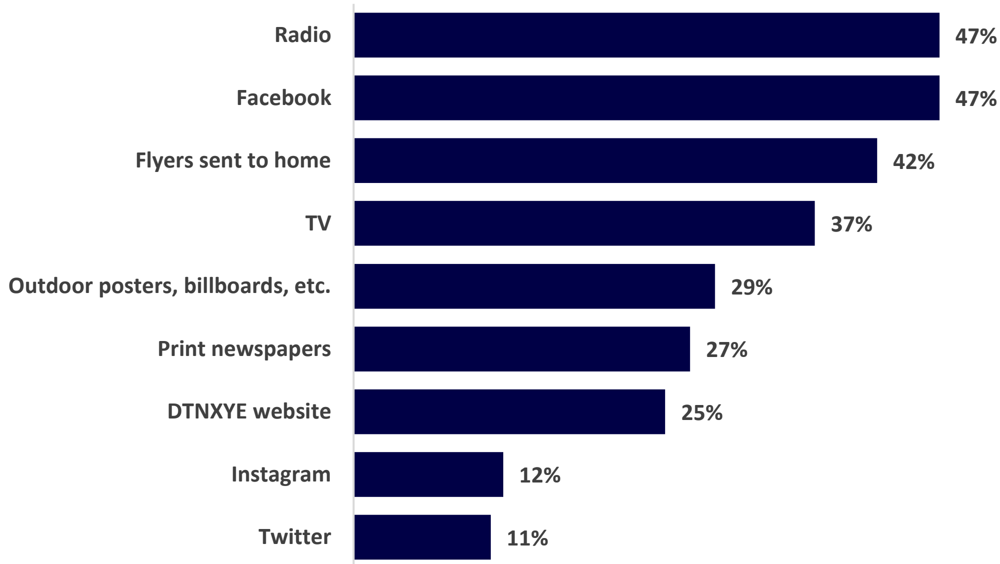
Feel safe walking or cycling Downtown in the …	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Daytime	82%	81%	88%	77%	86%	82%	86%	80%	89%
Nighttime	26%	30%	31%	40%	32%	29%	42%	23%	34%

[3] For tracking purposes, the wording of this safety perception question is duplicated from the City of Saskatoon's Street Activity Survey done in 2011, 2013 and 2015.

The findings from the 2017 DTN YXE survey are consistent with findings in the City of Saskatoon's 2015 Street Activity survey, which found that 89% of residents felt safe (44% somewhat safe, 45% very safe) walking or cycling in Downtown Saskatoon during the daytime and 37% felt safe (30% somewhat safe, 7% very safe) during the nighttime.

Communication

Q. Which are the best ways of informing you about new stores, upcoming sales events or promotional events at Midtown Plaza?



**Multiple response allowed.*

- Overall, respondents want to hear about new stores, upcoming sales and promotional events at Midtown Plaza through multiple media channels.
    - Radio and Facebook are tied for the most frequently mentioned channel, at 47% of respondents each.
    - Traditional media channels follow: flyers sent to the home (42%), television (37%), outdoor posters, billboards, buses and benches (29%) and print newspapers (27%).
    - Social media is also key: 25% say the DTN YXE website is the best way to inform them, 12% say Instagram and 11% say Twitter.

Social Media Growth, Traditional Media Still in Play

- Drilling down into survey results by gender and age confirms that social media has become a key channel for communicating information about the Midtown Plaza—particularly among the younger demographic. But results also show that traditional media channels remain a popular information source across age and gender groups.
    - Younger respondents (ages 18-44) are most likely to name Facebook as the best way to communicate with them about the Midtown Plaza, but Facebook is also a preferred channel for roughly a quarter of older respondents ages 55+. It is also a more popular choice among women.
    - Instagram and Twitter are popular communication channels among ages 18-34, but appear to decline after age 35. Women seem to prefer Instagram, while men favour Twitter.

- Radio is a popular communication channel across age and gender groups.
- The preference for communicating about Midtown Plaza via flyers sent to the home, television and print newspapers increases with age. Men are somewhat more likely to prefer these traditional channels than women.
- The preference for outdoor media (posters, billboards, buses, benches, etc.) decreases with age, from nearly half of ages 18-24 to a fifth of ages 55+.
- The Downtown Saskatoon website is a preferred channel for Midtown Plaza news for roughly a fifth to a quarter of respondents across gender and age groups, with a spike to 37% of ages 55-64.

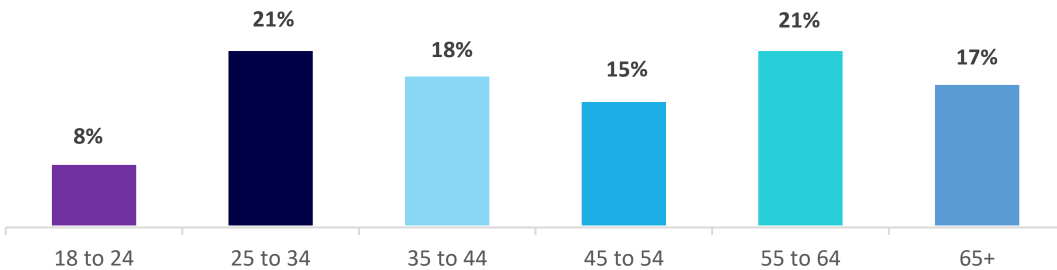
18-35s Use Multiple Communication Channels

	Age Group						Gender		Overall
	18-24	25-34	35-44	45-54	55-64	65+	M	F	
Radio	53%	39%	44%	48%	60%	39%	46%	48%	47%
Facebook	53%	73%	66%	39%	27%	24%	35%	56%	47%
Flyers sent to home	21%	30%	28%	41%	51%	71%	44%	40%	42%
TV	21%	19%	29%	45%	48%	50%	44%	31%	37%
Outdoor posters, billboards, etc.	45%	34%	33%	32%	20%	21%	29%	29%	29%
Print newspapers	5%	18%	17%	20%	34%	54%	34%	21%	27%
DTN YXE website	24%	20%	21%	24%	37%	21%	25%	26%	25%
Instagram	32%	31%	9%	7%	2%	2%	9%	15%	12%
Twitter	26%	17%	11%	13%	4%	4%	15%	8%	11%

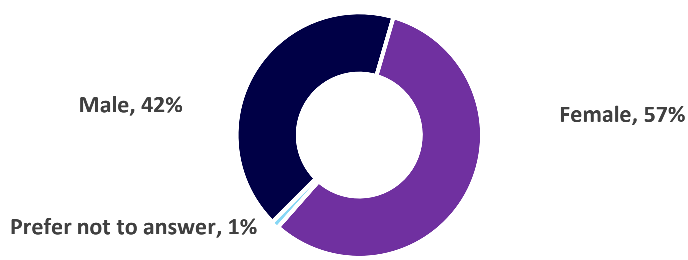
Appendix

Demographics

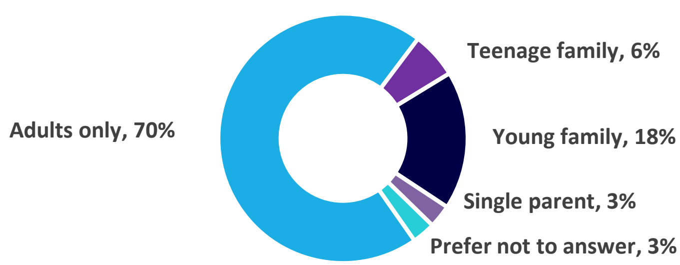
Age



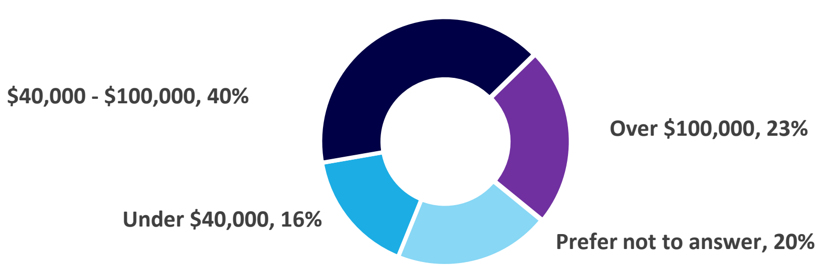
Gender



Type of Household



Household Income



Survey Questionnaire

INTRODUCTION

We are conducting this survey with Saskatoon and area residents to better understand current attitudes and perceptions of Saskatoon's Downtown district.

Q1. Which of the following applies to you? **(SELECT ONE RESPONSE)**

a) I live in downtown Saskatoon
b) I live in Saskatoon but not in the Downtown area → **SKIP to Q2**
c) I live just outside of Saskatoon (Warman, Martensville, Dalmeny, etc.) → **SKIP to Q2**
d) Other **(END)**

Q2. Do you work downtown?

a) Yes
b) No

SECTION A: VISITATION

Q3. When was the last time you visited Downtown Saskatoon for non-work reasons outside of your work hours?

a) Within the last week
b) More than a week ago, but within the past month
c) More than a month ago, but within the past 3 months
d) More than 3 months ago, but within the past 6 months
e) More than 6 months ago, but within the past year
f) More than a year ago → **SKIP to Q6**

Q4. In the last 12 months, what are all the non-work reasons why you have visited downtown Saskatoon? **(SELECT AS MANY AS APPLY)**

1. Shopping
2. Events
3. Restaurants/Bars/Clubs
4. Live music events/theatre/arts events
5. Festival/parades
6. Museums/galleries
7. Parks/outdoor activities/walks/runs
8. Seasonal holiday entertainment and events
9. Charitable events/volunteer activities
10. Visiting a downtown resident
11. Library/education events
12. Government services (City Hall, Court House, Registry etc.)
13. Professional services (medical appointment, legal services, accounting etc.)
14. Non work-related meetings/seminars
15. Other **(PLEASE DESCRIBE)**

Q4a. What was the non-work reason(s) for your most recent visit to Downtown Saskatoon? **(SELECT AS MANY AS APPLY)**

1) Shopping
2) Events
3) Restaurants/Bars/Clubs

4) Live music events/theatre/arts events
5) Festival/parades
6) Museums/galleries
7) Parks/outdoor activities/walks/runs
8) Seasonal holiday entertainment and events
9) Charitable events/volunteer activities
10) Visiting a downtown resident
11) Library/education events
12) Government services (City Hall, Court House, Registry etc.)
13) Professional services (medical appointment, legal services, accounting etc.)
14) Non work related meetings/seminars
15) Other **(PLEASE DESCRIBE)**

Q5. When you visited Downtown for non-work reasons, how did you get there?

a) Car
b) Walk
c) Bus/Transit
d) Bike
e) Car Pool
f) Other **(PLEASE DESCRIBE)**

Q5a. On your most recent visit to Downtown Saskatoon, how did you get there?

a) Car
b) Walk
c) Bus/Transit
d) Bike
e) Car Pool
f) Other **(PLEASE DESCRIBE)**

Q6. Have you attended any of the following events in downtown Saskatoon in the past year? **(SELECT ALL THAT APPLY)**

a) Firework Festival
b) SaskTel Saskatchewan Jazz Festival
c) Saskatoon Pride Festival
d) Winter Shines
e) Meewasin Skating Rink
f) 2nd Avenue Sidewalk Sale
g) Farmers Market
h) Folk Festival
i) Potash Corp Children's Festival
j) Rock the River
k) Shakespeare on the Saskatchewan
l) Taste of Saskatchewan
m) Rock 102 Show and Shine
n) Other **(PLEASE DESCRIBE)**

SECTION B: IMPRESSION & LIKLIHOOD TO RECOMMEND

Q8. Overall, what is your impression of Downtown Saskatoon?

a) Extremely positive
b) Positive

c) Neutral
d) Negative
e) Extremely negative

Q9. How likely would you be to recommend to friends and visitors that they visit downtown Saskatoon on a scale of 0 to 10, where 0 is not at all, and 10 is extremely likely?

SECTION C: PERCEPTIONS

General Perceptions

Q10. Would you agree or disagree that Downtown Saskatoon has affordable parking . . .?

a) Strongly agree
b) Somewhat agree
c) Somewhat disagree
d) Strongly disagree

11) Has adequate / convenient parking?
12) Is family friendly?
13) Would be an affordable place to live / has affordable places to live?
14) Is highly walkable?
15) Is or would be a good place to live?
16) Is or would be a good place to work?
17) Has improved over the last 3 years or so?
18) Has one of a kind options that cannot be found elsewhere in Saskatoon?
19) Is a place I like to take people when they visit me?
20) Is easy to get to via public transit?
21) Is the commercial business core of Saskatoon?
22) Is the cultural district of Saskatoon?
23) Is the heart of the city?

Brand and City Centre Plan

Q24. Would you agree or disagree that Downtown Saskatoon offers a unique experience unlike any other area in Saskatoon . . . ?

a) Strongly agree
b) Somewhat agree
c) Somewhat disagree
d) Strongly disagree

25) Has a unique mix of local restaurants and clubs?
26) Has a unique mix of retail shopping experiences at Midtown Plaza and other retail stores?
27) Offers a variety of cultural activities, theatre options and events?
28) Has good access to open green spaces and Meewasin Valley trails?
29) Has a variety of food truck and parking patio options?
30) Is clean and attractive?
31) Has a good balance of pedestrian, cyclist and other forms of transportation?
32) Has good variety of community / public gathering spaces to meet?
33) Has good connections with the surrounding districts of Riversdale and Broadway?
34) Offers a variety of good residential options for people who want to live Downtown?

Q35. How important is it that Downtown Saskatoon has affordable parking . . . ?

a) Very important
b) Somewhat important
c) Somewhat unimportant

d) Not at all important

35) Has adequate/convenient parking?
36) Is family friendly?
37) Is an affordable place to live?
38) Is highly walkable?
39) Is a good place to live?
40) Is a good place to work?
41) Has one of a kind options that cannot be found elsewhere in Saskatoon?
42) Is easy to get to via public transit?
43) Is the commercial business core of Saskatoon?
44) Is culturally diverse?
45) Has a unique mix of local restaurants and clubs?
46) Has a unique mix of retail shopping experiences at Midtown plaza and other retail stores?
47) Offers a variety of cultural activities, theatre options and events?
48) Has good access to open green spaces and Meewasin Valley trails?
49) Has a variety of food truck and parking patio options?
50) Is clean and attractive?
51) Has a good balance of pedestrian, cyclist and other forms of transportation?
52) Has good variety of community / public gathering spaces to meet?
53) Has good connections with the surrounding districts of Riversdale and Broadway?
54) Offers a variety of good residential options for people who want to live Downtown?

Website

Q35. Downtown Saskatoon has a website that includes a list of downtown businesses as well as information about events, restaurants, shopping and cultural activities. Are you aware of this website?

a) Yes
b) No
c) Unsure

Q36. In the last year or so, have you looked on the Downtown Saskatoon website for information about events restaurants, shopping or other activities?

a) Yes
b) No
c) Unsure

Living Downtown

Q37. **(FOR RESPONDENTS THAT DO NOT CURRENTLY RESIDE DOWNTOWN SASKATOON)** How likely would you be to consider living Downtown at some point?

a) Very likely
b) Somewhat likely
c) Somewhat unlikely
d) Very unlikely
e) Unsure

Q37a. If you were considering living Downtown, would you prefer to rent or purchase your residence?

a) Rent
b) Purchase
c) Prefer not to answer

Q37b. **(FOR RESPONDENTS WHO PREFER TO RENT)** If you prefer to rent, what price range would be of most interest to you?

a) Less than $1,000 per month
b) Between $1,000 and $1,500 per month
c) Prefer not to answer

Q37b. **(FOR RESPONDENTS WHO PREFER TO PURCHASE)** If you prefer to purchase, what price range would be of most interest to you?

a) Less than $200,000
b) Between $200,000 and $300,000
c) Between $300,000 and $400,000
d) Between $400,000 and $500,000
e) More than $500,000
f) Prefer not to answer

Q38. **(FOR RESPONDENTS THAT DO NOT CURRENTLY RESIDE DOWNTOWN SASKATOON)** How important would each of the following be, for you to consider living in Downtown Saskatoon?

a) Affordable residence
   1) Very important
   2) Somewhat important
   3) Somewhat unimportant
   4) Not at all important
b) More residents downtown
c) Walk to work
d) Mix of one-of-a-kind restaurants and clubs
e) Mix of retail shopping
f) Cultural activities and events
g) Access to stores like grocery stores
h) Access to medical services
i) Access to primary school
j) Access to community spaces
k) Access to green spaces and parks

Q50. **(FOR RESPONDENTS THAT DO NOT CURRENTLY RESIDE DOWNTOWN SASKATOON)** Is there anything else that is missing from Downtown Saskatoon that would make it more likely for you to consider residing there? **(PLEASE DESCRIBE)**

Q51. **(FOR RESPONDENTS THAT DO NOT CURRENTLY RESIDE DOWNTOWN SASKATOON)** What are the three biggest barriers that prevent you from considering living in Downtown Saskatoon? **(PROVIDE TOP 3 RATING OPTIONS)**

1) Affordable residence
2) Affordable parking
3) Commuting to work
4) Other downtown residents
5) Noise
6) Perception that it's not safe
7) Access to community spaces
8) Access to green spaces and parks
9) Accessible parking
10) Access to grocery stores

11) Access to primary schools
12) Access to medical services
13) Something else **(PLEASE DESCRIBE)**

Improvements

Q59. How important is each of the following for you in terms of increasing the attractiveness and accessibility of Downtown Saskatoon?

a) More lighting at night
   1) Very important
   2) Somewhat important
   3) Somewhat unimportant
   4) Not at all important

b) Community meeting spaces
c) Protected / dedicated bike lanes
d) Pedestrian only areas / streets
e) Clean, well lit alleys to encourage pedestrian use
f) Improved access from public transit
g) Streetscaping, trees, benches, paths
h) Building new arena Downtown
i) Sidewalk cafes, patios
j) Painted crosswalks and road direction
k) Is there anything else that is missing from Downtown Saskatoon? **(PLEASE DESCRIBE)**

71. What would you like to see more of in Downtown Saskatoon?
____

72. What would you like to see less of?
____

73a. How safe do you feel walking or cycling in Downtown Saskatoon in the daytime?
a) Very safe
b) Somewhat safe
c) Somewhat unsafe
d) Very unsafe

73b. How safe do you feel walking or cycling in Downtown Saskatoon in the nighttime?
a) Very safe
b) Somewhat safe
c) Somewhat unsafe
d) Very unsafe

Communications

74. Which are the best ways of informing you about new stores, upcoming sales events or promotional events at Midtown Plaza?
1) Downtown Saskatoon Website
2) Facebook
3) Twitter
4) Instagram
5) Outdoor posters (billboards, buses, benches etc.)

6) Print newspapers
7) Flyers sent to home
8) Radio
9) TV
10) Other **(PLEASE DESCRIBE)**

SECTION D: DEMOGRAPHICS

D1. Select the category in which your age falls.

a) 18 to 24
b) 25 to 34
c) 35 to 44
d) 45 to 54
e) 55 to 64
f) 65 or older
g) Prefer not to answer

D2. Gender?

a) Female
b) Male
c) Prefer not to answer

D3. Which best describes your household?

a) Adults only
b) Teenage family
c) Young family
d) Single parent
e) Prefer not to answer

D4. What is your annual household income range?

a) Under $40,000
b) $40,000-$100,000
c) Over $100,000
d) Prefer not to answer

D4. What is your postal code **(OPEN END)**

This is the end of our survey. Your input is appreciated and helpful for the planning of Downtown Saskatoon. ***Thank you very much!***