

OUR CITY. OUR FUTURE.



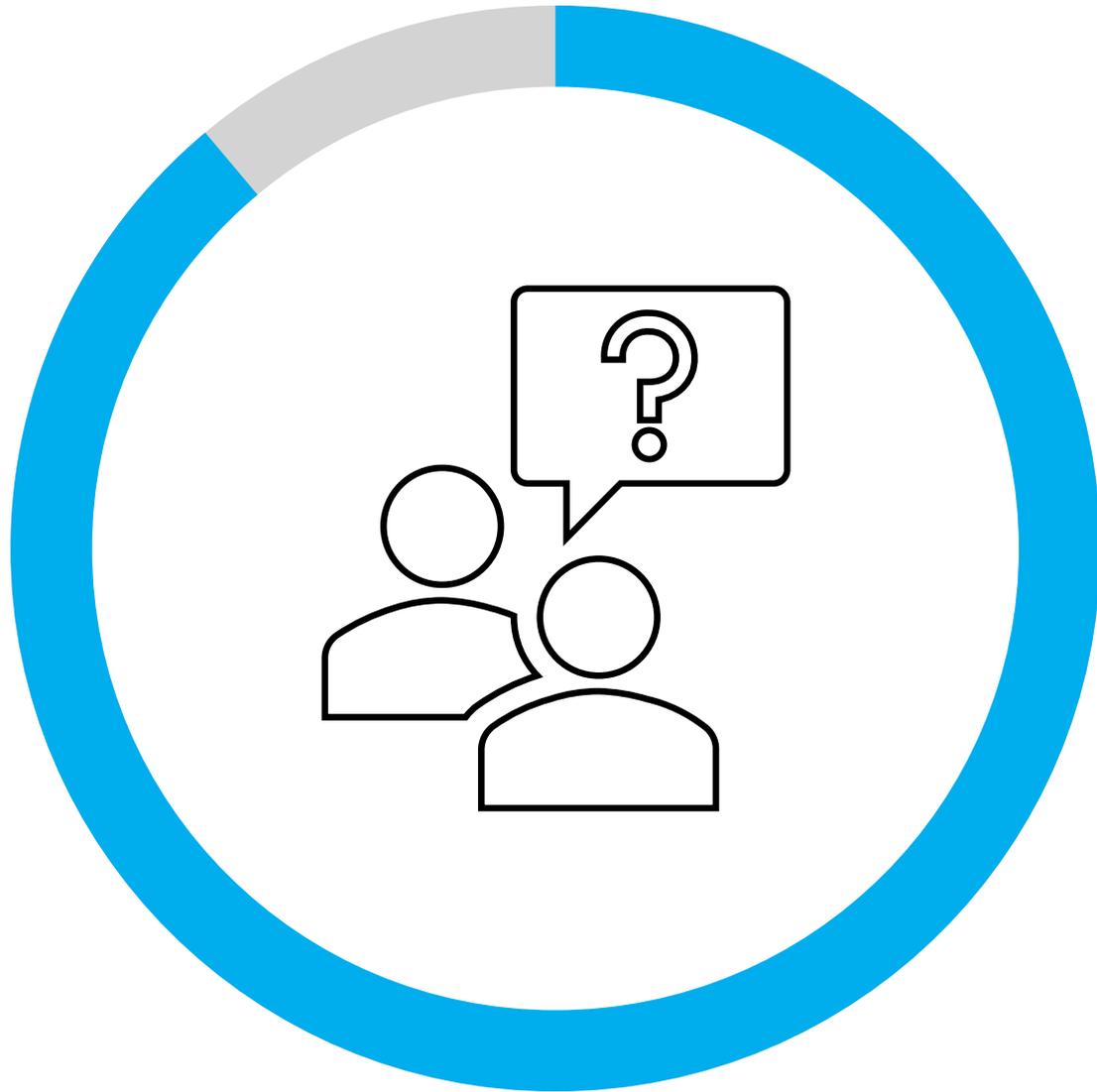
2021 Pedestrian Mall

Public Surveys



Prepared by Organizational Performance and Strategy
October, 2021

ST. JOHN'S



Survey methodology

- Online public survey
 - 927 responses
 - Responses collected between September 7 and September 29, 2021
 - Average completion rate 77%
- On-site consumer intercept survey
 - 73 responses
 - Responses collected between August 18 – August 27, 2021
- The number of respondents for each question is denoted throughout this report by “n=”

Who Completed the Survey



Demographics

Where people live

- 73% of survey respondents resided in St. John's
- 21% resided outside the metro area, elsewhere in NL
- 2% resided outside Newfoundland & Labrador

St. John's	73.2%
Mount Pearl	5.8%
Paradise	5.6%
Conception Bay South	3.6%
Torbay, Flatrock, Pouch Cove, Bauline	2.6%
Portugal Cove-St. Phillips	1.8%
Logy Bay-Middle Cove-Outer Cove	0.6%
Southern Shore	0.7%
Outside Newfoundland & Labrador	1.7%
Prefer not to answer	0.2%
Other, not listed above	4.2%

n = 881

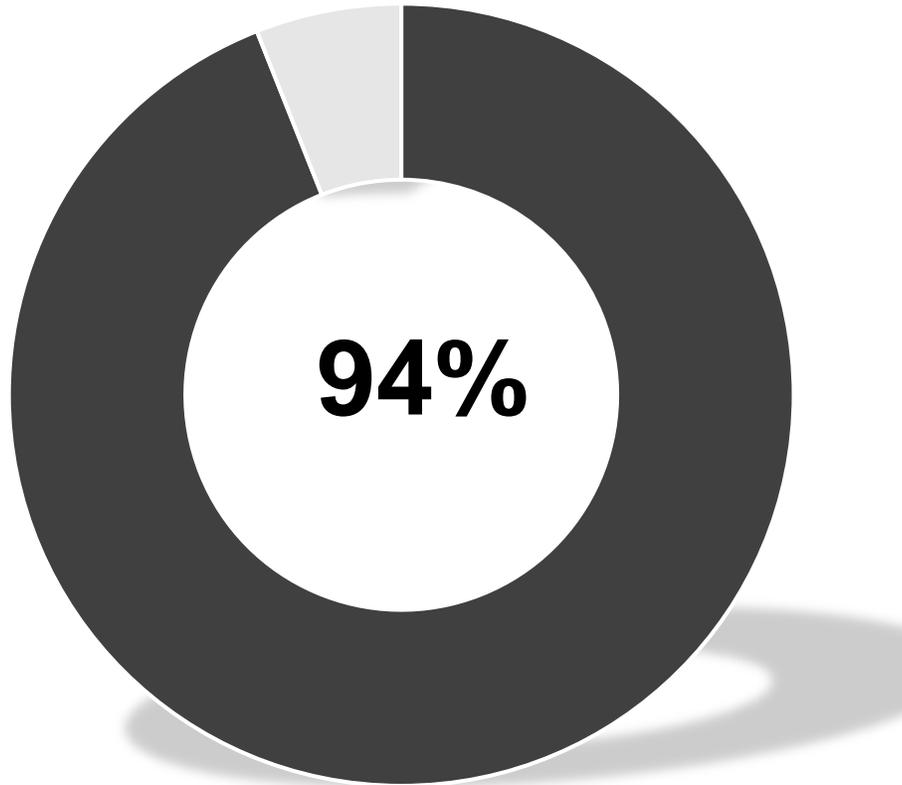
Ages

- All age groups represented
- Under 18 representation is minimal
- In-person survey has more balance between ages



Visiting the pedestrian mall





Of people who responded to the online survey had visited the pedestrian mall

n = 927

For those who had **not** visited the pedestrian mall (6%), the most common reasons given, in order, were:

Parking downtown is a challenge
Not interested in downtown
Prefer to shop/dine etc. elsewhere
COVID-19 (e.g., too crowded)
Schedule didn't permit/was working or away
Accessibility issues

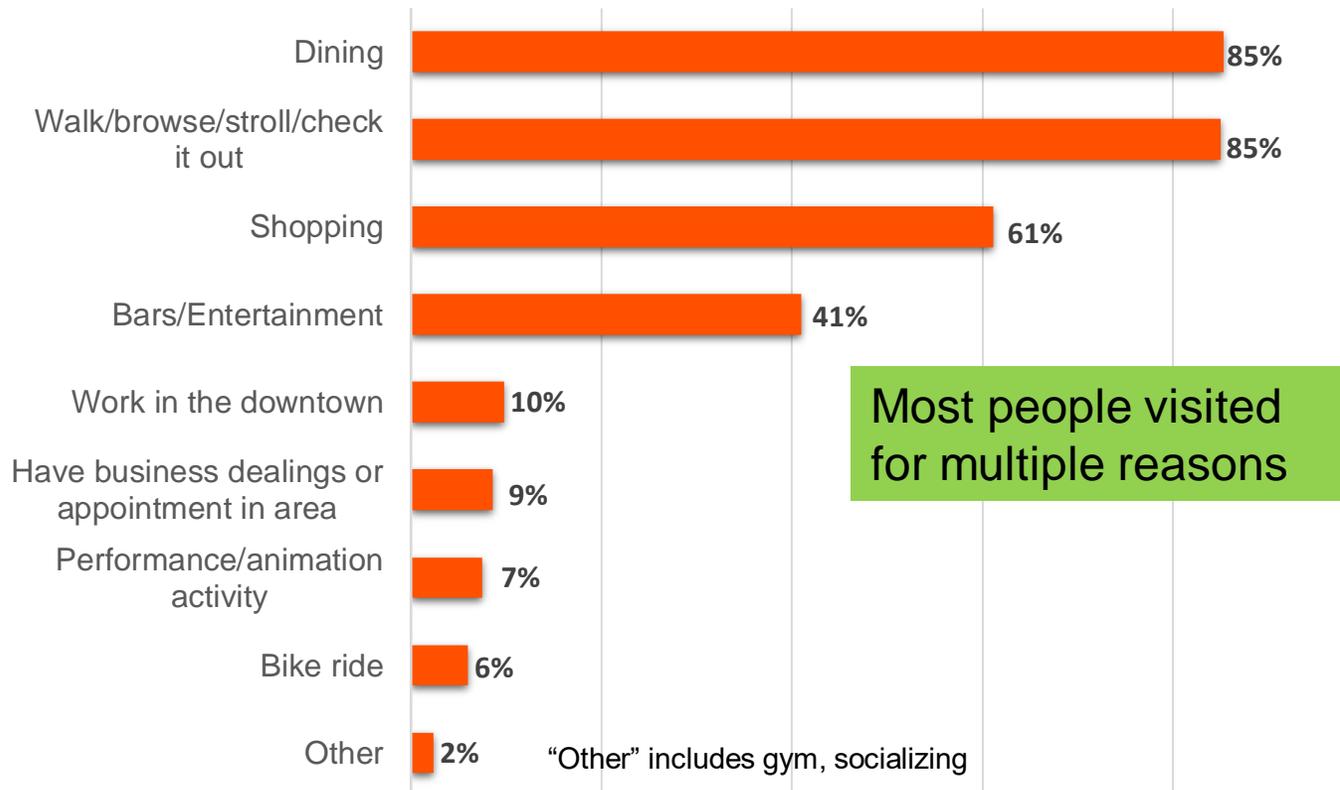
n = 60



Online Survey

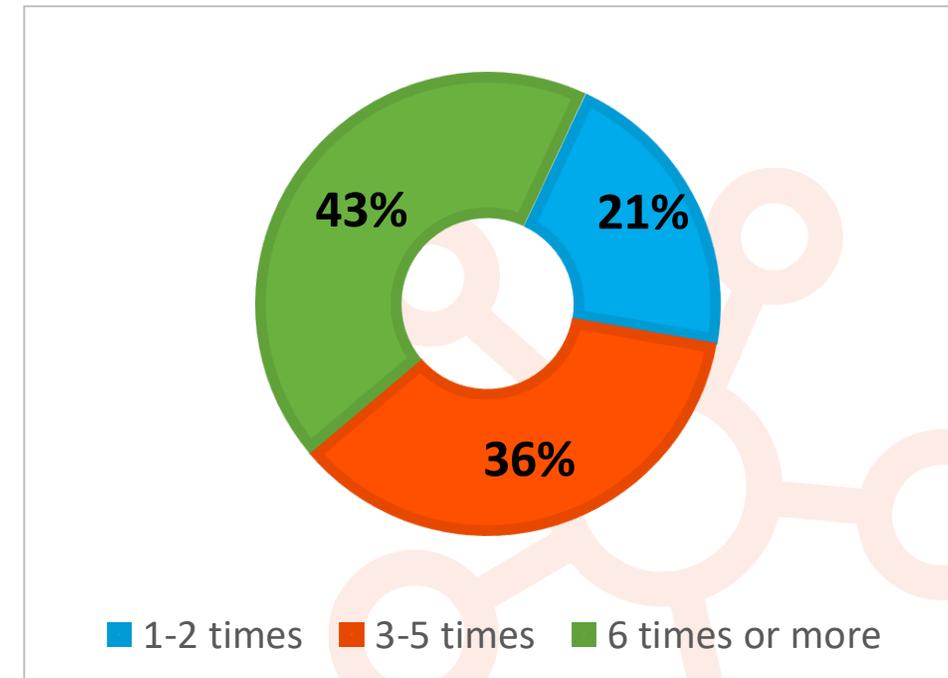
Reasons for visiting the pedestrian mall

n = 857 (multiple responses permitted)



Number of times visiting the pedestrian mall

n = 840

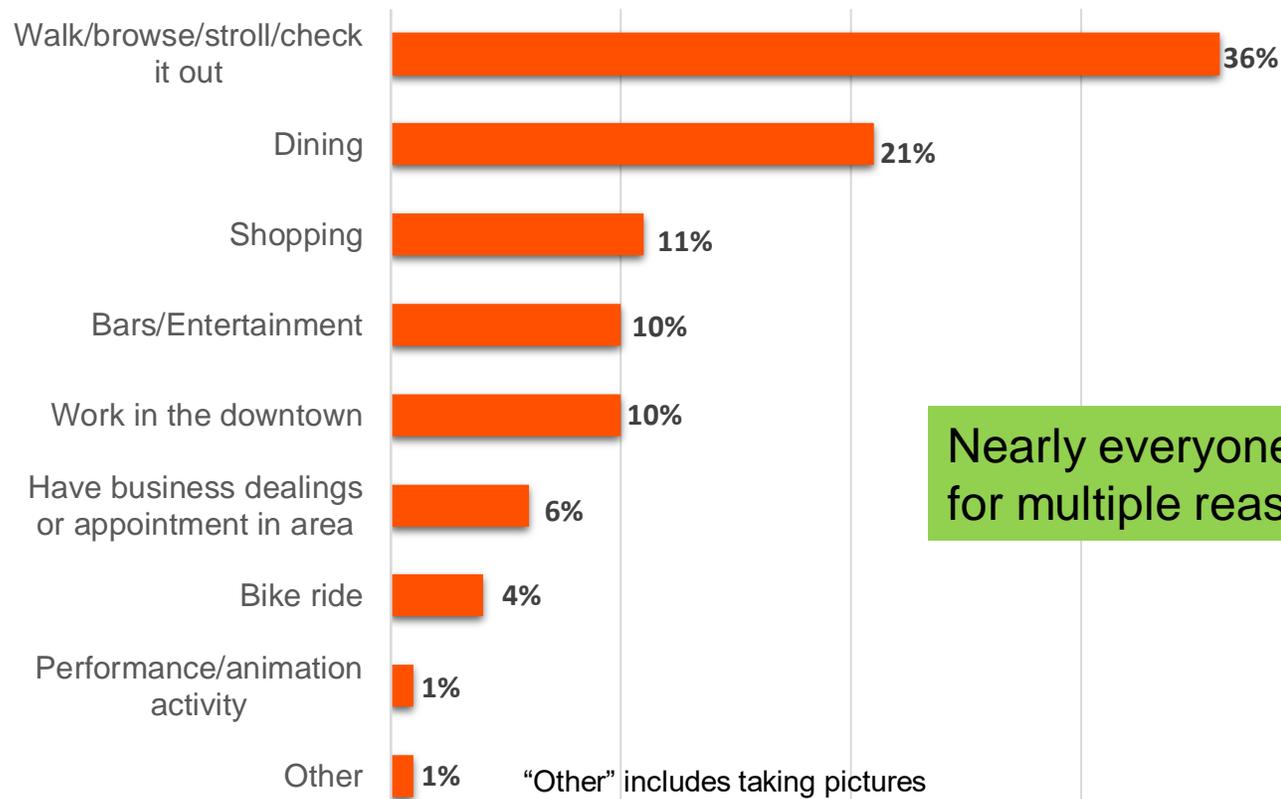


79% Visited the mall 3 or more times

In-person Survey

Main reasons for visiting the pedestrian mall

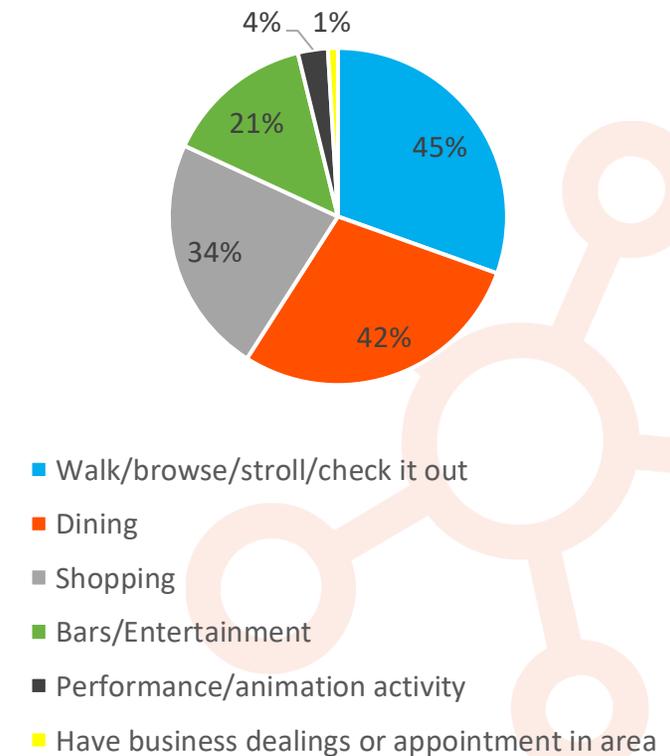
n = 72



Nearly everyone visited for multiple reasons

Other activities during today's visit

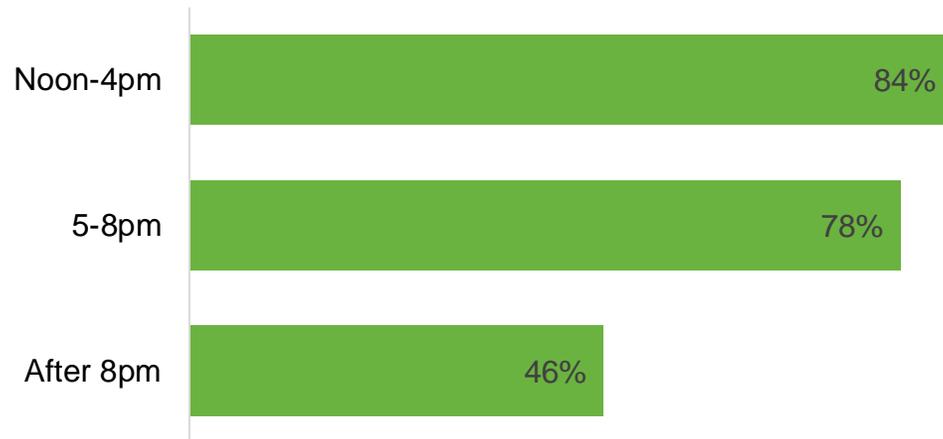
n = 71



- Walk/browse/stroll/check it out
- Dining
- Shopping
- Bars/Entertainment
- Performance/animation activity
- Have business dealings or appointment in area

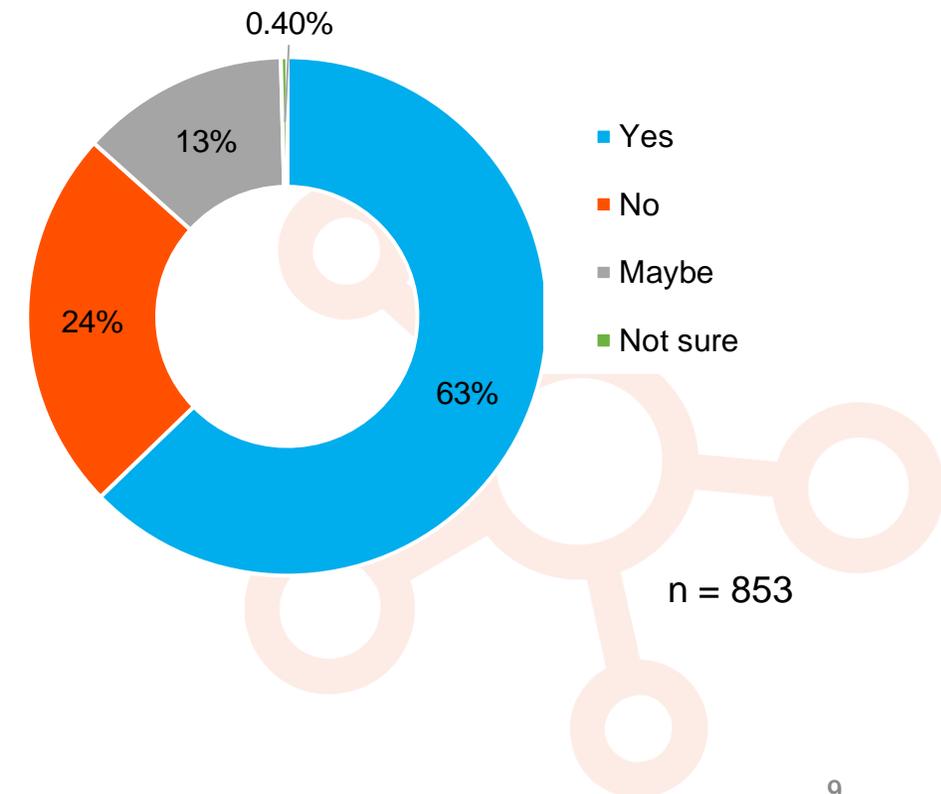
Online Survey

When people visited



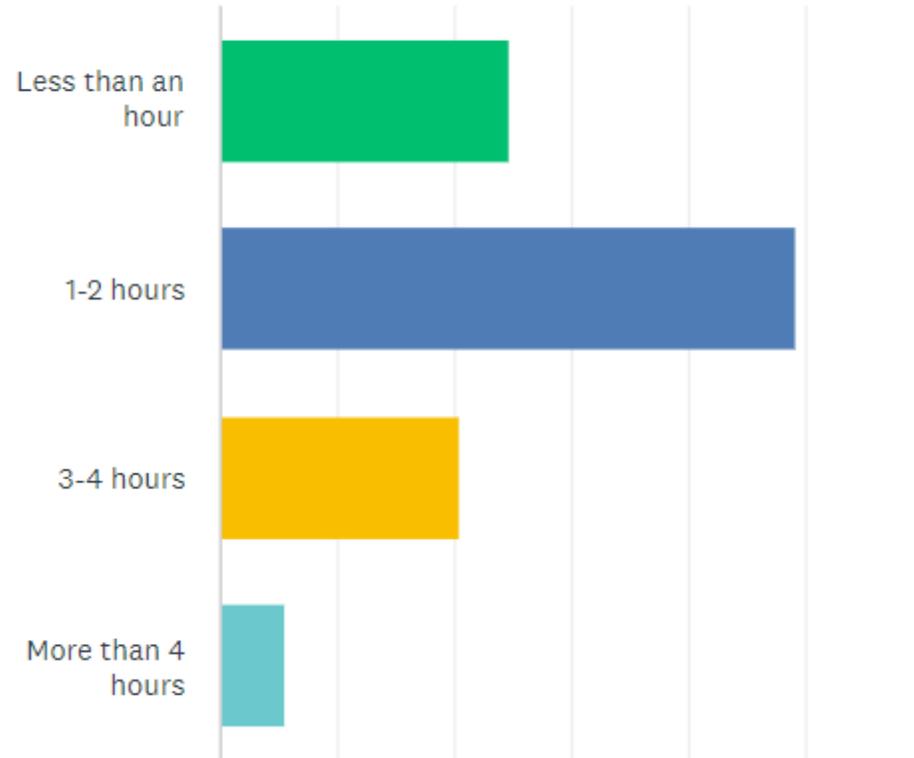
n = 839 (multiple responses permitted)

Did the weather influence your decision?



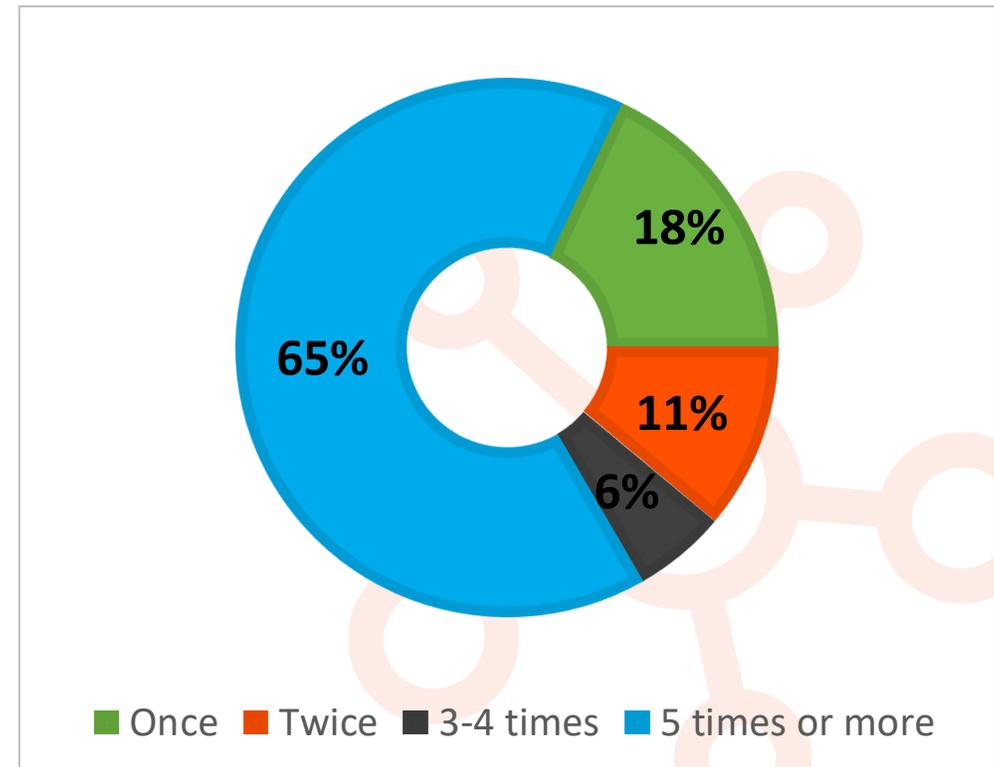
In-person Survey

Length of visit today



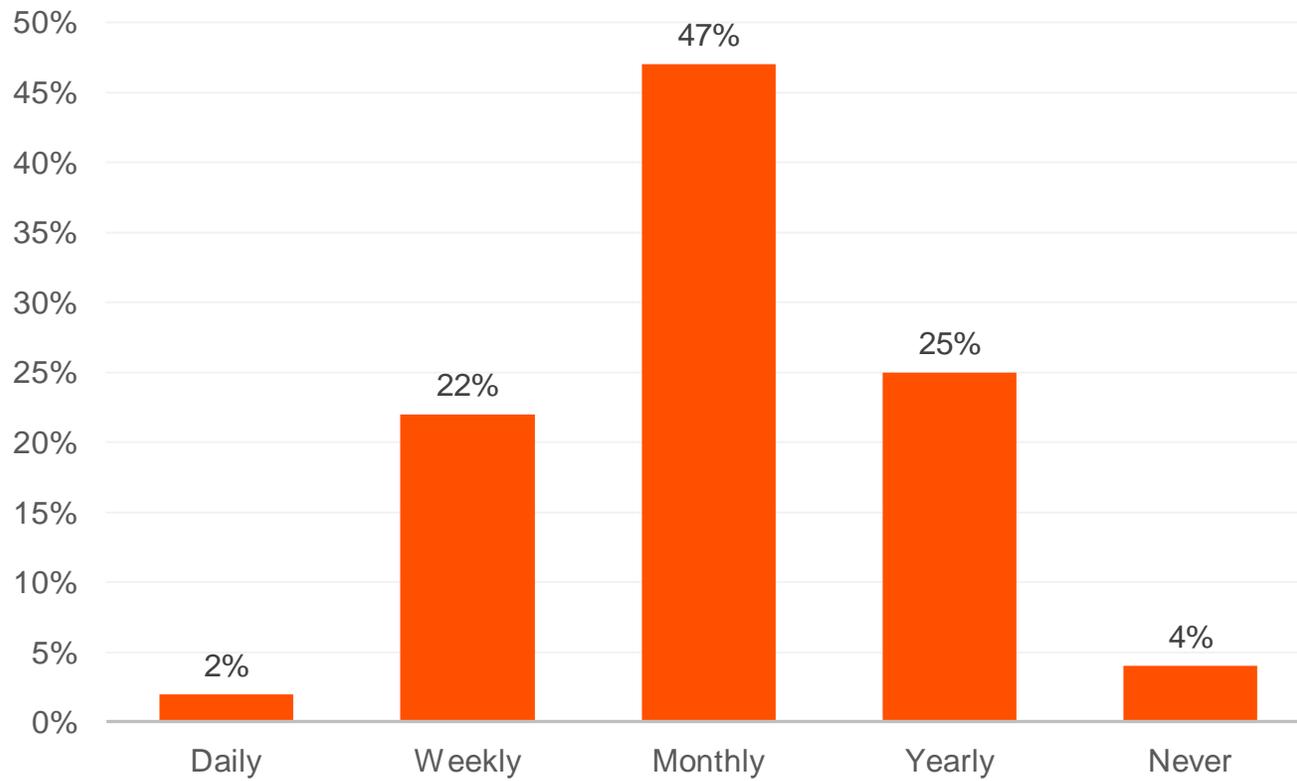
n = 73

Number of times visiting the pedestrian mall



n = 72

How many times people visited the downtown for shopping, dining, or entertainment prior to the existence of the pedestrian mall



n = 827

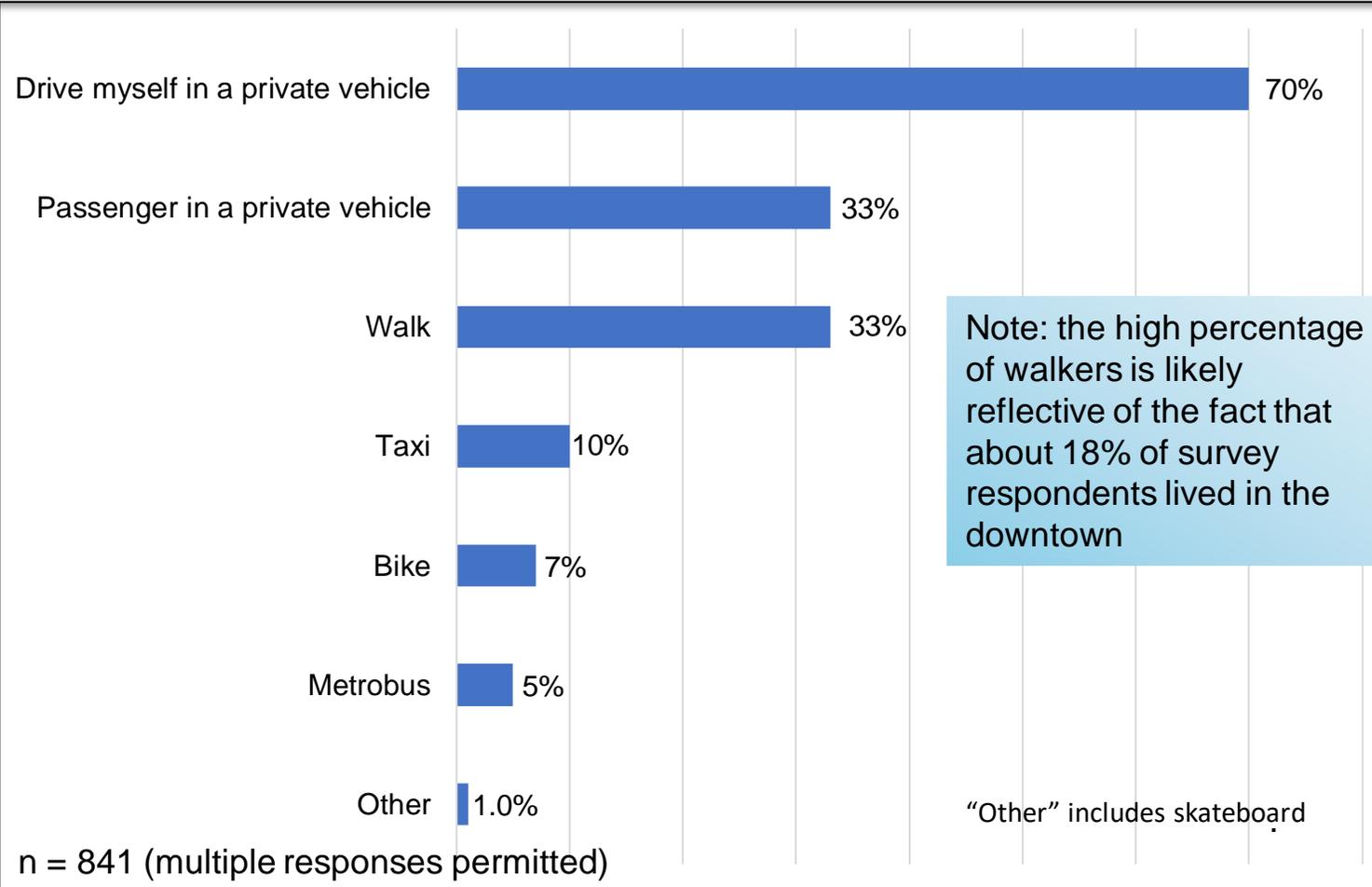
When asked why they had not visited the downtown more frequently, the most common reasons given, in order, were:

- Parking is a challenge in the downtown
- No reason to visit/not interested
- Prefer to use services/shop elsewhere
- Don't live in or near the city/visitor

n = 238

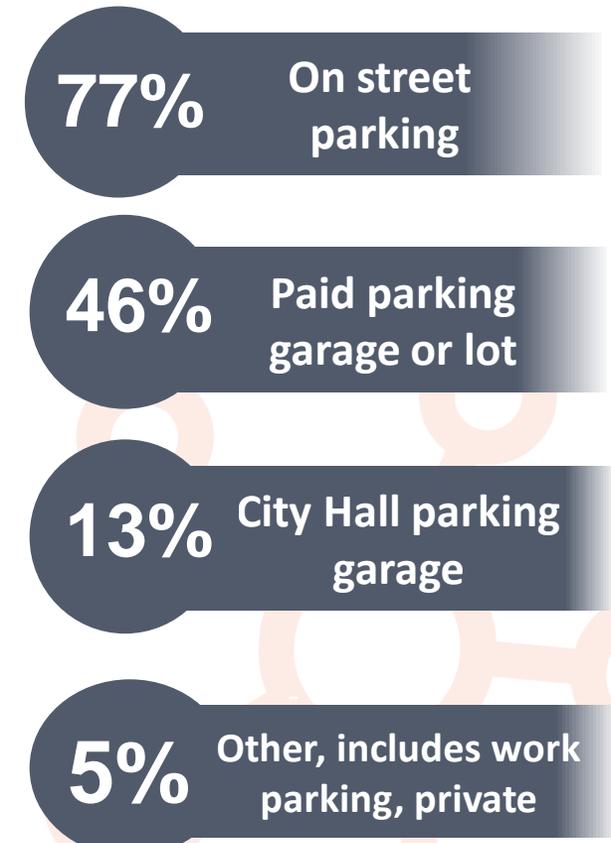
The in-person survey had similar data, except for a higher ratio of out of province visitors in 2021.

How customers travelled to the mall



The in-person survey had similar data.

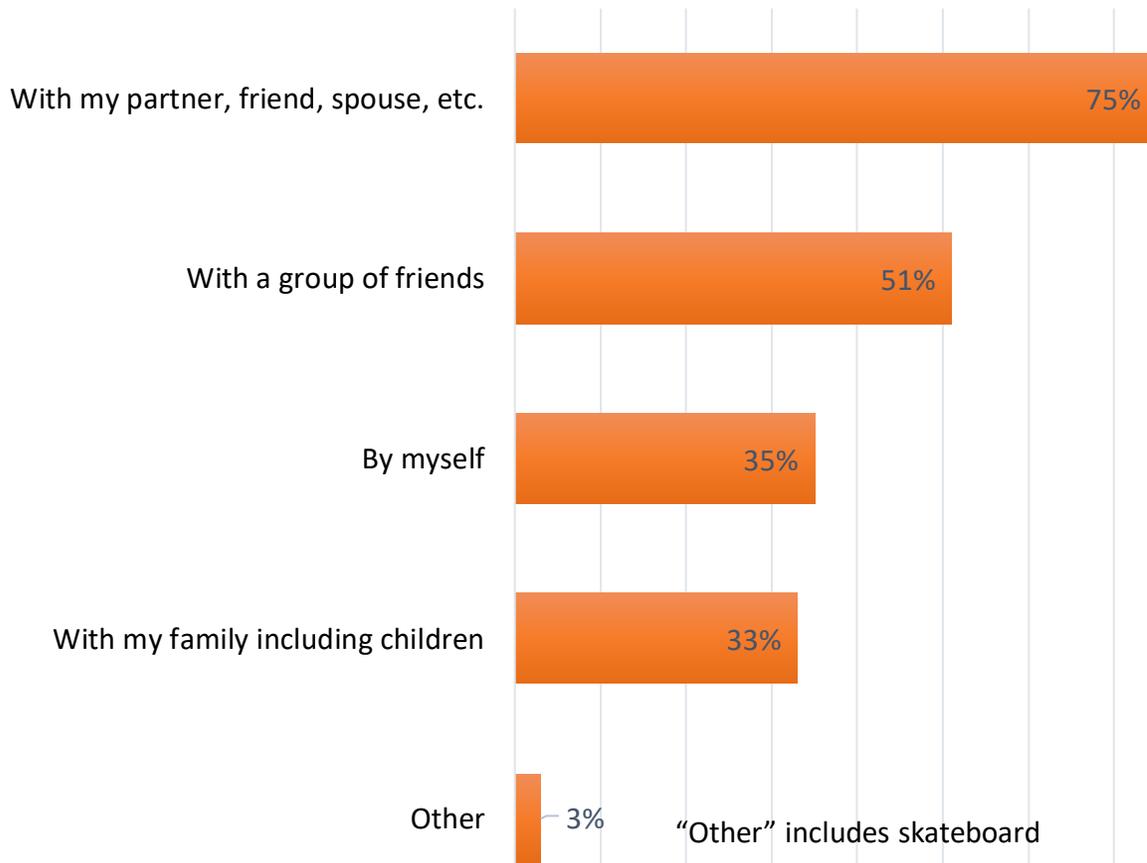
Where people parked



n = 585 (multiple responses permitted)

Group Size & Composition

Did you visit with a group or by yourself?



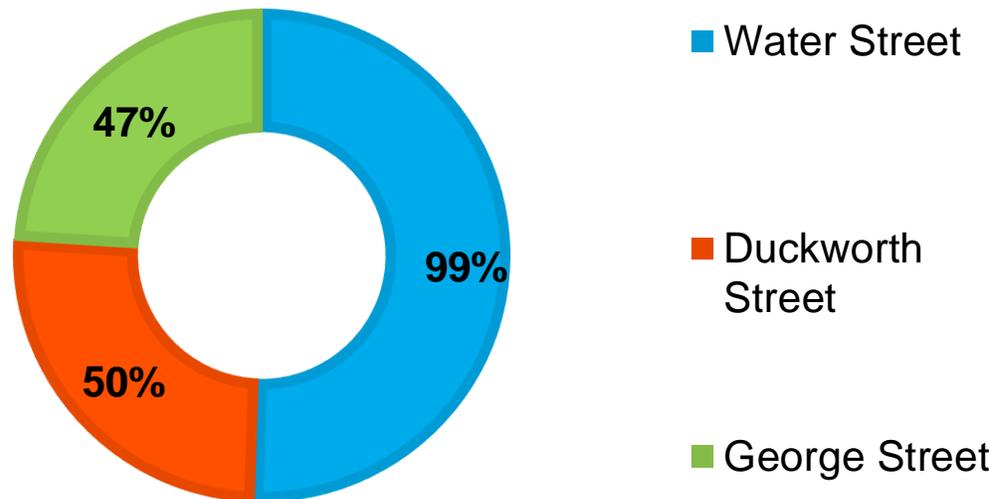
n = 857 (multiple responses permitted)

How "Family Friendly" was it?

- All group sizes and compositions (i.e., age brackets of respondents) answered similarly
 - Approx. 2/3 said "Very"
 - Approx. 1/3 said "Somewhat"
 - A small number (25) said "Not at all"
- The exception was groups of friends represented by youths aged 18 or younger, of whom 100% said "Very"

n = 846

Sections of pedestrian mall visited



n = 849 (multiple responses permitted)

For the sections you did not visit, what was the reason for not visiting?

Duckworth St.

(n=340)

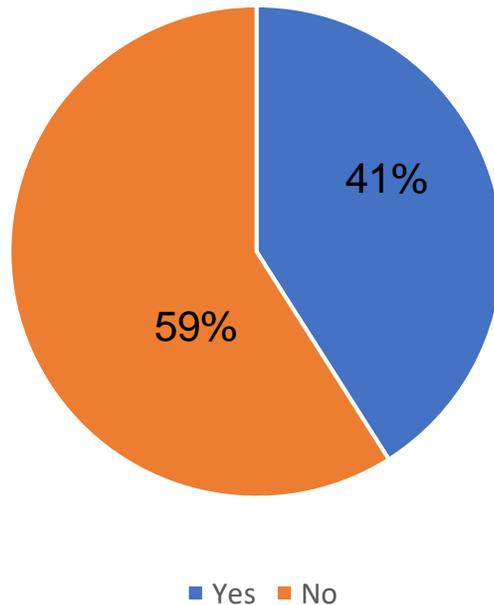
- Not interested or did not need to: 263
- Everything is on Water St.: 78
- Not convenient/Not connected: 66
- Vibe: 38
- Parking: 19
- Accessibility: 9
- COVID-19: 4
- Safety (i.e., road traffic): 2

George St.

(n=266)

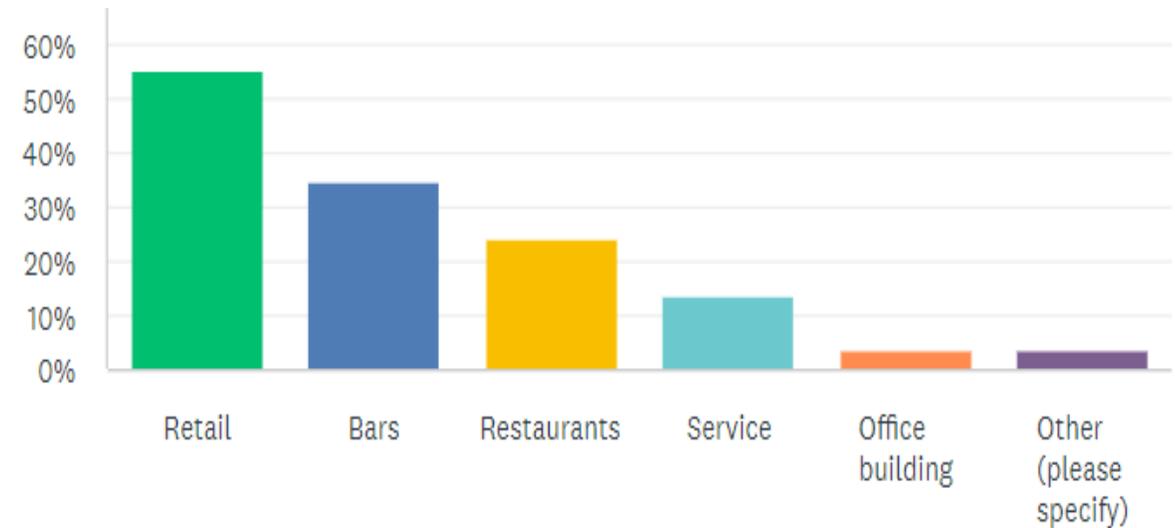
- Not interest or did not need to: 264
- Minor/Dislike bars: 41
- Not Convenient/ Not Connected: 18
- COVID-19: 16
- Everything is on Water St. : 15
- Not clean: 11
- Accessibility: 7
- Cyclists (i.e., in my way): 1

Did you visit businesses downtown outside the mall



n = 73

What other businesses have you visited?



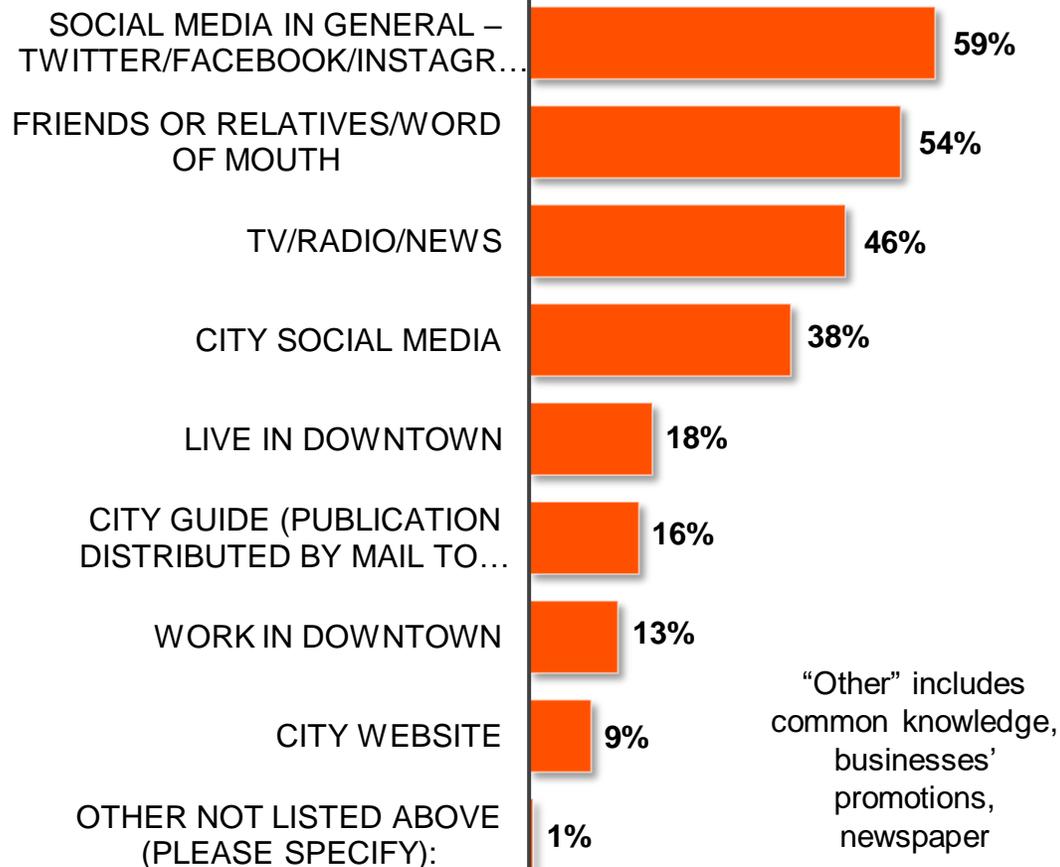
n = 29

"Other": Gallery

How people heard about the pedestrian mall

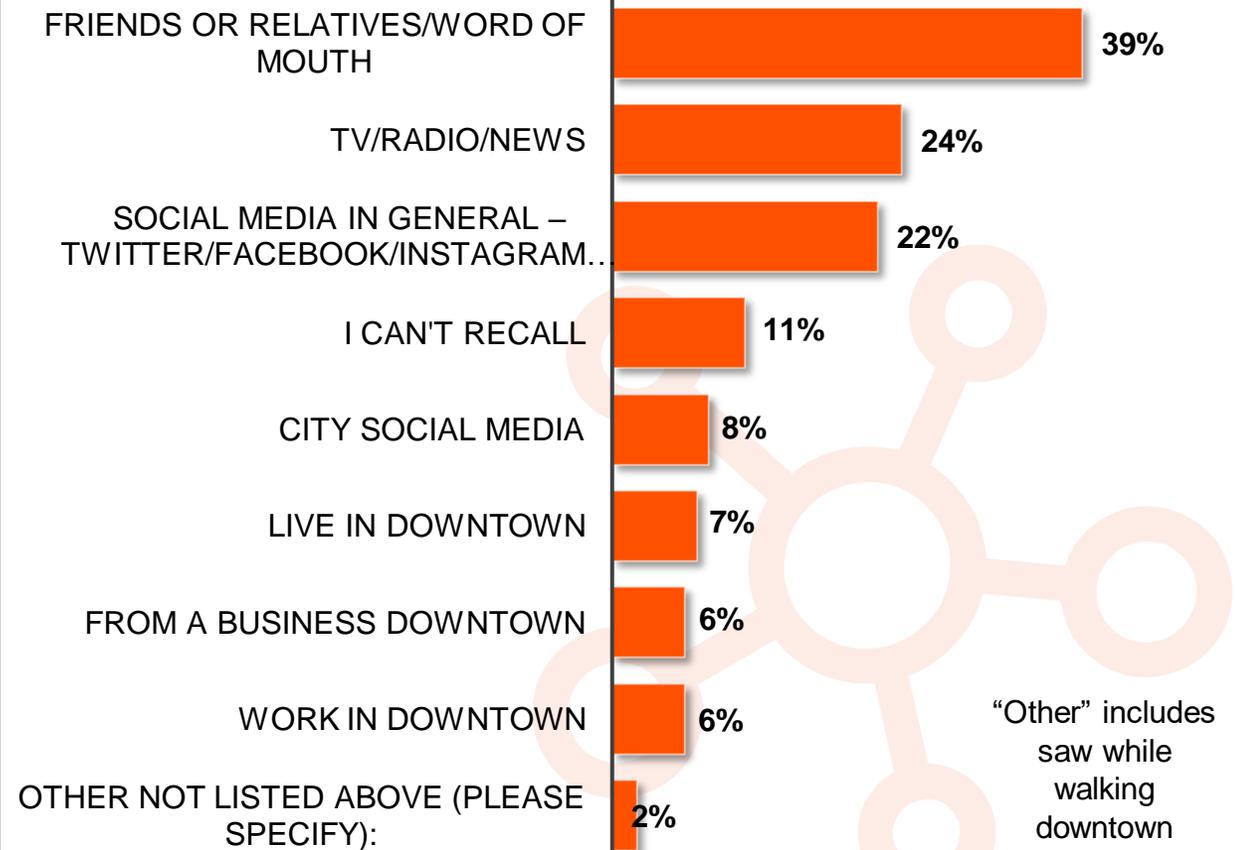
Online Survey

n = 824 (multiple responses permitted)



In-person Survey

n = 72 (multiple responses permitted)



Satisfaction Measures



Overall Satisfaction

Online Survey

- Survey respondents rated their overall satisfaction with the pedestrian mall on scale of 1 to 5, where 1 was poor and 5 was excellent
- Overall satisfaction was down from 4.5 in 2020
- Satisfaction was rated the highest (4.3) by visitors after 8pm



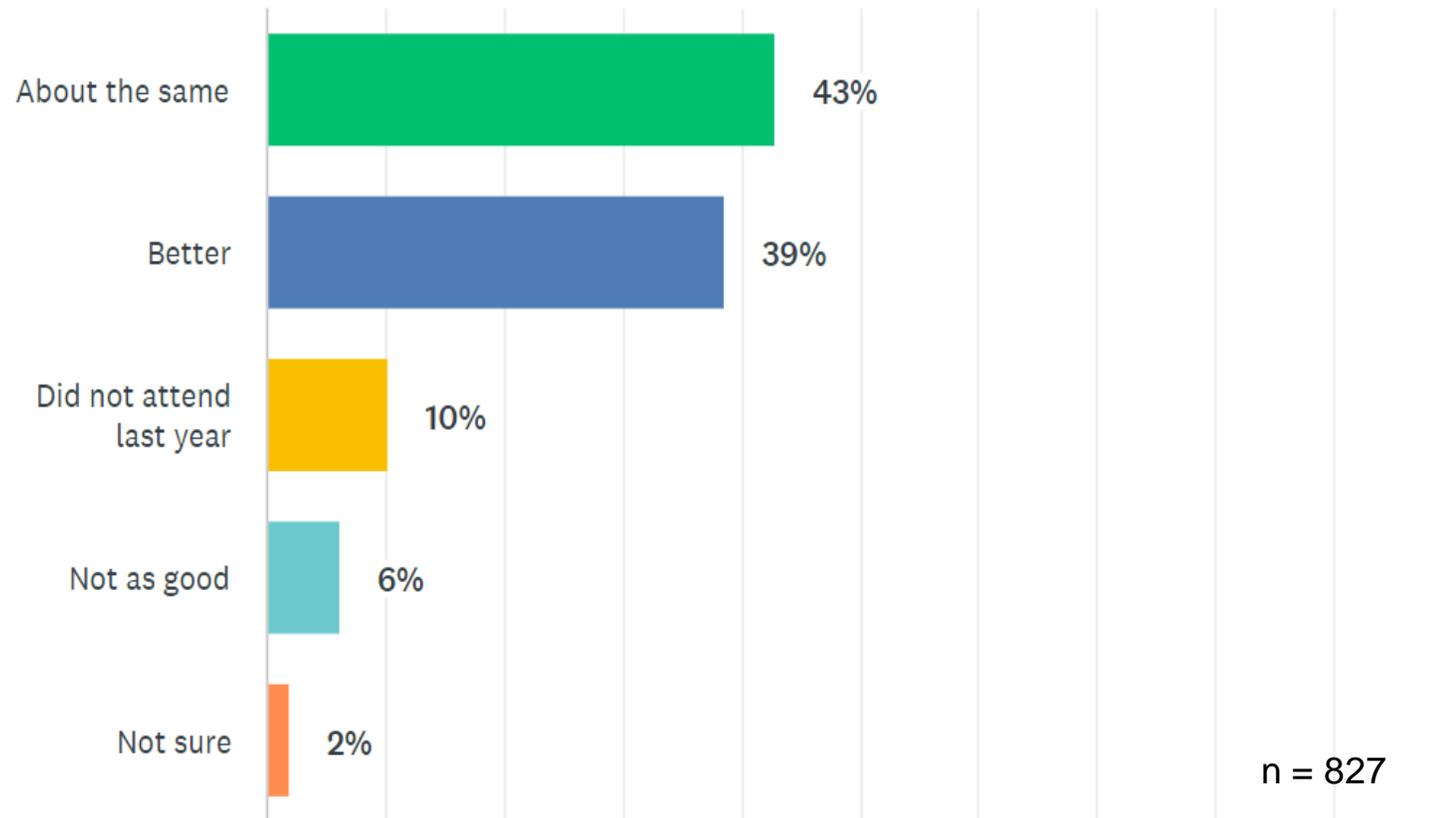
Overall Satisfaction

In-person Survey

- Survey respondents rated their overall satisfaction with the pedestrian mall on scale of 1 to 5, where 1 was poor and 5 was excellent



How would you say the pedestrian mall compares with last year?



The in-person survey had similar data, except for a higher ratio of out of province visitors in 2021

Positive comments (58) mentioned:

- More decks/patios/options: 45
- Activities/Animation: 8
- Busier/more going on: 5
- Better accessibility: 3
- Duckworth addition: 3
- Music: 3

Negative comments (77) mentioned:

- Duckworth addition: 46
- Parking: 9
- Less busy: 8
- Weather was worse: 7
- Busier/more going on: 4
- More decks/patios/options: 4

(some individuals had both negative and positive comments)

Rating Various Aspects of the Pedestrian Mall

Online Survey

n = 831

Percent rating as
GOOD or EXCELLENT

In-person Survey

n = 72

Feeling of safety within the space

89%

98%

Availability of seating (excluding restaurants)

Atmosphere or inviting nature

84%

97%

Atmosphere or inviting nature

Cleanliness

82%

96%

Cleanliness

Availability of seating (excluding restaurants)

72%

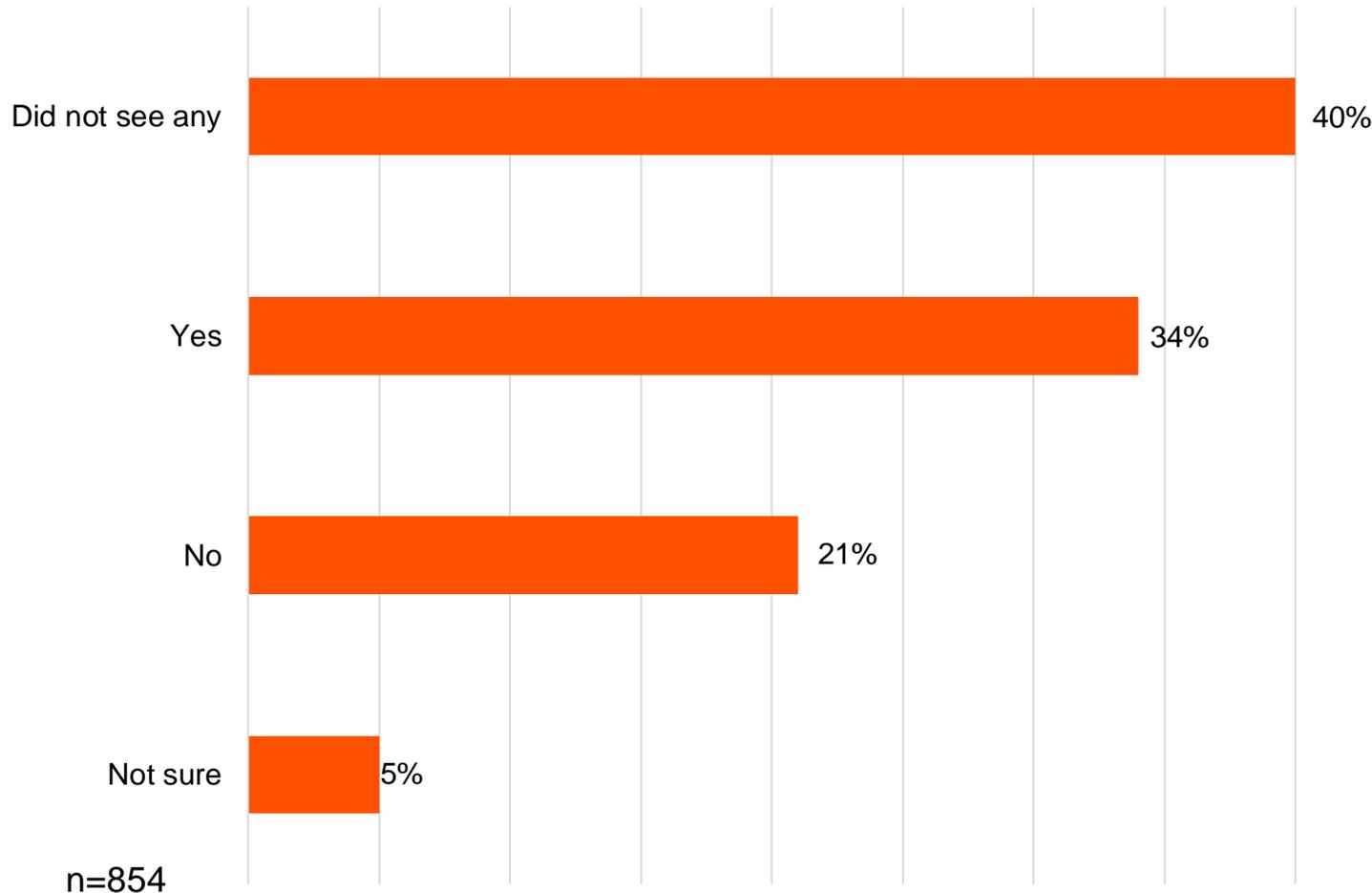
87%

Feeling of safety within the space



Performance/animation activities

Did it add to your experience?



The most common positively mentioned activities from the comments were:

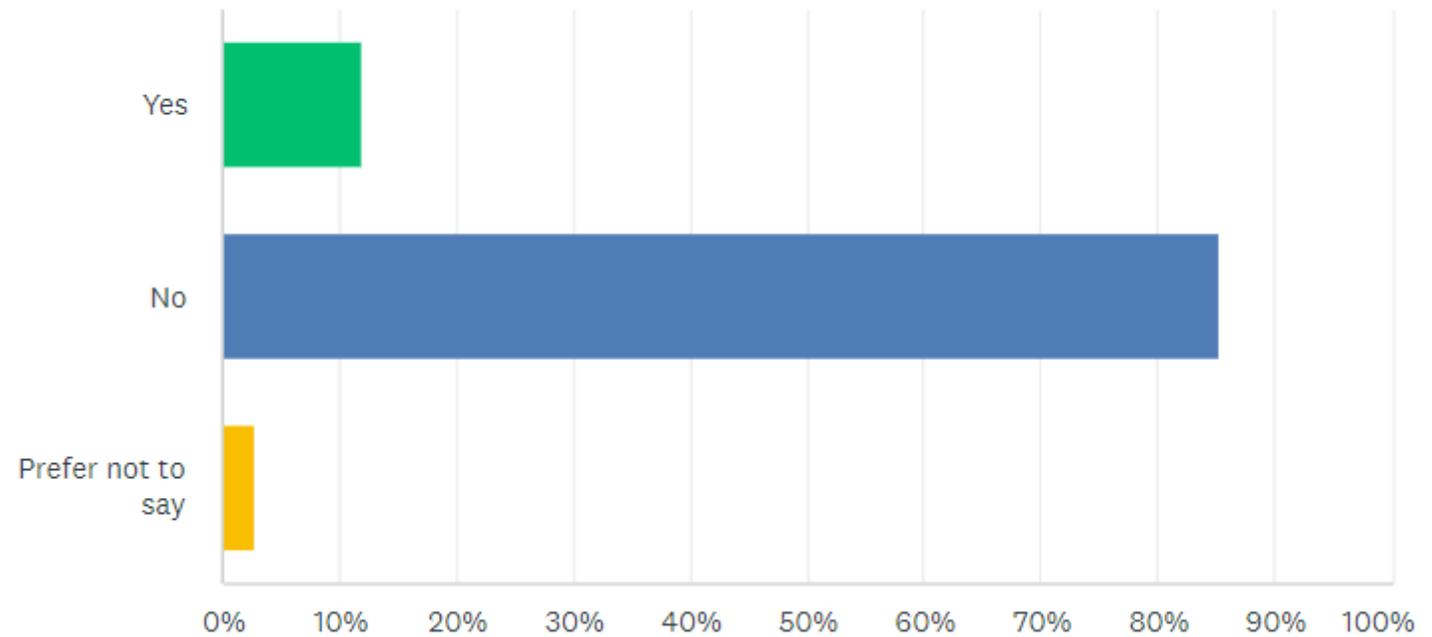
- Musicians/Buskers (33)
- Pirates (10)
- Drag show (8)
- Historic/tattoo (8)
- Magician (7)
- Bands (7)
- Dancing (6)
- Circus/acrobats (5)
- Other: balloons, games, print making, stunts

Negative comments included “too noisy” and “did not know about any.”

n=132

Any accessibility issues?

- No: 704
- Yes: 99
- Prefer not to say: 23



The in-person survey had similar data

n=826

Accessibility Comments

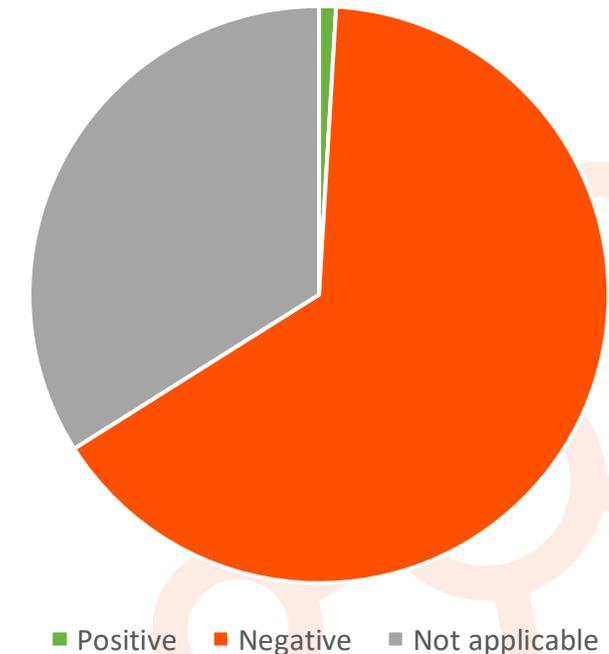
- All respondents had the option to comment on this question
- Of those who commented

Positive	1
Negative	70
Not applicable	36

- N/A comments were:
 - From respondents who noted they do not have any mobility limitations (i.e., explaining that while they said they had “no accessibility issues”, they recognize they may not have noticed)
 - Comments relating to different questions
 - General comments (e.g., ‘it closes too early’)

n=107

Comment Type



Negative Accessibility Themes

25: Ramps/Curbs (gap to door, curbstops covered by parklets, too few, ramps not suitable - too narrow or blocked on one end)

18: Parking (not enough, not close enough)

18: Patio/Seating (too high, too close together, blocking ramp, too few accessible/convertible)

8: Bike/stroller (e.g., could not get stroller onto patio)

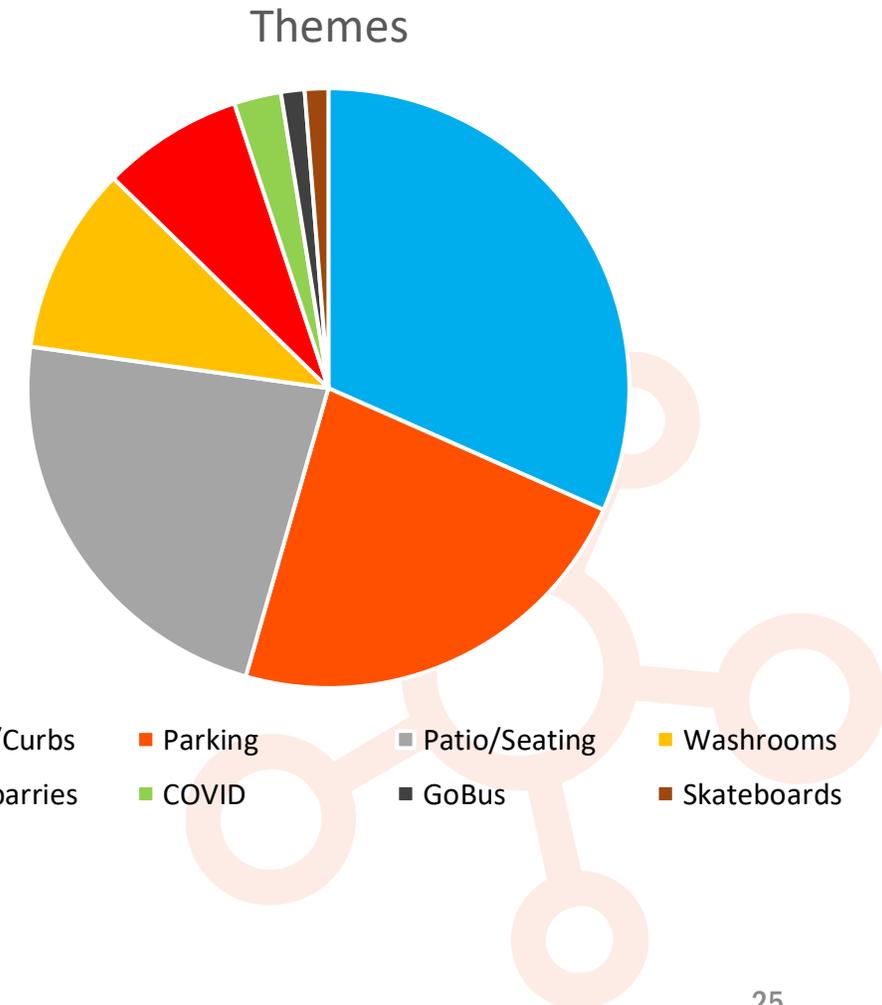
6: Accessible washrooms

2: Street barriers (too tight to accommodate)

2: COVID (e.g., too crowded to social distance)

1: GoBus (not convenient)

1: Skateboards

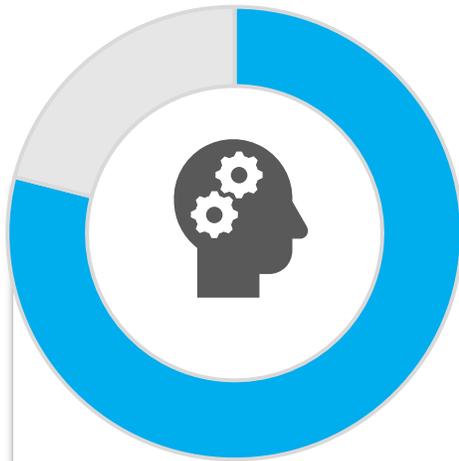


n=70 Some responses mentioned multiple themes.

Consumer Behaviour Impacts



Deciding to go downtown

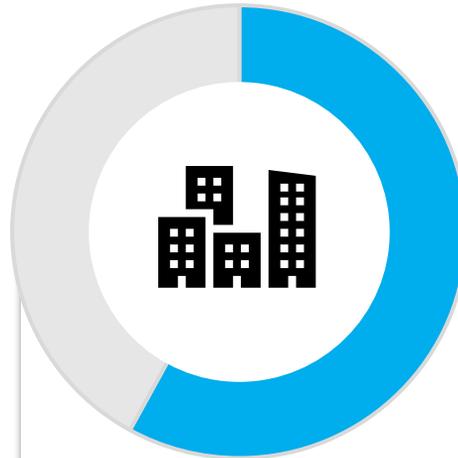


79%

The availability of the pedestrian mall influenced the decision to go downtown

n = 847

Discovering new services

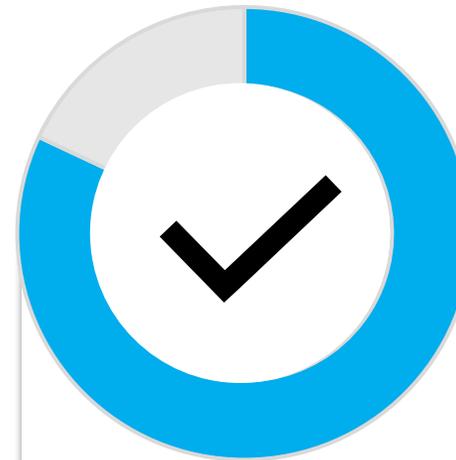


58%

The pedestrian mall helped to discover new services or businesses downtown

n = 850

Choosing downtown in the future



82%

Experience with pedestrian mall increased likelihood to visit downtown in the future

n = 825

The in-person survey had similar data. Figures are slightly lower in 2021, perhaps higher awareness overall.

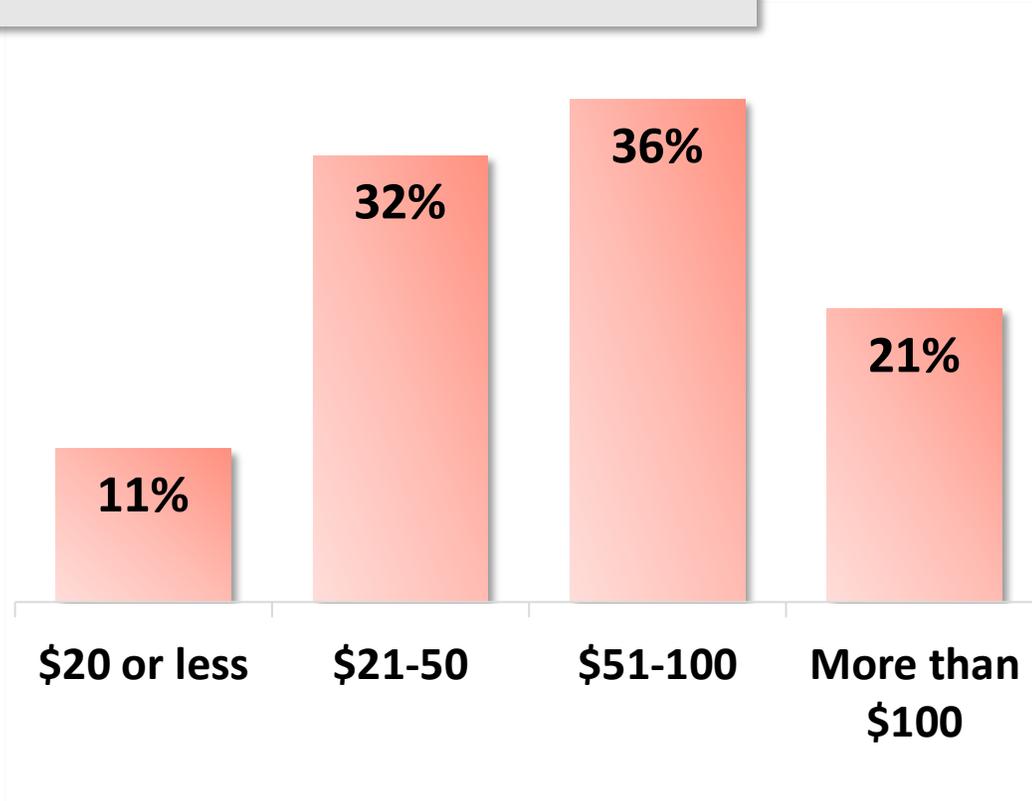
60%

Of respondents that were previously infrequent visitors to the downtown (yearly or never) indicated they were now more likely to choose the downtown in the future

n = 238

Consumer spending per visit

Online Survey



n = 837

In-person Survey



n = 25

Online Survey

What could improve the pedestrian mall?

The most popular comments were, in order:

- Make it larger/longer
 - More food trucks
 - More buskers or other entertainment
 - Add a Christmas market
 - Don't include Duckworth
 - Improve accessibility
 - Improve/increase parking
 - More umbrellas/shade on decks
- n = 596

In-person Survey

If you could make one change...

The most popular comments were, in order:

- More umbrellas/shade on decks
 - More buskers or other entertainment
 - Improve/increase parking
 - Make it larger/longer
 - Improve barriers
 - Add decorations (i.e., like Christmas markets)
- n = 66