



MARK WILKINS CONSULTING
MARKET RESEARCH + STRATEGY

Resident Survey on the Business Arteries of the City of Westmount

Conducted on behalf of:



RESEARCH REPORT

June 2017



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Context



- **The City of Westmount is currently undertaking a study of its main commercial arteries - Greene Avenue and the Victoria Village area - to guide future planning.**
 - **To do so, it is collaborating with the firm *Artères* to obtain feedback from businesses located within each of these areas to understand their concerns and priorities.**
 - **To ensure that it also had a reading on citizens' perspective with regard to its commercial arteries, the City and *Artères* commissioned a survey of City residents.**
 - **Data collection for said citizen survey took place from late April to late May 2017, culminating in feedback from a total of 931 Westmount residents.**
 - **The current report presents the main findings and conclusions of this research initiative.**
-



Survey Themes / Information Objectives



- **The scope of the citizen research initiative spanned seven (7) distinct thematic areas:**
 - 1. Frequency of visits to the respective shopping areas, and underpinning reasons**
 - 2. Online shopping (prevalence/frequency, impact on local shopping areas)**
 - 3. Sources of information regarding local shopping areas**
 - 4. Mode of access (including Passport Canada use and satisfaction)**
 - 5. Perspective on local businesses (local contribution, propriety of City support)**
 - 6. Perceptions of the respective shopping areas along a series of criteria (safety, ambiance, diversity / variety, ease of parking, balance between local and chain businesses)**
 - 7. Ways in which interest in / visits to local shopping areas could be stimulated**
-



Overview

- A letter explaining the context behind the survey was distributed to every civic address (approximately 12,300 in total) within the City of Westmount in the week of April 24th, 2017.
 - The letter explained that recipients could complete the survey by one of two means: either online, via a hyperlink provided in the letter, or by pen and paper by picking up a hardcopy of the survey from any of four locations:
 - Westmount City Hall
 - Westmount Public Library
 - Victoria Hall, and
 - Westmount Recreation Centre
 - A PIN code provided within the survey letter was required in order to access the online survey or for a completed hardcopy version of the survey to be entered and added to the results database.
 - The letter and survey were provided in both French and English, allowing recipients to read about it and respond to the survey questions in the language of their choice.
-



Questionnaire Design / Data Collection

- The survey itself was developed by Mark Wilkins Consulting, based upon an initial series of information objectives developed by the City and *Artères*. A copy of both the English and French versions of the survey are provided as an Appendix.
 - Having commenced on April 24th, data collection formally ended on May 22nd, thereby allowing recipients approximately four weeks in complete the survey.
 - In total, 931 respondents completed the survey. Based on a total of 12,321 households, this represents a response rate of 7.6%.
 - The vast majority of those who participated in the survey elected to do so online (97% online, 3% hardcopy).
 - Roughly 9-in-10 (91%) of the sample claimed that they would be able to participate if a future surveys were to be conducted exclusively online (95% amongst those who completed the survey online, 53% amongst those who completed it hardcopy).
-



Survey Duration / Completion Rate

- The survey was designed with the goal that residents should be able to complete it within a span of 8 to 10 minutes maximum.
 - The actual observed average survey duration (online only) slightly exceeded the upper limit, coming in at 10.5 minutes.
 - Of 975 who commenced the survey online, a total of 62 failed to complete it, with most drop-offs occurring roughly $\frac{3}{4}$ of the way through the survey, for a 94% completion rate (conversely, a 6% dropout rate).
 - While a completion rate in excess of 90% is unquestionably a success, this outcome nevertheless underscores the importance for future citizen research initiatives of keeping our eyes firmly “on the clock”. To continue to foster a sense of engagement and interest on the part of citizens, it is critical to keep surveys brief and to the point.
-



Response Rate / Results Extrapolation

- In total, 931 respondents completed the survey. Based on a total of 12,321 households, this represents a response rate of 7.6%.
 - Because every household had an equal chance to participate, the survey's findings can be extrapolated to represent, within a certain margin of error, the universe of City of Westmount households.
 - The maximum margin of error at a 95% level of confidence associated with a sample of this size is $\pm 3.2\%$ (the "gold standard" is $\pm 5\%$).
 - Stated otherwise, results on the overall sample can be expected to be an accurate representation of the opinion of the universe of City of Westmount households to within $\pm 3.2\%$, 19 times out of 20.
 - Example: a value of 50% represents an actual "true" value of between 46.8% and 53.2%, 19 times out of 20.
-



Data Weighting

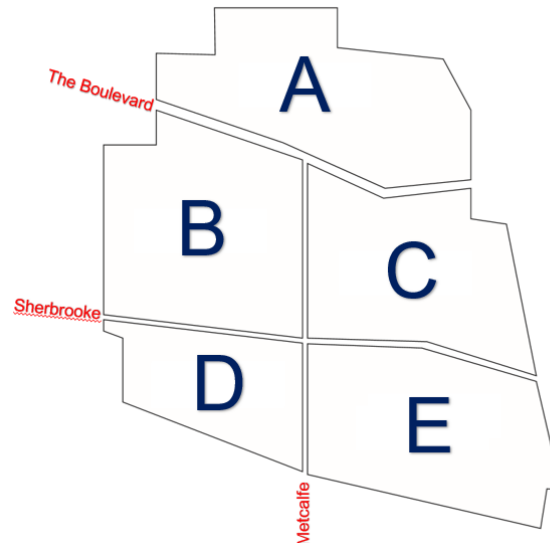
- In order to ensure that overall results accurately reflected the population of Westmount with regard to age and gender, results on the total sample were weighted according to the most recent (2011) Statistics Canada census data.
- The proportions of respondents split by age and gender are shown below, both the observed survey outcome and with weighting factors applied:

	ACTUAL	WEIGHTED
GENDER		
Male	37%	46%
Female	63%	54%
AGE		
<45 years	19%	34%
45-64 years	42%	36%
65+ years	39%	30%



Differences Between Population Sub-Groups

- In addition to the overall analysis, differences were also examined between the following sub-groups of the population:
 - By language of response
 - By age
 - By gender
 - By area of Westmount residence, as depicted below:





Differences Between Population Sub-Groups

- Where significant differences exist between sub-groups, these are noted in the report.



Ex. a green arrow pointing UP next to a result for a sub-group means they are higher on that point than a corresponding sub-group.



Ex. a red arrow pointing DOWN next to a result for a sub-group means they are lower on that point than a corresponding sub-group.



Respondent Profile



GENDER	
Male	37%
Female	63%
AGE	
<45 years	19%
45-64 years	42%
65+ years	39%
LANGUAGE	
English	84%
French	16%
MOTOR VEHICLE ACCESS	
Yes	84%
No	14%
Not stated	2%

HOUSEHOLD INCOME	
< \$50,000	37%
\$50,000 - \$99,999	15%
\$100,000 - \$149,999	11%
\$150,000 - \$199,999	7%
\$200,000 - \$249,999	5%
\$250,000 +	25%
Not stated	31%
AREA OF RESIDENCE	
A	8%
B	17%
C	16%
D	22%
E	35%
Not stated (no PIN)	3%

RESPONSE MODE	
Online	97%
Hardcopy	3%
FUTURE ONLINE RESPONSE CAPABILITY	
Yes	91%
No	7%
Not stated	2%



LEARNINGS

Current Behaviour



FREQUENCY OF VISITS



VILLE DE | CITY OF
WESTMOUNT

LEARNING: Based on the frequency with which residents visit them, both the Victoria Village and Greene Avenue shopping areas are clearly integral to the lifestyles of the vast majority of Westmount residents.

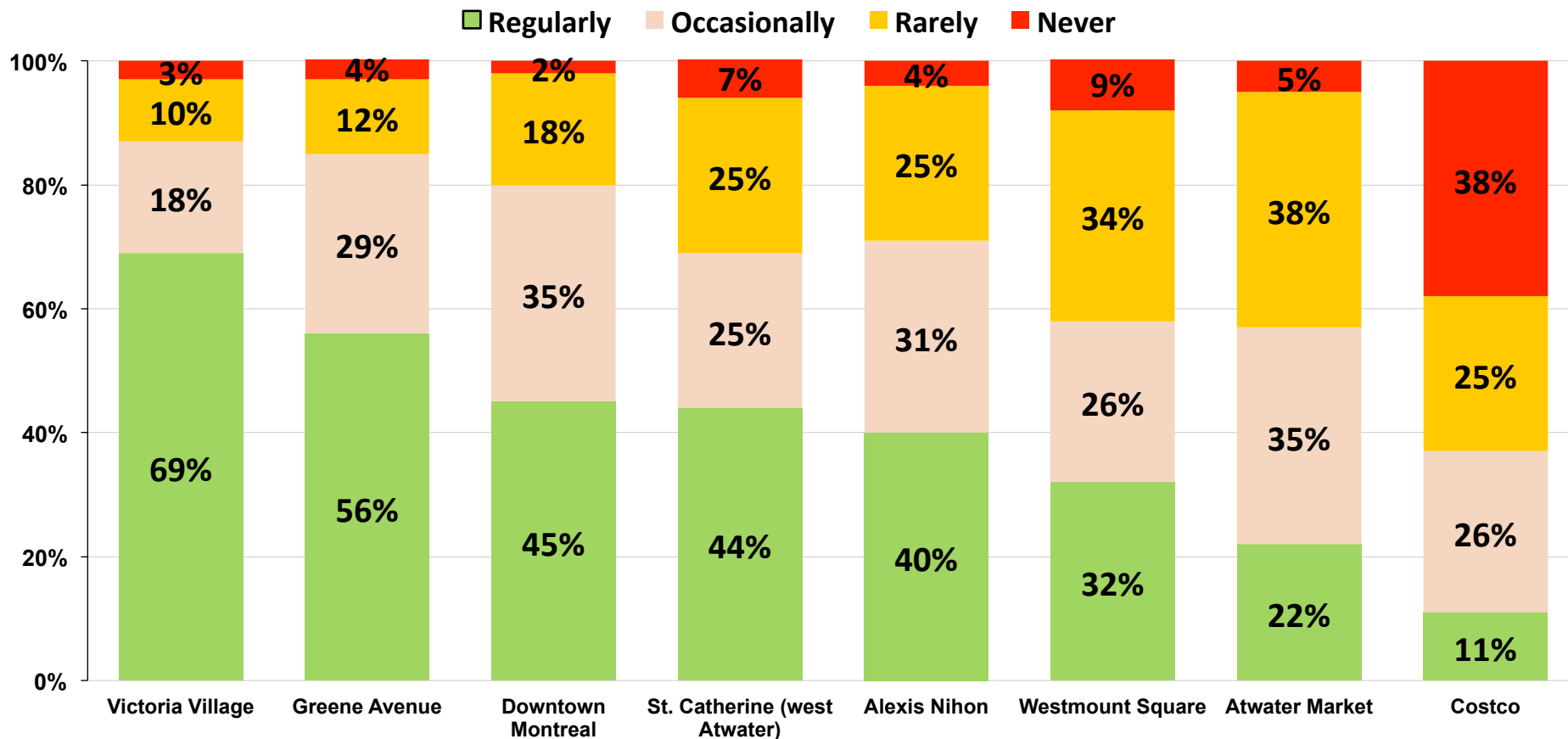
- A majority of Westmount residents visit both the Victoria Village and Greene Avenue shopping areas regularly (defined as at least once weekly) – 69% and 56% respectively.
 - Adding in those who visit occasionally (defined as at least once monthly), fully 87% and 85% of Westmount residents visit the Victoria Village and Greene Avenue shopping areas respectively every month.
 - Victoria Village is visited on average 6.5 times/month; Greene Avenue 5.4 times.
 - Only a nominal few *never* visit the areas (<4% for each).
 - Amongst other shopping areas assessed, only downtown Montreal approaches Victoria Village and Greene Avenue in terms of frequency of visits (80% at least once monthly).
 - Particularly inclined to frequent the Victoria Village shopping area: anglophones and residents living west of Metcalfe.
 - In contrast, the Greene Avenue shopping area tends to attract an older demographic (45+) and residents who live either north of the Boulevard or east of Metcalfe.
 - Finally, women tend to visit both shopping areas more often than do men.
-



Frequency of Visiting Different Shopping Areas



Q1. Please indicate the frequency with which you typically visit each of the following for any purpose (ie. shopping, dining, banking, entertainment, etc.).





Frequency of Visiting Different Shopping Areas - Detail



Q1. Please indicate the frequency with which you typically visit each of the following for any purpose (ie. shopping, dining, banking, entertainment, etc.).

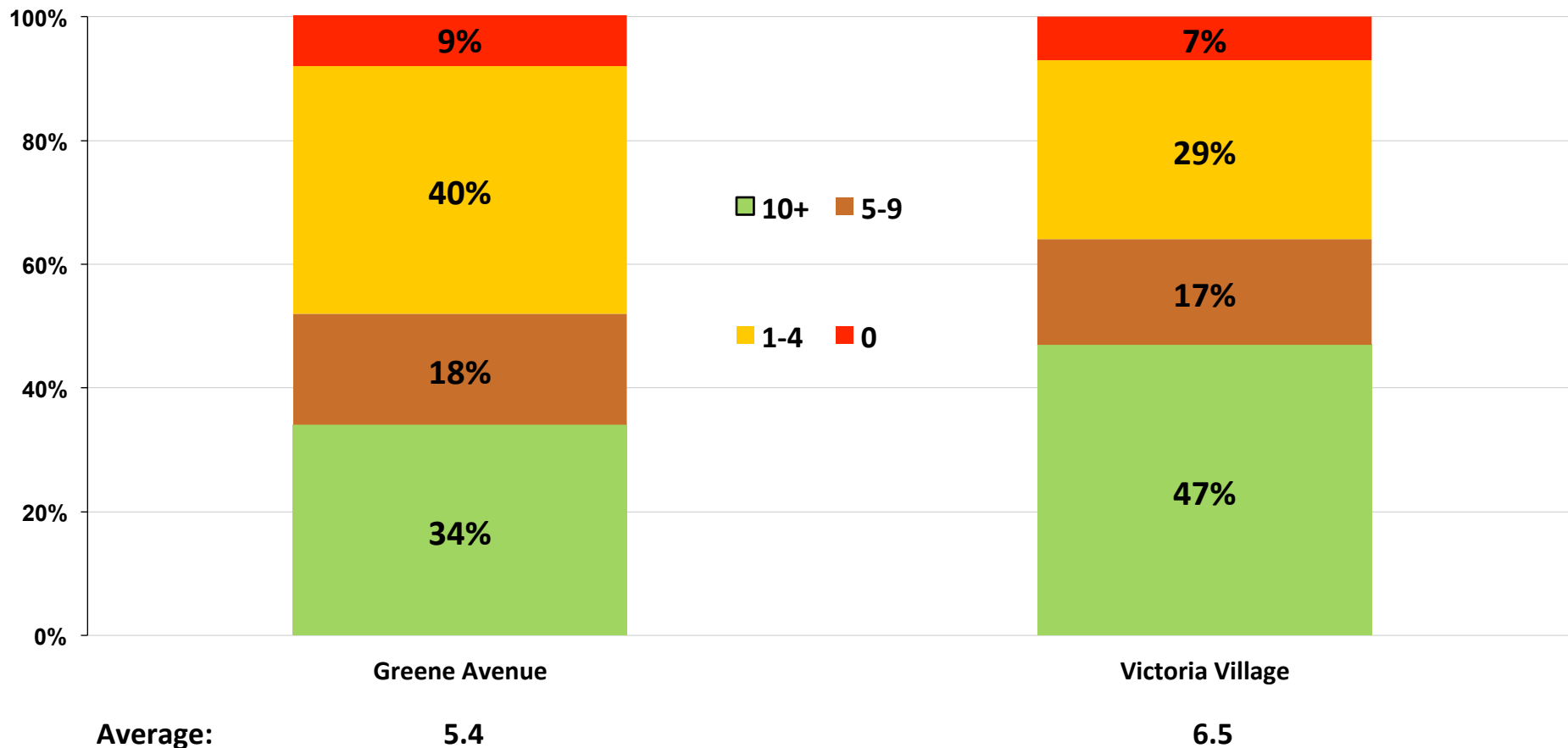
Visit Regularly	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A	B	C	D	E	Male	Female	<45	45-64	65+	French	English
	n=931 69%	n=71 73%	n=155 92%	n=146 60%	n=202 84%	n=327 57%	n=338 64%	n=567 74%	n=168 66%	n=384 70%	n=353 74%	n=153 63%	n=778 72%
Victoria Village			↑		↑			↑					↑
Greene Avenue	56%	55%	↓	73%	↓	81%	55%	61%	↓	60%	64%	53%	60%
Downtown Montreal	45%	34%	43%	46%	46%	45%	↑	40%	47%	52%	33%	↑	41%
St. Catherine (west of Atwater)	44%	38%	↓	46%	34%	66%	47%	44%	↓	47%	48%	50%	45%
Alexis Nihon Plaza	40%	↓	↓	41%	29%	58%	40%	38%	40%	36%	41%	40%	39%
Westmount Square	32%	27%	↓	40%	↓	55%	31%	37%	24%	30%	44%	↑	35%
Atwater Market	22%	↑	19%	25%	19%	23%	22%	23%	↓	23%	25%	↑	21%
Costco	11%	10%	13%	14%	10%	10%	↑	9%	11%	14%	8%	↓	11%



of Visits in Past Month



Q2. Over the past month, how many times did you visit Greene Avenue or the Victoria / Village area for any purpose (ie. shopping, dining, banking, entertainment, etc.)?





of Visits in Past Month - Detail



Q2. Over the past month, how many times did you visit Greene Avenue or the Victoria / Village area for any purpose (ie. shopping, dining, banking, entertainment, etc.)?

Average # Visits	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
	n=931												
Victoria Village	6.5	6.8	8.7 ↑	5.1	8.0 ↑	5.5	6.0	7.0 ↑	6.4	6.6	6.7	6.3	6.7
Greene Avenue	5.4	5.1	3.7 ↓	6.7	3.9 ↓	7.5	5.2	5.9 ↑	4.8 ↓	5.7	6.0	5.2	5.8



REASONS FOR VISITING SHOPPING AREAS



LEARNING: While the impetus is multi-factorial, residents first and foremost visit the respective shopping areas because they find it convenient to do so.

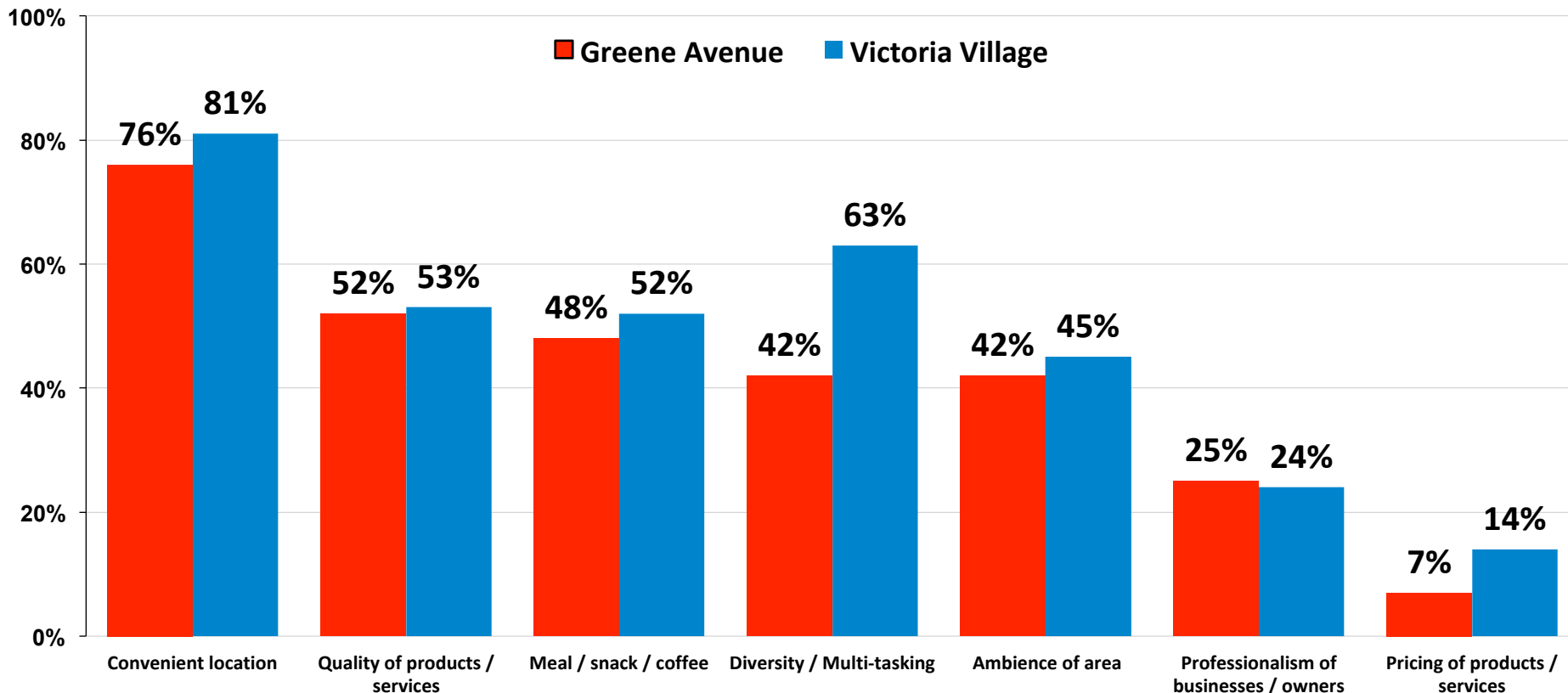
- The large majority of those who visit the respective shopping areas are motivated to do because they find their locations to be convenient (81% for Victoria Village; 76% for Greene Avenue).
 - While mentioned by noteworthy percentages of residents, the importance of all other factors is secondary and more or less equivalent across the two shopping areas.
 - The sole exceptions: the ability to multi-task or accomplish a diversity of things, and pricing, both of which are more strongly associated with Victoria Village than Greene Avenue.
 - Perhaps unsurprisingly, those living east of Metcalfe tend to be more driven toward Greene Avenue based on convenience than those living west of Metcalfe.
 - Women more so than men are more motivated to visit both areas for the quality of products and services found there, as well as – particularly for Victoria Village – diversity and the ability to multi-task.
 - Amongst the relatively few who had not visited Greene Avenue or Victoria Village within the preceding month, the absence of preferred businesses is the main issue; secondarily, perceived inconvenience.
-



Reasons For Visiting Shopping Area Within Past Month



Q3/5. From the following list, please select all that apply as reasons for which you visited the ... shopping area within the past month.





Reasons For Visiting Greene Avenue Within Past Month - Detail



Q3/5. From the following list, please select all that apply as reasons for which you visited the ... shopping area within the past month.

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A	B	C	D	E	Male	Female	<45	45-64	65+	French	English
	n=854	n=66	n=137	n=141	n=173	n=321	n=307	n=534	n=146	n=362	n=332	n=136	n=730
	79%	62%	60%	92% ↑	67%	92% ↑	77%	82%	79%	80%	81%	79%	80%
Convenient location													
Quality of products / services	52%	58%	47%	50%	49%	59% ↑	49%	57% ↑	52%	52%	57%	51%	54%
Meal / snack / coffee	48%	47%	39%	52%	44%	57% ↑	49%	50%	42% ↓	48%	54%	40%	51% ↑
Diversity / multi-tasking	42%	42%	27% ↓	56%	36% ↓	55% ↑	37%	52% ↑	30% ↓	44%	58%	38%	48% ↑
Ambience of area	42%	35%	36%	44%	39%	51% ↑	44%	43%	38%	44%	45%	51%	42%
Professionalism	25%	20%	22%	25%	23%	30%	26%	26%	22%	24%	30%	35%	24% ↓
Pricing	7%	11%	2%	6%	4%	12%	6%	9%	3%	7%	11%	10%	8%



Reasons For Visiting Victoria Village Within Past Month - Detail



Q3/5. From the following list, please select all that apply as reasons for which you visited the ... shopping area within the past month.

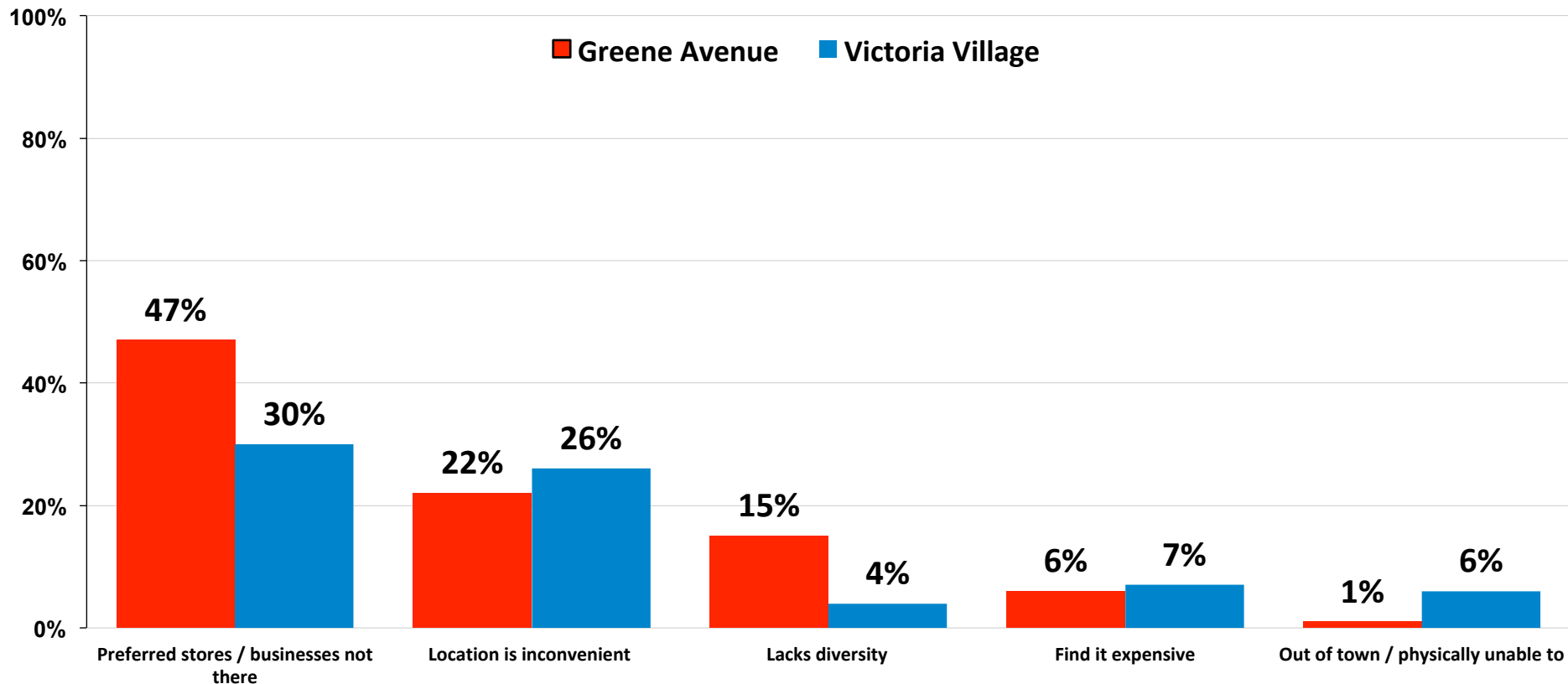
	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A	B	C	D	E	Male	Female	<45	45-64	65+	French	English
	n=861	n=68	n=153	n=128	n=199	n=294	n=306	n=538	n=153	n=363	n=326	n=137	n=730
Convenient location	81%	63% ↓	94%	80%	91%	74% ↓	81%	82%	80%	81%	83%	77%	83%
Diversity / multi-tasking	63%	66% ↓	75%	63%	72%	59% ↓	58%	72% ↑	55%	67%	74%	67%	67%
Quality of products / services	56%	68%	58%	54%	60%	59%	51%	64% ↑	48% ↓	60%	63%	58%	59%
Meal / snack / coffee	52%	47%	59% ↑	44%	55% ↑	47%	47%	53%	59%	53%	45%	50%	51%
Ambience of area	45%	41%	54% ↑	31%	56% ↑	40%	44%	46%	46%	46%	45%	48%	45%
Professionalism	24%	24%	32% ↑	17% ↓	28%	23%	22%	26%	21%	26%	26%	40%	22% ↓
Pricing	14%	19%	8% ↓	11%	17%	16%	14%	15%	8%	12%	21% ↑	14%	15%



Reasons For Not Visiting Shopping Area Within Past Month



Q4/6. From the following list, please select all that apply as reasons for which you did not visit the ... shopping area within the past month.





ONLINE SHOPPING & LOCAL SHOPPING IMPACT



LEARNING: Westmount residents are by and large active in terms of using the Internet to effect purchases. To-date, the impact of this activity upon Westmount's shopping areas is relatively minor.

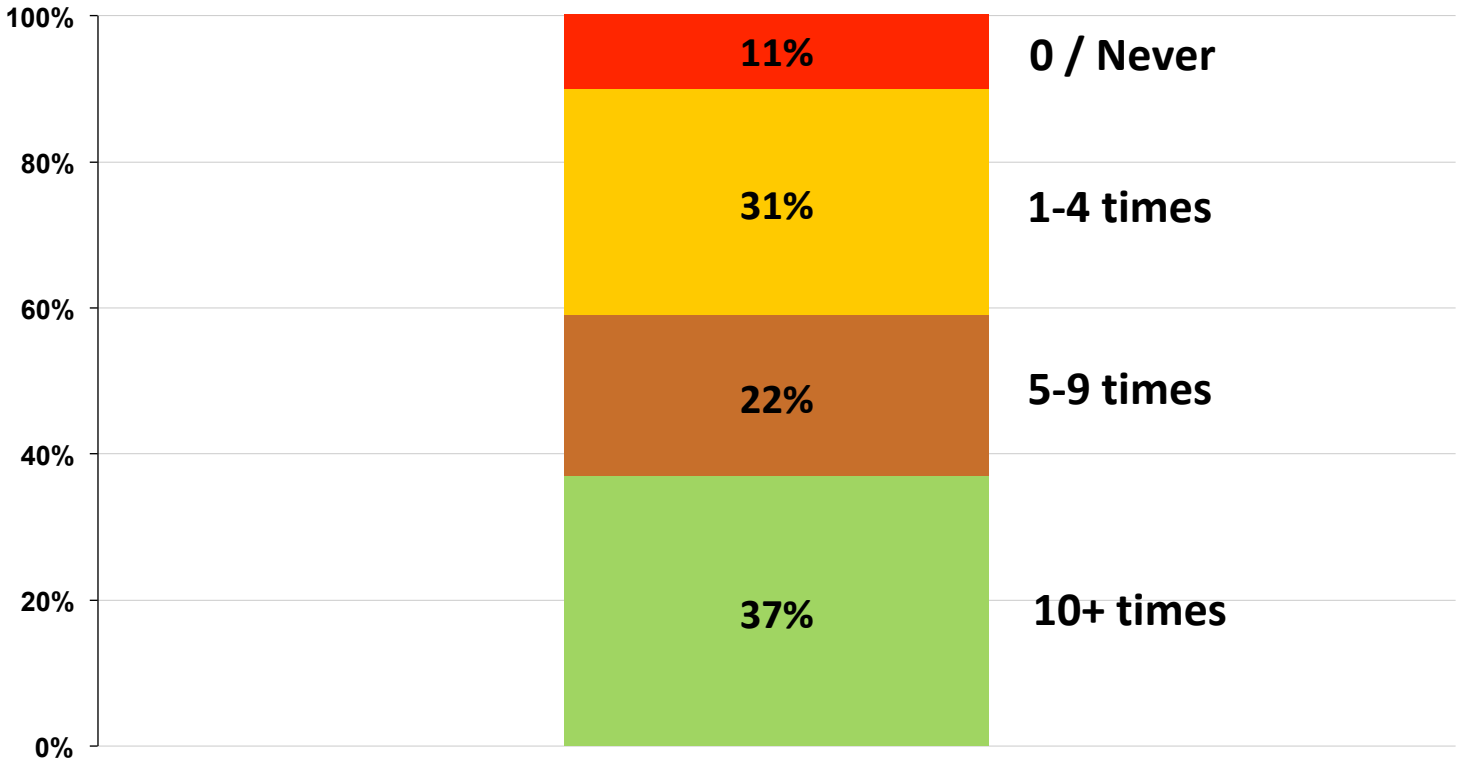
- With roughly 9-in-10 overall (89%) reporting have done so within the preceding six months, the vast majority of Westmounters have adopted the Internet as a means of purchasing products and services.
 - Moreover, this online behaviour is not an anomaly or one-off experience: the average number of purchases made online within the six months preceding the survey was 5.7, and more than 1-in-3 (37%) residents reported having made at least 10 or more purchases online within that same time frame.
 - Men appear to be more active than women with regard to making online purchases, as are younger residents compared to those aged 65+.
 - Amongst residents who do make purchases online, this behaviour is limited in terms of its impact upon Westmount's shopping areas. The large majority (77%) report that none of their online purchases within the past six months had the effect of eliminating a trip to one or the other of Westmount's shopping areas.
 - Amongst the relative few (23%) of those making purchases online, on average just under 1-in-10 trips to a Westmount shopping area were negatively impacted.
-



of Online Purchases in Past 6 Months



Q14. Over the past 6 months, how many times have you made purchases within any product or service category online?



Average: 5.7



of Online Purchases in Past 6 Months - Detail



Q14. Over the past 6 months, how many times have you made purchases within any product or service category online?

Average # Purchases	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=931	A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
5.7	5.7	5.6	6.1	5.6	5.1	5.4	6.0	5.0	6.8	6.0	4.1	5.3	5.4



Impact of Online Purchases on Westmount Shopping Areas



Q15. What percentage of these online purchases had the effect of eliminating the need for a trip to....

	Greene Avenue	Victoria Village
0% / none	77%	72%
100% / all	2%	2%
Average percentage of online purchases that eliminated a trip to...	8.6%	8.7%



LEARNINGS

Logistics



GETTING INFORMATION ABOUT SHOPPING AREAS



LEARNING: Westmount residents get information about the Greene Avenue and Victoria Village shopping areas principally via the Independent and secondarily businesses' websites and/or search engines like Google.

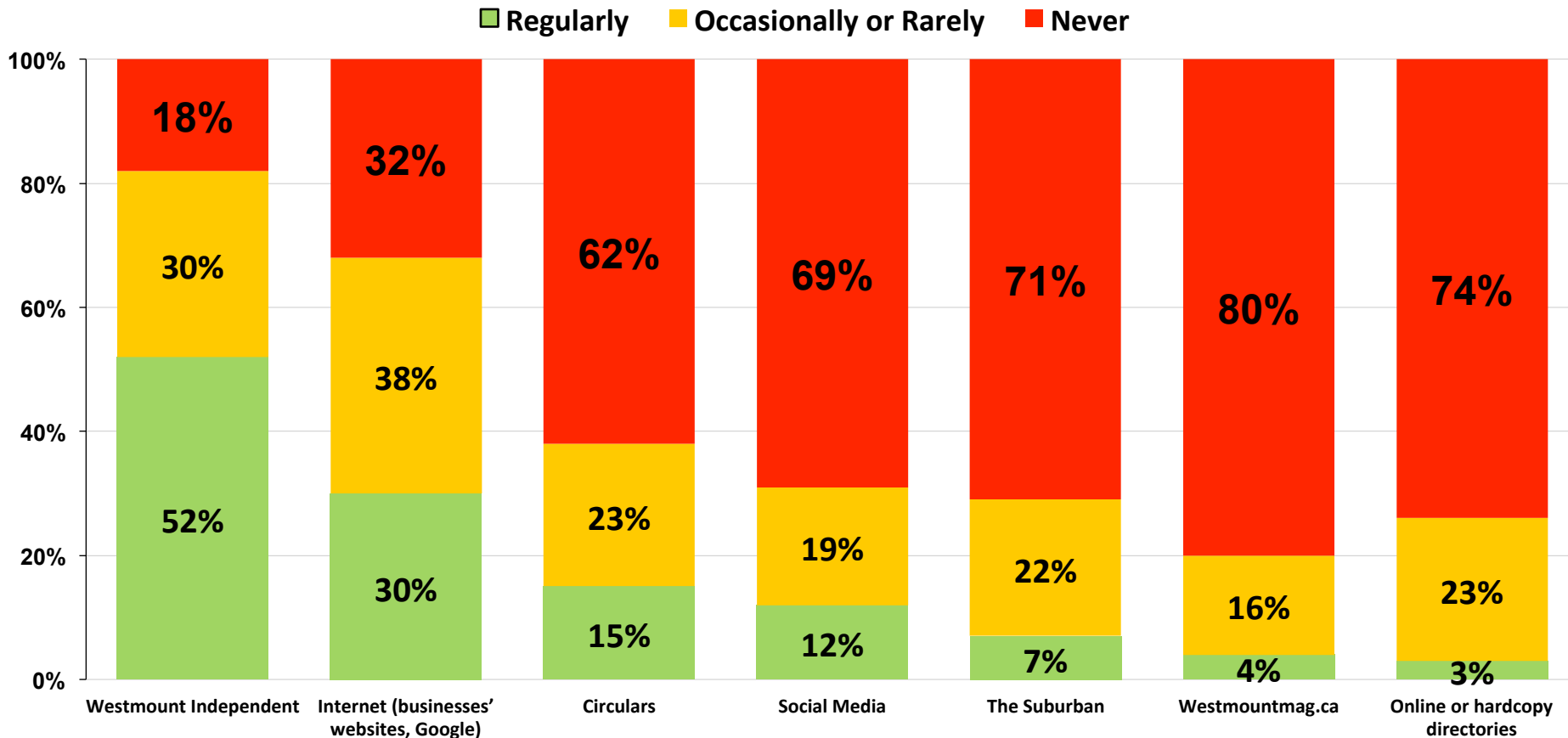
- Amongst a series of means assessed for the obtaining of information about the GA and VV shopping areas, only two surfaced with any appreciable regularity.
 - In first position is the Westmount Independent, which more than 1-in-2 (52%) claim to use regularly to obtain information local shopping information, and which only fewer than 1-in-5 (18%) actually *never* consult for that purpose.
 - Of next greatest prevalence is going online, either directly to businesses' website or searching for information on a business via a search engine. Roughly 2-in-3 (68%) do this either regularly or at least sometimes, whereas 1-in-3 (32%) never use the Internet in this manner.
 - Consultation of the Independent for local shopping area information is notably stronger amongst anglophones, women, those aged 45+, and more generally people residing directly in the VV area. In contrast, use of the Internet is more generalized, dipping in incidence only amongst those aged 65+.
-



Information Sources For Local Businesses



Q18. How often do you consult each of the following for information concerning businesses in the Westmount area?





Information Sources For Local Businesses - Detail



Q18. How often do you consult each of the following for information concerning businesses in the Westmount area?

Consult Regularly	TOTAL n=931	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Westmount Independent	52%	54%	53%	51%	64% ↑	54%	47%	61% ↑	41% ↓	59%	59%	49%	57% ↑
Internet (websites, Google)	30%	30%	27%	22%	31%	28%	28%	25%	42%	30%	16% ↓	26%	27%
Circulars	15%	13%	14%	18%	17%	15%	14%	17%	10%	14%	22% ↑	14%	16%
Social Media	12%	10%	12%	7%	15%	8%	10%	10%	20%	11%	3% ↓	7%	10%
The Suburban	7%	8%	5%	7%	8%	10%	6%	10%	1% ↓	9%	10%	8%	8%
Westmountmag.ca	4%	4%	4%	3%	5%	5%	3%	5%	5%	5%	3%	3%	5%
Online / hardcopy directories	3%	4%	4%	1%	3%	4%	3%	4%	2%	4%	4%	3%	4%



GETTING TO WESTMOUNT'S SHOPPING AREAS



FINDING: With only nominal exception, Westmount's two shopping areas are accessed either on foot or by car.

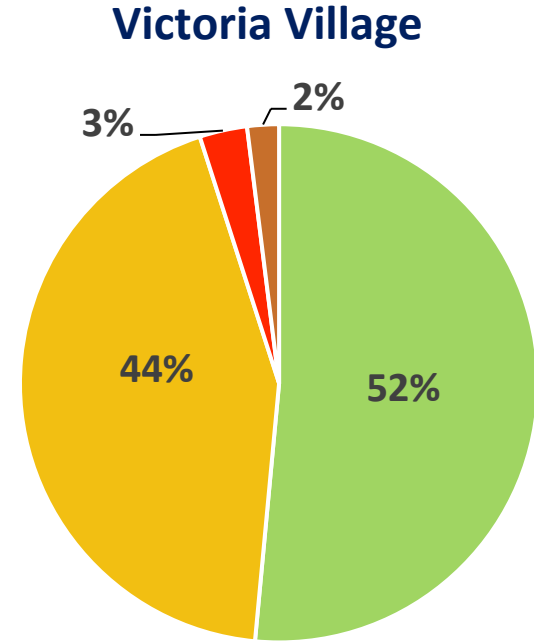
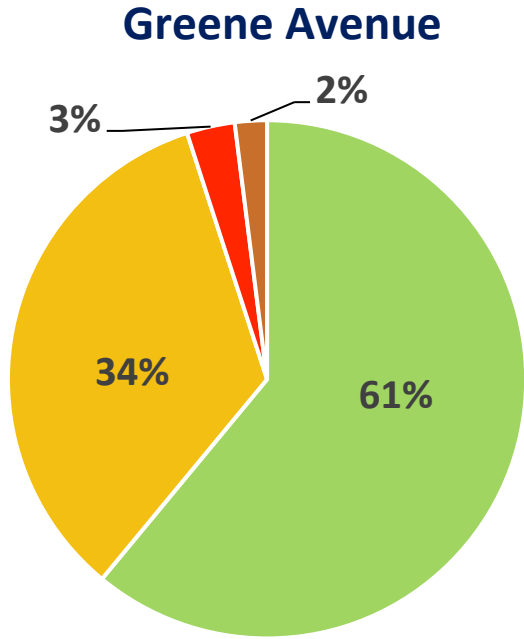
- The vast majority of residents access usually both the Greene Avenue and Victoria Village shopping areas by one of two means: by foot or by car.
 - Access to Victoria Village is close to equally divided between walking and one's car. In contrast, the proportion of residents that access the Greene Avenue area on foot is close to double that those who go there by car.
 - Residents who live above The Boulevard are significantly less likely to walk to either area, compared to residents living elsewhere (and are conversely the most inclined to go by car).
 - Interestingly, older (65+) residents are the segment most inclined to walk to Greene Avenue.
 - In contrast, younger (<45) residents are the group most inclined to walk to the Victoria Village shopping area, as are also those living west of Metcalfe.
-



Usual Mode of Transport



Q8. What mode of transport do you typically use when going to....



- Walking
- Car
- Bicycle
- Public transit



Usual Mode of Transport - Detail



Q8. What mode of transport do you typically use when going to....

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A	B	C	D	E	Male	Female	<45	45-64	65+	French	English
Greene Avenue	n=785	n=63	n=113	n=133	n=156	n=310	n=282	n=496	n=133	n=337	n=310	n=125	n=675
Walking	61%	24% ↓	25% ↓	71%	49%	85%	60%	64%	58%	59%	68% ↑	63%	62%
Car	34%	75%	73%	26%	41%	12% ↓	35%	32%	34%	38%	28% ↓	30%	34%
Bicycle	3%	2%	2%	1%	5% ↑	2%	3%	2%	6% ↑	1%	2%	3%	2%
Public transit	2%	0%	1%	2%	4%	2%	2%	2%	2%	1%	3%	3%	2%
Victoria Village	n=814	n=64	n=153	n=117	n=193	n=268	n=292	n=504	n=142	n=345	n=312	n=129	n=693
Walking	52%	14% ↓	62% ↑	34%	78% ↑	37%	48%	51%	61% ↑	50%	45%	60%	48%
Car	44%	86% ↑	37%	58%	18% ↓	57%	49%	44%	36% ↓	47%	49%	36%	47%
Bicycle	3%	0%	1%	2%	3%	4%	2%	2%	4%	2%	2%	2%	2%
Public transit	2%	0%	0%	6%	1%	3%	1%	3%	0%	1%	4%	2%	2%



PASSPORT CANADA APP USAGE & SATISFACTION



FINDING: Use of the Passport Canada app on a regular or even occasional basis shows much room for growth, with close to half of Westmounters reporting that they never use it at all when getting about by car in either shopping area. Those that do use it are generally satisfied.

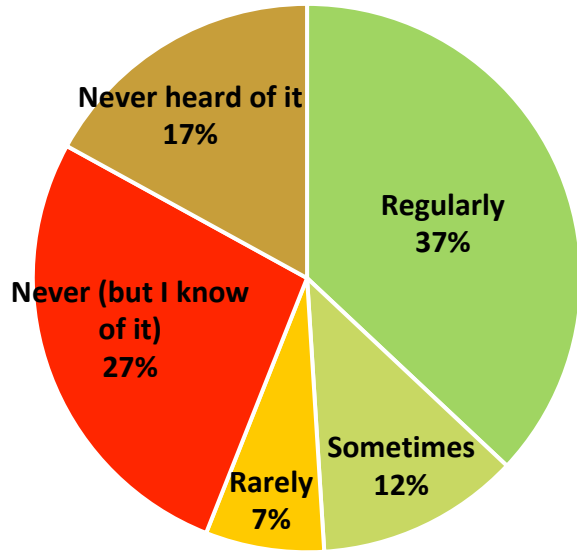
- Combined, those that use the Passport Canada app either regularly or at least sometimes account for roughly half (49%) of all those who usually travel by car to either of Westmount's shopping areas.
 - Notably, close to 1-in-5 (17%) have never heard of the app, and an additional 1-in-4 (27%) never use it, despite being aware of it. Together, these figures suggest an opportunity for augmented communications to both build awareness and, amongst the latter group, trial. Perhaps unsurprisingly, though, both the “never heard” and “never use” groups are disproportionately composed of residents aged 65+, which may represent a steeper challenge to converting toward use of the app than younger residents.
 - Users of the Passport Canada app are generally satisfied with their experience to-date – half of them (46%) strongly so. Only a nominal 1-in-20 (6%) are strongly dissatisfied, which reinforces once again that the key challenge for the app is in building awareness and trial as opposed to looking for way to improve it (and, thereby, satisfaction).
-



Passport Canada App Usage



Q9. How often do you use the Passport Canada app when visiting either of Westmount's shopping areas by car?



Base: Respondents who usually travel by car to either or both of the two shopping areas (n=466).



Passport Canada App Usage - Detail



Q9. How often do you use the Passport Canada app when visiting either of Westmount's shopping areas by car?

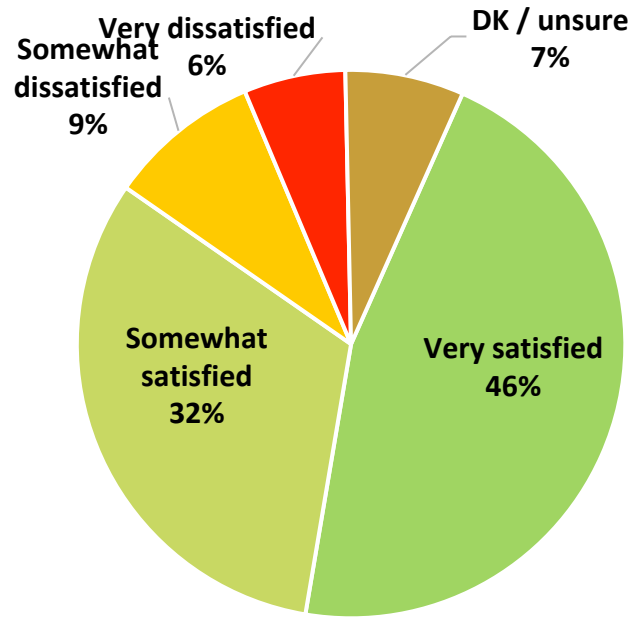
	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=466	A n=62	B n=96	C n=74	D n=77	E n=160	Male n=179	Female n=292	<45 n=70	45-64 n=215	65+ n=187	French n=69	English n=413
Regularly	37%	44%	38%	38%	35%	28% ↓	32%	36%	57%	42%	18% ↓	32%	34%
Sometimes	12%	13%	9%	11%	14%	11%	15%	10%	10%	12%	13%	9%	12%
Rarely	7%	5%	6%	4%	5%	9%	8%	5%	6%	5%	10%	13%	6%
Never (but I know of it)	27%	26%	30%	36%	23%	31%	26%	32%	16%	25%	38% ↑	22%	31%
Never heard of it	17%	13%	17%	11%	22%	21%	20%	17%	11%	17%	22% ↑	25%	17%



Satisfaction With Passport Canada App



Q10. Generally, how satisfied are you with the Passport Canada app?





Satisfaction With Passport Canada App - Detail



Q10. Generally, how satisfied are you with the Passport Canada app?

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=260	A n=38	B n=51	C n=39	D n=42	E n=77	Male n=98	Female n=151	<45 n=51	45-64 n=125	65+ n=75	French n=37	English n=215
Very satisfied	46%	42%	39%	54%	48%	49%	45%	48%	47%	46%	45%	49%	46%
Somewhat satisfied	32%	37%	37%	33%	31%	25%	30%	31%	37%	33%	25%	27%	32%
Somewhat unsatisfied	9%	5%	12%	3%	10%	13%	12%	8%	6%	11%	9%	11%	9%
Very unsatisfied	6%	8%	8%	3%	10%	3%	8%	4%	4%	6%	7%	5%	6%
Don't know / unsure	6%	8%	4%	8%	2%	10%	5%	9%	6%	4%	13%	8%	7%



Base: Respondents who use the app regularly, sometimes, or rarely (n=260).



LEARNINGS

Perceptions & Opinions



PERSPECTIVE ON LOCAL BUSINESS



LEARNING: As a rule, Westmounters prefer either to shop with a local merchant - or have no preference one way or the other versus chains or foreign franchises.

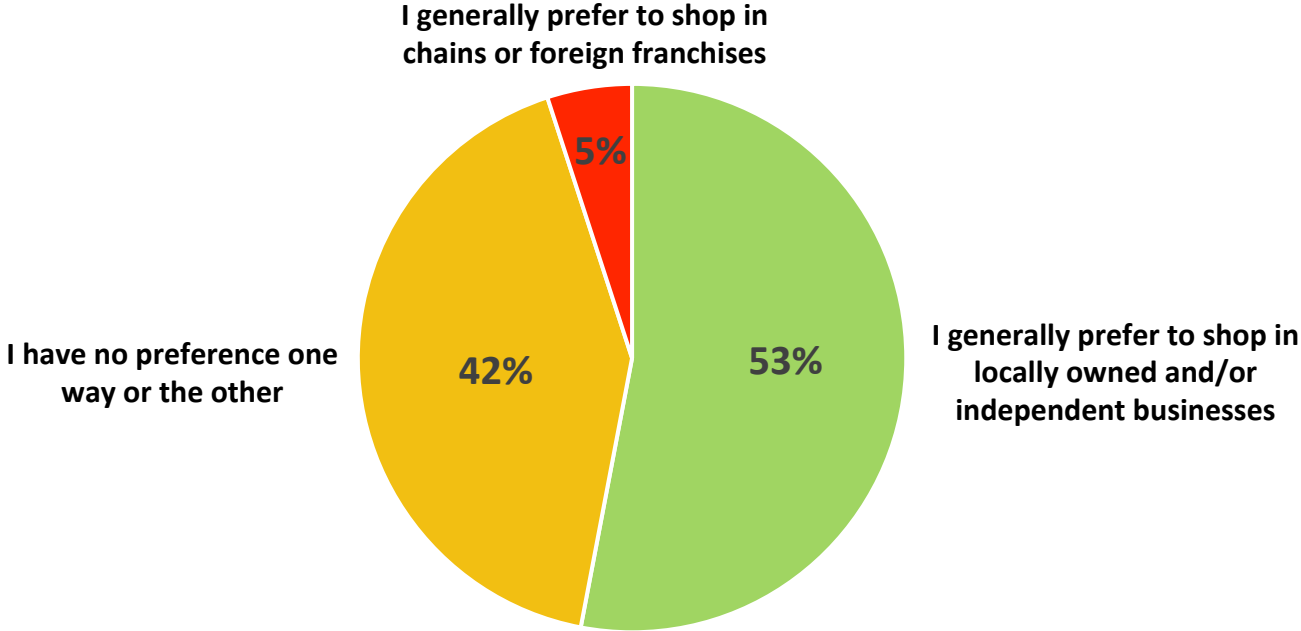
- Residents are effectively divided between those who favour doing business with a local merchant over a chain (53%) and those who do not have a preference one way or the other (42%).
 - Only a nominal few (5%) actually prefer to shop at a chain or international store. Notably, this proportion is higher amongst younger residents (9% amongst those aged < 45 years). And, while they do not actively prefer shopping at chain stores at a higher rate than residents living in other areas of Westmount, those who live above The Boulevard are more inclined than those living elsewhere to not have a preference one way or the other.
 - Whatever their preference - or lack thereof - on this point, residents are firmly united both in the view that the businesses in Westmount's shopping areas contribute in an important way to the local quality of life (96%) and that the City's adopting of policies and programs which favour / support businesses located in its shopping areas is appropriate (93%).
-



Shopping Preference: Local/Independent vs. Chain



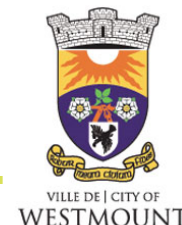
Q19. Which of the following statements best reflects your general shopping preference?



Base: All respondents.



Shopping Preference: Local/Independent vs. Chain - Detail



Q19. Which of the following statements best reflects your general shopping preference?

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Prefer to shop locally owned / independent	53%	39% ↓	63%	53%	62%	51%	53%	58%	45% ↓	57%	60%	50%	57%
No preference one way or the other	42%	58%	33% ↓	46%	33% ↓	43%	43%	38%	46% ↑	40%	36%	46%	39%
Prefer to shop chains or foreign franchises	5%	3%	4%	1%	5%	6%	4%	4%	9% ↑	3%	4%	5%	4%

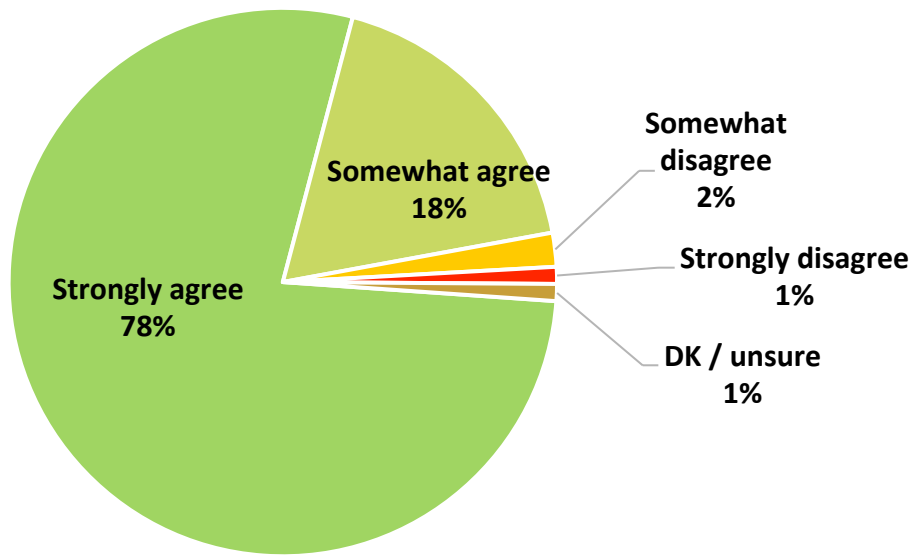


Contribution Of Local Businesses To Neighbourhood Quality of Life



Q13. To what extent do you agree with the following statement?

“The businesses in Westmount’s shopping areas make an important contribution to the neighbourhood quality of life.”



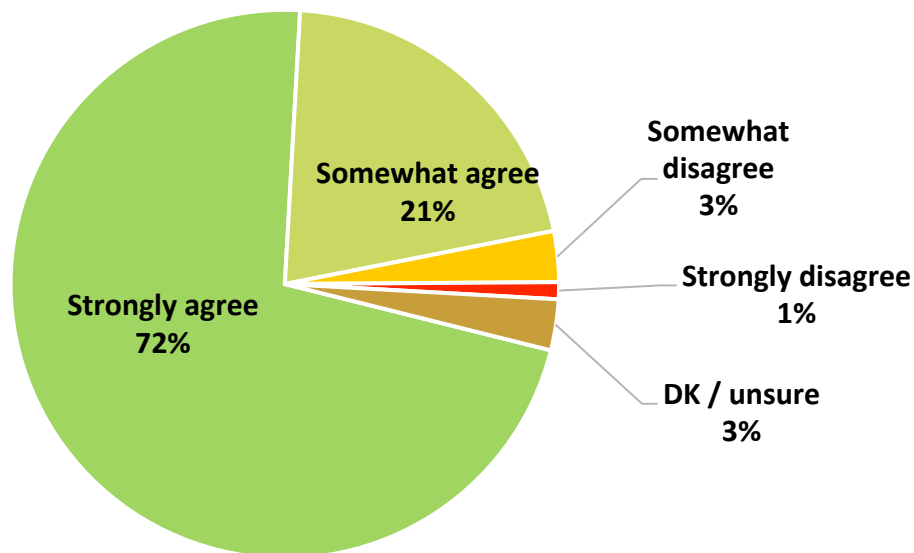


Propriety of City Supporting Local Businesses



Q13. To what extent do you agree with the following statement?

“It is appropriate for the City of Westmount to adopt policies and programs which favour / support businesses located in its shopping areas.”






Opinions Regarding Local Businesses - Detail



Q13. Please indicate the extent to which you agree with the following statements.

Strongly or Somewhat Agree	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
The businesses in Westmount’s shopping areas make an important contribution to the neighbourhood quality of life.	96%	97%	95%	97%	96%	97%	96%	97%	97%	96%	97%	95%	97%
It is appropriate for the City of Westmount to adopt policies and programs which favour / support businesses located in its shopping areas.	93%	97% 	90%	95%	92%	94%	94%	94%	92%	93%	95%	93%	94%



PERCEPTIONS OF THE SHOPPING AREAS



LEARNING: With only nominal dissent, Westmount residents find both shopping areas to be safe and offer a pleasant ambience. Parking, on the other hand.....

- Westmounters are nearly unanimous (95%+) in their perception that both the Greene Avenue and Victoria Village shopping areas are safe.
 - Agreement approaches a similarly strong level (9-in-10) with regard to the ambience of the two shopping areas being pleasant.
 - Though still in majority territory, opinion is clearly more divided with regard to whether a good balance has been struck between local businesses and chain stores – a point that applies in both shopping areas.
 - Opinion most diverges between Greene Avenue and Victoria Village with regard to perceived diversity / variety of shopping. Both are again in majority territory, but Victoria Village holds a significant lead over Greene Avenue, whereas residents living west of Metcalfe and those aged less than 65 years are notably less satisfied with Greene Avenue on this point.
 - The Achilles' heel of both shopping areas comes down to parking, with fewer than 1-in-3 residents agreeing that it is easy to find do so in either area.
-

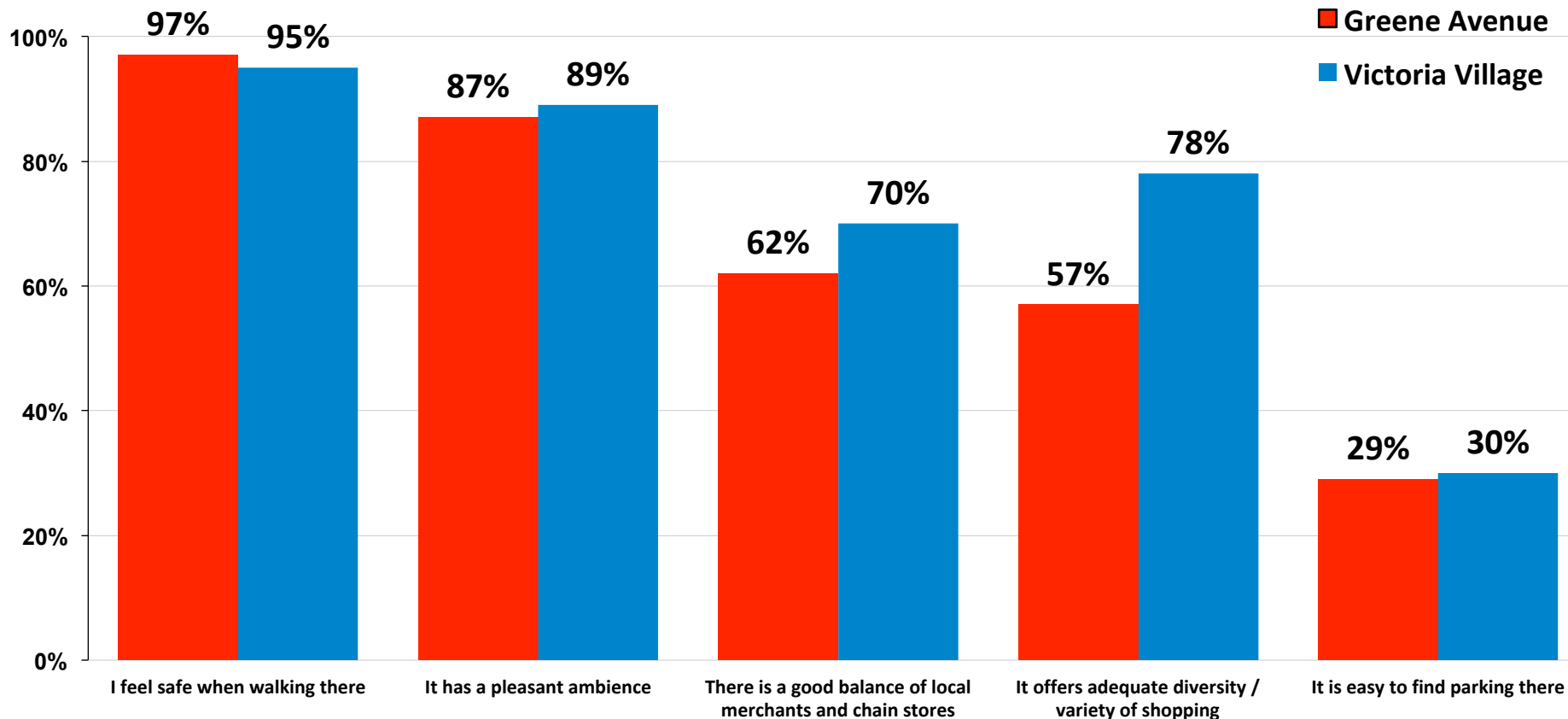


Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“Strongly or Somewhat Agree”





Perceptions Of Greene Avenue - Detail



Q11/12. Please indicate the extent to which you agree with the following statements.

Strongly or Somewhat Agree	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A	B	C	D	E	Male	Female	<45	45-64	65+	French	English
	n=931 97%	n=71 96%	n=155 97%	n=146 98%	n=202 95%	n=327 98%	n=338 97%	n=567 97%	n=168 95%	n=384 97%	n=353 97%	n=153 96%	n=778 97%
Feel safe there	97%	96%	97%	98%	95%	98%	97%	97%	95%	97%	97%	96%	97%
Pleasant ambience	87%	85%	82%	91% ↑	84%	91% ↑	88%	87%	84%	85%	91% ↑	88%	88%
Good balance, local vs chain businesses	62%	58%	57%	75% ↑	57%	65%	63%	63%	61%	64%	61%	66%	62%
Adequate diversity / variety of shopping	57%	66%	52% ↓	62%	54% ↓	63%	57%	61%	50%	55%	68% ↑	53%	60%
Easy to find parking there	30%	25%	29%	29%	30%	31%	33%	28%	26%	35% ↑	27%	34%	29%



Perceptions Of Victoria Village - Detail



Q11/12. Please indicate the extent to which you agree with the following statements.

Strongly or Somewhat Agree	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Feel safe there	n=931 95%	99% ↑	99% ↑	94%	97%	94%	94%	97%	95%	97%	95%	95%	96%
Pleasant ambience	89%	87%	93%	88%	91%	87%	86%	92% ↑	88%	90%	90%	88%	90%
Good balance, local vs chain businesses	70%	76%	70%	73%	67%	70%	69%	71%	70%	72%	69%	78% ↑	68%
Adequate diversity / variety of shopping	78%	85%	81%	75%	82%	79%	79%	82%	73%	80%	85% ↑	84%	79%
Easy to find parking there	30%	25%	35% ↑	25%	29%	30%	32%	29%	29%	31%	29%	30%	30%



Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“I feel safe when walking there.”

	Greene Avenue	Victoria Village
Net Agree	97%	95%
Strongly agree	82%	78%
Somewhat agree	15%	18%
Net Disagree	1%	2%
Somewhat disagree	1%	1%
Strongly disagree	0%	0%
Don't know / unsure	2%	3%



Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“It has a pleasant ambience.”

	Greene Avenue	Victoria Village
Net Agree	87%	89%
Strongly agree	46%	45%
Somewhat agree	41%	44%
Net Disagree	11%	8%
Somewhat disagree	9%	6%
Strongly disagree	2%	2%
Don't know / unsure	2%	3%



Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“There is a good balance between local merchants / businesses and chain stores.”

	Greene Avenue	Victoria Village
Net Agree	62%	70%
Strongly agree	21%	26%
Somewhat agree	41%	44%
Net Disagree	28%	23%
Somewhat disagree	19%	18%
Strongly disagree	9%	5%
Don't know / unsure	9%	7%



Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“It offers adequate diversity / variety of shopping.”

	Greene Avenue	Victoria Village
Net Agree	57%	78%
Strongly agree	16%	31%
Somewhat agree	41%	47%
Net Disagree	40%	18%
Somewhat disagree	27%	12%
Strongly disagree	13%	5%
Don't know / unsure	3%	4%



Perceptions Of Westmount's Business Arteries



Q11/12. Please indicate the extent to which you agree with the following statements.

“It is easy to find parking there.”

	Greene Avenue	Victoria Village
Net Agree	30%	30%
Strongly agree	6%	6%
Somewhat agree	23%	24%
Net Disagree	51%	52%
Somewhat disagree	27%	30%
Strongly disagree	24%	22%
Don't know / unsure	19%	18%



THE SHOPPING AREAS: TRENDING BETTER OR WORSE?



LEARNING: Most residents do not see a difference for better or for worse in the business dynamic in either the Greene Avenue or Victoria Village shopping areas. Amongst those that do, the weight of opinion is toward a decline.

- A large proportion of Westmount residents (41%) believe that the business dynamic in both the Greene Avenue and Victoria Village shopping areas is more or less unchanged compared to a year ago. Adding to these the additional 15% who say they are uncertain (and who therefore arguably don't perceive a difference one way or the other), more than half of Westmounters think that the “vibe” in both areas is, more or less, status quo.
 - Amongst the remainder, the balance of opinion weighs toward a decline in business dynamic (28% saying decline for Greene Avenue, 26% for Victoria Village, versus fewer than 20% seeing an improvement in either area).
 - Westmounters living west of Metcalfe have a more negative perspective on the current business dynamic in Victoria Village compared to those living toward the east.
-

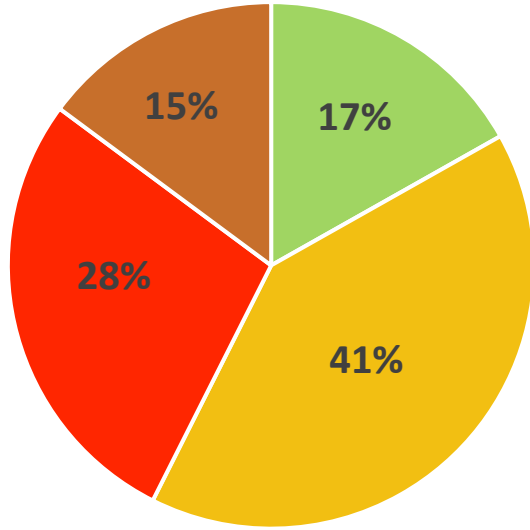


Perception of Area Versus A Year Ago

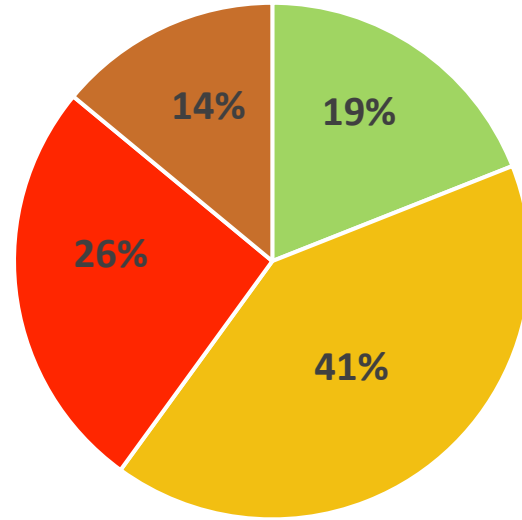


Q7. How do you feel the business dynamic or “vibe” in the two areas to be today compared to a year ago?

Greene Avenue



Victoria Village



- Better
- The same
- Worse
- DK / unsure



Perception of Area Versus A Year Ago - Detail



Q7. How do you feel the business dynamic or “vibe” in the two areas to be today compared to a year ago?

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=931	A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Greene Avenue													
Better	17%	21%	12% ↓	21%	16%	19%	19%	17%	12%	24% ↑	14%	18%	17%
The same	41%	31%	42%	47%	34%	40%	42%	38%	44%	35%	41%	39%	40%
Worse	28%	37% ↑	28%	23%	27%	32% ↑	27%	30%	25%	31%	30%	28%	29%
Don't know / unsure	15%	11%	19%	9%	23% ↑	9%	12%	15%	19% ↑	10%	14%	15%	14%
Victoria Village													
Better	19%	24%	28%	16% ↓	20% ↓	14%	17%	20%	18%	22%	16%	21%	19%
The same	41%	39%	37%	41%	38%	44%	46% ↑	37%	38%	41%	42%	44%	40%
Worse	26%	28%	32% ↑	24%	35% ↑	19%	22%	29% ↑	28%	27%	25%	22%	28%
Don't know / unsure	14%	8%	3%	19% ↑	7%	22% ↑	14%	13%	17%	10% ↓	16%	12%	14%



STIMULATING SHOPPING AREA VISITS



LEARNING: Creating opportunities for residents to socialize over a bite and/or drink is the most potent means of stimulating interest in visiting Westmount's shopping areas.

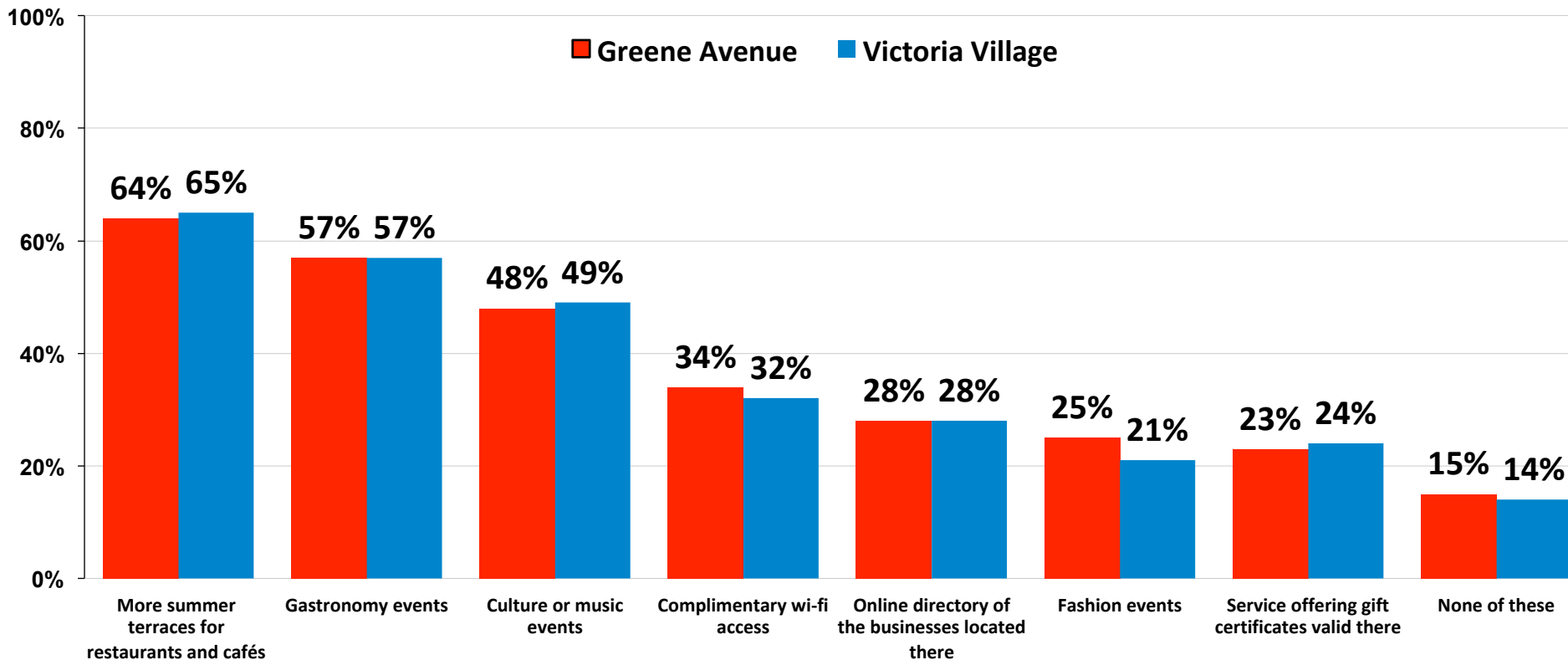
- Amongst a series of ideas tested to stimulate interest in visiting either of Westmount's shopping areas, residents were most enthusiastic about the prospect of an increased number of summer terraces for restaurants and bars – for both GA and VV (64% and 65% respectively). Of second greatest interest, still on the same theme: gastronomy events (57% for both GA and VV), followed by music and cultural events (48% and 49% respectively).
 - Importantly, other ideas assessed all showed a roughly equivalent degree of interest across both shopping areas – suggesting that residents are not necessarily looking for one area to fulfil one type of role or function, and the other another.
 - While interest in the above ideas is fairly widespread, it nonetheless was least evident amongst older (65+) residents, both for the Greene Avenue and Victoria Village shopping areas – whereas residents living west of Metcalfe were consistently more interested in them specifically as devices to stimulate interest in visiting Victoria Village as opposed to Greene Avenue.
-



Increasing The Likelihood Of Visiting Shopping Area



Q16. Which of the following would increase your likelihood of visiting the Greene Avenue or Victoria Village shopping areas were they to be offered or organized there?





Increasing Likelihood of Visiting Greene Avenue Shopping Area - Detail



Q16. Which of the following would increase your likelihood of visiting the Greene Avenue shopping area were they to be offered or organized there?

	TOTAL n=931	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
More summer terraces for restaurants / cafes	64%	59%	63%	60%	59%	67%	62%	63%	72%	70%	50% ↓	69%	61%
Gastronomy events	57%	52%	54%	52%	54%	57%	55%	54%	67%	59%	44% ↓	58%	54%
Culture or music events	48%	39%	45%	44%	45%	51%	46%	47%	54%	48%	42% ↓	47%	46%
Complimentary wifi access	34%	31%	32%	30%	35%	37%	42% ↑	29%	32%	34%	32%	38%	33%
Online directory of businesses located there	28%	23%	23%	28%	26%	32% ↑	28%	27%	29%	26%	30%	28%	28%
Fashion events	25%	27%	23%	23%	22%	27%	18%	29% ↑	32%	27%	19% ↓	33%	23%
Service offering gift certificates valid there	23%	18%	21%	23%	20%	29% ↑	19%	27% ↑	23%	25%	23%	19%	25%
None of these	15%	14%	20%	18%	17%	12%	17%	16%	11%	12%	22% ↑	14%	17%



Increasing Likelihood of Visiting Victoria Village Shopping Area - Detail



Q16. Which of the following would increase your likelihood of visiting the Victoria Village Avenue shopping area were they to be offered or organized there?

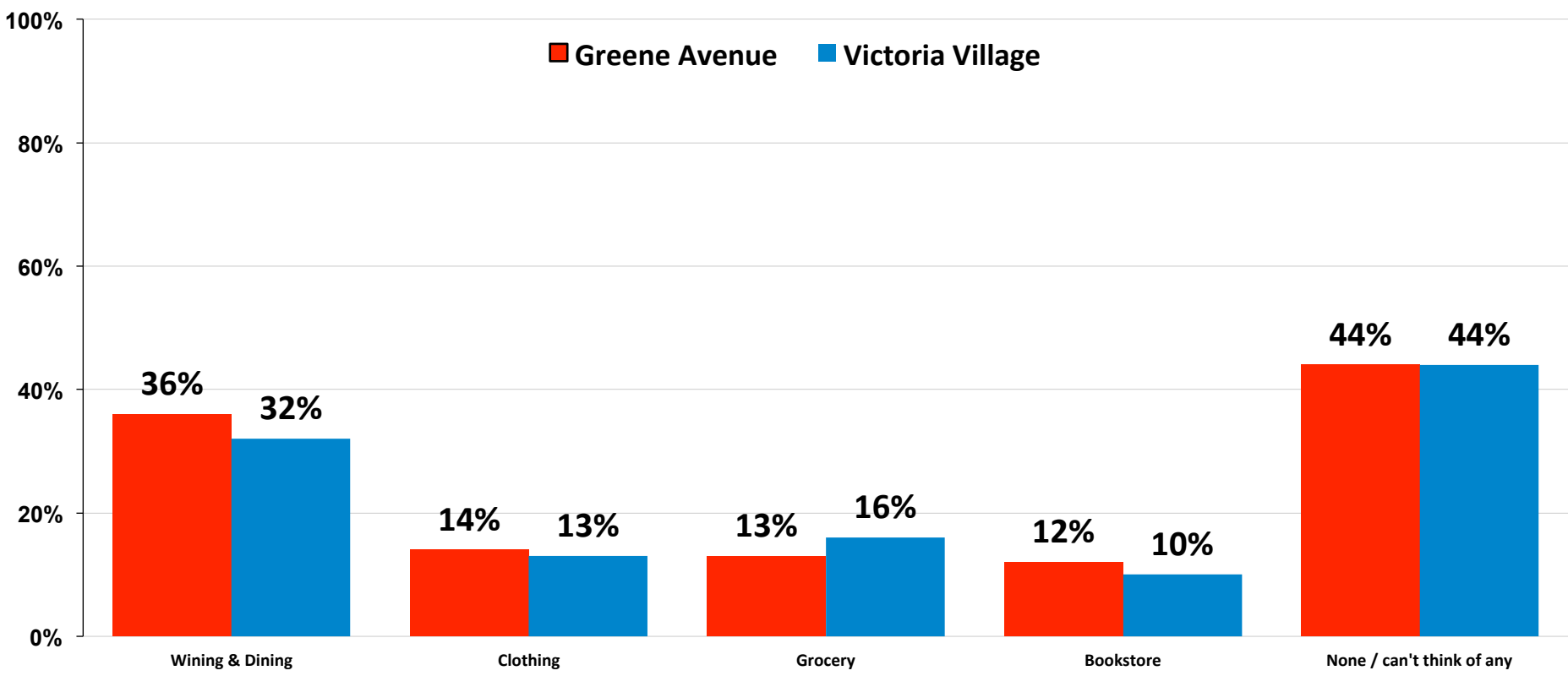
	TOTAL n=931	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
		A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
More summer terraces for restaurants / cafes	65%	56%	72% ↑	55%	72% ↑	59%	65%	62%	72%	72%	50% ↓	71%	62%
Gastronomy events	57%	54%	62% ↑	51%	64% ↑	48%	58%	53%	64%	62%	42% ↓	60%	53%
Culture or music events	49%	39%	55% ↑	41%	56% ↑	43%	47%	47%	55%	51%	41% ↓	50%	47%
Complimentary wifi access	32%	30%	37% ↑	23%	37% ↑	31%	39% ↑	28%	30%	33%	29%	37%	30%
Online directory of businesses located there	28%	21%	26%	28%	29%	29%	26%	27%	29%	27%	27%	29%	27%
Service offering gift certificates valid there	24%	18%	25%	24%	25%	24%	19%	28% ↑	24%	26%	23%	20%	25%
Fashion events	21%	17%	27%	17%	22%	20% ↑	16%	25% ↑	26%	25%	16% ↓	29%	20%
None of these	14%	14%	12%	23% ↑	8%	18%	14%	16%	10%	11%	23% ↑	14%	16%



To Increase Visits, Residents Suggest Something In The Category Of...



Q17. What businesses or services (or categories thereof) would increase your frequenting of the respective shopping areas were they to be introduced there?



Base: All respondents.



To Increase Visits To Greene Avenue, Residents Suggest Something In The Category Of..... - Detail



Q17. What businesses or services (or categories thereof) would increase your frequenting of the Greene Avenue shopping area were they to be introduced there?

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=931	A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Wining & Dining	36%	27% ↓	34%	31%	32%	40%	33%	35%	40%	43%	23% ↓	33%	35%
Clothing	14%	10%	13%	14%	12%	14%	12%	13%	17%	13%	11%	14%	12%
Grocery	13%	17%	8% ↓	14%	14%	16%	12%	16%	13%	18%	10%	17%	13%
Bookstore	12%	13%	12%	12%	10%	14%	8%	16% ↑	10%	13%	15%	12%	13%
None/can't think of any	44%	46%	51% ↑	45%	46%	39%	47%	43%	40%	36%	54% ↑	47%	44%



To Increase Visits To Victoria Village, Residents Suggest Something In The Category Of..... - Detail



Q17. What businesses or services (or categories thereof) would increase your frequenting of the Victoria Village shopping area were they to be introduced there?

	TOTAL	AREA OF WESTMOUNT					GENDER		AGE			LANGUAGE	
	n=931	A n=71	B n=155	C n=146	D n=202	E n=327	Male n=338	Female n=567	<45 n=168	45-64 n=384	65+ n=353	French n=153	English n=778
Wining & Dining	32%	21% ↓	43%	30%	36%	24%	32%	30%	35%	39%	20% ↓	26%	31%
Clothing	13%	13%	16%	7% ↓	19%	10%	9% ↓	15%	18%	13%	10%	12%	13%
Grocery	16%	18%	20%	12%	17%	13%	15%	15%	18%	18%	10%	17%	15%
Bookstore	10%	6%	15% ↑	7%	13% ↑	9%	5%	14% ↑	8%	11%	12%	12%	11%
None/can't think of any	44%	55%	32% ↓	54%	33% ↓	55%	48%	45%	36%	41%	56% ↑	51%	45%



CONCLUSIONS / KEY TAKEAWAYS



CONCLUSIONS / KEY TAKEAWAYS



The current research was undertaken to provide guidance to the City and its partner firm *Artères* as they collaborate on planning the future of Greene Avenue and Victoria Village, Westmount's business and shopping areas.

Key learnings and insights deriving from a representative survey of more than 900 Westmount residents are as follows:

1. *As a general observation, the challenges surrounding planning should be mitigated by Westmount residents looking largely alike on most themes that concern the business and shopping areas.*

Notwithstanding some exceptions – the most notably being differences in the opinions and behaviour of younger versus older (65+) residents - Westmounters are on balance quite uniform in their perceptions and behaviour associated with the two shopping areas, and are especially so with regard to their feelings about the importance of the role played by local businesses.

This general alignment within the population should simplify the planning task before the City and *Artères*.



CONCLUSIONS / KEY TAKEAWAYS



- Both the Victoria Village and Greene Avenue shopping areas are integral elements of residents' lives, owing principally to their convenience.*

A large majority of residents visit both shopping areas on a regular basis, multiple times per month – and close to half visiting Victoria Village 10 times or more per month, and roughly 1-in-3 doing the same with respect to Greene Avenue.

At such incidences, residents are visiting Westmount's shopping areas more frequently than they do anywhere else, and with a similar underpinning main motivation – convenience – and secondary motivations also to similar degrees.

The sole important point of differentiation between the two shopping areas in terms of motivation to visit is the greater diversity of offer and potential to multi-task associated with Victoria Village over Greene Avenue. A clear priority for planning around Greene Avenue would therefore be improving perceptions on this point.



CONCLUSIONS / KEY TAKEAWAYS



- 3. A minority of residents perceive both shopping areas to be on the decline, yet this outstrips perceptions that things are improving for the better.*

Given the frequency with which residents visit the two local shopping areas, it is especially important to take stock of perceptions surrounding their “health”.

On this point, close to half of Westmount residents think both shopping areas are more or less status quo versus a year ago in terms of their business dynamic.

The balance of opinion trends more toward the belief that things are on the decline as opposed to improving. While that amounts in statistical terms to only a minority of the overall population, it nevertheless merits attention from a planning perspective.



CONCLUSIONS / KEY TAKEAWAYS



- 4. Residents effectively access the two shopping areas in one of two ways: by foot or by car. Poor perceptions surrounding ease of parking are hence an irritant that beg attention.***

Results are clear in highlighting the point that Westmounters visit both shopping areas via one of two means: by car or by foot (the latter being especially prevalent as a means of getting to Greene Avenue).

Given the importance of transport by car, it is especially important to take stock of residents' poor perceptions surrounding ease of parking – and particularly so for Victoria Village area, which roughly half the population usually visits by car, and often with multi-tasking on the agenda (probably reinforcing the need for one's car).

To the extent possible, planning should attempt to address resident perceptions on this point.



CONCLUSIONS / KEY TAKEAWAYS



5. *Westmounters highly value their local businesses.*

Residents more or less unanimously see local businesses as making an important contribution to the local quality of life, and equally unanimously support the notion that the City should be active toward helping them succeed / thrive.

Backstopping these broadly-held opinions is the fact that only a nominal few – 5% - actively prefer shopping at a chain or foreign-owned store versus a local business.

Such broad support presents a clear “green light” for the City and its planning partner to develop strategies to support Westmount’s local businesses.



CONCLUSIONS / KEY TAKEAWAYS



- 5. The path to increased local shopping area visits lies mainly through addressing Westmounters' appetite for food, drink, and socializing.*

Amongst an array of suggested possibilities, residents zeroed in on increasing the number of sidewalk terraces for restaurants and cafés as the #1 means of increasing their likelihood of visiting both Greene Avenue and in Victoria Village.

The appeal of the above is underscored by residents' call, when asked openly, for more and/or better options with regard to local wining and dining, as well as their interest in events organized around the theme of gastronomy.

Taken in their ensemble, these findings clearly signal a perceived deficit on the part of Westmount residents – especially its younger ones - in terms of options to eat, drink, and socialize locally, and should play a key role in the City's planning and strategy with regard to its two shopping areas.



APPENDICES

Survey (English & French)
Data Crosstabulations



Survey English



Sondage Francais



Data
Crosstabulations