



THE PARTNERSHIP

Saskatoon Downtown Business Improvement District

2009

Pedestrian Study

Conducted May 6th to May 9th, 2009

And

May 20th to May 23rd, 2009

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Introduction

The Partnership conducted Pedestrian Studies every second year from 2001 to 2005. In 2005 *The Partnership* Board Management determined the importance of conducting studies annually, to monitor the changes in pedestrian traffic as major developments in Saskatoon near completion. River Landing, Persephone Theatre and the Galaxy Theatre are expected to have an influence on Downtown pedestrian traffic, as well as the recent growth in Downtown residential.

Pedestrian Counts are widely used in urban studies, as they provide clear and concise information. This data allows for direct conclusions to be made regarding the volume of pedestrian traffic and therefore the health of the Downtown business environment, including retail, professional, restaurants and the service sector.

The Partnership's pedestrian study is conducted on Wednesday afternoons, Thursday evenings, and Saturday afternoons. This year's count was performed during the weeks of May 6th to May 9th and May 20th to May 23rd, 2009. Conducting studies at similar times of the year provides *The Partnership* with a complete set of data for comprehensive comparison. The days of the study are chosen to convey the best comparison numbers of a normal day, as well as fall within the same general time frame as past studies. There were no holidays or events occurring during the weeks studied in 2009, 2008, 2007, 2006 or 2005. In 2003 and 2001, the Children's Festival occurred during the second week of the study.

The 6 count stations are located as follows:

Public Education Centre

Hotel Senator

American Apparel (Former Urban Barn location)

Squire Shop

Paramount Optical

Odeon Event Centre

100 block of 3rd Avenue South

200 block of 21st Street East

100 block of 21st Street East

100 block of 2nd Avenue North

100 block of 2nd Avenue South

200 block of 2nd Avenue South

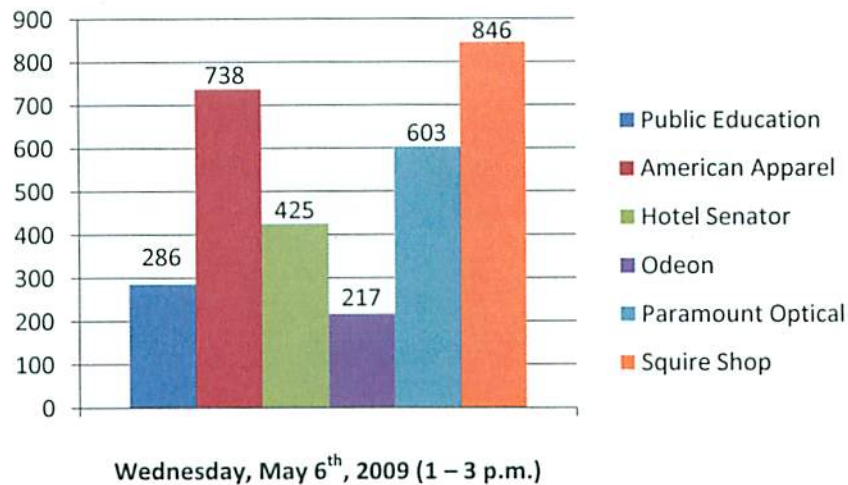
At the Public Education Centre and the Hotel Senator locations, the surveyors were positioned in front of the building, facing 21st Street East. The remaining surveyors were positioned facing the front of the respective buildings. Surveyors counted those who passed their station, in both directions: pedestrians on the opposite side of the street were not included in the count, nor were those who did not pass immediately in front of their station. Bicycles and children in strollers were also considered pedestrians.

As Downtown pedestrian activity may be affected by the weather, prevailing weather conditions were recorded.

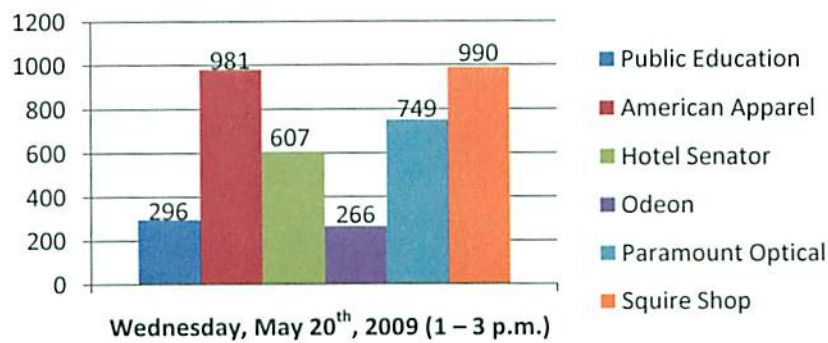
2009 DATA AND RESULTS

Wednesday Pedestrian Counts

Wednesday, May 6th was cloudy, with rain showers occurring the last hour of the pedestrian count. The temperature recorded at 1 p.m. was 7° C and decreased to 4° C by 3 p.m. The Squire Shop recorded the highest volume of pedestrian traffic. The lowest count was recorded at the Odeon Events Centre.



Wednesday, May 20th was partly cloudy and windy. The temperature was recorded at 6° C with winds blowing West at 28 km/h at 1 p.m. By 3 p.m. the wind had shifted to a North Eastern direction, but the temperature remained the same. Once again the Squire Shop received the highest volume of traffic and the Odeon Events Centre recorded the lowest.



Pedestrian numbers increased on the second Wednesday of the count at all locations. The table below outlines the results, and records the average (mean) number of pedestrians for the Wednesday counts.

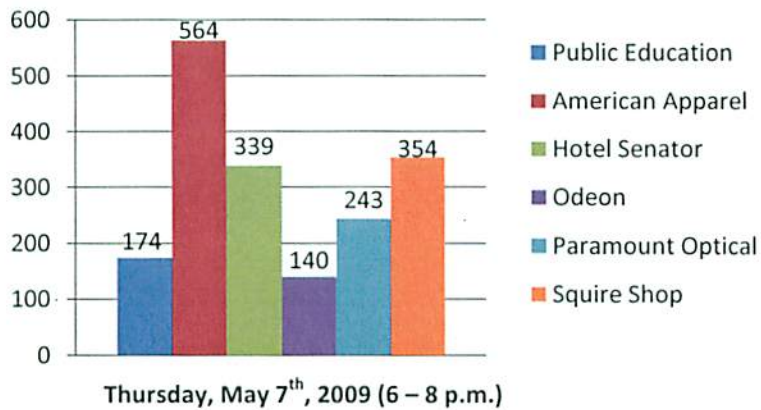
TABLE 1: Wednesday Pedestrian Count Results and Averages

| Date & Time | Public Education | American Apparel | Hotel Senator | Odeon | Paramount Optical | Squire Shop |
|---------------------|------------------|------------------|---------------|--------------|-------------------|-------------|
| May 6/09 (1-3p.m.) | 286 | 738 | 425 | 217 | 603 | 846 |
| May 20/09 (1-3p.m.) | 296 | 981 | 607 | 266 | 749 | 990 |
| Average | 291 | 859.5 | 516 | 241.5 | 676 | 918 |

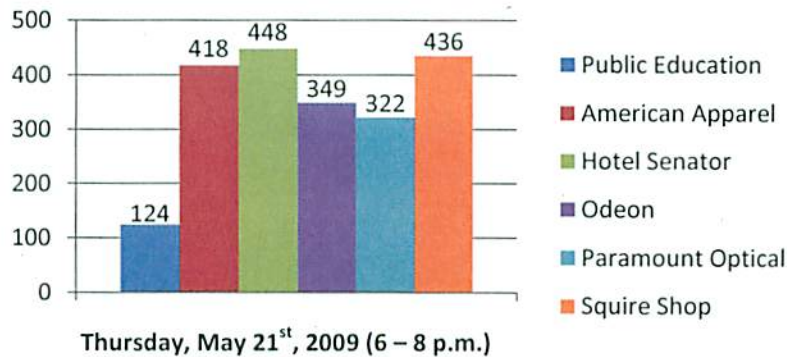
2009 DATA AND RESULTS

Thursday Pedestrian Counts

Thursday, May 7th was partly cloudy with a light wind. The temperature remained the same throughout the count at 7° C. At 6 p.m. the wind was blowing North East at 7 km/h. By 8 p.m. the wind had shifted to an Eastern wind at 19 km/h. American Apparel recorded the highest number of pedestrians, while the Odeon Events Centre recorded the lowest traffic.



Thursday, May 21st was partly cloudy and windy. The temperature remained at 16° C throughout the count. At 6 p.m. the wind was Northern at 20 km/h and by 8 p.m. the wind had decreased to 13 km/h. The Hotel Senator received the highest volume of traffic, while the Public Education Centre received the lowest.



Pedestrian traffic increased on the second Thursday of the count at all locations except for the Public Education Building and American Apparel. The traffic at the Odeon Events Centre doubled in comparison to the first Thursday, since there was an event occurring during the study. The temperature was much warmer on the second Thursday of the study, compared to the first. The table below displays the results, which records the average (mean) number of pedestrians for the Thursday counts.

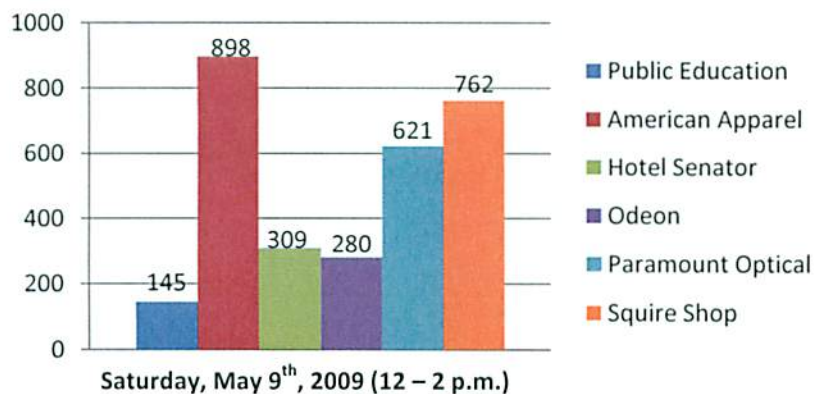
TABLE 2: Thursday Pedestrian Count Results and Averages

| Date & Time | Public Education | American Apparel | Hotel Senator | Odeon | Paramount Optical | Squire Shop |
|----------------------|------------------|------------------|---------------|--------------|-------------------|-------------|
| May 7/09 (6-8 p.m.) | 174 | 564 | 339 | 140 | 243 | 354 |
| May 21/09 (6-8 p.m.) | 124 | 418 | 448 | 349 | 322 | 436 |
| Average | 149 | 491 | 393.5 | 244.5 | 282.5 | 395 |

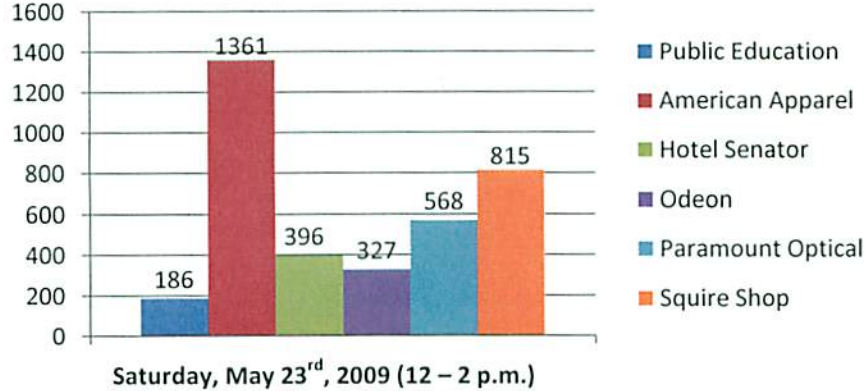
2009 DATA AND RESULTS

Saturday Pedestrian Counts

Saturday, May 9th was cloudy, with light wind and rain showers beginning at 1:15 p.m. The temperature at 12 p.m. was 6 °C with a South Eastern wind of 6 km/h. By 2 p.m. the temperature rose to 7° C, but the wind remained the same. American Apparel recorded the highest volume of traffic, while the Public Education Centre received the lowest traffic.



Saturday, May 23rd was sunny with moderate winds. At 12 p.m. the temperature was 17° C with Western winds of 15 km/h. By 2 p.m. the temperature increased slightly to 19° C, while the wind decreased to 9 km/h. American Apparel received the highest volume of traffic, while the Public Education Centre received the lowest.



Pedestrian traffic during the second Saturday of the study increased at all locations except for Paramount Optical. The temperature doubled on the second Saturday of the study, with winds increasingly higher than the first count.

TABLE 3: Saturday Pedestrian Count Results and Averages

| Date & Time | Public Education | American Apparel | Hotel Senator | Odeon | Paramount Optical | Squire Shop |
|-----------------------|------------------|------------------|---------------|--------------|-------------------|--------------|
| May 9/09 (12-2 p.m.) | 145 | 898 | 309 | 280 | 621 | 762 |
| May 23/09 (12-2 p.m.) | 186 | 1361 | 396 | 327 | 568 | 815 |
| Average | 165.5 | 1129.5 | 352.5 | 303.5 | 594.5 | 788.5 |

Conclusions & Executive Summary

2009

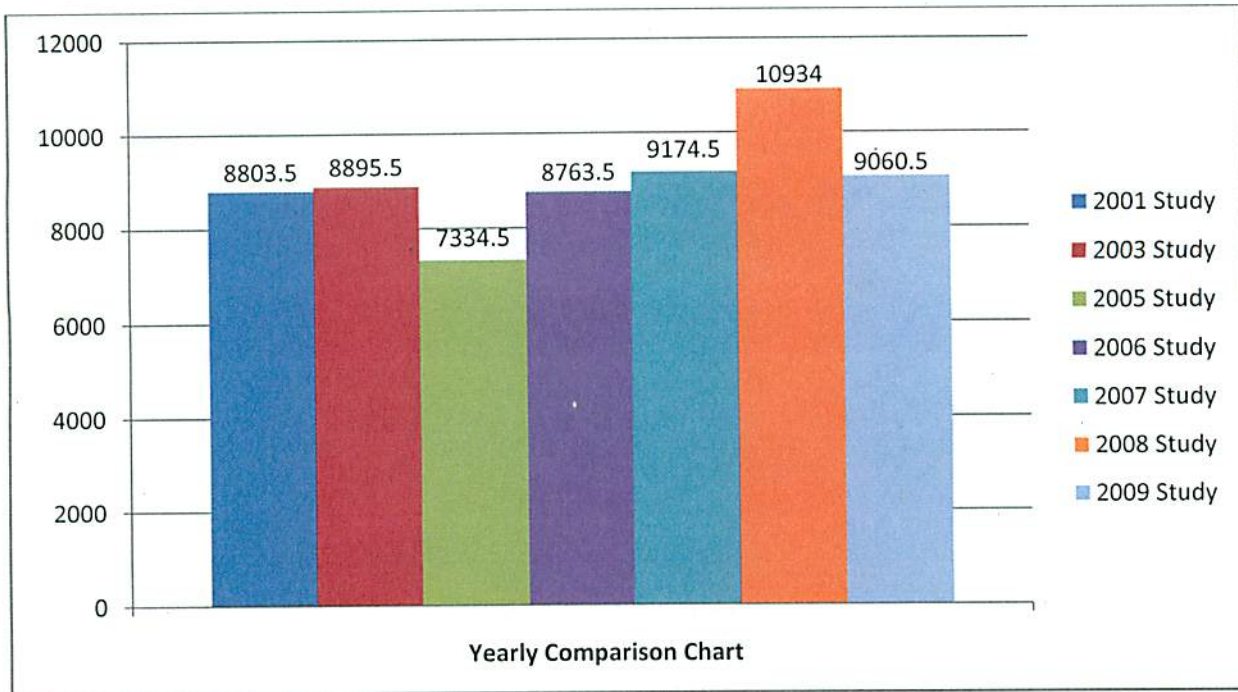
The Squire Shop recorded the highest volume of traffic during the Wednesday counts, while the Odeon Events Centre recorded the lowest volume of traffic. American Apparel (formerly Urban Barn) observed the highest pedestrian count on the first Thursday of the study, while the Hotel Senator received the highest traffic on the second Thursday of the count. The lowest traffic on the first Thursday was recorded at the Odeon Events Centre, while the Public Education Centre recorded the lowest count for the second Thursday. American Apparel recorded the highest pedestrian traffic on Saturdays of the count, while the Public Education Building recorded the lowest traffic.

TABLE 4: 2009 Averages and Ranking

| Date & Time | Public Education | American Apparel | Hotel Senator | Odeon | Paramount Optical | Squire Shop |
|------------------------|------------------|------------------|---------------|----------|-------------------|-------------|
| Wednesday (1-3 p.m.) | 291 | 859.5 | 516 | 241.5 | 676 | 918 |
| Thursday (6-8 p.m.) | 149 | 491 | 393.5 | 244.5 | 282.5 | 395 |
| Saturday (12-2 p.m.) | 165.5 | 1129.5 | 352.5 | 303.5 | 594.5 | 788.5 |
| Total # of Pedestrians | 605.5 | 2480 | 1262 | 789.5 | 1553 | 2101.5 |
| OVERALL RANKING | 6 | 1 | 4 | 5 | 3 | 2 |

2001/2003/2005/2006/2007/2008/2009 Pedestrian Count Comparison

| Location | 2001 | 2003 | % Change from 2001 | 2005 | % Change from 2003 | 2006 | % Change from 2005 | 2007 | % Change from 2006 | 2008 | % Change from 2007 | 2009 | % Change from 2008 |
|-------------------|--------|--------|--------------------|--------|--------------------|--------|--------------------|--------|--------------------|--------|--------------------|--------|--------------------|
| Public Education | 1355 | 1031 | -24% | 917 | -11% | 1199 | 24% | 914 | -24% | 1100 | 20% | 605.5 | -45% |
| American Apparel | 1461.5 | 1477.5 | 1% | 1100.5 | -26% | 1503.5 | 27% | 1234 | -18% | 1512 | 23% | 2791.5 | 85% |
| Hotel Senator | 2020 | 2423 | 20% | 2052 | -15% | 2255 | 9% | 2787.5 | 24% | 2981.5 | 7% | 1247.5 | -58% |
| Odeon | 1592 | 1439 | -10% | 1416.5 | -2% | 1548.5 | 9% | 1682.5 | 9% | 2024.5 | 20% | 844.5 | -58% |
| Paramount Optical | 1728 | 1912 | 11% | 1271.5 | -33% | 1596 | 20% | 1777.5 | 11% | 1949 | 10% | 1535.5 | -21% |
| Squire Shop | 647 | 613 | -5% | 577 | -6% | 661.5 | 13% | 779 | 18% | 1367 | 75% | 2086 | 53% |
| Totals | 8803.5 | 8895.5 | 1% | 7334.5 | -18% | 8763.5 | 19% | 9174.5 | 5% | 10934 | 19% | 9060.5 | -17% |



As the above chart indicates, the 2008 Downtown Pedestrian Traffic Study recorded the highest number of pedestrians since the studies began in 2001. This year's study shows a decrease by 17% since 2008.

In comparison to 2008, the most significant increase was at American Apparel (formerly Urban Barn) with 85%. The highest pedestrian traffic recorded was at American Apparel. All locations, except American Apparel and the Squire Shop, observed a large decrease in pedestrian traffic.

2008: Temperatures ranged from 9 - 22° C, conditions once again were similar to those of 2007, except that we did not have rain during the 2008 pedestrian count.

2009: Temperature ranged from 4 - 19° C, conditions were similar to those in 2008, except the temperature was slightly colder than usual.

Some significant changes that occurred since the 2008 study was conducted; included the completion of Persephone Theatre and the ongoing development on River Landing. There has also been an increase in the residential component Downtown; further changes are expected over the next year, with the renovation of the King George Hotel which is currently underway and other commercial development projects, along with residential development in the Warehouse District.