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DOWNTOWN WINNIPEG MARKET RESEARCH



www.downtownwinnipeg trends.com

2014



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A Period of Unprecedented Growth

A new downtown is emerging, with more than \$2 billion of investment made in the diversification, animation, and residential revival of our city's core. Whereas the late 1980s to the early 2000s were characterized by slower growth, downtown since 2005 has seen a new course of growth, with more than 100 projects added, helping to bring people, investments, and vigour to the heart of our city.

The information in this market research report will provide you with a snapshot of the people who work, live, learn and play downtown. It will give you insight into the perceptions of the public and information about the developments that have generated increased traffic and significant re-investment in our downtown. Ideally it will inspire you to take advantage of business opportunities in our city centre.

This report is about helping you be part of building our downtown into a vibrant and thriving centre.

The research in this report has been compiled by the Downtown Winnipeg BIZ with support from other downtown stakeholders like the University of Winnipeg's Institute of Urban Studies, CentreVenture Development Corporation, The Forks North Portage Partnership, and Economic Development Winnipeg Inc., as well as from surveys and research the BIZ has undertaken. It is designed based on feedback from downtown retailers, realtors and stakeholders about how we can promote, sustain, invest, and stimulate business development in downtown.

This information is relevant to you, whether you are an existing downtown business considering new marketing opportunities or expansion; a real estate broker or agent representing a client who is thinking of making an investment in our downtown; or an entrepreneur looking at investment in downtown property or opening a business.

Sincerely,

Stefano Grande
Downtown Winnipeg BIZ

Marina James
Economic Development Winnipeg Inc.

Ross McGowan
CentreVenture Development Corporation

Jim August
The Forks North Portage Partnership





1,812 housing units have been constructed since 2005, with 845 more planned

Downtown: The Driving Force For Winnipeg's Growth

15 LEED certified buildings (or awaiting LEED certification)

26 BOMA BEST/Green Globes certified buildings

861 postal codes in the downtown

210 free WIFI locations, with dozens more currently being installed

Over **200,000 Twitter followers** of downtown agencies

More than **69,000 people** come downtown to work everyday

More than **24,000 students** come downtown to learn every year

Almost **16,000 people** live downtown

1,812 housing units have been constructed since 2005, with **845 more planned**

More than **2.8 million** out-of-town tourists visit Winnipeg each year

An estimated **\$647 million** was spent by tourists in Winnipeg in 2011

An estimated **308,000 people** attended nearly **655 events/conventions** in Winnipeg in 2012. An estimated **404,000** will attend **743 events/conventions** when the Convention Centre is expanded

There are **4 million annual visits to The Forks**, which was named Best Public Space in Canada (Canadian Institute of Planners)

There are about **1.5 million annual visits** to the Millennium Library

There are **1 million annual visits** to the MTS Centre, the **13th busiest venue** in North America

More than **2 billion** has been invested downtown since 2005

More than **900,000 people** attended downtown events every year

Over **4,000,000 people** visit downtown arts and entertainment venues every year, with an additional 4 million attending The Forks

20% of creative industries are located downtown (670 businesses in total). Creative industries ^[1] employ over **25,000 people** citywide, attract **1.1 million tourists** and spend **\$87 million** annually

16 major public art installations, adding over **\$1.8 million** of investment downtown

Cycling is up 60% in Winnipeg since 2009, and an estimated **6,200 people** commute downtown by bicycle

Walk Score is a website that rates over 10,000 neighbourhoods in almost 3,000 cities with respect to their access to public transit, commuting time, and proximity to people and places. We looked at 3-4 downtown neighbourhoods and they scored between 88-98 out of 100 for walkability. ^[2]

There's **440,000 m²** of downtown green space

[1] The arts and creative industries are made up of arts and cultural organizations, which we define as non-profit entities engaged in artistic activities, and creative industries, which include private firms whose business relates to arts and culture. The Ticket to the Future report employs a definition of the arts and creative industries based on the North American Industry Classification System (NAICS).

[2] www.walkscore.com

Why Downtown?

From Portage and Main and from communities across Canada to our neighbours worldwide – people are taking note of the exciting progress occurring in our downtown. While we all strive to create a more liveable city – one with a better built environment, increased cultural amenities, a thriving economy, improved social well-being and feelings of safety, and sustainability for the many generations to come – it is our undeniable love for Winnipeg and the heart of our city that continues to drive development forward. That sense of community pride and optimism beats in the heart of downtown Winnipeg, in every one of the tens of thousands of students, office workers, residents, and tourists who frequent this bustling part of the city daily.

More than \$2 billion has been invested downtown since 2005 and \$266,000,000 of investment is proposed

Over 200,000 Twitter followers of downtown agencies

20% of creative industries are located downtown

15 LEED certified buildings

Cycling is up 60% in Winnipeg since 2009

1.5 million annual visits to the Millennium Library

6,200 people commute downtown by bicycle

900,000 people attended downtown events

308,000 people attended nearly 655 events/conventions

More than 2 billion has been invested downtown since 2005

More than 2.8 million out-of-town tourists

More than 24,000 students come downtown to learn every year

26 BOMA BEST/Green Globes certified buildings

4,000,000 people visit downtown arts and entertainment venues

210 free WIFI locations

Almost 16,000 people live downtown

1,812 housing units constructed since 2005

1 million annual visits to the MTS Centre

MTC Centre is the 13th busiest venue in North America

\$647 million is spent by tourists

4 million annual visits to The Forks

16 major public art installations

More than 69,000 people work downtown

There's 440,000 m² of downtown green space

861 postal codes

Winnipeggers' Love Downtown

Downtown is the heart of our city. People come downtown to work, live, shop, dine, learn, invest and play. It is the meeting place for people from all walks of life – a place where culture, arts, history and entertainment intersect. Downtown belongs to everyone.

The majority of Winnipeggers believe downtown is constantly changing for the better! They view downtown as a clean, pedestrian-friendly place with a variety of unique cultural districts, contributing to the formation of a contemporary and historic city centre. Here all ages, ethnicities and cultures combine to create an atmosphere unlike any other in the city.



Downtown is the Place to Invest

Healthy downtowns are critical to the lives of all Canadians and are key to a sustainable and prosperous future. They are economic engines that create jobs and taxes that can be reinvented and reallocated for further development.

The following investments in downtown Winnipeg convey continued and increased confidence in the area and are attracting thousands of people to the city's core. All levels of government and the private sector are making key strategic investments to help our downtown thrive.

We began our review with 2005 because of significant changes that occurred late in 2004.

\$2 Billion Invested for a Vibrant, Prosperous Downtown (Since 2005)

Investment (Built/Under Construction)	\$2 billion ^[1]
Investment (Proposed)	\$265.50 million ^[2]
Total # Residential Units (Built/Under Construction)	1,812
Total # Residential Units (Planned)	845
Total Sq. Ft. Commercial/Office/Institutional Space (Built/Construction)	2,757,604
Total Sq. Ft. Education/Museum Space (Built)	700,000
Total Sq. Ft. Commercial (Planned)	90,000
Total # Hotel Rooms (Under Construction)	221
Total # Hotel Rooms (Planned)	400+
Total # Built Developments (2005-2009)	49
Total # Built Developments (2010-2013)	62
Total # Built Developments (2005-2013)	111

[1] IUS, 2013. Downtown Development Map Database, unpublished.

[2] Special note: Many developments are unreported; the actual total should be higher.

Downtown keeps growing! Check out an up-to-date listing of downtown investments and development projects online: www.downtownwinnipegtrands.com

WHY PEOPLE COME DOWNTOWN

to dine to invest
to live to visit to experience
to work to learn to shop

Profile of People Who Regularly Come Downtown (More than 22 visits/month) ^[1]

77.1% completed University/College

36.7% are ages 25-34 and 24.5% are ages 35-44

52.1% have approximate annual household income of \$75,000 and over

58.9% are married/common-law while 41.1% are single

[1] Downtown BIZ Trends Survey, 2013

Downtown is the Place to Shop

RETAIL CONFIDENCE

83.3% of downtown businesses are confident about the current and future direction of downtown Winnipeg. ^[1]

279 of downtown businesses are retail. ^[2]

BUSINESS LEADERS LIST DOWNTOWN WINNIPEG'S GREATEST STRENGTHS ^[1]

Arts and culture
Heritage value
Events and festivals
New development projects

VISITORS FREQUENTLY PURCHASE: ^[3]

Clothes
Jewelry & accessories
Books and magazines
Drugstore/pharmacy items
Shoes

VISITORS FREQUENTLY ACCESS THE FOLLOWING SERVICES: ^[3]

Banks
Postal services
Wireless café
Doctors/Dentists
Hair salons
Fitness facilities

VISITORS FREQUENTLY VISIT THE FOLLOWING SHOPPING MALLS/AREAS: ^[3]

Portage Place
Exchange District
cityplace Mall
Winnipeg Square
The Forks



Shopping Centres

SHOPPING CENTRE/ RETAILER	SQ. FT.	# OF RETAIL SHOPS	# OF SHOPS (SERVICES/ OFFICES/HEALTH/BEAUTY)
Portage Place	497,561	50	23
Winnipeg Square	60,000	10	13
Richardson Concourse	42,100	5	8
cityplace	115,000	11	14
Shops of the Forks Market	45,000	38	4
Johnston Terminal	80,000	11	–
The Bay	240,000	1	–
Mountain Equipment Coop	33,933	1	–
Totals:	1,071,494	127	62 ^[4]

[1] Downtown BIZ Member Survey, 2013

[2] Canadian Business Patterns, 2012

[3] Downtown BIZ Trends Survey, 2013

[4] Mall Websites



Financial Post Top 500 Corporations Based in Winnipeg (2013)

Downtown is the Place to Work

WORKERS' DAILY ACTIVITIES ^[1]

- 87.3%** of office workers are employed full-time (30+ hours/week)
- 71.6%** of office workers take 30-60 minutes for their lunch break
- 75.4%** of office workers dine during their lunch break
- Majority of office workers travel to work by bus (**47.2%**)
- 49.1%** of office workers shop or purchase food and beverages downtown 1-3 times/week
- 60.5%** of office workers spend \$1-\$9/week on coffee/snacks
- 47.0%** spend \$10-\$29/week on lunch
- 63.6%** of non-downtown residents visit restaurants and/or retail stores before Winnipeg Jets home games

DEMOGRAPHICS ^[1]

- 78.5%** completed University/College
- 33.5%** are ages **25-34** and **23.8%** are ages **35-44**
- 52.5%** have approximate annual household income of **\$75,000** and over
- 59.2%** are married/common-law while **40.8%** are single
- Downtown supports about **69,000** jobs (18% of Winnipeg CMA). This is up significantly since the 2006 census. (NHS-Focus on Geography Series-Winnipeg & Work and Commuting in Census Metropolitan Areas, 1996-2001).

DOWNTOWN IS THE ENTERTAINMENT, CULTURAL AND ECONOMIC HEART OF THE CITY. CREATIVE INDUSTRIES IMPACT WINNIPEG AND THE DOWNTOWN ECONOMY.

- 20%** of creative industries located downtown (about 680 businesses) ^[2]
- 25,000** people employed citywide ^[3]
- Helps attract **1.1** million tourists who spend **\$87** million annually in Winnipeg ^[3]
- \$1** billion economic output ^[3]
- Arts and culture-related events record **2.6** million local admissions and generate **500,000** visits from arts enthusiasts from outside the city ^[3]

RANKING	COMPANY	# OF EMPLOYEES
57	Cargill Ltd.	8,000
205	The North West Co. Inc.	6,800
175	Manitoba Telecom Services Inc.	5,500
131	The Manitoba Hydro-Electric Board	4,631
91	James Richardson & Sons Ltd.	3,000
146	The Wawanesa Mutual Insurance Co.	2,300
219	New Flyer Industries Inc.	2,200
393	Winpak Ltd.	1,935
325	Manitoba Lotteries Corp.	1,900
285	The Manitoba Public Insurance Corp.	1,700
400	Boeing Canada Inc.	1,600
390	Manitoba Liquor Control Commission	1,200
344	Ridley Inc.	835



WINNIPEG OFFICE SPACE INVENTORY & VACANCY [4]

Building Type	Inventory	Vacancy	(%)
Class A	2,652,869	132,107	5.0
Class B	3,874,572	273,391	7.1
Class C	1,779,755	159,509	9.0
Total A,B, C	8,307,196	565,007	6.8
Class D	1,001,001	62,843	6.3
Government	1,774,160	143,000	8.1
Medical	464,802	50,262	10.8
Miscellaneous	1,501,687	213,853	14.2
Total Downtown	13,048,846	1,034,965	7.9

YEAR END CLASS A TO C DOWNTOWN VACANCY RATE [4]

year	Class A	Class B	Class C	Overall
2004	10.0%	4.3%	4.4%	6.1%
2005	8.4%	5.9%	5.3%	6.6%
2006	9.0%	5.1%	3.4%	6.0%
2007	5.7%	7.4%	1.7%	5.8%
2008	5.1%	3.0%	2.5%	3.7%
2009	3.8%	7.1%	4.2%	5.4%
2010	4.8%	7.0%	5.6%	6.0%
2011	5.1%	7.8%	6.7%	6.7%
2012	4.3%	8.9%	7.6%	7.2%
2013	5.0%	7.1%	9.0%	6.8%

YEAR END RETAIL VACANCY RATE DOWNTOWN [4]

year	Retail
2004	12.1
2005	12.4
2006	12.7
2007	10.7
2008	9.5
2009	10.2
2010	11.0
2011	11.1
2012	12.1
2013	8.5



YEAR END RETAIL VACANCY & AVERAGE ASKING NET RENT [4]

District	2012		2013	
	Vacancy	Rent	Vacancy	Rent
Downtown	156,181	\$16.46	109,468	\$16.74

OVER 31.9% OF OFFICE WORKERS EXERCISE DURING THEIR LUNCH BREAK [1].

There are a number of gyms and other fitness facilities in the downtown area:

YMCA – YWCA Downtown
 Yoga Public
 Bikram Yoga
 Urban Wellness Centre
 Goodlife
 Pan-Am Boxing
 Higher Level Fitness

[1] Downtown BIZ Trends Survey, 2013

[2] IUS, 2012

[3] Winnipeg Arts Council (Ticket to the Future: Economic Impact of the Arts and Creative Industries, 2009) and (Ticket to the Future Phase II: A Cultural Action Plan, 2011)

[4] The Johnson Report: 2013 Year End Market Report



Downtown is the Place to Experience

Downtown is Winnipeg's premier entertainment destination hosting a mosaic of districts that are home to unique cultures. It is where history meets the present and where hundreds of thousands of people gather to experience what our city has to offer. Whether it is our thriving arts and theatre, a concert or sporting event or an evening submersed in our nightlife, visitors are always spending money at local businesses, enjoying a positive downtown experience that will keep them coming back.



Major Downtown Events

There are over 50 festivals that run in the downtown, attracting well over 900,000 people to the downtown. Here are some of the major events:

Festival or event	Attendees (2013 or most recent) ^[1]
Aboriginal Day Live & Celebration	40,000
Barge Fest	30,000
Canada Day at The Forks	60,000
Manitoba Culture Days	35,000
Doors Open Winnipeg	25,000
Festival of Fools	35,000
Winnipeg Fringe Theatre Festival	101,488
TD Winnipeg International Jazz Fest	40,000
Winnipeg International Children's Festival	40,000
Manito Ahbee Festival	20,280
ManyFest	50,000
Movies on Memorial	3,000
Winnipeg Symphony Orchestra New Music Festival	6,000
Pride Winnipeg Festival	20,000
Winnipeg Santa Claus Parade	40,000
Winnipeg International Writers Festival	4,500
Folklorama (downtown pavilions, pop-up events, kick-off at The Forks, media event, group tours)	38,922
Downtown Farmers' Market	7,000
Canada Day Living Flag	3,500

Visit us online at www.downtownwinnipeg.com for a full listing of downtown events!

Attendance at downtown venues is over 4,000,000 people/year (with only ¾ reporting), with an additional 4 million at The Forks.^{[1] [2]}

Performing Arts	Visitors/Year
Manitoba Theatre Centre- John Hirsch Mainstage	96,451
MTC Warehouse	18,817
Prairie Theatre Exchange	100,000
Winnipeg Symphony Orchestra	104,000
Royal Winnipeg Ballet	30,591
Manitoba Theatre for Young People	49,319
Manitoba Opera	12,885
Winnipeg Jazz Orchestra	2,829
Virtuosi Concerts	2,871

Museums and Galleries	Visitors/Year
The Manitoba Museum	221,300
Science Gallery	65,300
Planetarium	43,800
Manitoba Children's Museum	167,561
The Winnipeg Art Gallery	120,235
Splash Dash Tours	26,000
Manitoba Legislative Building	17,845
Plug In Institute of Contemporary Art	254,000
Gallery 1C03	5,000
Dalnavert Museum	4,268
Manitoba Sports Hall of Fame	574
Ukrainian Cultural & Education Centre	6,000
Winnipeg Railway Museum	8,159
Manitoba Crafts Museum and Library	865

Cinemas	Visitors/Year
Towne Cinema	129,891
Globe Cinema	39,000
Cinematheque	13,000

Performance / Theatres / Concert Halls	Visitors/Year
Centennial Concert Hall	275,000
Pantages Playhouse Theatre	57,670
Burton Cummings Theatre	40,000
Garrick Centre	27,000

Sports & Recreation	Visitors/Year
Millennium Library	1,007,559
Winnipeg Goldeyes – CanWest Global Ball Park	320,000
U of W Duckworth Centre	176,500
YMCA/YWCA	472,746
Granite Curling Club	1,150

Major Downtown Entertainment Venues	Visitors/Year
The Forks	4,000,000
MTS Sports & Entertainment Centre	1,026,980
Winnipeg Convention Centre	308,890

16 major public art installations have been built downtown, adding over **\$1.8 million** of investment.^[3] Full art installation listing online at www.downtownwinnipeg.com.

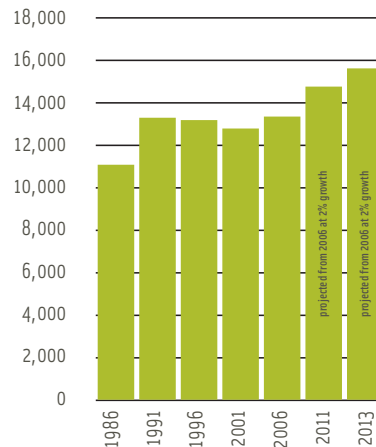
[1] IUS, April-June 2013. Survey of Downtown Winnipeg Venues, unpublished.

[2] The Forks North Portage Partnership, 2013. Retrieved from: www.theforks.com/about/the-forks

[3] Winnipeg Arts Council, 2013



DOWNTOWN POPULATION



Downtown is the Place to Live

AWARENESS OF DOWNTOWN LIVING OPTIONS ^[1]

82.6% of people are aware of existing and emerging residential options available downtown

REASONS FOR LIVING DOWNTOWN ^[1]

- Ability to walk everywhere
- Central location/close to everything
- Convenience/accessibility
- Access to public transit/no need for car
- Access to entertainment/nightlife/culture
- Like the lifestyle/urban lifestyles/vibrant/lots to do
- Close to work

DEMOGRAPHICS OF DOWNTOWN DWELLERS ^[1]

- 61.3%** have completed University/College
- 42.0%** are households with only 1 person
- 33.8%** are aged 25-34 while **14.6%** are aged **35-44**
- 59.7%** are single while **40.3%** are married/common-law

While the **1990s** saw a slight population loss, downtown Winnipeg has experienced sustained growth of 10% over the last decade, or 1% per year. Current population figures are estimated until results from the 2011 Census become available. The City of Winnipeg forecasts growth in the range of 1.9-2.4%. Using 2% per year cumulative growth, we expect the downtown population to now be **15,473**. ^[2]

One Census tract that stretches from the East Exchange District to beyond the downtown in SouthPointDouglas has experienced more than **50%** population growth since **2006!** ^[3]

Downtown area is **3.1 sq. km.** of which **1.9 sq. km.** is populated neighbourhoods. ^[4]

43% of all downtown residents live in the Broadway-Assiniboine district of the downtown ^[5]

1,812 residential units were built between **2005** and **2013**. **845** more are currently planned. ^[6]

Learn more about downtown's neighbourhoods online at www.downtownwinnipegrends.com

[1] Downtown BIZ Trends Survey, 2013

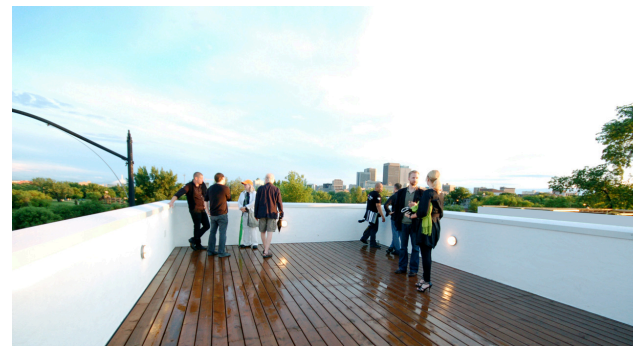
[2] IUS, 2013

[3] Preliminary 2011 Census Data from Tract 0024.00

[4] 2006 Neighbourhood Profile, City of Winnipeg PP&D

[5] City of Winnipeg, 2008

[6] IUS, 2013. Downtown Development Map Database, unpublished.



Downtown is the Place to Dine

SPENDING HABITS ^[1]

45.6% come downtown at least **22** times per month

59.4% of visitors come downtown **1-3 times/week** to purchase food and beverages downtown

58.5% of visitors spend **\$1-\$9/week** on coffee/snacks

38% of visitors spend **\$10-\$29/week** on lunch

48.7% of visitors visit restaurants and/or retail stores before Winnipeg Jets home games

42.1% of downtown residents purchase food and beverages downtown **1-3 times/week**

55.7% of downtown residents spend **\$1-\$9/week** on coffee/snacks

Majority of downtown residents spend **\$10-\$29/week** on lunch, dinner, and take-home meals

37.1% spend more than **\$50/week** on groceries downtown

46.9% of downtown residents visit restaurants and/or retail stores before Winnipeg Jets home games

46.6% of students purchase food and beverages downtown **1-3 times/week**

59.5% of students spend **\$1-\$9/week** on coffee/snacks

45% of students spend **\$10-\$29/week** on lunch

42.5% of students visit restaurants and/or retail stores before Winnipeg Jets home games

WHAT RESTAURANTS VISITORS FREQUENT MOST ^[1]

Cafés/coffee shops

Food courts

Fine dining

Pub/bar



OPPORTUNITY: WHAT PEOPLE WANT MORE OF ^[1]

Restaurants with patios

Trendy bistros

Ethnic restaurants

Grocery stores

Sushi restaurants

Healthy restaurants

Vegetarian restaurants

Gastro pubs

Locally owned

There are 82 restaurants downtown representing all types, styles, and numerous ethnicities. Downtown also has 39 restaurant patios. ^[2]

SHOPPING CENTRE/RETAILER	SQ. FT.	# OF RESTAURANTS/COFFEE SHOPS/DELI
Portage Place	497,561	19
Winnipeg Square	60,000	19
Richardson Concourse		3
cityplace	115,000	13
Shops of the Forks Market	45,000	25
Johnston Terminal	80,000	3 ^[3]

[1] Downtown Trends Survey, 2013

[2] Downtown Winnipeg Magazine, Spring/Summer 2013

[3] Mall Websites

Downtown is the Place to Learn

ABOUT 24,000 STUDENTS STUDY IN THE DOWNTOWN AT 21 DIFFERENT TECHNICAL SCHOOLS AND UNIVERSITIES. ^[1]

Downtown universities, colleges & schools	Enrolment
University of Winnipeg	11,446
University of Manitoba Downtown	2,138
Immigrant Centre Manitoba	1,800
Red River College	1,700
Royal Winnipeg Ballet School	1,491
MB Theatre for Young People	1,184
Winnipeg Adult Education Centre	890
Manitoba Conservatory of Music and Arts	800
Aboriginal Community Campus	559
School of Contemporary Dancers	500
CDI College	450
Heartland International English School	230
Neeginan Learning and Literacy Centre	192
Horizons Learning Centres	181
William & Catherine Booth College	181
Neeginan Institute of Applied Technology	150
Anokiiwin Training Institute	100
Asper Executive School	100
Patal Vocational Preparation Schools	85
Scientific Marvel	50
Literacyworks	33
Robertson College	n/r
Total	24,260

IMPACT OF POST SECONDARY EDUCATION INVESTMENTS ^[1]

INVESTMENT	(Millions)
University of Winnipeg: Richardson College for the Environment	\$66.6
University of Winnipeg: UNITED Health & RecPlex	\$40.0
Red River College: Paterson Global Foods (Union Bank Tower)	\$35.0
University of Winnipeg: Wesley Hall Restoration	\$19.2
University of Winnipeg: McFeetors Hall	\$17.5
University of Winnipeg: Buhler Center	\$15.0
University of Winnipeg: The AnX Redevelopment	\$5.5
University of Winnipeg: General Restorations	\$3.0
University of Winnipeg: UWSA Daycare	\$2.5
University of Winnipeg: Student Housing (behind Buhler Centre)	\$27.0
Total (in millions)	\$231.3

[1] IUS, 2013. Survey of Downtown Educational Facilities, unpublished.



Downtown is the Place to Visit

The majority of tourists who visit Winnipeg each year often stay downtown and contribute to huge economic gains in our city. With 13 hotels and a diverse array of festivals and attractions to explore, downtown is a popular destination for travellers. This constant flow of people is helping spur new development in the heart of our city.

NEW ATTRACTIONS SUPPORT GROWTH ^[1]

The **\$350 million** Canadian Museum for Human Rights expects annual visits of upwards to **250,000** people

The **\$210 million** expansion of the RBC Convention Centre will make it the fourth-largest in Canada

The **\$19 million** Upper Fort Garry Historical Interpretive Centre anticipates thousands of annual visits

CONVENTION CENTRE ATTENDEES ^[2]

2012: **655** events with **308,890** attendees

Forecast (after expansion): **743** events with **404,961** attendees

FAST FACTS

4.0 million annual visits to Winnipeg ^[3]

\$647 million estimated total visitor expenditures ^[3]

Visitors spend **\$143** per person, per visit ^[3]

Overnight visitors spend **\$278** per person, per visit ^[3]

707,000 are out-of-province Canadians visiting ^[3]

35% spend at least one night in the city ^[3]

Attendance at downtown venues is approximately **4 million** annually, with an additional **4 million** visiting The Forks. ^[4]

More than **2,375** hotel rooms downtown ^[5]

13 hotels in the downtown ^[5]

Hotel occupancy rate **63.9%**; the Canadian average of **64.6%** ^[6]

Average hotel room rate **\$116.57** ^[6]



WINNIPEG AS A TOP WINTER DESTINATION

The Forks

Red River Mutual Trail holds the Guinness World Record for longest naturally frozen skating trail in the world at **8.54 km**.

Trails on land around The Forks site measures **1.2 km**.

(Length varies by year)

Skating Rinks

Canopy rink at The Forks

Olympic sized rink near Scotiabank stage

2 hockey rinks on the river

Toboggan hill behind the Inn at the Forks

Central Park

Full size ice skating rink in the park

Granite Curling Club

Oldest and largest curling club in Manitoba, **formed 1880**

9 sheets of ice

[1] "Winnipeg Tourism: Sector Profile". Economic Development Wpg. (2011)

[2] IUS, 2013. Personal correspondence with David Chizda, Director of Sales and Marketing, RBC Convention Centre Winnipeg (March 27, 2013)

[3] Research Resolutions & Consulting Ltd. Adapted from Statistics Canada 2011 Travel Survey of Residents of Canada and 2011 International Travel Survey.

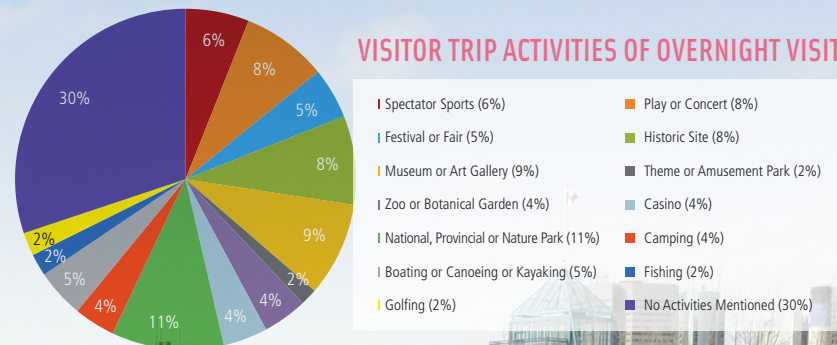
[4] The Forks North Portage Corporation, 2013. Webpage: About The Forks, Retrieved from www.theforks.com/about/the-forks.

[5] Visit Winnipeg: Tourism Winnipeg's Official 2013 Visitor Guide

[6] Tourism Winnipeg, 2013

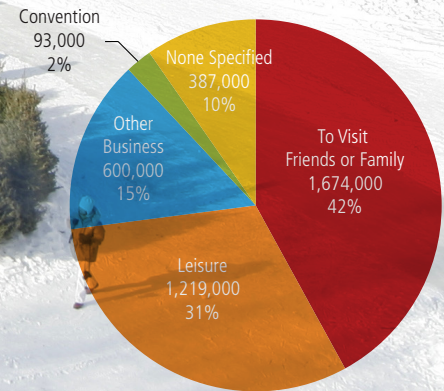


VISITOR TRIP ACTIVITIES OF OVERNIGHT VISITORS



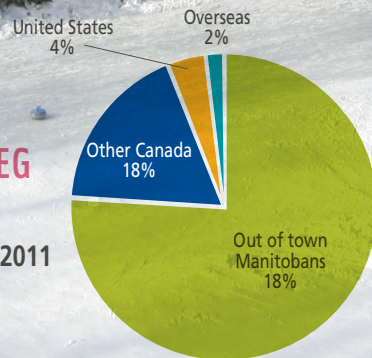
VISITOR PURPOSE

Total visitors by Trip Purpose, 2011



VISITORS TO WINNIPEG (TOURISM WINNIPEG, 2011)

Visitors by Place of Origin, 2011



Downtown is a Safe Place

56.3% of downtown business owners believe there are public misconceptions about how safe downtown Winnipeg is. ^[1]

RESIDENTS' PERCEPTION OF DOWNTOWN SAFETY

Majority of residents feel safe downtown during the day ("**Strongly agree**")

Majority of residents feel safe downtown at night ("**Somewhat agree**")

Majority of residents feel safe parking their vehicle during the day ("**Strongly agree**") ^[2]

VISITORS' PERCEPTION OF DOWNTOWN SAFETY

Majority of non-downtown residents feel safe downtown during the day ("**Strongly agree**")

Majority of non-downtown residents feel safe downtown at night ("**Somewhat agree**")

Majority of non-downtown residents feel safe parking their vehicle during the day ("**Strongly agree**") ^[2]

WORKERS' PERCEPTION OF DOWNTOWN SAFETY

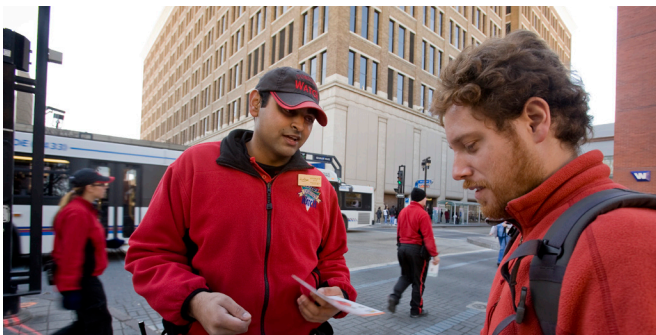
Majority of downtown workers feel safe downtown during the day ("**Strongly agree**")

Majority of downtown workers feel safe downtown at night ("**Somewhat agree**")

Majority of downtown workers feel safe parking their vehicle during the day ("**Strongly agree**") ^[2]

[1] Downtown BIZ Member Survey, 2013

[2] Downtown BIZ Trends Survey, 2013



Downtown is a Clean Place

HOW CLEAN IS DOWNTOWN?

2004: **63%** of people said downtown was clean

2007: **82%** of people said downtown was clean

2013: **86%** of people said downtown was clean ^[1]

Majority of non-downtown residents feel downtown Winnipeg has become cleaner in the past year ("**Somewhat agree**")

Majority of residents feel downtown Winnipeg has become cleaner in the past year ("**Somewhat agree**")

Majority of students feel downtown Winnipeg has become cleaner in the past year ("**Somewhat agree**")

Majority of office workers feel downtown Winnipeg has become cleaner in the past year ("**Somewhat agree**") ^[2]

CLEAN AND GREEN

Dressed in forest green, the Downtown BIZ Metro Enviro-Team work to keep downtown clean and assist at numerous events throughout the year. This dedicated team of **14 full-time** and **2 part-time members** pick up litter, vacuums sidewalks, water and weed flowers, pressure washes over **58 downtown bus shelters**, maintains **115 bus stops**, removes graffiti and posters, repairs site furniture and clears snow in the winter.

[1] Source: Downtown BIZ Member Survey, 2013

[2] Source: Downtown BIZ Trends Survey, 2013

Downtown is a Transportation Hub

With an expected growth of 240,000 people and 88,000 jobs in the capital region by 2031, our city will face continued pressure to grow outward. Now more than ever will we require demonstrated leadership in the implementation of our vision for transportation in our city and in our downtown.

Transportation is a catalyst for growth and change, and by that same token, is a critical piece in moving people in and out of our downtown. To achieve the vibrancy we desire in our downtown, our city needs to prioritize and invest in greater transportation options as this will help reduce Winnipeg's reliance on travel by car. Increasing transportation choice in our city will significantly improve our quality of life and will present a better, more positive snapshot of our city and our downtown to the rest of the world.



Connection to 2 kilometres of weather protected walkway system with easy indoor access to 3,733 parking stalls, numerous buildings or nearby bus stops [2]



PARKING

3,757 metered on-street parking spots downtown [7]

35,526 off-street spaces of which 2/3rds are public [7]

150 parking lots

Winnipeg has the most central business district parking of Canadian cities [3]

Winnipeg has the **second lowest** median daily rate at \$9.50 in Canada [4]

Monthly parking rate is an average **\$160/month** while the national average is \$242/month [5]

Six new parkades have been built or are under construction; three more are proposed [6]

More than **11,000 spots** are available within a three-block walk of the MTS Centre! [6]

People drive downtown to work, in far greater numbers than any other area of the city. Each morning rush-hour more than 45,000 trips are made into the downtown! [1]

Downtown is a Transportation Hub (cont.)

TRANSIT

59 bus routes go downtown

20,000 people use the Portage Avenue bus stops each weekday

17,500 people use the Graham Avenue bus stops each weekday

28,000 people use Rapid Transit daily

1,641 people use the free Downtown Spirit each weekday (June)

ACTIVE TRANSPORTATION

Cycling up citywide by **60%** since last Trends (2009) ^[9], with approximately **6,200** cyclists commuting downtown weekdays (2012) ^[8]

Multi-use path up by **80km to 195km**

Bike lanes now **35 kms**

Bike Boulevards **56 kms**

Over **100 bike racks** installed in the downtown area since 2010 ^[7]

More than **6** out of **10** trips made within the downtown are made by foot!

Citywide it is less than 1 in 10! ^[11]

21% of trips in the downtown are made by walking/cycling vs. **11%** averaged throughout the rest of the city ^[12]



HOW DO PEOPLE GET DOWNTOWN?

Trips by Travel Mode ^[13]

People who live and travel within downtown walk to their destinations about six times more than the city as a whole

Top five origins of trips to downtown (AM peak): Tuxedo, River Heights, Fort Garry North, Fort Rouge, Windsor Park/Southdale/Island Lakes

Trips to downtown during morning rush-hour is 46,371, with 9% of these trips from outside of the city

Downtown population makes fewer daily trips than rest of city (2.73/day vs. 2.83/day)

	From District	To District	Within District
Auto Driver	64,980 (57.28%)	65,210 (57.13%)	5,960 (19.86%)
Auto Passenger	15,550 (13.71%)	15,660 (13.72%)	2,030 (6.76%)
Winnipeg Transit	23,340 (20.57%)	23,560 (20.64%)	2,340 (7.80%)
Park & Ride / Kiss & Ride	300 (0.26%)	520 (0.46%)	20 (0.07%)
Bicycle	1,100 (0.97%)	1,180 (1.03%)	180 (0.60%)
Walk	6,410 (5.65%)	6,640 (5.82%)	19,090 (63.61%)
Other	1,760 (1.55%)	1,380 (1.21%)	390 (1.30%)
	113,440 (100.00%)	114,150 (100.00%)	30,010 (100.00%)

Mode shares in Winnipeg

Auto Driver: 64.8

Auto Passenger: 15.8

Public Transit: 8.0

Park & Ride, Kiss & Ride: 0.2

Bicycle: 0.07

Walk: 9.5

City of Winnipeg

Trips/person: 2.83/day

Vehicles/person: 0.59

Person's/household: 2.39

Daily trips/household: 5.92

Vehicles/household: 1.41

Downtown Winnipeg

Trips/person: 2.73/day

Vehicles/person: 0.37

Person's/household: 1.65

Daily trips/household: 4.09

Vehicles/household: 3.61

[1] Winnipeg Area Travel Survey, 2007

[2] Downtown Walking Guide, 2013

[3] Downtown Parking Strategy, 2011

[4] Colliers Parking Rate Survey, 2012

[5] Colliers Parking Rate Survey, 2012

[6] IUS, 2013

[7] Downtown BIZ, 2013

[8] Winnipeg Transit, 2013

[9] Bike Winnipeg

[11] 2011 Winnipeg Parking Strategy

[12] Pedestrian & Cycling Strategy Research, Susan Friegg (2013)

[13] 2007 Winnipeg Area Travel Survey

Results, Final Report (2009)

Downtown is a Pedestrian Hub

Living downtown means the excitement of the urban lifestyle lies right at your doorstep.

When we break it down in numbers, downtown Winnipeg is indeed very walkable. It scores between 88 and 98 out of 100 on the Walk Score website. Walk Score rates the walkability of cities and smaller urban areas, measuring the distance between a particular address and its proximity and locality to various services and amenities.

Winnipeg as a whole rates poorly on Walk Score: 53 out of 100 ^[1]

Downtown scores an A+ on Walk Score: 88-98 out of 100 ^[1]

Area	Walk Score out of 100	Rating	Transit Score out of 100	Rating
Assiniboine and Hargrave	88	Very Walkable	81	Excellent
Waterfront Drive and Bannatyne	93	Walker's Paradise	90	Rider's Paradise
Princess and Bannatyne	97	Walker's Paradise	91	Rider's Paradise
Carlton St. and Qu'Appelle Ave	98	Walker's Paradise	90	Rider's Paradise

PEDESTRIAN COUNTS (2012 COUNTS)

SW Corner of Graham and Hargrave: Average of 2,408 people travelling East and West from 7AM to 7PM weekdays (Survey sample: Week of August 8). ^[2]

NE Corner of Portage and Donald: Average of 5,872 people travelling East and West from 7AM to 7PM weekdays (Survey sample: Week of August 8). ^[2]

Walkway between MTS Centre and cityplace: Average of 8,717 people travelling North and South from 7AM to 7PM weekdays. (Survey sample: Week of October 18). ^[2]

[1] www.walkscore.com

[2] Downtown Winnipeg BIZ, 2012

Visit us online at www.downtownwinnipeg.com for more pedestrian counts!



Downtown is a Green Place

Green spaces help foster connections between communities and the natural environment, allowing for a more breathable and liveable city. Downtown Winnipeg strives to increase and maintain the amount of green space available to residents, visitors and workers.

Winnipeg has about 8 million trees in its forest canopy, with an estimated 2,780 trees on boulevards and in parks in the downtown area. ^[1]

Peg City Car Co-op has three car-share cars downtown: The Legislature, University of Winnipeg, and Broadway and Garry parking lot. ^[2]

There is 440,000 m² of green space downtown. ^[4] Full listing of green spaces online at www.downtownwinnipeg.com.

GREEN ROOFS

4 buildings with green roofs downtown ^[4]

Green roofs:

Mountain Equipment Co-op

Hydro Building

Millennium Library Park

Red River College Paterson GlobalFoods Institute (Union Bank Tower)

OTHER GREEN BUILDINGS INITIATIVES ^[4]

Other Initiatives:

Centrepont

Mixed use – Commercial

Targets Green Globe certification

The Forks

Commercial – Museum

Variety of initiatives

Downtown is a Green Place

BOMA BEST/GREEN GLOBES

There are 26 buildings BOMA BEST/Green Globes certified ^[5]

Name	Type
305 Broadway	Office
155 Carlton	Office
161 Portage Ave. East	Office
200 Graham Ave	Office
201 Portage Ave	Office
360 Main St.	Office
363 Broadway	Office
400 St. Mary Ave.	Office
444 St. Mary Ave.	Office
CBC Winnipeg – 541 Portage	Office
Canadian Grain Commission – 303 Main St.	Office
cityplace – 234 Donald St.	Office
Civic City Complex (City Hall) – 510 Main	Office
Customs Examining Warehouse – 145 McDermot	Office
Great-West Life – 60 Osborne	Office
Great-West Life – 60 Osborne	Office
Investors Group – 447 Portage	Office
MTS Place – 333 Main St.	Office
MTS Place – 191 Pioneer Ave	Office
MacDonald Building – 344 Edmonton St.	Office
Red River College Princess Street Campus – 160 Princess	Education
Richardson Building – One Lombard Place	Office
Royal Bank Building – 220 Portage Ave.	Office
Stanley Knowles Building – 391 York Ave.	Office
Victory Building – 269 Main St.	Office
Winnipeg Convention Centre – 375 York Street	Office
Winnipeg Union Station – 123 Main St.	Office

LEED BUILDINGS

15 LEED certified buildings (or awaiting certification) [3]

Manitoba Hydro Place – 360 Portage Ave.	Office	LEED Platinum
ft3 office: The Strand on Waterfront Drive	Mixed use	LEED Gold
U of W: McFeetors Hall: Great West Life Student Residence	Multi-Unit Residential	LEED Silver
U of W: UWSA Daycare	Daycare	LEED Silver
RBC Portage and Edmonton Branch	Commercial	LEED Gold
Entegra Credit Union Ltd. Disraeli Branch	Commercial	LEED Certified
Winnipeg Mountain Equipment Co-operative	Retail Commercial	LEED Gold
U of W: Richardson College for the Environment	Education -Science	Targets LEED Silver – awaiting certification
AA Heaps Building : 4th Floor Renovation	Government Office	Awaiting certification
U of W: Buhler Center – 460 Portage	Education / ArtGallery	Targets LEED Silver – awaiting certification
Paterson Global Foods – 500-504 Main (Union Bank Tower)	Education – Mixed Use	Targets LEED Gold – awaiting certification
Canadian Museum of Human Rights	Museum	Targets LEED Silver – awaiting certification
Manitoba Children's Museum Welcome Centre	Museum	Targets LEED Silver – awaiting certification
U of W: UNITED Health & RecPlex	Education – Recreation	Targets LEED Silver – awaiting certification

[1] Winnipeg Tree Facts, City of Winnipeg (2013)

[2] pegcitycarcoop.ca

[3] Canada Green Building Council, 2013. Leed Projects in Canada – 2013 Jan 31. Retrieved from www.cagbc.org/leed/projectprofile_EN.aspx

[4] IUS, 2013

[5] BOMA Manitoba (2013). BOMA BEST Building. Retrieved from bomamanitoba.ca/boma-best/list-of-boma-best-buildings/

Want to set up shop downtown?

Downtown Winnipeg has numerous resources and organizations to help you.

Downtown Winnipeg BIZ

426 Portage Avenue
(204) 958-4640

www.downtownwinnipegbiz.com

Represents 1,300 businesses in downtown and runs programs targeting downtown advocacy, image, cleanliness, safety, transportation, parking, marketing and events.

CentreVenture Development Corporation

2nd Floor, cityplace, 88-333 St. Mary Avenue
(204) 954-7733

www.centreventure.com

The City of Winnipeg's downtown development corporation mandated to stimulate downtown revitalization by working with investors and developers to identify opportunities, access incentive programs, create partnerships, form innovative improvement strategies and serve as an accessible conduit to support economic development initiatives.

The Forks North Portage Partnership

259-393 Portage Avenue
(204) 942-6302

www.theforks.com/partnership

A key stakeholder in the development of downtown who is responsible for the ownership, management and continuing renewal of The Forks and North Portage sites. Their mission is to act as a catalyst, encouraging activities for people in the downtown area through public and private partnerships, revitalization strategies; and to work to ensure financial self-sufficiency.

Economic Development Winnipeg Inc.

300-259 Portage Avenue
(204) 954-1997

www.economicdevelopmentwinnipeg.com

Economic Development Winnipeg Inc. (EDW) is focused on being a leader in promoting Winnipeg as the ideal place to live, work, invest and visit through economic development and tourism-related initiatives. EDW embraces a truly collaborative approach in the organizations day-to-day activities, aimed at minimizing fragmentation and garnering the collective wisdom in stakeholder synergies to produce positive results.



Acknowledgements

DOWNTOWN TRENDS ADVISORY COMMITTEE

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centreventure
development corporation





The recent developments in downtown Winnipeg are bringing more people to the city centre to work, live and play. And these people are increasingly optimistic about the future of our city centre. Downtown business owners are also positive about where downtown is headed, recognizing the many opportunities that exist here. Downtown is the place to do business, work, learn, live and play. Its distinct architecture, history, culture, diversity and character create a unique experience for everyone who visits the heart of our city.

For more information, please contact the
Downtown Winnipeg Business Improvement Zone (BIZ)

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www.downtownwinnipegbiz.com

downtown
WINNIPEG BIZ



Mixed Sources

Product group from well-managed
forests, controlled sources and
recycled content fiber
www.fsc.org Cert no. [SCOC-002520](https://www.fsc.org/certificates)
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