

APPENDIX E
Resident Survey
Final Report

October 2005

MADOC RESULTS



MAIN STREET
REVITALIZATION INITIATIVE
Tweed Madoc Marmora Stirling



Introduction

In early summer 2005, the Main Street Revitalization committees in Centre Hastings, Marmora, Stirling and Tweed committed to researching the attitudes and opinions of the residents of their respective hometowns. More specifically, the committees sought residents' feedback on the subject of each community's downtown district and its retail and service providers. The committees decided to conduct a detailed resident survey that would accomplish these goals, as well as aid in the formation of an overall strategic plan for each downtown. As the *Rues Principales* and *Main Street* revitalization guidelines assert, it is essential that residents have the opportunity to contribute to their community's strategic plan in order for such a plan to be successfully adopted and implemented. The resident survey allowed each resident of these four communities to voice their opinions on the existing businesses, the physical atmosphere, and the cultural, recreational and entertainment opportunities that their downtown provides. The information and input that each resident contributed will be extremely valuable as the Main Street management committees form both short and long term strategic plans for each town.

Method

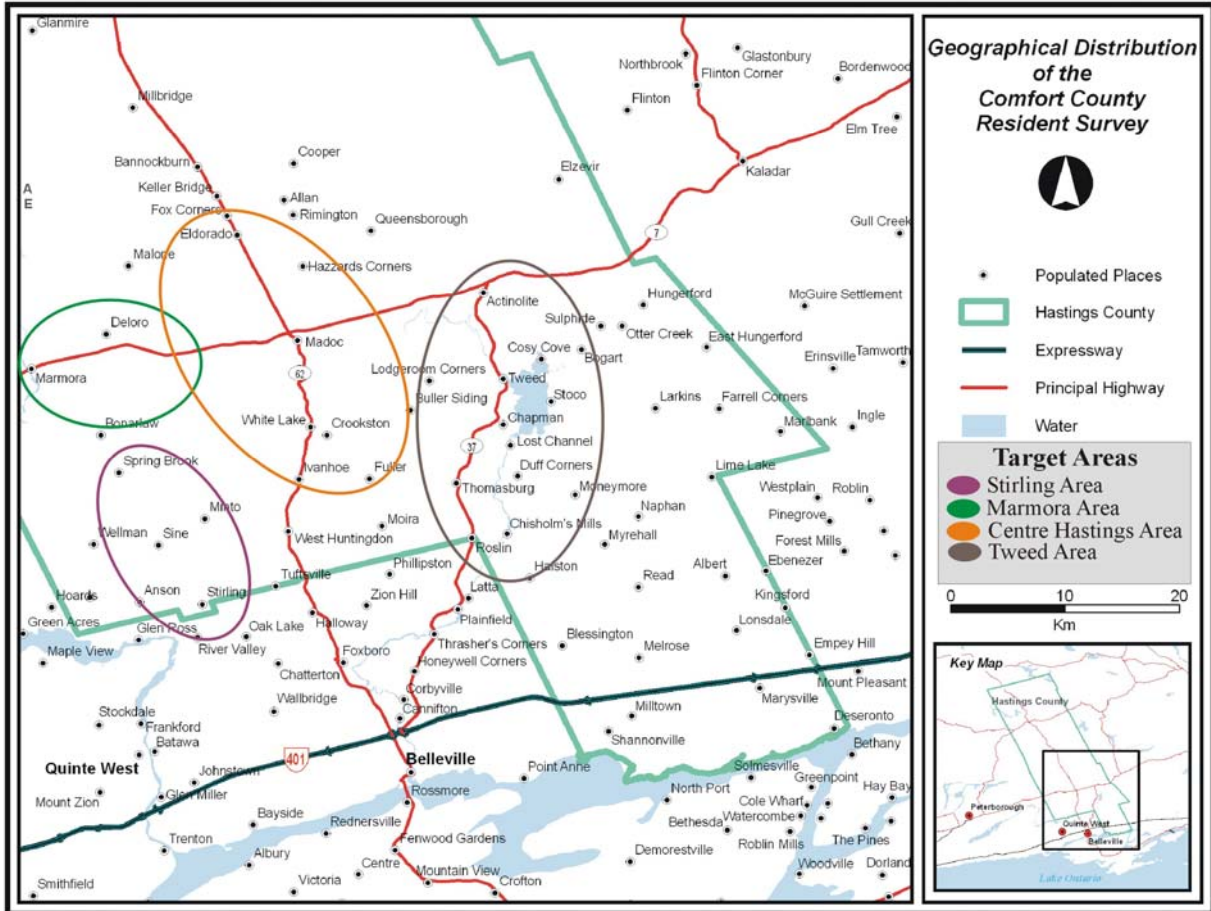
The resident survey was prepared using guidelines provided by the *Rues Principales* and the *Main Street* programs. Survey questions were developed by modifying resident and consumer surveys already in existence, as well as by creating new questions that addressed issues unique to communities in the Central Hastings region.

The survey was distributed as an insert in selected circulation areas of *The Community Press* (Eastern Edition) newspaper and *The Shield* newspaper during the final week of June 2005. These two newspapers are distributed to every household in the Central Hastings area free of charge. An online version of the survey was also available. Residents of each area were asked to complete the hardcopy version of the survey (or complete the survey online) and return the questionnaire to one of the local retailers listed on the survey, or by mailing the completed survey to their municipal office.

It was requested that the completed surveys be returned within two weeks time, at which point the results of the survey were tabulated and analysed.

Area Targeted

Each of the four communities were easily targeted using distribution breakdowns already established by each newspaper. There was little variance between the distribution of the two papers, and a total of 11,362 different households were targeted.



The specific breakdown by community area is listed below.

Area	Communities Included	Postal Code	Number of Households
Centre Hastings Area	Madoc & Rural Routes	KOK 2K0	2143
	Eldorado	KOK 1Y0	402
	Gilmour		353
	Total – Centre Hastings		2898
Marmora Area	Marmora & Rural Routes	KOK 2M0	2055
	Total – Marmora		2055
Stirling Area	Stirling & Rural Routes	KOK 3E0	2693
	Springbrook & Rural Routes	KOK 3C0	180
	Total - Stirling		4928
Tweed Area	Tweed & Rural Routes	KOK 3J0	2491
	Roslin	KOK 2Y0	579
	Thomasburg	KOK 3H0	
	Plainfield & Rural Routes	KOK 3H0	466
Total – Tweed		3536	

Survey Response Rate

Residents of each community responded well to the survey. Overall, 1107 surveys were returned, of which 1026 could be analysed. This represents an overall response rate of 9 %, which is favourable considering the typical response rate to a mail in survey is 2-3%¹.

Area	Response Rate	Surveys Analysed	Confidence Interval*
Centre Hastings	10.5%	303	+/- 5.30%
Marmora	7.7%	159	+/- 7.52%
Stirling	8.5%	243	+/- 5.88%
Tweed	8.9%	314	+/- 5.23%

*With a 95% confidence level

The confidence interval indicates the variance between the responses of those people surveyed, and the responses of the overall population of each community. As an example, if it was found that 70% of Centre Hastings *survey respondents* feel that their downtown is safe, it can be safely assumed that between 64.7% and 75.3% of *all residents* of Centre Hastings feel their community's downtown is safe.

Analysis

Each of the four communities was separately analysed once survey results were tabulated. Surveys were separated into community area based on the respondent's postal code, as is detailed above.

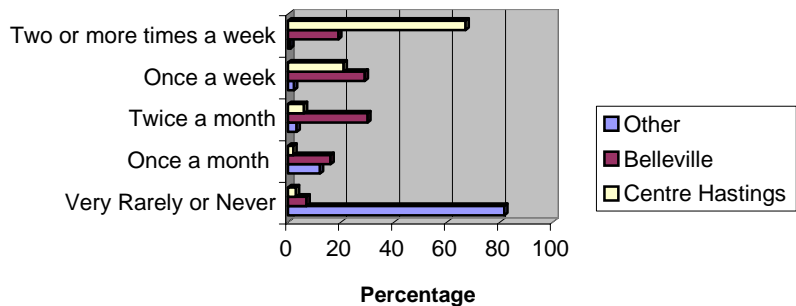
¹ www.websurveyor.com/pdf/webvsmail.pdf

Shopping Frequency & Location

Residents of the Centre Hastings area are shopping in their hometown on a regular basis. Over 80% of residents visit downtown Madoc once a week or more. Comparatively, the second most visited location is Belleville. 48% of Centre Hastings residents shop in Belleville once a week or more. It should be noted that the frequency with which residents are visiting Belleville decreases as their age increases. Seventy percent of residents between the age of 20-44 visit Belleville once a week or more. Forty six percent of between the ages of 45-64 visit Belleville once a week or more, while 38% of residents over the age of 65 visit Belleville over the same time period. Comparatively, the frequency with which residents visit Centre Hastings was not affected by the age of citizens. Also of interest to note is that residents that live further away from Madoc shop downtown less frequently than those that live within close proximity of the downtown.

>Question: How often do you shop at the following locations?

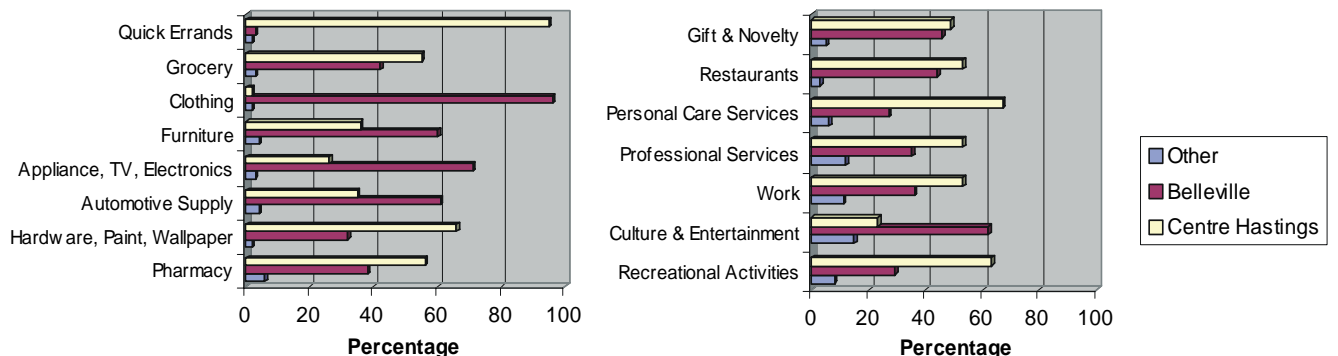
Shopping Frequency in Most Visited Areas



An overwhelming majority of Centre Hastings residents shop in their hometown for quick errands. Groceries are purchased in either downtown Madoc or in Belleville. Madoc serves as the destination to purchase hardware, pharmacy goods, and for personal care services for the majority of its residents. For purchases of clothing, furniture, appliance & electronics and automotive purchases Madoc is not the primary destination. Trends are also noted by age – as residents’ age increases, citizens shop for groceries and pharmacy goods in Madoc more often, and in Belleville less often. There are similar trends by lifestyle – retired individuals shop in Madoc for groceries and pharmacy goods more frequently than non-retired individuals. Non-retired individuals shop more frequently in Belleville than retired individuals for the same items.

Shopping Location by Type of Product/Service

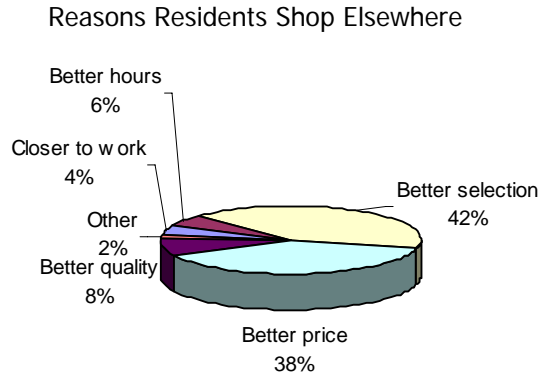
>Question: Where do you travel to for the majority of the following?



Why Go Elsewhere?

Residents of Centre Hastings shop in a location other than in their own community for various reasons. The two reasons that influence residents the most are the better price and the better selection perceived to be offered elsewhere. Whether or not prices and selection are truly superior in other locations requires further research.

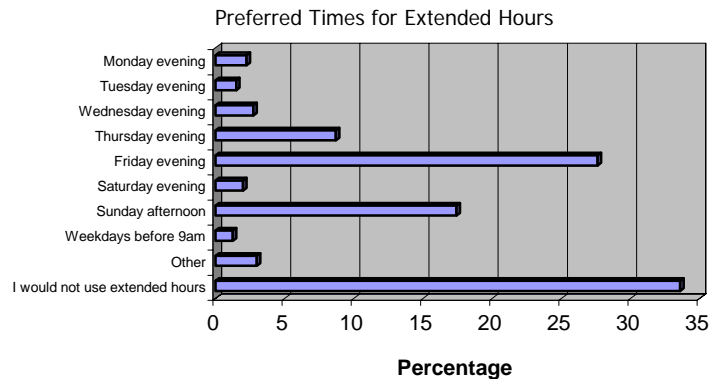
>Question: When you shop in a location other than in your community's downtown, what are the two main reasons why?



Extended Hours

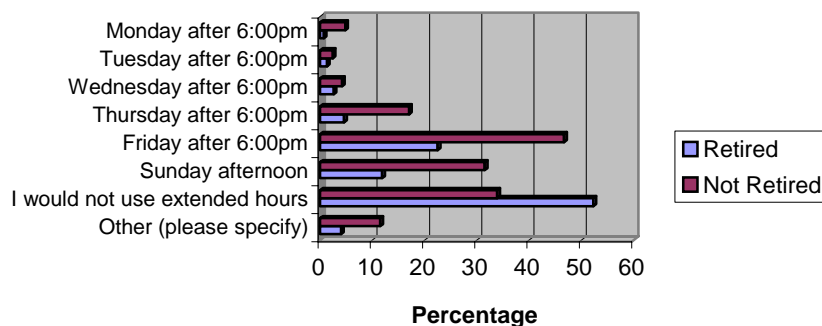
Centre Hastings residents provided their feedback relating to the possibility of extended store hours being offered in the community. Results were mixed: 34% of residents stated that they would not use extended hours. 28% of residents would use extended hours Friday evening, and 17% would use extended hours Sunday afternoon.

>Question: If stores in your downtown offered extended hours, when would you most likely shop?



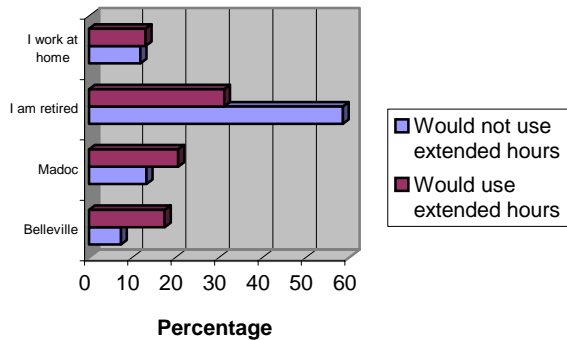
It is important to consider the lifestyles of those people who provided opinions on extended hours in the community. Individuals that are retired stated they would be less likely to use extended hours than those people who are not retired. Furthermore, the non-retired community greatly preferred extended hours Thursdays, Fridays, and Sundays.

Preferred Times for Extended Hours – Retired/Not Retired

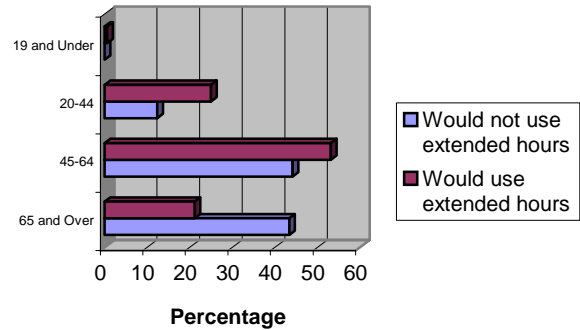


When studying those individuals that stated that they would not use extended hours, it was interesting to note the location in which they were employed. Individuals that worked in Madoc and Belleville were more likely to use extended hours, as were those that worked at home. Not surprisingly, retired individuals were less likely to make use of extended hours. Correspondingly, individuals over 65 were less likely to use extended hours than younger individuals – especially those under the age of 44. A further point of interest was that individuals who stated that they would use extended hours had, on average, lived in the community for a shorter period of time than those individuals that would not use extended hours.

Use of Extended Hours – Workplace Location



Use of Extended Hours – Age

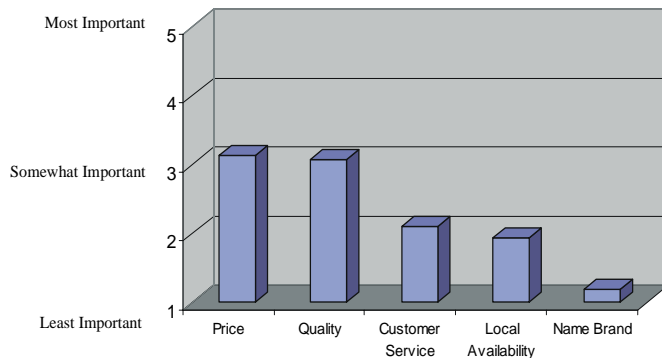


Importance Rankings

Two factors were clearly of the most importance to residents when making their purchasing decisions. To citizens of Centre Hastings, the price and the quality of a good are the factors that influence their purchasing decision the most. Customer service and the local availability of the product were of lesser importance, while the name brand of a good was considered to be the least important.

>Question: Please RANK the importance of the following characteristics on your decision to purchase each good.

Importance Rankings

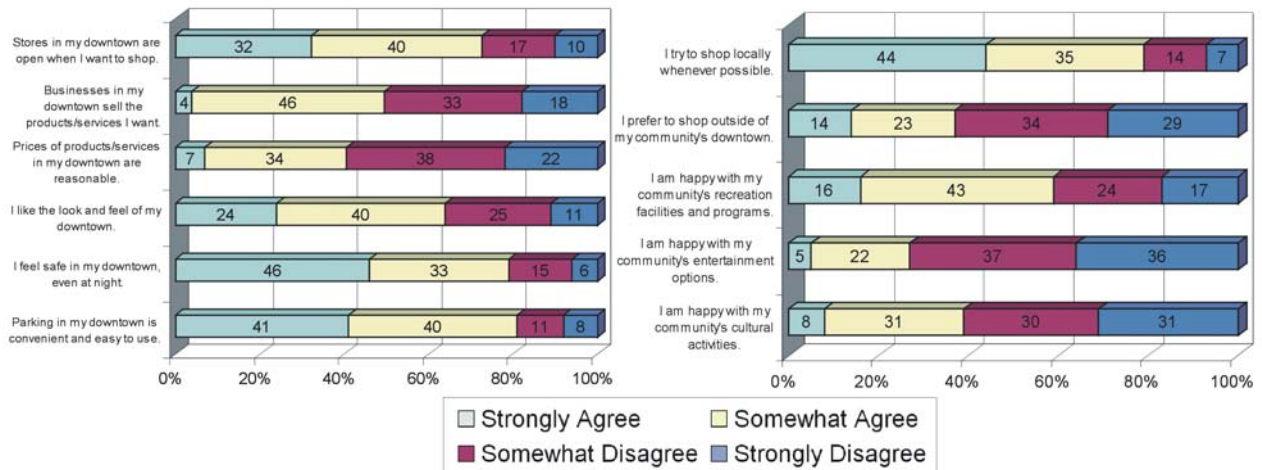


General Opinions

In general, residents agree that stores downtown are open when they want to shop. Citizens also consider Madoc's downtown to be safe, and feel that downtown parking is easy and convenient. The majority of residents also agree that they try to shop locally whenever possible. Nevertheless, residents feel that there are opportunities for improvement within the town. The majority of respondents did not feel that goods and services were offered at a reasonable price. Residents believe that the entertainment options and the cultural activities within the town could be improved as well.

>Question: How strongly do you agree or disagree with the following statements?

Resident Opinions



Upon further analysis, it was found that Centre Hastings residents' satisfaction with their community's recreation facilities and programs increased slightly with age. It should also be noted that residents who indicated that they were happy with their community's entertainment options have an average income level of \$10,000 less than residents that were unhappy with Madoc's entertainment options. Similarly, residents who were happy with their community's cultural activities have an income level of \$20,000 less than those who indicated that they were unhappy with those cultural activities available.

Market Gaps

Centre Hastings residents provided open-ended feedback as to what new retail or service providers they feel are needed in their community. 46% of all survey respondents stated that they would like to see a clothing retailer in the downtown, and 42% would like an additional grocery store in the Madoc community. As detailed earlier, the residents of Centre Hastings place a strong value on the price of a product. It is likely for this reason, that 25% of citizens wish that there were “discount” retailers in their community – either for groceries (22% of all respondents) or for clothing (11% of all respondents). Other frequently mentioned retailers included a Canadian Tire store (13% of all respondents), a shoe store (15% of all respondents), more dining options (12% of all respondents), and an additional bank (8% of all respondents).