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Olafson

# Marda Loop Visitor Profiling Study

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Spring 2021

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# Why we did the research

The Marda Loop BIA represents over 150 businesses in Marda Loop and is responsible for promoting the area. Their role is to advocate and support the businesses and community in the BIA. As such, the Marda Loop sought to conduct visitor research and use the results and information to accomplish the following:

- Understand who current Marda Loop BIA customers are including where they live, demographics and spending habits;
- Better direct BIA efforts and resources and target market like-minded and local customers;
- Understand what improvements to the BIA customers would like to see;
- Help with business recruiting for existing and prospective businesses (a sell-sheet); and,
- Create information for the BIA's member base to use as they see fit.



# How we did the research

A two-phase approach allowed for broader understanding of Marda Loop's visitors and gave ample opportunity for visitors to provide their input.

## Online Survey

### Phase 1 – Online Survey

A total of 556 surveys were completed between April 29<sup>th</sup> and May 31<sup>st</sup>, 2021. The survey was distributed through a wide variety of channels: via Marda Loop's social media accounts and website, and via the BIA's business community and community associations. The survey was also promoted throughout Marda Loop on outdoor advertising with QR codes.

### Phase 2 – Visitor Intercepts

Visitors to Marda Loop were invited to participate in an intercept survey over a one-week period between June 17<sup>th</sup> and 23<sup>rd</sup>, 2021. Visitors were randomly intercepted by professional interviewers throughout Marda Loop and participated in an abbreviated version of the online survey. Their responses were recorded on tablets. As some Covid restrictions were still in place, interviewers wore masks and maintained social distancing at all times. While every effort was made to reach visitors at the five locations noted below, the research team observed visitors were in more of a rush and less likely to participate at locations #3 and #4.

## Visitor Intercepts

The results from both phases of research are incorporated into the following report. The audience being reported is indicated throughout.





# The Story on One Page

## **Marda Loop visitors are largely a local audience, and they are very loyal to the area.**

Marda Loop visitors are primarily drawn to the area from the surrounding communities of 'Marda Loop', Altadore, South Calgary, and Garrison Woods; and they are visiting often! A large majority visit at least once per week but half are making several trips every week. On average, they visit 3 stores/services per trip. Further, visitors are loyal – they are much more likely to frequent Marda Loop than shopping centres, malls or competing BIAs.

While a local audience is key to maintaining the sense of community, and ensuring regular, repeat business, the surrounding communities are limited and Marda Loop will need to draw more visitors from outside its primary trade area in order to promote greater growth and new businesses to the area.

## **Pedestrian friendly spaces are key to making Marda Loop more attractive.**

Because frequent visitors are largely local, many visitors often walk to Marda Loop and nearly all visitors feel safe when they are there. As such, there is demand for the area to become more of a walking destination and more easily accessible. Parking frustrations and a sense that Marda Loop is 'too busy' are stressors that further contribute to the need for improving pedestrian experiences.

There is considerable interest in having more beautification projects and public art in the area. These types of spaces and attractions would enhance all visitor experiences, but especially for those who spend time walking in the area.

## **Groceries are a primary trip purpose but visitors are looking for a more unique and local offerings.**

No doubt, groceries are one of the main reasons visitors frequent Marda Loop (followed by coffee shops, ice cream and retail stores). Visitors also spend the most per visit on groceries compared to other products and services. Clearly, having a large grocery retailer in the area is important. However, when asked what other businesses they would like to see in the area, nearly all visitors point to the need for more unique and local offerings; offerings that set Marda Loop apart and make Marda Loop a target destination.

More specifically, visitors are also looking for more book stores, family and fine dining restaurants, women's clothing stores, and arts stores/galleries.

Conversely, visitors do not want to see more cannabis stores, fast food restaurants, or big box/national retailers in Marda Loop.

## **Communication focused on social media and community signage will only reach current visitors.**

While visitors suggest social media is the best way to communicate about happenings in Marda Loop, only half of visitors currently follow @visitmardaloop on at least one platform. Signage in the community and newsletters will also help reach current visitors.

In order to reach beyond their current visitor base though, Marda Loop might need to consider more broad-reaching traditional media channels such as radio. Earned media on television about events or happenings in Marda Loop would also assist with these efforts.



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# VISITOR PROFILE



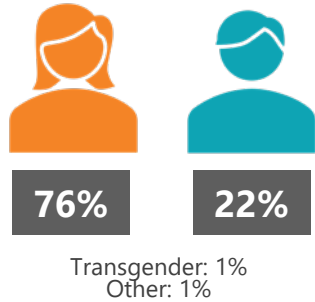


Online Survey  
(n=556)

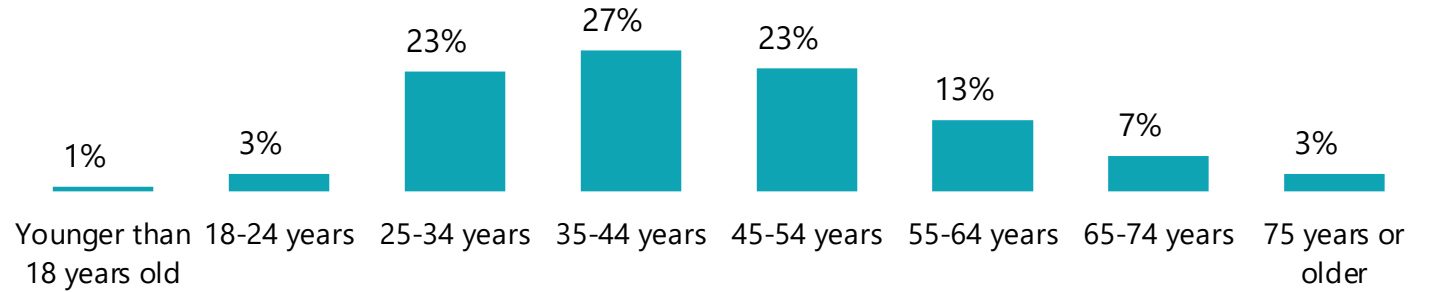
# Who we heard from

Respondents of the online survey tended to be female, aged 25-54 years who work full time and are part of a couple with or without children.

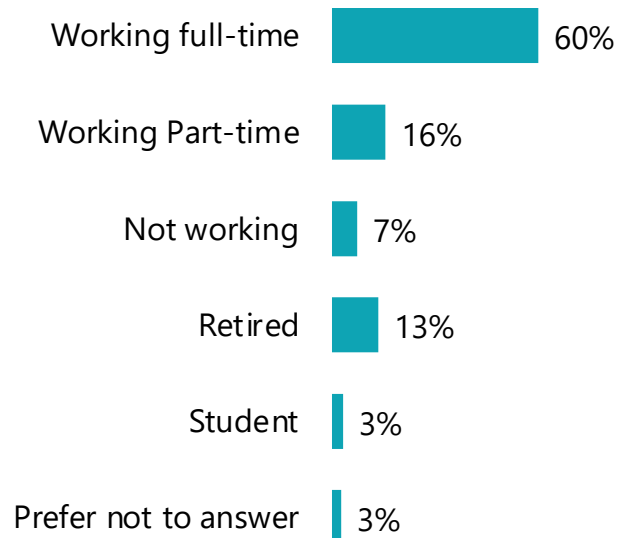
## Gender



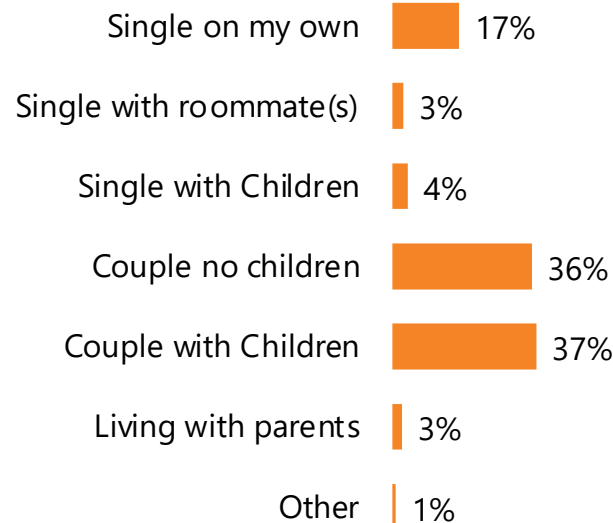
## Age



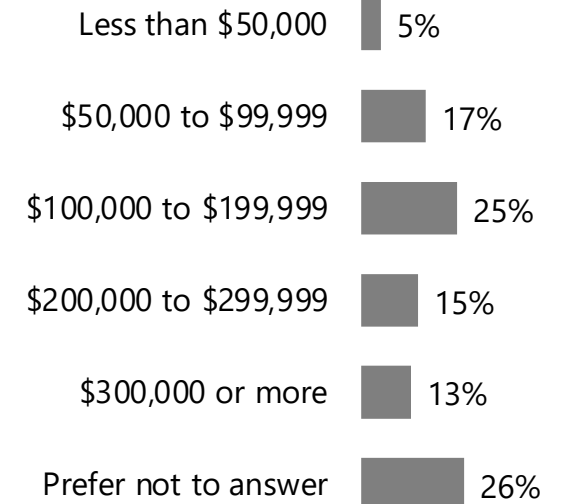
## Employment Status



## Household Composition



## Household Income



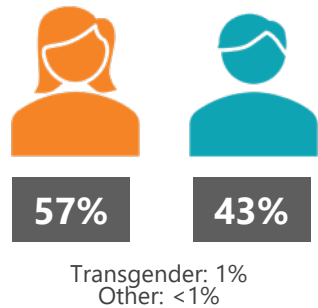
Visitor Intercepts (n=320)

# Who we spoke with

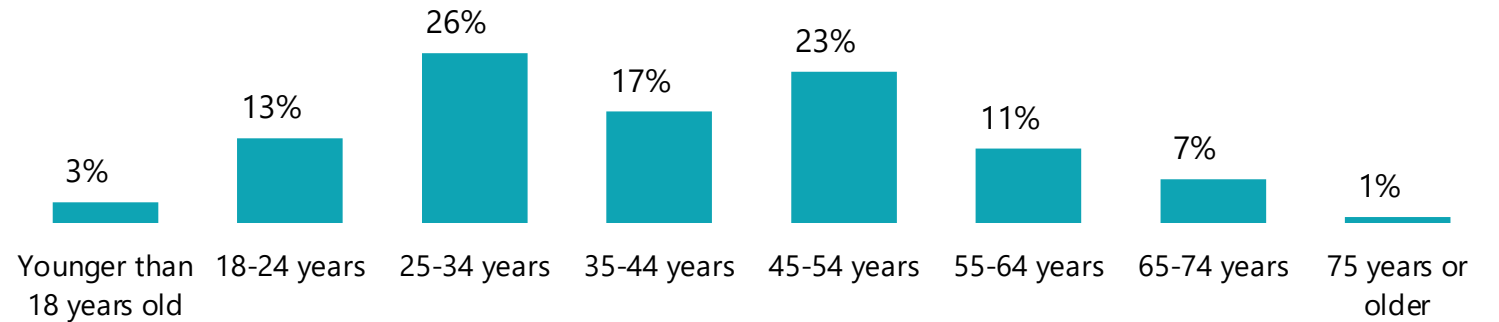
Visitor intercept respondents were more balanced in gender and represented a greater proportion of younger visitors; especially 18-24 year olds.



## Gender



## Age



**Note:** Employment, household composition and household income were not asked of intercept respondents due to sensitivities providing this information in-person.



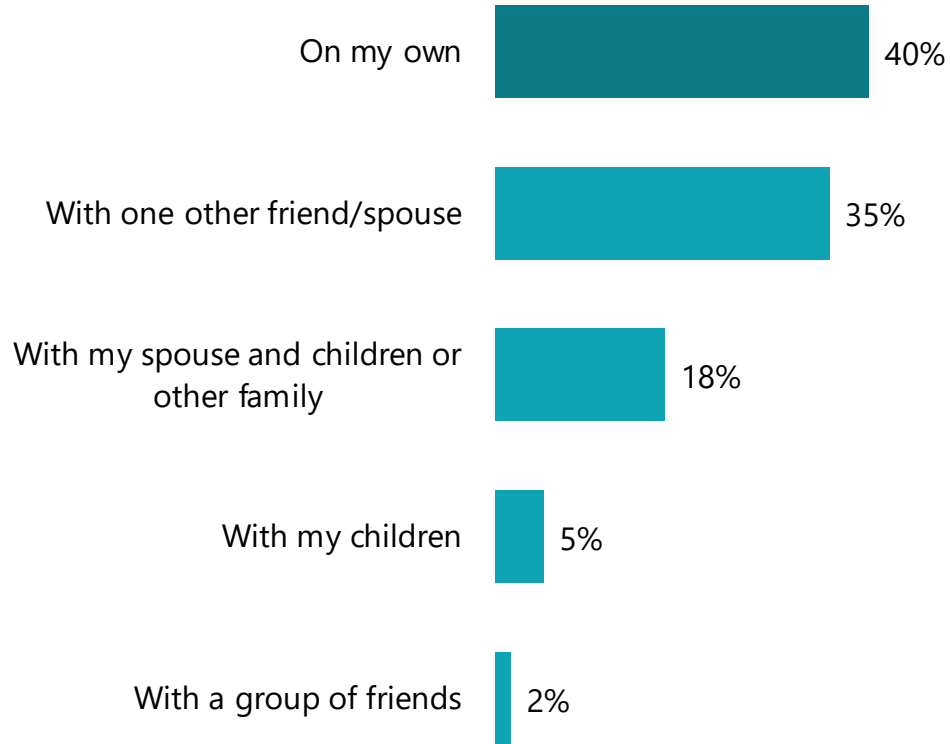


Online Survey  
(n=556)

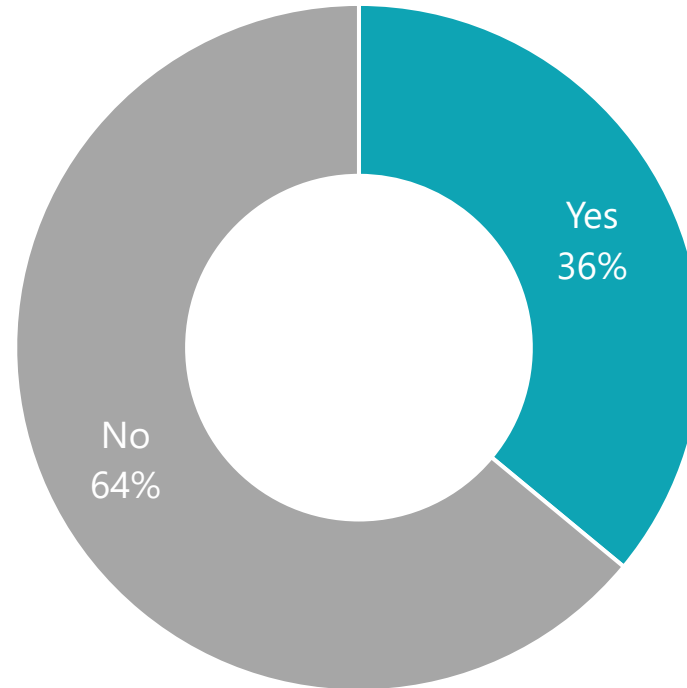
# Who do they visit Marda Loop with?

Most Marda Loop visitors come to the area on their own or with just one other friend or spouse. Families with children are less frequent visitors which aligns with household composition (60% do not have children). Interestingly, visitors are more likely to bring their pets to Marda Loop than children.

Visit Marda Loop With...



Bring Pets to Marda Loop



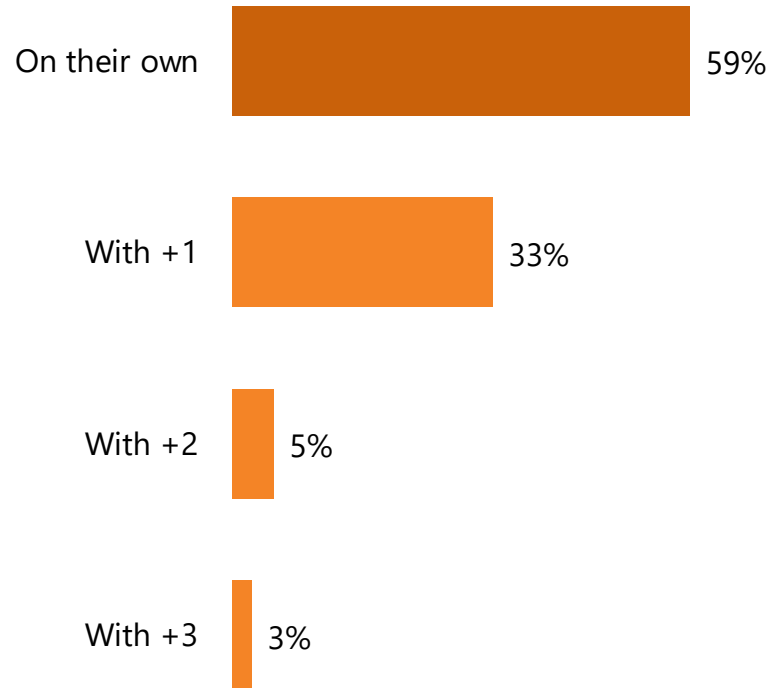
Base: All respondents (n=556)  
Q5. When you visit Marda Loop, which best describes who you typically visit with?  
Q6. Do you have a dog or other pet that you bring with you to Marda Loop?

Visitor Intercepts (n=320)

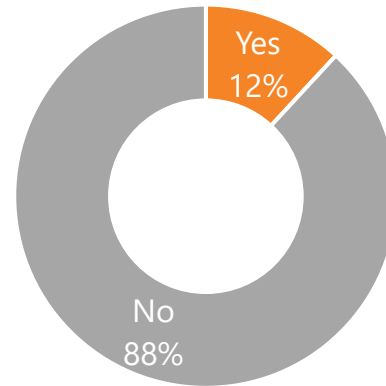
# Who were visitors with?

Visitors we spoke with also tended to be visiting Marda Loop on their own or with just one other person. Although they were less likely than online respondents to have kids or pets with them, this is likely because these would impede the ability to stop and be interviewed.

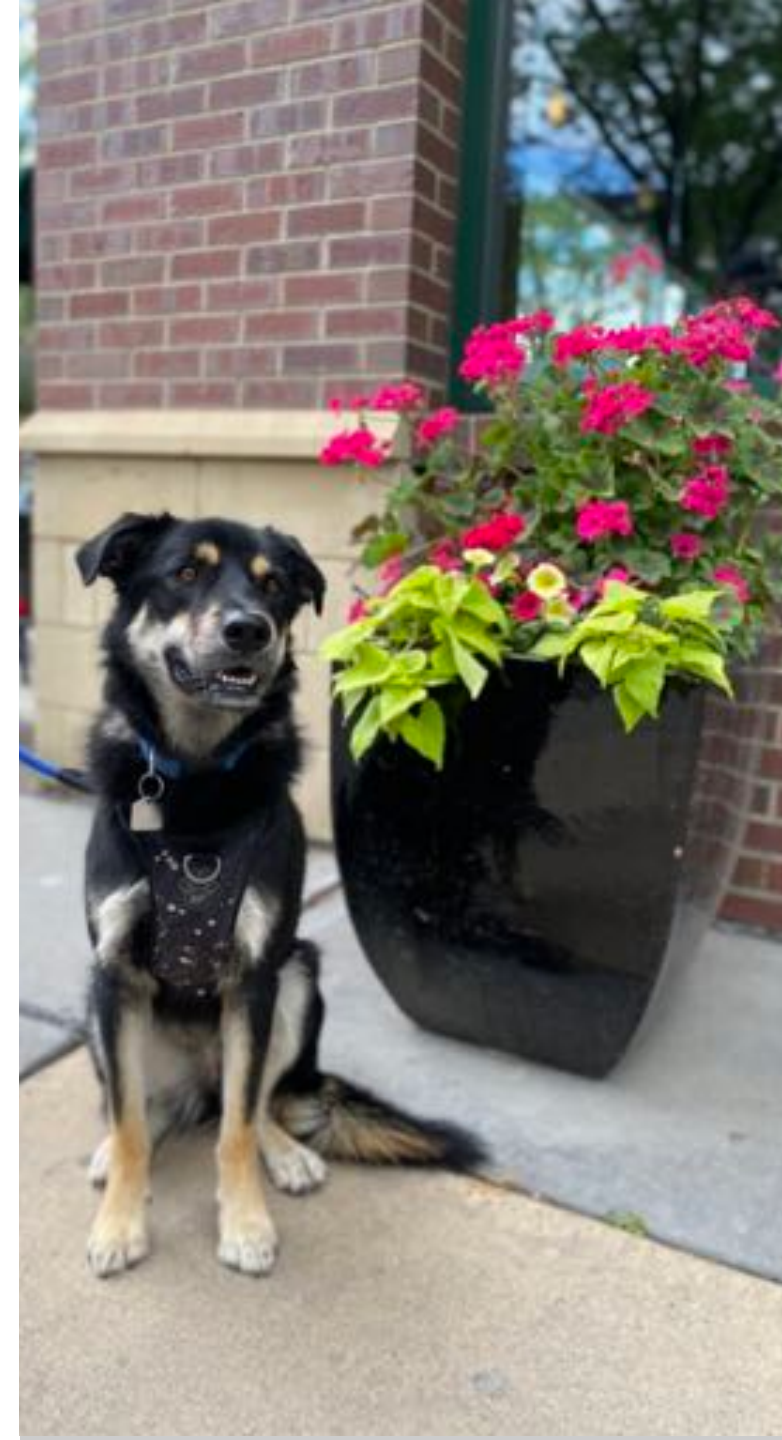
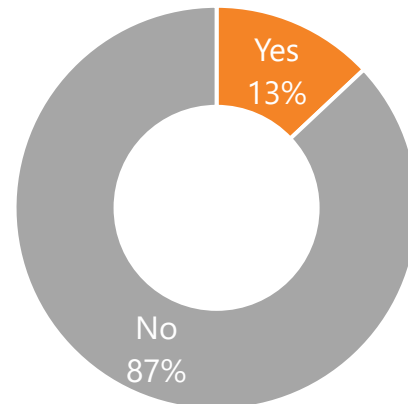
## Came to Marda Loop with?



## With kids?



## With pet?



Base: All respondents (n=320)  
Q5. When you visit Marda Loop, which best describes who you typically visit with?  
Q6. Do you have a dog or other pet that you bring with you to Marda Loop?



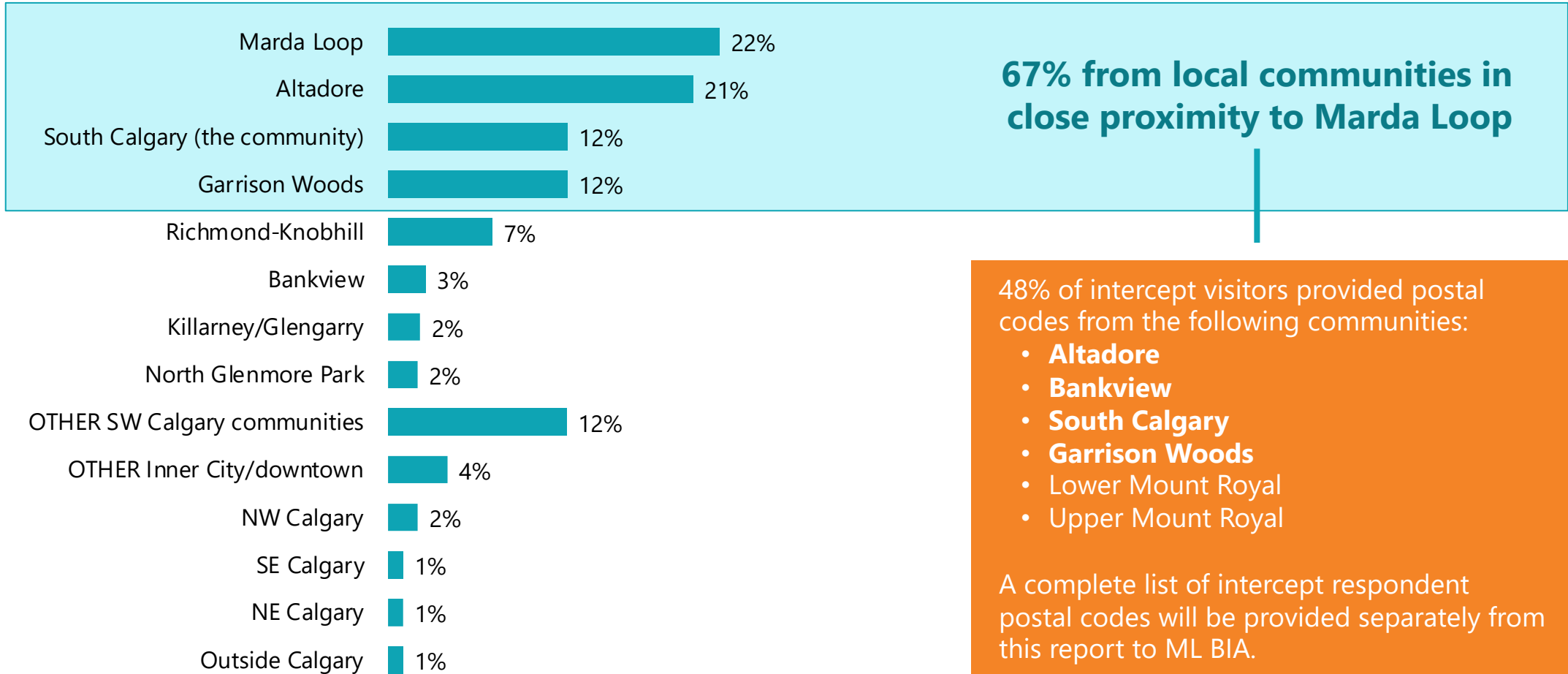
Online Survey  
(n=556)

Visitor Intercepts  
(n=320)

# Where do Marda Loop visitors live?

Marda Loop visitors are largely local. They tend to be drawn from nearby communities: "Marda Loop", Altadore, South Calgary, and Garrison Woods.

## Visitors' Communities







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# FREQUENCY AND PURPOSE OF VISITS



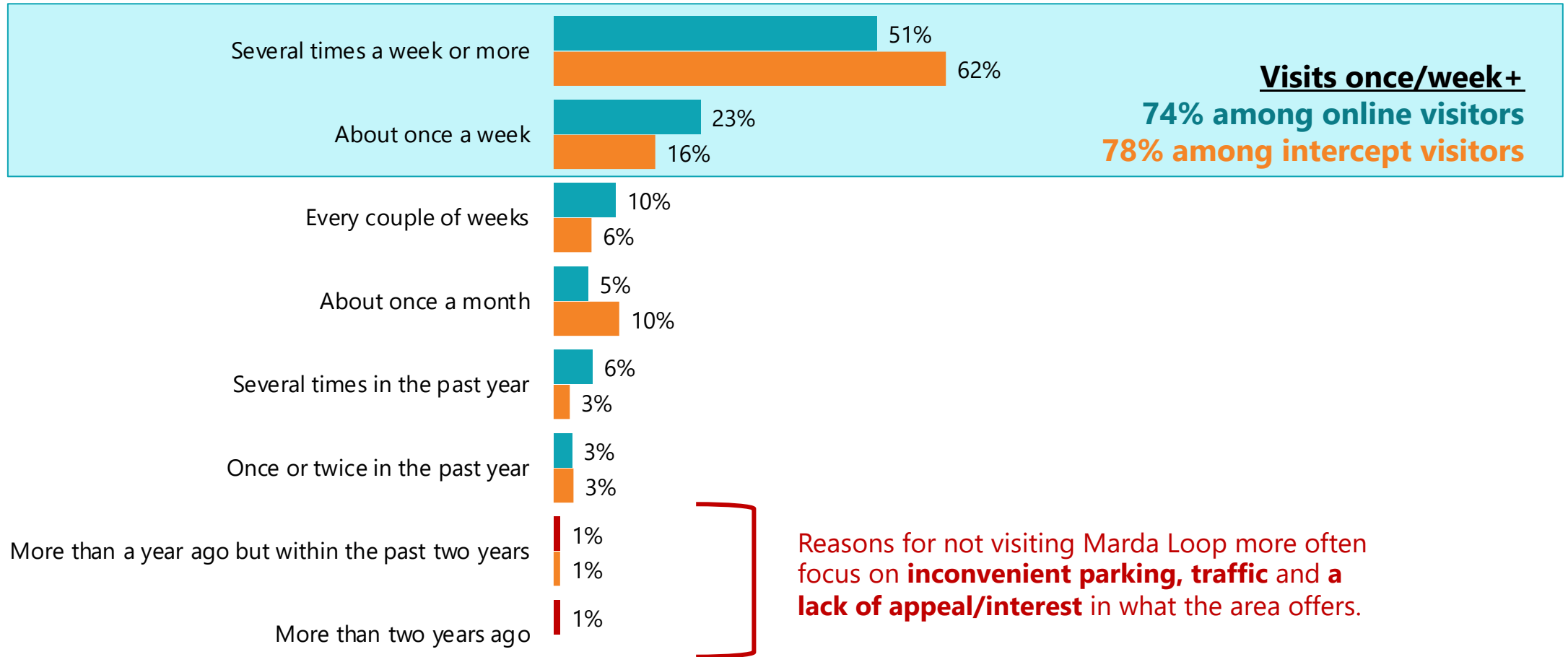


# How often do visitors shop at Marda Loop?



Marda Loop visitors frequent the area often. A majority visit the area at least once per week, and more than half visit several times per week or more.

### Visits to Marda Loop in the Past Two Years



Base: All respondents (online survey respondents n=556)  
Q1. When it comes to destinations in Calgary to go for shopping, dining and other services, how often have you been to the following in the past two years?

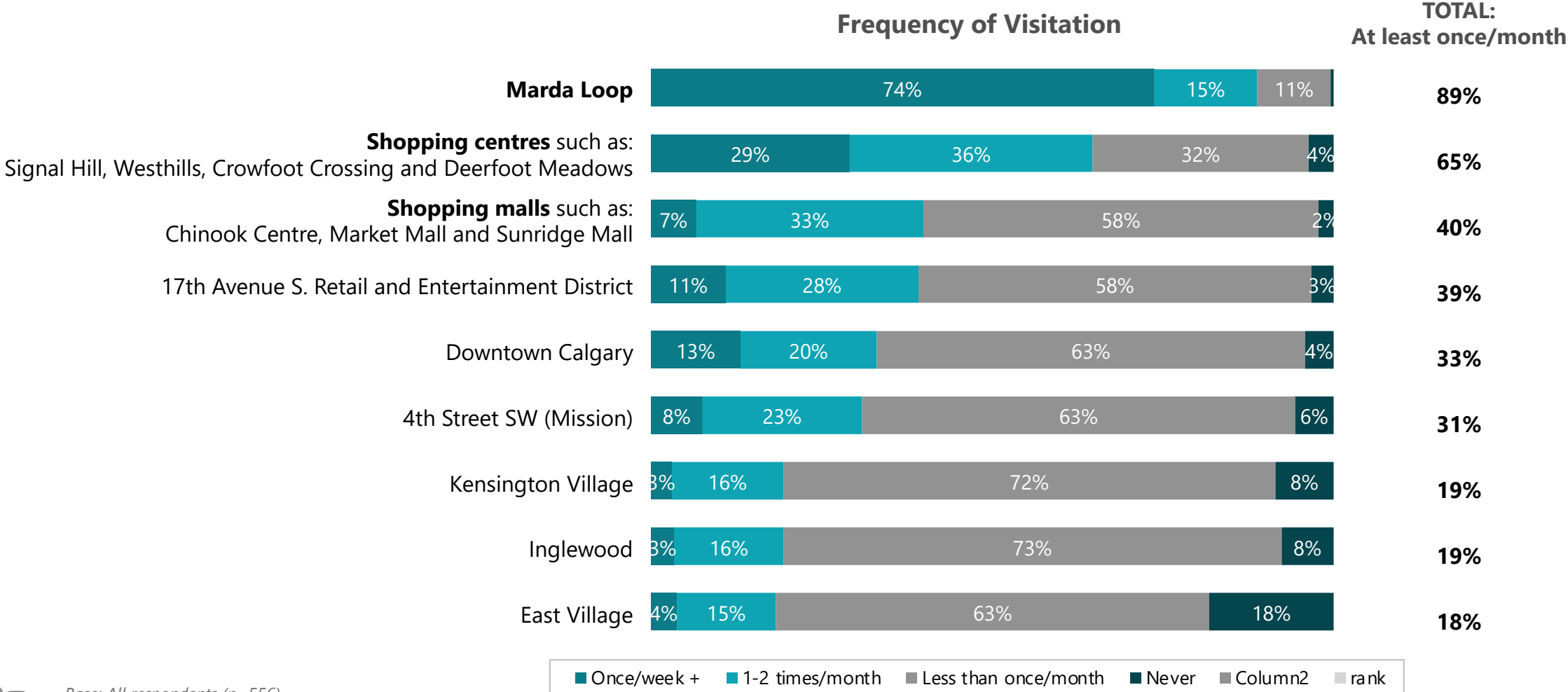
Base: All respondents (visitor intercept n=320)  
Q4. How often do you visit the stores, restaurants and/or services in Marda Loop



# Where else are Marda Loop visitors shopping and dining?



Most Marda Loop visitors are fairly regular and loyal visitors: three-in-four frequent the area at least once per week. While two-thirds also visit shopping centres regularly, less than half are mall shoppers. Marda Loop visitors don't tend to be drawn to competing retail and business districts (17<sup>th</sup> Ave BIA, 4<sup>th</sup> Street BIA, Kensington, Inglewood, etc.)





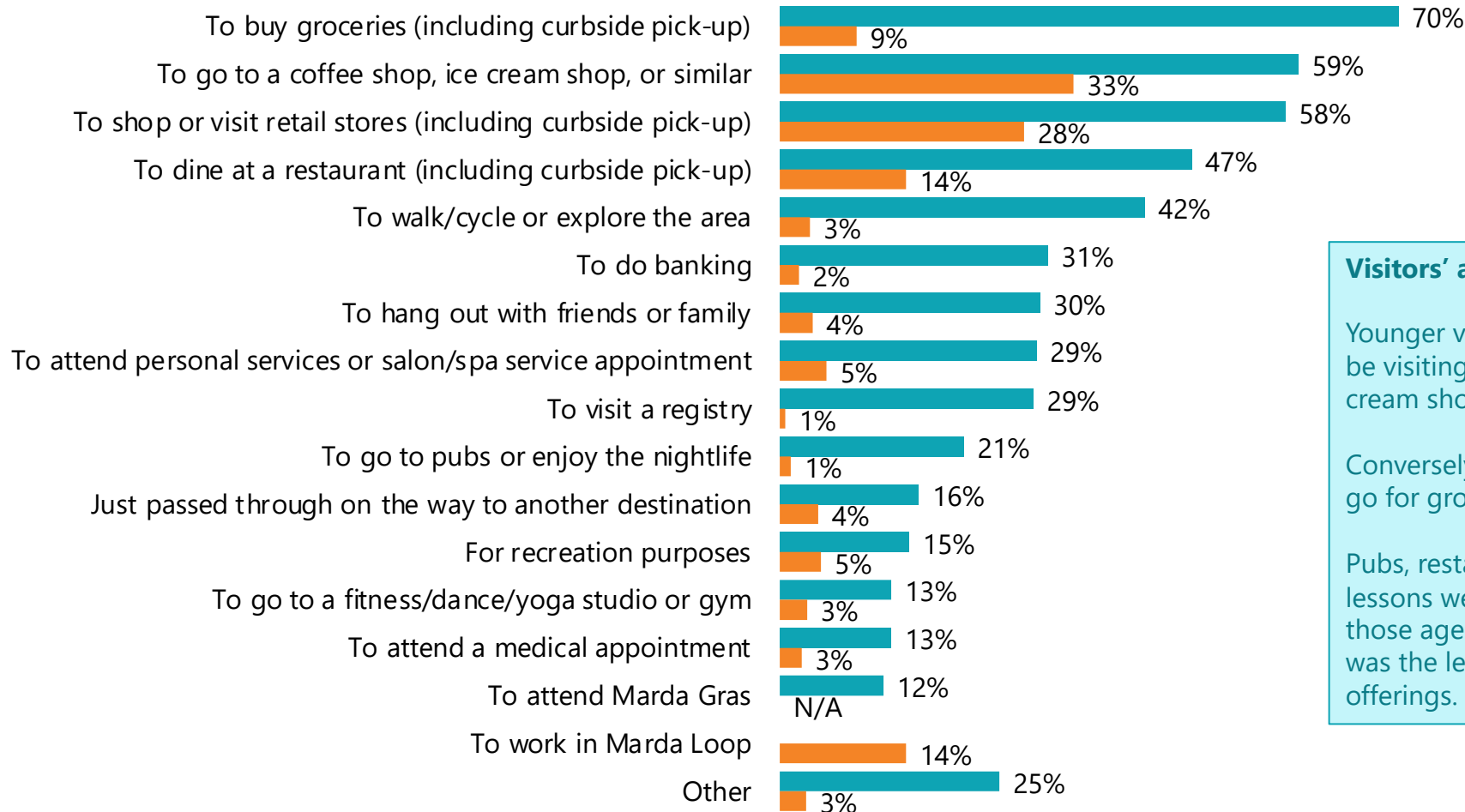


# Why are they coming to Marda Loop?

There are some notable differences in trip purpose between visitors, likely attributed to the context of when they last visited Marda Loop. Visitors from the online survey were also more likely to mention multiple reasons for their past trip, compared with 80% of intercept visitors who were in the area for a single purpose.



## Trip Purpose



**Visitors' age is a predictor of trip purpose.**

Younger visitors (18-34 years) were more likely to be visiting Marda Loop to go to a coffee or ice cream shop.

Conversely, visitors aged 35+ were more likely to go for groceries or banking.

Pubs, restaurants, fitness studios and children's lessons were more common draws to the area for those aged 35-44 years. However, this age cohort was the least likely to visit Marda Loop's retail offerings.

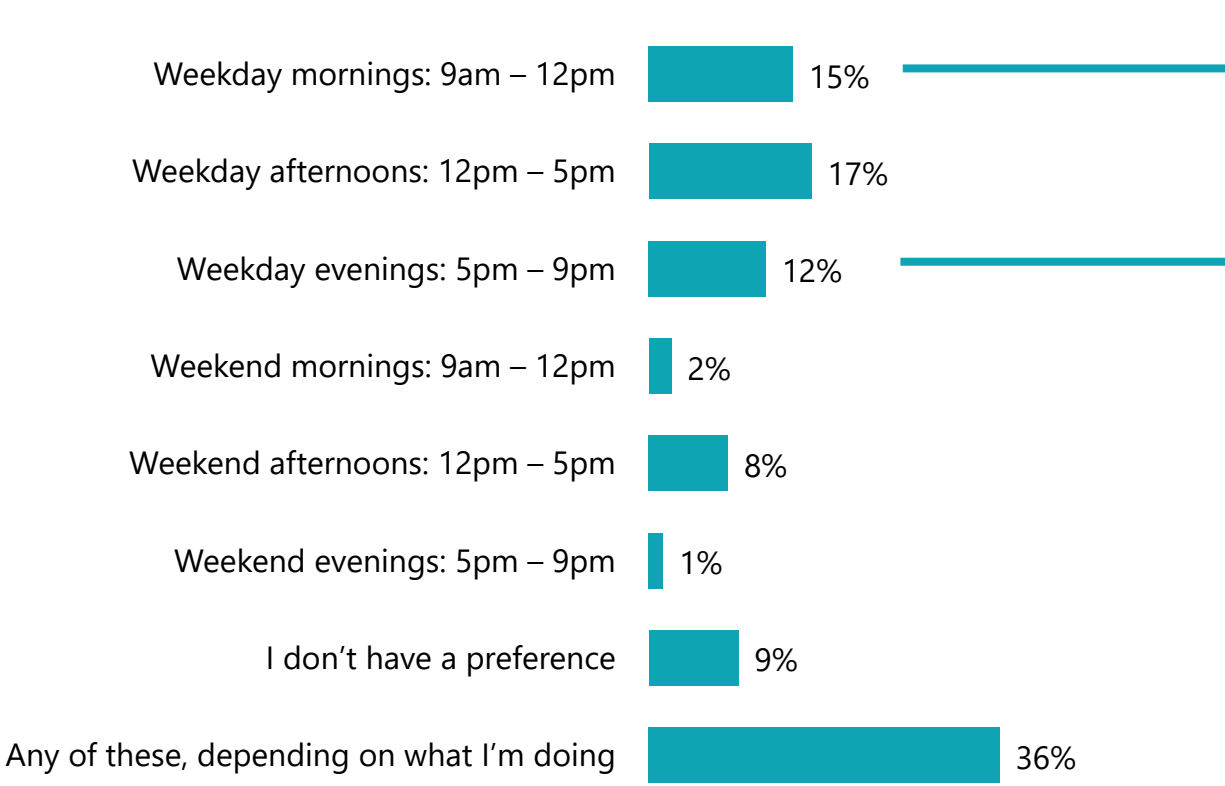


# What time of day do they prefer to visit?



Weekdays are preferred over weekends for shopping and personal service appointments but a sizeable minority of visitors have no real preference or the timing of their visit depends on what they're doing.

### Preferred time of visit for shopping and personal service appointments



Weekday mornings preferred by those aged 55+, those not employed full time, and those who visit Marda Loop on their own.

Weekday evenings are preferred more often by visitors aged 18-34 years, those who work full time and those who usually visit with one other friend or spouse.

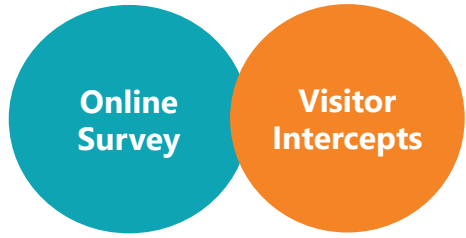


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# TRANSPORTATION AND PARKING





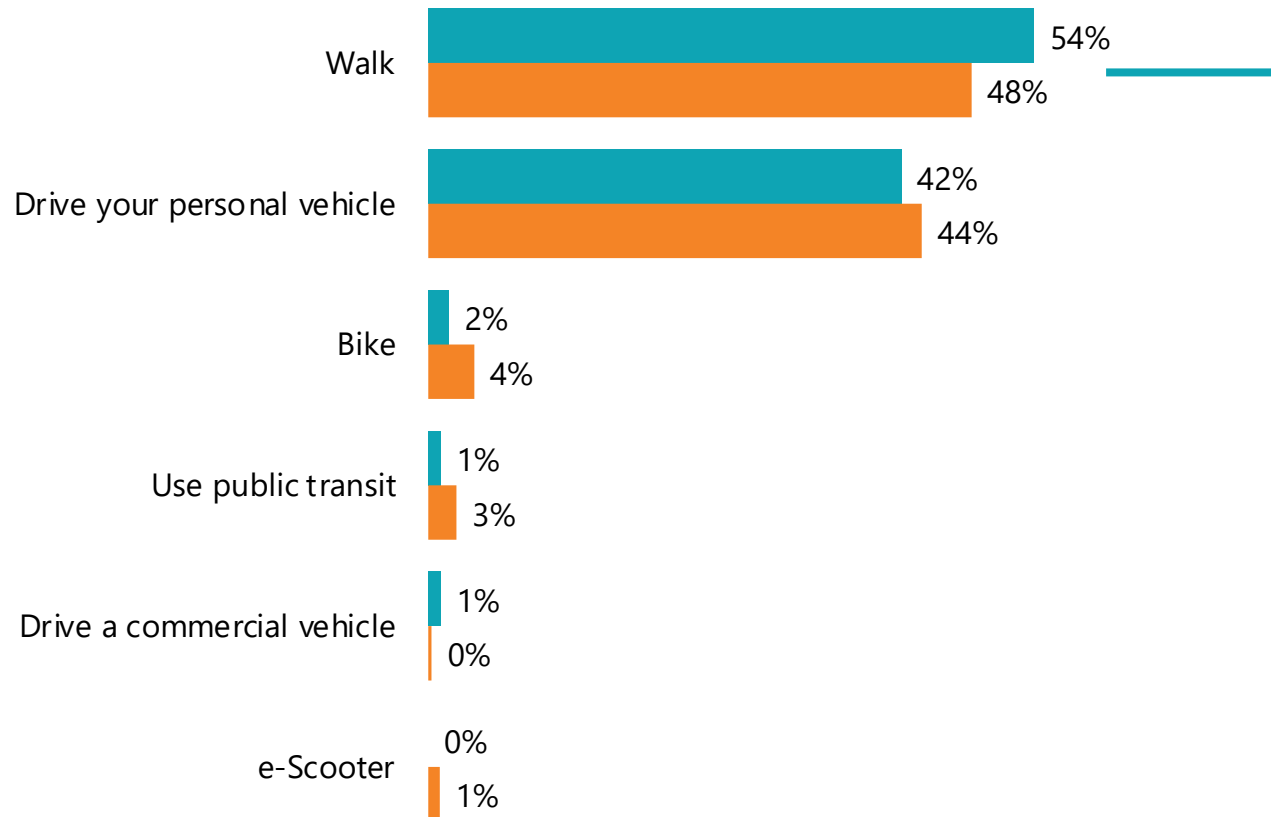


# How do visitors get to Marda Loop?

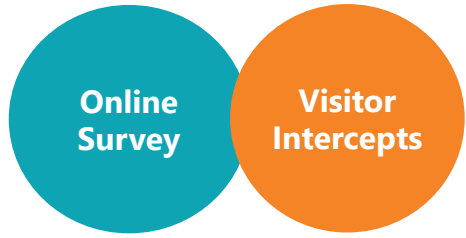


Half of Marda Loop visitors walk to the area from home – not surprising given they come from nearby communities. Most others drive their personal vehicles.

### Method of Transportation to Marda Loop



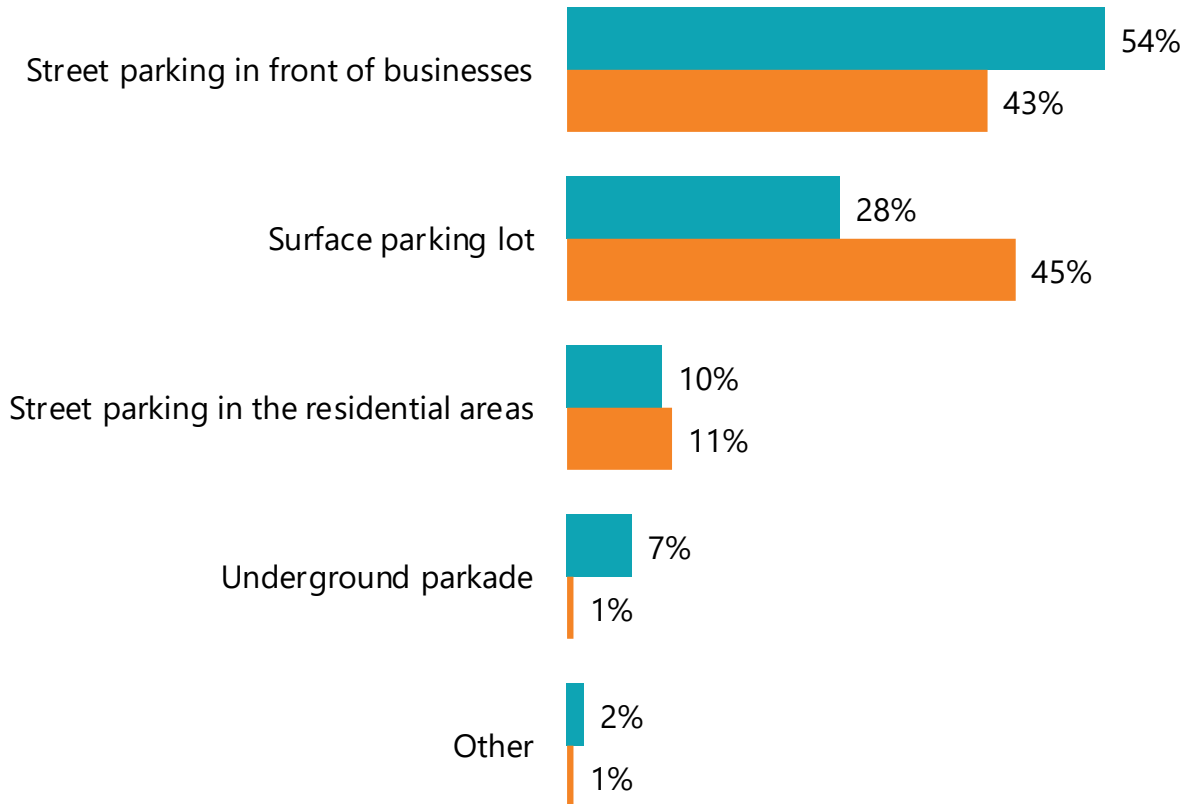
**Frequent visitors (once per week or more) are more likely to walk to Marda Loop**  
62% among online visitors  
66% among intercept visitors



# Where do visitors park?

Those who drive and park when they visit Marda Loop primarily choose street parking in front of businesses or surface parking lots. Very few park in residential areas or use parkades.

**Parking at Marda Loop**





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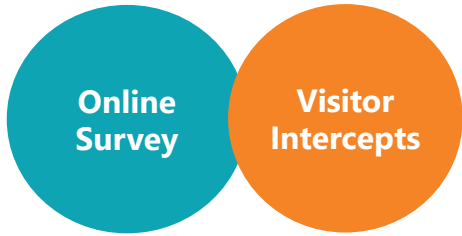
# SERVICES AND VISITOR SPENDING





# What are visitors spending their money on?

Visitors spend the most per visit on groceries. Average spending on food and drink, personal services and shopping/retail is about equal but half of grocery spending.



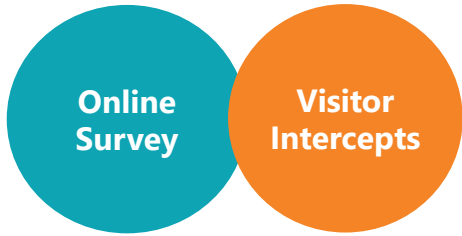
Average Spending on Typical Visit to Marda Loop

On average, intercept visitors visited 3.1 stores/services

**Groceries:** Spending is highest among visitors 45-54 years, frequent visitors, and those with higher HH incomes.  
**Food and drink:** Spending is higher among visitors who are employed full time and those with higher HH incomes.  
**Personal services:** Spending is higher among women.  
**Shopping/retail:** Spending increases with visitor's age.



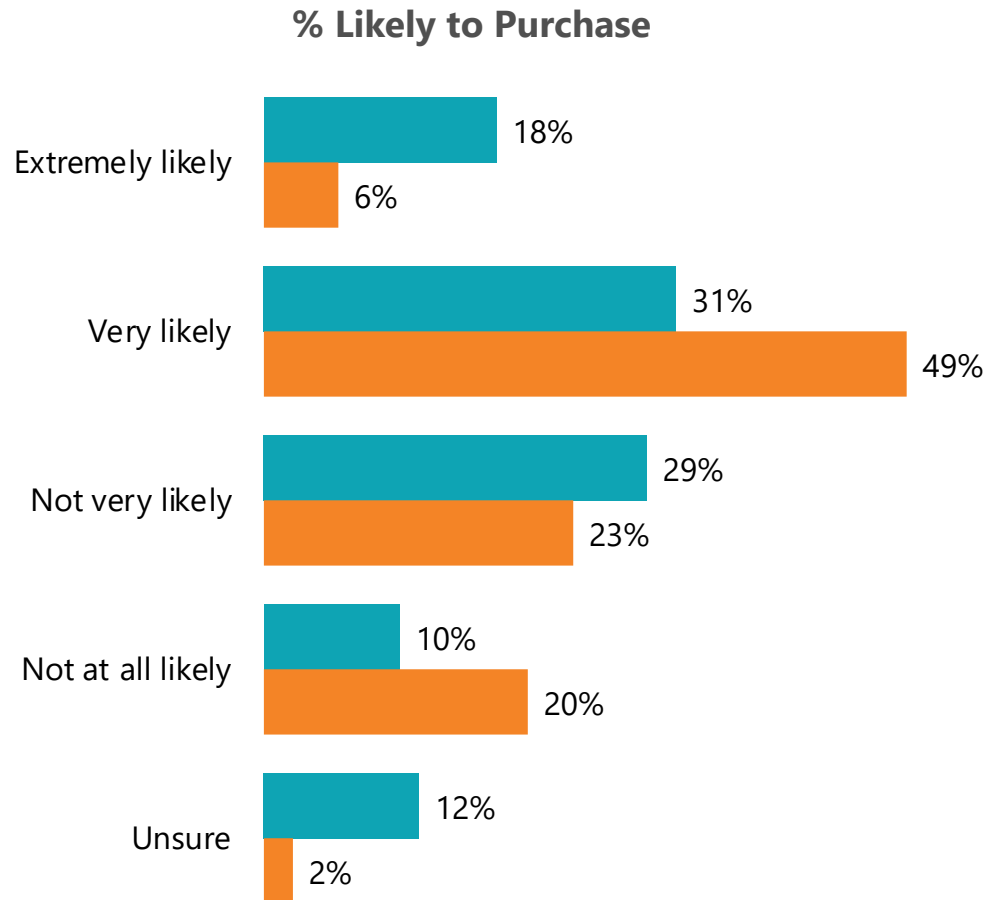




# Visitor Interest in Marda Loop Gift Card



There is considerable interest in the concept of a Marda Loop gift card that could be used throughout the area at stores and services. About half of visitors would be *extremely* or *very likely* to purchase this type of gift card.



**The concept of a Marda Loop gift card generates the most interest from younger visitors (18-34 years)**

**57% extremely/very likely to purchase among online visitors 18-34 years**

**67% extremely/very likely to purchase among intercept visitors 18-34 years**

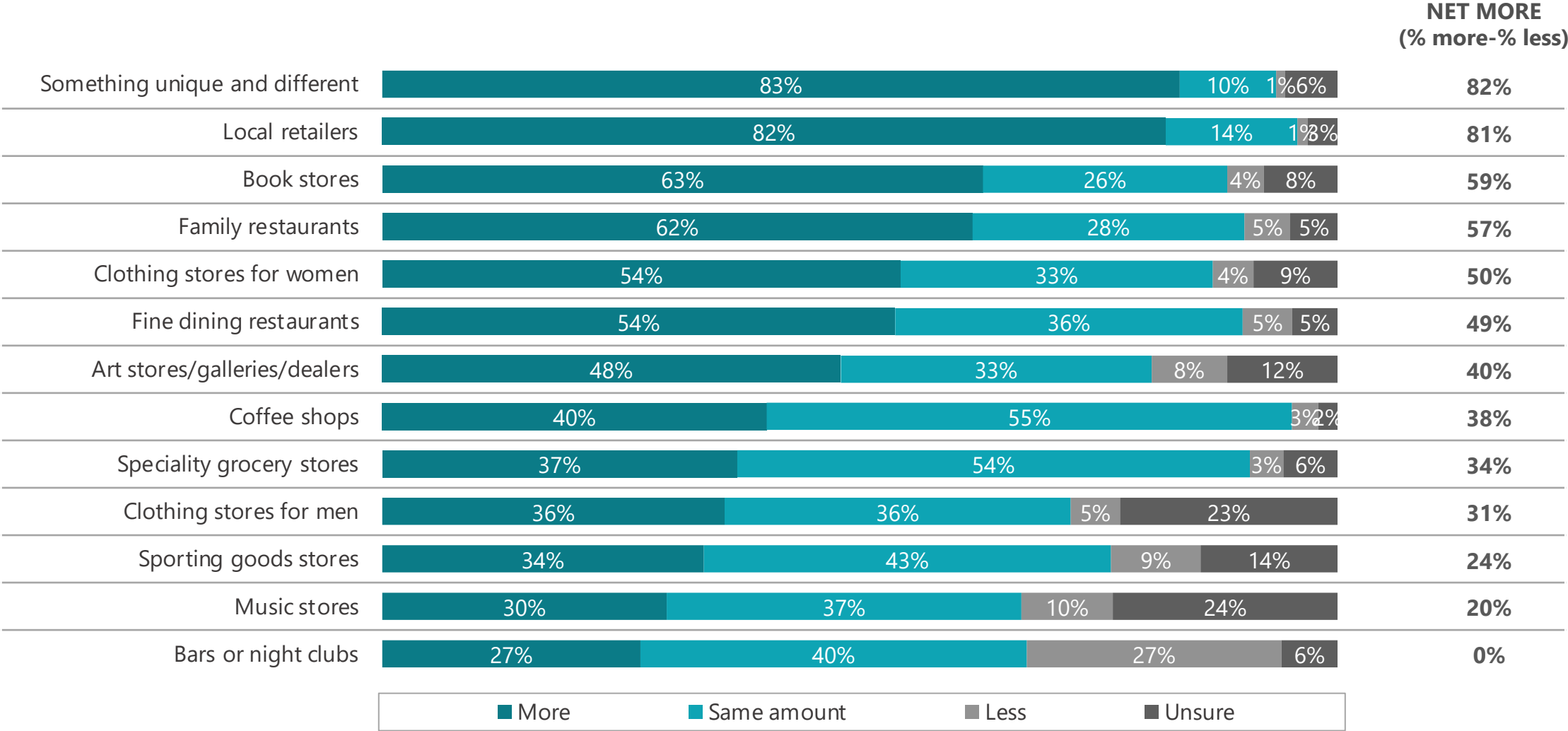
Base online survey: All respondents (n=544) Base intercept visitors: All respondents (n=320)  
 Q14. How likely would you be to purchase a Marda Loop gift card that could be used at all types of businesses throughout Marda Loop?  
 This would be similar to a gift card purchased at shopping malls that is valid at most stores and services in the mall.



# What types of businesses do visitors want to see more/less of?



There is a general sense that Marda Loop should have **more unique and local service offerings**. There is specific demand for book stores, family and fine dining restaurants, women’s clothing stores, and arts stores/galleries.



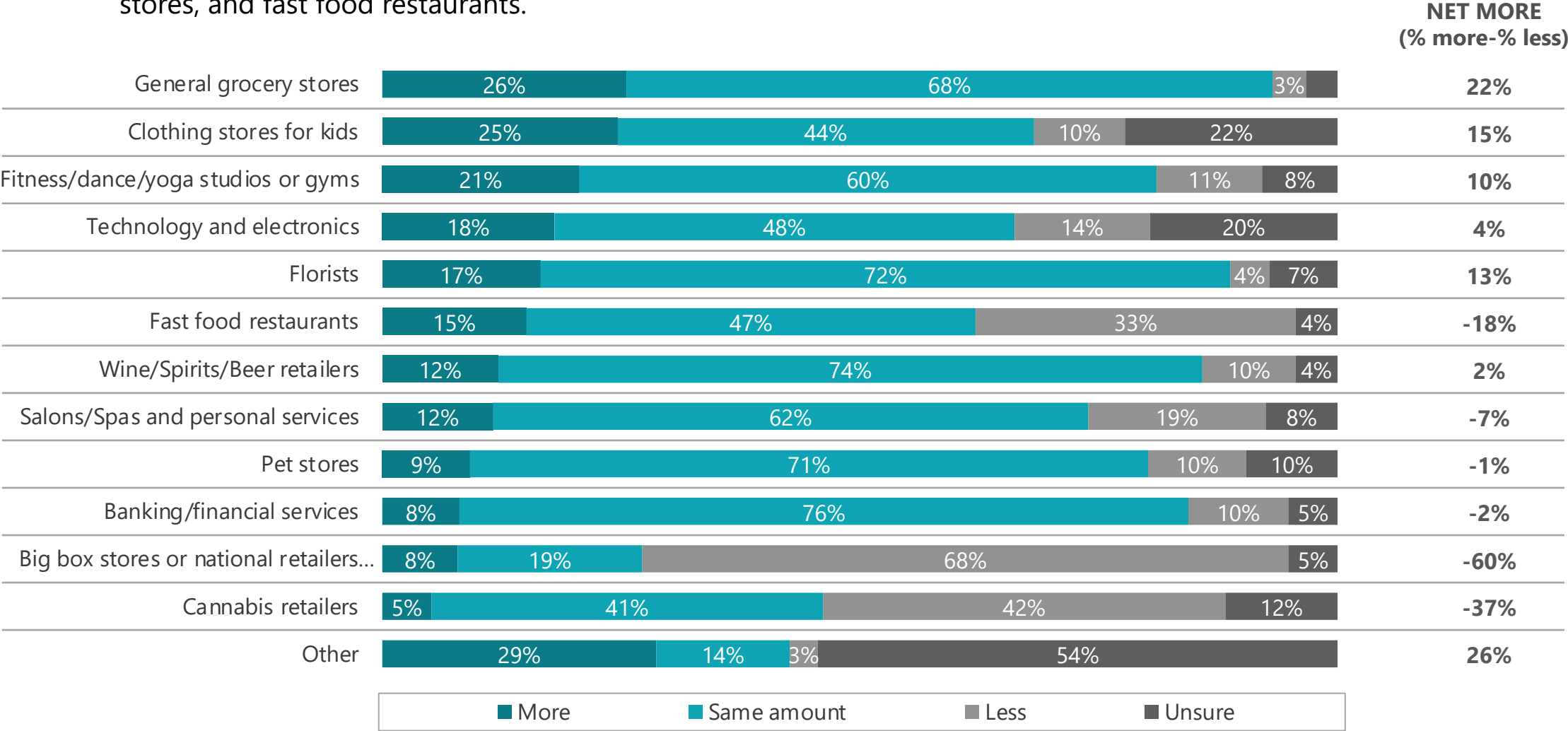
Base: All respondents (n=544)  
 Q10. Which of the following types of businesses would you like to see more or less of in Marda Loop?



# What types of businesses do visitors want to see more/less of?



Visitors are content with Marda Loop’s current offering of grocery stores, florists, liquor stores, fitness studios or gyms, salons/spas, pet stores and banking/financial institutions. Less desired businesses that visitors would like to see less of in the area include big box retailers, cannabis stores, and fast food restaurants.



Base: All respondents (n=544)  
 Q10. Which of the following types of businesses would you like to see more or less of in Marda Loop?



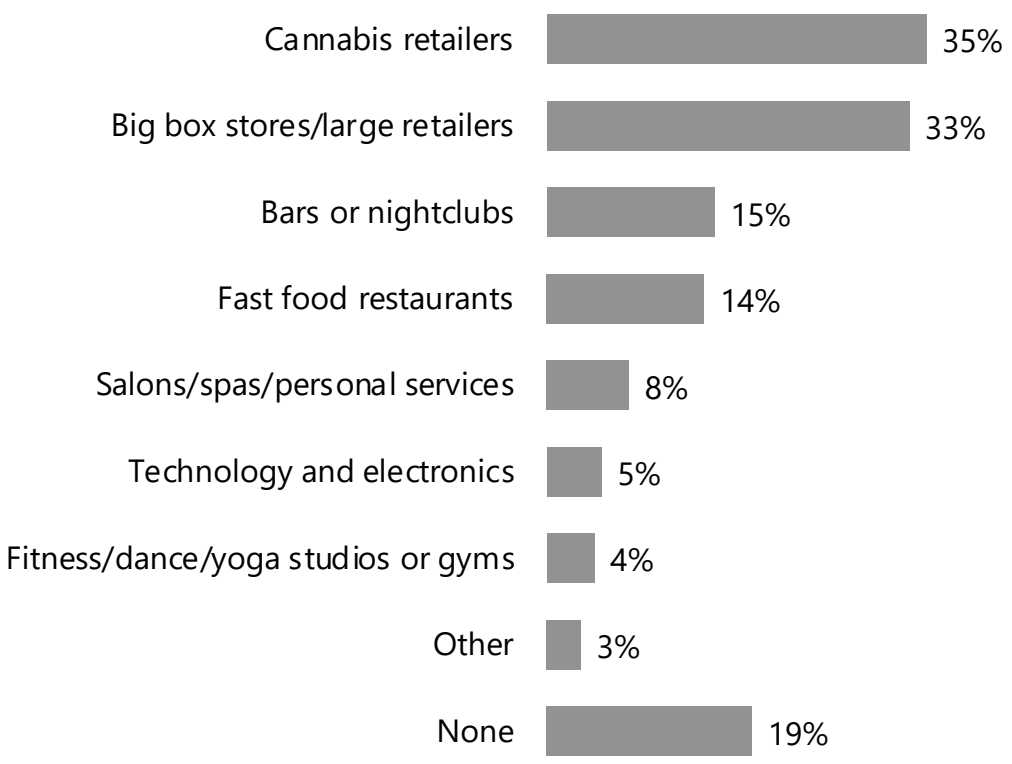
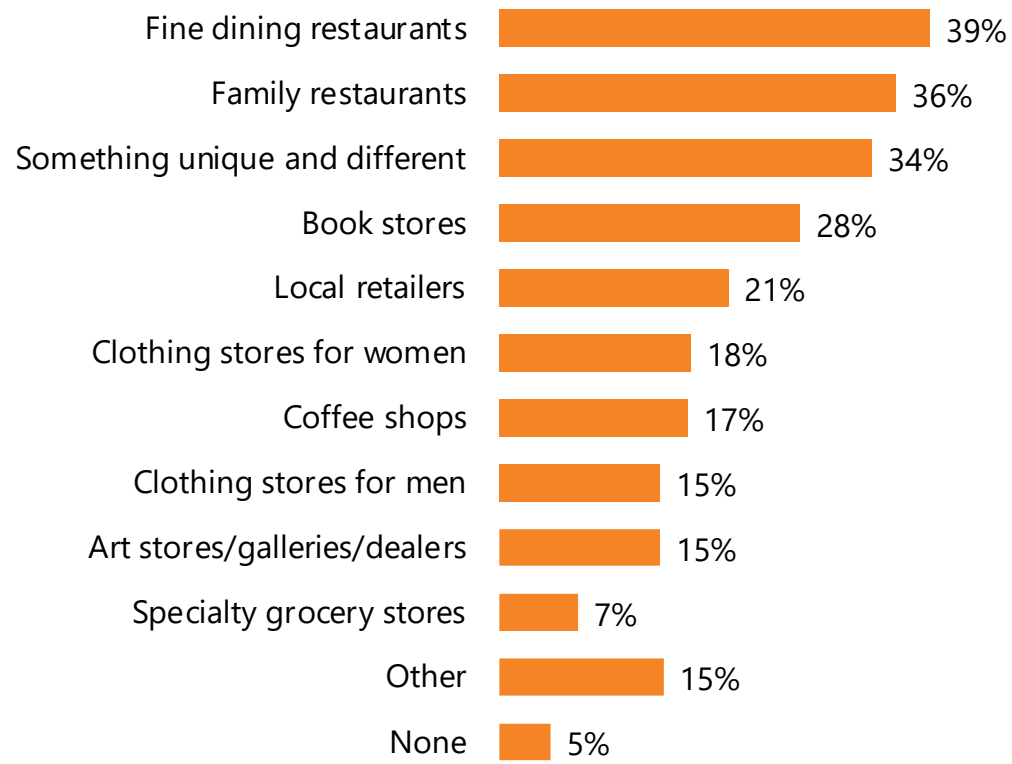
# What types of businesses do visitors want to see more/less of?



Intercept visitors further support the demand for more family and fine dining restaurants in Marda Loop (and less fast food establishments). They also want to see unique and local business offerings as well as book stores. To a lesser extent, there is also some demand for clothing stores (women’s and men’s), coffee shops, and art stores. Cannabis retailers and big box/large retailers top the list of undesired businesses.

### MORE businesses like these

### LESS businesses like these







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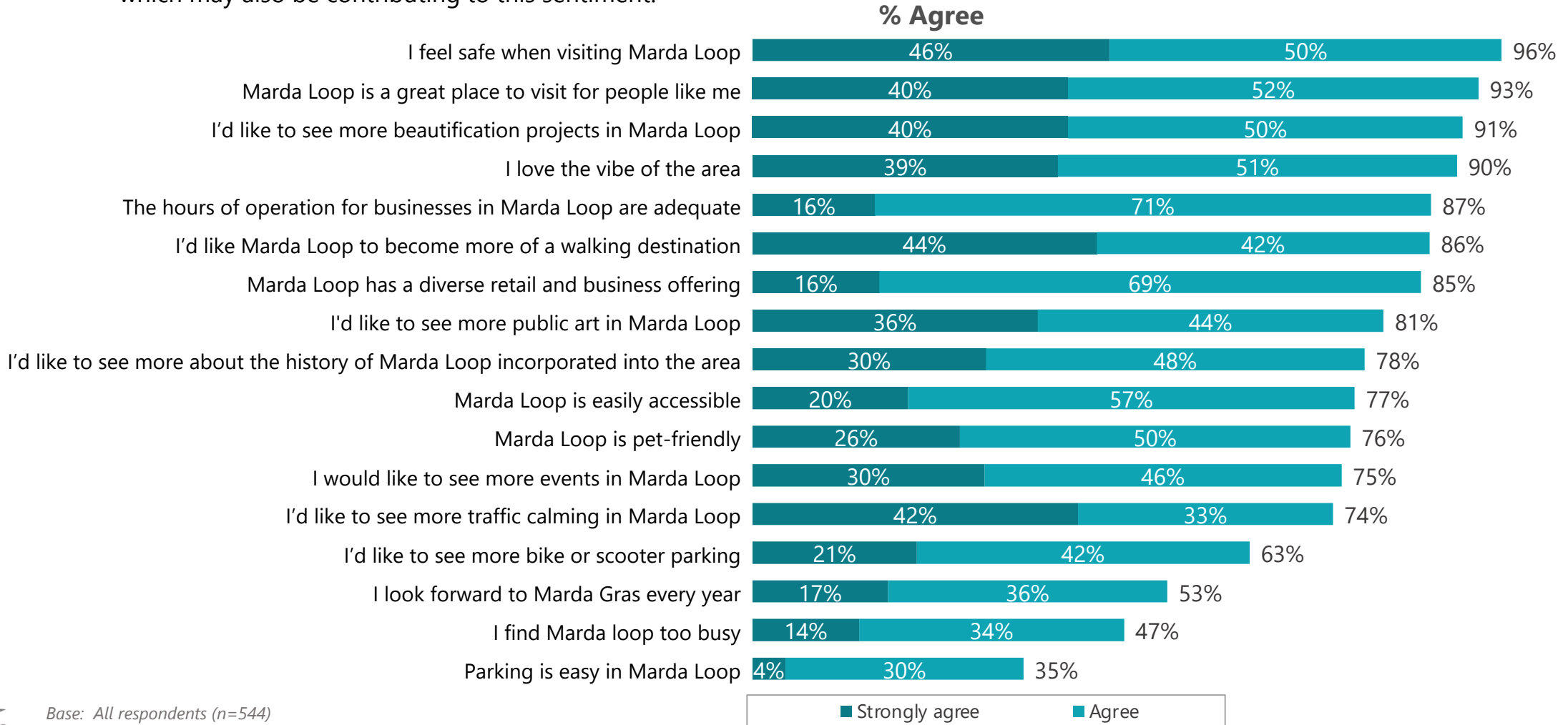
# IMPRESSIONS AND ATTITUDES





# Attitudes toward Marda Loop

Marda Loop visitors are largely positive about the area – they feel safe, consider it a great place to visit, and love the area’s vibe. Fewer visitors *strongly agree* that the business hours of operation are adequate or that Marda Loop has a diverse retail and business offering. Further, many visitors would like to see more beautification projects, public art, and historical content in Marda Loop. Since many visitors walk to Marda Loop, it is not surprising that there is a desire for the area to become more of a walking destination and more easily accessible. Parking and a sense that Marda Loop is ‘too busy’ are sore spots for visitors, which may also be contributing to this sentiment.



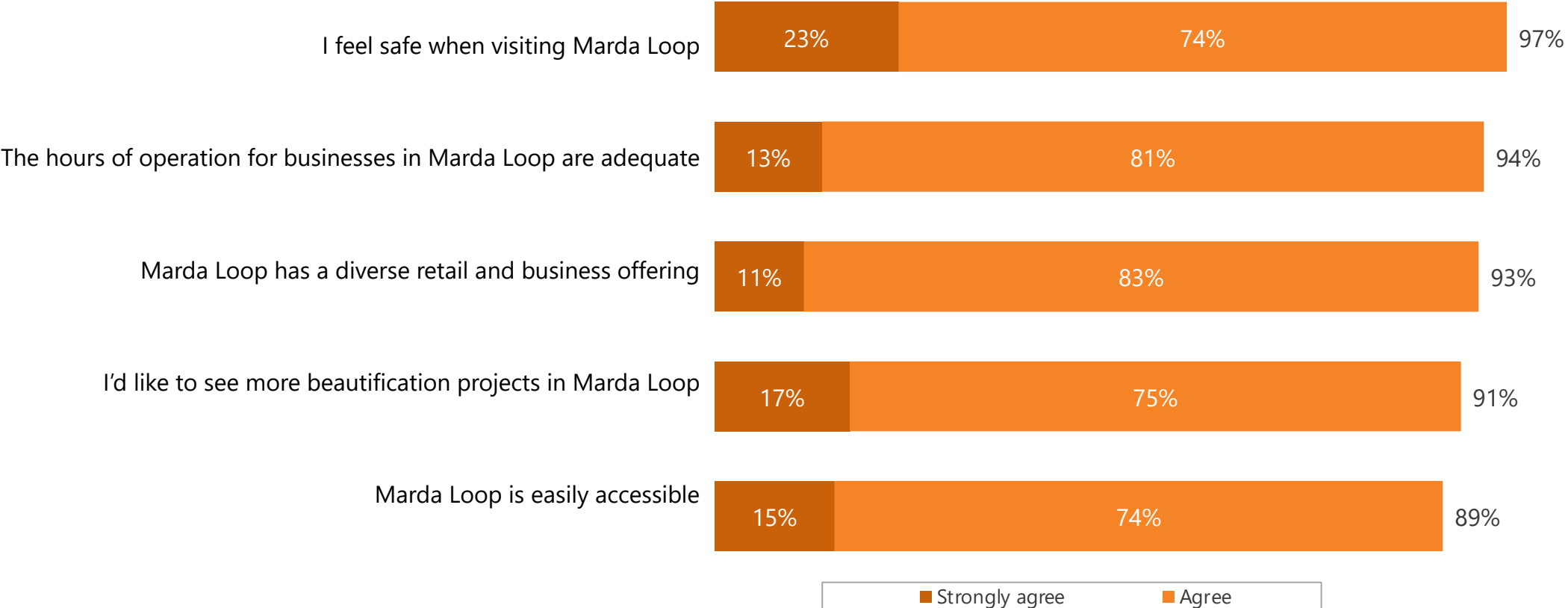


# Attitudes toward Marda Loop



Intercept visitors provided their agreement with a subset of the attitudinal statements about Marda Loop. While these visitors also have positive feelings about the safety of the area, their agreement levels are weaker about Marda Loop’s hours of operation, diversity of offering, and accessibility (fewer than two-in-ten *strongly agree*). They also have less intense feelings than their online survey counterparts about the need for beautification projects in Marda Loop.

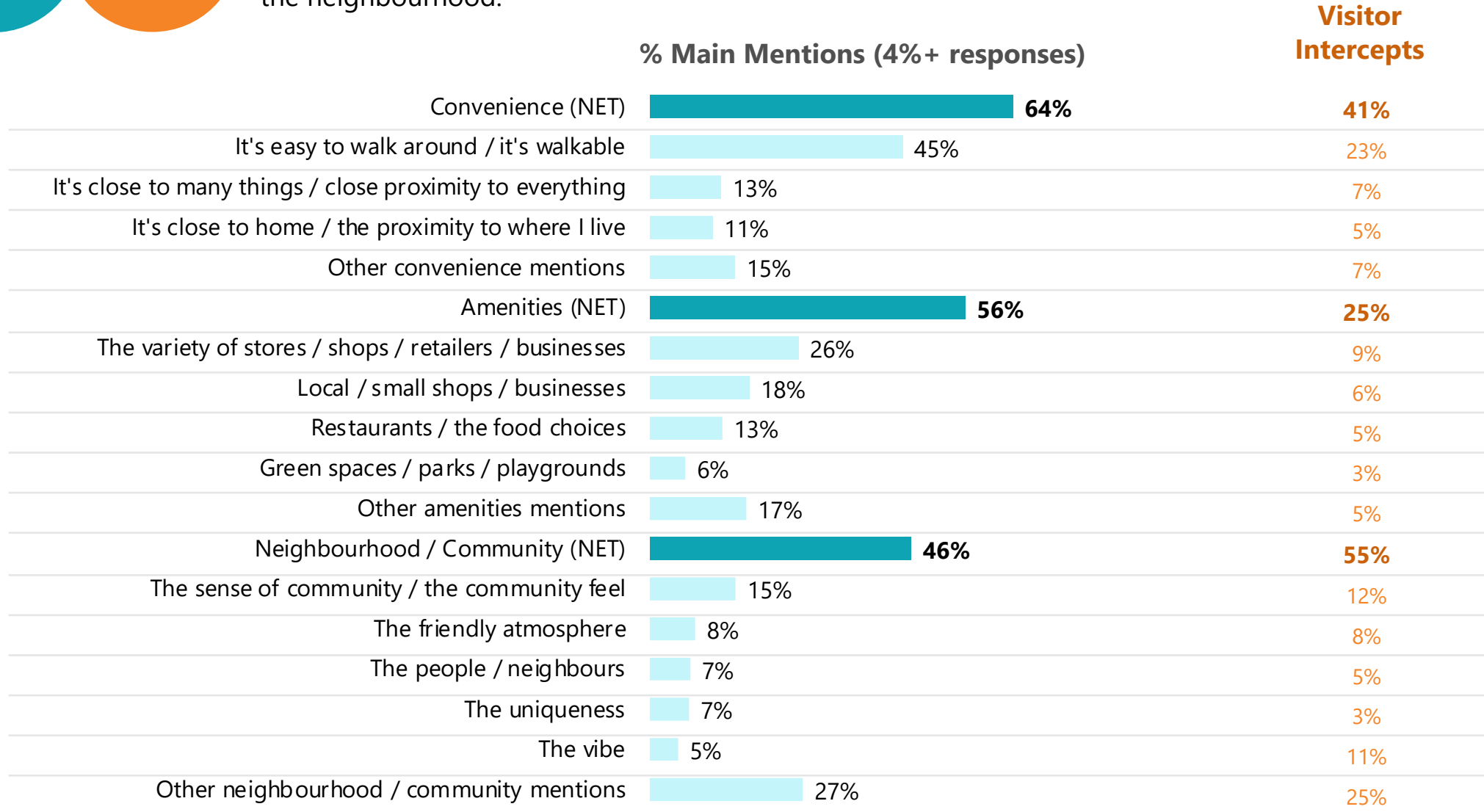
% Agree





# What do visitors appreciate most about Marda Loop?

The convenience, amenities and overall atmosphere of the neighbourhood are what visitors appreciate most about Marda Loop. Intercept visitors are more likely to mention positive aspects of the neighbourhood.







# What can Marda Loop improve?

Visitors would like to see improvements to the area's amenities (food and dining options, retail offerings, bike lanes, and green spaces). Traffic and congestion is also a notable area for improvement, followed by convenience issues such as parking and walkability of the area.



	% Main Mentions (4%+ responses)	Visitor Intercepts
Amenities (NET)	<b>44%</b>	<b>27%</b>
Restaurants / bars /dining / food choices / coffee shops	20%	11%
More / better local shops / small shops / independent businesses	11%	2%
Variety of stores / shops / retailers / businesses	8%	3%
Bike lanes need improvement	7%	2%
More green spaces / parks / playgrounds / trees / flowers	6%	6%
Other amenities mentions	14%	8%
Less traffic / less congestion / better traffic control / flow	<b>42%</b>	<b>43%</b>
Convenience (NET)	<b>33%</b>	<b>29%</b>
Easy / better / more parking / underground parking	22%	23%
Better pedestrian crossings / more protection for pedestrians	9%	2%
Easier to walk around / more walkable	6%	4%
Less construction / buildings / high rises / condos / densification	<b>14%</b>	<b>5%</b>
Neighbourhood / Community (NET)	<b>11%</b>	<b>7%</b>
Make it safer / a safe community / less break-ins	6%	1%
Other neighbourhood / community mentions	7%	6%
Wider streets / improve the streets / pavement on streets	<b>6%</b>	<b>3%</b>
Better looking buildings	<b>5%</b>	<b>2%</b>

Base: Respondents who answered question (n=462)  
Q12. What improvements would you want to see in Marda Loop?

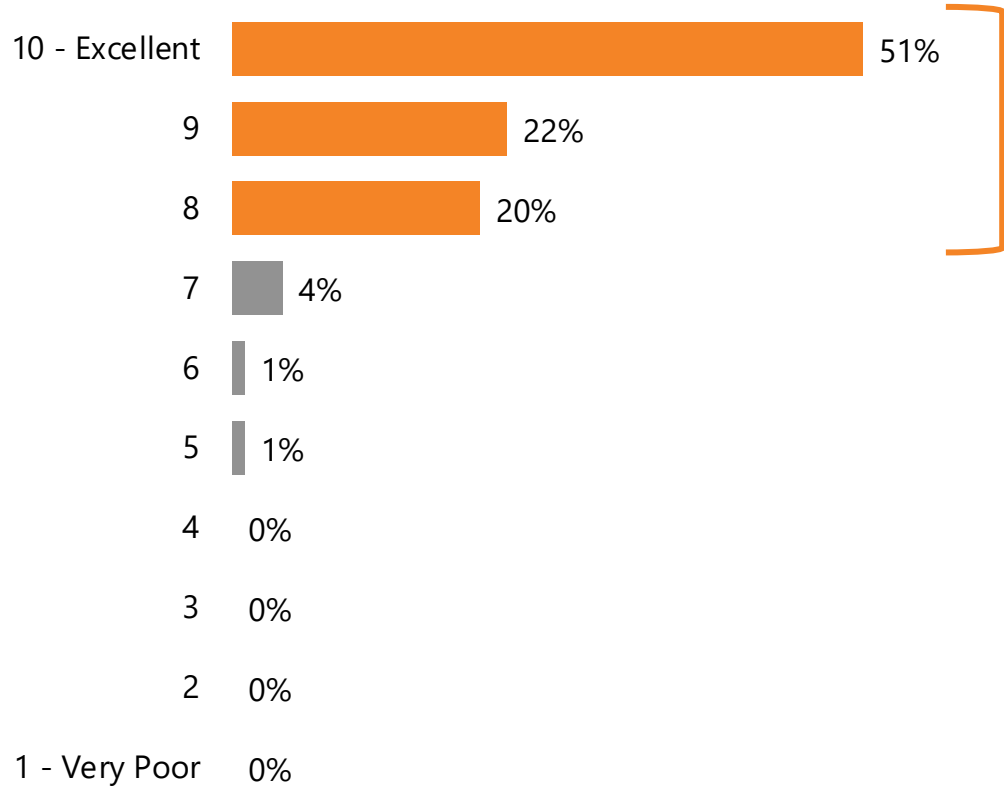
Base intercept visitors: All respondents (n=320)  
Q12. What improvements would you want to see in Marda Loop?



# Visitor Experience

The vast majority of visitors had extremely positive experiences when they visited Marda Loop this June. Worth noting however, is that construction and building improvements were set to begin in the days following the intercept research and many visitors expressed concern over how this might impact their experience.

## Rating with Today's Visit



**Ratings of Delight:**  
93% of visitors were delighted (ratings of 8, 9, 10) with their experience in Marda Loop.





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# MEDIA AND COMMUNICATION

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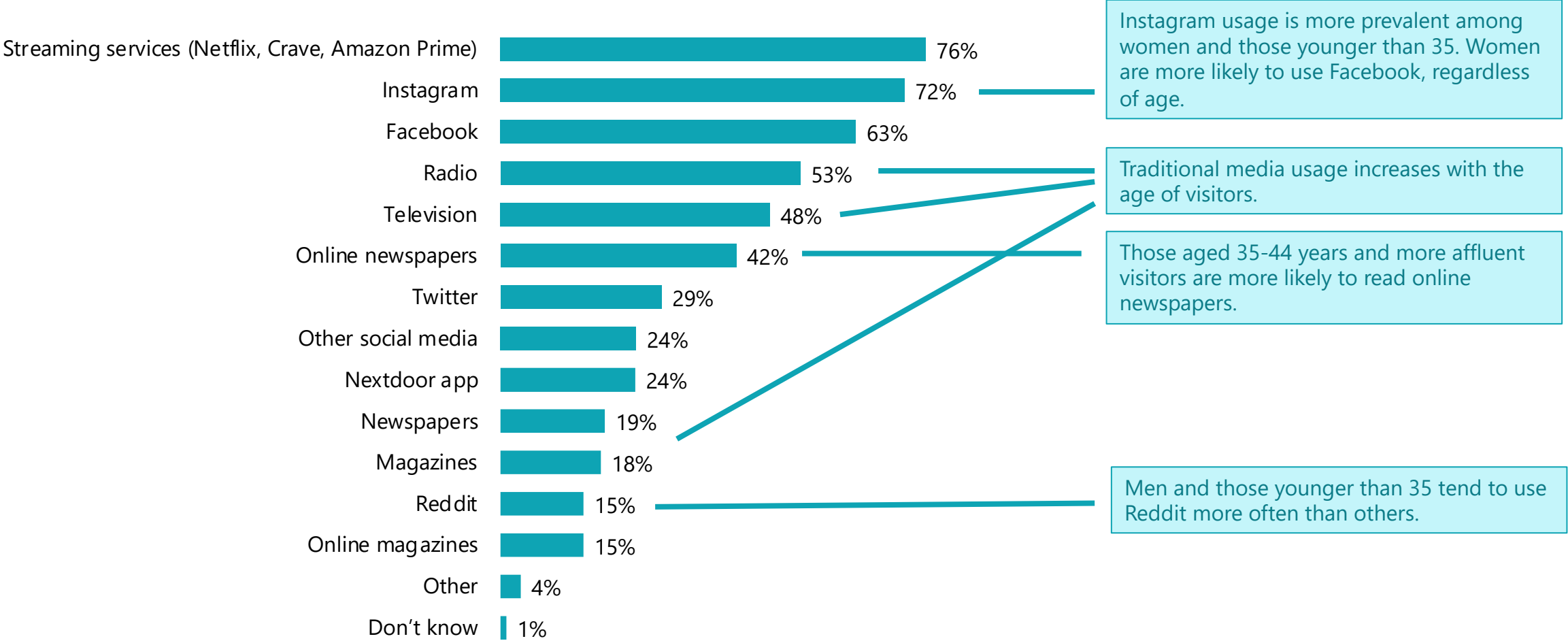




# Preferred Media Sources



Aside from streaming services, Marda Loop visitors are most connected on Instagram and Facebook platforms. Roughly half regularly use traditional media such as radio and TV. Currently, one-in-four visitors also use the Nextdoor app.







# What's the best way to reach visitors?

Social media and signage in Marda Loop will be the best way to communicate with visitors, followed by community and other newsletters.

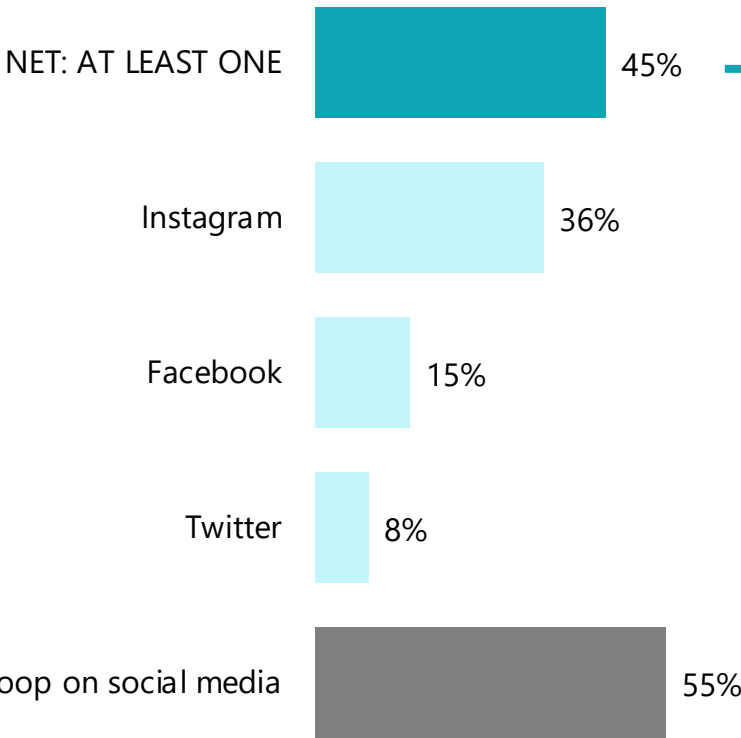


	<b>% Mentions (multiple responses permitted)</b>	<b>Visitor Intercepts</b>
NET: SOCIAL MEDIA	74%	55%
Instagram	53%	31%
Facebook	33%	24%
Twitter	10%	13%
Other social media	4%	11%
Signage in the community	40%	21%
Community newsletters	28%	19%
Posters at Marda Loop Retailers/ Service Providers	26%	11%
Direct mail materials delivered to your home	20%	2%
Nextdoor app	14%	9%
Local Magazines (Avenue, Impact)	15%	5%
Marda Loop BIA Website	9%	5%
Retailer email lists	7%	1%
Newsletters	5%	19%
Reddit	2%	0%
Other	6%	6%



# @visitmardalooop

Just less than half of visitors follow @visitmardalooop on at least one social media platform.



Visitors more likely to follow @visitmardalooop include women and those younger than 35.



**Questions for us?**

[gillian@stone-olafson.com](mailto:gillian@stone-olafson.com) or 403.703.4894

[tim@stone-olafson.com](mailto:tim@stone-olafson.com) or 403.605.0904

**Understanding people. It's what we do.**