



Ipsos Reid



THE CITY OF
CALGARY

City of Calgary Land Use Planning & Policy

Urban Design Research



July 2012

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- Calgary's City Council has provided direction for Administration to achieve "urban design excellence" and to improve the quality of Calgary's public realm. The result has been an increased interest in actively incorporating urban design considerations into projects, policies, and guidelines and is supported by the MDP (Municipal Development Plan – 2009).
- As part of its planning and strategy development, LUPP (Land Use Planning & Policy) is working to develop a set of urban design guidelines for large commercial sites.
- These guidelines will provide a consistent approach to larger commercial development, in essence ensuring that they address the key principles of making good public places, including creating a pleasant public realm, pedestrian and bicycle movement, reduced car dependency, adaptability to future use; and environmental stewardship.
- The document being prepared, Large Commercial Urban Design Guidelines, will strive to provide key stakeholders with the information required to achieve the detailed outcomes and support a shorter application review time while increasing consistency across applications in line with the MDP.

Study Objectives

The research included in this report strives to achieve the following three overarching objectives:

- To better understand the overall views and habits related to shopping in Calgary;
- To gauge citizen views and opinions related to the LCUD design criteria;
- To gain an understanding of shopping behaviours and preferences of ordinary Calgarians.

- Respondents were selected using Ipsos' Online Panel of Respondents – the sample was drawn to be representative of the city's population based on age and gender.
- A total of 306 online interviews were completed among residents 18 years of age and older.
- The overall survey results have been weighted by age and gender to reflect the population of the city of Calgary, using 2011 census data.
- The survey consisted of 27 questions, including gauging citizens' shopping area preferences, commercial parking preferences and views on urban commercial design.
- The survey was fielded from June 18 to June 25 2012.

Detailed Findings

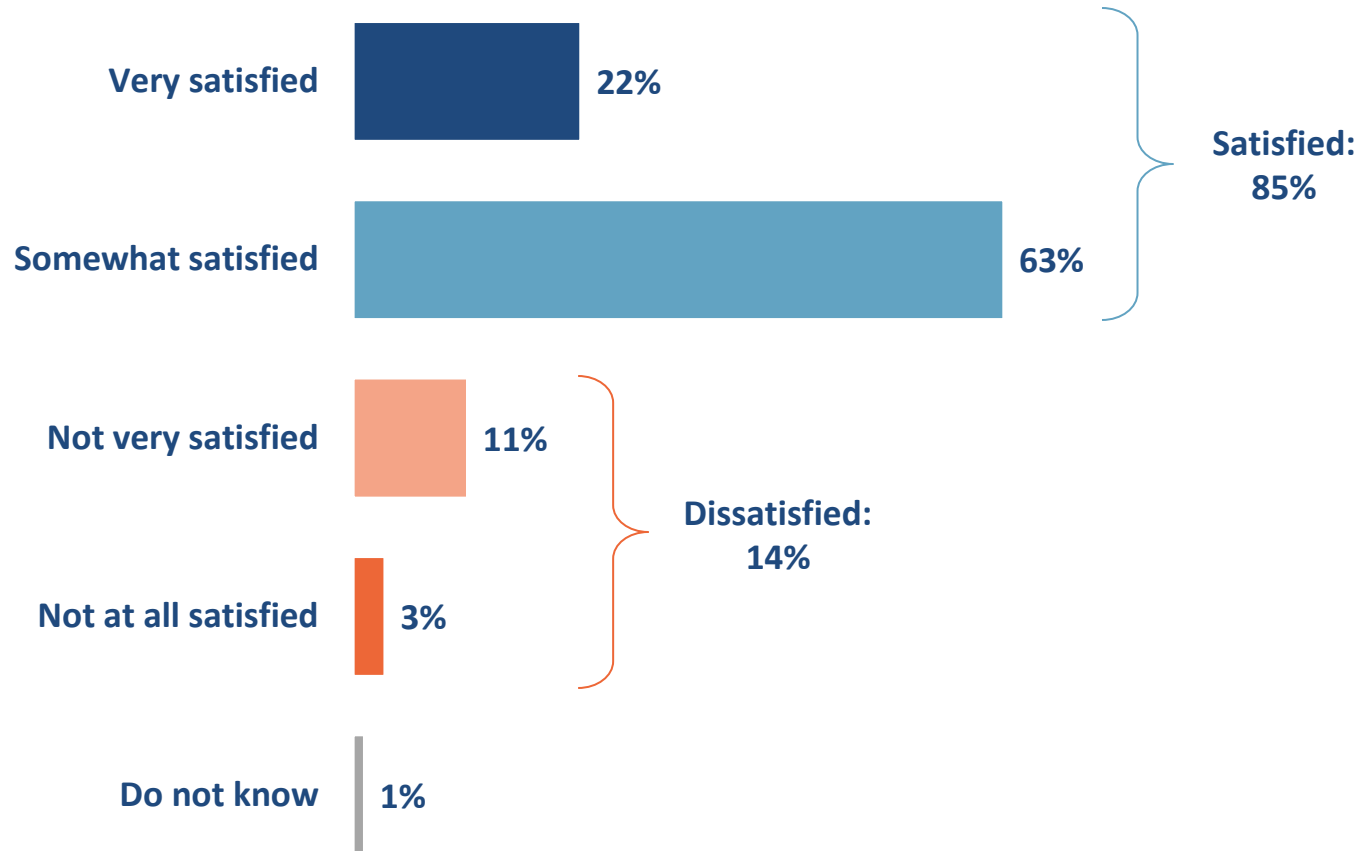


Views on Community



Overall Satisfaction with Experience at Large Commercial Sites in Calgary

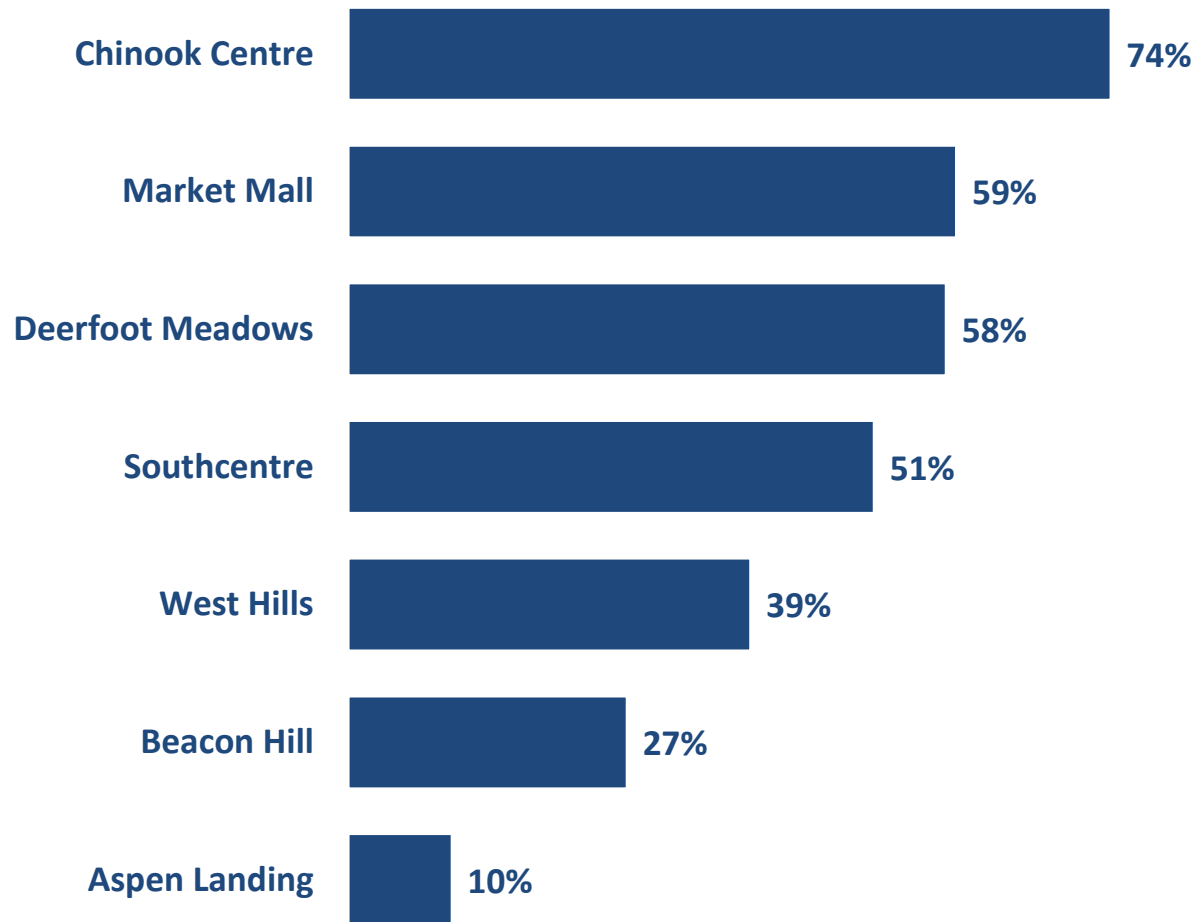
Approximately eight-in-ten Calgarians (85%) are satisfied with the overall shopping experience at large commercial sites in Calgary.



Q1. Overall, how satisfied are you with the experience at large commercial sites in Calgary. By experience, we mean the overall layout, design aesthetics, parking and walking components, and features of the area that make it welcoming for shoppers. These sites include areas like Chinook, Market Mall, Southcentre, Deerfoot Meadows, MacKenzie Town, Aspen, Beacon Hill, West Hills, and others that are designed for Calgarians to attend for shopping, entertainment, and dining.

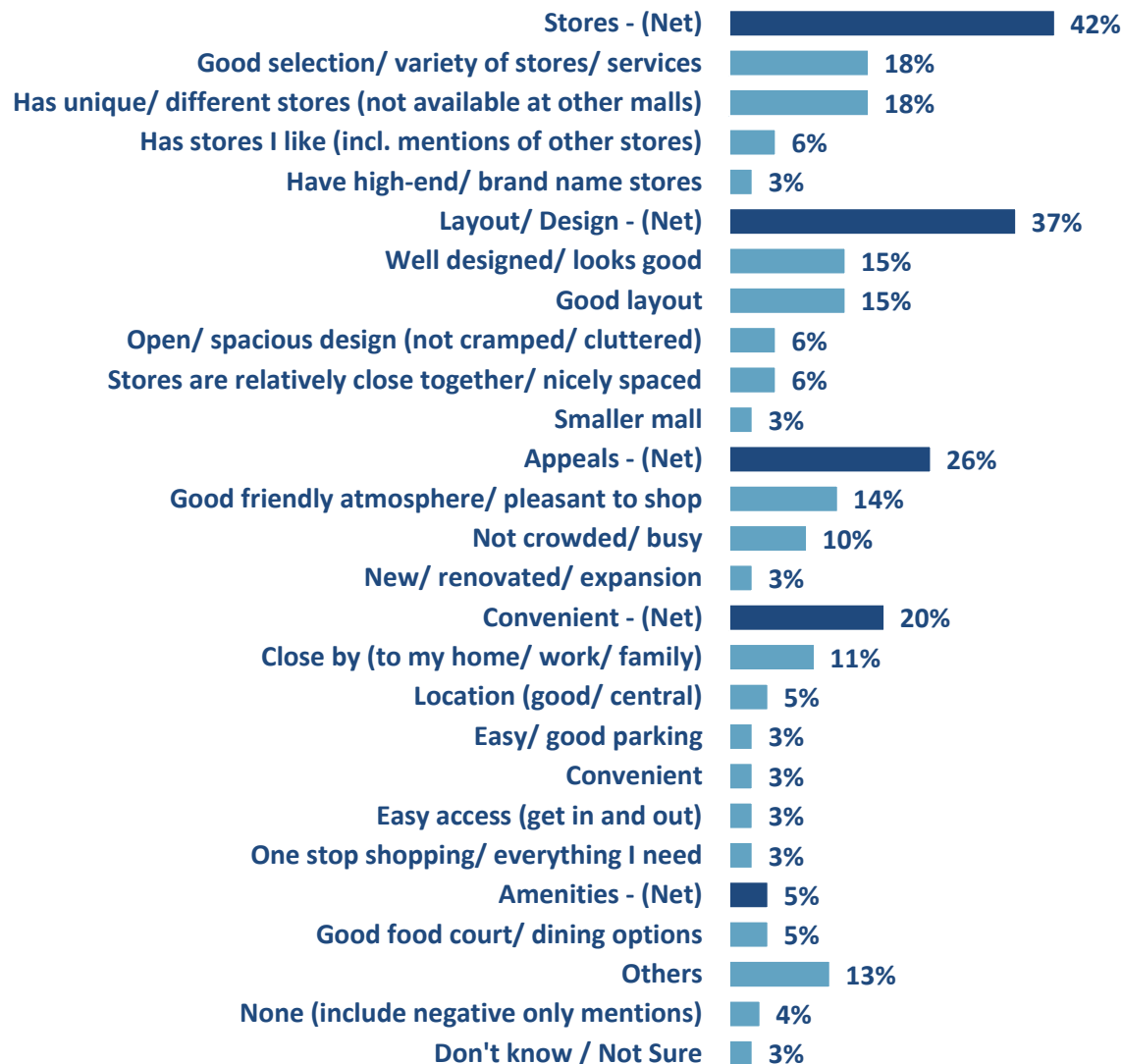
Base: All respondents (n=306)

Commercial Sites Visited in the Last Six Months



Perceptions of Large Commercial Sites in Calgary – Things People Like Best

Aspen Landing

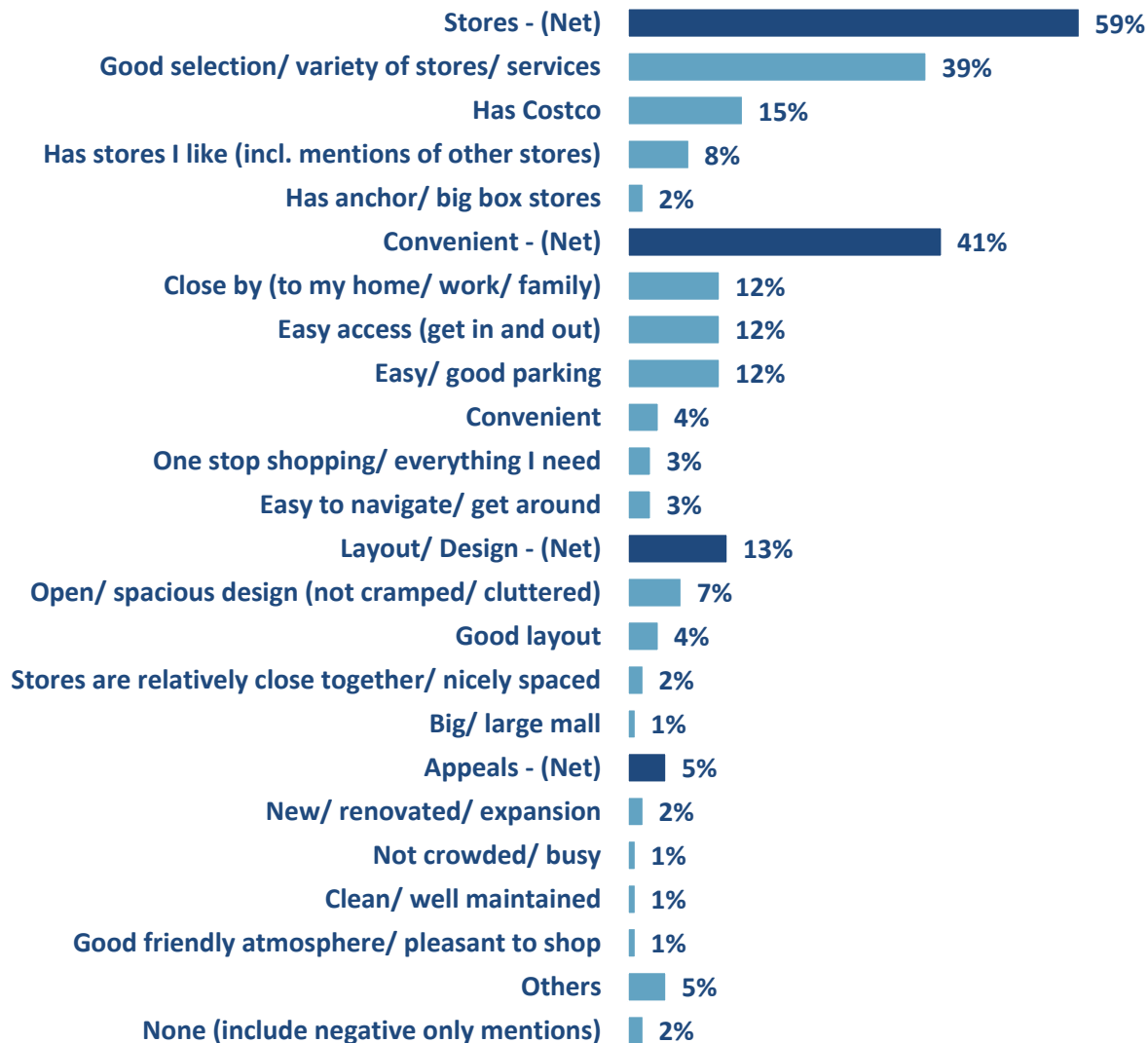


Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Aspen Landing personally visited (n=31)

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

Beacon Hill

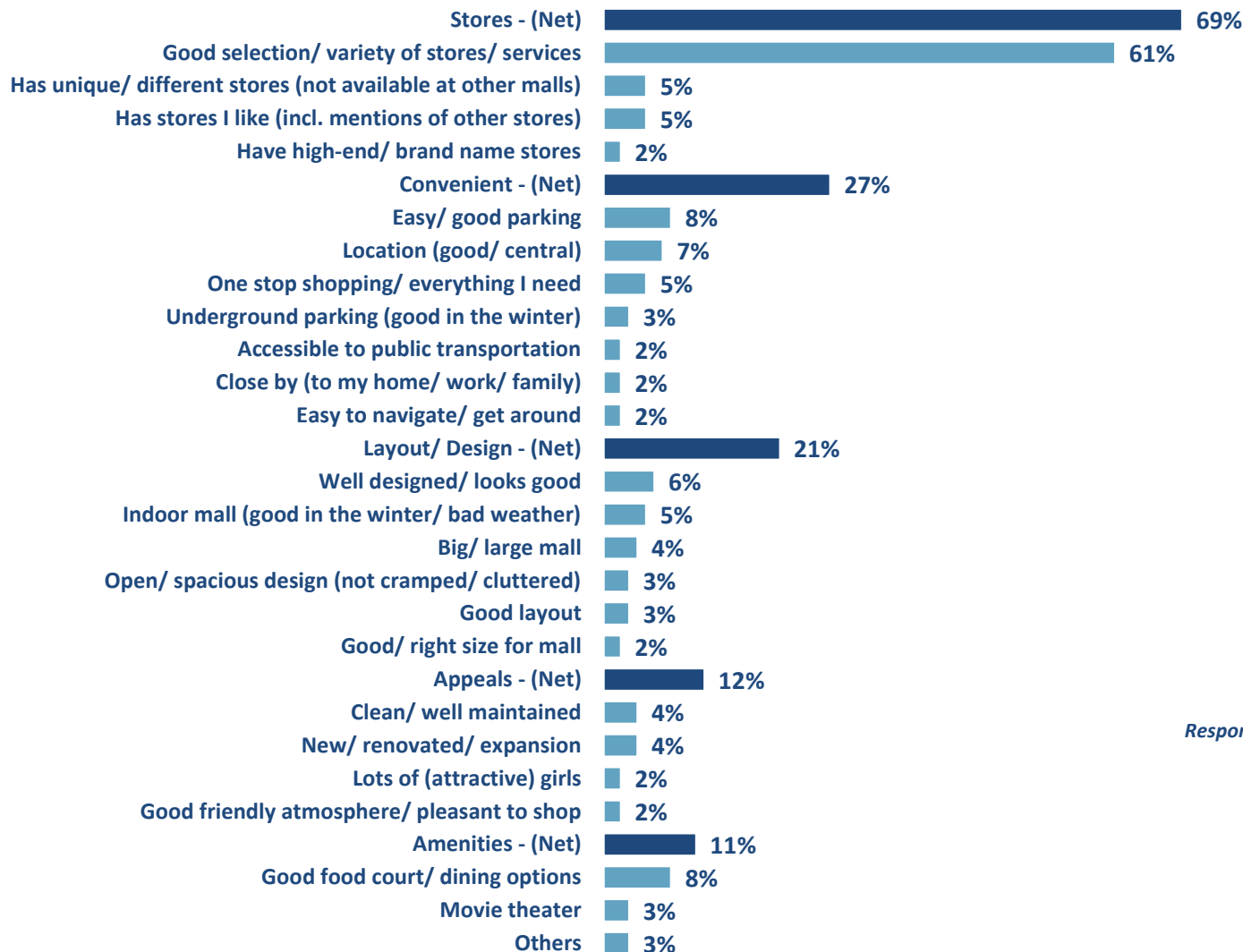


Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Beacon Hill personally visited (n=81)

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

Chinook Centre



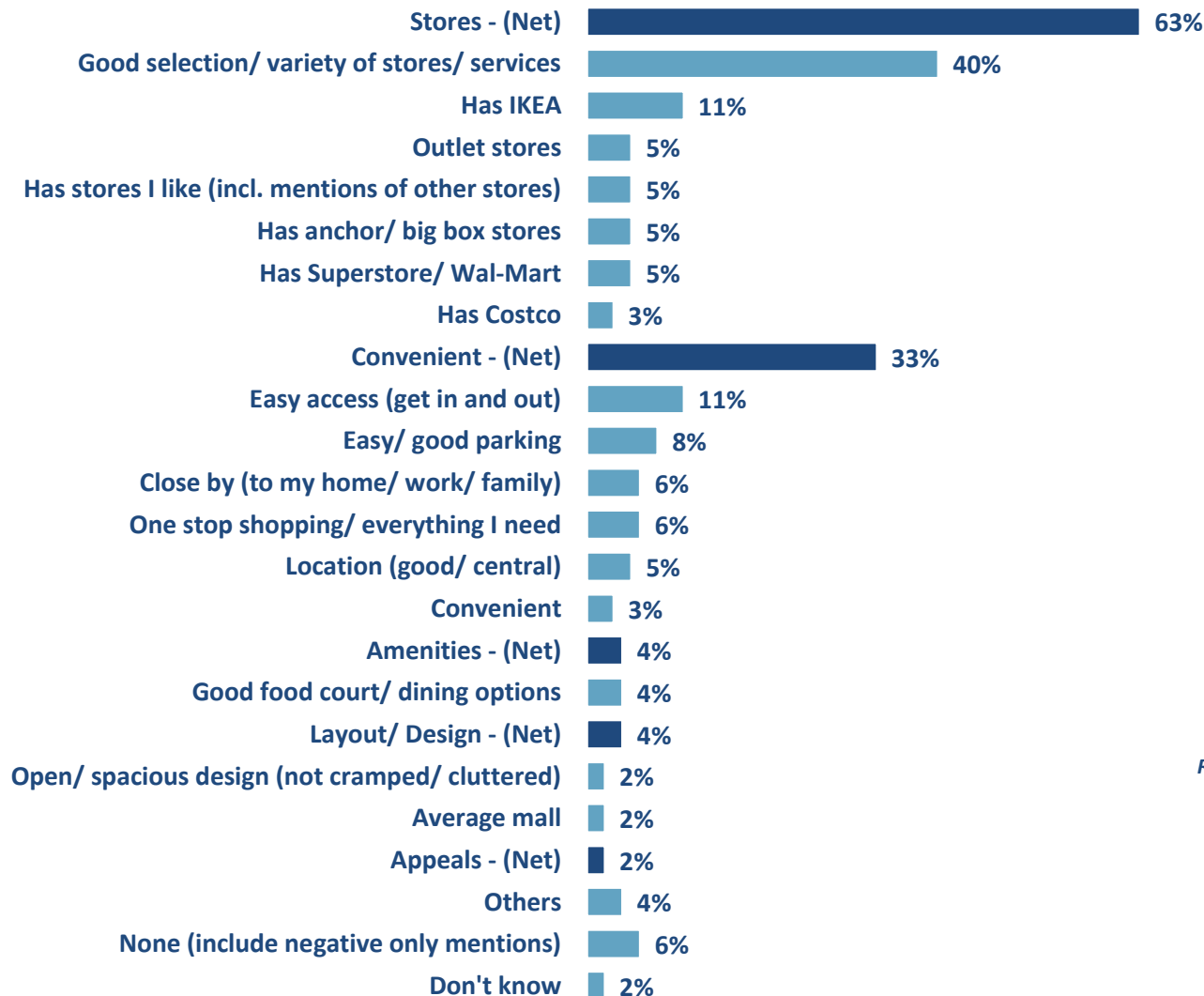
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Chinook Centre personally visited (n=223)

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

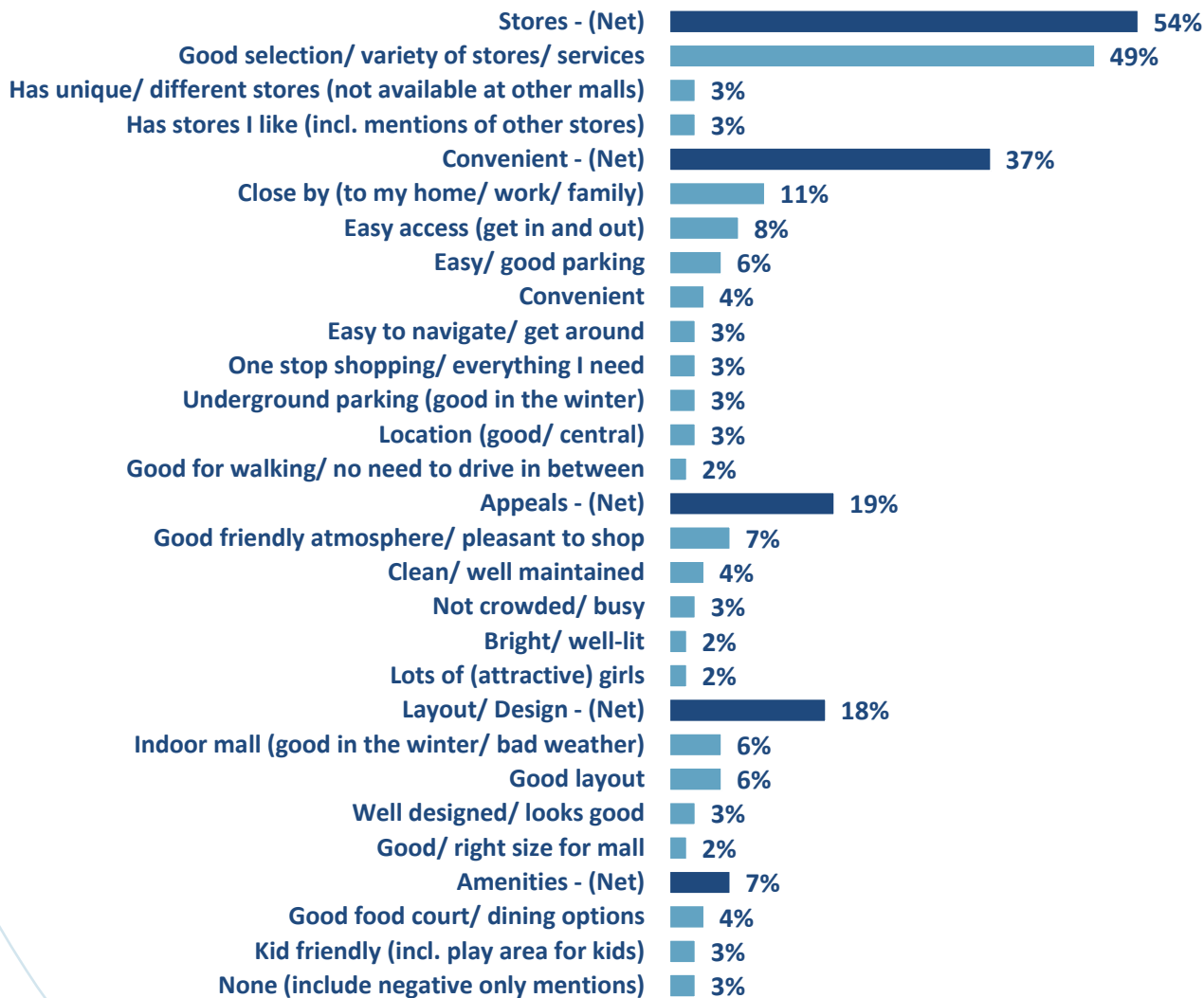
Deerfoot Meadows



Responses of 1% and under not shown here

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

Market Mall



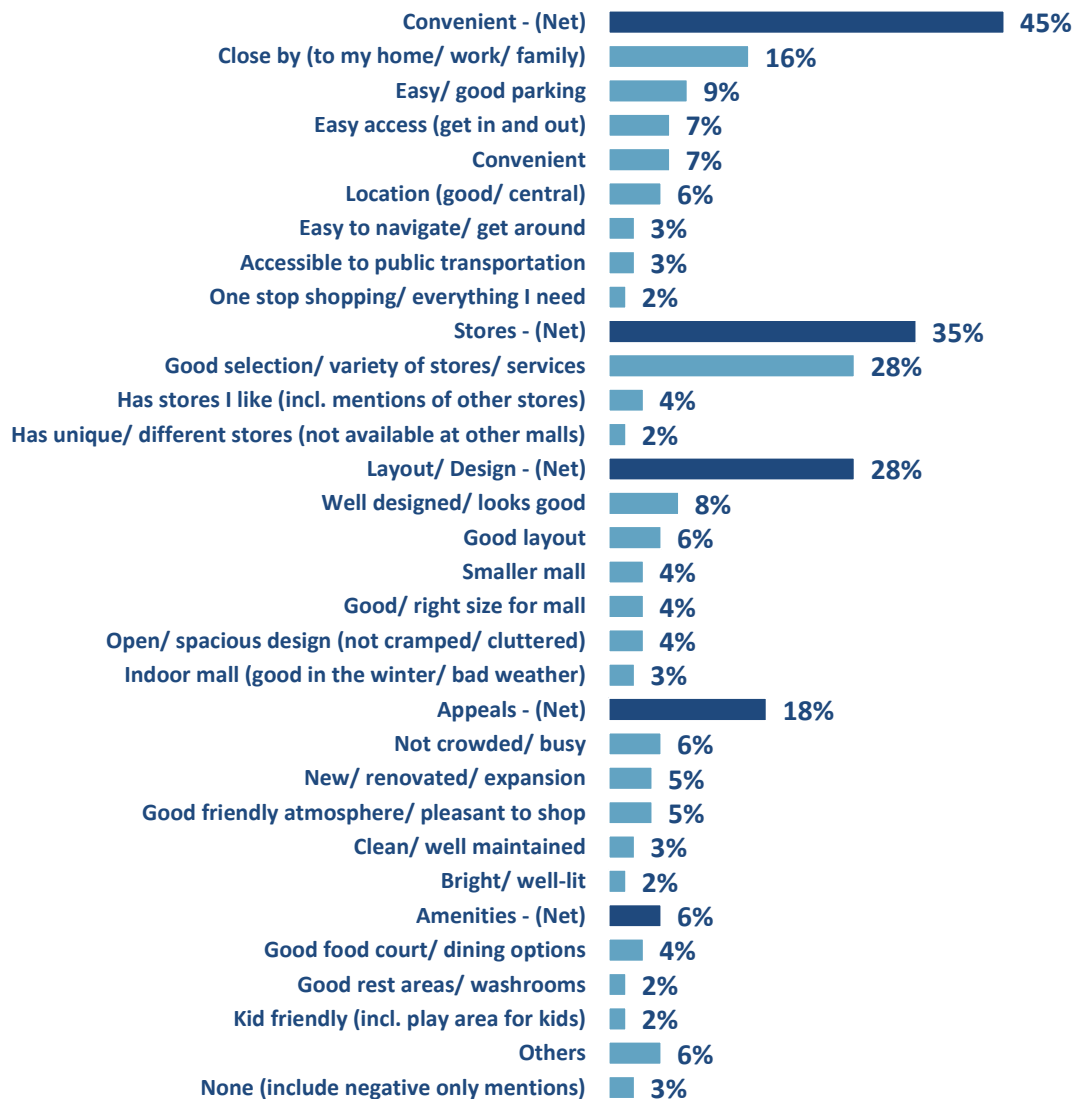
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Market Mall personally visited (n=177)

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

Southcentre



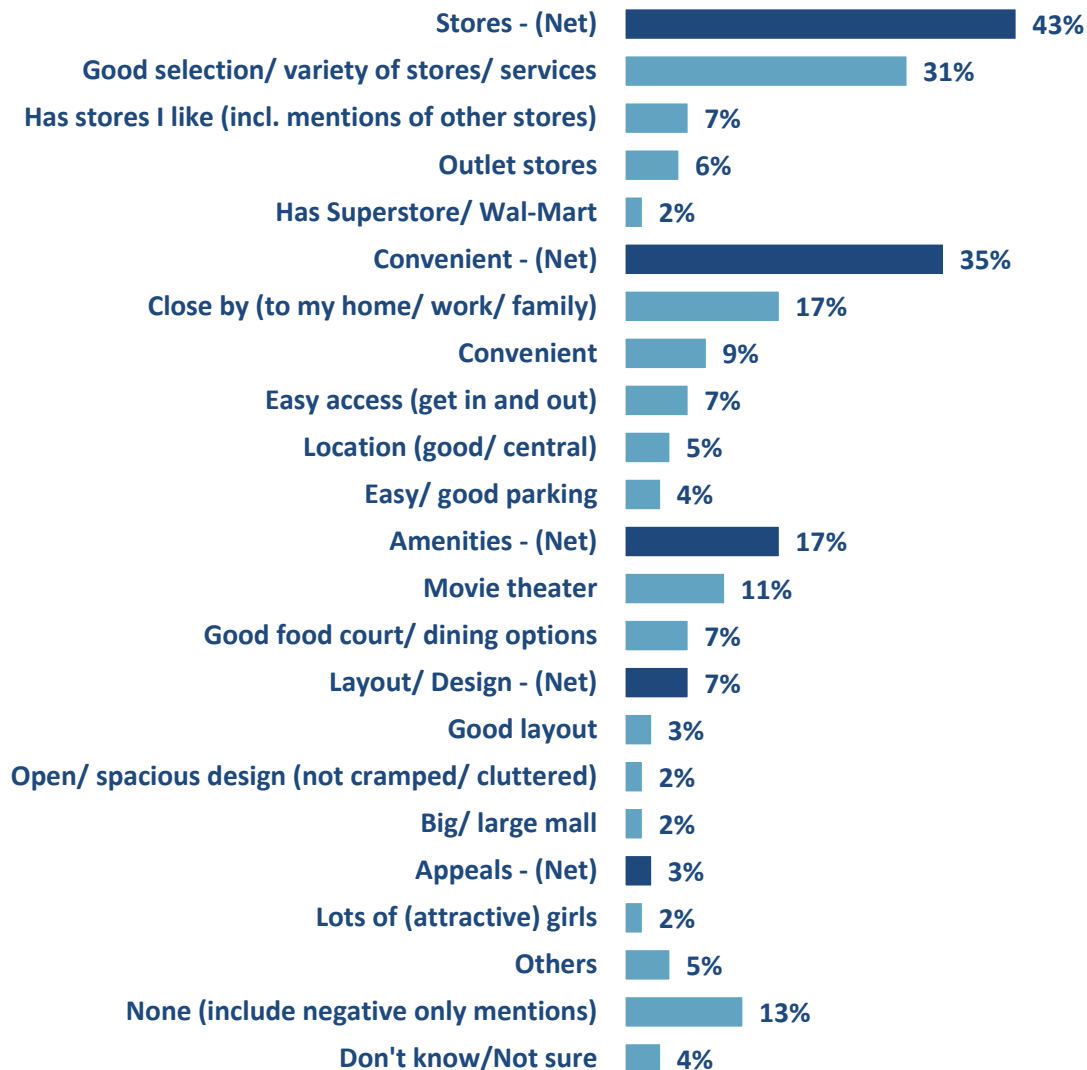
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Southcentre personally visited (n=154)

Perceptions of Large Commercial Sites in Calgary – Things People Like Best

West Hills



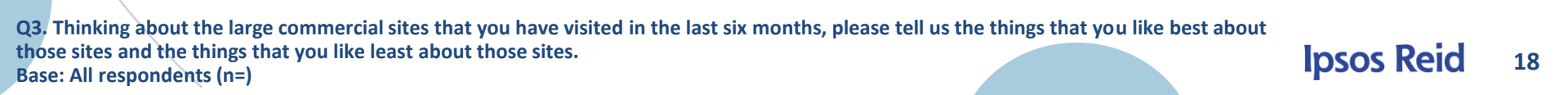
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: West Hills personally visited (n=120)

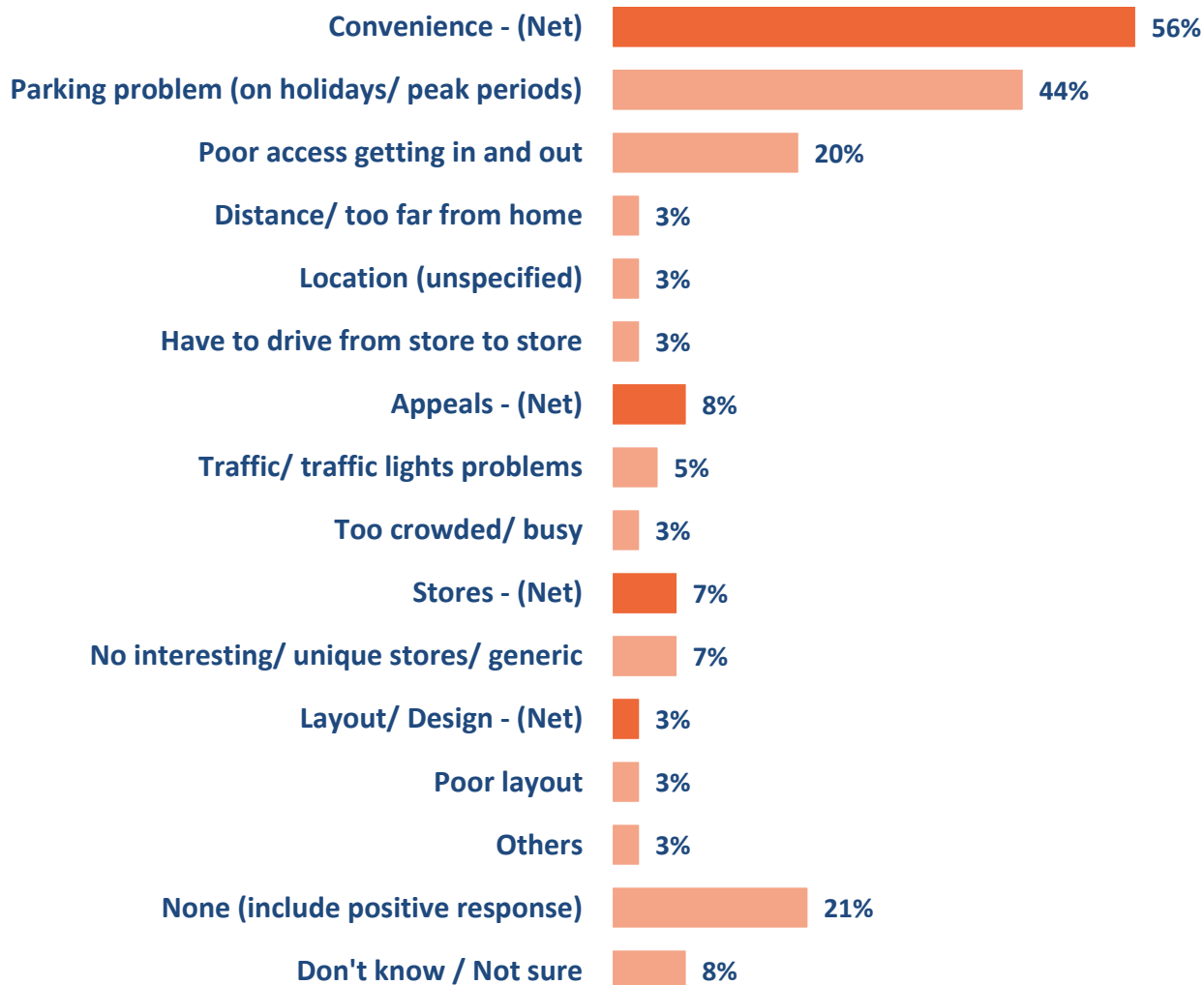
Perceptions of Large Commercial Sites in Calgary – Things People Like Best

	Aspen Landing	Beacon Hill	Chinook Centre	Deerfoot Meadows	Market Mall	South-centre	West Hills
	n=31	n=81	n=223	n=174	n=177	n=154	n=120
Stores - (Net)	42%	59%	69%	63%	54%	35%	43%
Convenient - (Net)	20%	41%	27%	33%	37%	45%	35%
Amenities - (Net)	5%	-	11%	4%	7%	6%	17%
Layout/ Design - (Net)	37%	13%	21%	4%	18%	28%	7%
Appeals - (Net)	26%	5%	12%	2%	19%	18%	3%



Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Aspen Landing

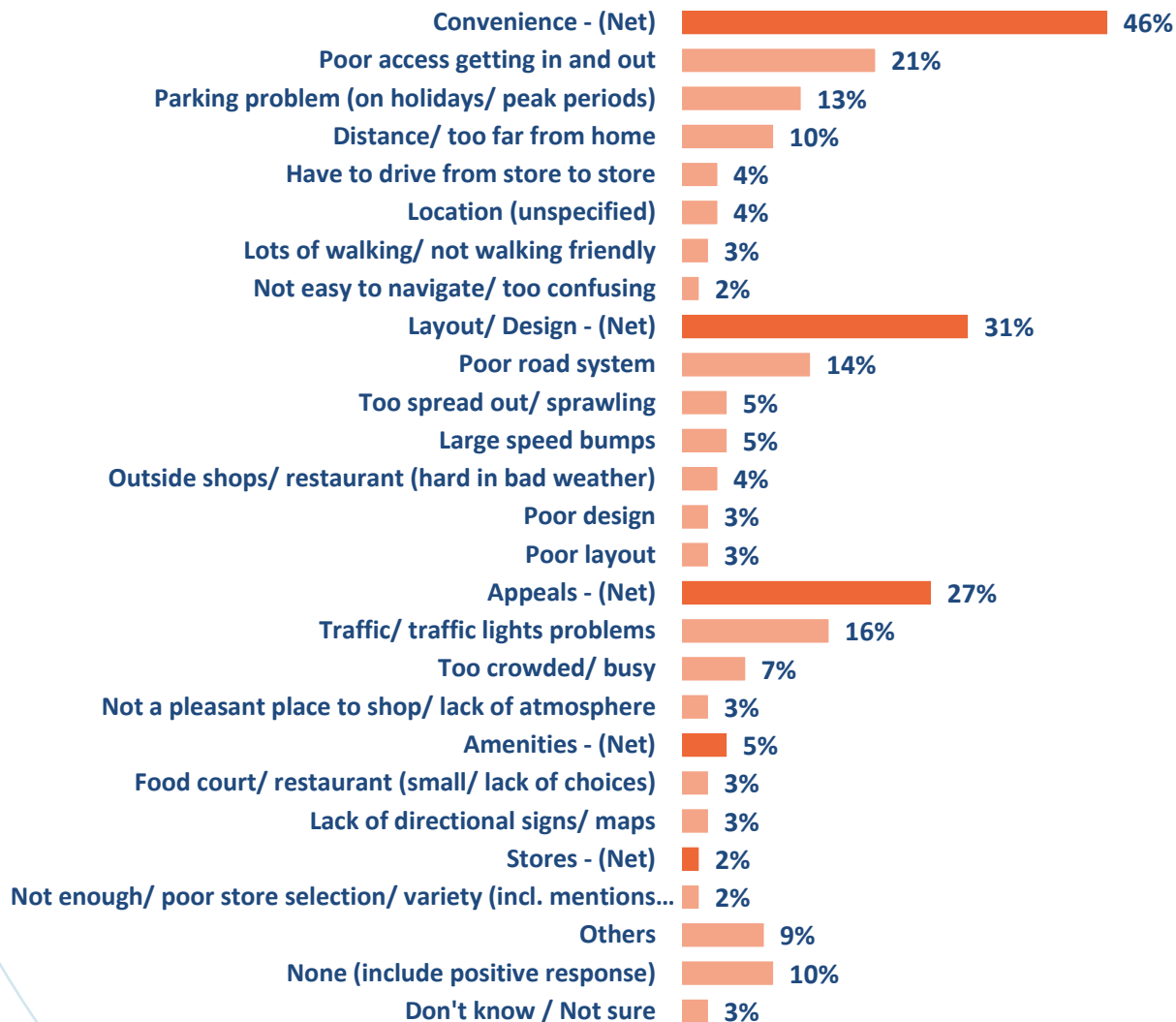


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Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Beacon Hill



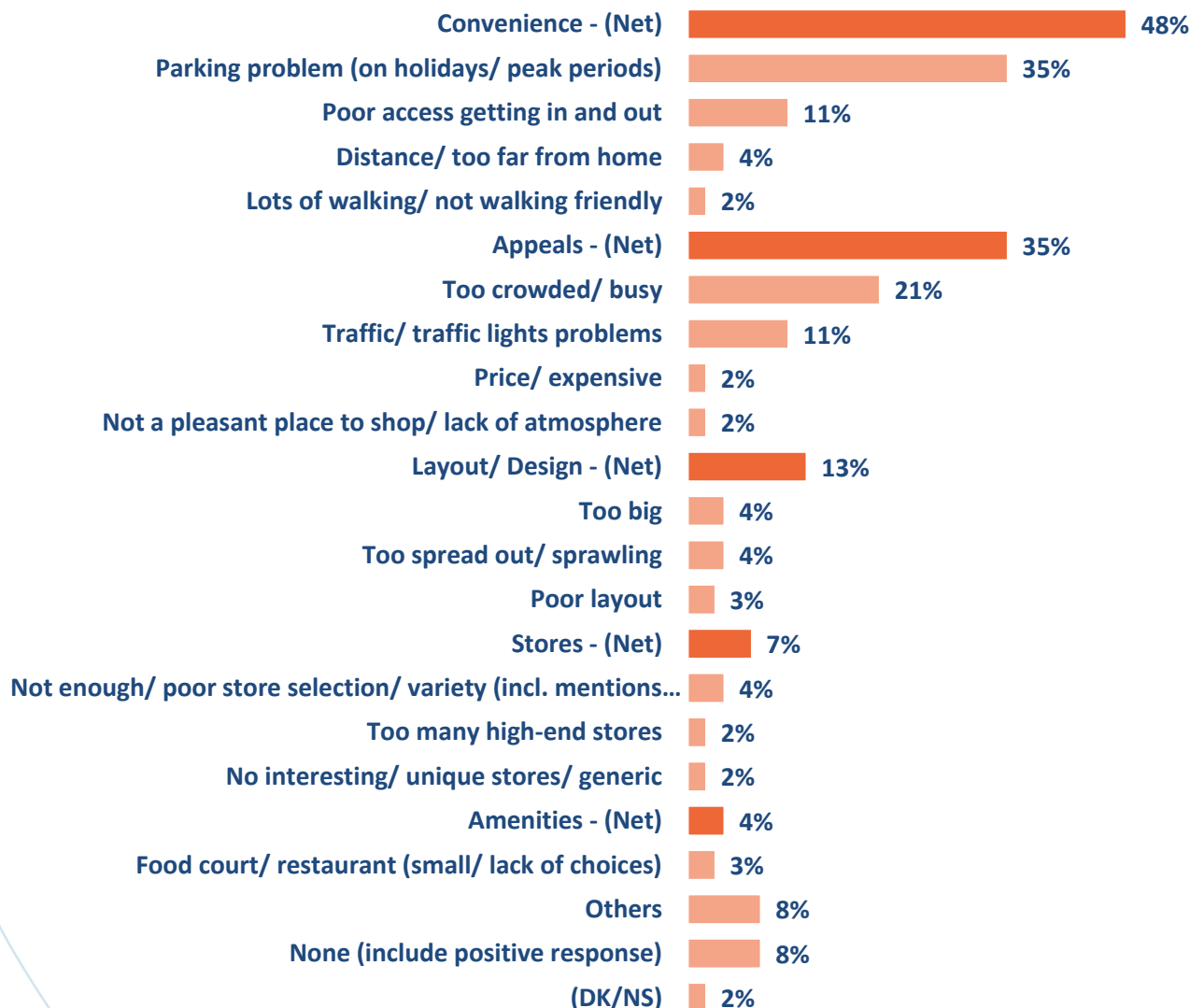
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Beacon Hill personally visited (n=81)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Chinook Centre



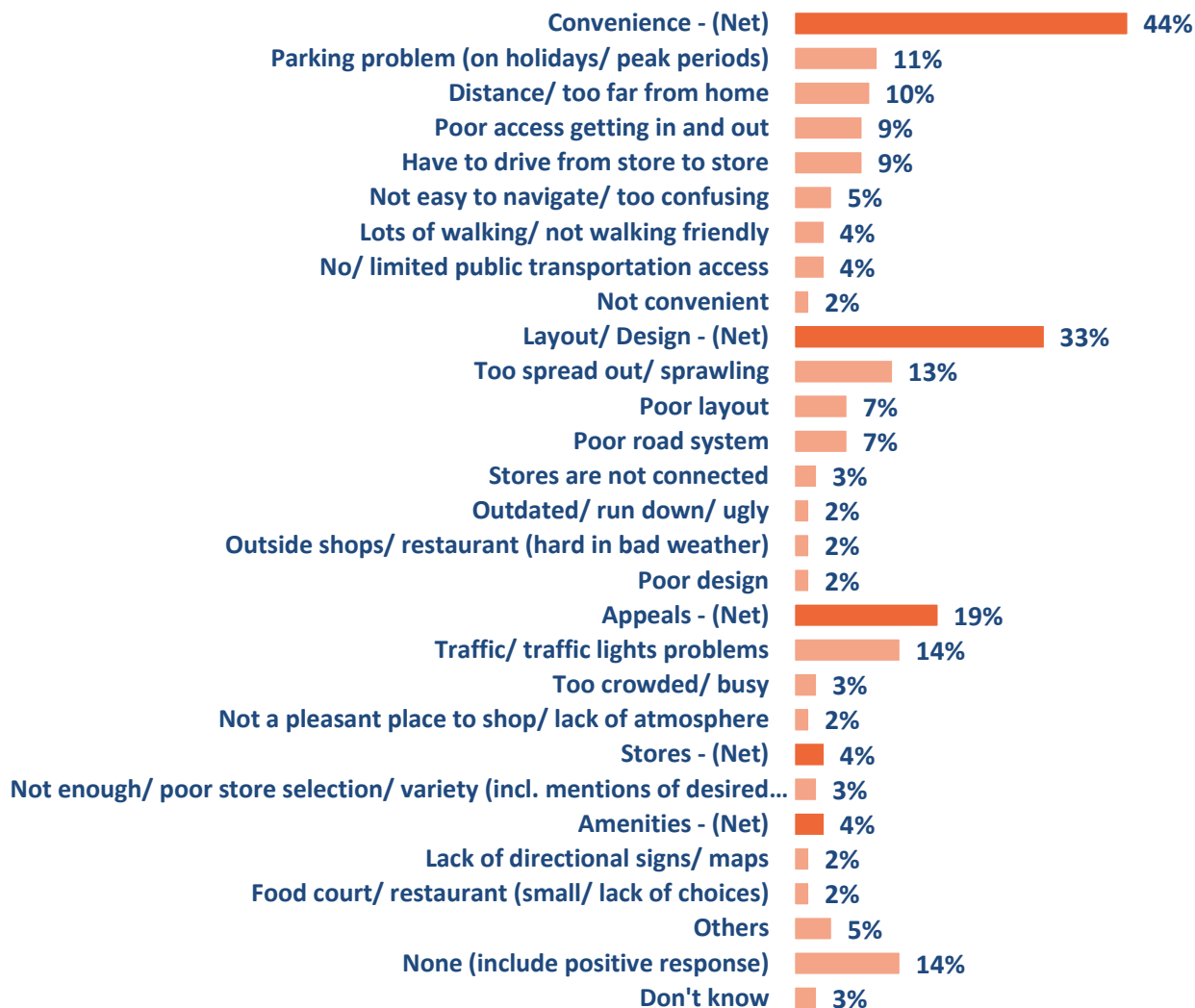
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Chinook Centre personally visited (n=223)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Deerfoot Meadows



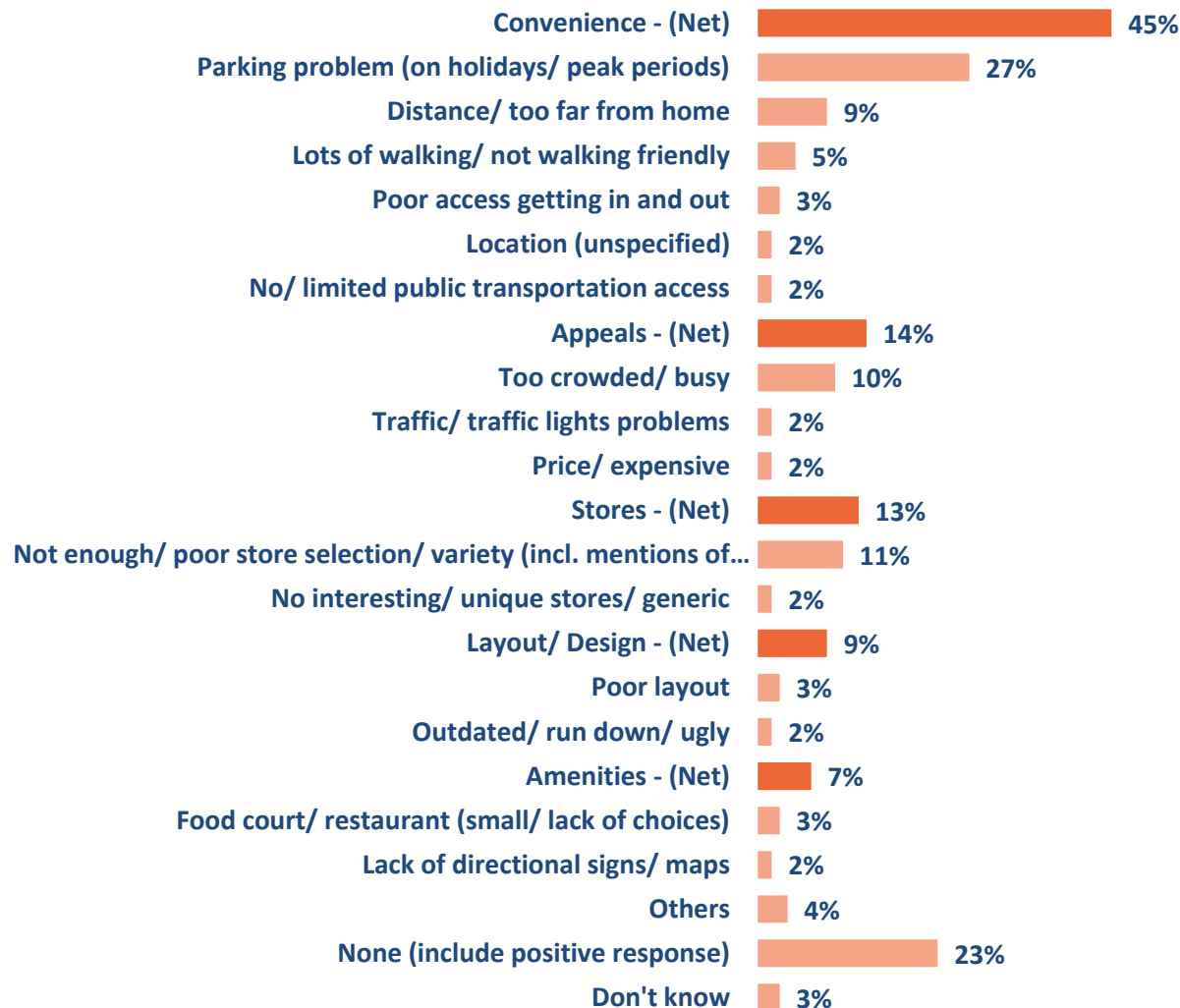
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Deerfoot Meadows personally visited (n=174)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Market Mall



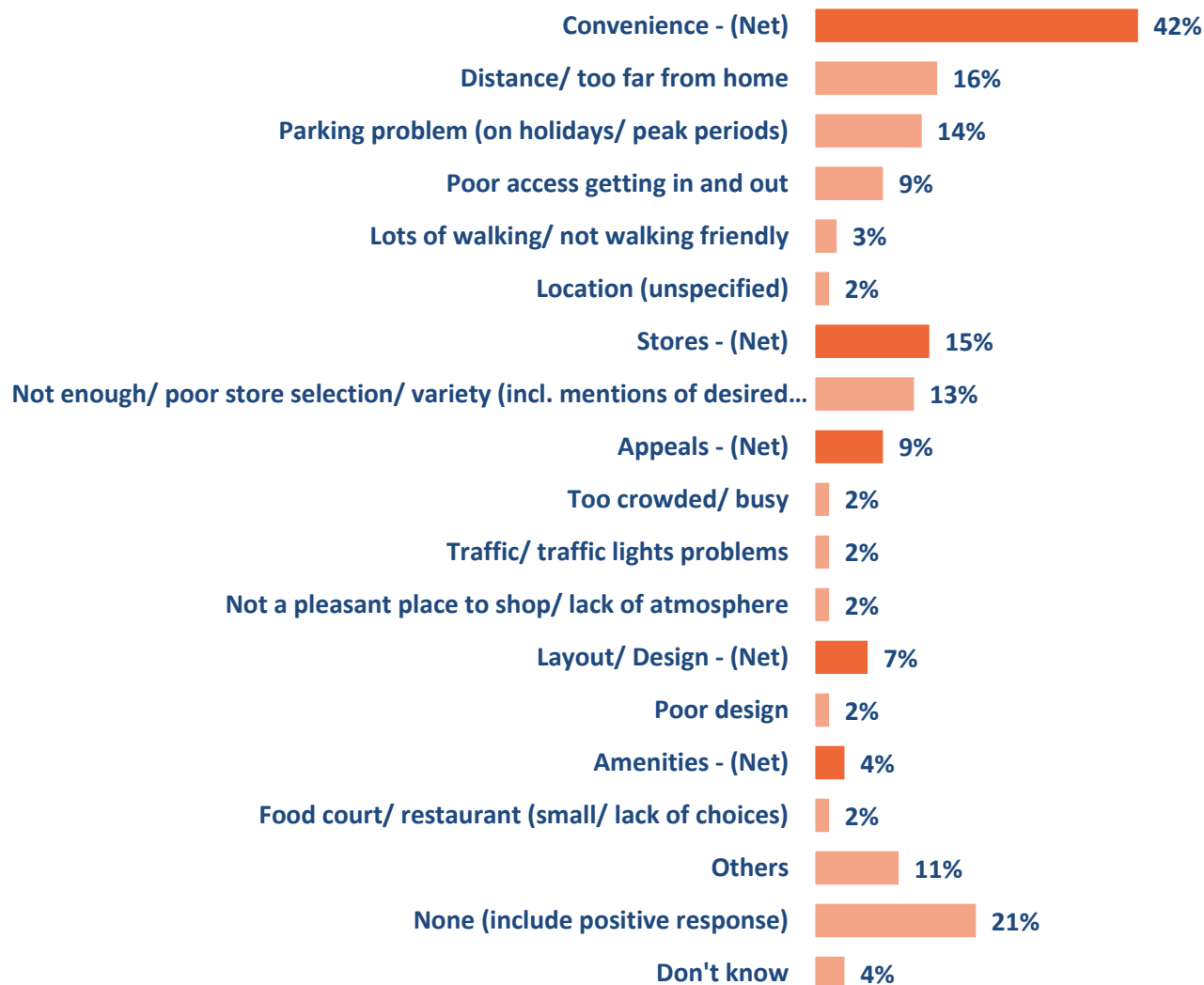
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Market Mall personally visited (n=177)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

Southcentre



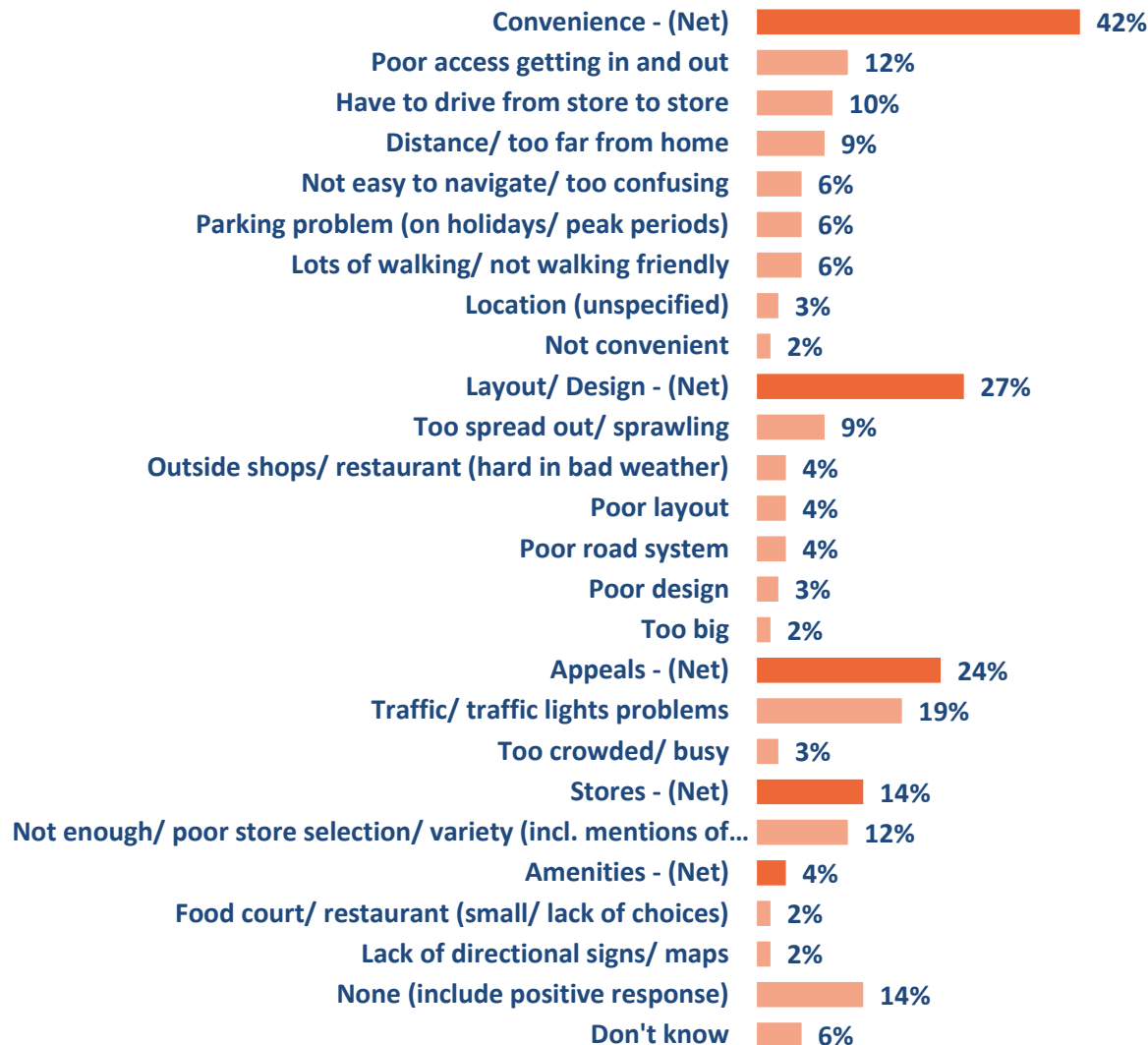
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: Southcentre personally visited (n=154)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

West Hills



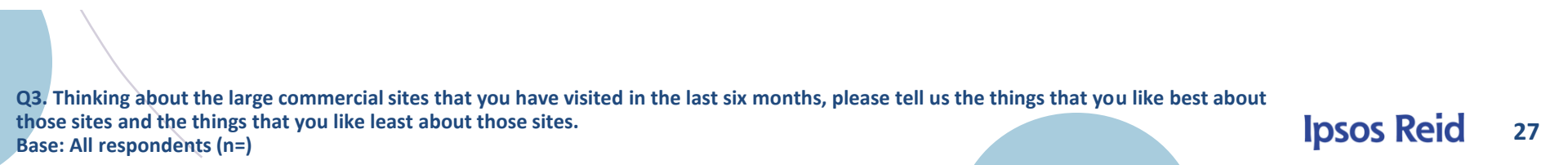
Responses of 1% and under not shown here

Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.

Base: West Hills personally visited (n=120)

Perceptions of Large Commercial Sites in Calgary – Things People Like Least

	Aspen Landing	Beacon Hill	Chinook Centre	Deerfoot Meadows	Market Mall	South-centre	West Hills
	n=31	n=81	n=223	n=174	n=177	n=154	n=120
Convenience - (Net)	56%	46%	48%	44%	45%	42%	42%
Appeals - (Net)	8%	27%	35%	19%	14%	9%	24%
Stores - (Net)	7%	2%	7%	4%	13%	15%	14%
Layout/ Design - (Net)	3%	31%	13%	33%	9%	7%	27%
Amenities - (Net)	-	5%	4%	4%	7%	4%	4%

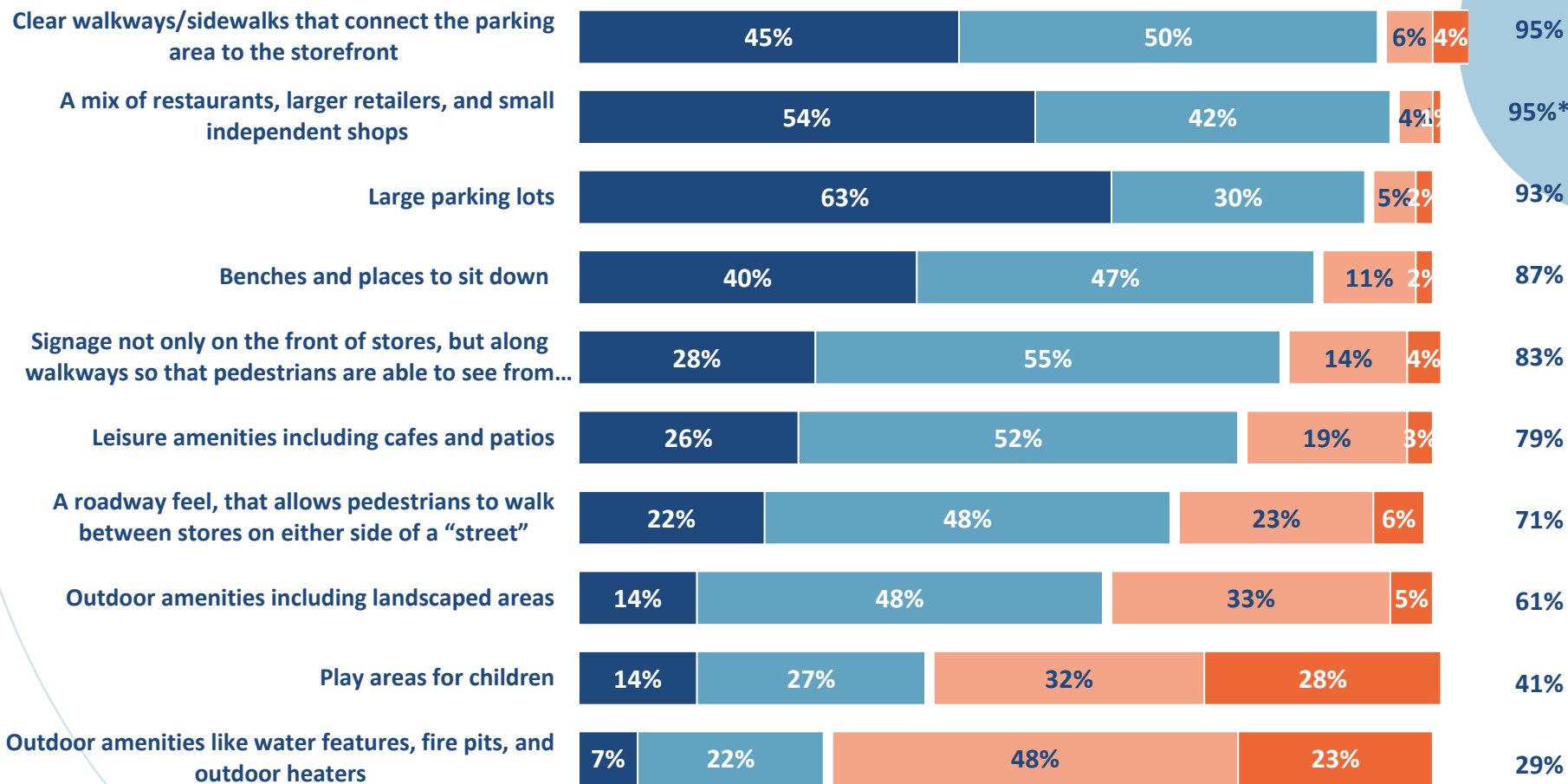


Base: All respondents (n=)

Importance of Factors When Shopping at a Large Commercial Site

A majority of Calgarians state that clear walkways connecting parking to storefront (95%), a mix of restaurants and shops (95%) and large parking lots (93%) are important when shopping at a large commercial site.

■ Very important ■ Somewhat important ■ Not very important ■ Not at all important % Important



*rounding

Q4. Next, please indicate whether each of the following items is important to you personally when shopping at a large commercial site.

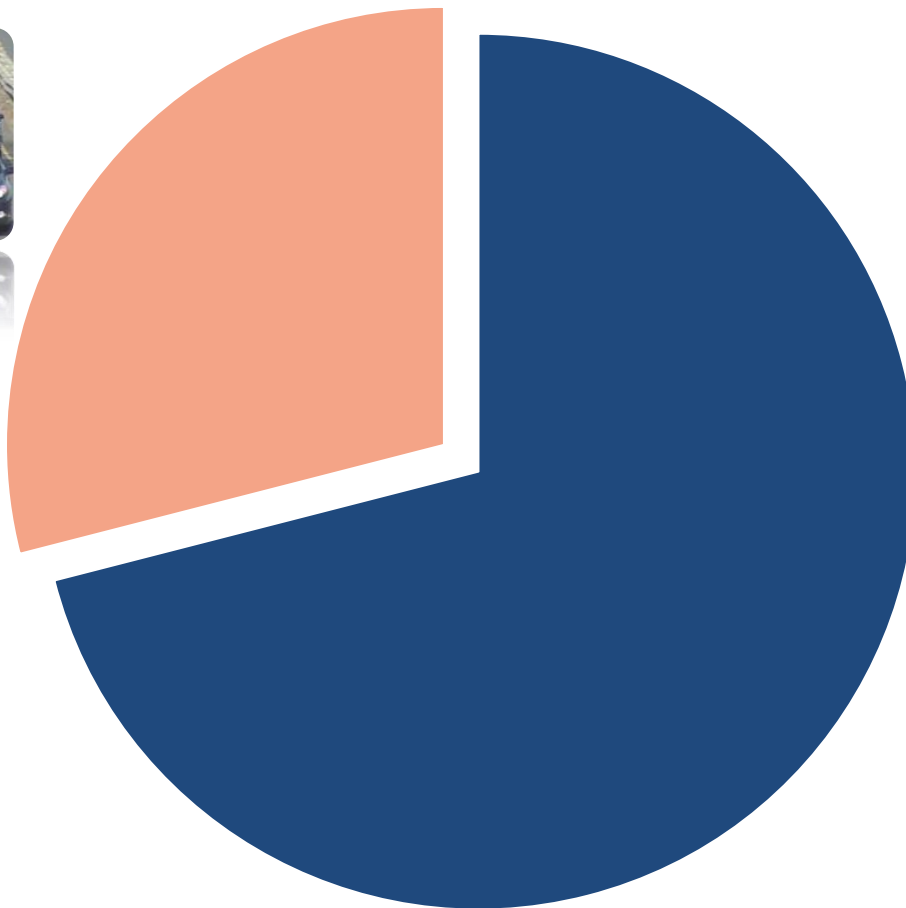
Base: All respondents (n=306)

Proximity of Shopping

Seven-in-ten Calgarians (71%) say that there is enough shopping close to their home. Approximately three-in-ten (29%) say that they need to travel elsewhere to get their shopping done.



Need to travel
elsewhere to get my
shopping done
29%



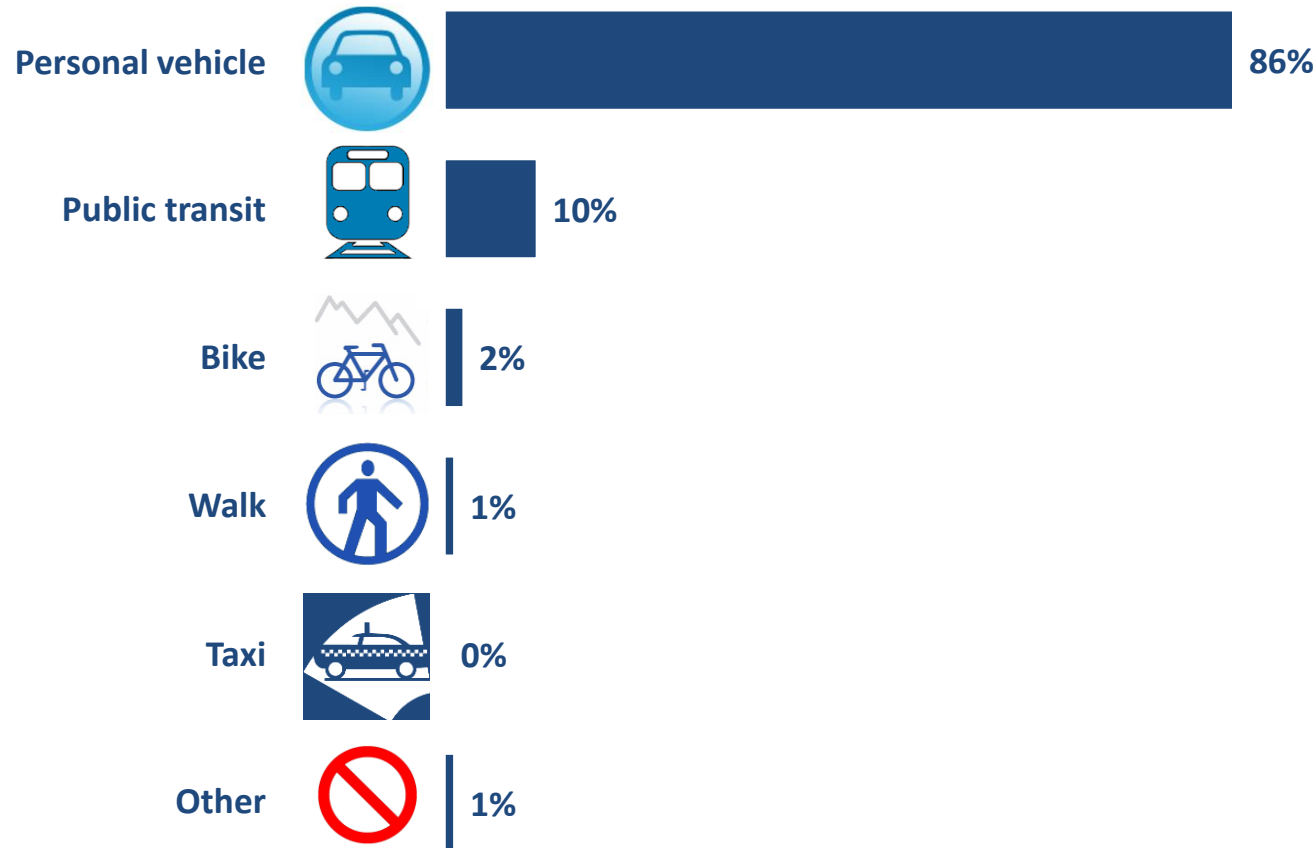
Enough shopping
close to my home
71%

Location



Mode of Transportation Used Most Often for Travel To and From Large Commercial Site

Most Calgarians (86%) use personal vehicles such as cars to travel to and from large commercial sites.

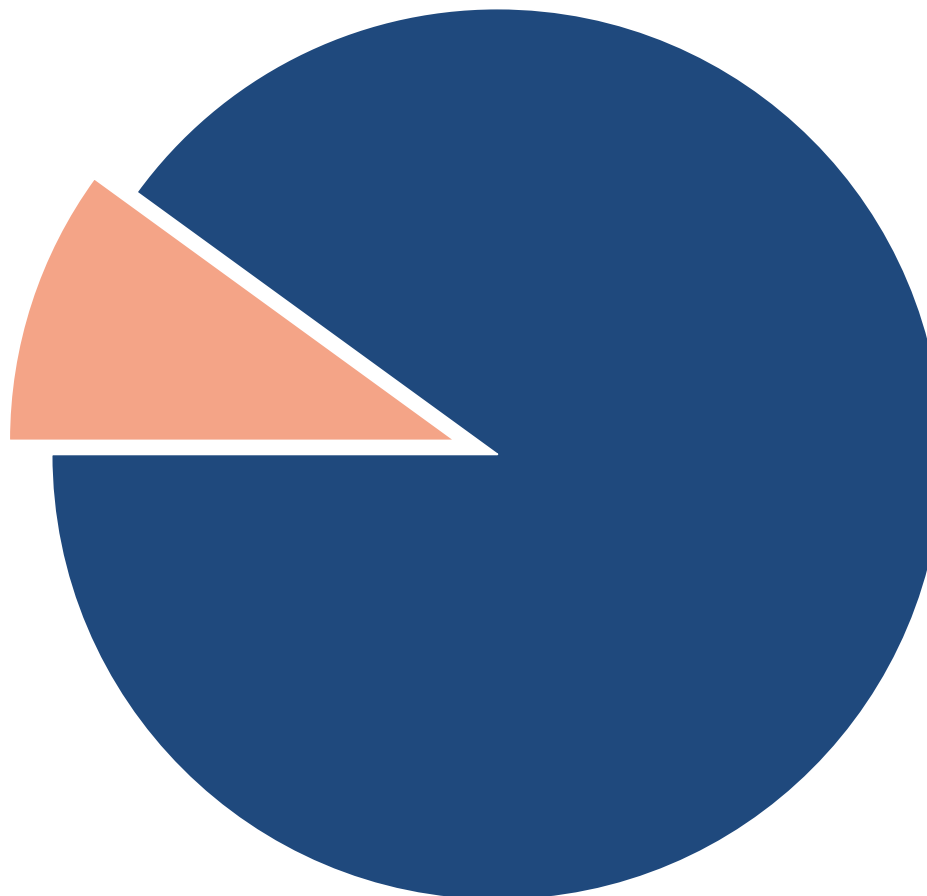


Shopping Preferences – Once at the Commercial Site

A majority of Calgarians (90%) prefer to walk from store to store once at the commercial site as opposed to drive between stores (10%).



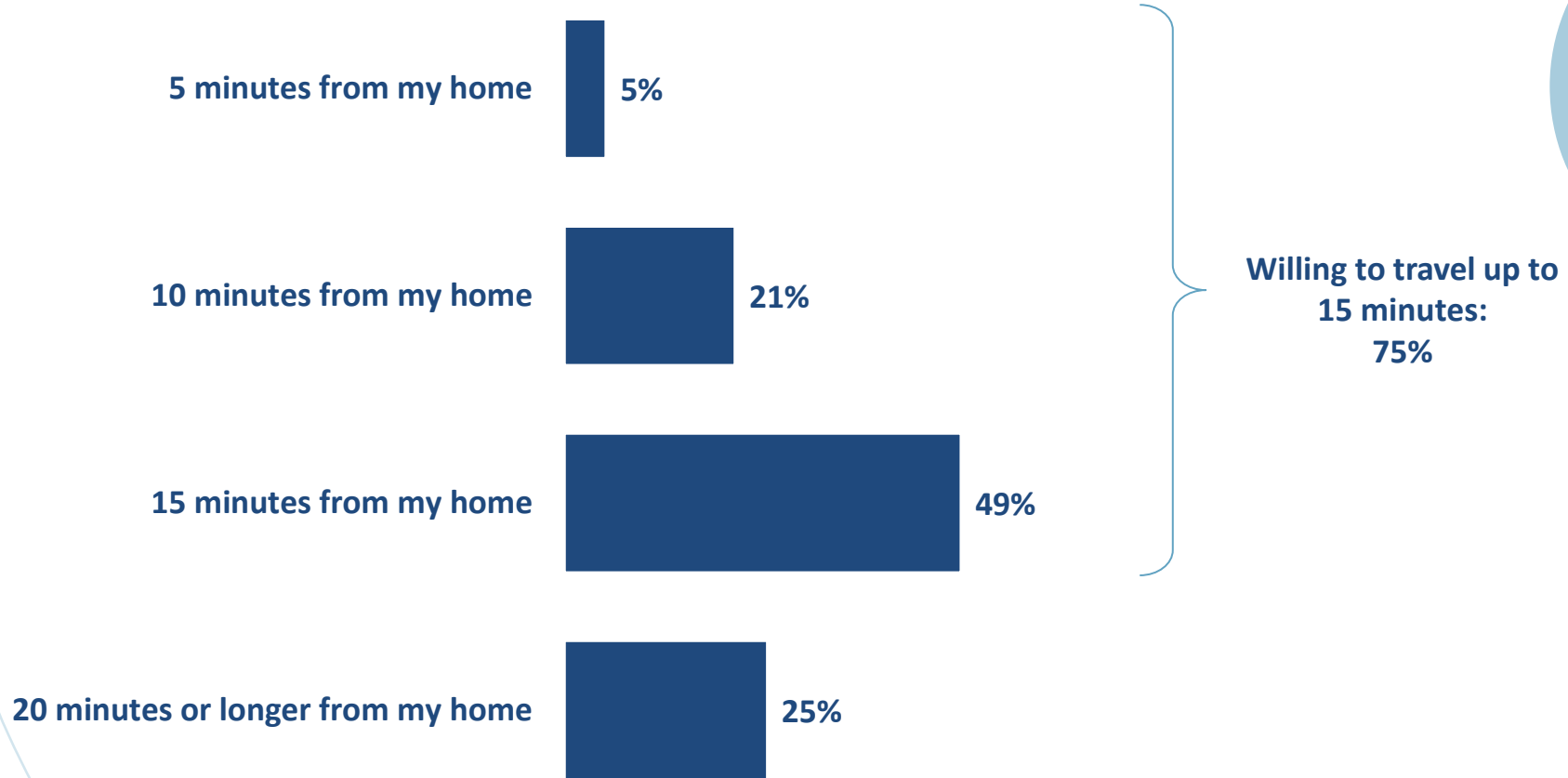
Drive between stores
10%



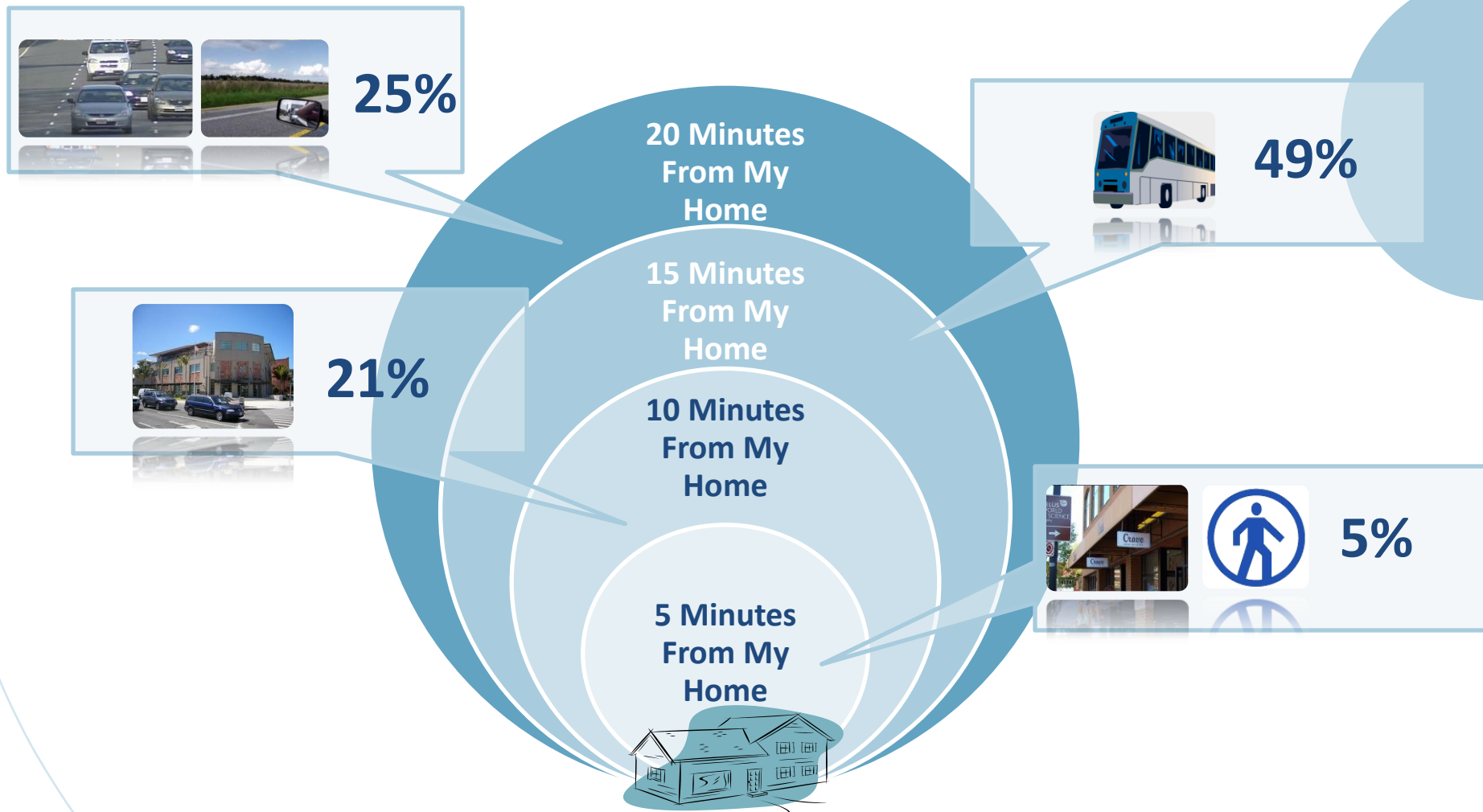
Walk from store to store
90%

Distance Willing to Travel to Visit One of Your Preferred Large Commercial Site Locations

Almost half of Calgarians surveyed (49%) are willing to travel 15 minutes from their home to visit one of their preferred commercial sites. A quarter (25%) are willing to travel 20 minutes or more.



Distance Willing to Travel to Visit One of Your Preferred Large Commercial Site Locations



Q7. Thinking about the location of large commercial sites, which of the following is the distance you are willing to travel to visit one of your preferred large commercial site locations?
Base: All respondents (n=306)

Building Forms / Site Plans



Preferences Concerning Large Commercial Sites

Calgarians surveyed prefer to visit one large mall with large parking lots in the summer (42%) as well as the winter (80%) compared to groups of small retail stores with small parking lots. 43% of Calgarians did not indicate a preference for the summer, whereas 16% stated that they do not have a preference in the winter.

In the Summer



In the Winter



Shopping Preferences – Store Layout

Four-in-ten Calgarians (40%) prefer stores with their doors facing inside, while the same number (41%) indicate that they don't have a preference. Approximately two-in-ten (19%) state that they prefer stores facing outwards.



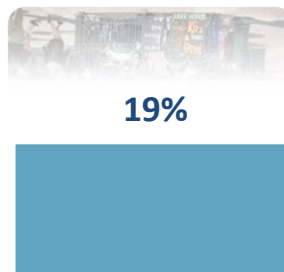
40%



Stores with their doors facing inside a building (indoor mall style with aisles/hallways)



19%



Stores directly facing outwards to a public area

41%



I don't have a preference

Shopping Preferences – Parking Layout

Calgarians are split in terms of parking preferences, with 24% saying that they prefer parkade parking and 30% saying that they prefer outdoor parking. Interestingly, almost half (46%) say that they do not have a preference.



24%

Indoor parking (parkade)



30%

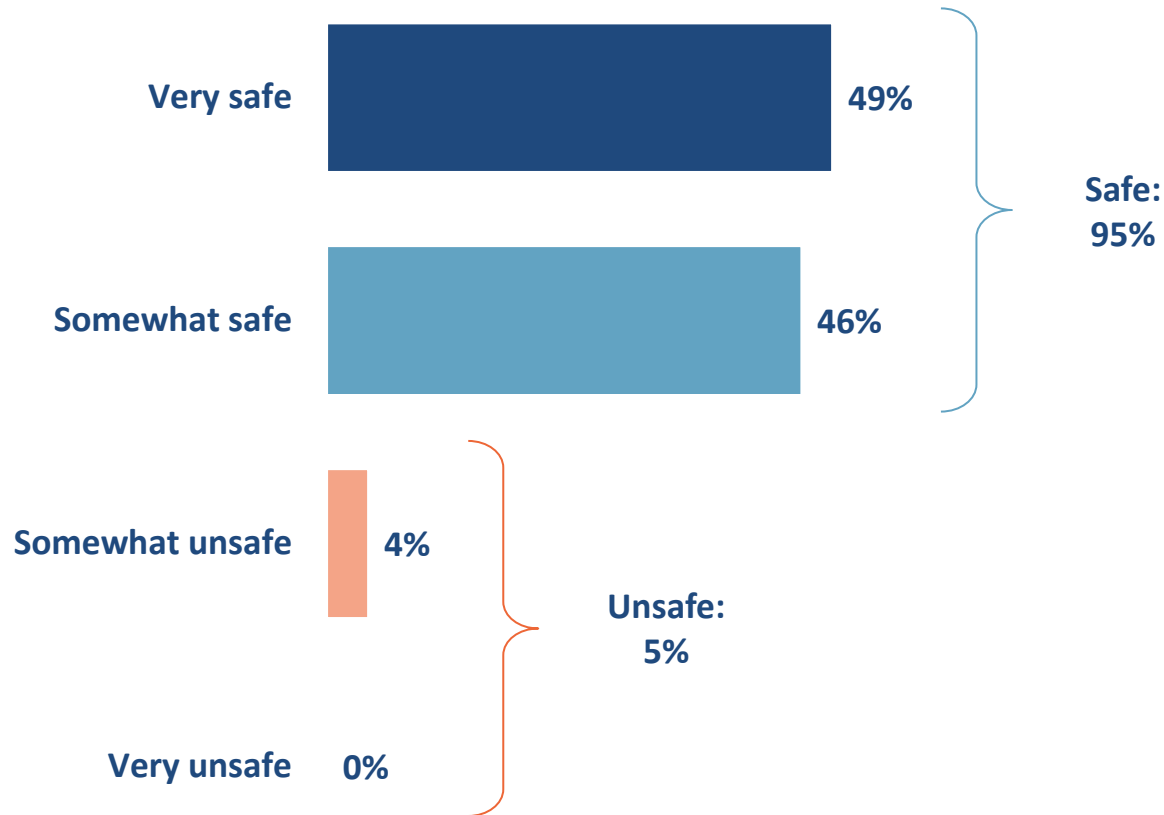
Surface parking (outdoor)

46%

I don't have a preference

Safety of Parking Lots

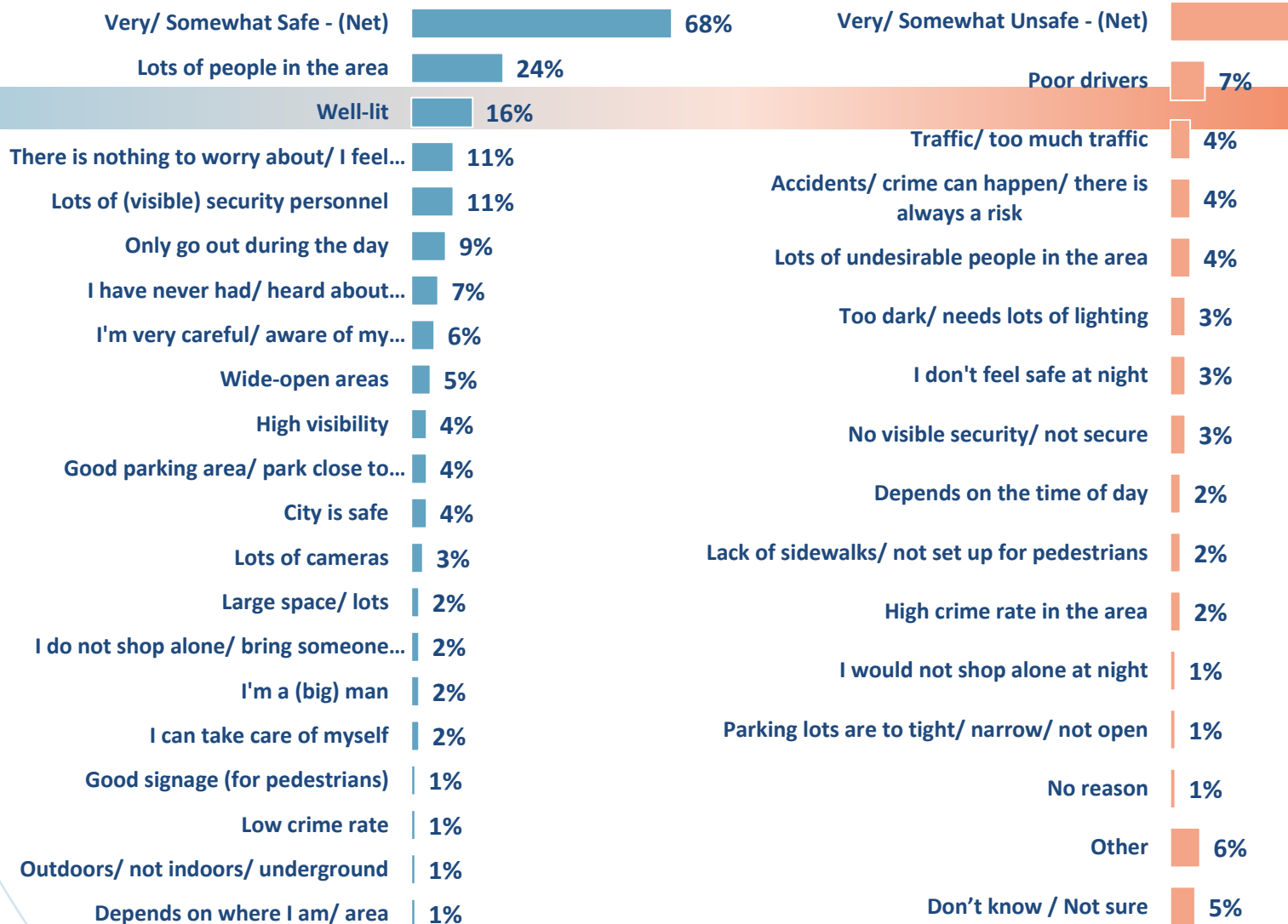
A majority of Calgarians (95%) feel safe walking in parking lots of large commercial sites. Only 5% indicated that they feel somewhat unsafe.



Q11. Thinking about the large commercial sites that you visit most often, do you generally feel safe or unsafe walking through their parking lots?

Base: All respondents (n=306)

Reasons for Feeling Safe or Unsafe in Parking Lots



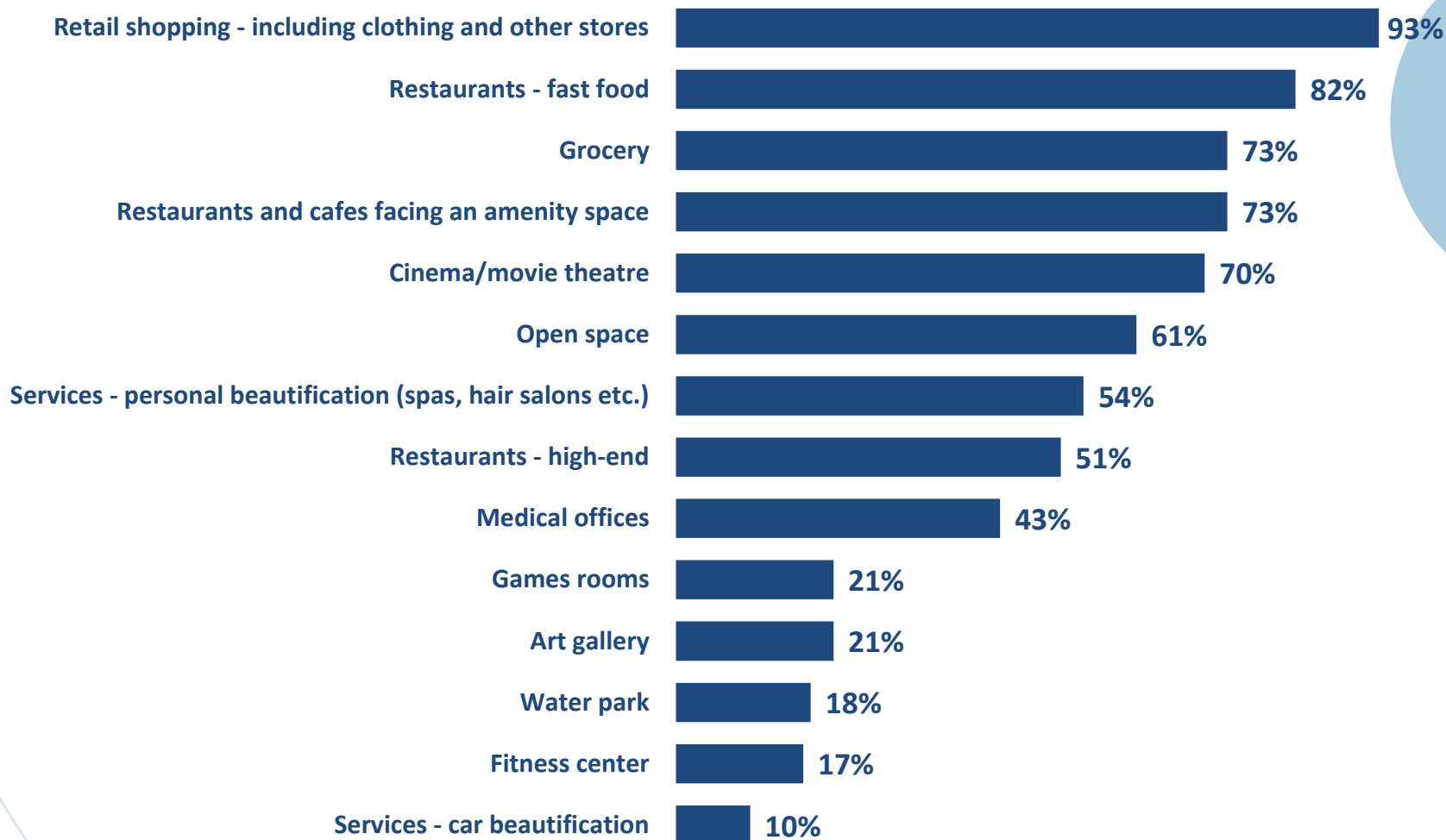
Preferences in Store Design

Almost half (51%) of Calgarians surveyed state that they do not have a preference when it comes to store design. But three-in-ten (29%) indicate that they prefer stores that are on one level and two-in-ten (20%) state that they prefer stores with multiple levels.



Amenities That Would be Included in Your Ideal Large Commercial Site

Calgarians list retail shopping as the top choice (93%) for amenities that could be included in their ideal commercial site, followed closely by fast food restaurants (82%), grocery (73%), restaurants and cafes facing amenity spaces like parks (73%) and cinemas (70%).



Q13. Next, we'd like you to think about your ideal large commercial site. Please select all of the amenities that you would include if designing a large commercial site that would best meet your own needs.

Base: All respondents (n=306)

Amenities That Would be Included in Your Ideal Large Commercial Site



Retail shopping –clothing and other stores – **93%**



Restaurants – fast food – **82%**



Grocery – **73%**



Restaurants and cafes facing an amenity space such as a park, playground, or water feature – **73%**



Cinema/movie theatre – **70%**



Open space – **61%**



Services – personal beautification (spas, hair salons etc.) – **54%**

Restaurants – high-end – **51%**



Medical offices – **43%**



Games rooms – **21%**



Art gallery – **21%**



Water park – **18%**



Fitness Center - **17%**



Services – car beautification – **10%**

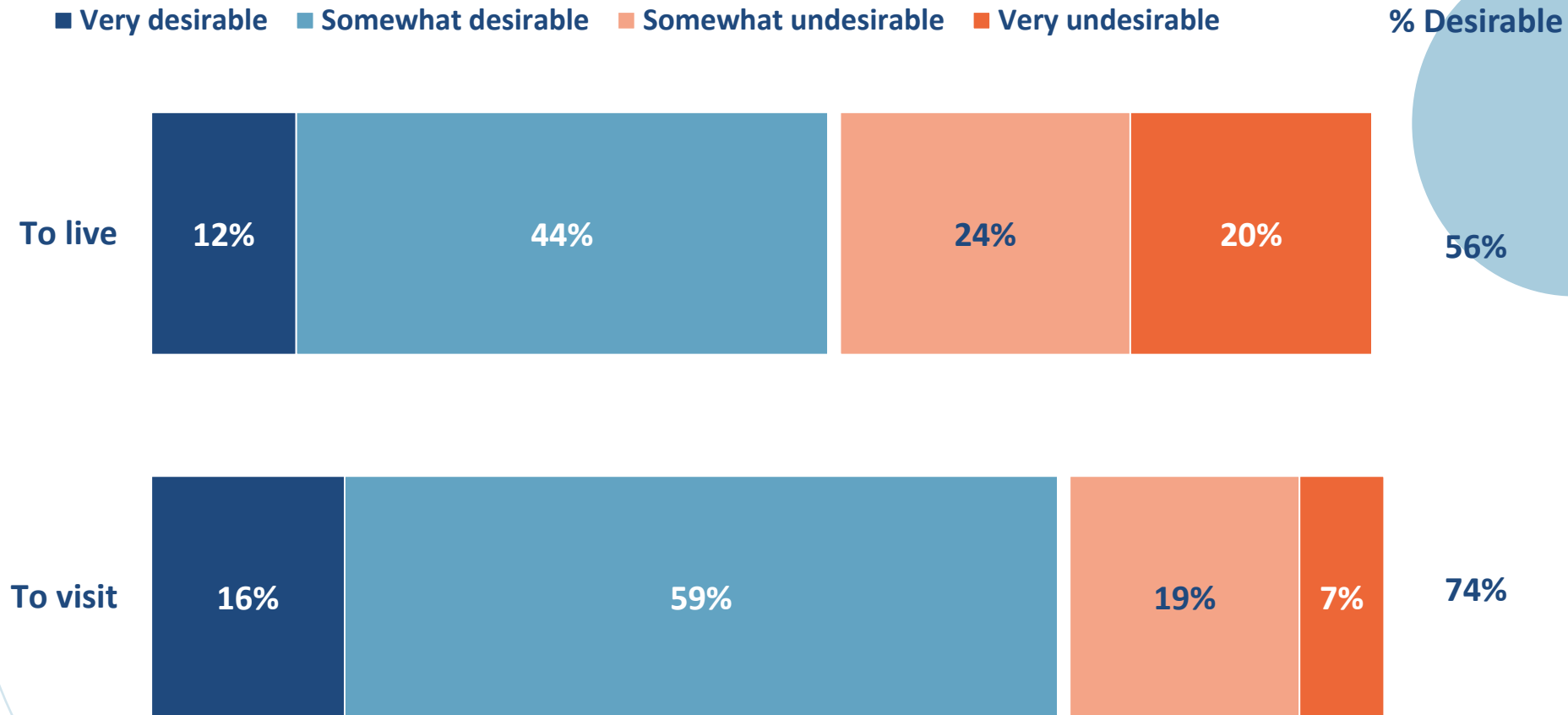


Q13. Next, we'd like you to think about your ideal large commercial site. Please select all of the amenities that you would include if designing a large commercial site that would best meet your own needs.

Base: All respondents (n=306)

Desirability of Buildings That Have Both Residential Units and Commercial Units

Almost six-in-ten (56%) of Calgarians state that living in buildings that have both residential units (above) and commercial units at street level are desirable to live in, whereas approximately seven-in-ten (75%) say that it is desirable to visit.



Demographics



People in Household

1	15%
2	36%
3	23%
4	15%
5	9%
6+	1%
Prefer not to answer	1%

People in Household under 18

Yes	34%
No	66%
Prefer not to answer	1%

Place of Residence

Own	72%
Rent	24%
Prefer not to answer	3%

Type of Dwelling

Single-detached house	67%
Semi-detached house / duplex / Row house / townhouse	15%
Mobile home / trailer	1%
Apartment or Condominium building with less than 6 units	3%
Apartment or condominium building consisting of 6 or more units	13%
Basement Suite	2%

Age

18 - 24	8%
25 - 34	25%
35 - 54	40%
55 or older	27%
<i>Mean</i>	<i>45</i>

Gender

Male	50%
Female	50%

Demographics

Years Living in Calgary

<1 year-5 years	11%
6-10 years	9%
11-15 years	11%
16- 20 years	10%
21-25 years	14%
26+ years	46%

Quadrant

Southwest	29%
Southeast	23%
Northwest	30%
Northeast	18%

Household Income

Under \$30,000	5%
\$30,000 to just under \$45,000	10%
\$45,000 to just under \$60,000	11%
\$60,000 to just under \$75,000	8%
\$75,000 to just under \$90,000	9%
\$90,000 to just under \$105,000	7%
\$105,000 to just under \$120,000	7%
\$120,000 to just under \$135,000	5%
\$135,000 to just under \$150,000	6%
\$150,000 and over	9%
Prefer to not answer	22%

Minority

Yes	18%
No	78%
Prefer not to answer	4%

Disability

Yes	14%
No	84%
Prefer not to answer	2%

Highest Level of Education

Completed high school or less	17%
Some post secondary or completed a college diploma	46%
Completed university degree or post-graduate degree	36%
Prefer not to answer	2%



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