



Ipsos Reid



THE CITY OF
CALGARY

THE CITY OF CALGARY LAND USE PLANNING & POLICY

LARGE COMMERCIAL URBAN DESIGN RESEARCH

PRESENTED BY: JAMIE DUNCAN, VICE PRESIDENT



July 2012

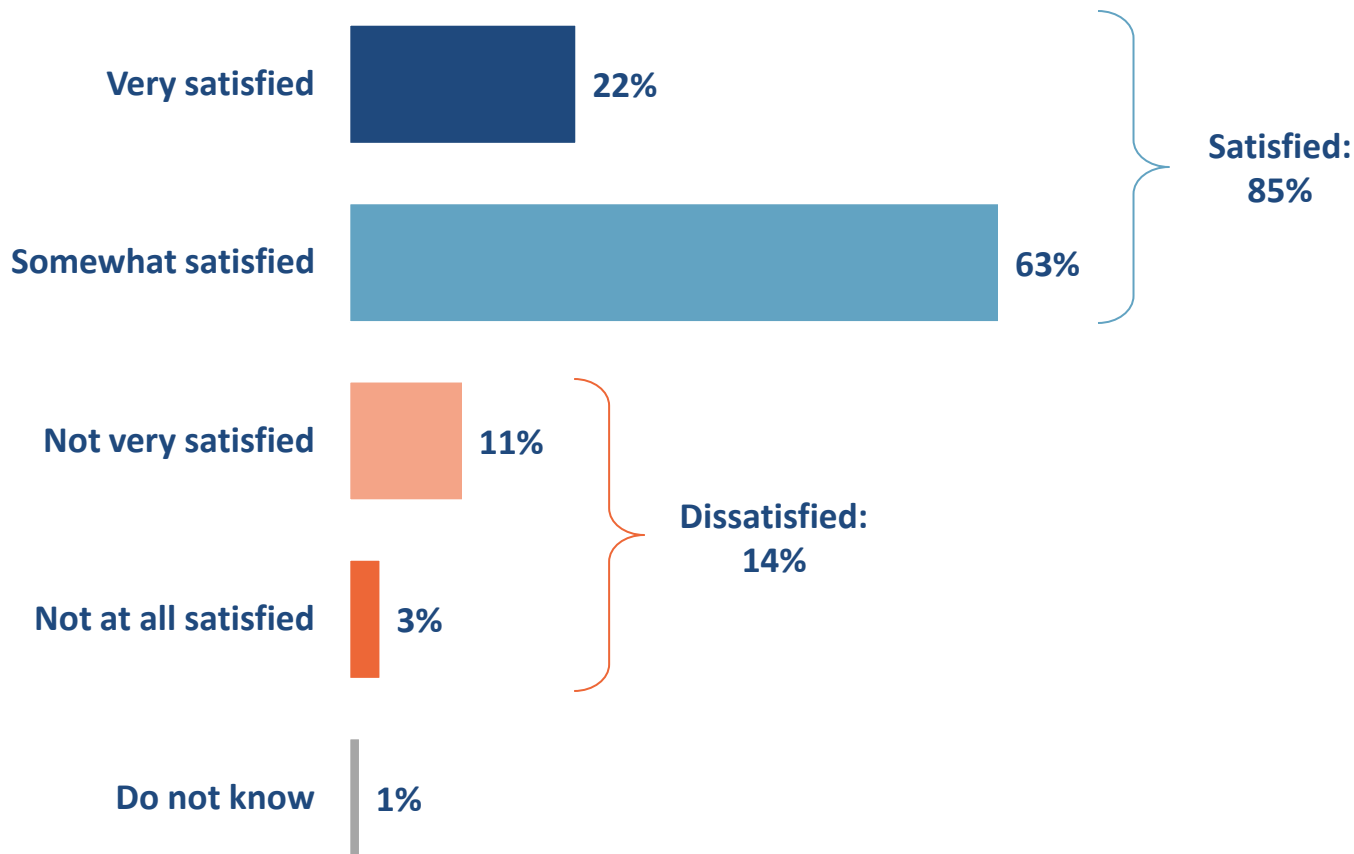
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Large Commercial Sites TODAY



Overall Satisfaction with Experience at Large Commercial Sites in Calgary

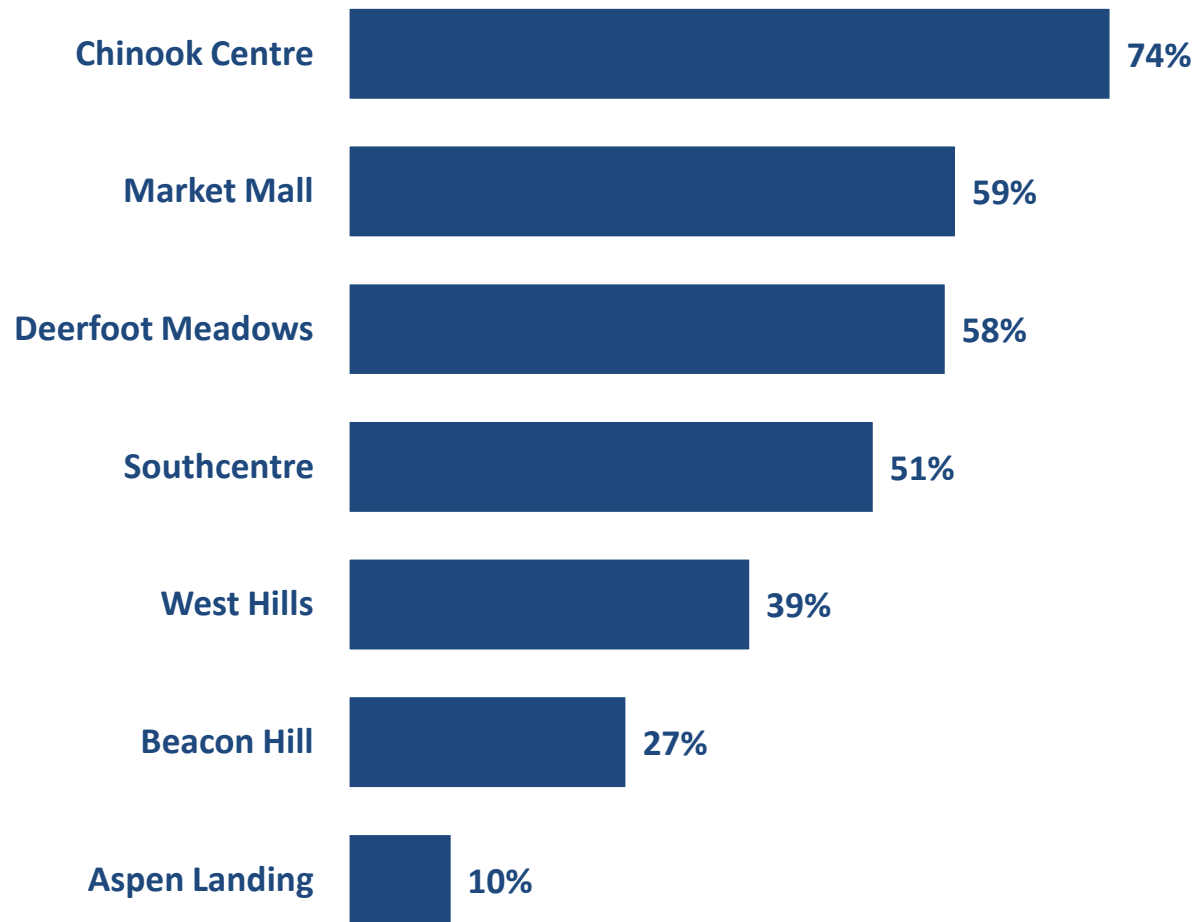
Eight-in-ten Calgarians (85%) are satisfied with the overall shopping experience at large commercial sites in Calgary.



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	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%

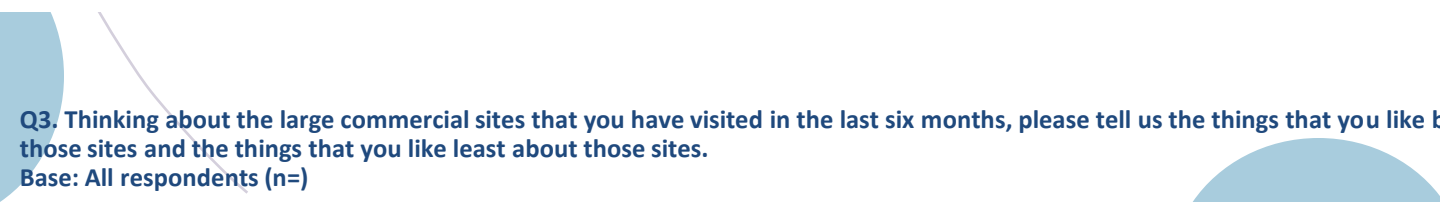
Q3. Thinking about the large commercial sites that you have visited in the last six months, please tell us the things that you like best about those sites and the things that you like least about those sites.



Base: All respondents (n=)

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%



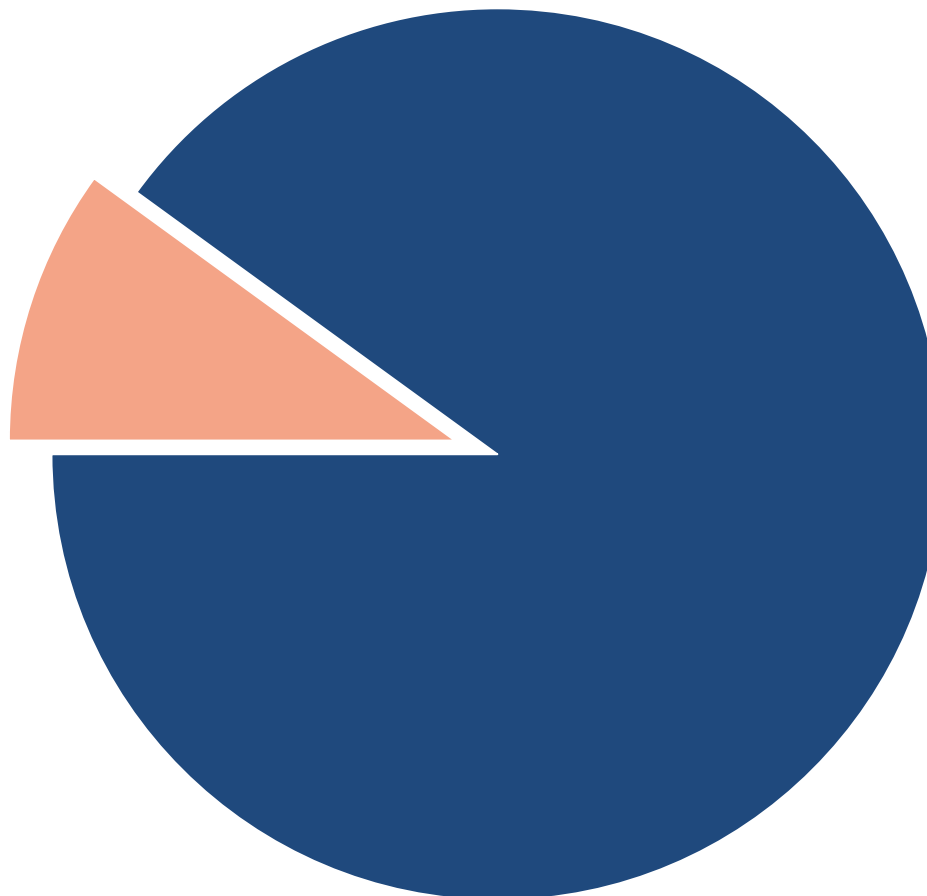
Base: All respondents (n=)

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%

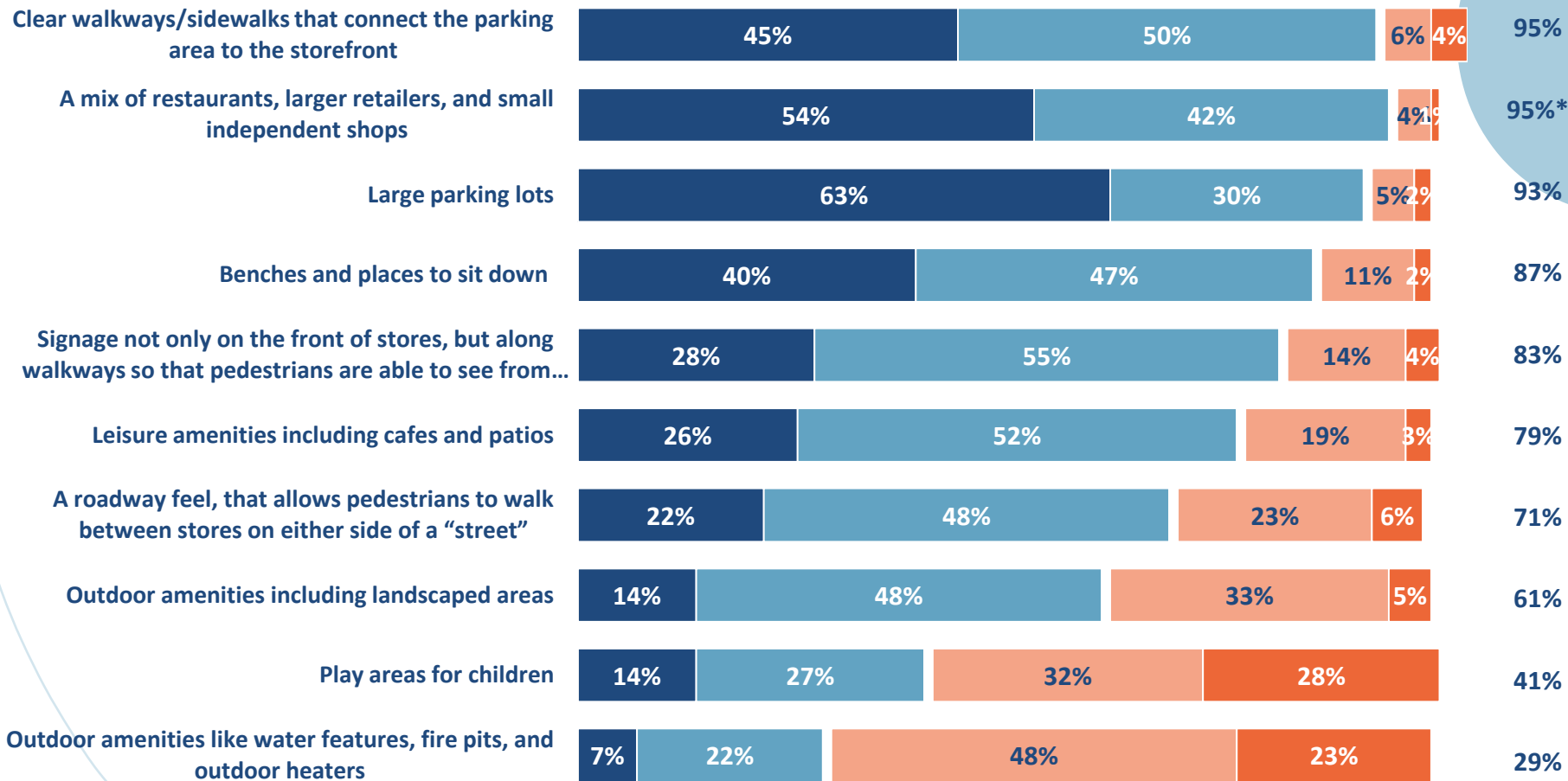
Large Commercial Sites WHAT'S IMPORTANT?



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)

Large Commercial Sites LOCATION

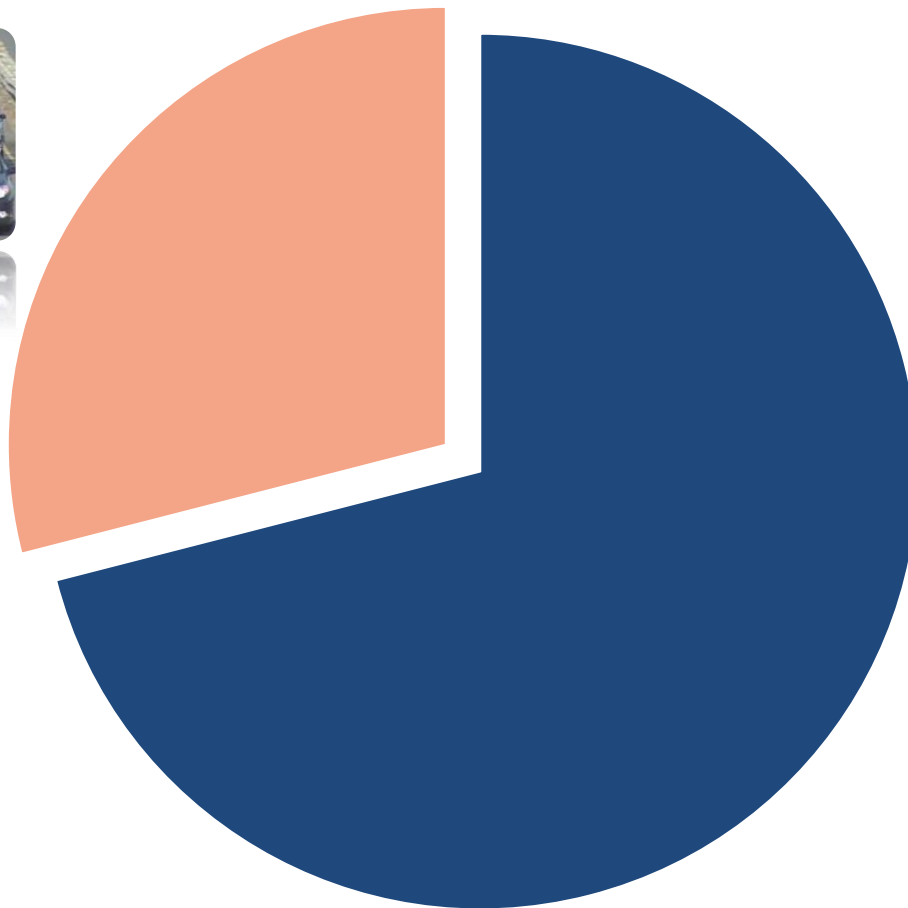


Proximity of Shopping

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%



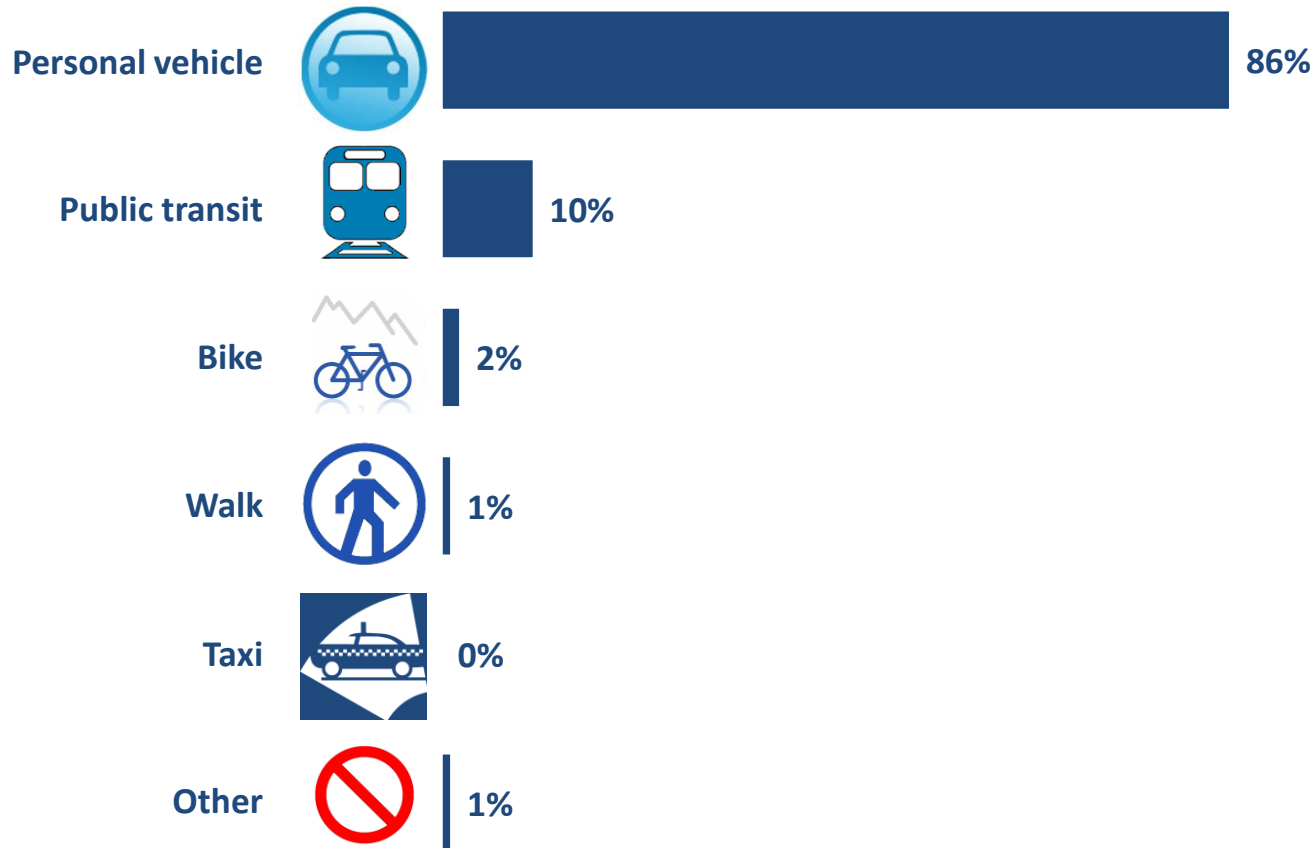
Enough shopping
close to my home
71%

Q5. Thinking about the area in which you live, would you say that there is enough shopping close by to meet your household's needs, or do you need to travel elsewhere to get your shopping done?

Base: All respondents (n=306)

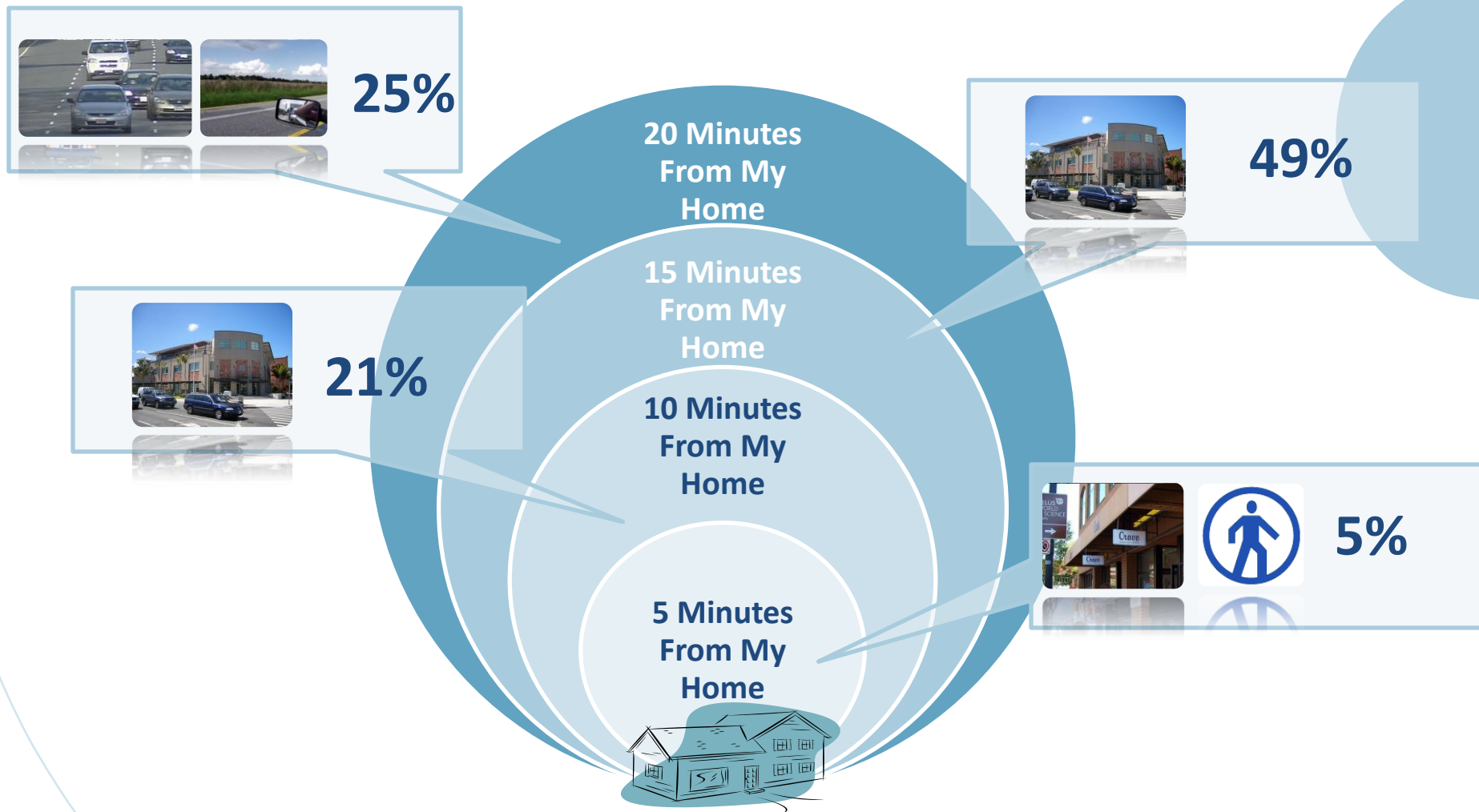
Mode of Transportation Used Most Often for Travel To and From Large Commercial Site

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



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.



Large Commercial Sites

CITIZEN PREFERENCES



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



42%



One large mall with large parking lots (indoor shopping)

15%



Groups of small retail stores with small parking lots

43%



I don't have a preference

80%



One large mall with large parking lots (indoor shopping)

In the Winter



4%



Groups of small retail stores with small parking lots

16%



I don't have a preference

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.



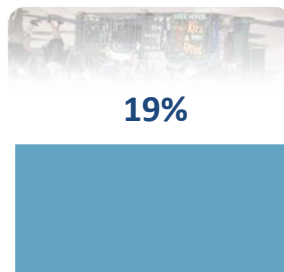
40%



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%

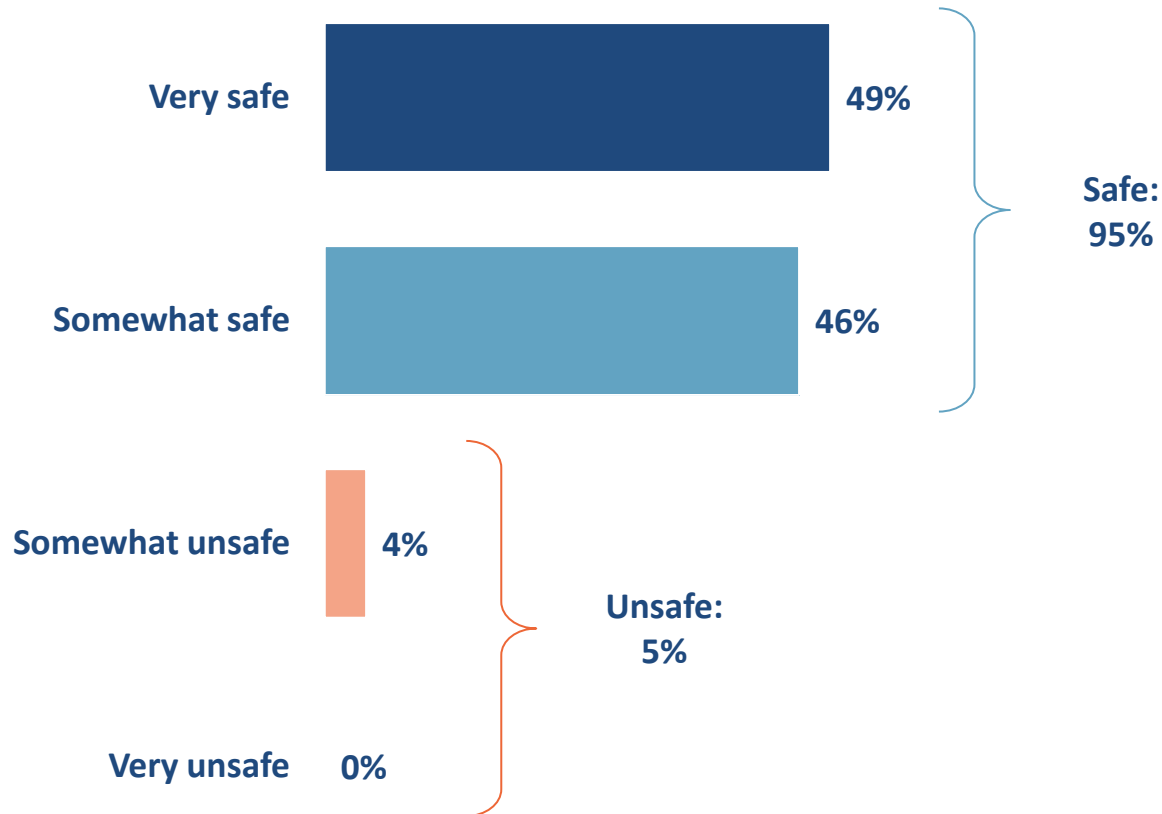
Surface parking (outdoor)

46%

I don't have a preference

Safety of Parking Lots

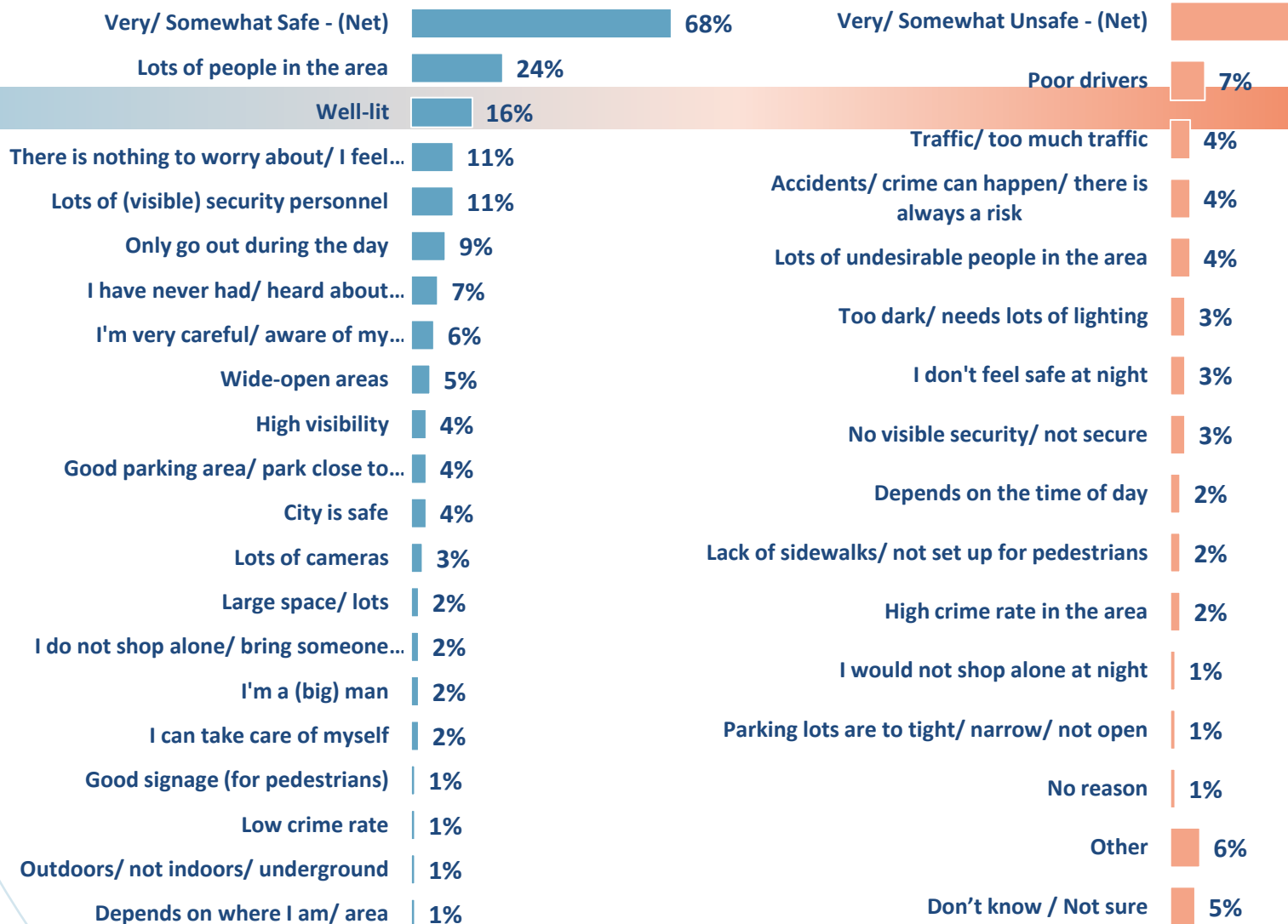
A majority of Calgarians (95%) feel safe walking in parking lots of large commercial sites. Only 5% indicated that they feel somewhat unsafe.



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

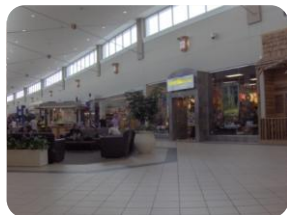
Base: All respondents (n=306)

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.



29%



Stores that are on one level



20%



Stores with multiple levels

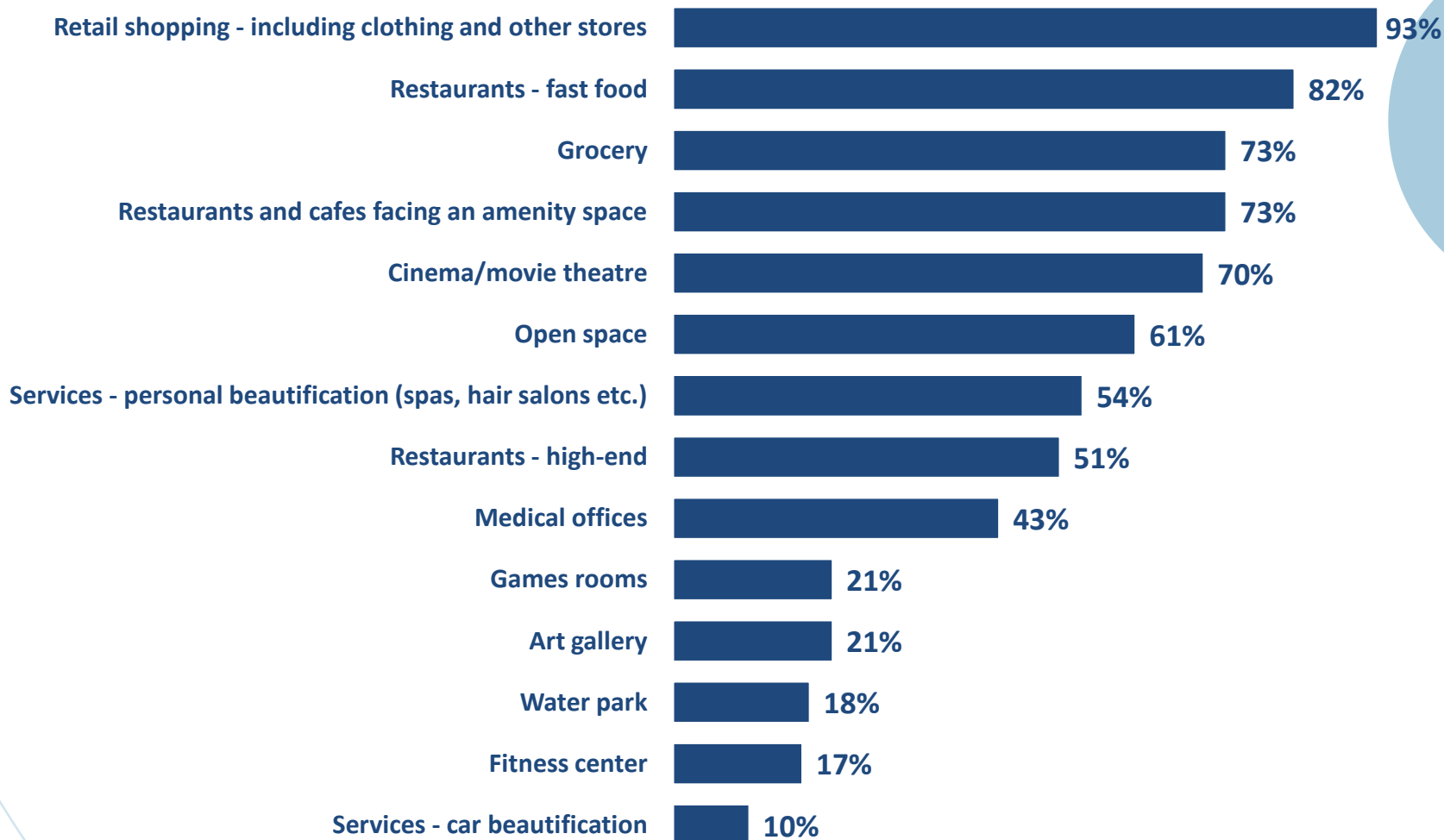
51%



I don't have a preference

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%**

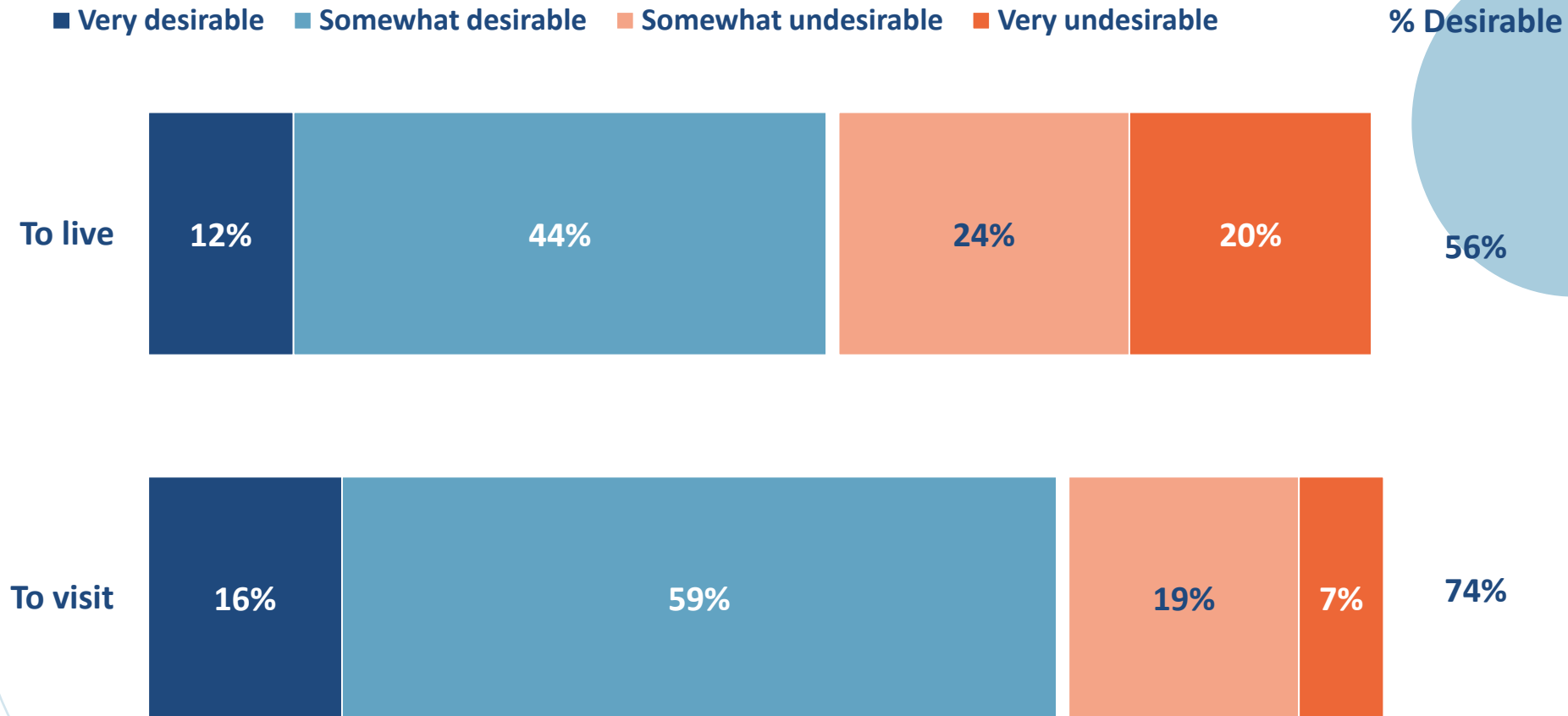


Q13. Next, we'd like you to think about your ideal large commercial site. Please select all of the amenities that you would include if designing a large commercial site that would best meet your own needs.

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.



Q14. How desirable is it to either live in or visit buildings that have both residential units (above) and commercial units (street-level). One example of this would be buildings in Garrison Green.
Base: All respondents (n=306)



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