

# **VICTORIA REGIONAL RAPID TRANSIT: SURVEY OF BUSINESSES, PROPERTY OWNERS, AND CUSTOMERS**

A Presentation to BC Transit  
***Final Results***

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# Presentation Overview

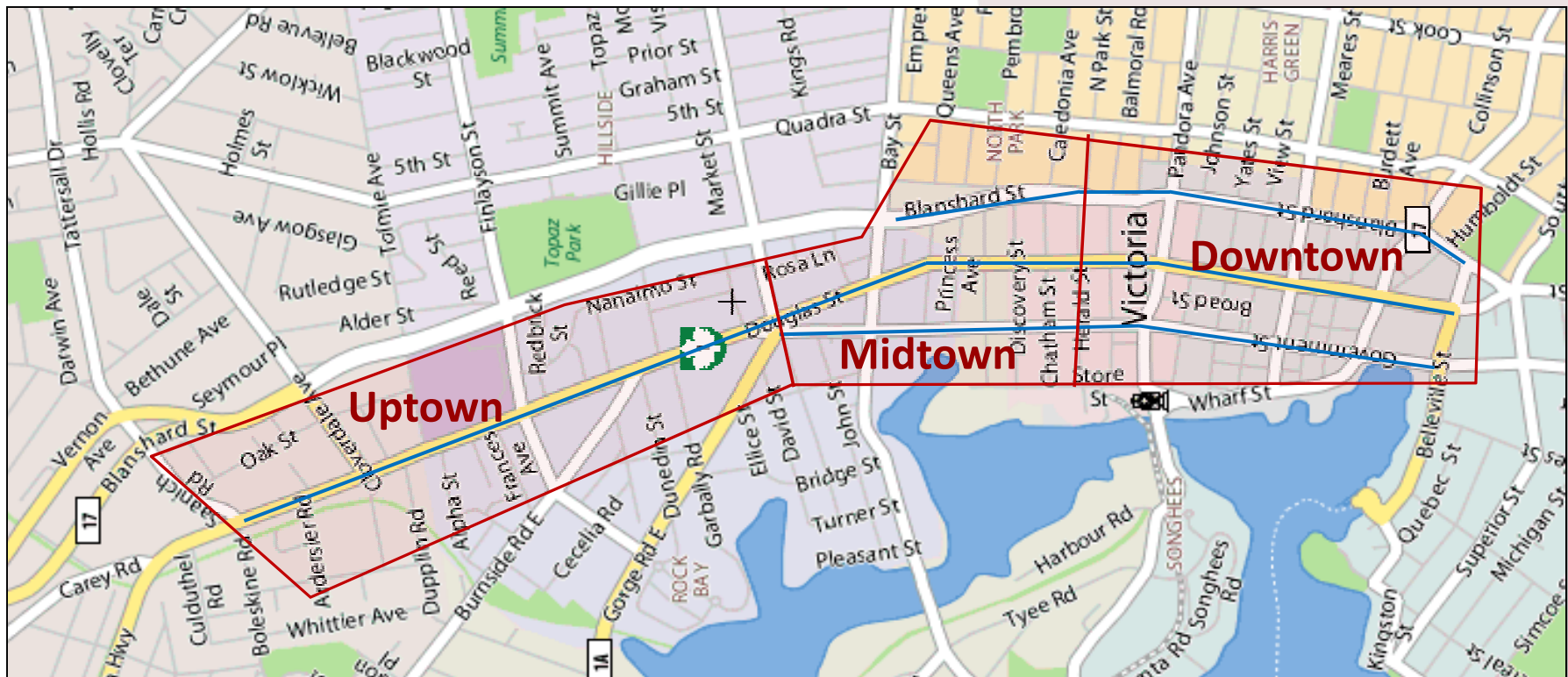
- Objective of the research
- Methodology
  - Target groups
  - Survey administration
  - Survey development
- Findings
  - Perceptions of businesses/property owners
  - Perceptions of customers
  - Key comparisons

# Objective

- To conduct surveys of businesses located along the uptown to downtown alignment, and their customers, to better understand the potential issues and opportunities associated with developing a rapid transit system along the proposed corridor

## Survey 'Catchment Area'

1. **Downtown Douglas (corridor)** – between Belleville and Herald
2. **Downtown Blanshard & Government (corridor streets)** – between Humboldt and Herald
3. **Downtown cross streets** within one block of corridor streets
4. **Midtown Douglas (corridor)** – between Herald and Hillside
5. **Midtown Blanshard – between Herald and Queens & Government (corridor)** – between Herald and Hillside
6. **Midtown cross streets** within one block of corridor streets
7. **Uptown Douglas (corridor)** – between Hillside and Saanich
8. **Uptown cross streets** within one block of corridor street



## Target Groups

**1. Business owners/operators** located in the catchment area [telephone listings]

**Property owners** whose property is in the catchment area [purchased from BC Assessment]

Exclusions: municipal, provincial gov't ; commercial hotel strata units  
Duplicates within and across lists were consolidated.

**2. Customers** of businesses on the main corridor streets within the catchment area

## Survey Design

### KEY AREAS OF INTEREST COMMON TO ALL SURVEYS

- Demographics of businesses and customers
  - Age of customer, likely time of visit, origin
- Reasons for customer visits
- Impact of various factors on customer volume/visits
  - Reduced general purpose traffic lanes
  - Reduced on-street parking
  - Improved streetscapes
  - Changes to on-site parking and loading access
- Overall support of rapid transit

## Survey Administration

### Businesses & Property Owners

- Survey period: July 19-30
- Mixed-mode: telephone, on-line, mail-out/mail-back
- Census approach (all known businesses, owners along corridor and cross-street)
- Businesses sent invitation letter, telephone follow-up
- Property owners mailed letter and survey
- **519 completions obtained**
- 22% gross responses rate
- sample error of  $\pm 4.2\%$  at a 95% confidence level, weighted data

### Customer Intercept Survey

- Survey period: July 19-July 25
- In-person, intercept surveys
- Representative sample of customers/clients of businesses located along corridor streets only
- **442 survey completions obtained**
- Sample error of  $\pm 4.7\%$  at a 95% confidence level

## Completions by Strata

STRATUM	BUSINESS SURVEY				CUSTOMER SURVEY	
	Number in Universe	# Business/Property Owner Surveys Completed	Gross Response Rate	Business/Property Owner Sample Error	# Customer Surveys Completed	Customer Sample Error
1. Downtown Douglas (corridor)	246	77	31%	±9.3%	117	±9.1%
2. Downtown Blanshard and Government (corridor)	226	73	32%	±9.5%	117	±9.1%
3. Downtown cross streets within one block of corridor streets	1,073	131	12%	±8.0%	n/a	n/a
<b>Downtown Subtotal</b>	<b>1,545</b>	<b>281</b>	<b>18%</b>	<b>±5.8%</b> <b>(D<sub>eff</sub>=1.21)<sup>(2)</sup></b>	<b>234</b>	<b>±6.4%</b>
4. Midtown Douglas (corridor)	132	41	31%	±12.8%	42	±15.1%
5. Midtown Blanshard and Government (corridor)	120	36	30%	±13.7%	20	±21.9%
6. Midtown cross streets within one block of corridor streets	210	37	18%	±14.7%	n/a	n/a
<b>Midtown Subtotal</b>	<b>462</b>	<b>114</b>	<b>25%</b>	<b>±8.2%</b> <b>(D<sub>eff</sub>=1.07)</b>	<b>62</b>	<b>±12.4%</b>
7. Uptown Douglas (corridor)	288	78	27%	±9.5%	146	±8.1%
8. Uptown cross streets within one block of corridor street	250	46	18%	±13.1%	n/a	n/a
<b>Uptown Subtotal</b>	<b>538</b>	<b>124</b>	<b>23%</b>	<b>±7.9%</b> <b>(D<sub>eff</sub>=1.038)</b>	<b>146</b>	<b>±8.1%</b>
<b>CORRIDOR Subtotal (1,2,4,5,7)</b>	<b>1,012</b>	<b>305</b>	<b>30%</b>	<b>±4.7%</b> <b>(D<sub>eff</sub>=1.005)</b>	<b>442</b>	<b>±4.7%</b>
<b>CROSS STREETS Subtotal (3,6,8)</b>	<b>1,533</b>	<b>214</b>	<b>14%</b>	<b>±6.3%</b> <b>(D<sub>eff</sub>=1.035)</b>	<b>n/a</b>	<b>n/a</b>
<b>GRAND TOTAL</b>	<b>2,545</b>	<b>519</b>	<b>20%</b>	<b>±4.2%</b> <b>(D<sub>eff</sub>=1.179)</b>	<b>442</b>	<b>±4.7%</b>

## Caveats

- Business/property owner survey data are weighted by corridor/cross-street strata – however, as with any survey, there may be sources of response bias that cannot be accounted for
- Overall results are quite reliable – results for sub-groups subject to greater sampling error
- Survey results reflect the perceptions/opinions of businesses and customers – may or may not translate into actual behaviours

# Findings

## Business/Property Owner Survey

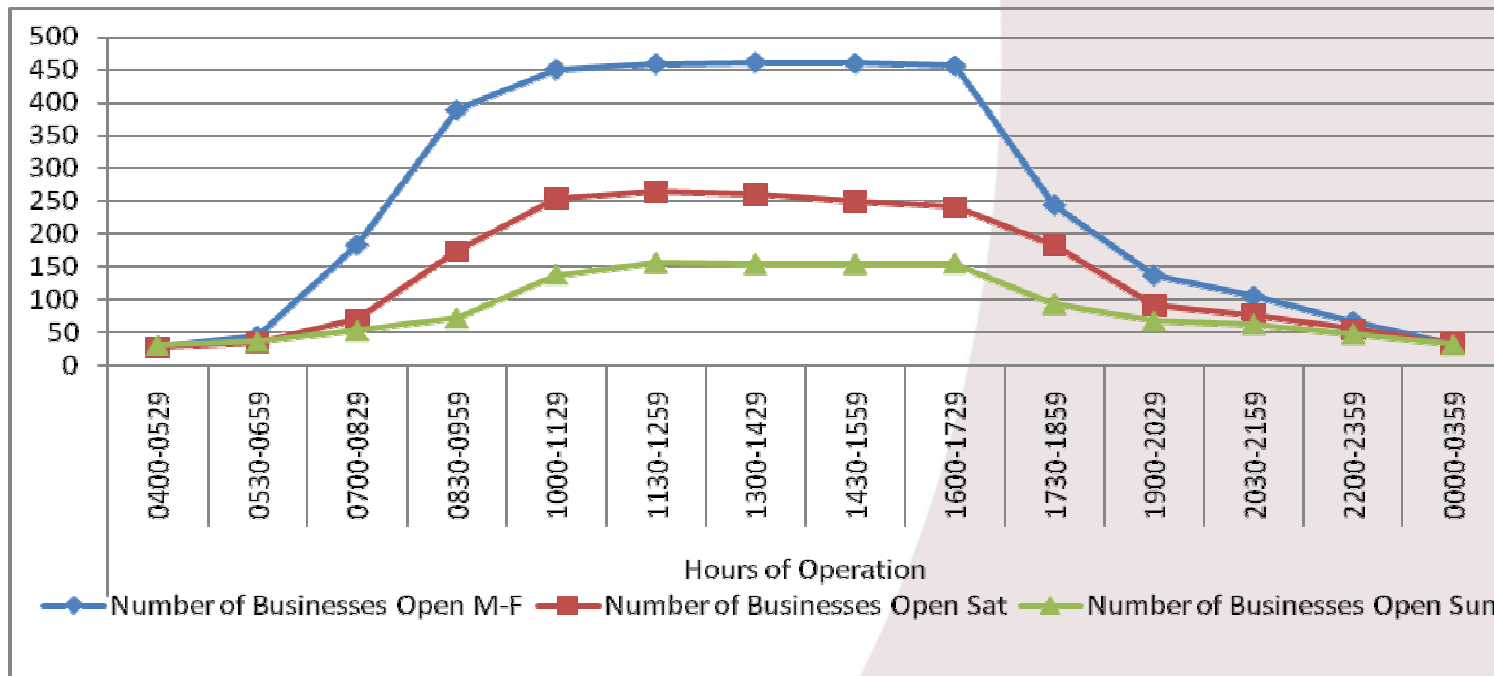
- Profile of survey respondents in the area
- Businesses' understanding of their customers
- Reliance on parking, loading options
- Effects of development of rapid transit
- Support for rapid transit

# Profile of Businesses/Property Owner Respondents

- 65% medium sized (1,000-10,000 sq ft), 18% small, 16% large or very large
- 55% in a bldg. w/ street store front, 26% in office bldg.
- 30% retail, 18% business services, 19% professional services, 11% food and beverage, 5% personal services, 15% other (financial institutions, education, etc)
- Of note, only 4% wholesale, manufacturing, or transportation & warehousing

## Businesses Hours of Operation

- Weekday hours – majority fall within 8:30 AM to 6:59 PM window
- Weekday peak busy time 1:00 PM to 2:29 PM  
(also busy 10:00 AM through 12:59 PM and 4:00 PM to 5:29 PM)



# Businesses' Understanding of Customers

- Most businesses see their customer base as
  - weighted towards ages segments between 30 and 64 years
  - predominantly from within the Victoria (91% indicating this) and Saanich (63%), but also from across region (at least 48% report having customers from each of the other municipalities in the CRD)
  - most often drive to get to their business (63% indicate most often customers drive)
  - fewer reported customers most often use transit (13%) or walk (13%)
- Believe 82% of visits are planned (vs. impulse)

# Findings – Business/Property Owners

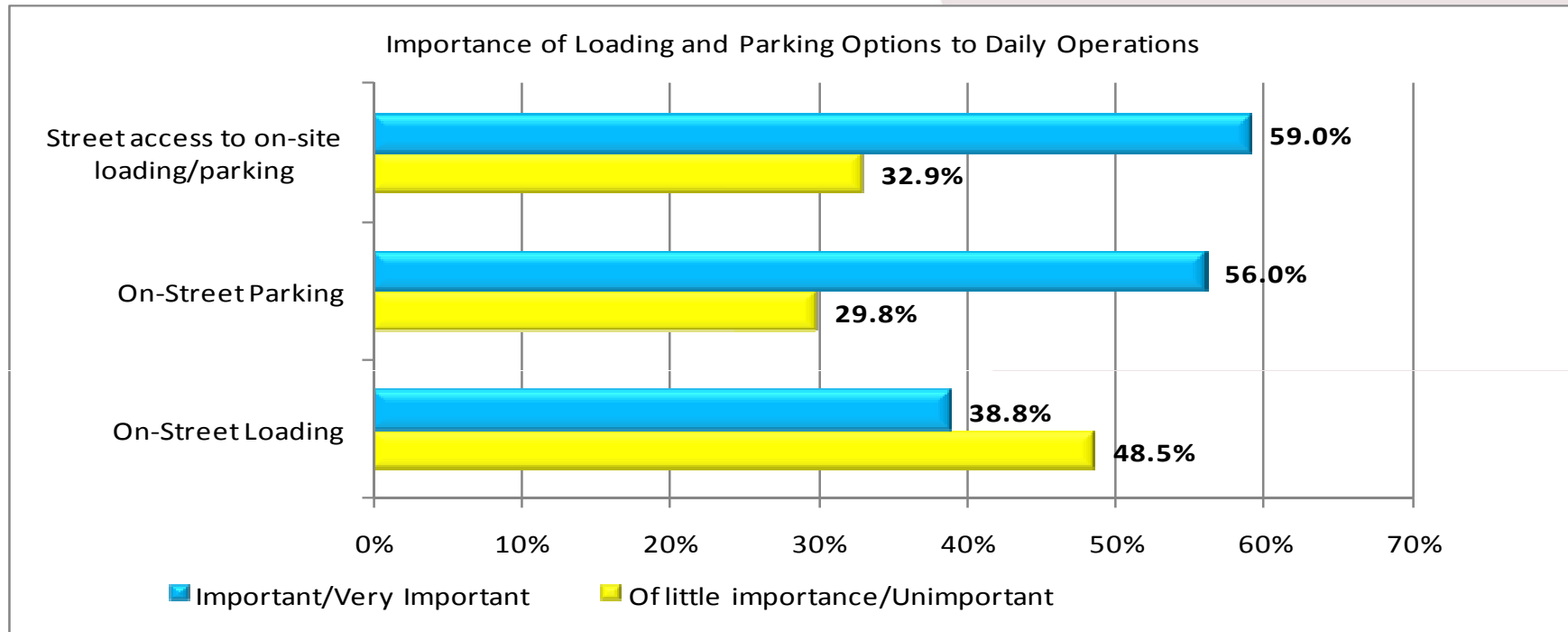
## Perception of Top Reasons Customers Choose their Business

Reason	Downtown	Midtown	Uptown	TOTAL
<b>To seek specific products/services offered by this business</b>	73.4%	82.0%	77.3%	<b>75.7%</b>
<b>Easy access by motor vehicle</b>	10.2%	39.7%	40.3%	<b>21.8%</b>
<b>Work in neighbourhood</b>	23.6%	9.5%	10.5%	<b>18.3%</b>
<b>Vibrant area</b>	18.8%	9.5%	12.3%	<b>15.8%</b>
<b>Availability of on site customer parking</b>	6.2%	17.3%	31.6%	<b>13.5%</b>
Accessibility by public transit	13.5%	4.8%	9.9%	<b>11.2%</b>
Live nearby	12.8%	2.7%	8.8%	<b>10.1%</b>
Tourist attraction	13.7%	3.5%	1.0%	<b>9.2%</b>
Availability of street parking directly in front	6.0%	12.5%	8.3%	<b>7.7%</b>
Other	7.0%	4.3%	3.2%	<b>5.7%</b>
Streetscape of the area	6.7%	0.7%	0.7%	<b>4.4%</b>
Don't know	3.3%	4.7%	4.2%	<b>3.7%</b>
Property features related to shipping/receiving	0.5%	4.5%	4.5%	<b>2.1%</b>

Source: Business Survey, n=495. Note: percentages sum to greater than 100% due to multiple responses.

# Findings – Business/Property Owners

## Importance of Loading/Parking to Daily Operations

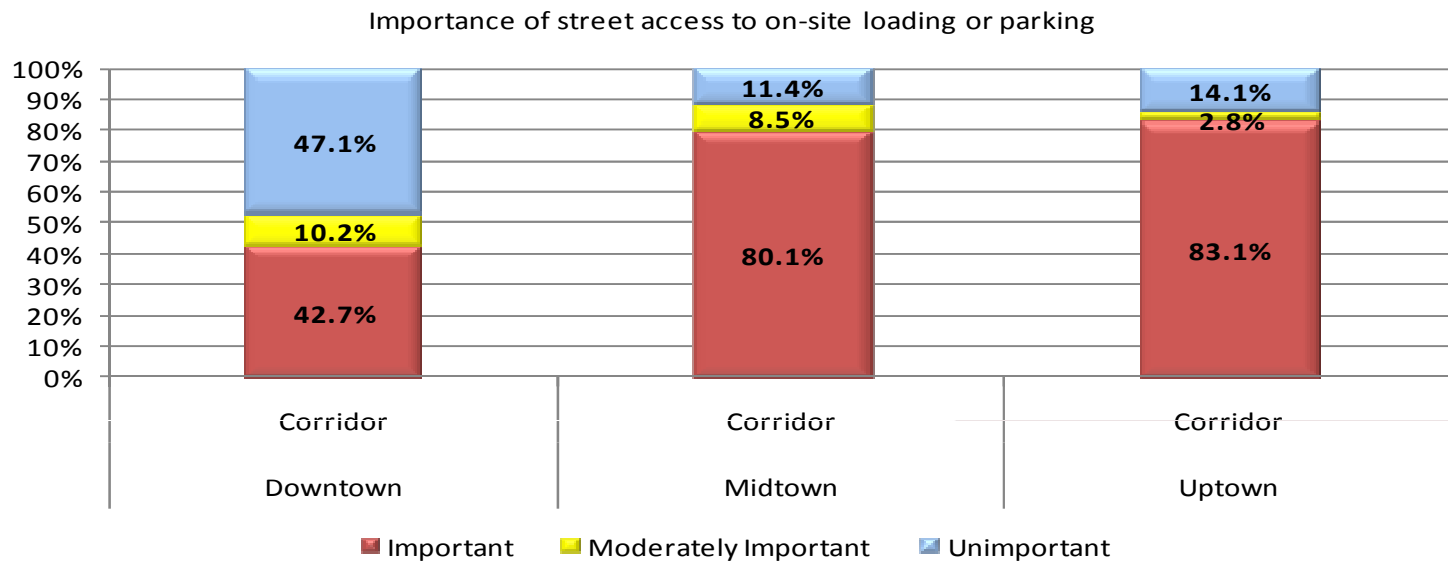


Source: Business Survey, n=467-473

- Street access, on-street parking important for more than half of businesses/property owners
- On-street loading important for 39%

# Findings – Business/Property Owners

## Street Access – Corridor Only

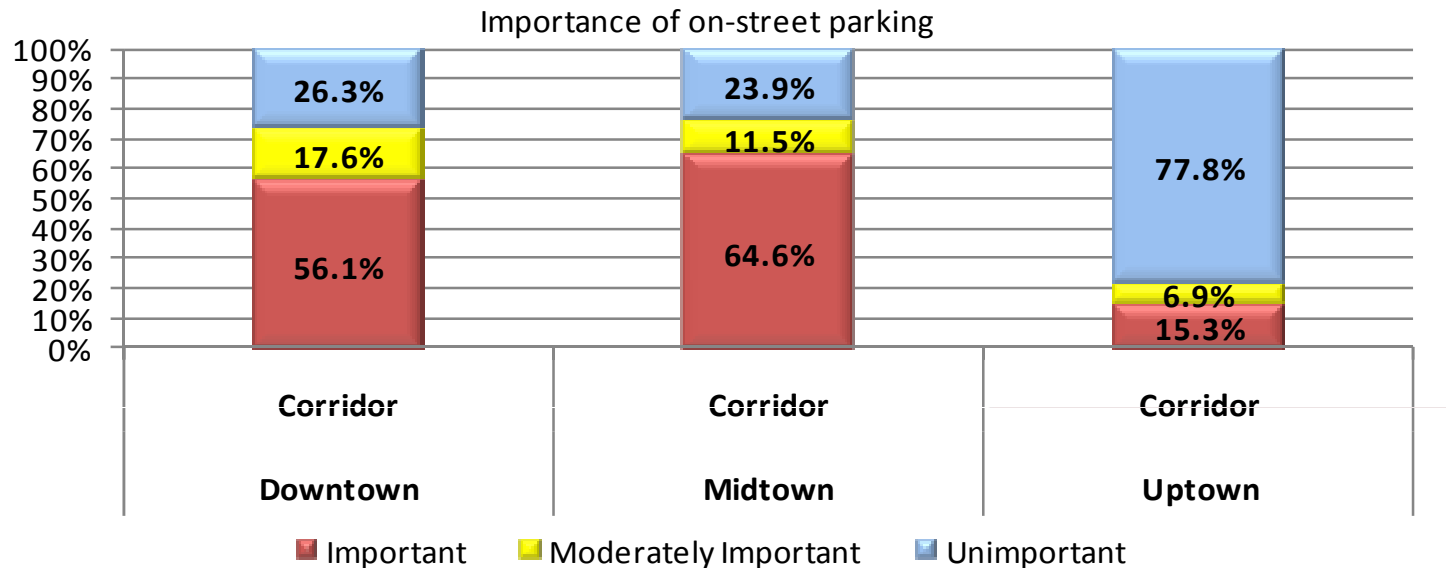


### Looking at corridor street businesses only:

- Access to the business property from the street for on-site loading/parking important or very important 80%-83% of Midtown and Uptown corridor businesses' daily operations
- Street access important to 43% of Downtown corridor businesses' daily operations

# Findings – Business/Property Owners

## On-Street Parking – Corridor Only

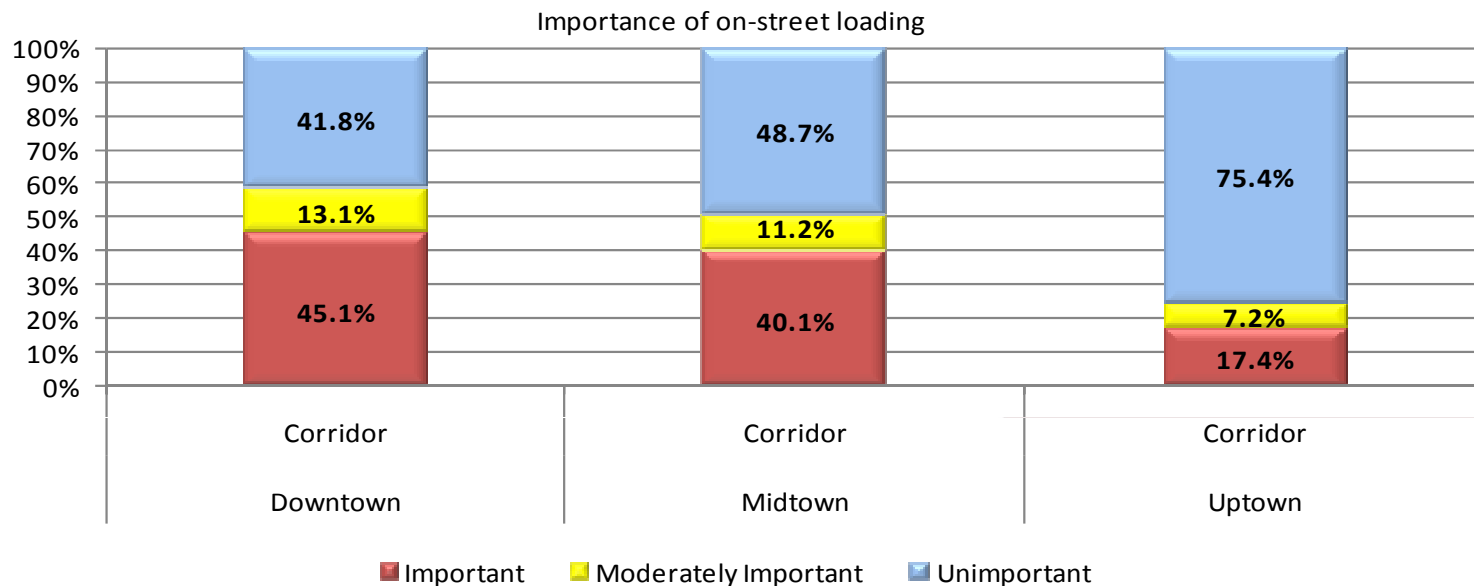


### Looking at corridor street businesses only:

- On-street parking important to 56%, 65% of Downtown, Midtown corridor businesses
- On-street parking important to only 15% of Uptown corridor businesses
- Overall, 79% reported parking options other than on-street available to customers:
  - Downtown: 82% cited nearby pay parking lots, 46% cited parking on side streets
  - Midtown: on-site parking with access from side street (48%) or with access from main street (47%),
  - Uptown: on-site parking with access from side street (73%) or with access from main street (61%)

# Findings – Business/Property Owners

## On-Street Loading – Corridor Only



### Looking at corridor streets only:

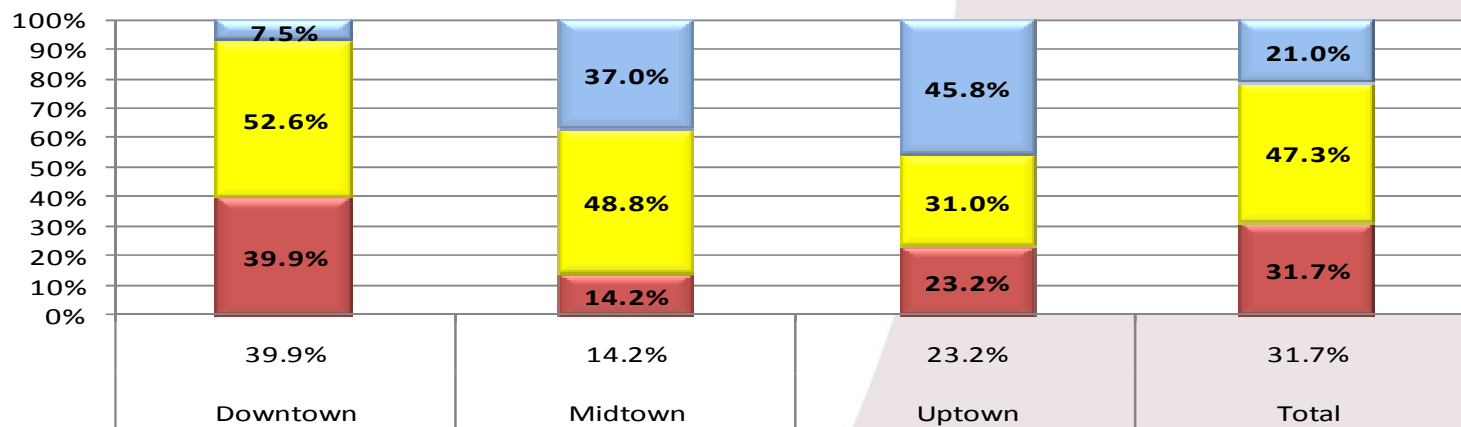
- On-street loading least important for Uptown corridor streets
- On-street loading important for 40% to 45% on Midtown or Downtown corridor
- Alternatives, such as on-site loading (from a main or side street) or loading from a side street available to 45% of Downtown corridor businesses, 51% of Midtown corridor businesses, and 82% of Uptown corridor businesses

# Findings – Business/Property Owners

## Effect of Rapid Transit on Customer Volume

- 79% of businesses believe that a rapid transit system would either increase or not change the volume of customers
- A small minority (8%) in the downtown predict it would have a negative effect on customer volume, with somewhat more in the midtown (37%) and uptown (46%) with this opinion

What effect would a rapid transit system on this corridor have on the volume of customers visiting your business?



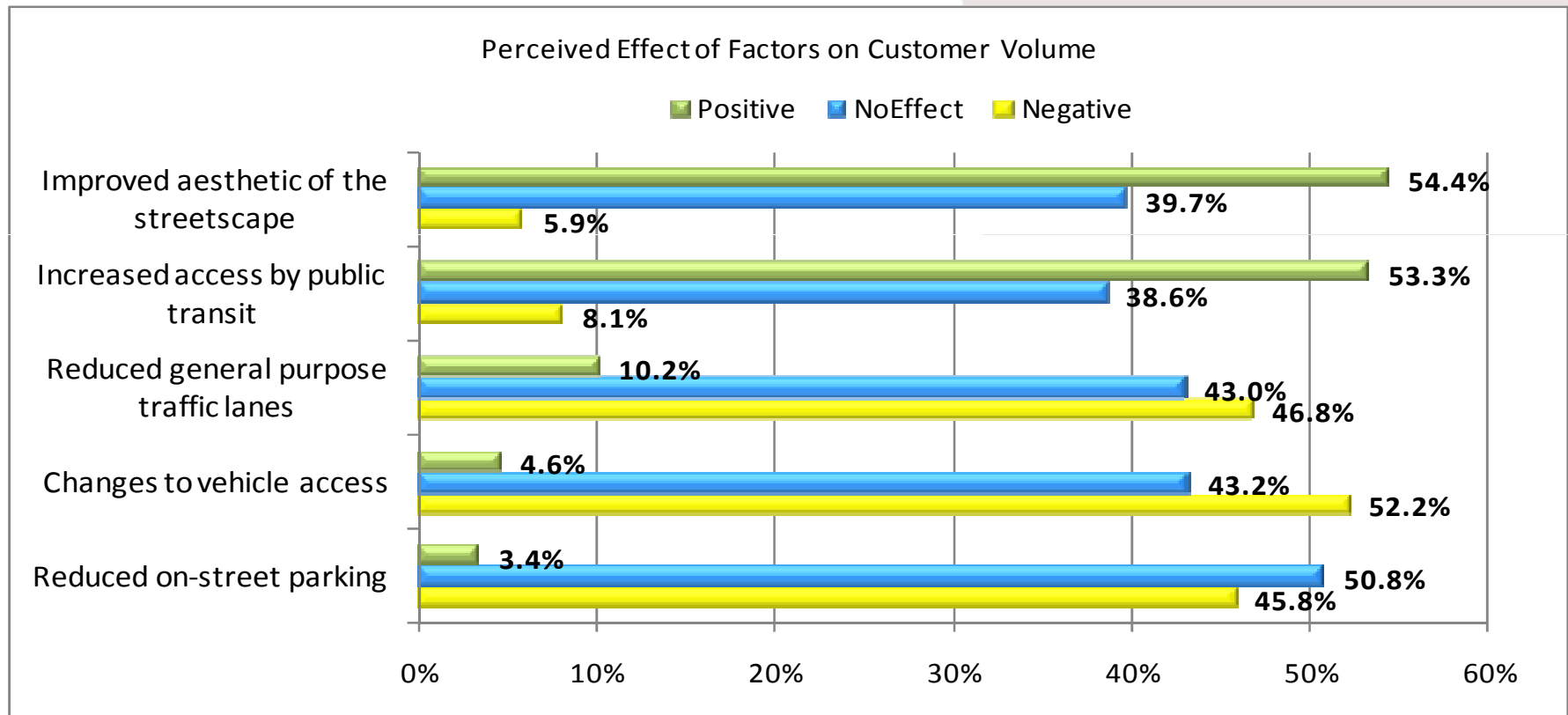
Source: Business Survey, n=442

■ Increase Volume   ■ No effect on Volume   ■ Decrease Volume

# Findings – Business/Property Owners

## Perceived effects of RT development on business

- More positive: improved streetscape, improved access to public transit
- More negative: reduced traffic lanes, changes to street access, reduced on-street parking



Source: Business Survey, n=442-500, scale of 1 to 5, with 1 very negative, 3 no effect, 5 very positive.

## Perceived effects of RT development on businesses

### Downtown

- Majority predict either no effect (53%) or positive effect (14%) from **reduced general purpose traffic lanes**; one-third believe it will have a negative effect
- Divided on effect of possible **changes to vehicle access** (52% no effect, 42% negative), and on effect of **reduced on-street parking** (52% negative effect, 44% no effect)
- Most likely to see **increased access to public transit** as positive (64%)
- Most positive about effects of **improved streetscape** (63%) and **widened sidewalks** (42%)

## Perceived effects of RT development on businesses

### Midtown

- More likely to perceive negative effects from **reduced general purpose traffic lanes** (65%) or from changes to vehicle access (65%)
- Divided on the effect of **reduced on-street parking** (50% no effect, 49% negative)
- 36% predict positive effect from **increased access to public transit**, 53% no effect
- Mixed opinion as to whether **improved streetscape aesthetics** will have positive (43%) or no effect (43%)
- Most believe **widened sidewalks** will have no effect (64%), while 24% positive

## Perceived effects of RT development on businesses

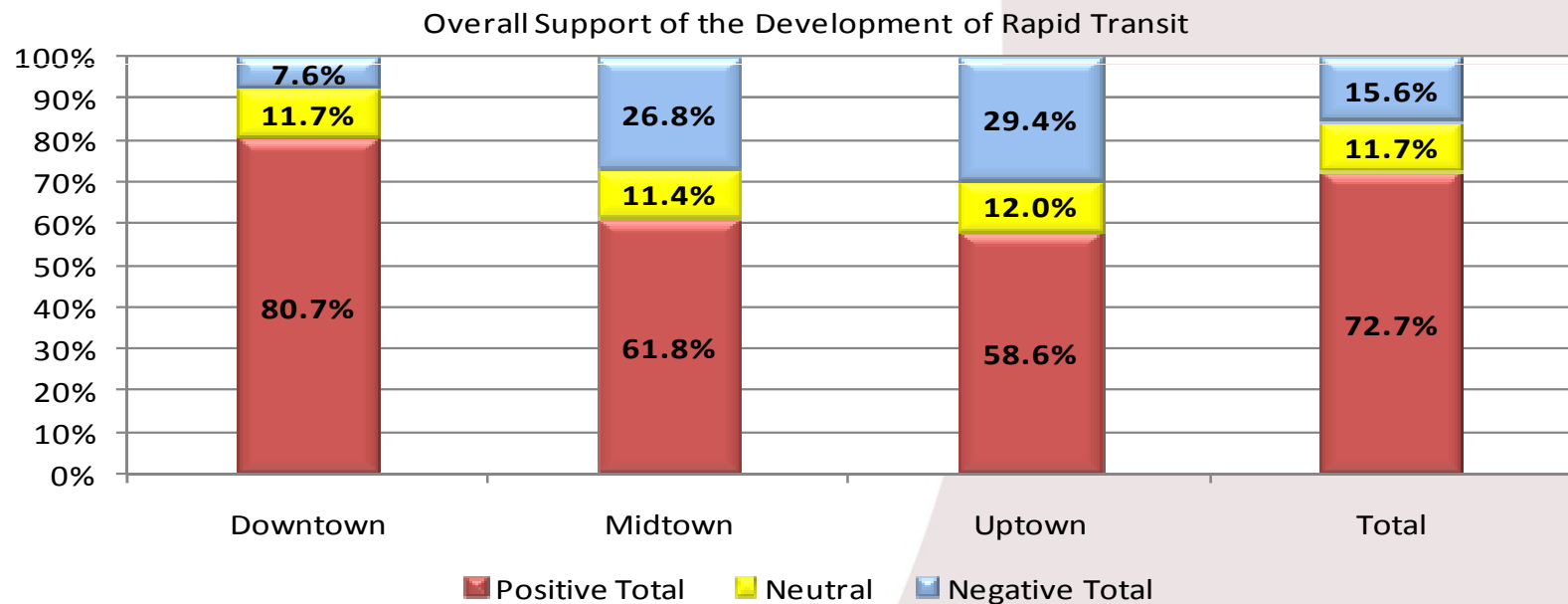
### Uptown

- Most likely to perceive negative effects from ***reduced general purpose traffic lanes*** (72%), or from ***changes to vehicle access*** (72%)
- Most likely (70%) to perceive no effect from ***reduced on-street parking***
- 37% predict positive effect from ***increased access to public transit***, 49% no effect
- Most likely to predict no effects for ***improved streetscape*** or ***widened sidewalks***

# Findings – Business/Property Owners

## Overall Support

- Almost three-quarters of businesses/property owners are supportive of the development of rapid transit
- Support is greatest among downtown respondents (81%), followed by midtown (62%) and uptown (59%)



Source: Business and Property Owner Survey, n=503

# Findings

## Customer Survey

- Profile of customers
- Factors influencing decision to visit business
- Effect of development on likelihood of visits
- Support for rapid transit

### Profile of Customer Survey Respondents

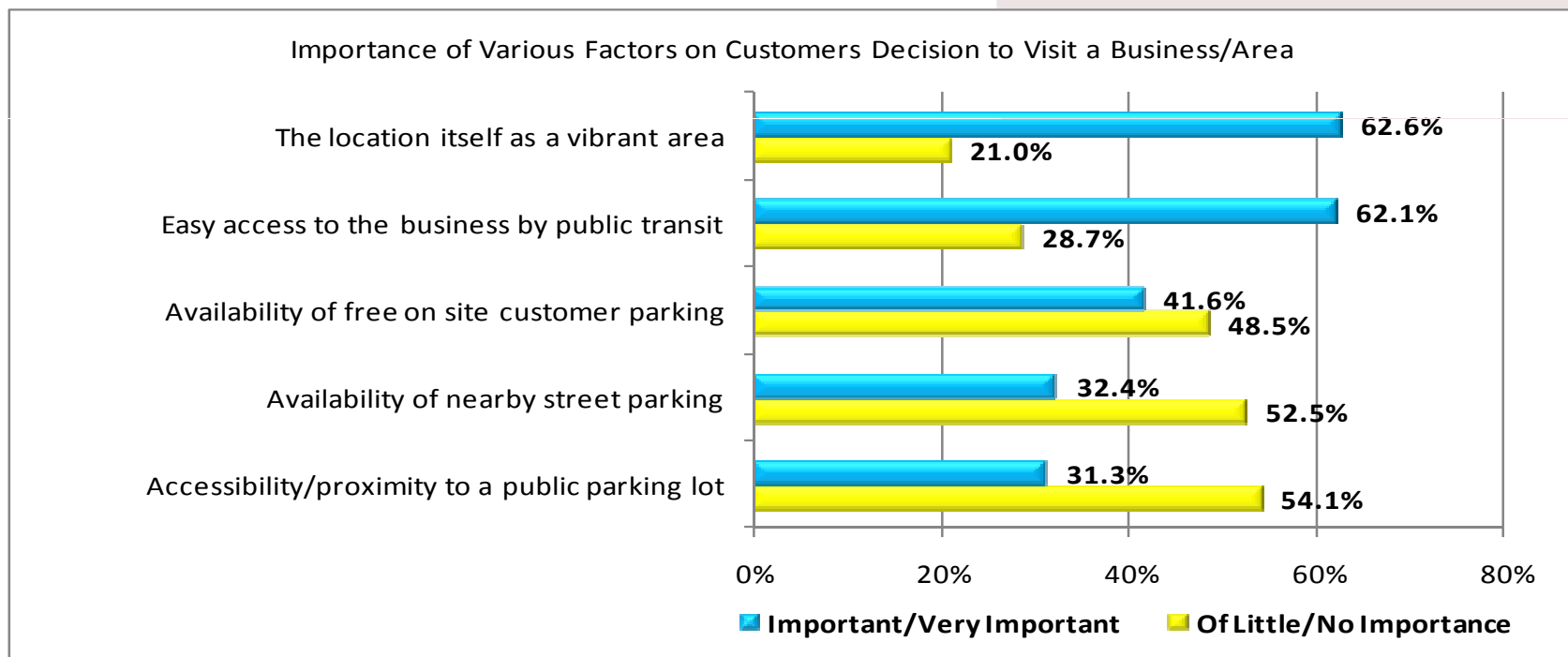
- 54% employed, 24% retired, 8% students
- Spread across age ranges, almost half >50
- Origin prior to visiting business:
  - 41% Victoria, 26% Saanich, 7% Langford/Metchosin/Sooke
- Mode of travel to get to the area or business:
  - 37% drove, 27% public transit, 24% walked, 7% bicycle
- Of drivers, half used parking lot associated with the business

### Profile of Customer Survey Respondents

- 62% of visits were planned (38% impulse)
- 54% visit the business specifically for the products/services (15% cite accessibility by foot, 13% close to work, 12% close to home)
- More than half of customers visit the business at least once per week (26% daily, 33% one-three times per week)
- Times most likely to visit business:  
mid-morning, 9:30 AM – 11:00 AM, 21%;  
mid-afternoon, 1:30 PM – 3:30 PM, 26%

## Customer Decision to Visit Business/Area

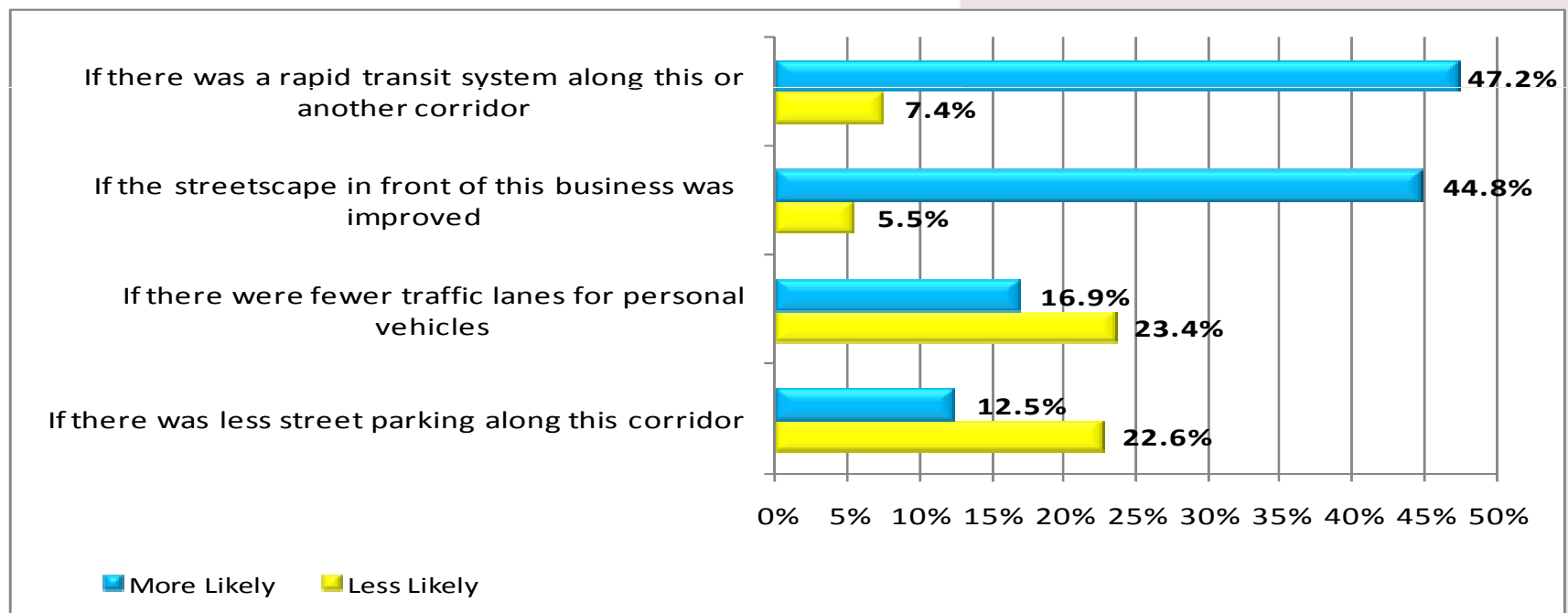
- ***Vibrant location*** and ***accessibility by public transit*** were the most important factors for customers
- Availability of parking options of lesser importance



Source: Customer Survey, n=434-438

## Impact of Factors on Likelihood of Visiting

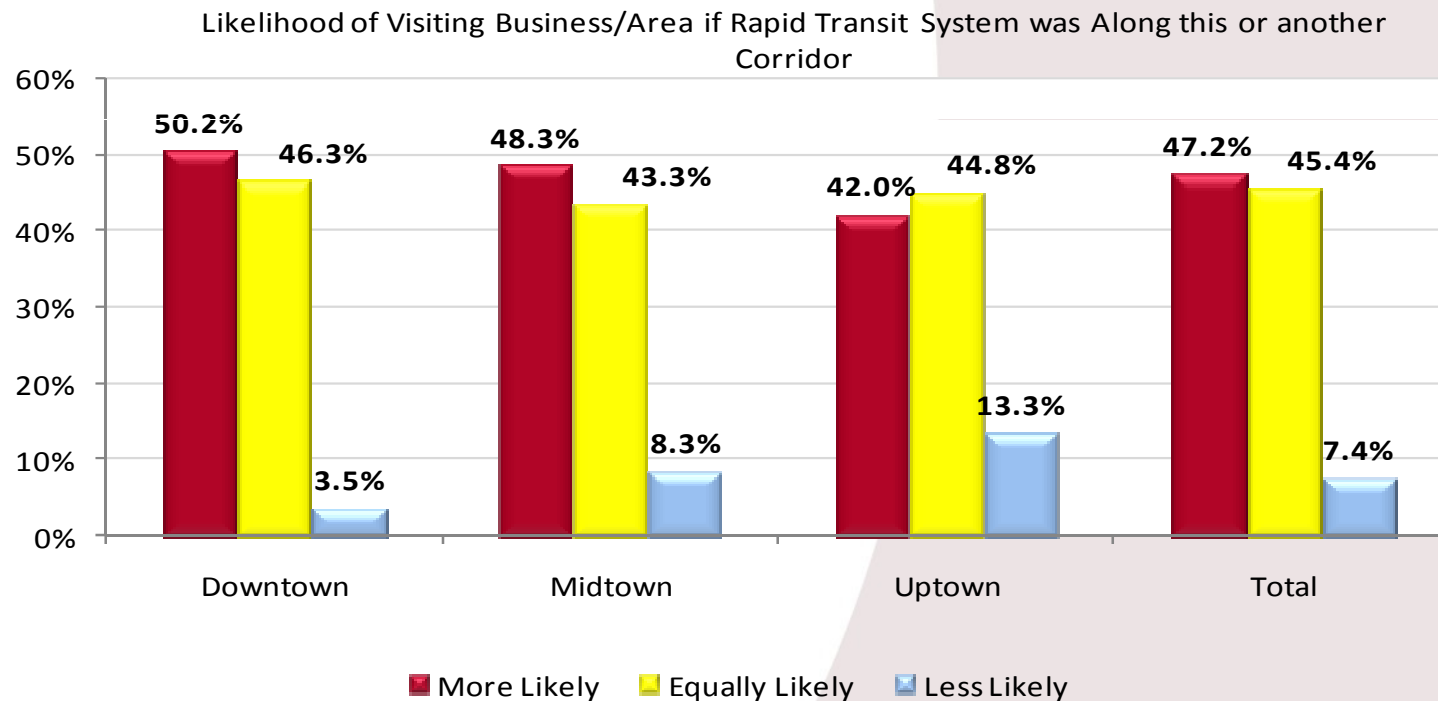
- **Rapid transit along the corridor** and **improved streetscape** are most likely to increase customer visits
- **Fewer traffic lanes** and **less street parking** were more likely to decrease customer visits than increase visits



## Findings – Customers

### If Rapid Transit was Along this or Another Corridor...

- 93% of customers more or equally likely to visit the area, with downtown customers being most likely

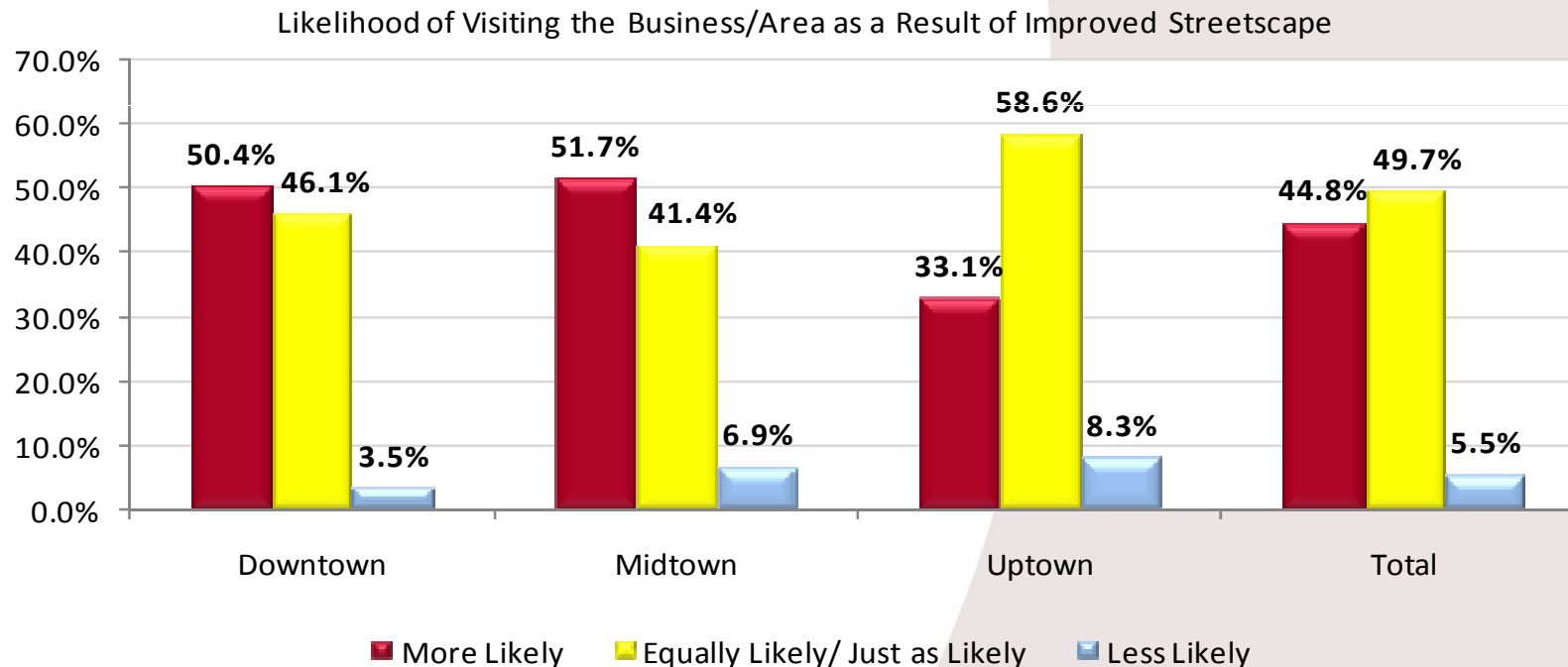


Source: Customer Survey, n=432

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## Improved Streetscape...

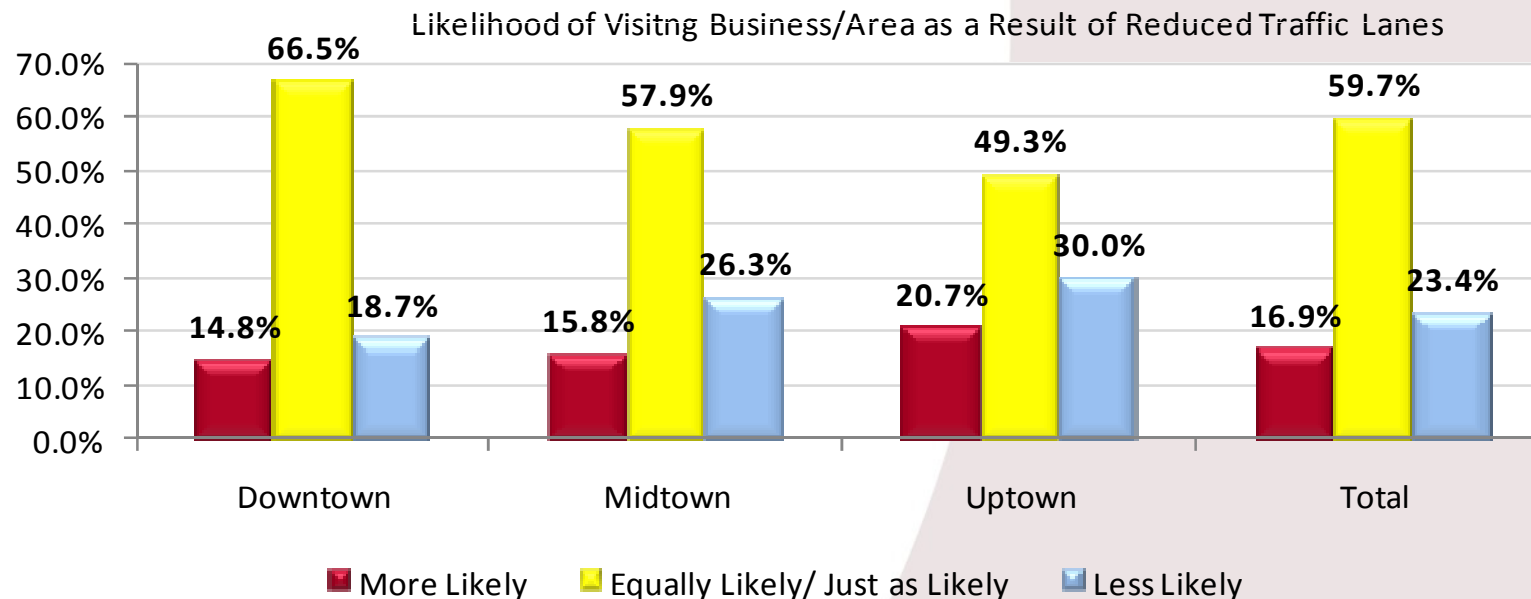
- Vast majority of downtown customers predicted either no effect (50%) or a positive effect (46%)
- Least positive effect in uptown, but still 33% more likely



Source: Customer Survey, n=433

## Reduced General Purpose Traffic Lanes...

- No impact on 60% of respondents' likelihood of visiting; but a greater negative (23%) than positive (17%) impact
- A greater negative impact is perceived as one moves from downtown to uptown

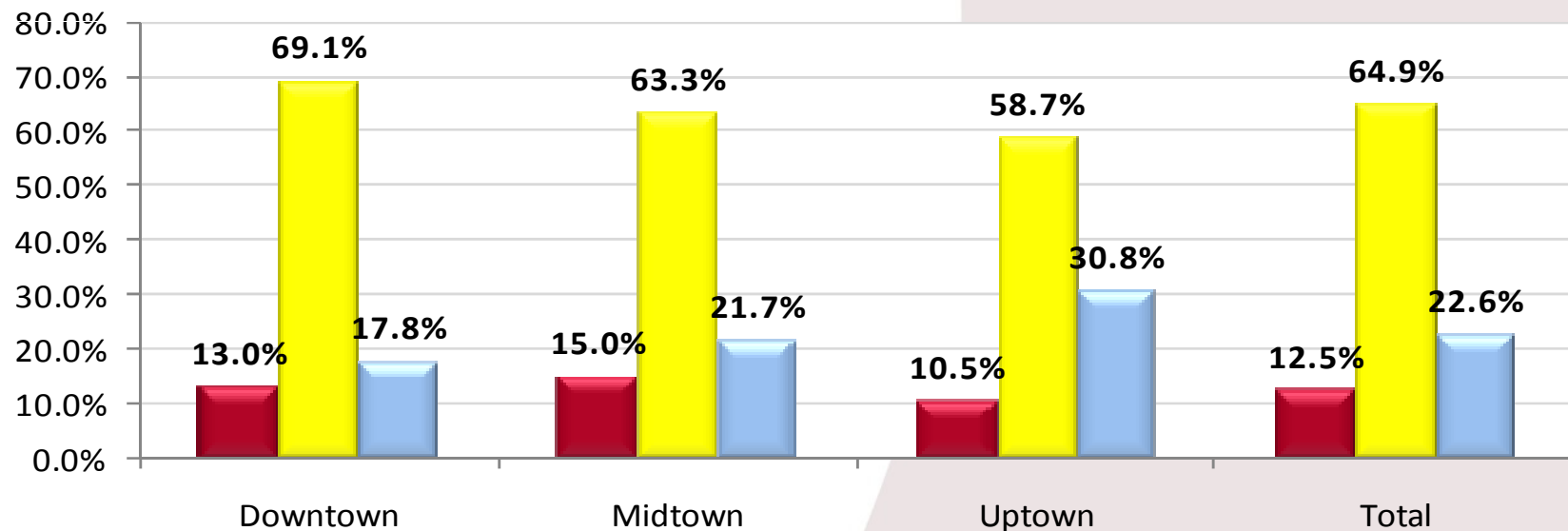


Source: Customer Survey, n=427

## If Less Street Parking...

- 65% would not be affected; 23% less likely to visit whereas 13% more likely to visit
- Almost 70% of downtown customers equally likely

If there was less street parking along this corridor?



Source: Customer Survey, n=433

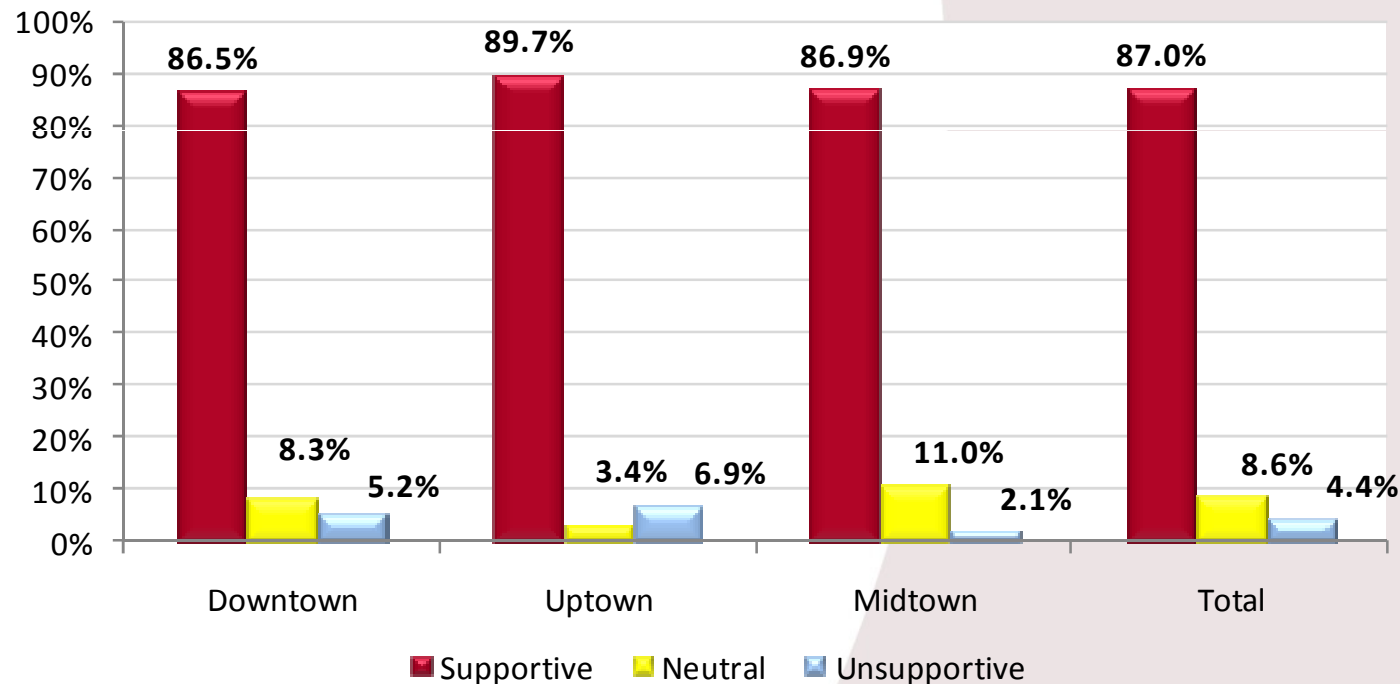
■ More Likely   
 ■ Equally Likely/ Just as Likely   
 ■ Less Likely

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## Overall Support

- The great majority (87%) of customers are supportive or very supportive of a rapid transit system

Overall, how supportive are you of the development of rapid transit between the WestShore communities and downtown?



Source: Customer Survey, n=432

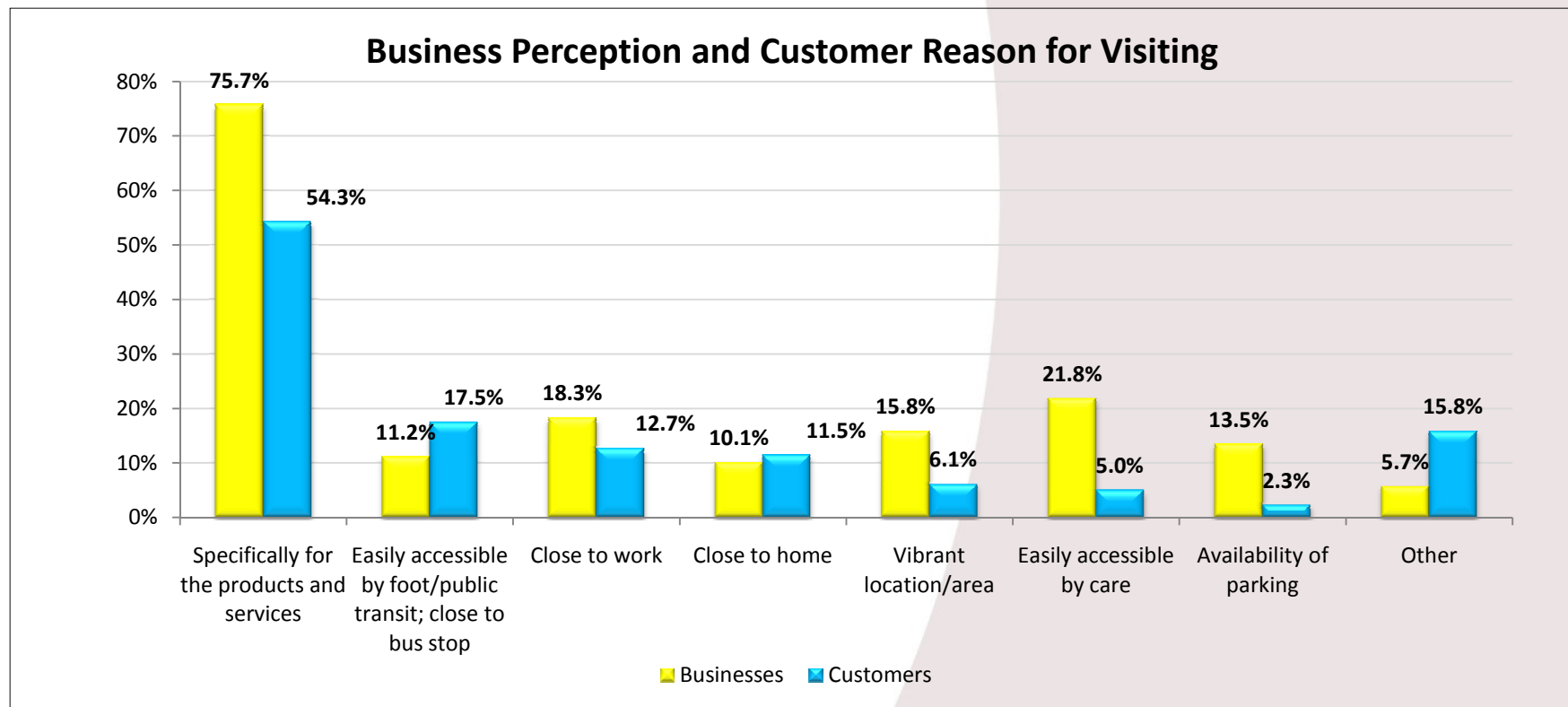
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# Findings

## Comparing Business and Customer Opinions

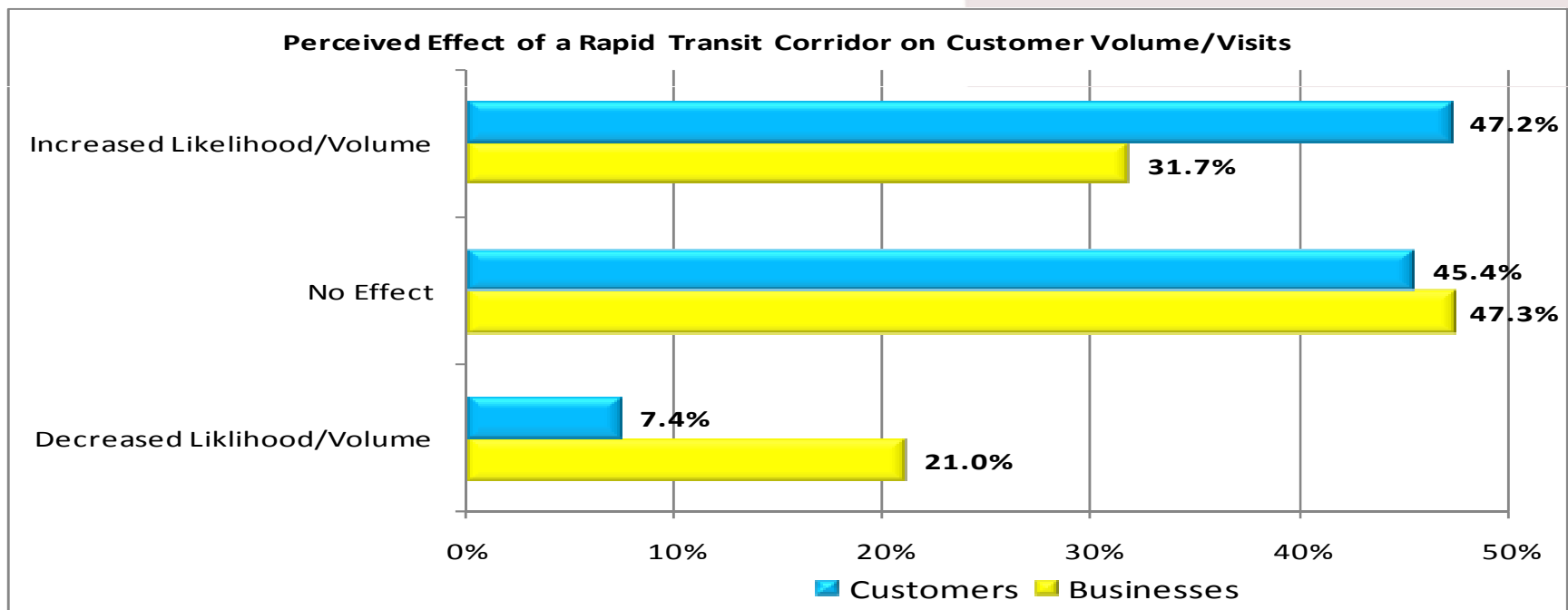
## Reason for Visiting

- Businesses place more emphasis on accessibility by car and availability of parking than do customers



## Impact of Rapid Transit

- Businesses/property owners are more likely than customers to predict a decrease in customer volume
- Customers are more likely to predict an increased likelihood of visiting

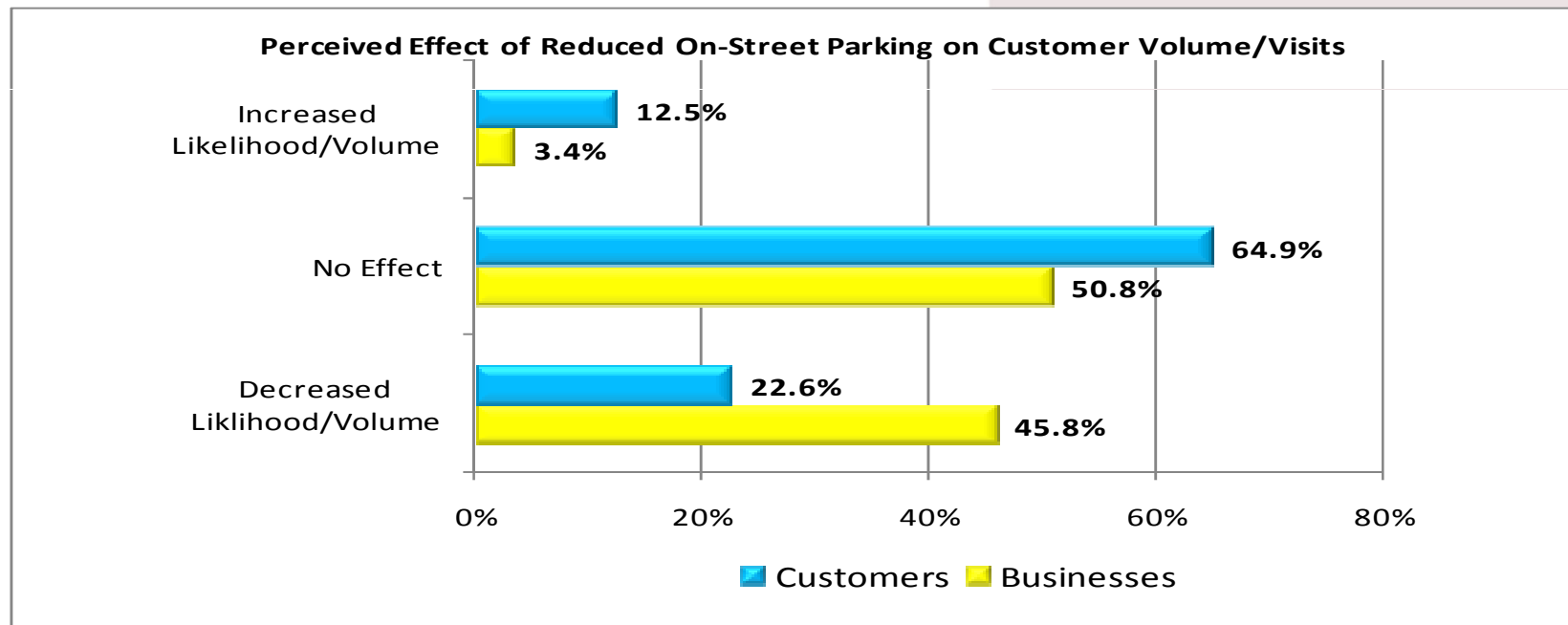


Source: Business Survey, n=442 and Customer Survey, n=432

## Findings – Comparison

### Impact of Reduced On-Street Parking

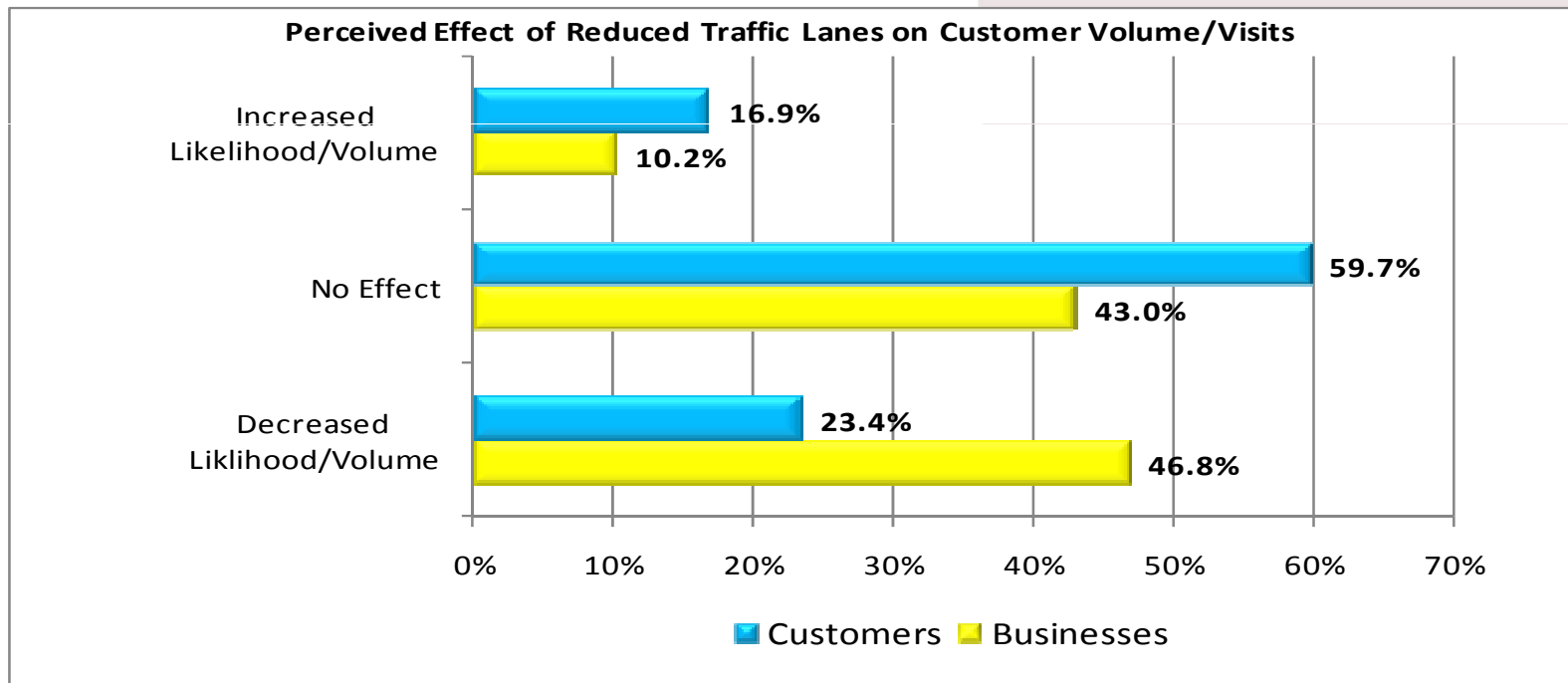
- The majority of customers (65%) and half of businesses (51%) believe reduced on-street parking would have no effect on them
- Businesses perceive a greater negative effect than customers



Source: Business Survey, n=496 and Customer Survey, n=433

## Impact of Reduced Traffic Lanes

- Businesses more likely than customers to predict that reduced traffic lanes would negatively affect customer visits

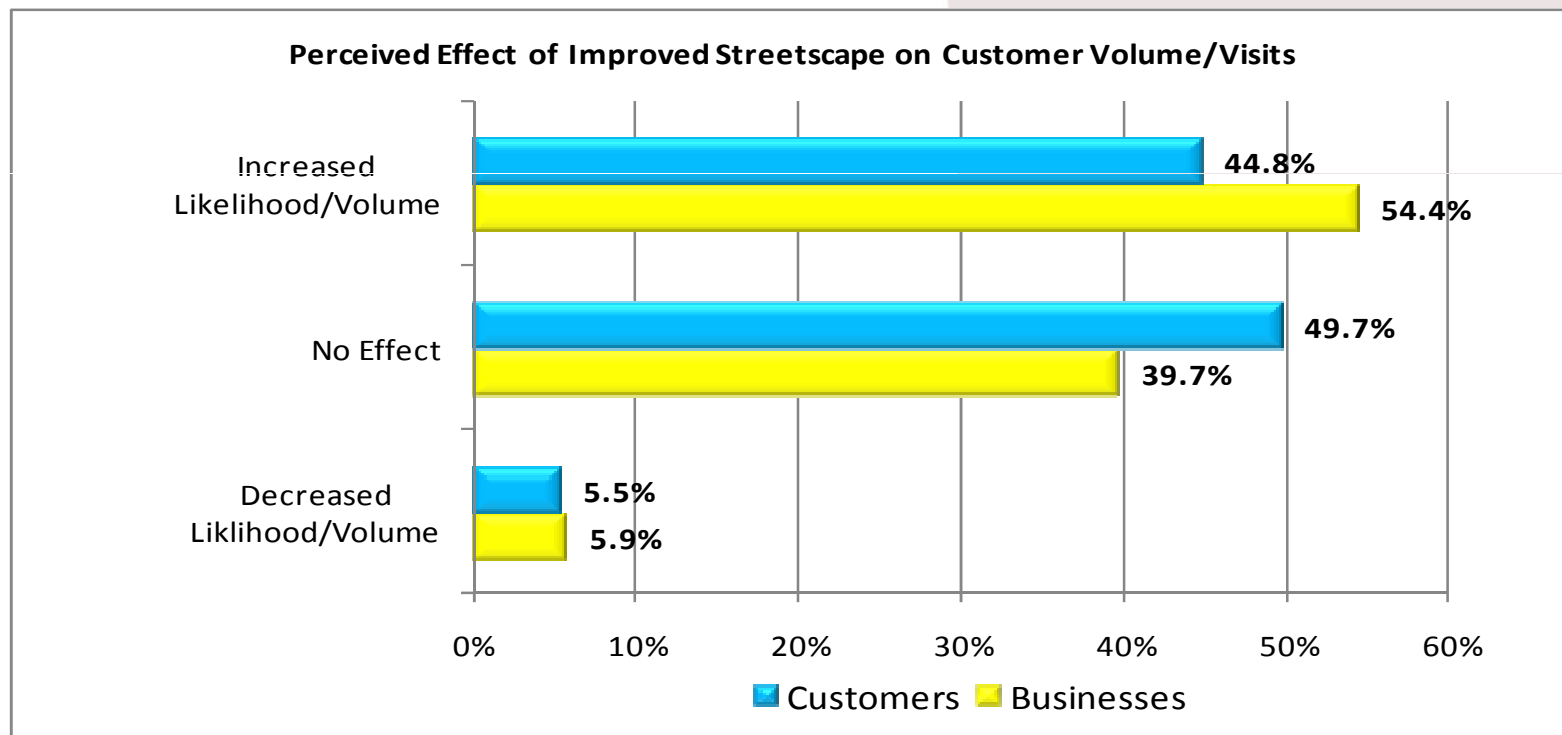


Source: Business Survey, n=485 and Customer Survey, n=427

# Findings – Comparison

## Impact of Improved Streetscape

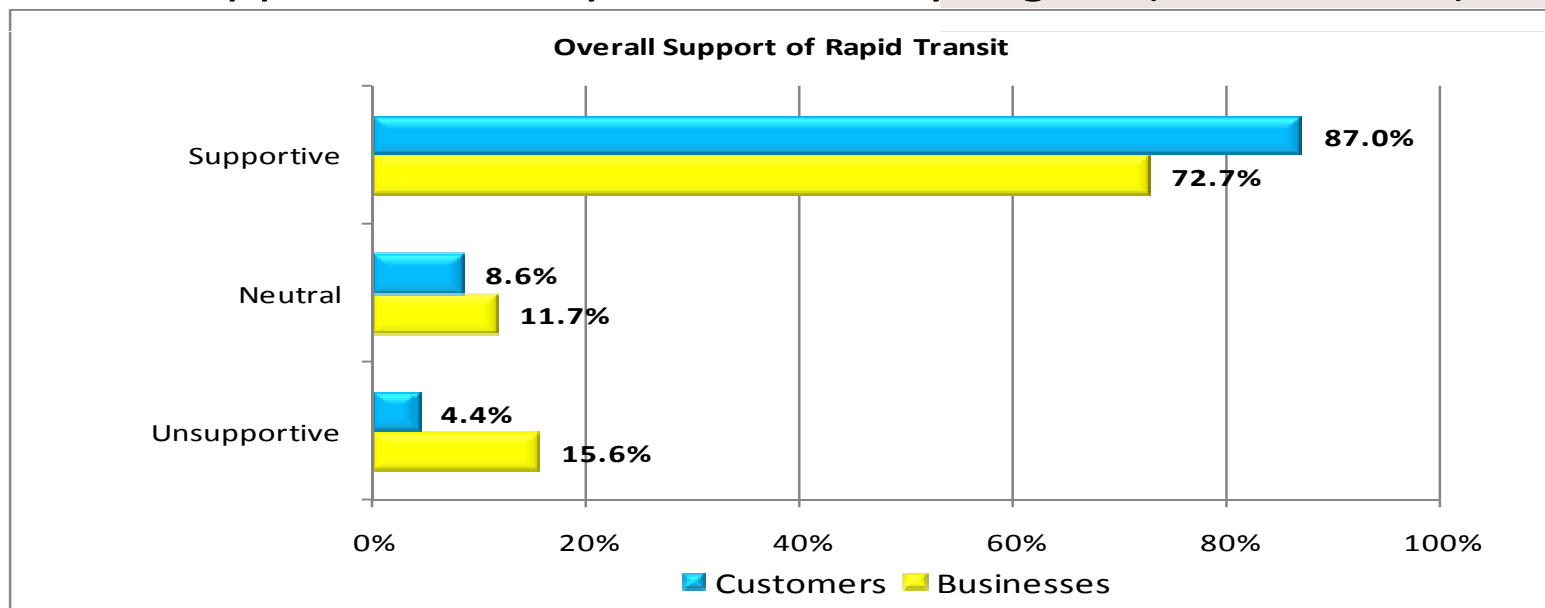
- Businesses a bit more likely than customers to predict a positive effect or increased likelihood of visiting



Source: Business Survey, n=490 and Customer Survey, n=433

## Overall Support of Rapid Transit

- The majority of both respondent groups are either supportive or very supportive (73% of businesses and 87% of customers)
- Businesses' support highest in downtown (81%), followed by midtown (62%), and uptown (59%).
- Customer support relatively consistent by region (87% to 90%)



Source: Business Survey, n=503 and Customer Survey, n=432

# Thank You

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# Questions?