ROI of BIAs

Return on Investment of BIAs Report

April 2017

ROI of BIAs OBIAA Ontario tabia Toronto Association of Business Improvement Areas BRAND CLARITY CoBALT CONNECTS. the connecting element for creative communities FOTENN

ACKNOWLEDGMENTS

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The Province of Ontario

The City of Toronto

The Toronto Entertainment District BIA

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With a current database of more than 308 BIAs in Ontario alone, OBIAA began the Return ON Investment of BIAs Project in March of 2016 to increase understanding of the impact of BIAs. Funded through the Ministry of Municipal Affairs and working with the Toronto Association of BIAs (TABIA), OBIAA's primary goal was to identify a set of common indicators for BIAs across the province which reflect the BIAs role in local economies and community development. These indicators will act as a benchmark for BIAs across the province and help to establish the impact BIAs are having in communities of all sizes across Ontario.

The study has four primary goals:

1. Establish a set of common indicators for BIAs across Ontario.
2. Create a pool of Tools and Metrics for BIAs to share their impact and analyze trends.
3. Understand what is happening on the ground in our downtowns and main streets and the successes and challenges currently faced by BIAs.
4. Outline existing gaps in the data base and provide recommendations on how to go about filling them.

The project was conducted in four phases:

Background research: at the outset, the project team undertook background research project to learn and show how various municipalities, BIAs and other jurisdictions around the globe are assessing value and contribution and some of the data currently available. The findings resulted in 13 recommendations to assist the ROI of BIAs project team in the development of a comprehensive set of indicators and build an understanding of data.

Establishing the Indicators: Using the information gathered through the primary and secondary research, evaluation of the collective indicators was completed by the project team and Advisory Committee with recurring feedback loops to the membership to arrive at the final list.

Establishing the Monitoring Tools: Once the indicators were determined, this phase consisted of understanding the data sources available among BIAs, municipalities and governments and arriving at initial data sets for the 30 indicators identified during the consultation process.

Knowledge Sharing: The indicators, data analysis, data gaps and tools developed through this study will continue to be shared with government partners and the membership to create a common understanding around the importance of data to highlight the role BIAs play in building resilient commercial districts.

Through each phase, the project team underwent an engagement process that consisted of a series of interviews with key BIA leaders, municipal leaders, Ministry stakeholders to ascertain priorities and challenges in the daily function of BIA organizations, and understand the data measurements to help BIAs share their story. The consultation program included two multi session webinars with BIAs across Ontario and series of 10 surveys issued to BIA leaders and BIA members. Six Advisory Committee meetings were also held to discuss findings and determine key indicators and directions.

Based on this consultation process, an initial list of over 200 potential indicators under eight possible themes was refined to create a comprehensive list of 30 indicators under four key goals. The list of 30 indicators were then further prioritized by the project team, Advisory Committee and membership based on a poll of overall interest in the metric over the long term down to seven key indicators.

STREET APPEAL

Physical

1. Streetscape and façade investment
2. Placemaking
3. Visitor Experience

4. Actual event attendance
5. Conversion rate
6. Average Dwell Time within the BIA
7. Quality of Life (including livability measures and perceptions)

ECONOMIC DEVELOPMENT

1. Employment
2. Building permits
3. New business openings
4. Assessed property values
5. Gross District Product
6. Business mix
7. Anchors

BIA Zone of Influence: Assessed value of surrounding area and Housing prices in surrounding area

SUPPORTING SMALL BUSINESS

Business Impact

1. Retail sales
2. Business hours
3. Visitor satisfaction
4. Gross leasable area
5. Business Resiliency + Business turnover
6. Business longevity + Vacancy rates
7. Customer Draw Potential: Number of independent businesses + Number of chains

Visitation, Movement and Marketing

8. Things to do in the BIA/Region
9. Parking utilization
10. Pedestrian counts
11. Marketing Effectiveness: Visitor recall of BIA marketing and Visitor reviews and testimonials

COMMUNITY BUILDING

Internal Community Building

1. Strategic plan achievement

External Community Building

2. Municipal Capacity Building: Amount of collaboration with municipality and BIA submissions and presentations to Council
3. Local Capacity Building: Engagement with neighbourhood organizations and number of non-BIA events held in the BIA
4. Safe environment

KEY SEVEN INDICATORS

1. Sales – actual numbers
2. Gross District Product (sales and employment by square acreage)
3. Employment
4. Business mix – anchors, critical mass, plan alignment
5. Business resiliency – turnover, vacancy and longevity
6. Money leveraged for streetscape
7. Visitor satisfaction

KEY OBSERVATIONS

Street Appeal

- **Streetscape and Façade Investment:** 55% of reporting BIAs had members leveraging façade programs, which generated an average 2.5:1 private sector to municipality investment ratio with an average of $0.17 per capita invested.
- **Placemaking:**
  - BIAs report a median spend of $32,500 annually dedicated to beautification.
  - 75% have a significant stock of properties that are either heritage-designated or of heritage interest.

- All BIAs reported having multiple transit stops.
- A significant cluster of cultural facilities tends to land within 500m of a BIA.
- BIAs have an average of 4 schools within 500m.
- Significant affordable housing stock is within 500m of a BIA.
- An average of 10 churches fall within 500m of BIA.

Economic Development

- **Employment:**
  - The project team found both BIAs that can attract employees to an area increasing the daytime population by over 800% and BIAs that account for a significant proportion of the of the jobs in a community (ranging from 0.2:1 to 0.9:1).
  - The greatest average daytime employment shift (the increase from residential population to daytime employment population) occurs in BIAs in municipalities with a population of 100,000 to 500,000, where the average shift is a 177% increase.
- **Building Permits:** From 2011 to 2016, the value of building permits in reporting communities increased by a value of 163% (commercial) and 128% (residential), while the number of permits remained relatively stable.
- **New Business Openings:** An average of 6% of their membership representing new businesses. The strongest performers in new business are BIAs within communities between 500,000 to 1M population, who are hosting on average 17 new businesses per year.
- **Assessed Property Value:** Average: Assessed value was $216,428,280. In communities with a population between 100,000 to 500,000, this value was 25% higher than the average, whereas in communities between 500,000 and 1M in population, the value was 125% below average.
- **Business Mix:**
  - 1% of the business mix in BIAs, with communities between 500,000 to 1M (5%) and 25,000 to 100,000 (6%) having the greatest representation.
  - Anchors: BIAs are primarily comprised of five NAICS codes: Retail Trade (25%), Other Services (19%), Accommodation and Food (18%), Health Care & Social Services (9%) and Professional, Scientific and Technical Services (7%). All other NAICS fall under 3%, with the vast majority having none.
- BIA Zone of Influence: the sale price of a single-family home or condominium within 500m of a BIA rose on average 46% between 2011 and 2016.

Support Local Business

- **Vacancy:** On average, there were 11.7 vacancies per BIA on an annual basis. This figure is significantly higher in communities with a population of 100,000 – 500,000 population, having an average of 21.6 vacancies per year.
- **Number of chains:** On average, chains make up 7% of BIA membership in Ontario, with cities 100,000 to 500,000 in population reaching as high as 12%.
- **Things to do within the area of influence of a BIA:** On average a BIA has 10 places of worship, 12 public parks, and two cultural facilities within 500m of the BIA -- making them prime civic spaces for public engagement.

Community Building

- Strategic Plan Achievement: 40% of BIAs review their strategic plan annually and that 76% review their plan within 1-5 years.
- Municipal Capacity Building:
  - 84% of BIA staff rate their level of collaboration with their municipal partners between 7-10 (10 being excellent).
  - While 97% report having a relationship with municipal staff, they only rate the effectiveness of these relationships at 81%.
- Local Capacity Building:
  - BIAs produce an estimated total of 1200 events

each year, and another 1300 produced by other community organizations land within the BIA.

- Safe Environment:
  - Of the BIAs surveyed, 60% have at least one policing centre within 500m
  - 30% of crime within a BIA was theft and shoplifting, 24% was alcohol or quality of life related, and 14% was considered violent crime.

NEXT STEPS: COLLECTING DATA

Building out the Indicators: While this study starts to create that toolkit, more work is needed in the future. This project has identified a number of data collection tools to help the membership and municipalities provide indicator data. Some of these tools already exist, some need to be augmented to provide information to address certain indicators and some are brand new. A handbook for BIAs on these tools and their relationship to each indicator should be developed to equip BIAs with easy to use collection measures and help outline the emerging and critical role of data in their daily practice.

Funding Critical Data: In order for BIAs to track some of the critical metrics which help define their return on investment, funding support is needed. This project has identified a select group of indicators which are attainable but at a cost.

Building a Database: In order for data to continue to be gathered and easily accessed, a central data portal should be created. The data portal would provide substantial improvements to both data entry by the membership and municipalities, and data availability for all.

NEXT STEPS: BUILDING CAPACITY

For BIAs and Their Members: Each BIA should be recognized as unique and should not be forced into a one-size-fits-all approach. The intent here is to provide each BIA with the tools needed to share their story and their success without attempting to sterilize the unique nature of each business district.

For Associations: OBIAA and TABIA have an important role to play in leading BIA organizations into their next phase of growth. Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. OBIAA and TABIA are looking to better address these challenges and support the membership in their own professional development, but must engage both the province and local municipalities in these efforts to ensure success.

NEXT STEPS: BUILDING PARTNERSHIPS

Provincial: This report calls for continued multi-ministry partnership with OBIAA to support the foundation of data and metrics formulated through this initiative both on a broad basis and localized scale.

Municipal: Stronger municipal partnerships between their administration and their BIAs will undoubtedly improve access to data, reduce uncertainty about sharing information and build mutual trust.

Institutional: There is currently institutional capacity to both assemble, analyze and house the data for each indicator of this project. Direct alignment with a partner institution would engrain continued research on BIAs as part of the community fabric. OBIAA/ TABIA would like to work with a preferred institution to create a research hub for Small Business and Business Improvement Areas in the future.

Commercial: Private Sector partnerships offer BIAs an opportunity to leverage additional knowledge, market share and in some cases financial support to assist them in day to day function. While some strong partnerships with private sector firms exist on an individual BIA level, these could be further explored to see what opportunities are available on a broader scale. BIAs are in a unique position to foster these partnerships.

NEXT STEPS: SHARING KNOWLEDGE

Communications will play a vital role in the ongoing success of the project, from keeping members and stakeholders engaged and excited to providing the key mechanisms for encouraging collection and gathering of data. A long-range communications

plan is being currently developed to support this initiative as the future unfolds. Bilingualism and improving engagement will be key to successful communications and knowledge-sharing.

NEXT STEPS: DEMONSTRATING THE RETURN ON INVESTMENT

One of the primary goals of this study was to determine the return on investment of BIAs. The work completed to date provides a snapshot of their influence, as well as clarity around the indicators needed to share the wide variety of successes and challenges faced by BIAs across the province. In addition, this work also looks to provide a series of tools to both collect needed data and equip the membership to share what they have. Ideas around future tools for BIAs to use in sharing indicator metrics were developed, including:

Street Appeal

Asset Mapping

Benefit: Provides a visual tool for BIAs and municipalities to understand existing assets (both physical and social) within the BIA area. For example, a map that populates total number of street benches, lampposts, garbage cans etc. should be combined with statistics on public art, parkettes, natural features, place of worship and key businesses to provide a full picture of the assets of that district.

The determination of assets can be completed by the Board of Management or through a membership survey, and supplemented by municipal infrastructure data. This sort of tool could be kept up by the BIA executive and shared with government partners and the broader membership to show ROI.

Economic Development

Gross District Product — Inputs: Sales (HST), employment, land area.

Benefit: Provides a simple ROI measure of the relative impact of the BIA area on sales/employment/building permits on a per square foot basis. Allows for comparable metrics to other geographies, the city as a whole or other commercial areas.

Supporting Local Business

Sales Index

Benefit: Select a common denominator good that would likely be situated within BIAs across the province. This common good should be determined through more rigorous analysis, but for example a business such as a Tim Horton's or Subway or a convenience store. OBIAA would Index this sales trend to reflect a BIA average trend line over time, to represent the health of our downtowns and main streets.

The index could be added to OBIAA or local BIA communications with their members to show a trend line over time.

It should be noted that this is one of a couple of sales tools contemplated over the course of the study. The Index is meant to provide trending on sales at a broader scale, to which local BIAs and their membership could compare their own sales figures. It would provide an index of overall health of BIAs.

Community Building

Network mapping

Benefit: Similar to an asset map, this tool provides a visual depiction of the networks created through the work of the BIA. An important role of the BIA is to act as an advocate and connector both internal to the organization and with external stakeholders. While anecdotally we know of many connections made through BIA effort, a visual map of key relationships would solidify the influence BIAs specifically have in furthering the position of small business, main streets, and downtowns in the broader civic conservations.

This map would look much like a web – with the BIA at the centre, and various network connections branching off of it i.e. municipal departments, community associations, key industry leaders, special advocacy groups, not-for profits, key event holders, etc. This sort of tool could be kept up by BIA staff and shared with government partners and the broader membership to show Return on Investment.

Ontario's Main Street grew organically from roots planted in the province's pioneering history. As communities sprang up, the Main Street centred the villages and towns and provided the economic hub. The businesses on Main Street in turn survived, grew and became the economic engines of their communities.

The importance of Main Street Ontario became obvious in the 1950s and 1960s when municipal planning departments across Ontario encouraged the growth of regional malls, turning their backs on Main Street Ontario. Challenged by increased vacancy rates, low consumer spending, the growing popularity of suburban malls and subway development, local business and property owners needed to attract people to their local area or risk foreclosure. The result was disastrous as the heart of communities began to crumble. The province awoke to the crisis, recognizing that change was needed and penned the innovative and cutting-edge BIA legislation.

The first BIA legislation, housed in the Municipal Act for the Province of Ontario, was created in 1970 in a partnership among the Ministry of Municipal Affairs (MMAH), Bloor West Village and the City of Toronto. This forward-thinking Legislation has undergone a number of changes over the years and, in 2009, BIAs became Local Boards of Council. The revised legislation continues to build and foster partnerships between the municipalities and businesses, including property owners and their tenants, to create vibrant community cores. Remarkably, BIAs, BIDs (districts) and BIZs (zones) have been formed around the world using Ontario's legislation as the model.

The BIA model builds on the idea that pooled social and financial resources within a commercial area can improve opportunity to generate revenue for local business owners. The district levy works to provide guaranteed revenue dedicated to streetscape improvements, and in turn shifts the general business mindset from independent wealth to collective benefit.

In most cases, Business Improvement Areas today still represent Main Street Ontario, the economic backbone of the province. The cultural, historic, and commercial significance of traditional main streets brings with it the need for stewardship and investment in order to move through anticipated and continuous economic cycles. As an Ottawa mayor once quipped, "BIAs are the canary in the coal mine." They are the first to show the impact of policy decisions, and face the market pressures which shift our provincial economy. With this mind, the BIA offers a window for government at all levels to see what's happening in commercial districts across the province. This view should be examined more closely.

A Call to Action

With a current database of more than 308 BIAs in Ontario alone, OBIAA began a project in March of 2016 to increase understanding of the influences at play in our BIA areas and the role they play in community development. This project came out of an increasing need for collective understanding of the role BIAs play in communities across the province and an interest in quantifying their return on investment. In other words, while many have stories of the positive impacts and challenges faced by BIAs, few held the numbers to support their cause, and no one had any sense of what the collective BIA picture was across the province.

Working with the Toronto Association of BIAs (TABIA), OBIAA established a Consultant Team to carry out the work program, including: Fotenn Planning + Design (Project Manager), Brand Clarity, Cobalt Connects and 360 Collective. An Advisory Committee was also struck to help inform the project and guide the project team through key decisions. Advisory Committee members were carefully selected through an application process to reflect the core elements of BIA practice grounded in the acronym HEART: Heritage, Economy, Arts, Revitalization and Tourism. They were also chosen to ensure regional and geographic representation as well as industry expertise.

The challenge ahead was to create a set of metrics that will allow all BIAs to share their work and unique contributions within their communities while building a cohesive and representative set of data on BIAs. The Return on Investment of BIAs project is focused on capacity building and, as such, is not a report card on BIAs individually. Rather, OBIAA's goal is to be a

catalyst for positive community and economic change by enabling growth in Ontario BIAs. This project will help BIAs around the province increase their capacity and understanding in order to position themselves as historically-rooted and future-focused, as important and recognized community and business hubs.

A BIA is integral to advancing a distinct, livable, vibrant and resilient business district within their local community.

One of the first deliverables for the Advisory Committee was to establish a collective BIA story that took in the vast array of work happening across the province. Debate ensued, and while there was recognition that the work BIAs do ranges in scope and scale, there was also agreement that the underlying purpose of the work of a BIA is the same regardless. To this end, the AC established the following BIA Storyline to ground the project and to be used as a reference guide for indicator selection.

Conversation throughout this project continued to go back to this shared understanding of a BIAs work, and how they achieve this on the ground. Ten methods were highlighted through these discussions:

1. Advocating for the local business economy.
2. Attracting and retaining business.
3. Creating a sense of place and a vibrant public realm.
4. Building inclusive programs and infrastructure.
5. Reflecting an inclusive and diverse community.
6. Reflecting and developing local culture and built heritage.
7. Creating a tourist destination.
8. Sourcing funding for local area improvements.
9. Fostering strong public-private partnerships.
10. Directing investment to revitalization efforts.

From this point, the Advisory Committee and the project team took on the monumental task of determining a pool of indicators to reflect the work of BIAs across Ontario. Everyone involved knew this would be a challenging task. From the beginning, it was apparent that agreement on indicators would be difficult, that there would be data gaps and that this Final Report could not or should not actually be the end. The team recognized the need for ongoing data collection, for creating a repository for the data, for ongoing reporting and for the need to recognize what cannot be measured and managed without new processes and tools. What we found through this project was an immense and emerging body of knowledge. The project team looks forward to sharing it with you.

OBIAA, TABIA and Ontario's BIAs wish to express their gratitude to the Project team, the Advisory Committee, the Toronto Entertainment District BIA, the City of Toronto and especially the Ontario Ministry of Municipal Affairs for their collaboration and support and for hearing the collective voice of all BIAs.

A successful BIA has a revolutionary impact on the identity of the municipality, turning obsolete commercial areas into highly sought-after urban environments. A successful BIA is a magnet for new businesses, new residents, and out-of-town visitors. It is a generator of life and energy that stimulates civic pride and communal culture. It brings more people together for social interaction than any other activity. It provides goods and services, inspiration, delight, recreation and romance.

Municipalities and, ultimately, the Province benefit from successful BIA's in myriad ways: an improved image of the municipality, improved property maintenance, improved property value (and hence assessment), improved social cohesion, increased employment, and increased tourism. A strong downtown is also an essential factor in the power and influence of a municipality and, in the long run, it is the key to local philanthropy.

Municipalities also benefit from the efficiency that a strong downtown sustains in matters such as public infrastructure and transportation. The Province's Growth Plan is highly dependent on the success of BIA's as the focus of Urban Growth Centres, Intensification Corridors and Mobility Hubs.

- Jack Dougan, Advisory Committee Member

The Return on Investment of Business Improvement Areas (BIAs) project is a research project spearheaded by the Ontario Business Improvement Area Association (OBIAA) and Toronto Area Business Improvement Association (TABIA) and funded through the Ministry of Municipal Affairs (MMA).

The primary goal of this report is to to identify a set of common indicators for BIAs across the province which reflect the BIAs role in local economies and community development. These indicators will act as a benchmark for BIAs across the province and help to establish the impact BIAs are having in communities of all sizes across the province.

The project will:

- Identify the success factors associated with the current and future state of BIAs which will assist industry, municipalities and the Province in guiding future economic development and community planning decision making in a changing economy.
- Identify key success benchmarks (indicators) against which future trends can be compared to determine BIA effectiveness. These benchmarks may also serve as a planning tool for BIAs and municipalities to assist in determining the state and needs of local economies.
- Identify data gaps and understand and promote the importance of gathering current, relevant data. This work will help with identifying the need to provide tools, templates and possibly training to help BIAs to gather socio-economic data easily.

How to Read This Report

This report presents the findings of the Return on Investment of BIAs study. It focuses in on the outcomes of the work, including the collective set of indicators, data metrics based on reporting BIAs, areas that require further study, and a series of recommendations on tools to both capture and share indicator metrics moving forward.

A series of case studies have also been scattered throughout the document to demonstrate how a number of BIAs are already using indicators and data in their daily practice.

These findings are supported by extensive primary and secondary research undertaken by the project team over the past year. This work is detailed in both a Background Research Report and Consultation Report available under separate cover. The research methodology has been detailed within these supporting studies and further summarized in Appendices E and F.

Finally, a series of tools and recommendations have been provided to outline key priorities moving forward.

It is important to note that the data analysis captured within represents a summation of findings from an enormous amount of raw data. The raw data compiled through this study remains in the ownership of OBIAA and TABIA and will continue to be advanced in the interests of BIAs across Ontario.

REDUCING PARKING COMPLAINTS

Type of Data Collected

Feedback on Parking Utilization.

How It Is Being Collected

Complaints to Parking, BIA, and Town.

The Results

The Downtown Perth BIA met with the municipal By-law enforcement officers and discussed changes to the downtown parking tickets to reduce frustrations from tourists and residents. The wording on the ticket was changed to a softer tone and maps were added to the tickets to clearly show where the municipal parking lots were located.

How It Has Made a Difference

This has reduced the number of parking complaints. The BIA and the Town are still reviewing parking options in the downtown.

MAKING IT EASIER TO SHARE DATA WITH THE MUNICIPALITY

Type of Data Collected

BIA reports to the Town.

How It Is Being Collected

Report format templates used by the Town.

The Results

BIA made a commitment to learn how Municipality reports are formatted. BIA has copied the same format and reporting structure to create increased consistency so that they can be easily read and inserted into Town reports.

How It Has Made a Difference

The Town is a greater partner now and we often share resources. The BIA recognized that they can get more done by working together, rather than trying to do things separately.

DATA THAT INFORMS DECISIONS AND OPTIMIZES STREETSCAPE IMPROVEMENTS

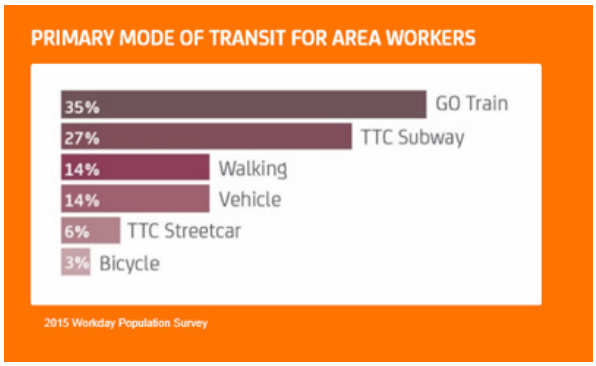
Beginning operations in 2013, the Toronto Financial District is a different kind of business improvement area where 200,000 workers stream in each day 9-5 and retail is primarily located in the underground PATH pedestrian network. The BIA's mandate includes improving public spaces, showcasing daily activity in the area online @MyTOFD and identifying collaborative opportunities that ensure the Financial District is well-maintained, integrated, connected and accessible.

The Toronto Financial District BIA relies on data to inform transportation decisions, public realm improvements and the promotion of its businesses online.

Street Appeal: Using GIS locator data to increase the public realm quality-of-experience.

With many of the largest Canadian firms headquartered in the Financial District, private buildings provide a high-quality of experience and amenities that City standards could never match. A great deal of the BIA's public initiatives are meant to improve the quality of public realm experience to provide a more seamless experience as you move through the area.

Toronto Financial District BIA staff use a GPS-based tracking software to do weekly sweeps of every public realm asset in the area – more than 3,500 street poles, litter bins, street furniture, newspaper boxes, etc. – to make sure that issues and deficiencies are reported to the relevant agencies as soon as possible.



Statistics on the number of deficiencies identified and their resolution rate and timeliness are distributed bi-annually to agencies responsible for the public realm assets. Follow-up meetings with authorities at the agencies are then held to discuss ways to improve response times.

A significant success was identified when the City put the BIA directly in touch with Astral for street furniture issues. By removing intermediaries and repetitive inspections, average response times to clean Astral assets improved by weeks.

In 2016, more than 2,000 issues were reported to appropriate agencies and more than 85% were resolved at year end.

Agencies are supportive of the BIA program because it helps them do their jobs better. By using BIA staff and programs to identify problems faster, the resolutions help agencies improve their response times almost immediately and identify strategies to improve service in the future.

Additional capacity has been added by the BIA in recent years to track high-priority rush-hour issues daily, including parking infractions on major arterial roads and the enforcement of film permits. By identifying trends in where the problem areas are, the BIA works closely with relevant agencies to ensure enforcement personnel are located in the areas they'll provide the most assistance in keeping traffic moving.

Economic Development & Community Building: Member surveys to ensure decisions benefit area members

The Toronto Financial District is the largest employment hub in Canada and coordinating improvements and initiatives include the participation of multiple stakeholders – various City departments, multiple building ownership groups and of course the public. The BIA has become the central planning coordinator for the area by tracking decisions that will impact its operations and aesthetics.

With very few people living in the Financial District, making decisions about the area using census data is not relevant. With this problem in mind, the BIA in 2015 undertook a major survey of the demographics, commutes, lifestyles and expenditures of those who work in the area.

The survey influences the BIA's annual objectives and positions on transportation projects, public realm improvements and other major decisions related to the Financial District.

The BIA has further developed the capacity to utilize surveys on short notice in order to capture public needs and opinions on a case-by-case basis. In 2016, a major new development requested feedback on potential changes to the area and the BIA was able to respond with evidence-based feedback including survey data within weeks.

Support local business: Tracking social media interaction to ensure business promotions reach the widest audience.

A major goal of the Toronto Financial District BIA is to tell the story of the area online. People work hard each day and we do our best to provide them a single source of information about what's going on in the Financial District. When promoting businesses, it is important to avoid a repetitive social media approach or you risk losing your existing and potential followers and their engagement with promotions.

The BIA tracks engagement closely as a measurement even more important than followers. Posts that receive strong engagement are replicated or expanded upon while unsuccessful types of posts are stopped or modified over time.

We share detailed social media information with our area members at their request and use it to work with them on how we can better promote their businesses and services. We also use social media stats as a way to say no. If a promotional style is suggested that we know isn't going to lead to strong engagement, we can instead work with them to develop another post that will.

The Toronto Financial District BIA is always open to finding new ways to track, analyze and use data toward stronger results and looks forward to learning from other Ontario BIAs and the OBIAA Return on Investment report.

ADVISORY COMMITTEE + PROJECT TEAM

The project advisory committee was comprised of 17 industry and governmental leaders from across the province, reflective of the regional, geographical and varied interests of BIAs across Ontario. This group represented the Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA) and MMA regions; small, medium and large municipalities in urban and rural setting and private industry expertise. Most importantly it pulled on the elements of BIA HEART (Heritage; Economy; Arts; Revitalization; and Tourism). It provided strategic direction on the project and guide the development of indicators. The advisory committee met once a month for the duration of the project.

STEERING COMMITTEE:

Kay Matthews
Executive Director
Ontario BIA Association

John Kiru
Executive Director
Toronto Association of BIAs

Sarah Millar
Project Manager
Fotenn Planning + Design

PROJECT TEAM:

John Archer
360 Collective
Toronto, Ontario

Susan McGibbon
360 Collective
Toronto, Ontario

Corien Kershey
Brand Clarity
Ottawa, Ontario

Jeremy Freiburger
CoBALT Connects
Hamilton, Ontario

Sarah Millar
Fotenn Planning + Design
Toronto, Ontario

Phil Busby
Fotenn Planning + Design
Toronto, Ontario

ADVISORY COMMITTEE:

Andrew Marks
Councillor
City of Timmins

Gil Meslin
Research and Development Manager
Artscape

Kevin Narraway
Marketing Manager
Municipality of Port Hope

Angela Scanlon
Jamie Hurst
Invest Ottawa
City of Ottawa

Jack Dougan
President
Markets on Main Street

Laurie Brownlee
Coordinator,
Northern Policy and Planning Unit
Ministry of Tourism,
Sport & Culture

Carlo Gorni
BIA Coordinator
City of Hamilton

Jeff McIntyre
Owner/Chair
Fuel Media/Sudbury BIA

Mike Major
Manager
Toronto BIA Office

Craig Stevens
Executive Director
Downtown Barrie BIA

Jim Mountain
Director, Regeneration Projects
National Trust for Canada

Marty Williams
Executive Director
Downtown Guelph BIA

Darren Shock
Economic Development Specialist
Ontario Ministry of Agriculture,
Food and Rural Affairs (OMAFRA)

Judy Morgan
Judy C. Morgan Consulting

Rebecca Johnson
City Councillor
City of Thunder Bay

Geoff Wright
Economic Development Officer
Municipality of Chatham

Kenna Kozak
Executive Director
Port Perry BIA

Rob Spanier
Partner and Principal
Live Work Learn Play Inc.

USING QUALITY OF LIFE METRICS TO ATTRACT NEW BUSINESSES

Type of Data Collected

Quality-of-life metrics including street furniture and beautification effort.

How It Is Being Collected

Economic development investment, streetscaping, beautification, business mix, events, etc.

The Results

Development investment in the BIA shows a progression and that success lures other companies to want to locate in the BIA. Companies have done their own due diligence and the BIA is the place they are choosing based on not only good economics but good quality of life indicators.

How It Has Made a Difference

New office companies are locating in Downtown Peterborough.

USING DATA TO UNDERSTAND IMPACT AND ADVANTAGE OF DECISIONS

Type of Data Collected

Parking utilization, visitation and pedestrian counts, dwell time.

How It Is Being Collected

Economic impact, sales, parking usage.

The Results

BIA conducted a case study. Through the Municipality and the BIA, one parking spot was removed to create a bump out patio space. The BIA had to justify to members why losing one parking is beneficial in the long term. An example, was the economic impact of one person parking compared to 12 people on the patio.

How It Has Made a Difference

The bump out patio space was a success and renewed.

SELECTING THE INDICATORS

BIAs are required to meet the needs of many people. Not only their membership, but also the broader public and all levels of government. The Advisory Committee were asked to determine these three audiences, and recognize that they are interested in different outcomes. Where each audience wants to understand the value of their BIA, how they define that value may include different indicators and measurements.

- BIA membership: may want to know about consumer density, pedestrian counts, competitive business environment. What is the BIA doing to draw people to the area? The membership wants to know the value of being in a BIA.
- Government: may want to know about job creation; role in strengthening the economy; tax assessments; business retention; establishing a sense of place. The manufacturing sector does a great job of measuring their performance in the categories of job creation and economic value (GDP), and BIAs need to provide the province and municipalities with those same kinds of measurements for BIAs.
- Broader public: may want to know about events hosted, public realm improvements and ways in which the BIA addresses safety. The core indicators for each audience will be determined by the Advisory Committee, following analysis of the primary consultation research.

In order to develop a set of indicators that were relevant to all audiences, BIAs and government agencies were asked to assess the current usage, future importance, and data availability around common BIA goals. The project team recognized early on that the selection of a collective set of indicators to represent BIAs across Ontario was no small feat. The variety of work that BIAs complete, the scales at which they work and the audiences they serve, all lend themselves to a growing list of items to consider when thinking about their Return on Investment.

The project team made the decision to establish the list of indicators based on the desired metrics coming out of the consultation, rather than basing it only on the data available. This was a subtle but important decision. By establishing indicators based on BIAs' desired outcomes, the project sets a broad-based foundation that reflects the full spectrum of BIA potential, rather than restricting BIAs return on investment to metrics that are already established and available. This report will provide a snapshot of what BIAs' return on investment is now, but it will also showcase where there is room to grow and what cannot be measured without new processes or tools created. The project team feels strongly that this is the right approach, as it will raise important questions for the BIA field of practice on what is measurable, what is critical to measure, what should be collectively measured, and if BIAs, municipalities and all stakeholders will be comfortable with the results obtained.

The project program was structured to allow for continued evaluation of the long list of potential indicators by all. Consultation with the BIA membership, the Advisory Committee, government partners and industry experts was designed to allow for early brainstorming on the story the project team wanted to share, and then consideration of the goals which would allow BIAs to achieve that story. Surveys, interviews, workshops, webinars and live polling were all used to slowly whittle down what initially seemed like an insurmountable list.

The consultation brought forward the recognition of the different purposes that the agreed upon indicator set has for each individual BIA. How the indicators are to be used and grouped together will vary depending on the BIA's needs, who they are communicating with (audience), what they want to achieve, and what they expect the outcome to be. The indicators should be geared to achieve outcomes and not just facts or figures used as outputs. There is still discussion as

per the correct denominator for each indicator, the time frame, the comparability and the benchmarking that would be most appropriate for the range of issues that BIAs need to report on.

The iterative process allowed for continual re-examination of priorities and constant reflection on previous selections. Following on from membership surveys and government interviews, the project team and Advisory Committee were asked to assess a consolidated list based on the value of the indicator to each of the prospective audiences, being government, the BIA membership and the public, along with the indicators' ability to achieve the BIA story and overall data availability. Each potential indicator was weighted in each of these factors and total scores were then used to prioritize indicators under each of the four themes.

From an initial list of over 200 potential indicators under eight possible themes, the final list of indicators is a comprehensive list of 30 indicators under four key goals.

The list of 30 indicators were then further prioritized by the project team, Advisory Committee and membership based on a poll of overall interest in the metric over the long term.

As part of the process of developing and refining key indicators, BIAs and government agencies were asked to assess the current usage, future importance, and data availability around common BIA goals. Four goals of BIA practice emerged through the study. These goals reflect the diversity of work BIAs undertake and represent the varying scales at which a BIA may work:

- Street Appeal
- Economic Development
- Support Local Business
- Community Building

Within each goal, a set of indicators was determined through membership, municipal, provincial, institutional and Advisory Committee consultation. A total of 30 indicators have been established to reflect the return on investment of BIAs in communities across the province. These are outlined in the sections below.

Data Capture Methodology

The data capture process began by reviewing the selected indicators and determining the best course of capture for each. This created five data capture groups with specific needs and communication channels:

1. Municipal Data – all indicators where data would be held by municipal or regional governments within GIS systems, open data portals, or standard data capture such as taxation, land mass, permitting, etc.
2. BIA Staff – all indicators where BIA staff throughout the province would be the logical partners. This section focused on operational data (collaboration with City and community, operating budgets, etc.) as well as in-the-moment data such as vacancy or specific asset mapping.
3. BIA Membership – all indicators related to the operation or perception of a BIA through the eyes of businesses owners within the area.
4. Third Party Data – all indicators where the data is best tracked or owned by a party outside of the OBIAA or municipal structure. This includes indicators such as assessment value via MPAC, property sales values via local real estate boards, employment via Statistics Canada, etc.
5. Custom Data – all indicators where a key source could not be identified such as pedestrian counts, retail sales, qualitative impressions, etc.

Based on these categories, Cobalt Connects either created standardized data capture forms to share with the related parties, explored relationships with third parties, or gathered the information independently specifically for this project. Through the assistance of

THEMES AND INDICATORS	
STREET APPEAL	
Street Appeal — Physical	
1.	Streetscape and façade investment (1.1.2)
2.	Placemaking (1.1.1 / 1.1.3. / 1.1.4 / 1.1.5)
Street Appeal — Visitor Experience	
3.	Actual event attendance (1.2.1)
4.	Conversion rate of event attendees (1.2.4)
5.	Average dwell time in BIA (1.2.6)
6.	Quality-of-life metrics (1.2.7)
ECONOMIC DEVELOPMENT	
1.	Employment statistics (2.0.1)
2.	Building permits (2.0.2)
3.	New business openings (2.0.3)
4.	Assessed property value with BIA (2.0.8)
5.	Gross District Product (2.0.10)
6.	Business mix (2.0.12)
7.	Anchors (2.0.11)
8.	Assessed housing value of surrounding area (2.0.13)
9.	Housing prices in surrounding area (2.0.14)
SUPPORTING SMALL BUSINESS	
Business Impact	
1.	Sales (3.1.1)

THEMES AND INDICATORS (continued)	
2.	Business hours (3.1.5)
3.	Visitor satisfaction (3.1.6)
4.	Gross leasable area (3.1.7)
5.	Business turnover (3.1.8)
6.	Business longevity (3.1.9)
7.	Vacancy rates (3.1.10)
8.	Number of small independent businesses (3.1.11)
9.	Number of chains (3.1.12)
Visitation, Movement, Marketing	
10.	Things to do in the BIA/region (3.2.3)
11.	Parking utilization (3.2.4)
12.	Pedestrian counts (3.2.6)
13.	Visitor recall of BIA marketing (3.2.8)
14.	Visitor reviews and testimonials (3.2.9)
COMMUNITY BUILDING	
Internal to the BIA	
1.	Strategic plan achievement (4.1.1)
External to the BIA	
2.	Municipal capacity building – collaboration with municipality (4.2.1 /4.2.2 / 4.2.3)
3.	Local capacity building – engagement with local groups (4.2.4 / 4.2.5 / 4.2.6)
4.	Safe environment –stats, perceptions, police engagement (4.2.8 / 4.2.9/ 4.2.10)

Diane Ploss, Municipal Advisor at the Ontario Ministry of Municipal Affairs, the project team reached out to a wide range of communities across the province, and via the consulting team and OBIAA, reached out to BIA staff and third-party sources.

Confidence Scale

Based on the outcomes of the data gathering effort, the project determined a confidence scale to provide guidance on how the indicator should be viewed as a benchmark now and the extent of the gaps. For each confidence scale, four factors were considered:

- Data credibility: the degree to which the sources of the data are reliable and up-to-date.
- Geographic representation: the degree to which the data represents Ontario broadly as opposed to a geographic concentration in one city or region.
- BIA Density: the number of BIAs reporting data.
- Data relevance: the degree to which the data addresses the indicator directly. Data can be specific to the indicator or tangential, requiring further extrapolation or assumptions.

For each factor, a ranking of 0 to 3 is provided: with 0 representing the lowest confidence and 3 representing the highest.

For each indicator in the Appendices, an overall confidence marker is provider as an icon indicating confidence out of 100.

Note to the Reader

The indicators depicted within this study provide us with a snapshot of what is happening out there in the world of Business Improvement Areas in Ontario. They start to establish the unique set of data that is necessary to represent the dynamics role of BIAs across the province. They also highlight the influences and external factors at play within each BIA geography. The intent of this study is not to attribute each of these findings to the existence of a BIA, but to provide a dashboard on what is happening in these areas from which the project team and BIAs can draw commonalities and differences across the province. This will then allow the province, municipal partners and OBIAA and TABIA to understand and support the role BIAs are, can and should be playing to ensure continued success of our commercial districts.

Further analysis of the correlation between specific indicator results and the role of the BIA in generating the result must be explored. While the work completed clearly demonstrates that BIAs have influence in our commercial district success, the dissection of that influence versus the influence of external economic factors, politics and governance on trends over time should be examined. Comparisons against broader geographies and areas without BIA organizations in place could aid in this analysis.

GOAL: STREET APPEAL

Streetscape beautification and improvements to the public realm above and beyond those provided by the municipality are ground zero for Business Improvement Areas. Mandated through the Municipal Act and further encouraged through the membership, tactical physical improvements to street furniture and buildings are some of the most obvious benefits of having an organized association dedicated to public realm improvements for the area. All BIAs recognize the importance of this work for their membership, their local municipality, their peers and the province as a whole. In addition to the physical condition of the street, visitor experience is also considered a key priority of BIAs. Core to visitor experience is the BIAs ability to facilitate events to draw people to the area and create a sense of place worth visiting.

Creating Critical Mass

Regardless of the size of the community or BIA, managers feel that cultural properties and signature natural elements (major park, body of water, etc.) are the best assets for attracting a critical mass to their BIA. Despite their power to draw people, cultural properties only comprise on average 1% of the business mix of BIAs.

59% of BIAs currently measure some aspect of indicators associated with the physical conditions of their BIA. 38% of the data is extensive or very extensive. 50% stated that measuring these physical conditions indicators are critical to future success of the BIA.

For some BIAs, beautification, streetscape, and façade type programs can be both a strategic goal as well as a tactic. They can be used to create an enhanced playing field for all businesses and potential businesses to do well. Through creating a more attractive, welcoming, and hospitable atmosphere, the BIA removes some of the obstacles to potential business success.

The programs as mentioned are also used as part of indicators for community building thereby increasing member buy-in for the BIA. The BIA proves its worth and ability to deliver through these tangible programs that BIA members see value in. Often the BIAs mentioned success stories associated with doing pilot projects such as new public squares, streetscaping, parkettes, etc. and how they measured the qualitative and quantitative impacts to illustrate the success.

38% of BIAs collect information on customer experience. 19% of BIAs are able to collect extensive or very extensive data. However, 52% believe that data on customer experience is critical to the future success of the BIA.

A focus on visitor experience is events. As events are a key function of many BIAs, data on who attended, where they came from, how much they spent and their economic impact are important. Many BIAs stated they wanted to determine the propensity for an attendee to return as a key success measure for an event. Within the visitor experience are elements of placemaking metrics and quality of life metrics. As noted, these measures can then be used by the BIA and developers on retention and investment attraction.

STREET APPEAL INDICATORS

Physical

1. **Streetscape and façade investment:** This group of indicators looks at how BIAs leverage money from different sources including the BIA levy, municipal money, grants, CIP funding, sponsorships.
2. **Placemaking:** This group is a combination of four indicators: amount of money spent on beautification, number of street amenities, placemaking metrics, and public realm completion rate. All of these indicators combined will help inform OBIAA's definition of placemaking.

Visitor Experience

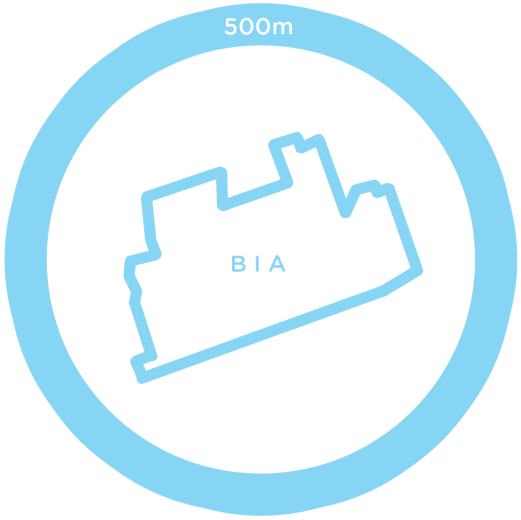
3. **Actual event attendance:** This indicator is valuable as a measure of the ability of BIAs to draw visitors from outside BIA boundaries.
4. **Conversion rate:** This indicator is beneficial to both economic development municipal staff, local BIA administration and their membership in understanding why people visit the business district and gain insight into their motivations.

Leveraged Investment

Façade improvement programs in BIAs are a unique metric for understanding how municipal programs leverage greater investment. 55% of reporting BIAs had members leveraging façade programs, generating an average 2.5:1 private sector-to-municipality investment ratio with an average of $0.17 per capita invested. In smaller communities (under 100,000 pop.), the investment ratio reached as high as 6.6:1, and the per capita investment reached as high as $2.53.

5. **Average Dwell Time within the BIA:** This indicator provides important information for event planning, parking utilization and ongoing parking requirements. It also allows municipalities and BIAs to be able to track the benefit of public assets such as investment in a public market to see those who visited the market and then created a catalyst by visiting other businesses in the BIA.

6. **Quality of Life (including livability measures and perceptions):** This indicator is critical to provide a snapshot of the vibrancy and perception of a range of things within an area. Knowledge of this metric will let neighbourhoods and BIAs make more informed decisions about new buildings, business mix, and future public realm investments with accuracy.



PLACEMAKING ASSETS

4 SCHOOLS

10 PLACES OF WORSHIP

12 PARKS

2 ARTS FACILITIES

FACADE GRANTS

AVERAGE BIA:

MUNICIPAL CONTRIBUTION **1 : 2.5** PRIVATE SECTOR SPENDS

PER CAPITA SPENDING = $0.17

UNDER 100,000 POPULATION:

MUNICIPAL CONTRIBUTION **1 : 6.6** PRIVATE SECTOR SPENDS

PER CAPITA SPENDING = $2.53

GOAL: ECONOMIC DEVELOPMENT

As a business-oriented entity, the ability for BIA organization to improve the area for commercial success is critical. Economic Development indicators provide a platform for BIAs to demonstrate the role they play in assisting commercial enterprise in achieving that success. While all stakeholders can agree that economic development is an important component of any community's business area, whether in a downtown or neighbourhood area, the challenge through this study has been to establish the right indicators to reflect their work. Our consultation identified the need for evidence based decision making, hard facts, and the need to report on outcomes instead of outputs.

Employment

BIAs have an incredible responsibility as key employment areas. A sample of 132 BIAs across Ontario revealed BIAs with a daily employee intake that swells the daytime population by 800% and other BIAs that account for a significant proportion (ranging from 20% to 90%) of the jobs in a community.

One of the most controversial topics was employment. From a government perspective at all levels, increasing employment is a key goal and desired outcome. However, many noted that BIAs do not have any direct control over employment. Employment was argued to be subject to global market forces. However, interviewees noted that proxies for employment could be used to help to describe the relative health of a BIA in comparison to other areas.

Another measure related to net new investment was critical to illustrate growth. Building permit type data in relation to other areas would be used to assess this indicator. A large majority of BIAs (62%) stated it was critically important to their future success. 58% of BIAs have data related to economic development indicators but only 36% have extensive or very extensive data on this topic.

A potential indicator is to distill the data collected into a relationship-oriented statistic such as:

- The power of one more resident on the business sales
- The leveraging power of one dollar of BIA levy combined with municipal, grant, other monies on streetscaping or facades

There is a tipping point whereby economic development related success breeds more success and it becomes an accelerated curve.

This type of data is collected by both municipalities and BIAs. There is no set pattern for who collects the data and pays for it. If the municipality collects the data for the BIA, the BIA should assist and collect and share information on BIA for the municipality (reciprocal arrangement). Some municipalities collect the baseline information on behalf of the BIAs to free up their time to focus on program delivery (which is not a core competency of the municipality).

BIAs can increase the capacity of businesses to do business properly. BIAs can build capacity through their ability to leverage funds through a multiplier effect.

Building Permits

BIAs are epicentres for commercial and residential building permit activity. From 2011 to 2016, the value of building permits in reporting communities increased by a value of 263% (commercial) and 228% (residential) respectively while the number of permits remained relatively stable.

ECONOMIC DEVELOPMENT INDICATORS

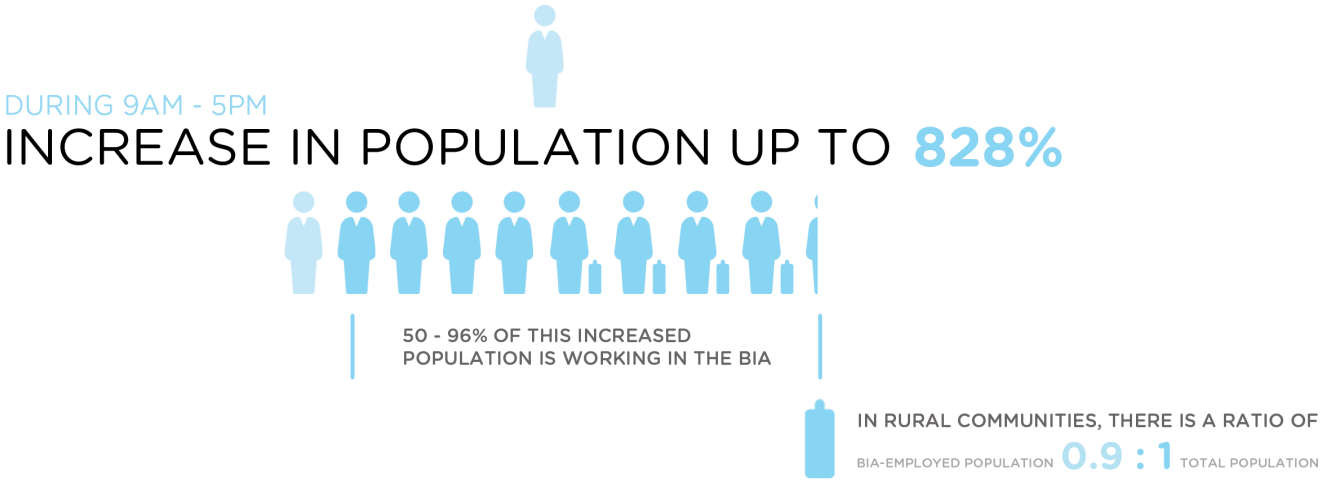
1. **Employment:** Jobs are a priority indicator of resilient communities and a healthy economy for all levels of government and local residents. While there is differing opinion on the BIAs ability to impact this metric, it is a standard baseline measure of the prosperity of an area.

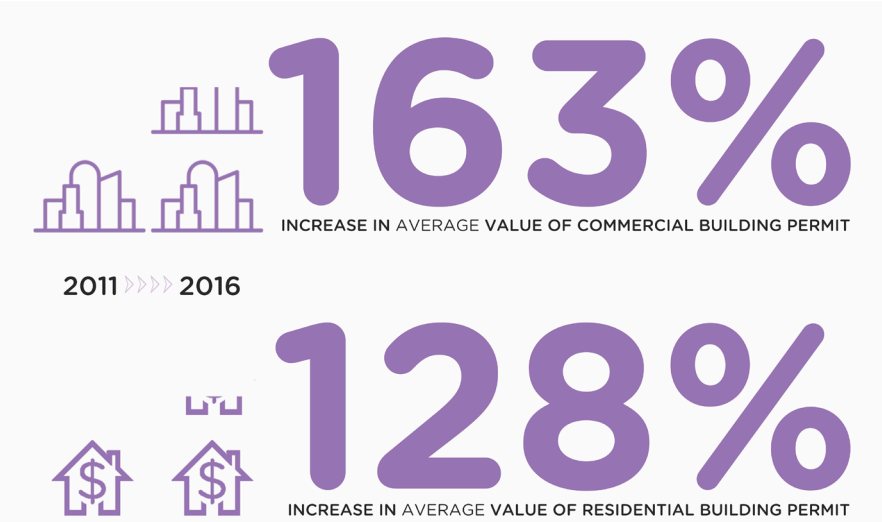
Assessed Property Value

Among 30 reporting BIAs, the average total assessed property value was $216,428.280. In communities with a population between 100,000 to 500,000, this value was 25% higher than the average, while in communities between 500,000 and 1M in population, the value was 125% below average.

2. **Building permits:** This indicator is a measure of economic growth in and desirability of BIAs as measured by the number of commercial, residential and industrial building permits issued.
3. **New business openings:** A measure of business robustness, this indicator helps measure economic growth, desirability and business resilience. This indicator is best compared to business closures in order to truly measure business growth.
4. **Assessed property values:** Property values are a good reflection of an area's desirability, and as such, is a helpful indicator in understanding the impact that BIAs have on property values in and around their zones.
5. **Gross District Product:** Gross District Product is a combination of indicators that work in relation to one another to form a rating for a geographic area. These indicators can be compared to one another using the same metrics. The indicators included in GDP are: sales, employment, gross leasable square footage, actual land values, assessed property value, and private sector investment.
6. **Business mix:** Business mix looks at the relative number of different types of businesses in BIAs to understand how well they can weather ups and downs in various sectors. As a result, business mix is a useful indicator for BIA resiliency.
7. **Anchors:** Part of the business mix, the anchors indicator looks at major retail other draws that can reliably bring visitors into BIAs. Anchors are another contributor to BIA resiliency.
8. **Assessed value of surrounding area:** Gauging whether a BIA has influence beyond its commercial borders on land and property values is extremely important in understanding its impact.
9. **Housing prices in surrounding area:** In the same way, a useful indicator in assessing a BIA's influence is to understand its influence on housing prices.

EMPLOYMENT





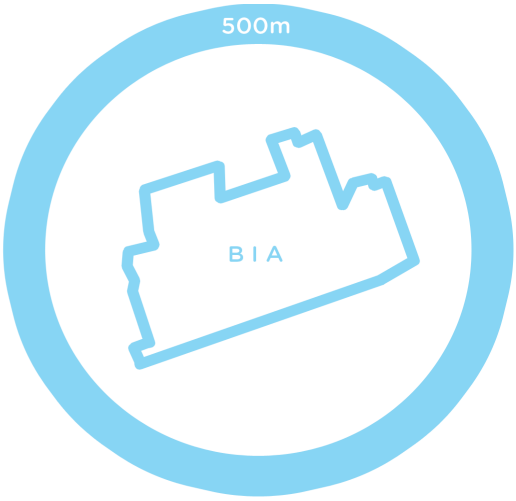
SINGLE FAMILY HOME & CONDOMINIUM VALUE

INCREASED BY 46% BETWEEN 2011 AND 2016

EXTREME RATES OF CHANGE:

HIGH 300%

LOW 28%



BUSINESS MIX

ASSESSED PROPERTY VALUE

100,000 - 500,000 POPULATION CITIES

25% HIGHER

AVERAGE:

$ 216,428,280

500,000 - 1,000,000 POPULATION CITIES

125% LOWER

GOAL: SUPPORTING LOCAL BUSINESS

A business improvement area is an association of business and commercial land owners within a defined area working collectively to make the district a better place to do business. Supporting local business is a core tenet of BIA success, and one that was identified as a priority through this study. The goal of supporting business has within it, a number of facets to consider.

- Business impact to ensure the work of the BIA association is actually influencing the success of the individual businesses within its boundary.
- Visitation to ensure that the BIA association understands the dynamics of visitation to the

Chains

Chains, a corporation with 4 or more locations, can play a wide range of roles in a BIA. Professional services or financial chains, such as bank branches or national accounting firms, can bring quality services and high quality employment. Fast food restaurants or big box stores can bring hard competition to small business or discourage independents from moving in. On average, chains make up 7% of BIA members in Ontario, with average in cities of between 100,000 to 500,000 in population reaching as high as 12%.

ROI of BIAs OBIAA Ontario tabia Toronto Association of Business Improvement Areas BRAND CLARITY CoBALT CONNECTS. FOTENN

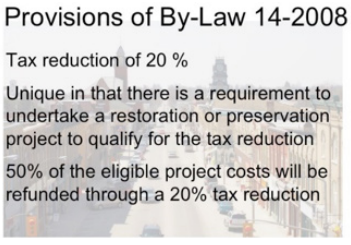
USING DATA TO PROMOTE AND SUPPORT HERITAGE PRESERVATION

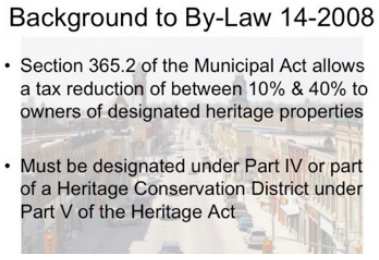
The Seaforth Business Improvement Area (BIA) is located in the Town of Seaforth (pop. 2,300) in the Municipality of Huron East and has been in existence since the 1980s. Over the years, it has seen changes in business ownership, economic conditions and consumer shopping habits, to name just a few. In response to these changes, a decision was made to develop a strategic plan for the BIA in 2011.

This long-range plan would address changes the BIA felt were necessary to maintain a viable business district, but couldn't be accomplished with short-term planning and funding. BIA members, the Huron East Economic Development Officer and the municipal appointee were invited to attend three (3) strategic planning sessions (June 15, July 28 and August 10, 2011). As a result, the Seaforth BIA Strategic Plan was created. (Ref: Strategic Plan can be found in its entirety under Important links on Members' Page of the Seaforth BIA website. (**www.shopseaforth.ca**) This document established goals and allocated funding over five years that provides a roadmap for the BIA to follow. The end result will be an attractive, vibrant business area in Seaforth. Note: This plan has been recently updated and extended to the Year 2021. For the purpose of this study, the Municipal Heritage Conservation District Guidelines and Municipal Heritage Tax Relief Program will demonstrate how they have positively impacted the Seaforth BIA.

Type of Data Collected

Renovation costs and associated tax rebates through the Municipal Heritage Tax Relief Program adopted by the Municipality of Huron East By-Law 14-2008. (Ref: Background below)





How It Is Being Collected

The data was collected through heritage applications and building permits submitted to the municipal heritage committee and building department by qualifying business and property owners, who are located in the Heritage Conservation District (HCD) and the BIA. The boundaries of the HCD overlap most of the Seaforth Business Improvement Area.

Why It Is Being Collected

One of the goals of the strategic plan was "to maintain and sustain Seaforth's downtown built heritage" through guidelines and tax relief programs. The data and visual examples are evidence of the effectiveness of the program. It is believed that restoration within the heritage conservation district has been a catalyst for investment within the BIA, even though some properties were not eligible for the tax rebate.

Results

YEAR	# PROPERTY APPLICATIONS	PROJECT COST ($)	HERITAGE GRANT TAX REBATES ($)
2009	1	1,795	897.75
2010	3	2,416	1,208.07
2011/12	3	915,000	0.00
2013	5	1,874,104	9,052.15
2015	1	3,420	1,710.36
2016	3	42,406	10,203.00

How It Has Made a Difference

The objective of the strategic direction (Physical Enhancement) is helping maintain the integrity of Seaforth's historic building stock located in its business district. Municipal resources and partnerships have encouraged new investment. The end result is an attractive, vibrant business area in Seaforth.

For examples of past restoration projects in the Seaforth BIA, follow link to view the 2012 OBIAA award winning Bricks & Mortar Initiative "Dressing for Success."

USING PEDESTRIAN COUNTS TO BOOST MARKETING RESULTS

Type of Data Collected

Pedestrian Counts

How Is It Being Collected

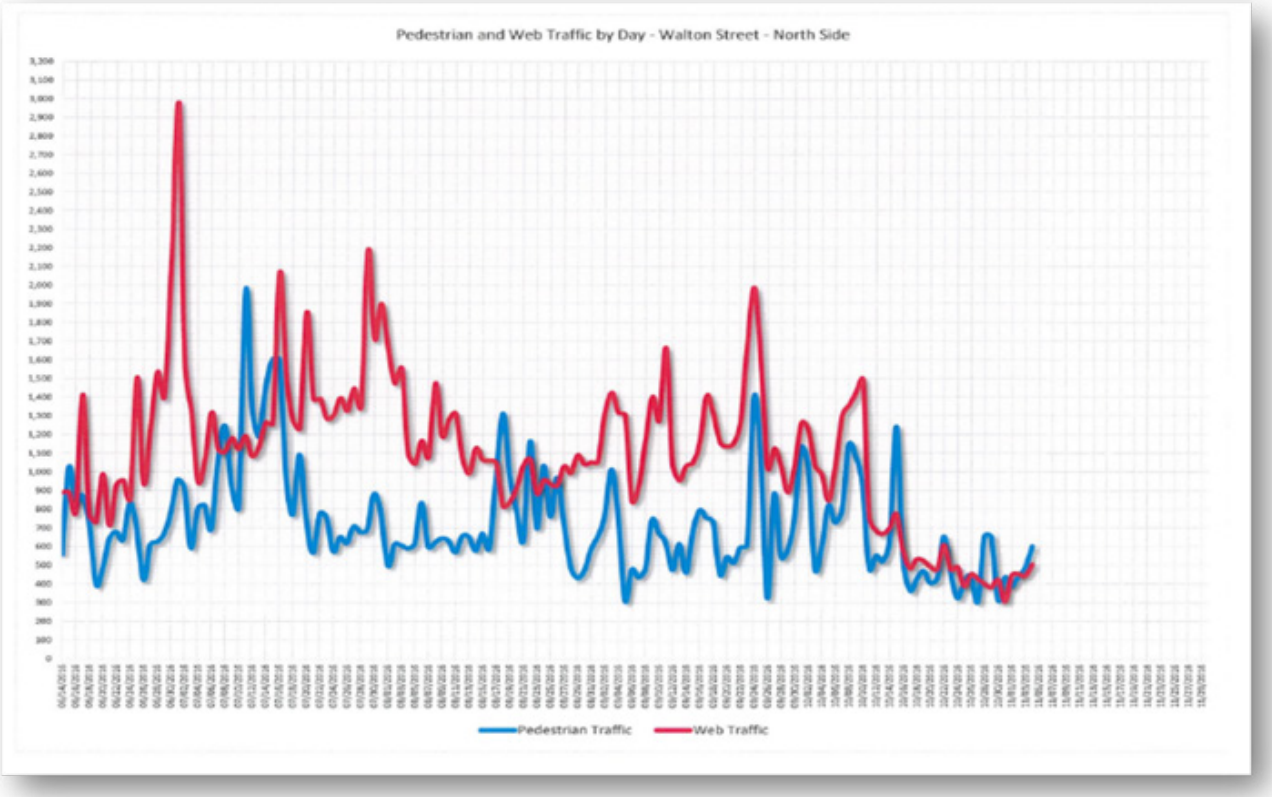
Digital Pedestrian Counter (Eco Counter)

The Results

Pedestrian numbers were taken from a strategic point at the entry to the BIA area through the use of a digital measurement tool made available through the municipality. Pedestrian counts are being measured at 1,975 people on peak days and over 250,000 per annum within the BIA. The use of a digital tool has allowed the BIA to understand pedestrian flow for each day of the week, noting traffic doubles on Saturdays.

How It Has Made a Difference

Beyond providing a basic understanding of pedestrian traffic occurring within the BIA for any given day of the week, these metrics have also assisted the Town and local business owners in understanding correlations between pedestrian traffic and the timing for promotional marketing campaigns and events. For example, the Port Hope Annual Salmon run draws an exceptional number of pedestrians into the BIA area. Through a greater understanding of these numbers, business owners within the Town are able to tailor business hours to peak traffic, and the Town is able to ensure critical municipal support and infrastructure is in place during that time.



area, and is strategic in how it positions itself to maintain and attract more visitors.

- Movement within the BIA to be able to ensure that all areas within the BIA boundary are being serviced appropriately and that it results in increases in foot traffic.
- Marketing which supports the individual business's own advertising to encourage visitation and increased sales.

Business Impact

51% of BIAs measure some sort of indicators associated with business impact. Only 22% have extensive or very extensive data. But 53% believe that it is critically important to the future success of the BIA.

Through the consultation process, interviewees were very keen to know more about business impact including sales or proxy for any sales information. This is especially relevant for those BIAs with a higher proportion of retail and/or food service type businesses.

A common indicator was new business openings as a way of illustrating the success of the BIA area. BIAs felt that businesses who had done their due diligence and chose their BIA not only showed the viability of conducting business in their area but also were symbolically important.

In addition, why hard statistics are essential, the storytelling of new businesses opening, success factors for a long-established business and pilot projects were important.

Visitation

A low percentage of BIAs assess indicators associated with visitation to the BIA. Only 13% had extensive or very extensive data related to visitation. A low percentage of 36% felt it was critically important to the future success of the BIA. Some BIAs felt that they had little control over who comes into the BIA. BIAs were more focused on those who were already in the BIA area, encouraging them to stay longer, to cross shop, etc.

Tourism-dependent BIAs are very focused on visitation especially during the shoulder seasons. Often BIAs will look to proxy data and observational data as a means of determining visitation indicators.

BIA events require visitation statistics (see Visitor Experience). The BIAs need to assess the net new investment derived from visitor inflow. Not all BIAs are convinced this is a good measure directly affecting their success. An interesting observation was related to the local trade area and resident engagement. As noted, a number of BIAs rated resident engagement as low. However, during the interviews many BIAs noted that they are actively collaborating with local residents.

A key measure of success would be when the local residents in the BIA trade area become active and vocal proponents/advocates for the BIA and businesses. They become unofficial BIA ambassadors in their everyday life. Visitation indicators are also used as part of community building. The statistics are provided free by the BIA to the businesses so that they can adjust their operations based on the information.

Movement Within a BIA

40% of BIAs measure indicators related to movement within their BIA. 25% stated they have extensive or very extensive data. 38% stated it was critical to the future success of the BIA.

Pedestrian counts were the most often noted indicator. Some BIAs collect counts themselves and others rely on the municipality. However, there often is no consistency. A small number of BIAs are able to use pedestrian count and flow type information to influence economic development decisions. Data can be used to illustrate the potential impact on pedestrian flows in a BIA if a development is placed in different locations.

Marketing

Marketing related indicators were the most gathered metrics by BIAs.

82% of the BIAs had metrics related marketing, but only 38% had extensive or very extensive metrics. At the same time, 56% believe that marketing-related indicators are critical to the future success of the BIA.

Interviewees noted that they do collect a lot of marketing statistics especially related to online

marketing such as website tracking, Facebook likes, clicks, etc. However, they also said they weren't 100% sure how useful the information was or whether the members actually care about the information collected. Often the BIAs will rely on anecdotal evidence to see if marketing is working as opposed to actually undertaking number counts.

SUPPORTING SMALL BUSINESS INDICATORS

Business Impact

1. **Retail sales:** This indicator shows the productivity and prosperity for the area – both the business area itself but also the surrounding neighbourhood.
2. **Business hours:** This indicator speaks to the consistency of opening and closing hours in the BIA and setting and meeting visitor expectations.
3. **Visitor satisfaction:** BIAs support their members by drawing in repeat visitors, and visitor satisfaction is a key indicator.
4. **Gross leasable area:** The indicators measures the density of leasable space within a BIA. This would primarily be used to compare against other factors such as business mix, membership numbers and sales to set benchmarks.
5. **Business turnover:** Turnover reveals whether businesses in the BIA are sustainable and if being within a BIA increases their viability.
6. **Business longevity:** Indicates if BIAs are home to long-standing businesses and whether SMEs have greater longevity when in a BIA.
7. **Vacancy rates:** Tied to both longevity and turnover, vacancy rates are another indicator of how well businesses are faring in the BIA and the demand for entry by other businesses into the area.
8. **Number of independent businesses:** Together with number of chains, this indicator is a factor in the ability of BIAs to draw in shoppers.
9. **Number of chains:** Together with number of independent businesses, this indicator is a factor in the ability of BIAs to draw in shoppers.

Visitation, Movement and Marketing

10. **Things to do in the BIA/Region:** This indicator speaks to the number of assets that BIAs have to draw in visitors and the percentage that these assets as part of the business mix.
11. **Parking utilization:** Parking has always been an issue for BIAs, and this indicator looks at parking use as a measure of visitor inflow, length of dwell time and ability to accommodate sufficient vehicles for the demand.
12. **Pedestrian counts:** Pedestrian Counts are considered a key indicator for event success and allow both local businesses and the municipality the opportunity to market successes, encourage sponsorship of future events, assess barriers, and establish peak business periods.
13. **Visitor recall of BIA marketing:** This indicator would allow BIAs to assess to some degree the success of their marketing investment.
14. **Visitor reviews and testimonials:** Related to visitor satisfaction, this indicator looks at how often and to what degree visitors boost the BIA based on their own experiences.

VACANCY

POPULATION	% OF VACANCIES
OVER 1,000,000	6.3
500,000 - 1,000,000	9.4
100,000 - 500,000	21.6
25,000 - 100,000	9.5

GOAL: COMMUNITY BUILDING

Community Building is the goal which positions some BIAs from the pack. Where all associations are focused on improvements to the street, enhancing the appeal of the area for visitors and consumers through marketing and events and supporting commercial business through these efforts, not many recognize the influence achieved through community building efforts. It is this goal which exemplifies the soft power of a BIA to influence change and establish new directions and patterns both within the neighbourhood and the municipality.

This study allowed us to identify a need to engage members, build relationships and leverage partnerships to move forward as a successful BIA. Measuring the level of community building and social capital investment is often anecdotal and qualitative rather than "hard number" oriented.

38% stated it was critically important to the future success to measure community building. 41% of BIAs report on community development indicators and 24% have extensive or very extensive data on these indicators.

Municipal Collaboration

84% of BIA staff rate their level of collaboration with their municipal partners between 7 and 10 (10 being excellent). BIA staff are working with a range of as many as 15 different departments, with the vast majority focused on economic development and tourism and culture.

It is interesting to note that many BIAs will use the indicators or program tactics as a means to encourage increased BIA member buy-in. This includes providing members with data on pedestrian counts, economic impact studies, commercial studies, beautification, etc.

Some interviewees did not think community building was important and there is a small divide between those who think BIAs lean more towards economic development and those who lean more towards community building.

However, some noted that investment in community building and quality of life components are part of an economic development investment strategy.

It was determined that internal community building with BIA members should be separated from external community building with governments and local stakeholders.

COMMUNITY BUILDING INDICATORS

Internal Community Building

1. **Strategic plan achievement:** Understanding the nature of BIAs strategic planning practices provides a view into general Board and staff competency, their ability to be responsive or focused, and to a degree, the level to which they are working with intention.

External Community Building

2. **Amount of collaboration with municipality and BIA submissions and presentations to Council:** These two indicators together look at the degree of collaboration with and within the municipality, as well the degree of advocacy for the BIA.
3. **Engagement with neighbourhood organizations and number of non-BIA events held in the BIA:** These two indicators together provide a measure of how well BIAs collaborate with other organizations by looking at the levels of engagement with local neighbourhood groups and associations, the number of committees and organizations that BIAs sit on, as well as the number of external organizations that want to host events in the BIA.
4. **Safe environment:** Actually a set of three indicators, this group look at both actual crime, attitudes to crime and collaboration by measuring crime statistics, perception of crime and engagement with local police.

RETURN ON INVESTMENT: TOP SEVEN INDICATORS

Now, 30 indicators may seem like a lot, and we agree, it is extensive. In part, because the role BIAs play in general is extensive, but mostly, because the role BIAs play across Ontario is unique.

This pool of indicators will allow for BIAs to deliver on the requirements under the Municipal Act, along with the needs of their membership and broader community. The BIA story is both shared and distinct. As a result, so must be the baseline for each BIAs return on investment. Indicator metrics can and should be chosen from the pool to best represent each BIA's distinct role – where a rural small town BIA may serve a critical role in facilitating new business and enhancing the street appeal, a large urban centre BIA may instead be focused on community building within the neighbourhood and building partnerships with the municipality. Both efforts are valid, and both need to be recognized as part of the overall return on investment of a BIA. This study has also shown that commonalities exist across the province in what BIA associations and their stakeholders expect to achieve through the creation of a BIA. Seven indicators have been identified as the most important and consistent across the province.

The top seven were developed from consultation with the Advisory Committee and with BIAs across Ontario via webinar. As illustrated in the table above, seven indicators were cited by both groups as within their top 11 preferred key indicators:

New Business Development

Small-to-medium enterprises are the lifeblood of the Canadian economy. BIAs across the province are becoming home to start-ups: on average, start-ups represent 6% of BIA members. The strongest performers in attracting newly-formed businesses are BIAs within communities between 500,000 to 1M population – these BIAs are hosting on average 17 young businesses per year.

1. Sales – actual numbers
2. Gross District Product (sales and employment by square acreage)
3. Employment
4. Business mix – anchors, critical mass, plan alignment
5. Business resiliency – turnover, vacancy and longevity
6. Money leveraged for streetscape
7. Visitor satisfaction

Through consultation with both the Advisory Committee and the broader membership the project team asked the question, "If there were ten things you could know about a BIA, what would they be?"

Consensus was found around seven core indicators. These are outlined in the chart on page 29.

INDICATOR	ADVISORY COMMITTEE	WEBINAR POLL
Sales - actual numbers	1	7
Gross District Product (sales, employment)	2	10
Employment statistics	3	2
Business mix - anchors, critical mass, how aligns with Plan	4	3
Business resiliency - turnover, vacancy, longevity	5	1
Safety	6	
Amount of gross leasable area	7	
Money leveraged for streetscape	8	4
Actual land values, rent values	9	
Private sector investment	10	
Visitor satisfaction	11	8
Assessed property values		5
Placemaking - money spent on beautification, number of physical assets		6
Yearly review of Strategic Plan achievement		
Customer draw potential (number of chain and independents)		9
New business openings		
Actual event attendance		11
Average dwell time		
Local capacity building		
Building permits by category		
Number of things to do in BIA/Region		
BIA Zone of influence		

HOW DATA DRIVES MUNICIPAL INVESTMENT AND GIVES A BIA A POWERFUL VOICE

Type of Data Collected

Sales, Employment, Land Area

Data Tool Used

Gross District Product

How It Is Being Collected

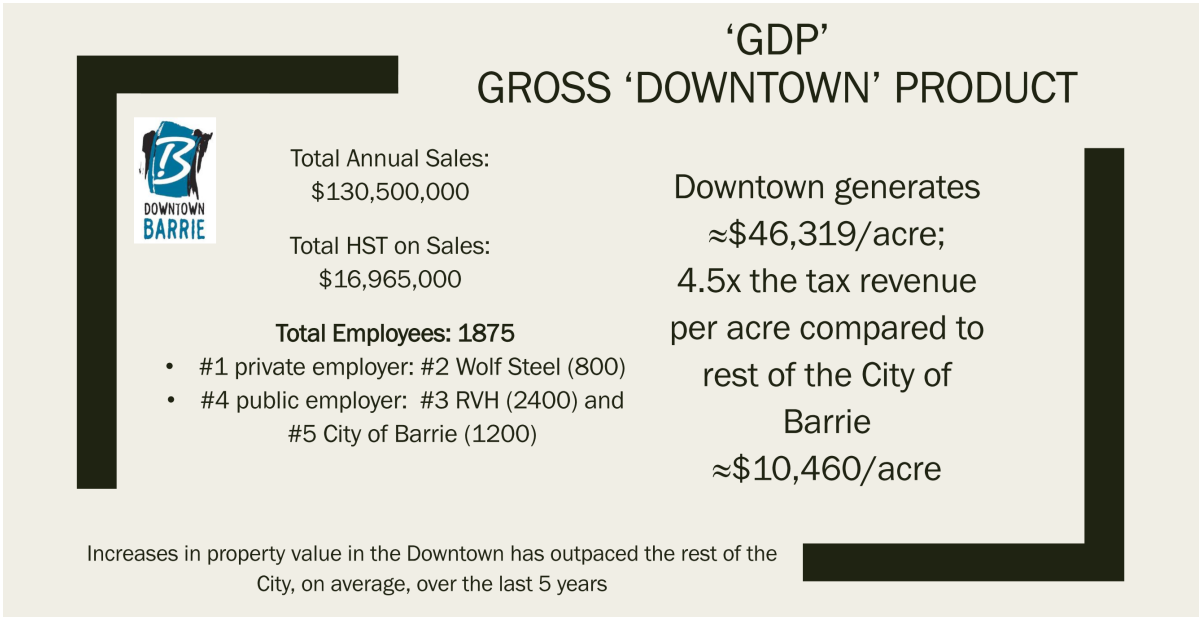
BIA-specific data was gathered on employment through the municipality based on their annual employment survey; employer and employee count data was gathered using membership data; land area information was gathered using digital GIS area calculations, Sales data was taken from annual HST sales information and reverse-multiplied to generate the actual sales figure.

The Results

The Downtown Barrie BIA was able to quantify their geographic importance in the city's overall economy through this work. The data captured for the BIA area was compared against the broader land area for the municipality to create a Gross Downtown (District) Product for the BIA. In Barrie's case, the BIA is home to the #1 private employer (Wolf Steel) in the City, is the #4 public employer in the City (Royal Victoria Hospital and the City of Barrie) and generates 4.5x greater sales tax revenue than the rest of the City of Barrie on whole.

How It Has Made a Difference

These powerful numbers help the BIA frame their role in broader city-building initiatives and the importance of political attention and municipal investment in the area. The inputs to the GDP metric have been used for presentations to the municipality to assist the BIA in successfully securing funding for downtown improvements including their main pedestrian square. The information has also been linked to the BIA's Brand Action Plan (BAP). The data has also been shared visually through the creation of an 'infographic' of the actual BIA area. This large format print serves many purposes for the BIA: 1) it helps share the BIA story with visiting business owners, prospective property owners and municipal staff, and 2) it allows the Board to focus decisions around key metrics in regular meetings.



STREET APPEAL

AMOUNT OF MONEY LEVERAGED FOR STREETSCAPE

Façade improvement programs in BIAs are a unique metric for understanding how municipal programs leverage greater investment. 55% of reporting BIAs had members leveraging façade programs, which generated an average 2.5:1 private sector to municipality investment ratio with an average of $0.17 per capita invested. In smaller communities (under 100,000 pop.), the investment ratio reached as high as 6.6:1, and the per capita investment reached as high as $2.53.

PLACEMAKING

Money Spent on Beautification

From over 40 reporting BIAs, we found a median spend of $32,500 annually dedicated to beautification, with a clear focus on flower bed and hanging basket programs, small park maintenance, signage and wayfinding, and small capital asset maintenance. A number of Toronto-based BIAs far exceed the norm with spends over $350,000 linked to major park programs and capital works projects.

Placemaking

Of 25 reporting BIAs we found a number of common placemaking traits of an Ontario BIA:

- 75% have a significant stock of properties that either heritage designated or of heritage interest.
- All BIAs reported having multiple transit stops.
- A significant cluster of cultural facilities tend to land within 500m of a BIA.
- BIAs have an average of 4 schools within 500m.
- Significant affordable housing stock is within 500m of a BIA.
- An average of 10 churches fall within 500m of BIA.

These assets speak to the community that is regularly coming and going from the area within 500m of its boundaries, and how the BIA is likely acting as a social, economic and cultural hub for this area.

When we combine this information with that gathered on the effectiveness of relationships managed by the BIAs, we see significant gaps in their skill set. With some relationships being **rated as low at 19% effective,** addressing the disconnect will significantly affect a BIA's ability to play a positive role in placemaking.

ECONOMIC DEVELOPMENT

EMPLOYMENT

BIAs have an incredible ability to drive employment. From a sample of 162 BIAs across the province, we find BIAs that can both **attract employees** to an area increasing the daytime population by over 800%, to BIAs that **account for a significant proportion of the jobs in a community (ranging from 0.2:1 to 0.9:1).**

The **greatest average daytime employment shift** (the increase from residential population to daytime employment population) occurs in BIAs in municipalities with a population of **100,000 to 500,000,** where the average shift is a **177% increase.**

BUILDING PERMITS

BIAs are epicentres for commercial and residential building permit activity. From 2011 to 2016, the value of building permits in reporting communities increased by a value of 263% (commercial) and 228% (residential), while the number of permits remained relatively stable.

NEW BUSINESS OPENINGS

Small to Media Enterprises (SME) are the lifeblood of the Canadian economy. BIAs across the province are becoming homes to start-ups, with an average of 6% of their membership representing new businesses. The strongest performers in new business are BIAs within communities between 500,000 to 1M population, who are hosting on average 17 new businesses per year.

ASSESSED PROPERTY VALUE

Of 30 reporting BIAs, the **average assessed value was $216,428,280.** In communities with a population between 100,000 to 500,000, this value was 25% higher than the average, whereas in communities between 500,000 and 1M in population, the value was 125% below average.

BUSINESS MIX

Non-Retail Anchors

Regardless of the size of the community or BIA, staff feel that cultural **properties and signature natural elements (major park, body of water, etc.) are the best assets for attracting a critical mass** to their BIA. Despite this power, **cultural properties only make up, on average, 1% of the business mix in BIAs**, with communities between 500,000 to 1M (5%) and 25,000 to 100,000 (6%) having the greatest representation.

BIA staff also rated the **effectiveness of their relationships with the Arts & Culture Sector at only 56%**, signalling there needs to be greater BIA collaboration with this sector.

Business Mix

With a custom-built data set of 112 BIAs, the data gathered on Business Mix is one of the most confident data-sets. From this data, we clearly see that BIAs are primarily comprised of five North American Industry Classification System (NAICS) codes: **Retail Trade (25%), Other Services (19%), Accommodation and Food (18%), Health Care & Social Services (9%) and Professional, Scientific and Technical Services (7%)**. All other NAICS fall under 3%, with the vast majority having none.

In this data-set, we also see a clear difference between urban and rural BIAs as the composition shifts significantly with rural communities (pop. 25,000 – 100,000) including 6 NAICs codes not seen in larger cities (500,000 – 1M), as well as significant increases in Arts, Entertainment & Recreation, Finance & Insurance, Real Estate categories, and decreases in Retail Trade and Other Services. This reflects the notion that rural BIAs often serve as the primary downtown shopping and service district for the community, instead of having niche or industry-specific areas in other parts of the community.

BIA ZONE OF INFLUENCE

Housing Prices in the Surrounding Area

Gauging whether a BIA has influence beyond its commercial borders is extremely important in understanding its impact. Based on Real Estate Board data representing 29 BIAs, we found that the cost of **a single-family home and a condominium within 500m of the BIA rose on average 46% between 2011 and 2016**. Within this group we also see a wide range of values with some communities seeing **5-year rates of change as high as 300% and as low as 28%**. Further analysis with a larger and more diverse set of BIAs, and data from the larger city in which they sit would reveal valuable information.

SUPPORT LOCAL BUSINESS

BUSINESS RESILIENCY

Vacancy

Vacancy, especially prolonged vacancy, has an adverse effect on the vibrancy and viability of a commercial district. Based on data provided by BIA staff, on average there were **11.7 vacancies per BIA on an annual basis**. This figure is significantly raised in communities with a population of **100,000 – 500,000 population, having an average of 21.6 vacancies per year**.

CUSTOMER DRAW POTENTIAL

Chains

Chains, a corporation with 4 or more locations, can play a wide range of roles in a BIA. Professional services or financial chains, such as bank branches or national accounting firms, can bring quality services and high quality employment. While fast food restaurants or big box stores can bring unfair competition or detractors for other small business development. **On average, chains make up 7% of BIA membership in Ontario, with cities 100,000 to 500,000 in population reaching as high as 12%**.

Things to do

Understanding the factors that drive visitation to a BIA beyond the retail experience is vital to understanding the mix of assets that make a vibrant and engaging environment. Both within a 500m and 2km radius of the BIA, public parks, places of worship and public art reveal themselves as the most prevalent assets. **On average a BIA has 10 places of worship, 12 public parks, and two cultural facilities within 500m of the BIA** -making them prime civic spaces for public engagement.

COMMUNITY BUILDING

STRATEGIC PLAN REVIEW

A significant aim of this project is to assist BIAs in being strategic about their operations and investments, so understanding their current practice with respect to strategic planning is important. Based on 47 BIA staffs' responses, we found that **40% of BIAs review their strategic plan annually, and that 76% review their plan within 1-5 years**.

MUNICIPAL CAPACITY BUILDING

Municipal Collaboration

84% of BIA staff rate their **level of collaboration with their Municipal partners between 7-10 (10 being excellent)**. BIA staff are working with a range of upwards of 15 different departments, with the vast majority focused on Economic Development, and Tourism & Culture.

Additionally, data was gathered on the effectiveness of the relationships between BIA staff and municipal staff. The data shows us that while 97% report having a relationship with municipal staff, they **only rate the effectiveness of these relationships at 81%**. This sense of diminished effectiveness was common across all relationships we asked Managers to rate, and the gap in effectiveness was low for municipal partnerships versus other community partnerships.

Number of Events Held in BIA

Events are a major component of BIA programming with the intention of drawing in visitors, driving publicity and creating a sense of attachment to their geographic area. It is estimated that **BIAs produce upwards of 1200 events each year, and another 1300 produced by other community organizations** land within the BIA.

This volume is significant as it represents a large part of a BIA's workload and a major contribution to the cultural fabric of the community. From an economic development lens, these events attract significant spending.

SAFE ENVIRONMENT

Crime Statistics

Crime is a challenging metric as crime rates and the perception of crime can tell equally challenging stories. This project gathered some interesting data on crime but acknowledges that perception of crime remains an important gap. Of the BIAs surveyed, **60% have at least one policing centre within 500m** – making a relationship with crime enforcement personnel a regular occurrence. We also found that **30% of crime within a BIA was theft and shoplifting, 24% was alcohol or quality of life related, and 14% was considered violent crime**.

BIA DIVERSITY: RURAL AND URBAN

From the onset of this project BIA staff, OBIAA Leadership and the Advisory Committee members have all been clear in articulating that there is a diverse range of BIAs across the province. From major urban centres to small towns, industrial BIAs to niche shopping districts, up and coming neighbourhoods to those struggling with larger social issues – there is no one definition of a BIA. Acknowledgement of this fact and a careful attention to steer away from setting benchmarks or ranking BIAs against one another has been at the forefront of our analysis.

One of the more common conversations on this topic led to a desire to understand how urban and rural BIAs perform differently, or what factors exist in their environments that enable or encourage them to do so. While this wasn't a focus of our data gathering, to uncover this divide, there are a number of indicators that hold rich enough data for us to present a few areas where we see trends.

For the purposes of this exercise we will be extracting data on communities with a population of 100,000 or less, and comparing it to the more general findings of BIAs across the province.

Based on these population divisions there are two vital indicators, employment and business mix, where we have enough representation from rural BIAs to draw some comparisons.

EMPLOYMENT

Employment is an indicator where we heard considerable concern from smaller BIAs when considering how they would stack up against larger city BIAs. Instead of focusing on the total jobs present, one should really look at the ability of the BIA to drive employment as a percentage of the local economy and the value of those jobs. Below we review ways to look at a BIAs capacity for job creation and value.

Percentage Shift

This figure speaks to the BIAs ability to attract working population during the day. As one can see from the figures below larger urban centres drive approximately 26% more jobs to their BIAs than rural communities, but rural community BIAs still perform incredibly well at 128% increased population during working hours.

RATE OF INCREASE	POPULATION
128%	Under 100,000
157%	100,000 - 1,000,000
154%	Over 1,000,000

Percentage Working

Understanding the percentage of the population during those peak times that are working versus residential is also key to understanding population shifts and employment. As one can see rural communities are attracting a comparable percentage of working population during peak day time hours.

PERCENTAGE WORKING	POPULATION
50%	Under 100,000
57%	100,000 - 1,000,000
51%	Over 1,000,000

Jobs Per Capita

Finally we consider the ratio of employment within the BIA to the population of the host community. Here we can see rural communities having a completely different effect than larger city BIAs. In rural BIAs we see the BIA account for 1 in 5 jobs in the community, where in larger cities the rate falls to 1 in 100.

JOB/POPULATION RATIO	POPULATION
.2:1	Under 100,000
.03:1	100,000 - 1,000,000
.01:1	Over 1,000,000

BUSINESS MIX

As shown in the chart below the typical business mix in a rural BIA versus an urban BIA highlights the reality that rural BIAs are home to a broader mix of business types than in urban centres. Highlighted in blue are 6 NAICS code sectors that only show up in rural BIAs, while highlighted in grey are two sectors where urban BIAs have a significantly higher percentage representation including retail and other services.

SECTOR BY NAICS	UNDER 100K	OVER 100K
Accommodation and Food services	14%	19%
Administrative and support, waste management and remediation services	0%	0%
Agriculture, forestry, fishing and hunting	1%	0%
Arts, entertainment and recreation	5%	4%
Construction	1%	0%
Educational Services	2%	0%
Finance and Insurance	9%	5%
Health care and social assistance	9%	12%
Information and cultural industries	2%	3%
Management of companies and enterprises	0%	0%
Manufacturing	2%	0%
Mining, quarrying, and oil and gas extraction	2%	0%
Other services (except public administration)	18%	25%
Professional, scientific and technical services	5%	4%
Public Administration	3%	1%
Real estate and rental and leasing	6%	2%
Retail trade	19%	24%
Transportation and Warehousing	1%	0%
Utilities	0%	0%
Wholesale Trade	0%	0%

USING DATA TO WIN TRUST WITH KEY PARTNERSHIP GROUPS

Type of Data Collected

Community engagement and economic impact study data (employment, business mix, zone of influence, among others).

How It Is Being Collected

Number of meetings attended and group affiliations.

The Results

Convincing potential partners that a BIA should be at the table to participate in economic development programs was initially difficult. The BIA had to commit to showing up to the meetings and become a valued contributor to discussions. The BIA committed to gathering invaluable baseline data on our business community that demonstrated that the BIA was making a successful contribution to the area. The BIA invested, through the use of municipal grant monies, in a thorough economic impact study that showed the economic value of the BIA area. The report illustrated the increased productivity of the area compared to other areas.

How It Has Made a Difference

Through time and initial success, the BIA has gained the trust and cooperation of other key partnership groups including Chambers, and Economic Development Partners.

UNDERSTANDING THE VALUE OF MARKETING INVESTMENTS

Type of Data Collected

Marketing

How It Is Being Collected

Amount of money invested in branding, website, and social media presence.

The Results

The BIA needed to invest in a great website and social media platform at inception, and it has to support the brand image to secure potential partners and to be taken seriously by potential partners. The BIA needed to look like the organization it wanted to be in the future, not the BIA it was when we started.

How It Has Made a Difference

When potential investors looked at the BIA they gave the impression that they were serious about economic development and being positive contributors.

BUILDING THE INDICATOR METRICS

Developing a membership toolkit to empower BIAs to collect data in a consistent and measurable way is paramount to the success of this work. While this study starts to create that toolkit, more work is needed in the future.

Trends over time will demonstrate why BIAs are of value to commercial districts across the province, but trends can only be established through analysis of consistent data.

This project has identified a number of data collection tools to help the membership and municipalities provide indicator data. Some of these tools already exist, some need to be augmented to provide information to address certain indicators, and some are brand new. A handbook for BIAs on these tools and their relationship to each indicator should be developed to equip BIAs with easy to use collection measures and help outline the emerging and critical role of data in their daily practice.

INDICATOR	DATA CAPTURE TOOL	BENEFIT	INITIATIVE
Building Permits BIA Boundary Changes	Initiate Changes to MMAH's Financial Information Report (FIR).	Already a requirement for municipalities. Mandates the provision of information to the province. Ensures consistent response from all municipalities across Ontario. Known process.	Provincial
Multiple indicators - various	Initiate Changes to annual OBIAA/TABIA membership forms.	Already a requirement for BIAs. Mandates the provision of information to OBIAA. Known process.	OBIAA/TABIA
Business Mix Municipal capacity building Community capacity building Yearly Strategic Plan review Business Resiliency	Create Standardized questions for annual membership survey or data portal.	Allows for the development of trends over time.	OBIAA/TABIA
Sales (local trend line)	Create Standardized questions for quarterly membership survey.	**Sales Tracking Tool Development:** Quarterly membership reporting through an online survey or data portal which allows members to state whether sales values are higher or lower than the previous quarter or the previous year building a trend line over time	OBIAA/TABIA
Sales (BIA average)	Establish a BIA sales index by tracking sales (or reported sales average) of common good.	**Sales Tracking Tool Development:** Select a common denominator good that would likely be situated within BIAs across the province. This common good should be determined through more rigorous analysis, but for example a business such as a Tim Horton's or Subway or a convenience store. OBIAA would Index this sales trend to reflect a BIA average trend line over time, to represent the health of our downtowns and main streets.	OBIAA/TABIA

Employment Gross Leasable Area Assessment Value Building Permits Placemaking Foundational census information	Compile / Create Shape Files for each BIA in Ontario.	Compile/create a digital shape file for each BIA within the province to allow for the creation of unique data sets based on real BIA geography. This work would use existing open data information available through some municipalities, as well as provincial and federal data (Statistics Canada, Revenue Canada, OMAFRA, MPAC) through ministry partnerships. The work to compile digital shape files has already commenced through this study, but should be continued in order to provide a comprehensive set for OBIAA and member BIAs to use in future.	Institutional / Commercial partner
Pedestrian Counts	Expand use of Digital Pedestrian Counter.	This study recommends that OBIAA/TABIA work with the province to identify the appropriate funding mechanism to allow all BIAs in Ontario greater access to a digital pedestrian counter.	OBIAA/TABIA
Dwell Time Event Attendance	Encourage provision of free public Wi-Fi technology within BIA boundaries.	The project team would anticipate that this data will be very easy to capture in the future through Google analytics, cell phone ping data, and the use of Wi-Fi signal tracking.	OBIAA/TABIA in partnership with municipalities
Conversion Rate Placemaking Metrics Quality-of-Life	Create standardized questions for quarterly visitor and resident intercept survey (in person).	Establishing a clear tool for BIAs to capture consistent quantitative data on quality of life in a BIA will important moving forward. Questions such as “Have you been’ here before? How often do you come?” “Why do you visit?” “What makes you want to stay?” may go a long way to start to establish simple metrics around conversion and placemaking.	OBIAA/TABIA

FUNDING CRITICAL DATA

In order for BIAs to track some of the critical metrics which help define their Return on Investment, funding support is needed. This project has identified a select group of indicators which are attainable but at a cost.

In particular, MPAC assessment data has been identified as an important indicator of economic development, given its consistent method of collection and capture across the province. This information is available through MPAC, but at a significant cost. Future analysis of these property value trends within BIAs is possible with funding assistance.

INDICATOR	FUNDING TOOLS	BENEFIT	INITIATIVE
Multiple indicators Unique MPAC assessment data sets. Unique employment data sets (STATS CAN) Unique sales data sets through the use of HST/PST values	Provincial funding through grant monies or transfer payment agreement.	Ongoing data collection and toolkit to build capacity amongst the membership. Compiled shape files of BIA geography would allow for the creation of accurate unique BIA centric data sets provided at consistent times, in a reliable analysis format from MPAC, Statistics Canada and Revenue Canada. Funding the translation of this report into French would allow OBIAA share the BIA story across Canada.	Provincial
Digital Pedestrian Counter	Affinity program creation, bulk discounts.	Most reliable, hassle free solution to measuring pedestrian counts.	OBIAA/TABIA

BUILDING A DATABASE

One of the biggest challenges to establishing the state of Ontario BIAs was in locating the indicator data. Given BIA interest spans across multiple provincial ministries and municipal departments, the data required to depict their Return on Investment was never kept in the same place. An enormous amount of time was required to compile the data sets presented here, and an enormous amount of time would be required to continue to collect the information through the same channels. The barriers to data collection were valid and varied.

At the federal and provincial level, data sets were unable to be refined to a BIA geography without the use of digital shape files, which in many cases don't exist for BIAs across the province. At the municipal level, data was often housed in various departments and required extraordinary efforts to compile into one place. In addition to that, data in some cases was confidential, was collected in a variety of formats, or there was a reluctance to share given concern of broad province-wide comparison. Institutional partners in some cases offered access to good data, but it was often available at a cost or not tailored to the specific geography needed. At a membership level data sources, method of collection, and access was varied, resulting in inconsistencies and challenges in providing comprehensive analysis on certain indicators. In order for data to continue to be gathered and easily accessed, a central data portal should be created.

The data portal would provide substantial improvements to both data entry by the membership and municipalities, and data availability for all. The host of this data portal should be explored through ongoing discussions with OBIAA and TABIA. A partnership between OBIAA/TABIA and government ministries and/or a larger umbrella group such as the Ontario Chamber of Commerce or Institutional partner should be considered.

A centralized data portal, whether housed with the province, an arms-length agency, or under the OBIAA umbrella, would provide unfettered access to the qualifiers of how BIAs are impacting local communities.

INDICATOR	DATA STORAGE TOOLS	BENEFIT	INITIATIVE
All	Establish strategy and repository for data capture with OBIAA/TABIA. Potential for web-based platform.	Ease of Access for users and analysts. Removes stress around paper trail. Consistent with governments open data initiative.	OBIAA/TABIA
All	Gain access to provincial and municipal Open Data Portals.	Improves data access.	Provincial
All	Consider partnership with Chamber of Commerce for central data hub.	Alleviates some capacity challenges for OBIAA/TABIA to manage data resource over time. Connects BIAs with municipalities through data. Encourages improved partnerships.	OBIAA/TABIA with the province
All	Consider partnership with academic institution for central data hub.	Alleviates some capacity challenges for OBIAA/TABIA to manage data resource over time. Builds awareness of BIA work through university network. Capitalize on research capacity available in house.	OBIAA/TABIA with the province

FOR BIAS AND THEIR MEMBERS

Each BIA should be recognized as unique and should not be forced into one-size-fits-all approach. This project aims to provide each BIA with the tools needed to share their story, and their success, without attempting to sterilize the unique nature of each business district. With that, there are still common threads of success regardless of a BIA's own competitive positioning, it is the consistent measurement of these threads that will build a collective understanding of the role BIAs are playing across the province. These threads include measuring tangible signs such as business resiliency including vacancy, business longevity, and business mix.

One of the key priorities of this study is to increase membership capacity. In order to do so the Study provides clear metrics and tools to empower BIAs to share their story. Knowledge is the foundation of this priority. One of the challenges revealed through this study is the discrepancy between the BIA membership and municipalities on the role of the BIA. This is not surprising, and reflects the reality of a wide spectrum of BIA practice on the ground. Where some BIAs are focused on streetscape beautification and events others work extends far beyond the mandated role under the Municipal Act.

This report raises awareness of the wide spectrum of practice through data findings and embodies it through the agreed set of indicators which have been determined to reflect all components of BIA practice. Some BIAs see the greater importance of their advocacy, marketing, and facilitator components to create greater economic development and community building within their areas of influence. However, not all BIAs want to actively engage in economic development.

OBIAA and TABIA recognize the variations in scope across the province. Some geographically, economically or politically driven. The evolution of BIAs role in communities across the province. Getting from BIA1.0 to BIA2.0 will require a multitude of factors to help members and municipal partners realize the full value of BIAs influence. This report is a start at providing the tools to assist.

In order to continue to empower the membership to recognize their own potential, OBIAA/TABIA will continue to seek municipal and provincial support through financing, policy, and partnerships.

INDICATOR	EMPOWERING TOOLS	BENEFIT	INITIATIVE
Yearly Review of Strategic Plan	Mandate the completion of a strategic plan annually.	Requires BIAs to think ahead and allows for them to evaluate progress on an annual basis against their own strategic direction. The priorities of each BIA will be different. This toolkit is not suggesting that there is only one path towards improvement of the BIA area. Rather, it is customizable as set out in each BIA's Strategic Plan. The Strategic Plan will guide the business mix, the programming, and community engagement efforts. It is essential to note that community engagement is an over-arching element over all activities and programs carried out by BIAs.	Municipal
Business Mix Business Resiliency Sales	Revise the Small Business Definition with Statistics Canada.	To improve data accuracy when using Statistics Canada information, as current definition qualifies small businesses as having less than 100 employees, which doesn't provide enough insight into the small businesses within a BIA.	Provincial

All	Revise the mandate of BIAs under the Municipal Act s.204	Legislate the BIAs role in improving their unique geography as a place for business and as a community hub. Through changes in the policy language, the province will provide recognition of BIAs potential to influence each of their four major goals: Street Appeal, Economic Development, Supporting Local Business, and Community Building. This role has been assumed to varying degrees across Ontario, but needs government support to continue. An update to the BIA mandate will send a clear direction to municipalities and BIAs that their role is greater than the existing mandate outlines.	Provincial

FOR THE ASSOCIATIONS

OBIAA and TABIA have an important role to play in leading BIA organizations into their next phase of growth. The need exists for them to act as a data house, information source, training hub and advocacy group for their membership and government partners. The background research clearly articulates the need for an umbrella organization such as OBIAA and TABIA to continue to advocate and raise awareness of the role BIAs play in our communities. Without the presence of this type of organization, as shown through the jurisdictional scan, little consensus, and minimal data is readily available to demonstrate the work that BIA staff are doing. The importance of OBIAA/TABIAs role as the umbrella organization to assist municipal champions in the coordination of BIA statistics across all department is evident. The Return on investment project is about creating a foundation for ongoing measurement. It is a capacity building project, and not a report card.

OBIAA/TABIA will continue to work with the province to assess resource needs to ensure mentorship, sponsorship, advocacy, and data management responsibilities can be met.

This report provides a call to action for ongoing data capture to provide evidence based information on BIA work. This in turn will require resources. Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. Developing programs need to have the support of membership. This includes factors such as leadership, staffing, active board members, communication, and active volunteers. The unique work environment of BIAs being both large and small, remote, rural and urban, can lead to challenges in day to day mentorship and sponsorship. OBIAA and TABIA are looking to better address these challenges and support the membership in their own professional development, but must engage both the province and local municipalities in these efforts to ensure success.

INDICATOR	CAPACITY TOOLS	BENEFIT	INITIATIVE
All	Assessing house resource needs at OBIAA and TABIA.	Provide additional human resources to assist in mentoring and training BIA staff on how to measure and share their Return on Investment. Provide additional human resources to assist in data management.	Province to work with OBIAA/TABIA.
All	Development of a BIA Buddy System	Empower BIAs to lead from within. Build capacity within the membership.	OBIAA/TABIA

A BIAs influence is directly linked to the success of their partnerships within government, with the industry, and in some cases connections to local institutions. At present, many of the BIAs with smaller membership sizes (under 200 members) and in smaller communities (under 50,000 people) are more reliant on creating partnerships and having to create better communications vehicles to different audience members to build support compared to larger BIAs. However, it is also true that BIAs that have developed a highly specialized business mix in traditional retail or in food services have also relied heavily on developing a broad range of partnerships through excellent communication on their successes. Partnerships between municipalities and BIAs varied across the province. As a general rule, the stronger the municipal partnership, the greater awareness of the BIAs role in the community, and the greater perceived success.

A closer examination of ways to improve and enhance municipal, provincial and BIA partnerships should follow on from this study.

PROVINCIAL

This report calls for continued multi-ministry partnership with OBIAA to support the foundation of data and metrics formulated through this initiative both on a broad bases and localized scale. The Return on Investment indicators provide BIAs and the small business owners and landowners they represent, a clear set of measurement tools to relay successes and challenges to their memberships, their municipality and the province.

One tool that could be expanded to support this initiative is the Financial Information Report (FIR). In addition, the province has the ability to mandate the provision of data on BIAs from municipalities. This would guarantee a higher return rate of statistics and encourage ongoing collaboration at the municipal level.

The province must take on a leadership role in advocating for good data collection across Ontario.

One suggestion could to require the return of these statistics prior to release of the transfer payment to the municipality and in turn the BIA levy. Collaboration at the provincial level is also needed to share data across various ministries, and make it accessible for analysis. By easing the access to information, the province would reduce a number of barriers for BIAs in Ontario to share their success.

MUNICIPAL

Partnership between municipalities and their local BIAs is one of the most fundamental foundations of success for a BIA. Strong partnership and collaboration between the business community and their municipality drives decision making and positive investments in the commercial area. This project has highlighted that BIAs feel municipal partnerships are both their strength and their weakness, and that opinion varies. across the province. Given the unique legislative relationship BIAs hold with their municipality, these organizations are well-placed to join forces and drive improvement to our local commercial districts. It is a community loss not to capitalize on the mandated link between the two. BIAs need municipal support, both political and administrative, to advance new initiatives and clear direction.

The province must continue to encourage this connection between municipalities and their BIAs through knowledge sharing and capacity building.

Stronger municipal partnerships between their administration and their BIAs will undoubtedly improve access to data, reduce uncertainty about sharing information, and build mutual trust.

Our work with municipalities throughout the project helped to identify the barriers faced by municipal staff in capturing data of this magnitude. Lack of availability and the dispersed nature of data within each municipality highlighted need for collaboration across departments and the need for a champion internal to the municipality to advocate for its collection on an annual basis.

INSTITUTIONAL

Barriers in data collection and analysis could be addressed through direct partnership with institutions at a provincial or association level. There is currently institutional capacity to both assemble, analyze and house the data for each indicator of this Study. In addition, some institutions are already in the process of capturing and tracking statistics on relevant indicators, OBIAA/TABIA recognize that where synergies exist between the information they need and the information some universities are already capturing, a partnership opportunity should be explored. Ryerson University's Centre for Retail and Commercial Studies, McMaster's Department of Geography and Queens University's new Centre for Commercial Analysis are all research bodies focused on a number of the indicators identified through this study.

The province should consider ongoing support, both strategic and financial, for the creation of this partnership at a province-wide level.

OBIAA/TABIA would like to work with a preferred institution to create a research hub for Small Business and Business Improvement Areas in the future. An institutional partnership could mean that the data base of indicator statistics is housed in an institutional body, with agreements in place for OBIAA/TABIA access.

COMMERCIAL

Private Sector partnerships offer BIAs an opportunity to leverage additional knowledge, market share and in some cases financial support to assist them in day to day function. While some strong partnerships with private sector firms exist on an individual BIA level, these could be further explored to see what opportunities are available on a broader scale. Improving private sector partnerships provides the opportunity to improve access to data, provide consistent measurement tools, and increase budgets for broad marketing campaigns and BIA awareness.

BIAs are in a unique position compared to counterpart public boards, having well established existing relationships through the business community, and a legislated mechanism to engage with business community as a BIA member. Commercial business partnerships can improve capacity through the provision of new data, additional funding opportunities, and the tools to allow BIAs to collect data on their own.

OBIAA/TABIA will work with the province to identify key private sector partnerships to explore in the provision of data metrics and tools at a province wide level, and encourage the ongoing development of partnerships between BIAs and commercial enterprise on the ground.

As the home of the world's first Business Improvement Association, the Ontario BIA Association has a responsibility to be a knowledge leader and instill a clear understanding of the role BIAs play in our local communities. The Return on Investment project sets the foundation for that communication.

Communications will play a vital role in the ongoing success of the project, from keeping members and stakeholders engaged and excited to providing the key mechanisms for encouraging collection and gathering of data. A long-range communications plan is being currently developed to support this initiative as the future unfolds, and will cover elements including but not limited to:

1. Intent and goals
2. Audiences
3. Main narratives
4. High-level and audience-specific messages
5. Media and vehicles
6. Informative communications
7. Data gather communications
8. Communications partners
9. Schedules and timing
10. Resources required
11. Measurement

Bilingual reporting was identified throughout the projects consultation as an important piece of the puzzle to building awareness and acknowledgement of BIA work across Canada. Funding to share these findings will continue to position Ontario as a leader in the development of BIA practice. While bilingual reporting and translation sits outside the scope of this report, consensus around the need to support bilingual BIAs in Canada and recognize their own unique economic resiliency through their ability to operate in two languages is clear.

Project participants noted potential grants and programs to help in translation services, or a digital application that may be used to assist. Further investigation into the appropriate mechanism for translation should be explored.

The Province should support OBIAA/TABIA in the translation of this Return on Investment report and consideration for ongoing communications and knowledge sharing across Canada.

BIAs cited member engagement as one of the top successes for BIA organization, yet the Project team encountered a consultation process that required innovative engagement skills to encourage participation. Divergence on the approach and uptake on engagement with both BIAs and their membership was evident throughout the project as evident in the finding. The same can be said for municipalities.

A three-prong engagement strategy to facilitate increased awareness and consistent involvement from BIAs, their municipalities and their membership moving forward will build capacity within the BIA field over time.

INDICATOR	KNOWLEDGE SHARING TOOLS	BENEFIT	INITIATIVE
All	Translation of findings into French (services/digital app)	Funding the translation of this report into French would allow OBIAA to share the BIA story across Canada. Bilingual reporting was identified throughout the projects consultation as an important piece of the puzzle to building awareness and acknowledgement of BIA work across Canada.	OBIAA/TABIA
All	Three-prong approach to ongoing communication. Includes the use of surveys, a data portal, workshop training, and face-to-face communications.	It will facilitate increased awareness and consistent involvement from BIAs in both the data gathering and reporting required for this study and their work at a local level. It will improve understanding of the BIAs' role with municipalities. It will help empower BIA members with information to clearly demonstrate their Return on Investment. It will ensure a collaborative approach across the province and tie BIA work to broader provincial initiatives over the long term.	OBIAA/TABIA

NEXT STEPS: DEMONSTRATING RETURN ON INVESTMENT

One of the primary goals of this study was to determine the return on investment of a BIA. Not only to provide the province with a clearer picture of what BIA legislation has facilitated on the ground, but to allow BIA organizations the ability to share their success through evidence-based data metrics.

The work completed in this study to date provides a snapshot of their influence, and clarity around the indicators needed to share the wide variety of successes and challenges faced by BIAs across the province. Both positive outcomes, but only the first step in creating a clear set of measurements tools to demonstrate BIA influence over time. The next is to provide BIAs with some clear tools to showcase these indicators. It is one thing to know how many building permits happen within a BIA boundary, and another to understand how to use that data to share your Return on Investment.

The project team and Advisory Committee through this study, looked not only at the tools needed to capture data, but also the tools needed to share it and demonstrate Return on Investment. While this work must continue, the project has started with the creation of a set of four (4) key tools representing each goal of a BIA. These, along with further ROI tools should continue to be enhanced through ongoing work.

Below you will find each of the four (4) ROI tools listed against their relevant BIA goal. Training around the use of these tools and the data metrics behind them will be required by OBIAA/TABIA.

GOAL	ROI TOOLS	BENEFIT	INITIATIVE
Street Appeal	Asset Mapping: • Aerial image • Asset mark up	Provides a visual tool for BIAs and municipalities to understanding existing assets (both physical and social) within the BIA area. For example, a map that populates total number of Street Benches, lampposts, garbage cans, should be combined with statistics on public art, parkettes, natural features, places of worship, and key businesses – to provide a full picture of the assets of that district. Determination of assets can be completed by the Board of Management or through a membership survey, and supplemented by municipal infrastructure data. This sort of tool could be kept up by the BIA executive and shared with government partners and the broader membership to show ROI.	BIA members
Economic Development	Gross District Product, using: • Sales (HST) • Employment • Land area	Provides a simple ROI measure of the relative impact of the BIA area on sales/employment/building permits on a per square foot basis. Allows for comparable metric to other geographies, the city as a whole or other commercial areas.	OBIAA/TABIA in partnership with members

Supporting Local Business	Sales Index, using: • Common good/ commercial land use sales tracking across the province.	Select a common denominator good that would likely be situated within BIAs across the province. This common good should be determined through more rigorous analysis, but for example a business such as a Tim Horton's or Subway or a convenience store. OBIAA would Index this sales trend to reflect a BIA average trend line over time, to represent the health of our downtowns and main streets. The index could be added to OBIAA or local BIA communications with their members to show a trend line built over time. It should be noted that this is one of a couple of sales tools contemplated over the course of the study. The Index is meant to provide trending on sales at a broader scale, to which local BIAs and their membership could compare their own sales figures. It would provide an index of overall health of BIAs.	OBIAA/TABIA in partnership with province.
Community Building	Network Mapping: • Municipal capacity building • Local capacity building • Safe environment	Similar to an asset map, this tool provides a visual depiction of the networks created through the work of the BIA. An important role of the BIA is to act as an advocate and connector both internal to the organization and with external stakeholders. While anecdotally we know of many connections made through BIA effort, a visual map of key relationships would solidify the influence BIAs specifically have in furthering the position of small business, main streets, and downtowns in the broader civic conservations. This map would look much like a web – with the BIA at the centre, and various network connections branching off of it. I.e. Municipal departments, community associations, key industry leaders, special advocacy groups. Not-for profits, key event holders, etc. This sort of tool could be kept up by the BIA executive and shared with government partners and the broader membership to show ROI.	BIA members

USING DATA TO TARGET STREETSCAPE INVESTMENTS

Type of Data Collected

Placemaking

How It Is Being Collected

Amount of money invested streetscape, targeted investment.

The Results

The BIA had to convince the City to take their limited dollars and instead of spreading them out everywhere and not making an impact, the BIA and the City worked collaboratively to concentrate the expenditure and spend it where pedestrians are walking the most.

How It Has Made a Difference

BIA was able to focus investment on the highest use rather than the widest span.

COLLECTING PEDESTRIAN COUNTS TO SUPPORT CAPITAL INVESTMENT

Type of Data Collected

Socio-economic information on pedestrian counts.

How It Is Being Collected

Used technology including Wi-Fi app to monitor visitation, pedestrian counts, and gain greater insight into not only where they are walking/shopping but who they are.

The Results

With this type of information, the BIA is able to create greater cross-shopping synergies, and to know where to locate a Farmers' Market, where to locate key anchor businesses with the aim of increasing pedestrian flow.

How It Has Made a Difference

The BIA is using it to influence both private and public sector capital project investment.

The work completed has provided tremendous insight into the breadth and scale of BIA work across Ontario.

The project looked to identify a collective set of indicators for BIAs province-wide to share their work, and quantify their return on investment.

With a series of data capture and sharing tools and a set of recommendations to allow the membership to take ownership of the findings. this work will be the foundation for a shared vision of BIA practice moving forward.

The data available has shown that BIAs are integral to business districts in communities across the province. The work also points to the reality that BIAs are taking on a bigger role than was initially set out for them through the Municipal Act. Not only are they improving their area for business, their efforts on the whole provide economic stimulus, support for local business and entrepreneurs, foster community identity and create personal connections to place.

The BIA organizational model is demonstrating its influence over a district's ability to be distinct, liveable, vibrant and resilient.

The data findings confirmed that collectively BIA geographic areas are experiencing increasingly intense growth pressure. In addition, they are home to many communities' key cultural assets and a hub for new business start-ups, small independent businesses and the majority of the province's daytime working population. Furthermore, BIAs are collaborating extensively with their local municipalities, working with as many as 15 departments at once and focusing on economic development and tourism. Their work with local community groups varies but highlights the network facilitated through the BIA organizational framework.

Municipal Act legislation outlines the role of the BIA to achieve the dual goals of beautification and promotion of their defined geography. This study demonstrates that in many parts of the province, BIAs have pushed the limits of the current legislation to develop more complex organizational models. They have progressed beyond beautification and marketing as mere tactics for improvement, to advancing this work as part of a strategic plan that positions the BIA as a key player in the community to achieve greater growth, prosperity and vibrancy on the whole. As to be expected, this study also lays bare the reality that that there is a wide spectrum of practice among BIAs in Ontario. Many of the small membership BIAs in smaller communities remain focused on the older organizational model, which includes community engagement, block captains and committees comprised of board members. On the other hand, larger membership BIAs are now emerging with a range of organizational responsibilities that include semi-development corporations, additional hired staff devoted to planning and economic development, and/or strategic capabilities to generate different forms of revenue including fundraising, charity status, sponsorships and even property ownership.

This spectrum of practice comes as a result of distinct geographic, financial, political and economic drivers that remain unique to each community and/or BIA. There are obvious and distinct differences between BIAs in rural areas (less than 100,000 people) and urban centres. What remains common is the vehicle of BIA legislation, created by the province and harnessed by the private sector, to drive change within their commercial districts.

Empowering BIA boards of management and executive staff to realize this potential is one of the outcomes of this work. Strengthening the partnership among the province, municipalities, both OBIAA and TABIA and local BIAs will be key to ensuring a knowledge base that can support realizing this potential.

BIAs are well positioned to link planning and economic development policy with implementation, facilitating on the ground improvements to provide employment opportunity, foster innovation, create a sense of community and attract residents and

visitors into commercial districts. Their work not only implements the province's policy mandate, but also helps to advance initiatives, infrastructure, events and community connections above and beyond what municipalities can provide.

The continuation of this project is critical to ensure BIAs across Ontario are equipped with the tools to both capture the data to inform these indicators and to share the findings with their memberships, government partners and the broader community.

As the legislative direction for the creation of a BIA approaches 50-years, we must consider how these organizations and their distinct geography will grow over time. The first 50 years have shown the role of the BIA as a shepherd of change, their work driven by increasing pressure on commercial districts, main streets, industrial areas and downtowns to change their form, function and relevance in Ontario's economic makeup. BIAs historically responded by focusing on the protection and enhancement of their established commercial district, advocating for small business in response to the unique challenges of each community. This role continues today. With the BIAs' ability to respond in specialized ways to local challenges, they cement their integral role in building resilience and guiding their communities as Ontario continues to evolve.

BIAs have demonstrated their role as an integral vehicle for government to ensure efficient use of resources and respond to unique and localized community pressures.

In the next 50 years, we must consider the expanded role that BIAs will need to assume to continue to take on a prominent role in the evolution of our local and provincial economies. The legislation in place must recognize the integral responsibility that BIAs have and should continue to have in order to ensure distinct, livable, vibrant and resilient commercial districts across Ontario.

ONTARIO BUSINESS IMPROVEMENT AREA ASSOCIATION RETURN ON INVESTMENT STUDY

Indicator(s)

1.1.1 Amount of money spent on beautification

Category

Street Appeal

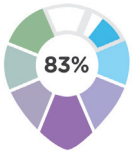
Desired Metric

Amount of money spent within the BIA boundary on beautification projects

Primary Data Source(s)

OBIAA member data + Question of the Week

Confidence Scale



Data credibility:	3
Geographic representation:	3
BIA density:	2
Data relevance:	2

Reporting Communities

41 reporting communities ranging from Toronto to Listowel

With 41 reporting communities in this question, there is a wide range of data related to beautification projects. While the question gave specific examples of how to define “beautification projects,” respondents were also given an open field to describe the nature of the investment, which enables the ability to parse out specific project types and values.

Overall, the group reported $2,915,170 in beautification projects, with an average spend of $69,400 and a median spend of $32,500. Within this total, the data is broken into three categories: beautification, events & marketing, and administration. With this division of categories, approximately $2,450,000 falls in beautification, and the remainder is directed towards events, marketing, and administration.

Two BIAs in Toronto (Financial District and Baby Point Gates) are identified as clear exceptions from the norm across the province reporting $500,000 and $375,000 respectively for significant maintenance programs and a parkette project. Four other BIAs -- Port Credit (2), Kingston, and Kingsville -- report figures over $100,000 linked primarily to planting and landscape maintenance.

The principle expenditures reported include hanging baskets and flower planting (capital and maintenance), landscaping, signage and banners and small-scale wayfinding or capital projects (historic clock maintenance, public art maintenance, etc.).

APPENDIX A:
STREET APPEAL INDICATORS

Indicator(s)

1.1.2 Amount of money leveraged

Category

Street Appeal

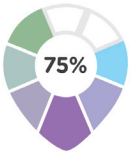
Desired Metric

Total amount of money leveraged to create streetscape improvement within the BIA geography (i.e. sponsorship, grants, municipal funds, etc.)

Primary Data Source(s)

OBIAA annual member statistics, municipal partner reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	1
Data relevance:	3

Reporting Communities

Sudbury, Norfolk County (2), Port Hope, Peterborough, North Bay, Hamilton (13), Ajax

Municipal Partner Data

Within the 20 participating BIAs responding to this indicator, the only strong data received was the number and value of projects linked to municipal façade improvement programs.

In 2011, 55% of the reporting BIAs leveraged façade improvement grants from their municipalities worth $468,314.00, with an average of $24,648 per BIA. These incentives spurred $1,031,503.00 in projects with an average investment ratio of 2.4:1.

In 2016, the same communities reported on $252,076.00 in façade improvement fund, with an average of $12,603.00 per BIA. These incentives spurred a slightly higher ratio of investment at 2.5:1.

In both 2011 and 2016 the investment ratio, and per capita value of the municipal incentives, were significantly higher in smaller communities such as Port Hope and Norfolk County. The investment ratio in these smaller communities reaches a high of 6.6:1, meaning a small investment from the municipality generated a larger project in the private sector than in the larger urban centres. Similarly, looking at the per capita value of the incentives, the smaller communities reached rates of $2.53 per capita, whereas the highest urban centre investment is $0.73 per capita in Hamilton. The average investment is $0.17 per capita.

Indicator(s)

1.1.3 Number of benches, garbage cans, etc.

Desired Metric

Quantity of public realm items within BIA boundary

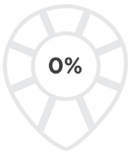
Category

Street Appeal

Primary Data Source(s)

Municipal data reporting

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

None of the partner communities reported on the data request for this indicator.

Indicator(s)

1.1.4 Placemaking metrics

Desired Metric

Quantity of public realm items within BIA boundary related to placemaking

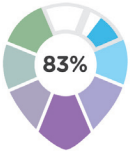
Category

Street Appeal

Primary Data Source(s)

Municipal data reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

Trenton, Port Hope, Peterborough, Ottawa (3), North Bay, Kenora, Hamilton (13), Burlington (2), Barrie, Ajax.

APPENDIX A:
STREET APPEAL INDICATORS

For this indicator, municipalities were asked to report on the presence of 52 asset types (public realm items) within the BIA and within a 500m or 2km radius of the BIA. With a total of 24 reporting BIAs, this data is relatively strong and reveals a number of patterns about the nature of the neighbourhoods that BIAs are embedded in. The full list of assets in the category are listed at the end of this section.

Heritage Buildings – reporting BIAs listed a total of 158 designated heritage properties and an additional 201 listed buildings of heritage interest. With an average of seven heritage properties per BIA, this is a common asset across the reporting group despite 25% reporting no fully designated properties.

Transit Stops – with a total of 630 transit stops within 500m being reported across the group and despite no figures from Hamilton on this specific item, every BIA reported having transit stops. After removing two Ottawa BIAs (Glebe, Heart of Orleans) which had a markedly higher number of transit stops (102, 100) the average number of transit stops within a BIA was still 33. This density of transit infrastructure clearly shows that BIAs are key destinations within a civic landscape.

Public Art – a total of 125 public art works was reported within a 500m radius of the participating BIAs boundaries. This equates to an average of 7 per BIA, with Downtown Burlington, Downtown Hamilton and Peterborough reporting over 20 works within their BIAs. Clearly public art as pedestrian infrastructure is playing a role in these figures (i.e. public art benches, bike racks, etc.).

Cultural Facilities – as strong drivers of traffic for events, the project team looked at cultural facilities (theatres, galleries, museums, etc.) within a 500m and 2km radius. From the reporting communities, the team found 69 within 500m, and 175 within 2km. Only two communities reported having no cultural facilities within 500m of the BIA (one being an industrial BIA), and high of 12 within 500m and 26 within 2km. Clearly BIAs are located in close proximity to cultural centres, and should therefore be working collaboratively with these communities to drive interaction and commerce.

Methadone Dispensary – 41% of BIAs reported having at least one dispensary within the BIA, and an additional 25% reported having at least one within 500m. One BIA, Peterborough, reported having four dispensaries within the BIA boundary.

Bike Lanes – collectively the group reported over 170,000 linear metres of bike lanes throughout their BIAs. While data only came from eight BIAs, their size and geographic representation includes rural communities, major city centres and northern communities. This shows that cycling infrastructure is becoming commonplace throughout the province.

Schools – with an inclusive definition including primary, secondary and post secondary education, BIAs reported over 100 schools within 500m of their boundaries, and over 500 within 2km. Only four reporting BIAs had no schools within 500m. Overall, each BIA has an average of four schools within 500m and as such, the community building opportunity for BIAs through education is significant.

Affordable Housing – with 19 responding BIAs, there is an average of 46 affordable housing facilities within 500m of BIAs, and just shy of 400 within 2km. This makes BIAs a critical hub for residents in affordable housing facilities, and also ensures that there is a mix of housing opportunities within the BIA regardless of market pressures on housing. Only two BIAs reported having no affordable housing in either of the geographies queried.

Places of Worship – with 233 places of worship within a 500m radius of the BIAs reporting and over 900 within 2km, faith-based communities are clearly a significant player in BIAs. This figure illuminates the BIAs' role as a social convenor, cultural hub and place of great meaning for residents. Places of worship can also be a challenging member within a BIA as they draw large crowds during limited hours and don't often have a significant weekday presence.

Arterial Roads / Air Quality – 11 BIAs responded with data about this asset and only one reported having no arterial roads either in the BIA or within 500m. Within 500m of an arterial road the air quality is significantly worse due to vehicle emissions and particulate. This means that 90% of BIAs have compromised air quality due to the nature of the built environment they are situated in.

APPENDIX A: STREET APPEAL INDICATORS

Public Parks – every participating BIA reported at least three public parks within 500m of the BIA, for a total of 325 parks covering over 500 hectares of green space. Within 2km, the numbers are exponentially higher with 1,289 parks covering over 10,000 hectares of green space. This directly combats the arterial road air quality issue noted above, and further illustrates how BIAs are situated in prime neighbourhoods designed for social engagement, interaction and healthy-living.

Full List of Placemaking Indicators

- Lamp posts
- Designated heritage buildings
- Listed heritage buildings
- Transit stops with structures; transit stops without structures
- Public parks
- Hectares of park land
- Public art
- Cultural facilities
- Farmers' markets
- Daycares
- Municipal recreation facilities
- Sports facilities
- Policing centres
- Hospitals
- AODA cross walks
- Methadone clinics
- Meters of bike lanes
- Seniors centres
- Schools
- Affordable housing
- Community hubs
- Places of worship
- Arterial roads
- Outdoor patios
- Public squares
- Early learning centres
- Existence of CIP
- Average vehicle speed limit

Indicator(s)

1.1.5 Public realm completion rate

Desired Metric

Number of and completion rate of public realm projects within BIA boundary

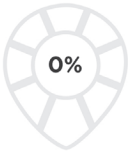
Category

Street Appeal

Primary Data Source(s)

Municipal data reporting

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

No BIAs or municipalities reported on this indicator and it has been identified as a data gap.

Indicator(s)

1.2.1 Actual event attendance

Desired Metric

Number of people visiting BIA specifically for public events

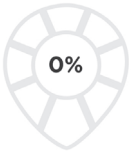
Category

Street Appeal – Experience

Primary Data Source(s)

Municipal reporting

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The project could not identify any existing data sources for this indicator.

Indicator(s)

1.2.4 Conversion rate

Desired Metric

Event / Promotion visitors converted to regular BIA visitors

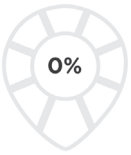
Category

Street Appeal – Experience

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

APPENDIX A: STREET APPEAL INDICATORS

Why It Matters

This indicator is beneficial to both economic development municipal staff, local BIA administration and their membership in understanding why people visit the business district and gain insight into their motivations.

Data Needed

- Qualitative and quantitative
- Number of people that have repeatedly visited the BIA
- Number of people that have converted from a visitor to a customer (spent money in the BIA)
- Perception of why people visit.

Data Gap Identified

The challenge with this data is that it must be delivered and captured in a consistent way across all BIAs, and while there are a number of examples of BIAs attempting their own way of tracking conversion, consistency is limited.

Where loyalty cards may offer a solution that provides some level of consistency, creating a customized loyalty program would need significant buy-in from BIAs, and OBIAA does not have the resources to administer a loyalty program at present. This project has also identified that loyalty programs are considered risky and costly to manage by some members, where the risk of redemption is high and therefore results may be negatively skewed. There are also affinity concerns for OBIAA to offer only something that is unique. It may put OBIAA in a situation where they are competing against their own members.

Electronic gift cards have also been used in various BIAs, but are costly programs to encourage members to engage in, as they charge retailers 8%. The findings also only reflect a sub set of the market as a whole, rather than the complete picture.

Shop the Neighbourhood, a program administered by Yellow Pages and funded through the Province had started to establish some broad metrics on conversion, but that program has been discontinued.

On the whole, capacity of both the OBIAA/TABIA administration and BIA members is challenged to be able to implement any sort of tracking on conversion in a consistent way.

Filling the Gap

Alternatives were considered:

- Loyalty card program, if OBIAA participates they would access to the data.
- Electronic gift cards which would provide each BIA with access to the information.
- Cell phone ping data providers.
- Intercept surveys.
- Apps that allow sharing of analytics with the BIA.
- Moneris or ATM data.
- Shop the Neighbourhood program is discontinued under new management.

Recommendations

This study recommends a series of actions to enable BIAs to capture their Conversion Rate Indicator:

- OBIAA/TABIA to create a tool to allow BIA members to easily initiate intercept surveys. Questions such as “Have you been here before? How often do you come?” may go a long way to start to establish simple metrics around conversion. These survey results could then be reported back to OBIAA/TABIA annually or input into a data portal. The key will be to provide a consistent set of questions for the survey, and ensure each BIA and OBIAA have the capacity to implement and track.

APPENDIX A: STREET APPEAL INDICATORS

Indicator(s)

1.2.6 Average dwell time in a BIA

Desired Metric

Duration of an average visit to a BIA

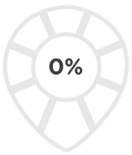
Category

Street Appeal – Experience

Primary Data Source(s)

SiteWise – daytime population data

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

This indicator provides important information for event planning, parking utilization and ongoing parking requirements. It also allows municipalities and BIAs to be able to track the benefit of public assets such as investment in a public market to see those who visited the market and then created a catalyst by visiting other businesses in the BIA.

Data Needed

- Parking utilization data
- Cell phone ping data
- Wi-Fi data within the BIA

Data Gap Identified

Gaps exist in all of the potential data sources. Data capture requires substantial amounts of work to create the full picture.

- Parking information is only applicable for BIAs that have paid parking enforcement, which isn't consistent across the province.
- Difficulty separating people that are loitering in the BIA from those in the BIA who would contribute to the financial success.
- Cash parking meters will not provide time of day statistics.

Filling the Gap

Alternatives for determining average dwell time were considered:

- Free Wi-Fi hosted by BIA. Requires the continued support for infrastructure to allow for free Wi-Fi in their BIA areas. Highlights the importance of strong Wi-Fi technology, and wi-fi friendly zones.
- Cell phone ping data. Working with company cell phone providers and getting information through these networks.

Recommendation

The project team would anticipate that this data will be very easy to capture in the future through Google analytics and the use of Wi-Fi signal tracking. This study recommends continued encouragement of Wi-Fi technology and the appropriate infrastructure in BIA areas to allow for increased public usage.

APPENDIX A: STREET APPEAL INDICATORS

Indicator(s)

1.2.7 Quality-of-life metrics

Desired Metric

Asset mapping related to quality-of-life

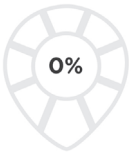
Category

Street Appeal – Experience

Primary Data Source(s)

Municipal reporting

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

This indicator is critical to provide a snapshot of the vibrancy and perception of a range of things within an area. Knowledge of this metric will let neighbourhoods and BIAs make more informed decisions about new buildings, business mix, and future public realm investments with accuracy. The quality-of-life Indicator was meant to be an amalgamation of a number of indicators to create OBIAA's own narrative on quality-of-life. Based on the information returned, there was data within the following indicators that can be utilized to form this narrative:

1.1.1 Amount of money spent on beautification
1.1.4 Placemaking metrics
2.0.1 Employment
2.0.12 Business Mix
3.2.3 Things to Do
4.2.8 Crime Statistics

Data Needed

Primarily focused on physical/tangible assets rather than human conditions (e.g., births, deaths, education levels, etc.) and not at affordability measures. Also reliant on both quantitative and qualitative information. Range of data including: heritage features, street amenities, Wi-Fi, beautification, public art, gateway, proximity to grocery stores, enhanced signage, parkland, education facilities, arts and culture, sports and recreation, etc.

Data Gap Identified

One of the largest gaps in creating a well-rounded quality-of-life score is the lack of qualitative data. Establishing a clear tool for BIAs to capture consistent quantitative data on this quality-of-life in a BIA will be important moving forward.

Establishment of this metric has been reliant on the data received from municipalities. Receipt of this data throughout the project has been patchy, resulting in inconsistent findings.

The other barrier to this category is not overloading but narrowing down metrics to key ones that are essential for a customized BIA quality-of-life measurement.

Filling the Gap

Alternatives to determining quality-of-life were considered:

- Municipal data collection based on existing measures, surveys through the municipality.
- Direct relationship between OBIAA/TABIA and specific agencies and ministries that house this information to avoid limitations of municipal data sharing.
- Surveys to the membership with specific qualitative questions could be completed
- Intercept surveys for visitors within the BIA area could also be completed.

In addition, an important component of this metric is the ability to manage large amounts of raw data, cross compare and derive unique BIA centric results.

Recommendation

This study recommends a series of actions to enable BIAs to capture the needed components of a BIAs' quality-of-life indicator:

- Missing crime data could be addressed through enhancing a BIA's relationship with agencies and emergency services.
- Province-wide standardized reporting of crime data on the whole is needed as the information gathered through this study highlights inconsistencies across the province.
- OBIAA/TABIA to create a standardized survey tool to allow BIAs to complete visitor intercept surveys and local resident surveys to inform the qualitative component of the indicator.
- A data portal needed to house the range of information that this metric requires. Whether that portal exists at a provincial/municipal or association level is to be determined. Providing the option of direct input of the data online would no doubt ensure more timely responses and greater uptake.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.1 Employment statistics

Desired Metric

Number of people employed with BIA boundary

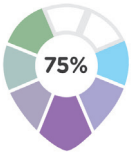
Category

Economic Development

Primary Data Source(s)

SiteWise – Environics daytime population

Confidence Scale



Data credibility:	1
Geographic representation:	3
BIA density:	3
Data relevance:	2

Reporting Communities

162 BIAs throughout Ontario

Why It Matters

Jobs are a priority indicator of resilient communities and a healthy economy for all levels of government and local residents. While there is differing opinion on the BIAs' ability to impact this metric, it is a standard baseline measure of the prosperity of an area.

Percentage of daytime population in BIAs

Using the SiteWise tool, the project team selected a central address for each BIA and extracted the Environics daytime population data within a 1km radius of each. While this model isn't perfect, it gave some relevant data to consider regarding employment.

The Environics data provides the following figures for each central address:

- Estimated regular population
- Overall daytime population
- Daytime (home)
- Daytime (working)

From here, a number of interesting cross-comparisons can be modelled:

Percentage of Daytime Population Shift – Top 20 BIAs

This chart represents the top 20 BIAs that have an ability to increase their working population during the day. The percentage of population shift is the rate by which a BIA grows from its standard population to its daytime working population.

BIA	PERCENTAGE OF POPULATION SHIFT
Financial District - Toronto	828%
Downtown London BIA	670%
Toronto Entertainment District	549%
Queen Street West - Toronto	512%
Sparks Street BIA - Toronto	407%
St Lawrence Market Neighbourhood - Toronto	398%

Downtown Yonge - Toronto	383%
Bridgeburg Historic District - Fort Erie	325%
Clifton Hill District - Toronto	307%
Downtown Barrie BIA	292%
Dundas West - Toronto	282%
Downtown Association - Sault Saint Marie	246%
Downtown BIA - Hamilton	245%
International Village BIA - Hamilton	245%
Byward Market - Ottawa	244%
Downtown Sudbury BIA	242%
The Q (Downtown Niagara)	236%
Somerset Chinatown BIA - Ottawa	236%
Bloor Street - Toronto	235%
Kanata North Business Park BIA - Ottawa	230%

Percentage Working – Top 20 BIAs

The Environics daytime population dataset not only gives population, but also the difference in 'working' and 'at-home' population. This chart shows the top 20 BIAs by percentage of working population.

BIA	PERCENTAGE WORKING
Financial District - Toronto	96%
Toronto Entertainment District	94%
Downtown London BIA	94%
Queen Street West - Toronto	93%
Sparks Street BIA - Toronto	92%
St Lawrence Market Neighbourhood - Toronto	90%
Downtown Yonge - Toronto	89%
Byward Market - Ottawa	86%
Dundas West - Toronto	85%
Somerset Chinatown BIA - Ottawa	83%
Clifton Hill District - Toronto	83%
Bloor Street - Toronto	82%
Downtown Barrie BIA	82%
Kanata North Business Park BIA - Ottawa	82%
Bridgeburg Historic District - Fort Erie	81%
Bloor-Yorkville - Toronto	81%
Chinatown - Toronto	79%
Historic Queen East - Toronto	79%
Downtown Sudbury BIA	79%
Downtown Orillia Management Board	78%

Jobs Per Capita (BIA/City) – Top 20 BIAs

While some BIAs' value is in their ability to attract a high volume of working population, others hold value in the percentage of the community's working population. The chart below shows the top 20 BIAs by jobs per capita. For example, while Downtown Campbellford only has 3,675 working population in the BIA radius, it accounts for almost 1:1 jobs in the community.

BIA	POPULATION	JOBS PER CAPITA
Downtown Timmins	43000	0.2
Downtown Trenton BIA (Quinte West)	19300	0.2
Simcoe BIA – Norfolk County	14777	0.2
Downtown Owen Sound BIA	21600	0.2
Bridgeburg Historic District	29960	0.2
Delhi BIA – Norfolk County	4172	0.2
Downtown Bracebridge BIA	15000	0.3
Downtown Orangeville	30000	0.3
Clinton & Central Huron BIA	3201	0.3
Downtown Orillia Management Board	30000	0.3
Downtown Goderich BIA	7520	0.5
Creemore BIA	1300	0.6
Downtown Parry Sound BIA	5800	0.8
Downtown Campbellford BIA	3675	0.9

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Working Statistics by Population Groupings

POPULATION SIZE	PERCENTAGE OF RESPONSE
Over 1M (Toronto BIAs)	
Percentage working average	51%
Daytime population average shift	153%
Average working population per BIA	29399
500,000 – 1M	
Percentage working average	54%
Daytime population average shift	143%
Average working population per BIA	11713
100,000 – 500,000	
Percentage working average	62%
Daytime population average shift	177%
Average working population per BIA	9964
25,000 – 100,000	
Percentage working average	50%
Daytime population average shift	142%
Average working population per BIA	5035
Under 25,000	
Percentage working average	49%
Daytime population average shift	117%
Average working population per BIA	2580

Employment Data Gap

Despite the data that is available regarding daytime populations, there is still a considerable data gap for employment.

Data Needed

Number of full-time and part-time workers by NAICS code over time, both within the BIA area and within a 500metre radius.

Data Gap Identified

Any employment data is subject to collection issues, sampling problems, non-complete surveys and the struggle of person power to go door-to-door where needed and get accurate data.

Consistency has proven to be a challenge. Where Toronto has full-time and part-time employment numbers they don't exist by NAICS code. The NAICS coding system would provide a consistent way to share employment statistics across the province moving forward. In addition, information available may also be represented at different geographies – where Toronto provides data at a BIA level, other data portals using Statistics Canada information can only provide it at the Census subdivision level. There are inconsistencies in data across the province.

There also has to be a benefit to the business or BIA participant to provide the data, and without incentive there is no appetite for disclosure.

Filling the Gap

This study uses daytime population counts through the data portal SiteWise to extract work force numbers within a radial distance of 500m from a centre point, as well as existing statistics from the City of Toronto based on their annual employment survey.

Alternatives considered include:

- Some larger municipalities collect employment data through survey, but not all.
- BIAs can request employment data through their members, but consistency is patchy.
- Mapinfo and Environics have accessible tools whereby shape files can be uploaded and the data easily retrieved. In order to use this data, the project team would need to compile a collection of shape files for all BIAs across the province. This work has been started but is not comprehensive.
- Statistics Canada have the data at the census subdivision level, but would need to make a custom dataset suited to BIAs.

Recommendation

Accuracy is critical, and job counts are an important statistic that has impact with all levels of government. This study recommends further refinement of the numbers through Statistics Canada in order to provide accurate figures for the province, municipalities and OBIAA to share the BIA story confidently.

This will require the compilation of a shape file for each BIA within the province. The work has already commenced through this study, but should be continued in order to provide a comprehensive set. A shape file would allow for the creation of a unique data set of employment for BIAs.

Statistics Canada can do this for a fee.

Indicator(s)

2.0.2 Building permits

Desired Metric

Number and value of commercial, residential and industrial building permits within the BIA and within 500m.

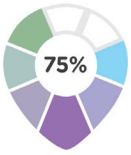
Category

Economic Development

Primary Data Source(s)

Municipal reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	1
Data relevance:	3

Reporting Communities

Trenton, Port Hope, Peterborough, Ottawa (3), North Bay, Hamilton (13), Burlington (1), Ajax

Residential Permits

With 22 reporting BIAs in this category, a total of 38 residential building permits were issued within BIA boundaries in 2011, and 331 permits issued in 2016. While this would indicate incredible growth, the number is skewed by the City of Burlington not reporting in 2011, and reporting a record 244 permits in 2016. Removing this outlier reveals 38 in 2011, and 87 in 2016, illustrating a 128% increase in 5 years for a total project value of $18,256,930.

Within the 500m radius, a very different picture emerges, with 702 permits in 2011, and 1293 in 2016, a growth rate of 184%. In 2016 these projects were valued at $199,584,028, an increase of 478% over 2011.

In 2011, 26% of reporting BIAs recorded no new residential building permits, while in 2016 less than 10% reported no permits issued.

Commercial Permits

Again, in commercial permits, the City of Burlington is

an outlier with more than 100% more permits issued in the Downtown BIA than any other reporting BIA.

Within the BIA boundary geography, there is little change between 2011 and 2016 permits issued, with 148 and 153 respectively. Where the difference is seen though is the value of the permitted projects increasing by 163% from 2011 to 2016 with a total project value of $30,163,109.

Similarly, within the 500m radius geography, commercial permits paints a similar picture to that of the residential with little change in the number of permits issued but a significant increase in the project value. In 2011, the total project value reported was $65,783,841 and in 2016 the value reached $85,124,739, reporting a 29% increase in project value.

Industrial Permits

Within the BIA boundary, only three BIAs reported industrial permits, and each of these were either industrial BIAs (Ottawa) or were in close proximity to industrial areas.

Within the 500m radius though, again a completely different story emerges, with 50% of BIAs reporting industrial permits resulting in a 2016 project value of $12,581,711. These permits reflect an average per project value of $349,492 and a median of 1 permit per BIA, with the outlier of the Ottawa-based industrial BIA of Carp Road.

PERMITS	WITHIN BIA	WITHIN 500M
Residential permits	34%	73%
Commercial permits	60%	25%
Industrial permits	7%	2%

Overall

Overall, reporting BIAs showed rapid growth in development with an increase of 147% in permit issuance across all permit types between 2011 and 2016.

Based on the figures in the chart above, it's apparent that within the BIA boundary the mixed-use nature of the neighbourhood is reflected, with a predominance of commercial permits, while in the surrounding neighbourhood the mix flips to favour residential.

The significant growth in both residential and commercial permits can indicate a number of development patterns. BIAs could be being used as central growth areas to increase density in-line with the Places to Grow Act, they could be responding to a built-form lifecycle with major investments in modernizing tired infrastructure or adaptive reuse projects (which would align with their heritage property assets), or they could be seeing a renewed interest in local investment with new and old business making investments in their spaces.

APPENDIX B:
ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.3 New business openings

Desired Metric

Number of new business openings by NAICS code

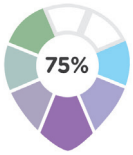
Category

Economic Development

Primary Data Source(s)

Question of the Week + OBIAA member annual reporting

Confidence Scale



Data credibility:	2
Geographic representation:	3
BIA density:	2
Data relevance:	2

Reporting Communities

37 reporting communities from across the province

POPULATION SIZE	# OF NEW BUSINESSES (2016)	PERCENTAGE OF MEMBERSHIP	# OF BIAS IN SAMPLE
Over 1M (Toronto BIAs)	9.8	3%	8
500,000 – 1M	17.4	6%	7
100,000 – 500,000	10.8	4%	5
25,000 – 100,000	10.6	6%	7
Under 25,000	10.4	6%	10

While the desired metric was new businesses categorized by NAICS codes, it was felt this was too difficult a question to send through the Question of the Week process.

The question posed was “How many new businesses have opened in your BIA in the last 12 months?” The participating BIAs reported a total of 432 new businesses with an average of 11.7 new businesses per BIA.

Reviewing the chart, note that the BIA sizes most affected by new businesses were those within cities with a population between 500,000 and 1,000,000. This could be driven by a number of factors including new property development creating opportunities for new offerings, a more volatile market or simply a shift in numbers within 2016 that may not reflect a normal operating year.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.8 Assessed property value

Desired Metric

Property value for commercial and residential properties within BIA boundary and within 500m radius.

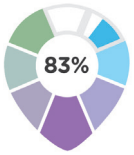
Category

Economic Development

Primary Data Source(s)

OBIAA membership data

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

30 BIAs across Ontario

The desired data set for this indicator is clearly MPAC assessment data. The project team had detailed discussions with MPAC regarding the costs and timing of accessing this customized reporting, and had gathered over 150 BIA GIS shape files to help facilitate the data gathering process. Despite these efforts, the cost to access this data came in at over $25,000 – a cost the project simply could not afford. While numerous municipalities and members of the consulting team have access to MPAC data for BIAs, the licensing agreement from MPAC does not allow the sharing and publishing of this data.

Fortunately, in OBIAA's annual membership process members are asked a series of questions related to their BIA. While there is no strong historical data, the 2017 process yielded information on 30 BIAs from outside Toronto to give a snap shot of assessment value.

As this data set is linked to indicator 2.0.13, the team approached 35 local or regional Real Estate Boards and Associations after learning that the Ontario Real Estate Association (OREA) and Canadian Real Estate Association (CREA) do not have detailed local information. Of these possible data conduits, five responded with information that met the request.

Assessed BIA Property Value

Of the 30 reporting BIAs, the total assessed value was $6,492,848,425.00. Broken down over the population categories, the data reveals the following:

POPULATION SIZE	AVERAGE ASSESSMENT VALUE
Over 1M (Toronto BIAs)	n/a
500,000 to 1M	$94,840,113.53
100,000 to 500,000	$284,833,615.50
25,000 to 100,000	$123,373,151.67
Under 25,000	$58,502,747.47

Despite missing the data from Toronto, the 100,000 to 500,000 category leaps out with an average far exceeding the others. While interesting, linking this data to gross leasable square-footage would provide a more illuminating relationship.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.10 Gross District Product

Desired Metric

Combination of economic factors (sales, employment, gross leasable square footage, etc.)

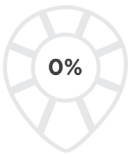
Category

Economic Development

Primary Data Source(s)

Various

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Gross District Product is a borrowed concept from the Barrie BIA, which created a compelling Gross Downtown Product reporting process that combined a number of economic factors to show the value of the BIA.

As this Indicator is an amalgamation of other indicators that currently have data gaps, it was determined that Gross District Product is currently a data gap within the project.

Data Needed

Sales, employment, gross leasable square footage, actual land values, assessment values, private sector investment, + quality-of-life and placemaking metrics - within BIA and broader community.

Data Gap Identified

A number of the data sets needed to create the formula are gaps, as is data from the broader community in which each BIA sits.

Access to MPAC data or more rich municipal data would have likely revealed the Gross Leasable Square Footage data. In this exercise, the project team found that municipal departments engaged were likely working in silos and did not all communicate with the departments who may have held this data. MPAC data was simply too expensive.

The process for this project as also focused on the collection of data focused on the BIA boundary, not the larger community. In order for the GDP indicator to be truly valuable, it needs to be compared to a larger geography - which will require greater data collection time and stronger municipal relationships.

Filling the Gap

Filling the gaps for this indicator will require a number of key partnerships and a much longer data relationship with municipalities. It would also require a new relationship with MPAC or funding for sustained data access.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Recommendation

That OBIAA create data gathering practices on the missing indicators and develop its own GDP evaluation tool.

This would likely be a common web-portal where data sets could be entered by a host BIA and a common evaluation could be produced.

Indicator(s)

2.0.11 Anchors

Desired Metric

Number of and type of businesses that create critical mass of visitors to BIA

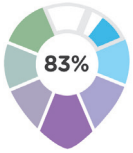
Category

Economic Development

Primary Data Source(s)

Question of the Week reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

31 communities form across Ontario

The question of what anchor businesses attract a critical mass of visits could only be answered by the on-the-ground management of the BIA. As such, this indicator was selected for the Question of the Week process.

While the confidence scale for this indicator could be stronger with greater participation, the commonality within the answers suggests that the information is valid. Based on the participants' answers, anchor businesses were placed into five categories: natural assets, places of worship, events, retail and cultural properties.

The chart below shows the percentage of the assets reported within each category, broken down by population range. The project team sees that cultural properties and natural elements are the most popular within all five population groupings.

Three of the five population groups selected cultural properties as the top business type to generate critical mass. Cultural properties are a combination of assets such as theatres, concert halls, public art, art galleries and entertainment. Natural elements include parks, trails, waterfronts, conservation areas, bodies of water and geological features (i.e. mountains).

It is particularly interesting that natural elements outweighed cultural properties in the Toronto BIAs, and that a major shift in ranking occurs in the 100,000 to 500,000 population category - where cultural properties become the highly dominant favoured asset.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Critical Mass Generating Assets by Population of City

POPULATION SIZE	PERCENTAGE OF RESPONSE
Over 1M (Toronto BIAs)	
Natural elements	31%
Place of worship	17%
Events	10%
Cultural properties	24%
Retail	17%
1M to 500,000	
Natural elements	30%
Place of worship	22%
Events	4%
Cultural properties	35%
Retail	9%
500,000 to 100,000	
Natural elements	15%
Place of worship	10%
Events	5%
Cultural properties	60%
Retail	10%
100,000 to 25,000	
Natural elements	32%
Place of worship	19%
Events	3%
Cultural properties	45%
Retail	
Under 25,000	
Natural elements	22%
Place of worship	9%
Events	30%
Cultural properties	22%
Retail	17%

APPENDIX B:
ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.12 Business mix in relation to strategic plan

Desired Metric

Business mix by NAICS code

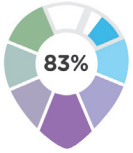
Category

Economic Development

Primary Data Source(s)

OBIAA membership database
TABIA dashboard reports

Confidence Scale



Data credibility:	2
Geographic representation:	3
BIA density:	3
Data relevance:	2

Reporting Communities

112 BIAs across the province including all Toronto BIAs.

With the most robust data set in the project, the information gathered about the business mix makeup of BIAs in Ontario is rather strong. Representing approximately 1/3 of all BIAs, this data set was created by combining the TABIA dashboard reports for Toronto's 82 BIAs with membership lists pulled from BIA websites. Each business was individually coded with its corresponding NAICS code using the pattern set by the TABIA reports.

The chart below contains a breakdown of the BIAs into standard population groups, and shows the percentage of the BIA membership that falls into the corresponding 2-digit NAICS categories. The project team clearly sees that BIAs are primarily comprised of five NAICS codes: Retail Trade (25%), Other Services (19%), Accommodation and Food (18%), Health Care & Social Services (9%) and Professional, Scientific and Technical Services (7%). All other NAICS fall under 3%, with the vast majority having none.

This generates a number of key questions when compared to other data sets within the study – such as the connection to Indicators 3.2.3 (Things to Do) and 2.0.11 (Anchors). These indicators focus on assets that attract the greatest volume of visitors, of which arts, entertainment and recreation rates high. However, in the business mix context, these businesses represent a small percentage of BIA membership. Thus reinforcing the notion that quantity or density does not always correspond with impact or quality.

APPENDIX B:
ECONOMIC DEVELOPMENT INDICATORS

SECTOR NAME	TOTAL AVERAGE	> 1M POPULATION (TORONTO)	500,000 - 1M	100,000 - 500,000	25,000 - 100,000	< 25000
Accommodation and food services	18%	19%	19%	19%	16%	11%
Administrative and support, waste management and remediation services	0%	0%	0%	0%	0%	0%
Agriculture, forestry, fishing and hunting	0%	0%	0%	0%	0%	1%
Arts, entertainment and recreation	1%	0%	5%	4%	6%	4%
Construction	0%	0%	0%	0%	1%	1%
Educational services	1%	1%	2%	1%	3%	0%
Finance and insurance	3%	1%	5%	6%	9%	9%
Health care and social assistance	9%	9%	13%	11%	11%	7%
Information and cultural industries	1%	0%	2%	4%	2%	3%
Management of companies and enterprises	0%	0%	0%	0%	0%	0%
Manufacturing	1%	1%	0%	0%	1%	2%
Mining, quarrying, and oil and gas extraction	0%	0%	0%	0%	2%	0%
Other services (except public administration)	19%	17%	25%	26%	15%	23%
Professional, scientific and technical services	7%	8%	3%	4%	6%	5%
Public administration	1%	0%	1%	2%	1%	4%
Real estate and rental and leasing	1%	1%	1%	3%	9%	3%
Retail trade	25%	26%	24%	20%	14%	25%
Transportation and warehousing	0%	0%	0%	0%	0%	1%
Utilities	0%	0%	0%	0%	0%	0%
Wholesale trade	1%	1%	0%	0%	0%	0%

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.13 Assessed value of surrounding area

Desired Metric

Property value for commercial and residential properties within BIA boundary and within 500m radius

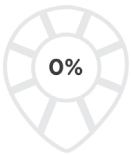
Category

Economic Development

Primary Data Source(s)

Municipal Property Assessment Corporation

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Indicates whether property values in the surrounding area (i.e. 500m) increases in value at the same or different rates than elsewhere in the community.

Data Needed

Actual MPAC assessment values of properties broken down by category (commercial, residential, industrial)

Data Gap Identified

Through this process, the project team identified that MPAC is the desired source for commonly gathered information across the province on property assessment. Despite best efforts to gather GIS shape files (over 150 gathered) of BIAs to lessen the workload for MPAC staff, the cost back to OBIAA to access this data was in excess of $25,000. If this same data set was pulled for all BIAs in Ontario, the costs would exceed $50,000.

Additionally, municipalities had in some cases accessed MPAC data as part of their regular BIA levy determination or economic development review processes. This data is governed by a strict MPAC data sharing agreement that prohibits it from being published except for the purposes of the given project. This in turn limited the ability of this project to report on MPAC data, despite being able to view it.

Filling the Gap

The only way to obtain the data required is to either have a new relationship with MPAC or for funding to be provided to OBIAA to access this data on a regular basis. A one-time request for data would allow the project team to determine its true value, which may result in a continued need for access and funding.

Recommendation

The recommendation is that a future project by OBIAA be given one-time access to MPAC data at no cost so an initial assessment can be made on the value of the data to assessing BIA performance. If proven useful, then MPAC should either augment its data agreement to allow municipalities to share data accessed by their community, or that OBIAA be given special access every 3-5 years for a full data set specific to this ongoing assessment.

APPENDIX B: ECONOMIC DEVELOPMENT INDICATORS

Indicator(s)

2.0.14 Housing prices of the surrounding area

Desired Metric

Property value for commercial and residential properties within BIA boundary and within 500m radius

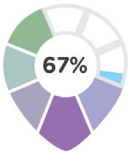
Category

Economic Development

Primary Data Source(s)

Local real estate boards

Confidence Scale



Data credibility:	2
Geographic representation:	2
BIA density:	2
Data relevance:	2

Reporting Communities

Burlington (2), Hamilton (13), Milton, Oakville (3), Ottawa (11)

Single Family Home Sales – Top 10 Rates of Change

BIA	5 YEAR RATE OF CHANGE
Downtown Hamilton	56%
International Village - Hamilton	65%
King West - Hamilton	65%
Concession - Hamilton	69%
Downtown Oakville BIA	74%
Stoney Creek - Hamilton	77%
Burlington Downtown	92%
Ottawa Street - Hamilton	96%
Barton Street - Hamilton	110%
Sparks Street BIA	131%

Of the 27 reporting BIA areas, there was an average increase of 46% for the average sale price of single family homes between 2011 and 2016. Only two BIAs, Carp Road BIA and Kanata Business Park BIA, reported declining values – both of which are industrial BIAs. Oddly enough, note the exact same average increase of 46% in the average sale price of a condominium unit between 2011 and 2016 within the same geographies.

Within these reporting communities, there is a pattern of BIAs taking on specific growth as illustrated in the two following charts.

While the sample is limited, note that Hamilton and Ottawa's real estate markets are sharply on the rise within the proximity of BIAs. This is likely causing a shift in demographics and new business start-ups.

Condominium Sales – Top 10 Rates of Change

BIA	5 YEAR RATE OF CHANGE
Locke Street - Hamilton	28%
Downtown Oakville BIA	29%
Somerset Chinatown BIA - Ottawa	31%
Burlington Downtown	39%
Dundas - Hamilton	46%
Waterdown BIA - Hamilton	55%
Stoney Creek - Hamilton	67%
King West - Hamilton	71%
Aldershot Village BIA - Burlington	181%
Concession BIA - Hamilton	329%

Similarly, condominium sales values are rising sharply in specific areas like Aldershot Village in Burlington and in many of the suburban Hamilton areas. Aside from the outliers of Concession Street BIA and Aldershot BIA, note that while the average 5-year rate of change between single family homes and condominiums is identical across the entire reporting group, the rates in the top 10 vary widely with condominiums having an average of a 29% lower rate of change than single family homes.

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

Indicator(s)

3.1.1 Sales

Desired Metric

Retail sales data of BIA membership

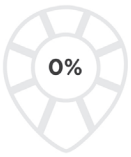
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Indicates productivity and prosperity for the area, both the Business Area itself, and its surrounding neighbourhood.

Data Needed

Actual cash register sales for the BIA area and sales growth/decline for the BIA area.

Data Gap Identified

Data sourcing, transparency, and accuracy have all proven to be challenges in the collection of current sales data.

Filling the Gap

Data sources for this indicator are difficult to establish clearly. There are many ways to obtain portions of this information, but none comprehensive. Commercial business owners and municipalities are reluctant to share real sales figures for public consumption for fear of disclosure and/or comparison. Statistics Canada used to collect sales information through data analysis on Small Area Retail Trade Estimates, but that work ended in 2004 and has not been taken up since. Furthermore, all data collected prior to 2004 is only available at the census subdivision level, and not able to be refined to the BIA level. A third-party transaction based provider such as Visa, Moneris, or Apple Pay, may also provide data, but it is limited to their particular vested interest (i.e. Visa transactions vs. all transactions). Revenue Canada's HST reporting may also be considered for a reverse analysis, but the findings would be derived from secondary information and not be able to depict primary sales figures.

Data transparency is also a concern. While the BIA could collect sales information through surveys or interviews, the source of the data could vary significantly, and would have interest in only sharing aggregated information. In addition, sales information shared could actually relate to another geographical location and skew the findings, where a head office is situated in a different location to the store within the BIA. It is difficult to decipher this through the existing channels.

Data accuracy is also a concern. Government data is not currently available at the BIA level, and what is available is two to three years old. In addition, any qualitative data capture lends itself to speculation and exaggeration. OMAFRA is in the process of developing a tool to capture sales information at a fairly small geography (albeit not BIA level). Its source is Statistics Canada, which while accurate, is two to three years behind. In addition, there are outliers to deal with. National retailers often don't count the sales of the first year of operations into their general reporting because they know that new store openings can cause a crush of customers that will skew data as well. The Retail Council of Canada makes a mistake of not acknowledging the fact that certain retailers such as Apple, Lululemon, Tesla (at Yorkdale), and travel agents will skew the results. Some Apple stores do $10,000 /sq. ft. and Lululemon used to do over $2000/sq. ft. (as said before the Lululemon in Downtown Oakville did about $17 million in sales before they opened in Mapleview Mall). In some malls, Apple is under 10,000 sq. ft. and in others it is greater. As a result, many malls are supposed to take Apple out of their books when doing comparison reporting.

Filling the Gap — Alternative sales collection methods:

- BIA loyalty card program.
- BIA annual membership survey to include sales figures - indicated by range.
- Establish affinity agreement with Moneris (or others) to capture real sales information.
- Develop a sales tracking tool which allows members to gauge whether they are up or down by a certain percentage once a quarter. Administer through a survey or host on a data portal. The sales tracking tool could either have a member benchmark against their own performance the previous quarter or benchmark against an area average.
- Create a representative committee to report on sales for the whole area.
- Triangulation of several data sets and determine if they are all pointing to a similar story of growth or decline.
- Hire a firm such as "KPMG" to create a business reporting tool (note asked businesses whether they would be open to sharing data in such a format).
- Engage Revenue Canada to provide HST reporting, and work backwards on HST.
- Engage OMAFRA, who is currently working with Revenue Canada to track HST and propose the creation of a unique data set using BIA boundaries (GIS shape files).

Recommendation

Through Advisory Committee and membership polling, the project team determined that the development of an administered sales tracking tool for BIA members was the most user friendly and attainable option. The key is consistency of data capture to allow for accurate reporting and analysis.

Assessment of sales should occur in a similar manner to ICSC, where the International Council of Shopping Centers has standardized ways that the malls use to calculate their sales productivity in order to avoid outlier statistics.

Where OBIAA/TABIA could have the membership report quarterly and monitor the results. OBIAA/TABIA should also consider partnership with a larger organization, such as, the Ontario Chamber of Commerce, and have data hosting through a shared portal. Alternatively, a partnership with an institution interested in commercial analytics may also be explored.

Indicator(s)

3.1.5 Business hours

Desired Metric

Hours of operation for BIA Membership

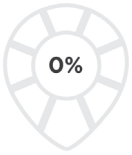
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The study could not identify any findings in this indicator.

Indicator(s)

3.1.6 Visitor satisfaction

Desired Metric

Qualitative survey data on visitor satisfaction in BIAs

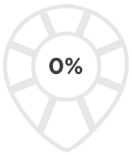
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The study could not identify any findings in this indicator.

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

Indicator(s)

3.1.7 Gross leasable square footage

Desired Metric

Total gross leasable square footage within BIA boundary

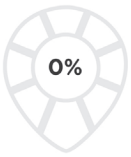
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Indicates the density of leasable space within a BIA. This would primarily be used to compare against other factors such as business mix, membership numbers and sales to set benchmarks.

Data Needed

Actual total leasable square footage of properties within BIA.

Data Gap Identified

None of the participating communities in this process reported their gross leasable square footage despite many members of the research team knowing that this data is available at the municipal level.

Filling the Gap

Assumptions are that the gap in this case is related to three issues: (a) time, (b) merit and (c) departmental silos.

Municipalities are busy institutions and this project, while exciting for many, came as a side project.

With dedicated long-term data relationships with municipalities, greater reporting on indicators that require staff time to gather effectively should improve.

The ROI project is a new initiative and in some cases this gave it questionable merit. As a result of this report and further support from government bodies to continue the report, municipalities will give it greater merit and therefore greater participation.

Finally, the project team found that municipal departments working in silos. If the initial contact was in GIS services, they may not have spoken to their economic development colleagues. If first contact was with economic development, they didn't always talk to culture. Shifting this thinking takes time and a greater effort on the project team's part to create a true data alliance, not just a one-off project. Personalized and in-person engagement of municipal partners would assist greatly in accessing more rich data.

Recommendation

Future efforts of OBIAA should go to greater lengths to create stronger and better informed relationships with municipal partners.

Taking the time to develop relationships through constant communication will create collective buy-in and more thorough data gathering.

Indicator(s)

3.1.8 Business turnover

Desired Metric

Turnover of BIA membership over time

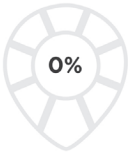
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Indicates whether businesses in the BIA are sustainable and if being within a BIA increases their viability.

Data Needed

Number of businesses that join or exit a BIA on an annual basis.

Data Gap Identified

Business turnover is particularly hard to track as there is no known mechanism for tracking this specific action. Bankruptcy tracks only businesses that permanently close. Business licensing tracks the start-up data and location of a business, but not if they move or close, and is not readily available from municipal partners. This left the group with identifying this as a gap likely best filled through BIA management and a standardized process of monitoring vacancy and occupancy.

Filling the Gap

As with a number of gaps, this gaps is one that would be best served through a BIA management process. While BIA staff were asked through the Question of the Week process about vacancy, the answers were most likely anecdotal and not driven by a rigorous process.

Changing this from a data gap to a trustworthy indicator demands a standardized process that empowers BIA management to track, analyze and report on turnover.

Recommendation

OBIAA develop a standardized process for tracking, analyzing and reporting on turnover that can be delivered by the average BIA staff or volunteers. This information should be fed back to OBIAA in its annual member survey for province-wide reporting and analysis.

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

Indicator(s)

3.1.9 Business longevity

Desired Metric

Years in operation by BIA member

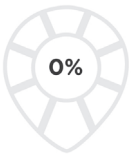
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Indicates if BIA are home to long-standing businesses and whether SMEs have greater longevity when in a BIA.

Data Needed

Start date of member businesses within a BIA.

Data Gap Identified

Similar to business turnover, there is no standardized practice for tracking and reporting on the longevity of member businesses within a BIA. While some BIA staff know flagship business information (i.e. Fabricland has been here 100 years) most do not know similar data for their entire membership. Municipal permitting is also not a reliable source for this data as the date of a business's permit of occupation, may not be the date it started operations.

Filling the Gap

The best and most reliable source for this information are the business members of BIAs themselves. Surveying the membership and making this information part of their annual reporting to their BIA is the only efficient way of gathering data. This will require significant communications efforts from BIA staff and assistance from OBIAA in exploring the best practice for achieving success.

Recommendation

OBIAA should develop a standardized process for gathering this information from BIA member businesses. This will require minor consultation with BIAs to better understand their current member communications practices, and creating a standard data capture process that can be enacted across the province.

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

Indicator(s)

3.1.10 Vacancy

Desired Metric

Number of vacant units in a BIA per year

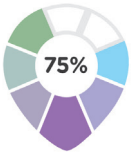
Category

Support Local Business – Business Impact

Primary Data Source(s)

OBIAA annual membership application data.

Confidence Scale



Data credibility:	2
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

34 BIAs from throughout Ontario

Vacancy

Via the BIA Question of the Week process, BIA staff were asked to report the average number of vacancies in a given year. A total of 34 responses were received, with four being "not sure." The chart below illustrates the average number of vacancies per BIA for the standard population ranges.

The results clearly illustrate the difficulty larger cities are facing with respect to vacancies, with the rate in cities sized 100,000 to 500,000 being double that of other communities.

POPULATION SIZE	AVERAGE NUMBER OF VACANCIES
Over 1M (Toronto BIAs)	6.3
500,000 - 1M	9.4
100,000 - 500,000	21.6
25,000 - 100,000	9.5
Under 25,000	10.6

Indicator(s)

3.1.11 Number of small independent businesses

Desired Metric

Number of non-chain business in BIA boundary

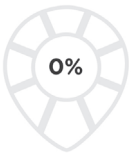
Category

Support Local Business – Business Impact

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The study could not identify any findings in this indicator.

Indicator(s)

3.1.12 Number of chains

Desired Metric

Number of chains within a BIA

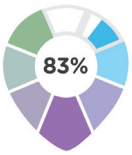
Category

Support Local Business – Business Impact

Primary Data Source(s)

BIA membership list review

Confidence Scale



Data credibility:	2
Geographic representation:	3
BIA density:	2
Data relevance:	3

Reporting Communities

30 sample BIAs selected from overall business mix data.

APPENDIX C: SUPPORTING SMALL BUSINESS INDICATORS

Number of Chains

POPULATION SIZE	CHAINS
500,000 - 1M	
Average number of chains	10.2
Chains as percentage of membership	3%
100,000 - 500,000	
Average number of chains	36.6
Chains as percentage of membership	12%
25,000 - 100,000	
Average number of chains	9.6
Chains as percentage of membership	7%
Under 25,000	
Average number of chains	11.8
Chains as percentage of membership	6%

For the purposes of this indicator, chains were defined as businesses with four or more locations. Based on the membership lists pulled from BIA member websites, the number of known chains within each BIA for a sample of 30 BIAs that align with the population breakdowns and geographic lens was tabulated.

As noted in the chart, chains average 10.5% in most city categories, with the exception of the 100,000 to 500,000 category, where chains reach over 35% of the BIA membership.

Indicator(s)

3.2.3 Things to do in a BIA

Desired Metric

Number of things to do within BIA boundary outside of retail experience

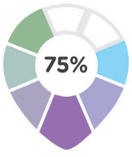
Category

Support of Local Business – Visitation

Primary Data Source(s)

Municipal reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	1
Data relevance:	3

Reporting Communities

Trenton, Port Hope, Peterborough, Ottawa (3), North Bay, Kenora, Hamilton (13), Burlington (2), Barrie, Ajax.

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

For this indicator, municipal partners were asked to report on the number of assets with 500m and 2km of the BIAs in their community. The assets that were selected for analysis were chosen in an effort to understand the opportunities for engagement beyond events for a wide range of resident and visitor populations.

Within 500m

ASSET	TOTAL QUANTITY	PERCENTAGE OF ASSET MIX	MEDIAN PER BIA
Public parks	325	36%	12
Public art	125	14%	1
Cultural facilities	69	8%	2
Farmers' market	15	2%	1
Municipal recreation centres	40	4%	1
Sports facilities	16	2%	0
Seniors centres	8	1%	0
Community hubs	6	1%	0
Places of worship	233	26%	9
Outdoor patios	43	5%	0
Public squares	10	1%	0
Early learning centres	4	0%	0

Within 2km

ASSET	TOTAL QUANTITY	PERCENTAGE OF ASSET MIX	MEDIAN PER BIA
Public parks	1289	44%	45
Public art	319	11%	4
Cultural facilities	175	6%	3
Municipal recreation centres	134	5%	4
Sports facilities	62	2%	0
Seniors centres	15	1%	0
Places of worship	921	32%	20
Community hubs	6	1%	0
Places of worship	233	26%	9

APPENDIX C:
SUPPORTING SMALL BUSINESS INDICATORS

Indicator(s)

3.2.4 Parking utilization

Desired Metric

Number of parking spaces within BIA boundary
Parking revenue
Percentage of utilization

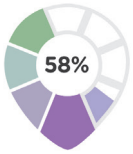
Category

Supporting Local Business – Visitation, Movement and Marketing

Primary Data Source(s)

Municipal reporting

Confidence Scale



Data credibility:	3
Geographic representation:	1
BIA density:	1
Data relevance:	2

Reporting Communities

Trenton, Norfolk County (2), Port Hope, Peterborough, North Bay, Kenora, Hamilton (13), Ajax.

While 19 BIAs submitted data for this indicator, the vast majority reported having no data. Aside from Hamilton, only two other communities had actual parking utilization data reports. In some cases, this is due to the fact that the municipality does not charge for parking and therefore has no data to report.

Indicator(s)

3.2.6 Pedestrian counts

Desired Metric

Total pedestrian footfall within BIA boundary over common period of time.

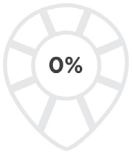
Category

Support Local Business – Visitation, Movement & Marketing

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

Why It Matters

Pedestrian counts are considered a key indicator for event success and allow both local businesses and the municipality the opportunity to market successes, encourage sponsorship of future events, assess barriers, and establish peak business periods. This information will establish a baseline, and tracks increase/decrease at events helpful for Tourism statistics and municipal infrastructure planning. It provides an economic way to connect sales data and economic impact of events and for the local business.

Data Needed

Actual footfall within the BIA.

Data Gap Identified

Availability of accurate information is a challenge. References to attendance and pedestrian counts were seen to be subjective estimates and not helpful success measures.

While digital counters are available, their purchase has historically been cost prohibitive, although is decreasing in recent years. Pilot projects have identified that one counter may not actually be enough, and deciding on the right location for a counter in order to most accurately reflect footfall can be challenging.

Different methods can result in substantially different results. Where a Wi-Fi counter is limited by the number of users that decide to take up the free Wi-Fi in the area, a physical person counting is subject to human error, and finally the digital counter only reflects a point in space, and foot traffic – it is limited by its location and lack of recognition of multiple trips.

Coordination of information between BIA and municipality and BIAs across the province is needed to ensure consistency in data capture, methodology and cross comparison.

APPENDIX C: SUPPORTING SMALL BUSINESS INDICATORS

Filling the Gap

Alternatives for collection of footfall traffic were considered:

- Intercept counter: Hire someone to stand and physically count people and/or vehicle as they enter the BIA area.
- Digital pedestrian counter placed at strategic location on the periphery or within the BIA. Examples such as Eco Visio have been used.
- Cell phone pings (Live Gauge, People Flow) and BIA centric Wi-Fi data.

Recommendation

BIAs will achieve the greatest accuracy through the use of a digital pedestrian counter.

This study recommends that OBIAA/TABIA work with the province to identify the appropriate funding mechanism to allow all BIAs in Ontario greater access to a digital pedestrian counter. Funding options include:

- OBIAA to create an open platform through bulk buying/affinity program with a preferred supplier.
- Provincial funding for municipalities to purchase on their behalf and build stronger partnerships between municipalities and BIAs.
- Partnership between OBIAA/TABIA and municipalities to ensure access to a pedestrian counter.
- Trillium Grant for bulk pilot project.

Indicator(s)

3.2.8 Visitor recall of BIA marketing

Desired Metric

Qualitative value of BIA brand

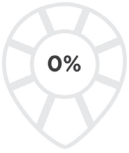
Category

Support Local Business – Visitation, Movement & Marketing

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

No communities responded with data in this category.

Indicator(s)

3.2.9 Testimonial, visitor reviews

Desired Metric

Qualitative value of BIA brand and experience

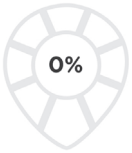
Category

Support Local Business – Visitation, Movement & Marketing

Primary Data Source(s)

None

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

No communities responded with data in this category.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.1.1 Yearly review of strategic plan

Desired Metric

How many BIAs review their strategic plan, and on what frequency.

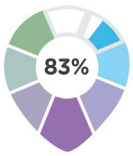
Category

Community Building – Internal Capacity

Primary Data Source(s)

Question of the Week

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

47 BIAs from across Ontario

REVIEW FREQUENCY	RESPONSE PERCENT	RESPONSE COUNT
Annually	40.4%	19
Every 3 years	19.1%	9
Every 5 years	17.0%	8
Every 10 years	0.0%	0
We don't have one	19.1%	9
Never	4.3%	2

Understanding the nature of BIAs' strategic planning practices gives a window into Board and staff competency, their ability to be responsive or focused, and to a degree, the level to which they are working with intention.

With 47 communities responding from a wide spectrum of BIAs, the answers provided by these respondents are likely indicative of the larger OBIAA membership.

While it may be an assumption that smaller communities are less likely to have a strategic plan or regularly monitor their progress, this is not the case. Within the 23.4% of BIAs that either answered 'We Don't Have One' or 'Never', there was a range of BIAs representing both small towns and Toronto-based BIAs.

Nearly 60% of the reporting members review their Strategic Plan every 3 years or less. This bodes well for the success of future association-wide changes to reporting and participation in data collection programs.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.2.1 Amount of collaboration with municipality
4.2.2 Number of departments that BIA works with

Desired Metric

Quantitative and qualitative understanding of BIA and municipal collaboration.

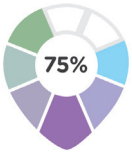
Category

Community Building – External

Primary Data Source(s)

Question of the Week

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	1
Data relevance:	3

Reporting Communities

40 BIAs across the Province

It is extremely encouraging, and not surprising, that 84% of BIA staff rate their level of collaboration with municipal partners between 7 and 10. Less than 10% fall below a rating of 5. This means the relations are strong and are being put to work for their respective communities.

RATING (1 = POOR, 10 = EXCELLENT)	PERCENTAGE OF RESPONDENTS
10	8%
9	23%
8	28%
7	25%
6	5%
5	8%
4	3%
3	3%
2	0%
1	0%

DEPARTMENT	PERCENTAGE OF RESPONDENTS
Planning / Building	7%
Economic Development	18%
Tourism / Culture	14%
By-Law / Licensing	9%
Public Works	7%
Parks & Recreation	9%
Clerks	5%
Marketing / Communication	3%
Transit	4%
Heritage	3%
Finance / Tax	5%
Emergency Services	8%
Engineering	3%
Social Services / Community Services	3%
Legal	1%

The project team continues to see these strong relationships through the sheer quantity and range of departments that BIAs are regularly interacting with as illustrated in the chart below. An area of greater enquiry by the consulting team would be to explore how many communities have 'point people' within their municipality who act as trusted conduits to other important departments (i.e. Finance, Park & Recreation, and Public Works) where the engagement rating is low.

Indicator(s)

4.2.3 BIA submissions and presentations to Council

Desired Metric

Number and success rate of submissions to Council by BIAs.

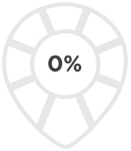
Category

Community Building – External

Primary Data Source(s)

Question of the Week

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The study could not identify any findings in this indicator.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.2.4 Engagement with neighbourhood organizations
4.2.5 Number of committees / organizations BIA participates in

Desired Metric

Qualitative and quantitative review of community involvement.

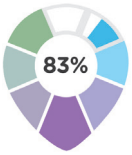
Category

Community Building – External

Primary Data Source(s)

Project consultation process

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

See pg. 29 of the *ROI of BIAs Consultation Report* for reporting community details.

As part of the consultation process, 360 Collective interviewed and surveyed BIA staff on their relationships with municipal and external community groups.

The information shows that BIAs have relationships with up to 15 categories of external groups ranging from services clubs to neighbourhood association, arts groups to schools and libraries.

What's revealing about this data is the diminished ranking of the quality of relationships, and the groups with whom BIAs have rare relationships. Despite the draw value of cultural groups found in other indicators, this relationship is rated at 56%. Schools, which play a strong role in the 500m radius of most BIAs, are also rated incredibly low at 28%. Finally, services clubs and places of worship, a huge network within close proximity to most BIAs, is also low at 45%. Neighbourhood associations at 29%.

This lack of strong connection to community group spells out a clear opportunity for improved community relations and new audience development for BIAs and their membership. See pg. 29 of the *ROI of BIAs Consultation Report* for further details.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.2.6 Number of non-BIA events held in BIA

Desired Metric

Number of events held within a BIA and the level of BIA involvement

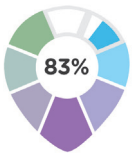
Category

Street Appeal – Experience

Primary Data Source(s)

Question of the Week

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	3

Reporting Communities

43 communities ranging from Jackson's Point to Toronto Danforth

Number of Events per Year

	1-5	5-10	10-20
BIA run events (sole operator)	65%	21%	5%
BIA co-sponsored events (with other organizations)	70%	16%	2%
Non-BIA run events	47%	12%	14%
Municipal recreation centres	134	5%	4

As indicated in the chart, above 65% of BIAs manage between one and five events each year, and 45% are home one to five each year that are managed by an outside organization. Applying this average across the full OBIAA membership would reveal approximately 1200 BIA-produced events and approximately 1300 outside events.

While it's tempting to apply even a basic audience assumption to this figure, it's impossible to predict the range of events covered. From sidewalk sales to large-scale events such as Nuit Blanche, the range is simply too broad to create an effective model to approximate attendance.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.2.8 Crime statistics

Desired Metric

Standardized data on reported crime within BIA and surrounding area

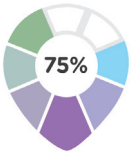
Category

Community Building – External

Primary Data Source(s)

Regional police department online crime mapping
Municipal reporting

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	1
Data relevance:	3

Reporting Communities

Online crime mapping (Thunder Bay, Ottawa, Oakville, Milton, London, Burlington, Acton)

With a lack of cooperation from local law enforcement agencies to readily fill data request, the project team explored all available online crime reporting sites linked directly to police services throughout the province. The project team found a wide range of resources that make comparing crime data challenging. There are approximately four providers of crime mapping software, and each locale has its own data sharing policy. For example, in some communities the online data site lists all crimes within a set date range whereas others only show crimes in the past 120 days. For the most part, the names of crimes are standardized based on their legal definition, but in some cases, the system marries together different crime types. This makes accurate data analysis impossible. In most cases, more detailed information would have to come through a Freedom of Information (FOI) request and would likely not be satisfactorily filled.

Based on the online data from 23 BIAs, there are three common trends worth noting. Not surprisingly, theft/ fraud and shoplifting ranks the highest by volume of

CRIME TYPE	TOTAL	PERCENTAGE OF TOTAL	MEDIAN
Violent crime	653	13%	13
Burglary / robbery commercial	391	8%	13
Burglary / robbery residential	425	9%	8
Sexual assault	39	1%	1
Theft / fraud / shoplifting	1477	30%	36
Motor vehicle burglary	413	8%	13
Alcohol / quality-of-life	1168	24%	7
Weapons violation	107	2%	0
Arson	3	0%	0
Vandalism	280	6%	0

offenses and median. Not far behind are alcohol and "quality-of-life" offences, which include everything from low-level narcotic offenses, to loitering and public nuisance. The third trend is that violent crime combined with sexual assault, undoubtedly a violent crime, is the third highest offence rate.

Comparing these numbers to accurate city-wide numbers would be very valuable in determining if particular BIAs are disproportionally affected by any one type of crime.

Indicator(s)

4.2.9 Perceptions of crime

Desired Metric

Qualitative perception of crime data from residents and BIA members

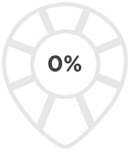
Category

Community Building – External

Primary Data Source(s)

Regional police department online crime mapping
Municipal reporting

Confidence Scale



Data credibility:	0
Geographic representation:	0
BIA density:	0
Data relevance:	0

Reporting Communities

None

The study could not identify any findings in this indicator.

APPENDIX D:
COMMUNITY BUILDING INDICATORS

Indicator(s)

4.2.10 Engagement with local police

Desired Metric

BIA engagement with local law enforcement

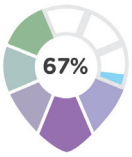
Category

Community Building – External

Primary Data Source(s)

None

Confidence Scale



Data credibility:	3
Geographic representation:	2
BIA density:	2
Data relevance:	1

Reporting Communities

Trenton, Port Hope, Peterborough, Ottawa, North Bay, Kenora, Hamilton, Burlington, Barrie, Ajax.

Of the 25 reporting BIAs, 60% have at least one local policing centre within 500m of the BIA. This means that regular interaction is likely due to proximity and positive community relations.

Aside from this relationship, there was no qualitative data available on the quality of the relationship nor quantitative data on the number of reports or complaints filed with local law enforcement.

APPENDIX E: SECONDARY RESEARCH METHODOLOGY

The secondary research was comprised of four components of work.

- A literature review which scanned government, municipal, academic and private industry literature, and focused on identifying current research on BIAs in Ontario (and Canada).
- A review of existing BIA data sources, both municipal and BIA specific, and a summary of what data is being tracked on Ontario BIAs at present.
- A review of ten municipalities selected to represent the different regions and geographies of BIAs across Ontario including both urban and rural, small and large, and each region of the province as defined by MMAH. In addition, data gathered at a BIA level was also assessed through the selection of a representative set of BIAs in Ontario. All research was web-based, with a select number of phone calls to municipal economic departments.
- A review of similar benchmarking studies and their approach to aggregating data to help inform the final report, and finally a jurisdictional scan of other cities or regions to understand how they track and evaluate the role of BIAs in communities. This work allowed for a best practice review of different data collection and evaluation frameworks from around the world, as well as consideration of how these frameworks might apply in the Ontario context.

Four jurisdictions were selected based on their ability to meet at least three of the four following criteria:

- Legislation: Does the jurisdiction have specific BIA legislation in place? At what level of government?
- Funding mechanism(s): Is there a funding mechanism in place? What kind(s)?
- Impact on improving business: What is the role of BIAs in improving Business? What is the scope of their responsibilities? BIAs play very different roles within their communities, even within the same jurisdiction. Jurisdictions where BIAs have a role and scope similar to that of the Ontario context will be prioritized.
- Monitoring and evaluation: Does the jurisdiction engage in regular monitoring and evaluation or tracking of BIAs? What sorts of things are tracked?

Based on these criteria, four jurisdictions were selected: New York City, Scotland, Alberta and Saskatchewan. A secondary research analysis of each jurisdiction was then completed to understand their legislative framework, funding mechanisms, role in business and ongoing monitoring and evaluation practices.

The Background Research Report is available at **www.obiaa.com**.

APPENDIX F: CONSULTATION METHODOLOGY

Consultation primarily was focused on the engagement of key stakeholders -- the BIA membership, municipal and provincial officials, businesses and the public - to obtain information to inform the project goals. It was used secondarily to collect data from the BIA membership and businesses to help fill in required data gaps in the indicator analysis component.

The consultation component of the project took place throughout the entire work program. The approach acted as the baseline for consistent engagement throughout the project. A series of surveys, workshops, interviews, webinars and social media blasts were used at each phase of the project to carry this out.

Given the scale of the research project, outreach to the BIA membership across the province was a priority. The consultation strategy's goal was to demonstrate how the BIA membership in varying geographical and regional contexts was to be engaged and to ensure that there were a variety of opportunities to participate throughout the project.

The Consultation approach through each phase was as follows:

Phase I

- Use digital surveys and key stakeholder interviews to gain insight on potential indicators for BIAs role in communities.

Phase II

- Use webinars, social media campaigns and surveys to engage the membership in discussions around the current state of BIAs and the potential indicators that could be used to represent collective interests, along with key stakeholder interviews.

Phase III

- Use a series of surveys with key BIA executives and businesses along with a webinar to discuss the selected indicators, fill in data gaps, and outline the next phase of data capture and analysis.

Phase IV

- Conclude the project with a knowledge sharing campaign around the annual conference.

The outreach undertaken includes:

1. The team: including OBIAA, TABIA, Fotenn, Cobalt Connects, Brand Clarity, and 360 Collective.
2. Advisory Committee members – representative set of BIA knowledge across the province and in various geographies, comprised of industry experts, municipal and provincial staff, and BIAs.
3. BIA executives – to provide insight on advocacy work and the information needed to share the BIA Story for each audience.
4. BIA membership – to provide on-the - ground feedback of the information they want to know about from their BIA.
5. Provincial ministry partners – to provide insight into the metrics that the province is looking for from BIAs.
6. Institutions – to provide assistance in identifying where information lives and data sources.
7. Municipal partners – to provide insight into the information that they collect, and the metrics that they are interested in knowing about in their BIA areas.

The Consultation Report is available for download at **www.obiaa.com**.