

Foreword

Background and Research Objectives

The False Creek Flats is a centrally located industrial area that is home to a variety of light industrial and service businesses, ranging from wholesale, manufacturing and automotive to mixed-use retail/office and residential/hotel uses and emerging high tech office-industrial developments. In the past rail activities dominated the business focus, and while rail the yards remain, their footprint has been somewhat reduced in recent years.

In October 2003, Vancouver City Council directed that the planning of the False Creek Flats should take advantage of opportunities to better integrate the 1-3 area in the western and southern flats, develop long range land use and transportation directions, and provide an overall development perspective, and to maintain and strengthen the role of the 1-2 area in the eastern Flats in servicing the Port and the Downtown. Council also reaffirmed the city-serving, employment and transportation roles of the easterly 1-2 area.

With some recent land acquisitions and site planning there is interest by some developers and owners in rezoning portions for other uses, such as a multi-disciplinary medical centre. The Flats' central location, changing land-uses and growing population and employment in the surrounding areas indicate a need at this time for gathering and updating information for planning purposes. There are opportunities to complement the economic development strategy for the City, provide better interface and linkage with adjacent communities and support emerging needs of the citizenry and the business community.

It was for these reasons that the City of Vancouver's False Creek Flats Project Team (co-managed by the Planning and Engineering Departments) commissioned a survey of businesses in the False Creek Flats to better understand the characteristics of existing businesses, their needs and contributions to the City's economy.

A survey was conducted amongst businesses currently based in the False Creek Flats (as per map on following page). The survey set out to collect information on

- the types of business activities operating in the area (later designated with NAICS codes)
- characteristics of these firms, in terms of
 - years in business
 - social/environmental contributions
 - number of employees and employee residence characteristics
- economic impact in terms of value of goods and services
 - sold by these businesses
 - purchased by these businesses
- space needs
- location factors important to the businesses and plans for location change
- use of transportation and parking facilities



Methodology

A self-administered mail return survey was distributed by mail to False Creek Flats businesses. This included all businesses, regardless of whether the business owner or manager was a tenant or owned the business property.

Sampling

Several sample sources were utilized to identify as many businesses as possible in the defined area. First, the 413 businesses provided by the City from the 2005 Business License Records formed the initial data source for our sample frame. This was then matched by company name and address to a robust Canadian business database with NAICS codes and employee size. The corresponding NAISC codes and other available information were then attached to the initial data listings from the City if possible.

Next, the City records listing were augmented with additional listings from comprehensive Canadian business databases and business listing sources, falling within each of the four sub-areas and geo-coded accordingly.

Finally, a census update of the area establishments was conducted by our staff involving an on-site confirmation of the existing business addresses and for those not listed in the database, collection of business name, address, type of business (if apparent) and phone number where possible.

The database was examined closely to eliminate duplicate listings (e.g., same company at same/adjacent location with multiple licenses). A total of 511 business listings were deemed eligible.

Mail out

Prior to mail-out, an initial call was made to all businesses on the final sample list to ensure that the mail-out was directed to the correct individual in an attempt to save time and reduce misdirected surveys. Those listings that refused to participate in the mail-out survey (6%) or that had not in service telephone numbers (4%) were excluded from the mail-out. Mail-out packages were sent to all other listings, totaling 448.

The mail-out package included a letter from the City signed by the Mayor, explaining the purpose of the survey, its importance and benefit to existing businesses. A letter providing assurance of confidentiality of all information and our privacy practices was also included from Mustel Group. The questionnaire, a post-paid return envelope were enclosed, as well as City Planning and Mustel Group contact names/phone numbers to

field respondent questions or concerns. A separate flyer from the False Creek Flats was included, giving people the opportunity to receive informational updates on the planning process and meetings.

Questionnaires were pre-serialized so that the geographic sub-area was identified and to enable follow-up calls to non-responders. In total, 448 survey packages were initially sent out. Second mailings were sent when requested by the respondent.

Provision for completing the survey in alternate languages were made to allow for full participation by all business owners, if needed, however this was not requested by any respondents during fieldwork.

Reminders/Follow-up

A minimum of two reminder telephone calls were made to boost response rates and ensure response from each of the four geographic sub-areas. These calls were conducted in two waves.

Incentive

As a further attempt to boost response rates, businesses sampled were told that a donation would be made to a local charity on behalf of False Creek Flats businesses; each returned survey would add to this donation.

Response Rate

Based on the 448 mail-outs, an overall response rate of 32% was achieved, a good response rate for a self-completion mail-back survey (see Appendices).

Sample Validation

The final sample was compared to the original sample frame and was found to be very close in terms of area distribution. As a result, the data was not weighted.

Sample Distribution		
Region	Total <u>Respondents</u> (141) %	Total <u>Census</u> (511) %
Area 1	17	18
Area 2	13	10
Area 3	38	40
Area 4	33	32

Results

The results are presented here in the format of an *Executive Summary*, summarizing the key findings.

Statistical tolerance limits (or sampling margin of error) for a sample of 141 interviews from a finite universe, or total study population (511) are +/- 7.0% at the 95% confidence level (or 19 times out of 20, if the study were to be repeated).

Throughout the report, comments on subgroup differences are statistically significant at the 95% level of confidence.