



Report for:
CITY OF VANCOUVER

City of Vancouver Metropolitan Core Business Survey – Phase One

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EXECUTIVE SUMMARY

A mail survey was conducted of 5,286 selected businesses in the City of Vancouver Metropolitan Core. The response rate was 23%, for a total of 1,200 completed surveys. The survey focused on major commercial and industrial areas and buildings in most of the major Metro Core business areas. The survey did not include ground-floor retail and restaurants, or residential areas with home-based businesses, nor did it include the areas of False Creek Flats and the Downtown Eastside, each of which has a survey being conducted separately.

Profile of Businesses

- ◆ The three most common activities of businesses in the survey are legal, accounting, and consulting services (15%), health care and social assistance (13%), and design, scientific, and technical services (12%).
- ◆ Three-quarters (74%) of businesses were established from 1980 onwards.
- ◆ On average, businesses have been at their current location for a total of 9.5 years.
- ◆ Businesses are much more likely to rent (88%) rather than own (11%) their current business location.
- ◆ On average, businesses occupy 3,806 square feet, and range from less than 500 square feet to over 20,000 square feet. Half of the businesses occupy more than 1,800 square feet, and half occupy less than 1,800 square feet.
- ◆ The majority (80%) of businesses only occupy one floor. The average number of occupied floors is 1.4.
- ◆ Office space is by far the most common use of floor space (comprises an average of 77% of businesses' floor space).
- ◆ One-in-ten (9%) businesses conduct activities that involve noise, dust, odours, bright outdoor lights, heavy truck deliveries, or late night operations.

Business Location Factors

- ◆ A “sense of safety and security” is by far the most important factor taken into consideration when deciding on a business location (87% of businesses rate this as “essential” or “important”).
- ◆ Other factors deemed important by the majority of businesses include “close to Downtown Vancouver” (57%), “attractive street environment” (55%), “entire business on one floor” (52%), “face-to-face contact” (52%), “customer parking” (52%), “close to transit or SkyTrain” (52%), and “employee parking” (51%).
- ◆ The least important location factor is outdoor storage space (4%).



- ◆ Businesses indicate they are highly satisfied with many aspects of their location. The most satisfactory component is “close to Downtown Vancouver” (99%).
- ◆ The least satisfactory component is “customer parking” (64%).
- ◆ One-third (33%) of businesses say they are in need of transportation improvements such as roads, parking, or transit at their location. Parking is identified as the area most in need of improvement (mentioned by 78% of these businesses).
- ◆ Most companies prefer business only buildings (62%, versus 14% who prefer mixed use buildings). However, companies are divided as to their preference for their business location (38% prefer mixed use districts and 36% prefer business districts).
- ◆ Six-in-ten (60%) businesses moved to their current location from somewhere else. Of these businesses, 90% moved to their current address from another location in Vancouver. The primary reason for moving is size/space requirements (34%).
- ◆ Almost two-thirds of businesses (63%) do not believe there is another location in the city or region that would meet their needs. One-third (34%) of businesses are aware of such a location. Of these businesses, 80% say that this other location is within the City of Vancouver.

Business Plans

- ◆ In the past five years, 49% of companies report no change in their business, while 40% expanded or invested. Another 9% say they downsized during this time.
- ◆ Looking into the future, the majority of businesses (54%) have no plans to downsize, expand, or close their current location. One-third (33%) anticipate expanding or investing, while 9% plan on closing and 2% plan on downsizing.
- ◆ Of those 9% that plan on closing, the majority (88%) indicate that they are closing to move to another location. Seventy-two percent of these businesses plan on moving to another location in the City of Vancouver.

Customer Information

- ◆ More than half (53%) of businesses’ goods and services go to customers within the City of Vancouver. More specifically, 33% of goods and services are provided to customers in the Metropolitan Core, 20% go to those elsewhere in the City of Vancouver, and 22% go to those elsewhere in the Lower Mainland. Twenty-six percent of goods and services are provided to customers outside the Lower Mainland.



Supplier Information

- ◆ The majority (62%) of businesses' goods and services are purchased from other companies located within the City of Vancouver. Four-in-ten (40%) of purchased goods and services are from the Metropolitan Core area, 22% are from companies elsewhere in the City of Vancouver, and 21% are from those elsewhere in the Lower Mainland. Another 17% of goods and services are purchased outside the Lower Mainland.

Transportation Needs

- ◆ The majority of companies do not use goods movement vehicles at their location on a regular basis. In total, 43% of businesses say vans and pick-up trucks access their location on a weekly basis, 26% are accessed by light trucks, and 9% are accessed by heavy trucks. The average number of vehicles accessing businesses in a typical week stands at 7.8 vans or pick-up trucks, 3.8 light trucks, and 1.1 heavy trucks.

Journey to Work

- ◆ On average, 47% of businesses' employees drive to work alone. Another 32% use public transit (bus, SkyTrain), 15% walk or bike, and 6% carpool.

Employee Information

- ◆ On average, businesses employ a total of 18.2 employees (15.3 full-time employees and 2.9 part-time employees). Total employees range from 1 to over 100.
- ◆ The average number of employees that work during a regular shift stands at 14.1.
- ◆ On average, businesses are open for 9.4 hours a day.
- ◆ On average, 55% of businesses' employees live in the City of Vancouver.

Businesses' Final Suggestions/Concerns

- ◆ When asked to provide any final suggestions or concerns, a total of 460 of the 1,200 businesses surveyed provided a response.
- ◆ Of these 460 businesses, 36% mention issues related to safety and security. Other areas of concern include traffic/roads (16%), parking (15%), zoning (12%), cost (including property taxes) (11%), and public transit (10%).



INTRODUCTION

Objectives

The City of Vancouver recently embarked on an economy-related land use planning process for the Metropolitan Core (see map in the Methodology section below), and understanding the area's current economic situation is an important component of this process. To this end, the City commissioned Ipsos Reid to conduct a survey of selected businesses located within the Metropolitan Core. Ultimately, this information will provide key information for the preparation of the City of Vancouver's *Metropolitan Core Jobs and Economy Land Use Plan*.

Specifically, the main objectives of this research project were to:

- ◆ Develop a profile of businesses in the Metropolitan Core (business activity, years of operation, floor space, etc.);
- ◆ Identify key location factors when deciding on a businesses location;
- ◆ Determine businesses' satisfaction with specific aspects of their current location;
- ◆ Identify any perceived transportation improvements that are required;
- ◆ Gauge businesses' preference for mix use buildings/districts versus business only buildings/districts;
- ◆ Understand businesses' past and future plans at their current location;
- ◆ Collect customer and supplier geographic information;
- ◆ Determine the number of goods movement vehicles accessing businesses in a typical week;
- ◆ Identify employees' transportation methods for getting to work; and,
- ◆ Collect information on businesses' employees, including the number of employees, hours of operation, and percentage of Vancouver-based employees.



Methodology

To accomplish these objectives, Ipsos Reid conducted a mail-survey of selected businesses in the Metropolitan Core. The City of Vancouver provided the sample (names and mailing information), generated from the City's Business License System. In total, 5,286 businesses were contacted to participate in the survey. The selected business types and locations were as follows:

- ◆ Business in the business sub-areas of the Metro Core that are shown on the attached map. (Other areas of the Core - the False Creek Flats Industrial Area and the Downtown Eastside, both of which are undergoing area planning programs - participated in separate surveys. The results of these surveys will be reported elsewhere.)
- ◆ Businesses that generally occupy industrial buildings or the upper floors of commercial buildings - i.e., office, hotel, industrial businesses. (The survey, therefore, did not include retail stores and restaurants, which have more flexibility to locate on the ground floor of many of types of buildings.)

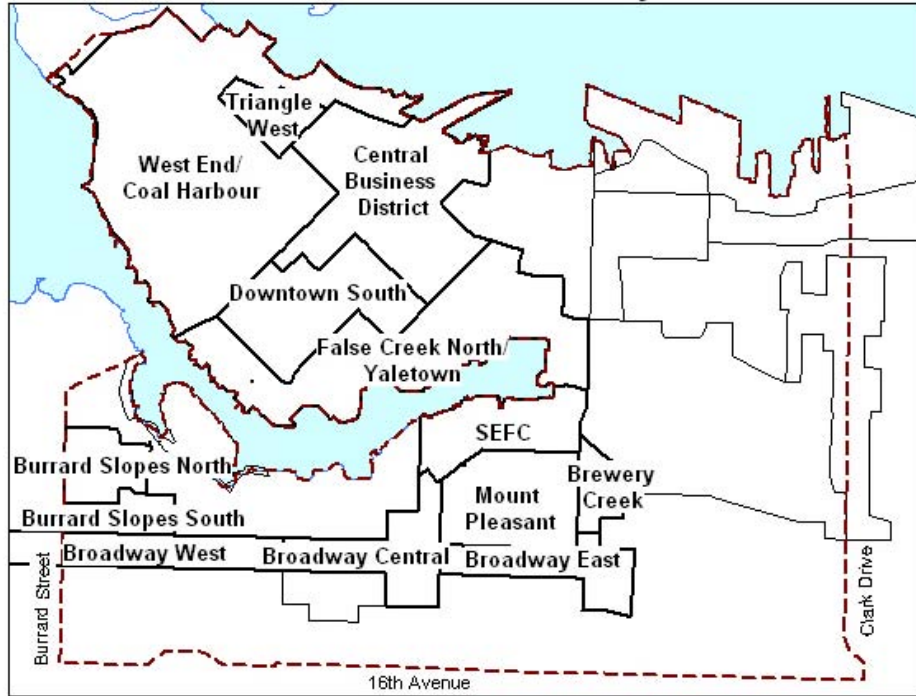
In total, 1,200 completed surveys were returned, for a response rate of 23%. In order to encourage participation, businesses were sent follow-up reminder postcards after the initial survey mail out. All questionnaires were completed between the dates of June 8 and July 7, 2005.

Overall results are accurate to ± 2.8 percentage points, nineteen times out of twenty. Due to the nature of mail-back surveys, businesses responding to this survey are not randomly selected; however, the high response rate (23%) does make the response likely to be valid as to overall results. At the same time, due to the wide variety of businesses and areas included in the survey, there may be some distinctions among types of businesses or areas that may not be revealed until further analysis by City staff. Distinctions among types of businesses or areas are only statistically significant where the sample size is equal to or greater than 100.

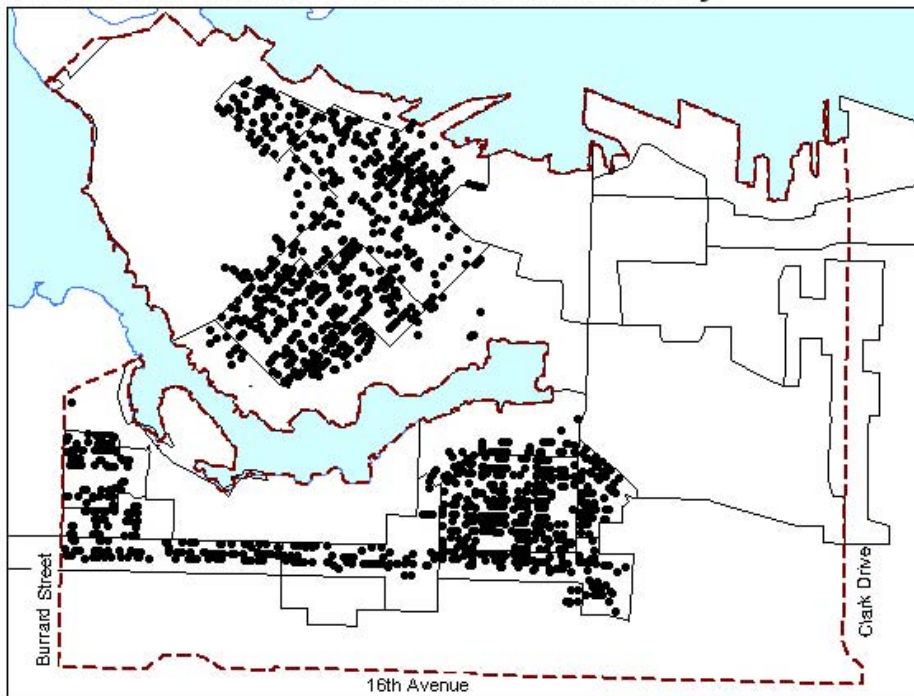
There are two maps and a chart below. The first map below shows the names and boundaries of the various geographic areas within the Metropolitan Core that were included in the survey. The second map shows the actual locations in these areas of the surveyed businesses. The accompanying chart indicates the number of completed surveys for each of the geographic areas.



Metro Core - Business Areas in the Survey



Metro Core - Business Locations in the Survey



Number of completed surveys by geographic location

Location	Number of Completed Surveys
Central Business District	534
Downtown South	124
Broadway Central	97
Mount Pleasant	96
Broadway West	74
False Creek North/Yaletown	69
Broadway East	42
Burrard Slopes North	35
Triangle West	33
West End/Coal Harbour	32
Burrard Slopes South	29
SEFC	18
Brewery Creek	17



DETAILED FINDINGS

Profile of Businesses

Business Activity

Companies in the survey represent a wide variety of businesses. Using the North American Industry Classification System (NAICS; see Appendix A), the three most common business activities include legal, accounting, and consulting services (15%), health care and social assistance (13%), and design, scientific, and technical services (12%).

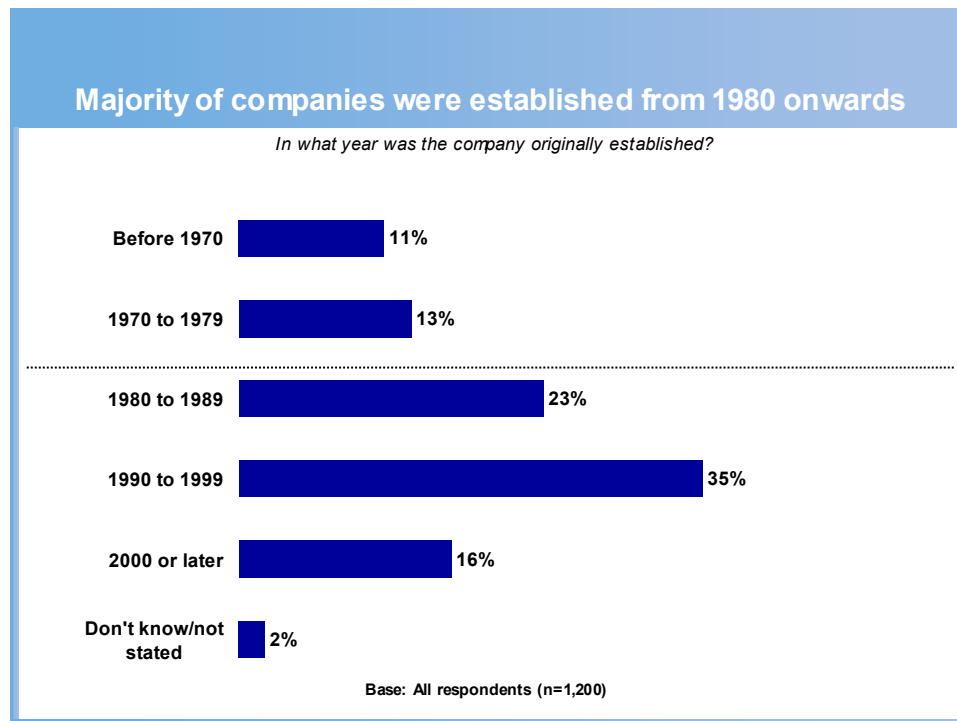
**Business activities vary –
legal, accounting, consulting services top the list**

Please describe your main business activity, including what goods you produce or sell, and what services you provide, at the business address indicated at the top.

	All Respondents (n=1,200) %		All Respondents (n=1,200) %
Legal, accounting, consulting Services	15	Primary & utilities	3
Health care and social assistance	13	Information and cultural industries	3
Design, scientific, technical services	12	Arts, entertainment and recreation	3
Finance and insurance	8	Transportation and warehousing	2
Manufacturing	6	Management of companies and enterprises	2
Real estate and rental and leasing	6	Construction	1
Administrative and support, waste management and remediation services	6	Accommodation services	1
Wholesale trade	4	Food services and drinking places	1
Retail trade	4	Religious, social, business organizations	1
Educational services	4	Public administration	<1
Repair and personal services	4		

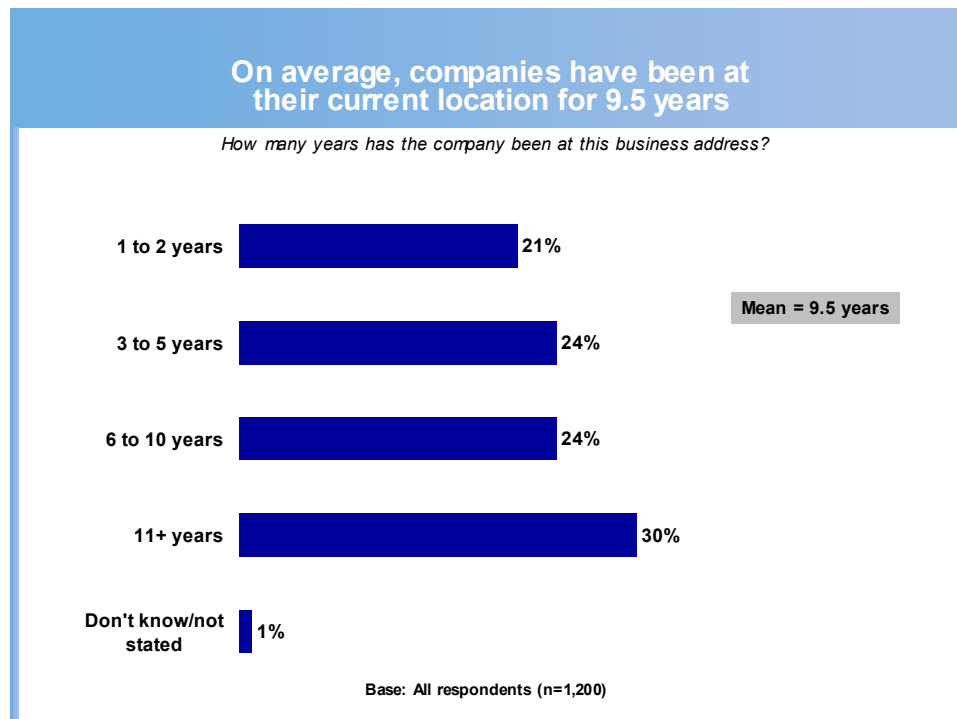
Year Established

Roughly three-quarters (74%) of businesses in the survey were established from 1980 onwards. More specifically, 23% were established between 1980 and 1989, 35% were established between 1990 and 1999, and 16% have been established since 2000. Meanwhile, one-quarter of businesses (24%) were established before 1980 (13% between 1970 and 1979 and 11% prior to 1970).



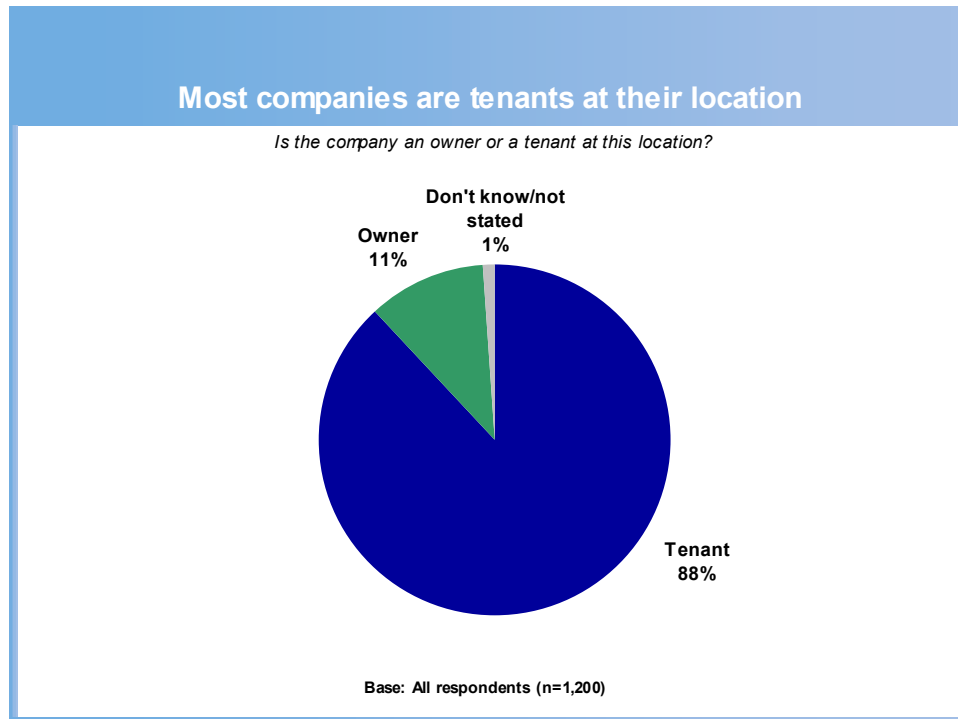
Number of Years at Current Location

Companies have been at their current business address for varying amounts of time. On average, companies have been at their current location for a total of 9.5 years.



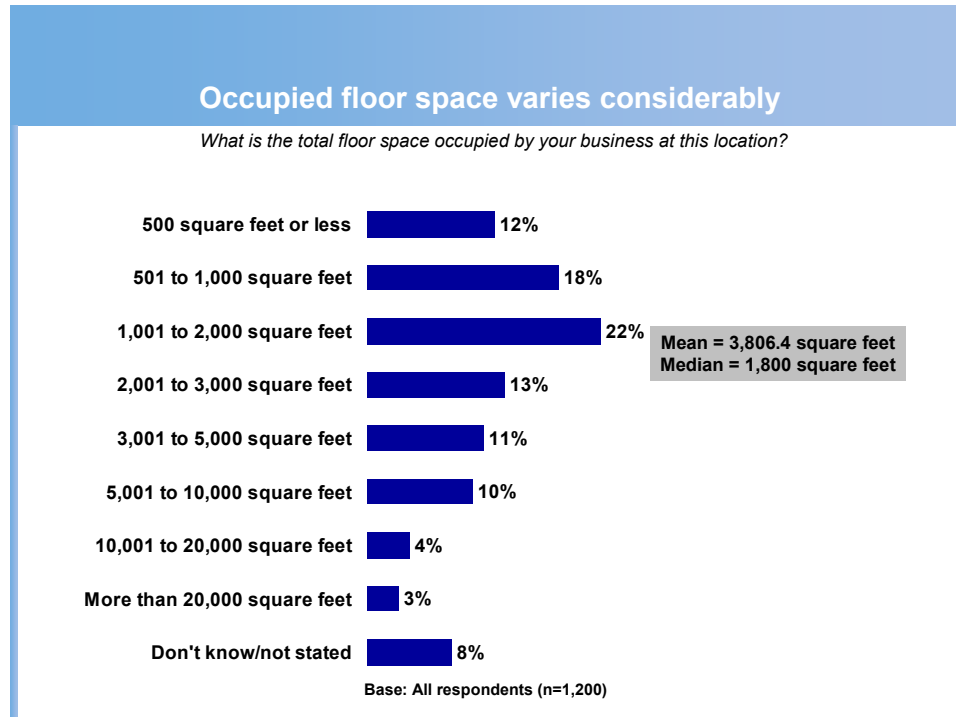
Tenure

Companies are much more likely to rent rather than own their current business location. In total, 88% of businesses say they are tenants at this location, while just 11% are owners.



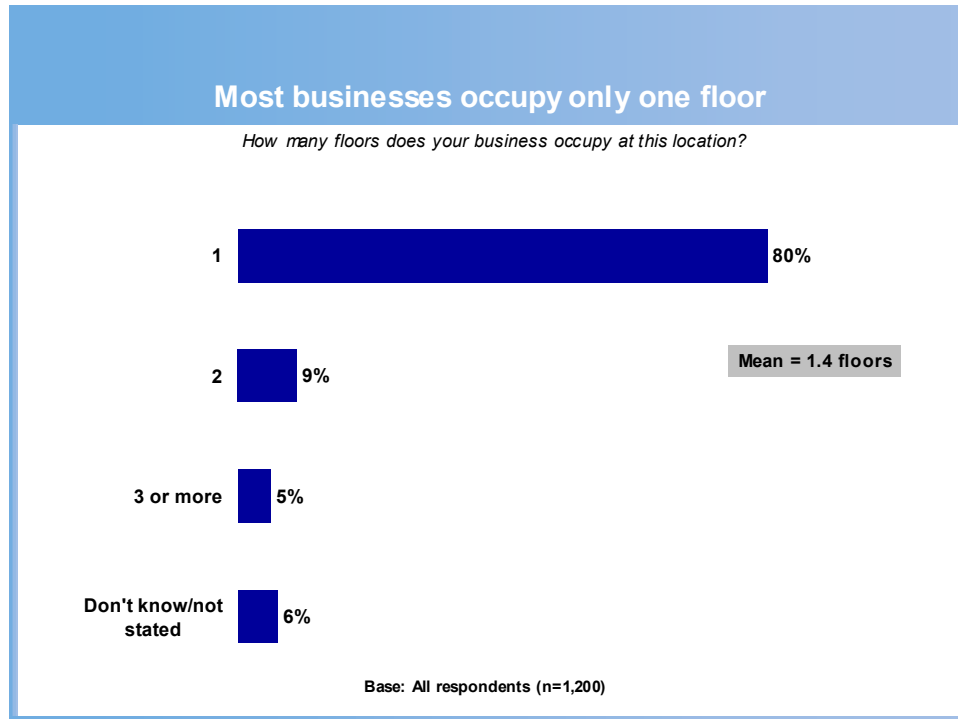
Total Floor Space

The amount of occupied floor space varies considerably from business to business. Sizes range from less than 500 square feet to over 20,000 square feet. On average, businesses are found to occupy roughly 3,806 square feet. Half of businesses occupy less than 1,800 square feet and half occupy more than 1,800 square feet.



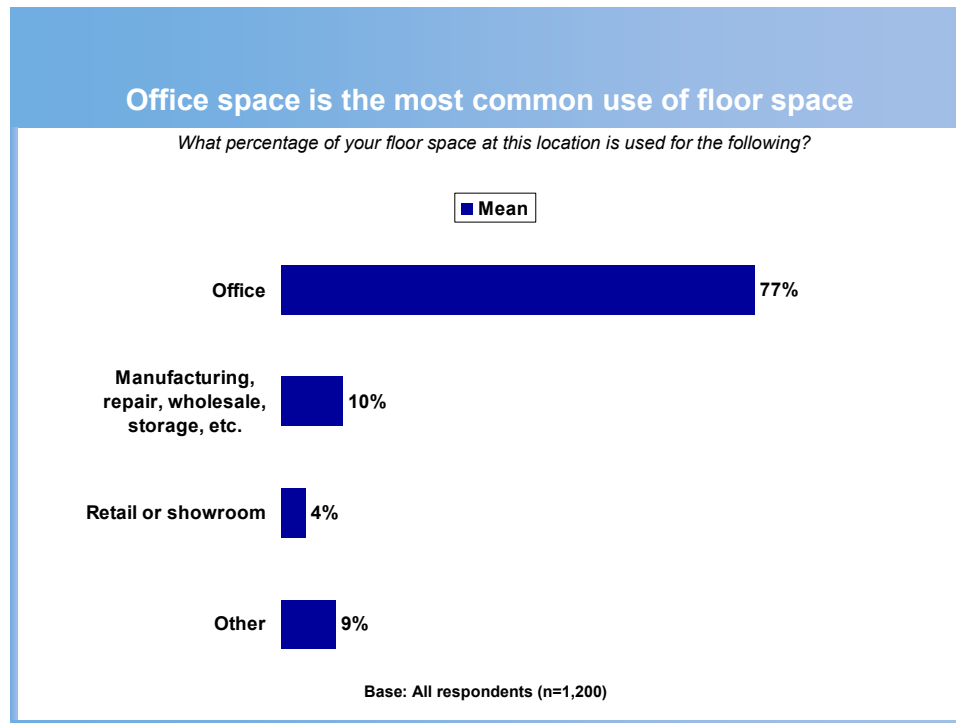
Number of Occupied Floors

The majority (80%) of businesses only occupy one floor. The average number of occupied floors is only slightly higher, standing at 1.4 floors.



Floor Space Uses

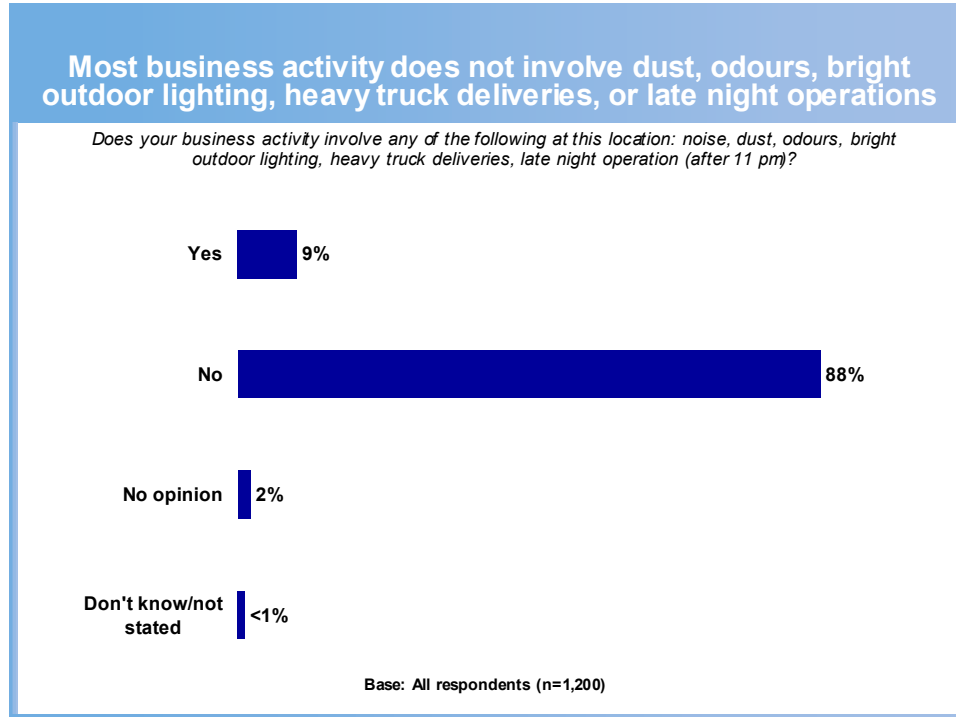
Office space is by far the most common use of floor space among businesses in the survey. On average, 77% of businesses' floor space is used as office space. A much smaller percentage is used for manufacturing, repair, wholesale, storage, etc. (average of 10%) and retail or showroom (average of 4%). Meanwhile, an average of 9% of floor space is used for some reason other than those purposes already listed¹. (It should be noted that retail stores and restaurants were not intended to be part of the survey.)



¹ Due to the self-report nature of mail surveys, percentages do not add to 100%.

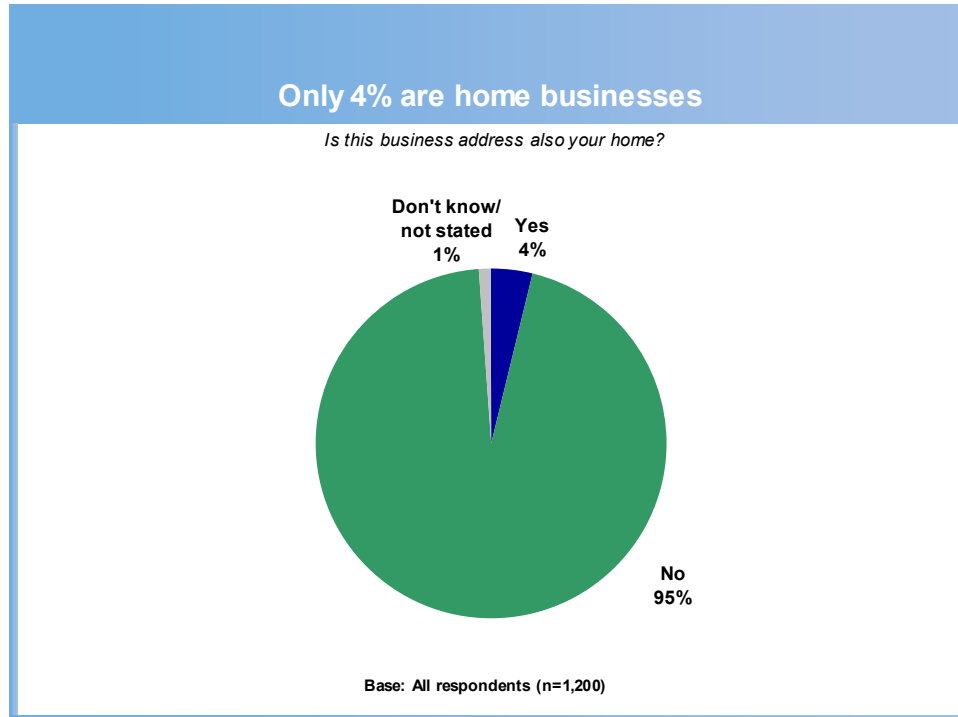
Other Aspects of Business Activity

Very few businesses conduct activities that involve noise, dust, odours, bright outdoor lighting, heavy truck deliveries, or late night operations. In total, only 9% of companies say their business activity involves the above components.



Home Businesses

The intention of the survey was to find out about businesses located in commercial and industrial buildings, and to exclude residential areas. Nevertheless, a small portion of home businesses were picked up by the survey. In total, 4% of companies indicate that their business address is also their home address.



Business Location Factors

Importance of Location Factors

Some factors are deemed much more important than others when deciding on a business location. It should be noted that the location factor “in a heritage district” is not as applicable because most heritage areas were not included in this phase of the survey.

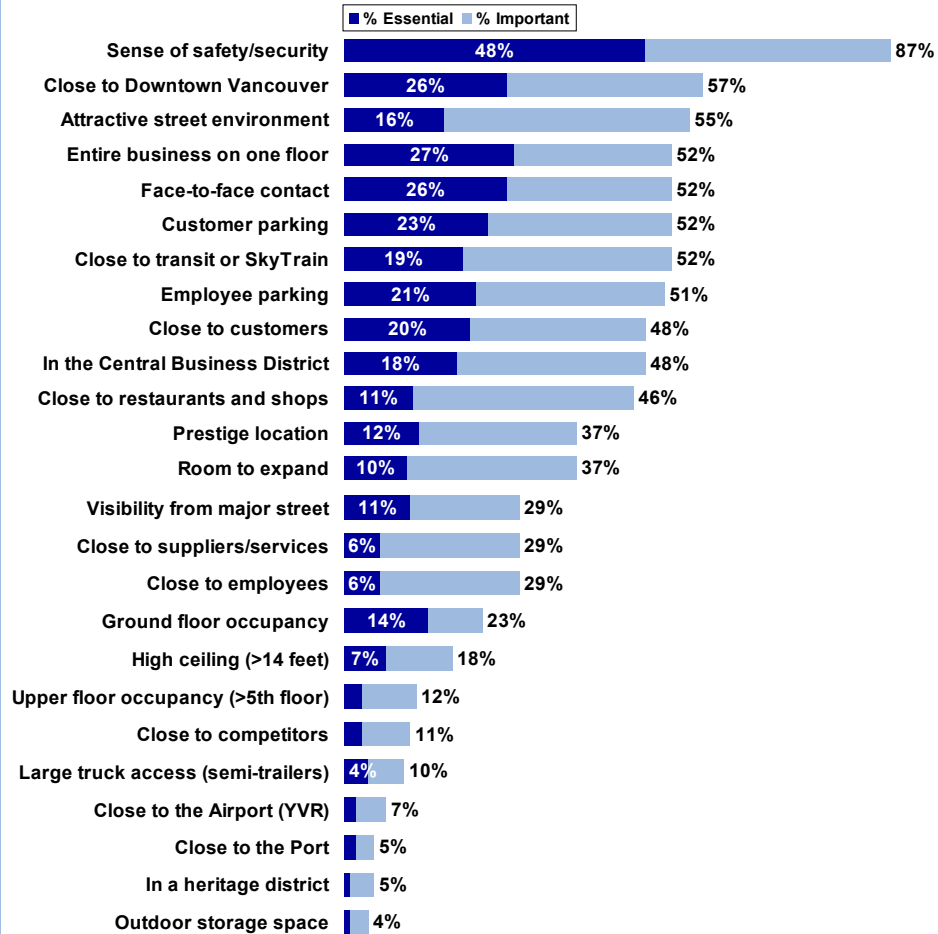
Overall, businesses say that a “sense of safety and security” is the most important factor taken into consideration, with 87% saying this is either “essential” (48%) or “important” (39%). The high proportion of “essential” responses highlights the level of importance attached to working in a safe and secure environment.

In comparison to safety, all other location factors are rated much lower in importance. Nonetheless, a number of factors are still perceived as “essential” or “important” by the majority of businesses, with the highest of these being “close to Downtown Vancouver” (57% overall, 26% “essential”).

The least important location factor is “outdoor storage space” (4% overall, 1% “essential”).

Safety is the most important location factor

Please indicate how important each factor is to you in deciding on a location for your business.

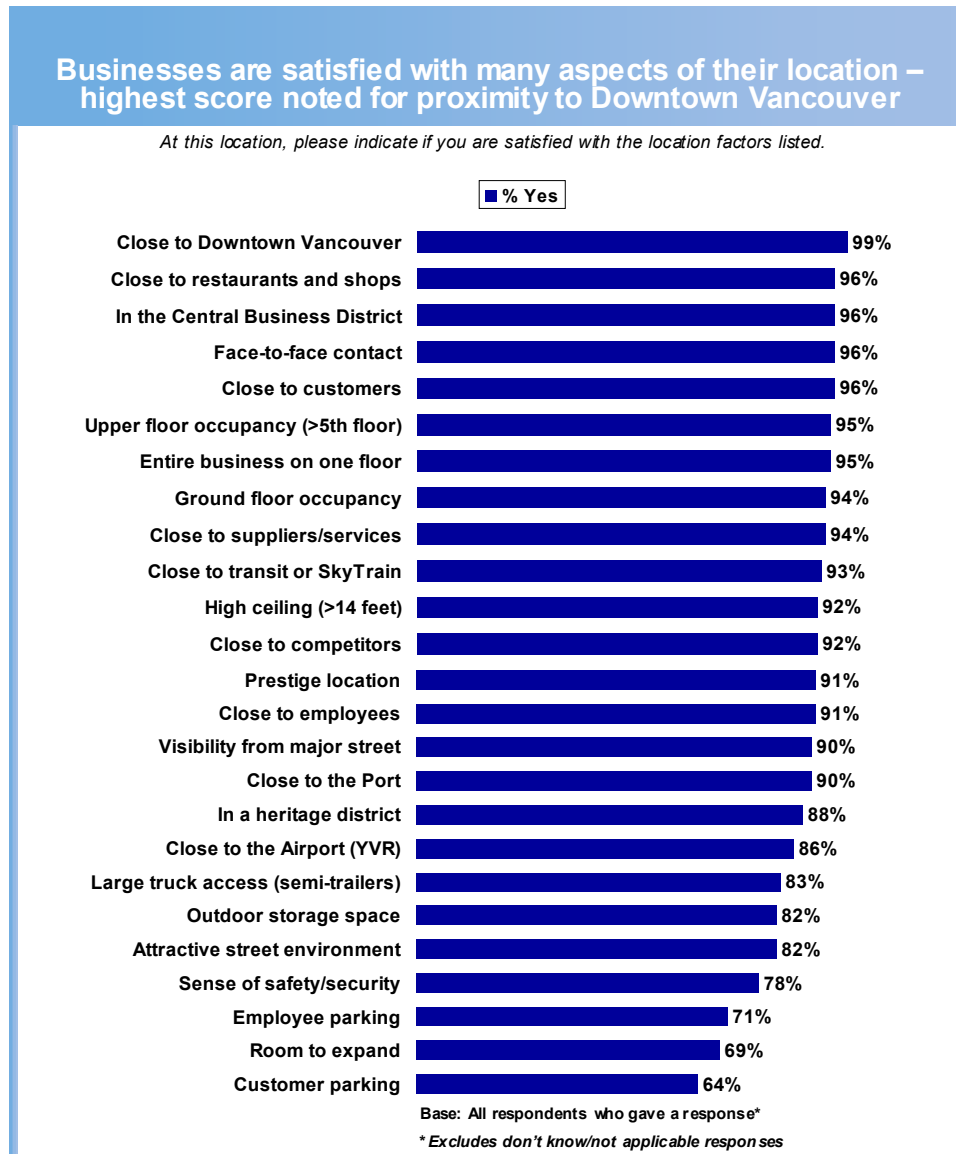


Base: All respondents (n=1,200)



Satisfaction with Location Factors

For the most part, businesses appear highly satisfied with their location². Nonetheless, it is apparent that some location factors achieve higher satisfaction scores than others. The level of satisfaction ranges from 99% for “close to Downtown Vancouver” to 64% for “customer parking”.



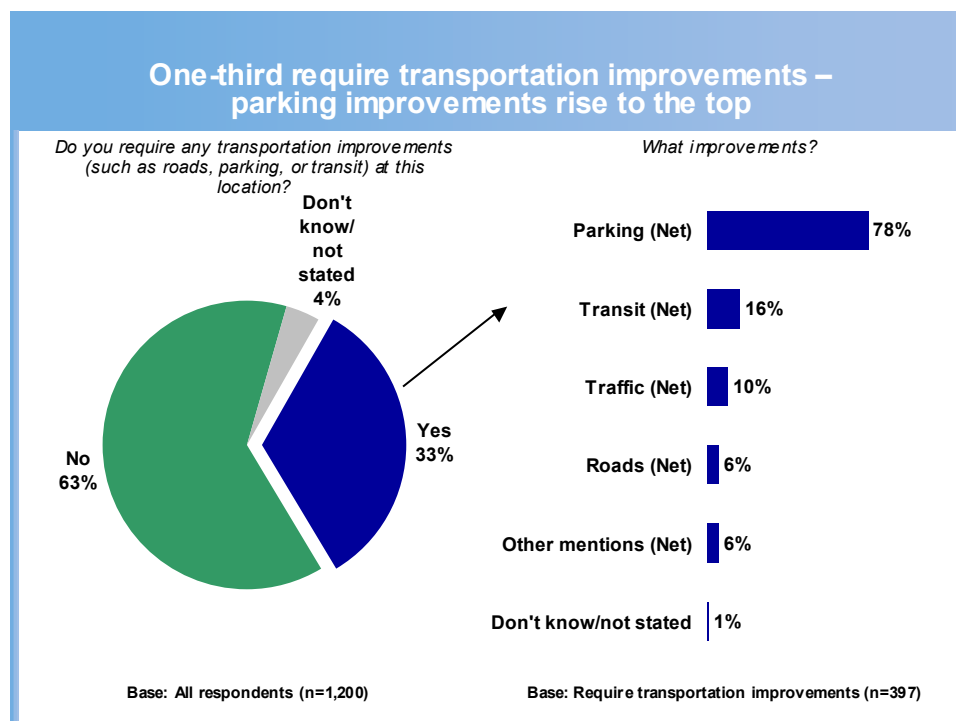
² Satisfaction scores exclude don't know/ not applicable responses.

Transportation Improvements

Most businesses in the survey do not require any transportation improvements (such as road, parking, or transit) at their location. In total, one-third (33%) of businesses say they are in need of such transportation improvements.

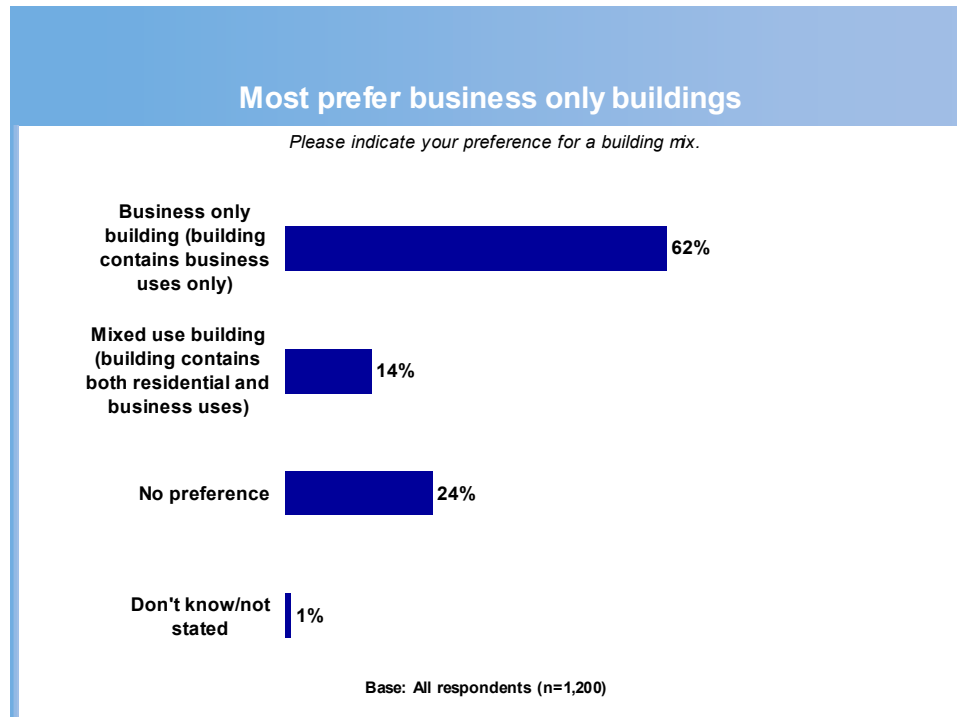
Overall, parking appears to be the area most in need of improvement, mentioned by 78% of those businesses that say they require transportation improvements. More specifically, many of these businesses point to a need for a greater level of parking – related mentions include “more parking” (19%), “more customer parking” (11%), “street/meter parking” (8%), “more employee/staff parking” (4%), “more leased/tenant parking” (3%), “more all day parking” (2%), “more underground parking” (1%), and “parking for tour buses/big trucks” (1%). Another issue related to parking is affordability – 10% mention “cheaper/more affordable parking”, while another 4% mention “free parking/free parking spaces”. Meanwhile, one-quarter (24%) simply make unspecified “parking” mentions.

Other transportation improvements that are required by businesses relate to transit (16%), traffic (10%), and roads (6%). Transit mentions primarily focus on a need for “improved/better bus or transit services” (10%) or “closer SkyTrain/street car station” (4%), while traffic improvements focus on a need for an “improved traffic flow” (6%). Meanwhile, perceived improvements related to roads vary – the two most common mentions include “fix/repair the roads, streets, and pot holes” (2%) and “fix the sidewalks/curbs” (2%).



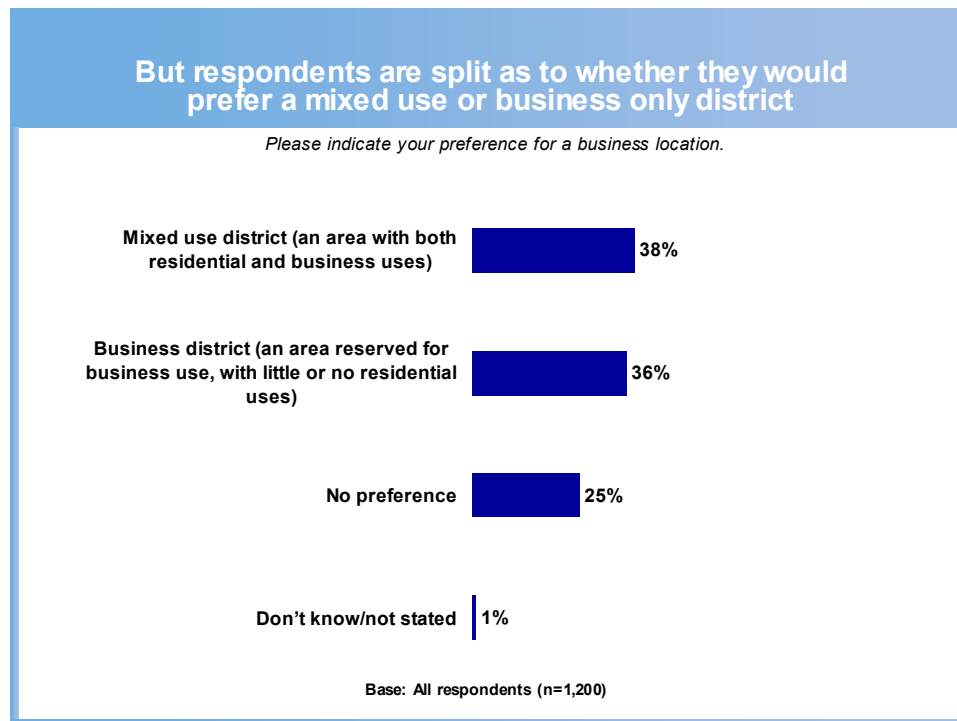
Building Composition

Businesses in the survey show a definite preference for business only buildings (those that contain business uses only). In total, 62% of companies say they prefer business only buildings, compared to just 14% who prefer mixed use buildings (contain both residential and business uses). Another one-quarter (24%) have no preference one way or the other.



Business Location Composition

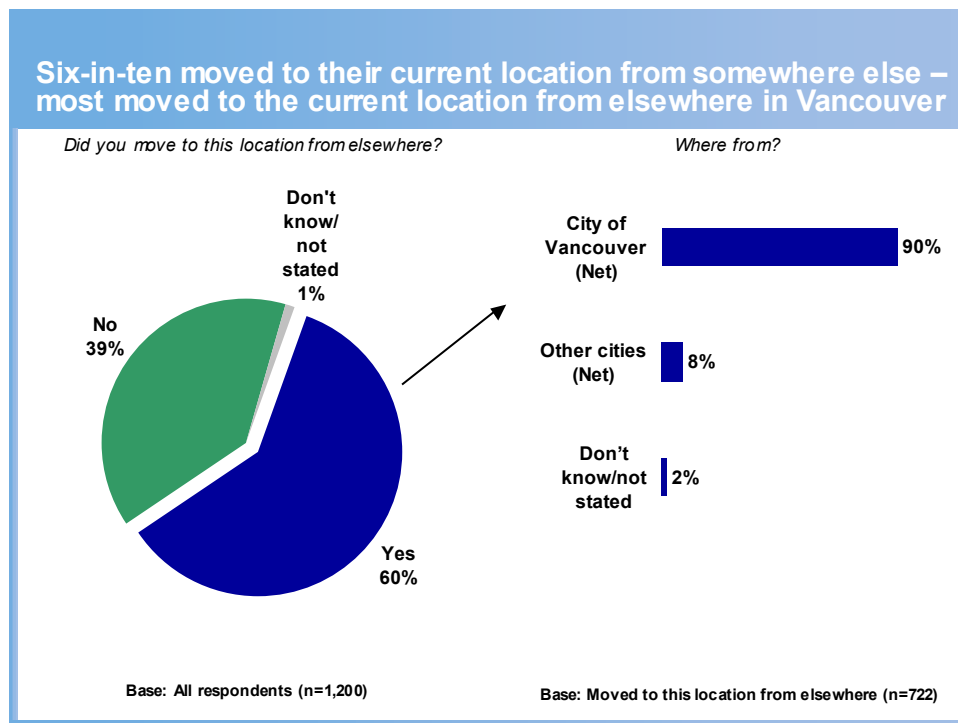
While companies demonstrate a definite preference for business only buildings, they are split regarding their preference for the composition of their general business location. For example, 38% of companies prefer mixed use districts (areas with both residential and business uses), while an equal proportion (36%) prefer business districts (areas reserved for business use, with little or no residential uses). Again, one-quarter (25%) of companies do not have a preference one way or the other.



Moving Locations

It is relatively common for businesses to have moved to their current location from somewhere else. In all, six-in-ten (60%) respondents indicate that they moved to their current location from elsewhere.

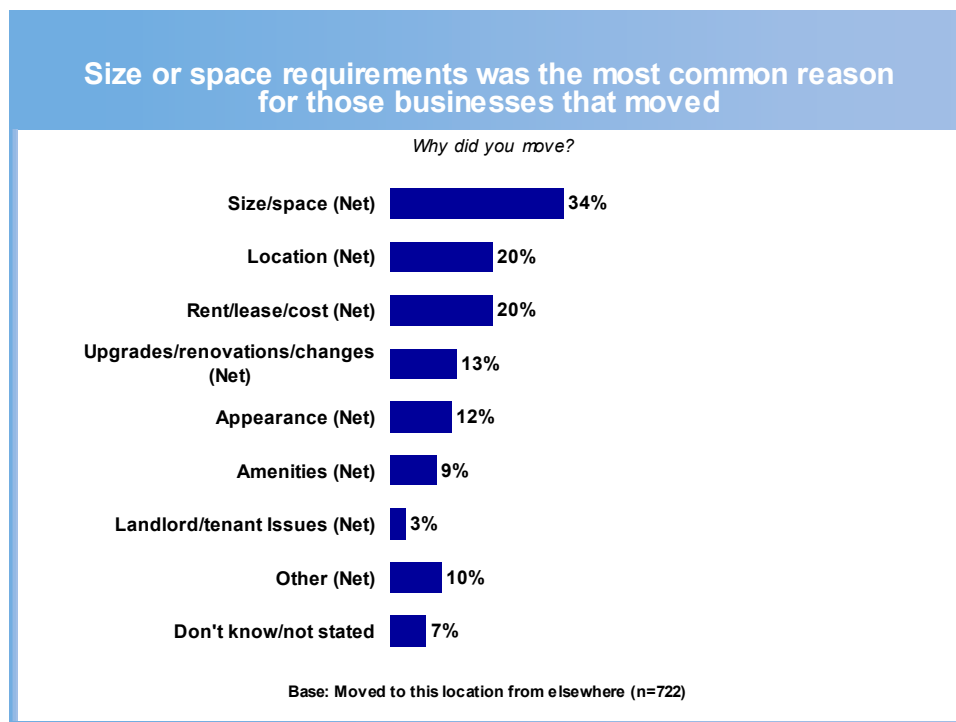
Of the 722 businesses that moved from another location, nine-in-ten (90%) indicate that they moved from elsewhere in Vancouver. Another 8% of these businesses moved from a different city.



Businesses who moved from another location offer a number of reasons as to why they decided to change locations. Overall, size/space issues top the list, mentioned by 34% of these businesses. More specifically, many of these businesses indicate that they changed locations because their previous location was too small to accommodate their needs. For example, 23% say they moved because they “needed a bigger place or office space”, 7% moved because they “needed to hire more people because the company was expanding”, and 1% needed a “bigger building”.

Meanwhile, location (20%) and rent/lease/cost of their original building (20%) are two other reasons offered as to why businesses decided to change locations. The main factors related to location include “wanted/found a better location in a nicer area” (7%), “to be closer to customers, clients, and suppliers” (5%), and “wanted a downtown location” (5%). Reasons related to rent/lease/cost include “rent was too high/found cheaper rent elsewhere” (12%) and “lease expired” (7%).

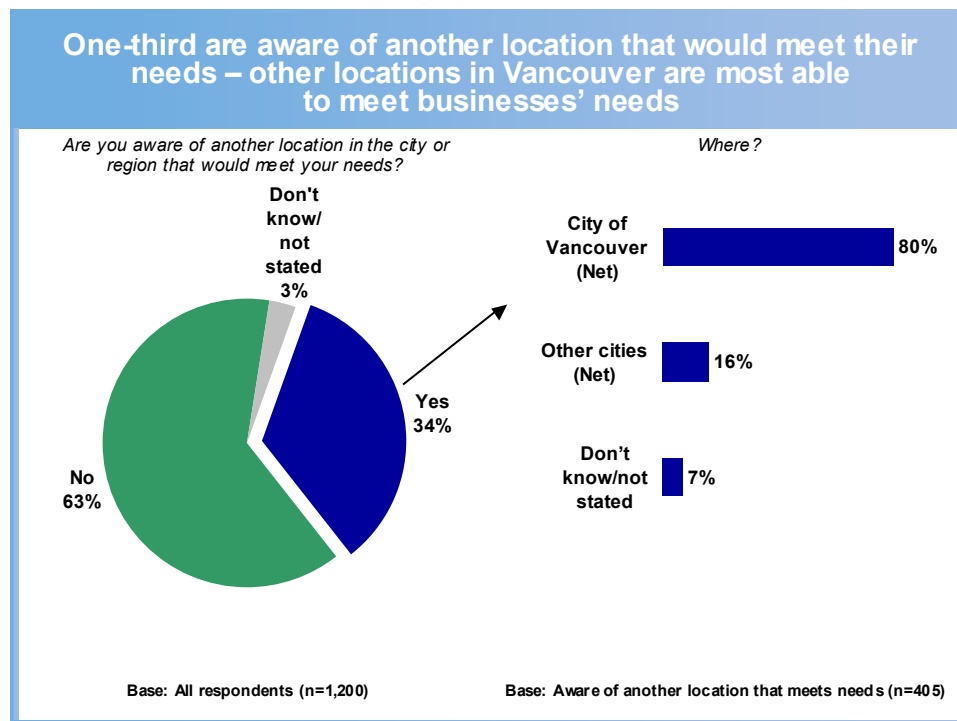
Other reasons for moving to their current location include upgrades/renovations/changes (13%) and appearance (12%).



Other Suitable Locations

The majority of businesses do not believe there is another location in the city or region that would meet their needs (63% feel this way). One-third (34%) indicate they are aware of such a location.

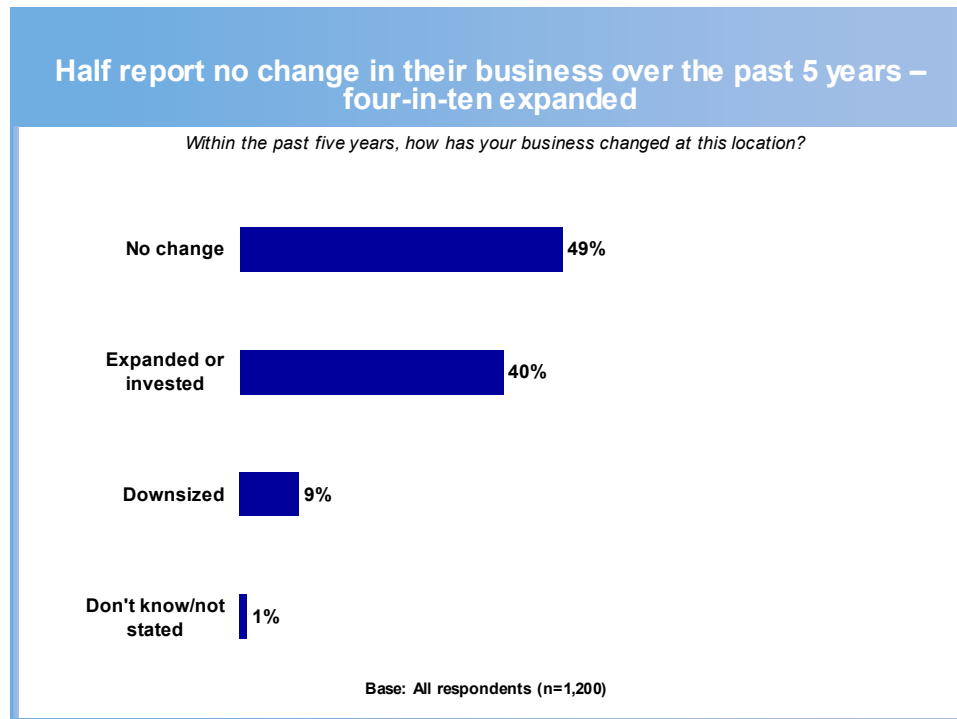
Of the 405 businesses aware of another location that would be able to meet their needs, eight-in-ten (80%) indicate that this location is elsewhere in Vancouver. Another 16% mention a location in a different city.



Business Plans

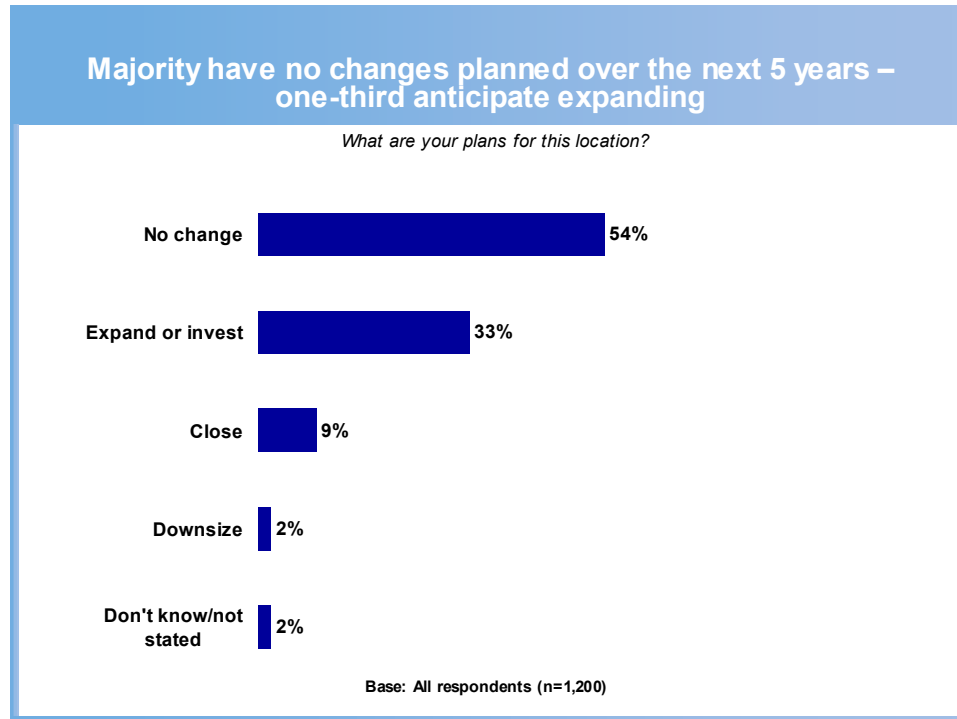
Past Five Years

In total, half (49%) of respondents indicate that they did not change their business (in terms of expanding or downsizing) within the past five years. Another four-in-ten (40%) say they expanded or invested during this timeframe, while one-in-ten (9%) downsized.



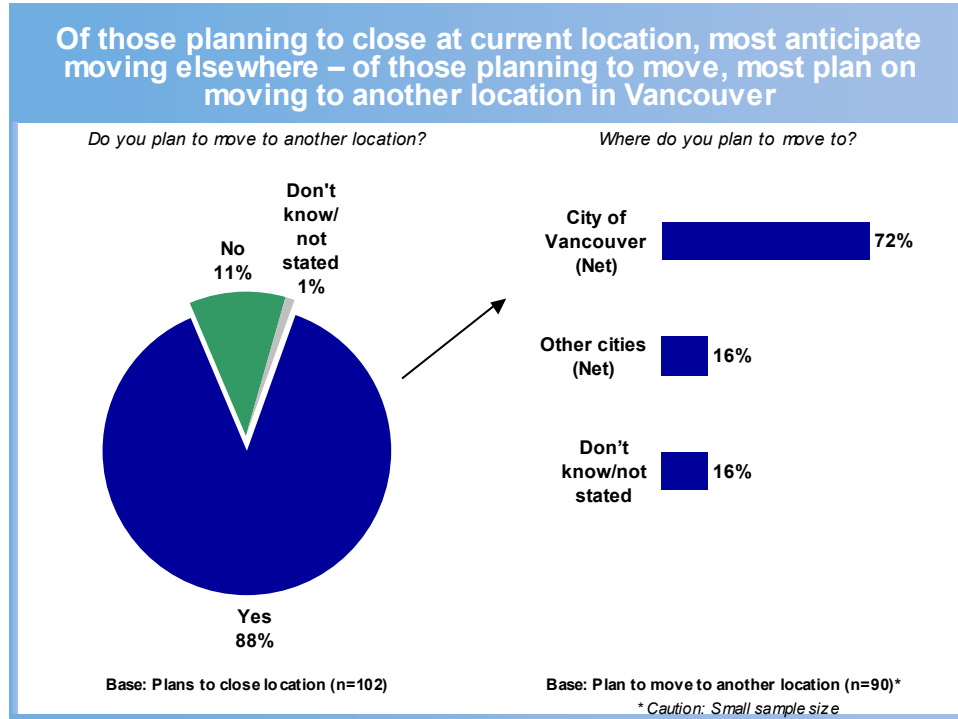
Future Plans

Meanwhile, looking at businesses' future plans shows that the majority (54%) have no plans to downsize, expand, or close their current location. One-third (33%) anticipate expanding or investing, while another 9% intend to close and 2% will be downsizing.



Of the 9% of businesses that plan to close their current location, the majority indicate that they are closing to move to another location (88%).

Of the 90 businesses that are planning to move to a new location, the majority (72%) anticipate moving elsewhere in Vancouver. Another 16% say they will move to a different city.



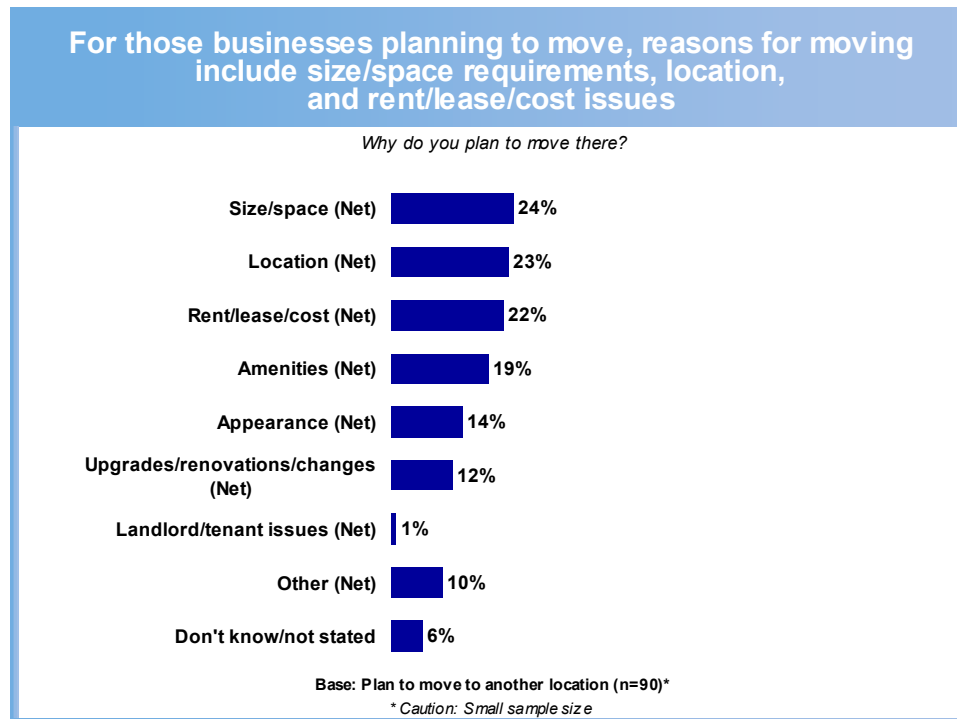
The 90 businesses that anticipate moving to a new location provide several reasons as to why they have made this decision. The three most common reasons why businesses are planning to move include size/space requirements, location, and rent/lease/cost issues.

In total, one-quarter (24%) of these businesses mention issues related to size and space. More specifically, they point to a “need for a bigger place or office space” (16%) and a “need to hire more people/company is expanding” (8%).

Meanwhile, 23% mention location as a reason why they plan to move to a new location – here the top mentions include “to be closer to clients, customers, and suppliers” (9%), “to be closer to home or employees” (7%), “want/found a better or nicer location/area” (6%), and “too much traffic in current area/want a location with less traffic” (6%).

Another 22% indicate that rent/lease/cost issues are behind their plans to move to a new location. Here, the primary reason is “rent is too high/found a cheaper rent elsewhere”, mentioned by 16% of businesses.

Other reasons for moving to a new location include amenities (19%), appearance (14%), and upgrades/renovations/changes (12%).



Customer Information

Businesses provide goods and services to customers in a number of different geographic locations, with the bulk of customers centred in the Lower Mainland and more than half in the City of Vancouver itself. Overall, the largest proportion of businesses' goods and services are provided to customers in the Metropolitan Core (33%, on average); another 20% go to customers in the rest of the City of Vancouver, and 22% go to customers elsewhere in the Lower Mainland. Meanwhile, an average of 26% of businesses' goods and services are provided to customers outside the Lower Mainland³.

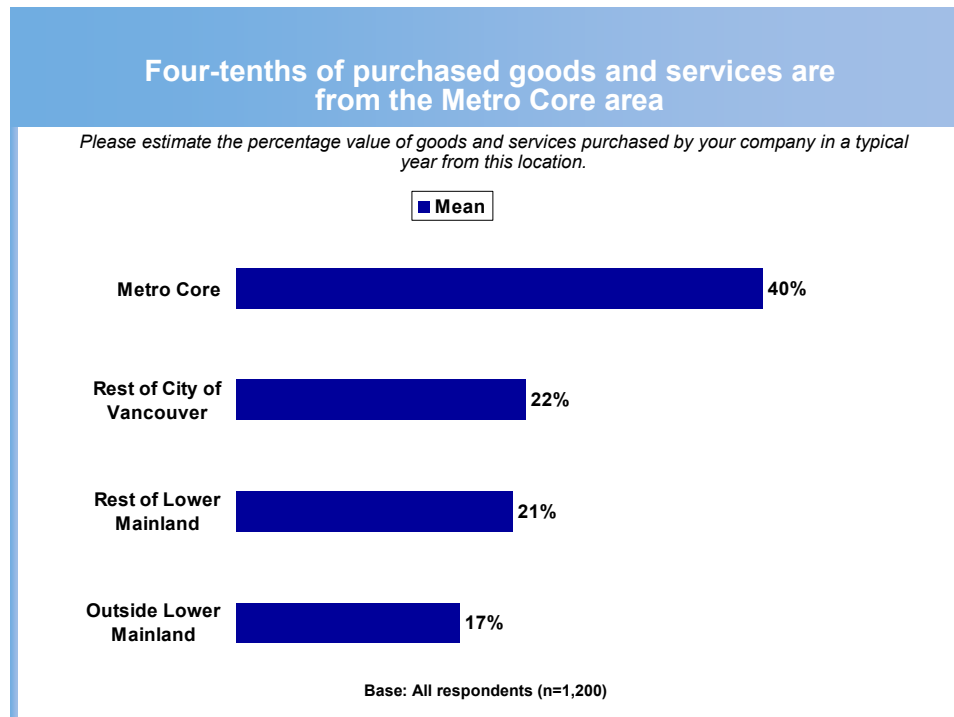


³ Due to the self-report nature of mail surveys, percentages do not add to 100%.



Supplier Information

Similarly, businesses also purchase goods and services from a number of different geographic locations, with over half of this purchasing within the City of Vancouver. Overall, an average of 40% of businesses' goods and services are purchased in the Metropolitan Core; another 22% are purchased in the rest of the City of Vancouver and 21% are purchased in the rest of the Lower Mainland. Only 17% (on average) of businesses' goods and services are purchased outside the Lower Mainland⁴.



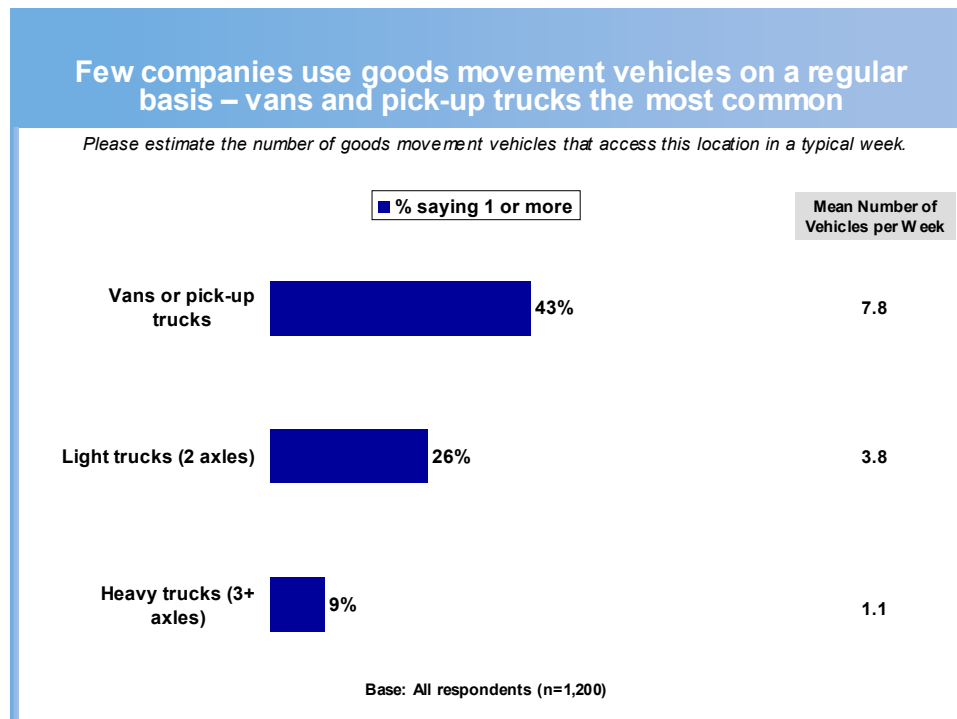
⁴ Due to the self-report nature of mail surveys, percentages do not add to 100%.



Transportation Needs

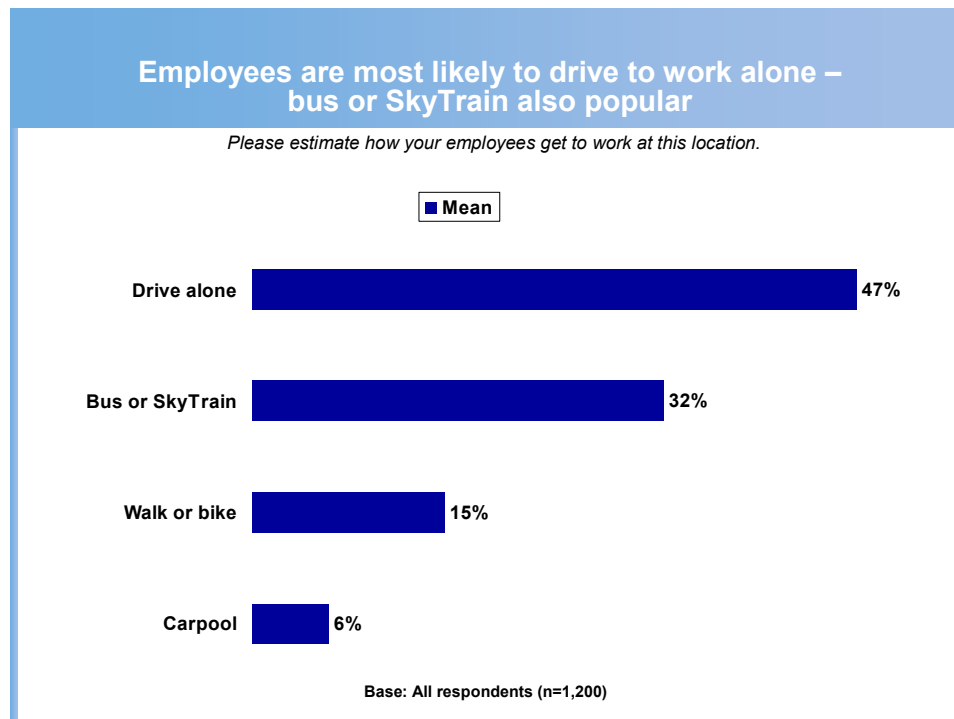
For the most part, the majority of companies do not use goods movement vehicles at their location on a regular basis. Vans and pick-up trucks are the most commonly used goods movement vehicles, with 43% of businesses indicating that these types of vehicles access their location on a weekly basis. This drops even further when considering access by light trucks (26% of businesses are accessed by light trucks on a weekly basis) and heavy trucks (9%).

Looking at the actual number of these types of vehicles accessing a location in a typical week shows that an average of 7.8 vans or pick-up trucks access businesses. This drops to an average of 3.8 light trucks and to an average of 1.1 heavy trucks.



Journey to Work

Businesses estimate that, on average, 47% of their employees drive to work alone. Public transit is the next most popular transportation method, with an average of 32% of employees taking the bus or SkyTrain to work. Employees are much less likely to walk or bike to work (average of 15%) or carpool (average of 6%)⁵.



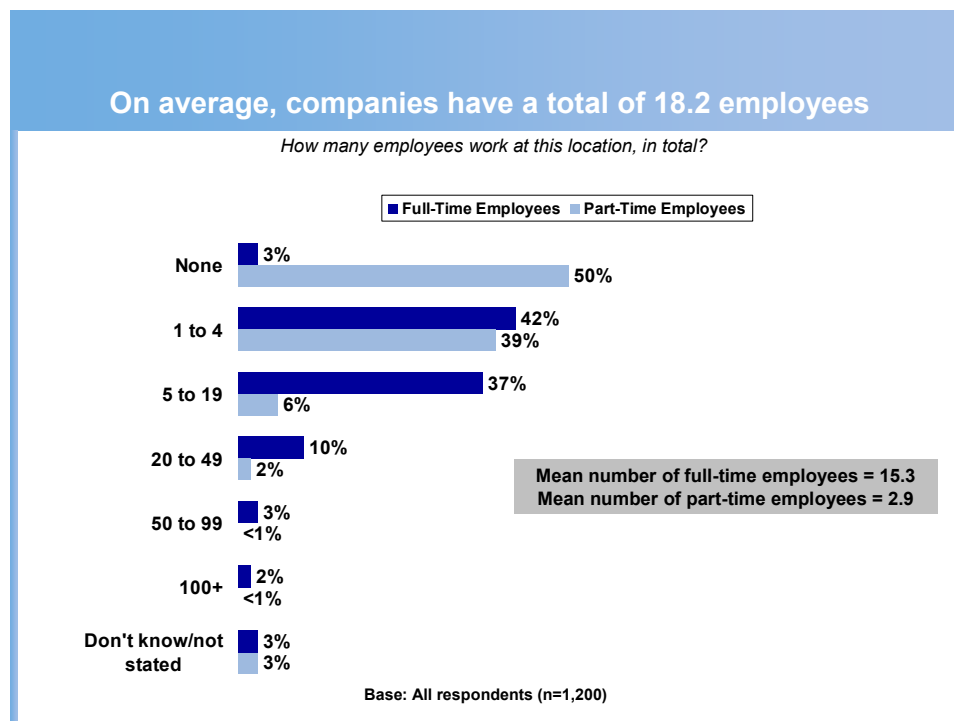
⁵ Due to the self-report nature of mail surveys, percentages do not add to 100%.



Employee Information

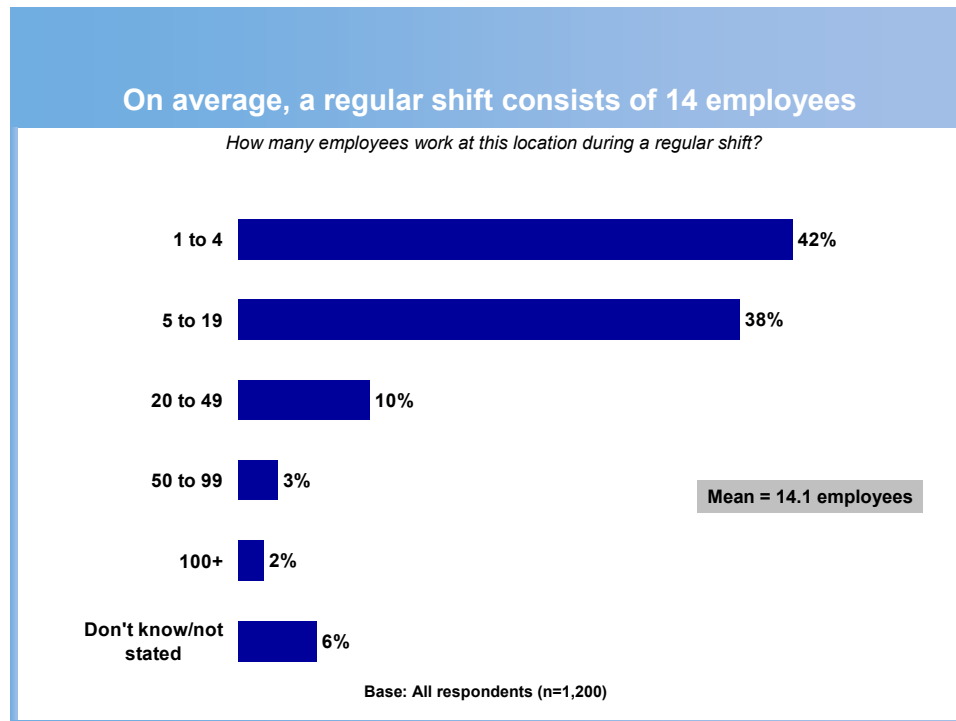
Number of Employees

On average, businesses employ a total of 18.2 employees – 15.3 of these employees work full time, while 2.9 are employed part time.



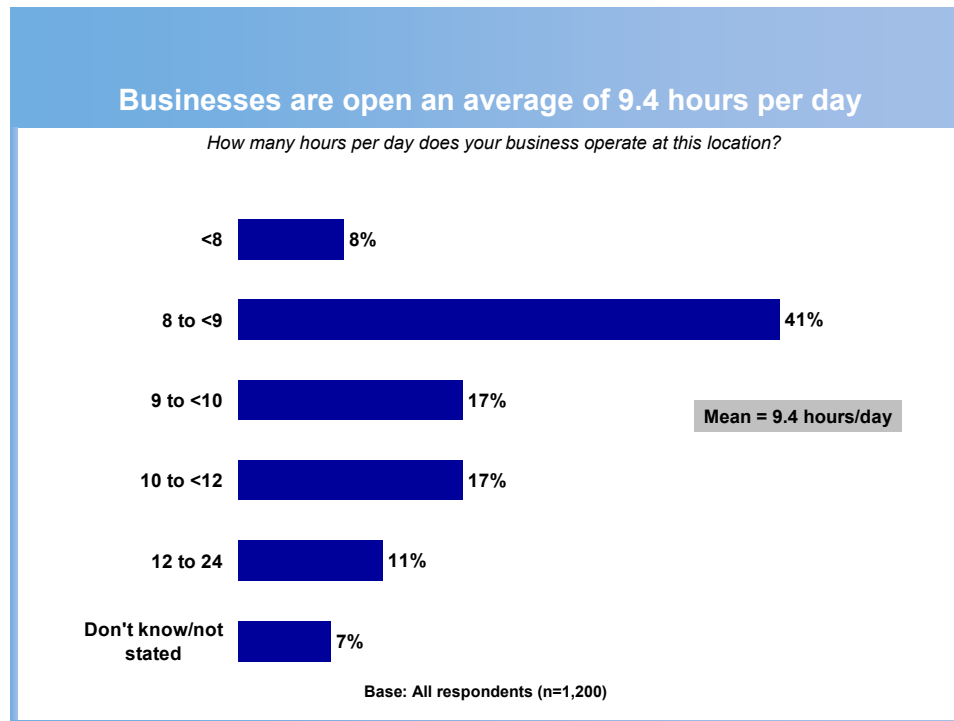
Number of Employees During a Shift

While businesses employ a total of 18.2 employees (on average), an average of 14.1 employees are present during a regular shift.



Business Hours

On average, businesses are open for 9.4 hours per day.



Vancouver Employees

In total, more than half of businesses' employees live in the City of Vancouver (average of 55%).



Businesses' Final Thoughts

At the end of the survey, businesses were asked if they had any suggestions or concerns that they would like City Hall to know about. In total, 460 of the 1,200 businesses surveyed provided a response.

Among these businesses, concerns related to safety and security rise to the top (36%). More specifically, businesses point to “too many homeless people/panhandlers in the area” (22%), general “safety and security issues” (11%), “get rid of drug users/crack users in the area” (8%), “too many break-ins/thefts in the area” (5%), and “improve the crime situation” (5%).

Other areas of concern are:

- ◆ Traffic and roads (16%) – primarily includes mentions of “improve traffic congestion” (9%)
- ◆ Parking (15%) – primarily includes mentions of “more parking/parking lots” (8%)
- ◆ Zoning (12%) – primarily includes mentions of “relax zoning laws” (5%) or “tighter/tighten zoning laws” (4%)
- ◆ Cost (11%) – primarily includes mentions of “business taxes are too high” (8%)
- ◆ Public transit (10%) – primarily includes mentions of “improve transit system” (7%)

Businesses' suggestions and concerns for City Hall	
<i>Do you have any suggestions or concerns that you would like City Hall to know about?</i>	
Suggestions/Concerns	Respondents Providing a Response (n=460) %
Safety/security issues	36
Traffic/roads issues	16
Parking issues	15
Zoning issues	12
Cost issues	11
Public transit issues	10
Cleaning/cleanliness issues	6
Beautification issues	6



APPENDIX

Appendix A: NAICS Codes

The NAICS coding that was used to classify business activity can be found below.

NAICS (1997) codes used to classify business activity
11, 21, 22 – Primary and Utilities
23 – Construction
31-33 – Manufacturing
41 – Wholesale Trade
44-45 – Retail Trade
48-49 – Transportation and Warehousing
51 – Information and Cultural Industries
52 – Finance and Insurance
53 – Real Estate and Rental and Leasing
54a – Legal, Accounting, Consulting Services (5411, 5412, 5416)
54b – Design, Scientific, Technical Services (5413, 5414, 5415, 5417, 5418, 5419)
55 – Management of Companies and Enterprises
56 – Administrative and Support, Waste Management and Remediation Services
61 – Educational Services
62 – Health Care and Social Assistance
71 – Arts, Entertainment and Recreation
72a – Accommodation Services (721)
72b – Food Services and Drinking Places (722)
81a – Repair and Personal Services (811, 812)
81b – Religious, Social, Business Organizations (813)
91 – Public Administration

Note:

- ◆ The following NAICS categories were combined into one:
 - 11 Agriculture, forestry, fishing, and hunting
 - 21 Mining and oil and gas extraction
 - 22 Utilities
- ◆ The following NAICS categories were split into two:
 - 54 Professional, scientific and technical services
 - 72 Accommodation and food services
 - 81 Other services (except public administration)

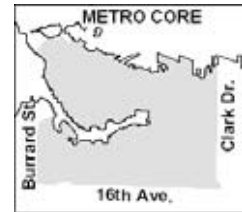
Appendix B: Questionnaire

An example of the questionnaire that was mailed to respondents can be found on the following page.





**CITY OF VANCOUVER
METROPOLITAN CORE BUSINESS SURVEY
2005**



Map 1. Metro Core

(Business Name)
(Mail Address 1)
(Mail Address 2)
(Mail Address 3)

Please take a few minutes to provide information about your business, located at the business address shown at the top of this page. Please note that the term "business" or "company" is used in the survey for any type of business or organization.

Information on individual businesses will be held in the strictest confidence.

BACKGROUND INFORMATION

1. Please describe your main business activity, including what goods you produce or sell, and what services you provide, at the business address indicated at the top.

2. In what year was the company originally established? _____ Year Established

3. How many years has the company been at this business address? _____ Years

4. Is the company an owner or a tenant at this location?

Owner Tenant

5. What is the total floor space occupied by your business at this location?

_____ Square Feet OR _____ Square Metres

6. How many floors does your business occupy at this location? _____ Floors

7. What percentage of your floor space at this location is used for the following:

Office	_____%
Retail or Showroom	_____%
Manufacturing, Repair, Wholesale, Storage, etc	_____%
Other	_____%
TOTAL	100%

8. Does your business activity involve any of the following, at this location: noise; dust; odours; bright outdoor lighting; heavy truck deliveries; late night operation (after 11 pm)?

Yes No No Opinion

9. Is this business address also your home address?

- Yes No

BUSINESS LOCATION FACTORS

10. Please indicate how important each factor is to you in deciding on a location for your business. Please circle one number for each factor in the list below.

11. At this location, please indicate if you are satisfied with the location factors listed. Please circle Yes, No or N/A (Not Applicable) in the column on the right.

BUSINESS LOCATION FACTORS	10. How important is each factor in deciding on a location for your business?				11. At your present location, are you satisfied with each factor?		
	<u>Essential</u>	<u>Important</u>	<u>Desirable</u>	<u>Not Important</u>	Yes	No	N/A
SPACE CHARACTERISTICS							
Ground floor occupancy	4	3	2	1	Yes	No	N/A
Upper floor occupancy (> 5 th floor)	4	3	2	1	Yes	No	N/A
Entire business on one floor	4	3	2	1	Yes	No	N/A
High ceiling (> 14 feet)	4	3	2	1	Yes	No	N/A
Room to expand	4	3	2	1	Yes	No	N/A
SITE CHARACTERISTICS							
Visibility from major street	4	3	2	1	Yes	No	N/A
Prestige location	4	3	2	1	Yes	No	N/A
Employee parking	4	3	2	1	Yes	No	N/A
Customer parking	4	3	2	1	Yes	No	N/A
Large truck access (semi-trailers)	4	3	2	1	Yes	No	N/A
Outdoor storage space	4	3	2	1	Yes	No	N/A
AREA CHARACTERISTICS							
Close to transit or SkyTrain	4	3	2	1	Yes	No	N/A
Close to restaurants and shops	4	3	2	1	Yes	No	N/A
In a heritage district	4	3	2	1	Yes	No	N/A
In the Central Business District	4	3	2	1	Yes	No	N/A
Attractive street environment	4	3	2	1	Yes	No	N/A
Sense of safety/security	4	3	2	1	Yes	No	N/A
BUSINESS LINKS							
Face-to-face contact	4	3	2	1	Yes	No	N/A
Close to customers	4	3	2	1	Yes	No	N/A
Close to suppliers/services	4	3	2	1	Yes	No	N/A
Close to competitors	4	3	2	1	Yes	No	N/A
Close to employees	4	3	2	1	Yes	No	N/A
Close to Downtown Vancouver	4	3	2	1	Yes	No	N/A
Close to the Port	4	3	2	1	Yes	No	N/A
Close to the Airport (YVR)	4	3	2	1	Yes	No	N/A

12. Do you require any transportation improvements (such as road, parking, or transit) at this location?

- Yes No

If you answered YES: What improvements? _____

13. Please indicate your preference for a building mix. **CHECK ONE.**
- Mixed use building (building contains both residential and business uses)
 - Business only building (building contains business uses only)
 - No preference
14. Please indicate your preference for a business location. **CHECK ONE.**
- Mixed use district (an area with both residential and business uses)
 - Business district (an area reserved for business use, with little or no residential uses)
 - No preference
15. Did you move to this location from elsewhere?
- Yes No
- If you answered YES: Where from? _____
- Why did you move? _____
- _____
- _____
16. Are you aware of another location in the city or region that would meet your needs?
- Yes No
- If you answered YES: Where? _____

BUSINESS PLANS

17. Within the past five years, how has your business changed at this location?
CHECK ONE.
- No change Expanded or Invested
 - Downsized
18. What are your plans for this location? **CHECK ONE.**
- No change Expand or Invest
 - Downsize Close
- If you answered CLOSE: do you plan to move to another location?
- Yes No
- If you answered YES:
- Where do you plan to move to? _____
- Why do you plan to move there? _____
- _____

CUSTOMER INFORMATION

19. Please estimate the % value of goods and services provided by your company in a typical year, from this location:

To Customers In:

Metro Core (see Map, p.1)	_____%
Rest of City of Vancouver	_____%
Rest of Lower Mainland	_____%
Outside Lower Mainland	_____%
TOTAL	100%

SUPPLIER INFORMATION

20. Please estimate the % value of goods and services purchased by your company in a typical year, at this location:

From Suppliers In:

Metro Core (see Map, p.1)	_____%
Rest of City of Vancouver	_____%
Rest of Lower Mainland	_____%
Outside Lower Mainland	_____%
TOTAL	100%

TRANSPORTATION NEEDS

21. Please estimate the **number** of goods movement vehicles that access **this location**, in a typical week:

Heavy trucks (3+ axles)	_____
Light trucks (2 axles)	_____
Vans or pickup trucks	_____

JOURNEY TO WORK

22. Please estimate how your employees get to work at **this location**:

Walk or Bike	_____%
Bus or Skytrain	_____%
Carpool	_____%
Drive alone	_____%
TOTAL	100%

EMPLOYEE INFORMATION

23. How many employees work at **this location**, in total?

Full Time Employees

Part Time Employees

(Less than 30 hrs per week)

24. How many employees work at **this location** during a regular shift? _____ Employees

25. How many hours per day does your business operate at **this location**? _____ Hours

26. Please estimate the % of your employees who live in the City of Vancouver: _____%

27. Do you have any suggestions or concerns that you would like City Hall to know about?

Please insert this survey in the postage paid envelope and mail by **JUNE 30, 2005**.

Or, you may FAX the survey to Ipsos-Reid at 604.688.9568.

Thank you for your co-operation!