

ROI of BIAs

CONSULTATION REPORT

February 2017



Return on Investment of **BIAs**



Toronto Association of
Business Improvement Areas



**BRAND
CLARITY**

ROI OF BIAS CONSULTATION REPORT

Prepared for OBIAA

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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 the study is to identify a set of common indicators for BIAs across the province which reflect the BIAs role in local economies and community development.

The consultative process throughout the project has been extensive and included a broad range of input from a full spectrum of BIAs, municipalities, and other stakeholders. The process was an iterative one whereby each step required an assessment of whether the continually refined indicators were addressing key criteria associated with the audience appeal, BIA story, and data availability.

Key consultation feedback and considerations:

- **Engagement:** While BIAs cited achieving member engagement as one of the top successes they had achieved, the Team also encountered a consultation process that required innovative engagement skills to encourage participation. Divergence on the approach and up take on engagement with both BIAs and their membership was evident throughout the project. As a result, representation across the province varied substantially. 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.
- **BIA Relevance:** Rather than being only a typical self-affirming study on the importance of BIAs, the study process challenged itself to constantly prove why each indicator was relevant, important, and necessary to telling the BIA success story. This story must be shared at all levels of government and between BIAs and their membership.
- **Uniqueness:** Each BIA should be recognized as unique and should not be forced into one-size-fits-all approach. The indicators 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.
- **Governance Model:** BIA governance model is being tested and pushed into different directions that challenge the traditional norms of BIAs only working on beautification and marketing. The stories during the interview process revealed and highlighted a vast array of unique successes that BIAs have achieved through pushing the limits of what the governance model allows. This has been in the areas of economic development, unique partnerships, fundraising for programs, championing density, etc.
- **Economic Drivers and Community Builders:** Some BIAs are able to see the greater importance of their advocacy, marketing, and facilitator components to create greater economic development and community building within their BIAs and in their areas of influence surrounding the BIA. However, it is understood that not all BIAs want to actively engage in economic development.

- **Priorities of a BIA:** As stated, 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 overarching element over all activities and programs carried out by BIAs.
- **Partnerships and Communication Matters:** 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, it was concluded that 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.

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 is 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 success benchmarks (indicators) against which future trending can be compared to determine their efficiency and 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.

Consultation primarily is focused on the engagement of key stakeholders, the BIA membership, municipal and provincial officials, businesses, and the public to obtaining 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 were to be engaged, and to ensure that there were a variety of opportunities to participate throughout the project.

The Consultation approach through each phase is 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 a webinar, social media campaign, 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 executive 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 Executive – 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 report includes summary sections of the consultation process. This is found in sections 1.0 to 6.0. Sections 7.0 to 11.0 include detailed findings from the online survey as well as the interviews undertaken in Phase 1 of the research.

The overall Consultation approach focused on five key points:

- Consideration for the different types of BIAs (i.e. small versus large).
- Methodologies that are engaging but easy to comprehend and respond to.
- Simplicity and clarity with both language and terminology.
- Social media e-blasts that are engaging and informative (through Brand Clarity).
- Phased approach to allow for different types of stakeholders to participate and methodologies to be used.

In the end, the Consultation approach had to produce the following deliverables:

- Engage key stakeholders, the BIA membership, municipal and provincial officials.
- Ensure that varying geographical and regional contexts are represented.
- Ensure that there are a variety of opportunities to participate.
- Identify a common set of indicators for BIAs across the province.
- Create a useable “Indicator List” that facilitates benchmarking success for each different BIA in a customized manner.

To achieve the overall goals, the process included:

- Key stakeholder interviews.
- Online survey of BIAs and government agencies.
- Two webinars to relay information and gather feedback including post webinar online surveys.

- Online survey for the Weekly Question of the Week (Wednesday) whereby each week was devoted to one specific data gap in the indicator research.
- Follow up online surveys with participants to assist in clarifying direction for the indicators and data gap issues.
- Six Advisory Committee meetings (coordinated and led by Fotenn).
- Bi-weekly Team conference calls.
- Final presentation of results at the annual OBIAA conference in 2017.

As stated, from June 2016 to March 2017, the team engaged in an extensive process related to:

- Brainstorming potential indicators related to identified goals.
- Refining the indicators based on prioritization of audience members, BIA story, and data availability.
- Assessed methods for obtaining data related to the agreed upon indicators from BIAs and BIA members.

4.1 KEY STAKEHOLDER INTERVIEWS

KEY STAKEHOLDER INTERVIEW RESPONSE PROFILE	TOTAL NUMBER OF INTERVIEWS
Total Number of Interviews	37
RESPONDENT AFFILIATION WITH BIAs	
BIAs	26
Government	11
LOCATION OF BIA	
Greater Golden Horseshoe and Central Ontario	15
Eastern Ontario	10
South Western Ontario	2
Northern Ontario	3

4.2 ONLINE SURVEY - PHASE I

Goals

- Allow for increased participation of BIAs and other organization towards developing a set of indicators.
- Encourage BIA participation in the process and gauge interest in the topic of Return on Investment Indicators.
- Allow for multiple avenues within the survey to discuss the importance of BIAs in their Municipalities/Region, audience prioritization, partnership effectiveness, goal alignment with future BIA success, and potential indicators.

Methodology

- Questions were developed using SurveyMonkey® software.
- Link to survey sent to OBIAA database and Economic Development Council of Ontario database through an email blast.

- Additional reminders to complete the survey were sent through Twitter and Facebook.
- Questions were designed to be primarily closed ended to allow for easy answering through tick box.
- The survey program allowed respondents to start the survey and then to return to the survey at their leisure to complete more complicated questions.
- Segmentation type questions were introduced to allow for the data to illustrate both similarities and differences between the different BIAs structure (i.e. size of BIA, size of budget, partnership status, etc.) as well as BIA representatives and Municipal and other government type staff or council members.
- Four email blasts were used at the beginning, first week, mid-point, and one day before closing the survey.

- The online survey included four major sections:
 1. Identification of key attributes of the BIA including geographic location, community population, business mix, number of members, BIA budget – levy and other money raised, and presence of a strategic plan and goal achievement rate.
 2. Communication of BIA success to different audience members.
 3. Amount and effectiveness of partnerships with the BIA from a wide range of groups including Municipality, residents, schools, tourism, fire and safety, etc. and the importance of each of the potential partner audience groups for the BIA.
 4. Indicators – three methods were used to ascertain indicators to allow for multiple methods for BIAs to discuss their importance.
 - a. Success stories and challenges – allow respondents to discuss key achievements and reasons for success as well as the challenges they face.
 - b. Goal categories – allow respondents to rank the importance of each goal to achieve success and their need for information around those goals to communicate success.
 - c. Indicators – allow respondents to state specific indicators that use or would like to use to communicate the successes and benefits of their BIA.

Results

- 160 total online survey responses.
- 82 out of 160 respondents completed the entire survey (answered ALL questions).

ONLINE SURVEY RESPONSE PROFILE	% OF RESPONDENTS ANSWERING QUESTIONS
BIA RELATED	
BIA Executive Director, Assistance, Director, General Manager	54%
BIA Chairperson, Board Member	17%
Other BIA staff	8%
GOVERNMENT RELATED	
Municipal staff member of some kind	19%
Member of Council	3%
Provincial or Federal Government staff	2%
LOCATION OF BIA	
Greater Golden Horseshoe and Central Ontario	55%
Eastern Ontario	20%
South Western Ontario	13%
Northern Ontario	6%
Other Areas of Central Ontario	3%
Refused	3%
SIZE OF COMMUNITY WHERE BIA IS LOCATED	
< 25,000 residents	33%
25,000 to 49,999	13%
50,000 to 99,999	13%
100,000 to 199,999	13%
200,000 to 499,999	4%
500,000 +	24%
BIA MEMBER SIZE	
< 50 members	1%
50 to 99	7%
100 to 199	36%
200 to 499	41%
500 +	15%

4.3 WEBINAR WORKSHOP #1

Goals

- Intent was to make this element of the consultative process less like a typical Question and Answer webinar and more strategic in nature where the participants have completed homework in advance utilizing the Draft Background Research Report and the Indicator List Summary in a structured worksheet so that the discussion would be very focused.
- The unknown factor was the level of participation so the Team designed a number of approaches to complete this phase based on the potential number of BIAs and other stakeholders that may participate.

Methodology

- Based on the number of participants, two webinars (morning and afternoon) were provided to give participants an opportunity to attend.
- Registrants were encouraged to bring other members to the webinar.
- Pre-registration via a link was provided on an email blast.
- Once registered participants were sent a summary package to review prior to the session that would include: Background Research Report, Initial Indicators Summary and List and Evaluation Matrix.
- After the webinar, all participants received the presentation.
- During the presentation and discussion members were polled on topics that came to light including the inclusion of the descriptor “Prosperous” in the BIA story.

- Each participant was allowed to contribute to the dialogue and discussion through chat rooms and questions/answer components of the Paradigm website webinar features.
- A follow up online survey was sent to webinar participants to query further topics on missing indicators and to provide initial rankings.

Results

Number of Participants

- 25 participants in morning session.
- 14 participants in afternoon session.

Webinar 1 - Online Poll Question #1:

Do you think the word “prosperous” should be added to the ROI mission statement/story?

	WEBINAR #1 MORNING	WEBINAR #1 AFTERNOON	TOTAL
Yes	25	12	37
No	0	2	2

Feedback

- General feedback from participants was positive.
- The initial five goals developed by the Team and Advisory Committee were consolidated into four main ones – street appeal, community engagement, supporting local businesses including marketing, and economic development.
- An online survey was sent to participating BIAs to provide further input into the potential indicators.

- Questions, answers, and the survey responses were incorporated into the indicator lists and included:
 - Focus on business longevity instead of just new business openings.
 - Assess the importance of BIAs from a social and economic point of view on surrounding areas and neighbourhoods in terms of increased housing prices or lower vacancy and how people want to choose a residence that is close to a well-functioning main street area.
 - Communicating with government health officials related to safety and location of methadone clinics.
- The ratings would be based on three over-arching criteria that included participants to rank the importance on a scale of zero to three:
 - Audience: BIA members, Municipality, Other Government, Public.
 - BIA Story: Vibrant, Resilient, Distinct, Livable (and potentially Prosperous).
 - Data Availability: Degree to which members believed data was readily available.
- The rankings were carried out by Team first to consolidate the list and then second by the Advisory Committee.
- During the Advisory Committee meeting, members had to provide rationale for their ranking decisions during the final tally.
- Only indicators that scored above the threshold were considered (minimum 12 out of 16).
- Agreed that a Confidence Scale would be required to help BIAs ascertain how robust the data findings are for the reader.
- Confidence scale included:
 - Regional representation.
 - Source of data.
 - Geographic representation.
 - BIA response rate.

Outcomes

- At the conclusion of the first webinar, the Team was in a position to move forward with prioritizing and weighting the potential indicators based on the following:
 - A consolidation of the five goals to four whereby marketing was included in the goal Supporting Local Businesses.
 - The other goals remained Economic Development, Street Appeal, and Community Engagement.
 - The aim was not to benchmark the indicators at this time but to assist BIAs to measure their status internally.
 - The review of indicators must include proving why the indicator was important and relevant.
 - The discussion required further alignment of each indicator with a time frame required (e.g., one year, five years) and its comparability (e.g., total employment, employment per square meter, employment change over time, etc.).

4.4 KEY STAKEHOLDER INTERVIEWS

Goals

- Collect data for the data gap analysis from BIAs and businesses in the BIAs.
- Create an ongoing and standardized approach for BIAs to share simple information with OBIAA.
- Create an ongoing and standardized approach for BIAs to encourage their members to share information with a sanctioned third party.

Methodology

- To complement the data gathering work being coordinated by Cobalt Connects, 360 Collective consulted with BIAs and BIA members to gather data for select indicators.
- Goal was to create an ongoing and standardized way for BIA management to share simple information with OBIAA and for BIA management to encourage their members to share information with a sanctioned third party.

- Used an online survey for 7 weekly questions utilizing SurveyMonkey®.
- Each week, questions related to data availability for select indicators were sent to the BIAs with a follow up question that the BIAs would forward to their membership.
- Surveys began Wednesday November 16 2016 and finished Wednesday December 21 2016. Note during the Wednesday December 14 2016, two survey sets of questions were sent out.
- An incentive of one free conference registration (courtesy of OBIAA) to be drawn from the BIAs who answer all 7 questions and one free mini iPad (courtesy of Cobalt Connects) to be drawn from the BIA members who answer all 7 questions was provided.
- Created a customized link that was simply clicked on through via an email blast.
- The questions included:

BIA QUESTIONS		MEMBER QUESTIONS
1.	How many new businesses have opened in your BIA in the past 12 months?	When do you open your business during the week? (Please choose the closest applicable time for your business) When do you close your business during the week? (Please choose the closest applicable time for your business)
2.	How often do you formally review your BIA Strategic Plan? (please choose one option only)	Does your business track any of the following? How do you track these elements?
3.	How much money has your BIA spent on beautification projects in the past 12 months? (i.e. hanging flower baskets, gardens, public art, signage, banners, seating or waste receptacles) What was the largest % of your budget spent on?	Have you invested in street-facing property/business enhancements in the past 12 months? (i.e. facade, lighting, street furniture, window upgrade, signage etc.) If yes, what was the total \$ value of your investment? If yes, what was the total \$ value of any grants/incentives that you received?

4.	How well do you feel your BIA collaborates with your Municipal government on a scale of 1-10, where 1 = very poor and 10 = highly effective? (i.e. Development, Tourism, Planning and/or Police departments etc.) Which Municipal departments and/or Committees do you collaborate with?	In the future, how willing would you be as a member to share the following types of information with your BIA, OBIAA or an authorized data partner, assuming complete confidentiality?
5.	How many event take place in your BIA area annually?	Please let us know your perception of crime in your BIA area on scale of 1-10, where 1 = no crime and 10 = severe crime.
6.	On average, how many vacant commercial spaces (vacant = more than 90 days) are there in your BIA in a given year? Please do not include spaces currently being renovated/restored.	How much \$ have you invested in interior property improvements in the past 5 years? (excluding the purchase of any property)
7.	How many <i>ASSETS</i> are there in your BIA beyond <i>RETAIL</i> , that attract a significant number of visitors to your community? (i.e. arts, culture, parks, places of worship, recreation and/or sports etc.) What are the top 5 assets that attract the most visitors?	What were the top 3 factors that drew you to opening your business in this particular BIA area?

Results

BIA and BIA Member responses for each question for each week are as follows:

	BIA	BIA MEMBERS
Question 1	37	142
Question 2	43	93
Question 3	40	81
Question 4	39	63
Question 5	41	62
Question 6	35	47
Question 7	37	47

During the course of the survey, there were several challenges noted including:

- Timing of the surveys were during the busy holiday period and many BIAs lacked time and resources to complete the surveys.

- The Team had to ensure that if BIAs were to be encouraged to participate they had to see the value to their organization.
- Difficulty in engaging with urban and Greater Toronto Area BIAs.
- Concern over survey and communications fatigue.
- Recognizing the differences in measurement priorities among the wide range of BIAs represented in Ontario especially small BIAs in smaller communities compared to large BIAs.
- Respect for any confidentiality.
- How to develop a consistent and simple input mechanism when in fact each BIA is unique and different.

4.5 WEBINAR WORKSHOP #2 - INDICATORS AND DATA GAPS

Goals

- To update BIAs on the status of the project to date.
- Address four major data gaps in the study including:
 - Gross District Product (GDP).
 - Sales tracking.
 - Quality of Life.
 - Placemaking.
- Indicator ranking of top ten essential indicators for all BIAs.

- After the webinar, all participants received the presentation link for the download.
- During the presentation and discussion members were polled on specific topics .
- Each participant was allowed to contribute to the dialogue and discussion through chat rooms and questions/answer components of the Paradigm website webinar features.
- The Advisory Committee was given the same indicator list as the webinar participants and asked to rank the top ten essential indicators.

Methodology

- Based on the number of participants, two webinars (morning and afternoon) were provided to give participants an opportunity to attend.
- Registrants were encouraged to bring other members to the webinar.
- Pre-registration via a link was provided on an email blast.

Results

Number of Participants

- 12 participants in morning session.
- 17 participants in afternoon session.

Webinar 2 - Poll Question #1:

How would you prefer to receive information and updates about the ROI of BIAs in the future?

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Project portal that is available all year round	2	7	4	13
Project digital newsletter	3	1	4	8
OBIAA website	0	1	1	2
Social media	1	1	0	2
Regular webinars	4	0	1	5
Video message	0	0	0	0
Personal email	3	7	7	17
Other	0	0	0	0
TOTAL	13	17	17	47

Findings

- There is a combination of both “push” and “pull” tactics that BIAs would appreciate to receive or access ROI communications.
- Twenty-seven respondents wanted the information “pushed” towards them from OBIAA via personal email, project newsletter, or social media.
- Twenty respondents wanted to be able to access the information on their terms through a project portal, OBIAA website, or at a webinar.

Webinar 2 - Poll Question #2:

How would you prefer to provide indicator data in future years? (chose one top preference)

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Large yearly online survey	2	6	4	12
Smaller monthly or quarterly surveys	6	7	10	23
Data portal that is available all year	4	2	2	8
Telephone survey	0	1	0	1
Paper survey	0	1	0	1
Other	0	0	1	1
TOTAL	12	17	17	46

Findings

- The majority of respondents want to provide data through smaller monthly or quarterly surveys or annually.
- A small group would be open to providing data into a data portal if available.

Webinar 2 - Poll Question #3:

What do you think is the best way to gather indicator data from your BIA members in future years?

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Large yearly online survey	3	2	1	6
Smaller monthly or quarterly surveys	3	11	5	19
Data portal that is available all year	3	0	4	7

Telephone survey	1	0	0	1
Paper survey	0	0	0	0
Personal visit from a BIA staffer	4	2	6	12
Other	0	0	1	1
TOTAL	14	15	17	46

Findings

- BIAs feel that the best way to engage with their members to collect indicator data would be through a small monthly or quarterly survey.
- However, one-on-one visits was also felt to yield better results including quality of data.

Webinar 2 - Poll Question #4: Gross District Product

Would you use this tool as a metric to benchmark important information about your BIA in the future?

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Yes	13	11	15	39
No	0	3	2	5
TOTAL	13	14	17	44

Findings

- The majority of respondents were supportive of developing a tool that could be used to combine several indicators into one metric that would describe the importance of BIAs.
- Dissent came from those BIAs who worried that comparability from smaller BIAs to major Downtown BIAs would result in proving the opposite effect especially for those with high residential on non-traditional commercial tax bases, or high proportion of services including professional and/or medical (e.g., employment, sales, etc.).
- There is a need for any component of this tool to give clear direction on definitions of inputs, consistency of measurement of those inputs, and how to address outliers.

Webinar 2 - Poll Question #5: Sales Tracking

Please tell us the sales tool you think will be the most successful and consistent across the Province, based on the list below.

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
BIA Loyalty Card program	2	0	1	3
BIA annual membership survey to include sales figures indicated by a range	8	9	8	25
Establish an affinity agreement with Moneris (or others) to capture real sales information	4	0	3	7
Use of Statistics Canada data for gross receipts by census block areas (costly)	0	0	0	0
Establish average benchmark and use of annual survey to BIA members to confirm if above or below the average	4	6	3	13
Representative committee to report on sales for the whole area	1	1	1	3
Other	0	0	1	1
TOTAL	19	16	17	52

Findings

- The majority felt that sales could be tracking through an annual survey to the membership.
- Others felt that a benchmarking survey would yield good results.

Webinar 2 - Poll Question #6: Quality of Life Metrics

If OBIAA were to help create a standardized qualitative measurement tool for BIAs, which would be the most valuable in your practice?

	WEBINAR #2 MORNING	WEBINAR #2 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Online public surveys	4	9	5	18
Event attendance surveys	1	0	2	3
BIA member surveys	3	2	8	13
In-person (intercept) public surveys including focus groups	7	4	2	13
TOTAL	15	15	17	47

Findings

- Online surveys were felt to be the most effective.
- In addition, in-person surveys and focus group setting would be a good method.

Webinar 2 - Poll Question #7: Placemaking Metrics

If OBIAA were to develop standardized tools to gather better event attendance which would be the most valuable to your practice?

	WEBINAR #1 MORNING	WEBINAR #1 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Developing standardized ways volunteers can effectively track attendance	4	0	6	10
Developing a relationship with a service provider that can track attendance	0	1	1	2
Developing a technology-driven solution that can track attendance	11	14	9	34
Other	0	0	1	1
TOTAL	15	16	17	47

Findings

- The majority believe that the best and most effective means of tracking attendance is with a technology-driven solution.
- The use of volunteers and standardized methodologies were highly rated as well.

Webinar 2 - Poll Question #8: Indicator Hierarchy

If you could only know ten things about a BIA, what would they be?

	WEBINAR #1 MORNING	WEBINAR #1 AFTERNOON	ONLINE POLL POST WEBINAR	TOTAL
Business resiliency - turnover, vacancy, longevity	10	14	13	37
Employment statistics	11	8	11	30
Business mix - anchors, critical mass, how aligns with plan	9	11	10	30
Money leverage for streetscape	7	7	12	26
Assessed property values	7	7	11	25
Placemaking - money spent on beautification, number of physical assets	7	6	12	25

Sales - actual numbers	6	11	6	23
Visitor satisfaction	2	11	9	22
Customer draw potential (number of chain and independents)	5	5	12	22
Gross District Product (sales, employment)	10	3	8	21
Actual event attendance	3	7	10	20
New business openings	7	3	9	19
BIA Zone of influence	4	6	7	17
Actual land values, rent values	2	6	7	15
Yearly review of Strategic Plan achievement	5	6	4	15
Number of things to do in BIA/Region	2	3	9	14
Average dwell time	3	3	7	13
Safety	3	2	6	11
Private sector investment	4	4	2	10
Local capacity building	1	3	6	10
Amount of gross leasable area	3	2	4	9
Building permits by category	2	2	3	7

Findings

- Those factors that scored 21 or higher were included in the top ten.
- Business resiliency was the top-rated indicator as a must have to measure success of a BIA.
- The concept of Gross District Product was the tenth most important.
- For the four goals the following indicators were listed in the top ten:
 - **Supporting Local Business**
 - Business resiliency.
 - Business mix.
 - Customer draw potential.
 - **Economic Development**
 - Employment statistics.
 - Assessed property values.
 - Sales – actual numbers.
 - Gross District Product.
 - **Street Appeal**
 - Money leveraged for streetscape.
 - Placemaking.
 - Visitor satisfaction.
 - **Additional Comments from Webinar**
 - Need to consider bilingual communities for their economic contributions.
 - Consider national program and how to easily translate information for bilingual needs.
 - Example provided of how a BIA approach sales tracking through surveys and face-to-face meetings.
 - Need to change NAICS definitions related to definition of a small business, under 100 employees is too large for most BIA businesses.
 - Members identified grants and programs to aid in any translation services required.
 - Media release timing.

The Advisory Committee was comprised of representatives of different BIAs (small, large, different regions, etc.), as well as government agencies. During the course of the study, six (6) Advisory Committee Meetings were held. At each Advisory Committee meeting, notes were taken and next step action items were set.

Three (3) of the meetings were in person and the remaining via telephone/conference line.

June 30 2016 - Advisory Committee #1 - Kick Off (in person)

Goals

- Project introduction.
- Team introduction.
- Exercise on BIA story, goals, and priorities.

Discussion

- Reviewed each member's goals and thoughts for the end process.
- BIA goals and priorities .

Results/Action

- Develop a concise story for BIA for ROI.
- Develop over-arching goals to guide BIA indicators.

August 11 2016 - Advisory Committee #2 - Presenting Background Research

Goals

- Review background research.

Discussion

- Tailor the BIA story.
- Review high level background research including:
 - Literature review/benchmarking.
 - Best practices.
 - Performance indicators.
 - Data sources.
 - Key observations and considerations.

Results/Action

- On-going research, outreach, and data mining.
- Further refinement of BIA audience categories and BIA areas of influence.

September 15 2016 - Advisory Committee #3 - Presenting Indicators and Evaluation Matrix

Goals

- Review first pass of indicators.

Discussion

- Discussed importance, relevance of goals and indicators.
- Offered suggestions on consolidation, weighting, re-alignment.
- Reviewed potential segmentation by audience.

Results/Action

- Team was tasked to consolidate list by weighting indicators by audience, BIA story, and data availability.

September 29 2016 - Advisory Committee #4 - Determining Agreed Indicators (in person)

Goals

- Team to refine indicators based on consolidated list based on audience, BIA Story, and data availability.

Discussion

- Focused on prioritizing and weighting indicators based on street appeal, supporting local businesses, economic development, and community engagement goals.

Results/Action

- Those indicators given a minimum score were highlighted.
- Re-alignment and agreement on top indicators.
- Three major tools were developed including Gross District Product, Quality of Life, and Placemaking as key deliverables.

December 1 2016 - Advisory Committee #5 - Review of Data Analysis Findings

Goals

- Fill the data gaps.
- Establish consensus on importance and how to approach filling them.
- Share knowledge of potential sources and tools for future development.

Discussion

- Seven major data gaps included:
 - Actual event attendance.
 - Average dwell time in a BIA.
 - Sales tracking.
 - Conversion rates.
 - Employment tracking.
 - Gross District Product .
 - Quality-of-life metrics.
- Questions included: What data should we be collecting?; What is/are the barrier(s)?; Who holds the information?; Is there a Tool that needs to be developed?; Recommendations for Data Capture in future?; Is this a legitimate DATA GAP? Yes/No.

Results/Action

- Agreement on importance of each data gap and future prospects for determining how this data could be collected.

February 23 2017 - Advisory Committee #6 - Recommendations, Final Report and Communications Plan for Future

To follow

- Advisory Committee #6 is scheduled for February 23, 2017 and outcomes from that meeting will be added at a later date.

Indicator Hierarchy - Advisory Committee

By contrast to the Webinar #2 indicator hierarchy exercise and findings, the indicators were also ranked by the Advisory Committee. Results of the rankings by the Advisory Committee includes:

Advisory Committee #6: Indicator Hierarchy

If you could only know ten things about a BIA, what would they be?

	TOTAL
Sales - actual numbers	18
Gross District Product (sales, employment)	18
Employment statistics	16
Business mix - anchors, critical mass, how aligns with Plan	16
Business resiliency - turnover, vacancy, longevity	15
Safety	15
Amount of gross leasable area	15
Money leverage for streetscape	14
Actual land values, rent values	14
Private sector investment	14
Visitor satisfaction	8
Assessed property values	5
Placemaking - money spent on beautification, number of physical assets	5
Yearly review of Strategic Plan achievement	5
Customer draw potential (number of chain and independents)	4
New business openings	4
Actual event attendance	3
Average dwell time	3
Local capacity building	3
Building permits by category	2
Number of things to do in BIA/Region	1
BIA Zone of influence	0

Findings

- The Advisory Committee ranked hard economic data as the most important and included actual land values and private sector investment in the top ten.
- Customer draw potential, visitor satisfaction, and placemaking were dropped from the top ten.
- Those factors that score 14 or higher were included in the top ten:
 - **Economic Development**
 - Sales – actual numbers.
 - Gross District Product.
 - Employment Statistics.
 - Actual land values.
 - Private sector investment.
 - **Supporting Local Business**
 - Business Mix.
 - Business Resiliency.
 - Amount of gross leasable area.
 - **Street Appeal**
 - Money leveraged for streetscape.
 - **Community Buildings**
 - Safety.

- **Street Appeal**
 - Money leveraged for streetscape.
 - Placemaking.

Summary: Combined Indicator Hierarchy

If you could only know ten things about a BIA, what would they be?

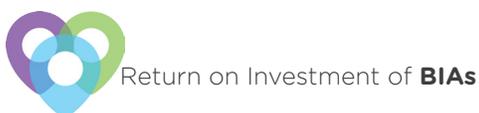
	TOTAL COMBINED RANKING
Business resiliency - turnover, vacancy, longevity	37
Employment statistics	30
Business mix - anchors, critical mass, how aligns with plan	30
Sales - actual numbers	23
Money leverage for streetscape	26
Gross District Product (sales, employment)	21
Assessed property values	25
Placemaking - money spent on beautification, number of physical assets	25
Visitor satisfaction	22
Actual land values, rent values	15
Customer draw potential (number of chain and independents)	22
Safety	11
Private sector investment	10
Amount of gross leasable area	9
Actual event attendance	20
New business openings	19
Yearly review of Strategic Plan achievement	15
BIA Zone of influence	17
Average dwell time	13
Number of things to do in BIA/Region	14
Local capacity building	10
Building permits by category	7

Summary: Combined Indicator Hierarchy - Webinar Participants and Advisory Committee

The combined webinar participants and Advisory Committee rankings produced the following chart.

- Top ten rankings include:
 - **Supporting Local Business**
 - Business resiliency.
 - Business mix.
 - Visitor satisfaction.
 - **Economic Development**
 - Employment statistics.
 - Sales – actual numbers.
 - Gross District Product.
 - Assessed property values.
 - Actual land values, rent values.

Bi-weekly meetings with the Team were held primarily on Mondays to review process, methodology, data gaps, progress, and next steps. This included OBIAA, TABIA, Fotenn, Cobalt Connects, Brand Clarity, and 360 Collective.



Based on the online survey, the consultation research further defined the responding BIAs in terms of total operating budget, the membership business mix composition, and the presence of a strategic plan (including plan achievement levels).

BIA Operating Budget

The BIAs’ budget is primarily composed of money from the property tax levy and other sources such as public and private sector grants, sponsorships, etc. This analysis excludes in-kind work.

TOTAL BIA OPERATING BUDGET - PROPERTY TAX LEVY AND OTHER SOURCES	PROPERTY TAX LEVY	OTHER SOURCES OF REVENUE
\$0	0%	8%
\$1 - \$9,999	2%	26%
\$10,000 - \$24,999	1%	14%
\$25,000 - \$49,999	7%	7%
\$50,000 - \$99,999	24%	6%
\$100,000 - \$199,999	22%	8%
\$200,000 - \$499,999	23%	2%
\$500,000 - \$999,999	6%	0%
\$1,000,000 or more	8%	0%
Don't Know, Refused	2%	6%

Findings

- 24% of BIAs have a property tax levy of \$50,000 to \$99,999. The average property tax levy is \$259,400.
- 26% of BIAs are able to raise additional funds of \$1 to \$9,999. The average revenue raised from other sources is \$25,055.

Membership Mix and Vacancy

The ranking of business mix/vacancy averages (average percentage of total businesses in the BIA) across all responding BIAs is as follows:

RANK	MEMBER BUSINESS CATEGORY (NAICS)	AVERAGE NUMBER OF BUSINESSES
1	Restaurant and Food Service	22%
2	Traditional Retail	22%
3	Personal Services	15%
4	Business Services	11%
5	Finance and Insurance	11%
6	Health Services	9%
7	Grocery and Drug Store	6%
8	Vacant	6%
9	Recreation	4%
10	Arts, Culture, and Entertainment	4%
11	Light Manufacturing	5%
12	Automotive	4%

Findings

- The top two categories of types of members include restaurants/food services and traditional retail. On average, each category accounts for 22% of the total number of businesses in all BIAs reporting.
- Average vacancy is 6% across all BIAs reporting.

BIA Operating Budget

A key question for BIAs moving forward is whether they have developed a realistic and attainable strategic plan that lays out as specific as possible who is responsible and the time frame allocated. How often that plan is updated is important as well.

STRATEGIC PLANNING AND GOAL ACHIEVEMENT	% OF BIAS RESPONDING TO THE QUESTION
BIA Has a Strategic Plan	63%
STRATEGIC PLAN UPDATE FREQUENCY	
Yearly	20%
Every 2 Years	4%
Every 3 Years	10%
Every 4 Years	19%
Every 5 Years	19%
Never	14%
Don't Know	14%
STRATEGIC PLAN GOAL ACHIEVEMENT	
All of the Goals	8%
Most of the Goals	42%
Some of the Goals	34%
None of the Goals	0%
Don't Know	16%

Findings

- Almost two-thirds of BIAs have a strategic plan.
- Most BIAs update their strategic plan every four or five years.
- Half of the BIAs completed most of all of their goals within their timeframe.

Benchmarking and Competitive Positioning

What are the subset of other main streets, downtowns, commercial districts that may or not be BIAs that the BIA views as complementary and competitive with is a key learning insight? Whether they are primarily local or global is not necessarily a function of size. This is a key positioning point for BIAs to understand where they fall upon in the spectrum of local to destination.

BENCHMARKING AND COMPETITIVE POSITIONING	% OF BIAS RESPONDING TO THE QUESTION
Other Local BIAs and Business Districts Nearby	20%
Other BIAs and Business District in the Municipality	4%
Other BIAs and Business Districts in the Region	10%
Other BIAs and Business Districts in Ontario	19%
Other BIAs and Business Districts in Canada	19%
Other BIAs and Business Districts Internationally	14%
Don't Know	14%

Findings

- The majority of BIAs are competitively positioned for their local area.
- A large proportion, 41%, are also positioned to compete across Ontario.
- A smaller percentage are nationally or internationally competitive.

Visitor Groups

Similar to benchmarking and competitive set, the appeal of BIAs to different target markets related to their proposed future potential success. The spectrum of their appeal to a range of target markets is an essential element of their competitive positioning. This includes:

VISITOR GROUPS	SOMEWHAT IMPORTANT	CRITICALLY IMPORTANT
Local	21%	74%
Municipal	36%	49%
Regional	39%	25%

Provincial	22%	5%
National	9%	3%
International	11%	2%

Findings

- Almost all BIAs are heavily reliant on a local consumer target market base that can easily access the BIA.
- Over one-quarter of BIAs are somewhat to critically reliant on broad based provincial appeal.

Communicating BIA Success - Audience Importance

The BIAs stated the importance of communicating their success to the following audience groups in terms of importance on a scale of 1 to 5. The ranked audience groups are:

AUDIENCE GROUP	AUDIENCE IMPORTANCE ON SCALE OF 1 TO 5
BIA Membership - Businesses who own their own space and run a business	4.67
BIA Membership - Businesses who rent space in your BIA	4.59
BIA Membership - Property owners	4.03
Economic Development staff or other staff directly involved in BIA issues	3.96
Other Municipal (and regional) government staff and council	3.79
Stakeholders including local Chamber of Commerce, Tourism, Arts and Culture, etc.	3.37
Brokers, leasing agents	3.08
Residents' Associations, neighbourhood groups etc.	3.01
Provincial or Federal government staff and agencies	3.00

Findings

- Members who own their real estate and run a business are considered the most important audience followed by those that rent.
- Property owners are important but often BIAs do not have complete contact lists of property owners and many cite problems with absentee landlords.
- Municipal staff including Economic Development others are moderately important as audience members.
- Local stakeholders – Chamber of Commerce, Tourism, Arts and Culture, Residents' Associations, Neighbourhood Groups – are considered less important.
- Provincial and Federal government staff and agencies are the least important for BIA audience communication.

For further analysis, the Team decided to focus on a few select segmentation markets. These included:

- Number of members: small BIAs with under 200 members compared to larger BIAs with more than 200 members.
- Population size: small communities with under 50,000 people, medium sized communities with 50,000 to 200,000 people, and large communities with over 200,000 people.
- Target market appeal: those BIAs that are primarily local serving compared to those BIAs that also have a wider national/international appeal.
- Business mix strength: those BIAs that have a high proportion of businesses that are traditional retail and those BIAs that have a high proportion of businesses that are food services.

Assessing further the important of communication with various audience groups by BIA segmentation reveals the following:

AUDIENCE GROUP	BIA RELATED	# OF MEMBERS		POPULATION SIZE			TARGET MARKET APPEAL		BUSINESS MIX STRENGTH	
		< 200	200 +	< 50,000	50,000 - 200,000	200,000 +	LOCAL/ REGIONAL	PROVINCIAL, NATIONAL, INTERNATIONAL	RETAIL MERCHANDISE 20% +	FOOD SERVICE 20% +
BIA Membership - Businesses who own their own space and run a business	4.67	4.71	4.63	4.64	4.55	4.94	4.75	4.71	4.80	4.71
BIA Membership - Businesses who rent space in your BIA	4.59	4.55	4.60	4.45	4.65	4.89	4.63	4.68	4.60	4.59
BIA Membership - Property owners	4.03	3.97	4.07	3.84	4.10	4.33	4.09	4.13	4.03	3.91
Economic Development staff or other staff directly involved in BIA issues	3.96	3.81	4.05	3.88	3.90	4.11	4.02	4.03	4.07	4.03
Other Municipal (and regional) government staff and council	3.79	3.65	3.91	3.82	3.45	4.06	3.86	3.81	4.00	3.82
Stakeholders including local Chamber of Commerce, Tourism, Arts and Culture, etc.	3.37	3.55	3.23	3.39	3.25	3.56	3.37	3.61	3.60	3.53
Brokers, leasing agents	3.08	3.13	3.05	3.06	3.10	3.22	3.05	3.19	2.97	3.15
Residents' Associations, neighbourhood groups etc.	3.01	2.97	3.09	2.88	3.20	3.33	3.10	3.13	3.17	3.09
Provincial or Federal government staff and agencies	3.00	2.97	3.00	3.09	2.65	3.17	2.97	3.16	3.33	3.18

Audience Importance - Cross Reference by BIA Type

Findings

- Business owners who own and operate their own space are often the best to communicate with as they have a strong vested interest in seeing the BIA succeed from both a property owner and business operations perspective. This is true for smaller BIAs in larger communities.
- Those BIAs with well-defined critical mass in either retail merchandise or food services (greater than 20% of the business mix), they rated the importance of good communication with all audience members as higher than other BIAs. This was especially true for communicating with stakeholders such as the Chamber of Commerce, Tourism as well as a good relationship with Provincial and Federal organizations.
- Those BIAs reliant on good communication with Municipal Economic Development Departments include larger BIAs, medium to large communities, and those with well-defined target markets and business mix plans.
- Those BIAs reliant on good communication with Provincial and Federal government agencies include both very small and very large communities.

Partnership Existence and Effectiveness

Further, BIAs were asked whether they had a relationship with the following audience groups and to state how effective it was.

AUDIENCE/ PARTNERSHIP GROUP	PRESENCE OF EXISTING RELATIONSHIP WITH BIA	EFFECTIVENESS OF RELATIONSHIP (EFFECTIVE OR VERY EFFECTIVE)
Municipal (and regional) council	100%	89%
Municipal (and regional) staff including Economic Development	97%	81%
Advocacy groups such as OBIAA, TABIA, HABIA, International Downtown Association, 8-80 Cities, etc.	88%	69%

Arts, culture, and entertainment businesses and organizations	88%	56%
Tourism organizations	82%	54%
Other business districts in your municipality or region	78%	46%
Other local groups or community centres such as Lions Club, Rotary, houses of worship, community centre, etc.	75%	45%
Charity groups	74%	34%
Public and Farmers' markets	68%	53%
Chambers of Commerce	68%	48%
Libraries	64%	38%
Schools, and other places of education	59%	28%
Provincial government including Ministry of Municipal Affairs and Housing, Ministry of Transportation, Ministry of Tourism, Ministry of Economic Development, OMAFRA, etc.	55%	36%
Sports and Recreation organizations	47%	27%
Local Resident's Associations or Neighbourhood Groups	44%	29%
Other retail such as a mall or shopping plaza developer or management team	32%	19%

Findings

- Almost all BIAs have relationships with Municipal council, Municipal staff including Economic Development, emergency and protective services, and arts, culture and entertainment businesses and organizations. Generally, these relationships are effective for a majority of BIAs.
- A high proportion of BIAs also have relationships with tourism organizations, other nearby businesses districts, local community groups, charity groups, Chambers' of commerce, libraries, and schools. Generally, these are moderately effective. The difference would be generally positive working relationships with public and farmers' markets.

- Just over half of BIAs have a relationship with the provincial government the results of which are moderate effectiveness.
- Interestingly, a lower proportion work with residents' groups and generally that relationship is not as effective as other ones.
- In addition, the relationships with schools and sports and recreation tend to be not as effective as other ones.

Assessing further the relationship of BIAs with various reveals the following:

AUDIENCE GROUP	BIA RELATED	# OF MEMBERS		POPULATION SIZE			TARGET MARKET APPEAL		BUSINESS MIX STRENGTH	
		< 200	200 +	< 50,000	50,000 - 200,000	200,000 +	LOCAL/ REGIONAL	PROVINCIAL, NATIONAL, INTERNATIONAL	RETAIL MERCHANDISE 20% +	FOOD SERVICE 20% +
Municipal (and regional) council	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Municipal (and regional) staff including Economic Development	97.3%	96.7%	96.8%	93.9%	100.0%	100.0%	100.0%	100.0%	96.7%	97.1%
Emergency and protective services such as police and fire	89.2%	100.0%	96.8%	90.9%	85.0%	88.9%	89.8%	93.5%	100.0%	88.2%
Arts, culture, and entertainment businesses and organizations	87.8%	96.7%	90.3%	93.9%	80.0%	88.9%	86.4%	93.5%	96.7%	94.1%
Advocacy groups such as OBIAA, TABIA, HABIA, International Downtown Association, 8-80 Cities, etc.	87.8%	86.7%	83.9%	84.8%	90.0%	88.9%	86.4%	90.3%	86.7%	85.3%
Tourism organizations	82.4%	90.0%	83.9%	90.9%	70.0%	83.3%	79.7%	93.5%	90.0%	85.3%
Other business districts in your municipality or region	78.4%	73.3%	77.4%	66.7%	85.0%	94.4%	84.7%	74.2%	73.3%	79.4%

AUDIENCE GROUP	BIA RELATED	# OF MEMBERS		POPULATION SIZE			TARGET MARKET APPEAL		BUSINESS MIX STRENGTH	
		< 200	200 +	< 50,000	50,000 - 200,000	200,000 +	LOCAL/ REGIONAL	PROVINCIAL, NATIONAL, INTERNATIONAL	RETAIL MERCHANDISE 20% +	FOOD SERVICE 20% +
Other local groups or community centres such as Lions Club, Rotary, houses of worship, community centre, etc.	75.7%	86.7%	87.1%	78.8%	65.0%	83.3%	72.9%	77.4%	86.7%	76.5%
Charity groups	74.3%	76.7%	64.5%	78.8%	75.0%	72.2%	72.9%	87.1%	76.7%	70.6%
Public and Farmers' markets	68.9%	83.3%	74.2%	78.8%	55.0%	66.7%	66.1%	74.2%	83.3%	76.5%
Chambers of Commerce	68.5%	79.3%	61.3%	84.8%	70.0%	41.2%	66.1%	80.6%	79.3%	60.6%
Libraries	64.9%	70.0%	54.8%	72.7%	65.0%	50.0%	64.4%	83.9%	70.0%	64.7%
Schools, and other places of education	59.5%	63.3%	48.4%	51.5%	65.0%	72.2%	57.6%	71.0%	63.3%	58.8%
Provincial government including Ministry of Municipal Affairs and Housing, Ministry of Transportation, Ministry of Tourism, Ministry of Economic Development, OMAFRA, etc.	54.1%	53.3%	48.4%	54.5%	50.0%	55.6%	49.2%	58.1%	53.3%	47.1%
Sports and Recreation organizations	47.3%	46.7%	45.2%	51.5%	45.0%	44.4%	47.5%	54.8%	46.7%	35.3%
Local Resident's Associations or Neighbourhood Groups	44.6%	40.0%	32.3%	21.2%	50.0%	83.3%	47.5%	41.9%	40.0%	50.0%
Other retail such as a mall or shopping plaza developer or management team	31.1%	26.7%	16.1%	21.2%	35.0%	38.9%	32.2%	32.3%	26.7%	26.5%

Findings

- Smaller BIAs (under 200 members) and generally those in smaller communities (under 50,000 people) rely on greater partnerships with other organizations such as Chambers' of Commerce, tourism, charity, community groups, public and farmers' markets, libraries, charities, and schools. These smaller BIAs and those in smaller communities are more dependent on relationships with Provincial government agencies.
- Larger BIAs (over 200 members) and those in large communities tend to be more self-sufficient including higher BIA operating budgets to get the tasks accomplished.
- BIAs in larger communities are reliant on the coordination with other business districts in their area.
- Smaller BIAs with lower budgets are more reliant on working relationships.
- Those BIAs that have a defined critical mass in retail merchandise rely on greater partnerships with other organizations such as Chambers' of Commerce, tourism, community groups, charity, public and farmers' markets, libraries, charities, and schools. They are not as reliant on Provincial government agencies.
- Those BIAs that have a defined critical mass in food services are not any more likely to have exceptionally high relationships with other organizations as any other. However, they do tend to have good relationships with local residents' groups as eating drinking has become increasingly localized within specific business districts.

Measuring Successes and Challenges

- The numbers in the following charts refer to the number of mentions that category received from all online survey respondents. BIA refers to BIA staff, executive directors, Board members, and other members. Government refers to Municipal staff, council, provincial, or federal staff.
- The following charts illustrate the key words that respondents used to describe their successes and challenges of their respective BIAs.

BIA's Achieved Success in the Following Categories/Programs

	BIA	GOVERNMENT
BIA organization, engagement, board, volunteers, communication	102	29
Municipal engagement and partnership	38	7
Community engagement and partnership (residents, Chamber)	28	4
Events	23	4
Marketing programs	19	7
Business mix, strong business owners	14	3
Beautification	11	7
Strategic plan, priorities	10	8
New business development, openings, innovation	9	
Tourism	8	
Location attributes	8	
Customer, visitation, pedestrians on the street	7	2
Fiscal management, new revenue sources	5	3
Public, private investment, real estate planning	5	2
Arts and culture	3	
Other target markets (students, workers)	3	
Other programs, diversity of programs	3	1
Number of things to do	2	
Heritage	2	

Planning, zoning, bylaws	2	
Streetscaping	2	
Positive feedback	2	
Overall experience, vibrant	2	2
Passion	1	
Research	1	1
Longevity of BIA	1	
Flexibility	1	1
Overall good economy	1	
Size of the BIA	1	
Advocacy work	1	1
Parking programs	1	
Accessibility	1	
Improved perceptions	1	
Lowered vacancy	1	
Pride of place	1	
Business outcomes for members		2
Education, training		2
Attract increased residential		1

Top Rated BIA Successes

	BIA	GOVERNMENT
BIA member engagement	9	3
Events	8	1
Fiscal management, new revenue sources	6	2
BIA board of directors	6	
BIA member communication	5	
Beautification, capital invested	4	1
Municipal engagement and partnership	4	3
Community engagement	3	2
Volunteers	3	
Strategic plan, priorities	3	2
Business mix, diversity of things to do	2	

Marketing	2	
Positive feedback	2	
Advocacy	2	
Streetscape	1	
Tourism	1	
Pride of place	1	
BIA staff	1	
Planning, zoning, bylaws	1	
Heritage	1	
Public, private investment, real estate planning	1	
Local residential engagement	1	
Other partnerships	1	
Other target markets	1	
Being a resource centres	1	
Innovative business building ideas	1	
Business outcomes for members		1
Review after each event, program		1

Size of the BIA area and how to serve all members equally	2	
Declining sponsorship money	1	
Pressure to learn BIA roles	1	1
BIA succession planning	1	
Lack of a strategic plan	1	3
BIA does not know residents, lack of community support	1	2
Lack of succession planning		1
BIA boundaries		1
MUNICIPAL		
Municipal relations	16	2
BIA role in municipality	1	2
Declining municipal services in BIA area	1	
INVESTMENT		
Lack of capital budget for required projects	2	
Infrastructure requirements	1	
How to attract good developments	2	
PUBLIC REALM AND FACADES		
Beautification	4	
Garbage, litter	4	
Lack of property standards, facades	3	
Street walkability, streetscape	3	
BUSINESS MIX		
Increased vacancy, vacant buildings	11	1
Absent landlords	5	2
Loss of retail in general or increasing number of services	4	
Competition, big box, other places and business districts	4	4
Encouraging consistent hours of business	4	2
Increased costs, taxes for businesses	3	
Loss of small businesses	2	

BIA Challenges in the Following Categories

	BIA	GOVERNMENT
INTERNAL BIA ORGANIZATION		
BIA member engagement	18	11
BIA budget issues, fiscal issues	17	8
Lack of staff, resources, lack of time	15	4
BIA communication and education with members	8	2
Apathy – in general	5	
Requirement for BIA to keep up to date on planning policies and guidelines	5	1
Lack of new volunteers, volunteer burn out	3	2
Board specific issues	2	1
Lack of vision	2	

Increased rent	2	
Community is not diverse enough (things to do)	2	
Specific issues with one landlord	1	
Business turnover	1	
Business mix	1	
Declining quality of retail	1	
MARKETING		
Online marketing	1	1
Destination marketing	1	
Negative perceptions		1
VISITATION		
Parking, perception, amount, management	6	
Lack of pedestrian traffic, how to increase number of visitors	5	
OTHER		
Adjusting to road related construction	4	
Flood plain restrictions	1	
National economy	2	
Winter, snow removal	1	

- Other key successes are centred around key programming such as events, marketing, beautification, and fostering a business mix and new innovative business openings that support the BIA strategic plan. During the interviews BIAs discussed examples of these programs and pilot type projects in their BIAs that illustrated how they measured their success. It can be argued that events and marketing are related to demand side economic development and beautification and business mix are related to supply side economic development.
- Finally, a key to success is having a Strategic Plan that is realistic, achievable within a four to five-year time frame, and designates responsibility.
- Municipal and other government staff agreed with these BIA successes but placed a slightly higher rating on BIAs that have a good strategic plan.
- Challenges for BIAs are focused on similar issues of BIA member and property owner engagement and Municipal engagement. Second, issues related to finances and lack of resources are always present. Third, issues about economic development supply and demand and supporting local businesses such as vacancy and lack of pedestrian traffic are top of mind as well as business hours and increased cost for doing business.

Findings

- Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. Developing programs need to have the support on membership. This includes factors such as leadership, staffing, active board members, communication, and active volunteers.
- The top three successes are related to relationship building, capacity building, and social capital investment. Using the saying “through many hands comes light work” the BIA is able to leverage good working relationships to the benefit of the members. As stated, this is key for smaller BIAs and BIAs located in smaller communities.

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.

The main goals were reduced to four including:

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

Within these four goals there were several sub-categories including:

- **Street Appeal**
 - Physical Conditions of the Street and Buildings.
 - Visitor Experience.
- **Economic Development**
- **Support Local Business**
 - Business Impact.
 - Movement within a BIA.
 - Marketing.
- **Community Building**
 - Internal Community Building.
 - External Community Building.

	CURRENTLY MEASURE	BIAS THAT HAVE EXTENSIVE AND VERY EXTENSIVE CURRENT DATA COLLECTION	HOW CRITICALLY IMPORTANT IS IT TO TRACK FOR FUTURE SUCCESS
Economic Development	58%	36%	63%
Support Local Business - Marketing	82%	37%	56%
Support Local Business - Business Impact	51%	22%	53%
Street Appeal - Visitor Experience	38%	19%	52%
Street Appeal - Physical Conditions of Street and Buildings	59%	38%	50%

Support Local Business - Movement within a BIA	40%	26%	38%
Community Building	41%	24%	38%
Support Local Business - Visitation	42%	13%	36%

Findings

- Support Local Business - Marketing is the main measurement assessment used by most BIAs (82%).
- All other types of measurement assessments are split in terms of being used or not.
- Many BIAs measure:
 - Street Appeal - Physical Conditions of Streets and Buildings (59%).
 - Economic Development (58%).
 - Support Local Business - Business Impact (51%).
- Fewer BIAs measure:
 - Support Local Business - Visitation (42%).
 - Community Building (41%).
 - Support Local Business - Movement within a BIA (40%).
 - Street Appeal - Visitor Experience (38%).
- The most amount of data the BIAs have is linked to Street Appeal – Physical Conditions of Streets and Buildings, Support Local Business – Marketing, and Economic Development with very limited or limited data being collected in other categories.
- In the future, the BIAs feel that these are the top five categories that are critically important to measure in order of importance:
 1. Economic Development.
 2. Support Local Business - Marketing.
 3. Support Local Business - Business Impact.
 4. Street Appeal - Visitor Experience.
 5. Street Appeal - Physical Conditions of Streets and Buildings.

The top four goals through the market research conducted to date are:

1. **Street Appeal** – Physical conditions of street and building and visitor experience
2. **Economic Development**
3. **Support Local Business** – Business impact, visitation, movement within the BIA, and marketing
4. **Community Building**

As the consultation process moved forward, these goals and their corresponding indicators were consistently assessed in relation to the agreed upon statement:

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

Note that several indicators are listed under several different goals. During the course of the research it was discussed how many indicators can serve multiple goals and purposes re-enforcing one another.

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.

At present, there is still discussion as per the correct denominator for each indicator, the time frame, the comparability and benchmarking that would be most appropriate for the range of issues that BIAs need to report on.

The following section highlights the extensive list of indicators developed throughout the entire process. This was the starting point of work within the Team, the Advisory Committee, and participants in the webinars and surveys to assist in refining, prioritizing, and weighting the final set of indicators. As stated, this process was based on constantly assessing them against the prospective audience, the BIA story, and data availability.

Note that the final list of top indicators is found in the main report.

10.1 STREET APPEAL

Physical Conditions, Beautification, Building Facades Related Indicators

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 facade 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 worth 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.

Visitor Experience Indicators

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.

GOAL - ASPECT & INDICATOR
STREET APPEAL - PHYSICAL CONDITIONS, BEAUTIFICATION, BUILDING FACADE
PUBLIC REALM, FACADES
Amount of money spent on beautification each year
Amount of money leveraged for streetscape, facade, CIP from different sources - including levy, municipality, grants, sponsorships, etc. (e.g., \$1 of levy was leveraged to produce \$3 of total streetscape improvements)
MOU in place
Number of benches, garbage cans, flowers, banners, etc.
Placemaking metrics (exact metrics to be determined)
PROJECT SPECIFIC
Post mortem conducted after each project completed, including pilot projects
Public realm completion rate
Number of public realm projects each year
STREET APPEAL - VISITOR EXPERIENCE
EVENTS
Actual event attendance
Number of unique visitors (e.g., a visitor who visits event 2 or more times is only counted once)
% of total trade area population that attended event
Business surveys post event - to measure the level of engagement of business
Financial review - budget, revenue sources, in-kind, total expenses, cost savings achieved
Conversion rate of event attendee becoming a repeat visitor to the BIA
Average distance traveled
Number of (or %) visitors from 40 km away or 100 km away (surveys, tickets, license plates, etc.)
OTHER
Average dwell time in BIA
Quality of Life metrics (to be determined)

10.2 ECONOMIC DEVELOPMENT

As noted, economic development indicators were not 100% agreed upon. Interviewees noted the need for evidence based decision making, hard facts, and the need to report on outcomes instead of outputs.

One of the most controversial topics was employment. From a government perspective, increasing employments 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.

The 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 (that the Municipality is not as good at delivering).

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

GOAL - ASPECT & INDICATOR
ECONOMIC DEVELOPMENT
EMPLOYMENT
Employment statistics – actual number, rate of growth/change, measured against --Gross Leasable Area in BIA, compared to rest of municipality
INVESTMENT OR NET NEW INVESTMENT
Building permit \$ amount by categories (residential, commercial, industrial, signage, etc)
New business openings
Private Sector Investment (\$)
Additional leveraged investment through grants, incentives, waiving fees, etc.
Tax Mill Rate comparison
ECONOMIC IMPACT STUDIES
Economic impact assessment – conducted by polls, survey, stakeholder panel, research to show increased productivity of BIA

GOAL - ASPECT & INDICATOR
ECONOMIC DEVELOPMENT
ECONOMIC IMPACT STUDIES
Pedestrian traffic changes directly attributable to new development
VALUE
Assessed property value
Actual land values, rents
BUSINESS MIX
Anchors (individual business or cluster of businesses that create critical mass)
Business mix in relation to strategic plan
IMPACT ON LOCAL AREA
Assessed value of (residential) area surrounding the BIA (as determined by the area of influence)
Local trade area demographics – note changes in population
ZONING, REGULATIONS
Able to achieve residential and employment density targets set by municipality and province
Amount of time for development to be approved (aim for less red tape)
Amount of incentives - \$ incentives (actual and waived fees) to total development

10.3 SUPPORT LOCAL BUSINESS

Support Local Business - 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.

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 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 symbolically important.

In addition, why hard statistics are essential, the story telling of new businesses opening, or success factors for a long-established business, or a pilot project were important.

Support Local Business – 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 36% felt it was critically important to the future success of the BIA.

Apart from surveys, the BIAs were unable to find data related to:

1. Where people came from.
2. Why did they come.
3. What did they do.

Some BIAs felt that they had little control over who comes in to the BIA and that they were more focused on those that 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 shoulder season.

Often BIAs will look to proxy data and observational data as 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 local trade area, 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.

Support Local Business - 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.

Support Local Business - Marketing

Marketing related indicators were the most gathered metrics by BIAs.

82% of the BIAs had metrics related marketing. But only 38% is extensive or very extensive. But 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 such as one BIA that targeted Asian Canadians and noticed there were more Asian Canadians on the street compared to last year.

The list of indicators is not extensive. BIAs used the term metrics generally but there are many more indicators associated within the marketing industry such as page views, bounce rates, etc.

More "complex" BIAs have taken a stronger marketing approach and through technology assisted programs (e.g., Wi-Fi, direct marketing, push ads) have been able to directly monitor the success of marketing programs. This has become a cornerstone of the BIA strategic plan. The data can also be utilized in economic development facilitation work (private and public sector) as well as advocacy work.

GOAL - ASPECT & INDICATOR
SUPPORT LOCAL BUSINESS - BUSINESS IMPACT
BUSINESS SALES
Sales – available by anecdotal research, actual accurate reporting, or panel BIA members report on number or growth movement
PROPERTY OWNERSHIP
Properties owned by local property owners (% of total, % of total GLA)
BUSINESS OPERATIONS - RETENTION
Rent in relation to pedestrian traffic
Business expenses (energy, charges, etc.)
Business confidence survey
Business hours (consistent, late evening, etc.)
Visitor Satisfaction survey
BUSINESS MIX
Amount of gross leasable area
Business turnover
Vacancy (separate structural vacancy issues vs. those vacancies that can be impacted by BIA)
Number of small independent businesses
Number of chains, nationals
TESTIMONIALS
Stories of individual success – testimonials
SUPPORT LOCAL BUSINESS - VISITATION
CUSTOMER ORIGIN
Visitor intercept surveys – number of visitors, local, regional national, International
What motivated them to visit
Demographic of visitors
Overnight stays versus day trippers
Number of things to do in the BIA/region
PARKING
Parking utilization (% or # of spaces or perception of usage)
Parking meter revenue per stall
ACCESSIBILITY
Ease of access for those with a Handicap / Disability

SUPPORT LOCAL BUSINESS - MOVEMENT WITHIN A BIA
Pedestrian counts
Use of technology such as WIFI to track cross shopping and length of stay
SUPPORT LOCAL BUSINESS - MARKETING
MARKETING BUDGET
Marketing budget on each marketing mediums (amount of levy, in-kind, sponsorships, etc.)
SOCIAL MEDIA METRICS
Facebook followers
Likes, clicks, shares, comments
Website traffic
Email reach and open rate
Testimonials, reviews of visitors
MARKETING RECALL AND INFLUENCERS
Propensity of visitor to return to BIA
Visitor recall of BIA marketing

10.4 COMMUNITY BUILDING

There is 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.

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.

GOAL - ASPECT & INDICATOR
CAPACITY BUILDING - INTERNET BIA
MEMBER ENGAGEMENT - MEETINGS
Number of meetings, breakfasts, open houses, etc
Number of members attend AGM
Number of members applying to be on board – applicants to positions ratio
Member satisfaction survey
Newsletter open rate, click rate, page views
Number of members that attend BIA events
Number of positive comments received from members to BIA office
Number of property owner meetings
STRATEGIC PLAN AND BUDGETING
Yearly review of strategic plan achievements – why or why not achieved each action item
BIA budget versus actuals comparison
STAFFING
Number of staff
BOARD
Board turnover rate
VOLUNTEERS
Amount of volunteer hours
COMMUNITY BUILDING - EXTERNAL
MUNICIPALITY
Amount of collaboration with municipality
Number of departments at municipality that BIA works collaboratively on
ADVOCACY
BIA issues presented to Council, BIA submissions made to Council
Member survey Perception of representation
MEDIA
Number of positive and negative articles written about BIA or members

COMMUNITY
Engagement with local neighbourhood
Number of committees and organizations that BIA sits on and vice versa
Number of organizations that want to hold events in your BIA (without BIA support)
Number of positive comments received from outside BIA membership
SAFETY
Crime statistics
Perception of crime in the area

The following are interesting excerpts or paraphrases from the interviews conducted with BIAs and Economic Development professionals and should be considered and incorporated into the final report findings.

- » BIA is about relationship building, capacity building, to create an environment for business to flourish, to direct people to the right resources.
- » BIA cannot do everything well – need focus and specialization.
- » Grant projects are often set to the topic of the day such as employment growth. These may not always match BIA or Municipal objectives.
- » Find that single metric focused on person/ visitor so that BIA can have a direct relationship.
- » Match goals with Municipal Economic Development goals – stem leakage, create inflow.
- » Large BIAs can pay for own economic impact study, small ones cannot.
- » Investing in economic impact study was used to gain member buy-in, show how productive BIA was, and as a recruitment tool.
- » Unrealistic to evaluate every project/event with limited staff.
- » Measurements are circular and re-enforcing on one another
- » Do a strategic business plan every four years, then repeat. Gives enough time to carry out plan with board members.
- » Cannot have too long action plan list – will never get accomplished.
- » BIAs need to determine what projects they will drop before taking on new ones. Have to have the ability to drop what is not working and move on.
- » Need a measurement tool that assesses the partnership effectiveness of BIAs and Municipality.
- » Relationships are more important than statistics.
- » BIAs need to lead from behind.
- » Have to give the BIA members what they want before you can give them what they need.
- » Cannot be about ego, need succession planning where there is a written down memory of projects, what worked, what didn't, etc.
- » BIA should be able to show value and relevance for each line item of their budget.
- » We have to spend smarter.
- » BIA is more community building and less economic development – however they are inter-related.
- » BIA is about improving business opportunities and chances to succeed through removing obstacles/ barriers, beautification, and animating the space.
- » Risk is that under-deployment of resources will result in failure. Or trying to do too much at one time will lead to nothing getting accomplished
- » Strategic plan needs a defined set goals that can be achievable but also needs inherent flexibility to allow new ideas to grow.
- » Indicators will help drive decision making for BIAs and governments to spend money wisely and use money judiciously on things that will make a positive impact.
- » Use indicators such as pedestrian counts so that the BIA can advise governments and developers on where to locate their development so that it will shift pedestrian flow favourably for the whole BIA.
- » Sharing data is essential. Has to be reciprocal between BIA and Municipality.

- » Use gut feeling versus hard data requirements.
- » Moving towards more evidence based decision making.
- » Need to develop creative indicators as proxies for measurement tools.
- » Staff is critical to success of a BIA.
- » Role of BIA is to support businesses to do a better job.
- » Trust, partnerships, relationship, collaboration.
- » BIA consistency shown to get things done time and time again.
- » Measure results not outputs. But need proxies for results.
- » Success stories are needed to match the hard number – need a method to collect stories of how success was put in place.
- » More emphasis on small business development – local, small, arts spaces, innovation hubs.
- » Relationship of the BIA to developing referrals and testimonials from others including local residents as key ambassadors and advocates for the BIA.
- » The power of the BIA is to create collaborative multiplier effects on the local economy. One dollar of BIA levy invested in streetscape actually equals \$3 in total investment through Municipality, grants, sponsorships, etc. or power of one more resident living in BIA positively impacts BIA sales growth opportunities.

Key learnings include:

-  **Engagement:** While BIAs stated that achieving member engagement as one of the top successes they had achieved, the Team also encountered a consultation process that required innovative engagement skills to encourage participation. Divergence on the approach and up take on engagement with both BIAs and their membership was evident throughout the project. As a result, representation across the province varied substantially. 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.
-  **BIA Relevance:** Rather than being only a typical self-affirming study on the importance of BIAs, the study process challenged itself to constantly prove why each indicator was relevant, important, and necessary to telling the BIA success story. This story must be shared at all levels of government and between BIAs and their membership.
-  **Uniqueness:** Each BIA should be recognized as unique and should not be forced into one-size-fits-all approach. The indicators 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.
-  **Governance Model:** BIA governance model is being tested and pushed into different directions that challenge the traditional norms of BIAs only working on beautification and marketing. The stories during the interview process revealed and highlighted a vast array of unique successes that BIAs have achieved through pushing the limits of what the governance model allows. This has been in the areas of economic development, unique partnerships, fundraising for programs, championing density, etc.
-  **Economic Drivers and Community Builders:** Some BIAs are able to see the greater importance of their advocacy, marketing, and facilitator components to create greater economic development and community building within their BIAs and in their areas of influence surrounding the BIA. However, it is understood that not all BIAs want to actively engage in economic development.
-  **Priorities of a BIA:** As stated, 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 overarching element over all activities and programs carried out by BIAs.
-  **Partnerships and Communication Matters:** 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, it was concluded that 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.