



# BC TRANSIT

## Victoria Regional Rapid Transit Survey

### Final Report

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**A report prepared by:  
R.A. MALATEST & ASSOCIATES LTD.**

**For:  
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This report was prepared and/or guided by the following project team members:

**From R.A. Malatest & Associates Ltd.**

Andreas Rose

Airlie McCann

Ash Cullen

**From the BC Transit VRRRT Project Team**

Robert Broe

Jack Stuempel

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## **SECTION 1: INTRODUCTION AND BACKGROUND**

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### **1.1 The Study's Purpose and Objectives**

As a provincial crown agency, BC Transit provides public transit to British Columbia, excluding the Lower Mainland, and including all of Vancouver Island. As such, it is responsible for the management and operation of the Victoria Regional Transit System and the planning, funding, management, and contracting for transit systems for more than 50 municipal governments. One of the goals identified in the 2008 Provincial Transit Plan is to increase the Victoria region's transit ridership from 22 million passengers per year to 47 million passengers per year by 2030.

In order to achieve this goal, one initiative being undertaken and led by BC Transit is the Victoria Regional Rapid Transit Project (VRRTP). This project proposes developing a rapid transit corridor from the West Shore to Victoria. In the segment between uptown in Saanich and downtown Victoria, this corridor is proposed to run along Douglas Street. The options included in the initiative to be explored consist of a curbside or median arrangement on Douglas Street North and Southbound, or a Douglas-Blanshard or Douglas-Government couplet.

A key assessment required in the current phase is the identification and evaluation of potential effects that a rapid transit system might have on the businesses along the proposed transitway route. The objective of this research is to conduct surveys of businesses located along the uptown to downtown alignment and their customers to better understand the potential issues and opportunities associated with developing a rapid transit system along the proposed corridor.

### **1.2 Project Scope**

The VRRTP project aims to connect the West Shore communities with downtown Victoria. In October, 2009, BC Transit's Board of Directors approved the following corridor alignment

- Segment A – Colwood Corners to Six Mile along the Island Highway. The connection from Colwood Corners to Langford is being assessed with the municipality of Langford.
- Segment B – Six Mile to Uptown between the Trans Canada Highway/Galloping Goose
- Segment C – Uptown to Downtown along Douglas Street

The current research is concerned exclusively with Segment C. The area included in Segment C, referred to herein as the 'catchment area,' runs from Saanich Road to Belleville Street. While the original focus of the research was on businesses located on the main corridor streets, in consultation with BC Transit it was decided that businesses located on cross streets within one block of the proposed corridor would also be included.

#### Catchment Area

The catchment area includes all businesses and property owners whose property is located either on the main corridor street, or within one block of the main street on a cross street, within the following boundaries: Douglas Street between Saanich and Belleville, Blanshard between Queens and Humboldt, and Government between Hillside and Humboldt. While

businesses located on the cross streets were included in the survey, only customers visiting businesses along the main streets were surveyed. Below is a table outlining the boundaries of the catchment area, broken out by specific strata.

**Table 1.1: Survey Catchment Area Strata**

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

For the purposes of survey administration, strata 7 and 8 were sub-divided into two further sub-strata: Hillside to Tolmie, and Tolmie to Saanich. Substrata were created as it was understood that the types of businesses located between Hillside and Tolmie differ notably from those between Tolmie and Saanich and it was important to obtain representative samples from each sub-stratum. The Consultant made every effort to ensure completions from the uptown businesses were balanced according to the number of businesses in the two sub-strata. Due to the relatively small sample sizes, these sub-strata were recombined into strata 7 and 8 for the analysis.

### 1.2.1 Target Groups

The following three groups were identified as the primary groups of interest for the current study:

- a) Business owners/operators located along the proposed corridor or within one block of the proposed corridor;
- b) Commercial property owners whose property is located along the proposed corridor or within one block of the proposed corridor; and
- c) Customers of businesses located on the proposed corridor.

## 1.3 Sample Development

All businesses whose address was on the corridor or on a cross street within one block of the corridor were included in the sample. The list of these businesses was obtained through ASDE Survey Sampler. Duplicate, city, municipal, provincial, and federal listings were removed. Including businesses on the cross streets within one block of the corridors, the total number of businesses in the sample was 1,992.

The property owner sample also included all property owners whose property address was on the corridor or on a cross street within one block of the corridor. The property owner sample was obtained through BC Assessment. Considerable scrubbing of the property owner sample was required in order to minimize mail out duplication or redundancy. For example, in instances where multiple listings existed for owners of several units within one building, or for

several properties on adjacent or nearby streets, only one survey was mailed out to the property owner with respect to all units or locations. Additionally, if the property owner already existed in the business sample, if the property was listed as a government or city property, or if the property was a listing for an individual strata lot for individually owned strata hotel units (resort condos), the listing was removed. The total property owner sample was originally 958. After scrubbing and cleaning, the total sample consisted of 553 property owners who were not identified as also operating a business at the location.

The table below provides a breakdown of the total number of listings of businesses and property owners in the sample, by strata.

**Table 1.2: Sample Universe**

<b>STRATUM</b>	<b>Business Listings (1)</b>	<b>Property Owners (not identifiable as businesses)</b>	<b>Est. Total Universe (1)</b>
1. Downtown Douglas (corridor)	209	37	246
2. Downtown Blanshard and Government (corridor)	162	64	226
3. Downtown cross streets within one block of corridor streets	857	216	1073
<b>Downtown Subtotal</b>	<b>1,228</b>	<b>317</b>	<b>1,545</b>
4. Midtown Douglas (corridor)	101	31	132
5. Midtown Blanshard and Government (corridor)	92	28	120
6. Midtown cross streets within one block of corridor streets	152	58	210
<b>Midtown Subtotal</b>	<b>345</b>	<b>117</b>	<b>462</b>
7. Uptown Douglas (corridor)	252	36	288
8. Uptown cross streets within one block of corridor street	167	83	250
<b>Uptown Subtotal</b>	<b>419</b>	<b>119</b>	<b>538</b>
<b>CORRIDOR Subtotal (1,2,4,5,7)</b>	<b>816</b>	<b>196</b>	<b>1,012</b>
<b>CROSS STREETS Subtotal (3,6,8)</b>	<b>1,176</b>	<b>357</b>	<b>1,533</b>
<b>GRAND TOTAL</b>	<b>1,992</b>	<b>553</b>	<b>2,545</b>

(1) Figures for the universe are based on business listings provided by ASDE Survey Sampler, supplemented by lists of property owners who do not own businesses along the corridor (owners of properties listed in BC Assessment data who were identified as part of the business list sample were not added to the property owner lists). If a property owner was listed twice for commercial strata within one building, or for multiple properties that are adjacent or on the same block-face, listings were combined to reduce response burden. Figures are after obvious duplicates and non-qualifiers (e.g., local government) have been eliminated. If businesses were not listed with our sample provider, or as property owners, they may not be included in the sample, but they were allowed to participate in the survey.

The customer universe is unknown (i.e. no available information on typical numbers of customers of businesses per region, day of week, or time of day). A minimum target of 400 completions across all strata was set. In order to obtain relatively proportional representation of customer completions across all strata, general targets and survey schedules were set proportional to the number of businesses in the area. However, these targets were loose, and were meant only as a guide, as some areas have a higher volume of customer/client traffic relative to the number of businesses.

## **1.4 Survey Administration**

### **1.4.1 Survey Development**

Three separate surveys were designed – one for each target group: business owner/operators, property owners, and customers. If a respondent was both a business owner and a property owner, the business owner survey was administered. The main difference between the property owner and business surveys was in how certain questions were worded. Additionally, the property owner survey was shorter as it did not include questions related to the type of business and the hours of operation.

The first section of the business and property owner survey included questions about the business/property, including the type of property, the type of business in operation, and the size of the property. Both surveys also asked respondents about available parking and loading options for customers or tenants, and reasons that customers visit or that tenants rent the property. The remainder of the survey asked respondents a series of scale questions related to their opinions/perceptions as to the effects of various elements of rapid transit on their business or property. Respondents were also asked about their overall level of support for the development of rapid transit as a green alternative to connect the West Shore communities with the downtown.

In order to minimize the demand on respondents' time, the customer survey was designed to take no longer than about four minutes to complete. The survey collected demographic information about the respondent, the respondent's reason for being in the area, and the mode of transportation used to get to the area. Next, customers were asked about how various elements of a rapid transit system might affect their likelihood of visiting the area, and about their overall support for a rapid transit system as a green alternative to connect the West Shore communities with the downtown.

The surveys were designed in such a way as to allow for comparison of the responses of businesses and property owners with those of customers on a suite of key issues – particularly those relating to how the respondent might be affected by elements of a rapid transit system – in order to better understand similarities and differences in perceptions between the groups.

### **1.4.2 Survey Approach**

#### **Business and Property Owner Survey**

Invitation letters with personalized IDs were sent to businesses located in the catchment area. The letter was addressed to the business owner or operator, and provided a brief background of the project. Respondents were invited to complete the survey online, or they could download a PDF version of the survey from the website and return it either by fax or by mail. Follow up telephone calls were also made to businesses, providing them the opportunity to complete the survey by telephone. Telephoning occurred during the weekday, between 9:00 AM and 5:00 PM.

Property owners were also mailed invitation letters with personalized IDs. However, telephone numbers were not available for property owners, and follow-up calls were not possible, these

mail outs included a copy of the survey and a business reply envelope. Respondents could also complete the property owner survey online.

Survey completion targets were set for specific areas, based on the proportion of businesses located within the given area.

### Customer Survey

The customer survey was conducted as an in-person intercept survey. Individuals who were exiting a business were approached. If the individual was over the age of 16, and did not work at the business they exited, they were eligible to complete the survey. Surveying took place from Monday through to Sunday, between 9:00 AM and 6:00 PM.

Surveyors were scheduled to be in different areas at different times of the day and on different days of the week in order to ensure coverage of all locations at a variety of times.

## **1.5 Survey Completions by Strata and Call Disposition**

### Business and Property Owners Survey

Only business owners/operators were contacted by telephone for follow-up. The overall response rate for all businesses in the sample was 22%, and the refusal rate was only 4%. The table below presents the final call status of all business owners in the sample. In total, 22% of businesses were left a message, and 9% had soft appointments to call back at times when the business owner or manager might be in; any firm appointments to complete the survey with a specific respondent were honoured even after the minimum target completions were obtained.

**Table 1.3: Business Survey Call Disposition**

<b>Call Disposition</b>	<b>Number</b>	<b>Percentage</b>
Not Called*	468	23%
Not in Service / Wrong Number	156	8%
Incomplete	5	0%
<b>Completion</b>	<b>445</b>	<b>22%</b>
<b>Respondent Refusal</b>	<b>79</b>	<b>4%</b>
Non Qualifier	49	2%
Busy Signal/No Answer	58	3%
Appointment	174	9%
Left Message/Call Again	448	22%
Other	17	1%
Will do Online	93	5%
<b>TOTALS</b>	<b>1,992</b>	<b>100%</b>

\*These businesses were not called, as the number of completions obtained in their survey strata exceeded the targets before they could be contacted. However, these businesses were included in the mail out, and were given the opportunity to complete the survey online, or to telephone in to do the survey by phone.

Among property owners, 553 were sent the survey by mail, and 74 were completed and received by the deadline for submission. This represents a response rate of 13%. Combined, the overall response rate of businesses and property owners combined was 20% (see Table 1.5).

**Table 1.4: Property Owner Survey Response (Mail Out Only)**

Status	Number	Percentage
<b>Completion</b>	<b>74</b>	<b>13%</b>
Incomplete	1	0%
No Response	478	86%
<b>TOTALS</b>	<b>553</b>	<b>100%</b>

The minimum number of survey completions for the business and property owner surveys was 350 combined. The target number of completions by strata (response rate target) was based on the proportion of businesses and property owners in the strata compared to the entire universe. Overall, the number of business and property owner survey completions obtained (519) exceeded the targets set.

**Table 1.5: Business and Property Owner Survey Completions and Response Rate**

STRATUM	Number in Universe	# Surveys Completed	Gross Response Rate*
1. Downtown Douglas (corridor)	246	77	31%
2. Downtown Blanshard and Government (corridor)	226	73	32%
3. Downtown cross streets within one block of corridor streets	1,073	131	12%
<b>Downtown Subtotal</b>	<b>1,545</b>	<b>281</b>	<b>18%</b>
4. Midtown Douglas (corridor)	132	41	31%
5. Midtown Blanshard and Government (corridor)	120	36	30%
6. Midtown cross streets within one block of corridor streets	210	37	18%
<b>Midtown Subtotal</b>	<b>462</b>	<b>114</b>	<b>25%</b>
7. Uptown Douglas (corridor)	288	78	27%
8. Uptown cross streets within one block of corridor street	250	46	18%
<b>Uptown Subtotal</b>	<b>538</b>	<b>124</b>	<b>23%</b>
<b>CORRIDOR Subtotal (1,2,4,5,7)</b>	<b>1,012</b>	<b>305</b>	<b>30%</b>
<b>CROSS STREETS Subtotal (3,6,8)</b>	<b>1,533</b>	<b>214</b>	<b>14%</b>
<b>GRAND TOTAL</b>	<b>2,545</b>	<b>519</b>	<b>20%</b>

Gross response rate = # Surveys completed (n) / # Universe (N) eg 77/246 = 31%

Proportion of surveys completed = # of surveys completed / 519 (grand total of surveys completed)

#### Data Weighting and Sample Error

The following table describes the eight strata, the universe proportions, the number of survey completions achieved for each strata, the sample error, and the weight applied to each strata to make the distribution consistent with the universe.

The overall results of this survey may be considered to be generally reliable, within a margin of error of  $\pm 4.2\%$  at a 95% confidence level (i.e. 19 times out of 20). Users of the survey results should be cautioned that the sample error is higher for survey proportions reported for smaller

subgroups (strata) within the sample. Sample errors for each of the strata are listed in Table 1.6. Sample errors were calculated taking into account the over/under sampling of different strata and the effects of weighting on the error.

It was not within the scope of this project to undertake tests of statistical significance on survey results cross tabulated by group. Therefore caution should be exercised when comparing smaller sub-groups: some differences (particularly small differences) may not be statistically significant.

**Table 1.6: Business/Property Owner Survey Distribution, Data Weighting, and Sample Error**

STRATUM	Universe	Proportion of Universe	Actual number of Completions	Proportion of Completions	Weighted Completions Proportional to Universe	Weight	Sample Error ( $\pm\%$ ) <sup>(1)</sup>
1. Downtown Douglas (corridor)	246	10%	77	15%	50	0.651514	9.3%
2. Downtown Blanshard and Government (corridor)	226	8%	73	14%	46	0.631343	9.5%
3. Downtown cross streets within one block of corridor streets	1,073	43%	131	25%	219	1.670352	8.0%
<b>Downtown Subtotal</b>	<b>1,545</b>	<b>62%</b>	<b>281</b>	<b>54%</b>	<b>315</b>	-	<b>5.8%</b> ( $D_{eff}=1.21$ ) <sup>(2)</sup>
4. Midtown Douglas (corridor)	132	5%	41	8%	27	0.656553	12.8%
5. Midtown Blanshard and Government (corridor)	120	5%	36	7%	24	0.679764	13.7%
6. Midtown cross streets within one block of corridor streets	210	8%	37	7%	43	1.157436	14.7%
<b>Midtown Subtotal</b>	<b>462</b>	<b>17%</b>	<b>114</b>	<b>22%</b>	<b>94</b>	-	<b>8.2%</b> ( $D_{eff}=1.07$ )
7. Uptown Douglas (corridor)	288	13%	78	15%	59	0.752970	9.5%
8. Uptown cross streets within one block of corridor street	250	8%	46	9%	51	1.108311	13.1%
<b>Uptown Subtotal</b>	<b>538</b>	<b>21%</b>	<b>124</b>	<b>24%</b>	<b>110</b>	-	<b>7.9%</b> ( $D_{eff}=1.038$ )
<b>CORRIDOR Subtotal (1,2,4,5,7)</b>	<b>1,012</b>	<b>41%</b>	<b>305</b>	<b>59%</b>	<b>206</b>	-	<b>4.7%</b> ( $D_{eff}=1.005$ )
<b>CROSS STREETS Subtotal (3,6,8)</b>	<b>1,533</b>	<b>59%</b>	<b>214</b>	<b>41%</b>	<b>313</b>	-	<b>6.3%</b> ( $D_{eff}=1.035$ )
<b>GRAND TOTAL</b>	<b>2,545</b>	<b>100%</b>	<b>519</b>	<b>100%</b>	<b>519</b>	-	<b>4.2%</b> ( $D_{eff}=1.179$ )

<sup>(1)</sup> Sample error = the maximum variation of survey response proportions for the given sub-group, at a 95% confidence level (19 times out of 20).

<sup>(2)</sup> For subtotals combining strata which are over or under-sampled, the sample design effect,  $D_{eff}$ , determines the actual sample error after weighting of the survey data is taken into account.  $D_{eff} = 1$  (i.e., no design effect) for samples with no over-/under-sampling of substrata.

## Customer Survey

The target for the minimum number of customer survey completions was 400. The total number of surveys obtained was 442. While the actual number of completions obtained in the midtown strata was slightly lower than targeted, overall the number obtained was greater than the target set. Table 1.7 below summarizes the number of completions obtained by strata. Weighting of the customer data was not undertaken, as there is no information available against which to benchmark customer volumes by strata.

The margin of error for the customer survey is  $\pm 4.7\%$  at a 95% confidence level. As with the business survey, results for sub-groups with smaller sample sizes should be interpreted with caution, and testing for statistical significance was not undertaken.

**Table 1.7: Customer Survey Completions by Strata**

<b>STRATUM</b>	<b># Completions</b>	<b>Proportion</b>	<b>Sample Error (<math>\pm\%</math>)<sup>(1)</sup></b>
1. Downtown Douglas (corridor)	117	26%	9.1%
2. Downtown Blanshard and Government (corridor)	117	26%	9.1%
3. Downtown cross streets within one block of corridor streets	n/a	n/a	
<b>Downtown Subtotal</b>	<b>234</b>	<b>52%</b>	<b>6.4%</b>
4. Midtown Douglas (corridor)	42	10%	15.1%
5. Midtown Blanshard and Government (corridor)	20	5%	21.9%
6. Midtown cross streets within one block of corridor streets	n/a	n/a	
<b>Midtown Subtotal</b>	<b>62</b>	<b>15%</b>	<b>12.4%</b>
7. Uptown Douglas (corridor)	146	33%	8.1%
8. Uptown cross streets within one block of corridor street	n/a	n/a	
<b>Uptown Subtotal</b>	<b>146</b>	<b>33%</b>	<b>8.1%</b>
<b>TOTAL</b>	<b>442</b>	<b>100%</b>	<b>4.7%</b>

<sup>(1)</sup> Sample error calculated using formula for unknown population size.

## Data analysis

All percentages presented in the tables and charts in this report are based on the total number of respondents to the given question. Respondents who did not provide an answer or who responded 'don't know' have been excluded. Therefore, the sample size, 'n', reported in each table and chart varies, and does not always equal 519 in the case of the business and property owner survey or 442 in the case of the customer survey.

## Caveats

Many of the findings represent respondent perceptions, and will not necessarily translate into actions or reality. Respondent opinion and behaviours may vary from the survey results once actual routes, fares, schedules, transit mode, and corridor development options are better understood. Respondents were only provided a very brief description of what the rapid transit system might look like.

Cautions should also be taken when interpreting the results by sub-strata as the smaller sample sizes result in larger margins of error. It was not within the scope of this project to test the statistical significance of all differences observed by survey strata. Overall the results can be considered reliable, but they become less reliable with smaller sample sizes.

It should also be noted that while the business/property owner survey results are weighted for representation by geographic strata, there may be sources of response bias that cannot be accounted for. For instance, no adjustment or weighting was done based on business type.

## SECTION 2: PERCEPTIONS OF BUSINESSES AND PROPERTY OWNERS

This section of the report describes the results from the business and property owners survey. Readers are cautioned that many of the responses are the perceptions of the business owners/managers and property owners who responded to the survey and do not necessarily reflect quantifiable facts.

### 2.1 Profile of Businesses

#### 2.1.1 Building and Business Type, and Square Footage of Business

In order to gain a better understanding of the nature of the businesses located within the catchment area, respondents were asked about their size, location, business type, hours of operation, and busiest hours.

As displayed in Table 2.1, the majority (65%) of respondents were classified as medium sized, occupying a floor space of between 1,000 and 10,000 square feet. The highest proportion (26%) of smaller businesses (less than 1,000 square feet) were located downtown, while one in five businesses in both the midtown and the uptown could be classified as large (10,000 to 100,000 square feet).

**Table 2.1: Size of Business/Property by Square Footage**

LOCATION	Small (<1,000 Sq Ft)	Medium (1,000-10,000 Sq Ft)	Large (10,000-100,000 Sq Ft)	Very Large (>100,000 Sq Ft)
Downtown	26.0%	63.2%	10.3%	0.5%
Midtown	7.1%	71.4%	20.0%	1.4%
Uptown	9.3%	65.1%	20.9%	4.7%
<b>TOTAL</b>	<b>18.3%</b>	<b>65.3%</b>	<b>14.7%</b>	<b>1.7%</b>

Source: Business Survey, n=360

Respondents were asked to classify the type of building their business/property is located in. The following options were provided:

Mall: a large complex containing a variety of stores, restaurants and other businesses, housed in a single large building, such as Mayfair Mall or the Bay Centre. Businesses are primarily accessed from inside the building complex.

Strip Mall: a complex consisting of stores or restaurants in adjacent spaces in one long building. Typically, access to each business is from outside, and parking is directly in front of the stores.

Office Building: a commercial building made up of areas designed to be used mainly for offices, and for administrative and managerial work.

Building with Storefront on the Street: a building where the entrance to the business is located directly on the street. It is different from a strip mall in that it is not necessarily adjacent to other stores or restaurants, and is not in complex with other stores or businesses.

Other: these included examples such as a warehouse or a house that has been converted into an office.

In terms of the commercial location of the businesses surveyed, a slight majority (55%) were located in buildings with a store front on a street, followed by just over one-quarter (26%) that were located in an office building. The largest proportion of businesses operating within a mall was in the uptown (21%), the area in which Mayfair Mall is located.

**Table 2.2: Commercial Location of Business/Property**

<b>LOCATION</b>	<b>Mall</b>	<b>A strip mall</b>	<b>An office building</b>	<b>Building with store front on the street</b>	<b>Other</b>
Downtown	5.6%	1.5%	31.6%	59.0%	2.3%
Midtown	0.0%	15.8%	22.8%	58.8%	2.6%
Uptown	21.0%	16.8%	16.8%	40.3%	5.0%
<b>TOTAL</b>	<b>8.0%</b>	<b>8.4%</b>	<b>26.1%</b>	<b>54.5%</b>	<b>3.0%</b>

Source: Business Survey, n=499

Businesses were also asked to classify their business according to the following categories:

- Retail
- Wholesale
- Food and Beverage
- Accommodation
- Personal Services (e.g. dry cleaning, hair cutting)
- Business Services (e.g. temp agencies, business software developers)
- Professional Services (e.g. law firms, accountants, and engineers)
- Health/Hospital/Medical Clinic
- Entertainment and Recreation (theatres, etc.)
- Manufacturing
- Transportation/Warehousing
- Other

As shown in Table 2.3, the largest proportion of businesses surveyed (30%) classified themselves as retail, followed by business services (18%) and professional services (17%). The downtown area had the highest proportion of professional service-oriented businesses (21%), while the midtown held the greatest number of business-services respondents (30%). Businesses classified as 'other' included banks and other financial institutions, and education.

**Table 2.3: Type of Business**

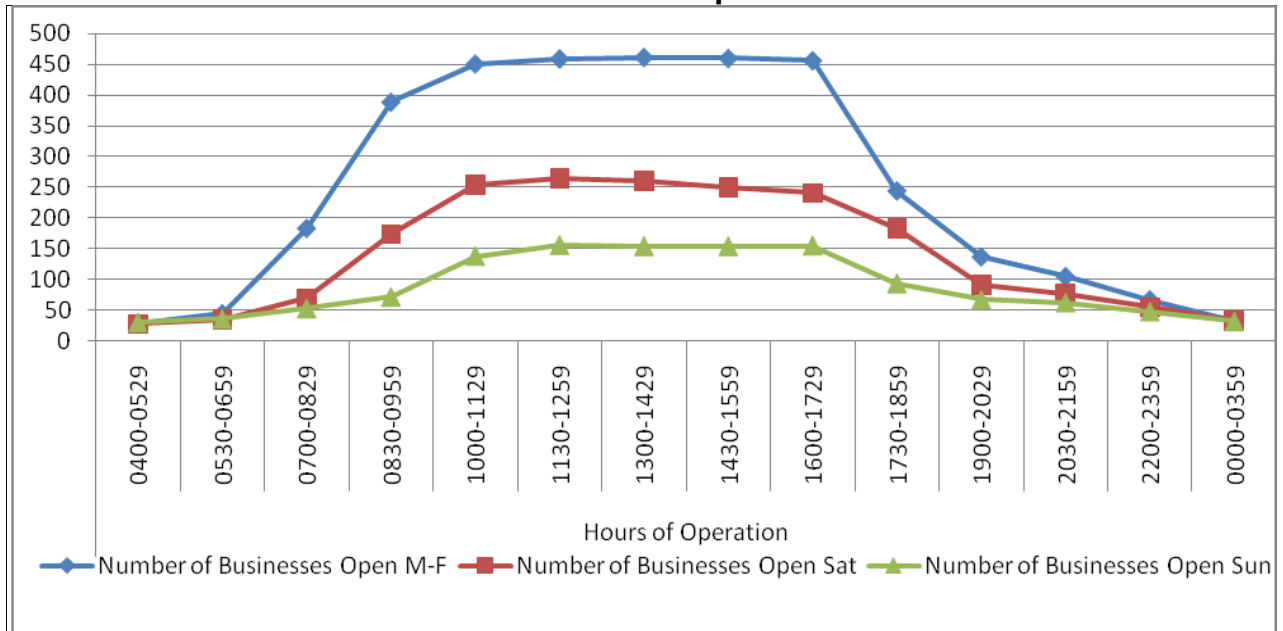
<b>LOCATION</b>	<b>Retail</b>	<b>Food and Beverage</b>	<b>Personal Services</b>	<b>Business Services</b>	<b>Professional Services</b>	<b>Wholesale, Manufacturing, Transportation, Warehousing</b>	<b>Other</b>
Downtown	25.7%	15.0%	5.0%	11.4%	21.4%	0.4%	20.7%
Midtown	32.1%	1.8%	5.4%	29.5%	15.2%	8.9%	7.1%
Uptown	36.4%	11.6%	5.0%	20.7%	9.9%	5.8%	10.7%
<b>TOTAL</b>	<b>29.6%</b>	<b>11.3%</b>	<b>5.1%</b>	<b>17.5%</b>	<b>17.3%</b>	<b>3.5%</b>	<b>15.4%</b>

Source: Business Survey, n=513

The hours of operation and peak operating hours of businesses in the survey area are detailed in Charts 2.1 and 2.2 below. As can be observed, most businesses were open during conventional business hours; peaking by 10:00 AM and declining after 5:30 PM, Monday through Friday. Approximately half of the businesses surveyed were also open on Saturdays, following a similar pattern of operating hours.

Businesses were also asked what the busiest times of day were for them. Respondents were given the option to provide up to three different busy times. Slightly less than half of respondents reported busy times, the remainder presumably have steady business all day, or could not identify their busiest times, or have businesses that do not observe customer flows (i.e. businesses other than retail, food, personal services). Amongst businesses that reported busy times, peak or busiest times were observed between 1:00 PM and 2:30 PM. The two charts that follow illustrate these findings.

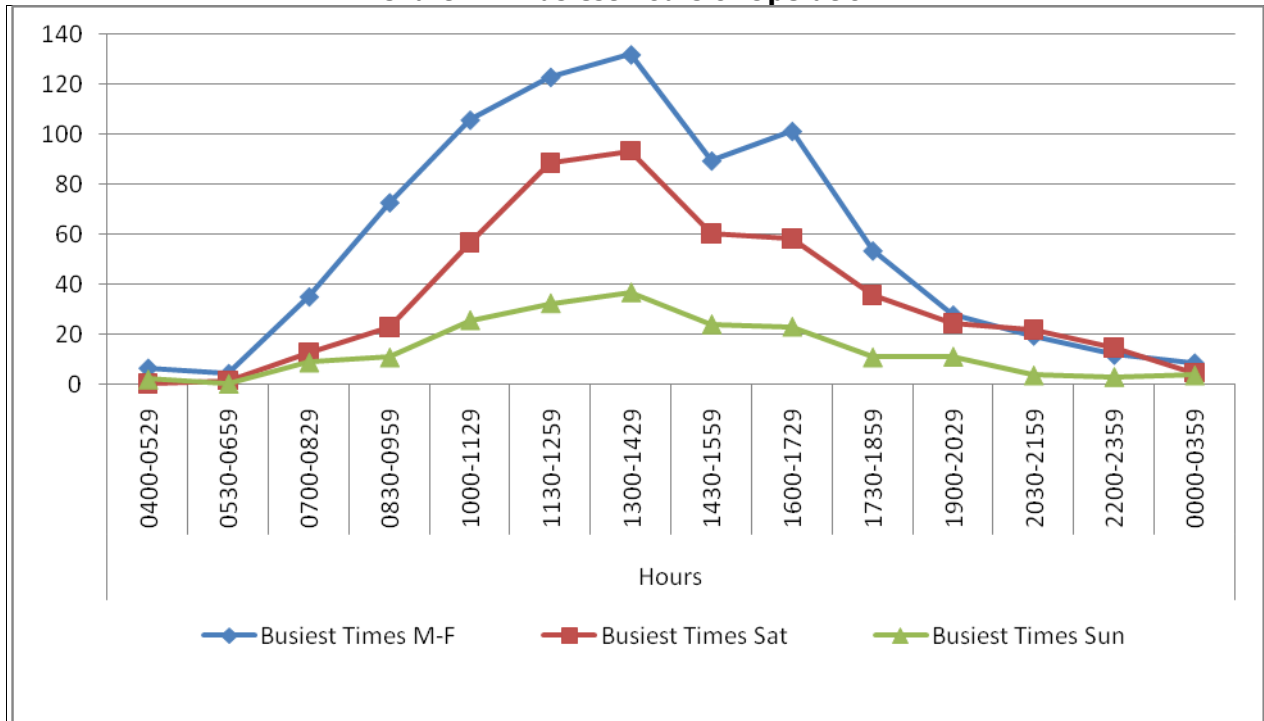
**Chart 2.1: Hours of Operation**



Source: Business Survey, n=475

Note: the numbers in the chart reflect the numbers of survey respondents (with data weighted for representation by survey strata) and do not reflect the total number of businesses in the area.

**Chart 2.2: Busiest Hours of Operation**



Source: Business Survey, n=234

Note: Based on businesses that reported peak busy times.

## 2.2 Customer/Cientele Demographics

Businesses were asked a series of questions to determine their perception of the general profile of their customers/ clientele. Information collected included the ages and common mode of transportation of customers as well as geographical areas where customers originate. Also taken into consideration was the perception of businesses regarding the main reasons a customer would choose to visit their business in particular. Readers are reminded that these are all opinions and perceptions of businesses, and can therefore not be considered verified facts.

### 2.2.1 Age of Customers/Cientele and Common Mode of Transportation Used

#### Age of Customers/Cientele

When respondents to the business survey were asked the most common age ranges of their customers, the responses were similar across all geographic locations. Overall, the most common age range reported by businesses was 40-49 years of age (82%), followed closely by those aged 30-39 (77%) and 50-64 (73%). Table 2.4 illustrates that while there is little difference in age range across location, the uptown businesses more commonly reported having core customers in the 20-29 year range (74%) than businesses in the midtown (55%) or the downtown (52%) areas.

**Table 2.4: Age Ranges of Customers/ Clientele**

<b>LOCATION</b>	<b>Younger than 16</b>	<b>16-19</b>	<b>20-29</b>	<b>30-39</b>	<b>40-49</b>	<b>50-64</b>	<b>65+</b>
Downtown	10.1%	23.4%	51.9%	74.7%	79.0%	71.5%	47.1%
Midtown	8.4%	23.7%	55.1%	75.4%	84.1%	75.9%	46.1%
Uptown	10.0%	19.7%	73.7%	86.9%	88.8%	75.8%	47.9%
<b>TOTAL</b>	<b>9.8%</b>	<b>22.6%</b>	<b>57.2%</b>	<b>77.4%</b>	<b>82.1%</b>	<b>73.3%</b>	<b>47.1%</b>

Source: Business Survey, n=460

Note: Percentages sum to greater than 100% due to multiple responses.

### Mode of Transportation Used to Get to the Business

Businesses were also asked to estimate the proportion of customers who use various modes of transportation to reach them. As shown in Table 2.5 the majority of respondents (63%) indicated that their customers drive cars most often, whereas walking and taking public transportation are perceived as substantially less common at 13% respectively. The uptown and midtown businesses were more likely to report that their customers drive cars (81% and 76% respectively), compared to downtown businesses (53%). Of note, while downtown businesses perceive that one out of five (20%) of their customers walk to their location, only 6% of the midtown respondents and 2% of the uptown respondents believe their customers walk to their businesses. Similarly, the downtown businesses were more than twice as likely to report their customers take public transit (17%), as businesses in either the midtown (7%) or the uptown (8%). Figures are the average percent reported by respondents.

**Table 2.5: Mode of Transportation Used to Reach Businesses**

<b>LOCATION</b>	<b>Drive car</b>	<b>Walk</b>	<b>Public Transit</b>	<b>Taxi</b>	<b>Motorcycle</b>	<b>Other (please specify)</b>	<b>Don't Know</b>
Downtown	52.8%	19.5%	17.0%	4.0%	0.5%	2.3%	3.9%
Midtown	76.0%	5.7%	7.0%	2.3%	1.2%	2.3%	5.6%
Uptown	81.1%	2.0%	7.9%	1.0%	1.2%	2.6%	4.1%
<b>TOTAL</b>	<b>63.3%</b>	<b>13.1%</b>	<b>13.2%</b>	<b>3.0%</b>	<b>0.8%</b>	<b>2.4%</b>	<b>4.3%</b>

Source: Business Survey, n=452

## 2.2.2 Geographic Location of Customer Base and Reasons for Visits

### Geographic Location Where Most Business Comes From

Survey respondents were asked where they perceive the majority of their customers/clientele come from. Broken out geographically, Table 2.6 summarizes the responses. Not surprisingly,

all businesses reported the majority of their customers/clientele originate in the City of Victoria with 91% selecting this as a response, with similar proportions given by uptown, midtown and downtown businesses. Uptown and midtown businesses consistently perceive a greater magnitude of customers from areas such as Saanich (uptown 82%, midtown 76%, downtown 52%), and Oak Bay (uptown 71%, midtown 70%, downtown 51%). Interestingly, downtown businesses reported their customers/clientele came from outside of BC 28% of the time (midtown 15%, uptown 8%) and from the Lower Mainland 19% of the time, a figure that is likely indicative of the greater influx of tourists in the downtown core.

**Table 2.6: Customer/Clientele Origin (% of businesses indicating origin of main customer/clientele)**

Area	Downtown	Midtown	Uptown	Total
Within the City of Victoria	89.8%	92.1%	93.5%	<b>91.0%</b>
Saanich	52.4%	75.8%	82.4%	<b>63.1%</b>
Oak Bay	51.2%	70.2%	71.3%	<b>59.0%</b>
Esquimalt	49.1%	67.7%	71.7%	<b>57.3%</b>
Central Saanich/North Saanich/Sidney	38.1%	58.1%	70.1%	<b>48.5%</b>
Colwood	39.6%	58.7%	64.3%	<b>48.4%</b>
Langford/Metchosin/Sooke	39.6%	56.6%	65.9%	<b>48.3%</b>
View Royal/Highlands	38.6%	58.7%	66.7%	<b>48.2%</b>
Other on Vancouver Island	23.3%	37.3%	34.4%	<b>28.2%</b>
Outside BC	27.9%	15.4%	7.7%	<b>21.4%</b>
Lower Mainland	18.5%	14.8%	10.0%	<b>16.0%</b>
Other in BC	14.7%	12.1%	8.4%	<b>12.9%</b>

Source: Business Survey, n=466

### Top Reasons Customers Visit the Business or Rent /Lease the Property

When asked their opinion of the top three reasons customers choose to visit their business<sup>1</sup>, the majority of respondents reported that it was to seek specific products or services (76%). This supports respondents' estimation that most visitors to their establishment plan their visit (82% average) as opposed to visiting on impulse (18% average). Table 2.7 presents business' perceptions on the proportion of customer visits that are planned versus impulse. Midtown businesses were most likely to report their customer visits are planned, and they also report the highest percent of customers who visit for the specific products and services.

<sup>1</sup> Respondents who indicated they did not operate a business at the property were not provided all the options provided to business operators, including "to seek specific products/services", "work in the neighbourhood", and "live nearby".

**Table 2.7: Business Perception of Customer Visits**

	<b>Planned Visits % (business perception)</b>	<b>Impulse Visits % (business perception)</b>
Downtown	81.4%	18.6%
Midtown	86.0%	14.0%
Uptown	78.8%	21.2%
<b>TOTAL</b>	<b>81.8%</b>	<b>18.2%</b>

Source: Business Survey, n=454

Easy access by motor vehicle was the second most commonly selected response by business owners, but it is those respondents in the uptown and midtown, at 40% respectively, who comprise the bulk of these, as only 10% of downtown businesses chose this as one of the top three reasons. By contrast, the third most popular response, "Work in the neighbourhood," was selected by nearly one out of four respondents in the downtown (24%), whereas midtown and uptown businesses selected this option 10% and 11% of the time respectively.

Further observations of note include the availability of on-site parking which is understandably one of the top reasons uptown businesses perceive customers visit them, with 32% choosing it as one of the top three reasons, followed by midtown with just over half as many (17%) and downtown reporting only a marginal response (6%). The availability of on-street parking (directly in front of the business/property) was cited by 6% of the downtown respondents, 13% of the midtown respondents, and 8% of the uptown respondents. Readers are reminded that these figures include both corridor and cross streets. Table 2.8 summarizes all response options and the proportion of business operators who believe customers choose them for the identified reason.

**Table 2.8: Top Reasons Customers Choose to Visit Business**

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

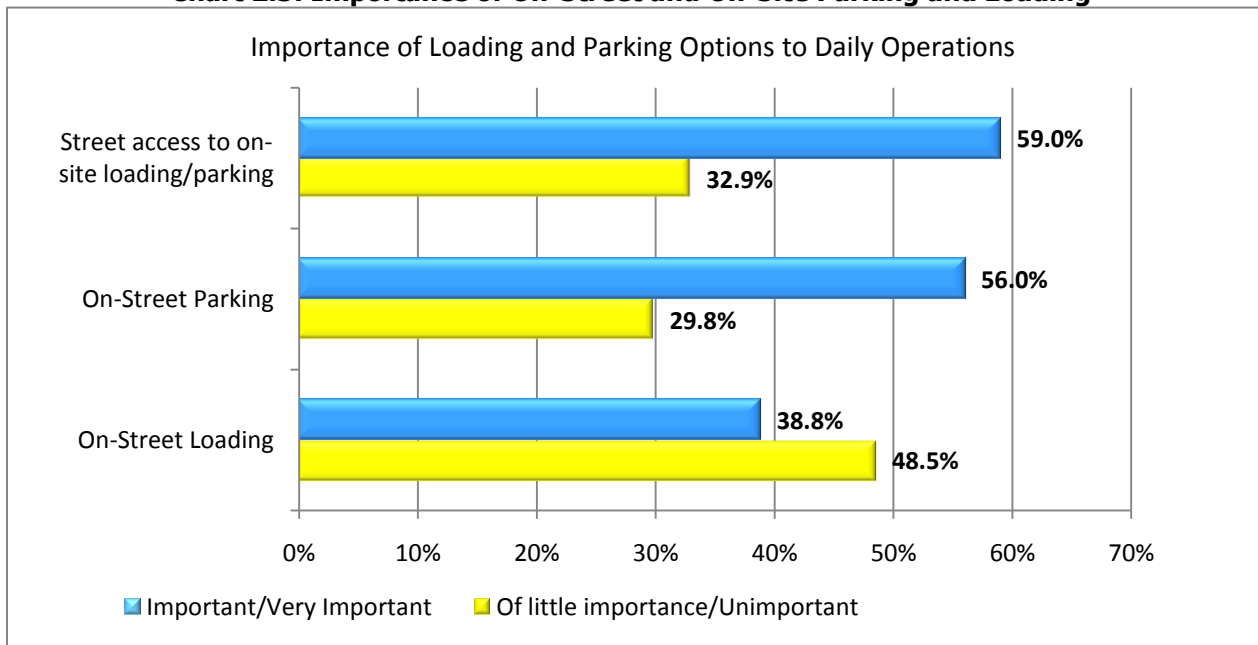
Source: Business Survey, n=495

Note: percentages sum to greater than 100% due to multiple responses.

### 2.3 Access to Loading and Parking Options

Businesses were asked about how important on-street loading and parking are to their daily operations, and about other loading and parking options available to them and their customers. They were further asked what strategies they would implement should there be changes in access to on-street loading and parking. This section highlights their responses. The chart below summarizes the level of importance of each to the businesses daily operations.

**Chart 2.3: Importance of On-Street and On-Site Parking and Loading**



Source: Business Survey, n=467-473

As indicated in the chart above, street access to on-site parking/loading, on-street parking, and on-street loading are important or very important to a considerable proportion of businesses. The results are discussed in greater detail below.

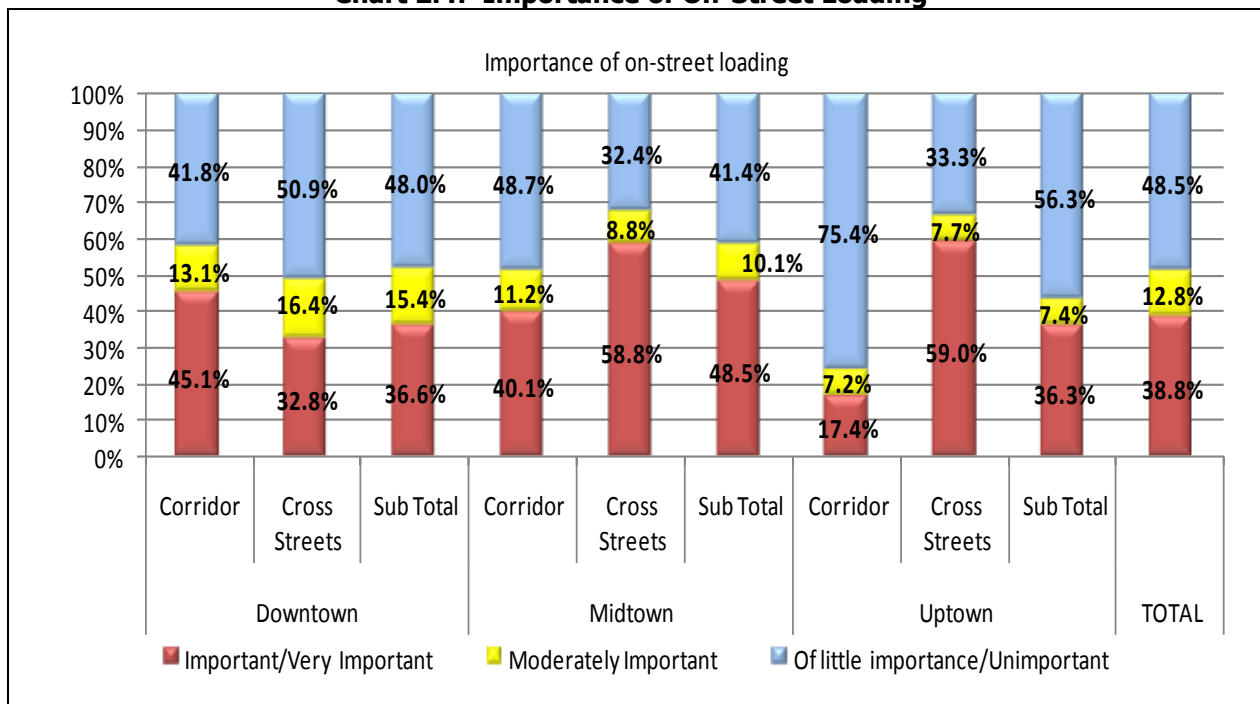
### 2.3.1 Loading

#### On-Street Loading

With respect to the importance of on-street loading, 39% of all businesses surveyed considered it "important" or "very important" while 13% considered it "moderately important". About half (49%) indicated that it was "not at all important" or "of little importance".

Of particular interest are the responses of businesses on corridor streets (who would be directly affected by changes to streets that might affect on-street loading). In total, 45% of businesses on downtown corridor streets, 40% of those on the midtown corridor streets, and only 17% of those on the uptown corridor streets indicated that on-street loading was an important or very important part of their every day operation.

**Chart 2.4: Importance of On-Street Loading**



Source: Business Survey, n=467

## Other Loading Options

Both businesses and property owners were asked about the availability of loading options for their business customers or property, other than on-street. The largest portion of respondents, 47%, reported that they had no other loading options. Readers are reminded, however, that fewer than half (39%) of all businesses reported that on-street loading was an important part of their daily operations. Therefore, when considering the responses below, it cannot be assumed that those who report that they have no other options for loading other than on-street would be negatively affected by changes to on-street loading. The most common alternative selected by respondents who reported having access to other loading options was on-site loading, either where access is from the business' main street or access is from a side street.

**Table 2.9: Availability of Other Loading Options**

		NO	YES	On-site (access from side street)	On-site (access from main street)	On a side street
Downtown	Corridor	54.7%	45.3%	41.2%	13.0%	54.0%
	Cross Streets	50.4%	49.6%	44.0%	46.0%	28.0%
	<b>Total</b>	<b>51.7%</b>	<b>48.3%</b>	<b>43.1%</b>	<b>35.5%</b>	<b>36.3%</b>
Midtown	Corridor	49.3%	50.7%	54.2%	38.0%	18.6%
	Cross Streets	51.4%	48.6%	43.8%	56.3%	18.8%
	<b>Total</b>	<b>50.2%</b>	<b>49.8%</b>	<b>49.7%</b>	<b>45.8%</b>	<b>18.7%</b>
Uptown	Corridor	18.2%	81.8%	68.3%	58.3%	25.0%
	Cross Streets	39.1%	60.9%	50.0%	53.6%	21.4%
	<b>Total</b>	<b>28.0%</b>	<b>72.0%</b>	<b>60.9%</b>	<b>56.4%</b>	<b>23.5%</b>
<b>TOTAL</b>		<b>46.4%</b>	<b>53.6%</b>	<b>50.0%</b>	<b>43.8%</b>	<b>29.0%</b>

Note: Percentages sum to greater than 100% due to multiple responses – respondents were asked to select all that applied. Percentages recorded in the options are based on the number of respondents who said 'yes'.

Source: Business and Property Owner Survey, n=519

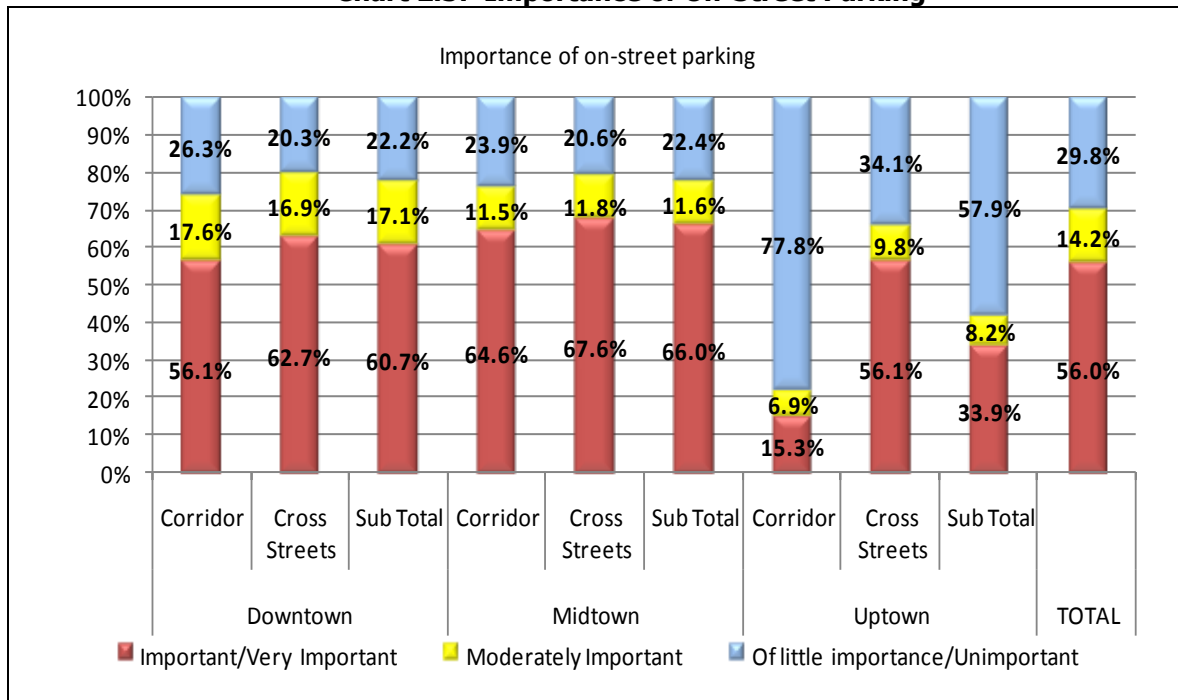
Of note are the responses of those on corridor streets. On the downtown corridor streets, 55% of businesses indicated that they had no other options than on-street loading. The proportion was similar among the midtown corridor respondents, at 49%. Those on the uptown corridor were much less likely to report having no alternatives, with only 18% indicating that they were in this situation. Readers are reminded that the responses for uptown businesses may be heavily influenced by businesses in Mayfair Mall.

## 2.3.2 Parking

### On-Street Parking

According to survey respondents, businesses in the downtown and the midtown are more likely to report on-street parking as an important or very important part of their daily business operations, with 61% and 66% respectively reporting this, compared with only 34% of businesses in the uptown.

**Chart 2.5: Importance of On-Street Parking**



Source: Business and Property Owner Survey, n=473

Note: Percentages sum to greater than 100% due to multiple responses – respondents were asked to select all that applied.

Looking specifically at corridor streets, 56% of downtown, 65% of midtown, and 15% of uptown corridor respondents indicated that on-street parking was important. A high proportion of businesses on the uptown corridor indicated that on-street parking was of little or no importance (78%). Again, this portion of the sample includes businesses in Mayfair Mall, but may also indicate more on-site parking at other properties along the corridor as well.

## Other Parking Options

The majority of respondents (89%) reported access to other parking options besides on-street. Percentages are relatively consistent across all three geographic locations. However, the proportions of respondents who have access to each of the different options vary considerably. In the downtown, the majority (77%) reported availability of a pay parking lot, and an additional 31% reported availability of parking on a side street. Only 5% of uptown respondents have pay parking available to their customers. By contrast, respondents in the midtown and the uptown were most likely to report having on-site parking – with either access from a side street or a main street. Again, proportions of respondents on corridor streets who cite that their customers have no other options than on-street parking may be of particular interest in making planning decisions: downtown corridor streets (19%), midtown (25%), uptown (13%).

**Table 2.10: Availability of Other Parking Options**

		NO	YES	Pay parking lot	On-site (access from side street)	On-site (access from main street)	On a side street
Downtown	Corridor	19.3%	80.7%	82.4%	14.2%	10.9%	46.6%
	Cross Streets	20.6%	79.4%	74.8%	14.6%	22.3%	23.3%
	<b>Total</b>	<b>20.2%</b>	<b>79.8%</b>	<b>77.1%</b>	<b>14.4%</b>	<b>18.8%</b>	<b>30.5%</b>
Midtown	Corridor	24.6%	75.4%	20.6%	48.2%	46.8%	20.6%
	Cross Streets	27.0%	73.0%	25.9%	55.6%	29.6%	22.2%
	<b>Total</b>	<b>25.7%</b>	<b>74.3%</b>	<b>23.0%</b>	<b>51.5%</b>	<b>39.1%</b>	<b>21.3%</b>
Uptown	Corridor	13.0%	87.0%	6.0%	73.1%	61.2%	14.9%
	Cross Streets	28.3%	71.7%	3.0%	54.5%	57.6%	12.1%
	<b>Total</b>	<b>20.1%</b>	<b>79.9%</b>	<b>4.7%</b>	<b>65.3%</b>	<b>59.7%</b>	<b>13.7%</b>
<b>TOTAL</b>		<b>21.2%</b>	<b>78.8%</b>	<b>52.2%</b>	<b>31.9%</b>	<b>31.2%</b>	<b>25.3%</b>

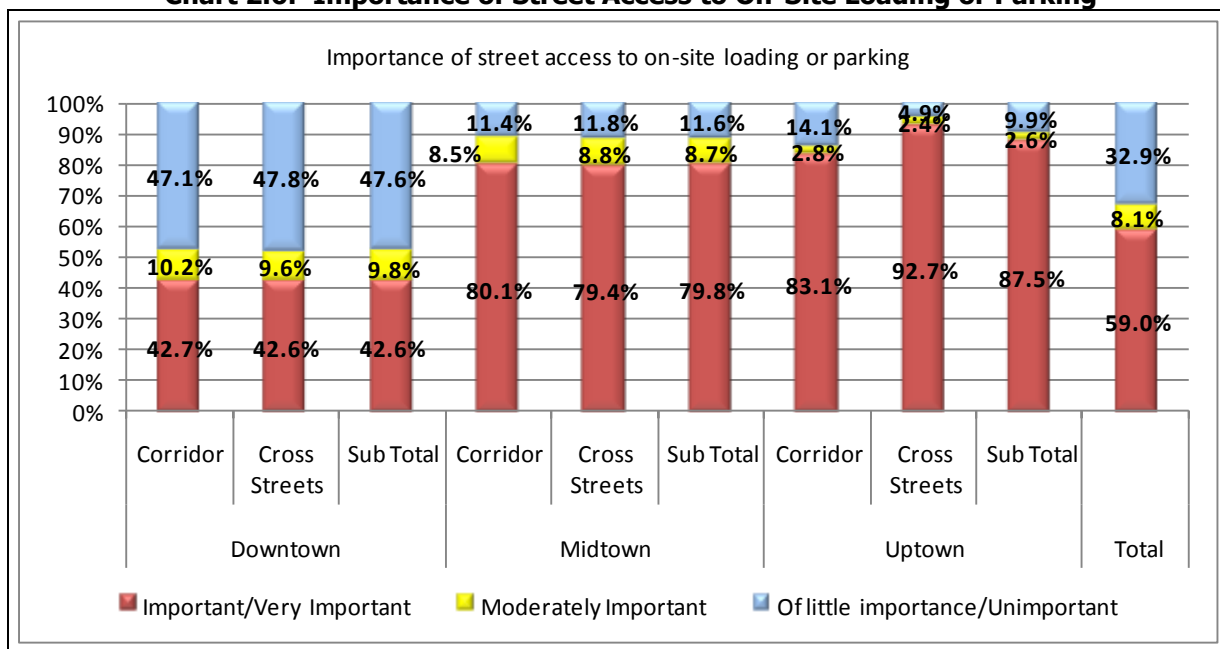
Source: Business and Property Owner Survey, n=519

Note: Percentages sum to more than 100% due to multiple responses.

## Drive in Street Access from to On-Site Loading or Parking

The business survey asked respondents how important street access from their street to an on-site loading or parking area was to their daily operations. The degree of importance increases notably from the downtown to the uptown. Overall, 43% of downtown businesses cited this as important, whereas twice as many uptown respondents (88%) found it important. These findings could be due in part to less on-site loading and parking among businesses in the downtown. With only 8% reporting this feature as 'moderately' important, there is little ambiguity amongst respondents on this issue: they tend to either have and depend on on-site loading/parking, or they don't. Very little difference can be detected between the corridor and cross street respondents, though a slight difference of opinion exists among uptown businesses.

**Chart 2.6: Importance of Street Access to On-Site Loading or Parking**



Source: Business Survey, n=469

## Strategies to Mitigate Effects of Changes to On-Street Parking or Loading

Respondents were asked what strategies they might implement if there were changes made to on-street loading and/or parking on Douglas, Blanshard, or Government. Unlike other questions, respondents were not given options to select from. Rather, the question was asked in an open-ended format. Responses were reviewed and coded into common themes. In total, 100 respondents provided an example of a strategy they would implement. Others either did not answer, did not know, or did not feel it was applicable to their situation. Several respondents also made comments that were unrelated to the question. All of these have been removed from the totals presented in the table. Each comment was coded into one theme only, therefore the totals sum to 100%. The most common response was related to asking the city to change the current parking and loading rules, regulations, or fees. This was cited by 30% of those who commented, (which represents 5% of all respondents surveyed who reported operating a business – 478). The next most common response related to moving or relocating the business, or else changing the business strategy. However, while 24% of comments noted this, it represents 4% of all respondents surveyed who reported operating a business.

**Table 2.11: Strategies to Deal with Changes in On-Street Parking/Loading**

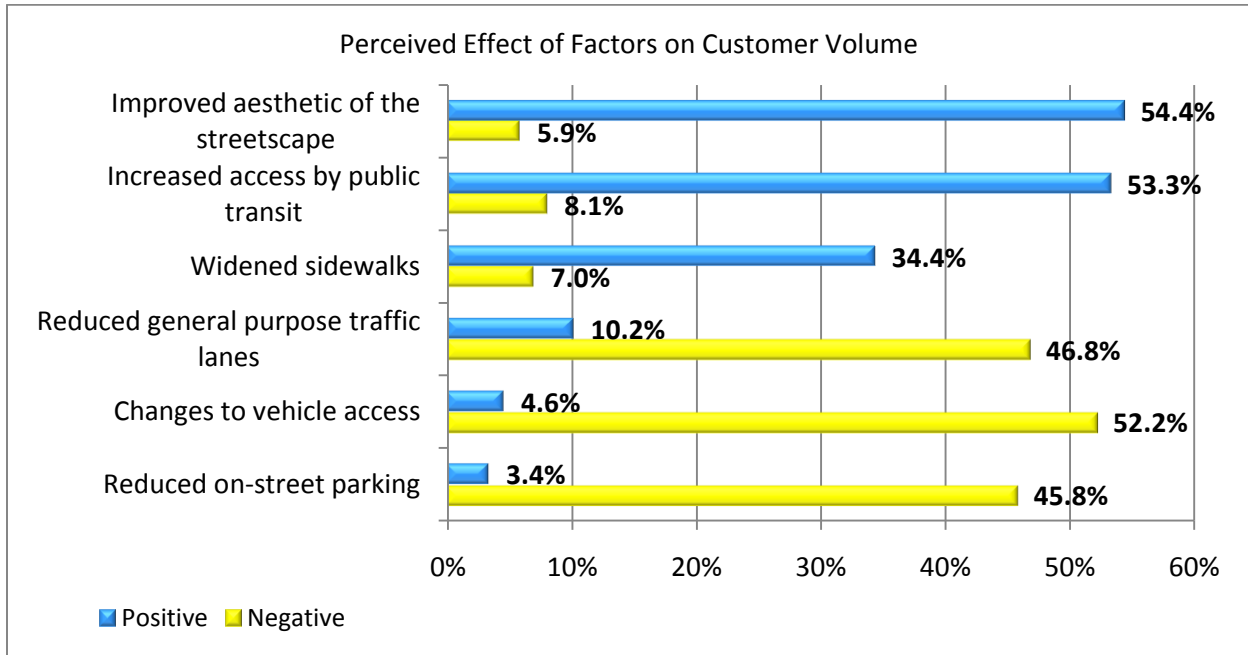
<b>COMMENT THEME</b>	<b>Number Mentioned</b>	<b>Percent Mentioned</b>
Ask city to change: parking/loading times, limits and/or fees	26	30%
Move/relocate; go out of business/change business strategy	21	24%
Encourage/use parking/loading on side streets, parkades, other	14	16%
Expand or build our own parking/loading, or use our back alleys	11	13%
Legal/political action	5	6%
Apply different delivery times/other (use of dollies)	5	6%
Buy/lease/use another off-site loading zone or a neighbour's	4	5%

Source: Business and Property Owner Survey, n=86

## 2.4 Perceived Effects of Rapid Transit on Businesses

Businesses were asked how various factors might affect the volume of customers visiting their business. The chart below summarizes the responses of businesses listed in order from most positive to least positive. Improved aesthetic to the streetscape and increased access by public transit were perceived to have the most positive effects on customer volume, whereas changes to vehicle access to on-site parking and reduced traffic lanes were perceived as having the most negative effect on customer volume.

**Chart 2.7: Overall Perceive Effects of Factors on Customer Volume**



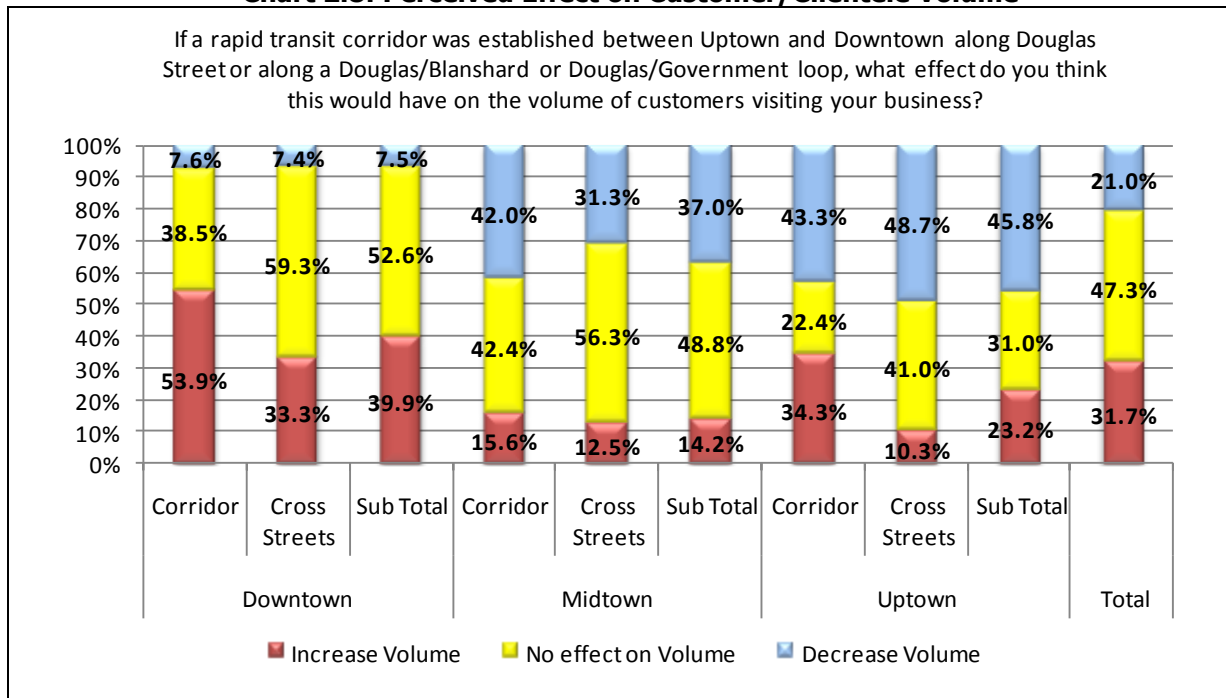
Source: Business Survey

The findings are discussed in further detail throughout this section.

### 2.4.1 Overall Effect of a Rapid Transit System on Volume of Customers/Cientele

Business owners were asked their perceptions about how the volume of their customers or clientele might be affected if a rapid transit corridor was established between uptown and downtown. Overall, 32% of all respondents reported that there would be an increase in customer volume, and an additional 47% reported that there would likely be no change. One-fifth (21%) reported that they believed the volume of customer traffic would decrease. There was some variation by region and corridor/cross-street, as illustrated in Chart 2.8.

**Chart 2.8: Perceived Effect on Customer/Cientele Volume**



Source: Business Survey, n=442

#### 2.4.2 Effects of Specific Outcomes of a Rapid Transit System

Respondents were asked about how specific potential outcomes related to the development of a rapid transit corridor might affect them. Businesses were asked how the outcomes might affect their business, and property owners were asked how they might affect their ability to rent/lease their property. Respondents were asked to respond with respect to the corridor street closest to their business on a scale of 1 to 5, where 1 is very negative and 5 is very positive. The outcomes included:

1. Potential reduced general purpose traffic lanes on Douglas, Blanshard, or Government;
2. Changes to vehicle access from Douglas, Blanshard, or Government to either on-site parking or loading;
3. Reduced availability of on-street parking on Douglas, Blanshard, or Government;
4. Increased accessibility to the business/property by public transit;
5. Improved aesthetics of the streetscape surrounding the business/property, and
6. Wider sidewalks in front of the business/property.

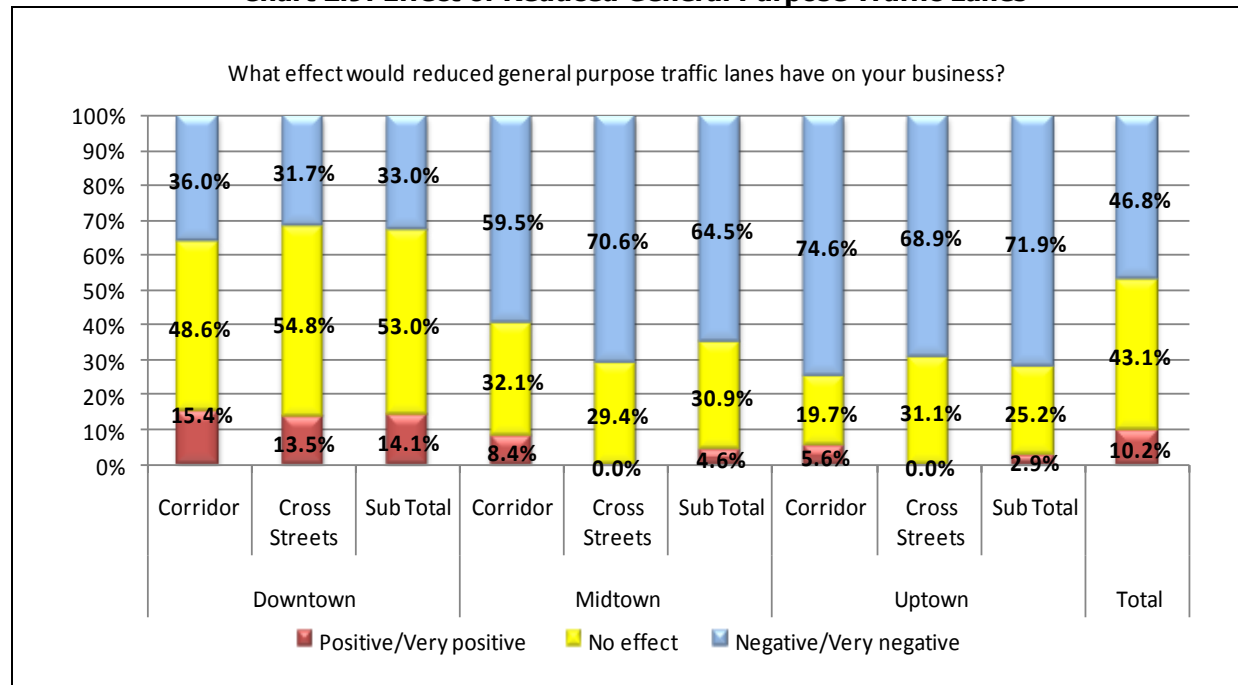
Generally, the first two potential outcomes discussed were more likely to be perceived as negative by respondents in the midtown and uptown, whereas the third outcome, reduced availability of on-street parking, was most likely to be perceived as negative by respondents in the midtown and downtown. Outcomes 4 through 6 were more likely to be perceived as positive by respondents in the downtown.

The differences in responses between respondents on the corridor streets and those on the cross streets are relatively small. Notable differences have been highlighted.

## Potential Reduction in General Purpose Traffic Lanes

Just under half of all respondents (47%) reported that reduced general purpose traffic lanes would have a negative effect on their business. When broken out by location, more pronounced variations in perception can be observed. The majority of respondents in the downtown (67%) reported that reduced traffic lanes would have either no effect (53%) or a positive effect (14%) on their business. As businesses move out of the downtown, respondents are more likely to perceive negative effects. Sixty-five percent of midtown respondents and 72% of uptown respondents perceive that a reduction in general purpose traffic lanes would have a negative effect on their business. The difference in opinion between respondents on the corridor and those on the cross-streets is slightly more pronounced within the midtown, with 71% of respondents on cross-streets and 60% on the corridor perceiving negative effects. Chart 2.9 below details the responses.

**Chart 2.9: Effect of Reduced General Purpose Traffic Lanes**

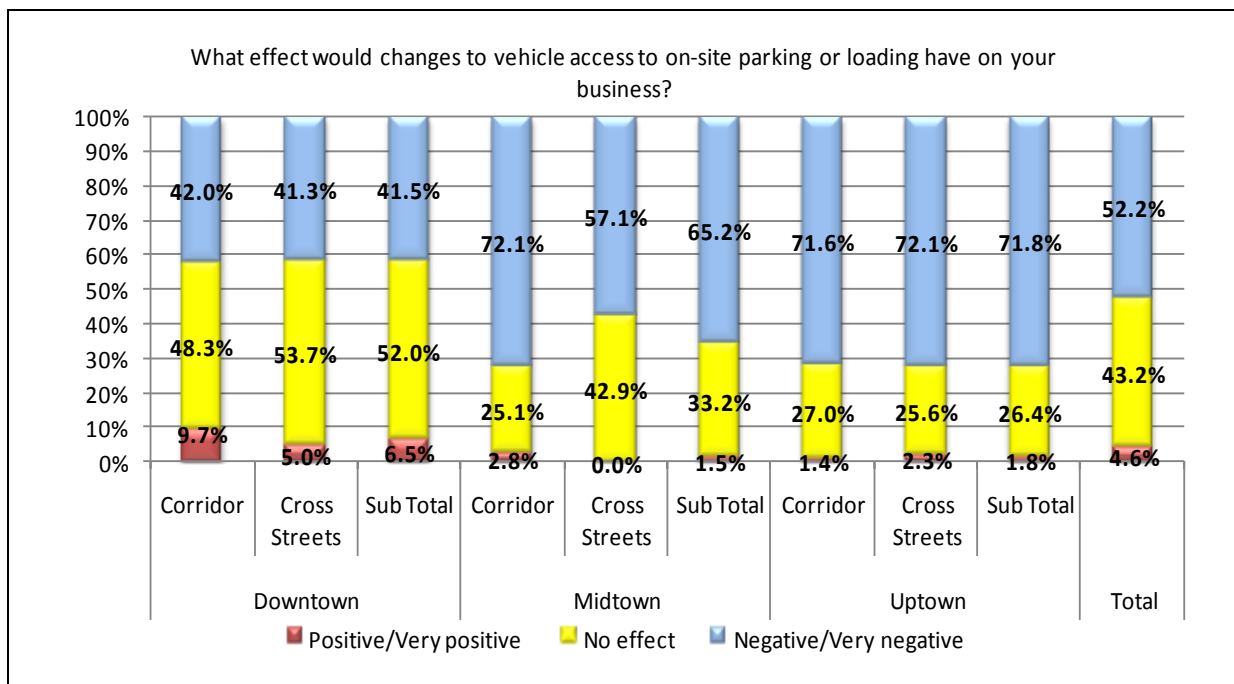


Source: Business and Property Owner Survey, n=485

## Changes to Vehicle Access to On-Site Parking and Loading

Businesses and property owners were asked about the potential effects that changes to vehicle access to on-site parking and loading might have if it were to occur. Chart 2.10 below shows that slightly more than half of all respondents (52%) reported that changes would have a negative effect on their business or their ability to rent/lease their property. The greatest proportion of perceived negative effects were reported by respondents in the midtown corridor and in the uptown (both corridor and cross street equally), each with 72% reporting negative effects. The largest proportion of downtown respondents reported no effect (52%). Reasons for this could be that businesses in the midtown and uptown may be more likely to have on-site loading and parking, as their lots may be bigger, as is reflected in Table 2.1 where respondents in the uptown report a much higher proportion of businesses in the large and very large classifications as based on square footage.

**Chart 2.10: Effect of Changes to Vehicle Access**

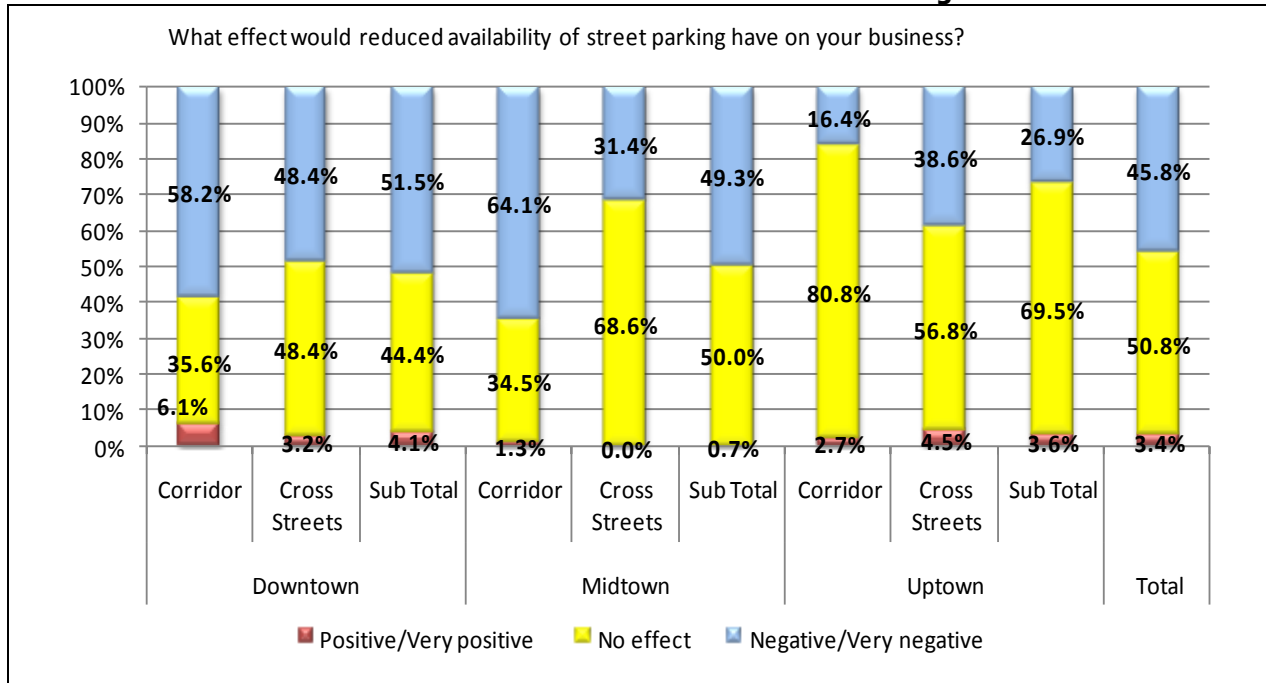


Source: Business and Property Owner Survey, n=491

## Effect of Reduced On-Street Parking

Slightly fewer than half (46%) of all respondents reported that a reduction in on-street parking would have a negative effect. The highest proportion of respondents, 51%, perceived that this would have no effect on their business or their ability to rent/lease their property.

**Chart 2.11: Effect of Reduced On-Street Parking**



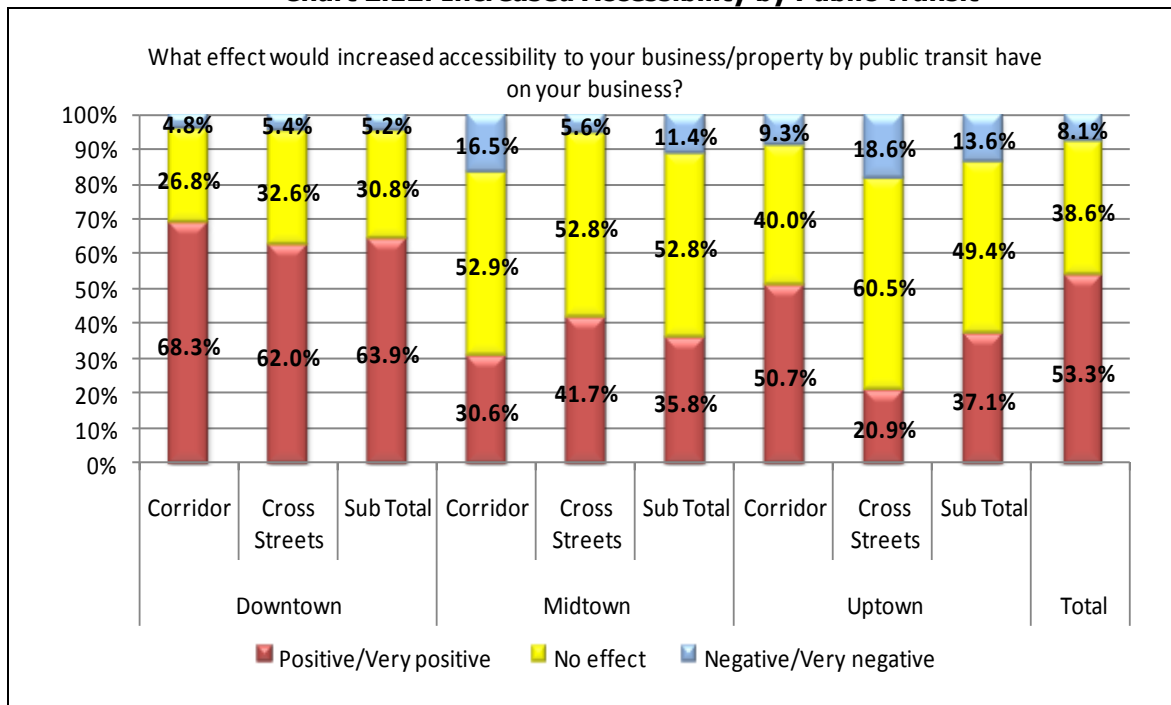
Source: Business and Property Owner Survey, n=496

Of the groups of respondents, those that responded most negatively to reduced on-street parking were: midtown corridor (64%), downtown corridor (58%), downtown cross streets (48%) and uptown cross streets (39%).

## Increased Accessibility by Public Transit

The majority of all respondents (54%) reported that increased accessibility to the business by public transit would have a positive effect on their business. Only 8% reported that this would have a negative effect. Respondents were not asked to specify how or why they perceive the effects, so their reasons for believing it would have a negative effect are unknown. Positive effects were perceived most by respondents in the downtown, with 64% reporting a likely positive effect, and an additional 31% reporting no effect. Very few differences are observed between the corridor and cross street respondents, with the exception of respondents in the uptown, where a higher proportion of respondents on the corridor perceive a positive effect (51% compared with 21%), and a lower proportion perceive a negative effect (9% compared with 19%). The responses are illustrated in Chart 2.12 below.

**Chart 2.12: Increased Accessibility by Public Transit**

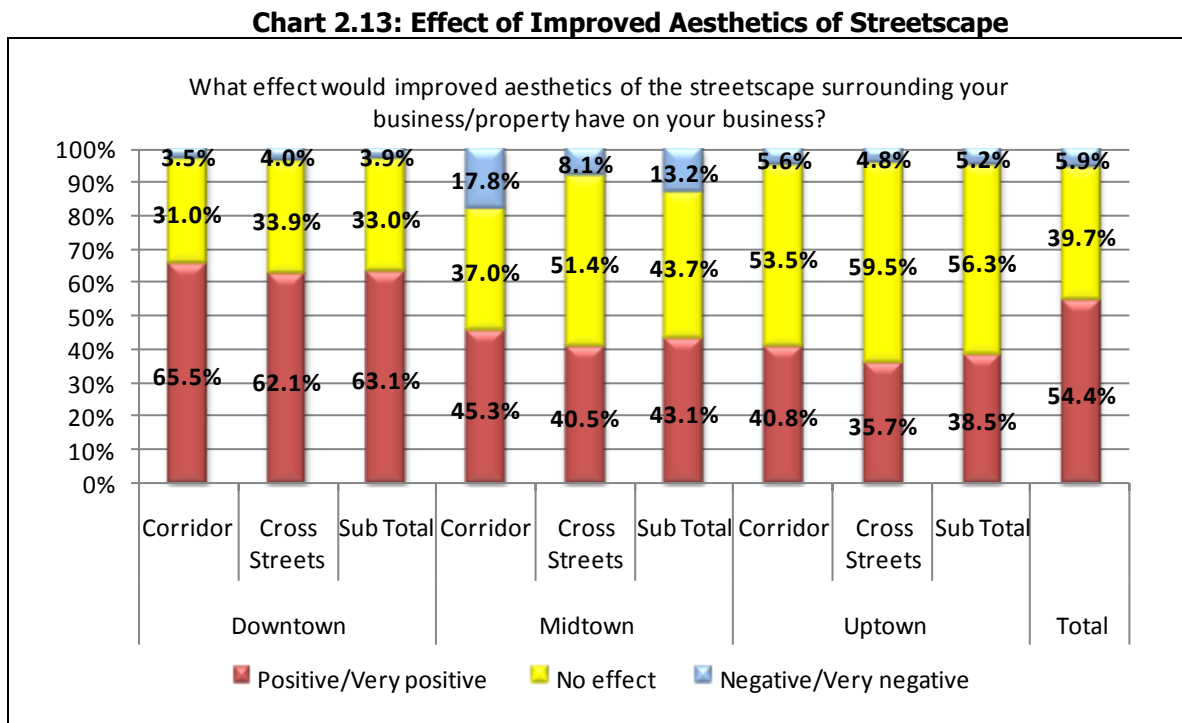


Source: Business and Property Owner Survey, n=500

## Improved Aesthetics of the Streetscape

The majority of all respondents (54%) reported that improved aesthetics of the streetscape surrounding their business or property would likely have a positive effect on their business and an additional 40% reported it would have no effect. Six percent of respondents reported that an improved aesthetic of the streetscape would have a negative effect on their business. Again, respondents were not asked to qualify their responses, so their reasons for believing it would have a negative effect are unknown.

According to survey findings, respondents in the downtown are more likely to perceive a positive effect as a result of improved aesthetics, with 63% reporting this, followed by 43% of midtown respondents, and 39% of uptown respondents. As illustrated in chart 2.13 below, very little difference can be observed between the corridor and cross streets in all three locations.

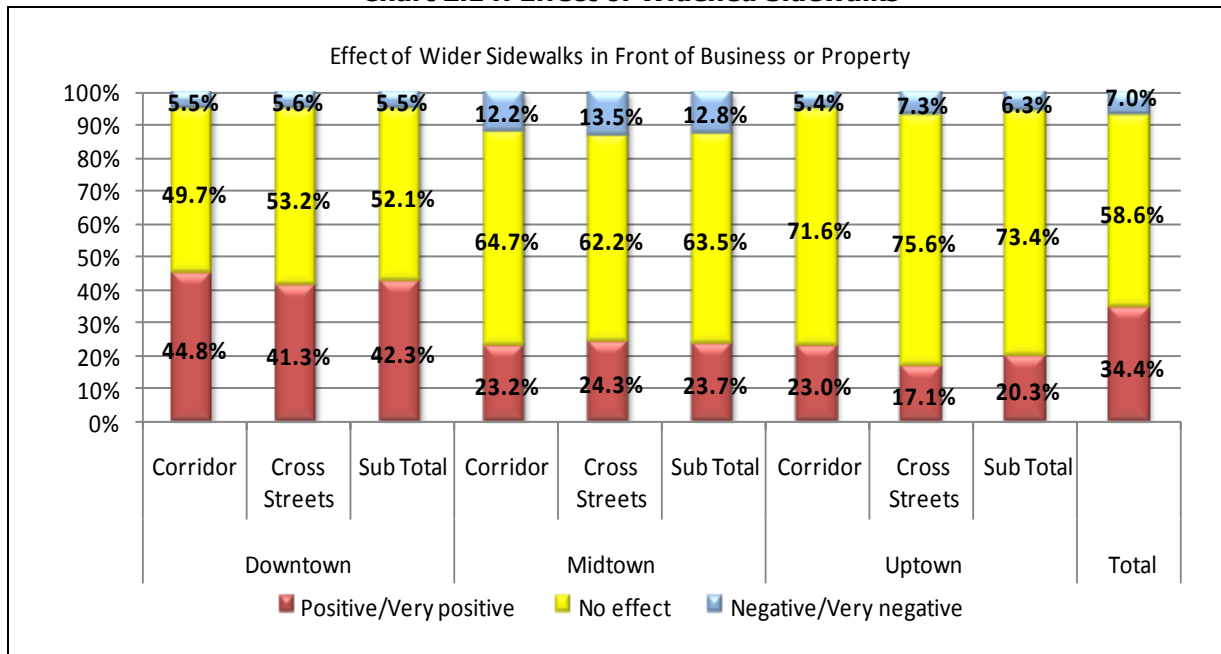


Source: Business and Property Owner Survey, n=490

## Wider Sidewalks

Similar to the perceived effects of improved aesthetics, as businesses move out from the downtown they are less likely to perceive a positive effect from widened sidewalks. Among downtown respondents, 42% perceive positive effects, whereas in the midtown only 24% perceived positive effects. In the uptown, this proportion was even lower, at 20%. Overall, the majority of respondents perceive no effect (59%), and an additional 34% perceive a positive effect. Seven percent perceive a negative effect, with the highest proportion being in the midtown area (13%). Responses are presented in Chart 2.14 below.

**Chart 2.14: Effect of Widened Sidewalks**

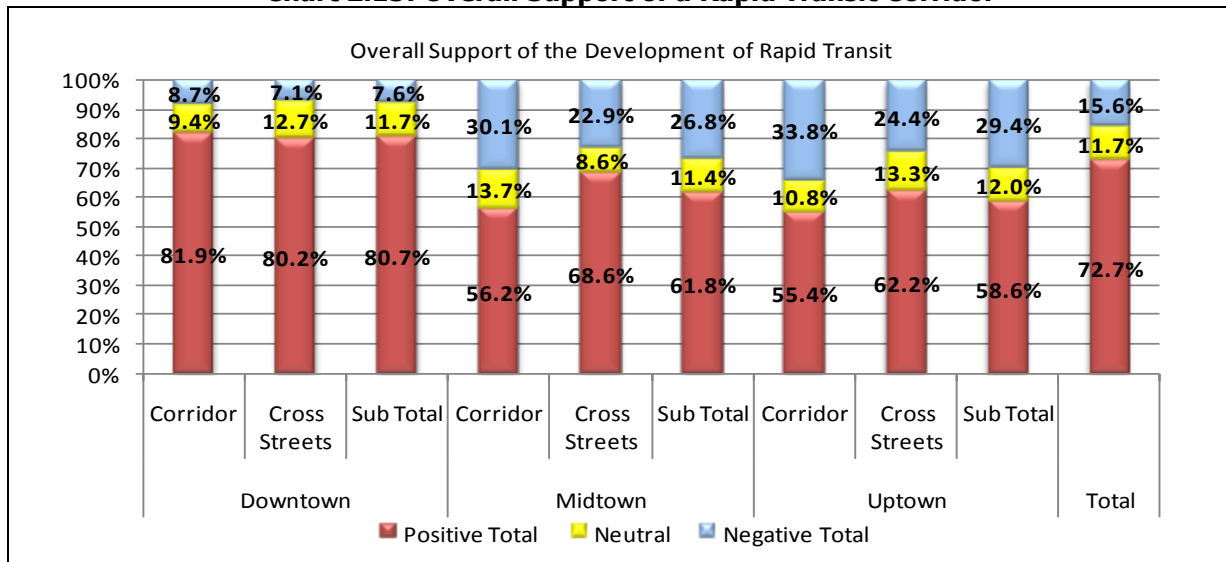


Source: Business and Property Owner Survey, n=497

## 2.5 Overall Business Support of a Rapid Transit System

Business and property owners were asked about their overall support of a rapid transit corridor to connect the West Shore Communities and reduce greenhouse gases. In total, 73% of respondents were supportive. Downtown businesses were most supportive, at 81%, followed by the midtown (62%), and the uptown (59%). A very slight difference can be observed between the corridor and the cross streets in the midtown and the uptown, where respondents on the cross streets appear to be slightly more supportive than respondents on the corridor. Chart 2.15 below summarizes the responses.

**Chart 2.15: Overall Support of a Rapid Transit Corridor**



Source: Business and Property Owner Survey, n=503

As presented in Table 2.12, when broken out by business type, businesses classified as professional services, other (including financial), business services, and food and beverage are most supportive. Those businesses that are less likely to be supportive are in 'retail', 'wholesale', 'manufacturing', 'transportation and warehousing', and 'personal services'.

**Table 2.12: Supportiveness by Business Classification**

	Supportive	Neutral	Unsupportive
Professional Services	82.0%	5.0%	13.0%
Other	77.5%	11.2%	11.2%
Business Services	72.2%	14.4%	13.3%
Food and Beverage	70.2%	12.8%	17.0%
Retail	65.4%	12.3%	22.3%
Wholesale, Manufacturing, Transportation and Warehousing	64.7%	17.6%	17.6%
Personal Services	60.7%	17.9%	21.4%

Source: Business Survey, n=499

Businesses and property owners were given the opportunity to provide final comments. Only 290 respondents provided a final comment. Comments were reviewed and grouped according to theme. Caution should be taken when considering these comments because they do not represent the overall sentiments of all respondents; they only represent the sentiments of those who chose to comment further. Table 2.13 below summarizes the themes, and the number of comments per theme. The percentages are based only on those who provided a comment rather than on the entire respondent sample. Several comments were grouped into more than one theme. For example, if a respondent mentioned that they support rapid transit if it is light rail, and only if it is on Blanshard not Douglas, this comment would be counted in each of these themes. However, if a respondent only said they support a Blanshard route, and did not specify that they oppose a Douglas route, the comment was only included in the "support Blanshard" theme. Similarly, if a respondent only reported that they oppose a Douglas route and did not specify supporting another route, they were only counted once in the "oppose Douglas" theme.

**Table 2.13: Open Ended Comments – Businesses/Property Owners**

<b>COMMENT THEME</b>	<b># Mentioned</b>	<b>% Mentioned</b>
Good/positive; overall supportive, good for business, positive	165	57%
Concerned about reduced parking/loading, or access including	52	18%
Opposed; overall opposed, negative effects	26	9%
Support Blanshard	20	7%
Opposed to Douglas	19	7%
Light rail/no buses	19	7%
Concerned with increased taxes/cost	15	5%
E&N; underground; above ground; ferries	13	4%
Neutral – not much concern or effect	12	4%
Concerned with traffic	12	4%
Concerned about construction phase/minimize impact of construction	9	3%
Opposed to Government	8	3%
Need information/communication from BC Transit	6	2%
Other	6	2%
Concerned about location of bus stops	5	2%
Needs to run long hours, including night service	5	2%
Support Douglas	4	1%
Needs to be clean, safe, no loitering	3	1%
<b>TOTAL</b>	<b>290</b>	<b>n/a</b>

Source: Business and Property Owner Survey, n=290

Note: Percentages sum to greater than 100% due to multiple responses.

## SECTION 3: PERCEPTIONS OF CUSTOMERS

### 3.1 Customer Demographics

#### 3.1.1 Age of Customers/Clientele and Mode of Transportation Used

At the outset of the survey, respondents were asked for demographic information, including respondent age and employment status, and mode of transportation used to access the business/area. As detailed in Table 3.1, the largest proportion (48%) of respondents were over the age of 50, while one in five (22%) were under the age of 30. The median age range of all respondents was 40-49. The downtown visitors who were surveyed were more likely to be younger, with over one-quarter (26%) under the age of 30, as compared to midtown (15% under 30) and uptown (17% under 30).

**Table 3.1: Age of Respondents**

Location	16-19	20-29	30-39	40-49	50-64	65+
Downtown	3.8%	22.6%	11.5%	14.5%	29.9%	17.5%
Midtown	0.0%	14.5%	14.5%	24.2%	40.3%	6.5%
Uptown	1.4%	15.8%	13.7%	20.5%	30.8%	17.8%
<b>TOTAL</b>	<b>2.5%</b>	<b>19.2%</b>	<b>12.7%</b>	<b>17.9%</b>	<b>31.7%</b>	<b>16.1%</b>

Source: Customer Survey, n=442

With respect to employment status as presented in Table 3.2, more than half (54%) of respondents were currently employed. Just under one-quarter (24%) were retired, 8% were students, and 9% were currently not working. Visitors to the midtown were more likely to be employed (71%) than visitors to the downtown and uptown (26% and 25%, respectively).

**Table 3.2: Employment Category**

Location	Employed	Retired	Student	Not working/ not looking	Other	Looking for work
Downtown	49.6%	25.6%	10.3%	5.1%	4.3%	3.0%
Midtown	71.0%	14.5%	6.5%	1.6%	3.2%	3.2%
Uptown	52.7%	24.7%	6.2%	8.2%	4.1%	3.4%
<b>TOTAL</b>	<b>53.6%</b>	<b>23.8%</b>	<b>8.4%</b>	<b>5.7%</b>	<b>4.1%</b>	<b>3.2%</b>

Source: Customer Survey, n=436

Overall, 37% of customer respondents reported that they drove and parked a car to get to the area or business. Public transit and walking were the next most common modes used at 27% and 24% respectively. The majority of visitors to uptown drove and parked a car (61%), while only 20% of downtown visitors drove to the area. Fewer than one in ten (8%) visitors walked to the uptown businesses, while the same number rode a bike. Visitors in the downtown area

were much more likely to have walked (36%) or used public transit (32%) to get to the area or business. Table 3.3 below provides more detail on the mode of transportation used by respondents to the customer survey.

**Table 3.3: Mode of Transportation Used**

Location	Car (parked)	Public transit	Walk	Bike	Car (dropped off)	Taxi	Motor cycle	Other (please specify)
Downtown	20.3%	31.6%	35.9%	4.8%	2.6%	1.3%	0.4%	3.0%
Midtown	40.3%	27.4%	16.1%	14.5%	0.0%	0.0%	0.0%	1.6%
Uptown	61.0%	19.2%	7.5%	7.5%	1.4%	0.0%	0.0%	3.4%
<b>TOTAL</b>	<b>36.7%</b>	<b>26.9%</b>	<b>23.7%</b>	<b>7.1%</b>	<b>1.8%</b>	<b>0.7%</b>	<b>0.2%</b>	<b>3.0%</b>

Source: Customer Survey, n=439

Of the approximately 37% of respondents who drove and parked, additional information on where they parked was obtained as presented on table 3.4. Responses varied by location. The vast majority of uptown visitors (82%) who drove used a parking lot associated with the business, while only 8% of downtown respondents said the same. Most downtown visitors used a parkade (46%), and the majority of midtown visitors who drove either used a parking lot associated with the business (36%) or parked on the street in front of the business (36%).

**Table 3.4: Parking Location (of those who drove)**

Location	Parking lot associated with the business	Parkade/pay parking lot	On-street in front of the business	Parking lot associated with another business	On this street a few blocks away	On another street	Other (please specify)
Downtown	8.3%	45.8%	2.1%	8.3%	22.9%	6.3%	6.3%
Midtown	36.0%	12.0%	36.0%	4.0%	8.0%	0.0%	4.0%
Uptown	81.5%	0.0%	6.5%	9.8%	0.0%	1.1%	1.1%
<b>TOTAL</b>	<b>53.3%</b>	<b>15.2%</b>	<b>9.7%</b>	<b>8.5%</b>	<b>7.9%</b>	<b>2.4%</b>	<b>3.0%</b>

Source: Customer Survey, n=165

### 3.1.2 Geographic Origin and Reasons for Visiting

In regards to respondents' reasons for visiting the business/area, visitors were first asked whether their visit was planned as a destination or was an on impulse or stop of convenience. Table 3.5 presents the results. Three in five (62%) respondents stated that their visit was planned. However, downtown visitors were least likely to indicate that their visit was planned (57%); and uptown visitors were most likely to state that it was planned (68%).

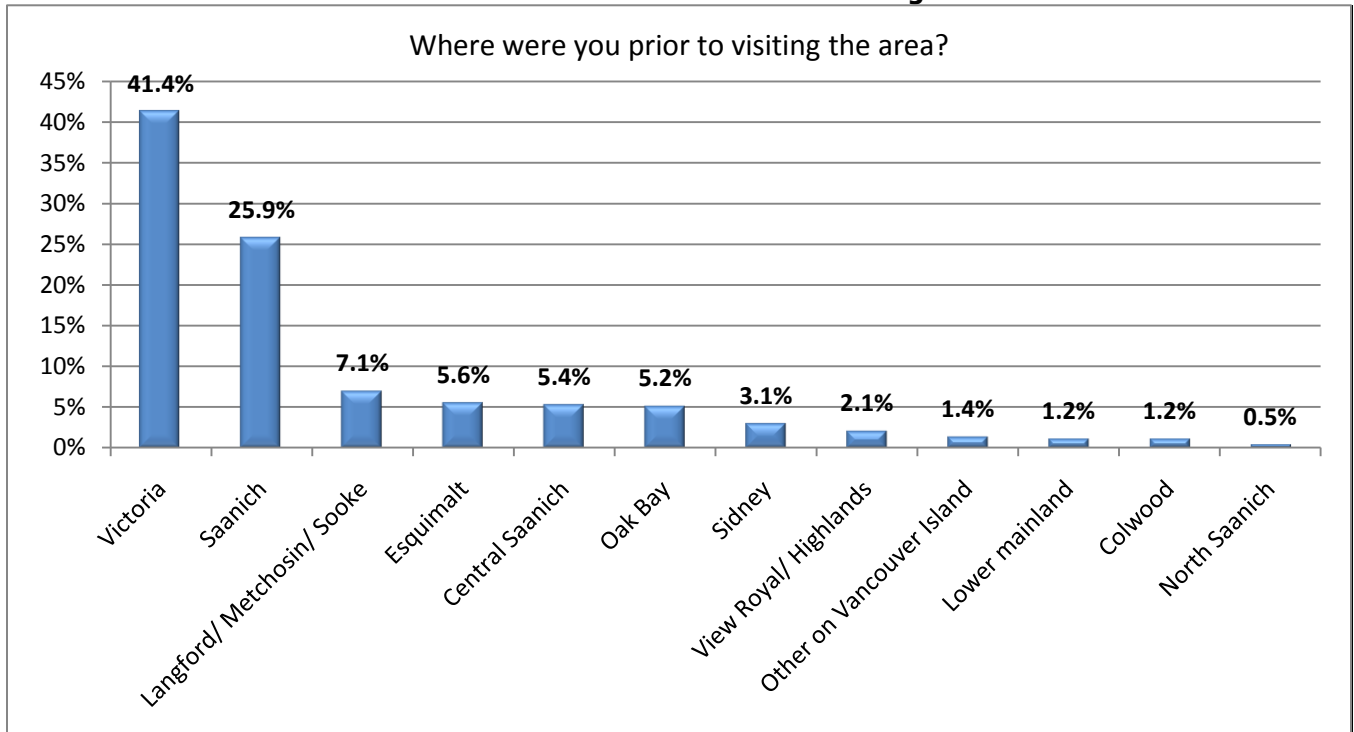
**Table 3.5: If Visit was Planned**

Location	Planned (i.e. a destination)	Impulse (i.e. stop of convenience)
Downtown	57.3%	42.7%
Midtown	62.3%	37.7%
Uptown	67.8%	32.2%
<b>TOTAL</b>	<b>61.5%</b>	<b>38.5%</b>

Source: Customer Survey, n=439

The largest proportion of visitors (41%) came from Victoria proper prior to visiting the business area, while just over one-quarter (26%) came from Saanich, and 7% came from Langford. The remaining visitors had come from smaller townships or districts within the capital region such as Oak Bay and Esquimalt, or from outlying regions, such as Sidney, Central Saanich or the Lower Mainland. Chart 3.1 below presents the results.

**Chart 3.1: Where Visitors Came From Prior to Visiting Business**



Source: Customer Survey, n=436

Table 3.6 presents the results for why customers visited the business. When asked for the top three reasons why customers chose to visit the business in particular, just over half (54%) stated it was specifically for the business products and/or services; the highest proportion of these were in the midtown (63%). Between 10% and 15% of respondents cited reasons such as:

- the business is easily accessible by foot (15%);
- it is close to their work (13%); or
- that it is close to their home (12%).

Downtown visitors were far more likely (23%) to state that they chose to visit that particular business because it was easily accessible by foot, while midtown visitors were more likely to indicate their choice was because the business was close to their work. 'Other' responses included reasons such as stop of convenience, social (meeting friends), or picking someone up.

**Table 3.6: Reason for Visiting the Business**

Location	Specifically for products /services	Easily accessible by foot	Close to work	Close to home	Vibrant location/area	Easily accessible by car	Availability of parking	Close to bus stop	Other (please specify)
Downtown	51.7%	22.6%	13.2%	11.5%	6.8%	0.4%	0.0%	2.1%	16.7%
Midtown	62.9%	3.2%	22.6%	4.8%	3.2%	4.8%	1.6%	1.6%	14.5%
Uptown	54.8%	8.2%	7.5%	14.4%	6.2%	12.3%	6.2%	2.7%	15.1%
<b>TOTAL</b>	<b>54.3%</b>	<b>15.2%</b>	<b>12.7%</b>	<b>11.5%</b>	<b>6.1%</b>	<b>5.0%</b>	<b>2.3%</b>	<b>2.3%</b>	<b>15.8%</b>

Source: Customer Survey, n=442

Note: Percentages sum to greater than %100 due to multiple responses. The response "close to bus stop" was not an option originally provided, but was mentioned as 'other' by several respondents, and therefore coded into a separate category.

### 3.2 Frequency and Likely Times to Visit the Area

Respondents were then asked a series of questions pertaining to their frequency of visiting the area, and the times they are most likely to visit. As presented in Table 3.7, the majority of respondents (58%) indicated that they visit the area at least once per week, with more than one-quarter (26%) stating that they visit daily or between 4-6 times per week. Uptown visitors were less likely to indicate that they go to the area every day (13%), and more likely to state that they visit 1-3 times per week (33%) or 1-3 times per month (30%). The downtown visitors were most likely to indicate that they visit the area frequently, with two-thirds (66%) stating that they visit the area more than once a week.

**Table 3.7: Frequency of Visits**

Location	Daily, or 4-6 times per week	1-3 times per week	1-3 times per month	6-11 times per year	1-5 times per year	Once a year, or very rarely
Downtown	32.1%	32.9%	10.7%	4.3%	3.4%	16.7%
Midtown	30.6%	29.0%	21.0%	9.7%	6.5%	3.2%
Uptown	13.1%	33.1%	29.7%	5.5%	12.4%	6.2%
<b>TOTAL</b>	<b>25.6%</b>	<b>32.5%</b>	<b>18.4%</b>	<b>5.4%</b>	<b>6.8%</b>	<b>11.3%</b>

Source: Customer Survey, n=441

Table 3.8 presents customer responses when asked about the time of day they are most likely to visit the business, mid-afternoon was the most common time (26%) followed by mid-morning (21%). Mid-evening (2%) and late evening (1%) were the least common times. Although the visitation patterns were fairly consistent across the three areas, a couple results stood apart. For example, midtown visitors were more likely to visit in the early morning, and downtown visitors were more likely to visit in the early afternoon. However, almost one out of every five respondents (19%) reported that there was no specific time of day that they'd be most likely to visit.

**Table 3.8: Time of Day Most Likely to Visit**

Location	Early morning (before 9:30)	Mid-morning (9:30 to 11)	Late morning (11-12)	Early afternoon (12-1:30)	Mid-afternoon (1:30-3:30)	Late afternoon (3:30-5)	Early evening (5-6:30)	Mid-evening (6:30-7:30)	Late evening (after 7:30)	Any time/ No specific time
Downtown	5.7%	20.4%	10.0%	20.4%	23.5%	12.2%	5.7%	0.4%	1.7%	20.4%
Midtown	16.1%	21.0%	9.7%	9.7%	25.8%	9.7%	8.1%	1.6%	3.2%	19.4%
Uptown	4.1%	22.8%	5.5%	13.8%	29.0%	11.0%	5.5%	3.4%	0.0%	17.2%
<b>TOTAL</b>	<b>6.6%</b>	<b>21.3%</b>	<b>8.5%</b>	<b>16.7%</b>	<b>25.6%</b>	<b>11.4%</b>	<b>5.9%</b>	<b>1.6%</b>	<b>1.4%</b>	<b>19.2%</b>

Note: respondents were permitted to select up to two time periods

Source: Customer Survey, n=437

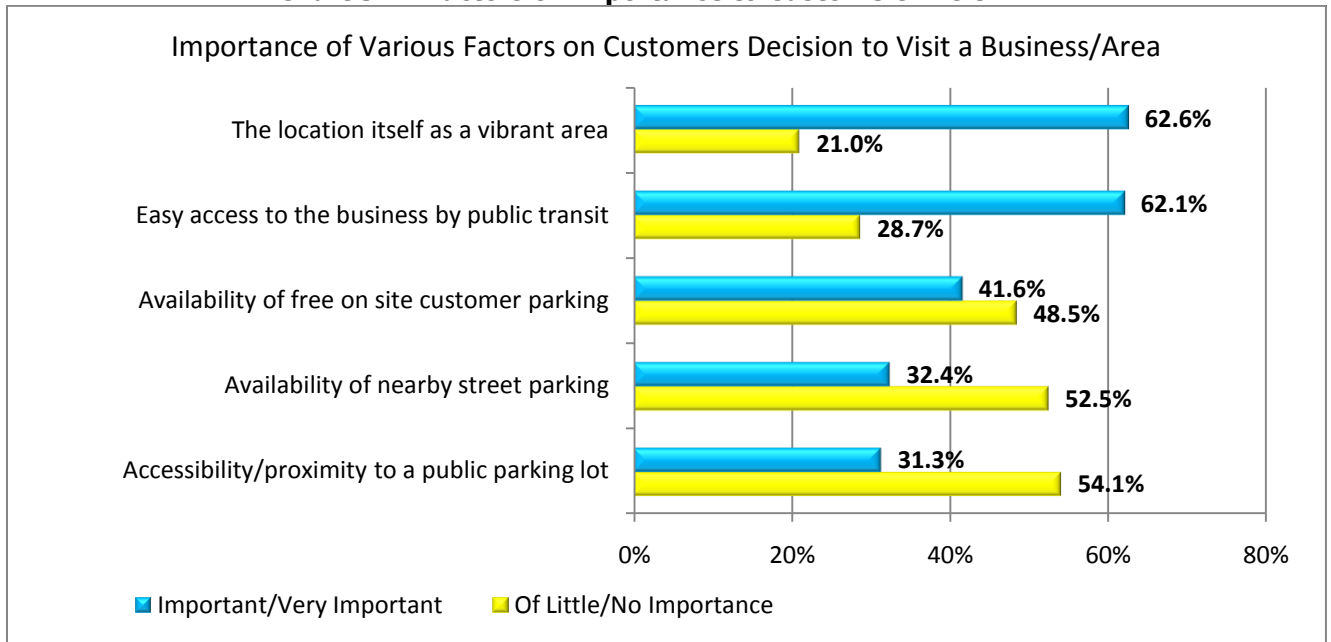
### 3.3 Factors that Affect Customers' Decision to Visit an Area or Business

Customers were asked how various factors would affect their decision to visit an area or business. Respondents were asked about the importance of the following five factors:

- Availability of free on site customer parking;
- Availability of nearby street parking;
- Accessibility/proximity to a public parking lot;
- Easy access to the business by public transit; and
- The location itself as a vibrant area.

Chart 3.2 summarizes their responses based on order of importance.

**Chart 3.2: Factors of Importance to Customers' Visit**

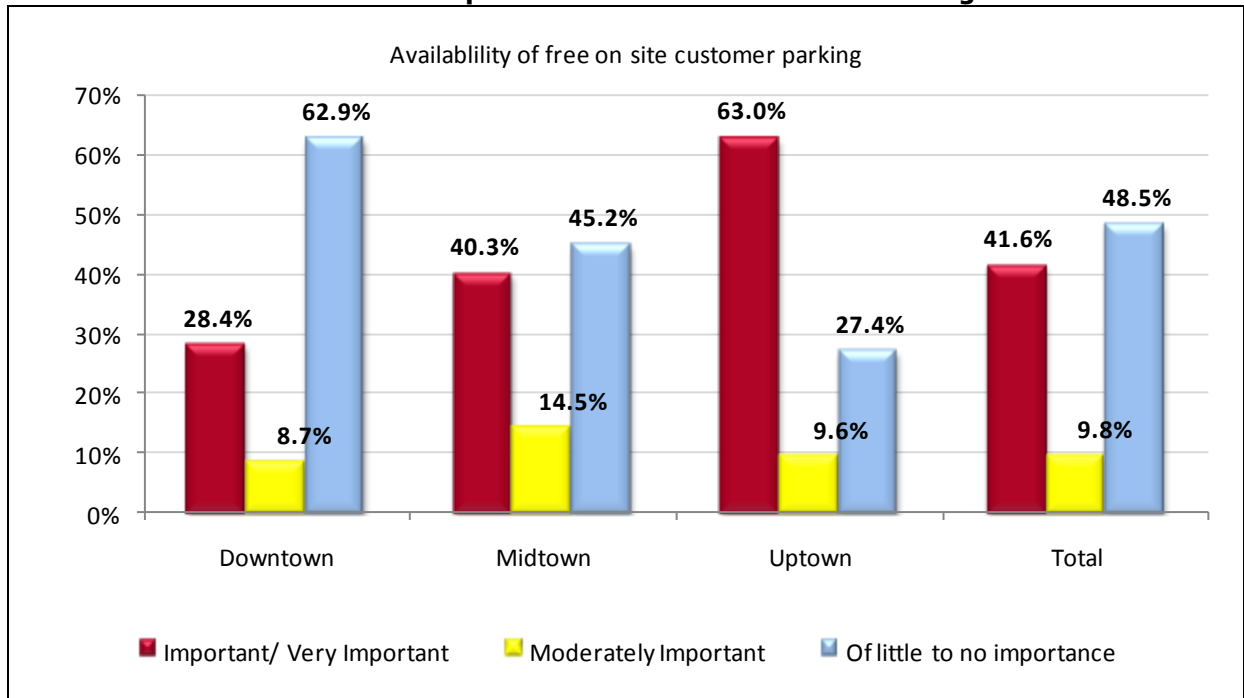


Source: Customer Survey, n=434-438

As discussed in greater detail below, the aspect that was most likely to influence a customer's decision to visit a business/area was the location itself being a vibrant area, with nearly four-fifths of the respondents stating that it is an important, very important or moderately important factor. Easy access to the area by public transit was the next most common factor, with 70% indicating that it is important, very important or moderately important. The factor cited least frequently in the decision to visit a business/area was its accessibility/proximity to a public parking lot; less than half (46%) of the respondents indicated that it was a very or moderately important factor in their decision to visit the area.

Chart 3.3 summarizes customer responses with respect to the importance of on-site customer parking. Close to half of all customers (49%) reported it was of little or no importance, and the remaining 51% reported it was either very important, important, or moderately important. Visitors in the uptown area placed the most importance on on-site customer parking, with 73% stating that it is a very or moderately important aspect, followed by midtown visitors (55%). Downtown respondents were least likely to indicate that the availability of on-site parking is important, with just over one-third (37%) stating that it is a factor of some degree of importance.

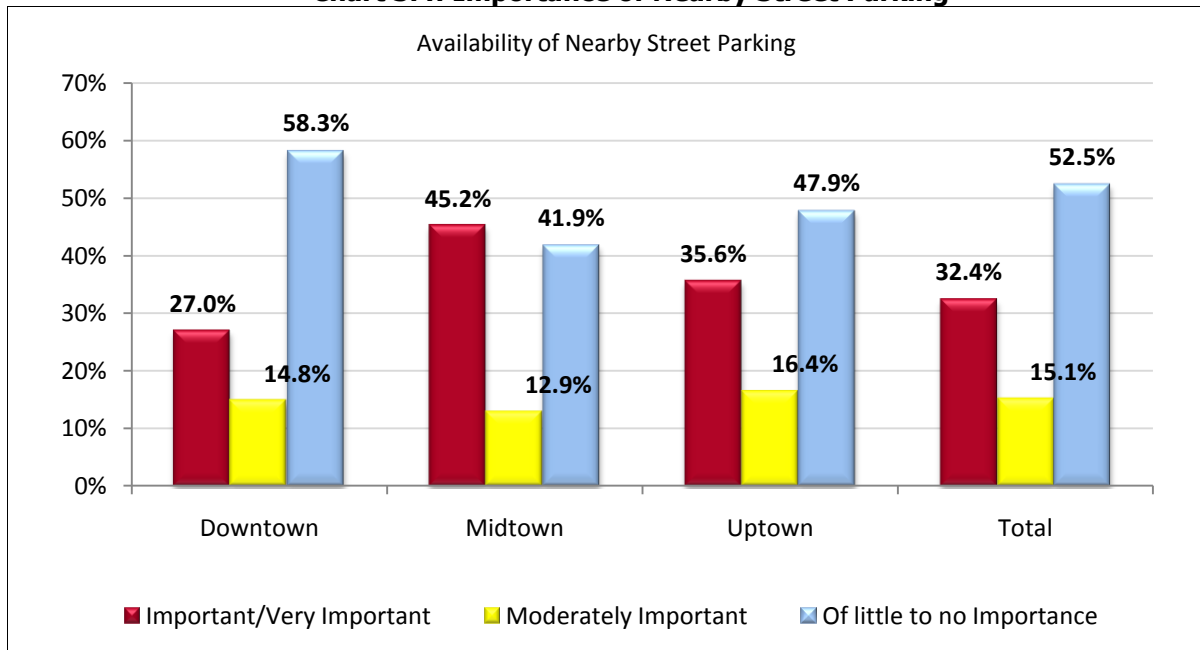
**Chart 3.3: Importance of On-Site Customer Parking**



Source: Customer Survey, n=437

A comparable number of respondents across all groups indicated that the availability of nearby street parking is not an important factor, with just over half (53%) stating that it is of little to no importance. The remaining 47% reported that nearby street parking was important to some degree in regards to their decision to visit the business/area, as shown in Chart 3.4. However, the availability of nearby street parking is most important to midtown visitors, with 58% indicating that it is a very or moderately important factor; 45% of whom stated it is a very important aspect, followed by the uptown visitors, where just over half (52%) indicated it is an important factor (either very important, important, or moderately important). The downtown respondents were again least likely to state that the availability of nearby street parking is important; 27% indicated it is an important or very important factor in their decision to visit the business/area.

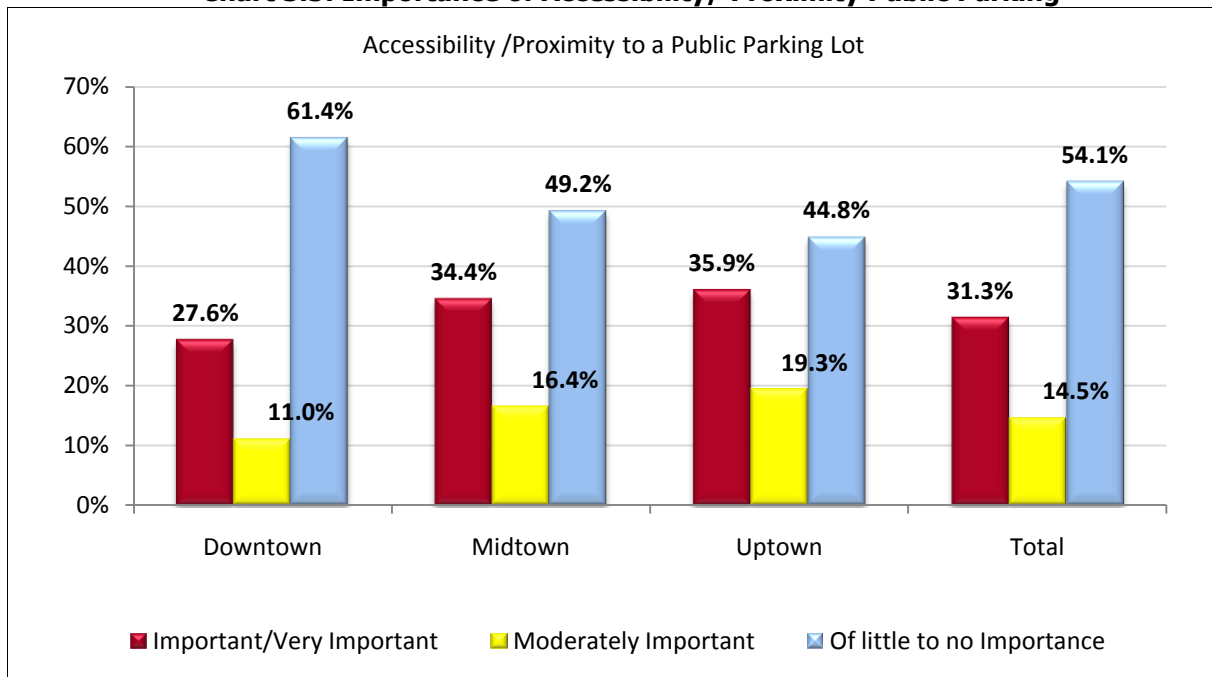
**Chart 3.4: Importance of Nearby Street Parking**



Source: Customer Survey, n=438

As illustrated in Chart 3.5, the importance of a business' proximity to public parking was perceived as important by close to half of respondents (important/very important 31%, moderately important 15%), while just over half did not see it as important (of little/no importance 54%). Uptown visitors were slightly more likely to indicate that it plays a role in their decision, with 55% of respondents stating that accessibility/proximity to a public parking lot is an important factor to some degree, followed by midtown visitors (51%). Downtown visitors were least likely to indicate that it plays a role in their decision, with just under two in five respondents (39%) stating that it is an important, very important, or moderately important factor.

**Chart 3.5: Importance of Accessibility/ Proximity Public Parking**

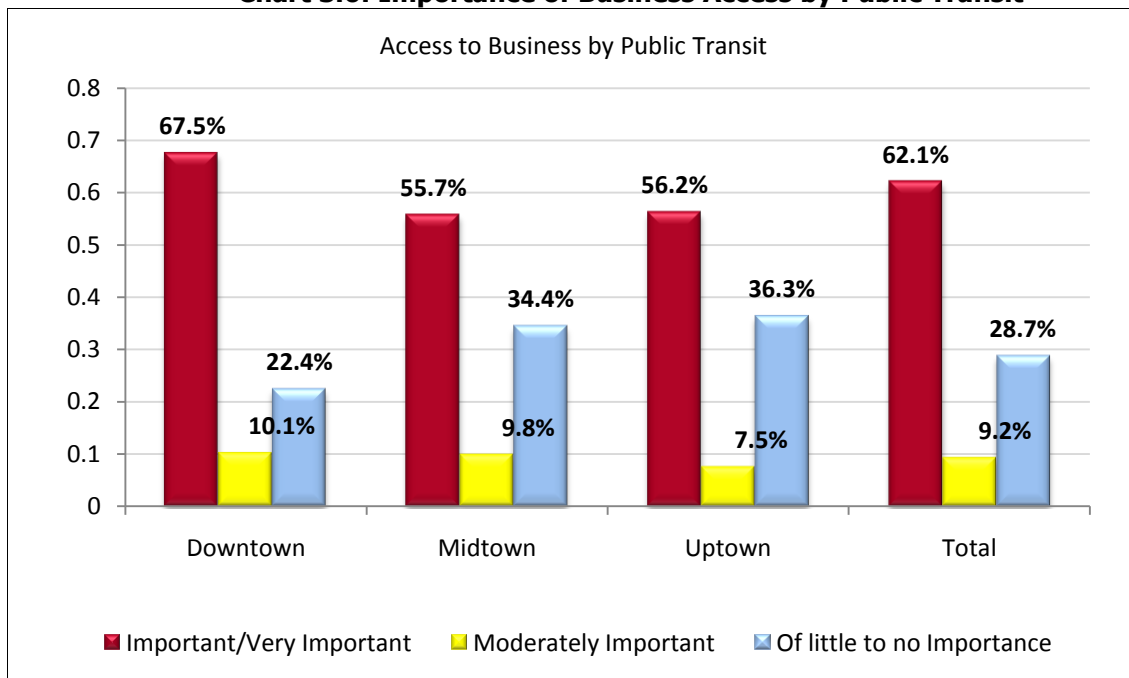


Source: Customer Survey, n=434

Chart 3.6 summarized customer responses with respect to the accessibility of the business by public transit. The majority (71%) of all respondents indicated that it is a very or moderately important factor in their decision to visit a business or area. Downtown visitors were most likely to state that it is an important, very or moderately important factor, at 78%. Most midtown and uptown visitors also reported that accessibility by public transit was important, very important or moderately important, at 66% and 64% respectively. Additionally, it should be noted that whereas 47% of customers reported that nearby street parking was important, very important or moderately important, 71% reported that access by public transit was important (important, very important or moderately important).

Of note, overall, only 27% of survey respondents used public transit to get to the area or business. Another 24% walked (and of these it is not known what percentage used public transit to get to a prior destination before their visit to the business, while 37% drove. It may be that the high level of importance assigned by customers extends beyond their own personal use to the importance they place on public transit accessibility in general, although no specific questions were asked, or survey results obtained that would necessarily confirm or disprove this.

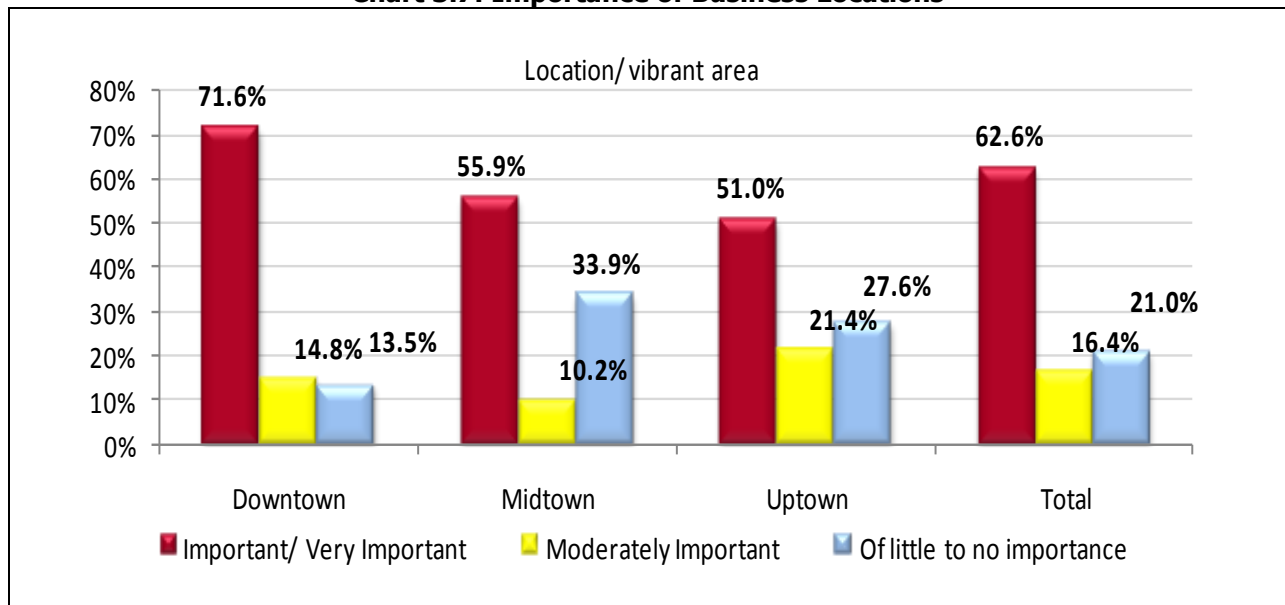
**Chart 3.6: Importance of Business Access by Public Transit**



Source: Customer Survey, n=435

Downtown visitors were much more likely to state that the vibrant location of the area is an important factor which influences their decision to visit compared to midtown or uptown visitors. Nearly nine in ten (86%) downtown visitors indicated that it is a very or moderately important factor. Two-thirds (66%) of midtown visitors expressed that the location itself as a vibrant area is a very or moderately important factor, while nearly three-quarters (72%) of uptown visitors indicated that it is a very or moderately important aspect of the decision to visit the area. As presented on Chart 3.7 below, across the whole group, nearly 8 in 10 (79%) respondents stated that the location as a vibrant area is a very or moderately important factor in their decision to visit.

**Chart 3.7: Importance of Business Locations**



Source: Customer Survey, n=433

### 3.4 Potential Impact of Rapid Transit on Customers

#### Customer Likelihood of Using Rapid Transit

Visitors to all three areas were provided the following description of rapid transit:

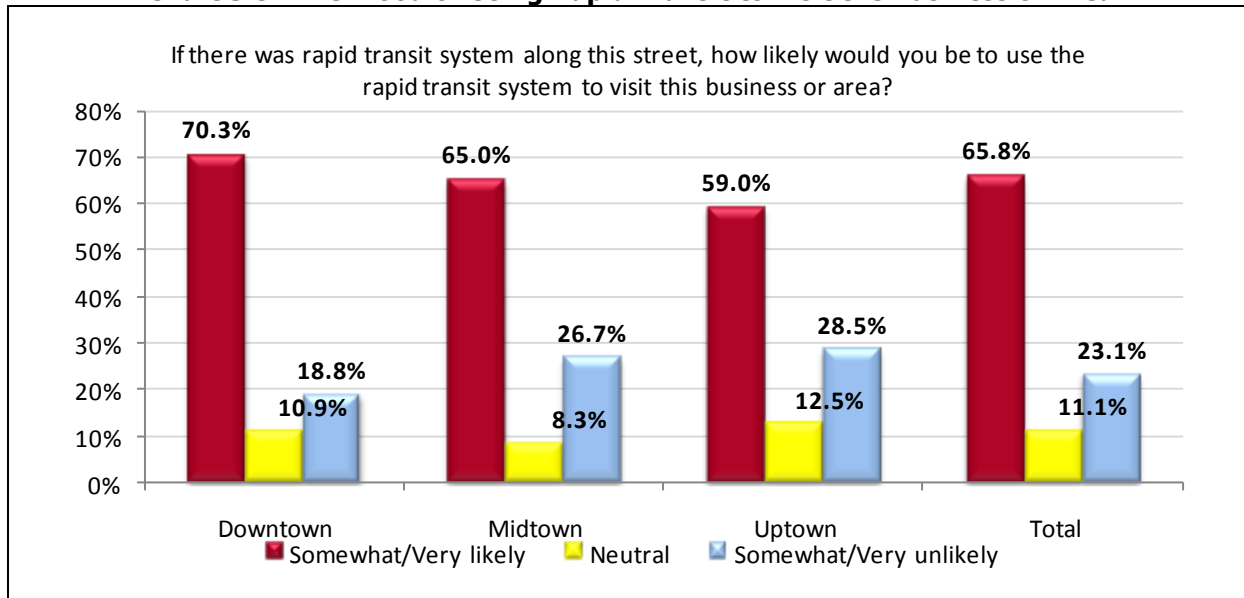
Rapid transit provides high-frequency (every 10 minutes or less) service all day, everyday, on exclusive dedicated lanes and usually uses light rail or accordion buses. They usually have fewer stops than regular buses, and do not have to compete with local traffic.

They were then asked how likely they would be to use the rapid transit system to visit the business or area if it existed along this street. As presented in Chart 3.8, overall two-thirds (66%) indicated that they would be somewhat or very likely to use the system. This strong positive reaction may be tempered somewhat by consideration of the fact that respondents were provided with only a brief description of the proposed rapid transit system, and, depending on their prior location before visiting the business where they were surveyed, it might not be

practical for all respondents to use the proposed corridor for their specific visit. Users of the results are therefore cautioned that responses cannot necessarily be taken as a direct predictor of actual behaviours once actual routes and schedules are known. Nevertheless, the results show a good deal of openness amongst respondents to using a rapid transit system.

The survey data were examined to rule out the possibility that such high levels of adoption envisioned by respondents was due to over-representation of existing transit users amongst the customer survey sample: Existing transit users were in the minority of survey respondents (27%, refer to table 3.4). Furthermore, looking at car drivers who represent 37% of the survey sample, 58% indicated that they would be somewhat or very likely to use the system (interest was highest amongst transit users, with 84% indicating that they would be likely to use the system). Again, it is important to remember that these reactions to a short description of rapid transit would not necessarily translate into actual behaviours.

**Chart 3.8: Likelihood of Using Rapid Transit to Visit the Business or Area**



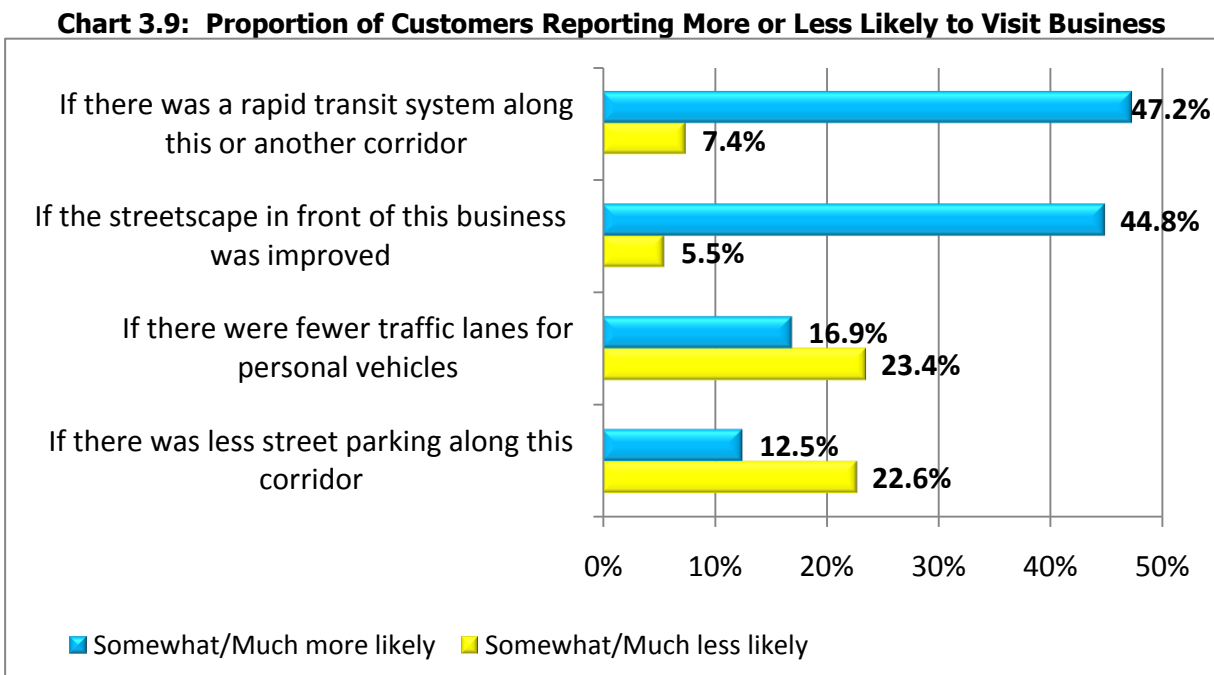
Source: Customer Survey, n=432

## Factors Influencing Likelihood of Visiting the Business or Area

Finally, the respondents were asked about a series of possible factors which could affect their likelihood of visiting the business/area. On a scale of 1 to 5, where 1 was much less likely and 5 was much more likely, the visitors were asked to rate the following potential situations:

1. if there was a rapid transit system along this or another corridor;
2. if there was less street parking along this corridor;
3. if there were fewer traffic lanes for personal vehicles; and
4. if the streetscape in front of this business was improved (wider sidewalks, green space, etc).

Chart 3.9 summarizes the responses.



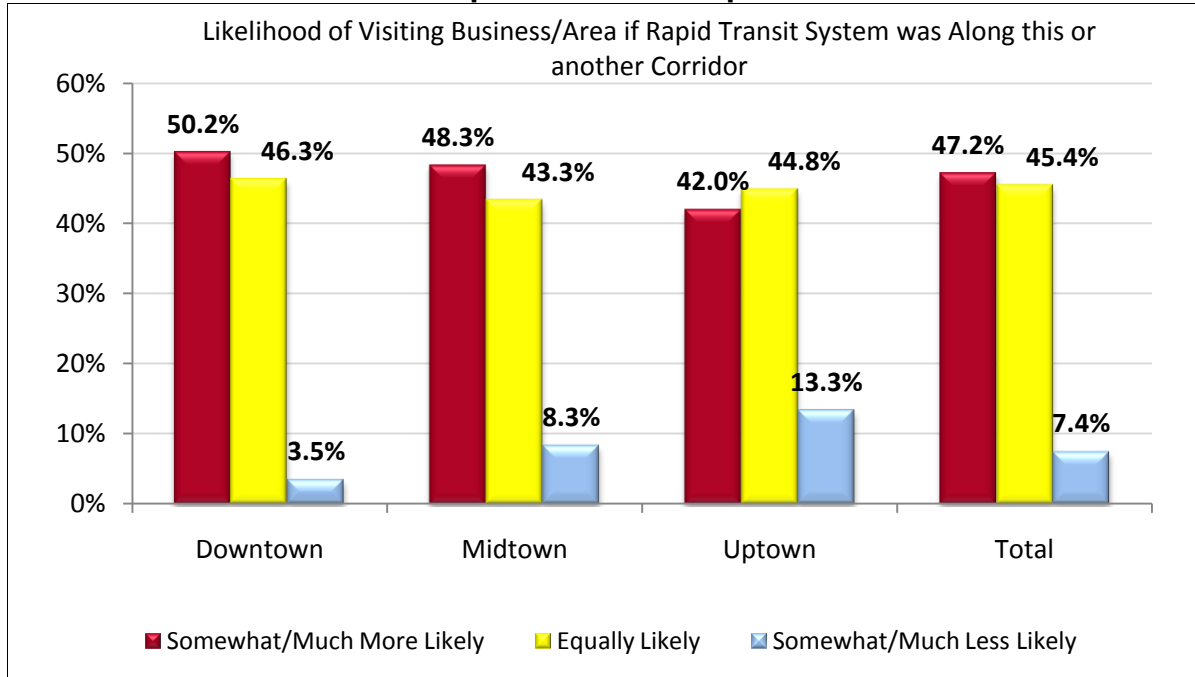
Source: Customer Survey, n=427-433

Overall, the factors that led the greatest proportion of respondents to state that they would be more likely to visit an area were:

1. if there was a rapid transit system along the corridor (47% more likely to visit) and
2. if the streetscape was improved (45% more likely to visit).

Downtown visitors were most apt to indicate that they would be more likely to visit the area if there was a rapid transit system (50%), while just over 4 in 10 (45%) of uptown visitors indicated the same. Nearly half (48%) of midtown visitors expressed that they would be more likely to visit the area if there was a rapid transit system along the corridor. Chart 3.10 summarizes the responses by location.

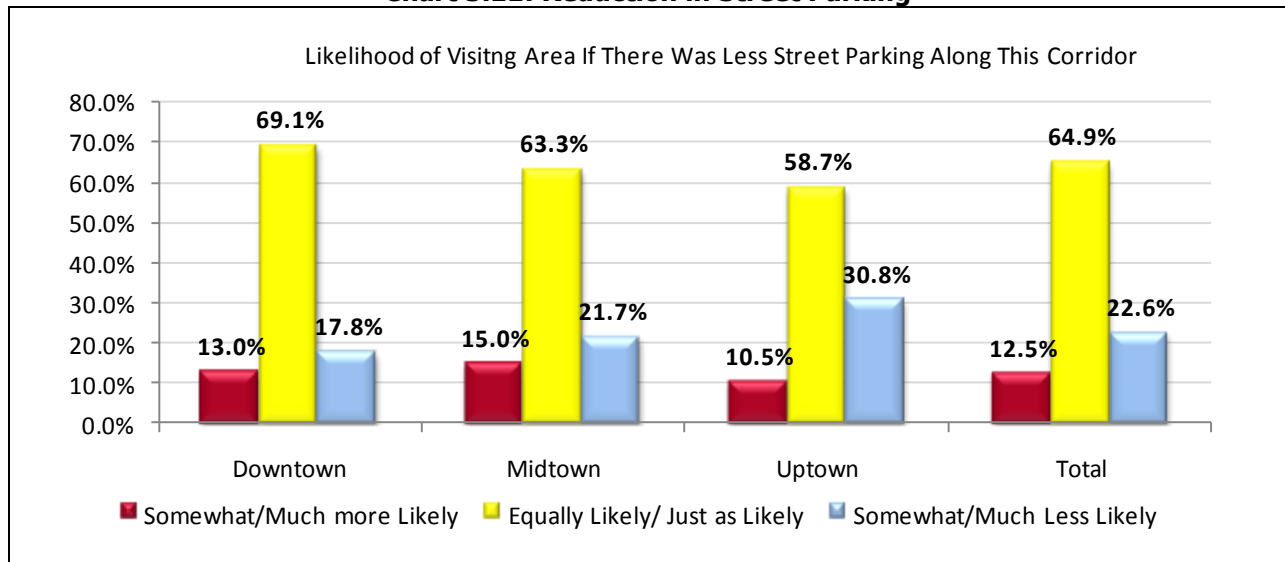
**Chart 3.10: Perceived Effect of Implementation of Rapid Transit Corridor on Customer Visits**



Source: Customer Survey, n=432

According to customer respondents, a possible reduction of street parking would not affect the majority of respondents' decision to visit the area or business (65%). However, while 13% reported they would be more likely to visit if there was less street parking, 23% indicated that they would be somewhat or very unlikely to visit the business/area if there was less street parking available along the corridor. Uptown visitors were the most likely to indicate that it would deter them from visiting; three in ten (31%) uptown respondents stated that they would be less likely to visit the area if there was less street parking. Just over two in ten (22%) midtown visitors stated that they would be less likely to visit, while 18% of downtown visitors indicated that it would be factor that would deter them from visiting the area. Chart 3.11 below summarizes the responses.

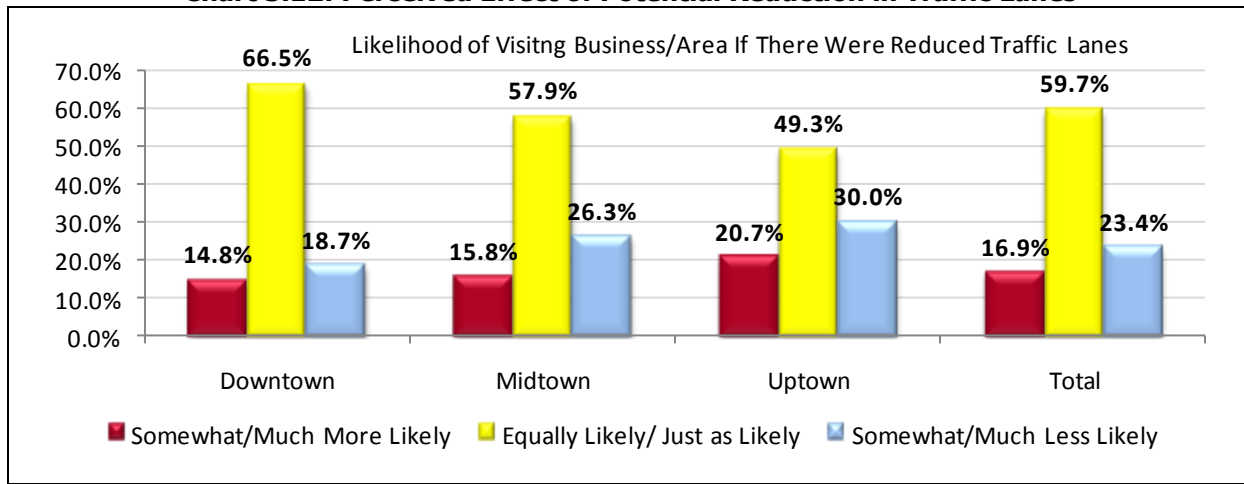
**Chart 3.11: Reduction in Street Parking**



Source: Customer Survey, n=433

When asked if they would be more or less likely to visit the area if there were fewer traffic lanes for personal vehicles, 60% reported that they would be equally likely, and an additional 17% would be more likely, while almost one-quarter (23%) of the respondents stated that they would be less likely to visit. Uptown visitors were again most likely to indicate that it would negatively affect their inclination to visit, with 30% stating that they would be less likely to visit the area. Just over one-quarter (27%) of midtown visitors and 19% of downtown visitors indicated that it would deter them from visiting the area. Responses are presented in Chart 3.12 below.

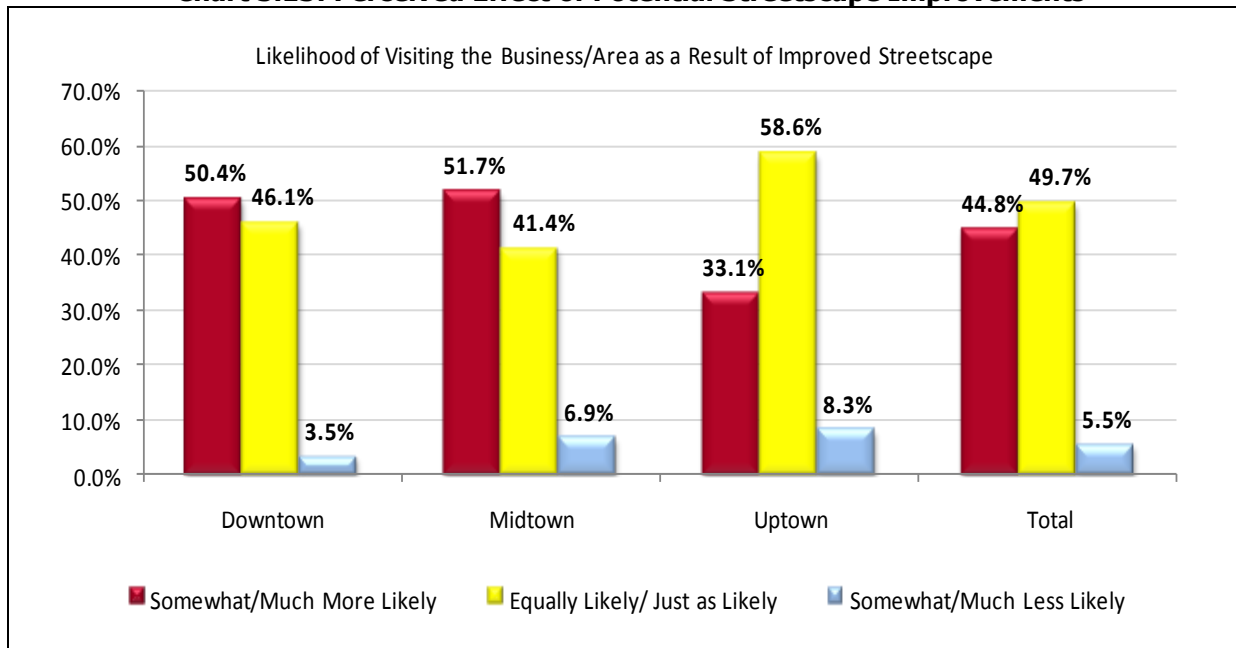
**Chart 3.12: Perceived Effect of Potential Reduction in Traffic Lanes**



Source: Customer Survey, n=427

As shown in Chart 3.13, respondents largely indicated that if the streetscape in front of the business or in the area was improved, they would be more likely to visit the area; 45% indicated more likely as compared to 6% less likely. While over half of midtown (52%) and downtown (50%) visitors indicated that they would be more likely to visit the area if the streetscape was improved, only one-third (33%) of uptown visitors said the same, with most (59%) stating that it would not affect their visitation of the area.

**Chart 3.13: Perceived Effect of Potential Streetscape Improvements**

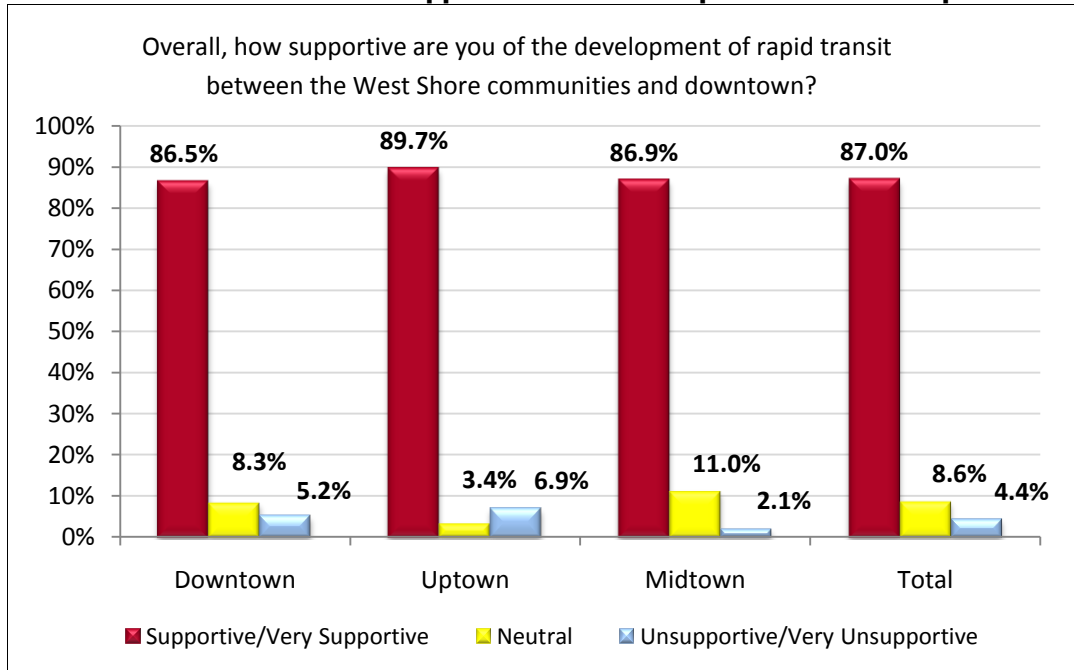


Source: Customer Survey, n=433

### 3.5 Overall Customer Support of Rapid Transit

At the conclusion of the survey, respondents were asked to rate their support for the development of a rapid transit system between the West Shore communities and downtown as a way to meet transportation demand and reduce greenhouse gases. Visitors to all areas were extremely supportive of the idea of a rapid transit system, with nearly nine in ten (87%) of all respondents stating that they were supportive or very supportive, as indicated in Chart 3.14.

**Chart 3.14: Supportiveness of a Rapid Transit Development**



Source: Customer Survey, n=432

Several final comments were consistently made by a number of the respondents. When asked if they had any additional feedback, well over half (66%) of the respondents indicated that the proposed rapid transit system is a good idea and/or that they would support/use it. Just over one-quarter (28%) made a comment regarding the potential hours of service, connections and fares. The table below summarizes the comments by theme. Readers are cautioned that these do not represent all respondents, but only those who felt compelled to provide final comments. The comments are summarized by theme in Table 3.9.

**Table 3.9: General Comments**

<b>Comment Theme</b>	<b>No. of Respondents Who Commented</b>	<b>% of Respondents Who Commented</b>
Good idea/supportive/would use it/ is green	169	66%
Comments on hours/connection/fares	71	28%
LRT/no buses	19	7%
Comments on construction phase/change in landscape	10	4%
Comments on current system	9	3%
No effect	9	3%
Other	9	3%
Opposed/ unsupportive	8	3%
Concerns with bikes	7	3%
Concern with increased traffic, reduced parking	6	2%
Oppose Government	6	2%
E&N	2	1%
Support Blanshard	1	0%

Source: Customer Survey, n=253

## **SECTION 4: KEY FINDINGS: COMPARISON OF BUSINESS AND CUSTOMER PERCEPTIONS**

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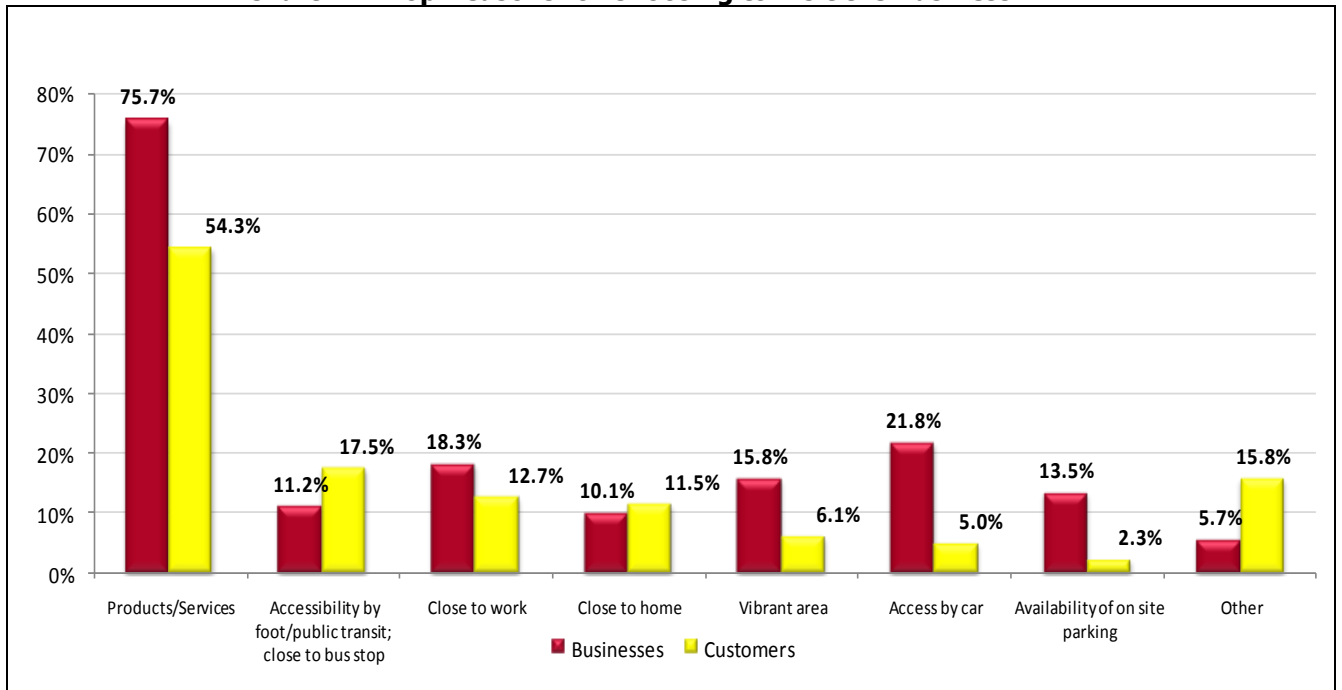
This section of the report provides a comparison of the business and property owner survey findings with the customer survey findings. The purpose is to identify divergent views on the effects of a rapid transit system on businesses and customer traffic, and to help in the identification and development of accommodating or mitigating strategies if necessary.

The main issues of interest where comparisons are drawn relate to:

- Reason for visiting the business
- Effect of rapid transit on customer volume;
- Customer reliance on on-street parking;
- Effects of reduced traffic lanes on customer volume;
- Perceived effects of improved aesthetics on business and customer visits;
- Overall support of rapid transit; and
- General comments related to developing a rapid transit corridor.

Businesses reported that approximately 82% of customer visits were planned. According to the customer survey, 62% reported that their visit to the business was planned. Both customers and businesses were asked about the main reason that customers choose to visit. Respondents were allowed to select up to three responses. The majority of both businesses and customers reported that the main reason for the visit was specifically for the products and/or services offered by the business. However, businesses placed a greater emphasis on the availability of parking as a reason for customer visits than did customers themselves. Refer to tables 2.8 and 3.6. Chart 4.1 below provides a comparison of the responses.

**Chart 4.1: Top Reasons for Choosing to Visit the Business**



Source: Business Survey, n=495 and Customer Survey, n=442

Note: Percentages sum to greater than 100% due to multiple responses; businesses were not provided the response option of "accessible by foot"; customer responses for "accessible by foot" (15.2%) and "close to the bus stop" (2.3%) have been combined for reporting in this table.

#### **4.1 Business and Customer Volume**

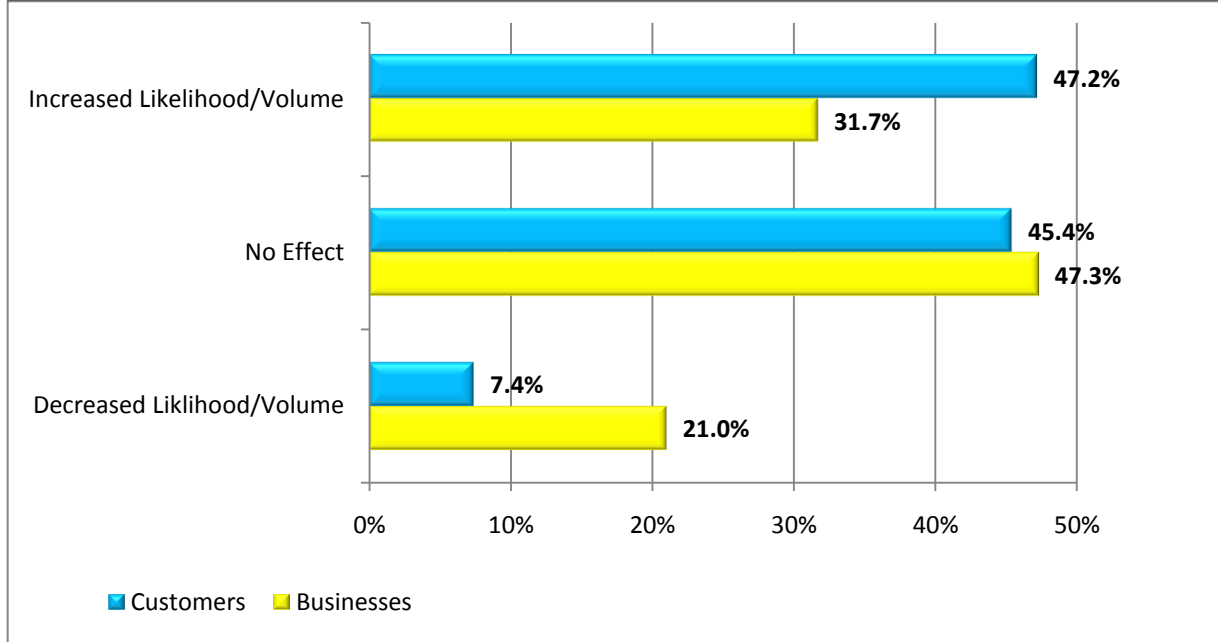
One of the key issues of concern among businesses is how a rapid transit corridor might affect the volume of customers visiting their business. Businesses were asked what effects they perceive a rapid transit corridor would have on the volume of customers visiting their business, and customers were asked about how their likelihood of visiting the business or area might be affected if a rapid transit corridor were developed.

A comparison of the responses suggests that businesses and property owners are more likely than customers to perceive a decrease in customer volume as a result of developing a rapid transit system. Conversely, customers reported a higher likelihood of visiting the area or business if a rapid transit corridor was developed, than perceived by businesses. The differences are rather pronounced. Where 21% of businesses perceive that customer volume will decrease, only 7% of customers report that they would be less likely to visit. The differences are more pronounced as respondents move toward uptown. However, the most notable difference exists among midtown (between Herald Street and Hillside Avenue) respondents. While only 14% of midtown businesses report that rapid transit would increase the volume of customer traffic, 48% of customers surveyed in the midtown area said they would be more likely to visit the business or area if there was a rapid transit corridor.

Chart 4.2 illustrates the overall responses of businesses and customers.

Table 4.1 below summarizes the responses of both businesses and customers by strata with respect to the volume and likelihood of visits if a rapid transit corridor was developed.

**Chart 4.2: Overall Perceived Effect of a Rapid Transit Corridor on Customer Volume/Visits**



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

**Table 4.1: Perceived Effect of a Rapid Transit Corridor on Customer Volume/Visits**

	Increased Volume/Increased Likelihood		Decreased Volume/Decreased Likelihood	
	Business	Customer	Business	Customer
Downtown	39.9%	50.2%	7.5%	3.5%
Midtown	14.2%	48.3%	37.0%	8.3%
Uptown	23.2%	42.0%	45.8%	13.3%
<b>TOTAL</b>	<b>31.7%</b>	<b>47.2%</b>	<b>21.0%</b>	<b>7.4%</b>

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

## 4.2 Customer Reliance on On-Street Parking

One of the potential outcomes of developing a rapid transit system is a reduction in the number of on-street parking spaces. As discussed in Section 2, businesses in the downtown report a higher reliance on on-street parking and on public parkades to meet their customers' parking needs, and are less likely to have their own on-site parking lots. As such, they were slightly more likely than the other two groups to perceive negative effects on their business as a result of reduced on-street parking. Interestingly, however, businesses in the downtown were also

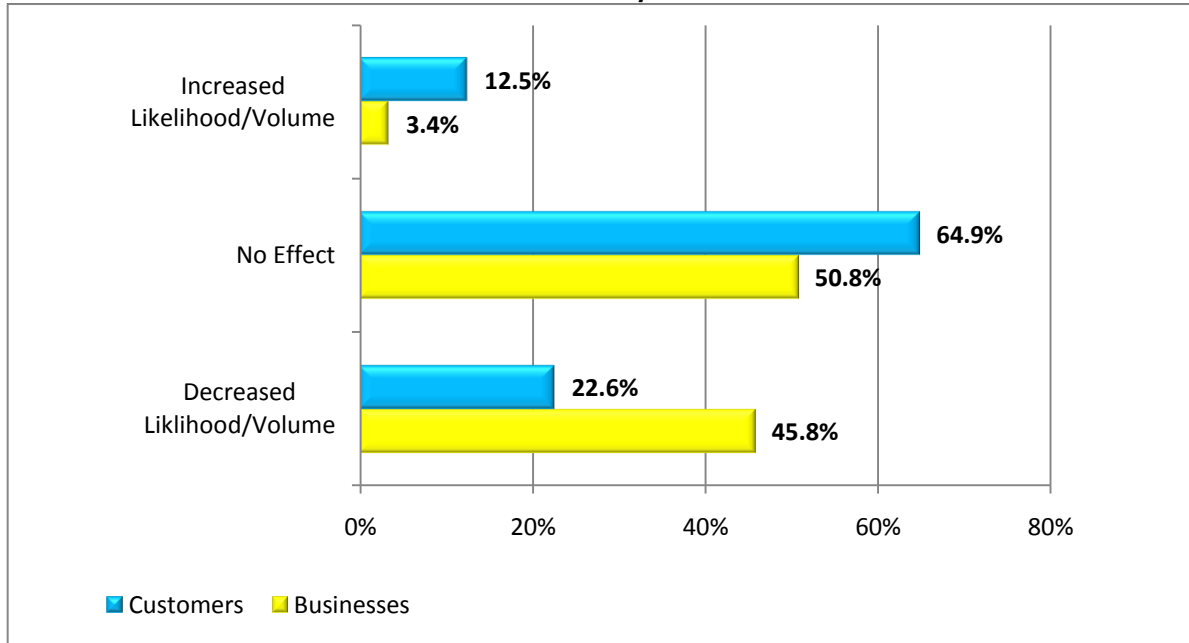
more likely than those in the midtown to perceive positive effects as a result of reduced on-street parking. Customers were also asked how a reduction in on-street parking might affect their likelihood of visiting the area or business. The majority of customers in all three locations reported that they would be equally likely to visit the area or business if there was reduced on-street parking. While the majority reported no likely effect, a higher proportion of customers responded that they would be less likely to visit (23%) than more likely (13%). The smallest proportion of those reporting that they would be less likely to visit was in the downtown. This stands in contrast to the effects perceived by businesses.

As seen in Table 4.2 below, 13% of all customers reported that reduced on-street parking would in fact increase their likelihood of visiting the area or business, whereas only 3% of businesses perceived that this would have a positive effect on their business. The most notable difference in opinion on the positive effect between businesses and customers is within the midtown, where only 1% of businesses perceive a positive effect, yet 15% of customers said reduced on-street parking would increase their likelihood of visiting the area. Caution should be taken when interpreting these results: respondent perceptions regarding the effect of one aspect of the rapid transit corridor such as reduced street parking could be influenced by their perceptions of the effect of related changes such as a revitalized streetscape.

The most notable difference in opinion on the negative effects are among downtown respondents, where 52% of businesses but only 18% of customers report that reduced on-street parking would have a negative or decreased effect on customer volume.

Chart 4.3 and Table 4.2 present a comparison of the responses by businesses and customers, when asked how a reduction of on-street parking might affect business' perception of customer volume and customers' likelihood of visiting. As illustrated in Chart 4.3 below, the majority of customers and slightly more than half of businesses believe that reduced on-street parking would have no effect on them, and businesses perceive a much higher negative effect than customers.

**Chart 4.3: Overall Perceived Effect of Reduced On-Street Parking on Customer Volume/Visits**



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

**Table 4.2: Perceived Effect of Reduced On-Street Parking on Customer Visits**

	Positive Effect on Business/Increased Likelihood		Negative Effect on Business/Decreased Likelihood	
	Business	Customer	Business	Customer
Downtown	4.1%	13.0%	51.5%	17.8%
Midtown	0.7%	15.0%	49.3%	21.7%
Uptown	3.6%	10.5%	26.9%	30.8%
<b>TOTAL</b>	<b>3.4%</b>	<b>12.5%</b>	<b>45.8%</b>	<b>22.6%</b>

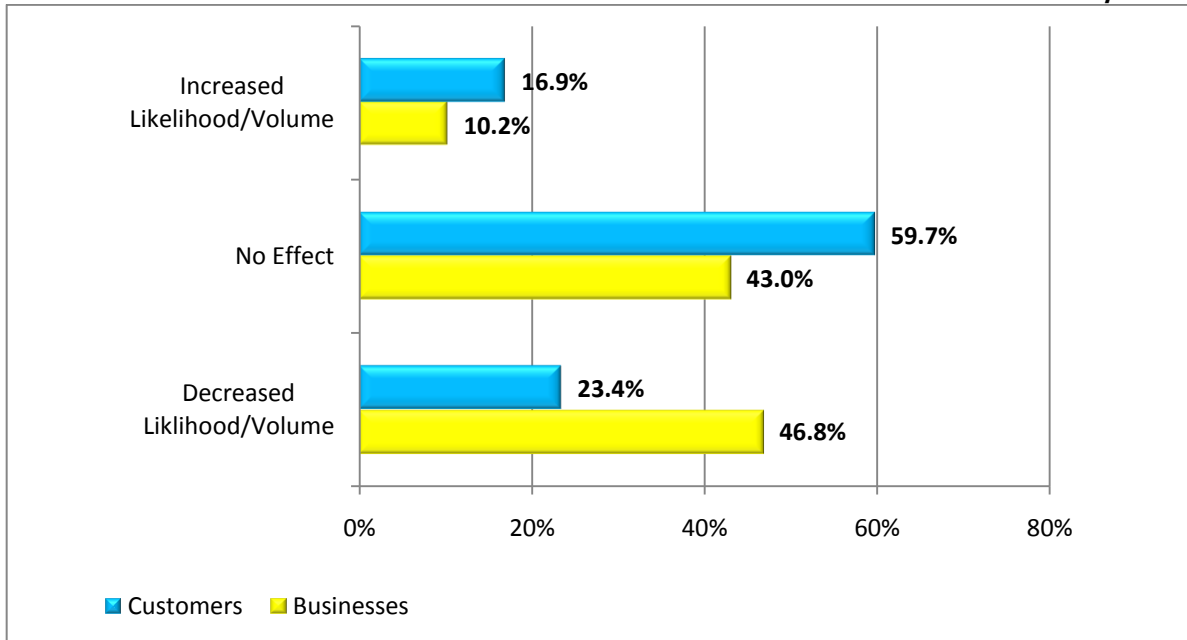
Source: Business Survey, n=496 and Customer Survey, n=433

### 4.3 Effects of Reduced General Purpose Traffic Lanes

Development of a rapid transit corridor would likely result in changes to the number of general purpose/public traffic lanes in some areas in order to allow space for designated rapid transit lanes. Respondents to both the business and customer surveys were asked their opinion about how a reduction in general purpose traffic lanes might affect them. Businesses were asked with respect to how it might affect their business, and customers were asked with respect to how it might affect their likelihood of visiting the business or area. As discussed in Section 2.4, businesses in the midtown and uptown were more likely to perceive a negative effect on their business as a result of reduced traffic lanes. Just over half of businesses (53%) in the downtown anticipated that there would be no effect on their business. Section 3.3 illustrated that reduced general purpose traffic lanes would have no effect on the majority of customers' likelihood of visiting.

Businesses were more likely than customers to report that reduced traffic lanes would negatively affect customers or make them less likely to visit. Across all geographic locations, where 47% of businesses reported a negative effect on business, 23% of customers reported that they would be less likely to visit as a result of reduced traffic lanes. In fact, according to customer respondents, the majority (60%) reported that it would not affect their likelihood of visiting, but more notably, 17% of customers reported they would be more likely to visit. Chart 4.4 and Table 4.3 below provide a comparison of responses by businesses and customers.

**Chart 4.4: Overall Perceived Effect of Reduced Traffic Lanes on Customer Volume/Visits**



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

**Table 4.3: Perceived Effect of Reduced Traffic Lanes on Customer Volume/Visits**

	Positive Effect on Business/Increased Likelihood		Negative Effect on Business/Decreased Likelihood	
	Business	Customer	Business	Customer
Downtown	14.4%	14.8%	33.0%	18.7%
Midtown	4.6%	15.8%	64.5%	26.3%
Uptown	2.9%	20.7%	71.9%	30.0%
<b>TOTAL</b>	<b>10.2%</b>	<b>16.9%</b>	<b>46.8%</b>	<b>23.4%</b>

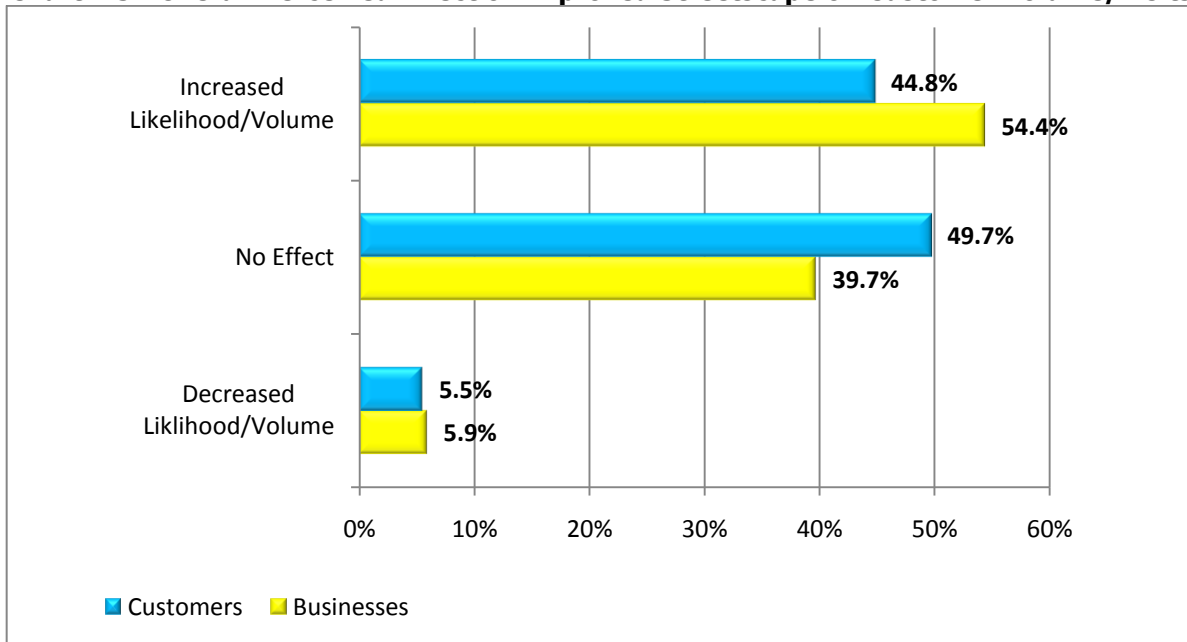
Source: Business Survey, n=485 and Customer Survey, n=427

#### 4.4 Improved Aesthetics of the Streetscape

One component of the proposed rapid transit development plan includes streetscape beautification and possibly widening of the sidewalks. Though information was not available with respect to the details included in improving the aesthetics of the streetscape, businesses and customers alike were asked how this might affect them. Surprisingly, there were some responses from both the business and customer surveys indicating that they would be less likely to visit, or that this would have a negative effect on their business. Neither survey asked respondents to qualify their answers, so the reasons for their negative reactions are unknown. While these respondents comprise a very small proportion of all responses, the proportion is similar in both surveys, at 6% overall.

This question yielded the most consistent responses between the two survey groups, though there was still some variability. Additionally, a comparison of the responses shows that with respect to this particular issue, businesses overall were more likely than customers to perceive a positive effect or report an increased likelihood of visiting. Where 54% of businesses reported a positive effect, a smaller proportion of customers (45%) reported an increased likelihood of visiting. The most notable difference was among downtown respondents, with 63% of businesses compared with 50% of customers reporting increased business. Chart 4.5 and Table 4.4 below present the findings.

**Chart 4.5: Overall Perceived Effect of Improved Streetscape on Customer Volume/Visits**



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

**Table 4.4: Perceived Effects of Improved Streetscape on Customer Volume/Visits**

	Positive Effect on Business/Increased Likelihood		Negative Effect on Business/Decreased Likelihood	
	Business	Customer	Business	Customer
Downtown	63.1%	50.4%	3.9%	3.5%
Midtown	43.1%	51.7%	13.2%	6.9%
Uptown	38.5%	33.1%	5.2%	8.3%
<b>TOTAL</b>	<b>54.4%</b>	<b>44.8%</b>	<b>5.9%</b>	<b>5.5%</b>

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

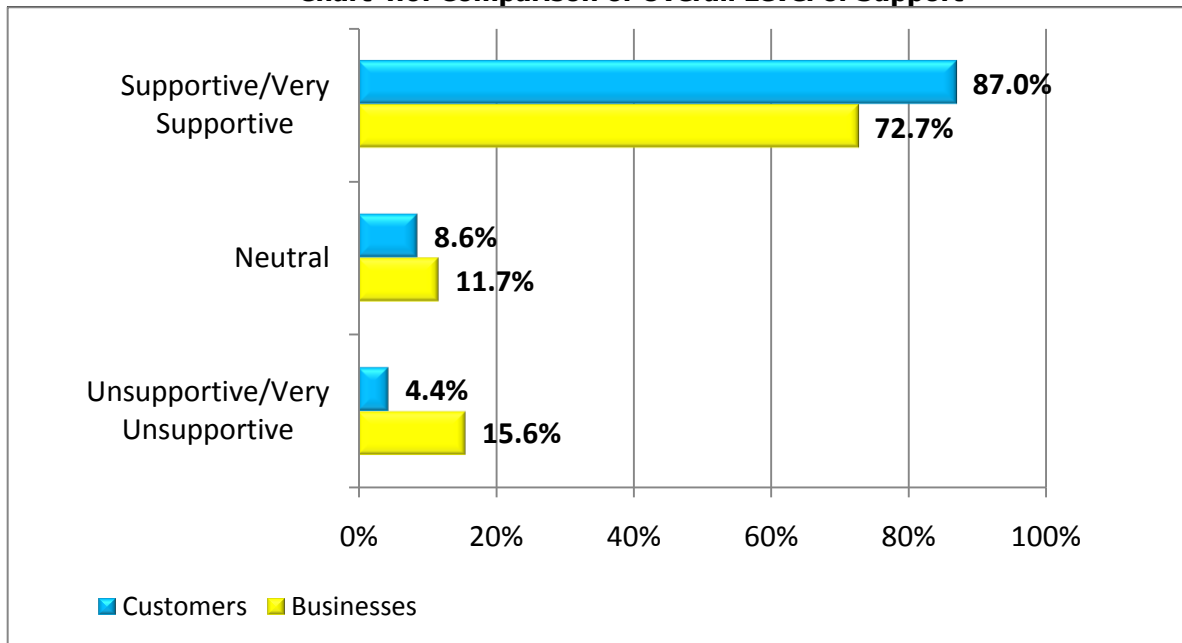
#### **4.5 Support of Rapid Transit to Connect the West Shore Communities with Downtown**

There appears to be overall support for the development of rapid transit in the Victoria area among both businesses and customers, although customers reported higher levels of support than businesses. Nonetheless, the majority of both respondent groups reported that they were either supportive or very supportive, with 73% of businesses and 87% of customers indicating this. Among businesses, the highest level of support was within those in the downtown (81%), followed by the midtown (62%), and finally the uptown (59%). Customer support by area was relatively consistent, ranging from 87% (downtown, uptown) to 90% (midtown).

Businesses and property owners in the uptown were most likely to be unsupportive of rapid transit (30%), followed closely by midtown businesses and property owners (27%). A remarkably smaller proportion of businesses and property owners in the downtown were

unsupportive, with only 8% expressing this opinion. Overall, 16% of businesses were unsupportive, compared with only 4% of customers. Of interest is that while the proportion of business and property owner respondents who were unsupportive increases from the downtown to the uptown, the reverse is true among customers, where only 2.1% in the uptown were unsupportive of rapid transit. Chart 4.6 and table 4.5 below present the findings.

**Chart 4.6: Comparison of Overall Level of Support**



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

**Table 4.5: Overall Support of a Rapid Transit Corridor**

	Overall Supportive		Overall Unsupportive	
	Business	Customer	Business	Customer
Downtown	80.7%	86.5%	7.6%	5.2%
Midtown	61.8%	89.7%	26.8%	6.9%
Uptown	58.6%	86.9%	29.4%	2.1%
<b>TOTAL</b>	<b>72.7%</b>	<b>87.0%</b>	<b>15.6%</b>	<b>4.4%</b>

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

Both the business and property owner survey and the customer survey asked respondents if they had any final comments. The comments need to be considered with some caution as not all respondents had a final comment. It could also be that individuals who did provide final comments felt particularly strong about a specific issue. Therefore, these cannot be considered representative of the overall opinions, but rather they are simply meant to highlight some of the issues and concerns raised by both businesses and customers.

A comparison of the comments provided by each survey group reveals that businesses and customers have similar concerns with respect rapid transit, and many would like to see similar outcomes. The following themes were common amongst both survey respondent groups:

- Overall supportive
- Overall unsupportive
- Concerns with the locations/routes, hours, fare, or connections
- Concerns with increased traffic, difficulty parking/loading
- Concerns with the construction phase/construction outcomes
- Support for light rail specifically

Overall, respondents in both groups were generally supportive of the idea. However, there was concern about what the system would look like, where it would go, and how much the current traffic flow would be disrupted. Businesses do not want to see vehicle access to their property diminished. This is particularly the case with businesses on cross streets where either left or right hand turn lanes from the main street might be affected. Some respondents from both businesses and customers surveys were unsupportive of a corridor along Government Street, as they didn't want to see the 'charm' of the street affected or ruined. Several respondents with a particular opinion also mentioned that light rail would be preferable to rapid bus transit. Caution should be taken when considering these volunteered comments as the survey did not ask all respondents their opinion on routes or modes. Respondents from both groups did however mention that, if it is going to be developed, it needs to be developed properly. This includes ensuring that whatever the mode or route of the system, the hours of operation are appropriate, the connections are well timed and logical, and that it is affordable. Some respondents from both surveys mentioned that they are aware of the financial costs involved, and thus would want to see a system that is actually used by the public.

#### **4.6 Consultant's Observations**

This study exceeded initial survey targets and obtained reliable data on the opinions of both businesses and customers in the survey catchment area: 519 business/property owner surveys were completed with a margin of error of  $\pm 4.2\%$  at the 95% confidence level for overall results, and 442 customer surveys were completed, with a margin of error of  $\pm 4.7\%$  at the 95% confidence level.

Overall, most businesses are supportive of the need for the development of rapid transit (73%). However, when presented with the prospect of changes to the streets near their locations, businesses may be concerned that rapid transit would result in less customer volume and traffic into their business. A comparison of the responses suggest that this would not necessarily be the case, as many customers reported that they would actually be more likely to visit the area or business if rapid transit was developed. Additionally, most customers reported an increased likelihood of visiting the area if the streetscape were improved. Where the opinions of businesses and customers appear to be more aligned is on the issue of reduced street parking and general purpose traffic lanes. With respect to reduced street parking, 65% of customers said it would have no effect on their visit as compared to 51% of businesses indicating no effect on customer volume. Twenty-three percent of customers said it would have a negative effect while 46% of businesses indicated the same.

With respect to reduced general purpose traffic lanes, 60% of customers reported this would have no effect on their likelihood of visiting, compared with 43% of businesses. And while almost half (47%) of businesses perceive this would have a negative effect on customer volume, less than a quarter (23%) of customers said it would reduce their likelihood of visiting.

Users of the survey results reported here should bear in mind that survey respondents were provided with only very brief descriptions of the rapid transit corridor and were asked to comment on hypothetical scenarios (e.g. "If a rapid transit corridor was developed..."). The survey respondents' perceptions and opinions should not be taken as fact. That is to say, customers' responses when surveyed about hypothetical scenarios will not necessarily translate into actual behaviours should those scenarios be implemented. Similarly, the survey responses of businesses and property owners should not necessarily be taken as fact or used as direct projections of future circumstances.

Nevertheless, the survey results provide a valuable and relatively reliable indicator of the issues that are important to businesses, the perceived impacts of changes to corridor streets (streetscape beautification, widening of sidewalks, reduced lanes of traffic, reduced street parking or access to properties), issues that might require further communication/education, and potential risks associated with the implementation of a rapid transit corridor.

What is clear is that the vast majority of customers (87%) and close to three-quarters (73%) of businesses and property owners are generally supportive of a rapid transit corridor. The challenge for the VRRT planners is not in convincing the business community as a whole that rapid transit is desirable or required, but in addressing concerns as to how it may be implemented, and in addressing potential impacts on the specific businesses/properties that may be directly affected.