



ADMINISTRATIVE REPORT

Report Date: January 26, 2010
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Meeting Date: February 4, 2010

TO: Standing Committee on City Services and Budgets
FROM: General Manager of Engineering Services and the Director of Planning
SUBJECT: Summer Spaces: Monitoring and Evaluation

RECOMMENDATION

THAT Council receive this report for information.

COUNCIL POLICY

Council adopted a definition of Social Sustainability in 2005 that includes maintaining or enhancing social or community capacity, defined in part through:

- Opportunities and places for social interaction throughout the community;
- Opportunities, resources and venues for a variety of arts, cultural and community activities; and,
- Support and encouragement for community organizations and networks.

Council policy prioritizes transportation modes as follows: walking, cycling, transit, goods movement, and private automobiles.

Council annually approves the temporary reallocation of streets for pedestrian uses; historically, the majority of these approvals have been for annually occurring special events.

In April 2009, Council received the Mayor's Greenest City Action Team's Quick Starts Report, which recommended early actions the City can take to help Vancouver become the greenest city by 2020, including conducting car free Vancouver trials.

In October 2009, Council received the Mayor's Greenest City Action Team's strategy Vancouver 2020 A Bright Green Future which encourages the City to explore opportunities to re-imagine its public spaces in new and innovative ways.

SUMMARY

The 2009 Summer Spaces trial aimed to build upon the success and popularity of Vancouver's block parties and annual one-day community street festivals by *expanding* the City's repertoire of on-street pedestrian experiences, thereby enhancing community capacity and fostering social sustainability.

The Public Space model of car free initiatives, utilized by the pilot, introduced the four neighbourhoods selected for the trial to a type of pedestrian experience new to this city: temporary (linear) pedestrian plazas. The trial produced 24 instances of temporary community public spaces across selected sections of Mount Pleasant, Commercial Drive, Gastown and Collingwood over the months of July, August and September.

The monitoring and evaluation program of the summertime trial has brought to light several significant findings:

1. There is an at-large community appetite for street experiences of this kind, evidenced by: 86% percent of resident survey respondents indicating support for the goals of the program, 81% of resident survey respondents indicating support for the City continuing to further refine the program, positive participant comments, and overall increase in pedestrian and bicycle volumes.
2. The experience of the four areas has shown that no single 'one size fits all' approach will assure success when implementing the Public Space model. Instead, the evaluation points consistently to three *linked* variables for consideration *simultaneously* and adjusted depending on the specific neighbourhood and street in which the recurring public space is situated. The linked variables are: *scale*, *frequency*, and *on-street activities*.
3. Stemming primarily from the recurring nature of the street closures and the general unfamiliarity of the Public Space model within the Vancouver context, three major opportunities for improvement surfaced over the course of the trial. They relate to:
 - A. Transportation impacts
 - B. Business impacts
 - C. Difference between public expectations and the on-street experience

The Summer Spaces trial increased the range of on-street pedestrian experiences available to communities and offers a unique and valuable opportunity for residents to meet and interact on the street. It is important to recognize that this was the first time that the Public Space model was attempted. By applying the lessons learned from the 2009 Summer Spaces trial to a program in future years, the City can continue to build on the successes of the 2009 program while also developing a new funding model that aims to make the program self sustaining in future years. In addition, the considerable gains in knowledge and experience could also be applied to the other remaining untested 'car free' models over time, i.e. 'Active Living' and 'Seasonal Pedestrianization'.

PURPOSE

This report fulfils Council's instruction to report back on the evaluation of the 2009 Summer Spaces car free days trial as approved by Council in June 2009.

BACKGROUND

On December 16, 2008, as part of the 'Kick Starting Green Initiatives', Council passed a motion for a three month Sunday car-free street initiative to take place in three Vancouver commercial districts. Staff investigated and reported to Council on March 3, 2009 with various car-free initiative models and preliminary feedback from select community organizations. At that time, Council instructed staff to undertake a stakeholder consultation and to report back on the results of the consultation and recommended initiatives, including possible cost implications. On June 2, 2009, Council approved immediate implementation of Summer Spaces car-free trials in four neighbourhoods using the Public Space model and approved, in-principle, an Active Living model 'ciclovia' for implementation in 2010.

Research included in the March 2009 report to Council showed that currently, world-wide, car free initiatives tend to fall into one of five categories:

- The Active Living model
- The Community Festival model
- The Block Party model
- The Seasonal Pedestrianization model
- The Public Space model

The model that most closely captures Council's direction to have trials take place in commercial districts on a weekly basis is the Public Space model. Public Space initiatives aim to draw residents from the local neighbourhood to make use of increased public space. There are several intended outcomes associated with this model, including improved walkability and bicycle safety, increased physical activity and reducing GHGs. However, the two most salient outcomes are: increased public space and community interaction, therefore strongly supporting Council's priority of building strong, safe and inclusive neighbourhoods.

DISCUSSION

PART 1: IMPLEMENTATION

The community organizations selected for the 2009 trial, in partnership with the City, implemented a series of four recurring street closures that differed significantly in scale, choice of on-street activities, and total number of weekly recurrences. However, all recurrences took place on consecutive weeks on Sundays. Three of the series took place on commercial streets while one was located on a non-commercial street. When combined, the four series produced a total of 24 instances of temporary community public space across four neighbourhoods, (Mount Pleasant, Commercial Drive, Gastown and Collingwood) spread over July, August and September. Three of the four areas completed the proposed number of recurrences as set out within their proposals; the Commercial Drive series, however, ended three weeks early after the majority of the area's merchants asked the host organization to stop the series mid-way since many of them reported revenue losses. Details of each series can be found in Appendix A of the report.

The Summer Spaces host organizations generally felt positive about their involvement in the initiative and communicated that they gained new knowledge, skills and community connections as a result of this trial. The community hosts indicated interest in participating in the program again if approved for future years, with some changes, however, to choice in location, mix of activities, improved signage and promotional materials, for example. All of

the organizations agreed that support from the City and an increase in the time available for planning are critical factors for continued involvement.

PART 2: FINDINGS

The Summer Spaces program aimed to build upon the success and popularity of Vancouver's block parties and annual one-day community street festivals by *expanding* the City's repertoire of on-street pedestrian experiences, thereby enhancing community capacity and fostering social sustainability.

The Public Space model of car free initiatives, utilized by the pilot in four selected neighbourhoods, introduced Vancouver to a new type of pedestrian experience: temporary (linear) pedestrian plazas. A rigorous monitoring and evaluation program was used by staff to assess the four Summer Spaces trials (see Part 3, and Appendices B to F for data and analysis). Exploration of the Public Space model has thus brought to light several significant findings:

1. There is an at-large community appetite for street experiences of this kind, evidenced by: 86% percent of resident survey respondents indicating support for the goals of the program, 81% of resident survey respondents indicating support for the City continuing to further refine the program, positive participant comments, and overall increase in pedestrian and bicycle volumes.
2. The experience of the four areas has shown that no single 'one size fits all' approach will assure success when implementing the Public Space model. Instead, the evaluation points consistently to three *linked* variables for consideration *simultaneously* and adjusted depending on the *specific neighbourhood and street* in which the recurring public space is situated. The linked variables are: *scale*, *frequency*, and *on-street activities*.

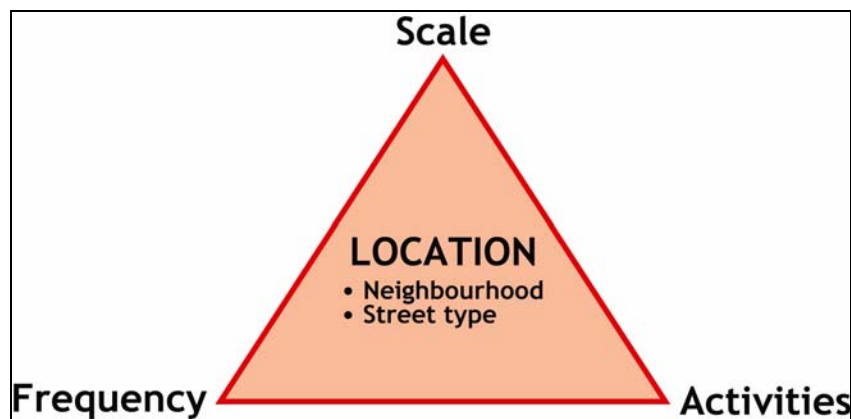


Figure 1: Understanding the Public Space model - key variables for developing street closures.

3. Stemming primarily from the recurring nature of the street closures and the general unfamiliarity of the Public Space model within the Vancouver context, three major opportunities for improvement surfaced over the course of the trial. They relate to:
 - A. Transportation impacts
 - B. Business impacts
 - C. Difference between public expectations and the on-street experience

A. Transportation Impacts

Overall, Summer Spaces was successful in attracting primarily local residents, especially in Main Street and Commercial Drive. Most participants (68-80%) used sustainable modes (walking, cycling, or transit) to access the temporary linear pedestrian plazas. Additionally, pedestrian and cyclist volumes increased significantly on the host streets during Summer Spaces Sundays. This increase in walking and cycling is encouraging as it indicates residents' desire to experience and use these streets in a different way as temporary public spaces. The results also show there is an opportunity for the program to provide a platform for engaging residents on issues such as neighbourhood walkability or cycling safety.

As the Summer Spaces trials involved recurring temporary road closures, host neighbourhoods experienced varying impacts on their local transportation networks, depending on the street type and the scale of the closure. While neighbourhood walkability and opportunities for cycling were enhanced, the long term viability of Summer Spaces in a given neighbourhood partially depends on developing strategies to reduce impacts on the local transportation system. Evaluation of the trials, using a variety of data sources, indicates that negative transportation impacts primarily fall into four categories, which relate to one another:

1. Transit (residents, businesses, general transit users).
2. Access to businesses.
3. Parking (residents and businesses).
4. Increased vehicular traffic on local streets (residents).

Impacts on transit were significant on Commercial Drive and Main Street, which both carry heavily-used trolley bus routes. Summer Spaces road closures required that buses running on these streets be replaced with diesel buses, with associated GHG emission and air quality implications, and rerouted four to eight blocks away from the closure (see Figure 2 below). This inconvenienced not only residents trying to access their local bus route, but also transit users from other areas trying to access the host neighbourhood. For elderly residents or persons with mobility impairments, an extra four to eight block walk to transit could be a considerable challenge. Re-routings also affect transit reliability as buses cannot run according to their published schedule. As well, because notification signage at affected bus stops was of the type used for one-day special events or street festivals, transit users were not made aware that the bus re-routings were recurring for several weeks.

Merchants identified reduced access to their businesses due to road closures as being a major concern, and the likely reason behind reduced sales. In particular, Summer Spaces impacted potential customers arriving by automobile, and also those arriving by transit on Main Street and Commercial Drive. These impacts were especially apparent for commercial streets that attract a significant number of destination visitors on weekends, such as Commercial Drive. Merchants cited lack of parking and the general disruption caused by a road closure as reasons that auto-based destination customers might avoid a host area. Even if lost sales revenue could be recouped by enhanced sales from Summer Spaces participants, some destination merchants expressed a concern that regular customers could be lost permanently due to recurring closures. Additionally, the standard signage and barricades used to close the road to vehicles were uninviting and gave the impression that people should avoid the area.

Loss or lack of parking was cited as a major concern not only by businesses but also by local residents. When a road is closed, all on-street parking is lost, and therefore demand for parking space is displaced into the surrounding neighbourhood. Although public space initiatives such as Summer Spaces are not intended as destination venues attracting event-

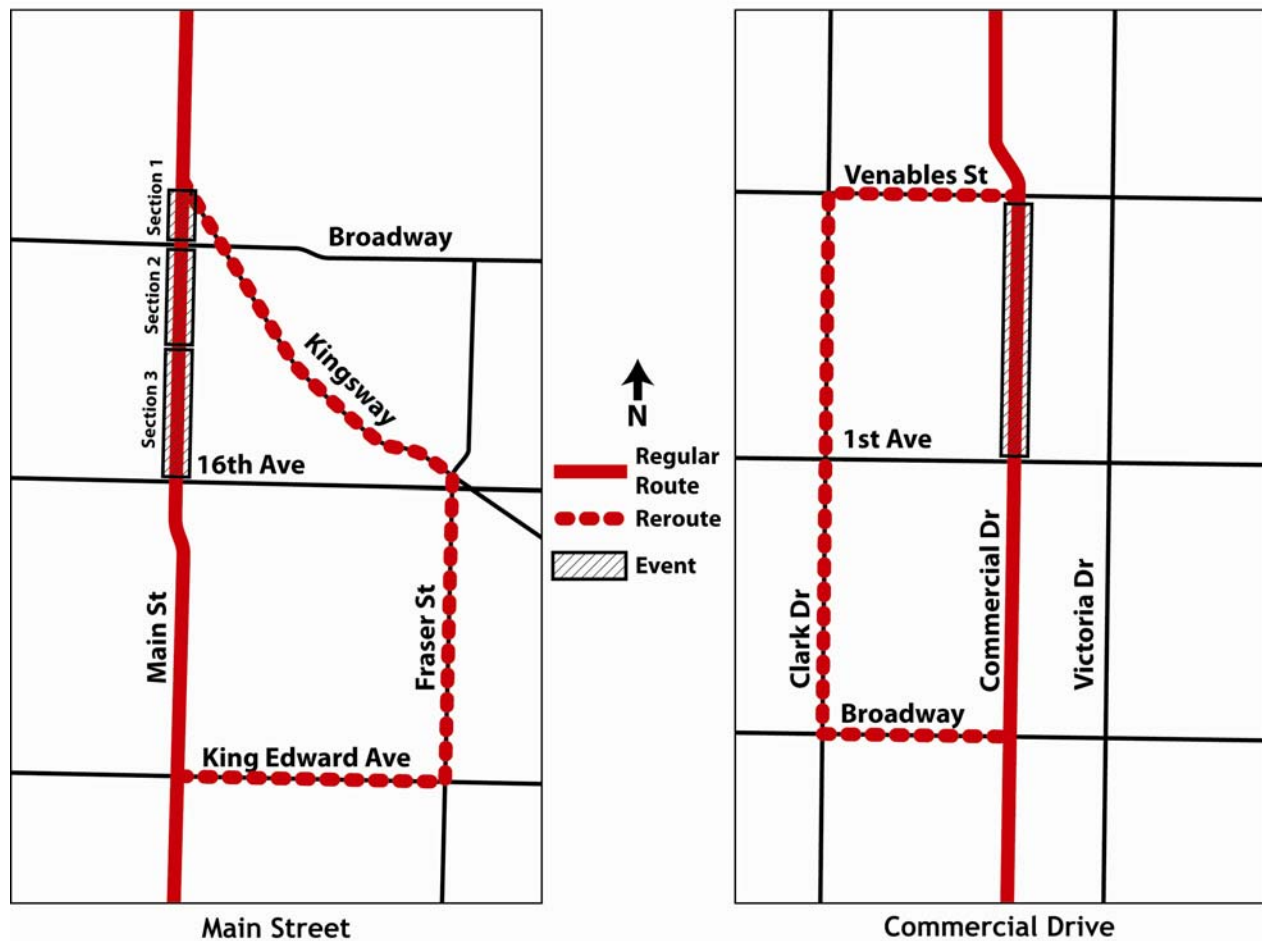


Figure 2: Transit bus reroutes during Summer Spaces. Source: TransLink.

goers arriving by private automobiles, induced parking demand can further reduce the availability of parking space for local residents (and their visitors) who might have to park blocks away from their own residence on a Summer Spaces day, particularly if there are few alternative parking facilities for incoming automobiles close to the area of the closure.

Temporary road closures can impact residential neighbourhoods by increasing vehicular traffic volumes on local streets. This is caused by diverted through-traffic, as well as destination drivers trying to access the closed section of the street. Loss of on-street parking can also contribute to increased traffic as motorists circulate on local side streets looking for parking. For neighbourhoods, such impacts are particularly noticeable on traffic-calmed streets that typically have very low traffic volumes.

The temporary reallocation of road space on a recurring basis thus necessitates a new approach to street closures that helps mitigate these transportation impacts and is different from the treatment given to annual one-day special events. By learning from the trials, opportunities can be identified that help achieve this. Options to explore could include:

- More 'welcoming' road closure signage and barricades.
- Improved transit reroute signage and wayfinding to bus reroutes.
- Less disruptive bus reroutes if possible.

- Securing unused school or other parking lots for destination customers' parking.
- Temporary resident-permit-only parking on local streets in affected neighbourhoods to preserve residents' on-street parking.
- Use of soft closures (allow local access but discourage through-traffic) where appropriate to help minimize traffic diverting through residential neighbourhoods.

B. Business Impacts

The Summer Spaces evaluation program has attempted to gauge the impact of temporary recurring pedestrian plazas on business sales and to better understand resident and participant shopping patterns on trial days. The impact of these recurring street closures on business sales has been mixed. Depending on a range of factors, 21% of businesses reported an increase in sales, 33% reported no noticeable impact on sales, and 43% reported a decrease. The finding that some businesses experienced a decrease in sales during Summer Spaces is significant and bears further consideration given the general increase in pedestrian and bicycle volumes during the trial and residents reporting very little to no change to their regular Sunday shopping habits and ability to shop in their local neighbourhoods. A range of possible factors are likely at play, including reduced access for destination customers and the particular shopping patterns of Summer Spaces attendees.

The introduction of temporary and recurring public spaces along commercial streets by way of the Summer Spaces trial has shed light on the complex ecology of business areas. The pilot has shown that each commercial district is home to unique shopping patterns influenced by several variables, including mix of business types and locational and market characteristics. Neighbourhood business areas are key components of complete, livable and sustainable communities that have living, working and shopping choices accessible by walking, cycling and transit. Therefore, to provide the greatest positive impact on a neighbourhood business area, the selection of future Summer Spaces host communities together with choices in the frequency, scale, and mix of on-street activities will need to consider the findings of the evaluation program in light of the specific business ecology of each area. Not doing so could have significant lasting impacts on the long term viability of businesses-types in a community. It follows that the greater the frequency and/or longer the period of any future pedestrian spaces, the greater the potential negative impact on neighbourhood business areas if the selection and implementation processes are not well-informed.

The weekly occurrence of Summer Spaces in 2009 did generate awareness of this program among local residents and businesses thereby providing a variety of lessons/ideas going forward so that BIAs and others will better understand how to organize a Summer Spaces neighbourhood series and enroll businesses to participate; and businesses will better understand how they might participate to take advantage of increased pedestrian traffic. An important first step towards maximizing benefits and minimizing impacts on business would be to make more time available for a proposal's planning phase than was the case in 2009, thus giving all stakeholders sufficient time to develop workable strategies for business around such issues as improved access to a commercial area for destination customers.

C. Expectations around on-street experience

The trial introduced Vancouver residents to a new pedestrian street closure *model* and, a new weekly pedestrian street closure *frequency*. This combination of model and frequency produces an on-street pedestrian experience that aims to engage participants differently than a block party or community street festival would.

Although participant comments generally indicated positive on-street experiences, resident and business remarks reveal that many viewed Summer Spaces, particularly the two series taking place along Main Street and Commercial Drive, in the same light as a highly programmed one day street festival. Many expected their on-street experience to be very similar to Vancouver's popular annual one day Car Free Day festival, meaning a high intensity experience with large crowds and a lot of entertainment. This interpretation of the Summer Spaces on-street experience likely stems from the general unfamiliarity of the Public Space model within the Vancouver context along side the history and popularity of the annual Car Free Day festival in Vancouver, the ongoing references to the initiative as 'car free days' in media reports, and the tight timelines for planning each series.

With this improved understanding of expectations around on-street experience, refinement of the Summer Spaces program would need to include better use of on-street cues that clearly communicate to participants how the street is intended to be experienced, i.e. less like a high intensity festival and more like an engaging public space that incorporates elements to enhance business. Possible cues could include custom signage and the introduction of temporary street furniture for example.

Building on Experience

The introduction of the Public Space model to Vancouver increases the range of on-street pedestrian experiences available to communities and offers a unique and valuable opportunity for residents to meet and interact on the street. It is important to recognize that this was the first time the Public Space model was attempted in Vancouver. Like most "first attempts" there were both anticipated and unanticipated successes and challenges. By applying the lessons learned from the 2009 Summer Spaces trials to a program in future years, the City can continue to improve the implementation and experience of the model while also developing a new funding model that aims to make the program self sustaining. In addition, the considerable gains in knowledge and experience could also be applied to the other remaining untested 'car free' models over time, i.e. 'Active Living' and 'Seasonal Pedestrianization'.

Changes and Options for Future Years

More time to plan for and promote future street closures is a critical first step if the program continues in the future. This would provide community organizations with the time necessary to adequately explore and implement the best combination of programming options and strategies to mitigate transportation and business impacts appropriate for the street in question. Additionally, more planning time would give businesses a better opportunity to take advantage of the increased pedestrian and bicycle traffic at the street closures. The following table shows a range of mitigation and improvement options that could be used to improve the program:

IDENTIFIED AREAS OF IMPROVEMENT	MITIGATION OPTIONS FOR FUTURE YEARS
Increase amount of time available for planning and promotion of street closures	<ul style="list-style-type: none"> • Distribute Call for Proposals to the community by mid-February and allow 4 weeks to submit proposals • Selection of proposals completed by early April, leaving approximately 3 months for planning and promotion, including the creation of strategies for business to increase customer traffic and sales
Transportation impacts	<p>Options to explore include:</p> <ul style="list-style-type: none"> • More 'welcoming' road closure signage and barricades • Improved transit reroute signage and wayfinding to bus reroutes • Less disruptive bus reroutes if possible • Securing unused school or other parking lots for destination customers' parking • Temporary resident-permit-only parking on local streets in affected neighbourhoods to preserve residents' on-street parking • Use of soft closures (allow local access but discourage through-traffic) where appropriate to help minimize traffic diverting through residential neighbourhoods • Reducing the frequency of street closures per series
Business impacts	<p>Options to explore include:</p> <ul style="list-style-type: none"> • Neighbourhood and retail mix assessment prior to area selection • Reducing the frequency of street closures per series • Making some provision for temporary vehicular parking and access to attract/satisfy destination customers • Identifying engaging programming and street activities that attract families
Expectations around on-street experience	<p>Options to explore include:</p> <ul style="list-style-type: none"> • Introducing temporary street furniture and other on-street elements on which participants can sit and/or interact with • More 'welcoming' signage • Improved promotion of on-site street activities and programming

PART 3: MONITORING AND EVALUATION PROGRAM

The monitoring and evaluation program of the 2009 Summer Spaces trial had six components:

1. Pedestrian and Cyclist Counts

Pedestrian and cyclist counts were conducted on the four streets that had Summer Spaces trials in order to compare the pedestrian/cyclist volumes during Summer Spaces to those of typical Sundays (base counts), as well as to determine changes in volumes over the course of each Summer Spaces series.

Overall, pedestrian volumes increased approximately 100 to 150% on Summer Spaces Sundays. Volumes declined somewhat later in the series, with Gastown being the exception. Cyclist volumes increased approximately 60% on Main Street and Commercial Drive during Summer Spaces. Detailed findings from the pedestrian and cyclist counts for each neighbourhood are contained in Appendix B.

2. Vehicle Counts

Vehicle counts were conducted on residential streets near the Collingwood and Commercial Drive Summer Spaces closures in order to assess the impact of diverted traffic on residential neighbourhoods.

Vehicle volumes on residential streets generally increased by 100 to 200% during Summer Spaces Sundays, except where a 'soft closure' was used to reduce diverted through-traffic while maintaining local access. Detailed findings from the vehicle counts can be found in Appendix C.

3. Intercept Survey

Summer Spaces participants were randomly approached by City staff on select dates at the four trial locations and asked to take part in an intercept survey. Participants were asked to give their opinions on various aspects of the respective Summer Spaces and to provide information on shopping habits, place of residence, mode of transportation, and amount of time spent on the street.

The trial was largely successful in maintaining the 'local' focus or draw envisioned for the program since the majority of Summer Spaces participants came from each of the local hosting neighbourhoods. With respect to mode share, most participants surveyed arrived to Summer Spaces areas using sustainable modes of transportation: on average, 51% of participants chose to walk, 10% chose to cycle, and 13% chose to take transit. Detailed Intercept Survey findings are attached as Appendix D.

4. Resident Survey

A survey targeting residents living in close proximity to the four Summer Spaces locations was delivered by post to households in early September 2009. Respondents were asked to comment on various aspects of the series in their community, to identify neighbourhood impacts and to indicate their level of support for the pilot.

Survey results reveal a high level of resident support for this car free initiative. When asked to indicate level of support for the pilot program's goals, overall, 67% indicated strong support and 19% indicated being somewhat supportive. Thirteen percent indicated not supporting the program's goals. Respondents were also asked whether or not they supported having their neighbourhood host a future Summer Spaces series. 'Yes' responses from the four

areas ranged from 74-90%. In addition, the survey asked residents to indicate whether or not they supported the City continuing to further refine its Summer Spaces program: 81% percent of respondents answered yes. Detailed Resident Survey findings are attached as Appendix E.

5. Retail Commercial Impact Study

An independent study was undertaken by Hume Consulting to gauge the impacts of recurring street closures on different types of business. The study also aimed to assess how the unique locational and market characteristics of each commercial area may have contributed to the experience of businesses during the Summer Spaces trial.

Business responses to the retail commercial impact survey show that 21% of businesses reported an increase in sales, 33% reported no noticeable impact on sales, and 43% reported a decrease. Although the study found that there is no specific business mix or demographic characteristics that determine whether Summer Spaces will positively or negatively impact a commercial area generally, or business-types specifically, the study did identify a range of factors or variables to consider when selecting a Summer Spaces location. These include but are not limited to:

- The proportion of young families and young adults in a neighbourhood
- The population density of a neighbourhood
- The mix of local serving versus destination market businesses
- The proportion of businesses with a selection of cafes, restaurants and specialty/impulse foods
- The availability of transit and parking alternatives for destination customers

The complete report from Hume Consulting is attached as Appendix F.

SUMMER SPACES PROGRAM - 2010

This report comes forward as the City begins to implement the results of the 2010 budget process. Several departments are currently affected by service reductions, including the Special Events Office. Engineering has not allocated funding for a Summer Spaces 2010 in the 2010 budget; however, City staff have developed a timeline that could be used if the Summer Spaces program were to go forward in future years. This timeline would allow staff to apply lessons learned from 2009 to refine the Call for Proposals and selection process and ultimately improve the experience for residents and businesses. The timeline would allow staff to pursue opportunities to develop a new funding model for the program involving external partners, with the aim of making the program self sustaining in future years.

Timeline

- Mid February
Staff draft and distribute a revised Call for Proposals to community organizations.
- Mid March to early April
Staff receive, review and create a short list of proposals for possible inclusion in the 2010 program and begin developing a new funding model that would work towards making the program self sustaining in future years.

- April to June
Staff work with short listed Summer Spaces proponents to further refine initiatives and discuss feasibility. Planning begins for proposals identified as having the greatest possibility of success for all stakeholders concerned. Staff develop a monitoring and evaluation program and a communications plan in consultation with the selected community organizations.
- July to August/September
Initiatives are ready to proceed. Staff have ongoing coordination with Summer Spaces proponents to help ensure initiatives are successful. Staff coordinate the monitoring and evaluation program.
- September to October
Staff compile and analyze data and feedback from the Summer Spaces monitoring and evaluation program to help improve the program in the future and develop a 'How To' Guide that complements the work undertaken earlier in the season to create a self sustaining funding model for the program.

Estimated Cost

If Council wishes to proceed with Summer Spaces in 2010, staff will need to review how to reallocate funds. The estimated cost of implementing this Summer Spaces 'transition season' is \$135,000 in 2010 dollars. This total includes a reduced monitoring program compared to 2009 as well as funds for developing a 'How To' Guide for use by future host organizations and, a temporary full-time coordinator. The following table provides a breakdown of the proposed budget:

Temporary staff - Program refinement/development	\$35,000
Financial support to implement selected community proposals	\$35,000
Temporary staff - Program implementation	\$35,000
Communications Plan	\$10,000
Monitoring Program	\$10,000
'How To' Guide	\$10,000
TOTAL	\$135,000

The role of the temporary full-time Summer Spaces coordinator would be to refine the Call for proposals and selection process and begin development of a new funding model. After those steps, the coordinator would work with the selected neighbourhoods to help plan and implement the selected proposals and monitor the program. After the summer, staffing resources would be needed to develop a 'How To' Guide for use in subsequent years.

CONCLUSION

The 2009 Summer Spaces trial increased the range of on-street pedestrian experiences available to communities and offers a unique and valuable opportunity to residents to meet and interact on the street. Preliminary evaluation of the Summer Spaces trial has revealed several significant findings:

- The pilot was successful in achieving its primary goals of increasing the amount of community public space available in neighbourhoods and creating new opportunities for community interaction.
- The trial was largely successful in maintaining the 'local' focus or draw envisioned for the program since the majority of Summer Spaces participants came from each of the local hosting neighbourhoods.
- Most participants surveyed arrived to Summer Spaces areas using sustainable modes of transportation.
- There is very strong resident support for the City to continue refining the Summer Spaces car free initiative.
- The impact of recurring street closures on business has been mixed; significant increases in pedestrian and cycling volumes did not necessarily translate into increased sales for the majority of the merchants that participated in the Retail-Commercial Impact Study.
- There is no single 'one size fits all' approach to implementing the Public Space model; instead, the evaluation points consistently to three *linked* variables for consideration *simultaneously* and adjusted depending on the specific neighbourhood and street in which the recurring public space is situated. The linked variables are: *scale*, *frequency*, and *on-street activities*.
- More time is needed to plan and promote any future Summer Spaces series than was available in 2009.

Participating communities and the City have gained significant experience and knowledge through the 2009 Summer Spaces trial. If the program continues in future years, there is an opportunity to refine the Call for Proposals and selection process and ultimately improve the experience for residents and businesses. Additionally, it would provide staff with an opportunity to develop a new funding model for the program involving external partners, helping make the program self sustaining in future years and the City a recognized leader in how it creates and re-imagines its public spaces.

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APPENDIX A: NEIGHBOURHOOD TRIALS APPROVED FOR SUMMER SPACES 2009

	Commercial Drive - Open Streets	Collingwood Multicultural Summer Market	Gastown Farmers Market	Main Street: Market 1886 - Our Past Is Our Future
Host Community Organizations	Car Free Vancouver Society	Collingwood Neighbourhood House	Vancouver Farmers Markets & Gastown BIA	Mount Pleasant BIA
Number of Recurrences	4 (approved for 7)	5	9	6 (2 recurrences at each site listed below)
Site	Commercial Dr. between Venables St. & E. 1 st Ave.	Vanness Ave. between McGeer St. & McHardy St.	200 block Carrall St. between Cordova St. & Maple Tree Square	Site #1: Main St. between E. 7 th Ave. & E. Broadway Ave. Site #2: Main St. between E. Broadway & E. 12 th Ave. Site #3: Main St. between E. 12 th Ave. & E. 16 th Ave.
Dates	Sundays: July 5, 12, 19, 26	Sundays: July 19, 26 August 2, 9, 16	Sundays: August 2, 9, 16, 23, 30 September 6, 13, 20, 27	Sundays: July 5, 12, 19 August 9, 16, 23
Time of Day	12pm to 6pm	10am to 2pm	11am to 3pm	12pm to 5pm

APPENDIX B: PEDESTRIAN AND CYCLIST COUNTS

City staff conducted mid-block counts for four hours on a typical Sunday and two Summer Spaces Sundays (Main Street had counts every Summer Spaces Sunday), during the hours of the respective series. Cyclists included only those who were actually riding their bicycle; everyone else was considered a pedestrian.

Pedestrian and cyclist volumes increased considerably on the sections of the streets that hosted Summer Spaces. Overall, in the four neighbourhoods, pedestrian volumes increased 79-220% on Summer Spaces Sundays compared to a typical Sunday. Cyclist volumes increased by 59% on Main Street and 63% on Commercial Drive. However, cyclist volumes decreased on both Carrall Street and Vanness Avenue during Summer Spaces due to the closures occurring on bike routes.

Commercial Drive had two count locations along the eight block closure. Counts indicate that pedestrian volumes increased 132% on Commercial Drive during the first Summer Spaces Sunday compared to a typical Sunday one week before. Volumes declined 23% from the first to the fourth (last) Summer Spaces Sunday, though they were still up 79% compared to the base counts.

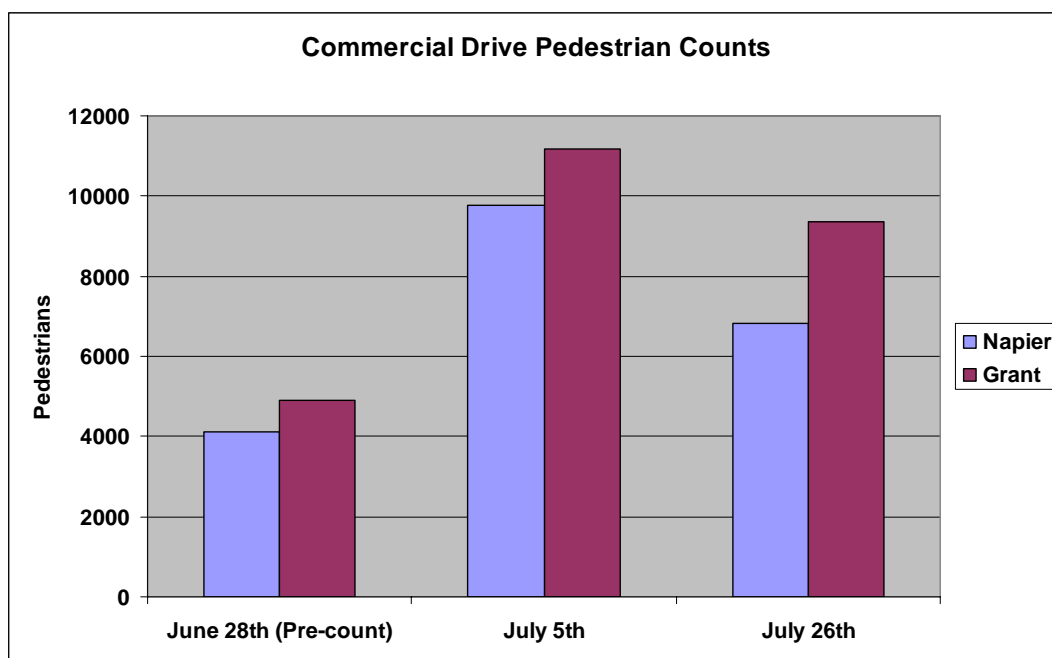


Figure 1: Commercial Drive pedestrian counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

Due to the rotating nature of the Main Street Summer Spaces, counts were conducted in three locations along the street every Summer Spaces Sunday in order to capture changes in pedestrian volumes in each of the three closure sections. In July, volumes increased an average of 177% in the three sections hosting Summer Spaces compared to the base counts. Volumes declined in August, though they were still up an average of 126% (excluding a rainy day) compared to the base counts. Counts along Main Street also show the 'spill over' effect of increased pedestrian volumes on blocks adjacent to the closed section of the street.

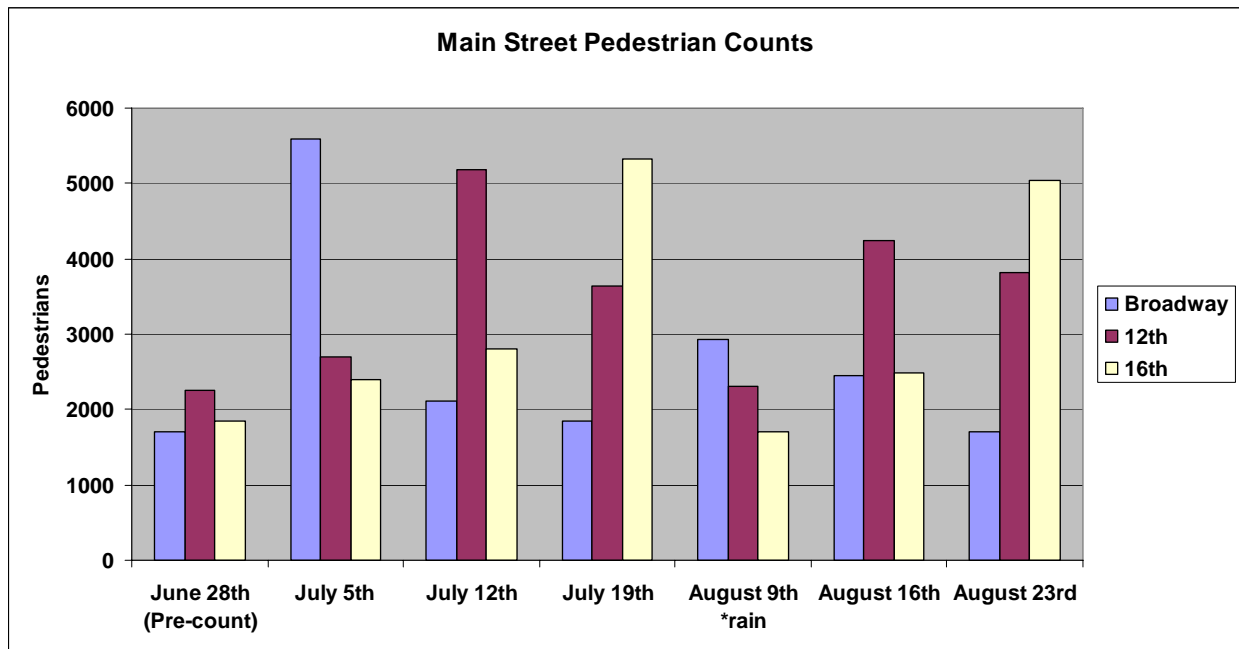


Figure 2: Main Street pedestrian counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

In Gastown, pedestrian volumes on the closed block of Carrall Street increased 100% during the first Summer Spaces Sunday compared to the base count. Volumes had increased an additional 10% by the fourth Summer Spaces Sunday. A second count location nearby on Water Street shows that pedestrian volumes were up approximately 20% during Summer Spaces Sundays, perhaps reflecting the spill over effect of the increased pedestrian activity on Carrall Street.

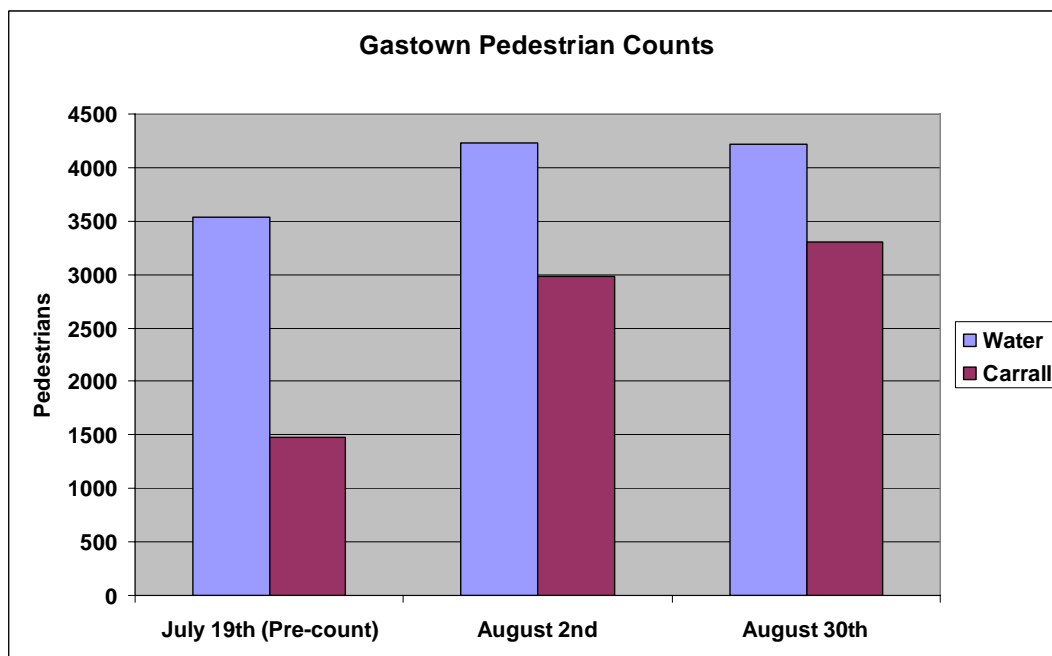


Figure 3: Gastown pedestrian counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

Pedestrian volumes on the closed block of Vanness Avenue in Collingwood increased approximately 130% during the first Summer Spaces Sunday compared to the base count. Equipment failure caused some data loss during the second Summer Spaces count, but it is estimated that volumes declined approximately 25% compared to the first event.

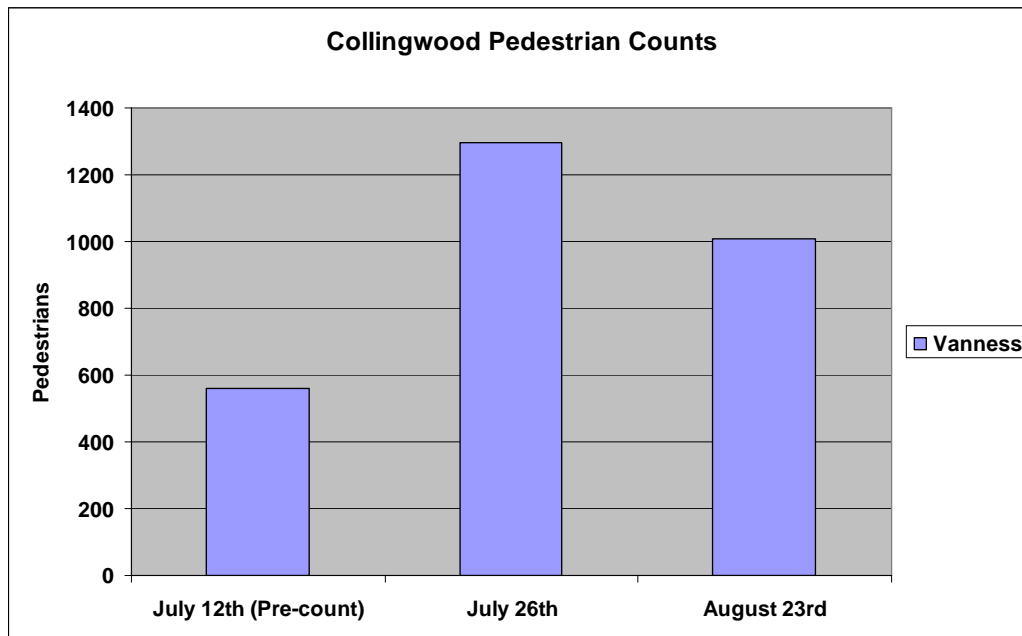


Figure 4: Collingwood pedestrian counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

Analysis of pedestrian counts indicates that volumes tended to decline somewhat over the course of the respective Summer Spaces series, with Gastown being the exception. However, in all locations pedestrian volumes were up significantly during all Summer Spaces Sundays compared to typical Sundays. Changes in pedestrian/cyclist volumes over several recurrences could be caused by many factors, including:

- Weather (hot, rainy, etc.);
- Transportation impacts caused by recurring road closures;
- Competing events/festivals; and,
- Residents being away on vacation.

APPENDIX C: VEHICLE COUNTS

City staff conducted mid-block vehicle counts for four hours on a typical Sunday and two Summer Spaces Sundays, during the hours of the respective series. Due to the early cancellation of the Commercial Drive Summer Spaces, staff were unable to conduct the third vehicle count for this neighbourhood.

Generally, vehicle volumes on local streets in the Collingwood and Commercial Drive neighbourhoods increased substantially on Summer Spaces Sundays, with some exceptions.

During the Collingwood Summer Spaces, volunteers from the Collingwood Neighbourhood House were stationed at Rupert Street and Vanness Avenue to notify motorists that there was a road closure ahead on Vanness to the east. This 'soft closure' allowed local traffic to access the area west of Summer Spaces, while significantly reducing the volume of diverted through-traffic on local streets. Thus, vehicle volumes on McHardy Street near Vanness dropped by approximately 50% on the Summer Spaces Sundays compared to a typical Sunday. However, without a soft closure at Vanness and Joyce Street, volumes on McGeer Street near Vanness increased by approximately 170-230% on the Summer Spaces Sundays.

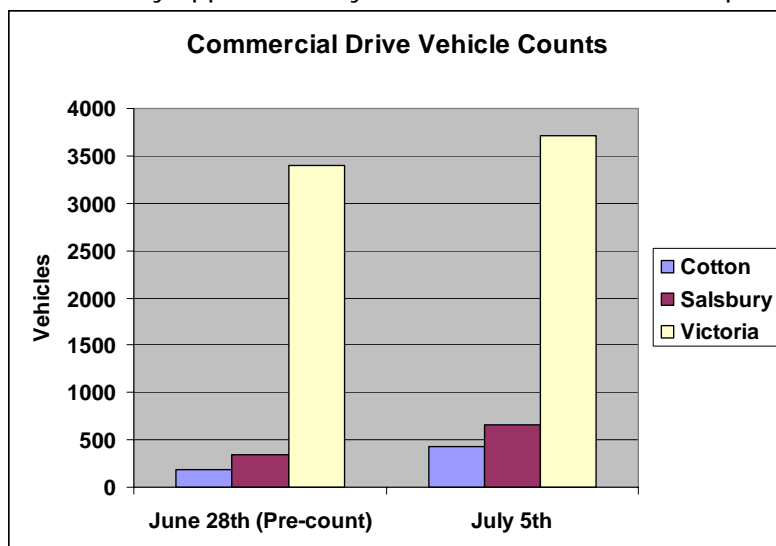


Figure 1: Commercial Drive vehicle counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

In the Commercial Drive neighbourhood, vehicle volumes on two local streets (Cotton and Salsbury) near the road closure increased approximately 100% on the first Summer Spaces Sunday. However, on a nearby secondary arterial, Victoria Drive north of 1st Avenue, volumes only increased 9%. This could indicate that traffic tended to be diverted throughout the local street network in the area as motorists sought access to the closed section of Commercial Drive. However, without the second set of Summer Spaces vehicle counts, it cannot be determined if these changes in volumes held over time.

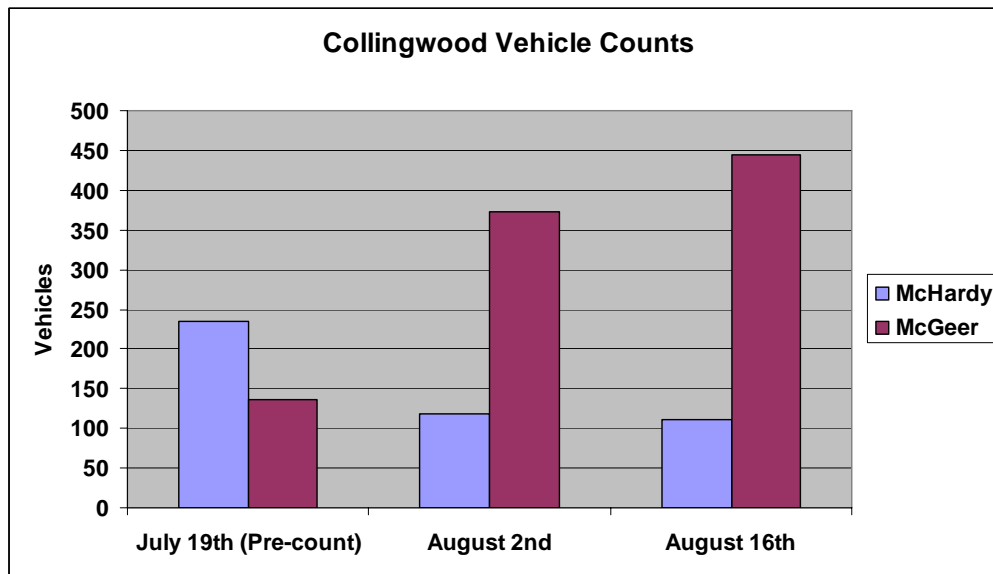


Figure 2: Collingwood vehicle counts.
Source: Summer Spaces 2009 monitoring and evaluation program.

Vehicle counts indicate that recurring road closures can have a considerable impact on neighbourhoods in regards to increased traffic volumes on local streets. Changes in vehicular traffic patterns resulting from a road closure depend on a variety of factors, including:

- The street network in the area;
- Types (soft vs. hard) and locations of road closures;
- Amount of through vs. local traffic carried by the road that is closed;
- The neighbourhood's draw for destination drivers; and,
- Availability of parking.

APPENDIX D: INTERCEPT SURVEY

On select dates, Summer Spaces participants were approached randomly at the trial locations and asked to take part in an intercept survey. A total of 212 surveys were completed for the four trial areas (40 in Gastown, 79 on Commercial Drive, 25 in Collingwood, and 68 on Main Street).

Place of Residence and Transportation Mode Share

Overall, the trial was successful in maintaining the 'local' focus or draw envisioned for the program since the majority of Summer Spaces participants came from each of the local hosting neighbourhoods. As such, it is not surprising to also see that approximately half of those surveyed arrived on foot. Main Street and Commercial Drive appear to have attracted the greatest percentage of local neighbourhood residents, 52% and 60% respectively; whereas, Gastown and Collingwood, drew a slightly lower percentage of local residents: 44% and 48% respectively. Survey results showed that for all four trial areas 48-55% of participants chose to walk, 20-25% of participants chose to drive, and 10-13% chose to take transit to get to the street. In Collingwood, none of those surveyed arrived to the street closure by bicycle; while 11-15% chose cycling for the remaining three areas.

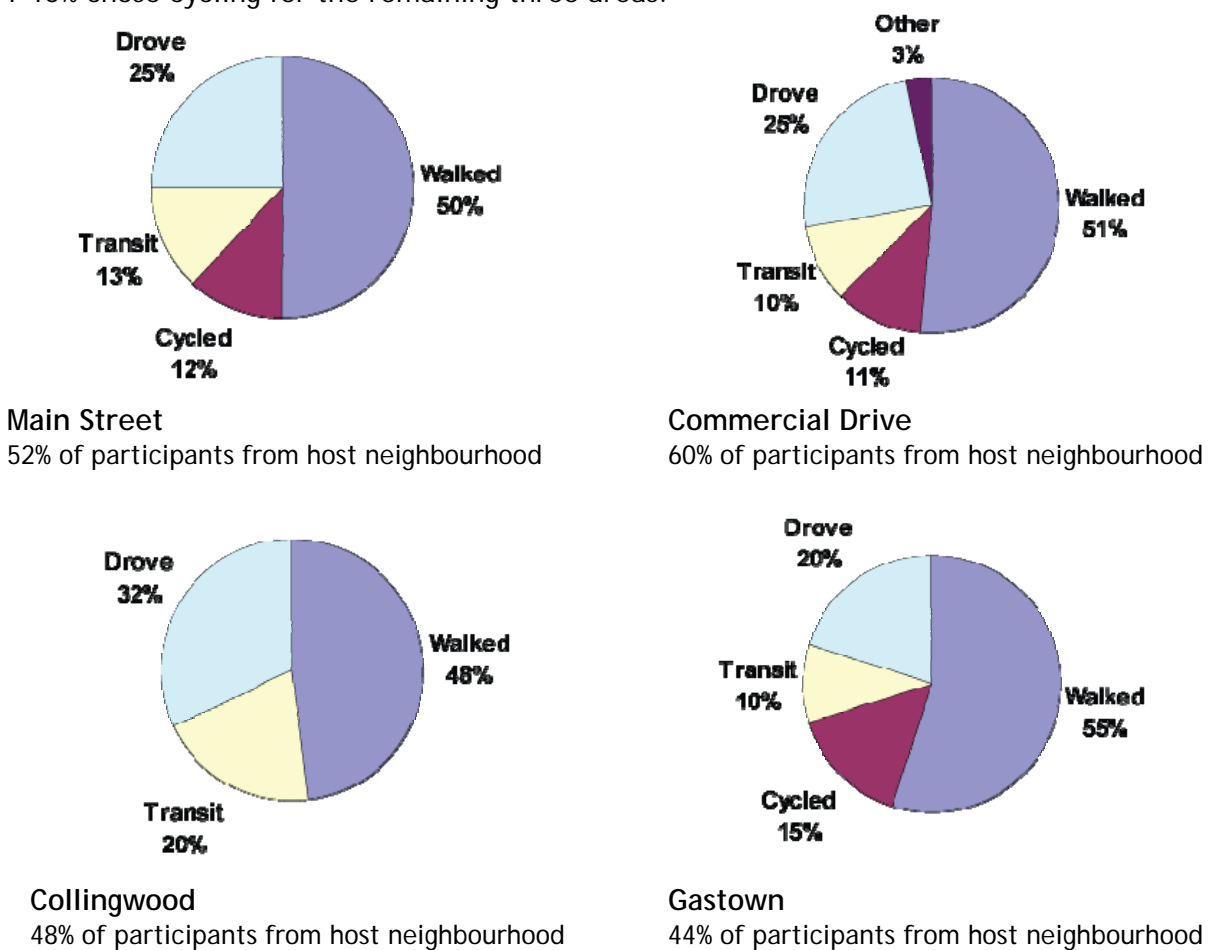


Figure 1: Summer Spaces participants' mode share by neighbourhood.
Source: Summer Spaces 2009 intercept survey.

Main Purpose for Being on the Street

Participants were also asked what their primary reason was for coming to the street that day. On the non-commercial street trial location (Collingwood), 64% of respondents said they were on the street specifically to visit Summer Spaces. For the trials occurring along commercial streets, the primary purpose for why people visited the street was more varied: an average of 27% indicated no specific destination - they were just out for a walk, an average of 22% came specifically to visit Summer Spaces and, an average of 15% said they were primarily there to shop. Commercial streets appear to act as a natural draw within a community, attracting people for a variety of reasons.

	Main St	Commercial Dr.	Gastown	Collingwood
a. To shop	16%	16%	13%	0%
b. To work	7%	2%	10%	8%
c. To visit Summer Spaces	19%	28%	20%	64%
d. To eat at a restaurant/café	9%	8%	10%	0%
e. No specific destination; just a walk	24%	28%	30%	0%
f. Other	25%	18%	18%	28%

Table 1: Summer Spaces participants identified their main purpose for coming to the street. Source: Summer Spaces 2009 intercept survey.

Amount of Time Spent on the Street

One way to gauge the relative potential for community interaction at each Summer Spaces series is to measure the amount of time a participant chooses to spend at a particular location. In Gastown, 73% of respondents reported spending less than one hour at the farmers market; where as, 95% of Commercial Drive participants reported spending one to two hours or more than two hours at the closure.

	Main St.	Commercial Dr.	Gastown	Collingwood
Less than 1 hour	38%	4%	73%	32%
Between 1-2 hours	41%	51%	13%	24%
More than 2 hours	21%	44%	10%	44%

Table 2: Amount of time participants reported spending at Summer Spaces by neighbourhood. Source: Summer Spaces 2009 intercept survey.

Promotion/Communications

When asked how they learned about Summer Spaces, the majority of respondents chose either 'word of mouth' or 'other' from the list of options available, which also included posters, rack cards, the newspaper or, online sources. This shows that any future communications plan will need to better exploit the untapped potential of these latter options.

Shopping

Participant shopping behaviour was not consistent across the three commercial sites. Surveyors asked participants whether or not they had spent any money while attending the street closure. Results from Commercial Drive show that 76% of those asked had made a purchase while attending the closure. Both Gastown and Main Street, however, show that only 47% of participants had made a purchase.

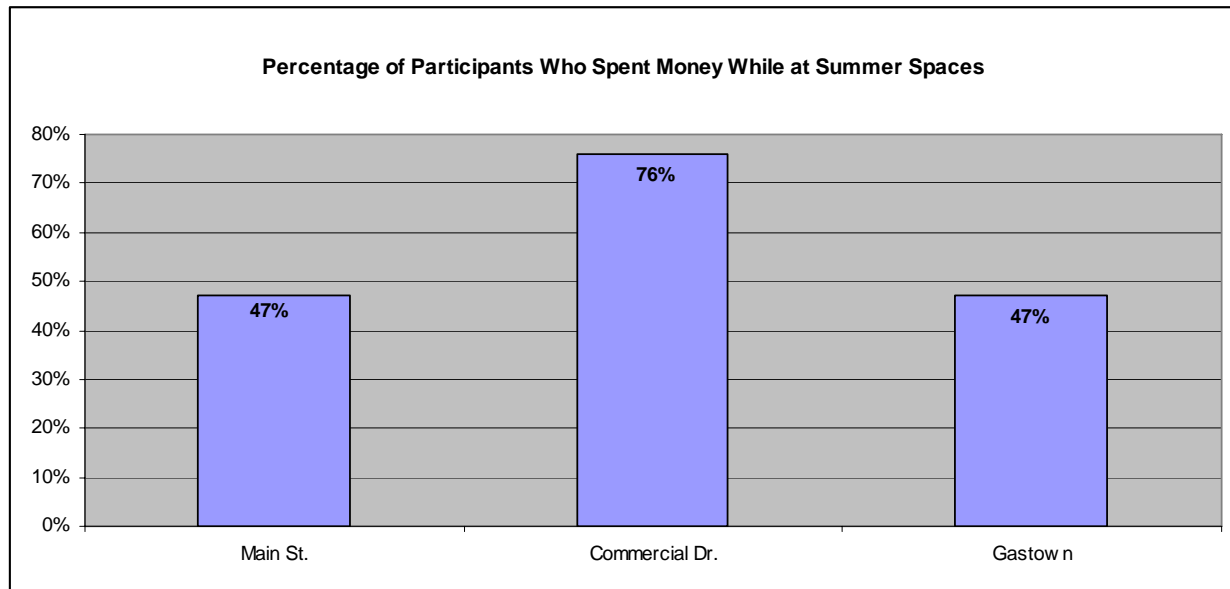


Figure 2: Percentage of participant respondents who reported spending money at Summer Spaces by neighbourhood.

Source: Summer Spaces 2009 intercept survey.

Intercept Survey by the Mount Pleasant BIA

In addition to the City's intercept survey, the MPBIA conducted its own intercept survey during their Summer Spaces series with the help of local volunteers. A total of 89 surveys were completed. Fifty-one percent of respondents identified spending time on the street with people and getting to know their neighbours better as the most enjoyable part of their Summer Spaces experience.

APPENDIX E: RESIDENT SURVEY

A survey targeting residents living in close proximity to the four Summer Spaces locations was delivered to 14,662 households in early September using Canada Post. Staff received a total 1,411 hardcopy and online responses: 103 from Gastown, 125 from Collingwood, 388 from Main Street, and 441 from Commercial Drive; 354 of surveys were returned without the respondent’s neighbourhood identified.

Resident Support of the Initiative

Survey results reveal a high level of resident support for this car free initiative. When asked to indicate level of support for the pilot program’s goals, overall, 67% indicated strong support and 19% indicated being somewhat supportive. Thirteen percent indicated not supporting the program’s goals. Respondents were also asked whether or not they supported having their neighbourhood host a future Summer Spaces series. ‘Yes’ responses from the four areas ranged from 74-90%. In addition, the survey asked residents to indicate whether or not they supported the City continuing to further refine its Summer Spaces program: 81% percent of respondents answered yes.

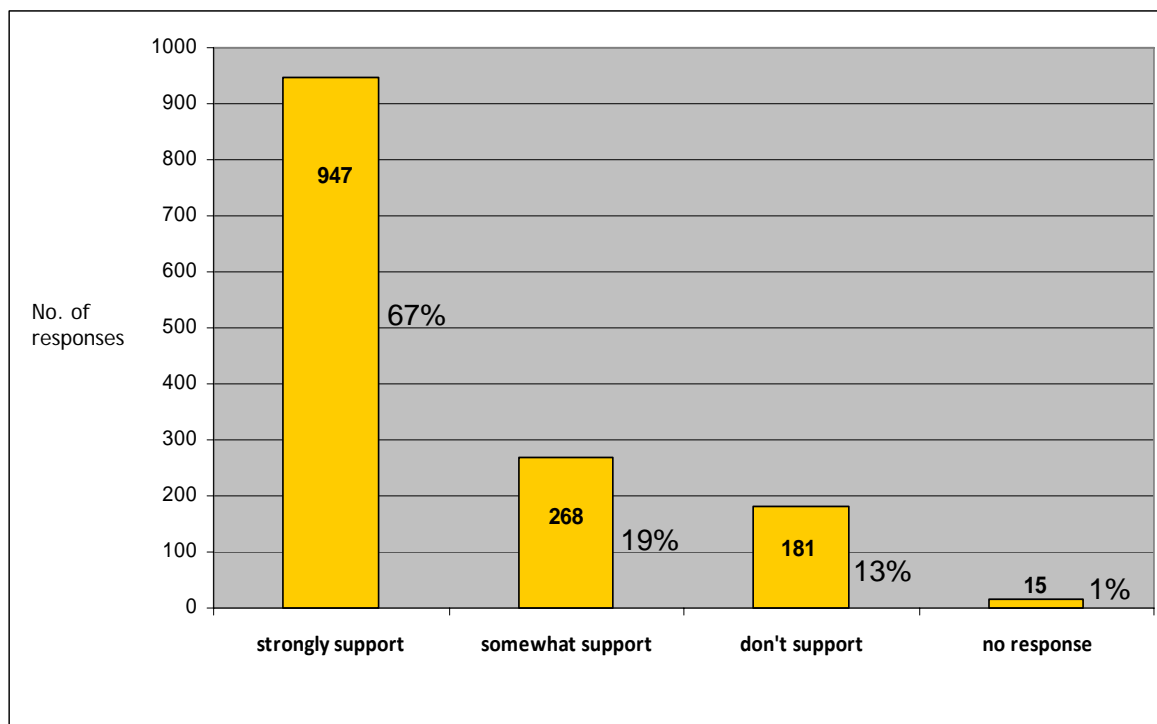


Figure 1: Resident responses indicating level of support for the goals of the Summer Spaces trial. Source: Summer Spaces 2009 Resident Survey.

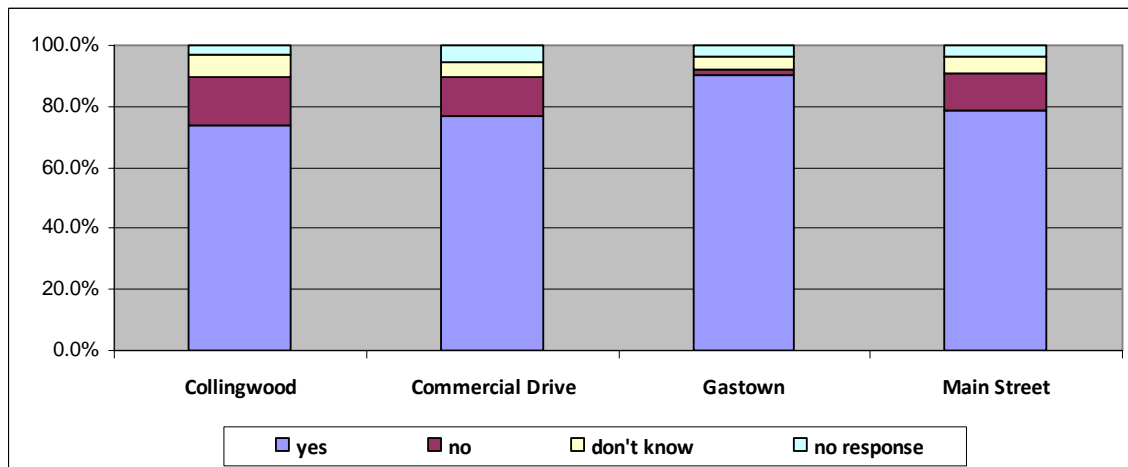


Figure 2: Resident responses, by neighbourhood, indicating level of support for having their neighbourhood continue to host Summer Spaces in the future.
Source: Summer Spaces 2009 Resident Survey.

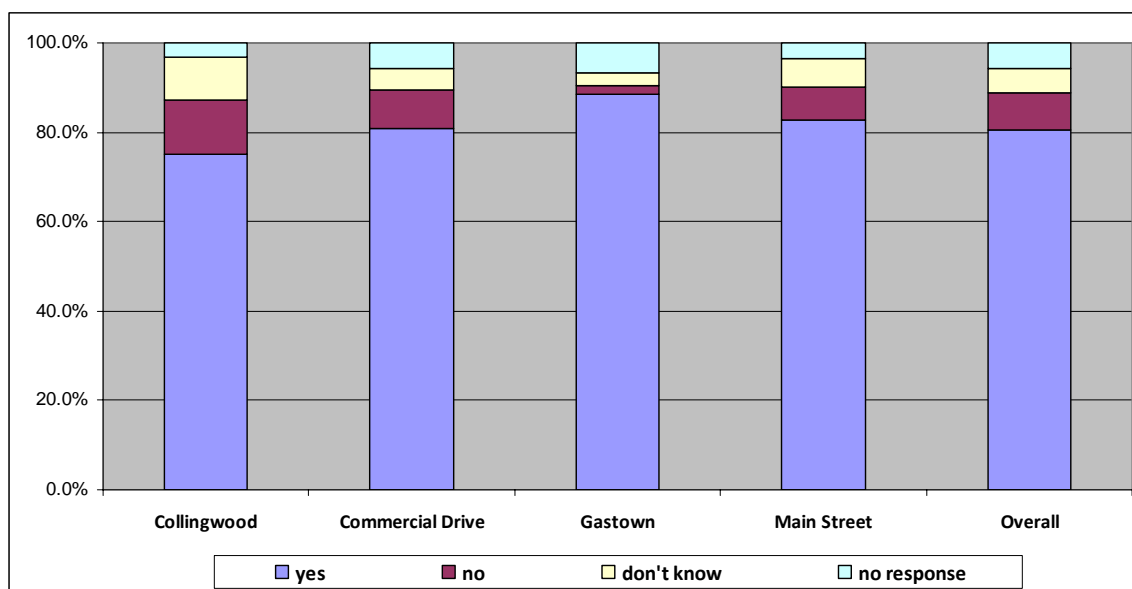


Figure 3: Resident responses, by neighbourhood, indicating level of support for City continuing to refine the Summer Spaces Program.
Source: Summer Spaces 2009 Resident Survey.

Resident Awareness of the Initiative

Overall, 84% of respondents were aware that their neighbourhood was host to a Summer Spaces series, representing a solid foundation upon which any future promotions could build, noting that responses from all four areas identified a need for improved advertising and promotions. Neighbourhood specific responses for awareness were between 68% and 91% with Collingwood represented by the former and Commercial Drive by the latter rate. This finding is interesting given that Summer Spaces along Commercial Drive had the smallest number of recurrences compared to the other three areas. This high level of resident awareness is likely due to a combination of factors: the location of the series along a commercial vs. non commercial street, the scale of the closure (it was the largest of all the trial areas) and, the

fact that the location remained the same, week after week, and did not rotate along different sections of the street. As well, media attention garnered by the early cancellation of the series in late July may have also contributed to increased awareness of the series.

Impact on Residents

Staff recognize that street closures for pedestrian use may result in increased noise and vehicle traffic on residential streets as well as reduced resident access to public transit and local area merchants. Although, overall, residents indicated relatively low levels of significant impacts within these four categories, increased vehicle traffic on side streets and access to transit ranked as the first and second areas of concern. When asked to identify any other impact areas, residents often indicated reduced access to parking as an issue. The *ability to shop* in the neighbourhood was the area of least impact, overall, with 70% indicating no impact at all. Results also reveal that the *regular shopping habits* of the majority of residents in each of the four neighbourhoods remained the same during Summer Spaces. However, results for specific areas show that the neighbourhood with the highest percentage of residents claiming to have shopped *less than usual* was Commercial Drive (25%); while the area home to the highest percentage shopping *more than usual* was Gastown (44%).

Aspects of Each Summer Spaces Series

1) Location, Hours, Day of the Week and Scale

Survey respondents were asked to indicate their preference for select aspects of the Summer Spaces series hosted by their community. Results from all four areas show that the majority of residents generally prefer not to see any changes to the location, hours, day of the week and scale of their community series; noting however, that a higher percentage of residents from Gastown and Collingwood would like to see the hours of their respective series adjusted compared to the other two areas. As well, a higher percentage of residents from Collingwood indicated a preference for a different location compared to the other three areas.

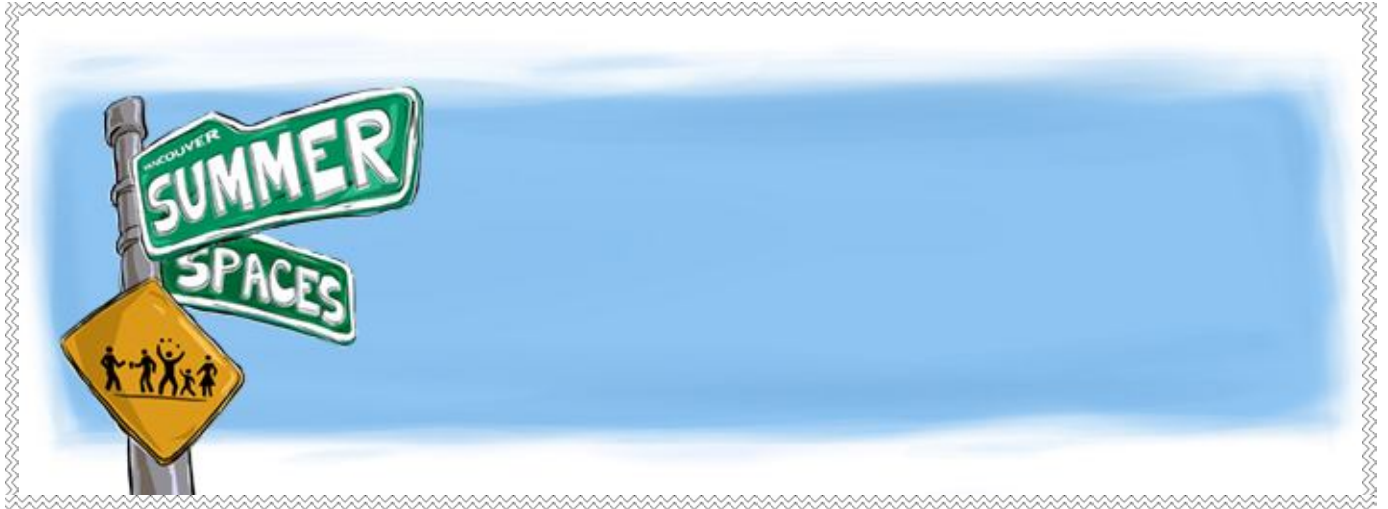
2) On-site Activities and Total Number of Street Closures

The results for the two categories 'on-site activities' and 'number of street closures per series' are important to note because the ratio of residents wishing to keep the current approach vs. those wanting a change, shifted considerably when compared to the four categories above.

Between 30-35% of residents in all four areas indicated a desire to have on-site activities approached differently. Comments relating to stronger themes, more engaging activities and an improved festival atmosphere were common, particularly for the Commercial Drive and Main Street areas. A third of residents from the Main Street and the Collingwood areas indicated a preference for change to the total number of street closures in their respective series. This desire for change is even more pronounced at nearly 50% in the Commercial Drive and Gastown areas. The majority of these Gastown respondents indicated a strong desire to see more farmers market closures throughout the summer while the results for Commercial Drive revealed a mix for both fewer and a greater number of closures.

- *APPENDIX F: RETAIL COMMERCIAL IMPACT STUDY FROM HUME CONSULTING*

SUMMER SPACES
RETAIL – COMMERCIAL IMPACT STUDY



SUBMITTED TO:
CITY OF VANCOUVER

SUBMITTED BY:
HUME CONSULTING CORPORATION

NOVEMBER 2009

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SUMMER SPACES

RETAIL – COMMERCIAL STUDY

1.0 EXECUTIVE SUMMARY

STUDY MANDATE and OBJECTIVES

On June 2, 2009 City Council approved Summer Spaces, a trial program for recurring car-free Sundays during the summer of 2009 in four neighbourhoods including three commercial streets and one residential street near a SkyTrain station- The three commercial streets were Commercial Drive, Gastown, and Main Street.

The emphasis of the recurring Summer Spaces was to create a temporary “public space” akin to a pedestrian plaza rather than a “special event” (such as the one day Car-Free Day festival or the one day Greek Day festival) to be accessed by the local neighbourhood primarily via non-motorized transportation. The scale and focus of Summer Spaces was intended to be local and with a minimal level of required resources. Much of the planning and programming of the type and level of street activities were generally left to initiative of local business and community groups.

As the trial Summer Spaces initiative was expected to provide a valuable opportunity to learn from experience, Council approved a monitoring and evaluation program in conjunction with the initiative. Evaluation and data analysis were to be used to help enhance the success of future Summer Spaces initiatives by gauging impacts (both positive and negative) as well as identifying issues and concerns.

Hume Consulting Corporation was retained by the City of Vancouver to complete the Retail-Commercial Impact Study, which was one component of the monitoring and evaluation program.

The primary objectives of the retail-commercial impact study, as set out in the Terms of Reference are:

- Understanding the impacts (particularly business sales impacts) on different types of businesses related to Summer Spaces days*
- Determining how the element of recurring Summer Spaces days affected pedestrian traffic and sales*
- To assess how the unique locational and market characteristics of each commercial area may have affected the outcomes for Summer Spaces*

NEIGHBOURHOOD ASSESSMENTS and COMPARISONS

The review, comparison, and assessment of each commercial area in terms of the neighbourhood and business mix revealed that there are specific demographic and business characteristics that could have implications regarding the success of Summer Spaces and the impact on businesses.

- *Neighbourhoods with a higher proportion of young families with children at home are more likely to attend Summer Spaces as parents are always seeking safe, fun places and events where they can take their children.*
- *Neighbourhoods with a higher proportion of young adults are more likely to generate traffic for Summer Spaces as young adults tend to be out-going and adventurous and more willing/able to walk to an event in their neighbourhood.*
- *Higher density neighbourhoods where there is a large population living within a convenient walking distance are more likely to generate strong local pedestrian traffic.*
- *Those commercial areas with a strong business mix primarily oriented toward serving the local neighbourhood area rather than a regional population base are likely to have fewer negative sales impacts compared to commercial areas that rely more heavily on customers coming (by automobile or transit) from a wider regional area.*
- *Areas with a business mix containing a large number of unique specialty stores (i.e., gifts, crafts, home décor, health & beauty products, and fashion accessories) are more likely to attract potential shoppers and benefit from increased customer traffic and sales because they tend to generate shopping interest and exploration as well as attract impulse purchases. However, those specialty stores that rely heavily on shopping visits from outside the local area may be negatively impacted by the street closures and reduced parking.*
- *Commercial areas with a good selection of cafes, restaurants, and specialty/impulse foods (e.g. ice cream/gelato, cookies/muffins, candies/chocolates) help provide an environment where Summer Spaces visitors can eat, rest/relax, socialize, and/or meet a friend. Many of these businesses are well-positioned to benefit from increased sales during Summer Spaces.*
- *Commercial areas that offer parking alternatives in close proximity to the Summer Spaces event may better accommodate local customers that normally drive to their local commercial area as well as regular/occasional customers arriving by car from outside the local neighbourhood.*
- *Negative impacts on businesses may be reduced where a street closure is not along a transit line and other modes of access are not affected. For example, the Gastown Summer Spaces occurred on a one-block stretch of Carrall Street with no transit lines.*
- *The greater the distance of any transit diversion and the fewer convenient alternative transit options, the more that business accessibility is reduced and the greater the potential negative impact on businesses. For example, transit along Commercial Drive was diverted four blocks west to*

Clark Drive and there are no transit routes crossing the Commercial Drive Summer Spaces area thereby reducing convenient transit accessibility and potential business.

RETAIL COMMERCIAL IMPACT SURVEY FINDINGS

The survey was designed to ask a series of related questions that would enable businesses to portray a relatively complete picture of the impacts that they experienced and as well provide their comments and recommendations. It should be emphasized that each Summer Spaces series was substantially different, in terms of programming and activities, in each of the three commercial areas resulting in some variation in the experience offered to participants.

The Retail-Commercial Impact Survey provided answers to several key questions needed to evaluate the Summer Spaces initiative including:

1. Did Summer Spaces generate more pedestrian traffic in the area?

The Pedestrian Counts provide clear evidence that Summer Spaces did generate significant pedestrian traffic within the each street closure area that was well above “normal” levels measured the Sunday before the first day.

The Commercial Drive area experienced the largest numerical increase in pedestrian traffic compared to a typical Sunday, although Main Street had the greatest percentage increase in pedestrian traffic. The significant residential densities near Commercial Drive and Main Street likely contributed to the strong increases in pedestrian traffic. Pedestrian counts in the vicinity of the Farmers Market in Gastown area were up significantly in percentage terms although the actual traffic counts were quite low compared to Main Street and Commercial Drive.

2. How did Summer Spaces impact business sales?

The reported business sales impacts related to Summer Spaces were highly variable for each area and among various business categories. The increased pedestrian traffic did not translate into increased customer traffic for the majority of businesses responding to the survey. When asked if the customer traffic entering their business increased, 45% said customer traffic was much less or slightly less into their business, 34% said customer traffic stayed about the same, and 20% indicated much more or slightly more customer traffic.

Overall, more businesses reported that their sales decreased (43%) than a sales increase (21%). Just over 33% of respondents reported no noticeable impact on sales. More businesses reported a decrease in sales as the Summer Spaces days progressed.

A variety of businesses did experience increased customer traffic and sales due to Summer Spaces and were pleased with the increased pedestrian traffic in the area. Some businesses appear to have benefited from Summer Spaces by setting up special tables/displays, offering special merchandise or pricing, or providing entertainment outside their store.

3. How did the frequency of Summer Spaces affect regular customers and business?

City Council intended that Summer Spaces be conceived as a series of recurring Sunday closures over the course of the summer months, in order to build neighbourhood awareness and support of the program. Summer Spaces certainly achieved higher than normal pedestrian counts during Summer Spaces days. However, the element of recurrence does not appear to have generated a progressive increase in pedestrian traffic, customer visits, or business sales week over week.

A number of comments were received from businesses in both the Commercial Drive and Main Street areas indicating that many of their regular customers were frustrated by the traffic congestion and inconvenience created by Summer Spaces and avoided the area as a result.

With many businesses relying on shopping traffic from outside the local area, particularly on weekends, concern was expressed that the significant business losses due to traffic disruptions were compounded by the repeated street closures over consecutive Sundays with potential permanent loss of customers if the closures cause customers to change their shopping patterns.

4. How do businesses feel about Summer Spaces location, time of day, and programming/activities

While the creation of another “festival” event was not a goal of Summer Spaces, there was an expectation by many businesses that Summer Spaces would be another highly programmed event or festival. Viewed in the context of the many well-established festivals and events that already take place in their commercial areas and around Vancouver, many businesses expressed frustration/disappointment with Summer Spaces in terms of the level of planning, programming, advertising, etc.

5. How could Summer Spaces be improved?

The **recommendations** most commonly expressed by businesses were:

- Reduce the frequency of Summer Spaces to once per month or one event per year or stop the program entirely
- Make some provision for temporary vehicular parking and access to attract/satisfy customers

- *Improve the planning and organization of Summer Spaces*
- *Increase the amount of programming and street activities to better engage the public*
- *Provide an emphasis on family-oriented activities and entertainment*
- *Summer Spaces should have a clear theme and become more of a festival event like other successful events held in Vancouver during the year*

RETAIL-COMMERCIAL IMPACT SURVEY CONCLUSIONS

- *Summer Spaces was a success in terms of generating pedestrian traffic in each of the three commercial areas reviewed. The responses to the Impact Survey indicate that the Summer Spaces initiative was highly mixed in terms of its impacts on businesses.*
- *The increased pedestrian traffic in each area provides a strong indication of public interest in participating in on-street pedestrian experiences and Summer Spaces did generate significant pedestrian activity.*
- *Increased pedestrian traffic should provide an opportunity for businesses to convert this traffic into customer sales, however increased customer traffic and sales were not realized for many businesses. Therefore, new strategies should be considered by all stakeholders to help ensure that more businesses benefit from Summer Spaces in the future.*
- *Intercept surveys conducted during Summer Spaces indicate that many of the participants were from the local neighbourhood thereby achieving a Summer Spaces goal of creating a new public open space where neighbours could meet and interact.*
- *While recurring instances of Summer Spaces may have furthered public awareness and support for Summer Spaces, the element of recurrence did not generate week over week increases in pedestrian counts in the Commercial Drive and Main Street areas. Pedestrian traffic remained well above pre-event levels but did decrease in the Commercial Drive and Main Street areas on subsequent Sundays when counts were taken. Pedestrian traffic levels along Carrall Street in Gastown increased over time compared to the first day of the Farmer's Market.*
- *Some Retail-Commercial Impact Survey respondents indicated that there was insufficient programming and activities to generate new or recurring visits. Responses also suggest that the novelty of Summer Spaces was diluted by having recurring events over several weekends. These comments from businesses are reflective of an expectation that Summer Spaces should be (or*

become) more of a destination, festival-type event similar to other major events held throughout Vancouver.

- *The goal of creating a successful community event/program, with limited resources and programming provided by the City, was at least partially realized. The organization and programming of local activities and events to attract and engage participants was largely left to the local BIA, community groups, and/or local businesses. As a result, the type and level of organization and programming in each area was variable. Many of the business survey respondents expressed that there was not enough local programming to engage participants or encourage return visits.*
- *The goal of helping to support local businesses by generating increased local traffic and awareness was not met according to the majority of business survey respondents. While many businesses acknowledged that there was increased pedestrian traffic on Summer Spaces days, there were many businesses indicating that they either lost regular customers and sales or noticed no change due to Summer Spaces.*
- *From a business perspective, many of the surveys indicate that this additional pedestrian traffic did not translate into new or additional business sales and in many cases businesses suffered significant sales losses or additional costs (i.e., extra staff, promotional costs) that they did not recover.*
- *The relatively short time available to plan and organize the Summer Spaces days reportedly contributed to some of its shortcomings. It is important to recognize that this was the first time that Summer Spaces days was attempted. Like most “first attempts” there were both anticipated and unanticipated successes and shortcomings. Lessons can be learned and improvements can be made.*

Summer Spaces is a unique on-street event and was very successful in achieving its primary goal - it generated significant additional pedestrian/non-automotive traffic in each commercial area where it was located and it created an environment where the community could meet and interact. Building on these positive outcomes, it is reasonable to expect that improvements can be made to Summer Spaces, and efforts made to encourage more active participation/cooperation of businesses to help ensure that they can benefit from possible Summer Spaces days in the future.

REPORT RECOMMENDATIONS

Based on the findings summarized in this report, there a number of broad recommendations intended to help improve possible Summer Spaces days and its impact on businesses for all areas in the future.

Goals and Objectives

Comments received indicate that the purpose and vision of Summer Spaces need to be reviewed, clarified, and communicated to all community stakeholders.

Planning and Organizational Considerations

The City did not have a detailed Summer Spaces program or take an active role in the planning and programming of Summer Spaces for each commercial area. As a result, the level of organization, planning, programming and activities was significantly different for each area with mixed results.

- The role of the City in the planning and organization of Summer Spaces should be reviewed. Given the new information generated by the evaluation and monitoring program, the City will now be in the best position to identify how Summer Spaces can be more successful in the future.

Locational Considerations

Based on an assessment of each Summer Spaces commercial area and the results of the Impact Survey, there are a number of locational characteristics that should be considered in selecting future locations for Summer Spaces.

- Summer Spaces should be staged within or near commercial precincts that are well-established in the community in terms of role, awareness, and usage.
- Preference should be given to established commercial streets or precincts with a strong mix of neighbourhood-oriented stores and local shopping traffic
- Summer Spaces is likely to be most successful when located in higher density neighbourhoods where there are larger numbers of residents living nearby that can conveniently walk to one of the street closures
- Preference should be given to neighbourhoods with one or more of the following characteristics: a higher proportion of families with young children at home; higher than average incomes; a higher proportion of young adults aged 19-44 years.

Event Frequency

The responses from the Retail-Commercial Impact Survey provide a strong indication that the frequency of Summer Spaces was considered too high for many businesses in the Main Street and Commercial Drive areas.

Once appropriate changes/improvements to Summer Spaces have been made, the program may be implemented on a less frequent basis at least until such time as the event becomes established and successful for the majority of businesses.

Programming & Activities

Now that the initial “trial run” has been completed, the successes, impacts, and possible improvements are better understood. The City should consider taking a more active role in identifying and supporting the level and type of programming/activities to help ensure the success of Summer Spaces rather than leaving it entirely to each local BIA or community.

Access & Parking

Careful (re)consideration is needed regarding both access and parking. Many businesses expressed that they are dependent on vehicular access from both within and outside the local neighbourhood. Lost customers and business were cited as a key impact of the Summer Spaces street closures in the Commercial Drive and Main Street areas.

Infrastructure

Comments received from the Impact Survey and BIA meetings indicate that there was inadequate infrastructure for Summer Spaces. Some of the infrastructure needs that should be reviewed and planned for include:

- *adequate customer parking areas and possibly shuttles to/from these areas*
- *more convenient access provision for those using public transit*
- *adequate promotional and directional signage*
- *provision of public restrooms*
- *provisions for garbage disposal, recycling, and pick-up*
- *public security particularly where alcoholic beverages may be served*
- *reducing visual impact of engineering street barriers*

2.0 STUDY BACKGROUND AND MANDATE

The general background and mandate for this study has been set out in the Terms of Reference for the “Summer Spaces Retail-Commercial Study” and is briefly summarized as follows:

On June 2, 2009 City Council approved Summer Spaces, a trial program for recurring car-free Sundays during the summer of 2009 in four neighbourhoods including three commercial streets and one residential street near a SkyTrain station. The three commercial streets were:

- **Commercial Drive** – Up to 7 temporary street closures were planned between Venables and E. 1st Avenue. Four temporary street closures, between 12:00 pm and 6:00 pm were completed on consecutive weekends in July before the program was terminated at the request of the Commercial Drive BIA in response to input from businesses.
- **Gastown** – a temporary one-block closure of Carrall Street, between Water Street and Cordova Street, was completed on 9 consecutive Sundays through August and September between 11:00 am and 3:00 pm. The Gastown trial featured a Farmer’s Market on Carrall Street.
- **Main Street** – a total of 6 temporary street closures were completed along three sections of Main Street between 12:00 pm and 5:00 pm during July and August. The street closures were staged with a temporary closure between 7th Avenue and Broadway occurring on the first Sunday, a closure between Broadway and 12th Avenue occurring on the next Sunday, and a closure between 12th Avenue and 16th Avenue occurring on the third Sunday. After a two week break, the temporary closures shifted back to the blocks between 7th Avenue and Broadway on the 4th Sunday and shifted progressively south on the following two Sundays.

The emphasis of the recurring Summer Spaces was to create a temporary “public space” akin to a pedestrian plaza rather than a “special event” (such as the one day Car-Free Day festival or the one day Greek Day festival) to be accessed by the local neighbourhood primarily via non-motorized transportation. The scale and focus of Summer Spaces was intended to be local and with a minimal level of required resources. Much of the planning and programming of the type and level of street activities were generally left to initiative of local business and community groups.

As the trial Summer Spaces initiative was expected to provide a valuable opportunity to learn from experience, Council approved a monitoring and evaluation program in conjunction with the initiative. Evaluation and data analysis were to be used to help enhance the success of future Summer Spaces initiatives by gauging impacts (both positive and negative) as well as identifying issues and concerns.

The overall monitoring and evaluation program included five components:

1. Vehicle Counts on residential streets
2. Pedestrian and Bicycle Counts
3. Summer Spaces user intercept surveys
4. Local resident surveys
5. Retail-Commercial Impact Study

The first four components of the monitoring and evaluation program were completed by City Staff. Hume Consulting Corporation was retained by the City of Vancouver to complete The Retail-Commercial Impact Study, which is the final component of the monitoring and evaluation program.

3.0 STUDY OBJECTIVES, APPROACH, AND METHODOLOGY

Identification of the study objectives, methodology and its implementation were established with the close participation and coordination of City Staff. Several meetings were held between the Consultant and Staff to discuss and refine the Terms of Reference for the study including the objectives and methodology.

The primary objectives of the retail-commercial impact study, as set out in the Terms of Reference are:

- Understanding the impacts (particularly business sales impacts) on different types of businesses related to Summer Spaces days
- Determining how the element of recurring Summer Spaces days affected pedestrian traffic and sales
- To assess how the unique locational and market characteristics of each commercial area may have affected the outcomes for Summer Spaces

Hume Consulting, in consultation with Staff, developed a detailed study methodology to achieve these objectives. The study approach involved new primary research as well as a review of other sources of data and feedback related to Summer Spaces. It was not the mandate of this report to make specific recommendations regarding the possible continuation of Summer Spaces days in the future. This report reviews several sources of information needed to assess and evaluate the impacts of Summer Spaces. Based on an evaluation of the information and data, this report does present various conclusions regarding the retail-commercial impact of Summer Spaces, and makes recommendations regarding how the program may be improved if continued in the future.

The specific study components and methodology include:

Business Survey - A detailed business survey was prepared and distributed to all businesses located within the boundaries of the Summer Spaces street closures. The survey boundaries were expanded to include businesses located one block beyond the street closure in each direction in order to obtain some representative information regarding the business impacts of Summer Spaces immediately outside the street closure area. The survey included questions regarding a range of possible Summer Spaces impacts as well as questions regarding possible future changes and improvements to Summer Spaces.

Neighbourhood Assessments and Comparisons – A general description and demographic profile of each neighbourhood area was prepared. Most of the statistical information cited was derived from the BizMap Community profiles produced by the Vancouver Economic Development Commission

(www.bizmapbc.com). The profiles include a general description of the locational attributes of each area (accessibility, traffic volumes), the age profile and ethnic composition of the residential population, average household income levels, the level of home ownership, and housing structure (i.e., apartments, detached, semi-detached). Each neighbourhood was assessed and compared as to how its unique characteristics might affect the Summer Spaces program.

Business Mix Assessment and Comparisons – Hume Consulting conducted a walking inventory of all businesses located in each of the three commercial areas. The type of each business was noted and categorized. These inventories provided a means to compare the business mix in the three commercial areas. During the inventory process, Hume Consulting also noted the general character (i.e., location, accessibility, vibrancy, traffic, general quality of businesses, vacancies, new development activity) of each commercial area. The business mix and business character for each commercial area was assessed and compared as to how its unique characteristics might affect the Summer Spaces program.

BIA Meetings and Business Feedback – Hume Consulting attended several BIA meetings where the impacts of Summer Spaces were discussed. Detailed notes were kept of the comments, concerns, and recommendations expressed by BIA business members. In some cases, the BIAs conducted their own surveys of their members regarding Summer Spaces. The results of these surveys are reviewed and discussed in this report, and also reflected in the report's overall conclusions and recommendations.

Review/Assessment of Other Monitoring and Evaluation Tools – Hume Consulting reviewed the findings of the other four components (referenced on page 5) of the monitoring and evaluation program. A review of findings from these other monitoring/evaluation components was undertaken to inform the retail-commercial impact study, particularly this report's overall conclusions and recommendations.

4.0 NEIGHBOURHOOD PROFILES AND COMPARISONS

One of the central purposes of this report is to evaluate the impact of the Summer Spaces program within portions of three separate and distinct commercial areas – Gastown, Commercial Drive, and Main Street (Mount Pleasant). Unique locational market characteristics in each of the three commercial areas, were considered in terms of their potential influence on business success or impact during the Summer Spaces program.

Each of the three Summer Spaces commercial areas have been reviewed, assessed, and compared in terms of their locational, neighbourhood, and business-mix characteristics. Much of the comparative demographic data has been obtained from the recently updated BizMap Market Area Profiles (2009), produced by the Vancouver Economic Development Commission. Based upon this review, the report discusses the possible influence or implications of the unique locational and market characteristics on the Summer Spaces program in relation to its business impacts.

4.1 NEIGHBOURHOOD AND BUSINESS CHARACTER

4.1.1 Main Street/Mount Pleasant BIA

Mount Pleasant is a mature Vancouver neighbourhood that is centrally located and in relatively close proximity to the Downtown. Mount Pleasant is highly accessible within Vancouver and the Metropolitan region due to the presence of several major traffic arterials that serve the community including Main Street, Broadway, and 12th Avenue. Main Street is the central north/south commercial spine through this neighbourhood with Broadway and 12th Avenue being major east/west arterials. All three of these major roads serve both local and regional traffic and are very busy during Vancouver's peak traffic hours. Average weekday traffic volumes along Main Street (between 7th Avenue and 21st Avenue) range between 22,000-30,000 vehicles. Mount Pleasant is also well served by bus routes along these major roads. The #9 and 99 B-Line buses run along Broadway, and the #3 bus runs along Main Street.

MOUNT PLEASANT AREA	
DAILY TRAFFIC VOLUMES (2006)	
Location	Vehicles Per Day
2300 Main Street @	22,101
3700 Main Street @	30,660
100 W. Broadway @	33,492
200 E. 12th Avenue @	40,277

Mount Pleasant is comprised of a wide mix of land uses including office commercial, warehouse/light industrial, retail commercial, single family residential, and multi-family residential. Mount Pleasant is

located just to the south of commercial warehouse and industrial districts located generally north of Broadway. Commercial uses are found primarily along the major roads (i.e., Main Street, Broadway, Kingsway, and 12th Avenue) that serve the community. Medium density rental apartments are generally concentrated within one to two blocks of these major roads and are comprised mainly of older low rise (3-4 storeys) rental apartments. This neighbourhood is undergoing some significant change in terms of its demographic composition, rezoning and development/redevelopment activity (including office, retail, residential, and mixed-use), particularly along the Main Street corridor. Located just to the south of Vancouver's downtown, the BizMap Neighbourhood Profile suggests that the Mount Pleasant area is attracting a younger demographic that are contributing to new residential and mixed-use development. This changing demographic can be expected to increase both average house prices and average household income levels in the area.

The business character along Main Street is mixed. Older commercial and mixed-use buildings dominate the street front, including a significant number of heritage buildings and character storefronts, which have contributed to the area's overall appeal and continuing revitalization. While some properties continue to detract from the area's appeal, their gradual enhancement through development/redevelopment activity is improving the quality and character of the commercial area. There are a wide variety of business types offering a broad selection of choices for both local area residents and residents from outside the neighbourhood. The basic goods and service needs of local area residents are well served by the business mix that includes supermarket and drugstore anchors, a number of smaller produce/grocery stores, several specialty food stores, and a wide range of personal and professional services.

The Main Street commercial area has also established a broader market appeal due to the number and variety of specialty merchandise, furniture/home furnishings, and clothing/accessory stores. The large number of full service restaurants, fast food operators, and cafes also act as a strong draw for both local and non-local residents and help generate vibrancy to the area. Several new popular restaurants and cafés have opened over the past few years, improving the business character of the area.

The business mix, pedestrian activity and overall commercial vibrancy generally appears to improve moving south between 7th Avenue and 16th Avenue. The blocks between 12th and 16th Avenues appear to be the busiest in the area. Overall, the Main Street commercial corridor is a popular shopping destination for local and regional residents and appears to be undergoing a steady revitalization.

4.1.2 Commercial Drive Neighbourhood

The Commercial Drive neighbourhood is located in the northeast quadrant of Vancouver and is comprised of an estimated 27,563 persons within a geographic area bounded by Clark Drive, Nanaimo Street, Powell Street and Broadway. The commercial focus of the neighbourhood is Commercial Drive with the Commercial Drive Business Improvement Area (BIA) comprising a 21-block area from Adanac to 13th Ave, extending generally to the lane east and west of the Drive in either direction.

Readily accessible both locally and regionally, Commercial Drive is a major north-south road (connecting with Victoria Drive) extending the entire length of Vancouver. Other major roads providing local and regional access to the Commercial Drive business area include Broadway, Grandview Highway, 1st Avenue, Hastings Street, and Venables Street.

COMMERCIAL DRIVE AREA	
DAILY TRAFFIC VOLUMES (2006)	
Location	Vehicles Per Day
1100 Commercial Drive @ Napier	14, 514
1800 Commercial Drive @ E. 2nd	17,295
1500 Venables @ Cotton	18,488
1500 E. 1st @ Cotton	39,125

This is a moderate density area comprised of a mixture of older low rise apartments and single family homes. Single purpose and mixed use buildings of 1-3 storeys front Commercial Drive. The neighbourhood population appears to be highly mixed in terms of age, ethnic origin, and income levels. In recent years, the area has attracted a younger population base within the neighbourhood resulting in an increasing number of businesses targeting this group.

Commercial Drive, between Venables Street and 1st Avenue, is a well-established and vibrant commercial area. It has long had a “European” character due to the significant population of Italian origin that have historically lived and operated businesses in the area. The retail precinct is well-anchored with stores including a supermarket, drugstore, government liquor store, and hardware store. There are a wide range of businesses with all major categories well represented. Local neighbourhood residents are well-served by a variety of grocers/markets, retail food vendors (delis, bakeries), and personal and professional services. The large number of full service restaurants, fast food restaurants, and many cafes serve as a strong draw for both neighbourhood residents as well as the wider Vancouver region. There are a large number of specialty retail and clothing stores that also help to broaden the customer draw from outside the local neighbourhood.

The overall quality of businesses is good and there are very few vacancies. The overall quality and moderate price of merchandise is reflective of the moderate income levels typical for the area. The

character is vibrant with strong pedestrian activity and high traffic volumes, particularly on weekends. The vibrancy of Commercial Drive appears to increase as one travels from the south from Venables Street toward East 1st Avenue. There are some social issues in the area (particularly in the vicinity of Grandview Park) but it is generally considered to be a safe and fun area in which to shop.

4.1.3 Gastown Neighbourhood

Gastown is a well-known historic area of Vancouver located in the downtown. Gastown is in close proximity to Vancouver’s office core as well as major hotels, convention facilities, and cruise ship terminals. Due to its historic character and proximity to hotel and tourist facilities, Gastown has long had a reputation as one of Vancouver’s primary tourist destinations. Therefore, many of the businesses cater primarily to the tourist and nearby office populations. However, new businesses and restaurants in the area continue to broaden the appeal of Gastown to the wider regional population. New developments, such as the former Woodward’s site, will increase the residential population as well as attract a younger, well-educated population to the new Simon Fraser University campus

Although local accessibility to Gastown is generally good with Water Street, Cordova Street, Powell, Alexander being the primary east-west roads, Gastown is not as centrally located in relation to many of Vancouver’s residential neighbourhoods as are the Main Street and Commercial Drive areas. Water Street and Cordova Street are one-way streets in Gastown which limits convenient local access by vehicle to some degree. Gastown has strong regional transit access due to its close proximity to Waterfont Station which provides connections to the SeaBus, SkyTrain, Canada Line, and the Westcoast Express. There are a number of parkades in the area (in addition to some street parking) serving the needs of regional traffic destined to the Gastown area.

GASTOWN AREA DAILY TRAFFIC VOLUMES (2006)	
Location	Vehicles Per Day
200 Water Street @ Cambie/Abbott	12,276
300 W. Cordova Street @ Cambie	11,160

There is access to a large residential population in this high density, urban area. Approximately 99% of the housing units are apartments with 69% being rented. While the character of Gastown continues to improve, the social issues associated with the nearby area may serve as a deterrent to some local and other Vancouver residents coming to this area of the downtown, particularly in the evening and night time.

Despite the social problems near Gastown, a significant younger, well-educated, and more affluent population has moved into the neighbourhood in recent years. The development of loft apartments

and condominiums is contributing to Gastown's transformation as a safer and more economically diverse neighbourhood.

Gastown has a unique mixture of business types due to its identity as a major tourist destination, proximity to downtown offices and hotels, and growing popularity as a location for unique retailers and offices. With its strong tourist draw, there are many specialty retail businesses that focus on serving visitors to Vancouver. Due to the higher than average incomes of many downtown tourists and office professionals, Gastown tends to have a larger number of "higher end" (i.e., higher priced) specialty stores than found in a more typical neighbourhood commercial area. Gastown has also become a popular location for unique, high quality retailers and businesses that desire a downtown area location with the unique historic character that Gastown offers. There are also a large number of quality restaurants, pubs, and clubs that draw patrons from downtown and the Vancouver region. Many of the unique businesses in Gastown (talent agencies, schools, computer software, design, movie/media production services) also help to generate pedestrian activity.

With a primary focus on the downtown tourist and office populations, Gastown's current business mix offers only a very limited range of essential goods and services oriented towards the local neighbourhood population. There are a variety of essential goods and services in the nearby downtown region but not within the Gastown commercial area.

Overall, Gastown is a high density urban neighbourhood that continues to evolve with the attraction of a young and well educated population as well as high quality businesses. Currently, the business mix primarily serves the downtown tourist and office populations. While there is a growing population that is young and relatively affluent, the business mix offers a very limited range of essential goods and services to serve the Gastown population.

4.2 COMPARATIVE NEIGHBOURHOOD CHARACTERISTICS

Some of the key comparative demographic characteristics for the three Summer Spaces commercial neighbourhoods are highlighted below and are also compared to the Vancouver benchmark. The demographic data was obtained from both BizMap Neighbourhood Profile data and Communitywebpages profiles, both based on 2006 Canada Census data. A comparison of the key locational and demographic characteristics for each community shows that:

- The Gastown/Downtown area has the highest proportion of young adults aged 20-44 years (56.7%) compared to Mount Pleasant (54.7%), and the Commercial Drive area (47.8%). The proportion of young adults in all three commercial areas is above Vancouver (43.2%).

- In terms of young families, only 9.6% of the Gastown population is aged 0-19 compared to 13.7% in Mount Pleasant, 16.1% in the Commercial Drive area and 19% in Vancouver.
- Education levels are high in both Gastown and Main Street with 46% of residents having at least some university education.
- Commercial Drive area has the highest proportion of residents aged 45+ (36.2%) compared to Mount Pleasant (31.6%) and Gastown (33.7%), and slightly less than Vancouver overall (38.9%).
- Gastown/Downtown has the smallest average household size with 1.7 persons per household compared to Commercial Drive (1.9), Mount Pleasant (1.8), and Vancouver (2.2).
- Compared to Vancouver's average household income (2005), the Commercial Drive neighbourhood was 35.6% less than the Vancouver average, Mount Pleasant was 31.4% less than the Vancouver average, and Gastown was 3.9% less than Vancouver.
- English is the primary mother tongue spoken in all three neighbourhood areas, well above the proportion for Vancouver overall. The proportion of residents having Chinese as their mother tongue is significantly lower in all three neighbourhood areas compared to Vancouver overall.
- 69% of homes in Gastown are rented compared to 67% in Mount Pleasant, 64% in the Commercial Drive area and 52% in Vancouver.

DEMOGRAPHIC PROFILE COMPARISON				
	COMMERCIAL DRIVE (Grandview-Woodlands)	MAIN STREET (Mount Pleasant)	GASTOWN (Downtown)	VANCOUVER
Population	28,205	23,615	43,315	578,040
Population Density	65/ha	65/ha	115/ha	50/ha
Age Profile				
0-9	8.2%	7.8%	5.6%	8.4%
10-19	7.9%	5.9%	4.0%	9.5%
20-34	28.2%	33.3%	36.6%	25.7%
35-44	19.6%	21.4%	20.1%	17.5%
45-54	16.0%	14.7%	14.6%	15.1%
55-64	9.7%	8.7%	10.5%	10.6%
65+	10.5%	8.2%	8.6%	13.2%
Avg. Household Size	1.9	1.8	1.7	2.2
Avg. Household Income (2005)	\$43,943	\$46,860	\$65,580	\$68,271
Education				
University	30%	46%	46%	32%
College & Other	16%	22%	18%	21%
Employment Rate	66.3%	71.4%	64.9%	62.4%
Mother Tongue				
English	63.0%	63.6%	57.1%	49.1%
European	10.3%	7.6%	10.9%	8.7%
Chinese	14.7%	10.4%	14.7%	25.6%
Home Ownership				
Rent	64%	67%	69%	52%
Own	36%	33%	31%	48%
House Structure				
Apartment	70%	83%	99%	59%
Single Detached	10%	4%	0%	20%
Semi-detached	20%	13%	1%	21%

4.3 BUSINESS MIX COMPARISON

The mix of businesses and overall character of a commercial area may also have some influence on business impacts during Summer Spaces days. A review and understanding of the unique business mix and character of each area in relation to Summer Spaces will help in identifying possible improvements to this initiative in the future, and in determining choice of location, timing and other considerations.

Hume Consulting conducted an on-site inventory of businesses in each of the three Summer Spaces commercial areas. The various types of businesses inventoried were categorized into 15 distinct groups for comparative purposes. The general business character of each commercial area was also noted

BUSINESS TYPE CATEGORY GUIDELINES				
CATEGORY CODE	CATEGORY TYPE	COMMERCIAL DRIVE	MAIN STREET	GASTOWN
1	Anchor Stores (specify)	4	3	1
2	Specialty Retail	30	28	30
3	Furniture/Home Furnishing/Décor	6	9	6
4	Clothing & Accessories	21	15	15
5	Fast Food (primarily buy at the counter/takeout)	16	8	5
6	Restaurants (sit down table service)	27	37	20
7	Cafes (primary identity/business is coffee)	10	11	2
8	Retail Food	26	20	2
9	Personal Services	28	30	13
10	Financial Services	4	3	5
11	Professional Services	14	22	11
12	Automotive Services/Parts	0	1	0
13	Recreation & Entertainment	2	7	3
14	Vacancy	4	20	1
15	Other (management, architects, etc.)	7	9	55
	TOTAL	213	245	180

including traffic levels (pedestrian and vehicular), vibrancy/atmosphere, quality of businesses, vacancies, and feelings of personal safety. The three commercial areas were then compared in terms of their business mix and general business character.

It should be noted that these inventories only include those portions of Main Street, Commercial Drive, and Gastown in close proximity to the Summer Spaces street closure area.

- Commercial Drive has the highest number of large, neighbourhood-serving “anchor” stores including a supermarket, hardware store, BC liquor store, and drugstore. This helps to strengthen the draw of local customers on a regular basis.

- In contrast, Gastown has the fewest number of large anchor stores resulting in fewer reasons for local residents to shop locally on a regular basis.
- All three commercial areas offer a comparable number and variety of specialty retail stores. Gastown’s specialty stores tend to be somewhat higher priced compared to Main Street and Commercial Drive, reflective of the higher incomes available from local neighbourhood residents, tourists and downtown professionals.
- Commercial Drive area has the largest number of clothing and accessory stores (21) compared to Main Street (15) and Gastown (15). Both Commercial Drive and Main Street include several consignment and vintage clothing stores reflective of the area’s lower than average income levels.
- All three commercial areas offer a large number of full service and fast food restaurants. The variety of restaurants is a key draw to these areas, for both local and regional residents, adding to their vibrancy and character.
- The inventoried areas of Commercial Drive and Main Street also offer a large number of cafes while the inventoried area of Gastown offers only 2 cafes.
- The Gastown commercial area offers only two retail food stores (a small market/convenience store; a candy/confections store) while the Main Street and Commercial Drive areas offer several produce stores, convenience stores/markets, bakeries, and delis. The local neighbourhood population surrounding Commercial Drive and Main Street are much better served by the selection of essential retail food items and shopping convenience compared to Gastown residents.

- Vacancy rates are very low in both Gastown and Commercial Drive indicating the commercial viability and stability in these areas.
- Main Street has a much higher number of vacancies indicating the variability in traffic and business quality along some portions of the street. Neglected portions of Main Street are in positive transition, with re-investment and redevelopment increasing the commercial vibrancy of those sections.

4.4 SYNOPSIS AND POSSIBLE IMPLICATIONS FOR SUMMER SPACES

There are significant differences in the locational and market characteristics for each of the commercial areas reviewed. It is possible that these differences may have some influence on the relative impact of Summer Spaces. Some of the possible implications of these unique characteristics for Summer Spaces are briefly highlighted for each commercial area:

4.4.1 Gastown

- The high density residential population in the Gastown area provides a significant population base within a relatively convenient (i.e., short) walking distance of the Summer Spaces event.
- Access to Gastown is somewhat more restrictive compared to the Main Street and Commercial Drive areas, which are more centrally located relative to Vancouver's population. While drawing visitors from outside the local area was not a goal of Summer Spaces, this factor may reduce Summer Spaces potential draw from outside the immediate local area, which may limit the potential positive impact for businesses.
- The large percentage of the population base that is young, active, and well-educated is more likely to walk to and be supportive of Summer Spaces and other socially oriented events.
- Gastown's smaller household size translates into lower average household incomes (compared to Vancouver) but not necessarily lower personal incomes. Many young professional singles and couples with higher than average incomes have moved into the new loft/condo developments in recent years. This young affluent age group tends to eat out more and seek out social activities/events which could be supportive of Summer Spaces and businesses within a Summer Spaces area.
- Gastown has the smallest household size indicating fewer couples (more singles) and children. Gastown has a very small proportion of children aged 0-19, significantly smaller than Commercial

Drive and Main Street areas. Therefore, there are fewer local families with children available to participate in Summer Spaces compared to Commercial Drive and Main Street.

- There are a large number of restaurants and pubs in the Gastown area that may benefit from the traffic generated by Summer Spaces and contribute to a vibrant atmosphere.
- Gastown is a very mixed neighbourhood in terms of income levels, education, employment, housing quality, etc. There are a greater number of social issues (homelessness, drugs, violence) apparent in the area compared to Main Street and Commercial Drive which diminishes the appeal of shopping there for some. However, the character/image of this area is improving with new development/redevelopment activity which is attracting young professionals with higher income levels. Summer Spaces ability to attract this younger, active, and more affluent population could benefit local businesses.
- Gastown has had a reputation as a tourist destination because of its historic character and proximity to the downtown hotels, convention centre and cruise ship facilities. Due to its image as a tourist destination, Gastown has a more limited appeal to the broader Vancouver population compared to Commercial Drive and Main Street. This image may limit the potential draw of Summer Spaces from outside the local area that could help support local businesses. Again, the Summer Spaces program was not intended to draw visitors from outside the local neighbourhood.
- Due to its strong emphasis on tourism, Gastown predominantly offers stores and restaurants that serve both tourists and the downtown office workforce. There are a very limited number of businesses that serve the basic day-to-day needs of local population base. As a result, many Gastown area residents are likely accustomed to regularly travelling outside of this neighbourhood to satisfy their essential goods and service needs. The limited number of local-serving businesses and established shopping patterns may diminish/limit the success of Summer Spaces in drawing local area shoppers compared to Main Street and Commercial Drive where local shopping patterns are well established.

4.4.2 Commercial Drive

- Commercial Drive is an established commercial area that is popular with both neighbourhood residents as well as residents of Vancouver and beyond. In addition, Commercial Drive is the location of two “special events” (Car-free Day and Dyke March) each year (involving street closures) that attract local and regional shoppers. The established identity and draw of Commercial Drive

should help to generate traffic to Summer Spaces potentially benefitting the businesses within the Summer Spaces area.

- There is a good selection of local oriented, essential goods and services available along Commercial Drive resulting in strong local shopping patterns within the neighbourhood. These established local shopping patterns should generally help to support businesses during Summer Spaces events. However, Summer Spaces street closures could also reduce the convenience of access to some of these stores (locals frequently drive to their neighbourhood shopping area) resulting in some loss of business.
- The Commercial Drive neighbourhood has a moderate residential density similar to the Main Street area but lower than the Gastown area. The moderate residential density levels in the Commercial Drive area provides a significant local population within a convenient walking distance of Summer Spaces.
- The lower than average household incomes in the Commercial Drive area are not conducive to strong discretionary spending. Lower income levels may limit the amount of additional business sales generated by Summer Spaces, particularly for businesses offering non-essential goods or services.
- There are a greater number of specialty retail stores (fashion, home furnishings, full-service restaurants) in the Commercial Drive area compared to Main Street. Many of these specialty stores rely on a larger trading area compared to local oriented “convenience” goods and services. Therefore, many Commercial Drive businesses are more reliant on weekend customers coming from a greater distance, typically by automobile. As a result, the Summer Spaces street closures would be more likely to negatively impact a greater number of businesses compared to Main Street.

4.4.3 Main Street/Mount Pleasant

- This is a highly accessible commercial area for both local and regional shoppers. Therefore, both local neighbourhood residents and regular shoppers living outside the neighbourhood boundaries should be able to come to the area of Summer Spaces without difficulty.
- The fairly dense population living in close proximity to Main Street should help generate more pedestrian traffic for businesses within Summer Spaces compared to commercial streets within neighbourhoods with lower population density.

- There is a relatively high proportion of young adults living in the area. A young adult population is likely to be active and willing to explore their local neighbourhood as well as patronize local restaurants, cafes, and pubs. This age group is likely to support Summer Spaces, local businesses and other social events/activities.
- The high amount of older, modest, rental housing and lower than average household incomes are not conducive to strong discretionary spending. Lower income areas are more likely to support businesses offering essential goods and services but offer less support for discretionary retail expenditures such as restaurants, clothing, furniture, electronics, etc. These factors may limit the amount of additional sales generated by Summer Spaces pedestrian traffic for some businesses.
- The large (and growing) selection of popular restaurants, pubs, and cafes serve as a good attraction for both local and regional residents. These types of uses help to support Summer Spaces as they help create vibrancy and support social interaction and should benefit from the pedestrian traffic.
- A relatively high proportion of businesses are local oriented goods and services often referred to as “convenience” goods and services. Summer spaces street closures may reduce the convenience of access to some of these stores and therefore encourage locals to shop elsewhere (or not at all)

The potential influence/implications related to the business mix and character of each commercial area on Summer Spaces can be better understood when reviewing the findings of the Business Survey presented in the following section of this report.

5.0 RETAIL-COMMERCIAL IMPACT SURVEY

5.1 SURVEY OBJECTIVES AND DISTRIBUTION

A central component of the Retail-Commercial Impact Study, as set out in the Terms of Reference, was to conduct a detailed survey of businesses most directly impacted by the Summer Spaces. The primary objectives of the survey were to:

- Understand the specific impacts (including business sales impacts) related to Summer Spaces initiative on different types of businesses.
- Receive business evaluation and comments regarding various aspects of the Summer Spaces initiative such as frequency, location, duration, and programming.
- Obtain ideas and recommendations from business owners regarding how Summer Spaces could be improved, if continued in the future.

Hume Consulting, in consultation with City Staff, prepared the survey questionnaire. For survey distribution, arrangements were made with the BIA representative for each commercial area. The BIAs also assisted by announcing to their members that an important survey, to be conducted by Hume Consulting on behalf of the City of Vancouver, would be forthcoming. Based on an inventory of businesses conducted within each commercial area, a total of approximately 650 businesses were identified for the survey. The approximate distribution of surveys to each commercial area was: Commercial Drive 250; Main Street 300; and Gastown 100.

The geographic distribution of the surveys was focussed *within* the area of Summer Spaces related street closures. More specifically:

Commercial Drive: Surveys were distributed to all businesses along Commercial Drive between Adanac Street and East 2nd Avenue inclusive. The distribution also included those businesses located along the cross-streets (between Adanac and E. 2nd) up to one block either side of Commercial Drive.

Main Street: Surveys were distributed to all businesses along Main Street between 7th Avenue Street and 17th Avenue inclusive. The distribution also included those businesses located along the cross-streets (between 7th and 17th) up to one block either side of Main Street.

Gastown: Surveys were distributed to all businesses follows:

- Water Street between Carrall and Cambie
- E. Cordova between Columbia and Abbott

- Alexander Street between Carrall and Abbott
- Powell Street between Carrall and Abbott
- Carrall Street between Water and E. Cordova
- Cambie Street between Water and E. Cordova

Each hard copy of the survey included a reference to an on-line version of the survey that was made available on the Summer Spaces web-site. Respondents were given the option to submit their completed survey with the postage paid envelope provided, or fill out the on-line version of the survey. Due to the potentially sensitive nature of some of the survey information requested, all of the individual written and electronic surveys were reviewed only by Hume Consulting in order to help ensure confidentiality for respondents.

The survey consisted of 24 separate questions. Many of the questions required respondents to make a single selection between listed choices. Several of the questions included room for additional comments or were open-ended questions requiring written comments. A copy of the Retail-Commercial Business Survey is included in **Appendix A** of this report.

Respondents to the questionnaire are self-selecting rather than randomly selected. As a result, the survey responses reflect the thoughts and opinions of those that were most interested and/or motivated to respond. This reduces the statistical randomness of responses but typically generates more detailed responses to questions thereby providing greater insights regarding Summer Spaces impacts.

5.2 SUMMARY OF SURVEY FINDINGS – COMBINED RESULTS

At the time of writing, a total of 87 survey responses were received, including 69 hard-copies and 18 on-line versions. This represents a 13.4% return of surveys distributed. Of the completed surveys received, 46 (53%) were from businesses in the Commercial Drive area, 28 (32%) were from the Main Street area, and 13 (15%) were from the Gastown area. This is a reasonable overall return rate for surveys and provides a sufficient business feedback from each commercial area to help evaluate business impacts during the Summer Spaces initiative.

Survey responses were received in all of the distinct business categories (fourteen business categories were identified) that comprise each commercial area except the 'Financial Services' and 'Automotive Parts & Accessories' categories. Financial institutions are typically closed on Sundays and no Auto Parts & Services businesses were identified in the three Summer Spaces commercial areas. Of the 87 total Survey responses, 65 of the businesses were normally open on Sundays, 18 were from businesses that are normally closed on Sundays, and 4 were from businesses that were open especially for Summer

Spaces. The combined survey response Tables (i.e., combined data for all three commercial areas) for all quantitative questions are presented in **Appendix B** of this report.

While valuable information was gained from the Survey, it should be noted that the Survey results represent the impacts and views of those specific businesses that chose to respond and may not be representative of businesses overall.

Some of the key quantitative and qualitative Survey findings are summarized under several key headings as follows:

Pedestrian Traffic

Q.8 How much pedestrian traffic did you observe in the area of your business (i.e., on the street and on the sidewalks) on Summer Spaces days?			
Response	Frequency	Percent	
Much more	24	30%	
Slightly more	20	25%	
Much less	16	20%	
Slightly Less	6	8%	
About the same	14	18%	
TOTAL	80	100%	

Q.9 How much customer traffic entered your business on Summer Spaces days?			
Response	Frequency	Percent	
Much more	5	6%	
Slightly more	11	14%	
Much less	28	36%	
Slightly Less	7	9%	
About the same	26	34%	
TOTAL	77	100%	

- 55% of respondents indicated that they observed much more or slightly more pedestrian traffic in the area of their business during Summer Spaces.
- 28% of respondents indicated that they observed much less or slightly less pedestrian traffic during Summer Spaces.
- 45% of respondents indicated that much less or slightly less customer traffic entered their business during Summer Spaces compared to 20% indicated having much more or slightly more customer traffic.

Businesses Sales

Q.10 How did the Summer Spaces days (street closures and activities) affect your business sales compared to a normal Sunday's business sales?			
Response	Frequency	Percent	
Increased a little	12	15%	
Increased a lot	5	6%	
Decreased a little	8	10%	
Decreased a lot	26	33%	
No noticeable impact	28	35%	
TOTAL	79	100%	

Q. 11a Percentage (%) Change in sales on the first Summer Spaces day compared to closest non-Summer Spaces Sunday:			
Response	Frequency	Percent	
0-10%	23	35%	
11-20%	3	5%	
21-35%	4	6%	
36-50%	0	0%	
>51%	4	6%	
(0-10%)	7	11%	
(11-20%)	9	14%	
(21-35%)	7	11%	
(36-50%)	6	9%	
(>50%)	2	3%	
TOTAL	65	100%	

- 25.3% of all respondents (22 of 87 respondents) did not report sales or sales measures were not applicable to their business (i.e., church, doctor/dentist, bank).
- It should also be noted that 39.1% of those businesses reporting a sales impact between 0-10% (9 of 23 respondents) actually reported a 0% change in sales.
- 43% of respondents reported that their business sales decreased a lot or a little during Summer Spaces compared to a normal Sunday.
- 21% of respondents reported that their business sales increased a lot or a little during Summer Spaces compared to a normal Sunday.
- 35% of respondents reported no noticeable impact on business sales during Summer Spaces
- Comparing the first day of Summer Spaces to a normal Sunday, 25% of respondents indicated a decrease in sales of between 10% and 35% plus another 12% reporting sales losses of more than 35%.
- 11% of respondents indicated a sales increase of 10% to 35% plus another 6% indicating a sales increase of more than 35%.
- Survey data and comments indicate that reported sales decreases were higher for some businesses on the last day of Summer Spaces compared to the first day.

Customer Impact

Q.14 How do you think that the Summer Spaces program impacted your <u>regular customers'</u> visits to your business?			
Response	Frequency	Percent	
No impact	31	40%	
Encouraged them to shop	9	12%	
Discouraged them from shopping	38	49%	
TOTAL	78	100%	

Q.15 Now that the Summer Spaces program is completed, do you think that the Summer Spaces program helped to attract <u>new</u> regular customers to your business?			
Response	Frequency	Percent	
Yes	18	21%	
No	44	52%	
Not sure	22	26%	
TOTAL	84	100%	

- 49% of respondents indicated that Summer Spaces discouraged regular customers from visiting their business.
- 40% indicated that Summer Spaces had no impact on their regular customers.
- Only 12% of respondents felt that Summer Spaces encouraged their regular customers to shop.
- 21% of respondents felt that Summer Spaces helped attract new customers to their business while 52% indicated that Summer Spaces did not attract new customers.

Question 14 Business Comments (summarized)

- The only foot traffic was walking to catch bus
- People were delayed, traffic disrupted
- Customer count year to date went down 2000 people in July
- Customer complaints about hard to find parking
- Competitive, so many activities around Vancouver on Sundays
- Could not park anywhere; traffic discouraged customers

- People from outside neighbourhood could not access. Customers down 15-30%
- May not have impacted us as a business, those visiting thought it was fun
- Most regular customers come by bike so sales fluctuation not related to Summer Spaces
- No parking was biggest problem. Customers like to park close.
- Many guests complained of increased noise, prefer to be elsewhere during event
- Decrease in patient visits due to "no car" access to parking
- Disruption to public transit dissuaded some people
- Not easy to carry 30 lbs of food on a bike; families with kids in tow can't carry much
- This was a waste of time
- Access for non-locals more difficult; food vendors from other areas should not be allowed
- We have more traffic/busier without Summer Spaces day
- Drive people love any excuse to dress and be on parade! they enjoyed immensely
- The Summer Spaces did get a lot of existing customers into the street
- Would have planned being open if known a couple months in advance
- I came and saw that there was a lot more foot traffic during Farmers' Market.
- We have clients from all over the Lower Mainland - it is hard to get to and there is no parking!
- It is a different draw when there are outside vendors and more special things
- We saw an average of 30% drop in business on each summer spaces day.
- People that usually come from other areas of town avoided the area as there was no parking.
- People outside were looking for events to happen and not really shopping
- Our customers specifically said that they wanted to avoid the events' road closures.
- Our business is very specific and niche oriented. Highly specialized.
- Regular customers found it difficult to park; no buses was another drawback
- Less parking; road closure impeded traffic to store; Traffic/sales down when closure was further up Main
- Customers said they chose to shop south of 1st on Summer Spaces days
- Not sure. Probably no impact
- Customers told us they avoided the area due to traffic and parking congestion
- We set up a booth in front and we still had very low response
- Road closures along bus routes made it difficult for patrons to visit our site.
- No impact on local customers; hard for non-local customers to access and park
- Customers complained and an obvious decrease in sales
- Its viewed as a family event which discourages home renovation business
- Customers couldn't park and pick up coffee
- The program dissuaded customers from entering the business district due to difficulty in traffic.
- Garbage collection pickups were cancelled due to the program.
- Street closure meant no driving or taking bus to come to neighbourhood

Frequency of Summer Spaces

Q.18 In the future, how often would you prefer to see Summer Spaces days occur in your area?			
Response		Frequency	Percent
None at all		23	29%
Once per week		14	18%
Once per month		32	41%
Other		10	13%
TOTAL		79	100%

- A total of 69% of respondents indicated that frequency of Summer Spaces should be once per month or none at all.
- 19% of respondents supported a frequency of once per week

Timing & Location

Q.19 What do you think is the best day of the week for Summer Spaces?			
Response		Frequency	Percent
Friday (evening)		9	12%
Saturday		10	14%
Sunday		45	62%
Other		9	12%
TOTAL		73	100%

Q.20 What do you think would be the best time of day for Summer Spaces?			
Response		Frequency	Percent
Keep the same		24	39%
Start in afternoon		18	30%
start in morning		6	10%
Start in evening		13	21%
TOTAL		61	100%

- 62% of respondents supported Summer Spaces on Sundays.
- The remaining 38% of respondents were almost equally split among Friday evening, Saturday, or none at all
- 39% of respondents supported the existing time of day for Summer Spaces in their area.
- Among the 39 respondents that specified a time of day, 33% suggested a 12 noon start, 18% suggested a morning start (i.e., between 9 am and 11 am), and 28% suggested a late afternoon or evening start (i.e., between 4pm and 7pm).
- Among the 39 respondents that specified a time of day, 41% specified a finish time of between 6 pm and 8 pm, and 36% suggested a finish time of between 9 pm and 12 midnight.

Programming & Activities

Q.21 Thinking of the activities occurring during Summer Spaces, what do you think about the amount of activities in your area?			
Response		Frequency	Percent
Right amount of activities		22	34%
Not enough activities		42	65%
Too many activities		1	2%
TOTAL		65	100%

- 65% of respondents indicated that there were not enough activities occurring during Summer Spaces
- 34% felt there were enough activities during Summer Spaces

Question 21 Business Comments (summarized)

- Nobody participated in activities
- Prefer to see nothing
- No regular activities to attract people
- More street vendors, more crafts, less political stuff
- Need TV stars, fireworks, casinos
- Need music stage, kids events
- Summer Spaces Ok but could be more varied when compared to Car Show, Jazz Fest.
- People did not seem engaged on last day. Like to sell fewer people selling.
- Not the type of activities people really enjoy
- Organization is key; monthly events with planning such as buskers festival
- Blasting music is not an activity
- Better venues draw foot traffic farther up the Drive
- Not sure what exactly was offered
- More things for kids, more street activity, and the band situation should be looked at as the sound was always fighting each other.
- Would love to see this program succeed
- I couldn't see any activities at all!
- So long as Summer Spaces includes a commercial road closure, transit diversion, and blocked side streets, no single nor multitude of activities of any mix can mitigate the economic implosion.
- We did not participate in Summer Spaces on Main Street. Gastown, however, was a great use of Summer Spaces. It only monopolized one street block (ideal) and had a small variety of vendors.
- Activities did nothing to attract people; should be some family fun
- Need bigger draw, more hype
- Need more local artists to sell their products
- Too much crap
- No vision
- More food stalls to keep people in the area

Suggested Changes to Summer Spaces (Question 24 summarized)

- Stop now. Already enough people spaces
- Discontinue the program
- Create themes for different days
- Cancel it. We can't afford to chase customers away.
- Once per year. People weren't interested after first event.
- Less frequent. Allow more parking; free meters
- More children's programming; more advertising sooner; tables too expensive
- Not interested
- Close when least activities elsewhere; bring people with buses
- Less frequent; more advertising/marketing; more festival activities; better transit plan; need parking available; more time to organize
- More involvement from public/businesses; theme; 2 or 3 days; more publicity; more performances
- Poorly thought out; bad planning; poor communication
- More promotion/advertising
- Blood Alley connection between Carrall and Abbott could be popular
- Don't believe Summer Spaces is a benefit. Car free day is established; any more closures become boring, not well attended
- Keep doing it. If it becomes regular event, more will come out.
- More advertising; better planning; permits too costly; event should be more multi-cultural; business owners must plan best one day event
- I don't think so
- Better planned events; constant dialogue between Car Free and BIA. Need time to organize proper events.
- Cutting frequency adds to novelty.
- Better advertising; more awareness for business owners to take advantage
- How about using our parks for music/craft/dance; Many people have no choice but to drive and no alternative supplied; took buses away
- Very good
- Encourage businesses to be more creative. People love the "outdoor market" atmosphere. Concerts in Grandview Park would be good too.
- Reduce it to only one per year
- Main Street is too busy to block it. Night time like "night market". Does not make any difference for shop in Centre Point Mall.
- Extend to Grandview Hwy
- We enjoy Car free day. I think the only changes would be to go till 6pm, less weekends, and more activity. These events need better advertisement so that we can justify the increase of staff and hopefully increase our Sunday sales
- Change it to Saturday and have it open for the whole afternoon – ie. start late morning and continue all day. It could also include art and crafts.
- Certainly a longer lead time to plan, allowing select outside vendors, offering more music or performance through the city, organizing parking (ie Britannia School lots!!) and really emphasizing and highlighting easy transit routes so people can come and enjoy our street!
- Perhaps there could be an increased promotional budget to drive awareness of this new program in this part of our city

- No street closure, more entertainment for the public, use of our local parks to bring more families to the area
- It will never impact our school as we cater to specific individuals looking to become cooks and bakers.
- Improve with more family fun/entertainment; need better sponsors to improve programming; good first effort
- Event was a failure due to lack of planning/funding; Car Free day is model for success; have one or two properly organized/budgeted events
- Once per month max; start later in day; improve transportation & parking options; more advance notice; more events; listen to business feedback
- Ensure that all table vendors have licenses; vendors should not block storefronts
- Change the perception of people about the "new" Gastown
- Portable public washrooms are needed whether Summer Spaces or not
- Better promotion please
- Don't do it!
- Pick one special Sunday per year. It works great for one day.
- Need more local artists; do not charge artists to set up table or minimal charge
- It would be better if once per month; every week makes it less special
- More advertising; more activities
- Too many events not necessarily good; Car Free was immediately huge success because one-off novelty; focus on one commercial area at a time
- We had no advance warning it was taking place
- Increase parking space for an hour only; some cars park for whole day
- Allow beer gardens or allow restaurants to serve beverages to adults in go-cups

5.3 KEY SURVEY FINDINGS BY COMMERCIAL AREA

A review of the survey data by each individual commercial area reveals some of the similarities and differences in terms of impacts, opinions, and recommendations regarding Summer Spaces. The following tables highlight the survey response to key questions broken out for each commercial area.

Sales Impact by Area

SALES IMPACT BY COMMERCIAL AREA (first day)											
	0-10%	11-20%	21-35%	36-50%	>50%	(1-10%)	(11-20%)	(21-35%)	(36-50%)	(>50%)	Total
Commercial Drive	17.6%	2.9%	8.8%	0.0%	5.9%	14.7%	17.6%	14.7%	11.8%	5.9%	100%
Main Street	40.0%	5.0%	5.0%	0.0%	10.0%	5.0%	15.0%	10.0%	10.0%	0.0%	100%
Gastown	80.0%	10.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	100%
TOTAL	34.4%	4.7%	6.3%	0.0%	6.3%	10.9%	14.1%	10.9%	9.4%	3.1%	100%

SALES IMPACT BY COMMERCIAL AREA (last day)											
	0-10%	11-20%	21-35%	36-50%	>50%	(1-10%)	(11-20%)	(21-35%)	(36-50%)	(>50%)	Total
Commercial Drive	17.6%	0.0%	8.8%	5.9%	0.0%	8.8%	14.7%	20.6%	14.7%	8.8%	100%
Main Street	45.0%	10.0%	0.0%	5.0%	5.0%	5.0%	10.0%	15.0%	0.0%	5.0%	100%
Gastown	77.8%	11.1%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	100%
TOTAL	34.9%	4.8%	4.8%	4.8%	1.6%	7.9%	11.1%	15.9%	7.9%	6.3%	100%

- Overall, 39.1% of those businesses reporting a sales impact between 0-10% (9 of 23 respondents) actually reported a 0% change in sales. 25.3% of respondents (22 of 87) did not report sales or sales measures were not applicable to their business category.
- 64.7% of Commercial Drive businesses reporting first day sales indicated a sales decline compared to 40.0% in the Main Street area and 10% in Gastown.
- Overall, 38.2% of businesses specified a positive impact on sales on the first day of Summer Spaces.
- Comparing the first and last day for Summer Spaces, the percentage amount of sales decreases grew in the Commercial Drive area but remained largely the same in the Main Street and Gastown areas.
- The Gastown area showed the least impact on sales during Summer Spaces days.

Sales Impact by Business Type

SALES IMPACT BY BUSINESS TYPE												
	0-10%	11-20%	21-35%	36-50%	>50%	(1-10%)	(11-20%)	(21-35%)	(36-50%)	(>50%)	Blank	TOTAL
Large Store							1	1				2
Specialty Retail	5	2			2		1	2	2	1	6	21
Furniture/décor	1										1	2
Clothing & Accessories	2		2			2	1	1	2		1	11
Café	2				1			2			1	6
Restaurant-Fast Food	3		1				2				1	7
Restaurant-Full Service	3				1	1	1		1	1	1	9
Retail Food			1			1	2				1	5
Personal Services	4					1		1	1		5	12
Financial Services												
Professional Services	1						1				5	7
Recreation & Entertainment						2						2
Auto Parts & Services												
Other	1	1									1	3
TOTAL	22	3	4	0	4	7	9	7	6	2	23	87
% of Total (excluding blanks)	34.4%	4.7%	6.3%	0.0%	6.3%	10.9%	14.1%	10.9%	9.4%	3.1%		

SALES IMPACT BY BUSINESS CATEGORY											
	0-10%	11-20%	21-35%	36-50%	>50%	(1-10%)	(11-20%)	(21-35%)	(36-50%)	(>50%)	TOTAL
Large Store	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%	0.0%	0.0%	100%
Specialty Store	33.3%	13.3%	0.0%	0.0%	13.3%	0.0%	6.7%	13.3%	13.3%	6.7%	100%
Furniture/décor	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Clothing & Accessories	20.0%	0.0%	20.0%	0.0%	0.0%	20.0%	10.0%	10.0%	20.0%	0.0%	100%
Café	40.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	40.0%	0.0%	0.0%	100%
Restaurant-Fast Food	50.0%	0.0%	16.7%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	100%
Restaurant-Full Service	37.5%	0.0%	0.0%	0.0%	12.5%	12.5%	12.5%	0.0%	12.5%	12.5%	100%
Retail Food	0.0%	0.0%	25.0%	0.0%	0.0%	25.0%	50.0%	0.0%	0.0%	0.0%	100%
Personal Services	57.1%	0.0%	0.0%	0.0%	0.0%	14.3%	0.0%	14.3%	14.3%	0.0%	100%
Financial Services	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Professional Services	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	100%
Recreation & Entertainment	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100%
Auto Parts & Services	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Other	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
TOTAL	34.4%	4.7%	6.3%	0.0%	6.3%	10.9%	14.1%	10.9%	9.4%	3.1%	100%

- Again, it should be noted that 39.1% of those businesses reporting a sales impact between 0-10% (9 of 23 respondents) actually reported a 0% change in sales.

- More businesses in all categories reporting sales indicated a negative sales impact compared to a positive sales impact.
- Some the highest negative sales impacts reported were in the Specialty Retail, Clothing & Accessory, Restaurant-Full Service, and Personal Service categories.
- Some of the highest positive sales impacts reported were in the Specialty Retail, Café, and Restaurant-Full Service categories.

Frequency of Summer Spaces

PREFERRED FREQUENCY OF SUMMER SPACES					
	None At All	Once Per Week	Once Per Month	Other	Total
Commercial Drive	25.0%	22.7%	40.9%	11.4%	100%
Main Street	47.8%	0.0%	39.1%	13.0%	100%
Gastown	0.0%	41.7%	41.7%	16.7%	100%
TOTAL	27.8%	19.0%	40.5%	12.7%	100%

- Overall, 19% of respondents preferred a frequency for Summer Spaces of once per week, as implemented in the summer of 2009.
- 41.7% of Gastown respondents preferred Summer Spaces days once per week while 0% of respondents in the Main Street area supported once per week.
- 47.8% of Main Street and 25.0% of Commercial Drive respondents preferred that there be no Summer Spaces days.
- Approximately 40% of respondents in each area preferred a frequency for Summer Spaces of once per month.

Impact on Regular Customers

IMPACT OF SUMMER SPACES ON REGULAR CUSTOMERS				
	No Impact	Encouraged Them	Discouraged Them	Total
Commercial Drive	39.5%	11.6%	48.8%	100%
Main Street	25.0%	12.5%	62.5%	100%
Gastown	72.7%	9.1%	18.2%	100%
TOTAL	39.7%	11.5%	48.7%	100%

- In the Commercial Drive area, 48.8% of respondents felt that Summer Spaces discouraged their regular customers from shopping and 11.6% felt that it encouraged them to shop.
- 62.5% of Main Street area respondents felt that Summer Spaces discouraged their regular customers from shopping while only 12.5% felt that it encouraged their regular customers to shop.
- 72.7% of Gastown respondents felt that Summer Spaces had no impact on their regular customers.

Further analysis of Retail-Commercial Impact Survey findings, by commercial area and business type, combined with other sources of feedback regarding Summer Spaces, will be presented in the Section 7.0 (Synopsis of Key Findings and Conclusions) of this report.

6.0 FINDINGS FROM OTHER SOURCES

6.1 COMMENTS FROM BIA MEETINGS AND SURVEYS

The Business Improvement Associations (BIAs) for each commercial area provide another important source of information in evaluating the Summer Spaces initiative and its impact on businesses. In addition to being involved to varying degrees with the organization of Summer Spaces in their area, all three BIAs sought feedback regarding Summer Spaces from their members after the program was completed. The Commercial Drive BIA was the only commercial area to conduct its own survey of its members prior to the start of Summer Spaces. The feedback received ranged from open discussions at BIA member meetings and/or responses to surveys conducted by the BIA. Hume Consulting was present at those BIA meetings where Summer Spaces was discussed and has received summaries of survey findings from those BIAs that conducted surveys.

The key comments received from business members through BIA surveys and meetings are summarized for each area.

6.1.1 Commercial Drive

➤ Commercial Drive BIA Pre-Summer Spaces Survey

The Commercial Drive BIA conducted a pre-Summer Spaces survey of its members. Business members were asked a range of questions regarding the proposed location, frequency, and time/duration of Summer Spaces as well as their general comments and concerns.

Most respondents in the “Pre-event Survey” supported the Summer Spaces initiative although most supported fewer Sunday street closures than planned (8 Sundays). An event duration of 6-8 hours was generally well supported with most respondents recommending a start time around 12:00 noon. The preferred location of Summer Spaces varied considerably among respondents with some recommending the entire length of the BIA (Venables to 13th Avenue) the area between Venables and Grandview Highway or Broadway and several indicated use of the area between Venables and 1st Avenue. The majority of respondents recommended various forms of programming with family-oriented entertainment/events being the primary focus. There were a wide range of comments and concerns expressed especially regarding the number of events planned per day; the level of event planning/organization, impacts due to lack of street parking, and potential competition from outside

street vendors. **A more detailed summary of the survey findings and comments received are presented in Appendix C.**

➤ **Commercial Drive BIA Post-Event Survey**

Following the first Summer Spaces Sunday, the Commercial Drive BIA provided its members with a “Post-Event Survey” containing 11 open-ended questions seeking comments regarding: sales impact, impact on staffing, event programming, event frequency, event duration, location, possible extension, possible alternate location, and general comments and concerns.

Most respondents supported fewer Summer Spaces days than planned. The majority of respondents also suggested that the level of programming (i.e., events, activities, planning, and advertising) for the Summer Spaces days needed to be increased and/or improved. The majority of the post-event survey comments were critical of or suggested changes to some aspects of Summer Spaces. Complaints regarding a negative impact on business sales increased significantly from the first post-event survey to the second post event survey. In the second post-event survey, specifically regarding sales impacts, 33 of 34 respondents indicated a loss of business sales ranging from 10% to 90%. **A more detailed summary of the survey findings and comments received are presented in Appendix C.**

➤ **Commercial Drive BIA Meeting (post-Summer Spaces)**

Approximately 20 business owners and representatives attended a Breakfast Meeting called by the Commercial Drive BIA and the City of Vancouver to discuss the evaluation of Summer Spaces. The meeting held on September 10, 2009, was called and attended by the Executive Director of the Commercial Drive Business Society and also included City of Vancouver staff and Hume Consulting. Those business owners in attendance felt strongly about the impacts of Summer Spaces on business sales and pedestrian volumes during the series of Sunday road closures.

In short, the Commercial Drive Breakfast Meeting discussion among business owners recommended that four components require an in-depth review before proceeding with any future Summer Spaces in the area: location; frequency; programming; and sales impact. **A more detailed summary of the survey findings and comments received are presented in Appendix C.**

6.1.2 Gastown

➤ BIA Meeting Comments

Hume Consulting and the Coordinator of Summer Spaces met with the Executive Director of the Gastown Business Improvement Society in early September to discuss the forthcoming Retail-Commercial Impact Survey including the geographical survey area, the potential survey responses, and the overall impact of the Summer Spaces program. Some of the key observations and points of discussion were:

- Gastown's Summer Spaces started later and ended later (August through September) than the other two neighbourhood areas. The Summer Spaces program encompassed a small area in Gastown - one block of Carrall Street. It featured a Farmers Market produced by Vancouver Farmers Markets as the main draw as it was this organization that approached the Gastown BIA to participate in Summer Spaces 2009.
- Gastown has hosted several annual well-organized one-day themed events that have successfully built public recognition over the years. These include the Vancouver Int'l Jazz Festival, the Tour de Gastown Bike Race, Concourse d'Elegance vintage car show, and a Motorbike Show & Shine. All these events close Water Street, the main street of Gastown, and are well known around Metro Vancouver and beyond.
- In terms of Summer Spaces, concern was expressed by the BIA regarding the short amount of time available to plan and implement a recurring Sunday street closure which may have impacted the success of the program for local businesses.
- The Farmers Market brought a much needed range of goods to local residents, including fresh produce and baked goods. The availability of these goods created a draw that met a key objective of Summer Spaces - to encourage locals to explore their neighbourhood.
- Hume Consulting, visited a Summer Spaces Sunday in Gastown, and observed that many of the businesses in the one-block Summer Spaces area were closed. Of the businesses that were open, it was not apparent if they were directly participating in the Summer Spaces theme (e.g. outdoor tables/seating) although the Farmer's Market occupied most of the useable area. Acoustic music was provided that contributed to the vibrancy and atmosphere.
- The Gastown BIA agreed to work with the City and Hume Consulting to ensure distribution of the Impact Survey to the appropriate commercial and retail businesses and assist to identify the

appropriate geographical boundaries of potentially impacted businesses. The BIA also sent businesses a follow-up email broadcast to further encourage survey responses beyond the specified deadline.

- **Post-Event Surveys/Meetings:** The Gastown BIA did not conduct its own post-event survey of businesses or conduct post-event meetings with its members regarding Summer Spaces.

6.1.3 Main Street/Mount Pleasant

- **BIA Meeting Comments**

The Mount Pleasant BIA (MPBIA) organized a series of Summer Spaces days that rotated to selected sections of Main Street over six Sundays, twice for each section, under the overall theme of “Market 1886 Our Past is Our Future”. Each Sunday featured a sub-theme highlighting a neighbourhood characteristic such as history, youth, food and safety.

Hume Consulting visited Summer Spaces in late August. Subsequently, after the completion of all Summer Spaces programming, Hume Consulting met with the MPBIA Executive Director to discuss the commercial impact survey and initial feedback from the community’s businesses. Some of the key observations and points of discussion were:

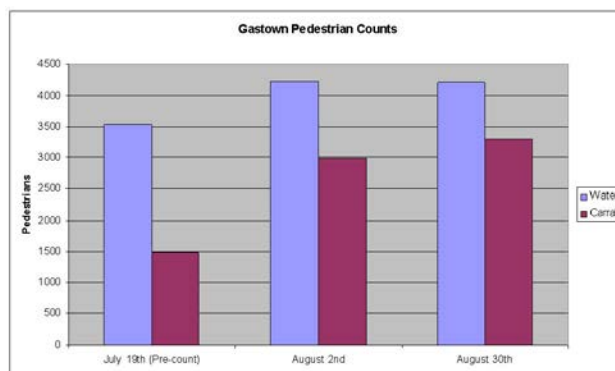
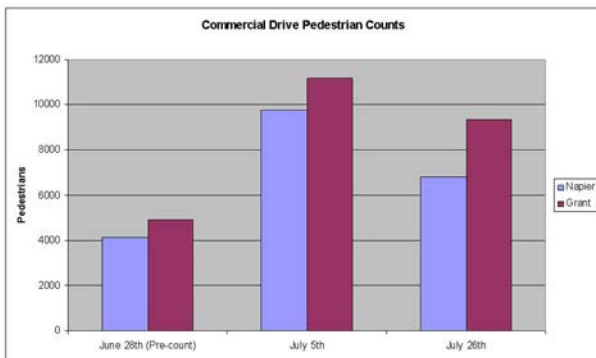
- Unlike the Commercial Drive and Gastown BIAs, the MPBIA does not have an ‘ambassador’ or security team working the area and relies on volunteers to conduct communications initiatives for the BIA. It was reported that there was some misunderstanding regarding the objectives and subsequent organization of the Summer Spaces as it was confused to some degree with the Car Free Day on June 14.
- The MPBIA was successful in communicating the purpose of Summer Spaces in advance to local area businesses. According to the BIA executive, commercial impact was deemed to be positive based on business feedback that they received both during and after Summer Spaces.
- The MPBIA also did their own Intercept Surveys during Summer Spaces, with participants expressing an overall positive feeling toward the program, particularly around the increased opportunities for the community to get together and interact on the street.
- In preparation to distribute the Retail-Commercial Impact Survey, the MPBIA and Hume Consulting discussed the best alternatives to maximize survey responses including explanatory documentation

to accompany the survey, motivation enhancements, addressing the ethnic diversity of business ownership, and consideration of topics to highlight regarding impacts on sales and levels of pedestrian traffic.

- Hume Consulting also attended the MPBIA Annual General Meeting held on Monday, September 14 and addressed those present to further explain the importance survey responses from local business owners once it was distributed to BIA members. There was no general discussion regarding Summer Spaces impacts.
- **BIA Surveys** – a post-Summer Spaces survey (prepared by the BIA Executive) was distributed to BIA members attending the Annual General Meeting but no survey responses were returned.

6.2 PEDESTRIAN COUNTS

City staff conducted a series of pedestrian counts within each of the commercial areas a) just prior to the start of Summer Spaces, and b) on two Summer Spaces days, enabling comparison of the various counts. The pedestrian counts for Commercial Drive, Main Street and Gastown are illustrated in the following charts.



The charts illustrate that pedestrian counts were up dramatically in each commercial area during Summer Spaces days compared to the pre-count levels.

- Pedestrian counts within the Commercial Drive area were up an average of 132% (counts taken north of Grant and south of Napier) on the first day of Summer Spaces compared to the pre-count level (the Sunday before the start of Summer Spaces). A second count taken a couple of weeks later indicates that pedestrian levels remained up significantly by approximately 79% compared to the pre-count level but were down approximately 23% compared to the first day of Summer Spaces.
- Summer Spaces were scheduled along three different portions of Main Street. Pedestrian counts within the Main Street commercial area were up an average of approximately 177% on the first day of Summer Spaces in each area compared to the pre-count levels. Pedestrian counts remained up an average of 111% on the following Summer Spaces day for each area compared to the pre-count level. Again, pedestrian counts decreased over time, due in part to a rainy Sunday on August 9.
- In Gastown, pedestrian counts on Carrall Street (the location of the street closure and Farmer's market) were up approximately 100% over pre-count levels on the first day of Summer Spaces and had increased roughly an additional 20% when counts were taken nearly one month later. Pedestrian counts along nearby Water Street were up approximately 21% over pre-count levels on the first day of the Farmer's Market and remained at that level nearly one month later.

The pedestrian counts demonstrate that Summer Spaces increased pedestrian traffic significantly in all three commercial areas, particularly Commercial Drive and Main Street where Summer Spaces street closures were larger compared to Gastown. The greatest increase in pedestrian counts for Commercial Drive and Main Street were on the first Summer Spaces Sunday, with pedestrian counts decreasing in the Commercial Drive and Main Street areas and increasing along Carrall Street when measured on a subsequent Sunday.

It should be noted that it is difficult to fully interpret changes in pedestrian counts due to the limited number of times that counts were taken. Changes in pedestrian traffic counts (both increases and decreases) can be attributed to a wide range of factors associated with Summer Spaces including: event location, weather conditions, varied levels of programming and activity, occurrence of competing events or activities, changes in visitor interest over time, and the level of adaption or frustration related to street closures.

6.3 RESIDENT SURVEY

City staff conducted a survey of local residents in the neighbourhood adjacent to each Summer Spaces area. A total of 1,411 survey responses were received out of the 14,600 households targeted. Residents were asked several questions including ***“Please indicate the level of impact (significant impact, some impact, or no impact) you experienced on the days that Summer Spaces events took place in your neighbourhood”*** with respect to:

- Vehicle traffic on residential streets
- Noise levels resulting from event programming
- Ability to access transit
- Ability to shop in your neighbourhood

Some of the key Resident Survey results regarding Summer Spaces impacts were:

RESIDENT SURVEY - LEVEL OF IMPACTS			
	No Impact	Some Impact	Significant Impact
Vehicle Traffic	48.5%	30.4%	17.7%
Noise Levels	65.0%	19.7%	10.8%
Access to Transit	56.2%	23.0%	15.7%
Ability to Shop	70.3%	14.2%	10.8%

SHOPPING IMPACT COMPARISON			
	No Impact	Some Impact	Significant Impact
Overall	70.3%	14.2%	10.8%
Commercial Drive	60.1%	16.3%	14.3%
Main Street	74.6%	16.3%	9.5%
Gastown	86.4%	1.9%	7.8%

- Increased traffic on residential streets during Summer Spaces was the area of highest impact according to residents with 48.1% of respondents indicating some impact or a significant impact. An almost equal 48.5% indicated no traffic impact. The increased traffic may have impacted the ability of local and non-local vehicles to access local businesses and/or park nearby.
- 86.4% of Gastown area residents indicated Summer Spaces had no impact on their ability to shop in their neighbourhood compared to 60.1% of Commercial Drive residents and 74.6% of Main Street area residents.
- Commercial Drive area residents indicated the highest impact on shopping in their neighbourhood during Summer Spaces with 30.6% indicating some impact or a significant impact compared to 25.8% of Main Street area residents and 9.7% of Gastown area residents.
- Impact on ability to shop in the neighbourhood during Summer Spaces was the component of least impact overall with 70.3% indicating no impact and 25.0% indicating some impact or a significant impact on their ability to shop.
- Although the resident survey results indicate relatively low impact on local residents' ability to shop in Summer Spaces areas, the data does not necessarily reflect the experience of shoppers travelling by car or by transit from other parts of the city, and who may have had greater difficulty accessing businesses in the Summer Spaces areas.

7.0 SYNOPSIS OF KEY FINDINGS AND REPORT CONCLUSIONS

The conclusions and recommendations presented in this report are based upon a review and analysis of information received from several sources including: a review of the neighbourhood and business character of each commercial area; the Retail-Commercial Impact Survey; comments received from BIA representatives and/or BIA member meetings; pedestrian counts; and the Resident Survey.

7.1 NEIGHBOURHOOD AND BUSINESS MIX ASSESSMENT

The review, comparison, and assessment of each commercial area in terms of the neighbourhood and business mix revealed that there are specific demographic and business characteristics that could have implications regarding the success of Summer Spaces and the impact on businesses. However, due to the many variables that shape individual behaviour, travel/shopping patterns, and business success, there are no specific business mix or demographic characteristics alone that guarantee success for Summer Spaces and all businesses.

- Neighbourhoods with a higher proportion of young families with children at home are more likely to attend Summer Spaces as parents are always seeking safe, fun places and events where they can take their children.
- Neighbourhoods with a higher proportion of young adults are more likely to generate traffic for Summer Spaces as young adults tend to be out-going and adventurous and more willing/able to walk to an event in their neighbourhood.
- Higher density neighbourhoods where there is a large population living within a convenient walking distance are more likely to generate strong local pedestrian traffic.
- Those commercial areas with a strong business mix primarily oriented toward serving the local neighbourhood area rather than a regional population base are likely to have fewer negative sales impacts compared to commercial areas that rely more heavily on customers coming (by automobile or transit) from a wider regional area.
- Areas with a business mix containing a large number of unique specialty stores (i.e., gifts, crafts, home décor, health & beauty products, and fashion accessories) are more likely to attract potential shoppers and benefit from increased customer traffic and sales because

they tend to generate shopping interest and exploration as well as attract impulse purchases. However, those specialty stores that rely heavily on shopping visits from outside the local area may be negatively impacted by the street closures and reduced parking.

- Commercial areas with a good selection cafes, restaurants, and specialty/impulse foods (e.g. ice cream/gelato, cookies/muffins, candies/chocolates) help provide an environment where Summer Spaces visitors can eat, rest/relax, socialize, and/or meet a friend. Many of these businesses are well-positioned to benefit from increased sales during Summer Spaces.
- Commercial areas that offer parking alternatives in close proximity to the Summer Spaces area may better accommodate local customers that normally drive to their local commercial area as well as regular/occasional customers arriving by car from outside the local neighbourhood.
- Negative impacts on businesses may be reduced where a street closure is not along a transit line and other modes of access are not affected. For example, the Gastown Summer Spaces occurred on a one-block stretch of Carrall Street with no transit lines.
- The greater the distance of any transit diversion and the fewer convenient alternative transit options, the more that business accessibility is reduced and the greater the potential negative impact on businesses. For example, transit along Commercial Drive was diverted four blocks west to Clark Drive and there are no transit routes crossing the Commercial Drive Summer Spaces area thereby reducing convenient transit accessibility and potential business.

7.2 RETAIL-COMMERCIAL IMPACT SURVEY

The Retail-Commercial Impact Survey provided a number of important insights in terms of business impacts, praise, criticisms, and recommendations regarding Summer Spaces from the perspective of businesses. The survey was designed to ask a series of related questions that would enable businesses to portray a relatively complete picture of the impacts that they experienced and as well provide their comments and recommendations. It should be emphasized that each Summer Spaces series was substantially different in each of the three commercial areas in terms of size, programming, and activities resulting in some variation in experience for participants. While these differences make it difficult to directly compare the impacts in each area, it does help illustrate a range of impacts related to Summer Spaces under a variety of possible approaches.

The Retail-Commercial Impact Survey provides answers to several key questions needed to evaluate the Summer Spaces initiative. Some of the broad questions addressed by the Survey include:

1. Did Summer Spaces generate more pedestrian traffic in the area?
2. How did Summer Spaces impact business sales overall and by area?
3. How did the frequency of Summer Spaces affect regular and new customers?
4. How do businesses feel about Summer Spaces location, time of day, and programming/activities?
5. How could Summer Spaces be improved?

Each of these questions is addressed below:

1. Did Summer Spaces generate more pedestrian traffic in the area?

The Pedestrian Counts provide clear evidence that Summer Spaces did generate significant pedestrian traffic levels within each street closure area that were well above “normal” levels measured the Sunday before the first day. This was confirmed by the majority (55%) of respondents from the Retail-Commercial Impact Survey that reported observing higher than normal pedestrian traffic levels in the vicinity of their business during Summer Spaces. Many Retail-Commercial Impact Survey respondents in the Commercial Drive and Main Street areas indicated that pedestrian traffic appeared to *decrease* on subsequent Summer Spaces days compared to the first day.

The Commercial Drive area experienced the largest numerical increase in pedestrian traffic compared to a typical Sunday, although Main Street had the greatest percentage increase in pedestrian traffic. The significant residential densities near Commercial Drive and Main Street likely contributed to the strong increases in pedestrian traffic. Both of these commercial areas also have a significant and growing population of young adults that are active in the area plus a significant number of popular restaurants and cafes that likely contributed to the draw and enjoyment of Summer Spaces by visitors. Main Street appears to have offered a higher level of programming and activities to attract and engage visitors. The Main Street BIA reported that its Intercept Surveys indicated that participants were generally pleased with the Summer Spaces series.

Pedestrian counts in the vicinity of the Farmers Market in Gastown area were up significantly in percentage terms on the first day although the actual traffic counts were quite low compared

to Main Street and Commercial Drive. A few weeks after the first day of the Farmer's Market pedestrian traffic counts on Carrall Street had increased slightly and Water Street traffic remained approximately the same compared to the first day. Most businesses reported little or no increase in traffic or customer business. The smaller impact in Gastown is at least partially a result of the smaller scale of the Summer Spaces event compared to Commercial Drive and Main Street. Also, many of the businesses in Gastown reported that their store targets out-of-town visitors and would not benefit from increased local traffic.

Main Street provided a unique situation with its staggered locations resulting in large fluctuations in traffic over the three separate sections of Main Street used for Summer Spaces. The Pedestrian Count illustrated that there was some "spill-over effect" with increased pedestrian traffic on those adjacent blocks that were not part of the street closure.

While Summer Spaces did generate public interest and pedestrian activity, many of the Business Impact Survey respondents commented that public interest appeared to wane over subsequent Summer Spaces weekends due to a variety of reasons including: not enough programming and activities; the lack of a strong theme; too many competing festivals/events in Vancouver; a lack promotion/advertising; and too many events diluted interest.

As stated previously, it is difficult to fully interpret changes in pedestrian counts due to the limited number of times that counts were taken. Changes in pedestrian traffic counts (both increases and decreases) can be attributed to a wide range of factors associated with Summer Spaces including: event location, weather conditions, varied levels of programming and activity, occurrence of competing events or activities, changes in visitor interest over time, and/or the level of adaption or frustration related to street closures.

2. How did Summer Spaces impact business sales?

The success and even the survival of retail and commercial businesses is highly challenging. Due to the many challenges that businesses face, the Impact Survey respondents were often very passionate in both their praise and criticism of Summer Spaces, stating it is their livelihood and sometimes their business survival that is at stake. While businesses are very reluctant to report sales, 75% of survey respondents did provide an estimate of sales impact. While the response rate is insufficient for a quantitative analysis, this information does provide a basic picture of how business sales were impacted within various business categories.

The reported business sales impacts related to Summer Spaces were highly variable. The increased pedestrian traffic did not translate into increased customer traffic for the majority of businesses responding to the survey. When asked if the customer traffic entering their business increased, 45% said customer traffic was much less or slightly less into their business, 34% said customer traffic stayed about the same, and 20% indicated much more or slightly more customer traffic.

Overall, more businesses reported that their sales decreased (43%) than a sales increase (21%). Just over 33% of respondents reported no noticeable impact on sales. More businesses reported a decrease in sales as the Summer Spaces days progressed.

Nearly two-thirds of survey respondents from the Commercial Drive area reported a decrease in sales on the first day of Summer Spaces compared to 40% of respondents in the Main Street area. The higher negative impact in the Commercial Drive area appears to be, at least partly, a function of the larger number of businesses that rely on customer traffic originating from outside of the local neighbourhood area. Many businesses at BIA meetings and in the Impact Survey stated that their store (and Commercial Drive in general) derives a high proportion of its volume from customers originating from outside the local area. The weekends are an especially popular time for residents of the Metropolitan Vancouver area to come to the Commercial Drive area to shop. The Summer Spaces street closures discouraged this important source of business from coming to the area due to decreased accessibility, decreased parking, and traffic congestion.

Based on discussions with the BIAs, Main Street appears to have had a more positive overall experience with Summer Spaces compared to Commercial Drive which may be due to the area's higher reliance on local rather than regional shopping traffic as well as its level of programming. However, there are also a significant number of businesses in the Main Street area that rely on shoppers typically arriving by car or transit. Many of these businesses indicated that they experienced customer and sales losses due to the road closures, resulting in many customers not being able to conveniently access their store.

Nearly all of the Gastown area respondents reported no noticeable impact on their customer traffic or sales although some of these businesses do not rely on local customers. However, some respondents thought that the Farmers Market was a good idea and helped to promote the Gastown area.

While there was no clear pattern of sales impact by particular business category, it appears that those businesses that rely more heavily on customer traffic from outside the local

neighbourhood were more likely to realize a loss in sales during Summer Spaces. Customers from outside the area, typically arriving by car, could not readily access these retail destinations due to the road closures. Also, those businesses that tend to sell larger/heavier items (i.e., grocery stores, pet food stores, hardware stores) were more likely to be negatively impacted as their customers tend to arrive by private automobile in order to more easily transport larger/heavier items.

A variety of businesses did experience increased customer traffic and sales due to Summer Spaces and were pleased with the increased pedestrian traffic in the area. Some businesses appear to have benefited from Summer Spaces by setting up special tables/displays, offering special merchandise or pricing, or providing entertainment outside their store.

3. How did the frequency of Summer Spaces affect regular customers and business?

City Council intended that Summer Spaces be conceived as a series of recurring Sunday closures over the course of the summer months, in order to build neighbourhood awareness and support of the program. Summer Spaces certainly achieved higher than normal pedestrian counts during Summer Spaces days. However, the element of recurrence does not appear to have generated a progressive increase in customer visits or business sales week over week.

A number of businesses in the Commercial Drive and Main Street areas commented that they observed a decrease in pedestrian and customer traffic week over week, and some reported that their customers expressed a loss of interest in the “event”. Some of these businesses expressed concern that there was not a strong enough theme or program to generate continued public interest over consecutive weekends.

A number of comments were received from businesses in both the Commercial Drive and Main Street areas indicating that many of their regular customers were frustrated by the traffic congestion and inconvenience created by Summer Spaces and avoided the area as a result. Very few businesses expressed that they generated *new* regular customers as a result of Summer Spaces.

Survey respondents from the Commercial Drive area were the most vocal in expressing concerns regarding the frequency of Summer Spaces and the negative impact on customer traffic and sales they experienced. With many businesses relying on shopping traffic from outside the local area, particularly on weekends, concern was expressed that the significant business losses due to traffic disruptions were compounded by the repeated street closures

over consecutive Sundays. Various businesses felt that they could not sustain these repeated business losses and requested that Summer Spaces initiative be terminated earlier than planned.

On the positive side, there were a number of businesses in both the Commercial Drive and Main Street areas that had a positive sales impact due to Summer Spaces or at least supported the event and received positive feedback from their customers. Some of those supporting Summer Spaces felt that it was a good first attempt and that with various changes and improvements, Summer Spaces could be a more successful pedestrian-oriented program.

Overall, the majority of Commercial Drive and Main Street Retail-Commercial Impact Survey respondents expressed that the frequency of Summer Spaces (once per week) was too high and recommended fewer Summer Spaces days or none at all.

The weekly occurrence of Summer Spaces in 2009 did generate awareness of this program among local residents and businesses thereby providing a variety of lessons/ideas going forward. For example, the City will be able to make adjustments to Summer Spaces and provide better direction to local BIAs; the BIAs will better understand how to organize a Summer Spaces neighbourhood series and enrol businesses to participate; and businesses will better understand how they might participate to take advantage of increased pedestrian traffic.

4. How do businesses feel about Summer Spaces location, time of day, and programming/activities

Comments received from the Impact Survey and BIA meetings indicate that there was some confusion or misunderstanding among businesses regarding the goals and objectives of Summer Spaces days. While the creation of another “festival” event was not a goal of Summer Spaces, there was an expectation by many businesses that Summer Spaces would be another highly programmed event or festival. Businesses are already highly familiar with such well-established events such as Car Free Vancouver Day along Commercial Drive and Main Street, Gastown’s Motorcycle Show & Shine, International Jazz Festival, and Classic Car Show etc. These events tend to be themed, highly organized, well-advertised and highly programmed to offer a number of activities to engage the public. Viewed in the context of the many well-established festivals and events that already take place in their commercial areas and around Vancouver, many businesses expressed frustration/disappointment with Summer Spaces in terms of the level of planning, programming, advertising, etc. It seems to have fallen short of their expectations as another major programmed event or festival.

Businesses clearly prefer that events staged in their area are highly planned and organized to support business. It is also clear that businesses prefer events that are clearly themed and/or involve a high level of family-oriented events and activities.

5. How could Summer Spaces be improved?

Comments received from businesses through the Impact Survey and at BIA meetings provided a full spectrum of concerns and recommendations regarding Summer Spaces. While the responses varied to some extent among each commercial area, there were several common concerns and recommendations provided.

The **concerns** most commonly expressed regarding Summer Spaces were:

- The frequency of Summer Spaces days was too high
- The street closures resulted in lost customer traffic and sales
- There was insufficient notification time needed to prepare for the event
- There was inadequate time for planning and organization
- There was insufficient programming, advertising, and activities to attract/engage the public
- The lack of parking and restricted access was frustrating/inconvenient for both customers and staff
- Disruptions to transit access discouraged some regular customers
- There are already too many competing “events” around Vancouver

The **recommendations** most commonly expressed by businesses were:

- Reduce the frequency of Summer Spaces to once per month or one event per year or stop the program entirely
- Make some provision for temporary vehicular parking and access to attract/satisfy customers
- Improve the planning and organization of Summer Spaces
- Increase the amount of programming and street activities to better engage the public
- Provide an emphasis on family-oriented activities and entertainment
- Summer Spaces should have a clear theme and become more of a festival event like other successful events held in Vancouver during the year

7.3 CONCLUSIONS

Summer Spaces was a success in terms of generating pedestrian traffic in each of the three commercial areas reviewed. The responses to the Impact Survey indicate that the Summer Spaces initiative was highly mixed in terms of its success and impacts on businesses. Some of the key conclusions that can be drawn from the various sources of feedback regarding Summer Spaces are:

- The increased pedestrian traffic in each area provides a strong indication of public interest in participating in on-street pedestrian experiences and Summer Spaces did generate significant pedestrian activity.
- Increased pedestrian traffic should provide an opportunity for businesses to convert this traffic into customer sales, however increased customer traffic and sales were not realized for many businesses. Therefore, new strategies should be considered by all stakeholders to help ensure that more businesses benefit from Summer Spaces in the future.
- Intercept surveys conducted during Summer Spaces indicate that many of the participants were from the local neighbourhood thereby achieving a Summer Spaces goal of creating a new public open space where neighbours could meet and interact.
- While recurring instances of Summer Spaces may have furthered public awareness and support for Summer Spaces, the element of recurrence did not generate week over week increases in pedestrian counts in the Commercial Drive and Main Street areas. Pedestrian traffic remained well above pre-event levels but did decrease in the Commercial Drive and Main Street areas on subsequent Sundays when counts were taken. Pedestrian traffic levels along Carrall Street in Gastown increased over time compared to the first day of the Farmer's Market.
- Some Retail-Commercial Impact Survey respondents indicated that there was insufficient programming and activities to generate new or recurring visits. Responses also suggest that novelty of Summer Spaces was diluted by having recurring events over several weekends. These comments from businesses are reflective of an expectation that Summer Spaces should be (or become) more of a destination, festival-type event similar to other major events held throughout Vancouver.
- The goal of creating a successful community event/program, with limited resources and programming provided by the City, was at least partially realized. The organization and programming of local activities and events to attract and engage participants was largely left to the local BIA, community groups, and/or local businesses. As a result, the type and level of organization and programming in each area was variable. Many of the business survey respondents expressed that there was not enough local programming to engage participants or encourage return visits.
- The goal of helping to support local businesses by generating increased local traffic and awareness was not met according to the majority of business survey respondents. While

many businesses acknowledged that there was increased pedestrian traffic on Summer Spaces days, there were many businesses indicating that they either lost regular customers and sales or noticed no change due to Summer Spaces.

- From a business perspective, many of the surveys indicate that this additional pedestrian traffic did not translate into new or additional business sales and in many cases businesses suffered significant sales losses or additional costs (i.e., extra staff, promotional costs) that they did not recover.

The relatively short time available to plan and organize the Summer Spaces days reportedly contributed to some of its shortcomings. It is important to recognize that this was the first time that Summer Spaces days was attempted. Like most “first attempts” there were both anticipated and unanticipated successes and shortcomings. Lessons can be learned and improvements can be made.

In a city like Vancouver where there are so many activities and events from which to choose (i.e. many outdoor summer events), it typically takes time for an event to establish itself with the public and local area businesses. Summer Spaces is a unique on-street event and was very successful in achieving its primary goal - it generated significant additional pedestrian/non-automotive traffic in each commercial area where it was located and it created an environment where the community could meet and interact. Building on these positive outcomes, it is reasonable to expect that improvements can be made to Summer Spaces, and efforts made to encourage more active participation/cooperation of businesses to help ensure that they can benefit from possible Summer Spaces days in the future.

8.0 RECOMMENDATIONS

8.1 GENERAL RECOMMENDATIONS

Based on the findings summarized in this report, there a number of broad recommendations intended to help improve possible Summer Spaces days and its impact on businesses for all areas in the future. These recommendations are based primarily on the feedback received from the Commercial-Retail Impact Survey and a presumption that the success of local businesses remains a key goal of Summer Spaces.

Goals and Objectives

With the benefit of feedback received from the various components of the monitoring and evaluation program, there is an opportunity to examine and clarify the purpose and vision of Summer Spaces and then possibly modify its goals and objectives.

- Comments received indicate that the purpose and vision of Summer Spaces need to be reviewed, clarified, and communicated to all community stakeholders.
- A review and assessment of the primary goals and objectives for Summer Spaces is recommended in light of the Impact Survey responses received. The varied impacts related to Summer Spaces illustrate that the combination of goals to create car free commercial streets, temporary public spaces, community/social interaction, recurring public interest, and business success are difficult to achieve simultaneously.
- Once the purpose of Summer Spaces is clarified, detailed consideration should be given to creating appropriate goals and objectives and how they can best be accomplished.
- The setting of goals and objectives for Summer Spaces should carefully consider the needs of, and potential impacts on, all stakeholders. Meetings/discussions should be conducted with representatives from all potentially affected stakeholder groups to ensure that all perspectives are clearly understood.
- Finally, once the goals and objectives are clearly identified, they should be communicated to all potentially affected groups in a timely manner so that they have a better understanding of the program and can plan appropriately.

Planning and Organizational Considerations

The vision of Summer Spaces was to create a new, temporary public space where local residents can meet and interact. The City did not have a detailed Summer Spaces program or take an active role in the planning and programming of Summer Spaces for each commercial area. The intent was to have a more “organic” process where each community would invent its own Summer Spaces program. The City accepted proposals from various community groups from different areas to plan and implement Summer Spaces. As a result, the level of organization, planning, programming and activities was significantly different for each area. This approach has met with mixed results.

- The role of the City in the planning and organization of Summer Spaces should be reviewed. Given the new information generated by the evaluation and monitoring program, the City will now be in the best position to identify how Summer Spaces can be more successful in the future.
- If the Summer Spaces initiative proceeds in the future, it should first be improved based on a thorough review and evaluation of the feedback received from businesses, the BIA’s, residents and attendees.
- Increased lead time is needed for the planning, organization, and promotion of Summer Spaces. Many businesses were unaware or felt they had insufficient notice to prepare for Summer Spaces. Sufficient lead time is needed to enable businesses to deal with staffing, advertising, getting required permits/licenses, planning, and organizing special promotions. An increased lead time will allow for better event planning and coordination between the BIA and local stakeholders.
- The City should take a lead role in developing a strategy for improving communication among all stakeholders regarding the planning and organization of Summer Spaces.
- The City should consider taking a greater role in the planning and organization of Summer Spaces. This may involve:
 - refining the goals and objectives with the cooperation of all stakeholders
 - helping to establish/strengthen the identity, role, and possible theme(s) for Summer Spaces
 - identifying/selecting locations that have the highest potential for success
 - identifying the essential amount and type of programming/activities needed to engage the public

- providing greater direction and support to BIAs and community groups

Locational Considerations

The selection of appropriate locations is a key to the success of Summer Spaces. Based on an assessment of each Summer Spaces commercial area and the results of the Impact Survey, there are a number of locational characteristics that should be considered in selecting future locations for Summer Spaces.

- Summer Spaces days are more likely to be successful if staged within or near commercial precincts that are well-established in the community in terms of role, awareness, and usage.
- When considering or selecting future Summer Spaces locations, give preference to established commercial streets or precincts with a strong mix of neighbourhood-oriented stores and local shopping traffic, as those areas are more likely to experience positive business impacts. Streets that rely on a high proportion of their customer business from outside the local neighbourhood area (i.e., metropolitan and tourist traffic) are more likely to experience negative business impacts if vehicular traffic is restricted.
- A Summer Spaces series is more likely to be successful when located in higher density neighbourhoods where there are larger numbers of residents living nearby that can conveniently walk to one of the street closures.
- The selection of a Summer Spaces series should consider the demographic characteristics of prospective neighbourhoods. Preference should be given to neighbourhoods with one or more of the following characteristics: a higher proportion of families with young children at home; higher than average incomes; a higher proportion of young adults aged 19-44 years.
- If a central goal/objective is to generate more social interaction within the community without the issue of business impacts, consideration should be given to choosing non-commercial streets for Summer Spaces. The use of residential streets located close/connecting to a popular commercial area may reduce negative business impacts associated with street closures while still spinning off increased customer traffic.

Event Frequency

While pedestrian traffic increased significantly in each commercial area during Summer Spaces, it had decreased on a subsequent Sunday in the Commercial Drive and Main Street areas, but

remained well-above the pre-Summer Spaces levels. The element of recurrence did not appear to encourage week over week increases in traffic/turnout on consecutive Sundays according to some survey respondents.

- The responses from the Retail-Commercial Impact Survey provide a strong indication that the frequency of Summer Spaces was too high for many businesses in the Main Street and Commercial Drive areas. Many businesses in these two commercial areas expressed their frustration that insufficient planning and programming combined with the recurring street closures over several weekends compounded the negative impact on their business. Consideration should be given to decreasing the frequency of Summer Spaces days where street closures directly affect a large number of businesses (e.g. Main Street and Commercial Drive), at least in the short term until the issue of negative impacts on businesses can be addressed.
- There was generally favourable support for the frequency of the Farmers Market in Gastown. Its smaller scale and minimal disruption to vehicular traffic appears to have minimized negative impacts to businesses while enhancing pedestrian traffic in the area.
- Once appropriate changes/improvements to Summer Spaces have been made, the program may be implemented on a less frequent basis at least until such time as the event becomes established and successful for the majority of businesses. Increased frequency would be considered if the level of success provides a sufficient level of confidence that additional Summer Spaces days could maintain or increase positive impacts.
- It may be possible to again offer Summer Spaces days on consecutive Sundays if an alternative approach is identified or modifications/improvements are made to increase the positive impacts to businesses (or minimize the negative impacts). Again, all stakeholders would need to be consulted to ensure that there is support for recurring Summer Spaces days. Approaches may include a smaller area of street closures (i.e., Gastown), alternating areas for street closures (i.e., Main Street), and/or the use of residential streets (adjacent to commercial areas).

Programming & Activities

Although the City did not have a major role in the detailed planning and programming of Summer Spaces for each area, many businesses identify it as the City's program. As a result, the City has received many of the complaints/perceived responsibility for any shortcomings or impacts related to Summer Spaces although it did not directly plan the events for each area.

Many of the businesses surveyed expressed disappointment with the level of programming and activities. A desire and expectation for a higher level of programming and activities to create a more festival-like environment for the public was identified.

- Now that the initial “trial run” has been completed, the successes, impacts, and possible improvements are better understood. The City should consider taking a more active role in identifying and supporting the level and type of programming/activities to help ensure the success of Summer Spaces rather than leaving it entirely to each local BIA or community.
- There are already many successful street events around Vancouver that involve a higher degree of programming and activity compared to Summer Spaces. These other events have set a high level of expectations from businesses and the public. If Summer Spaces is to be continued along major commercial streets on a recurring basis, additional planning and initiatives are needed to help increase the level of appropriate programming and activity.
- If a key goal is to generate additional new awareness and customers for local business owners, then a number of changes and improvements should be considered including:
 - Increased advertising and promotion of the event to the public in advance
 - Unless desired by the local BIA/businesses, discourage outside vendors that can take customers/sales away from local businesses
 - Create a map/directory of businesses in the area to help encourage visitors
 - Encourage businesses to participate in this street-oriented event (e.g. by setting up tables and/or displays, offer promotional sales, free samples, etc.)

Access & Parking

- Careful (re)consideration is needed regarding both access and parking. Many businesses expressed that they are dependent on vehicular access from both within and outside the local neighbourhood. Lost customers and business were cited as key impact of the Summer Spaces street closures.
 - If the accommodation of local and non-local shoppers arriving by automobile is deemed to be consistent with the goals of Summer Spaces, temporary, conveniently located parking areas/options should be arranged in each area. This might include the use of school parking lots and/or the temporary lifting of parking restrictions on neighbourhood streets.
 - Access planning should also consider reducing the disruptions to public transit due to bus diversions caused by the street closures. The City needs to work with transit

- agencies to reduce diversions, or find alternative transit or transportation solutions in or to the closure areas.
- Improved notification of temporary street closures is needed as well as improved directional signage for vehicular traffic.
- The possible use of shuttles to move visitors to/from temporary parking areas may be considered

Infrastructure

Comments received from the Impact Survey and BIA meetings indicate that there was inadequate infrastructure for Summer Spaces. Some of the infrastructure needs that should be reviewed and planned for include:

- adequate customer parking areas and possibly shuttles to/from these areas
- more convenient access provision for those using public transit
- adequate promotional and directional signage
- provision of public restrooms
- provisions for garbage disposal, recycling, and pick-up
- public security particularly where alcoholic beverages may be served
- reducing visual impact of engineering street barriers

APPENDIX A

SUMMER SPACES: RETAIL-COMMERCIAL IMPACT SURVEY

SUMMER SPACES: RETAIL-COMMERCIAL IMPACT SURVEY

THANK YOU FOR YOUR PARTICIPATION IN THIS IMPORTANT RETAIL IMPACT SURVEY. THIS IS YOUR BEST OPPORTUNITY TO PROVIDE DIRECT FEEDBACK TO THE CITY OF VANCOUVER REGARDING THE SUMMER SPACES PROGRAM. YOUR RESPONSES ARE CRITICAL TO EVALUATING AND IMPROVING THE SUMMER SPACES PROGRAM IN THE FUTURE.

**PLEASE COMPLETE THIS SURVEY AND RETURN IT IN THE POSTAGE PAID ENVELOPE BY:
OCTOBER 14**

(Your Completed Survey Will Remain Sealed and Forwarded to Hume Consulting)

BE ASSURED THAT YOUR IDENTITY AND RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL - ONLY THE CONSULTANT WILL REVIEW INDIVIDUAL SURVEY RESPONSES. ALL OF THE SURVEY DATA/RESPONSES WILL BE SUMMARIZED IN SUCH A WAY THAT NO INDIVIDUAL BUSINESS RESPONSE CAN BE IDENTIFIED. SUMMARIZED DATA WILL BE USED IN PREPARING A SUMMER SPACES EVALUATION AND IMPACT REPORT FOR THE CITY.

**IF YOU PREFER TO RESPOND USING THE INTERNET, YOU CAN COMPLETE THIS SURVEY ON-LINE AT:
vancouver.ca/summerspaces**

1. In which commercial area is your business located?

- Commercial Drive
- Main Street
- Gastown

2. What is your Business Name? _____

3. What is your Business Address? _____

4. Please identify/describe the primary **type of business** that you operate.

5. Please **check one (v)** of the categories below that best describes the **type of business** that you operate.

- Large Stores** (supermarket, drugstore, hardware, government liquor store)
- Specialty Retail** (cards, crafts, health/beauty products, books, video, gifts, florist, computers/electronics, sporting goods, pet supplies, toys/hobbies, appliances, eyewear, fabrics, art gallery/supplies, office supplies, vitamins/health products, cameras)
- Furniture/home furnishings/decor** (furniture, antiques, decorative items, lighting, garden/patio, bedding/linens, paint & wallpaper)
- Clothing and Accessories** (clothing, shoes, jewelry, bridal, maternity, consignment, rentals)
- Cafes** (primarily serving coffee)
- Restaurants - Fast Food** (limited table service; order at counter, take out)
- Restaurants - Full Service** (primarily provides table service)
- Retail Food** (produce market, grocery store, bakery, deli, butcher, convenience store, candy, ice cream/gelato, cookie, muffins)
- Personal Services** (dry cleaner/laundry, hair salon, nails/aesthetics, video rental, travel, insurance, pet grooming, shoe repair, printing/copying)
- Financial Services** (bank, investment services, money mart)
- Professional Services** (doctor, dentist, lawyer, accountant, veterinarian, physio/massage, real estate, optometrist)
- Recreation & Entertainment** (fitness, yoga, theatre, billiards, bowling, arcade)
- Automotive Services/parts** (auto accessories, auto body, brake/muffler, lube/oil change, glass)

6. Please check (v) those that apply:

- | | |
|--|---|
| <input type="checkbox"/> My business is normally open on Sundays | <input type="checkbox"/> My business was opened especially for the Summer Spaces days |
| <input type="checkbox"/> My business is normally closed on Sundays | <input type="checkbox"/> I closed my business especially for Summer Spaces days |

7. Please estimate what portion/percentage of your **typical Saturday & Sunday** customers come from:

(a) Within your "local neighbourhood" area (i.e., within 4-5 blocks of your business)
_____%

(b) Outside your local neighbourhood area (i.e., more than 5 blocks from your business)
_____%

8. How much pedestrian traffic did you observe in the area of your business (i.e., on the street and on the sidewalks) on Summer Spaces days? (please check one)

Much more than normal Slightly more than normal Much less than normal

Slightly less than normal About the same amount

9. How much customer traffic entered your business on Summer Spaces days? (please check one)

Much more than normal Slightly more than normal Much less than normal

Slightly less than normal About the same amount

10. How did the Summer Spaces days (street closures and activities) affect your business sales compared to a normal Sunday's business sales? (please check one)

Increased sales a little Increased sales a lot Decreased sales a little

Decreased sales a lot Had no noticeable impact on sales

11. Referring to your actual business sales, please calculate the **percentage change** in your business sales on the **first** and **last** day (see chart on next page) of the Summer Spaces street closures on your block compared to TWO non-Summer Spaces Sundays closest to the beginning (before) and end (after) of the program?

(a) Percentage (%) Change in sales on the first Summer Spaces day compared to closest non-Summer Spaces Sunday: _____%

(b) Percentage (%) Change in sales on the last Summer Spaces day compared to closest non-Summer Spaces Sunday: _____%

**SUMMER SPACES
START/FINISH DAYS**

SUMMER SPACES	First Day	Last Day
Commercial Drive	July 5	July 26
Gastown	August 2	September 27
Main Street		
7th Ave. to Braodway	July 5	August 9
Broadway to 12th Ave.	July 12	August 16
12th Ave. to 16th Ave.	July 19	August 23

12. Comparing the first Summer Spaces day to the last Summer Spaces day, how much pedestrian traffic did you see **in the area** of your business? (i.e., on the street and/or sidewalks)

- Customer traffic stayed about the same
- There was more customer traffic on the last Summer Spaces day compared to the first day
- There was less customer traffic on the last Summer Spaces day compared to the first day

13. Comparing the first Summer Spaces day to the last Summer Spaces day, how much customer traffic **did you see IN** your business?

- Customer traffic stayed about the same
- There was more customer traffic on the last day compared to the first day
- There was less customer traffic on the last day compared to the first day

14. How do you think that the Summer Spaces program impacted your **regular customers'** visits to your business?

- It had no impact
- It encouraged them to shop at my business
- It discouraged them from shopping at my business

Comments: _____

15. Now that the Summer Spaces program is completed, do you think that the Summer Spaces program helped to attract **NEW** regular customers to your business?

- Yes No Not sure

Comments: _____

16. Did your business do any of the following to attract customers during Summer Spaces days? (please check one or more)

- No, we operated our business as usual;
 Yes, we offered some special sales pricing;
 Yes, we hired extra staff
 Yes, we set up a day table or display stall in front of our business/on the street;

Other (specify) _____

17. Now that you have experienced Summer Spaces, is there anything that you/your business would do differently to increase the benefit from Summer Spaces in the future? (please specify)

18. In the future, how often would you prefer to see Summer Spaces days occur in your area?

- None at all Once per week Once per month

Other: _____

19. What do you think is the best day of the week for Summer Spaces?

- Friday (evening) Saturday Sunday

Other (specify) _____

20. What do you think would be the best time of day for Summer Spaces? (please check one or indicate specific times)

- | | |
|--|---|
| <input type="checkbox"/> Keep it the same as this summer | <input type="checkbox"/> Start in the Afternoon |
| <input type="checkbox"/> Start in the Morning | <input type="checkbox"/> Start in the Evening |

OR Start time: _____; Finish Time: _____

21. Thinking of the activities occurring during Summer Spaces, what do you think about the amount of activities in your area? (Please check one)

- There were the right amount activities
- There were not enough activities
- There were too many activities

Comments: _____

22. In your opinion, do you think that the number of city blocks of the Summer Spaces street closure area was:

- The right size Too long (i.e., too many blocks) Too short (i.e., not enough blocks)

Comments: _____

23. Where do you think the best location would be for Summer Spaces in your area?

- Keep it where it was this past summer

Other (specify): _____

24. How do you think the Summer Spaces program could be improved/changed to benefit your business or businesses in your area? (please specify)

Comments: _____

APPENDIX B

RETAIL-COMMERCIAL IMPACT SURVEY SUMMARY TABLES

The business survey results are summarized by individual question in the following tables:

Q.1 In which commercial area is your business located?

Response	Frequency	Percent
Commercial	46	53%
Main	28	32%
Gastown	13	15%
TOTAL	87	100%

Q.2 Which of the categories below that best describes the type of business that you operate.

Response	Frequency	Percent
Large Store	2	2%
Specialty Store	21	24%
Furniture/décor	2	2%
Clothing & Accessories	11	13%
Café	6	7%
Restaurant-Fast Food	7	8%
Restaurant-Full Service	9	10%
Retail Food	5	6%
Personal Services	12	14%
Financial Services	0	0%
Professional Services	7	8%
Recreation & Entertainment	2	2%
Auto Parts & Services	0	0%
Other	3	3%
TOTAL	87	100%

Q.6 Please check (✓) those that apply:

Response	Frequency	Percent
Normally open on Sunday	65	75%
Normally closed on Sunday	18	21%
Especially open/Summer Spaces	4	5%
Especially Closed/Summer Spaces	0	0%
TOTAL	87	100%

Q.7a Please estimate what portion/percentage of your typical Saturday & Sunday customers come from: Within your local neighbourhood

Response	Frequency	Percent
0-10%	9	12%
11-20%	9	12%
21-30%	8	11%
31-40%	9	12%
41-50%	16	21%
51-75%	15	20%
>75%	10	13%
TOTAL	76	100%

Q.7b Please estimate what portion/percentage of your typical Saturday & Sunday customers come from: Outside your local neighbourhood

Response	Frequency	Percent
0-10%	5	6%
11-20%	6	8%
21-30%	8	10%
31-40%	8	10%
41-50%	20	26%
51-75%	15	19%
>75%	15	19%
TOTAL	77	100%

Q.8 How much pedestrian traffic did you observe in the area of your business (i.e., on the street and on the sidewalks) on Summer Spaces days?

Response	Frequency	Percent
Much more	24	30%
Slightly more	20	25%
Much less	16	20%
Slightly Less	6	8%
About the same	14	18%
TOTAL	80	100%

Q.9 How much customer traffic entered your business on Summer Spaces days?

Response	Frequency	Percent
Much more	5	6%
Slightly more	11	14%
Much less	28	36%
Slightly Less	7	9%
About the same	26	34%
TOTAL	77	100%

Q.10 How did the Summer Spaces days (street closures and activities) affect your business sales compared to a normal Sunday's business sales?

Response	Frequency	Percent
Increased a little	12	15%
Increased a lot	5	6%
Decreased a little	8	10%
Decreased a lot	26	33%
No noticeable impact	28	35%
TOTAL	79	100%

Q. 11a Percentage (%) Change in sales on the **first Summer Spaces day** compared to closest non-Summer Spaces Sunday:

Response	Frequency	Percent
0-10%	23	35%
11-20%	3	5%
21-35%	4	6%
36-50%	0	0%
>51%	4	6%
(0-10%)	7	11%
(11-20%)	9	14%
(21-35%)	7	11%
(36-50%)	6	9%
(>50%)	2	3%
TOTAL	65	100%

Q. 11b Percentage (%) Change in sales on the **last Summer Spaces day** compared to closest non-Summer Spaces Sunday:

Response	Frequency	Percent
0-10%	23	35%
11-20%	3	5%
21-35%	3	5%
36-50%	3	5%
>51%	1	2%
(0-10%)	5	8%
(11-20%)	7	11%
(21-35%)	10	15%
(36-50%)	5	8%
(>50%)	4	6%
TOTAL	64	100%

Q. 12 Comparing the first Summer Spaces day to the last Summer Spaces day, how much pedestrian traffic did you see **in the area** of your business?

Response	Frequency	Percent
Stayed the same	28	35%
More customer traffic	12	15%
Less customer traffic	40	50%
TOTAL	80	100%

Q. 13 Comparing the first Summer Spaces day to the last Summer Spaces day, how much customer traffic **did you see IN your business?**

Response	Frequency	Percent
Stayed the same	36	49%
More customer traffic	4	5%
Less customer traffic	34	46%
TOTAL	74	100%

Q. 14 How do you think that the Summer Spaces program impacted your **regular customers'** visits to your business?

Response	Frequency	Percent
No impact	31	40%
Encouraged them to shop	9	12%
Discouraged them from shopping	38	49%
TOTAL	78	100%

Q. 15 Now that the Summer Spaces program is completed, do you think that the Summer Spaces program helped to attract **new** regular customers to your business?

Response	Frequency	Percent
Yes	18	21%
No	44	52%
Not sure	22	26%
TOTAL	84	100%

Q. 16 Did your business do any of the following to attract customers during Summer Spaces days?

Response	Frequency	Percent
Business as usual	42	43%
Special sales pricing	20	21%
Hired extra staff	14	14%
Set up day table/display	21	22%
TOTAL	97	100%

Q. 18 In the future, how often would you prefer to see Summer Spaces days occur in your area?

Response	Frequency	Percent
None at all	22	28%
Once per week	15	19%
Once per month	32	41%
Other	10	13%
TOTAL	79	100%

Q. 19 What do you think is the **best day of the week** for Summer Spaces?

Response	Frequency	Percent
Friday (evening)	9	12%
Saturday	10	14%
Sunday	45	62%
Other	9	12%
TOTAL	73	100%

Q. 20 What do you think would be the **best time of day** for Summer Spaces?

Response	Frequency	Percent
Keep the same	24	39%
Start in afternoon	18	30%
start in morning	6	10%
Start in evening	13	21%
TOTAL	61	100%

Q. 21 Thinking of the **activities** occurring during Summer Spaces, what do you think about the amount of activities in your area?

Response	Frequency	Percent
Right amount of activities	22	34%
Not enough activities	42	65%
Too many activities	1	2%
TOTAL	65	100%

Q.22 In your opinion, do you think that the number of city blocks of the Summer Spaces street closure area was:			
Response		Frequency	Percent
Right Size		42	62%
Too Long		19	28%
Too Short		7	10%
TOTAL		68	100%

Q.23 Where do you think the best location would be for Summer Spaces in your area?			
Response		Frequency	Percent
Keep it where it was		42	61%
Other		27	39%
TOTAL		69	100%

APPENDIX C

COMMERCIAL DRIVE PRE AND POST-EVENT SURVEY RESULTS

Commercial Drive BIA Pre-Summer Spaces Survey

A total of 28 responses were received. The key comments received are briefly summarized as follows:

- Summer Spaces Frequency (July and August): 13 of 28 respondents supported a total of 1 or 2 Sunday street closures; 4 of 28 respondents supported 3-4 Sunday closures; 8 of 28 respondents supported 8 Sunday street closures;
- Duration/Time: 22 of 28 respondents indicated a Summer Spaces event duration of 6-8 hours; of the 13 respondents that indicated a specific time, 11 respondents indicated a start time between 11:00 am and 1:00 pm (8 respondents suggesting a 12:00 pm start), 2 indicated a 10:00 am start.
- Location: 7 respondents recommended Venables to Grandview Highway or Broadway; 5 respondents recommended the current location Venables to 1st; 4 respondents recommended the entire BIA area from Venables to 13th Avenue; 2 recommended Venables to Grandview Park; 1 recommended different areas of different days; 1 recommended Venables to 3rd Avenue; 1 recommended 1st Avenue to 6th Avenue.
- Programming: 17 of 28 respondents recommended various forms of programming including: entertainment, festival type events, children's activities, music, performance, kids stuff, games, family fun/family oriented, themed, crafts and farmer's market, art displays, street performers, and street vending by restaurants. 2 respondents did not want loud music and 2 respondents did not want competing vendors on the street.

Comments/Concerns (summarized):

- Eliminate outside vendors
- 8 events far too many
- Nothing political or extreme
- Festivals would be nice
- Programming very important
- Liquor licenses must be enforced
- Additional parking is needed
- There is no specific theme
- Do not support non-programmed events
- Great for business
- Need additional parking
- More recycling bins
- Loss of business
- Lack of organization
- Not including businesses past 1st Ave.
- Concern about parking/discourage customers
- Competing vendors
- Great for community
- More parking for bikes
- Security and policing
- Vehicle access for business owners/residents
- More patio action/beer gardens

Commercial Drive BIA Post-Event Survey

A total of 43 responses to the survey were received. A second survey regarding *sales impacts only* was conducted after the third Summer Spaces Sunday with 34 business responses received.

- Sales Impact: 21 of 43 respondent commented on sales impacts related to Summer Spaces. 15 of the comments indicated reduced customer traffic and/or reduced sales; 4 indicated that sales were generally unchanged; 4 respondents indicated that sales were down approximately 25-30%; 3 indicated sales were down approximately 50%.

In the *second survey regarding sales impacts*, 33 of 34 respondents indicated that their business sales were down. 7 respondents indicated a decrease in sales of 10-20%; 13 respondents indicated a decrease in sales of 21-40%; 6 respondents indicated a decrease in sales of 41-60%; and 3 respondents indicated a decrease in sales of greater than 61%; and 4 respondents provided no specific percentage.

- Staffing: 30 respondents were closed or made no comment; 2 indicated that additional staff was not needed; 3 indicated that additional staff was needed; 8 respondents indicated “too many staff/sent staff home”.
- Programming: 17 respondents suggested additional/better programming (i.e., more entertainment, activities, more vendor/business participation on street) and advertising; 4 respondents thought the programming was good; 4 respondents thought there should be less programming or it had no impact.
- Frequency: 8 respondents indicated that the frequency of Summer Spaces days was good/fine; 18 respondents indicated that the frequency of Summer Spaces days was too frequent or recommended fewer days.
- Duration: 14 respondents indicated that the daily duration of Summer Spaces (i.e., number of hours) was good/fine. 8 indicated that the duration was too long or specified shorter hours; 2 respondents indicated longer hours.

Comments/Concerns (summarized):

- Confusing for public
- Advertise!
- Interferes with regular customers
- Should be themed

- More events needed
- Need advertising
- Deterred from making large purchases (no cars)
- Sales down
- Staff negatively affected
- As community event, I support it
- Frequency should be adjusted
- Worried about over-doing it
- Wonderful opportunity to attract new customers
- Businesses suffered badly
- 1 event in July and 1 in August
- Losing business, not well organized
- Only made extra money on first day
- Lack of parking, programming, and advertising
- Poor music/musicians
- Lack of parking
- Liability rather than showcasing community
- A lot of garbage generated
- How do we get involved?
- Applaud efforts but diluted brand of original car free day
- Inconvenient for staffing
- Not enough notice to prepare
- Store gained exposure
- Customers had positive feedback
- Increase in theft/more staff required

➤ **Commercial Drive BIA Meeting Comments** (post-Summer Spaces)

Some of the key views and comments expressed at the meeting include:

- The frequency of Summer Spaces Sundays was of paramount concern with the feeling that there were too many street closures. The closures directly impacted the shopping habits of regular customers and eventually all customer traffic coming to The Drive.
- In looking forward to 2010, with three major special events already in the planning stages for the summer (World Cup, Italian Day, Olympics, Car Free Day) that will impair vehicular access to businesses, there was strong concern of additional Summer Spaces road closures.
- Comments regarding the future of events on The Drive also centered on the need to provide a proper infrastructure for street closures in terms of signage and parking alternatives, and the need to advertise the event well in advance and provide the public with instructions regarding how to access the event and the businesses.
- One of the reasons identified for the success of "Car Free Day" was that the event had a strong "green" theme that was both well organized and communicated to the public to gain support.

Unlike the single Car Free Day, a recurring program of street closures did not establish a clear theme and created an increasingly difficult environment for businesses to serve their customers.

- There was discussion regarding the existing “Car Free Day” which has already established a profile on The Drive and the purpose of pedestrian only days such as Summer Spaces. Business owners and managers stated that they are a part of the heritage of the Commercial Drive community and their survival and ability to maximize business on the weekends is integral to their survival. Going ‘green’ by becoming regularly pedestrian-only is not easy to introduce to their residential customer base or to those who travel from other areas to shop Commercial Drive on weekends.
- There was a strong sentiment that the one day a week of Summer Spaces really impacted business levels and became increasingly more negative as the Summer Spaces program continued.
- Those in attendance at this Breakfast Meeting wanted an opportunity to provide feedback for future planning by the City. Security and safety during the event is important to ensure shoplifting and petty crime is prevented. Graphically lively signage is necessary to communicate a unique event/program with the immediate elimination of the engineering orange cones and barricades that give a message of ‘street closure’, street work and the need to avoid the area.
- In addition to the frequency, infrastructure, advertising and security of a Summer Spaces program, the timing of the closures for pedestrian traffic was discussed. Among those present, evenings were generally accepted as a possibility as it would benefit the food service businesses and have little impact on general retail businesses that rely on Saturday and Sunday shoppers. An evening “Night Market” was mentioned where retailers could remain open or have kiosks, with vehicular traffic directed to convenient designated parking areas allowing visitors to access the Drive with a short walk. Historically, as with the various Chinese Night Markets, security would need to be a higher priority if a program such as this was introduced to The Drive.