Attachment 3: Survey Results Highlights

Background and Objectives

As part of the Neighbourhood Retail and Services team's investigation of small-scale retail, service, and office uses, the *Independent Small Business and Community Services Survey* was created. The survey recognizes that understanding the needs and perspectives of business owners, and community service providers is vital. Their experiences and insights illustrate how Toronto's Zoning By-laws can support or hinder economic development in *Neighbourhood* designated lands. The survey's goal was to provide policy makers with evidence-based recommendations to update the City's zoning-by-laws and permit small-scale retail, services and office uses in *Neighbourhoods*.

Survey Method

The survey was conducted as a component of the Neighbourhood Retail and Services Phase 2 workplan. The Survey was available and active during August and September 2023 on CheckMarket, an online surveying platform. To maximize participation and reach, the survey deployment strategy included multiple promotions on Twitter (now called X), and distribution among other stakeholder networks. These networks include the Toronto Association of Business Improvement Areas (TaBIA) and the United Way. The survey was structured into three different streams, guiding respondents to the relevant set of questions based on their status as either:

1. Future or prospective business owners/community service providers;
2. Current business owners and community service providers; or
3. Professionals (such as planners and architects) and associations.

The future business owners/community service providers stream had fourteen questions. The current business owners and community service provider steam had twenty-seven questions. The professionals and association stream had seven questions. The survey questions were varied, including multiple-choice where participants could select the best answer(s), open-ended questions for written responses, and Likert scale questions, where respondents would rank how they feel on a particular statement ranging from strongly agree to strongly disagree.

Survey Results

Uses

One category of questions in all three survey streams pertained to uses. In the survey streams targeting both future and current business owners/community service providers participants were prompted to identify the nature of their existing or planned business/service. The data revealed a diverse range of responses from current business owners, whereas future business owners predominantly indicated a preference for dining and/or take-out services (refer to Table Q3/18 for details). Conversely, the survey stream for professionals and associations inquired about the types of business uses they would deem appropriate for Toronto's *Neighborhoods*. Among the options, childcare and retail stores and services emerged as the most favoured choices. Additionally, a significant number of respondents also endorsed artist studios, massage therapy, and personal service shops as appropriate uses. The production studio category received the lowest level of endorsement.

Table Q3/18: Non-Residential Uses

What is the nature (use category) of your prospective or current business/services?		
	Future	**Current**
Community and/or Cultural Spaces	10%	7%
Dining and/or Take-out	40%	27%
Health Services	5%	7%
Production and/or Office Uses	15%	24%
Retail, Personal, and Pet Services	20%	36%
Other	10%	0%

Location

In the current business owners/community services stream, participants specified the type of building in which their businesses were situated. Many current business owner / service provider respondents were located in mixed-use buildings. Very few respondents were located in residential dwellings or ancillary buildings, which is consistent with the historically restrictive nature of Toronto's zoning by-laws. The survey results also illustrate that these businesses are either located in the basement or on the ground floor of in a residential dwelling.

In contrast, when future business owners/community service providers were asked about the ideal building type for their prospective businesses, responses were varied across all building categories. Concerning the preferred building level, survey results clearly indicated a preference among future business/service providers to locate their ventures on the ground floor of buildings or dwellings.

The last questions pertaining to location had respondents evaluate location specific factors, using a five-point scale Likert scale of strongly disagree to strongly agree, that could potentially contribute to the success of their small business. From a list of fifteen factors, respondents found the most important factors to be:

- Access to transit;
- Ease of walking to business;
- Access to cycling infrastructure;

- Having outdoor space on sidewalk or boulevard;
- Access to an outdoor space (such as front patio, rear patio or roof top patio);
- Having many people living nearby;
- Being in close proximity to other businesses; and
- Having a location on a corner site.

The factors that had more neutral responses included:

- Commercial ceiling heights;
- Ease of loading and delivery;
- Access to parking;
- Location on a wider busier street; and
- Location on a narrow, less busy street.

The least important factor was that the area surrounding their prospective or current business/service had few people living nearby.

Size

Respondents were also asked about the size of their current or desired spaces. A substantial 82 percent of future business owner/service provider respondents expressed a preference for interior spaces of 100 m² or less. Comparably, 77 percent of current business owners/community service providers indicated that their existing interior spaces were 200 m² or less. Additionally, respondents of the professionals and association stream were asked about the appropriate maximum interior floor area for small-scale retail, service, and office uses located in Toronto's *Neighbourhoods*. Although the responses ranged from 25 square metres to no maximum, 24 percent and 27 percent of respondents selected the ranges of 71-100 square metres and 101-200 square metres respectively.