



Business Census of the Wellington West BIA

Final Report

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Prepared by Creative Neighbourhoods

Michel Frojmovic, Jamie Carrick, Eamon Kelly

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1. Purpose and intended outcome

The Wellington West Business Improvement Area (WWBIA) conducts an annual census project to update and improve its business directory. The WWBIA covers approximately 2000m east to west from the O-train line to Island Park Drive along Wellington St West, and 900m north to south from Scott St to Byron Ave along Parkdale Ave.

The fifth annual census survey took place from May to July 2018, with follow-up visits and spot checks in August. This involved conducting business visits – going “door to door” and “floor to floor” - to capture all visual signage and business locations. During this period, construction took place at Tunney’s Pasture for the LRT system.

In addition to the regular business census, a voluntary business survey was conducted to collect information local economic activity.

The purpose of the census project is to collect basic data on all street addresses located within the BIA, maintain and establish communication with business owners and managers, and update the inventory of businesses located within the BIA. The information gathered in the multi-purpose database can also be used as an input for:

- Updating the BIA’s online searchable directory
- Measuring level of online and social media presence
- Designing BIA marketing and promotional tools
- Identifying commercial properties not included in the BIA levy
- Categorizing business sectors within the BIA
- Assessing interest in community programs
- Determining the level of economic activity in the BIA

2. Methodology

The first census project in 2014 served as the base for developing the tools and products required for future census surveys. This involved the design and methodology of the census questionnaire and tools (January to May 2014), undertaken by Creative Neighbourhoods. The implementation of the first census survey (May to August 2014) was conducted by a team of two students (Jorge Garza and Maya Amichai) under the supervision of Creative Neighbourhoods.

The census project was repeated in 2015. For 2016, the same methodology was followed with the addition of a business survey consisting of three modules: commercial green bin program, accessibility, and local economic impact. The introduction of survey modules with a target response rate of 50% was an efficient method for collecting information from members on topics of strategic value to the BIA and its membership. This practice was repeated in 2017 and yielded a similar response rate, however only the local economic activity questions were asked.

This year, for the 2018 census project, a business survey was created by Creative Neighbourhoods (Michel Frojmovic and Julie Lam) and approved by the BIA. The census survey followed the same methodology as the previous years and was conducted by two community researchers (Jamie Carrick and Eamon Kelly) during May to July 2018, with follow-up in August.¹ Two new survey modules were introduced, which asked questions about parking and accessibility.

The following list provides a rough guide of the census process:

1. Review the current database
2. Review the survey routes and boundary zones
3. Conduct the visual survey and online survey
4. Conduct the in-person business survey
5. Update the census spreadsheet on an ongoing basis
6. Make follow-up visits
7. Conduct quality control spot-check visits to confirm results
8. Complete the annual census spreadsheet
9. Update the online directory

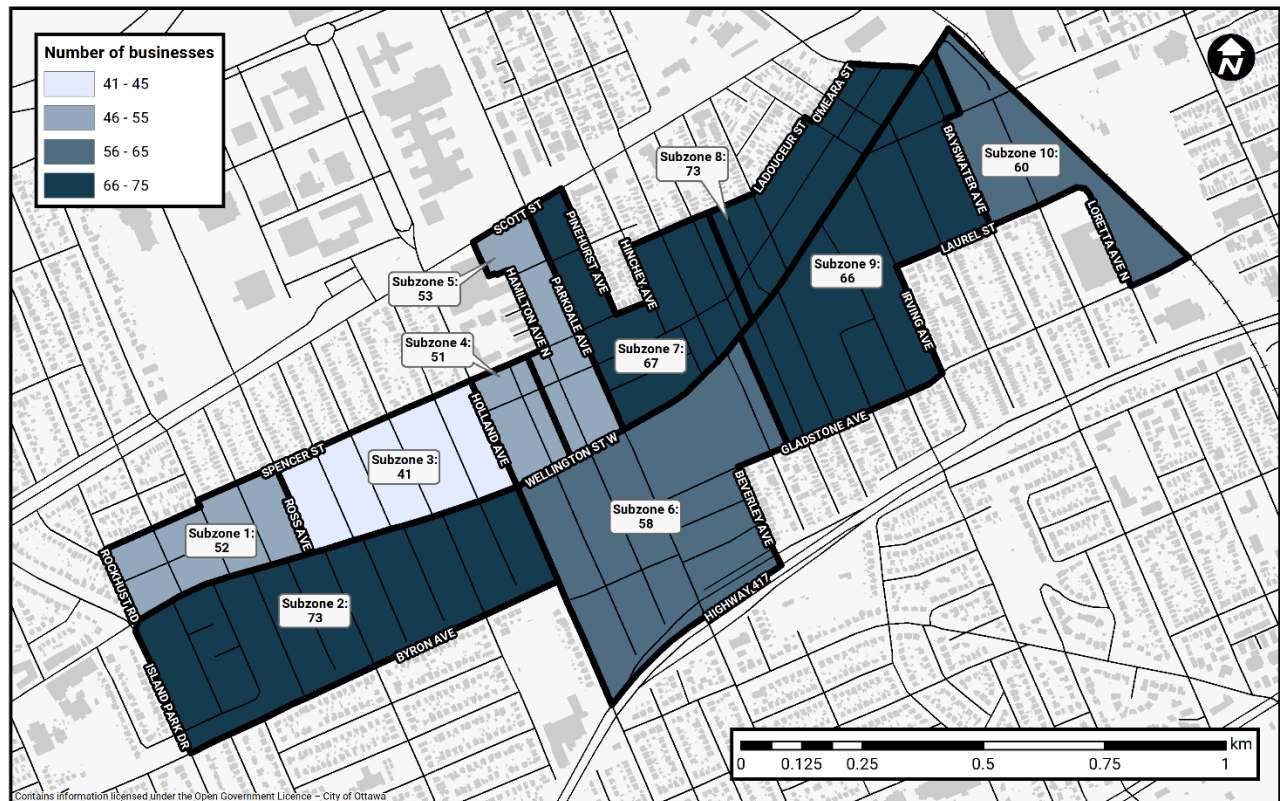
Administration tools used for the census included a digital tablet containing the most up-to-date census spreadsheet and printed business survey questions. Every street address and unit in non-residential properties located within the BIA was visited. By conducting business visits, the surveyor was able to maintain BIA presence and establish face-to-face contact with a business owner, manager, or representative. If no knowledgeable persons were at location, then a follow-up visits, e-mail or phone call was made.

Updates to the census spreadsheet were supplemented by web searches and the properties were cross-referenced using the City of Ottawa's tax rolls. For quality control and validation of results, visual spot checks and re-visits for certain locations were made.

¹ For more information on the methodology, refer to the 2018 Census Guidelines document.

The Wellington West BIA was divided into four zones for ease of tracking and conducting the survey. For analysis, the BIA was divided into ten subzones to provide each subzone with a similar number of business locations in that area.

Figure 1. Number of unique business locations in each of the ten subzones in the BIA



3. Business survey module

The census included a business survey module containing questions of strategic value to the BIA and its membership. The survey target response rate was 50% (267 respondents) on questions included in this module:

Economic Impact Analysis: Purpose was to collect annual information on year-over-year business performance. The 2016 census served as a baseline, with questions made to address year-over-year performance

The business survey questions are listed below:

MODULE 1: MEMBER ENGAGEMENT/INFORMATION

1. Is the business owner the same as the property owner? (Yes/No)
2. Year business established/year location established?

MODULE 2: PARKING

1. On a scale of 1-5, how difficult is it for your customers to find parking? (1=not a problem, 5=a serious problem)
2. On a scale of 1-5, how difficult is it for owners and employees to find parking? (1=not a problem, 5=a serious problem)
3. Is there parking available to employees?
4. How many of your employees (including the owner and manager) do you estimate use on-street parking during business hours?

MODULE 3: ACCESSIBILITY

1. On a scale of 1-5, how familiar are you with Accessibility requirements, including requirements of the Accessibility for Ontarians with Disabilities Act (AODA)? (1=not at all, 5=very familiar)

MODULE 4: LOCAL ECONOMIC IMPACT ANALYSIS

1. Have your sales gone up, down, or the same over the past twelve months?
2. Approximately how many staff including yourself, do you employ on a full time or part-time basis?
 - a. Number of part-time staff?
 - b. Number of full-time staff?
 - c. Number of minimum wage employees?
3. In what year is your current lease up for renewal?
4. For businesses renewing their lease 2018, are you planning to or have you decided to:
 - a. Renew your lease
 - b. Relocate within BIA
 - c. Relocate outside of BIA
 - d. Close your business
 - e. Sell your business
 - f. Other:
5. If you are not renewing your lease, what is the primary reason for your decision?

4. Analysis of the census and business module

The information collected in the survey represent a mix of information intended for public consumption in the form of a business directory, and data restricted for use by BIA staff or board members.

The BIA census serves as an input for various topics relevant to the BIA, but not limited to:

1. Online searchable directory
 - Easy to export database to the online directory

- Directory displays the most up-to-date business profile for the public
2. Communication between BIA and businesses
 - Primary contact information obtained and capable of export into HighRise or similar contact management tools
 - Easier to contact, promote events, and market the business
 3. Marketing and promotion
 - Basic Wellington West BIA profile
 - The scale and scope of businesses in Wellington West
 - Measure level of online presence through social media
 - Check the hours of operation, see how busy the street is
 - Look at the categories of businesses within the BIA, local niches
 4. Understanding the Local economy
 - Evaluate the number of vacancies, how many remain vacant
 - Business turnover, see number of businesses that closed or opened
 - Years of operation in Wellington West
 - Increase in sales and staff
 - Snapshot of leases
 5. Community awareness
 - Enable accessibility and promoting programs such as StopGap
 - BIA initiatives, grants, projects, and beautification
 - Events such as Tastes of Wellington and Hintonburg Happening

5. Observations and discussion

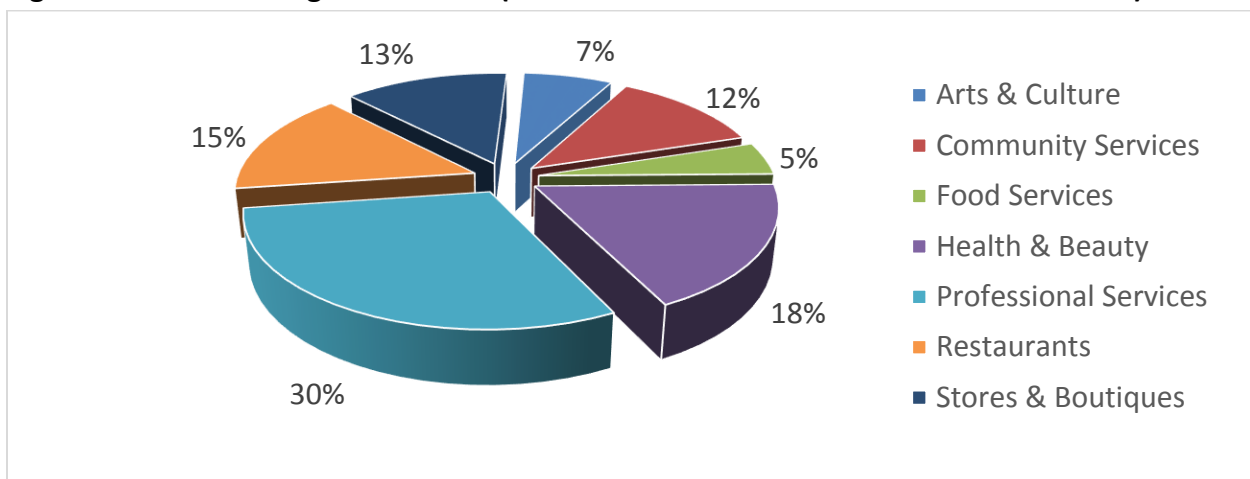
Basic overview [Table 1, Figure 2, Table 2]

The number of unique business locations in the Wellington West BIA increased by 6 from 586 to 594 from 2017 to 2018. The number of BIA members – excluding home-based businesses and properties owned by charitable organizations, religious institutions or the city of Ottawa - increased from 533 to 542. The BIA is also home to 7 municipal parks and 16 parking lots.

In 2018 the BIA revamped its directory system. As part of this project, businesses were assigned to new categories that had not been used in the past.

Table 1. Basic profile (How big and diverse are we?)

	2018	2017	2016
Total number of unique non-residential locations: (includes businesses, non-profits, parks, surface parking lots; excludes home-based businesses, street food vendors)	594	586	575
Non-members - properties not included in the BIA levy	52	53	51
BIA members:	542	533	524
Number of municipal parks:	7	7	7
Number of surface parking lots:	16	16	16

Figure 2. Business categories in 2018 (what kind of businesses are located in the BIA?)**Table 2. Business by major category, 2016, 2017, 2018**

	2018
Arts & Culture	7% (38)
Community Services	12% (65)
Food Services	5% (25)
Health & Beauty	18% (96)
Professional Services	30% (161)
Restaurants	15% (80)
Stores & Boutiques	13% (70)
Number of businesses (excluding vacancies)	535
Number of vacant locations	59
Total Number of Locations	594

	2017	2016
Arts & Theatre	6% (31)	5% (29)
Community Services	9% (50)	10% (53)
Food & Drink	19% (99)	19% (103)
Retail & Fashion	18% (95)	19% (102)
Professional Services	11% (56)	9% (50)
Automotive	4% (21)	4% (22)
Health and Beauty	17% (88)	16% (84)
Marketing, Communications, Technology	7% (39)	7% (37)
Property Management, Development, Design	6% (34)	6% (33)
Parking	3% (16)	3% (16)
Number of businesses (excluding vacancies)	529	529
Number of vacant locations	57	46
Total number of locations	586	575

Of the 16 surface parking lots dispersed throughout the area, 9 are reserved and require permits for business employees, while the remaining 7 are for public use, subject to fees (daily or hourly rates) or time limits [Figure 3].

This year a separate survey module about parking was introduced. When asked how difficult it was for customers to find parking, the average response from businesses was 3.0/5. With 5/5 meaning that finding parking is a serious problem. When asked the same question about employee parking, the average of all responses was 2.4/5. 72% of businesses had some parking available to employees. Additionally, 43% of businesses said that at least one employee used street parking during business hours.

The BIA actively promotes the arts as a key business sector. Even though the **Arts & Culture** category represents only 7% of businesses, some of these entities serve as landmarks in the BIA [Figure 4]. The Cube Gallery hosts many art events such as the 1st Thursday Art Walk. In the centre of the BIA is The Great Canadian Theatre Company, which has been operating in the BIA since 2007. Hintonburg has the largest concentration of arts – the old Gladstone Factory is home to the Enriched Bread Artists and Clayworks Coop, with the Loretta Studios and Gallery nearby. These collective artists have open studios and events throughout the year. Artists tend to congregate in clusters, mostly near Holland/Wellington and Gladstone/Laurel.

Figure 3. Private and public parking in the WWBIA

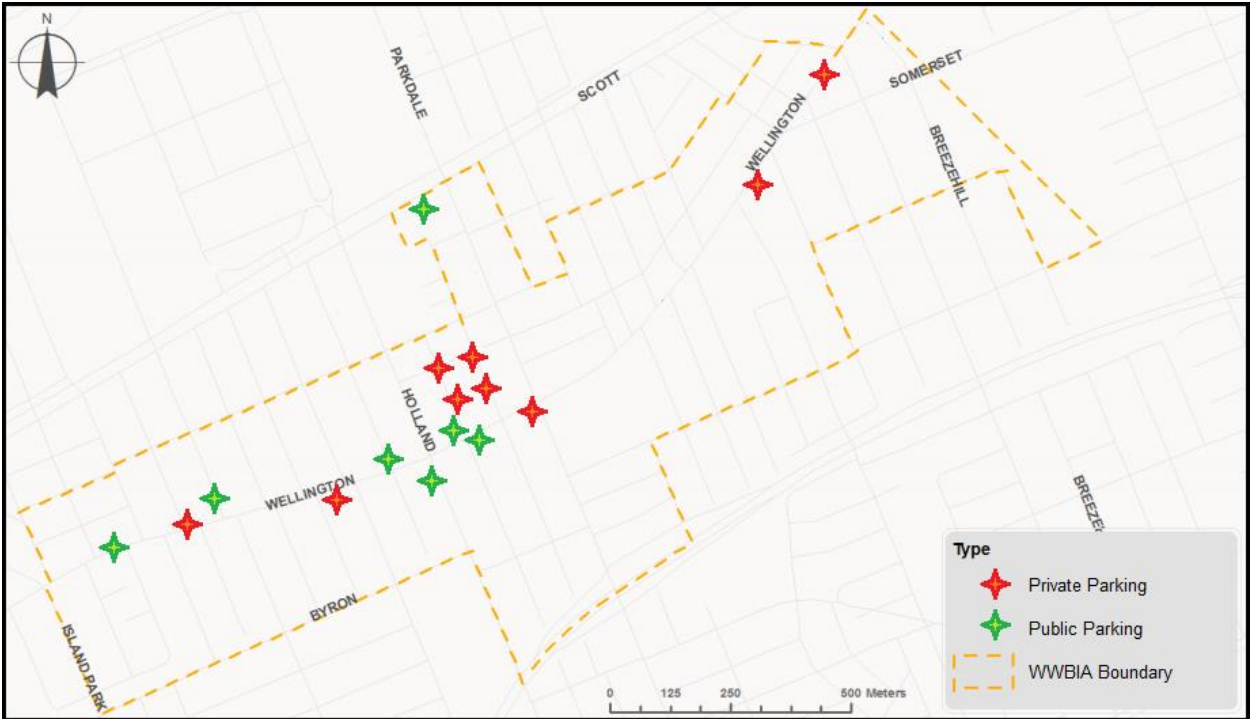
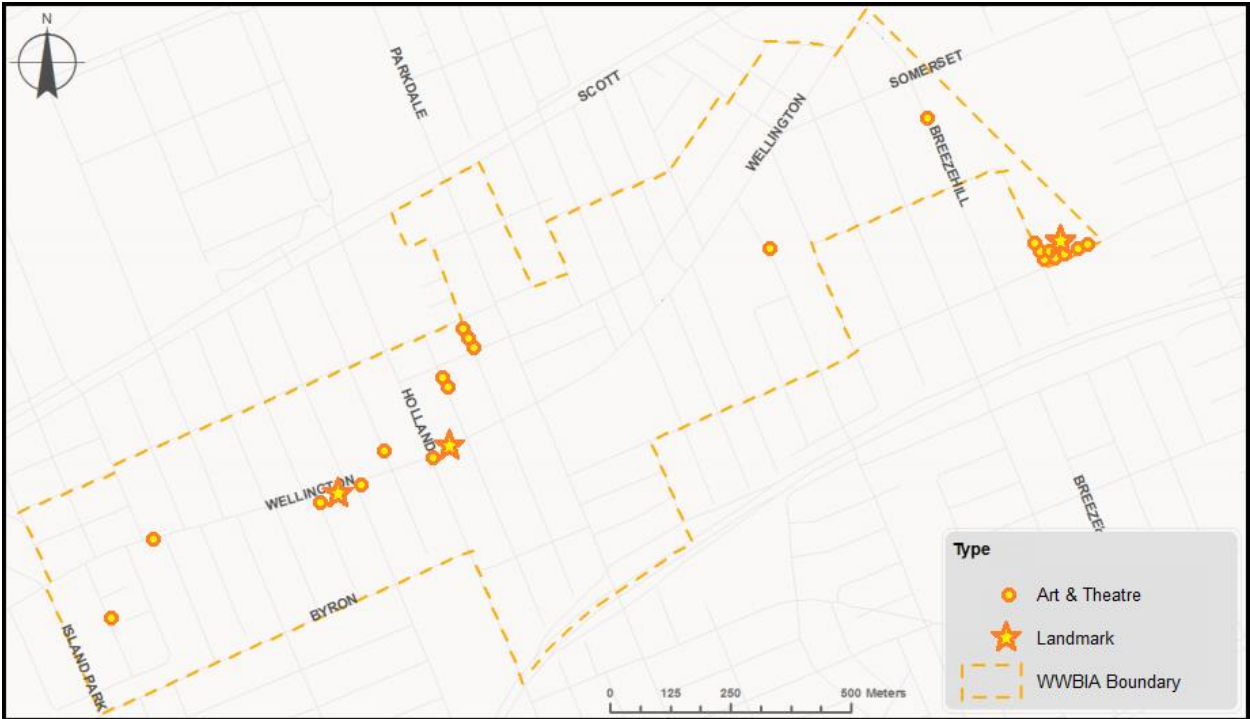


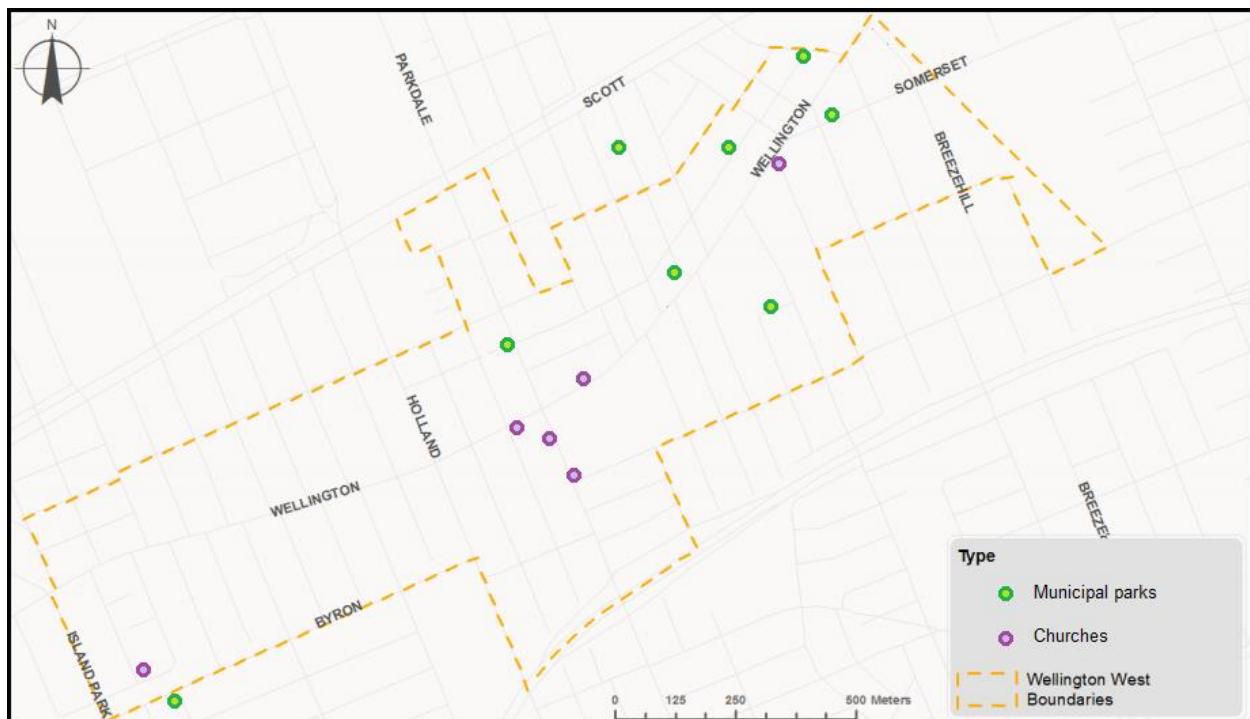
Figure 4. Arts & Theatre locations and landmarks



Food Services and **Restaurants** represent 20% of businesses, with **Stores & Boutiques** representing 13%. The majority of the food and retail businesses in the BIA are small, one-of-a-kind businesses that offer distinctive dining and Canadian-made items. Many restaurants in the BIA are highly rated fine dining establishments, such as Supply and Demand, Absinthe and Carben Food + Drink. The fashion industry in the BIA stayed strong, with popular boutiques such as Muriel Dombret, Twiss & Weber and Flock Boutique continuing to flourish. Some other specialized stores in the BIA are the Record Centre, Blumenstudio and A World of Maps.

Community Services represent 12% of businesses, and includes municipal parks, churches, schools, community centers and not-for-profit organizations [Figure 5]. Community Service are diverse and bring people young and old to the neighbourhood. The Ottawa West Community Support offers transportation for seniors to get to appointments. For 6 years, the Hintonburg Community Centre has been hosting the Luero Open – an annual charity badminton tournament sponsored by local businesses such as Giant Tiger Xpress and Restore Clinic.

Figure 5. Locations of parks and churches in the WWBIA



The **Health & Beauty** category represents 18% of businesses and include a wide range of services, including doctors, health clinics, fitness centres, salons, spas, haircutting and personal training. Majority of these businesses or clinics offering specialized services, such as Mint Hair Studio, Wheelhouse Cycle, Island Park Dental, and Forbes Beauty Co.

Professional Services (30%) include businesses operating in the areas of finance, investments, law, policy, and research. Many businesses in the Professional Services category occupy an entire building, such as 6 Hamilton Ave. N, which has Canvas Pop, Tungsten Collaborative,

Raven Telemetry and more. Some other buildings with more than five professional businesses are 1066 Somerset St. W, 99 Holland Ave, 383 Parkdale Ave and 1306 Wellington St. W [Figure 6].

Figure 6. Locations of buildings with five or more businesses



Vacancies have increased from 57 to 59, with the percentage remaining largely unchanged, increasing marginally from 9.7% to 9.9%.

Marketing with social media [Table 3, Figure 7]

A large majority of businesses have some form of online presence. A Google search will show accurate locations on Google Maps for 87% of the businesses and 87% have a Google page (Google Places).

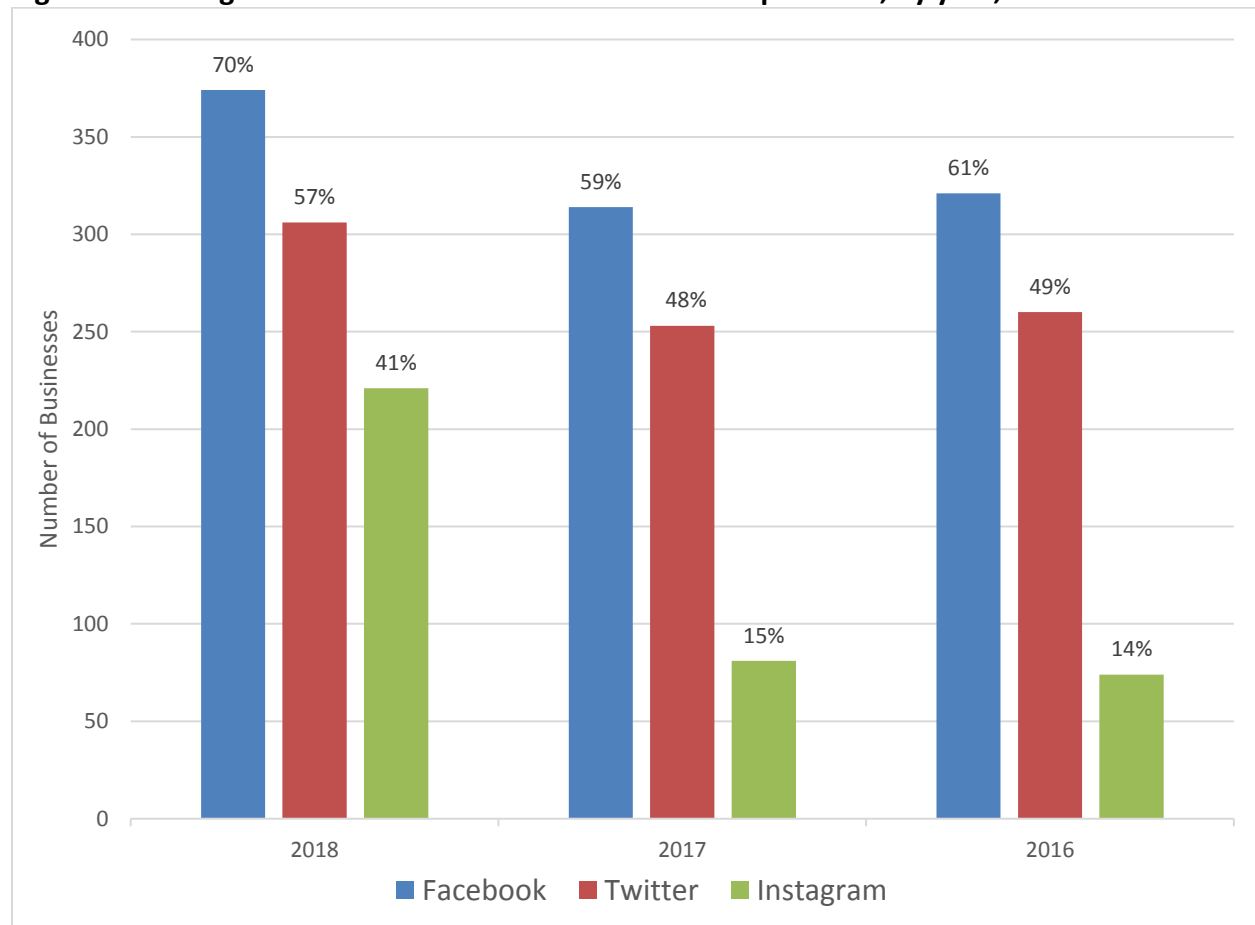
Table 3. Social media presence (How visible is our membership online?)

	2018	2017	2016
Locations with a website:	89% (475)	85% (452)	84% (447)
Locations captured in Google maps	87% (465)	87% (458)	73% (387)
Locations with a Google profile	87% (463)	78% (413)	70% (368)
Locations on Facebook	70% (374)	59% (314)	60% (320)
Locations with a Twitter account	58% (306)	48% (253)	49% (260)
Locations with a LinkedIn account	30% (161)	21% (109)	20% (107)
Locations with an Instagram account	41% (221)	15% (81)	14% (73)
<i>(number of businesses excluding vacancies)</i>	535	529	529

About 89% of non-vacant businesses have their own website – 30% (144) of those businesses are Professional Services, 18% (86) Health & Beauty, and 15% (74) Restaurants. Contact by phone is the most important for any given business, with 92% of active businesses having a phone number. Most businesses have at least one social media account.

Facebook remains the most popular form of social media, with 70% of businesses holding an account. Of the Facebook users 24% (88) are from Professional Services, followed by 20% (73) from Health & Beauty and 19% (72) from Restaurants. The second most popular social media platform is Twitter at 48% of all active businesses.

Figure 7. Wellington West BIA's increase in social media presence, by year, 2016-2018



This is the first year that more businesses have had an Instagram account (41%) than a LinkedIn account (30%).

Out of 535 businesses (excluding vacancies), only 161 or 30% of businesses had LinkedIn profiles. 53% (85) of these businesses were in Professional Services, with the next largest users of LinkedIn being Health & Beauty and Community Services both at 12% (20).

Instagram usage saw an increase from 81 to 221 businesses, representing 41% of all active businesses. Even though there are not as many Instagram users compared to Facebook or Twitter, Instagram posts gain the most “likes” per post then other social media, likely due to its simple photo sharing nature².

Only 28 businesses did not have a website and email, but had a phone number. This is down from 44 businesses in 2017.

The Wellington West BIA saw an increase in followers and likes for all social media accounts [Figure 7]:

- Facebook increased by 227 likes to a total of 4388
- Twitter increased by 668 followers to a total of 7433
- Instagram increased by 282 followers to a total of 4964

Business operations [Table 4, Table 5, Table 6]

Table 4 suggests that the BIA becomes much quieter after 5pm and on Sundays.

Many businesses are open Monday to Friday (32%) with just a small number (13%) of the businesses operating by appointment only. Some businesses close later than 9pm on Friday nights (14%) with the majority being eateries such as taverns, pubs, or bars. On the weekends, 198 businesses are open on both Saturday and Sunday, with 96 businesses closed on Sunday only. In the entire neighbourhood, there are 3 businesses open 24 hours, 7 days a week (Petro Canada, Mac’s Convenience Store and Quickie).

Table 4. Hours of operation (How busy is our street life?)

	2018	2017	2016
By appointment	15% (67)	13% (65)	13% (65)
Closed on Sunday	46% (201)	51% (258)	50% (254)
Closed on Monday	16% (71)	14% (72)	15% (74)
Open before 10:00am on Wednesday	50% (216)	55% (280)	56% (284)
Closing time occurs later than 5:00 pm on Wednesday	54% (234)	50% (251)	51% (259)
Closing time occurs later than 5:00pm on Thursday	57% (248)	51% (256)	53% (268)
Closing time occurs later than 9:00pm on Friday night	13% (55)	14% (73)	19% (96)
<i>(number of businesses with posted business hours)*</i>	435	506	506

**excluding vacancies, municipal parks, and parking lots*

² See <https://www.dreamgrow.com/instagram-facebook-advertising/> for a comparative analysis of the effectiveness of different social media platforms as marketing tools.

Most of the businesses that have been operating in the BIA for more than 50 years are churches and heritage buildings, and represent 5% of the total. About 10% of businesses have been operating for over 30 years and have established a strong reputation in the area. Many of these businesses, such as Morris Formalwear, West Park Lanes, and Lauzon, have been passed down generations and have become neighbourhood mainstays. 23% of businesses have been active for 5-10 years, 23% for 11-30 years, and 44% have been in operation for less than 5 years.

Table 5. Business changes (How many businesses come and go?)

	2017-2018	2016-2017	2015-2016
Vacant businesses	47	47	36
Vacant properties	12	10	10
Continued vacancies	38	28	19
No longer vacant	22	15	26

Table 6. Years of operation (How long have businesses been here?)

	Number of businesses
Less than 5 years (2013-2018)	44% (186)
5 – 10 years (2012-2008)	23% (97)
11 – 30 years (2007-1988)	23% (98)
31 – 50 years (1987-1968)	5% (23)
More than 50 years (up to 1967)	5% (21)
<i>(number of responses)</i>	425

Survey Module: Local economic impact [\[Figure 8, Figure 9\]](#)

To assess the level of business productivity, the census included a survey module focused on local economic impact. Questions were asked about general yearly sales and employment. Out of the 321 responses, 27% of business said their sales were the same as 12 months ago, compared to 62% in the previous year. More businesses (45%) experienced an increase in sales than businesses that said sales were lower (13%).

In previous years the survey has asked businesses whether they have hired more or less staff since the same time 12 months ago. This year, that question was removed in favour of a more detailed question breaking down the number of full-time, part-time, and minimum wage staff businesses have.

Based on the survey, 74% of businesses had up to 10 hired staff, including the owner, full-time and part-time workers. Only 15% of businesses hired 11-20 employees, and 11% hired over 20. Businesses that hired up to 10 employees were mostly in the Professional Services, Health & Beauty, and Stores & Boutiques categories at 29%, 20% and 22% respectively. The average number of total staff for a business was 11.1.

Figure 8. Sales in the last twelve months (How are businesses doing?)

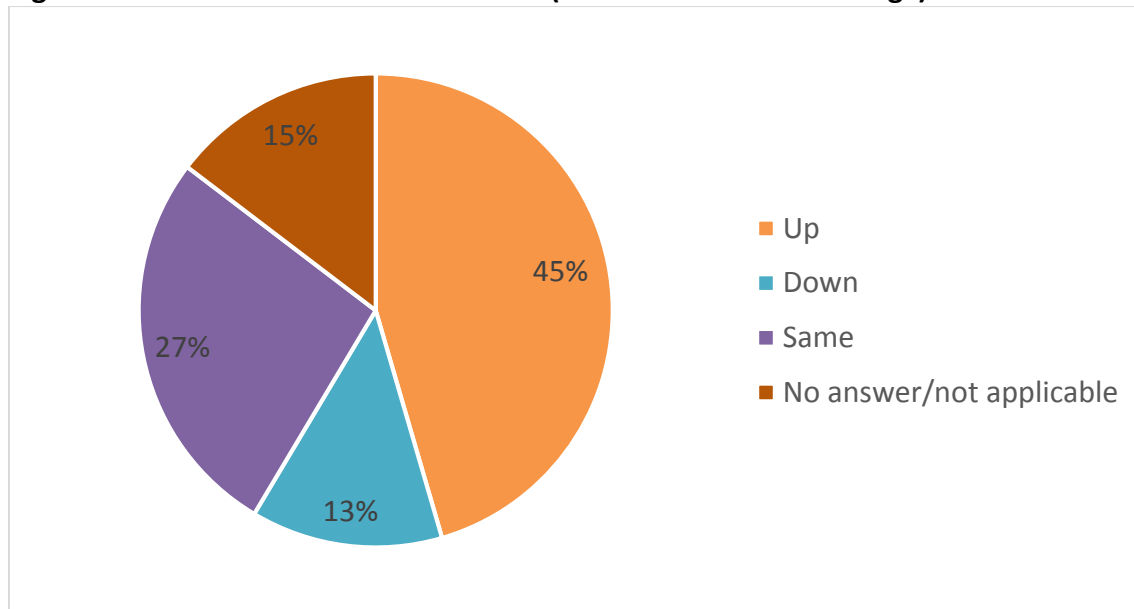
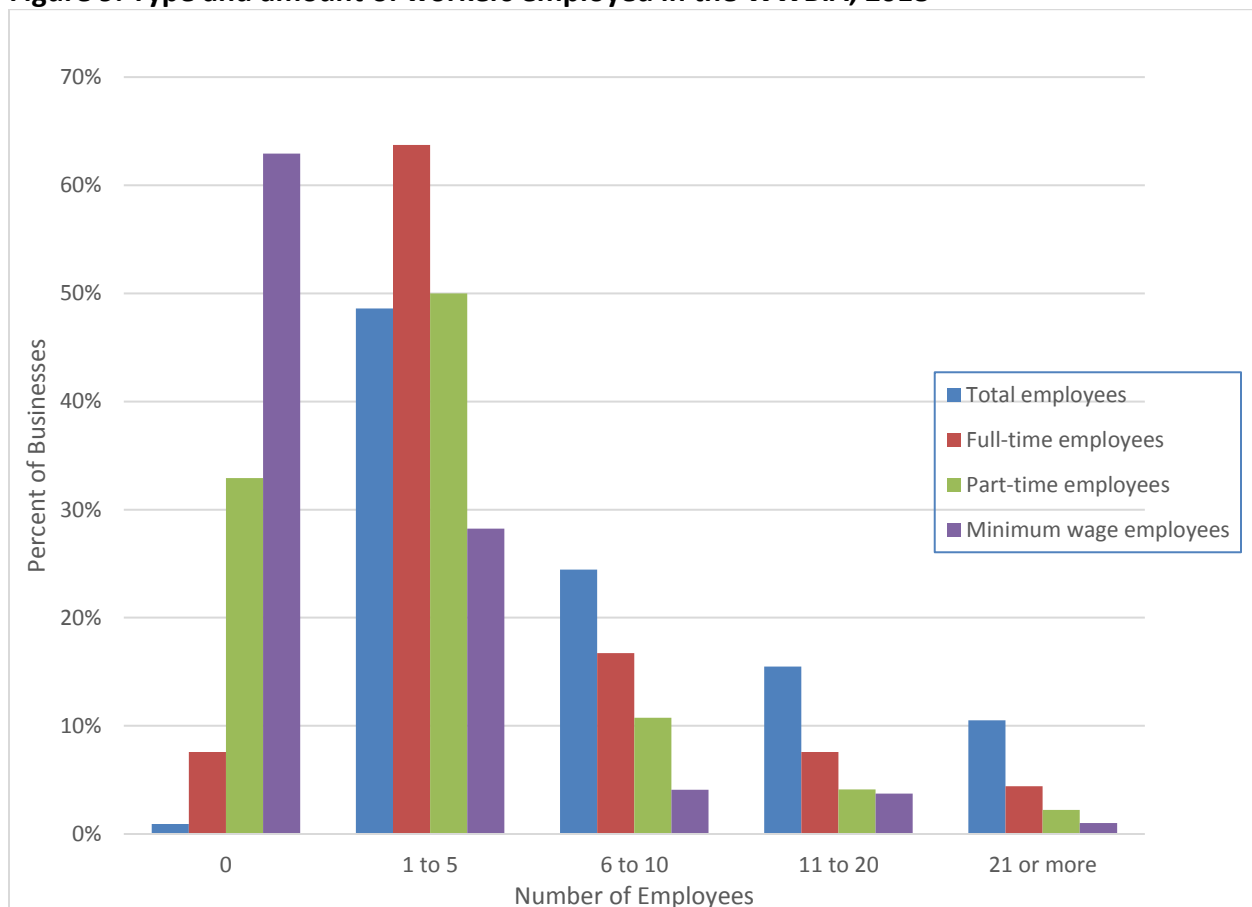


Figure 9. Type and amount of workers employed in the WWBIA, 2018



The majority of businesses (63%) had no minimum wage staff, and 28% of businesses had between 1 and 5 minimum wage staff. Of the 109 businesses that reported having minimum wage staff, 33% were from the Restaurants category, followed by 25% from Stores & Boutiques, and then 16% from Health & Beauty. The fewest businesses with minimum wage staff were from the Arts & Culture category (4%).

64% of businesses had 1-5 full time staff, and 4% had 21 or more full-time staff.

Business changes and vacancies [Table 5]

The 2018 census counted a total of 59 vacant businesses and properties, with 38 of these continued vacancies from 2017 and 22 no longer vacant.

Twelve of the 59 vacancies are vacant properties, generally on standby for future development. For instance, the four vacant properties on Parkdale Ave have proposals for mixed-use condominiums.

24% of businesses have a lease up for renewal in the next two years.

Changes to the census [Table 7]

Overall 74% of businesses were subject to some kind of change in the census. These are changes to:

- hours of operation
- email
- social media
- keywords
- new location due to either subdivision of existing location or construction of a new building
- new business
- closed business
- name change
- location change

Each business location is given a unique identification number (UID). In locations with two or more operating businesses, multiple UIDs are made for that address. This year the total number of UIDs increased by seven.

Any home-based businesses that displayed a storefront sign at their location in the BIA boundary was included in the census as an associate member. These businesses are operating in the BIA but do not pay a levy due to their property being residential. Home-based businesses found online through web searches but without signage at the physical location were not counted.

Table 7. Census spreadsheet changes

	2018	2017	2016
Added UIDs (new vacancies, new locations)	32	18	19
Removed UIDs (vacancies, merged locations, corrections)	25	7	19
UID count difference	7	11	0
Total changes	422	108	144

Current new development with a commercial component

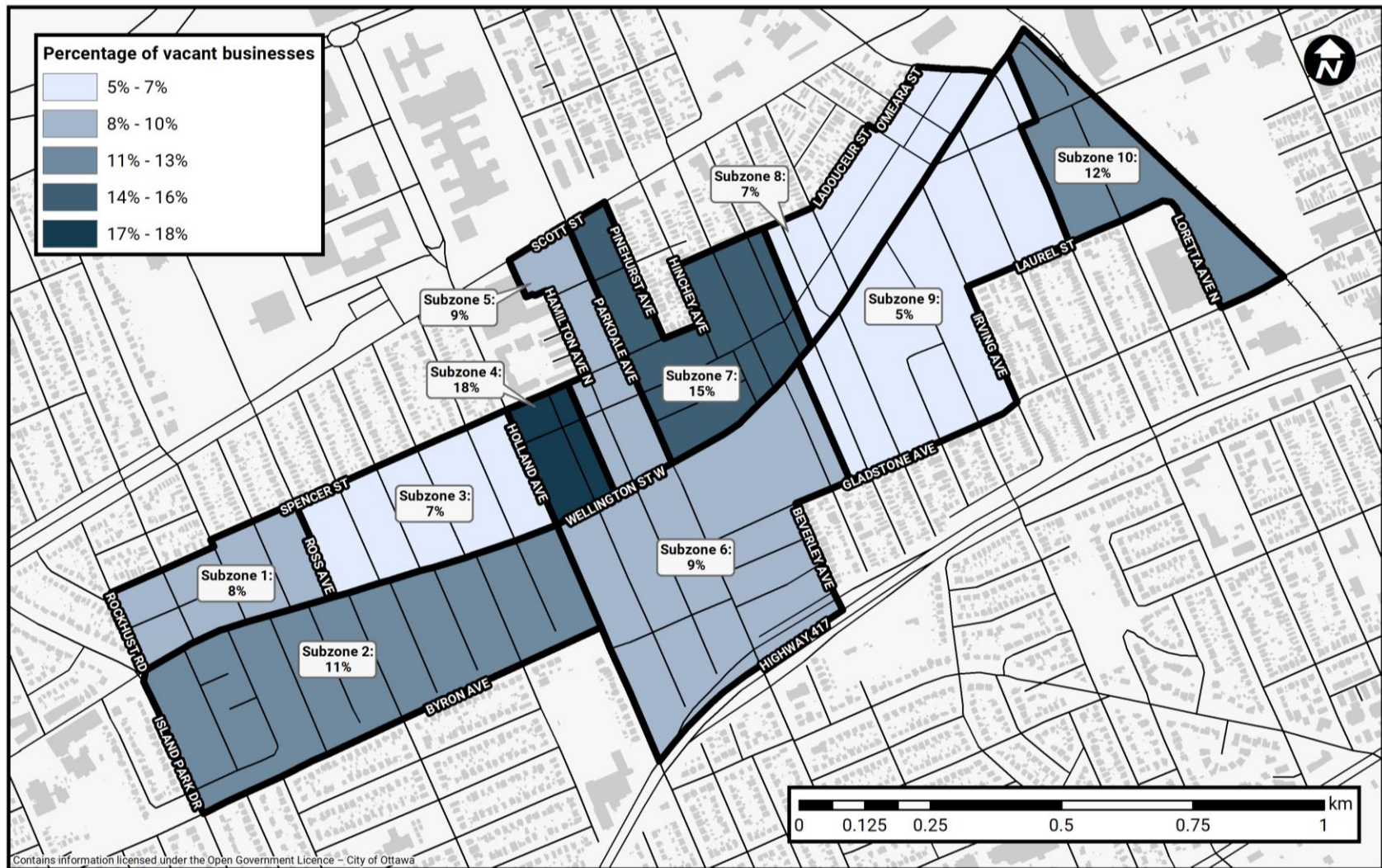
Mizrahi Developments is developing a 12-storey mixed-use condominium with an outdoor patio on the west end of the boundary at 1445-1451 Wellington St. West across from Island Park Esso.

A new residential building currently in preconstruction is located at 979 Wellington Street West. This building will include 57 rental units and 2 retail units.

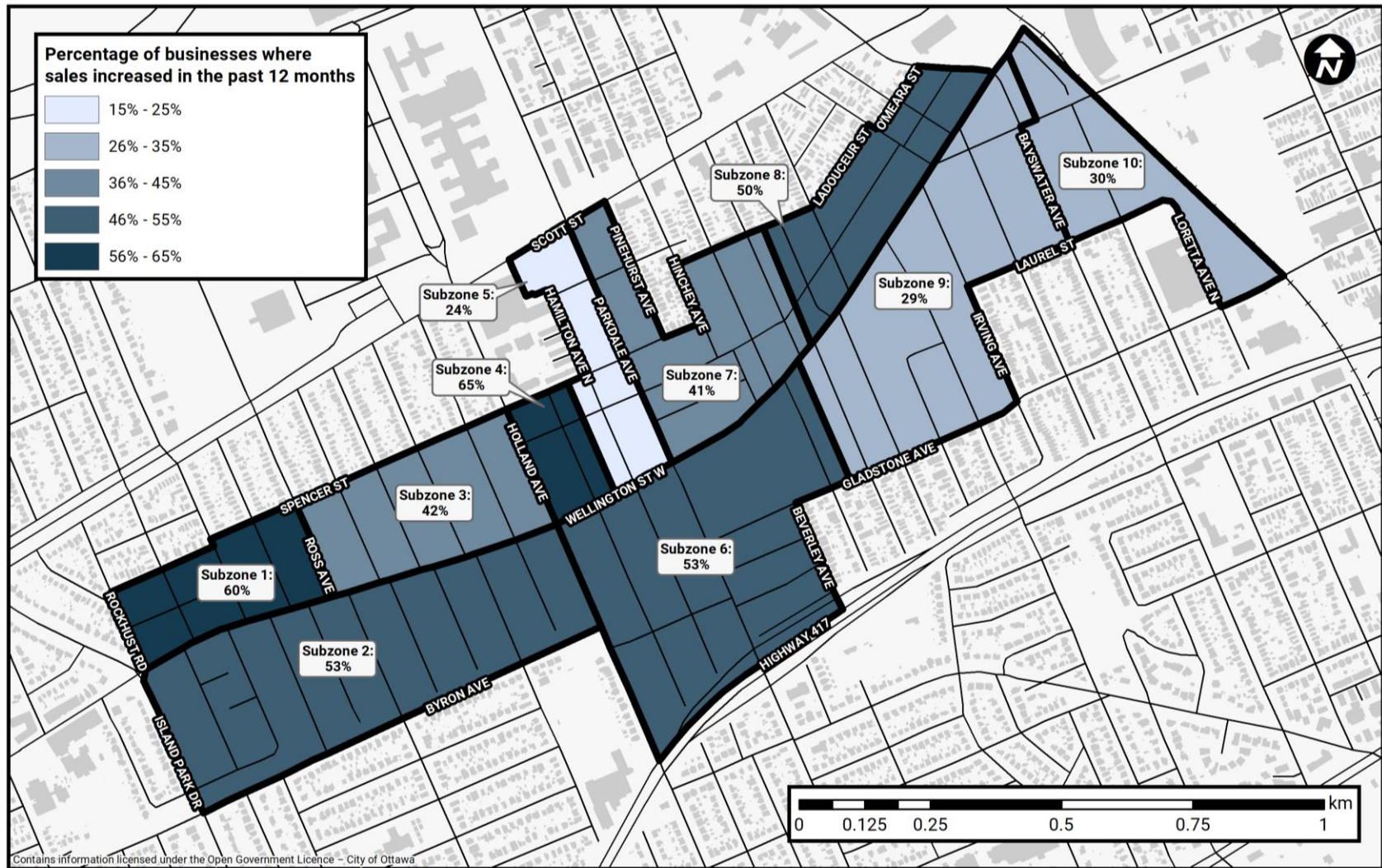
On the east end of the BIA, Claridge Homes have proposed two mixed-use condominium towers at 1040 and 1050 Somerset St. West, now home to CompuCorps and CrossFit Bytown. The building at 1050 Somerset Street West will have a height of 23 storeys including a 3-storey to 5-storey podium. The building at 1040 Somerset Street West will have a height of 30 storeys including a 4-storey podium. The proposed buildings would house 271 condominium apartments and 567 square metres of at-grade commercial space, with entrances on Somerset St. West. The main residential entrance is planned for Breezehill Ave. North.

Annex 1: Maps

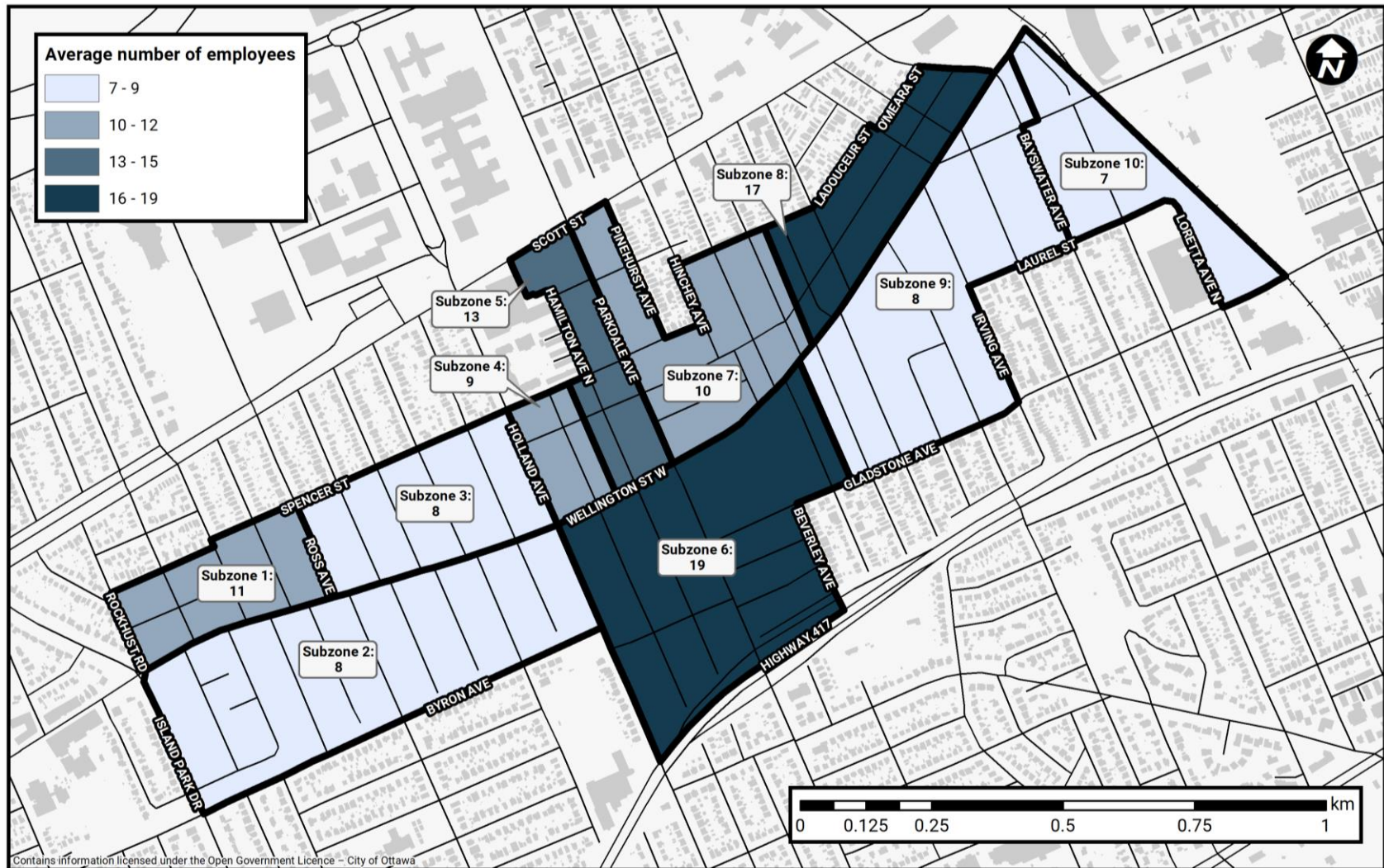
Map 1 Vacant businesses by subzone



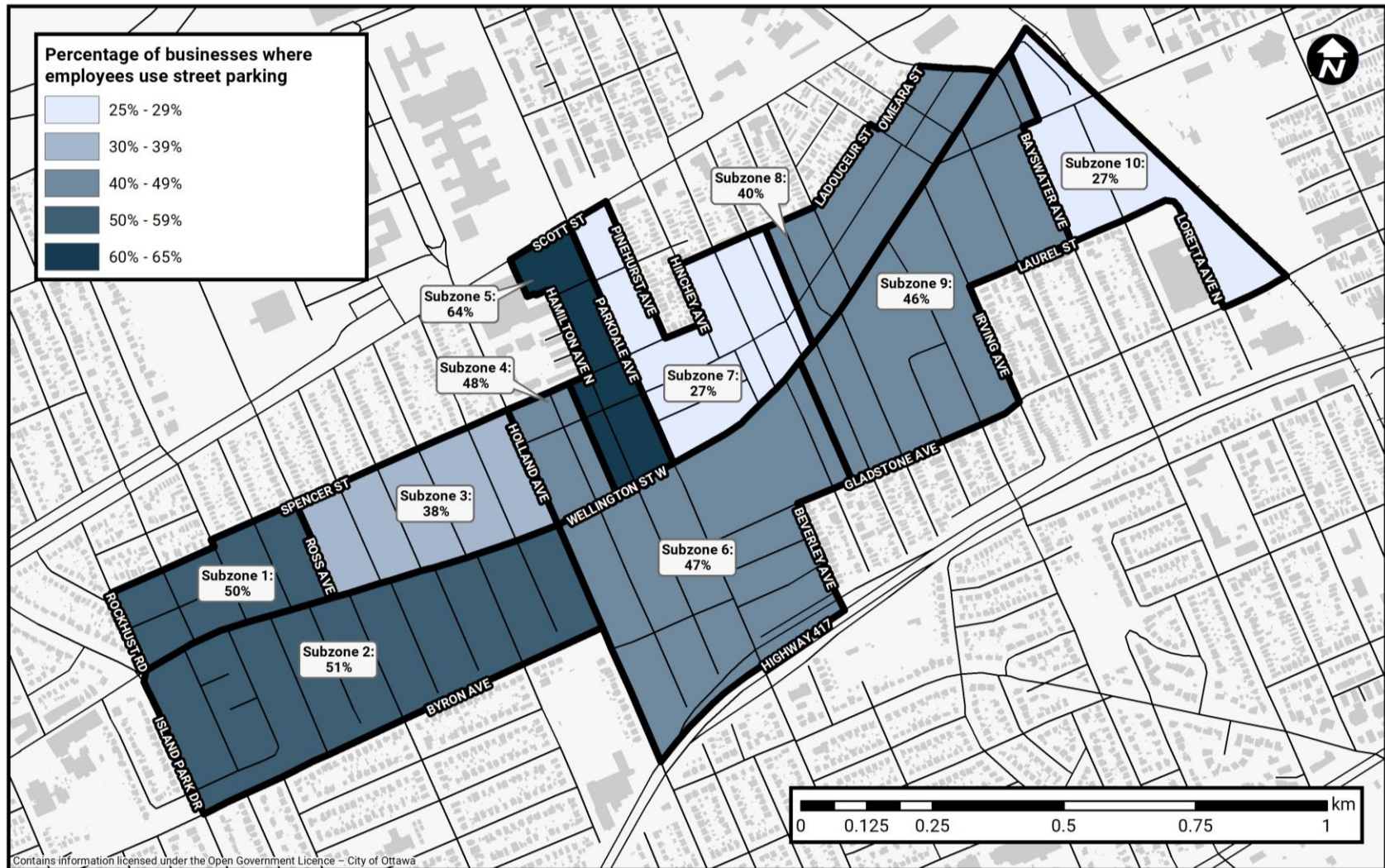
Map 2 Businesses that have increased sales in last 12 months by subzone



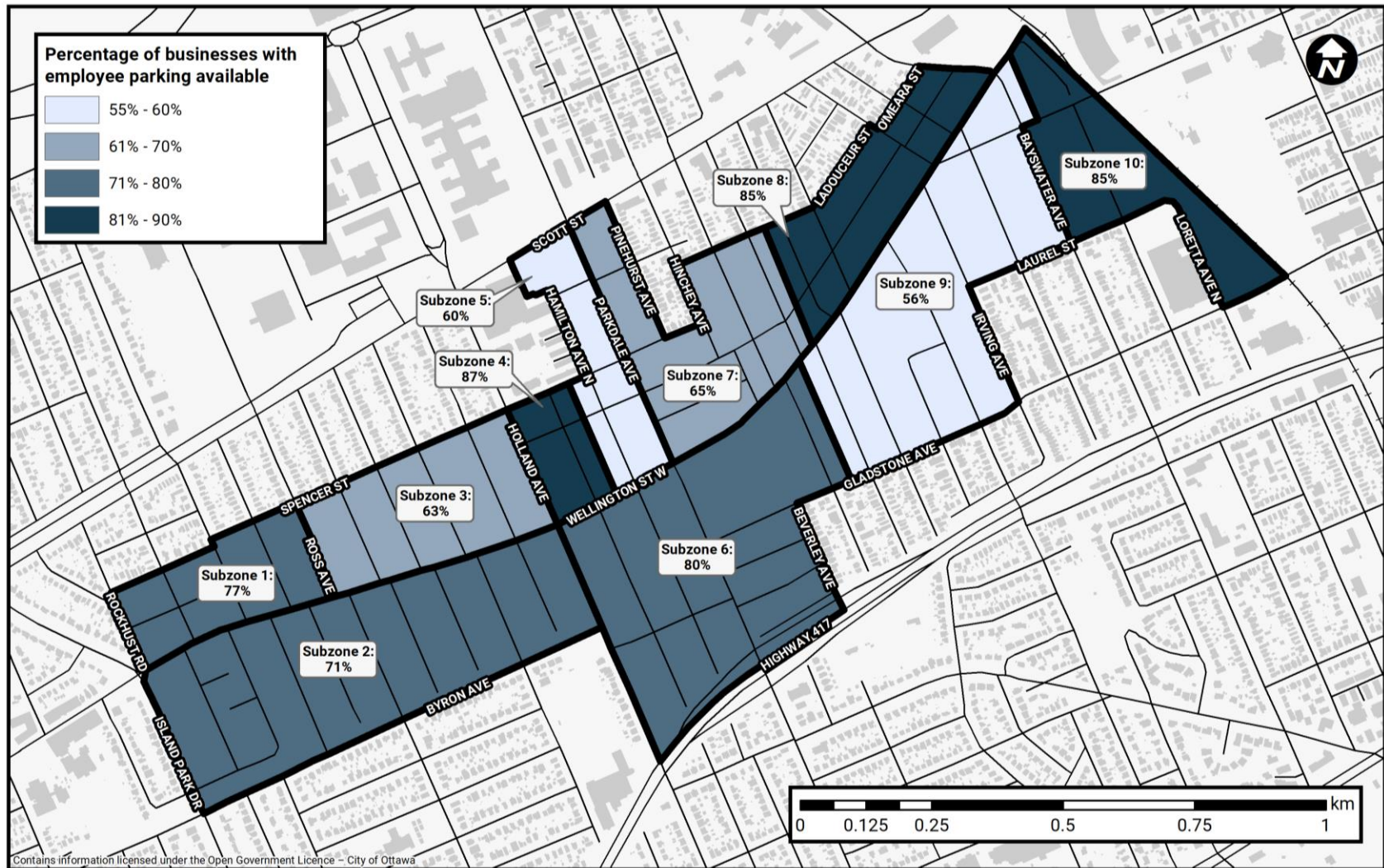
Map 3 Average number of employees by subzone for all business categories



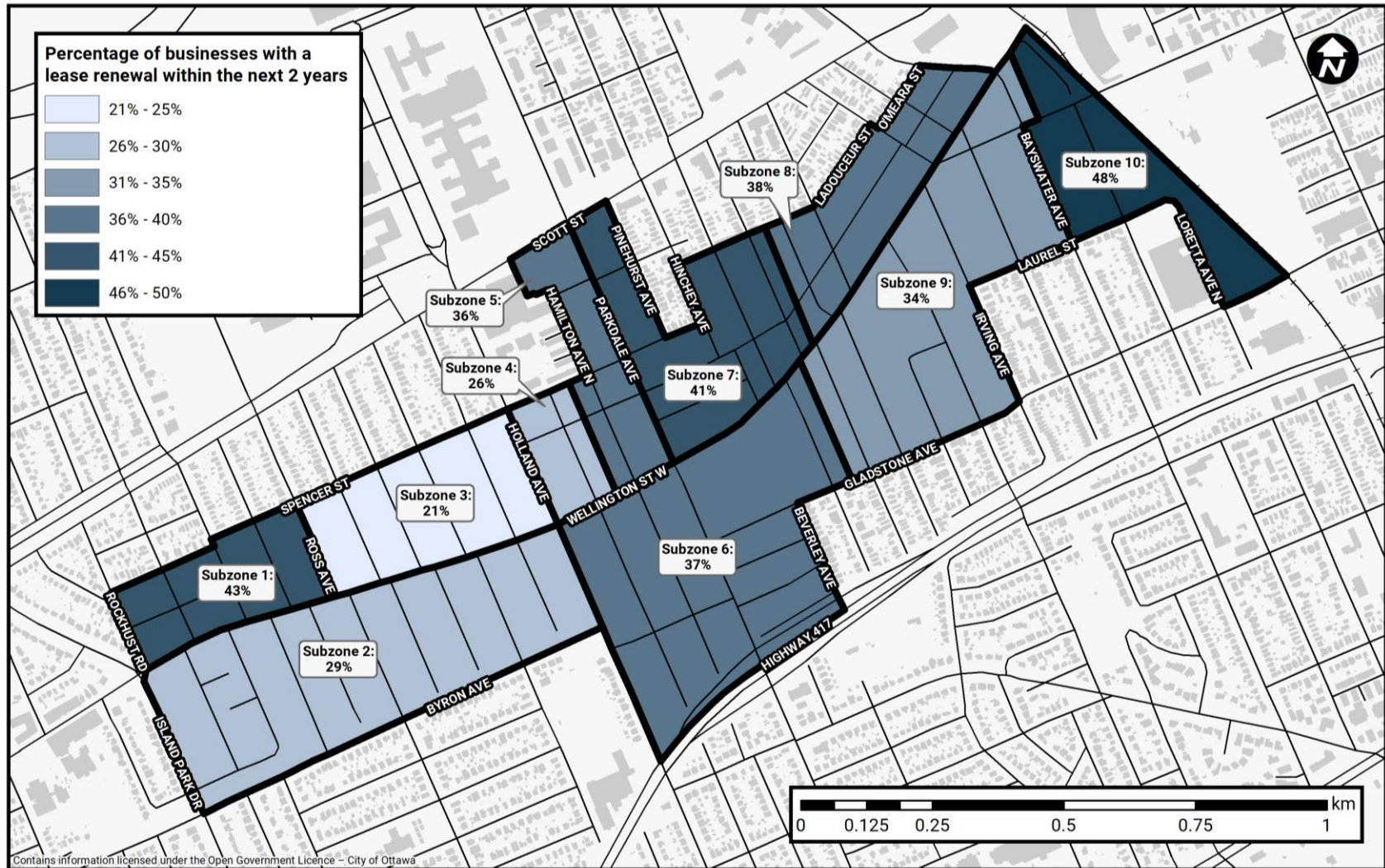
Map 4 Businesses where employees use street parking by subzone



Map 5 Businesses with employee parking available by subzone



Map 6 Businesses with a lease renewal within the next 2 years by subzone

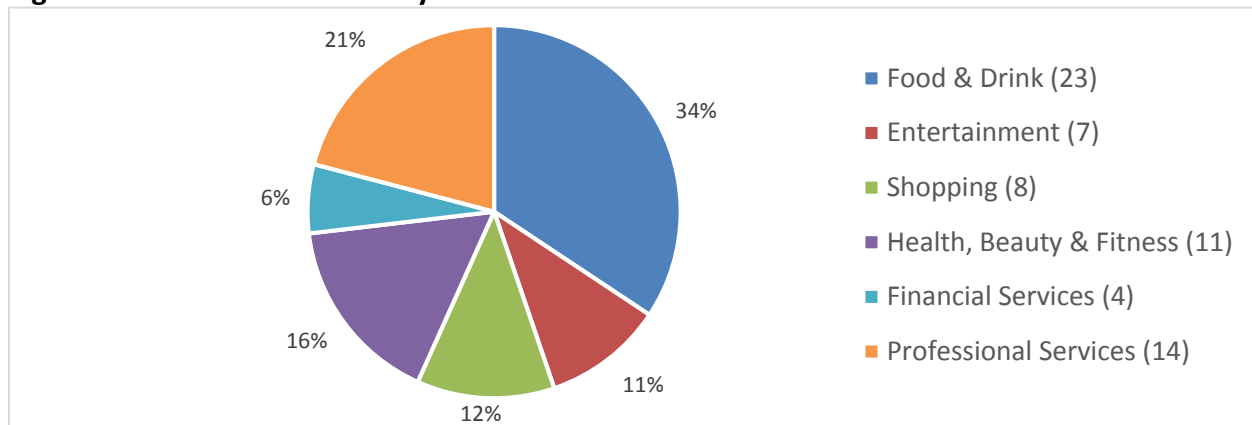


Annex 2: Basic Profile of Surrounding BIAs

Preston BIA (118A Preston St. Ottawa, ON. K1R 7P2)

The Preston Street BIA was formed in 1986 and represents Preston Street north to south from Albert Street to Carling Avenue. It is 1667.61m in length with a \$340,000 annual budget (2015). Known as “Little Italy”, the Preston Street BIA is home to 67 businesses, with the majority being eateries. The neighbourhood has been hosting Italian Week Festival every June since 1974.

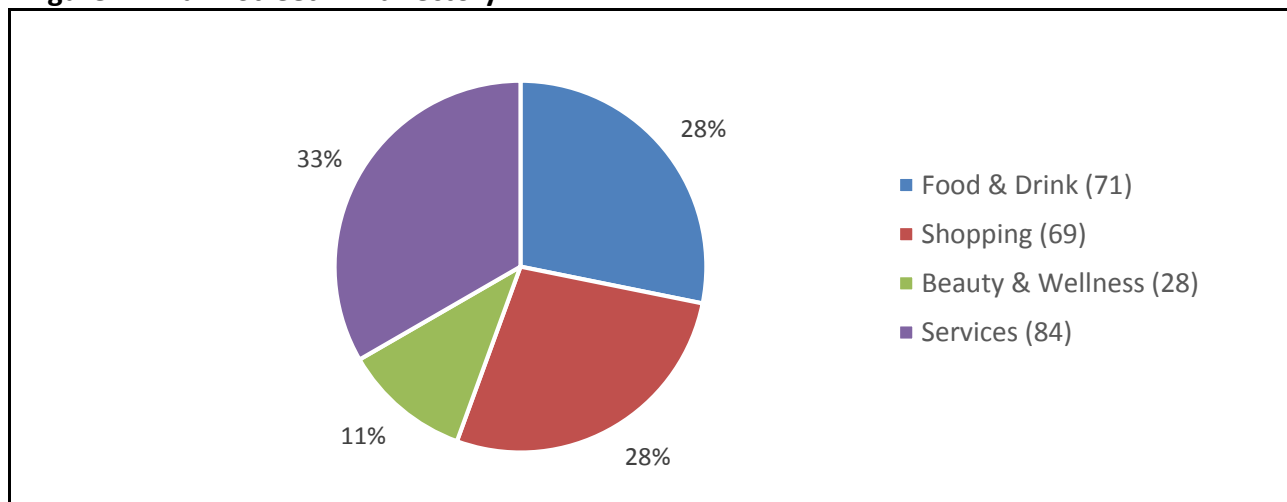
Figure 10. Preston BIA directory



Bank Street BIA (176 Gloucester St. Ottawa, ON. K2P 0A6)

The Bank Street BIA was established in 1977 and is one of the oldest BIA's in Ottawa. The length of the street is about 1251m from Wellington St. West to Gladstone Avenue. This BIA has a large annual budget of \$700,000 (2015). The Bank Street BIA oversees 252 businesses, with smallest proportion of businesses in Beauty & Wellness (11%).

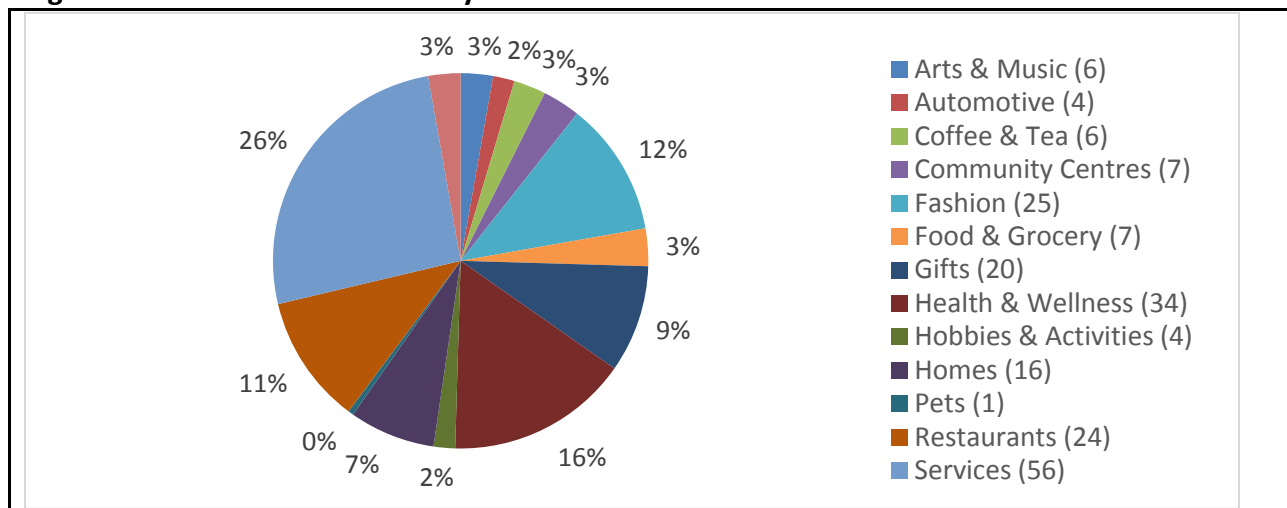
Figure 11. Bank Street BIA directory



Westboro BIA (261A Richmond Rd. Ottawa, ON. K1Z 6X1)

The Westboro BIA was established in 1979 and stretches east to west from Island Park Drive to Golden Avenue, approximately 1525.25m in length on Richmond Road with a \$270,000 annual budget (2015). Westboro BIA represents 220 businesses, the majority of businesses in the services category. There is a total of 14 categories, each specific to the type of business.

Figure 12. Westboro BIA directory



Somerset Chinatown BIA (5-299 Bronson Ave. Ottawa, ON. K1R 6J1)

The Somerset Street Chinatown BIA was formed in 1989 and extends from Bay Street to Preston Street on Somerset St. West, approximately 1040m in length. The Somerset BIA has an annual budget of \$145,000. In this BIA are 120 businesses, the majority being restaurants (31%). The Ottawa Chinatown Gateway, completed in 2010, serves as the official landmark to Chinatown.

Figure 13. Somerset Chinatown BIA directory

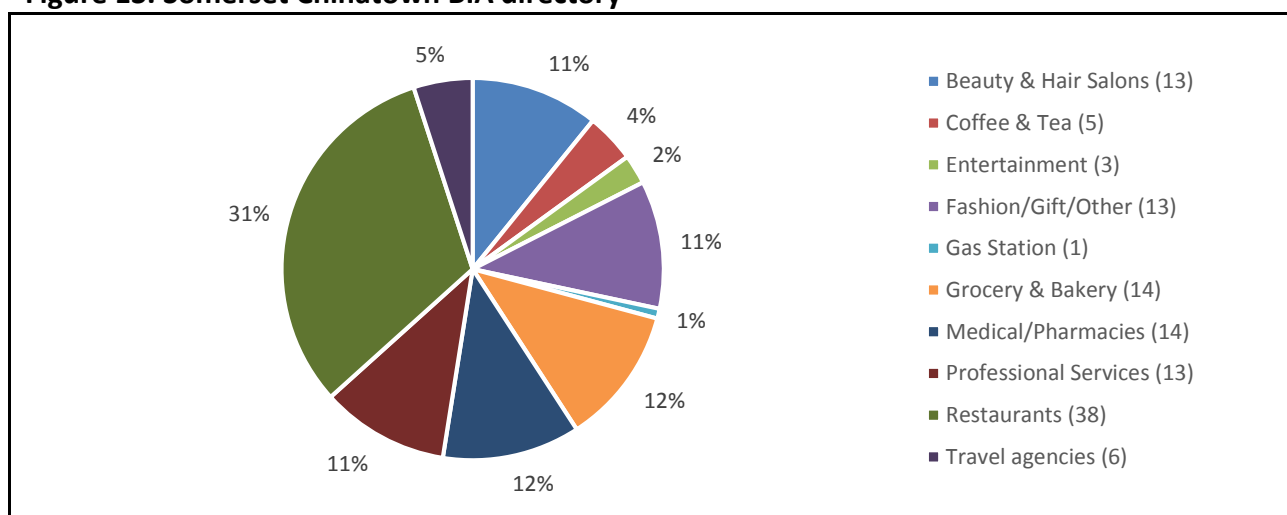


Table 8. Social media use by Ottawa BIAs

	Wellington West	Westboro	Bank Street	Downtown Rideau
Website	wellingtonwest.ca	westborovillage.com	bankstreet.ca	downtownrideau.com
Facebook	4,161 likes	2,348 likes	5,523 likes	3,164 likes
Twitter	6,765 followers	5,567 followers	4,190 followers	4,889 followers
Instagram	4,681 followers	1,923 followers	4,621 followers	1,346 followers
	Preston	Glebe BIA	Quartier Vanier	Kanata North
Website	prestonstreet.com	intheplebe.ca	vanierbia.com	kanatanorthbia.ca
Facebook	1,217 likes	6,921 likes	3,039 likes	743 likes
Twitter	686 followers	3,795 followers	1,423 followers	3,525 followers
Instagram	1,074 followers	1,560 followers	681 followers	584 followers
	Byward Market	Sparks St Mall	Heart of Orleans	Somerset Chinatown
Website	byward-market.com	sparkslive.com	heartoforleans.ca	ottawachinatown.ca
Facebook	6,899 likes	20,537 likes	1,728 likes	2,336 likes
Twitter	11,146 followers	7,440 followers	1,597 followers	1,166 followers
	Bells Corners	Barrhaven	Manotick	Carp Road
Website	bellscornersbia.ca	barrhavenbia.ca	manotickvillage.com	carproadbias.ca
Facebook	302 likes	1,562 likes	3,565 likes	--
Twitter	917 followers	1,226 followers	1,970 followers	--

as of August 29, 2017

Sparks Street has the highest number of Facebook likes (20,537), followed by Byward Market (6,899) and Wellington West (4,161).

Byward Market has the most Twitter followers (11,146), followed by Sparks Street (7,440) and Wellington West (6,765).

Wellington West has the most Instagram followers (4,681), followed by Bank Street (4,621) and Westboro (1,923).

