

The Visitor Economy and Main Streets in a post-pandemic world

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Executive Summary

Main Streets are the economic and cultural hubs of communities across Canada, reflecting and creating local culture, providing employment and entrepreneurial opportunities, and improving quality of life. Many Main Streets are represented by Business Improvement Areas (BIAs) who work on behalf of their members to enhance the community. BIA communities have seen existing challenges, such as shifting retail habits and increasing costs of business, exacerbated by COVID-19 and the subsequent government restrictions and change in public behaviour and motivations.

BIA communities are destinations for many groups visiting from outside of the immediate area who bring economic and cultural impacts. COVID-19 has affected visitor demand, both in volume and types of groups, and the services they seek. At a time when BIAs are re-imagining their efforts and goals for the near and mid-term future, there is opportunity to integrate considerations for the visitor economy into cultural and economic development plans. BIAs can identify and influence the type of visitation that best suits their community and members. There is value in applying a ‘tourism destination’ lens to many BIAs, and considering the impacts and opportunities of visitor groups within strategic planning.

This report summarises conversations with 47 people representing 33 BIAs and 12 related organizations across eight Provinces in Canada held between August and November 2020. Some key findings include:

- Many BIAs have seen substantial challenges since COVID-19, with business closures, increased social issues, and uncertainty for the future, exacerbating previous issues of increased costs for small businesses, changing demand and competition from online retail, and more.
- Most Main Street areas have seen decreased visitor volume; however, some have seen increased volume from different visitor groups.

- BIA member engagement and participation has increased, as businesses seek collaboration and support to work through the challenges they face.
- BIAs have spent more efforts advocating, offering and facilitating grants and subsidies, workshops and seminars, and distilling and disseminating information on changes to government requirements and supports.
- Many BIAs altered events to maintain some animation within public health guidelines. New experiences, such as expanded patios, cycle paths, and art installations have been established.

Given the uncertainty that Main Streets find themselves in as a 'new normal' evolves, there are some broad areas for BIAs to consider relating to the visitor economy:

1. A focus on **resident engagement** to develop and evolve storytelling and the **cultural identity and distinctiveness** of a community, making the area a more vibrant place to live and offering visitor experiences consistent with local interests. This can feed into a visitor economy strategy.
2. Build upon and **maintain relationships with (more local) visitors** who have spent time in the community since the pandemic, and give reason for them to re-visit and share their experiences.
3. Consider the **enduring changes** caused by the pandemic, and **implications and opportunities to engage new visitor groups**. For example, migration to lower density areas means potential for visiting friends and relatives, renewed interest in local experiences has refreshed regional travel motivations, and the unfortunate turnover of businesses means that experiences on offer may attract new visitor groups.
4. Establish and further **partnerships with Destination Marketing and Management Organizations (DMMOs) and other BIAs** to help propel visitor product development and consistent communications for the broader destination.
5. **Collect and analyze data** to identify, communicate, and measure trends and challenges, and the value of BIA initiatives.

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1. Introduction

Main Streets are the economic and cultural hubs of their communities, and across Canada hundreds are represented by Business Improvement Areas (BIAs)¹ or equivalent organizations. A BIA is “an association of commercial property owners and tenants within a defined area who work in partnership[s]... to create thriving, competitive, and safe business areas”². Main Streets are destinations, attracting visitors for both routine and extraordinary reasons, bringing diverse economic and cultural impacts. Many Main Streets and their members have been impacted substantially by the COVID-19 pandemic, and discussions on immediate and longer-term recovery and transition are underway³. The purpose of this report is to specifically consider the role and potential of the visitor economy in affecting the vitality of Main Street communities and BIAs.

The objectives of this report are to:

- Understand BIAs’ perceived value of the visitor economy
- Identify innovative initiatives to share among the BIA community
- Provide a foundation upon which BIAs may develop new initiatives
- Provide a foundation for more focused research projects

The research team from Ryerson’s Institute for Hospitality and Tourism Research, building on previous projects⁴, invited participants from organizations who appeared to be working on innovative initiatives relating to the visitor economy and strategic planning more broadly. Participants were identified through background research, as well as

¹ Government of Ontario (2010). *Business Improvement Area Handbook*. www.ontario.ca/document/business-improvement-area-handbook/introduction-business-improvement-areas

² TABIA. (2021). www.toronto-bia.com/whats-a-bia/

³ E.g. CUI. (2020). Bring Back Main Street. canurb.org/initiatives/bring-back-main-street/, The Institute of Place Management (2020). COVID-19 Recovery Framework. www.placemanagement.org/covid-19/

⁴ Griffin, T. (2020). An Exploration into Toronto’s BIAs’ Engagement of the Visitor Economy. www.ryerson.ca/htmresearch/research/current-research/bia-s-and-tourism-development/

suggestions from previous interviewees. In total 47 people were interviewed between August and November of 2020, representing 33 BIAs and 12 related organizations across eight Canadian provinces (see [Appendix](#) for full list). This report presents a summary and synthesis of interviewees' responses on the impact of COVID-19 and topics relating to the visitor economy.

There are some important points about this report:

- This report is not definitive. The results are based on interviews only, and do not account for all activities and opinions of the BIAs involved.
- This report does not quantitatively measure BIA activity or opinions, but rather seeks to synthesise and describe what was found through interviews.

The authors welcome communication from those in the BIA community who wish to further discuss ideas related to the topics covered. Based on this project, together with additional research, we are working on materials specifically designed to provide Main Street coordinators, downtown managers, and their committees on practical ways of introducing visitor strategies. For more information on this please contact Dr. Walter Jamieson (walter.jamieson@ryerson.ca).

2. The Visitor Economy

The 'visitor economy' is a broad term that concerns the economic activity of all visitors to a destination⁵. From a community's viewpoint, a 'destination' is a well-defined area, often decided by governmental boundaries. Alternatively, a 'destination' from a visitor's perspective is an area with a combination of services and experiences that will meet their needs and motivations, and depending on the visitor can therefore range from a country down to a neighbourhood. For a destination community, identifying and understanding the activity and impact of visitors is important for strategic development. 'Tourism' typically refers to visitors travelling for trips out of their usual environment for pleasure, visiting friends and relatives (VFR), business (but not for paid work in the destination), and other personal reasons, for less than one-year⁶. The 'visitor economy' then, is a broader term that concerns all visitors to a community who are not residents, within which 'tourists' are one group of many.



Figure 1: The 'visitor economy'

⁵ Hristov, D. (2015). Tourism versus the visitor economy and the shifting landscape of destination management. *Tourism: An International Multidisciplinary Journal of Tourism*, 10(1), 219-234. www.researchgate.net/publication/289505356_Tourism_Versus_the_Visitor_Economy_and_the_Shifting_Landscape_of_Destination_Management

⁶ Destination Canada. (2020). Glossary. www.destinationcanada.com/en/glossary

Engaging visitors should be appealing to BIAs for a few reasons. First, visitors bring external spending into the community supporting economic activity. Secondly, visitors' demand for services shape the community and the types of business and experiences that can thrive. This can bring additional demand for businesses that serve residents, but also new demand for different types of products and experiences.

Although the term 'economy' implies a focus on the financial impacts of visitors, considerations relating to the socio-cultural and environmental components of a community are important, both in terms of attracting visitors and the impacts that visitors have on a community's quality of life. More visitors may bring more money, but also bring traffic and waste, take up space that residents may resent, bring demand for products and services that may not be consistent with residential values, and bring additional health risks relating to the pandemic. These elements are important to consider when formulating any visitor economy strategy as they will impact both resident and visitor experiences with the destination.

Visitor volume and the services they consume can make the community a more vibrant and appealing place to live. However, developing the visitor economy also has the potential to create some element of reliance on what can be a fragile form of demand, causing tension with residents. Strategic consideration is important to encourage the benefits of the visitor economy, while predicting and managing potential challenges.

3. Impacts of COVID-19

Since March 2020, governments across Canada have discouraged and regulated social gatherings and travel⁷. Many interviewees described substantial declines in foot traffic as office workers, students, and visitors stayed home (e.g. Downtown London, Downtown Victoria, Regina Downtown, Spring Garden, Toronto Entertainment District, The Waterfront). For some BIAs in more residential areas, the decrease in footfall has been less substantial than others (e.g. Business Fredericton North, Quinpool Road).

The impacts of COVID-19 have exacerbated existing issues, including vacancies, increasing rents and taxes, competition with online-shopping⁸, and low margins (e.g. Downtown Red Deer, Kensington BRZ). Social issues including homelessness, drug abuse, and mental health, already a substantial concern before the pandemic, were reported by many to be much worse (e.g. Downtown Vancouver, Downtown Victoria, Downtown Yonge). Some BIAs noted that they have implemented and paid for increased security since COVID-19 began (e.g. Downtown Prince George, Spring Garden), while others have been leaning on existing security and cleaning teams to collect information and provide a presence (e.g. Downtown Vancouver⁹, Downtown Yonge, Exchange District¹⁰, Downtown Kelowna Association, North Edge, Downtown Red Deer).

Most interviewees commented on greater member engagement to work through the challenges COVID-19 brought (e.g. Downtown Kelowna Association, Downtown Orangeville, Downtown Red Deer, Downtown St. John's, Downtown Vancouver, Downtown Yonge, North Edge, Quinpool Road, Regina Downtown, Shipyards District, Sydney Downtown Development Association, Uptown Saint John). For example, sharing

⁷ University of Toronto Libraries. (2021). Canadian Government Information: COVID-19. guides.library.utoronto.ca/c.php?g=702478&p=5098930

⁸ Griffin, T. (2020). An Exploration into Toronto's BIAs' Engagement of the Visitor Economy. www.ryerson.ca/htmresearch/research/current-research/bia-s-and-tourism-development/

⁹ Downtown Vancouver BIA. (2021). Downtown Safety Ambassadors. www.dtvancouver.ca/what-we-do_trashed/safety-ambassadors

¹⁰ The Exchange District BIZ. (2021). Exchange Patrol. www.exchangedistrict.org/exchange-patrol/

sales figures, attending webinars, and participating in social media campaigns were all commonly mentioned. A number of interviewees also shared a greater sense of appreciation from members regarding the BIA's role and opportunities they provide. An increased sense of community and collaboration among BIA members has led to additional partnerships and packaging of services (e.g. Downtown London, Downtown Kingston!, West End BIZ). Maintaining and building upon this engagement will be vital for BIA communities and the associations themselves to recover and grow.

4. BIAs' Responses to COVID-19

A summary of key themes is shared below. For a review of initiatives by Toronto BIAs over the summer of 2020 please review the report linked in the footnotes¹¹.

4.1 Advocacy

Many BIAs were already advocating for their business community before the pandemic, but this has become a greater focus since spring 2020 (e.g. Downtown Prince George, Downtown Victoria, Kensington BRZ, Old Strathcona, The Waterfront). For example, seeking relaxed liquor laws, permits to expand patios, suggestions to reduce bureaucracy, requesting subsidies, tax breaks, and grants, and seeking clarity and tweaks to safety measures were all mentioned. To increase the effectiveness of their advocacy many BIAs participated in task forces or formed partnerships with other organizations (e.g. Downtown Canmore, Downtown Victoria, Kensington BRZ, Shipyards District, Spring Garden, Stratford City Centre). Many identified advocacy as a role their organization would continue to focus on in the near and mid-term future.

4.2 Communications and synthesis of information

Many BIAs have been sharing more frequent updates with members than they used to (e.g. Downtown Kingston!, Downtown Prince George, Downtown Saskatoon, Downtown St. John's, Downtown Victoria, Downtown Yonge, Mainstreet Bowness, Regina Downtown, Shipyards District, Toronto Entertainment District). BIAs are distilling information from multiple sources on changes to lockdown protocols, implementation of new rules, traffic closures, and more. This was perceived by interviewees as a valued service by members. BIAs have also been holding webinars with experts, offering support, and sharing online tools to help members navigate government supports and shift to

¹¹ Griffin, T., Liu, S., Lu, N., & Bird, A. (2020). Toronto BIAs' Response to COVID-19 www.ryerson.ca/htmresearch/research/current-research/bia-s-and-tourism-development/

online commerce (for example Digital Main Street¹² and services offered by the CFIB¹³ were often mentioned).

4.3 Grants and subsidies

BIAs have been providing subsidies and facilitating members' applications to external grants, for example for personal protective equipment (PPE) and signage (e.g. Mainstreet Bowness, Downtown Halifax, Downtown Prince George, Downtown Saskatoon, Uptown Saint John, West End BIZ). Many also arranged for extra cleaning to give confidence to members and the public (e.g. Belleville Downtown, Downtown Saskatoon, Downtown Victoria, Regina Downtown).

4.4 Consumer focussed events and promotions

BIAs cancelled most events, often creating smaller activations. Extended patios were mentioned, for example, Stratford City Centre spent considerable investment purchasing infrastructure and tables from a local supplier to create an outdoor dining area called 'Al Fresco' where visitors could patronise local restaurants at distance in the outdoors¹⁴. Many BIAs were already questioning the role that large events and festivals play in improving their area, and the pandemic has expedited this strategic decision for many. The return on investment for events, especially larger hallmark festivals that require much planning, resources, dealing with sponsorship, permits, and bureaucracy, is difficult to quantify (e.g. Downtown Orangeville, Inglewood, Quinpool Road, Spring Garden, West End BIZ). Some BIA members often claim large events negatively impact sales, and challenge the use of levy payments and use of BIA resources. Many BIAs mentioned examples of promotions and distribution channels to connect businesses with local residents and visitors (e.g. Downtown Williams Lake, Downtown Yonge, Toronto Entertainment District, Uptown Saint John).

¹² Digital Main Street. digitalmainstreet.ca/

¹³ CFIB. www.cfib-fcei.ca/en/small-business-resources-dealing-covid-19

¹⁴ Stratford City Centre BIA (2020). I See Gold.

www.facebook.com/stratfordcitycentre/videos/3177918148924286/?_tn=%2CO-R

5. BIAs and the Visitor Economy

BIAs directly and indirectly influence and engage the visitor economy. For example, production and facilitation of events and festivals, offering tours, beautification, and marketing to visitor groups have been identified in this study and previous research¹⁵.

Understanding the products and experiences that attract and serve different visitor groups is important. This includes the primary products, such as distinctive businesses like a music store (e.g. Inglewood¹⁶), sports events (e.g. Regina Downtown), convention venues (e.g. Downtown London, Downtown Saskatoon, Toronto Entertainment District), a university research program (e.g. Downtown Saskatoon¹⁷), or a craft collective (e.g. North Edge¹⁸). Further, visitors interact with supporting and secondary services including transport and parking, other animations happening at the same time, accommodations, restaurants, stores, availability of washrooms and rest areas, the quality of the built and natural environment, and even the residents themselves as producers and consumers of culture, service providers, and as hosts. A positive (or negative) experience of any specific component can affect a visitor's perception and evaluation of the whole destination experience, and therefore the likelihood of them returning and sharing positive word-of-mouth recommendations and reviews. An overarching attempt to shape and direct the visitor economy can help increase consistency between the visitor's expectations and the experience that is delivered, which in turn leads to satisfaction.

The extent to which BIAs reported actively engaging the visitor economy was varied. Many had considered the impacts and opportunities. Through their own investment into the public realm, BIAs contribute to the overall visitor product and experience. Often the specific product or experience that attracts visitors is beyond the direct responsibility of

¹⁵Griffin, T. (2020). An Exploration into Toronto's BIAs' Engagement of the Visitor Economy. www.ryerson.ca/htmresearch/research/current-research/bia-s-and-tourism-development/

¹⁶ Recordland Limited goo.gl/maps/zkmep9Y1rzc7f8QX7

¹⁷ Canadian Light Source. www.lightsource.ca/about_the_cls.html

¹⁸ We Are Wild Heart. www.wearewildheart.com

the BIA itself, but partnerships with members and other local groups and institutions can identify and develop distinction, and offer a more positive experience for visitors. BIAs can drive messaging and collaboration on service consistency, packaging and promotion of compatible products, and enhance public space and culture that help create memorable experiences.

Some BIAs were clear that the visitor economy had not been nor would be a major priority. A lack of capacity and resources, dealing with other pressing priorities, and a belief by some that engaging visitors was not an efficient strategy, were all mentioned. Further, some BIAs suggested that the visitor economy was beyond their purview, and was the responsibility of Destination Marketing and Management Organizations (DMMOs).

5.1 Residents' role in the visitor economy

Local residents are the primary customer base and contributors to any Main Street, and are the main focus of BIAs. Developing an active and engaged residential base is vital for Main Street sustainability as a customer base for local businesses, but also for developing cultural activity and identity that fosters distinctiveness, that creates a draw for visitors. Some interviewees described the initial challenge of developing an appreciation among residents themselves of the special and distinct attributes of the community before attempting to attract visitors. The dilemmas and potential tensions of attracting visitors during a pandemic were acknowledged by some, reinforcing the need for a strong relationship with residents and clear messaging around the benefits of managed visitation (e.g. Downtown Canmore, Downtown Williams Lake, Downtown Kingston!, Regina Downtown, Toronto Entertainment District).

5.2 Target Visitor Segments

Understanding what the community has to offer actual and potential visitors is vital, but was not identified by many BIAs. A vital principle in planning for the visitor economy is that *more* is not always *best*. Finding the right visitors, who have the means and capacity to

visit, and are inspired to experience what the community has to offer are most likely to be satisfied and therefore to return and share positive experiences within their own personal networks. Attracting too many visitors at one time, for reasons that are not consistent with community interests, without managing their behaviour and impacts, can lead to residents and visitors alike being disappointed and irritated with the experience, damaging the reputation of the community as a place to live and visit.

5.3 Visitor Groups

The following section identifies and explains a few common visitor groups raised during conversations with interviewees.

5.3.1 Tourists

Tourists are a subset of 'visitors', and technically defined as those travelling for trips out of their usual environment for pleasure, visiting friends and relatives, business (but not for paid work in the destination), and other personal reasons, for less than one-year¹⁹. Traditional ways of categorizing tourists include origin (e.g. intra/inter-Provincial, International), trip duration (e.g. day-trip or overnight), and trip purpose (e.g. vacation/pleasure, visiting friends or relatives, business etc.). Within these groups are many subcategories that can be identified based on the needs of a destination. For many interviewees the bulk of their tourists come from regional drive areas, for short overnight trips or day trips (e.g. Downtown Canmore, Downtown London, Kensington BRZ, Old Strathcona, Shipyards District). Some suggested that regional visitors buoyed their visitor numbers over the summer of 2020 because of restrictions in travel options elsewhere.

5.3.2 Visiting Friends and Relatives (VFR) Visitors

Residents attract visitors who might otherwise not choose that destination, and affect their behaviour and overall experience. This type of travel is commonly referred to as visiting friends and relatives (VFR), and was mentioned by some BIAs as an important

¹⁹ Destination Canada. (2020). Glossary. www.destinationcanada.com/en/glossary

driver of the visitor economy (e.g. Belleville Downtown, Downtown Red Deer, Downtown St. John's, Sydney Downtown Development Association).

VFR is a potential visitor economy strategy that is consistent with developing local culture and residential engagement of the Main Street. Communicating with residents as hosts is a potential strategy for many BIAs. Residents are relatively easy to find and communicate with compared to potential visitors from different places with limited attachment to the community; all VFR visitors have a personal connection to the community that has a significant influence over behaviour and perception²⁰. The implications of a VFR campaign could see increased attendance to events and Main Street businesses who welcome hosts and their guests, and reconnect residents with the BIA community on an ongoing basis. For a more detailed look at this market please see the section on VFR in the report on Toronto BIAs and tourism linked in the footnotes²¹.

5.3.3 Return visitors

Return visitors are important, as they have an established relationship with the destination, have informed and realistic expectations meaning satisfaction is more likely, and can be strong ambassadors for the area. These visitors may return for an annual festival, to visit a specific store, for business, or to spend time with a local friend or relative. BIAs could foster an ongoing connection with some groups to remind them to re-visit, to promote new events and updates to the local area, and to encourage them to share their experiences of the community among their own networks. In addition, tourists who return to the larger destination within which a BIA is situated could become first-time visitors for that Main Street. For example, first time visitors to a city may check off iconic attractions, but may seek alternate and off the beaten path experiences on return trips that many BIA neighbourhoods could provide.

²⁰ Griffin, T. (2015). The missed opportunities of VFR.

www.researchgate.net/publication/275154286_The_missed_opportunity_of_visiting_friends_and_relatives_travel

²¹ Griffin, T., Liu, S., Lu, N., & Bird, A. (2020). Toronto BIAs' Response to COVID-19

www.ryerson.ca/htmresearch/research/current-research/bia-s-and-tourism-development/

5.3.4 Day-trippers

Local people who travel short distances for day trips are a substantial market for BIAs. During the summer of 2020 many interviewees noted an increase in local and regional visitation (e.g. Belleville Downtown, The Waterfront). People visiting other parts of their own city or region may not technically be 'tourists', but can behave like tourists. A challenge with any visitor group is that the services they seek may differ, making some businesses busier than others even if overall volume remains consistent.

The impact of COVID-19 led some interviewees to contemplate the future of day-trippers, especially in the near term, as people's motivations, level of comfort with longer haul travel, and shift to last minute planning²², may take some time to return to pre-pandemic levels (e.g. Chris Rickett). Engaging these groups, giving them specific reasons to visit at specific times, is important. When an experience is perceived to be always available, the urgency to visit declines, providing a convincing reason to visit in the near future that will help drive demand.

5.3.5 Students and Commuters as 'visitors'

Looking at all people who travel into the community with a visitor economy lens helps identify potential implications for encouraging activity. For example, university and college students were identified by BIAs as a visitor group (e.g. Downtown Kingston!, Spring Garden), and their spending and behaviour affect local economic and cultural development, and they also attract friends and family to visit the area. Commuters who work in the area can also be considered through a visitor economy lens. Finding ways to encourage them to spend additional time after work or on weekends for dinner or events and more, and engaging them to share their experiences of the community within their own network and inspire others to visit the area could be a useful strategy.

²² TIAC (Feb, 2021). The state of tourism in Canada during COVID-19. https://tiac-aitc.ca/COVID-19_Reports.html

5.4 Partnering with Destination Marketing and Management Organizations

Destination Marketing and Management Organizations (DMMOs) are responsible for promoting and managing tourism in their communities. There is clearly no single approach to partnerships between BIAs and DMMOs, however, some trends and opportunities were raised through interviews.

Some interviewees described how they take advantage of their DMMO memberships, for example, working on familiarization tours with travel operators, or media trips with influencers with niche interests (e.g. fashion, culinary, sports etc.) (e.g. Exchange District, Kensington BRZ, Shipyards District). As DMMO members, some BIAs take advantage of joint marketing opportunities (e.g. Stratford City Centre), and offer or facilitate grants and subsidies for promotions to tourism markets (e.g. Downtown Prince George, Inglewood²³, Kensington, Red Deer, West End BIZ). Informal relationships also lead to cross-promotion and re-sharing of social media posts between the BIA and DMMO (e.g. Downtown Halifax, Downtown Prince George, Inglewood²⁴, Mainstreet Bowness, Stratford, Uptown Saint John).

A few BIAs explained how they make sure they are familiar with the messaging and branding DMMOs use for their areas, and where possible align their own communications to leverage existing efforts and reinforce messaging (e.g. Shipyards District). A number of BIAs described a refreshed relationship with their local DMMOs since the pandemic. As DMMOs' traditional markets have been restricted, many shifted to targeting more local markets, therefore overlapping with BIAs' efforts more closely than normal. BIAs have partnered on marketing efforts with DMMOs more than normal (e.g. Mainstreet Bowness, Downtown Halifax, Downtown Prince George, Stratford City Centre, Uptown Saint John). Many BIAs have formed or joined roundtable type meetings with the local DMMO, along with other BIAs and related groups who share their concerns and ideas for collaboration (e.g. Downtown Saskatoon). For example, Stratford City Centre BIA work

²³ Travel Alberta. Corporate Investment Program industry.travelalberta.com/programs-tools/coop-investment

²⁴ E.g. Tourism Calgary Love YYC www.visitcalgary.com/loveyyyc

with the DMMO Destination Stratford on a municipal destination development task force. This committee ranks submissions received for destination development and animation projects, and when the most feasible projects have been selected the BIA and DMMO, with other stakeholders, divide tasks and work together to execute the projects²⁵. Many BIAs noted that they would like to continue collaborating with DMMOs in innovative and flexible ways beyond COVID-19.

Although there is overlap in the goals of BIAs and DMMOs, there are also clear separations. A number BIAs suggested their responsibility was to engage residents and adjacent communities, and attracting visitors from further afield is the DMMO's responsibility (e.g. Downtown Halifax, Downtown Victoria). Some DMMOs are funded in some form by the hotel community, which directs their focus to visitor types that may not be priorities for BIAs. Some interviewees revealed limited engagement with their DMMOs, with the main reasons being limited capacities to take advantage of a partnership, high cost of DMMO membership and joint marketing opportunities, personality differences with leadership, and distinct areas of focus by the DMMO that are inconsistent with the product and experiences on offer in the BIA's area.

5.5 Partnerships with other BIAs

Partnerships with other BIAs were mentioned by some interviewees. BIAs who share proximity and complimentary experiences can benefit from sharing ideas, insights, data, and potentially more formal collaborations in advocacy (e.g. West End BIZ), product development and streetscaping (e.g. Downtown Vancouver, Exchange District²⁶), shared administrative services (e.g. Downtown Halifax, Spring Garden), and promotion of each others' efforts on social media (e.g. Mainstreet Bowness, Kensington BRZ). Many are part of regular calls with other BIAs and related organizations, especially since COVID-19, to keep each other up to date and share ideas and best practices. These were sometimes

²⁵ Stratford City Centre. COVID-19 Projects. www.stratfordcitycentre.ca/covid-19

²⁶ The Exchange District BIZ. Central Winnipeg Bike loop. exchangedistrict.org/2020/08/31/central-winnipeg-bike-loop/

arranged by regional or provincial associations, as well as more informal relationship-based networks of like-minded BIAs (e.g. Belleville Downtown, Downtown Vancouver, Inglewood, Downtown Red Deer, Mainstreet Bowness, Quinpool Road, Spring Garden). A challenge associated with collaborating with other BIAs is differences in capacities. If surrounded by small, volunteer led BIAs, it can be difficult to coordinate and motivate efforts to partner, potentially leading to unbalanced direction and workloads.

From a visitor's viewpoint, a 'destination' is rarely conceived by organizational or municipal boundaries. A visitor to a city may not distinguish their evaluation of one BIA district from another, and an enjoyable experience is more likely to lead to return visits and positive word-of-mouth about the overall destination. Although other Main Streets can be viewed as competitors, they can also be partners in raising the quality of the overall area, increasing awareness of the wider destination and quality of experiences on offer. If a visitor has a positive experience in a neighbouring BIA it can impact the reputation and return visitation of the wider destination.

5.6 Data Collection: Challenges & Opportunities

A key theme concerns data that can be used to identify and measure trends and opportunities. Understanding and communicating the impact of any event, from a festival to a pandemic, is strengthened by measurement. Knowing who is impacted, in what ways, and to what extent, can inform strategic planning, internal and external communications, explaining the return of investment for BIA efforts and initiatives, funding decisions, and advocacy work. Unfortunately, the lack of available data at a BIA level, and the cost of collection and analysis are a challenge. An understandable and common reason for the lack of data collection and analysis by BIAs is a lack of capacity and financial resources.

Ongoing data collection, conducted in a consistent and methodical manner, may not provide immediate returns, but can provide substantial pay off at a later date. This may include using pedestrian counters to estimate foot traffic, tracking openings and closings, or conducting membership surveys (e.g. Shipyards District, West End BIZ). Collecting regular survey data, whether intercepting people in the street, or using online methods to

distribute a questionnaire, to find out where they are from, why they visit the area, and their evaluation of their experiences, can provide useful information (e.g. Shipyards District, West End BIZ). It is very important to be aware of the limitations of different sampling approaches. Surveying people through social media, for example, cannot provide a representative sample of users of the Main Street area, and must be presented and interpreted with caution.

Many DMMOs conduct regular surveys using panel data to measure awareness and intent towards a particular place or type of experience (e.g. day trip for a festival etc.). BIAs might consider using this approach to develop a benchmark and identify potential trends and opportunities. Cost-sharing with other partners is also worth considering, including with DMMOs, local governments, and neighbouring BIAs. There are many companies who can assist with data collection, from those offering full service packages including survey design, data collection, presentation and interpretation of results²⁷, to those who provide access to panel data, but limited support for survey design and analysis²⁸.

Data services can help BIAs understand different markets²⁹. Some tools can also be found on DMMO websites, for example, Destination Canada have target segments, based upon Environics Analytics Prizm data (as used by Downtown Vancouver). There are many reports and materials that profile different segments in terms of behaviour, attitudes, media consumption, and more³⁰, along with toolkits on imagery and branding, that could help inform some BIA decisions and strategies. Destination Canada's EQ tools include a survey for visitors and for businesses to identify which segments are visiting, what their interests are, as well as what types of visitor segments businesses in a community are best suited to serve.

²⁷ See the Market Research association and list of members [MRIA-ARIM - Home](#)

²⁸ Some examples include: [How Google Surveys works](#) or [Amazon Mechanical Turk](#) or [SurveyMonkey Audience | Market Research Panel](#) among many others.

²⁹ prizm.environicsanalytics.com/

³⁰ Destination Canada. EQ Tools. www.destinationcanada.com/en/tools

Downtown Vancouver BIA releases various reports that summarise and interpret primary and secondary data that is paid for, or shared through relationships with other companies and organizations, or freely available through open access. For example, the BIA released a report on the impact of COVID-19³¹, and their annual State of Downtown report³² that summarises many data points including: population numbers and demographics, workforce statistics, student numbers, foot traffic, attendance of various events and attractions, convention activity, retail and office vacancy rates, hotel occupancy, air and cruise arrivals, transit use, new residential and other builds, consumer price index, and more. This data is collected from Statistics Canada, local government agencies, pedestrian counters and some private research and consultancy firms. Some of the data is compared against other areas of the city to show context. The BIA also collects data directly, for example the BIA clean team are tasked with tracking and reporting various incidents including acts of vandalism and discarded needles. In addition, staff routinely walk the streets and manually track business closures and openings that are kept in a database for trend analysis³³.

³¹ Downtown Vancouver BIA. 2020 Year-End Downtown Economic Snapshot. www.dtvancouver.ca/covid-19-snapshot/

³² Downtown Vancouver BIA. State of Downtown 2019. www.dtvancouver.ca/state-of-downtown-2019/

³³ Downtown Vancouver BIA. Research. www.dtvancouver.ca/what-we-do/research/

6. BIAs and the Visitor Economy: Looking Forward

Five main themes were raised when considering the role of the visitor economy for BIAs:

1. **Engagement of residents** to develop and evolve the cultural identity and distinctiveness of a community can feed into a visitor economy strategy, making the community a more vibrant place to live and offering visitor experiences consistent with community interests.
2. Building upon and **maintaining relationships with (often more local) visitors** who have spent time in the community since the pandemic, and give them reason to re-visit and share their experiences.
3. Identification of **the enduring changes created by the pandemic, and what they mean for visitation**. For example, migration to lower density areas³⁴, renewed interest in local experiences, and the unfortunate turnover of businesses, may create new demand from different visitor groups. Other trends include the increasing number of those who can 'work from anywhere', interest in non-crowded areas, and engagement of groups who might usually travel elsewhere (e.g. young backpackers and snowbirds)³⁵.
4. Establishing and **furthering partnerships with Destination Marketing and Management Organizations (DMMOs) and other BIAs** to help propel visitor product development and consistent communications for the broader destination.
5. **Collection and analysis of data** to identify, communicate, and measure trends and challenges, and the value of BIA initiatives. A review of existing and available data, identification of indicators that can be measured on an ongoing and consistent basis, and collection of new data from visitors, residents, and businesses perhaps in partnerships could help strengthen strategic planning relating to the visitor economy.

³⁴ Clayton, F. & Bailey, D. (Feb, 2021). Bleeding of Resident Population from City of Toronto and Region Accelerated Again in 2020. www.ryerson.ca/cur/Blog/blogentry54/

³⁵ TIAC (Feb, 2021). The state of tourism in Canada during COVID-19. https://tiac-aitc.ca/COVID-19_Reports.html

7. Conclusion

The effects of the pandemic have been substantial for a wide range of BIAs who have experienced different impacts depending on their location and character. Since March, Main Street stakeholders have worked hard to create innovative and flexible ways to respond to the demands of pandemic realities. BIAs have mobilised their resources to provide information, support and guidance to their business communities often resulting in increased member engagement.

As stakeholders begin to look cautiously at life post-pandemic, the visitor economy may be a valuable tool in supporting recovery for BIAs and the communities they represent. Main Streets are destinations for a wide variety of visitors, whether they are known or not to the BIA. Leveraging business area strengths and visitor behaviours could be useful in restoring vibrancy and animation to Canada's Main Streets. Understanding the tourism product and identifying specific visitor segments is key in supporting the underlying visitor strategy which can also support broader goals of community development and engagement.

The authors welcome feedback on this report and are happy to answer any questions. Please contact Dr. Tom Griffin at tom.griffin@ryerson.ca if you wish to further discuss ideas related to the topics covered in this report.

8. Partnerships with the Institute for Hospitality & Tourism Research

There are several potential ways for BIAs to partner with the Research Institute and the Ted Rogers School of Hospitality and Tourism Management at Ryerson University. If you would like to discuss them, please connect with Tom Griffin to discuss (tom.griffin@ryerson.ca).

- The Institute for Hospitality and Tourism Research³⁶ aims to conduct research that is relevant to the industry. There are opportunities to partner on grant applications to fund research projects. Please contact Tom if you would like to learn more.
- Our school runs a co-op program, where students work for four or eight months at a placement. Some details are available on the website³⁷ or contact Tom to discuss ideas and ask questions.
- We have many students who are keen to find part-time and summer employment. If you have positions you want to share, we would be happy to distribute them directly to our students and through our Business Career Hub³⁸.
- We teach classes on marketing, market research, service design, and more³⁹. We are always looking for class project ideas and guest speakers. Please contact Dr. Tom Griffin if you'd like to discuss this further.

³⁶ www.ryerson.ca/htmresearch/

³⁷ www.ryerson.ca/trsm-co-op/

³⁸ www.ryerson.ca/trsm-careers/

³⁹ www.ryerson.ca/tedrogersschool/hospitality-tourism-management/programs-and-admissions/curriculum-overview/

Appendix: Interviewees. The Research team are grateful for the time and help provided.

Name	Role	Organization	Type of Org.	Province
Annie MacInnis	Co-Chair	AB BIA Alliance	BIA Association	AB
	Chair	CBiZ, Calgary Federation of BIAs	BIA Association	AB
	Executive Director	Kensington BRZ	BRZ	AB
Ron Palmer	Vice Chair	Bloor Yorkville BIA	BIA	ON
	Principal and Planner	The Planning Partnership	Service Provider	ON
Trina MacDonald	General Manager	Business Fredericton North	BIA	NB
	President	Downtown New Brunswick	BIA Association	NB
Chris Rickett	Economic Development and Culture	City of Toronto	Government	ON
Darryl Julott	Managing Lead	Digital Main Street	Service Provider	ON
Jared Kolb	Program Manager	Digital Main Street	Service Provider	ON
Beth Vandervoort	Executive Director	Downtown Canmore	BIA	AB
Paul Mackinnon	Executive Director	Downtown Halifax Business Commission	BIA	NS
	President	Downtowns Atlantic Canada	BIA Association	Maritime
Mark Burley	Executive Director	Downtown Kelowna Association	BIA	BC
Erin Allen	Board Member	Downtown Kingston!	BIA	ON
Michele Langlois	Interim Executive Director	Downtown Kingston!	BIA	ON
Lisa Thomas	Placemaking and Activations Coordinator	Downtown London	BIA	ON
Alison Scheel	General Manager	Downtown Orangeville	BIA	ON
Colleen Van Mook	Executive Director	Downtown Prince George	BIA	BC
Amanda Gould	Executive Director	Downtown Red Deer Business Association	BIA	AB
Brent Penner	Executive Director	Downtown Saskatoon	BIA	SK
Scott Cluney	Executive Director	Downtown St. John's	BIA	NL
James Anderson	Research and Data Analyst	Downtown Vancouver	BIA	BC
Gavin Duffus	Economic Development Manager	Downtown Vancouver	BIA	BC
Jeff Bray	Executive Director	Downtown Victoria Business Association	BIA	BC
Pauline Larsen	Director Econ. and Community Development	Downtown Yonge	BIA	ON
Susie Barbosa	Econ. and Community Development Coordinator	Downtown Yonge	BIA	ON

Name	Role	Organization	Type of Org.	Province
Rebecca O'Brien	Executive Director	Inglewood	BIA	AB
Jacqui Esler	Executive Director	Mainstreet Bowness	BIA	AB
Laurene Viarobo	Executive Director	North Edge Business Association	BIA	AB
Kay Matthews	Executive Director	OBIAA	BIA Association	ON
Cherie Klassen	Executive Director	Old Strathcona Business Association	BIA	AB
Karla Nicholson	Executive Director	Quinpool Road Mainstreet District Association	BIA	NS
Judith Veresuk	Executive Director	Regina Downtown	BID	SK
Sue Uteck	Executive Director	Spring Garden Area Business Association	BIA	NS
Rebecca Scott	Executive Director	Stratford City Centre	BIA	ON
Michelle Wilson	Executive Director	Sydney Downtown Development Association	BIA	NS
John Kiru	Executive Director	TABIA	BIA Association	ON
Marijo Cuerrier	Executive Director	The Belleville Downtown District	BIA	ON
Kelsey Moniz	Media and Marketing Officer	The Belleville Downtown District	BIA	ON
David Pensato	Executive Director	The Exchange District	BIZ	MB
Greg Holmes	Executive Director	The Shipyards District / Lower Lonsdale	BIA	BC
Oliver Hierlihy	Director of Operations	The Waterfront	BIA	ON
Darcel Milani	Communications Director	Toronto Entertainment District	BIA	ON
Janice Solomon	Executive Director	Toronto Entertainment District	BIA	ON
Brad Bradford	Toronto City Councillor	Toronto Municipal Government	Government	ON
Nancy Tissington	Executive Director	Uptown Saint John	BIA	NB
Joseph Kornelsen	Executive Director	West End BIZ	BIZ	MB