

Impact Survey & Analysis

September 12, 2014

# Food Truck Impact Survey

Survey of Downtown Businesses



Prepared for The City of Calgary  
by PRA Inc.



Contact:

Nicholas Borodenko  
Senior Research Manager  
PRA Inc.  
1-888-877-6744  
email: borodenko@pra.ca  
500 – 363 Broadway  
Winnipeg, MB R3C 3N9

calgary.ca | contact 311



THE CITY OF  
**CALGARY**  
CORPORATE SERVICES

**Onward/**to come from communicator

# Methodology

## Table of Contents

EXECUTIVE SUMMARY .....	i
INTRODUCTION .....	1
METHODOLOGY .....	2
BUSINESS SEGMENTS .....	4
Restaurants versus other businesses .....	4
Proximity to food trucks.....	4
Statistical significance .....	5
IMPACT ON THE AREA.....	6
IMPACT ON EMPLOYEES .....	13
Overall impact of food trucks on employees .....	13
<i>Identified impacts on employees.....</i>	14
Other impacts on employees .....	15
<i>More options of where to eat .....</i>	15
<i>Increase likelihood of going out to eat .....</i>	16
<i>Food trucks encourage staff to socialize.....</i>	17
<i>Convenience of getting food.....</i>	18
<i>Impact on restaurants .....</i>	19
IMPACT ON CUSTOMERS OR CLIENTS .....	20
Overall impact of food trucks on customers or clients .....	20
<i>Identified impacts on customers and clients .....</i>	21
Other impacts on customers or clients .....	22
<i>More options of where to eat .....</i>	22
<i>Food truck crowds make it difficult for clients to get to us .....</i>	23
<i>Food trucks' impact on client parking .....</i>	24
<i>Food trucks' impact on business use .....</i>	25
FINANCIAL IMPACT ON BUSINESSES .....	26
Overall financial impact of food trucks on businesses .....	26
<i>Identified financial impacts .....</i>	27
Impact on revenue .....	28



# Methodology

Other financial impacts .....	30
<i>Compete for customers</i> .....	30
<i>Discourage customers</i> .....	31
<i>Pedestrian traffic good for business</i> .....	32
<i>Increase business traffic</i> .....	33
CONCERNS ABOUT FOOD TRUCKS .....	34
Concerns over food trucks, by business proximity .....	35
Concerns over food trucks, by business type .....	36
OVERALL ASSESSMENT OF FOOD TRUCKS .....	37
Ideal number of food trucks downtown .....	37
Recommendations .....	38
KEY FINDINGS .....	39
Appendix A Letter and Questionnaire .....	41

# Methodology

## EXECUTIVE SUMMARY

The City of Calgary's Animal & Bylaw Services (ABS) team hired PRA to conduct a survey of owners and operators of any commercial business located downtown to assess the impacts Full Service Food Vehicles (FSFV or food trucks) have on businesses located in downtown Calgary.

### Methodology

PRA used two methods to distribute the survey to downtown businesses.

- **In-person distribution.** From August 19 to 21, 2014, PRA distributed surveys to businesses in downtown Calgary. In total, 597 businesses were approached to complete the survey (either by mailing back a paper copy of the survey or completing the survey online by entering a unique code printed on their survey package), of which 195 completed the survey (128 by mail, 37 online, and 30 by phone).
- **Additional restaurant sample.** In order to ensure an adequate sample of restaurants was reached, PRA identified 74 downtown restaurants that had not been approached with a survey in person. PRA contacted these restaurants by telephone to complete the survey. Of the 74 restaurants, eight completed the survey by telephone.

Overall, this yielded 203 completed surveys.

### Impact of food trucks on downtown

Businesses were asked several questions about food trucks' impacts on downtown Calgary; positive views of food trucks include the following:

- Over 9 in 10 businesses disagree or strongly disagree that *food trucks make the area less inviting* (33% strongly disagree).
- Over 8 in 10 businesses agree or strongly agree that *food trucks encourage people to get out on the street during lunch hour* (40% strongly agree).
- Over 8 in 10 businesses agree or strongly agree that *food trucks add to the vibrancy of downtown* (38% strongly agree).
- About 7 in 10 disagree or strongly disagree that *food trucks increase the congestion on the sidewalks, making it more difficult to walk around the downtown* (19% strongly disagree).
- Over 6 in 10 businesses disagree or strongly disagree that *food trucks are unfair competition for restaurants in their area* (23% strongly disagree).
- Just under 5 in 10 agree or strongly agree that *food trucks encourage people to come downtown* (23% strongly agree).

Where businesses were most negative is about food trucks' impact on parking. Almost 3 in 10 businesses say that food trucks make it more or much more difficult to find parking downtown, although the majority (53%) say food trucks have no impact on the ability to find parking.



# Methodology

## Impact on employees

Overall, the majority of businesses say that food trucks have no impact (48%) on their employees, although three times as many say food trucks have a positive (35%) as negative (12%) impact. When assessing impacts on employees, businesses rate the following positively:

- Almost 9 in 10 businesses agree or strongly agree that *food trucks provide employees with more options of where to eat* (39% strongly agree).
- Almost 8 in 10 businesses agree or strongly agree that *food trucks make getting food more convenient* (22% strongly agree).
- About 7 in 10 businesses agree or strongly agree that *employees are more likely to go out to eat when there are food trucks nearby* (23% who strongly agree).
- Almost 6 in 10 businesses agree or strongly agree that *food trucks encourage staff to socialize* (18% who strongly agree).

Although many businesses say that food trucks encourage staff to eat out more, for many it does not appear to be a substitute for eating at restaurants. Specifically, about 1 in 3 businesses agree or strongly agree that *staff are less likely to eat at restaurants when food trucks are nearby* (6% strongly agree); however, almost half are in disagreement (about 4% strongly disagree), indicating that their food truck use does not cause them to frequent restaurants less often.

## Impact on customers or clients

Overall, the majority of businesses say that food trucks have no impact (53%) on their customers or clients, while about twice as many say food trucks have a positive (21%) versus a negative (10%) impact. When assessing impacts on customers or clients, businesses rate the following positively:

- Over 7 in 10 businesses disagree or strongly disagree that *food trucks make their customers/clients less likely to visit/use their business* (28% who strongly disagree).
- Over 7 in 10 businesses disagree or strongly disagree that *food trucks are disruptive, creating crowds that make it more difficult for their clients to get to them* (27% strongly disagree).
- Among all businesses, more than 7 in 10 are in agreement that *food trucks provide their customers/clients with greater options as to where to eat* (19% strongly agree).

## Financial impact on businesses

Overall, more than 6 in 10 businesses (62%) say that food trucks do not have any financial impact on their businesses, while just as many say food trucks have a positive (16%) as negative (17%) impact. About 13% (almost all restaurants) attribute a decrease in revenue to food trucks, with the majority of these assessing the impact on their revenue at 10% or less.





# Methodology

## Concerns about food trucks

Among five concerns businesses rated, businesses (regardless of proximity to food trucks or the type of business they run) are most concerned with *litter from customers* (over half are at least somewhat concerned) and *food safety* (about half at least somewhat concerned). On the other end, businesses show very little concern for *odours from food trucks* (just over 1 in 10 are at least somewhat concerned) or *noise from food trucks* (about 1 in 10 are at least somewhat concerned).

## Overall assessment of food trucks

Overall, 46% of businesses surveyed would like to see more food trucks downtown, while 35% would like to see the number remain the same. About 16% would prefer to see fewer food trucks.

## Impact by proximity to businesses

Regardless of businesses' proximity to food trucks, businesses hold very similar (positive) views of food trucks. Even for aspects where proximity would likely affect businesses (e.g., noise or odours from food trucks, increased foot traffic or congestion on sidewalks, parking), businesses hold fairly universal views of the impact food trucks have. Thus, it does not appear that being any closer to where food trucks typically operate has any more or less positive or negative impacts on businesses, although more positive than negative impacts are identified by businesses regardless of proximity.

## Impact on restaurants versus other businesses

Because food trucks are direct competitors for brick-and-mortar restaurants, it is not surprising that restaurants report being most negatively-impacted by food trucks' presence downtown. Many believe that food trucks have a negative impact on their business, either by directly taking customers away or by food trucks blocking the frontage of their businesses, thus making it more difficult for people to see them. In fact, 53% of restaurants say that food trucks have had a negative impact on their finances. Although restaurants may be affected financially by food trucks, they generally have a much more negative view of food trucks and their impact than other businesses. For instance, restaurants are much less likely than other businesses to say that food trucks add to the vibrancy of downtown or increase foot traffic downtown.

In spite of restaurants' generally negative views on the impact food trucks have, just 4% recommend that The City should *do away with food trucks altogether*, which indicates that although many perceive food trucks as a direct competitor and potentially having negative impacts on their business, restaurants are more likely to recommend The City put restrictions in place (e.g., designated parking spots) rather than eliminating food trucks altogether.

# Introduction

## INTRODUCTION

In August 2011, the Food Truck Pilot Program was launched in Calgary. A new bylaw category for Full Service Food Vehicle (FSFV or food truck) was enacted October 31, 2013, to regulate food trucks in Calgary. As part of the 2013 bylaw enactment, Council requires Administration to report back to the Standing Policy Committee (SPC) in October 2014 on the monitoring of impacts to local businesses.

“Local businesses” are defined as the specific group impacted by food trucks. Commercial businesses operating anywhere in The City where food trucks operate, but specifically the downtown core, are of greatest interest.

In order to monitor impacts to local businesses, The City’s Animal & Bylaw Services (ABS) team hired PRA to conduct a survey of owners and operators of any commercial business located downtown.

The purpose of the survey was to identify the following:

- positive and negative impacts to parking availability
- positive and negative impacts of increased traffic
- attitudes toward waste handling, vehicle emissions, noise, and odours
- whether the food trucks are competing with or enhancing local business
- whether the food trucks are improving or detracting from local vitality
- any impacts on restaurants

# Methodology

## METHODOLOGY

### Survey design

Working with ABS staff, PRA designed a questionnaire to meet the objectives of the research. The questionnaire went through a few rounds of revisions prior to being finalized. The final questionnaire contained 39 questions, four of which were open-ended.

### Pretest

PRA developed a sample of businesses located downtown using Downtown Calgary's list of businesses. PRA contacted businesses by phone on August 11, 2014, and pretested the survey with four businesses (including one restaurant). The pretest identified some changes to wording and question order to improve survey flow. These changes were approved by ABS.

### Tracking of food truck locations

From July 30, 2014, to August 13, 2014, PRA tracked the location of food trucks in Calgary using two sources: yycfoodtrucks.com and the Street Food Calgary iPhone app. Each day, PRA identified the name and location of each food truck listed on these sources. After the two-week tracking period, PRA identified "hotspots" in downtown Calgary where food trucks were most likely to be located. These hotspots were used to identify areas where surveys would be distributed to businesses, the methodology for which is described in the next section.

### Survey distribution

The survey was conducted using two methods:

- In-person distribution.** From August 19 to 21, 2014, PRA distributed surveys to businesses in downtown Calgary. In total, 597 businesses were approached to complete the survey (either by mailing back a paper copy of the survey or completing the survey online by entering a unique code printed on their survey package), of which 561 agreed to accept the survey. One week after the survey was distributed, PRA followed up by telephone with businesses who had not yet completed their survey by mail or online to encourage them to complete the survey and offer them the opportunity to complete the survey by telephone. In total, 195 businesses completed the survey, yielding a response rate of 32.7%.

**Table 1: Survey response rate**

Total businesses approached	597
Refused survey initially	36
Total surveys distributed	561
Completed surveys	195
- Mail	128
- Online	37
- Phone	30
Response rate [Completed/Approached]	32.7%



# Methodology

- **Additional restaurant sample.** As noted in the Introduction, one of the focuses of the research was to determine impacts specifically on restaurants. One of the goals was that at least 20% of completed surveys would come from restaurants located downtown. In order to ensure an adequate sample of restaurants was reached, PRA identified 74 downtown restaurants that had not been approached with a survey in person. PRA contacted these restaurants by telephone to complete the survey. Of the 74 restaurants, 8 completed the survey by telephone.

**Table 2: Outcomes for restaurant sample**

Total restaurants attempted	74
Completed surveys	8
Refusals	3
Response rate [Completed/Total]	10.8%

Overall, this yielded 203 responses from businesses.

# Business segments

## BUSINESS SEGMENTS

### Restaurants versus other businesses

As mentioned, one of the objectives for this research was to identify the perceptions of restaurants and how they may differ from other businesses in order to identify the impact food trucks may have on what are likely their most direct competitors. The goal was to ensure at least 20% of completed surveys were from restaurants in order to have a large enough sample size to be able to compare against other businesses. For the purposes of this report, responses from restaurants are compared to responses from all other businesses (with the exception of the one business that did not indicate its business type).

<b>Table 3: Business type</b> <i>Which of the following best describes your organization/business at this location?</i>	
	Overall (n = 203)
Professional office	52%
Restaurant	24%
Retail	11%
Consumer services	6%
Energy	4%
Construction	1%
Other	2%
No response	1%
Note: Column may not sum to 100% due to rounding.	

### Proximity to food trucks

In addition to assessing the impact food trucks have on restaurants versus other businesses, PRA, in consultation with ABS, identified the need to assess the impact on businesses based on their proximity to food trucks. This was viewed as important because many of the impacts tested in this research may be based on proximity to food trucks (impact of foot traffic, noise from food trucks, etc.). Therefore, businesses were grouped into three types based on their answer to the question: *Typically, where is the closest food truck located relative to your organization?* These three types were defined as follows:

- **Type 1** – Type 1 businesses are those that are closest to food trucks; either food truck(s) are parked in front of their business, or they are within the block in which their business operates.
- **Type 2** – Type 2 businesses are those where a food truck operates within one block of their business, but not on their block (e.g., business is between 7<sup>th</sup> Street and 8<sup>th</sup> Street, but food truck(s) operate in between 7<sup>th</sup> Street and 6<sup>th</sup> Street).
- **Type 3** – Type 3 businesses are those where food trucks operate two or more blocks away.

The breakdown of these businesses is shown in the table on the next page.

# Business segments

**Table 4: Business proximity to food trucks**

*Typically, where is the closest food truck located relative to your organization?*

	Overall (n = 203)
Type 1	35%
- In front of this building	20%
- On this block, but not directly in front of building	15%
Type 2 (within a block)	25%
Type 3 (Two or more blocks away)	21%
Don't know	10%
No response	9%

## Statistical significance

The standard for designating whether a relationship can be termed *statistically significant* is that a Pearson's chi-square must have a probability of a type 1 error of less than .05 (i.e., less than 5%). This is a standard measure of error used in academic research with reasonable sample sizes. Throughout this document, any difference deemed as statistically significant meets this criterion.

### Identifying statistically-significant differences

*In this report, there are two types of charts. Those charts that show results by the location of business (i.e., Type 1, Type 2, or Type 3) and those that compare responses from restaurants to other businesses. When differences between these groups are statistically significant (i.e., difference in response by location of business or difference in response comparing restaurants to other business), an asterisk (\*) will appear in the title of the chart.*



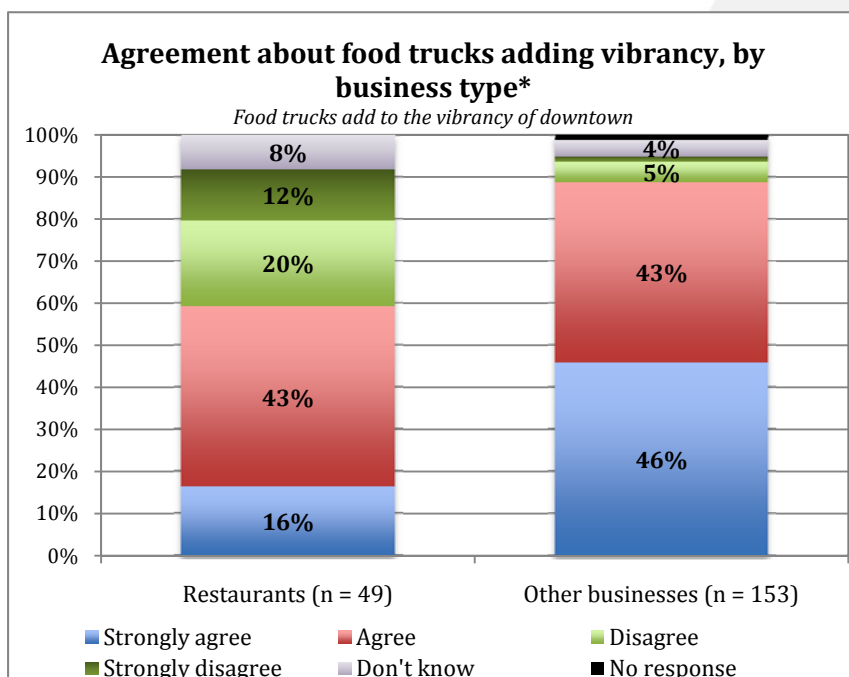
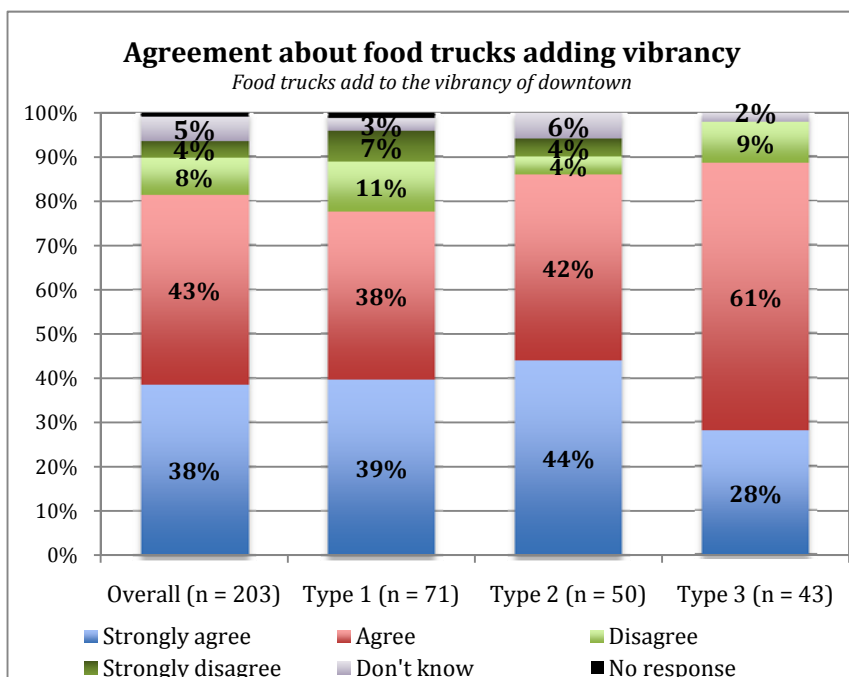
# Impact of food trucks on area

## IMPACT ON THE AREA

### Vibrancy

Overall, more than 8 in 10 businesses agree or strongly agree that *food trucks add to the vibrancy of downtown*, including 38% who strongly agree. Examining results by the location of businesses relative to food trucks shows that this pattern is virtually the same across all types, indicating that even those who are not located near food trucks see them as adding to the vibrancy of downtown.

Results in the figure to the right show that restaurants are statistically less positive about whether *food trucks add to the vibrancy of downtown* than other businesses. While almost 9 in 10 other businesses agree or strongly agree with this statement, about 6 in 10 restaurants agree or strongly agree. In fact, almost three times as many other businesses as restaurants strongly agree that *food trucks add to the vibrancy of downtown* (46% versus 16%). Although restaurants are more negative than other businesses, it should be pointed out that the majority still agree that food trucks add to the vibrancy.



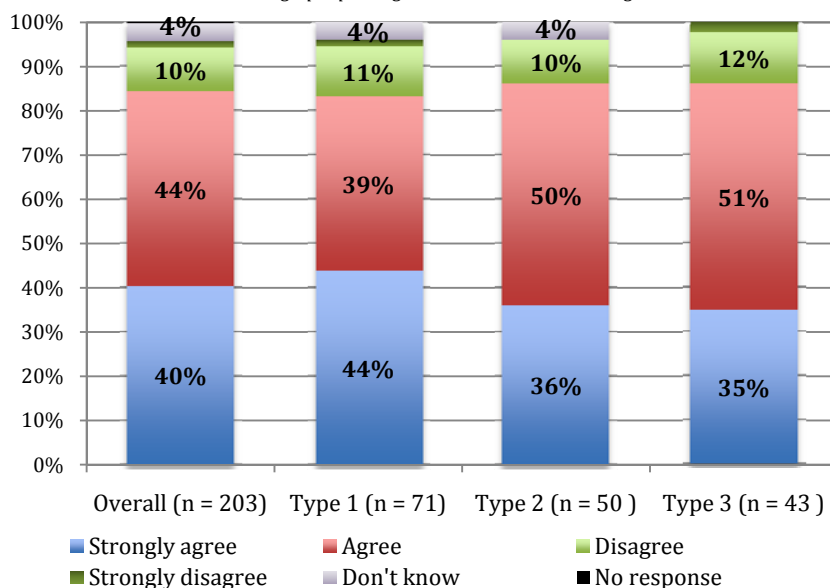
# Impact of food trucks on area

## Getting people outside during lunch

Over 8 in 10 businesses agree or strongly agree that *food trucks encourage people to get out on the street during lunch hour*, including 40% who strongly agree. Another 1 in 10 disagree or strongly disagree. There is virtually no difference by business location, with just over 8 in 10 agreeing in each type.

### Agreement about food trucks getting people out during lunch

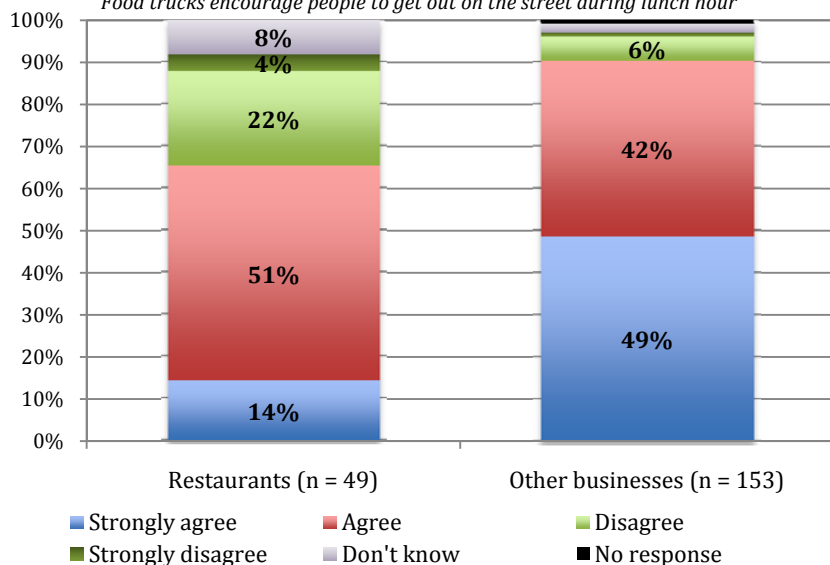
*Food trucks encourage people to get out on the street during lunch hour*



Restaurants are statistically less likely than other businesses to agree that *food trucks encourage people to get out on the street during lunch hour*. More than 9 in 10 other businesses agree with this statement compared to just over 6 in 10 restaurants (there is also a 3:1 difference in the proportion that strongly agrees).

### Agreement about food trucks getting people out during lunch, by business type\*

*Food trucks encourage people to get out on the street during lunch hour*



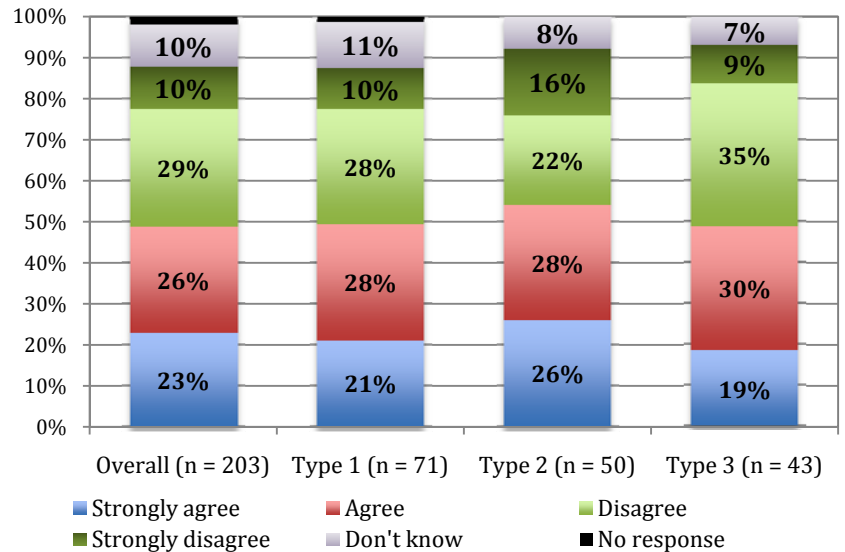
# Impact of food trucks on area

## Encourage people to come downtown

Almost half of businesses agree or strongly agree that *food trucks encourage people to come downtown*, including 23% who strongly agree. Another 4 in 10 disagree, with 10% strongly disagreeing. These results are similar regardless of the businesses' proximity to food trucks.

### Agreement about food trucks encouraging people to come downtown

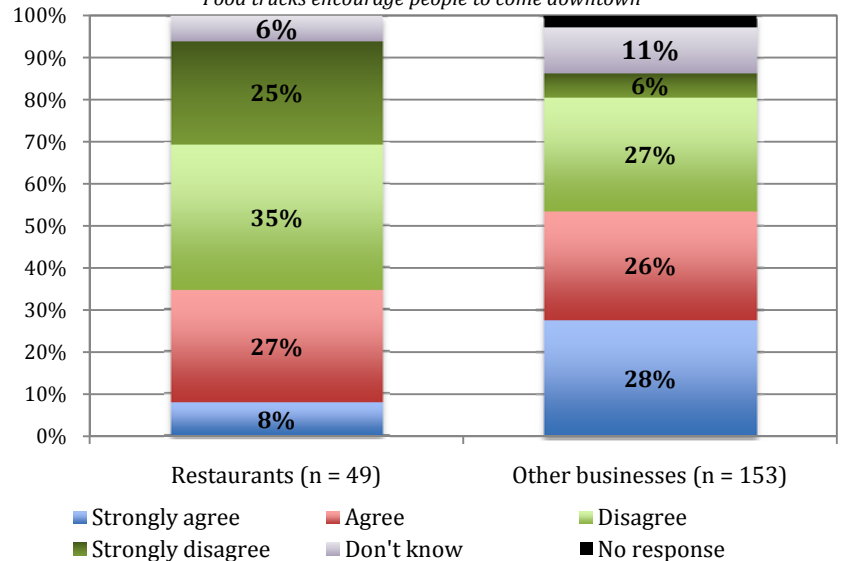
*Food trucks encourage people to come downtown*



Over half of other businesses agree or strongly agree that *food trucks encourage people to come downtown*, which is statistically higher than the one-third of restaurants who agree or strongly agree.

### Agreement about food trucks encouraging people to come downtown, by business type\*

*Food trucks encourage people to come downtown*





# Impact of food trucks on area

## Make area less inviting

Very few businesses (just 1 in 10) agree or strongly agree that *food trucks make the area less inviting*. This includes just 3% who strongly agree with this statement. Conversely, over 8 in 10 disagree or strongly disagree, including 33% who strongly disagree.

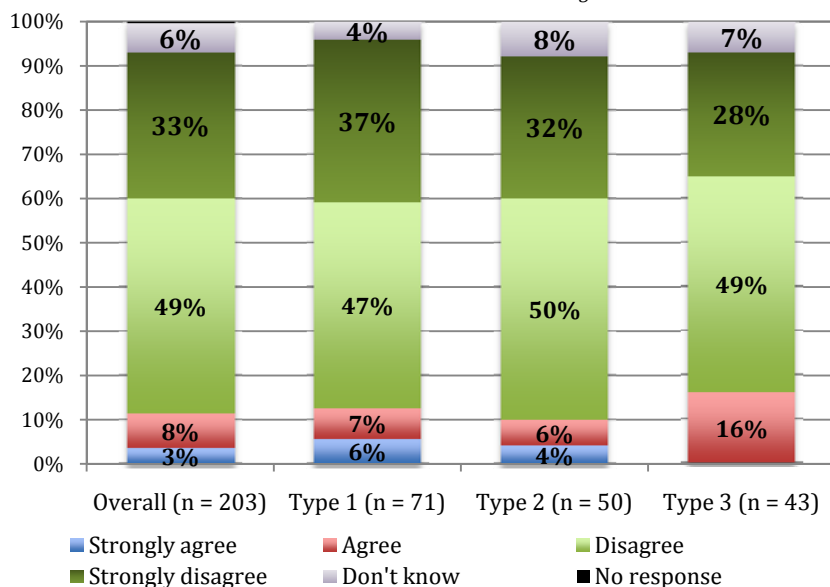
Although not statistically significant, there does appear to be a slight proximity effect, as the proportion of businesses who strongly agree with this statement decreases the further their business is from a food truck. About 6% of Type 1 businesses

strongly agree, indicating that food trucks make the area less inviting, dropping to 4% of Type 2 businesses and none in Type 3.

Restaurants are statistically more likely than other businesses to agree or strongly agree that *food trucks make the area less inviting*. In fact, they are about four times more likely to agree or strongly agree (about one-quarter compared to one-twentieth).

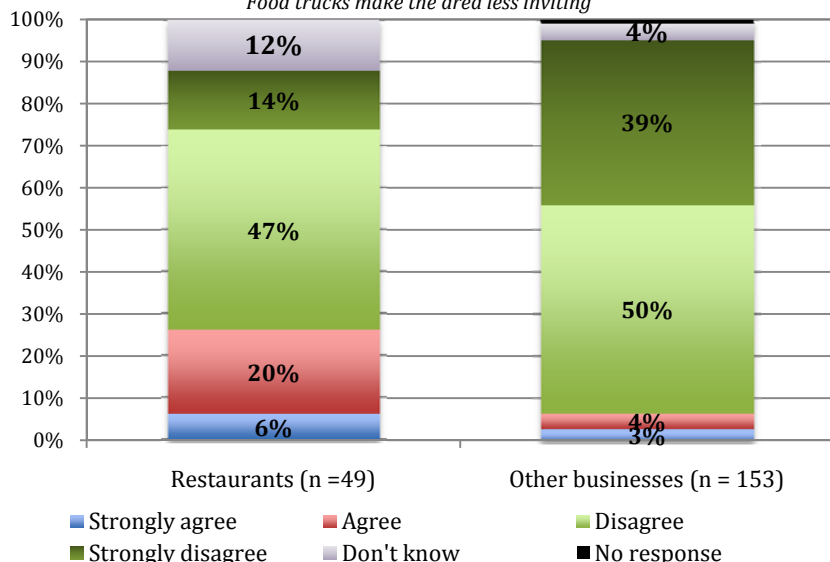
### Agreement about food trucks making area less inviting

*Food trucks make the area less inviting*



### Agreement about food trucks making area less inviting, by business type\*

*Food trucks make the area less inviting*



# Impact of food trucks on area

## Unfair competition for restaurants

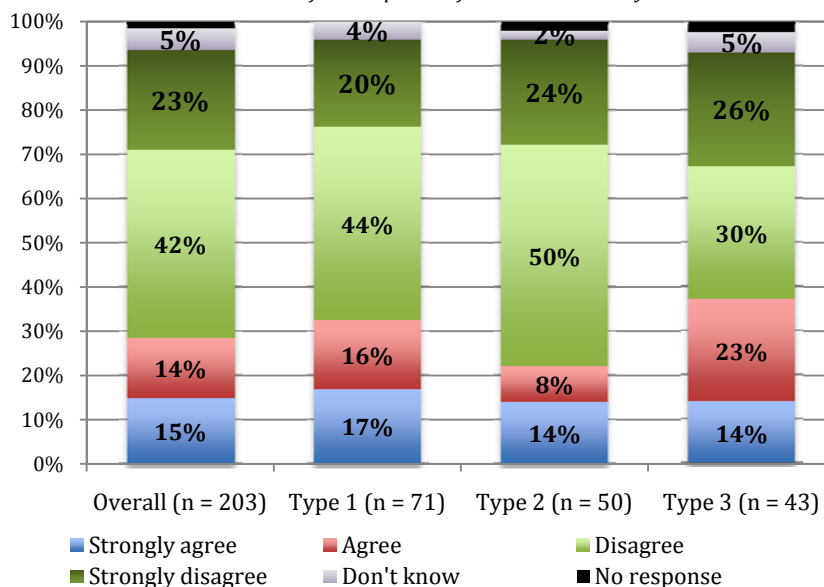
There is some sentiment among businesses that *food trucks are unfair competition for restaurants in their area*. About 3 in 10 agree or strongly agree with this statement, including 15% who strongly agree. More than 6 in 10 disagree or strongly disagree, including 23% who strongly disagree.

Examining results by business location shows similar results by area, with the majority disagreeing (disagree or strongly disagree) in each type.

Restaurants are statistically much more likely to agree or strongly agree that *food trucks are unfair competition for restaurants in their area*. Almost 7 in 10 restaurants agree or strongly agree, including 41% who strongly agree. Among all other businesses, just 2 in 10 agree or strongly agree, and only 7% of them strongly agree.

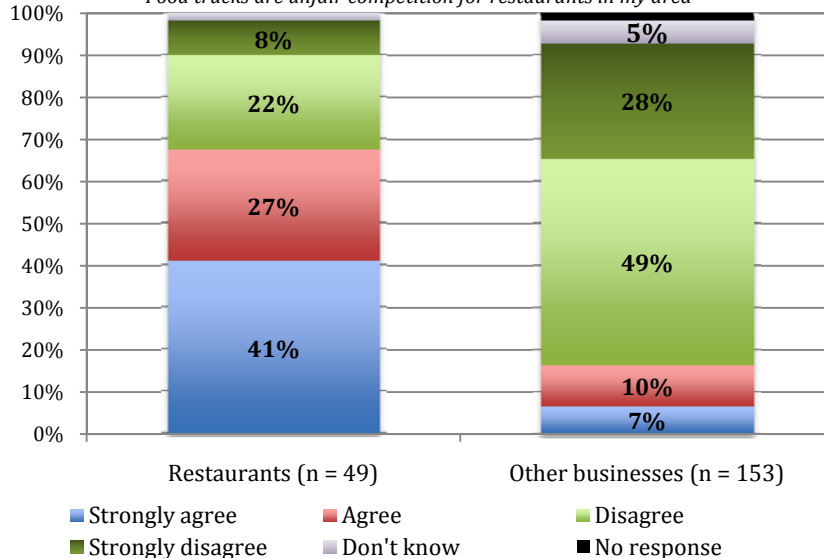
### Agreement that food trucks are unfair competition

*Food trucks are unfair competition for restaurants in my area*



### Agreement that food trucks are unfair competition, by business type\*

*Food trucks are unfair competition for restaurants in my area*



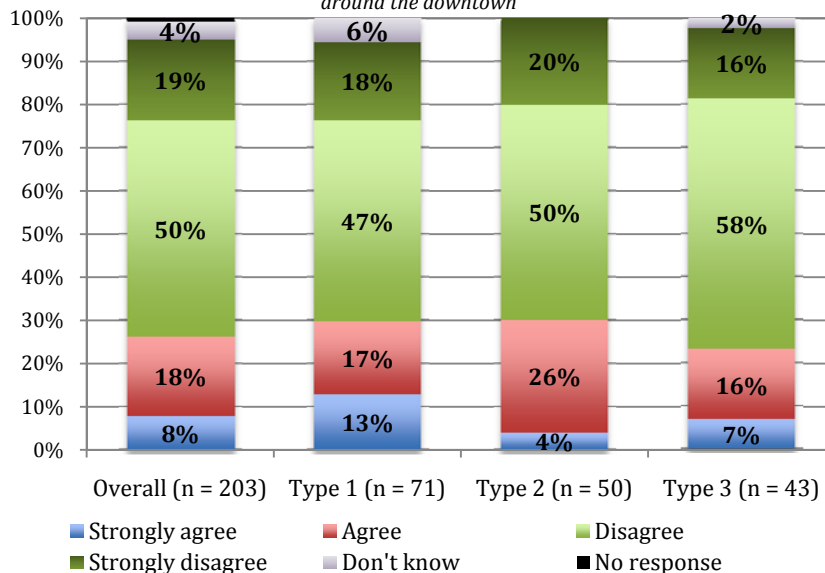
# Impact of food trucks on area

## Increase sidewalk congestion

Almost 3 in 10 businesses agree or strongly agree that *food trucks increase the congestion on the sidewalks, making it more difficult to walk around the downtown*. This includes 8% who strongly agree. On the other hand, the majority disagree or strongly disagree (about 7 in 10), with 19% strongly disagreeing. These overall results are in line with results by business location.

### Agreement about food trucks increasing congestion

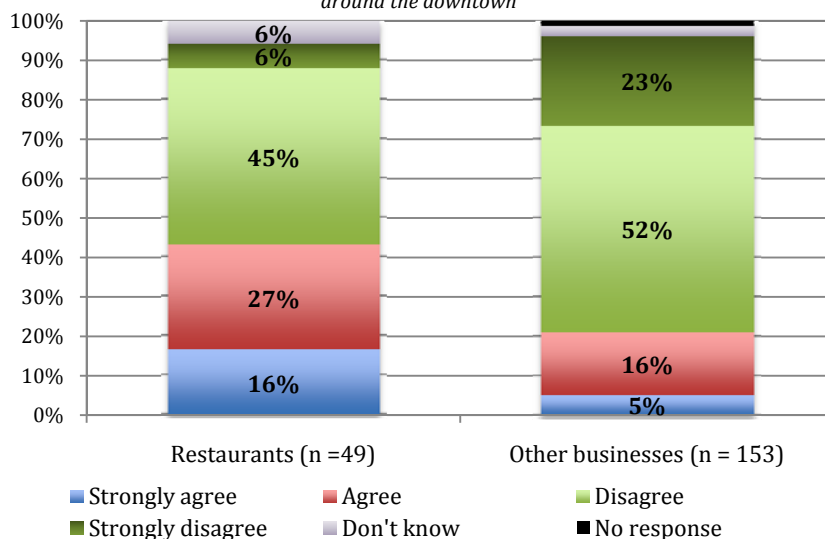
*Food trucks increase the congestion on the sidewalks, making it more difficult to walk around the downtown*



Restaurants are much more likely than other businesses to agree or strongly agree that food trucks *increase the congestion on the sidewalks, making it more difficult to walk around the downtown*. More than 4 in 10 restaurants agree compared to 2 in 10 other businesses. This result is somewhat confusing, given that restaurants were less likely than other businesses to say that food trucks increase foot traffic (indicating that many do not think that there are more people walking around downtown), yet congestion is increased with what some restaurants perceive as the same number of people.

### Agreement about food trucks increasing congestion, by business type\*

*Food trucks increase the congestion on the sidewalks, making it more difficult to walk around the downtown*

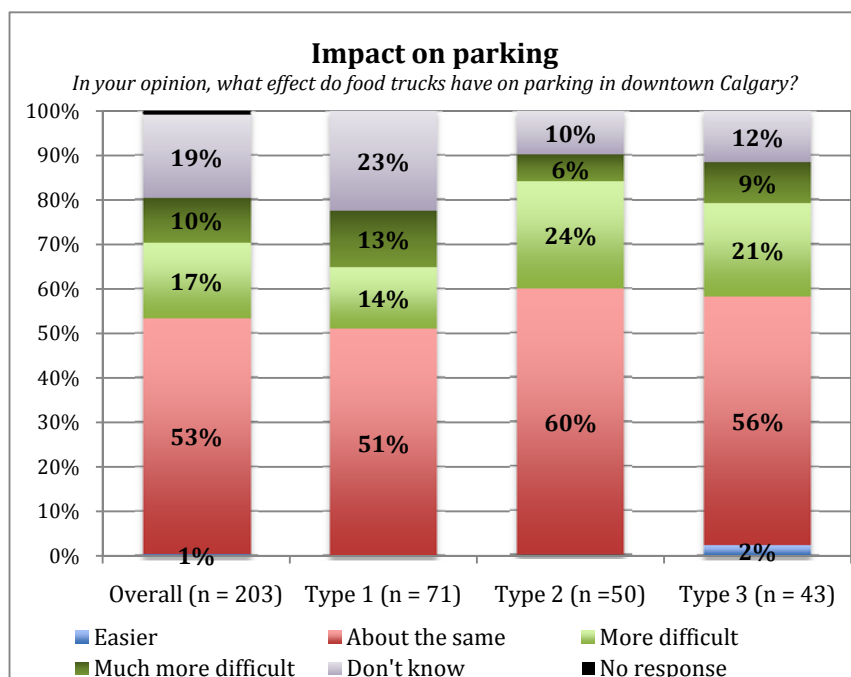




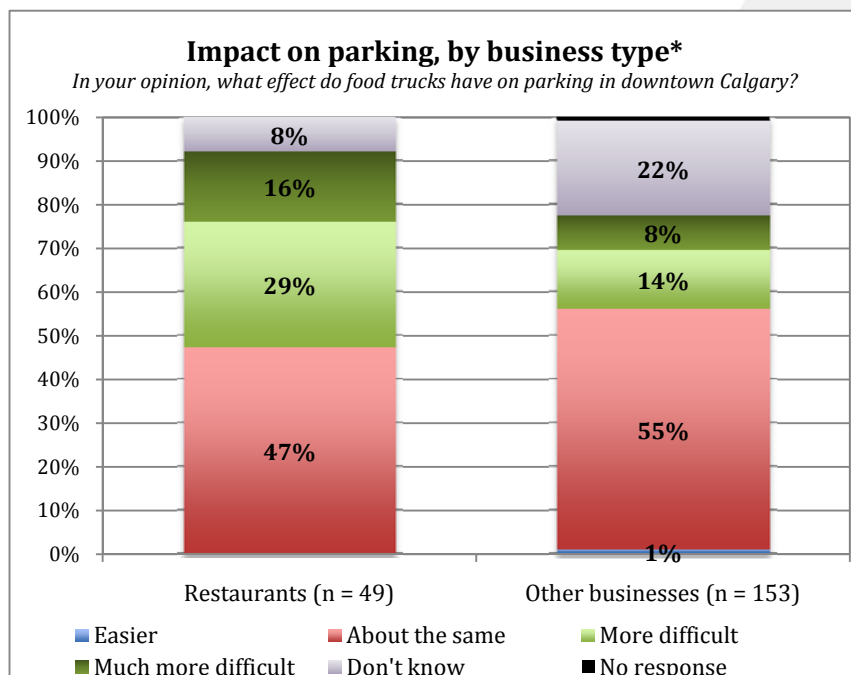
# Impact of food trucks on area

## Impact on parking

The majority of businesses (53%) indicate that *food trucks have no impact on parking downtown*. However, almost 3 in 10 say food trucks make it harder to park, including 10% who say it is much more difficult. Just 1% say that food trucks make it easier to find parking, and no businesses say they made it much easier.



Restaurants are statistically more likely than other businesses to say that *food trucks make it more or much more difficult to park in downtown Calgary*. Almost half of restaurants say food trucks make it more or much more difficult, which compares to about one-fifth of other businesses.



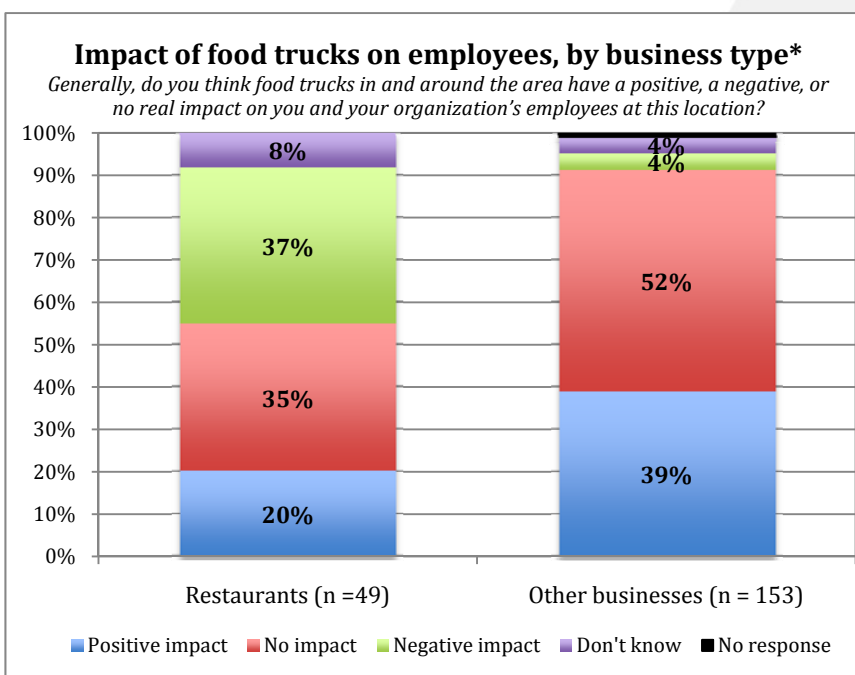
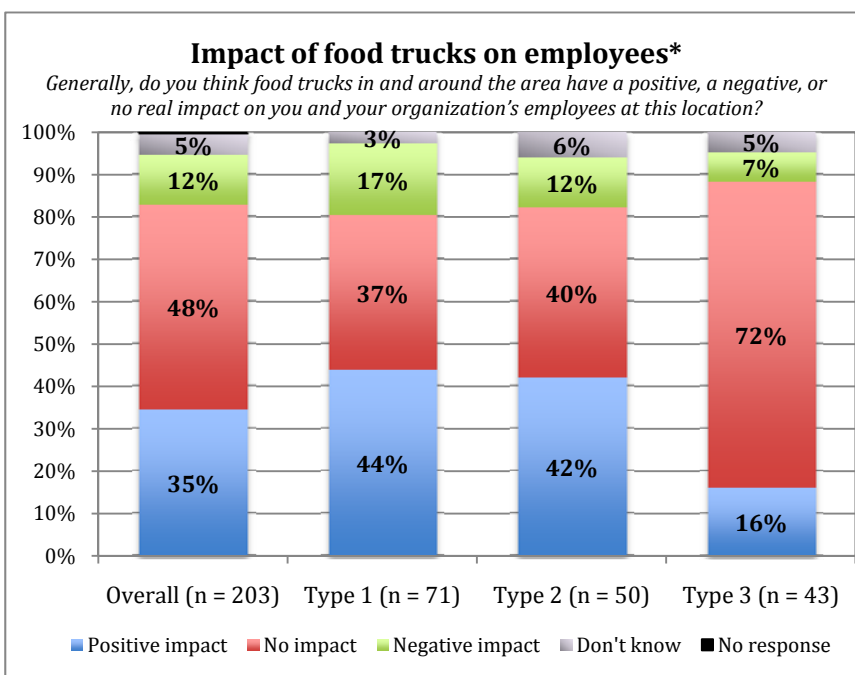
# Impact of food trucks on employees

## IMPACT ON EMPLOYEES

### Overall impact of food trucks on employees

The figure to the right indicates that about three times more businesses believe that food trucks have a positive impact (35%) on their employees than have a negative impact (12%), although the majority feels they do not have any real impact (48%). Results show that there is a statistically-significant difference among businesses by their location and the rating of the impact food trucks have on their employees. The closer businesses are to food trucks, the more likely they are to say that food trucks have an impact on their employees (both positive and negative). Those that are Type 3 (i.e., two or more blocks away) say that food trucks do not have much of an impact on their employees.

Restaurants are statistically more likely than other businesses to say that food trucks have a negative impact on their employees. Just 4% of other businesses say food trucks have a negative impact compared to 37% of restaurants. Of interest, 20% of restaurants say that food trucks have a positive impact on their employees.



# Impact of food trucks on employees

## Identified impacts on employees

Table 5 shows the types of impacts businesses identified food trucks have on their employees. These comments are broken down by those who indicated food trucks have a positive or negative impact (those who indicated food trucks did not have any impact on employees were not asked this question).

Those who say food trucks have positive impacts most often say the impact is that they *give their employees more options to eat* (53%) and *encourage people to get out during lunch hour* (30%). They also think they *add vibrancy to downtown* (24%). None of those who indicated they have positive impacts noted any negative impacts at all.

Those who said they have negative impacts on employees tend not to mention issues that directly relate to employees but instead mention issues that relate to their business. This is not surprising, given that almost all of the businesses that said food trucks have a negative impact were restaurants. The common issues mentioned were business impacts (which might affect employees if the business had to reduce hours for employees or cut back wages due to lower revenue). These issues most commonly were *having unfair competition for restaurants* (29%), *having clients less likely to use their business* (29%), or *people are less likely to eat at restaurants* (25%).

It should be noted that one business who said food trucks had a negative impact also mentioned the positive impacts they have for employees (one mentioned that food trucks both *encourage people to get out on the street during lunch* and *encourage people to come downtown*).

**Table 5: Types of impacts on employees**

*In your own words, please explain the types of positive and/or negative impacts food trucks have had on you and your employees.*

	Positive impacts (n = 70)	Negative impacts* (n = 24)
<b>Positive impacts</b>		
Provide more options of where or what to eat	53%	-
Encourage people to get out on the street during lunch hour	30%	4%
Add to vibrancy of downtown	24%	-
Socialize	17%	-
Make getting food more convenient/faster	14%	-
Encourage people to come downtown	6%	4%
Reasonable cost factor	4%	-
<b>Negative impacts</b>		
Are unfair competition for restaurants	-	29%
Make clients/customers less likely to visit/use our business	-	29%
People are less likely to eat at restaurants	-	25%
They don't pay rent	-	21%
Makes our business less visible	-	8%
Litter	-	8%
Food safety	-	8%
Make the area less inviting	-	4%
Increase congestion on the sidewalks/difficult to walk	-	4%
Noise	-	4%
Make it difficult to get to our business	-	4%
Make it more difficult for customers/clients to find parking	-	4%
Other	23%	8%
No response	17%	17%
Note: Businesses could provide more than one response; therefore, columns will sum to more than 100%. * Caution, small sample size		



# Impact of food trucks on employees

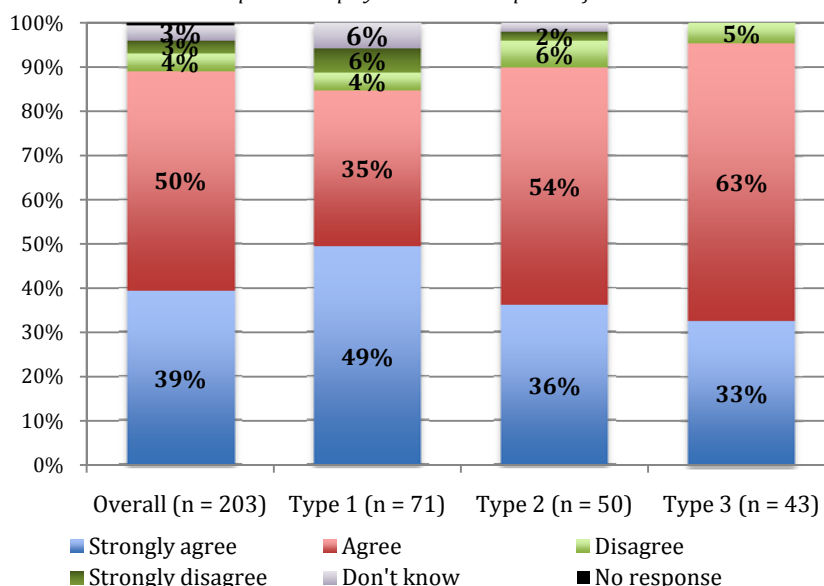
## Other impacts on employees

### More options of where to eat

Among all business, almost 9 in 10 agree or strongly agree, including 39% who strongly agree, that *food trucks provide employees with more options of where to eat*. Although it is not statistically significant, the closer businesses are to where food trucks commonly are parked, the more likely they are to strongly agree that they give employees more options of where to eat. Of interest, they also are more likely to disagree or strongly disagree, as the proportion rises from 5% of those in Type 3 to 10% of those in Type 1.

#### Agreement about providing more options of where to eat

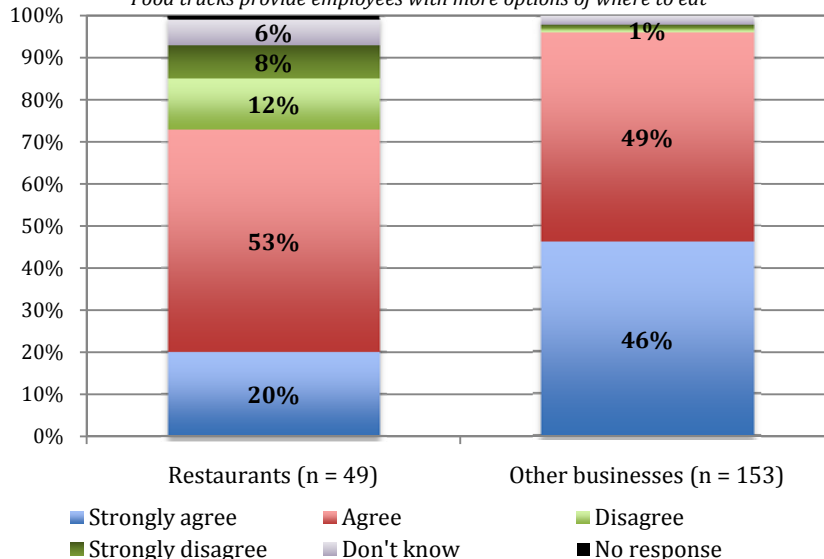
*Food trucks provide employees with more options of where to eat*



As might be expected, restaurants are much less likely than other businesses to agree or strongly agree that *food trucks provide employees with more options of where to eat*. The result is most telling for the proportion that disagrees or strongly disagrees. The combined proportion is about 2 in 10 restaurants, but just 1% of all other businesses.

#### Agreement about providing more options of where to eat, by business type\*

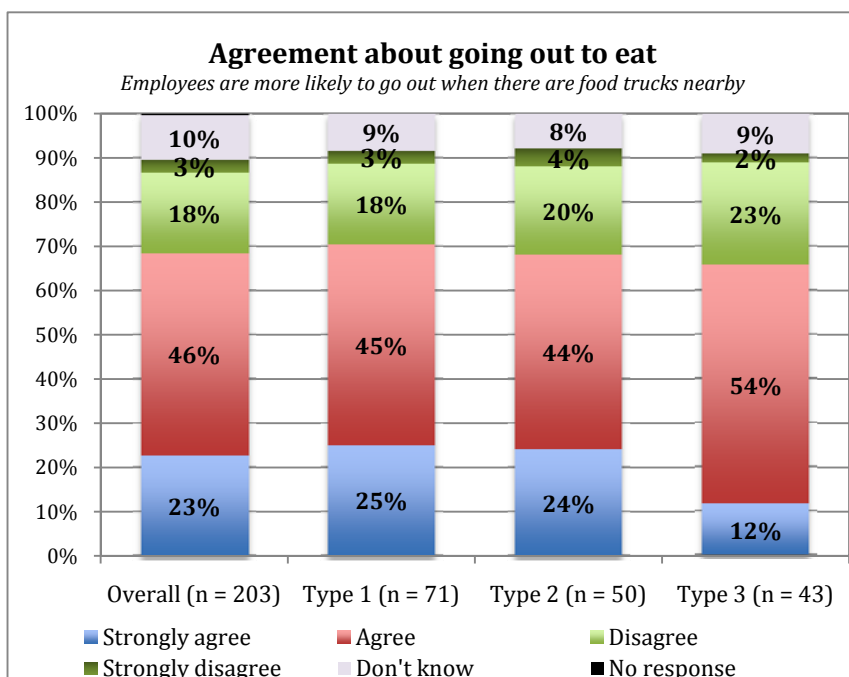
*Food trucks provide employees with more options of where to eat*



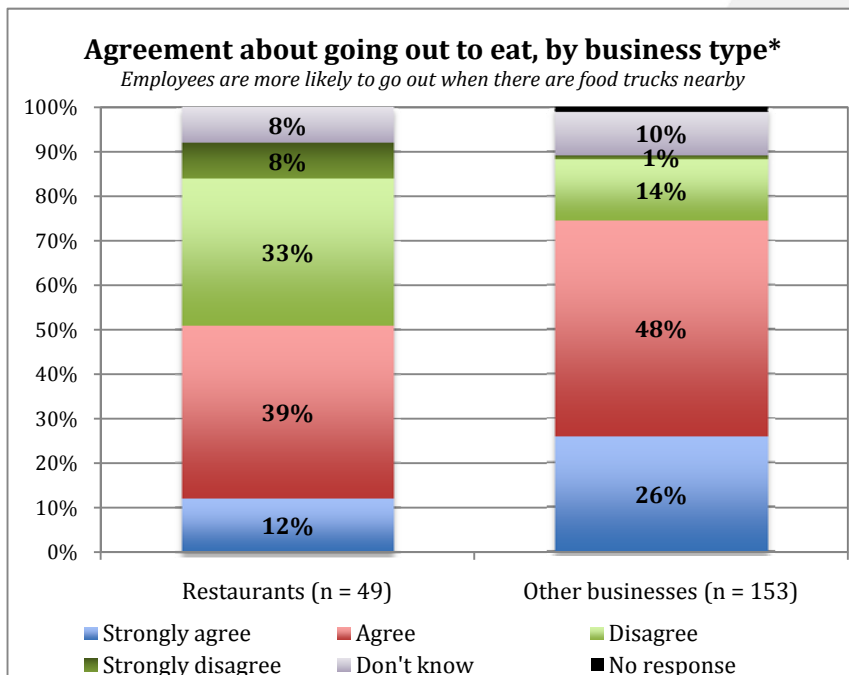
# Impact of food trucks on employees

## Increase likelihood of going out to eat

About 7 in 10 businesses agree or strongly agree that employees *are more likely to go out to eat when there are food trucks nearby*, including 23% who strongly agree. Of interest, there is very little difference by business location. Although those in Type 1 or Type 2 businesses are about twice as likely as Type 3 businesses to strongly agree, the combined proportion of agreement is virtually the same. This seems to indicate that the food trucks' draw is fairly far reaching.



Restaurants are much less likely than other businesses to agree or strongly agree that *employees are more likely to go out to eat when there are food trucks nearby*. About half of the restaurants agree or strongly agree compared to more than 7 in 10 other businesses.



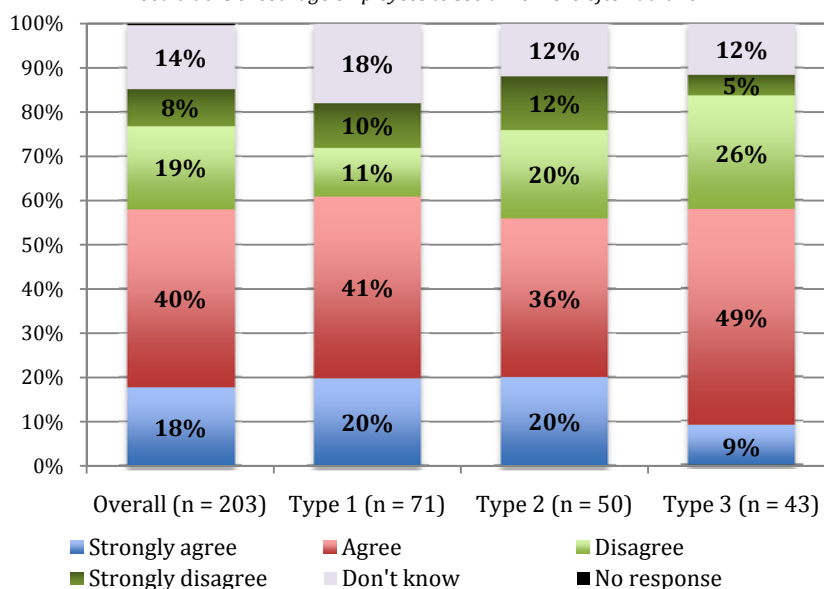
# Impact of food trucks on employees

## Food trucks encourage staff to socialize

Almost 6 in 10 businesses agree or strongly agree that *food trucks encourage staff to socialize*, including 18% who strongly agree. Results are fairly similar across businesses in terms of their proximity to food trucks. Again, results show that although Type 1 and Type 2 are more likely to strongly agree than Type 3, when combined with those who agree, total agreement is virtually the same.

### Agreement about encouraging employees to socialize

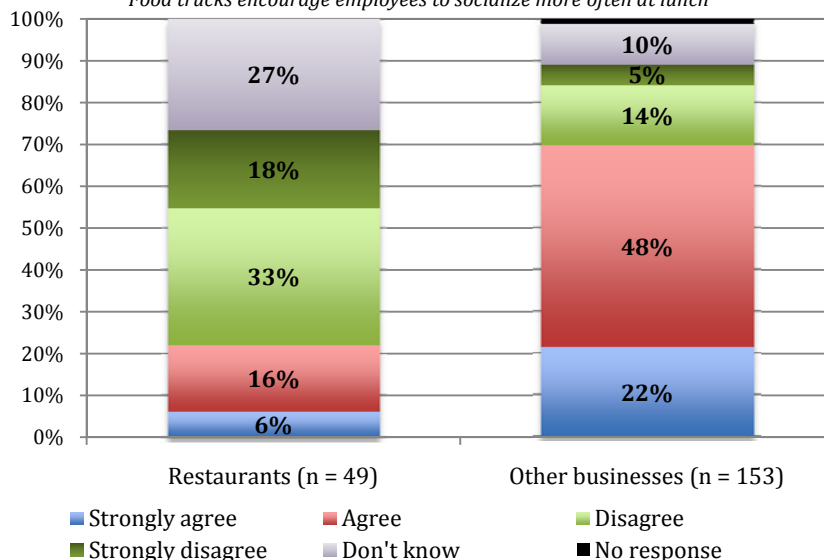
*Food trucks encourage employees to socialize more often at lunch*



Businesses other than restaurants are much more likely than restaurants to agree or strongly agree that *food trucks encourage staff to socialize more often at lunch*. Just 2 in 10 restaurants agree or strongly agree compared to 7 in 10 other businesses. When combined with results from the previous page (*more likely to go out for lunch*), this does seem to indicate that food trucks have social aspects for other businesses more so than they do for employees of restaurants.

### Agreement about encouraging employees to socialize, by business type\*

*Food trucks encourage employees to socialize more often at lunch*

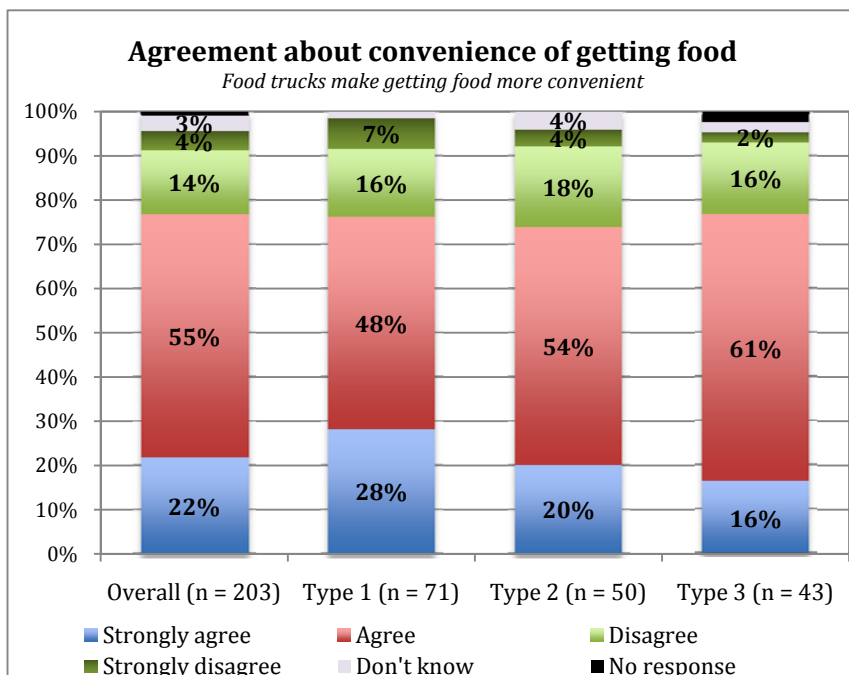




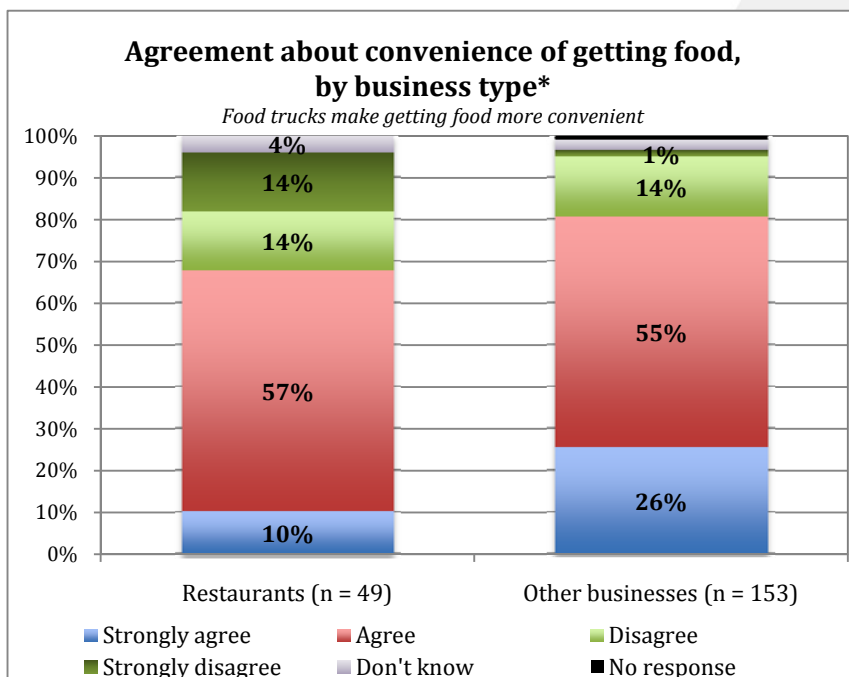
# Impact of food trucks on employees

## Convenience of getting food

Almost 8 in 10 businesses agree or strongly agree that *food trucks make getting food more convenient*, including 22% who strongly agree. Again, results show a similar pattern by proximity to food trucks, where those who are closer are more likely to strongly agree, but total agreement among the three types is virtually the same. Although interesting, the differences are not statistically significant.



Restaurants are statistically less likely than other businesses to strongly agree (10% versus 26%). However, the difference between the combined agreement is not as large as it has been for other questions. Combined agreement indicates that about 7 in 10 restaurants agree that *food trucks make getting food more convenient* compared to about 8 in 10 other businesses.



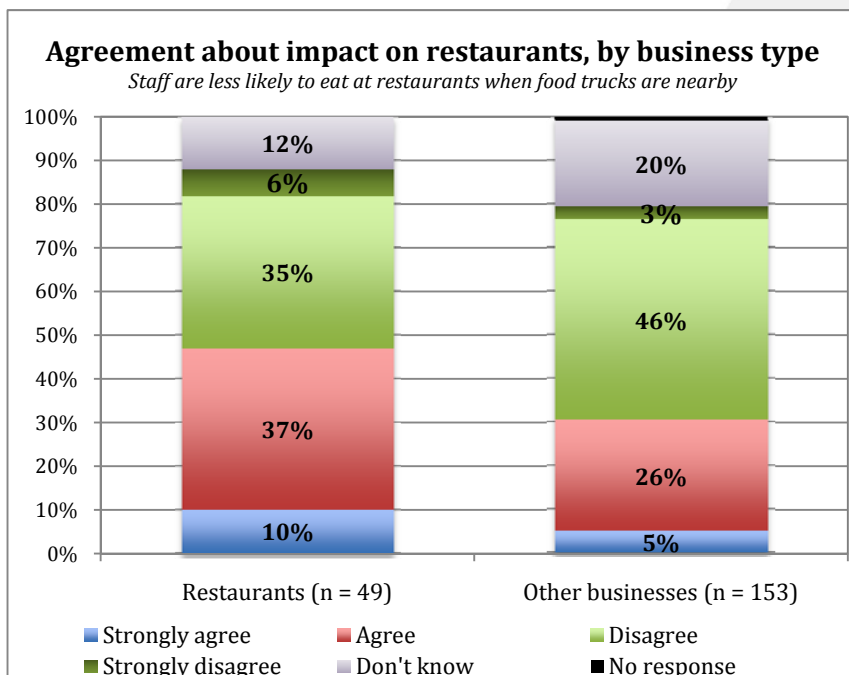
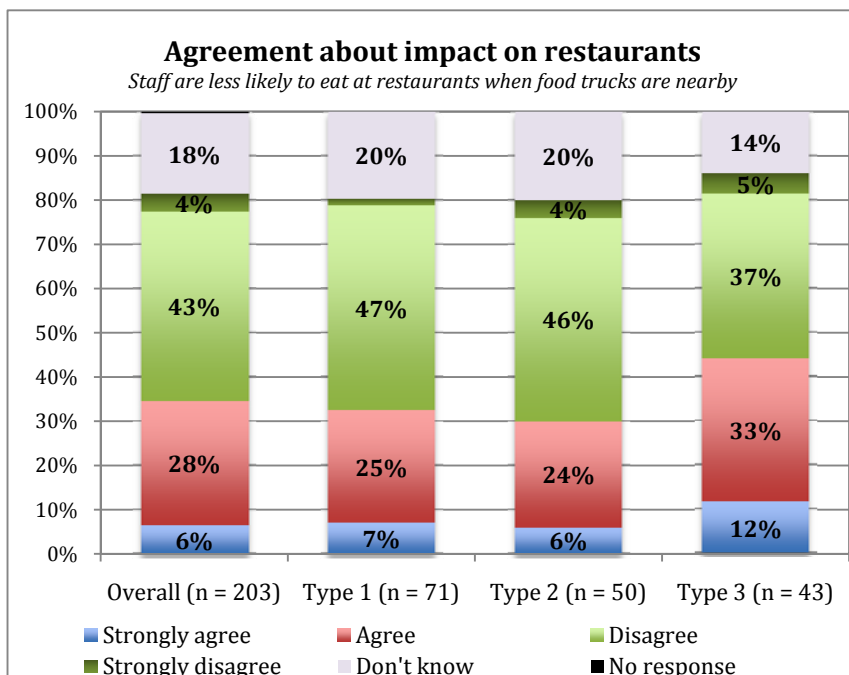
# Impact of food trucks on employees

## Impact on restaurants

Although many businesses say that food trucks encourage staff to eat out more, for many it does not appear to be a substitute for eating at restaurants. Specifically, about 1 in 3 businesses agree or strongly agree that *staff are less likely to eat at restaurants when food trucks are nearby* (6% strongly agree); however, almost half are in disagreement (about 4% strongly disagree), indicating that their food truck use does not cause them to frequent restaurants less often.

Although not statistically significant, Type 3 businesses (those furthest from food trucks) are more likely than Type 1 or Type 2 to agree or strongly agree with this statement. Because of the wording of the question (i.e., *nearby*), perhaps these businesses are thinking about times when food trucks might be parked on their block and the impact they have. That is, they may be thinking of times when food trucks are not parked two or more blocks from their building.

Although results in the figure to the right are not statistically significant, it is interesting that restaurants are more likely than other businesses to agree or strongly agree that *staff are less likely to eat at restaurants when food trucks are nearby*. About half of restaurants agree or strongly agree compared to 3 in 10 other businesses.



# Impact of food trucks on customers or clients

## IMPACT ON CUSTOMERS OR CLIENTS

### Overall impact of food trucks on customers or clients

The figure to the right indicates that the majority of businesses (53%) believe that food trucks have no real impact on their customers or clients, while 21% believe they have a positive impact and only 10% believe they have a negative impact.

When examining results by proximity to food trucks, results seem to indicate that the closer businesses are to food trucks, the less likely they are to be able to assess the impact food trucks have on their customers or clients. For

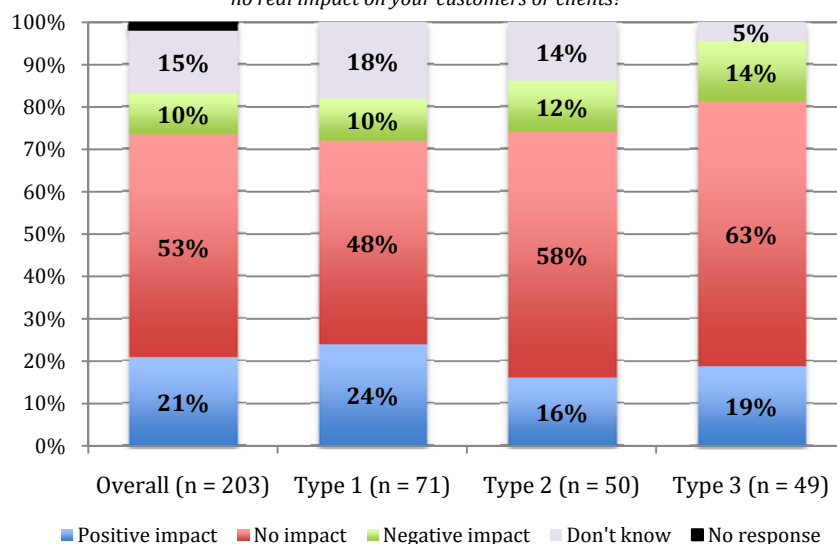
instance, 18% of Type 1 businesses said they do not know what impact food trucks have on clients/customers, which compares to just 5% of Type 3 customers. Perhaps this is because those businesses that are further away are better able to gauge that there is no impact.

The vast majority of businesses that indicate that food trucks have a negative impact on clients/customers are restaurants. Overall, 37% of restaurants say food trucks have a negative impact, compared to just 2% of other businesses.

Somewhat surprisingly, 14% of restaurants say that food trucks have a positive impact.

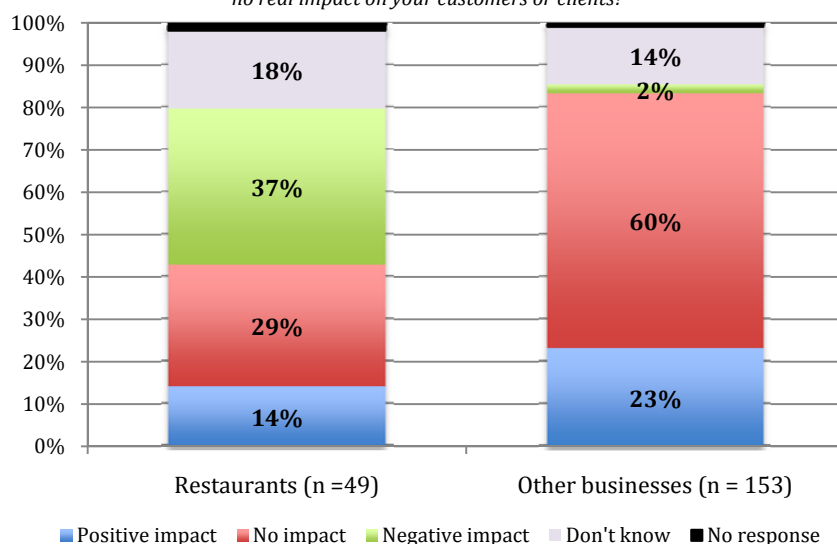
### Impact of food trucks on customers or clients

Generally, do you think food trucks in and around the area have a positive, a negative, or no real impact on your customers or clients?



### Impact of food trucks on employees, by business type\*

Generally, do you think food trucks in and around the area have a positive, a negative, or no real impact on your customers or clients?





# Impact of food trucks on customers or clients

## Identified impacts on customers and clients

Table 6 shows the types of impacts businesses identified food trucks have on their customers and clients. These comments are broken down by those who indicated food trucks have a positive or negative impact (those who indicated food trucks did not have any impact on customers and clients were not asked this question).

The most common positive impacts are that food trucks *provide more options of where to eat* (31%) and *add vibrancy to downtown* (21%). Of note, one business that said food trucks have a positive impact also gave a negative aspect for food trucks (*make it more difficult for customers/clients to find parking*).

For negative impacts, they again appear to be based on the business impact rather than the direct impact for customers. For example, the most common negative impact that was supposed to be focused on customers/clients was that *customers/clients are less likely to eat at restaurants* (33%). This is unlikely to be a negative impact for customers/clients rather than for restaurants directly.

**Table 6: Types of impacts on customers and clients**

*In your own words, please explain the types of positive and/or negative impacts food trucks have had on your customers or clients.*

	Positive impacts (n = 42)	Negative impacts (n = 21)*
<b>Positive mentions</b>		
Provide more options of where to eat/what to eat	31%	-
Add to vibrancy of downtown	21%	-
Encourage people to get out on the street during lunch hour	14%	-
Socialize	14%	-
Encourage people to come downtown	12%	-
Make getting food more convenient/faster	12%	-
<b>Negative mentions</b>		
People are less likely to eat at restaurants	-	33%
Are unfair competition for restaurants	-	14%
Food safety	-	14%
Make clients/customers less likely to visit/use our business	-	14%
Block our business/make us less visible	-	10%
Make it more difficult for customers/clients to find parking	5%	10%
Make the area less inviting	-	5%
Increase congestion on the sidewalks/difficult to walk	-	5%
They don't pay rent; I do/unfair	-	5%
Other	5%	5%
No response	29%	14%
Note: Businesses could provide more than one response; therefore, columns will sum to more than 100%.		
* Caution, small sample size.		

# Impact of food trucks on customers or clients

## Other impacts on customers or clients

### More options of where to eat

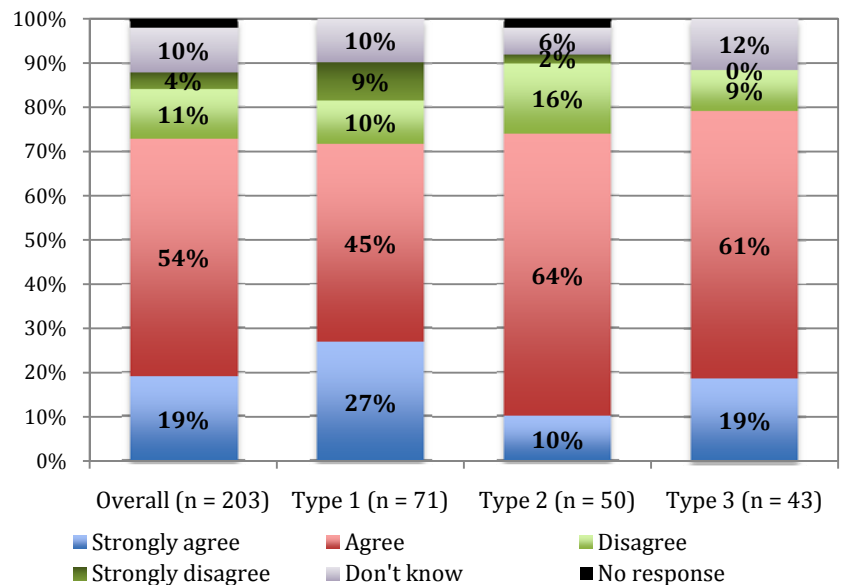
Among all business, almost 3 in 4 agree, including 19% who strongly agree, that *food trucks provide their customers/clients with greater options as to where to eat*.

Although there are some differences among businesses by proximity to food trucks for the proportion of businesses who strongly agree with this statement, the combined agreement (agree and strongly agree) is very similar among the three types. This is likely why the differences are not statistically significant.

Although statistically less positive than other types of businesses, more than 6 in 10 restaurants agree or strongly agree that *food trucks provide their customers/clients with greater options as to where to eat*.

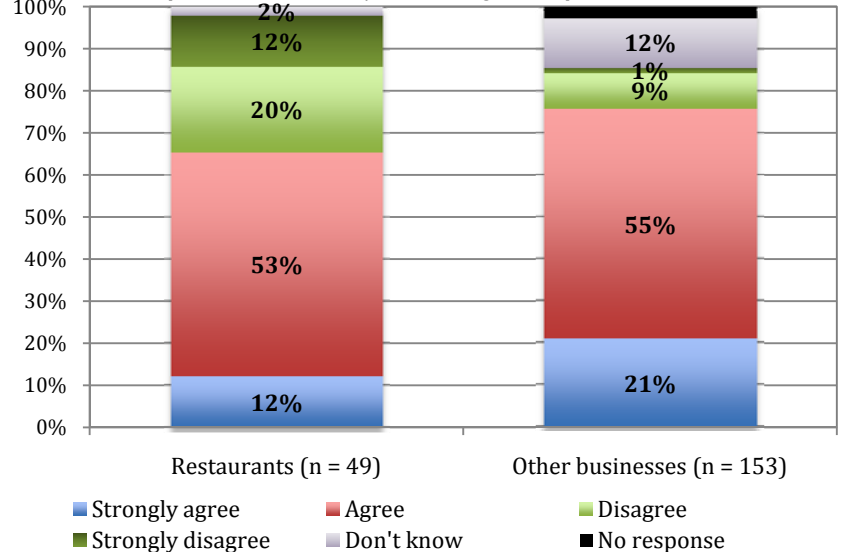
### Agreement about providing greater options to eat

*Food trucks provide our customers/clients with greater options as to where to eat*



### Agreement about providing greater options to eat, by business type\*

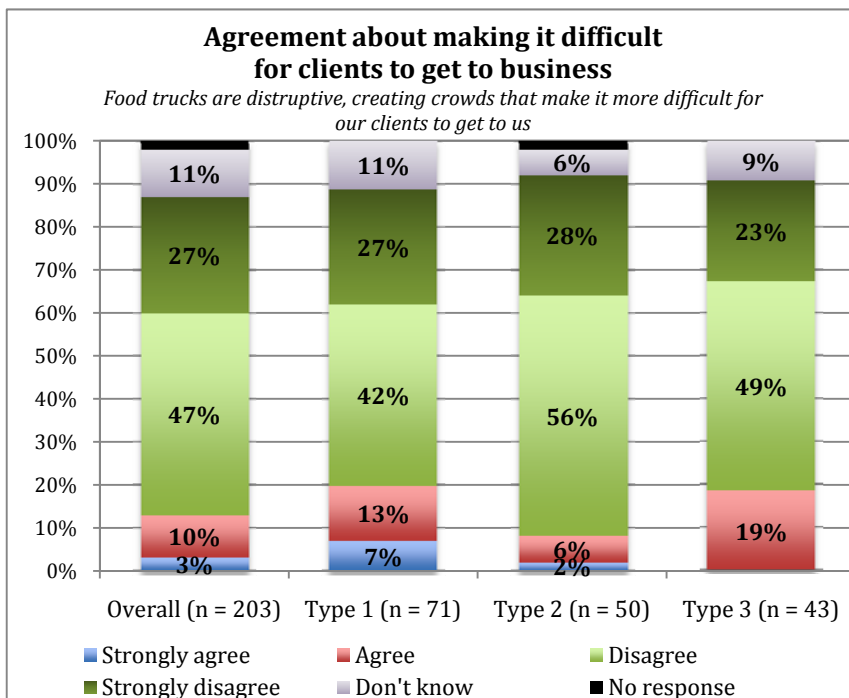
*Food trucks provide our customers/clients with greater options as to where to eat*



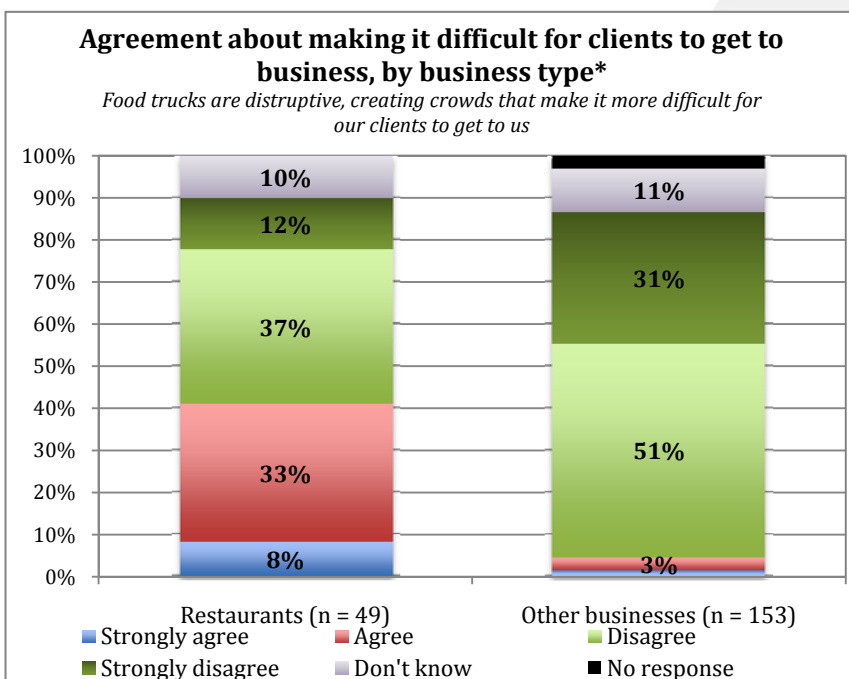
# Impact of food trucks on customers or clients

## Food truck crowds make it difficult for clients to get to us

Among all business, slightly more than 1 in 10 agree (including 3% who strongly agree) that *food trucks are disruptive, creating crowds that make it more difficult for their clients to get to them*. Almost three-quarters of businesses disagree or strongly disagree with this statement, with 27% strongly disagreeing. This demonstrates that the majority of businesses do not perceive food truck crowds to have a negative impact.



Restaurants are much more likely than other businesses to agree or strongly agree that *food trucks are disruptive, creating crowds that make it more difficult for their clients to get to them*. About 4 in 10 agree or strongly agree compared to just 1 in 25 in other businesses.

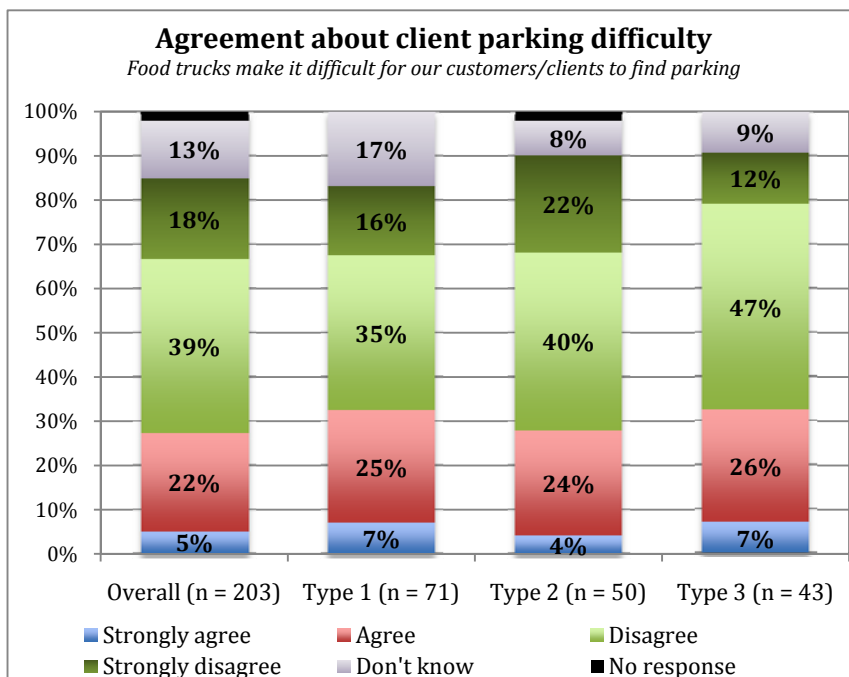




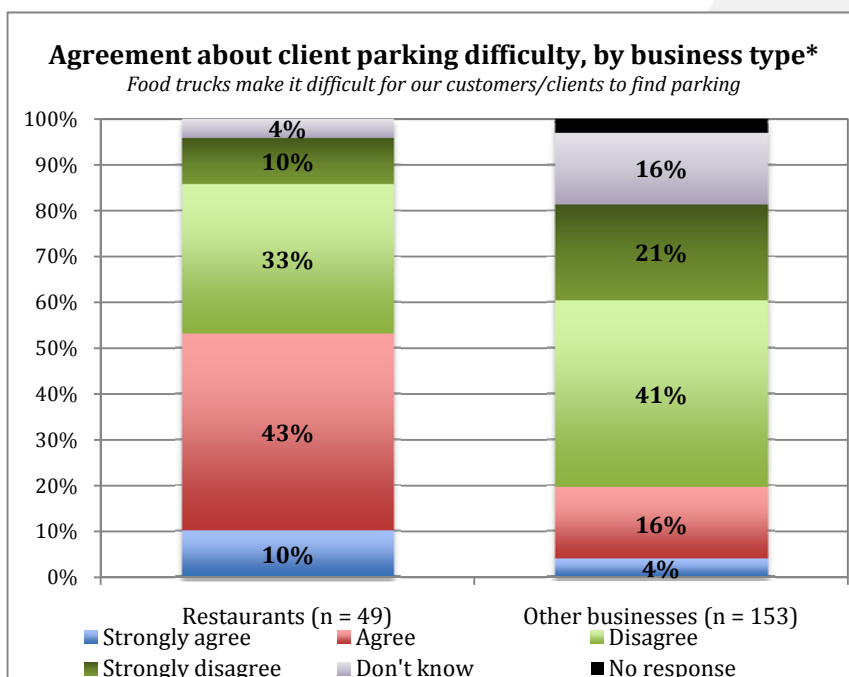
# Impact of food trucks on customers or clients

## Food trucks' impact on client parking

Among all businesses, about 1 in 4 agree or strongly agree that *food trucks make it more difficult for their customers/clients to find parking*, including 5% who strongly agree. However, the vast majority (almost 6 in 10) disagree or strongly disagree, including 18% who strongly disagree. There is very little difference by proximity to food trucks, indicating that being closer to trucks does not seem to affect the impact they have on parking.



Restaurants are statistically more likely to agree or strongly agree that *food trucks make it more difficult for their customers/clients to find parking*. Over half agree or strongly agree compared to 2 in 10 other businesses.



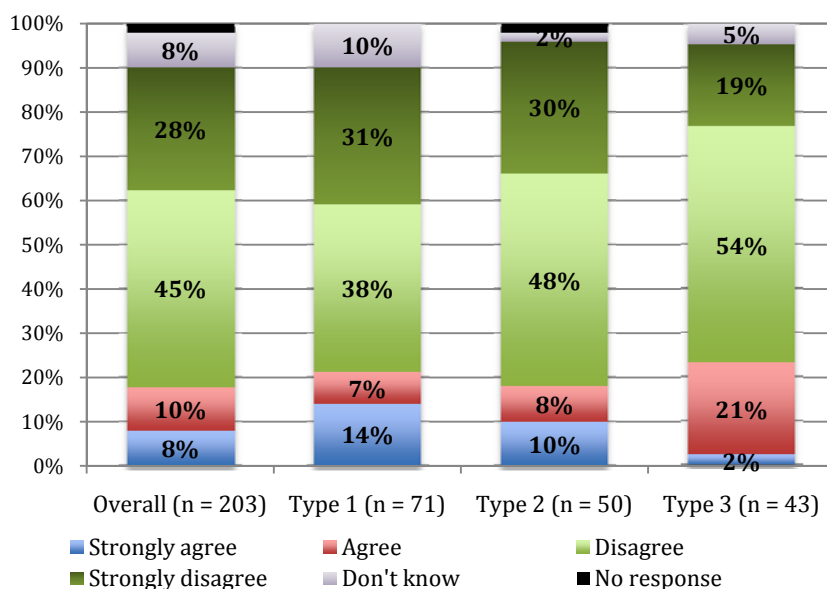
# Impact of food trucks on customers or clients

## Food trucks' impact on business use

Among all businesses, about 2 in 10 agree or strongly agree that *food trucks make their customers/client less likely to visit/use their business*, including 8% who strongly agree. Over 7 in 10 disagree or strongly disagree, including 28% who strongly disagree. There are no statistical or practical differences in responses by where businesses are located.

### Agreement about clients being less likely to use business

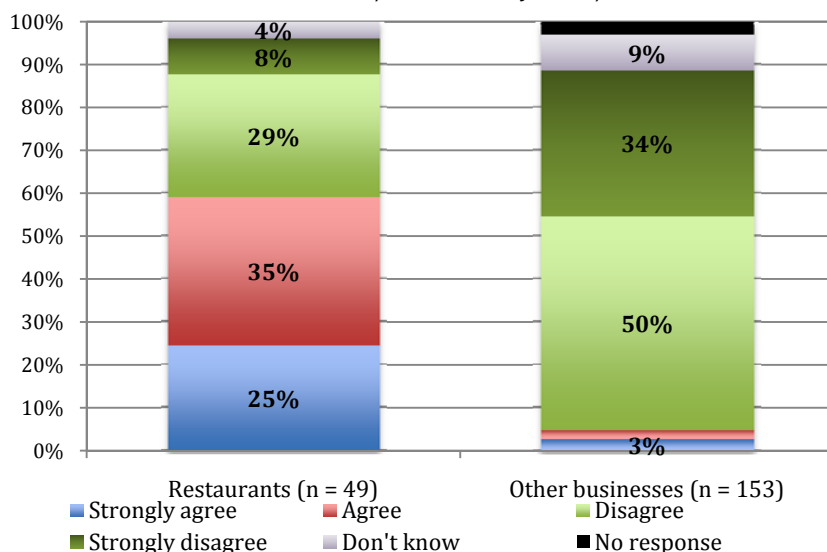
*Food trucks make our customers/clients less likely to visit/use our business*



Restaurants are statistically much more likely than other businesses to agree or strongly agree that *food trucks make their customers/client less likely to visit/use their business*. About 6 in 10 restaurants agree or strongly agree compared to 1 in 25 other businesses. In addition, 25% of restaurants strongly agree compared to just 3% of other businesses.

### Agreement about clients being less likely to use business, by business type\*

*Food trucks make our customers/clients less likely to visit/use our business*



# Impact of food trucks on revenue

## FINANCIAL IMPACT ON BUSINESSES

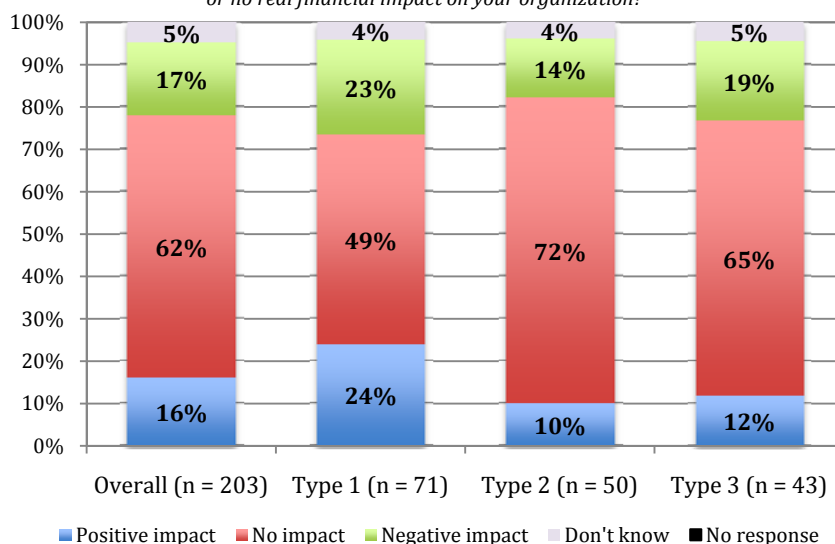
### Overall financial impact of food trucks on businesses

The figure to the right indicates that the majority of businesses (62%) believe that food trucks have no real financial impact on their organization. However, about as many believe that food trucks have a positive impact (16%) on their business as those who believe they have a negative impact (17%). Although not statistically significant, those who are closest to food trucks (i.e., Type 1) are about twice as likely as Type 2 or Type 3 to say that food trucks have a positive financial impact for their business (24% for Type 1 versus 10% for Type 2 and 12% for Type 3).

As might be expected based on responses to previously-reported questions, restaurants are statistically much more likely than other businesses to say the food trucks have a negative impact on their business. Over half (53%) of restaurants say food trucks have a negative impact compared to just 5% of other businesses.

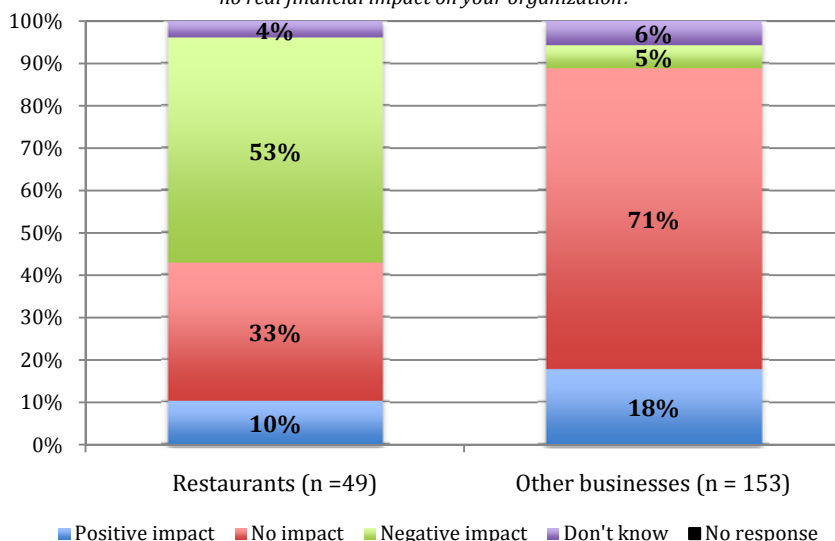
### Financial impact of food trucks

Generally, do you think food trucks in and around downtown have a positive, a negative, or no real financial impact on your organization?



### Financial impact of food trucks, by business type\*

Generally, do you think food trucks in and around downtown have a positive, a negative, or no real financial impact on your organization?





# Impact of food trucks on revenue

## Identified financial impacts

Table 7 shows the types of impacts financial businesses identified food trucks have on businesses. These comments are broken down by those who indicated food trucks have a positive or negative impact (those who indicated food trucks did not have any financial impact were not asked this question).

Those who say it has a positive financial impact say this is primarily because food trucks *increase foot traffic* (22%), *add vibrancy to downtown* (19%), or *add convenience* (13%). However, 41% of those who said that food trucks have a positive financial impact were not able to identify in what way food trucks positively impact the finances of their businesses.

When identifying the negative financial impacts, the biggest impact is that food trucks cause businesses to *lose customers* (56%), but also that businesses are competing against *businesses that don't pay rent* (15%) or food trucks are *unfair competition* (12%). It should be noted that two businesses who said food trucks have negative impacts on their finances indicated a positive impact, which was there is *increased foot traffic* (but mentioned that the traffic does not result in higher sales).

**Table 7: Types of financial impacts on businesses**

*In your own words, please explain the types of positive and/or negative impacts food trucks have had on the finances of your business.*

	Positive impacts (n = 32)	Negative impacts (n = 34)
<b>Positive mentions</b>		
Increase foot traffic	22%	6%
Adds vibrancy/gets people outside	19%	-
Adds variety/convenience	13%	-
<b>Negative mentions</b>		
Lose customers/less traffic	-	56%
Still need to pay high rent/business tax	-	15%
Unfair competition	-	12%
No impact	6%	-
Other	3%	21%
No response	41%	18%
Note: Businesses could provide more than one response; therefore, columns will sum to more than 100%.		

# Impact of food trucks on revenue

## Impact on revenue

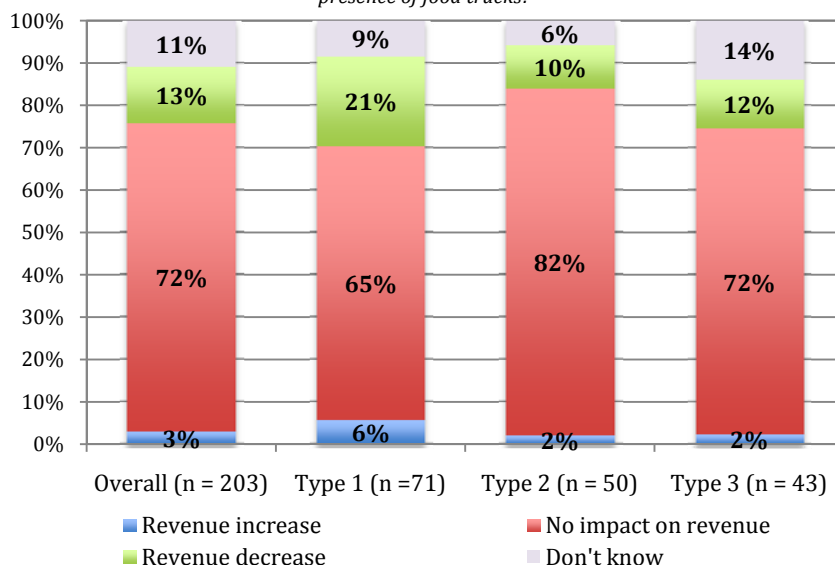
The figure to the right indicates that the majority of businesses (72%) believe that food trucks have no impact on their revenue. However, 13% believe they account for a revenue decrease, while 3% say they account for an increase.

Although not statistically significant, results indicate that those closer to food trucks tend to be more likely to indicate food trucks cause either a revenue increase (6% among Type 1 compared to 2% in Type 2 and Type 3 businesses) or revenue decrease (21% among Type 1 compared to 10% in Type 2 and 12% in Type 3 businesses).

Restaurants are much more likely than other businesses to say food trucks have a negative impact on their revenue (47% versus just 3%).

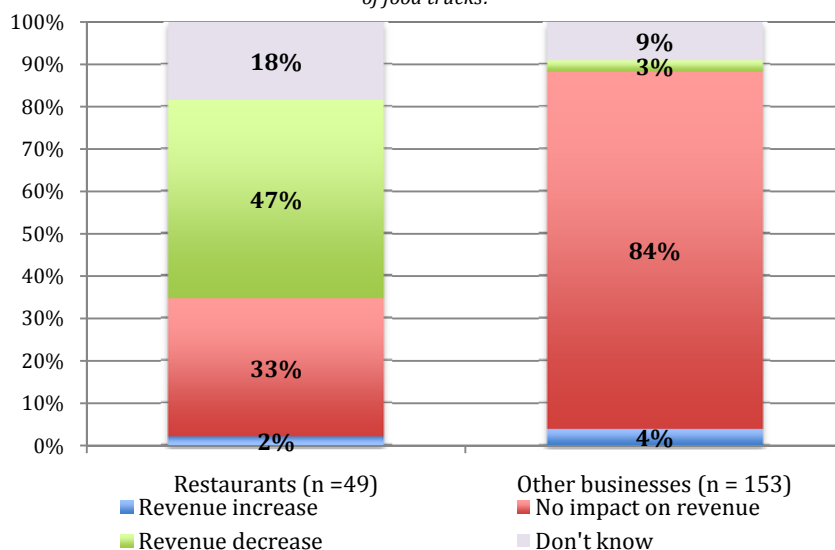
### Revenue impact of food trucks

*Do you attribute any increase or decrease in revenue in your organization to the presence of food trucks?*



### Revenue impact of food trucks, by business type\*

*Do you attribute any increase or decrease in revenue in your organization to the presence of food trucks?*



# Impact of food trucks on revenue

## Percentage change in revenue

Table 8 shows the percentage change in sales businesses attributed to the presence of food trucks in the area. The number of businesses reporting an increase in revenue equaled just seven businesses, so results should be interpreted with caution. It should be noted that of the seven, four indicated an increase of 5% or less.

Among those who indicated a decrease (27 businesses out of 200), the decreases tended to fluctuate, with about half saying the decrease was 10% or less and 4 in 10 saying more than 10%.

**Table 8: Revenue impact of food trucks**

*What percentage decrease/increase in sales at this location do you attribute to the presence of food trucks?*

	Percentage increase (n = 7)*	Percentage decrease (n = 27)*
Less than 2%	29%	4%
3% to 5%	29%	22%
6% to 10%	14%	22%
11% to 15%	14%	11%
16% to 20%	-	7%
Over 20%	-	19%
Don't know	14%	11%
No response	-	4%

\* Caution, very small sample sizes.



# Impact of food trucks on revenue

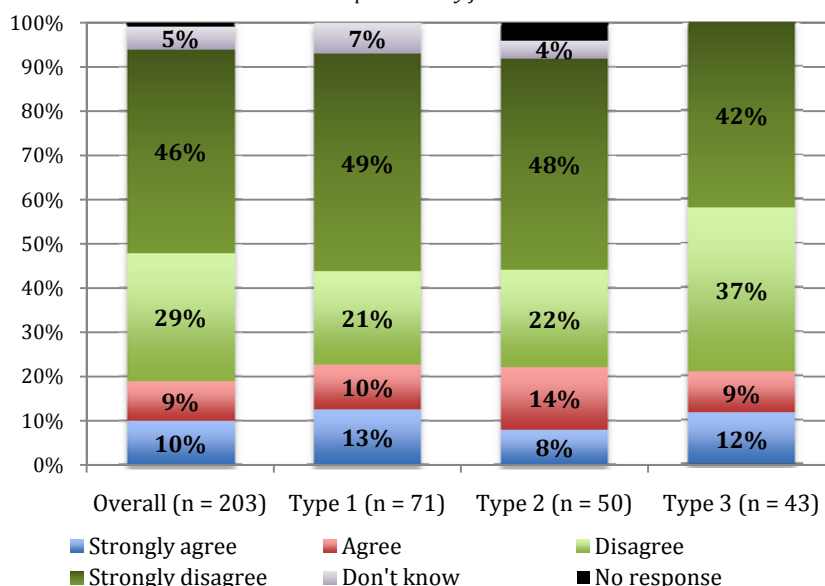
## Other financial impacts

### Compete for customers

Among all businesses, about 2 in 10 agree, including 10% who strongly agree, that *food trucks compete directly for their customers*. However, more than three times as many disagree, including 46% who strongly disagree. Looking at results in the figure to the right indicates very little difference by businesses' proximity to food trucks.

#### Agreement about competing directly for customers

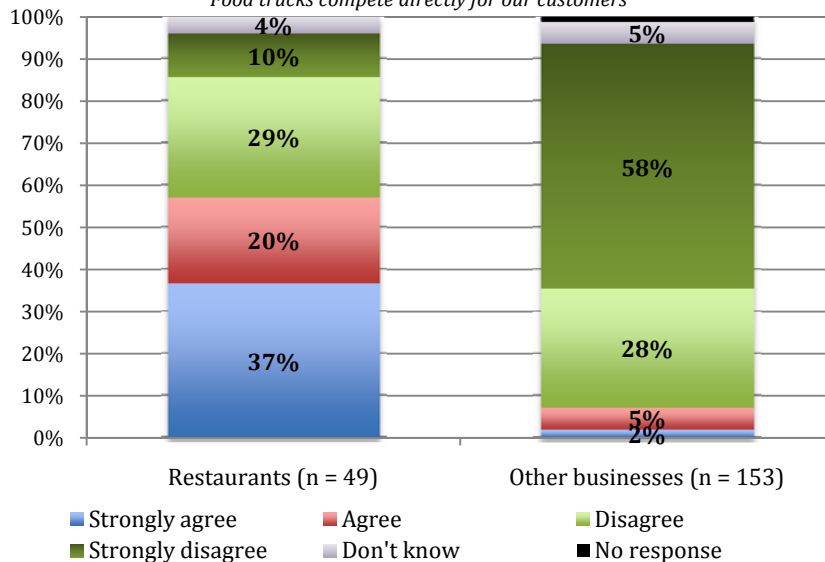
*Food trucks compete directly for our customers*



As would be expected, restaurants are much more likely than other businesses to agree or strongly agree that *food trucks compete directly for their customers*. Almost 6 in 10 restaurants agree or strongly agree compared to about 1 in 10 other businesses. Interestingly, about 4 in 10 restaurants disagree or strongly disagree that food trucks *compete directly for their customers*, perhaps indicating that they offer different types of food, a different atmosphere, or a different style of restaurant than what food trucks can offer.

#### Agreement about competing directly for customers, by business type\*

*Food trucks compete directly for our customers*



# Impact of food trucks on revenue

## Discourage customers

Among all businesses, slightly more than 1 in 10 agree, including 4% who strongly agree, that *crowds around food trucks discourage people from coming into their organization/business*.

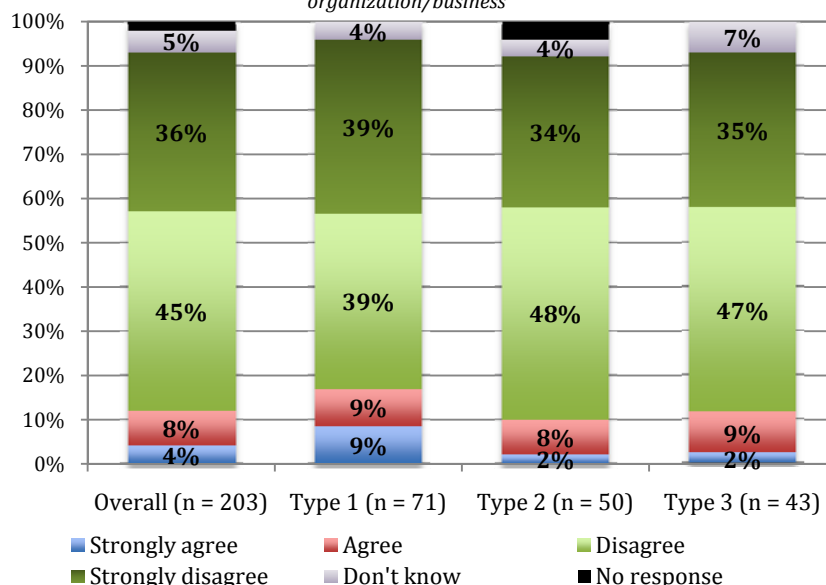
Overwhelmingly, more than 8 in 10 disagree or strongly disagree with this statement, including 36% who strongly disagree.

There is some indication that proximity to food trucks does impact ability to access the business, as about 2 in 10 Type 1 businesses agree or strongly agree compared to about 1 in 10 Type 2 or Type 3 businesses. However, these differences are not statistically significant.

Restaurants are much more likely than other businesses to agree or strongly agree that *crowds around food trucks discourage people from coming into their organization/business*. About 4 in 10 restaurants agree or strongly agree compared to 1 in 20 other businesses.

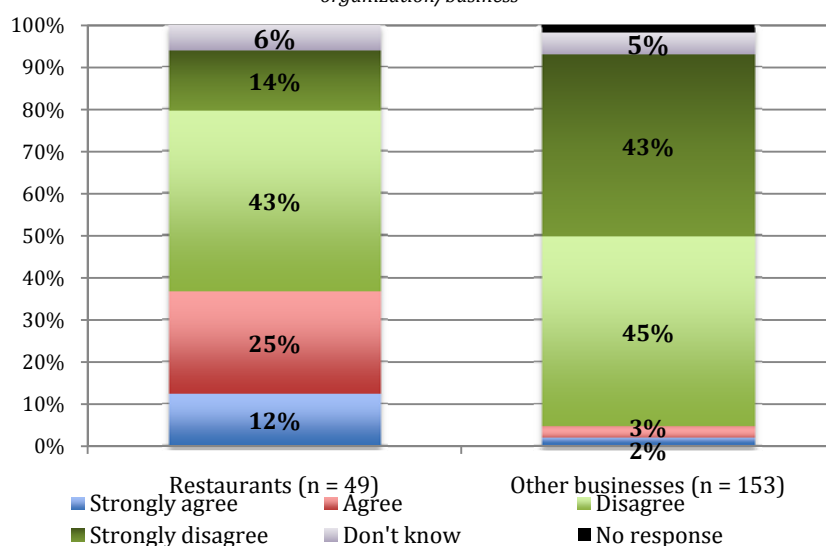
### Agreement about food truck crowds discouraging customers

*Crowds around food trucks discourage people from coming into my organization/business*



### Agreement about food truck crowds discouraging customers, by business type\*

*Crowds around food trucks discourage people from coming into my organization/business*



# Impact of food trucks on revenue

## Pedestrian traffic good for business

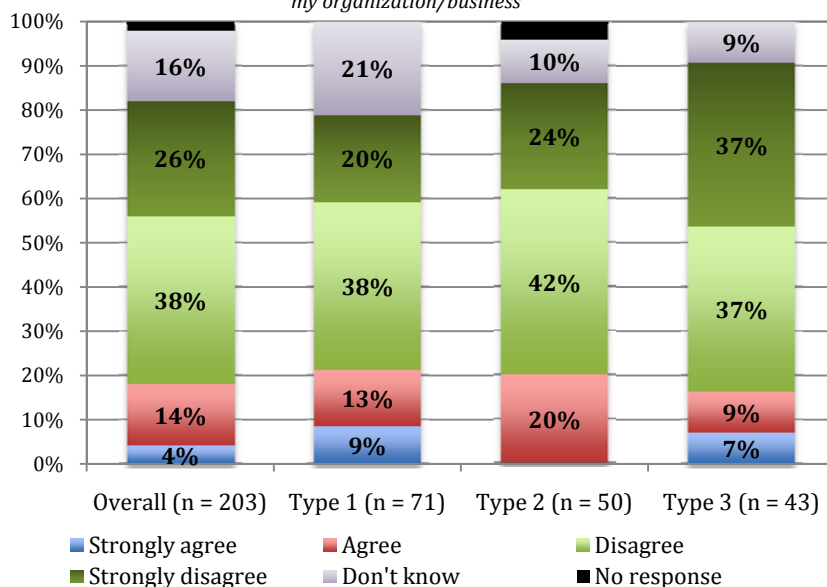
Among all businesses, almost 2 in 10 agree, including 4% who strongly agree, that *food trucks draw people onto the street and increase the number of people coming into their organization/business*. The vast majority of businesses disagree (over 6 in 10), including 26% who strongly disagree.

When examining the total proportion of agreement (agree and strongly agree), the results are virtually the same by proximity to food trucks (about 2 in 10 for each type). This seems to indicate that foot traffic reaches farther than just those businesses that are typically located next to or within a block of a food truck.

The figure to the right shows that restaurants are just as likely as other businesses to disagree or strongly disagree that *food trucks draw people onto the street and increase the number of people coming into their organization/business*. About 7 in 10 disagree or strongly disagree compared to about 6 in 10 other businesses.

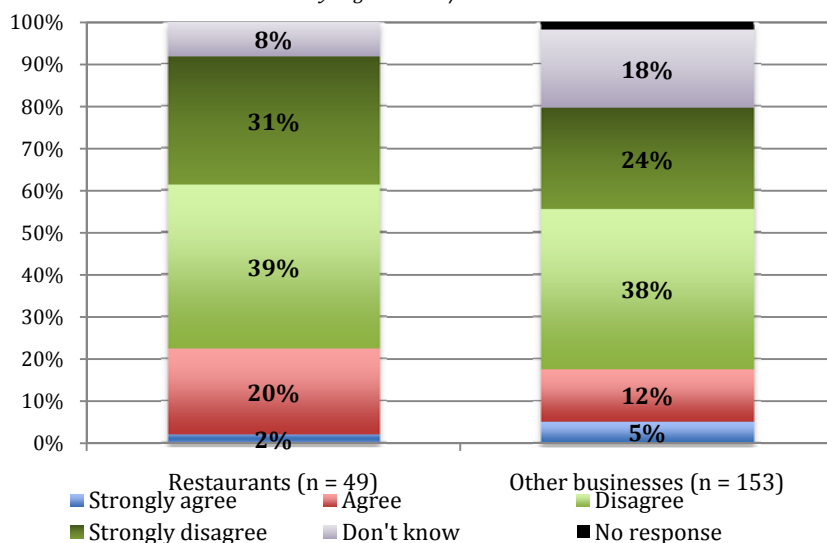
### Agreement about pedestrian traffic being good for business

*Food trucks draw people onto the street and increase the number of people coming into my organization/business*



### Agreement about pedestrian traffic being good for business, by business type

*Food trucks draw people onto the street and increase the number of people coming into my organization/business*





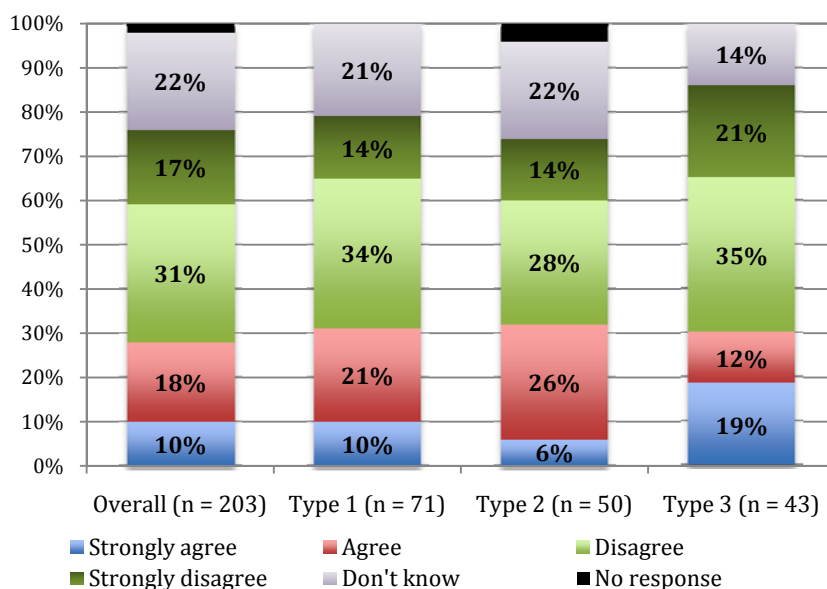
# Impact of food trucks on revenue

## Increase business traffic

Among all businesses, almost 3 in 10 agree, including 10% who strongly agree, *the more people on the street, the better it is for their organization/business*. Almost half disagree or strongly disagree with this statement, including 17% who strongly disagree. Of interest, 22% said they did not know, indicating that foot traffic may not impact their business.

### Agreement about food trucks increasing business traffic

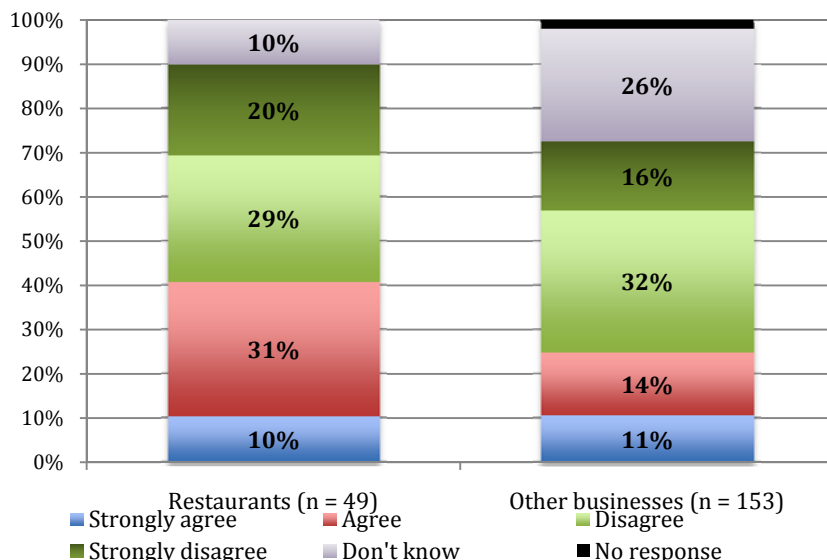
*The more people on the street, the better it is for my organization/business*



Although the difference between restaurants and other businesses falls just below the threshold for statistical significance, results show that restaurants are more likely than other businesses to agree or strongly agree that *the more people on the street, the better it is for their organization/business*. About 4 in 10 restaurants strongly agree or agree with this statement compared to about 1 in 4 for other businesses.

### Agreement about food trucks increasing business traffic, by business type

*The more people on the street, the better it is for my organization/business*

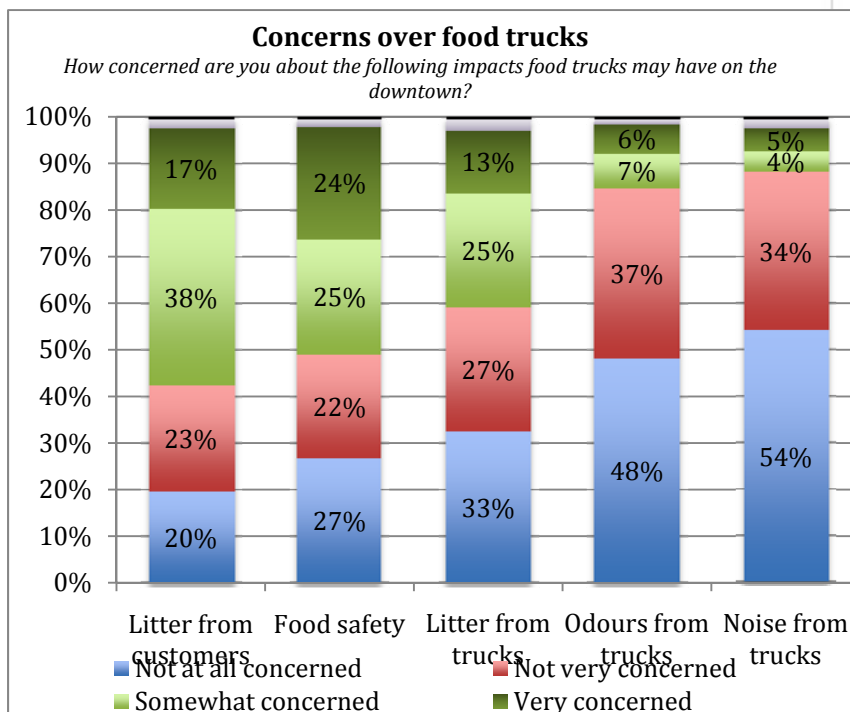


# Concerns about food trucks

## CONCERNS ABOUT FOOD TRUCKS

Among all businesses, most are concerned about *litter from customers* (over half concerned, including 17% very concerned), *food safety* (about half concerned, including 24% very concerned) and *litter from trucks* (about half concerned, including 13% very concerned).

A smaller proportion of all businesses is concerned with *odours from trucks* (just over 1 in 10 concerned, including 6% very concerned) and *noise from trucks* (less than 1 in 10 concerned, including 5% very concerned), suggesting that the behaviours surrounding food trucks are a concern while the trucks themselves are more of a nuisance.



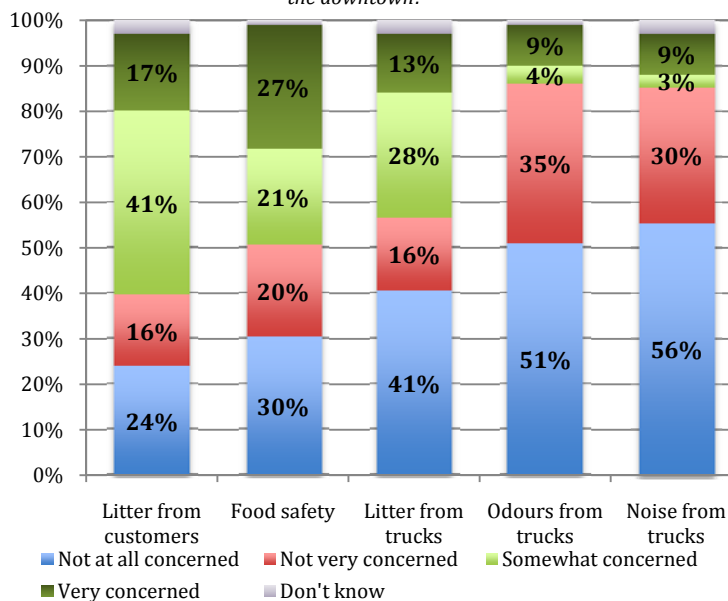
# Concerns about food trucks

## Concerns over food trucks, by business proximity

Results in the three figures show very little difference by proximity to food trucks. In fact, regardless of proximity to trucks, businesses' most pressing concerns are *litter from customers* and *food safety*. Even Type 1 businesses, who are closest to trucks, are just as concerned (or in this case unconcerned) with aspects that would be affected by proximity, such as *odours from trucks* and *noise from trucks*.

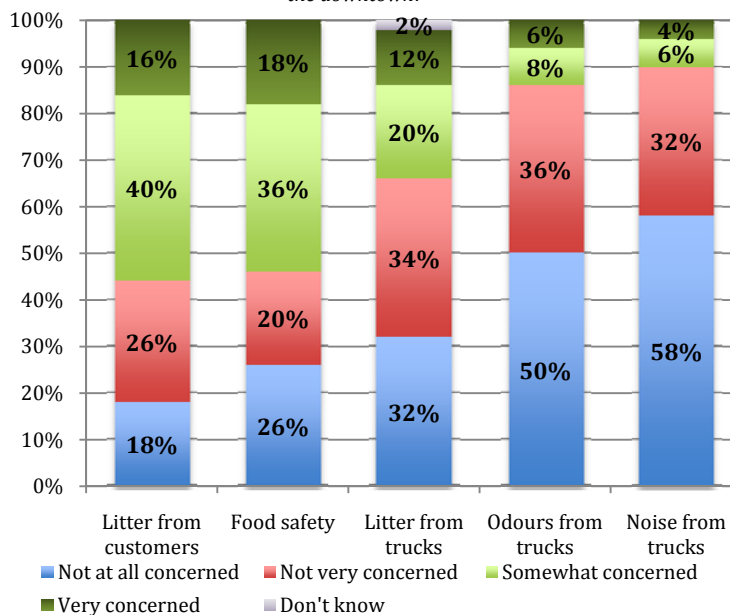
### Concerns over food trucks - Type 1

How concerned are you about the following impacts food trucks may have on the downtown?



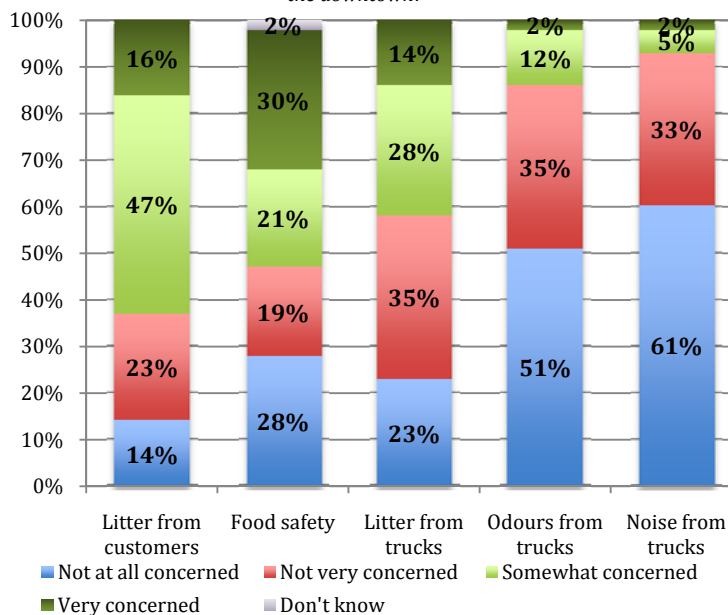
### Concerns over food trucks - Type 2

How concerned are you about the following impacts food trucks may have on the downtown?



### Concerns over food trucks - Type 3

How concerned are you about the following impacts food trucks may have on the downtown?





# Concerns about food trucks

## Concerns over food trucks, by business type

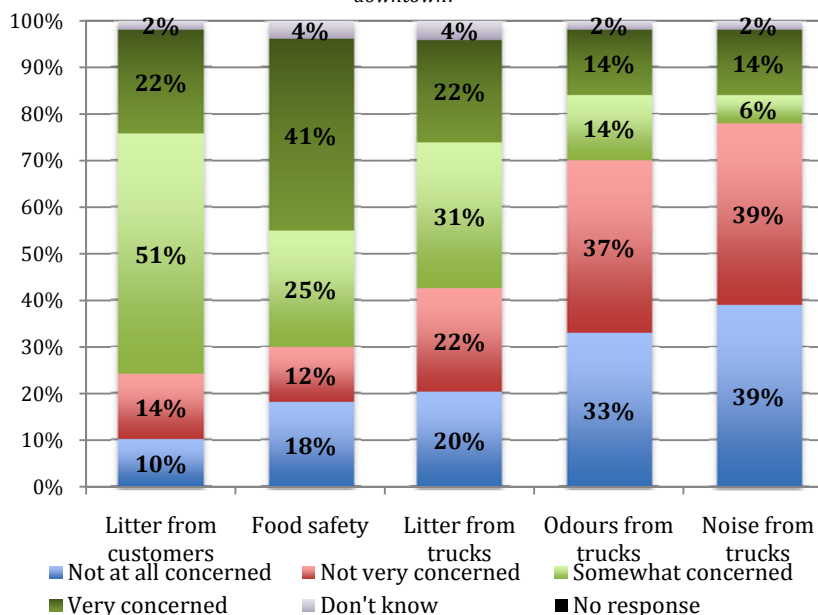
Comparing the concerns of restaurants to other businesses shows that restaurants are statistically more likely to be concerned (somewhat or very) with all aspects tested — about two to four times more likely than other businesses.

For example, more than 7 in 10 restaurants are somewhat or very concerned with *litter from customers*, while half of other businesses are concerned with this aspect.

Of interest, although restaurants are more likely than other businesses to be concerned, the ranked order of concerns (by combined somewhat and very concerned) is the same across business types. Restaurants and other businesses are most concerned with *litter from other customers* and least concerned with *noise from food trucks*.

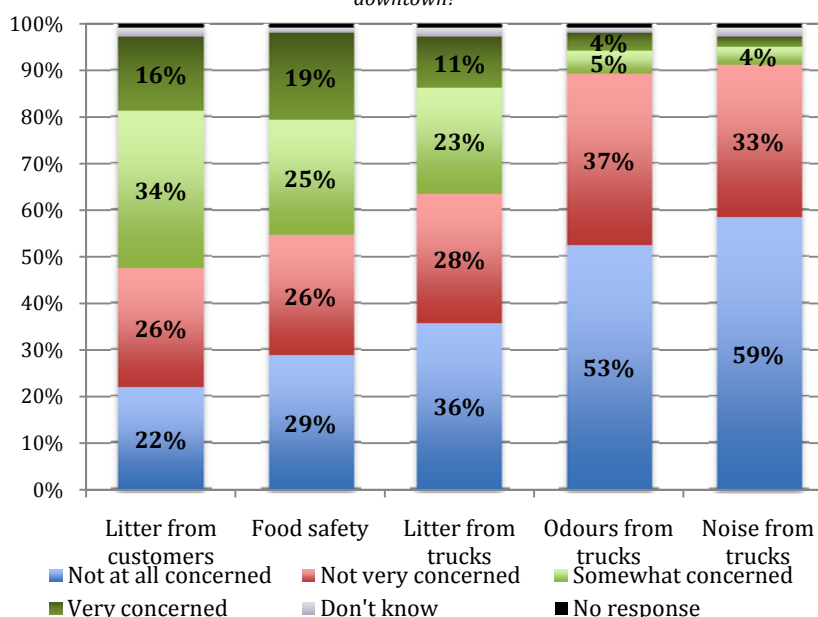
### Concerns over food trucks - Restaurants\*

How concerned are you about the following impacts food trucks may have on the downtown?



### Concerns over food trucks - Other businesses\*

How concerned are you about the following impacts food trucks may have on the downtown?



# Overall assessment of food trucks

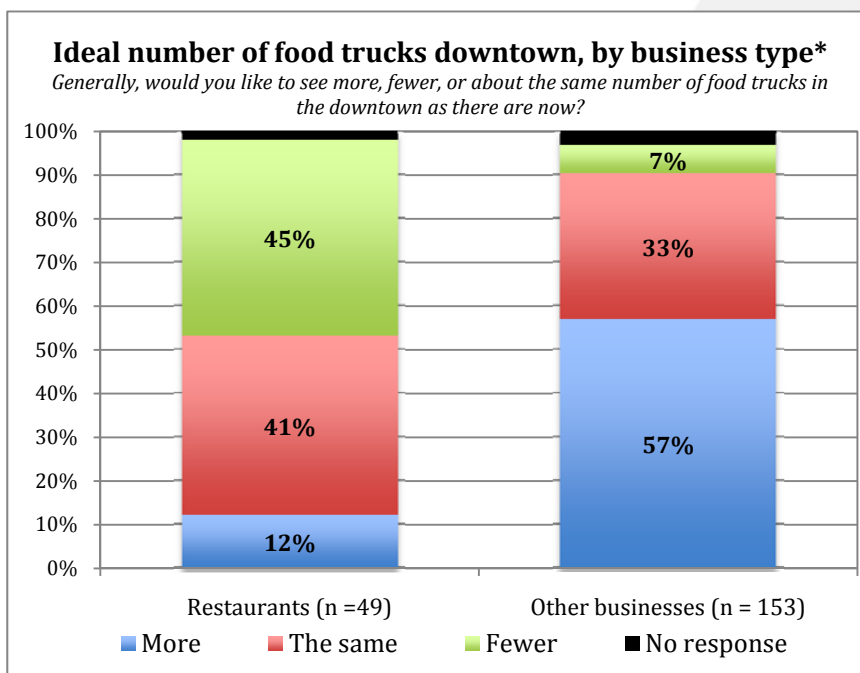
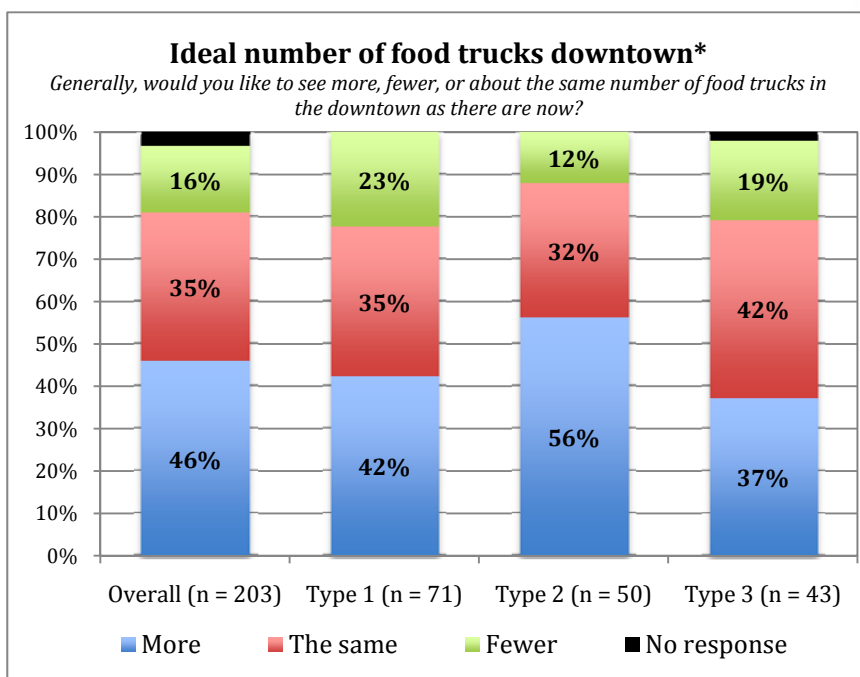
## OVERALL ASSESSMENT OF FOOD TRUCKS

### Ideal number of food trucks downtown

Overall, 46% of businesses surveyed would like to see more food trucks downtown, while 35% would like to see the number remain the same. About 16% would prefer to see fewer food trucks.

There is a statistically-significant difference by proximity to food trucks, although the difference is not consistent — that is, we do not see a consistent increase or decrease in desire for more or fewer food trucks the further a business is from where food trucks typically are. Type 1 businesses (i.e., those closest to food trucks) are most likely to want fewer trucks (23% versus 12% for Type 2 and 19% for Type 3), whereas Type 2 businesses are most likely to want more food trucks (56% for Type 2 versus 42% for Type 1 and 37% for Type 3).

As would be expected based on previous answers, restaurants (45%) are more than six times more likely than other businesses (7%) to prefer to see fewer food trucks downtown. This difference is statistically significant.



# Overall assessment of food trucks

## Recommendations

Businesses were asked what recommendations they would give to The City regarding food trucks operating downtown. Results show that overall (i.e., among all businesses), the vast majority of recommendations are ones that support food trucks, such as *allow for more food trucks* (14%), *support growth for them* (11%), or *continue as is* (5%).

In terms of The City's role, businesses mention that it may be valuable to *designate parking spots specifically for food trucks* (9%), *monitor food safety* (8%), or *limit the number of locations food trucks can park in* (7%).

Examining results by proximity shows very little difference, as most give answers in support of growing the food truck industry downtown. With restaurants, their responses differ greatly from other businesses, as they are much more likely to give recommendations that may hinder food truck growth or development, such as *limit the number of locations food trucks can park in* (24% of restaurants versus 1% of other businesses) or *designate parking for them* (12% versus 8%). Of interest, just 4% of restaurants say The City should *do away with food trucks altogether*, which indicates that although many perceive food trucks as a direct competitor, restaurants are more likely to recommend restrictions that perhaps they view as giving food trucks an unfair advantage than to do away with them altogether.

**Table 9: Recommendations**

*What recommendations, if any, would you give to The City of Calgary regarding food trucks operating downtown?*

	Overall (n = 203)	Type 1 (n = 71)	Type 2 (n = 50)	Type 1 (n = 43)	Restaurants (n = 49)	Other businesses (n = 153)
More food trucks	14%	20%	14%	9%	4%	18%
Support their growth	11%	16%	8%	12%	2%	14%
Designate parking for them	9%	13%	12%	5%	12%	8%
Monitor food safety	8%	9%	6%	9%	8%	8%
Limit number of locations	7%	7%	8%	9%	24%	1%
Continue as is	5%	6%	2%	7%	-	7%
More advertising/marketing	4%	1%	8%	2%	-	5%
Do not allow truck to monopolize one spot	3%	3%	4%	2%	-	5%
Monitor adherence to bylaws	3%	1%	2%	7%	6%	2%
Ensure there are garbage and recycling bins available	2%	4%	-	2%	-	3%
Monitor competitive pricing	2%	3%	-	2%	4%	1%
Remove trucks	1%	3%	-	2%	4%	1%
Collect business tax / pay rent	1%	1%	2%	2%	2%	1%
Other	2%	3%	-	5%	2%	2%
No recommendations	15%	10%	22%	21%	20%	14%
No response	30%	25%	30%	21%	29%	31%

Note: Businesses could provide more than one response; therefore, columns will sum to more than 100%.



# Key findings

## KEY FINDINGS

This section of the report summarizes the key findings from the research, relating them back to the main objectives for this research.

- **Parking.** Generally, businesses feel that food trucks have some impact on the availability of parking downtown, although the impacts are typically perceived as being fairly minimal. Although almost no businesses think that food trucks have a positive impact on parking, about 1 in 10 businesses think food trucks make it much more difficult for people to find parking, while the majority (53%) think they have no impact on parking at all.
- **Increased traffic.** Most businesses say that food trucks increase foot traffic downtown, either by getting their employees outside to purchase from them or by bringing people downtown to eat at them.
- **Concerns with food trucks.** Overall, businesses have few concerns with food trucks, although at the top of their list is litter from customers and food safety. There is very little concern with noise or odours from trucks or the increased foot traffic they may bring, even from those businesses that are closest to where food trucks typically park.
- **Competition and local vitality.** Most businesses (even non-restaurants) agree that food trucks are competition for restaurants, but many businesses say that food trucks get employees outdoors at lunch when they may not otherwise have left their building. In addition, many also say that employees are not always substituting meals they would have purchased from restaurants for food trucks, but are making additional purchases they would not otherwise have made. In addition, many businesses see positive impacts from food trucks on increasing the vibrancy of downtown and also attracting more customers downtown, which they say sometimes leads to increased business. Businesses other than restaurants mostly see food trucks as a welcome addition to the downtown, and, in fact, many tend to welcome an increase in the number of food trucks downtown.
- **Restaurants.** Because food trucks are direct competitors for brick-and-mortar restaurants, it is not surprising that restaurants report being most negatively impacted by food trucks' presence downtown. Many believe that food trucks have a negative impact on their business, either by directly taking customers away or by food trucks blocking the frontage of their businesses, thus making it more difficult for people to see them. In fact, 53% of restaurants say that food trucks have had a negative impact on their finances. Of interest, part of the financial impact that restaurants may suffer may be from their own staff purchasing meals from food trucks rather than their business. Almost half of restaurants indicate that their staff are less likely to eat at restaurants when food trucks are nearby, which is higher than the proportion of other businesses that report the same (about 4 in 10).

## Key findings

Although restaurants may be affected financially by food trucks, they generally have a much more negative view of food trucks and their impact than other businesses. For instance, restaurants are much less likely than other businesses to say that food trucks add to the vibrancy of downtown or increase foot traffic downtown.

However, there is a lot of information from restaurants to indicate that the perceived negative impact on their business may, overall, decrease their perceptions of the positive impact food trucks may have. For instance, restaurants are less likely than other businesses to report that food trucks do increase foot traffic downtown or bring people downtown, yet they are more likely than other businesses to say that there is more congestion on sidewalks because of food truck patrons and food trucks have a great negative impact on parking. This seems to be counterintuitive. Another example is half of restaurants say their own employees are more likely to go out to eat when there are food trucks (which is higher than other businesses), yet they are less likely than other businesses to say there is an increase in people out on the streets because of food trucks.

In spite of restaurants' generally negative views on the impact food trucks have, just 4% recommend that The City should *do away with food trucks altogether*, which indicates that although many perceive food trucks as a direct competitor and potentially having negative impacts on their business, restaurants are more likely to recommend The City put restrictions in place (e.g., designated parking spots) rather than eliminating food trucks altogether.

# Appendix A Letter and Questionnaire

## Appendix A Letter and Questionnaire



«ID»

### RE: The City of Calgary Animal & Bylaw Services Food Truck Impact Survey

The City of Calgary Animal & Bylaw Services would like your feedback regarding the impact food trucks have on downtown businesses/organizations such as yours.

The City would like to receive feedback from as many downtown businesses as possible, and we hope you take 5 to 10 minutes to complete the survey. The survey is intended for someone in your business/organization who would be able to assess the impact food trucks may have on your organization, its employees, its customers/clients, and the downtown area in general.

There are two ways you can complete the survey.

- ▶ **By mail.** Please complete the attached survey and return it in the attached postage-paid envelope.
- ▶ **Online.** You can complete the survey by typing the website [www.pra.ca/en/foodtrucks](http://www.pra.ca/en/foodtrucks) into the address bar of your browser. Once at the website, please click the link and enter your unique code, which is «**CODE**».

To maintain confidentiality, The City has engaged PRA Inc. PRA will be responsible for keeping the information you provide in strict confidence, and all information will be reported in aggregate (group) form only.

The personal information on this form is collected under the authority of the *Freedom of Information and Protection of Privacy Act*, Section 33(c) and will be used to identify ways to improve bylaws for food trucks. If you have questions about the collection/use of this information, please contact Kent Pallister at [Kent.Pallister@calgary.ca](mailto:Kent.Pallister@calgary.ca).

If you have any issues with or questions about the survey process, please contact Nicholas Borodenko of PRA Inc. at [borodenko@pra.ca](mailto:borodenko@pra.ca) or at 1-888-877-6744.

Thank you in advance for your participation in this important research.

Kent Pallister  
Chief Licence Inspector, Compliance Services  
Animal & Bylaw Services





# The City of Calgary

## Food Truck Impact Survey

The City of Calgary would like to understand the impact that food trucks are having on businesses operating in downtown Calgary.

Please take a few minutes to complete this survey about your organization's experience with food trucks either by completing this paper survey or going online at [www.pra.ca/en/foodtrucks](http://www.pra.ca/en/foodtrucks).

**By food trucks, we mean trucks selling food from vendor trucks parked on the street. These DO NOT include food carts (on the sidewalk) or food vendors in Stephen Avenue Mall.**

1. Typically, where is the closest food truck located relative to your organization?

- O<sub>1</sub> In front of this building      O<sub>2</sub> On this block, but not directly in front of this building      O<sub>3</sub> Within a block  
O<sub>4</sub> Two blocks or more away      O<sub>8</sub> Don't know

### IMPACT ON THE AREA

2. Generally, would you like to see more, fewer, or about the same number of food trucks in the downtown as there are now?

- O<sub>1</sub> Fewer      O<sub>2</sub> About the same number      O<sub>3</sub> More

Below are a series of statements about food trucks. Please indicate your level of agreement with each.

Food trucks...	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
3. add to the vibrancy of downtown .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
4. encourage people to get out on the street during lunch hour.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
5. encourage people to come downtown.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
6. make the area less inviting .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
7. are unfair competition for restaurants in my area .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
8. increase the congestion on the sidewalks, making it more difficult to walk around the downtown.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

9. In your opinion, what effect do food trucks have on parking in downtown Calgary? Does it make finding parking on the street...

Much easier	Easier	About the same	More difficult	Much more difficult	Don't know
O <sub>5</sub>	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

How concerned are you about the following impacts food trucks may have on downtown?

	Very concerned	Somewhat concerned	Not very concerned	Not at all concerned	Don't know
10. Noise from food trucks.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
11. Odours from food trucks .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
12. Litter from food trucks .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
13. Litter from customers using food trucks.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
14. Food safety .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

## IMPACTS ON YOUR EMPLOYEES AND WORKPLACE

15. Generally, do you think food trucks in and around the area have a positive, a negative, or no real impact on you and your organization's employees at this location?

O<sub>3</sub> Positive impact    O<sub>2</sub> No real impact (**GO TO Q17**)    O<sub>1</sub> Negative impact    O<sub>8</sub> Don't know (**GO TO Q17**)

16. In your own words, please explain the types of positive and/or negative impacts food trucks have had on you and your employees.

---



---



---

Below is a series of statements about food trucks and their impact on you and employees at this location. Please indicate your level of agreement with each.

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
17. Food trucks provide employees with more options of where to eat .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
18. Employees are more likely to go out to eat when there are food trucks nearby .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
19. Food trucks encourage employees to socialize more often at lunch. ....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
20. Food trucks make getting food more convenient .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
21. Staff are less likely to eat at restaurants when food trucks are nearby .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

## IMPACTS ON YOUR CUSTOMERS OR CLIENTS

22. Generally, do you think food trucks in and around downtown have a positive, negative, or no real impact on your customers or clients?

O<sub>3</sub> Positive impact    O<sub>2</sub> No real impact (**GO TO Q24**)    O<sub>1</sub> Negative impact    O<sub>8</sub> Don't know (**GO TO Q24**)

23. In your own words, please explain the type of positive and/or negative impacts food trucks have had on your customers or clients.

---



---



---

Below are a series of statements about food trucks and their impact on customers and clients who visit your organization at this location. Please indicate your level of agreement with each.

Food trucks...	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
24. provide our customers/clients with greater options as to where to eat.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
25. are disruptive, creating crowds that make it more difficult for our clients to get to us .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
26. make it more difficult for our customers/clients to find parking. ....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
27. make our customers/clients less likely to visit/use our business.....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

## FINANCIAL IMPACT ON YOUR BUSINESS

28. Generally, do you think food trucks in and around downtown have a positive, a negative, or no real financial impact on your organization?

O<sub>3</sub> Positive impact      O<sub>2</sub> No impact (**GO TO Q30**)      O<sub>1</sub> Negative impact      O<sub>8</sub> Don't know (**GO TO Q30**)

29. In your own words, please explain the type of positive and/or negative impacts food trucks have had on the finances of your business.

---



---



---

30. Do you attribute any increase or decrease in revenue in your organization to the presence of food trucks in the area?

O<sub>3</sub> Revenue increase      O<sub>2</sub> Revenue decrease      O<sub>1</sub> No impact on revenue (**GO TO Q32**)      O<sub>8</sub> Don't know (**GO TO Q32**)

31. What percentage decrease/increase in sales at this location do you attribute to the presence of food trucks?

O<sub>1</sub> Less than 2%      O<sub>2</sub> 3% to 5%      O<sub>3</sub> 6% to 10%      O<sub>4</sub> 11% to 15%      O<sub>5</sub> 16% to 20%      O<sub>6</sub> Over 20%      O<sub>8</sub> Don't know

Please indicate your level of agreement with each of these statements as they apply to the impact of the food trucks on your organization.

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
32. Food trucks compete directly for our customers .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
33. Food trucks draw people onto the street and increase the number of people coming into my organization/business .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
34. Crowds around food trucks discourage people from coming into my organization/business .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>
35. The more people on the street the better it is for my organization/business .....	O <sub>4</sub>	O <sub>3</sub>	O <sub>2</sub>	O <sub>1</sub>	O <sub>8</sub>

## RECOMMENDATIONS

36. What recommendations, if any, would you give to The City of Calgary regarding food trucks operating downtown?

---



---



---

## BACKGROUND

37. How many restaurants and other food service outlets (not including food trucks) are within one block of your location?

O<sub>0</sub> None      O<sub>1</sub> One      O<sub>2</sub> 2 or 3      O<sub>3</sub> 4 or 5      O<sub>4</sub> 6 to 10      O<sub>5</sub> Over 10      O<sub>8</sub> Don't know

38. Which of the following best describes your organization/business at this location?

O<sub>1</sub> Professional office      O<sub>2</sub> Construction      O<sub>3</sub> Consumer services      O<sub>4</sub> Restaurant/food services  
O<sub>5</sub> Retail      O<sub>66</sub> Other (Specify) \_\_\_\_\_

39. Approximately how many people work in your organization/business at this location?

Full time \_\_\_\_\_ Part time \_\_\_\_\_

**Please return the completed survey in the envelope provided to:**

**PRA Inc.  
500-363 Broadway  
Winnipeg, MB R3C 3N9**