



Goods Movement Strategy

Engagement and communications summary report

November 12, 2018

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Introduction

Study background

The movement and transportation of goods is important, and closely tied, to the development and economy of Calgary. Calgary is well positioned as an inland port to connect to local, national and international markets through the movement of goods into, out of and throughout Calgary. Calgary has major rail lines (Canadian Pacific and Canadian National), a large international airport (YYC), and highways that connect to interprovincial (Trans Canada Highway) and international highways (CANAMEX corridor).

The Goods Movement Strategy (GMS) will allow The City to support the goods movement industry and citizens of Calgary through continued improvements to the Transportation Network that allows for the efficient movement of goods to markets in Calgary and beyond. The GMS will allow Council and Administration to make informed decisions on projects and initiatives to support the growth of goods movement in Calgary, which support Calgary's continued role as a leader in the multi-modal transportation of goods.

Phase	Engagement Activity	Date	Participants
1	Advisory group sessions	April 25 – 26 and May 2, 2017	Approximately 35
	One-on-one interviews	May 1 – June 30, 2017	10 public and private sector organizations
	Small business survey	May 15 – June 30, 2017	Approximately 20 responses
2	Advisory group sessions	July 25 - 27, 2017	Approximately 25
3	Advisory group sessions	October 24 - 25, 2017	Approximately 25
	Focus groups	November 29 and December 12, 2017	Approximately 45
4	Advisory group sessions	May 1 - 2, 2018	Approximately 20
	Open houses	February 3, 4, 10 and 11, 2018	Approximately 125
	Online survey	February 2 - 16, 2018	Approximately 150
	Symposium	June 12, 2018	Approximately 35
5	Advisory group Information sessions	September 12 - 13, 2018	Approximately 25

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Engagement strategy

The engagement approach was multi-faceted, involving both online and face-to-face components. It was important to work directly with industry stakeholders to understand their needs specifically, as their businesses will be impacted by the recommendations proposed in the strategy. Calgarians were consulted at a key milestone in the project rather than throughout the project, as it is anticipated that any improvements made would benefit them as well.

Key industry stakeholders were identified, and provided valuable input that helped the project team understand operational and strategic issues and challenges, and how to address them in the long- and short-term. This was done through face-to-face consultation with stakeholders, and where appropriate augmented with online surveys.

Engagement with Calgarians took place in the form of face-to-face events and an online survey.

Engagement activities

The engagement activities with key industry stakeholders consisted of three advisory groups that started in early 2017 and met every quarter until Q3 2018.



The engagement activities for Calgarians consisted of three face-to-face sessions and an online survey. This took place in Q1 2018.

Focus group sessions were held in Q4 2017, to capture feedback from the broader goods movement industry and academia.

In Q2 2017, a lunch and learn event was held for the the Councillors, their staff and The Mayor's Office. This event was an opportunity to introduce the project to them and gather their feedback on the project.

Stakeholders

Public engagement events were promoted to all Calgarians through various communication strategies and tactics, described in more detail below.

For targeted engagement activities with the goods movement industry, stakeholders from the following groups were invited to participate:

- Public sector agencies (Alberta Transportation, Transport Canada)
- Neighbouring jurisdictions (Airdrie, Chestemere, Rocky View County, MD of Foothills, High River, Cochrane, Okotoks)
- Calgary Airport Authority
- Railway companies (CN and CP)
- Calgary Police Service – truck unit
- Industry organizations and associations, such as the Calgary Logistics Council, Alberta Motor Transport Association and the Van Horne Institute
- Economic development organizations, such as Calgary Economic Development, Calgary Chamber of Commerce and the Calgary Regional Partnership
- Logistics, shipping and freight companies
- Warehousing companies
- Carriers, such as trucking companies, couriers and food delivery companies
- Academic institutions, such as the University of Calgary and Mount Royal University

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Advisory groups

Operational Advisory Group

The Operational Advisory Group focused on operational challenges that they face with Calgary's goods movement network and looked at short-term actions and practices that can support goods movement in Calgary. The focus was specifically on Calgary's Transportation Network and its impacts on goods movement in the city.

Stakeholders from the following groups were invited to participate in this advisory group:

- Calgary Logistics Council
- Bison Transport
- Van Horne Institute
- Shoppers Drug Mart
- FedEx
- Volker Stevin
- The Checker Group
- Alberta Motor Transport Association
- Sobeys

Strategic advisory group

The Strategic Advisory Group looked at long-term strategies, policies and infrastructure needs that would improve goods movement in Calgary. They were also tasked with helping the project team better understand what changes in technology and industry we should anticipate in the future, and how to be flexible in accommodating those changes within existing City policies and procedures.

Stakeholders from the following groups were invited to participate in this advisory group:

- Calgary Economic Development
- Alberta Transportation
- Calgary Regional Partnership
- BOMA
- Van Horne Institute
- Calgary Airport Authority
- Mount Royal University

Regional Advisory Group

The Regional Advisory Group focused on the impacts of goods movement on the Transportation Network in Calgary and the region. They looked at where goods movement generators are within the region that impact Calgary, and how Calgary's Transportation Network is connected to the region.

Stakeholders from the following jurisdictions were invited to participate in this advisory group:

- Airdrie
- Chestemere
- Rocky View County
- MD of Foothills
- High River
- Cochrane
- Okotoks

Focus groups

The main purpose of the Focus Groups was to discuss potential future scenarios on a broad scale with a larger group of stakeholders. Specifically, they looked at what technology and industry changes will be coming, and how The City can be flexible in accommodating them within City policies and procedures.



Stakeholders from the following groups were invited to participate:

- Academia: Mount Royal University, University of Calgary
- Aggregate companies
- Industrial real estate agents

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- Logistics consultants
- Courier companies

Phase 1: Identify the state of goods movement in Calgary

Overview

Phase One of engagement consisted of many tactics. These tactics included advisory group meetings, one-on-one interviews and a small business survey.

It began with introductory meetings for the advisory groups. To keep the advisory groups to a manageable size, it was determined that one-on-one interviews would be beneficial. Industry stakeholders, infrastructure owners, and public-sector agencies that were not part of our advisory groups were asked to participate in these interviews.

An online survey for small and mid-size businesses was also conducted during this phase, to help the project team better understand the needs of businesses that are impacted by goods movement but not part of the goods movement industry.

The meetings, interviews and surveys yielded valuable information about current conditions, challenges and opportunities regarding goods movement in Calgary.

Engagement activities – what we asked

We asked our **operational advisory group** the following questions:

- What do you see as the key goods movement issues and trends today?
- Where do you see your industry or field headed in the short-term and in the long-term? What trends will impact your industry/field, and how will these impact goods movement?
- What should the Goods Movement Strategy (GMS) be looking at? Which are the most important issues?

We asked our **strategic advisory group** the following questions:

- What do you see as the (social, political, economic, technological or other) drivers that could affect goods movement in the long-term?
- What do you anticipate could be the potential outcomes from these drivers, and what would be the implications for your industry should they arise (desirable or undesirable)?
- Given this, what strategies should the GMS look at to enable desirable outcomes, combat undesirable outcomes, or to be flexible in responding to the range of outcomes?

The project consultants conducted the one-on-one interviews. These interviews helped us determine what experiences, needs and ideas stakeholders have so that research on these topics could be conducted. A copy of the interview questionnaire can be found in Appendix 1.

The small business survey asked participants about how they ship and receive goods, what issues related to goods movement are most important to them and what type of business they operate. A copy of the small business survey can be found in Appendix 2.

What we heard

There were three main themes that came out of the first phase of advisory groups: planning and coordination with other regions/partners, maintaining accessibility, and being prepared for emerging trends. More in-depth analysis of the verbatim revealed many sub-themes which were dominated by issues surrounding current infrastructure, flexibility, updating policies and bylaws, and land uses.

How we used the input

We used the input received from our advisory groups to determine what information would be needed to help participants effectively participate in our Phase Two sessions. We used the input to

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identify where there were gaps in the information that was provided for these initial sessions, and how to bring all advisory group members into the discussions in subsequent meetings.

The input collected in the one-on-one interviews helped the technical consultants identify what experiences, needs and ideas needed to be researched further.

The input received from the small business survey helped us determine the impacts of goods movement on small businesses in Calgary, and what required further research.

The project team used the input from all these sources to inform the technical analysis of the performance and characteristics of the transportation network. The analysis was done using GPS truck trip traces to describe truck movements, delays, speeds and service levels within Calgary.

The input was also used to analyze and elaborate the issues during the Phase Two, where potential resolutions were identified. The analysis was done through a survey of other jurisdictions and a review of best practices.

The definition of the challenges also informed the design of a detailed survey of truck drivers who were travelling to, from and through Calgary. The purpose of the survey was to gain a better understanding of the characteristics of these external trips – notably, trip origin, trip destination and type of load carried.

Key outcomes

The key outcomes of Phase One included:

- The advisory groups met for the first time, learned about the project, provided initial feedback to shape future engagement conversations.
- The project team established relationships with stakeholders within the advisory groups, as well as those that participated in one-on-one interviews.

- The project team conducted a series of one-on-one interviews with key stakeholders. Through the interviews they learned about the goods movement characteristics and activities of varying private-and public-sector organizations and about the specific issues and challenges they face.
- The project team categorized and detailed the challenges and went on to conduct research to corroborate the challenges based on an analysis of the performance of the transportation network. This informed the next phase of engagement.

Lessons learned

The project team learned several valuable lessons during this phase of engagement.

Industry and regional stakeholders were very interested in the project and open to sharing relevant information with the project team. They were keen to take advantage of this opportunity to work with The City on identifying challenges and creating solutions together. They encouraged us to continue this dialogue and partnership even after the project ends.

A better balance was needed between the length of presentations and group discussions. Too much time was taking up by the presentation, leaving participants with insufficient time to discuss all the information and provide us with as much information as we were hoping to get during these sessions. Encouraging participants to read the materials sent in advance of the next session would reduce the amount of presentation time and allow for more time to discuss the materials at subsequent meetings.

We should not rely on external organizations to push out our request for participation in a survey. Rather than do our own communications push on the small business survey we relied on a stakeholder organization to share information about it in their weekly email blast. We did not have control over where our content was included and it was placed near the bottom of the email,

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where very few readers might have seen it. There was very low participation in that survey. The organization included it in a second weekly email, but the participation result was the same. Participation in the survey was so low that the results were not able to be used in any meaningful way by the project team. In the future, it is recommended that either paid advertising is used to reach out to businesses in Calgary directly or a formal survey of local businesses is conducted to gather the information.

Phase 2: Issues and challenges

Overview

Phase Two of engagement for the Goods Movement Strategy included a second round of advisory group meetings. The discussions focused on a report back of the issues and challenges heard at the previous advisory group meetings and how they could be resolved. Advisory group members were given a pre-read handout that outlined the issues and challenges, and asked to come prepared to suggest and discuss potential solutions. Pre-read and presentation materials were tailored for each advisory group.

Engagement activities – what we asked

We presented back to the groups what we heard in Phase One and asked them for their feedback on what we heard.

We asked the operational and strategic advisory groups the following questions for discussion:

- 1) Have we defined the issues correctly?
Anything to refine or clarify?
- 2) Are we missing anything? Is there anything to add?
- 3) Any other comments or questions on the issues or themes?

What we heard

The operational advisory group discussions focused on how goods flow through Calgary, how

infrastructure changes can alleviate bottlenecks and that improvement of data sharing between industry and The City is necessary.

The strategic advisory group discussions focused on future planning, land use, zoning and policies that are flexible enough to manage today's needs but also look to the future needs for goods movement.

Our discussions with regional partners and those in the aggregate industries focused on consistent routes for goods, appropriate infrastructure for moving goods and collaboration around future developments.

How we used the input

The input from these advisory groups was used to refine and categorize the issues. Once this work was done, research into how to address the issues and challenges was conducted.

The research had two elements. One was a series of in-depth interviews with nine other peer municipalities in Canada and the United States. The interviews examined how these municipalities addressed the identified issues. The second element was a survey of international best practices, which looked at solutions implemented by both the public and private sectors.

Key outcomes

The key outcomes of Phase Two included:

- Advisory groups met for a second time.
- The project team learned more about some of the initial topics they began researching after Phase One, and developed a deeper understanding of the challenges faced by stakeholders.

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- The project team gained an understanding of challenges faced by stakeholders on specific roads, highways and intersections in and around Calgary. The project team then used this understanding to identify potential infrastructure and operational improvements and to assess their economic and other benefits.
- The project team used the findings to fill in gaps in the range and definition of the identified issues as the basis for the jurisdictional surveys and best practice review.

Lessons learned

The project team learned that due to the imbalance from Phase One with presenting information versus gathering information, information from Phase One needed to be revisited. This assisted in collecting additional information that was required. There were several stakeholders who expressed concern that we were covering the same information and needed assurances that this project was moving forward and that their time and feedback was being recognized. As a result, we changed how the advisory groups were utilized in Phase Three and were more focused on ensuring that repeating information was kept to a minimum.

Phase 3: Opportunities

Overview

This phase included three advisory groups, two focus groups and face-to-face and online public engagement.

During Phase Three, face-to-face and online engagement opportunities were held from February 2-16, 2018. Public events were held on February 3 at Sunridge Mall, February 4 at the Quarry Park Library, February 10 at Cross Iron Mills and February 11 at the Crowfoot Library. Participants at the face-to-face sessions were asked to fill out the online survey on iPads, to ensure that participants answered the same questions. All participants were given the

opportunity to provide additional feedback on goods movement within Calgary. An education campaign to help residents learn more about goods movement, the industry and its importance to Calgary's economy supported the public engagement.



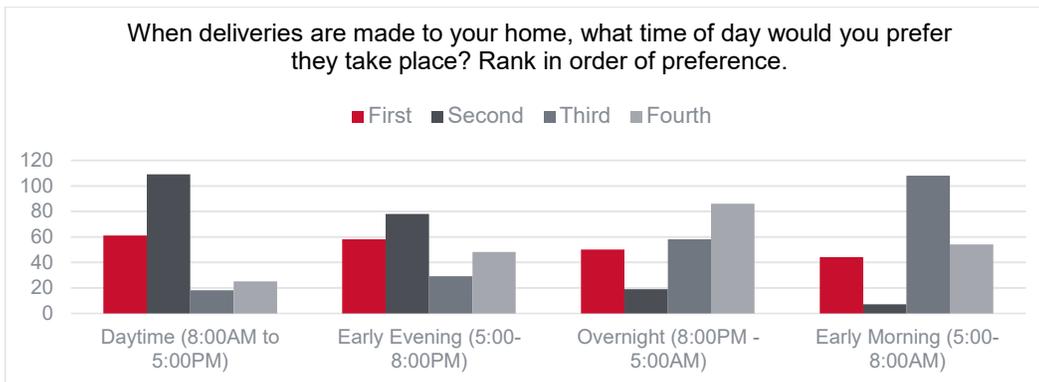
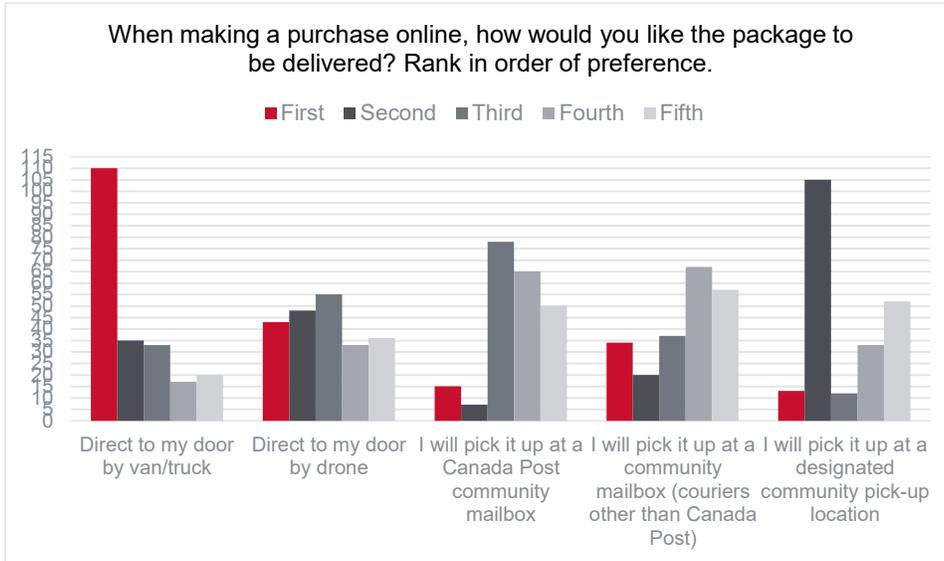
The Operational Advisory group was tasked in this phase to look at the transportation network as it applies to Calgary. This group was then asked to look at each quadrant of Calgary, as well as the downtown core, and outline where they felt improvements could be made to improve or enhance the network. The Strategic Advisory group was asked to look at long range improvements or changes that could be made to ensure the transportation network would be able to either meet, or be altered to meet future demands. It was out of this discussion that the formation of the focus groups was created. The Regional Advisory group was asked to provide the project team with updates and list out projects that they currently had on the books so that we can work more effectively to tie their work into the comments made by the Operational Advisory group.

Two focus groups were commissioned for this phase of engagement. They were comprised of academics and professionals from transportation, logistics and courier companies, who were not already in our advisory groups. These sessions were added in response to feedback received during the strategic advisory group meeting.

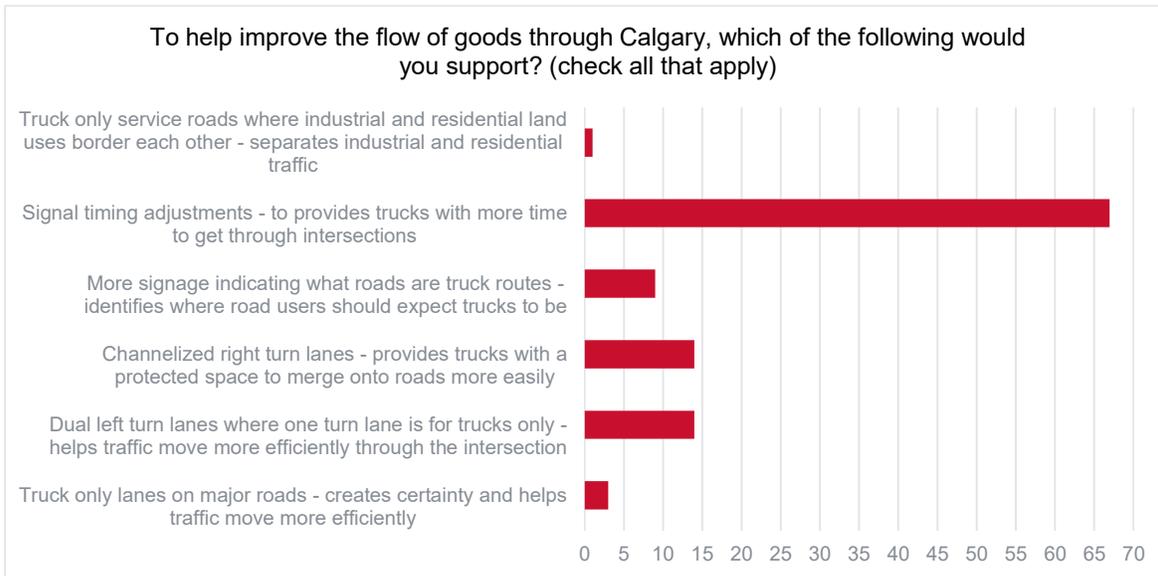
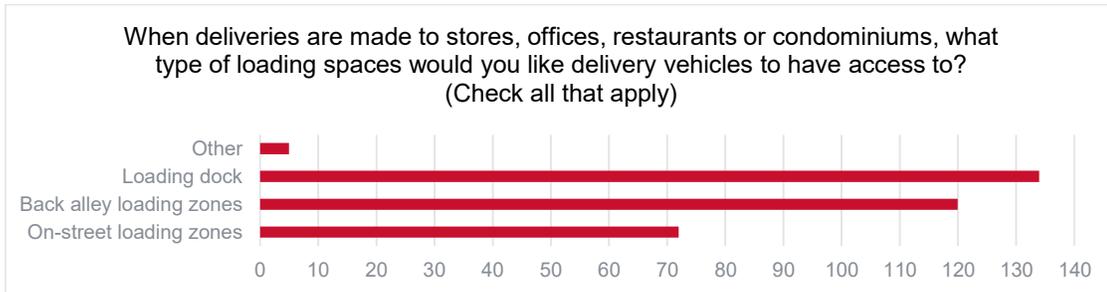
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Engagement activities – what we asked

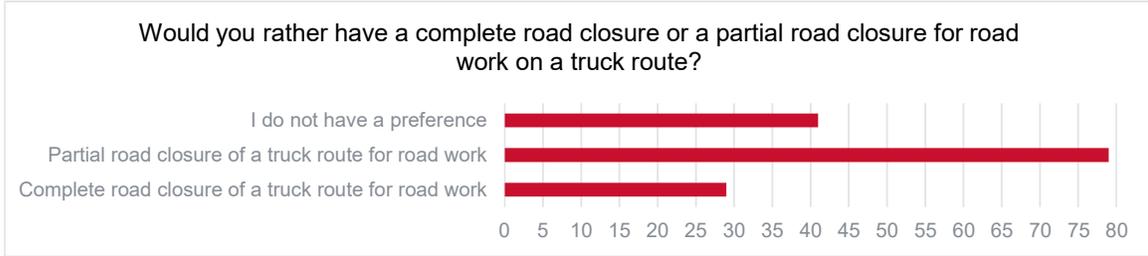
The public were asked:



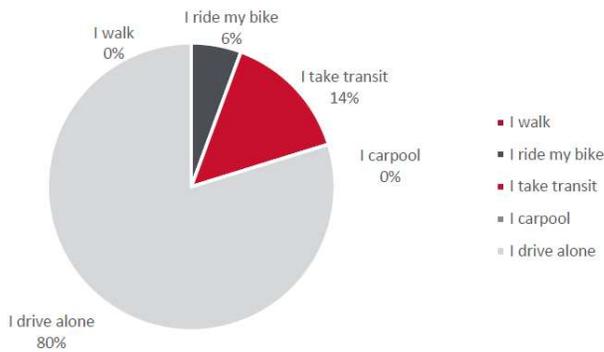
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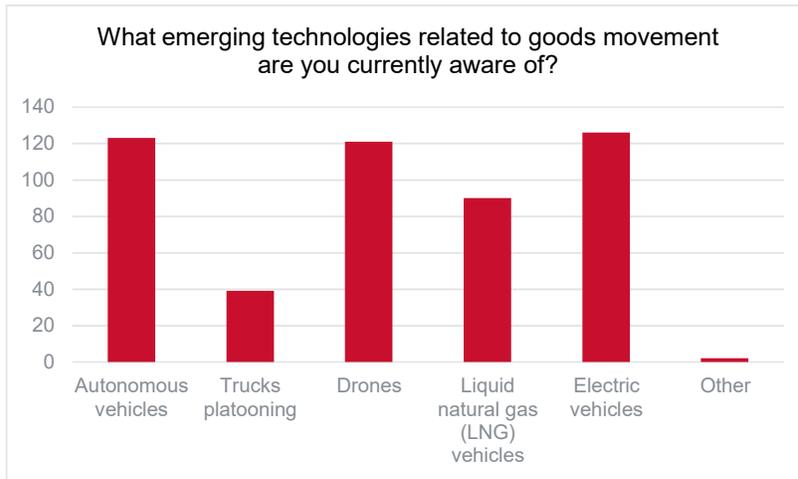
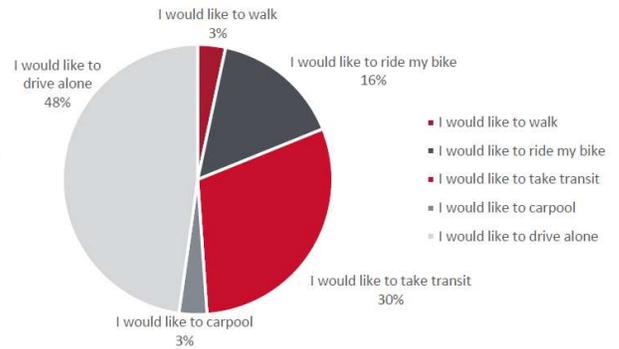
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If you work in an industrial park inside Calgary, how do you currently get to work?



If you work in an industrial park inside Calgary, how would you like to get to work?



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The Operational and Regional Advisory groups were asked to outline specific areas within the City and the Region to look at where the network was not as functional and what they felt were the opportunities to make improvements. The Strategic Advisory group was asked to look at the current transportation network to help envision what could be done now to provide flexibility when dealing with new technologies, such as autonomous vehicles, drones and other types of technological enhancements that may not have been discovered yet.

The focus groups were asked to consider the future around trends (autonomous vehicles) and how they could impact goods movement in the Calgary region. We also asked them to look at what we had learned so far and was there anything that we missed during our advisory group discussions.

What we heard

Our public engagement indicated that many respondents still want their goods delivered directly to their homes. They also preferred daytime deliveries, although there was some flexibility on picking parcels up from a dedicated location or having the deliveries either early morning or evening. At commercial, retail or condominium developments, respondents indicated that they would prefer that the appropriate infrastructure be in place for deliveries. We also heard that respondents preferred some form of time or location specific restrictions on deliveries to locations without a back alley or loading zone (e.g. strip malls). Respondents also would like The City to look at adjusting signal timing to help goods move around more efficiently on truck routes, rather than creating specific infrastructure for trucks. For those who work in the industrial parks, the majority currently drive themselves in but a significant portion of respondents said they would prefer other options to get to work and home.

Our Operational and Regional Advisory groups, using maps provided, outlined what they felt were critical areas for the goods movement industry

inside Calgary and helped prioritize from their view what was most important in each quadrant and in the downtown core. We also received on the maps locations of projects in Rockyview County, the MD of Foothills as well as Airdrie and High River.

The Strategic Advisory group told us about protecting right of way for transportation corridors so we would have flexibility as technology and infrastructure needs changed. This group also informed us that weakening certain protections like the AVPA could cause disruption to the goods movement industry.

The focus groups told us that we needed to look at our policies to improve flexibility. We also were given ideas on how we could manage the real estate used for industrial areas and how technologies may not continue to unfold as they currently are as advancements are being made more rapidly.

How we used the input

The input from the public engagement was used to refine and validate the potential solutions that had been identified in the jurisdictional surveys and best practice review.

Key outcomes

The key outcomes of Phase Three included:

- Calgarians were invited to participate in an online survey and in-person engagement opportunities.
- The advisory groups used a map to discuss in detail where they saw opportunities for improvement for infrastructure and other issues. This gathered information to supplement the current transportation infrastructure plan.
- The project team gained an understanding of how Calgarians perceived issues and the acceptability of proposed solutions to these issues.

Phase 4: Report back and strategy development

Overview

The fourth round of advisory group sessions took place. These sessions included reporting back what we had heard and done up to this point in the project, along with potential solutions to address the issues and challenges identified. The advisory group members provided their feedback on the potential solutions.

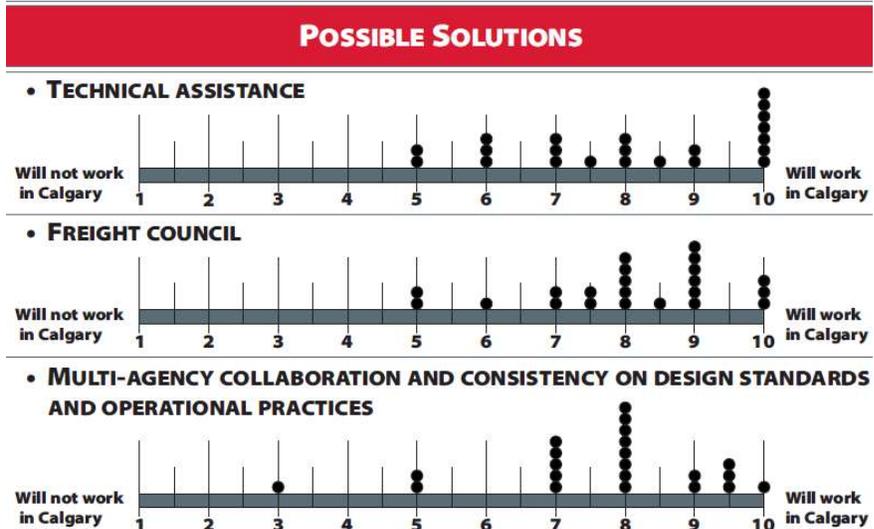
Engagement activities – what we asked

A series of topic themes were shown to the advisory group members and they were asked to rate how well they thought each of the solutions proposed in the issue categories would work in the Calgary context if they were free of barriers. This was done as a 'dot-mocracy' with each advisory group being shown the same issues and proposed solutions.

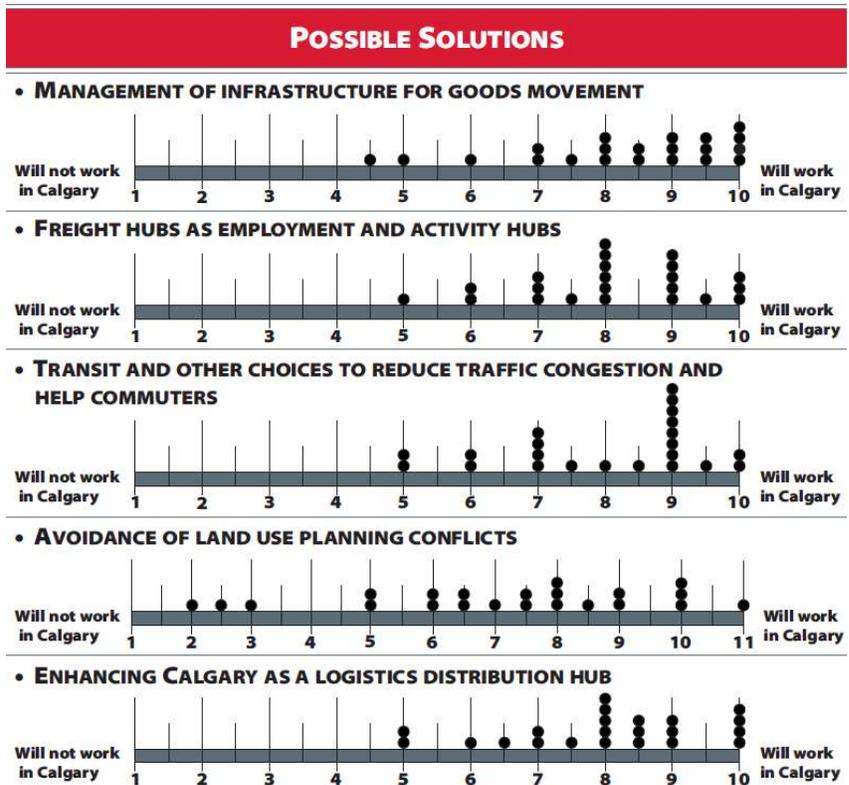
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What we heard

1. COLLABORATE WITH STAKEHOLDERS



2. PROTECT AND ENHANCE GOODS MOVEMENT INFRASTRUCTURE

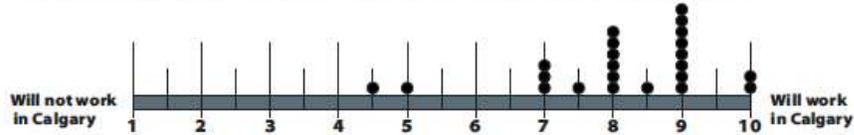


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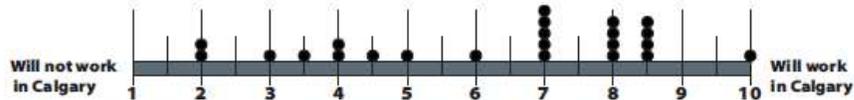
3. ENHANCE ACCESS, PARKING, LOADING AND GOODS MOVEMENT ENFORCEMENT

POSSIBLE SOLUTIONS

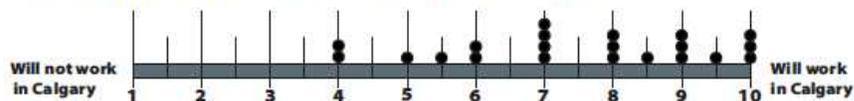
• IMPROVED INCORPORATION OF DELIVERY FACILITIES IN DEVELOPMENTS



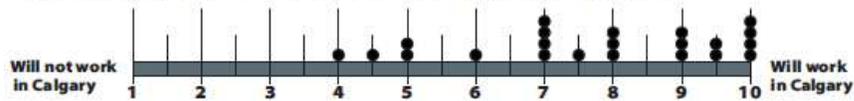
• ENHANCED SUPPLY AND USE OF ON-STREET LOADING AREAS



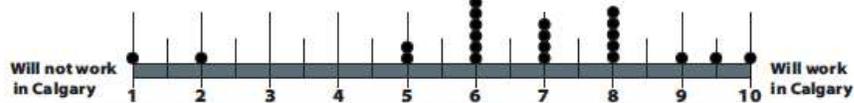
• IMPROVED COURIER AND TRUCK ACCESS CIRCULATION



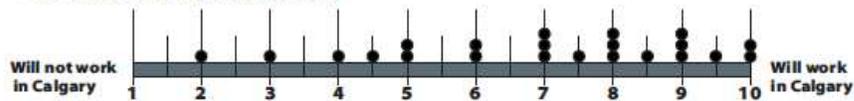
• MANAGEMENT OF TRUCKS TRAVELLING TO OR FROM CALGARY



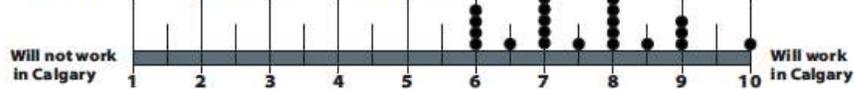
• PRIVATE SECTOR FINANCING OF NEW INFRASTRUCTURE



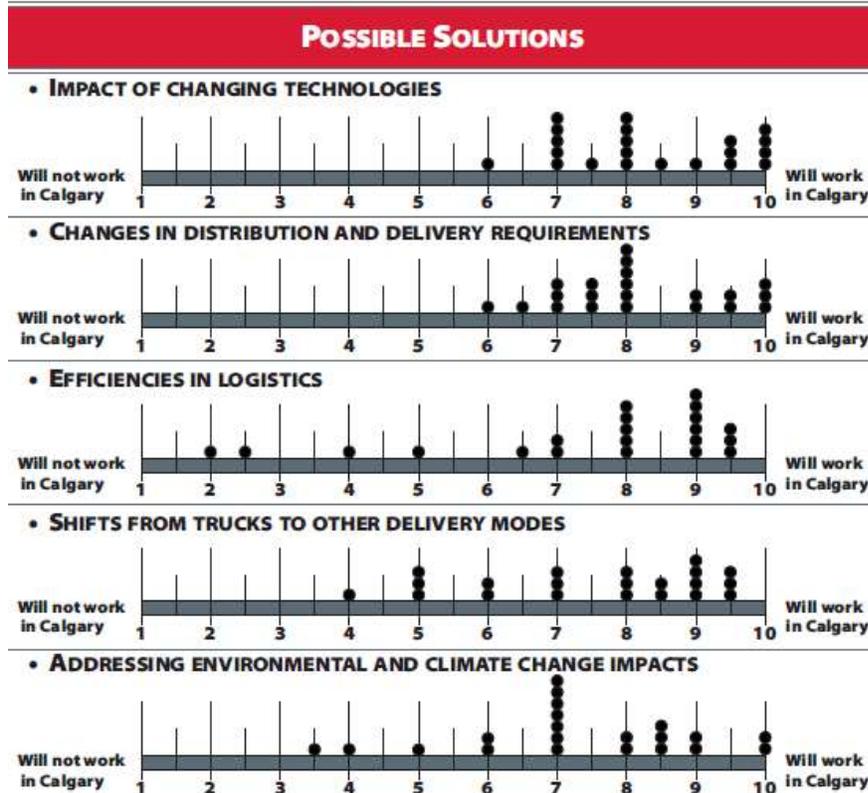
• CONSTRUCTION DISRUPTIONS



• PARTNERSHIPS WITH THE PRIVATE SECTOR



4. PLAN FOR A CHANGING FUTURE



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Key outcomes

The key outcomes from Phase Four included:

- Learned what advisory group members thought of the potential solutions the project team had developed.
- The project team revised the potential solutions based on feedback heard from advisory group members.
- The project team worked on developing the potential solutions further and incorporating them into the strategy.

Phase 5: Draft strategy

Overview

Phase Five involved sharing sections of the draft strategy with selected stakeholders, to ensure that their feedback was accurately reflected in the strategy and recommendations. This was the first time that stakeholders saw the recommendations.

Engagement activities – what we asked

Selected stakeholders were invited to attend information sessions. These stakeholders included our advisory members and some of the participants from our focus groups. Display boards were used to show them the challenges that we can work towards addressing, along with the recommendations that will help address them. Participants were asked to tell us if we had missed anything that should be incorporated into the strategy.

What we heard

Most stakeholders appreciated the opportunity to see the results of the strategy and how their input on challenges and potential solutions had been addressed, regarding the proposed infrastructure and operational improvements.

Key outcomes

The key outcomes of Phase Five included:

- Stakeholders had the opportunity to review the draft strategy and share their thoughts on it.

- The project team refined and finalized the strategy and recommendations.

Lessons learned

The project team took away a valuable communication and engagement lesson during these information sessions: it is better to delay a session to ensure that clear and concise information is presented in an effective manner. We were working on a tight timeline to prepare the materials for these information sessions, so the materials did not provide stakeholders with a clear line of sight between their issues and challenges and the recommended solutions. Some stakeholders indicated that they wanted more detailed information, especially with regards to the infrastructure map, so that they could better understand what the recommendations are and the locations they affect.

Communications strategies and tactics

Communications for the project were separated based on targeted stakeholder engagement and public engagement. This was done as targeted stakeholders have a higher-level knowledge about goods movement and the goods movement industry.

Targeted stakeholder communications

Targeted stakeholder communications were done for the advisory groups, one-on-one interviews and focus groups. The communication strategy for the advisory groups was to:

- Ensure that participants had the information they needed to participate effectively in each session
- Send pre-read information so that participants could review it in advance of each session

This was achieved through emails that were sent to selected individuals within the goods movement industry, academia or the public sector. Emails were sent in advance with information to help prepare them for participation in engagement

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opportunities. These were typically sent from the project manager or one of the project consultants, as in many cases they already had established relationships.

Public education and engagement communications

As goods movement is a complex topic, it was determined that a combined education and engagement campaign would be needed for public engagement.

The education campaign ran before the engagement campaign. It provided Calgarians with basic information about goods movement in Calgary, so that they would have a better understanding of goods movement prior to participating in engagement activities.



The education portion of the campaign ran from December 21, 2017 until January 31, 2018. The information shared as part of this campaign was designed to create awareness of goods movement and its importance in Calgary. The tactics in the education portion of the campaign drove Calgarians to visit the *Goods movement and you* webpage on Calgary.ca. That page had general information about goods movement, the importance of goods movement in Calgary, the Goods Movement Strategy, and upcoming engagement opportunities.



The engagement portion of the campaign focused on encouraging Calgarians to participate in engagement activities. It ran from February 1-16, 2018. The tactics used in the engagement portion of the campaign drove Calgarians to an online survey hosted at Engage.Calgary.ca/goodsmovement. When on that webpage, Calgarians were encouraged to fill out five short surveys related to different aspects of goods movement.

Objectives

The objectives of the education and public engagement communications campaign were:

- Increase awareness of goods movement in Calgary
- Increase awareness of the importance of goods movement in Calgary
- Have citizens participate in engagement opportunities

Tactics

The communication tactics for the education campaign were in market prior to the tactics used to promote the engagement opportunities to avoid confusing people. For both phases of the campaign, paid and organic tactics were used.

The communication tactics for the education campaign included:

- The [Goods movement and you](#) webpage on Calgary.ca;
- Digital billboard ads;

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- Transit shelter ads;
- Newspaper ads in Metro;
- *A Report to Calgarians* commercial;
- Facebook posts and an event;
- Tweets;
- Instagram posts;
- Digital Display Units in City of Calgary facilities; and
- Calgary.ca ads.

At the in-person engagement events, display boards provided participants with information about goods movement and its importance in Calgary, and the Goods Movement Strategy. Information about goods movement was presented in the form of an infographic. An infographic showing the journey of a pair of shoes from the warehouse it was created in to its delivery to the purchaser's home was included as well.



Outcomes

The strategies and tactics used for our targeted stakeholders resulted in their consistent participation in engagement activities when they were asked. These stakeholders supported the development of the Goods Movement Strategy through their participation. They provided us with information about their existing challenges with our Transportation Network, and solutions for consideration when making technical recommendations to resolve these challenges.

The strategies and tactics used for the education and engagement campaign resulted in increased traffic to the *Goods movement and you* and the engagement webpages, where Calgarians were able to learn more about goods movement and participate in engagement activities. Calgarians interacted with the social media posts about goods movement, increasing their awareness and knowledge about both topics. As well, Calgarians participated in engagement activities, by attending in-person events and filling in the online survey questions.

Appendix 1: One-on-one interview guide



CITY OF CALGARY GOODS MOVEMENT STRATEGY INTERVIEW GUIDE – PRIVATE SECTOR

The City of Calgary is developing a Goods Movement Strategy. The Strategy will:

- Identify and prioritize short, medium and long term actions and investments in transportation infrastructure to enhance the goods movement network in Calgary.
- Support the Calgary Transportation Plan (CTP) and Municipal Development Plan (MDP).
- Complement other City and regional economic development initiatives.

As well, the City's bylaws related to goods movement will be reviewed and consolidated where appropriate as part of the Goods Movement Strategy. This includes the truck route map and bylaw 60M90.

The City has appointed a consulting team to develop the Strategy. The team is led by the Watt Consulting Group, in association with David Kriger Consultants and CPCS.

To aid in the development of the Strategy, the consultants are conducting interviews with key public and private goods movement stakeholders in and around Calgary. This interview will give you a chance to communicate your experiences, needs and ideas that can inform the development of the Goods Movement Strategy.

This interview guide is meant to help participants prepare for the interview. Please note:

- The questions / topics below are guidelines only, to help the discussion.
- The discussion is meant to be open-ended.
- Some points might not apply to your particular organization or might be of lesser importance, so they can be omitted.
- Information gathered will be shared with the City of Calgary and will be used to inform Strategy reports, but will not be directly attributed in any documents without your permission, nor will your organization be identified by name without your permission.

Participation in this interview is voluntary. All responses will remain anonymous when reported. No personal information will be disclosed.

The personal information collected via this interview is being collected under the authority of section 33 (c) of the Freedom of Information and Protection of Privacy (FOIP) Act. The information will be used for the purpose of The City of Calgary Goods Movement Strategy. You may receive future correspondence and emails pertaining to this project. If you have any questions regarding the collection and use of this information, please contact 3-1-1.

Goods Movement Strategy Engagement and Communications Summary Report

1. From the perspective of your organization, which of the following are the most important goods movement issues in or around Calgary? Please pick the Top 3 issues and rank them. 1 = most important.

<input type="checkbox"/> Congestion on Provincial highways, in or around Calgary	
<input type="checkbox"/> Congestion on other roads, in or around Calgary	
<input type="checkbox"/> Inadequate road access to rail terminals or to the airport	
<input type="checkbox"/> Inadequate road access to shippers / receivers	
<input type="checkbox"/> Inadequate intercity connectivity (road, rail or air)	
<input type="checkbox"/> Need for improved / additional transportation links (where?)	
<hr/>	
<input type="checkbox"/> Supply and location of zoned and serviced employment and industrial lands	
<input type="checkbox"/> Inconsistent truck route regulations / designations	
<input type="checkbox"/> Changing logistics, retailing and/or distribution patterns (e.g., e-commerce, automation)	
<input type="checkbox"/> Conflicts with other traffic, including transit, pedestrians and cyclists	
<input type="checkbox"/> Trucks moving through residential neighbourhoods or other sensitive areas	
<input type="checkbox"/> Traffic signal timing / coordination on arterials	
<input type="checkbox"/> Inadequate space for truck or courier loading / parking, on-street or off-street	
<input type="checkbox"/> Operating costs for goods movement	
<input type="checkbox"/> Reducing greenhouse gas (GHG) emissions / air pollutants	
<input type="checkbox"/> Keeping up with emerging technologies such as alternative fuels and/or regulatory standards	
<input type="checkbox"/> Bottlenecks (where?)	
<hr/>	
<input type="checkbox"/> Other (please describe)	
<hr/>	

2. What is the nature of your goods movement operations in Calgary? What types of goods do you carry? What types of industries do you serve? What area/geography do you cover?
3. Approximately what volume or tonnage do you move in and around Calgary? Please indicate whether these are daily, weekly, monthly or annual amounts.
4. Do you have an in-house truck fleet? If so, how many vehicles do you have in your fleet? What types (categories) of vehicles are they? Do you have hybrid or other alternative-energy vehicles?

Goods Movement Strategy Engagement and Communications Summary Report

5. What is working well in terms of moving goods in and around Calgary, and what are the implications of each for your business / operations?

	Aspect	Implications for your business / operations
1.		
2.		
3.		

6. What trends would you say are most likely to affect the movement of goods in and around Calgary in the next 10 years, and what are the implications for your business / operations?

	Trend	Implications for your business / operations
1.		
2.		
3.		

7. Do you have any suggestions or solutions to address the issues and challenges identified above? What are the short-term and long-term opportunities that would improve how goods move in and around Calgary?

	Short term opportunities	Long term opportunities
1.		
2.		
3.		

8. Are you aware of any policies/actions that other urban regions/carriers are taking to improve goods movement for operations similar to yours? If so, what are they and do you think they could be applied in and around Calgary?
9. What would an ideal system for urban goods movement in and around Calgary look like?
10. What role do you think the City of Calgary can play most constructively in getting us to this ideal future?
11. Are there any other comments you would like to make regarding urban goods movement in and around Calgary?

Thank you!

Appendix 2: Small business survey



THE CITY OF CALGARY GOODS MOVEMENT STRATEGY - SEEKING YOUR INPUT

Every day, Calgary's businesses ship thousands of goods to and from customers across the city, throughout Alberta and around the world. To ensure that its transportation network continues to support the economic vitality of our businesses, The City of Calgary is developing a Goods Movement Strategy. The strategy will recommend policies and actions to improve goods movement, and will update and consolidate The City's truck bylaws.

The City of Calgary, with the participation of the Calgary Chamber of Commerce, is conducting a brief survey of Calgary's businesses. This is **your** chance to tell us about the goods movement issues and opportunities that are important to you. We will use the results of the survey to inform the development of the Goods Movement Strategy.

The survey has 12 questions. It can be completed in about 10 minutes.

For more information about the Goods Movement Strategy please visit calgary.ca/goodsmovement, or contact:

- Madhuri Seera, The City of Calgary (project manager), madhuri.seera@calgary.ca

Participation in this survey is voluntary. All responses will remain anonymous when reported. No personal information will be disclosed.

The personal information collected via this survey is being collected under the authority of section 33 (c) of the Freedom of Information and Protection of Privacy (FOIP) Act. The information will be used for the purpose of The City of Calgary Goods Movement Strategy. You may receive future correspondence and emails pertaining to this project. If you have any questions regarding the collection and use of this information, please contact 3-1-1.

Goods Movement Strategy Engagement and Communications Summary Report

1. Where do you typically ship to or receive goods, packages, parcels, etcetera from? (Check all that apply)													
<input type="checkbox"/> Within Calgary city limits <input type="checkbox"/> Elsewhere in Alberta <input type="checkbox"/> USA	<input type="checkbox"/> Surrounding region (e.g., Rocky View County, ...) <input type="checkbox"/> Elsewhere in Canada <input type="checkbox"/> Other international												
2. How frequently do you ship or receive goods, packages, parcels, etcetera? (Check one box only)													
<input type="checkbox"/> Several times daily <input type="checkbox"/> Several times each week (but not every day) <input type="checkbox"/> About once each month	<input type="checkbox"/> About once each day <input type="checkbox"/> About once each week <input type="checkbox"/> Infrequent (less than once each month)												
3. What modes do you typically use to ship or receive goods, packages, parcels, etcetera? (Check all that apply)													
<input type="checkbox"/> Truck or van <input type="checkbox"/> Courier / express delivery services <input type="checkbox"/> Air <input type="checkbox"/> Taxi or personal auto <input type="checkbox"/> Other (please describe) _____	<input type="checkbox"/> Canada Post (excluding regular mail) <input type="checkbox"/> Rail <input type="checkbox"/> Marine <input type="checkbox"/> Bicycle or on foot												
4. Does your organization own/lease or operate its own fleet of vehicles in the Calgary Region?													
<input type="checkbox"/> No, my organization does not own/lease or operate its own fleet of vehicles in the Calgary Region → go to Question 5													
<input type="checkbox"/> Yes. If yes, please indicate how many vehicles of each type are in your organization's fleet in the Calgary Region. (Include all categories that apply)													
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Number in fleet</th> <th>Vehicle category</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">_____</td> <td>Light single unit truck or van (four tires – e.g. pick-up truck)</td> </tr> <tr> <td style="text-align: center;">_____</td> <td>Medium single unit truck or van (two axes, six tires - e.g. delivery van, tow truck)</td> </tr> <tr> <td style="text-align: center;">_____</td> <td>Heavy single unit truck (three or more axes – e.g., cement mixer)</td> </tr> <tr> <td style="text-align: center;">_____</td> <td>Heavy multi-unit trucks or power units with one or more trailers</td> </tr> <tr> <td style="text-align: center;">_____</td> <td>Other (specify) _____</td> </tr> </tbody> </table>	Number in fleet	Vehicle category	_____	Light single unit truck or van (four tires – e.g. pick-up truck)	_____	Medium single unit truck or van (two axes, six tires - e.g. delivery van, tow truck)	_____	Heavy single unit truck (three or more axes – e.g., cement mixer)	_____	Heavy multi-unit trucks or power units with one or more trailers	_____	Other (specify) _____
Number in fleet	Vehicle category												
_____	Light single unit truck or van (four tires – e.g. pick-up truck)												
_____	Medium single unit truck or van (two axes, six tires - e.g. delivery van, tow truck)												
_____	Heavy single unit truck (three or more axes – e.g., cement mixer)												
_____	Heavy multi-unit trucks or power units with one or more trailers												
_____	Other (specify) _____												
5. What volume of goods do you ship or receive in a typical shipment?													
<input type="checkbox"/> Usually less than a truckload / carload / container load (vehicle, vessel, car or container is shared with other shippers) <input type="checkbox"/> Usually more than one truckload / carload / container load (more than one vehicle, vessel, car or container is dedicated to your shipment) <input type="checkbox"/> Don't know <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Usually a single full truckload / carload / container load (vehicle, vessel, car or container is dedicated entirely to your shipment) <input type="checkbox"/> Varies from shipment to shipment												
6. Do you offer e-commerce (shopping on-line) to your customers / clients?													
<input type="checkbox"/> No, not applicable → go to Question 7													

Goods Movement Strategy Engagement and Communications Summary Report

The City of Calgary
Goods Movement Strategy

Calgary Chamber of Commerce
Online Survey

No, but I plan to offer e-commerce in the future → go to Question 7

Yes. if yes, how do customers / clients receive their purchases? (Check all that apply)

- Customer picks up the purchase at my location
- Customer picks up the purchase from another location
- Special delivery to the customer by courier or other express service
- Regular delivery to the customer by truck or courier on a regular delivery schedule
- Other (please describe) _____

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Goods Movement Strategy Engagement and Communications Summary Report

7. Which of the following do you see as the most important goods movement issues in or around Calgary today?
(Pick the Top 3 issues and rank them, 1 = most important)

- Congestion on roads and highways, in or around Calgary
- Inadequate road / highway access to rail terminals or to the airport
- Inadequate road / highway access to shippers / receivers
- Inadequate intercity connectivity (road, rail or air)
- Need for improved / additional transportation links (where?) _____
- Inadequate intersection design / road capacity (where?) _____
- Urban sprawl (serving sites over a large geographical area)
- Supply of zoned and serviced employment and industrial lands for development
- Inconsistent truck route regulations or designations / signage
- Securing permits for oversize / overweight loads
- Changing logistics, retailing and/or distribution patterns (e.g., e-commerce, automation, ...)
- Conflicts with other traffic, including transit, pedestrians and cyclists
- Trucks moving through residential neighbourhoods or other sensitive areas
- Traffic signal timing / coordination on arterials
- Inadequate space for truck / courier loading / parking, on-street or off-street
- Hours of operation (when loads can be picked up or delivered)
- Operating costs / operating efficiency for goods movement (e.g., fuel, load management, empty backhaul, ...)
- Reducing greenhouse gas (GHG) emissions / air pollutants
- Keeping up with emerging technologies (such as alternative fuels), and/or new regulatory standards
- Availability of skilled labour
- Other (please describe) _____

Goods Movement Strategy Engagement and Communications Summary Report

8. What opportunities do you see for addressing these issues? <i>(Please describe)</i>		
9. Which one of the following industrial sectors best describes your establishment in the Calgary Region? <i>(Check one box only)</i>		
<input type="checkbox"/> Agriculture, forestry, fishing, hunting or mining <input type="checkbox"/> Utilities <input type="checkbox"/> Wholesale trade <input type="checkbox"/> Transportation and warehousing <input type="checkbox"/> Finance and insurance <input type="checkbox"/> Professional, scientific and technical services <input type="checkbox"/> Administrative and support services <input type="checkbox"/> Educational services <input type="checkbox"/> Arts, entertainment and recreation <input type="checkbox"/> Other services (except public administration) <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Construction <input type="checkbox"/> Manufacturing <input type="checkbox"/> Retail trade <input type="checkbox"/> Information <input type="checkbox"/> Real estate rental and leasing <input type="checkbox"/> Management of companies and enterprises <input type="checkbox"/> Waste management and remediation services <input type="checkbox"/> Health care and social assistance <input type="checkbox"/> Accommodation and food services <input type="checkbox"/> Public administration	
10. How many people does your organization currently employ in the Calgary Region? <i>(Check one box only. Include full time, part time and seasonal workers. Include <u>only</u> those people who work in the Calgary Region, but include <u>all</u> locations in the Calgary Region.)</i>		
<input type="checkbox"/> Micro (1 to 5) <input type="checkbox"/> Medium-Large (100 to 199)	<input type="checkbox"/> Small (6 to 19) <input type="checkbox"/> Large (200 to 499)	<input type="checkbox"/> Medium (20 to 99) <input type="checkbox"/> Very large (500+)
11. What modes do your employees in the Calgary Region normally use to get to / from work? <i>(Check all that apply)</i>		
<input type="checkbox"/> Personal vehicle (automobile, motorcycle, etc.) <input type="checkbox"/> Calgary Transit or other transit <input type="checkbox"/> Walk all the way <input type="checkbox"/> Bicycle all the way <input type="checkbox"/> Other (please specify) _____		
12. Would you like to make any other comments regarding goods movement issues and opportunities in Calgary?		

Thank you. You have now completed the survey. Please press the 'submit' button to submit your responses.