



Barton Village BIA
Commercial Market Assessment Update

FINAL
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Prepared by:
360 Collective
99 Ivy Ave, Suite 100
Toronto, ON M4L 2H8
www.360collective.co
647 339 9008

with support by:
Page by Page Consulting





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EXECUTIVE SUMMARY



Executive Summary

Introduction

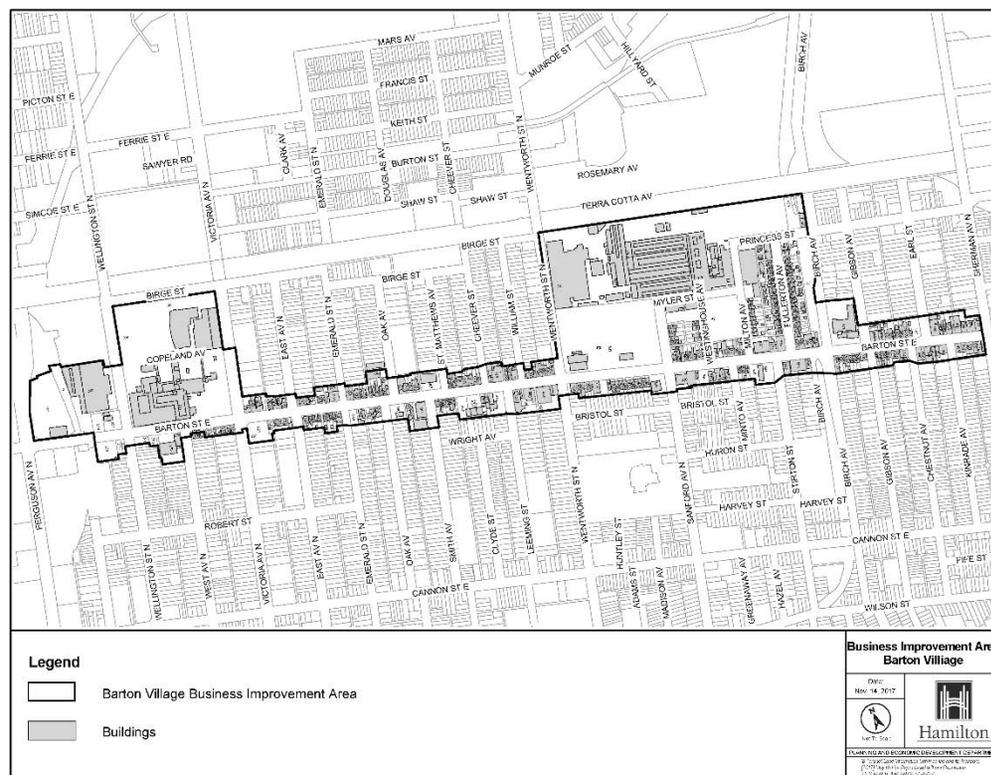
360 Collective was retained by the City of Hamilton (City) and Barton Street Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of Barton Village BIA area completed in 2010/2011. The study process included a thorough review of the demand and supply characteristics of the BIA to inform changes to their internal action plans.

The process included:

- Review of movement into and through the BIA
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and was reviewed with BIA members at an open workshop. The suggested action plan was completed after the workshop and reviewed with members.

Barton Village BIA





SWOT

Strengths

- Hard working independent businesses
- Increased commercial, residential, and mixed-use investment from both local Hamilton and outside Hamilton developers
- Changing socio-economic profile of local residents to younger families
- Investment in institutions such as Hamilton General Hospital and other health institutions
- Businesses catering to daytime residents and workers as well as a growing night time and weekend economy
- Increased recognition in the public relations on the positive changes happening

Weaknesses

- Lower household income of local area households
- Social issues as well as mental health and poverty in the local neighbourhood
- Concern over perceived and real criminal activities
- A risk of polarizing local neighbourhood in terms of income
- Continued issues with the lack of retail continuity on the street and the number of commercial to residential conversions
- Potential to take away special incentives for Barton St. redevelopment and investment

Opportunities

- Increased demand for goods and services for a changing local neighbourhood
- Serving the local employees in the area and those flowing through the area to the Downtown, harbour area, and the east end
- A strong base of destination businesses that provide a unique character
- Investment in new creative industries that may not be typically associated with visual arts

Threats

- Clean and safety issues
- In the face of gentrification pressures, the area should be allowed to grow and adjust to positive and growing market conditions including redevelopment but it should also allow for social issues (e.g., residents in need) in the area to be addressed in a positive manner



Changes in Recommendations from 2011 to 2017/2018

The following are noted changes in Barton Village BIA in terms of suggested recommendations in 2011 and the current market assessment report in 2017/2018.

Changes in Recommendations from 2011 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Continue to be a voice for Barton Village with the City of Hamilton to ensure parking, property standards, parks and recreation, Hamilton BIAS, special events, etc. assist in the revitalization efforts of this neighbourhood street.	This continues to improve as City staff and BIA relations are solidified. However, it is a work in progress, including with City Councillors.
The budget should not be increased except through increased assessments that arise through redevelopment	<p>The BIA budget will need to be addressed for the types of programs and services that members want to be developed. This may include a one-time spike in the budget to fund special projects such as a branding program. The BIA should work with the City at assessing different levies based on property assessment and changes to the caps or % assessment on some properties.</p> <p>Given the BIA has decided to a modest expansion of the BIA boundary, the BIA and the City should determine the implications on the levy if they hold the levy on all other properties the same.</p>
The business mix should include both neighbourhood goods and services as well as destination businesses in arts, culture, business to business, furniture, etc.	The mix will continue to evolve. There are opportunities for local neighbourhood and daytime worker demand. However, the focus will shift more towards cultivating would-be entrepreneurs and investors as to who will invest in Barton Village rather than just focusing on what types of businesses.



<p>Affordable rents and land values are to be marketed</p>	<p>While affordability is a good starting position, with redevelopment it is not a long term sustainable proposition. A brand campaign will uncover the essence of why businesses should locate in Barton Village.</p> <p>A key goal for the BIA is how to get increased public and private sector investment.</p>
<p>Increased learning for BIA members</p>	<p>Have done workshops and other programs such as social media, grants, networking events, etc. The BIA is anticipating growing these workshops further.</p>
<p>On a block-by-block basis work with property owners and City staff to determine the building, zoning, and commercial assessments for each property</p>	<p>Much of this work was conducted in the Barton Kenilworth study but there are still deficiencies in terms of which businesses are commercial and which ones are residential.</p>
<p>Work with City on guidelines for design and physical improvements</p>	<p>Was part of the Barton Kenilworth Study and still awaiting implementation of key study recommendations. The BIA sees the need for streetscape improvements and is looking for City of Hamilton support for this work.</p>
<p>Develop a Clean and Safe Protocol and hire clean up staff</p>	<p>BIA hired a beautification assistant for the summer. The protocol component is to be undertaken. But the BIA can set up some standard procedures on who to call regarding clean and safety issues (e.g., police, how to report an incident to the police, broken lamp posts, etc.)</p>
<p>Develop more artist live/work spaces</p>	<p>This has begun and other incubators spaces have reached out to the BIA to join as members. Barton is a great place to test new business concepts. The redevelopment of the Westinghouse building is underway and will be a catalyst project for the street.</p>



	However, more work can be done to institutionalize and make permanent these business incubator spaces. This will ensure that Barton Village's unique character will remain in the face of development pressures.
Continued enhancements of Woodland Park	Some progress has been made including an extreme park makeover but more work is required to integrate the park into the streetlife and BIA.
Add more lighting to buildings to enhance the creative side of the BIA identity	The BIA could look at programs in other BIAs related to their lighting programs.
Continue with umbrella type marketing that illustrates both positive and neighbourhood focused images of Barton Village	Good work has been made including Cable 14 news stories, developing video on local and regional businesses (profiles). Significant progress has been made in social media through the 2018 summer hiring of a social media person. The improved social media has resulted in higher attendance at events and engagement with targeted audiences.
Develop more neighbourhood-oriented festivals and events	Yes
BIA to assist businesses that want to develop events	May not be realistic given current budget constraints but some progress has been made
Extend marketing reach to local employers	Have worked with employers such as the hospital on promoting new business openings and have delivered Barton Gift Certificates to be given to local employees to use at businesses. This has worked well and is being extended through the BIA social media outreach.
Work with the City on ways to improve the public's perception of Barton Village in the region including positive public relations articles	Work in progress but some positive momentum is being made.



Vision

Previous Vision

The previously articulated vision for Barton Village BIA was to focus on three key goals:

- Continuing to improve and enhance the clean and safe programs including the BIA staff person, reporting protocols on property standards, police liaison work, among other initiatives
- Enhancing the businesses and services that cater to the local residential population
- Creating a pedestrian friendly atmosphere and places for local residents for recreation including Woodlands Park

Barton Village BIA will need to commit to a program of writing and agreeing on:

- Vision statement
- Mission statement (as set by the Provincial Municipal Act)
- Brand and brand guidelines
- New policies and procedures for how the BIA will be organized

This report will assist in understanding the dynamics and future opportunities on the street.



Barton Village BIA Action Plan

The following action items are meant to stimulate internal conversation within the BIA staff and members, committee and task forces, as well as the City of Hamilton and other partners.

The action items are divided into the four pillars of organization, economic development, physical improvements, and marketing. The listed action items are suggestions for the BIA and the City to follow. They do not imply that the BIA nor the City is responsible for their implementation. They do not carry any financial burden on either party. This commercial market study report and action item list should be used by various committees of the BIA and City departments as background information to inform decision making moving forward.

Each action item includes the following elements:

- Specific task
- Measurement
- Action item
- Responsibility
- Time frame

The action items and recommendations are based on the four pillars including:

- Organization/governance
- Economic development
- Physical improvements and programs for enjoyable shopping
- Marketing including both customer focused marketing (promotions, social media, traditional media, etc.) and an investor attraction marketing component



Organization

STRATEGIC GOAL

- Continue to enhance the BIA organization including staff, board members, and volunteers to carry out the programs

RATIONALE

- A financially dedicated organization is required to support the members and create an environment where it is possible for businesses to be successful

DESIRED RESULT

- The consistency of organizational leadership that members can rely on for advocacy, internal communications, and marketing
- While there are opportunities to facilitate economic development, the BIAs role will be primarily liaison in nature and not extensive coordination

HOW TO ACCOMPLISH

The following highlights key suggested recommendations for the Barton Village BIA organization.

Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Develop a brand, vision statement, mission statement, and policies and procedures manual	<ul style="list-style-type: none">• Sequentially address each item until completed	<ul style="list-style-type: none">• Use existing resources as templates but develop a calendar schedule to solicit input and work on each item	BIA	Immediate



<p>Increase internal communications</p>	<ul style="list-style-type: none"> • Commit to key deliverables such as monthly email newsletter, weekly email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only 	<ul style="list-style-type: none"> • Develop a calendar of communications correlated to different mediums • Ensure BIA database is current – if not, work with City to get contact information • Ensure BIA is getting timely updates from the City on relevant projects 	<p>BIA Executive Director</p>	<p>Immediate and ongoing</p>
<p>Increase BIA Budget</p>	<ul style="list-style-type: none"> • Minimum growth with inflation and allows natural increase with the total assessment increase 	<ul style="list-style-type: none"> • Increase BIA budget inline with BIA boundary expansion • BIA budget may be increased for a one time expenditure such as branding • Assessment value of BIA and keep the budget at a core rate compared to 	<p>BIA with assistance from City of Hamilton</p>	<p>Immediate to Short Term</p>



		<p>assessed value (look at past assessment values)</p> <ul style="list-style-type: none"> Consider removing caps on businesses or increasing the % caps 		
Develop a Clean and Safe Task Force with area partners	<ul style="list-style-type: none"> Resources dedicated clean and safe for the BIA 	<ul style="list-style-type: none"> Task Force is responsible for internal communication with members to increase reporting, data base tracking, liaison with police and community outreach workers, etc. 	BIA and members as well as area partners	Immediate
Ensure BIA organization is current with City required policies – social media and procurement	<ul style="list-style-type: none"> Number of policies in place and year they were last updated 	<ul style="list-style-type: none"> Ensure BIA has updated social media and procurement policies Review and update these and other policies on a regular basis 	BIA	Immediate



Partnerships	<ul style="list-style-type: none">• Number of valuable partnerships• Review partnerships every six months to every year	<ul style="list-style-type: none">• Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA• Prioritize partnerships based on current and future impact to the BIA (Hospital, Westinghouse, Cotton Factory, social services, houses of worship, etc.)• Address issues such as anti-gentrification through the BIAs work with various partners that improves quality of life	BIA	Short to Medium Term
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<p>Review BIA boundaries to expand or contract</p>	<ul style="list-style-type: none"> • Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> • Current expansion at Sherman is under review • Every two years, review boundaries and determine if changes are merited • BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Barton Village BIA, are business competitive or complementary, and pros/cons on BIA levy 	<p>BIA potentially in coordination with City Urban Renewal</p>	<p>Current and Ongoing</p>
<p>Change committee structure to Task Force structure</p>	<ul style="list-style-type: none"> • Number of task forces and competed items 	<ul style="list-style-type: none"> • Develop short term task forces that board members and members can work on for short 	<p>BIA</p>	<p>Short to Medium Term</p>



		durations to produce results		
Focus AGM and other meetings on positive learnings	<ul style="list-style-type: none">• AGM participation and feedback process	<ul style="list-style-type: none">• Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA• Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc.	BIA	By next AGM



Economic Development

STRATEGIC GOALS

Barton Village BIA will provide an opportunity for:

- Retail and commercial entrepreneurs, businesses, and investors to locate, expand, and thrive by being able to
 - Nurture local entrepreneurs to start up and expand new businesses in the BIA
 - Look to young entrepreneurs that can grow their business ideas within the BIA
 - Focus on businesses with previous business experience
 - Increase health and wellness type businesses and spin off type businesses especially those related to the hospital
 - Attract outside investment
 - Focus on “who” these entrepreneurs and investors are rather than on what types of businesses would do well
- Attract high quality workforce to live and work nearby and in the Greater Downtown Area

RATIONALE

- By focusing on the “who” - entrepreneurs and investor types, it allows for the BIA to be nimble and flexible as new innovative business ideas take shape (many of which have not been considered yet)
- Allows Barton Village BIA businesses to stay competitive and innovate.
- Increases the real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of the Barton Village BIA.
- Creates a diversified economy throughout Hamilton

DESIRED IMPACT

- Decreased vacancy
- A non-traditional main street experience that is more focused on entrepreneurs and interesting investors than on the clusters or types of businesses
- Enhanced local serving demand from residents and workers as well as visitors (hospital visitors and regional visitors)



HOW IT GETS DONE

- The City of Hamilton and the BIA allows for business opportunities to grow through retention, expansion, and recruitment programs.
- To foster an economic climate that supports the economic health of existing businesses and encourages the location of new businesses that fit within the overall vision.
- Focus less on a directory of businesses and physical brochures as the business mix will change constantly. A digital only version of the business mix is sufficient.
- Will be based on five key strategies:

Five Key Strategies

1. Identify both retail and commercial opportunities, gaps, and strengths to build upon (based on criteria of finding a partner in Barton Village BIA that supports the sector)
2. Define investor recruitment targets
3. Strengthen infrastructure
4. Review planning context
5. Make investment easier



Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Local Neighbourhood Goods and Services	Grocers, pharmacy, cafes, coffee/tea, hardware, personal services, etc.	<ul style="list-style-type: none"> • Create clusters of local neighbourhood serving goods and services to take advantage of the local residential and daytime worker population • The BIA is too long to have the entire street devoted to local goods and services. These businesses need to be clustered tightly together to create impact and draw
Eating Establishments	Cafes, coffee/tee, quick service, dining, blurred services with other services or retail offering, night time economy, entertainment focused	<ul style="list-style-type: none"> • Not mutually exclusive from some other sectors especially local and incubator based businesses. • Growing trend for BIA businesses to focus on
Incubator	Small scale value-added local production: food, agriculture, artisan manufacturing, on farms and in Hamilton; retail distribution in Hamilton and Barton Village stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> • An underdeveloped resource that diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in a supportive ecosystem) • Develop in partnership with the value-added agriculture sector, artisans, existing micro-businesses, arts and culture groups, local institutions and with potential provincial support • Build a "food entrepreneurship ecosystem" tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Farmers Markets, co-tenancy in stores, organizing "Hamilton food" stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen



	Description	Rationale and Tactics
		<p>incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.)</p> <ul style="list-style-type: none"> • Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts Council) to explore their needs and best practices and build strategy and ecosystem to support their growth. Tactics parallel those described above for food. • Start by identifying Hamilton residents currently making and selling artisan products. • Encourage craft type markets
Social Service Agencies and Retail	Live and work life skill learning, volunteers, vulnerable residents	<ul style="list-style-type: none"> • Encourage social organizations to develop quality retail and services many of which already exist • Develop art and craft programs and markets to showcase their goods
Creative	Creative industries – beyond visual arts to other companies such as website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> • Prerequisite: high speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity. • Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.
Arts & Culture	Visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> • Leverage assets in the Barton Village BIA such as Westinghouse, schools, social services, as well as cafes and restaurants as venues for display and performance as well as potential arts markets, arts events, etc. • Partner with adjacent places such as Cotton Factory on community events, programming, and development.



	Description	Rationale and Tactics
Destination Businesses	Create an opportunity for businesses to establish themselves based on convenience of location as well as customer engagement	<ul style="list-style-type: none"> Synergy with tourism development. Build reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community) Provide liaison and linkage services for property owners, brokers, and site selectors promoting the benefits of locating in Barton Village

Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Identify retail and commercial priority sectors to fill gaps and leverage opportunities	<ul style="list-style-type: none"> Increase in retail and commercial cluster strength Reduced vacancy Positive absorption Increase retail merchandise to 15% and increase food and drug retail to 15% Lower vacancy 	<ul style="list-style-type: none"> Discuss with BIA and City (and other stakeholders) on potential growth sectors based on agreed prioritization of: <ul style="list-style-type: none"> Local partner interest Good regional growth prospect Strong competitive positioning Aligned with Provincial priorities 	<ul style="list-style-type: none"> City of Hamilton and BIA 	<ul style="list-style-type: none"> Medium to long term



<p>Define investor recruitment targets</p>	<ul style="list-style-type: none"> Clearly defined investor target audience 	<ul style="list-style-type: none"> Develop a list and articulate who the City and the BIA are targeting in attracting investment and recruiting new businesses. May include: <ul style="list-style-type: none"> Millennials, Ethnically diverse Millennials Business expansion Social service provider of life skills through retail Outside investors Others 	<ul style="list-style-type: none"> City and BIA 	<ul style="list-style-type: none"> Medium to long term
<p>Strengthen infrastructure</p>	<ul style="list-style-type: none"> Business turnover decreased New business openings 	<ul style="list-style-type: none"> Clean and Safe Task force New streetscape plans Investment in Wi-Fi in Downtown including Barton Village High speed internet and broadband width Incubators 	<ul style="list-style-type: none"> City 	<p>Medium Term</p>



Review planning context	<ul style="list-style-type: none"> • Updates to Barton Kenilworth Study and recommendations 	<ul style="list-style-type: none"> • Review Barton Kenilworth Study for further updates to City policies and guidelines 	<ul style="list-style-type: none"> • City 	<ul style="list-style-type: none"> • Ongoing
Make Investment easier	<ul style="list-style-type: none"> • New business openings • New mixed use developments 	<ul style="list-style-type: none"> • BIA can post listings of properties for lease or sale, develop and post retailer and commercial wish list, and provide linkages to key broker sites that are leasing/selling properties • City can reduce costs, risks, and barriers to investment including: <ul style="list-style-type: none"> ▪ Competitive tax rates, development friendly approval processes, market current opportunities 	<ul style="list-style-type: none"> • City and BIA 	<ul style="list-style-type: none"> • Medium Term



		<ul style="list-style-type: none">▪ Develop sector specific recruitment materials▪ Review all incentives and marketing of incentives against the economic development plan▪ Increased residential and office mixed use developments		
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The BIA believes that improved collaboration between the City of Hamilton and the BIA should take place to move forward on these action items since the BIA is currently not in a financial or resource based situation to lead the charge on business retention and expansion.



Physical Improvements and Programs for Enjoyable Shopping

STRATEGIC GOAL

- Use placemaking elements as part of an overall economic development strategy to increase dwell time, increase sales opportunities for businesses, and as a business investor attraction component.

RATIONALE

- Placemaking elements such as beautification must extend beyond planting flowers and banners. The use of placemaking elements needs to have a community building and social gathering element to it that supports business sales development.
- In a hyper competitive context of online retail, shopping centres, power centres, and increasingly competitive main streets, placemaking elements can be a key differentiator
- Placemaking can also be part of a recruitment economic development program that attracts investment to Barton Village.

DESIRED IMPACT

- Increased dwell time for visitors who stay longer, shop more and spend more.
- Offers opportunities for people to meet, social, build community.
- Allows for businesses to engage in guerilla marketing techniques that targets infrequent visitors (e.g., hospital visitors, destination business visitors, etc.) that encourages visitors to stay longer in the BIA
- Creates an environment that attracts further investment.

HOW TO ACCOMPLISH

- Parking
- Urban Plazas and City Squares – Create Opportunities for Amenities to Happen
- Patios
- Multifunctional Street Art and Amenity
- Proper Use of Lighting



Physical Improvement Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Any streetscape plans must be vetted through the lens of economic development	<ul style="list-style-type: none"> A required step in any streetscape changes 	<ul style="list-style-type: none"> Develop a protocol whereby streetscape changes are vetted through the lens of potential positive impacts on area businesses including trade offs 	<ul style="list-style-type: none"> City of Hamilton and BIA 	<ul style="list-style-type: none"> Immediate to Long Term
Review parking needs in light redevelopment, loss of surface parking lots, maintaining or growing existing supply, and increased use of technology	<ul style="list-style-type: none"> Measure the effect of losing parking spaces on office sector needs, visitation, 	<ul style="list-style-type: none"> As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones 	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> Patio administration program for Barton Village BIA is completed BIA should meet with Parking and Transportation on an annual basis to review changes to parking and loading
Review physical and digital wayfinding	<ul style="list-style-type: none"> Increased visitation Reduced wayfinding complaints 	<ul style="list-style-type: none"> Review with City location of wayfinding signage and determine ways to 	<ul style="list-style-type: none"> BIA and City 	<ul style="list-style-type: none"> Review annually



		<p>increase signage to Barton Village</p> <ul style="list-style-type: none"> • Constantly update any digital wayfinding elements 		
<p>Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases</p>	<ul style="list-style-type: none"> • Conduct a study 	<ul style="list-style-type: none"> • Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy 	<p>BIA and City of Hamilton</p>	<p>One year</p>
<p>Develop art programs such as an oversized mural campaign Note – they must be professional</p> <p>Another program is that all redevelopment hoarding must include a minimum amount of public art</p>	<ul style="list-style-type: none"> • Number of professionally completed murals 	<ul style="list-style-type: none"> • Partner with area buildings such as the hospital, art programs, and others to gain interest, get PR and provide funds for murals • Implement findings from the Willowbank streetscape program 	<p>BIA and partners</p>	<p>One to two years</p>



12.4 Marketing

CONTEXT

- Develop a program for a new Barton Street BIA to create positive messaging for visitation and investment attraction.

STRATEGIES

- Create a common brand as well as a vision statement and mission statement that reflects the true character of Barton Village, the potential for increased investment, and the changes it will be going through.
- Create a common “commercial” Barton Village brand to be used for visitor attraction and investor attraction.
- Utilize partnerships to collectively amplify this brand story for Barton village visitation and attraction.
- Build focused foundational messaging and marketing plans.

RATIONALE

- No clear direction on the current brand story for Barton village.
- Negative perceptions need to be addressed in a consistent positive branded story.
- Allows for easy decision making with brand guidelines and guardrails in place – allowing the BIA staff to focus on program delivery instead of small issues.
- Willing partners such as Westinghouse, hospital, other property owners who want to leverage the Barton Village brand.

DESIRED IMPACT

- One consistent, focused brand story that will attract both investors and local and regional visitation.

HOW IT GETS DONE

- The brand should be flexible enough to allow it to change and evolve over time as the revitalization of the Barton Village BIA takes hold (it should not be a static brand).
- There may be a “master” brand for the BIA with the usage of other brand elements such as how to brand events, programs, parking, etc.
- Potentially take a stronger ownership of the word Barton and turn it to a positive and shorten the title (e.g., The Barton, The Bart, The Bartty, etc.) and drop the term village.
- Work with property owners, brokers, City etc. on providing that liaison service for investment attraction but the BIA is not actively recruiting.



- The BIA can work on one event but the budget and resources do not allow for more than that at this time.

First, a strategic branding exercise needs to be undertaken to determine what the Barton Village BIA retail commercial brand stands for. This would include defining the following:

- What makes Barton Village BIA different, better and special than other commercial districts?
- What do we want Barton Village BIA to stand for in 5 years?
- What the top reasons I should visit, invest and/or live in the area?
- How does this positioning stack up against the competition?
- Who are the key target groups and segments we should focus on with this strategy?
- What results do we collectively want to achieve?

You need to integrate all the local assets into a unique character. Key challenges to achieving that integration to consider in this process include:

- Reflecting the character of each of your unique attributes and offering
- Integrating all elements of these attributes into a singular vision
- Creating engagement across all stakeholder groups
- Aligning key stakeholders to the vision

The effect of distinctive and compelling messaging and an identity will be a well-defined position in the marketplace, one that will set Barton Village BIA apart from the rest of the pack.

Secondly, once the core brand strategy is defined, development of a hierarchy of key messages based on the identified target groups needs to be created. This will create a focus for each group from a communications perspective. And provide a disciplined framework for ensuring message consistency across all touch points

Lastly, a brand identity should be crafted that will define the look and feel of this brand and the tone and manner. Based on the brand identity, a brand toolkit would be created that would include templates for communication elements. This toolkit would be shared by all organizations and sets the stage for a common external brand look and voice.

This will ensure consistent use of the identity positioning and language across applicable media applications.



Toolkits such as these allow organizations to focus on the business of attraction and promotion versus spending their time creating new messaging and marketing on an ongoing basis.

Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Strategic branding exercise	<ul style="list-style-type: none"> Completed brand positioning 	<ul style="list-style-type: none"> The result would be a careful synthesis of strategic thinking about your community, your brand and your targets mapped against your business objectives. As well as consideration for what will be differentiating, engaging and motivating for the future 	<ul style="list-style-type: none"> BIA and partner agency 	<ul style="list-style-type: none"> Immediately
Key Messaging Hierarchy	<ul style="list-style-type: none"> Completed messaging hierarchy 	<ul style="list-style-type: none"> A matrix which links key messages to your Promise, Benefits, and Positioning and expresses your brand position 	BIA	<ul style="list-style-type: none"> Short Term



		<ul style="list-style-type: none"> Individual messages for each of your separate target groups 		
Brand identity creation	<ul style="list-style-type: none"> Brand guidelines 	<ul style="list-style-type: none"> Strategy and partner agency team/creative team develop the new identity (logo, symbols, colour palette etc.) and tagline options based on the approved strategic direction. This would include identity options that link to the identified assets and differentiators of the BIA 	<ul style="list-style-type: none"> BIA and partner agency 	<ul style="list-style-type: none"> Short term
Brand communication toolkit development	<ul style="list-style-type: none"> Toolkit 	<ul style="list-style-type: none"> The agency/creative team creates application guides and templates for brand communication. A document & 	<ul style="list-style-type: none"> BIA and partner agency 	<ul style="list-style-type: none"> Short term



		digital format guide for use by and for all future marketing communications		
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BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS



1.0 Introduction

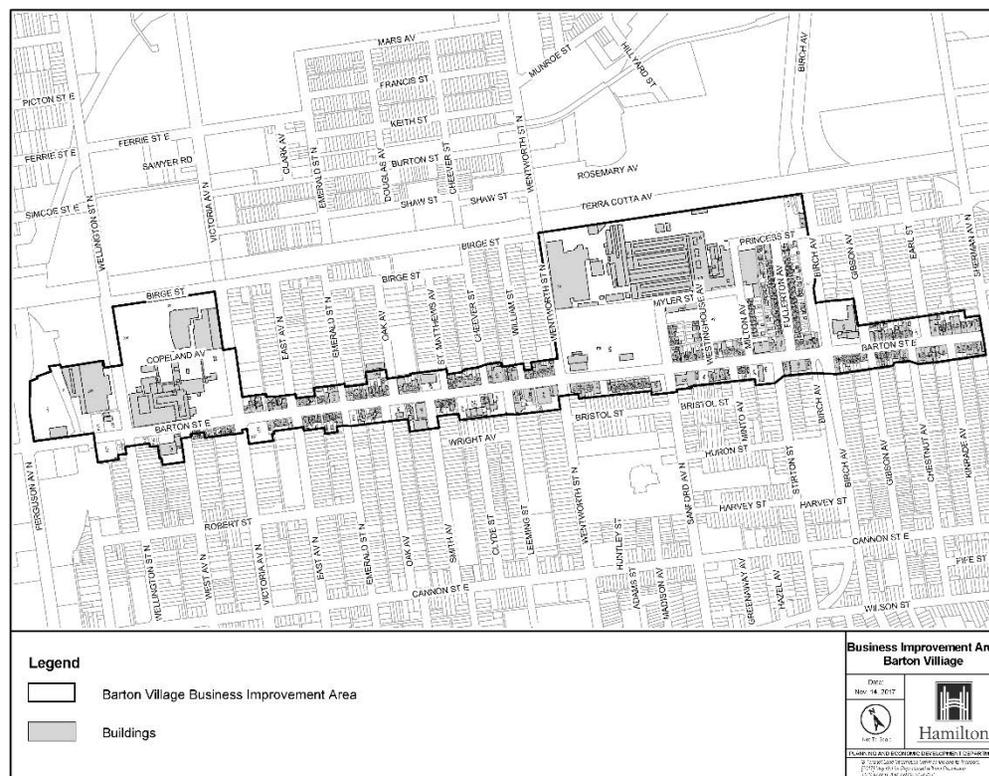
360 Collective was retained by the City of Hamilton (City) and Barton Street Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of Barton Village BIA area completed in 2010/2011. The study process included a thorough review of the demand and supply characteristics of the BIA to inform changes to their internal action plans.

The process included:

- Review of movement into and through the BIA
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and will be reviewed with BIA members at an open workshop.

Barton Village BIA





2.0 Visitors to Barton Village BIA

To understand the commercial market opportunities in Barton Village BIA a review of visitor movement was undertaken. This included five major reviews:

- Vehicular movements along Barton St. E. in the BIA
- On-street parking usage as a proxy for visitation
- Pedestrian intersection volumes and movements
- Observational data
- Key person interviews with retailers and property owners as well as City staff and the local Councillor

2.1 Vehicular and Pedestrian Movement Along Barton St. E.

Vehicular and Pedestrian Volume 8-Hour Counts at Key Intersections along Barton St. E.

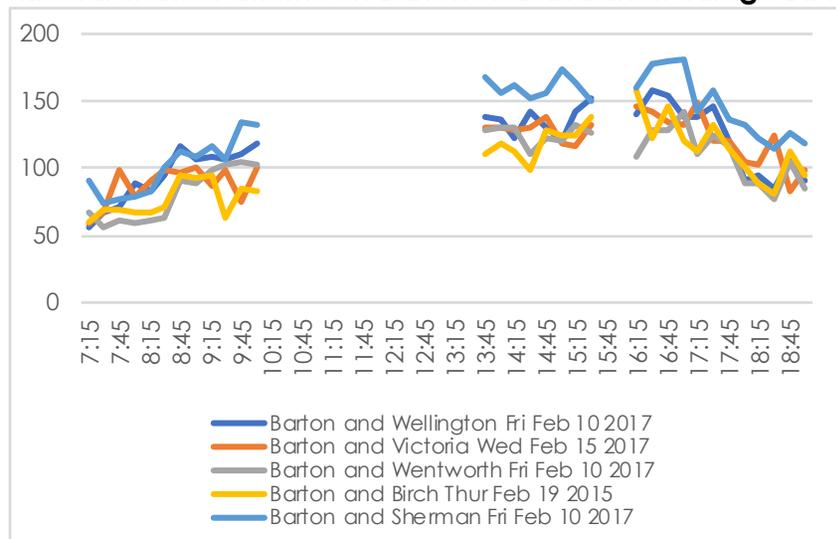
Intersection	Date	8-hour Vehicular Count	8-Hour Pedestrian Count
Barton St. E. and Wellington St.	Fri. Feb. 10 2017	13,172	2,499
Barton St. E. and Victoria Ave.	Wed. Feb. 15 2017	12,134	2,561
Barton St. E. and Wentworth St.	Fri. Feb. 10 2017	11,029	778
Barton St. E. and Birch Ave.	Thur. Feb. 19 2015	8,299	486
Barton St. E. and Sherman Ave.	Fri. Feb. 10 2017	9,842	716

Source: City of Hamilton

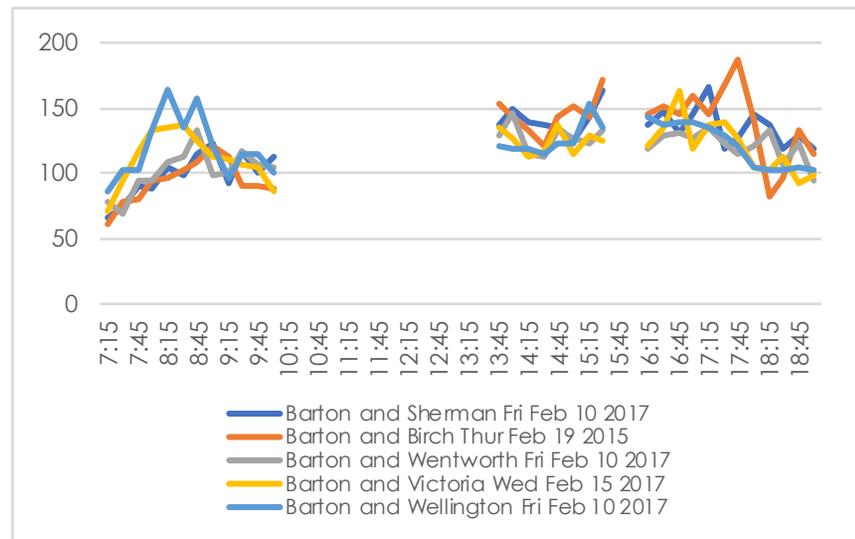
Focusing on movement directly on Barton St. E., the following graph illustrates vehicular traffic eastbound and westbound.



Vehicular Traffic Patterns on Barton St. E. in Barton Village BIA



Eastbound



Westbound

Source: City of Hamilton

Findings for Barton Village BIA

- Eastbound traffic builds throughout the day and peaks in the late afternoon/early evening.
- However, traffic along Barton St. E. does not build from west to east. Traffic is diverted for other activities at major intersections such as Wellington, Victoria, and Wentworth.
- Westbound traffic experiences spikes in the morning and late afternoon/early evening.
- Similar to eastbound patterns, the traffic is diverted for other purposes and activities along the route and it doesn't build.



Implications for Barton Village BIA

- Businesses along Barton St. E. can take advantage of commuter patterns and spikes in visitation. However, they need to draw them in before they are diverted off the street.
- South side of Barton St. E. for commute home traffic should be easy and accessible.



2.2 On-Street Parking

A review of on-street parking meter revenue illustrates the following about past visitation:

On-Street Parking Meter Revenue

Year	Total On-Street Parking Revenue	Number of On-Street Parking Spots	Revenue Per Meter
2012	\$64,722.31	153	\$423
2013	\$62,646.81	153	\$409
2014	\$64,155.86	150	\$428
2015	\$73,810.32	150	\$492
2016	\$78,275.19	152	\$515

Source: City of Hamilton

*Parking rates increased in June 2017 from \$1.00 to \$1.50/hour

Findings

- There is free parking in December.
- Parking revenue per meter can be used as a proxy for visitation. There has been an increase in visitation from 2012 to 2016.
- There was a modest dip in 2013.
- While there is an increase in parking usage along Barton Street in the BIA, the usage is average. It equates to each spot being occupied 2.2 hours per day from January to November (note there is free parking in December).

Implications for Barton Village BIA

- For the totality of the BIA, the hospital and health services along Barton Street do not put an undue stress on parking availability during the day. However, there will be pockets of high usage.
- Increasing parking utilization is a sign of increased visitor traffic to the area beyond the local neighbourhood residents who tend to walk, bike, or take public transit.



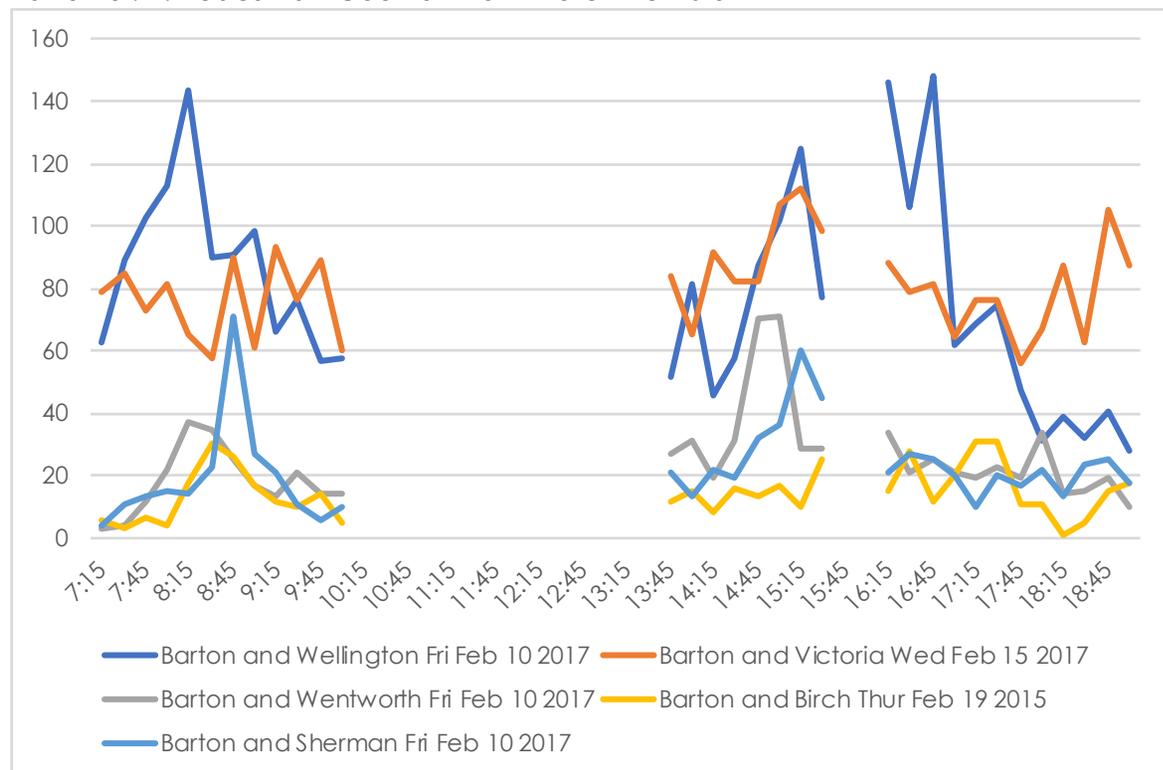
- According to the City of Hamilton, mobile payment for parking and credit card payment at off-street lots should be able to be rolled out in 2018/2019. BIAs should look for increased education and marketing of these services in relation to their customers and visitation. Further advances include on-line payment for permit parking spaces.



2.3 Pedestrian Traffic

Pedestrian traffic along Barton St. E. at five major intersections based on 15-minute intervals.

Barton St. E. Pedestrian Counts – 15 Minute Intervals



Source: City of Hamilton



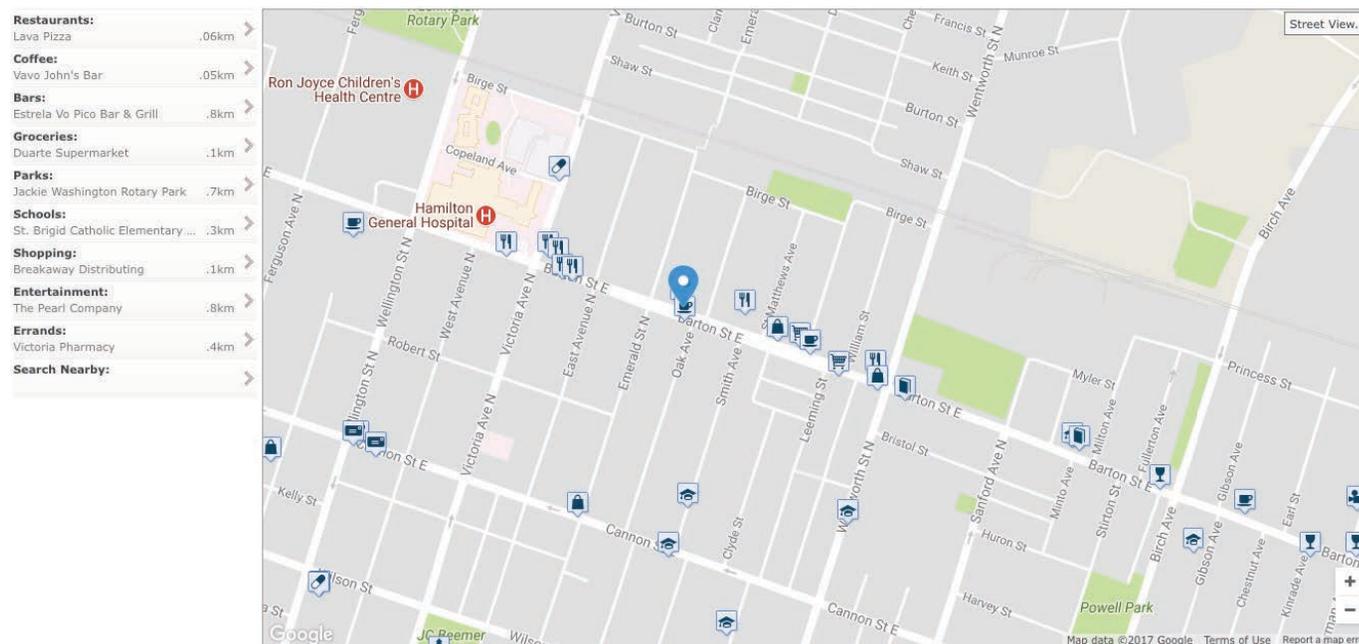
Findings

- There are morning and afternoon commute spikes due to the hospital.
- In addition, there is a morning commute spike at Barton St. E. and Sherman Ave.
- There is continued pedestrian traffic throughout the day and early morning at Barton St. E. and Victoria Ave. This is due to patient visitation. There is a spike in the early afternoon and then a significant late afternoon/early afternoon spike as people go to the hospital after leaving work to visit friends and family.
- Throughout the rest of the day at other intersections along Barton St. E. traffic is relatively low.
- According to Walk Score, the address 359 Barton St. has a Walk Score of 85 and a Transit Score of 58. Barton Street achieves a high Walk Score because it is very accessible to a wide range of goods, services (hospital, health services, library, parks, cafes, restaurants, schools, etc.) by foot. There are some grocery items nearby. However, it is more difficult to access these types of activities via transit.



Barton Village BIA Walk Score – Nearby Amenities

What's Nearby



Implications for Barton Village BIA

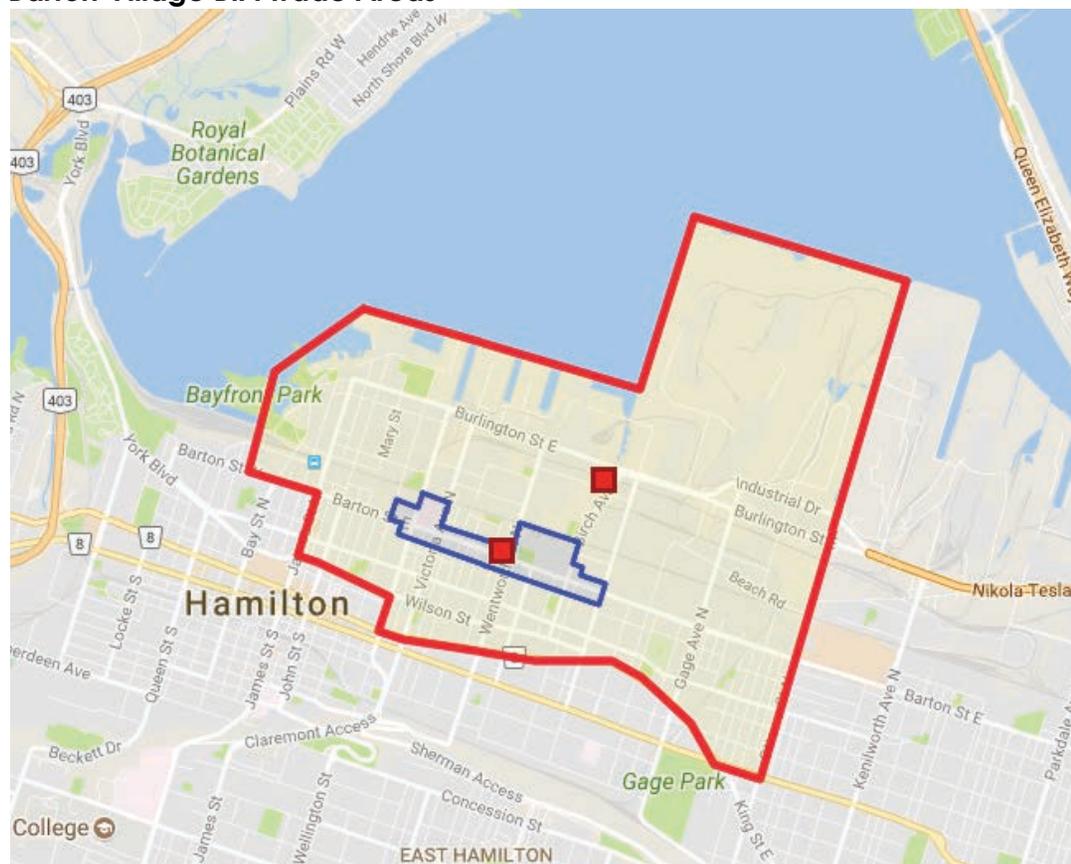
- The length of Barton St. E. within the BIA has been an issue. There needs to be a further sub-district plan based on average walking distances of 800 m.
- The trade area is affected by the rail and industrial lands to the north.



3.0 Trade Area Socio-Economic Review

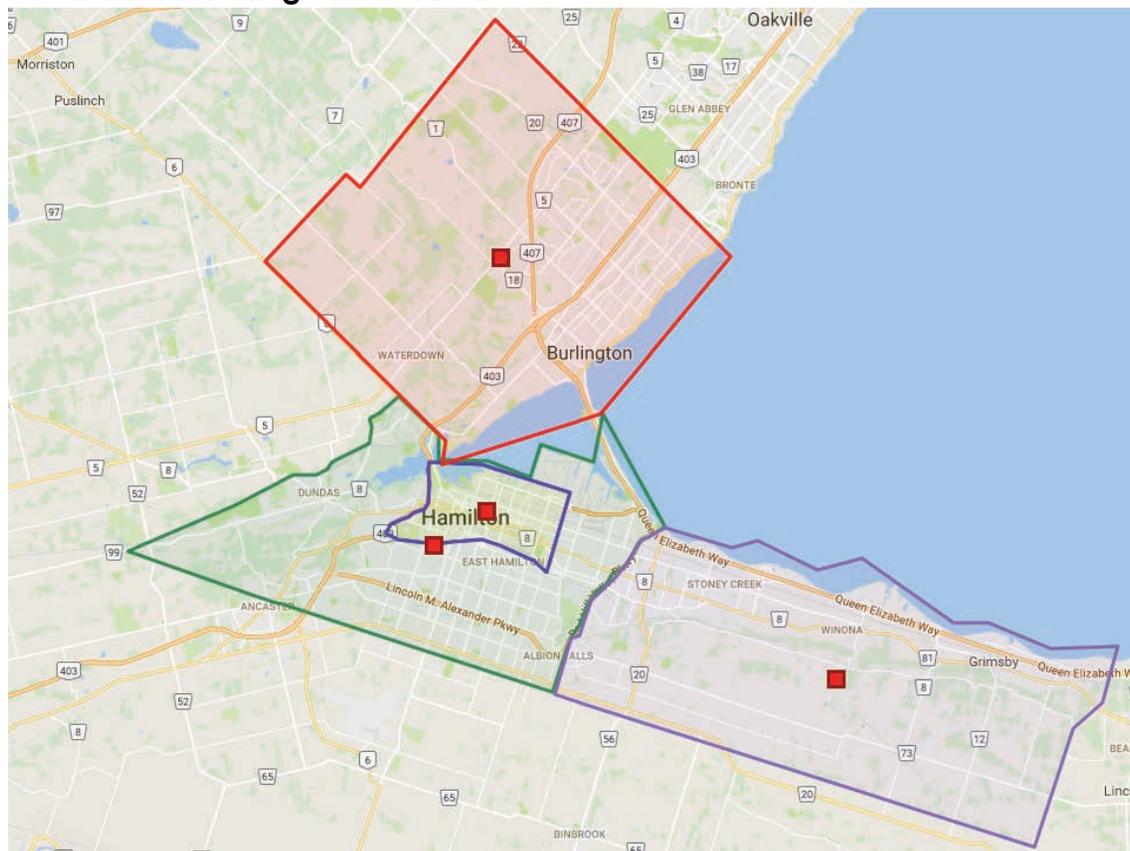
Based on the preceding analysis to determine the relevant trade areas for Barton Village BIA the following analysis assesses key findings based on the socio-economic review.

Barton Village BIA Trade Areas





Greater Barton Village Trade Areas





Trade areas include:

- Barton Village BIA
- North Hamilton: Bay Street to Ottawa Street and Hamilton Harbour to King Street
- Lower City: Hamilton Harbour to the escarpment and Hwy 403 to Ottawa St.
- Secondary Trade Area: Hamilton Mountain, Dundas, Ancaster, and East Hamilton to the Red Hill Parkway
- Stoney Creek/East: Stoney Creek, Winona, Grimsby
- Waterdown/Burlington
- City of Hamilton

Population, Households, and Daytime Workers

	North Hamilton	Lower City	Second- ary Trade Area	Stoney Creek / East	Waterdo wn / Burlingto n	City of Hamilton
2011 Population	33,414	91,430	349,699	127,622	193,432	519,950
2016 Population	35,506	97,416	361,349	136,998	220,832	566,276
Annualized Population Growth Rate	1.2%	1.3%	0.7%	1.4%	2.7%	1.7%
2016 Est. Households	14,043	45,946	152,942	52,305	83,004	229,822
Annualized Household Growth Rate	0.4%	0.6%	0.8%	1.2%	1.4%	0.9%
Daytime Worker Population	16,683	84,495	156,281	59,051	111,633	228,040

Source: Statistics Canada 2011 and 2016

Findings

- The North Hamilton trade area experienced a healthy increase in population from 2011 to 2016.
- Similarly, the Lower City has been transitioning from older households to younger households with smaller household sizes. But the population growth has been positive.
- In the North Hamilton trade area within 10-minute walking distance there is a sizeable population of 35,506 residents.
- The population growth is higher than the household growth rate in the North Hamilton trade area suggesting that new families have moved into the area, have established themselves, and are growing (i.e., having children).



Age Profile, Gender, and Ethnicity

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Water-down / Burlington	City of Hamilton
Age Profile							
0 to 9	12%	12%	10%	10%	11%	11%	10%
10 to 19	11%	12%	9%	11%	12%	12%	11%
20 to 29	16%	16%	18%	14%	12%	11%	14%
30 to 39	13%	15%	16%	13%	12%	13%	12%
40 to 49	12%	12%	12%	13%	13%	14%	15%
50 to 59	15%	16%	15%	16%	15%	15%	14%
60 to 69	13%	10%	11%	11%	13%	11%	10%
70+	8%	7%	9%	12%	12%	13%	12%
Median Age	38.4	36.8	38.6	41.6	42.5	42.7	41.6
Gender							
Male	50%	51%	50%	49%	49%	48%	49%
Female	50%	49%	50%	51%	51%	52%	51%
Ethnicity							
Visible Minority	20%	22%	24%	21%	16%	15%	19%
1st Generation Canadian	26%	26%	28%	27%	24%	26%	26%
2nd Generation Canadian	24%	22%	23%	25%	26%	25%	25%
3rd Generation Canadian +	50%	52%	50%	49%	50%	49%	49%

Source: Statistics Canada 2016

Findings

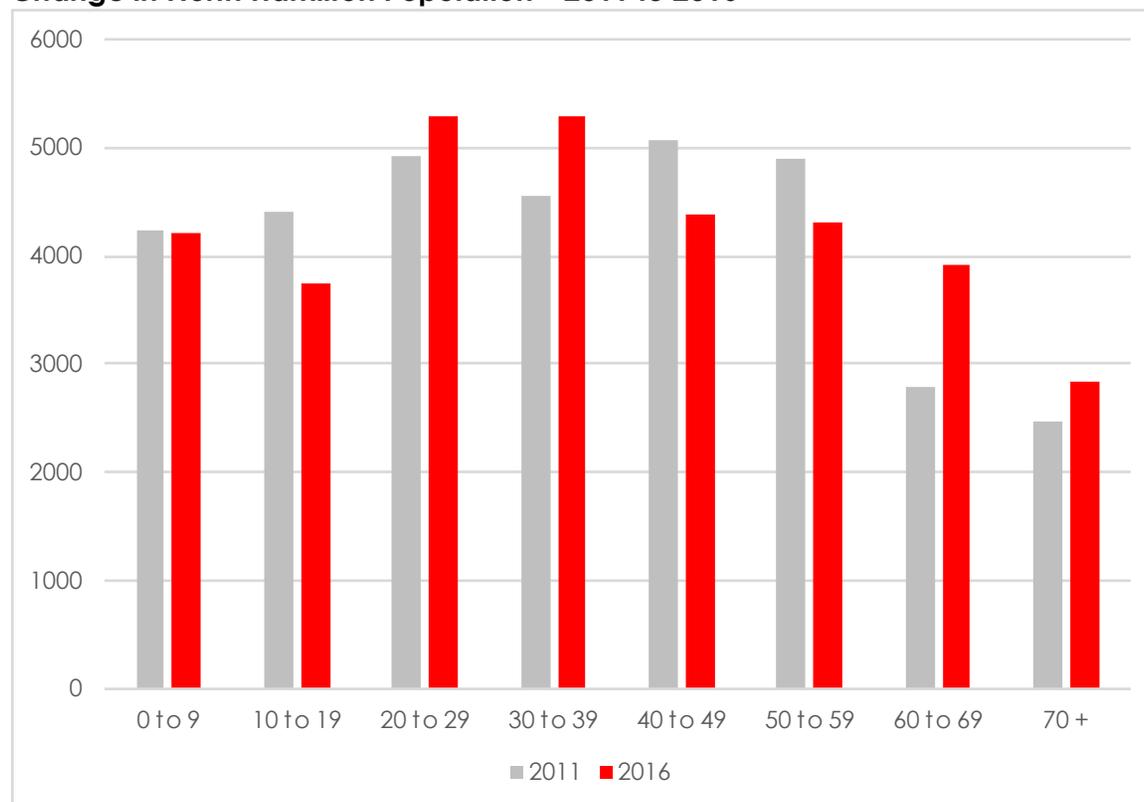
- In North Hamilton Trade Area, there is a very young age profile. 24% of the population is under 20 years of age. There is a high proportion of young adults from 20 to 39 years of age.
- Within the Lower City Trade Area, similarly there is a high proportion of young adults. There is a large number of children but proportionately it is less than other trade areas.



- The proportion of the population that is visible minority is similar to the City of Hamilton. There is a similar proportion of first generation Canadians living in the area. There is not a significant inflow of newer Canadians living in these trade areas near to Barton Village.



Change in North Hamilton Population – 2011 to 2016



Source: Statistics Canada 2011 2016

Findings

- There is growth in the number of young adults from 20 to 39 years of age as well as active seniors from 60 to 69 years of age.
- The number of young children has remained unchanged.
- The new families moving into the area are smaller in size and have replaced larger multi-generational families.



Household Size and Marital Status

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Household Size							
1 Person	34%	34%	46%	32%	23%	24%	28%
2 Person	26%	31%	29%	32%	33%	34%	32%
3 Person	18%	16%	12%	15%	17%	17%	16%
4 + Person	18%	21%	13%	21%	27%	26%	24%
Person Per Household	2.4	2.4	2.0	2.4	2.6	2.6	2.5
Marital Status							
Single	42%	38%	38%	31%	25%	24%	29%
Married, Common Law	40%	44%	42%	51%	60%	61%	55%
Separated, Divorced, Widowed	18%	18%	20%	18%	15%	15%	16%

Source: Statistics Canada 2016

Findings

- In the North Hamilton trade area, there is a high proportion of one-person households. This is due to the slightly higher proportion of single persons as well as separated, divorced, and widowed residents. However, it is not as high as elsewhere in the Lower City.
- The number of people per household is relatively high due to households with multi-generational family members living together.



Education, Occupation, and Home Ownership

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Education							
Less than High School	35.0%	34.0%	24.0%	21.0%	20.0%	12.0%	20.0%
High School Graduate	23.0%	30.0%	27.0%	28.0%	29.0%	26.0%	28.0%
College, Diploma	32.0%	25.0%	26.0%	28.0%	31.0%	29.0%	30.0%
University Graduate	10.0%	11.0%	23.0%	23.0%	20.0%	33.0%	22.0%
Occupation							
Management	20%	17%	19%	22%	26%	32%	24%
Science	3%	4%	5%	5%	5%	8%	6%
Health	5%	6%	8%	8%	7%	6%	8%
Govt, Ed., Social Services	3%	7%	12%	12%	11%	13%	12%
Arts, Culture, Recreation	1%	2%	4%	3%	2%	3%	3%
Sales and Service	32%	29%	26%	25%	23%	23%	24%
Other	30%	30%	23%	21%	25%	13%	23%
Labour Force Participation	59%	57%	61%	62%	64%	69%	64%
Housing Tenure							
Own	47%	49%	37%	62%	75%	77%	68%
Rent	53%	51%	63%	38%	25%	23%	32%

Source: Statistics Canada, Environics Estimates 2017

Findings

- There is a mixed range of occupations including a higher proportion who work in the manufacturing, transport, trades, and utilities sectors as well as sales and service type occupations. However, there is a sizeable proportion of the working population that works in management and administration. However, overall the labour force participation rate is low.
- There is an even split between those who rent and those who own their homes.



Travel to Work

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Travel to Work							
Vehicle - Driver or Passenger	70%	66%	62%	79%	91%	87%	83%
Public Transit	26%	21%	22%	14%	5%	9%	10%
Walk	8%	10%	13%	6%	3%	3%	5%
Bike	4%	2%	3%	1%	0%	1%	1%
Other	0%	1%	1%	1%	1%	1%	1%

Source: Statistics Canada, Environics Estimates 2017

Findings

- Two-thirds of North Hamilton trade area residents drive or are driven to work.
- Fewer residents walk to work who live in the local area compared to elsewhere in the Lower City.
- Residents are very reliant on public transportation.



Household Income

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Household Income							
< \$20,000	21%	18%	24%	13%	11%	5%	9%
\$20,000 to \$39,999	33%	28%	25%	20%	15%	12%	17%
\$40,000 to \$59,999	21%	20%	18%	17%	16%	12%	16%
\$60,000 to \$79,999	10%	1%	12%	13%	14%	12%	13%
\$80,000 to \$99,999	6%	9%	8%	14%	12%	12%	11%
\$100,000 to \$149,999	12%	9%	9%	15%	21%	21%	18%
\$150,000 to \$200,000	2%	2%	3%	7%	10%	12%	8%
\$200,000 +	1%	1%	2%	5%	6%	13%	6%
Average Household Income	\$40,930	\$53,040	\$55,273	\$79,754	\$93,780	\$119,917	\$88,151
Real Annualized Growth in Household Income	0.7%	0.1%	0.9%	0.8%	0.8%	0.7%	1.0%

Source: Statistics Canada, Environics Estimates 2017

Findings

- Average household income in the North Hamilton trade area is similar to the Lower City. However, there are fewer high income households and fewer very low-income households.
- There is not a significant movement in the real growth of average household incomes excluding inflation from 2011 to 2017. However, throughout the Lower City, there have been more substantial changes in the composition of the households and higher average household incomes in terms of real growth in incomes.



3.1 New Residential, Employment and Amenity Type Developments

Development projects include:

- Gibson School site for mixed use residential (90 units)
- Westinghouse industrial site
- Ron Joyce Children's Hospital (completed)

In addition, there are four properties that are currently in the process of redeveloping.

There is some modest momentum in terms of investment, redevelopment that extends into the private sector. The hospitals have invested and expanded in recent years.

See section 7.0 on development applications and impact of investment in Barton Village BIA.



3.2 Household Expenditure

Household Expenditure

	Barton Village BIA	North Hamilton	Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Local Serving Retail							
Food Purchased from Stores	\$5,444	\$6,000	\$5,429	\$7,493	\$8,929	\$9,720	\$8,231
Alcohol Purchased from Stores	\$1,060	\$979	\$477	\$547	\$564	\$803	\$583
Health Care Related Retail	\$1,749	\$1,918	\$1,909	\$2,520	\$2,923	\$3,354	\$2,737
Food Services							
Restaurant dinners	\$1,253	\$1,384	\$1,521	\$2,000	\$2,258	\$2,868	\$2,190
Restaurant lunches	\$567	\$656	\$733	\$981	\$1,126	\$1,404	\$1,080
Restaurant breakfasts	\$232	\$259	\$281	\$349	\$388	\$467	\$374
Restaurant snacks and beverages	\$436	\$478	\$479	\$567	\$608	\$732	\$600
Alcohol Serviced on Premises	\$383	\$373	\$1,021	\$1,344	\$1,474	\$1,862	\$1,447
Retail Merchandise							
Women's Clothing and Accessories	\$1,014	\$1,192	\$1,184	\$1,715	\$1,989	\$2,542	\$1,898
Men's Clothing and Accessories	\$622	\$753	\$735	\$1,011	\$1,145	\$1,406	\$1,109
Children's Clothing and Accessories	\$68	\$80	\$54	\$57	\$60	\$61	\$61
Clothing as Gifts	\$376	\$404	\$426	\$547	\$614	\$710	\$586
Home Furnishings	\$54	\$709	\$821	\$1,042	\$1,220	\$1,697	\$1,184
Appliances and Electronics	\$552	\$425	\$449	\$505	\$527	\$595	\$545
Leisure Retail (Sporting Good, Books, Music)	\$662	\$503	\$502	\$611	\$664	\$808	\$667
Pet Supplies	\$317	\$299	\$269	\$345	\$413	\$472	\$391
Florist, Nursery, Greenhouse Stock	\$174	\$156	\$136	\$221	\$284	\$341	\$258
Home Improvement Retail	\$100	\$89	\$84	\$153	\$226	\$249	\$195
Services							



Packaged Travel	\$144	\$118	\$160	\$298	\$395	\$492	\$368
Clothing - Laundromat, Dry Cleaning, Tailor	\$93	\$103	\$17	\$22	\$25	\$28	\$24
Recreation Memberships	\$147	\$121	\$157	\$253	\$278	\$377	\$289
Movies	\$76	\$56	\$55	\$57	\$54	\$61	\$60
Live Sporting Events	\$5	\$10	\$16	\$22	\$21	\$28	\$23
Live Performing Arts	\$19	\$26	\$44	\$74	\$98	\$105	\$89
Personal Care Services	\$339	\$395	\$426	\$625	\$758	\$971	\$705

Source: Statistics Canada, Environics Estimates 2017



Findings

Household members in the North Hamilton trade area spend a higher proportion of their budget on (13 top ranked goods and services):

- Movies
- Children's clothing and accessories
- Snacks and beverages
- Appliances and electronics
- Pet food and supplies
- Leisure retail (sporting goods, books, music)
- Health related retail
- Clothing as gifts
- Breakfast
- Men's clothing and accessories
- Alcohol purchased from stores
- Alcohol served on premises
- Dinner

Implications for Barton Village BIA

- Household members like to go out and have a good time including movies, dinner, drinking, cafes
- There is a focus on health and wellness.
- Home is important in terms of home entertainment and video games, pet food and supplies, and some leisure related goods.



3.3 Other Major Target Markets and Customer Visitation

Within the BIA, there are other target markets for retail and commercial businesses to capitalize upon:

- Hamilton General Hospital
- Ron Joyce Children's Health Centre
- Hamilton Health Sciences Regional Rehabilitation Centre
- David Braley Research Institute
- Major and minor manufacturing and office employment such as Empire Steel, Bombardier
- Wholesale distributors
- Hamilton Library

Hamilton General Hospital

- Services 2.3 million residents in South Centre region of Ontario
- 4,600 staff
- 417 beds
- 17,126 inpatients
- 47,000 emergency visits
- 72,760 outpatient visits

Key Findings

- Employment as measured within the Barton Village BIA boundary is substantial. There are over 5,600 workers in Barton Village. The majority of those are associated with institutions including health services.
- Overall, employment has been increasing from 2013 to 2016.
- Within the Barton Village Primary Trade Area there are 19,300 workers (Source: Statistics Canada, Environics Estimates) including the 5,600 workers in the BIA. There is a substantial base of workers to support local retail.
- Employment associated with retail is relatively low.



Barton Village BIA Employment

Employment Sector	2013	2014	2015	2016
Institutional	4,131	4,588	4,821	5,090
Shopping, Services, Repairs, Servicing and Rentals	162	188	244	265
Office	48	84	151	165
Manufacturing, Resource	4	4	87	80
Residential	0	24	72	30
No Perceived Activity (vacant)	0	3	0	0
Terminal, Storage, Transport, Communications	20	30	0	0
Entertainment and Recreation	2	7	0	0
Total	4,369	4,928	5,375	5,630

Source: 2017-11-25 data extracted from HAMCIPA_2021EMP Database

The findings highlight the major employment activities by the existing geographic Barton Village BIA boundaries within the City of Hamilton for 2013 to 2016. It is important to note the results achieved reflect those businesses identified and who participated in the City of Hamilton's annual employment survey. The methodology and data capture of the employment survey, at best, attempts to obtain the number of jobs by business location and has no relationship to STATSCAN data.

Implications for Barton Village BIA

- The health-related workers (Institutional) and the office-based employment can contribute significantly to eating establishment and food service sales. There are food services located within Hamilton General Hospital. However, a conservative estimate of \$1,500 annual expenditure for health-based workers would equate to \$7.9 million in food service sales. A 35% capture rate translates into \$2.9 million in food service sales for local businesses.

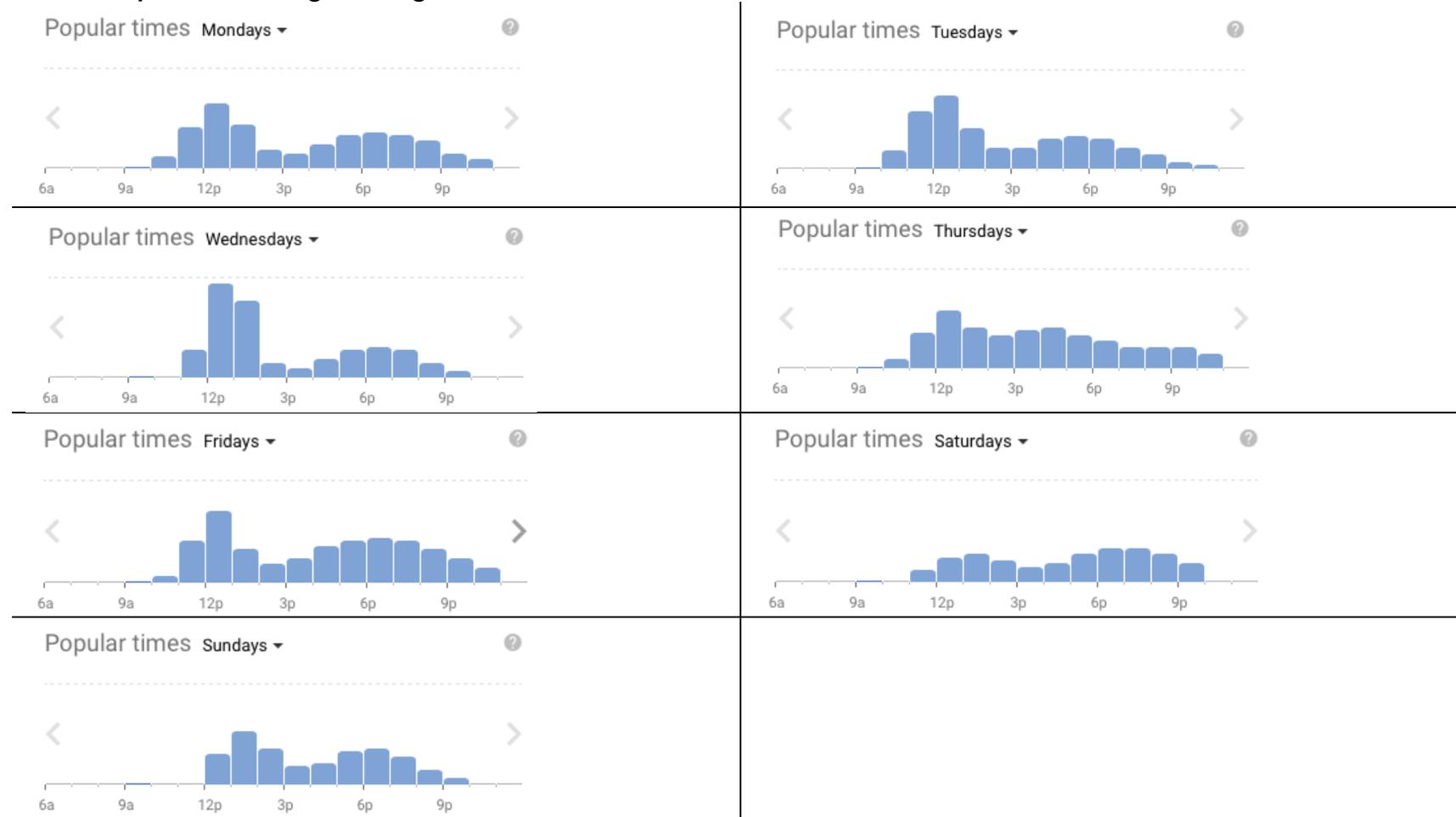


3.4 Customer Visitation Data

Customer Flow Times

The following graphs illustrate customer visitation at select Barton Village BIA businesses.

La Luna Express: 4.3 Google Rating





O'Cantinho, 4.3 Google Rating

Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾

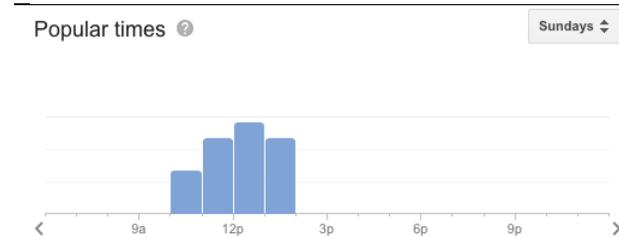
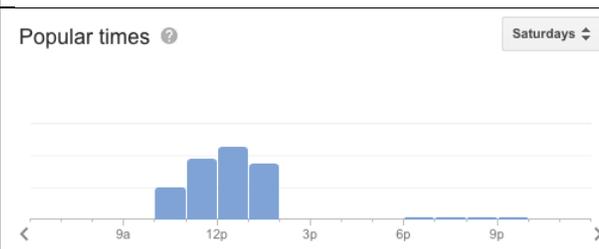
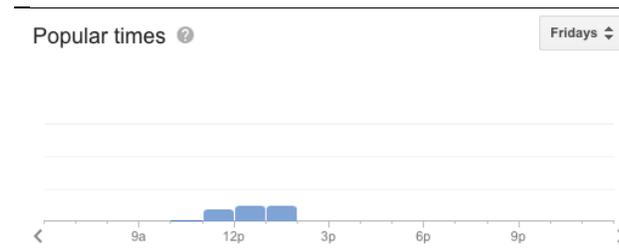
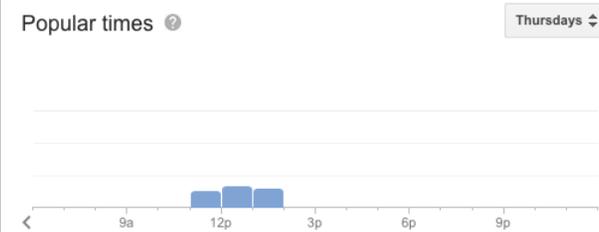
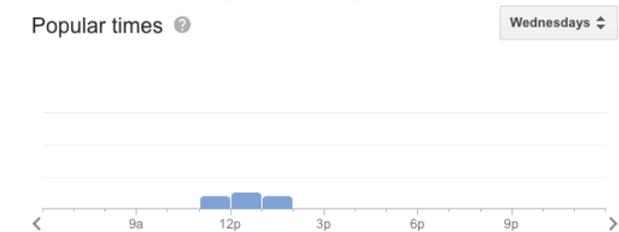


Popular times Sundays ▾





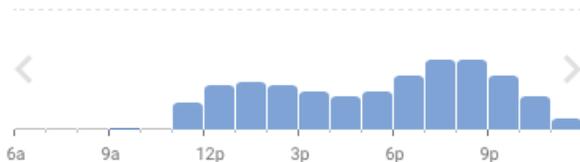
Motel, 4.7 Google Rating





Lava Pizza: 4.0 Google Rating

Popular times Mondays ▾



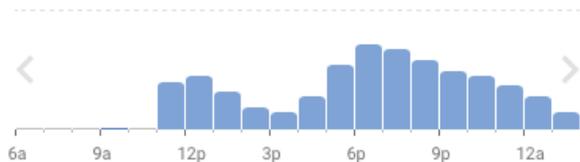
Popular times Tuesdays ▾



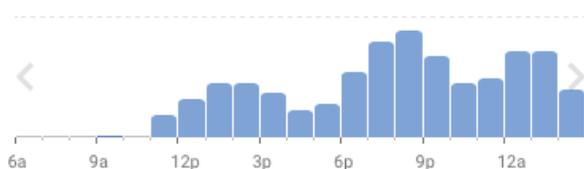
Popular times Wednesdays ▾



Popular times Thursdays ▾



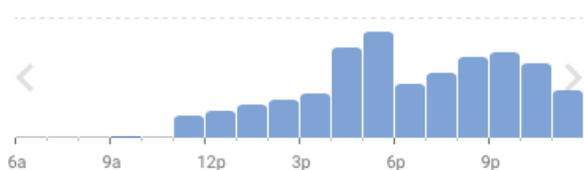
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾





Baca Yard Bar and Grill: 3.6 Google Rating

Popular times ?

Mondays



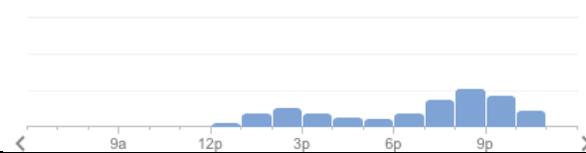
Popular times ?

Tuesdays



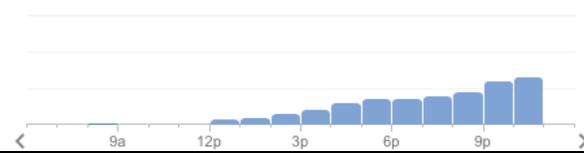
Popular times ?

Wednesdays



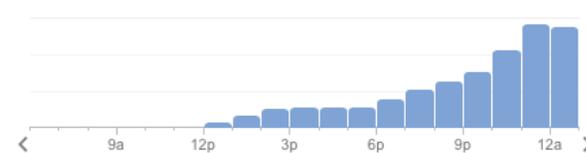
Popular times ?

Thursdays



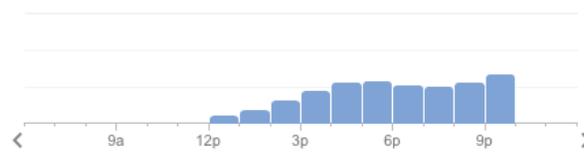
Popular times ?

Fridays



Popular times ?

Saturdays



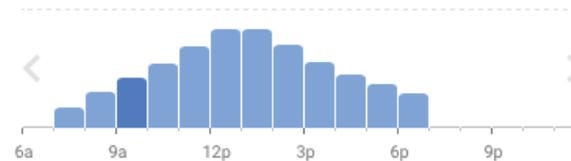


541 Eatery: 4.6 Google Rating

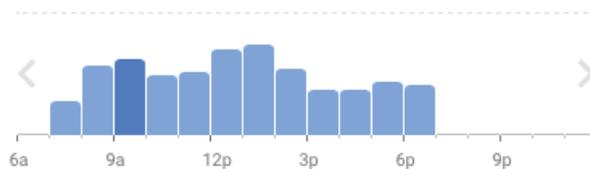
Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



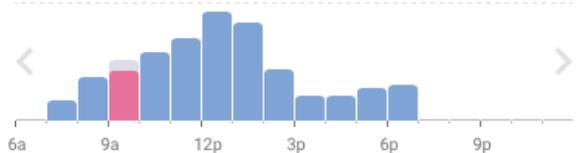
Popular times Thursdays ▾



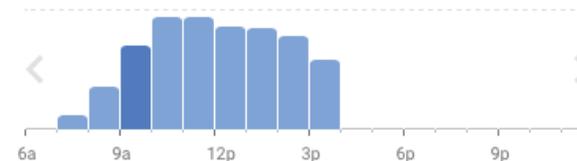
Popular times Fridays ▾



LIVE Not too busy



Popular times Saturdays ▾





Duarte Supermarket: 4.7 Google Rating

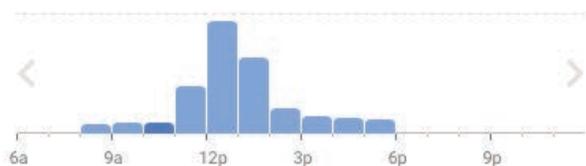
Popular times Mondays ?



Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?





Findings

- There are a range of food services in Barton Village BIA.
- Weekday lunch and some early evening eating establishments such as Duarte Supermarket, 541 Eatery, and La Luna Express cater to local workers and weekday residents. These businesses are busier during the weekday and tend to be less busy on weekends.
- Breakfast and lunch eating establishments that are busy weekdays and weekends. 541 Eatery is busy throughout the week during the day time. They are able to capitalize upon two eating periods in order to increase business sales.
- Weekend brunch locations such as Motel are less busy during the week but have a large spike in weekend brunch visitation.
- There are late afternoon, early evening, and late evening eating establishments that cater to the entertainment crowd. This includes Lava Pizza, Baca Bar and Grill, and O'Cantinho.



4.0 Quality of Life Statistics – Housing Prices

4.1 Housing Prices

As of October 2017, housing prices in Hamilton Centre increased a significant 20.8% from 2016 to 2017. Average house prices increased from \$285,268 to \$344,571. From 2012 to October 2017, average prices increased at an annualized rate of 16.3%. This illustrates the sought-after benefits of living in Hamilton Centre including near Barton Village BIA and the importance of having a well-functioning, attractive, and people gathering focused competitive and complementary main street for nearby residents and quality of life attributes.

Hamilton Centre Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$161,799	
2013	\$177,044	9.4%
2014	\$202,011	14.1%
2015	\$235,488	16.6%
2016	\$285,268	21.1%
2017 Oct YTD	\$344,571	20.8%

Source: Realtors' Association of Hamilton and Burlington



5.0 Barton Village Website Audit

Background and Methodology

The Barton Village BIA website was assessed for five different areas to determine how well the site displays and provides information to its target markets. Each of the five areas was assessed for a number of specific criteria such as search tools, menu choices, etc. Some criteria can represent more than one area; however, each criterion was used only once. For example, an events/calendar could be placed under *functionality* or under *content*.

The five areas assessed were:

1. Functionality – ease of navigation: menu, site search, events/calendar etc.
2. Content and Purpose – based on target user; reviews product, educational, and editorial information, brand story, image quality and management, information, education, clarification of services, directory, etc.
3. Innovation and Interactivity – social networking presence, use for educational purposes, promotions, video, mobile accessibility and optimization etc.
4. Visual Design - appeals to the target market and is professional in design
5. Optimization and AODA Compliance

The audit was conducted from the following target user perspectives and rated on a 5-star scale, based on available content:

- Visitors
- Businesses
- Investors
- City and other Partnerships (e.g. residents, City of Hamilton, Provincial and Federal government, etc.)

Nature of Findings

The audit completed is qualitative in nature. Although consistencies and logic lend confidence to the analysis and interpretations, this research must be viewed as directional in nature rather than definitive.



Detailed Findings

The website was assessed for the following six areas. A mark of Poor-Basic-Good-Very Good-Excellent was provided. An overall rating out of 5 ★ stars was also provided.

Rating of Key Areas of Barton Village BIA Website

Area Reviewed	Barton Village ★★★★
Functionality	Excellent
Content & Purpose	Very Good
Innovation and Interactivity	Very Good
Visual Design	Very Good
Mobile Optimized	Excellent
Accessibility Compliance	62/300+

However, there is not a strong brand for Barton Village BIA. That is reflective in the website.



The table below notes the type of **CONTENT** provided in the website:

Content Provided in BIA Websites (√ means it is addressed on the website)

Content Provided	Barton Village
News/Blog & Events	√
History	√
Gallery	√
Directory	√
Business /Investor	√
Member Information	√
Buy/Sell/Rent Properties	√
Testimonials	√
Mission Statement / About Us	√
Contact Us/ Media	√
Member benefits	√
Member portal/login	Login available

AODA Compliance

It is very rare that a website is fully AODA compliant and this website does have some issues with AODA compliance. The numbers indicated in Table 2A – *Accessibility Compliance* illustrate the Known problems/Potential problems based on international accessibility guidelines. The most common issue seen amongst most sites is not having a descriptive tag or text alternatives for any non-text content (e.g. images, video).

1. **Known problems** These are problems that have been identified with certainty as accessibility barriers with an automated web checker.
2. **Likely problems:** These are problems that have been identified as probable barriers, but require a human to make a decision



Barton Village BIA Website Summary

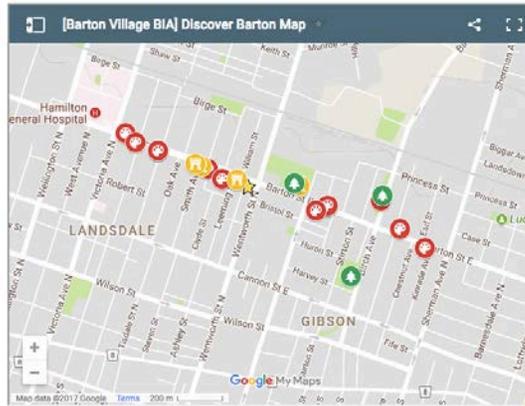
The Barton Village BIA website follows a modern website design and layout which makes access to information on the site simpler. Good use of creativity makes specific areas of the site stand out such as its focus on businesses related to: arts, entertainment, food/drink, shopping/services, professional businesses and living. There is a Google Maps link with many of the businesses tagged and categorized for easy navigation. The Art on Barton section features the unique aspects of Barton Village through locations and images of street murals painted in the city.

The site is mobile optimized which is key given the large numbers of Canadian mobile users. The target of the website is a mix of businesses, members, visitors, investors and potential partners. It includes a newsletter signup and is very active on Instagram, with presence on other social media platforms as well. Currently the retail section of the Shops & Services section doesn't have a working link.

An additional consideration is the branded message within the materials.



Discover Murals on Barton



Have you ever notice the pieces of art when you are walking down on Barton? Check out our Discover Barton Village Map to get to know the stories behind the murals on Barton.

[DISCOVER BARTON MAP](#)

Murals feature as part of the Website



[Barton Village BIA] Bus... 🔍

Barton Village Business Improvement
852 views
SHARE

- Barton Village BIA
 - ★ Barton Village BIA
- Automotive
 - 🚗 A&C Car Sales
 - 🚗 Dardan Auto Sales and Service
 - 🚗 Nick's Auto Service
 - 🚗 Oakland Auto body
 - 🚗 Round and Around Tire
 - 🚗 Steeltown Auto Sales
 - 🚗 T & R Auto Service Inc.
- Beauty
 - 💅 Aesthetics by Claire and Cindy
 - 💅 DL Salon
 - 💅 Honey Bee Esthetics
 - 💅 Transitions Hair Design

Directory and Mapping of Businesses



Conclusion

The Barton Village BIA website has clearly thought through its online website. It provides a great visual presence online with excellent imagery and content. The key area where the site can improve is with the AODA compliance. Ensuring that images used on the website have alternative text describing the image (e.g. html's alt attribute) is one example of improving the site for AODA compliance. Moving forward from this process, the website and marketing materials should reflect an updated brand/identity and positioning.



6.0 Commercial Audit and Rent Review

An audit of the commercial businesses in Barton Village BIA was conducted in November 2017. Ground floor and easily accessible businesses were included in the audit. Each business was noted for its name, address, business type according to NAICS, and estimated size (in square feet).

Barton Village BIA Commercial Business Audit – 2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	2	1.3%	3,200	1.4%
Furniture and Home Furnishings	1	0.6%	3,000	1.3%
Electronics and Appliance Stores	9	5.8%	13,100	5.6%
Building Supply and Garden Equipment	1	0.6%	4,000	1.7%
General Merchandise	2	1.3%	1,100	0.5%
Sporting Goods, Hobby, Book, Music	3	1.9%	2,800	1.2%
Used Merchandise	6	3.9%	7,250	3.1%
Other Retail	7	4.5%	12,050	5.2%
Total Retail	31	20.1%	46,500	20.0%
Food/Drug Retail				
Food and Beverage Stores	12	7.8%	23,400	10.0%
Health and Personal Care Stores	5	3.2%	8,300	3.6%
Total Food/Drug Retail	17	11.0%	31,700	13.6%
Food Services	25	16.2%	26,400	11.3%
Services				
Personal Services	7	4.5%	14,300	6.1%
Personal Services - Beauty	5	3.2%	5,400	2.3%
Financial Services	1	0.6%	1,800	0.8%
Medical Services	5	3.2%	9,400	4.0%
Professional Services	6	3.9%	11,700	5.0%
Recreation Services	0	0.0%	0	0.0%
Other Services	17	11.0%	23,050	9.9%



Total Services	41	26.6%	65,650	28.2%
Total Occupied	114	74.0%	170,250	73.0%
Vacant	35	22.7%	51,110	21.9%
Redevelopment Sites	5	3.2%	11,700	5.0%
Total	154	100.0%	233,060	100.0%

Source: 360 Collective

The audit excludes the large office complex at 20 Myler St. There are several vacant units in the complex accounting for over 90,000 sq. ft..



Barton Village BIA Commercial Business Audit

	2017				2010			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise								
Clothing and Accessories	2	1.3%	3,200	1.4%	5	3.3%	11,600	4.7%
Furniture and Home Furnishings	1	0.6%	3,000	1.3%	4	2.6%	8,800	3.5%
Electronics and Appliance Stores	9	5.8%	13,100	5.6%	3	2.0%	4,200	1.7%
Building Supply and Garden Equipment	1	0.6%	4,000	1.7%	2	1.3%	4,800	1.9%
General Merchandise	2	1.3%	1,100	0.5%	2	1.3%	1,300	0.5%
Sporting Goods, Hobby, Book, Music	3	1.9%	2,800	1.2%	6	3.9%	7,000	2.8%
Used Merchandise	6	3.9%	7,250	3.1%	11	7.2%	14,300	5.8%
Other Retail	7	4.5%	12,050	5.2%	1	0.7%	2,000	0.8%
Total Retail	31	20.1%	46,500	20.0%	34	22.4%	54,000	21.8%
Food/Drug Retail								
Food and Beverage Stores	12	7.8%	23,400	10.0%	12	7.9%	21,400	8.6%
Health and Personal Care Stores	5	3.2%	8,300	3.6%	5	3.3%	12,300	5.0%
Total Food/Drug Retail	17	11.0%	31,700	13.6%	17	11.2%	33,700	13.6%
Food Services	25	16.2%	26,400	11.3%	22	14.5%	42,200	17.0%
Services								
Personal Services	7	4.5%	14,300	6.1%	7	4.6%	16,200	6.5%
Personal Services - Beauty	5	3.2%	5,400	2.3%	8	5.3%	8,800	3.5%
Financial Services	1	0.6%	1,800	0.8%	2	1.3%	6,500	2.6%
Medical Services	5	3.2%	9,400	4.0%	2	1.3%	2,400	1.0%
Professional Services	6	3.9%	11,700	5.0%	7	4.6%	13,200	5.3%
Recreation Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Other Services	17	11.0%	23,050	9.9%	10	6.6%	15,150	6.1%
Total Services	41	26.6%	65,650	28.2%	36	23.7%	62,250	25.1%
Total Occupied	114	74.0%	170,250	73.0%	109	71.7%	192,150	77.5%
Vacant	35	22.7%	51,110	21.9%	42	27.6%	53,850	21.7%
Redevelopment Sites	5	3.2%	11,700	5.0%	1	0.7%	2,000	0.8%



Total	154	100.0%	233,060	100.0%	152	100.0%	248,000	100.0%
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Source: 360 Collective

Findings

There is approximately 233,000 sq. ft. of commercial businesses in Barton Village BIA which is a medium sized commercial main street.

- There are 154 different businesses. The average size of each business is 1,513 sq. ft.
- Services is the largest category. Services account for 28% of the total square footage. This includes both business services, professional services, medical services, automotive, beauty, and personal services.
- Retail merchandise accounts for 20% of the total square footage. There is a large number of used merchandise stores as well as other retail such as party supply, e-vapor, etc. There has been a significant increase in the number of electronics and computer related businesses.
- Local neighbourhood serving food, grocery, specialty food, and drug store and health related goods are well represented and account for 10% of the total square footage.
- There are more food services than in 2010 but the total square footage has declined. This is the direct result of a number of banquet facilities closing on the street.
- Services account for 28% of the total square footage and social services (included in Other Services) accounts for a significant proportion of that (10%).
- Vacancy remains a concern. 22% of the total square footage is vacant. There are fewer vacancies than in 2010.
- Added to the vacancy concern is the high number of what appears to be commercial spaces that have been converted to residential. Compared to 2010, some of these “converted” units have been reverted back to commercial but at the same time, other former commercial units are now converted to residential.

Changes since 2010

- There is slightly less space. Commercial buildings at Barton St. E. and Wellington St. N. have been demolished.
- Generally, the mix has remained the same as in 2010 except there is a smaller amount of food services and more personal and professional services. There are more smaller scale food services compared to the larger banquet halls and pubs of the past.
- Vacancy has remained the same in terms of total square footage but the number of vacancies has reduced. This is in part due to some larger vacant units such as empty banquet halls which are no longer in demand on Barton St. E.

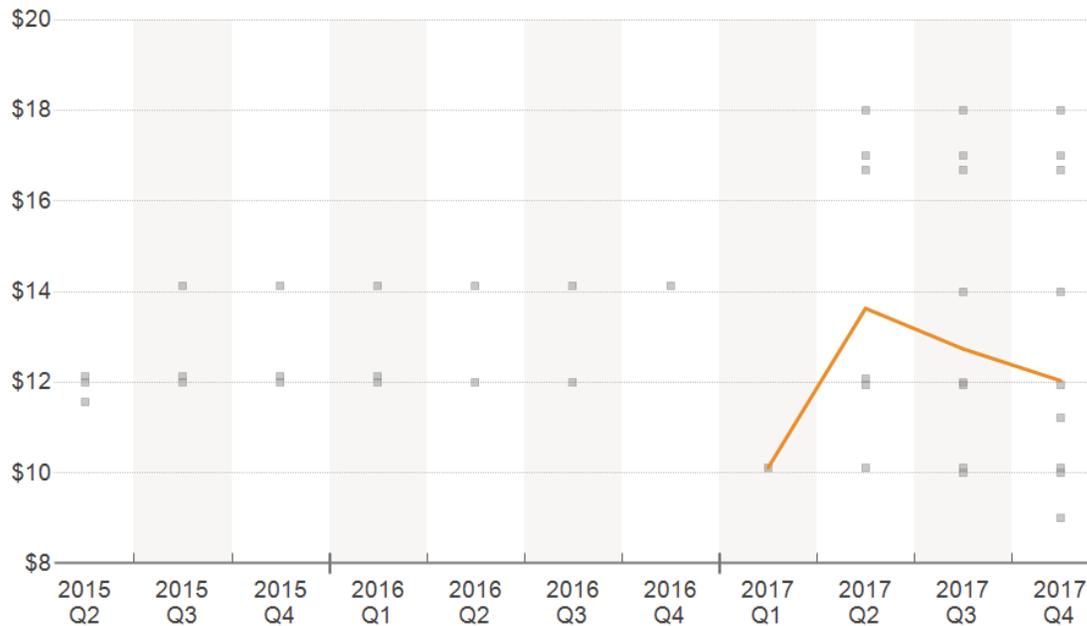


6.1 Rent and Land Value Analysis

Net Rent Analysis

The following graph illustrates a sample of primarily net rents for Barton Village BIA within the BIA. In addition, it excluded retail units larger than 10,000 sq. ft. as these units tend to lease at a lower rate. This is the best way to compare like for like retail units.

Net Rents (< 10,000 Sq. Ft.)



Findings Net Rent Analysis

- Rents vary from single digit to \$18/sq. ft.
- In 2017, there are more properties pushing rents to that higher benchmark.

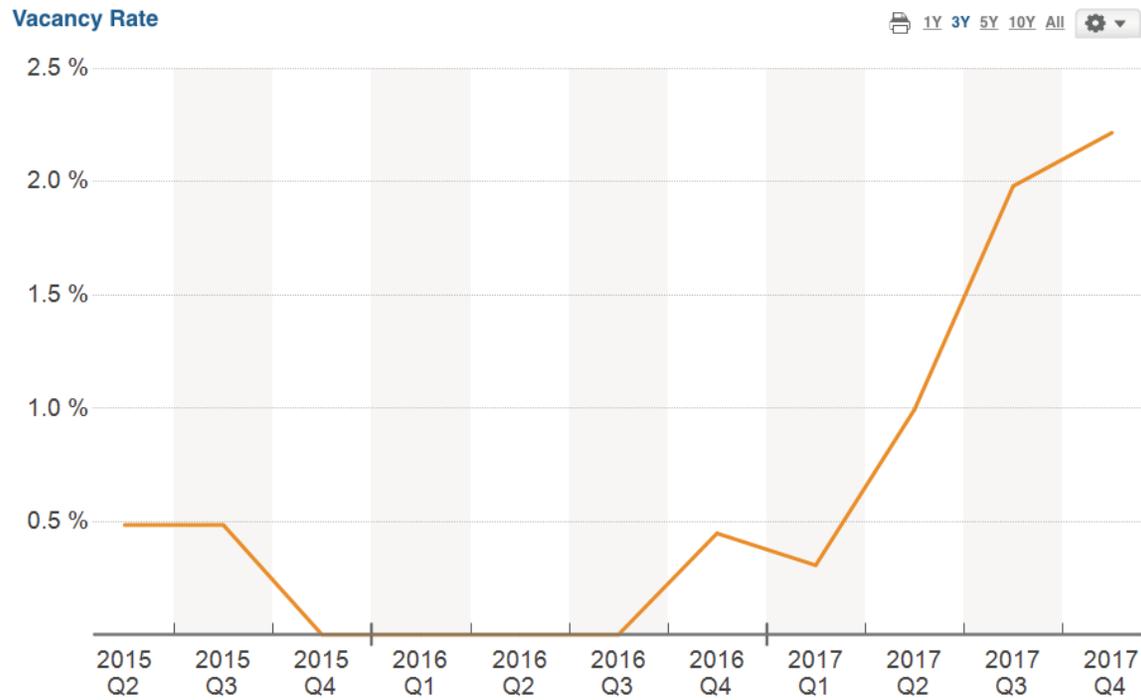
Source: CoStar (each series of horizontal data points represents the net asking rent for one property)



Vacancy

Using the similar methodology assessing vacancy in the past three years for large and small units illustrates a falling vacancy rate.

Vacancy Rate



Findings Vacancy Rate

- Vacancy has been increasing in 2017.

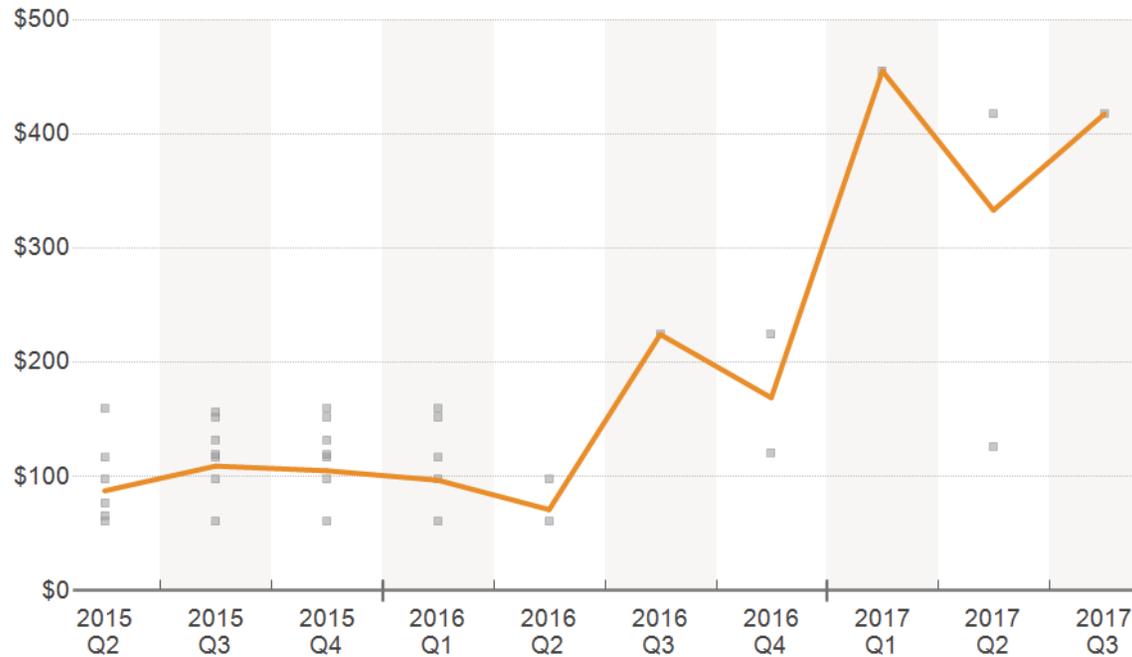
Source: CoStar



Average Asking Price/Sq. Ft.

The sale of retail based properties including mixed use illustrates the growing desirability to locate and buy properties in Barton Village BIA.

Average Asking Price/Sq. Ft.



Source: CoStar

Findings Asking Price Commercial Buildings

- While the trend line shows increasing sale price for retail and retail mixed use buildings on Barton St., the reality is that most properties are selling for \$50 to \$180/sq. ft.
- The value depends on how much redevelopment work the building requires to make it leasable for a retail tenant.



7.0 Investment in Barton Village BIA

The following tables and charts highlight the current and past investment on Barton St. and Barton Village BIA properties. The assessment includes a review of:

- Past and current development applications
- Commercial building permits
- Incentives and grants
- Assessed value

Past and Current Development Applications

Address	Committee of Adjustment or Zoning Code	Reference Number	Details
353 Barton St. E.	HM/A	10	10
374 - 380 Barton St. E.	HM/A	11	293
374 - 380 Barton St. E.	HM/A	11	236
374 - 380 Barton St. E.	MDA	11	137 Re-est legal non-conforming 2 commercial and 6 residential
170 Barton St. E.	MDA	12	144 Construct 20 m telecommunications tower
299 Barton St. E.	MDA	12	249 Construct 42.3 m2 patio
299 Barton St. E.	HM/A	12	298
594 - 598 Barton St. E.	HM/A	12	175
293 Wellington St.	HM/B	13	8 New Horizons
281 Barton St. E.	HM/A	13	241
291 Barton St. E.	HM/A	13	241
340 Barton St. E.	HM/B	13	90
543 Barton St. E.	HM/A	13	16
20 Myler St.	SPA	13	221 Construct 7585 m2 accessory building
217 Barton St. E.	MDA	14	81 Construct parking lot
577 Barton St. E.	HM/A	14	43
601 Barton St. E.	ZAC	14	36
270 Wellington St.	SPA	15	136 Construct 40 stall parking lot
290 Barton St. E.	MDA	15	12 Construct 83 stall parking lot
601 Barton St. E.	DA	15	185 Convert school to mixed use 90 residential units



625 Barton St. E.	HM/A	15	339	
221 Barton St. E.	MDA	16	21	79.4 m2 building
276 Barton St. E.	HM/A	16	202	
552 Barton St. E.	HM/A	16	257	
657 Barton St. E.		16		Redevelop mixed use space
237 Barton St. E.	MDA	17	169	131 m2 addition to hospital
433 Barton St. E.	HM/A	17	100	
635 Barton St. E.	HM/A	17	215	
423-429 Barton St. E.		17		Redevelop St. Vincent Du Paul

Source: City of Hamilton Planning and Economic Development Department

Legend

SPA: Site Plan Approval

DA, MDA: Development Application (modified)

HM/A, HM/B: Committee of Adjustment

ZAR: Zoning ByLaw Amendment Application

ZAC: Zoning Applicatio

The Westinghouse redevelopment is not included in this list at present.



Commercial Building Permits

Barton Village BIA Value of Commercial Building Permits

Year	Commercial	Industrial	Total
2012	\$108,000	\$0	\$108,000
2013	\$298,200	\$105,000	\$403,200
2014	\$216,000	\$0	\$216,000
2015	\$505,400	\$108,000	\$613,400
2016	\$683,878	\$0	\$683,878
Total	\$1,811,478	\$213,000	\$2,024,478

Source: AMANDA Building Permits extracted by GIS-Planning&Analysis where folder_no has a Commercial (C3, C9) or Industrial (I3,I9) component

Notes:

1. Construction Value = Agreed to Value of Construction
2. Total Fees = Total Fees Charges to applicant for building permit to be completed
3. Construction Value provided similar to monthly permit reports

Findings

- There has been growing investment in Barton Street. The dollar values have increased substantially in 2015 and 2016. From 2012 to 2016, over \$2 million has been invested. Future redevelopment of the Hendry Shoe building, Westinghouse site and residential projects such as Gibson School will continue this upward trend.

Grants and Incentives

Barton Village BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG
2012	\$103,705.76
2013	\$116,919.12
2014	\$49,451.95
2015	\$53,762.93
2016	\$44,159.07
Total	\$367,988.83

Source: City of Hamilton



Findings

- Barton Village BIA businesses and property owners have availed themselves of grants and incentives to improve their businesses and properties.
- In the past, businesses in Barton Village BIA had not made good use of the City of Hamilton incentives. This was in part due to business owners that could not afford the matching grants. However, there has been increased investment in Barton Village properties including property owners from outside the area.
- While the increase is a good sign for continued redevelopment, there needs to be continued work to encourage more businesses to take advantage of these programs. The new incentives earmarked for Barton St. and Kenilworth St. need to be assessed to determine if they are making an impact.

Barton Kenilworth Incentive Program Usage

Incentive Program	Usage
Barton Kenilworth Commercial Corridor Building Improvement Grant Program 2016 to 2017	2016: \$50,000 2017: \$191,018.80
Barton Kenilworth Tax Increment Grant Program	\$0
Hamilton Downtown, Barton, Kenilworth Multi-Residential Property Investment Program	\$0
Commercial Corridor Housing Loan and Grant Program	Loan: \$120,000 Grants: \$5,000

Source: City of Hamilton

Findings

- Business stated that they found the usage of the Barton Kenilworth Commercial Corridor Building Improvement Grant program was easier to use and access compared to the CPIG grants. So there was some transfer of access to programs from one program to another.
- There was significant investment in Barton Village BIA in 2017 through the use of these incentives
- There was not a high usage of the other programs.



Assessed Value

Barton Village BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2012	\$20,235,978	
2013	\$19,004,226	-6.1%
2014	\$19,089,973	0.5%
2015	\$19,882,509	4.2%
2016	\$20,430,795	2.8%
2017	\$23,800,174	16.5%

Source: MPAC, City of Hamilton

Findings

- From 2012 to 2017, the assessed value of the commercial areas within the Barton Village BIA has increased by over \$3.6million. This represents an annualized rate of 2.7%. The assessed values had fallen from 2013 through to 2016 below 2012 levels. In 2017, the assessed values experienced a 16.5% increase. This is partly due to MPAC assess value methodology that usually assesses properties every four years.



Implications for Barton Village BIA

- The level of investment in Barton Street has continued to increase year over year. Businesses are investing on the outside and inside of their properties to keep them current, fresh, and innovative. There is a mix of heritage properties and modern structures as well as long-term established businesses and new contemporary ones.

Barton Village BIA Budget

The Barton Street budget has increased from 2012 to 2017. One difficulty with the budget process is the amount of monies raised through parking revenue sharing and the fact that has recently declined (although in 2017 it increased).

Barton Village BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2012	\$530.72	\$4,895.42	\$11,493.78	\$16,419.92	\$46,630	\$63,049.92
2013		\$5,251.06	\$11,245.10	\$16,496.16	\$46,630	\$63,126.16
2014	\$1000.00	\$6,133.62	\$12,447.77	\$19,581.39	\$53,970	\$73,551.39
2015	\$1398.60	\$6,602.91	\$9,784.06	\$17,785.57	\$53,970	\$71,755.57
2016	\$1,325.81	\$6,352.18	\$8,700.82	\$16,378.81	\$53,970	\$70,348.81
2017	\$1,300.00	\$6,887.28	\$10,130.58	\$18,317.86	\$64,300	\$82,617.86

Source: City of Hamilton



8.0 Key Person Interviews

Key person interviews with businesses were conducted during November 2017 to January 2018. The opinions expressed in this section do not necessarily reflect the opinions of 360 Collective, the City of Hamilton, or the Barton Village BIA. The following represents comments and opinions related to strengths, weaknesses, opportunities, and threats.

STRENGTHS

ECONOMIC DEVELOPMENT

City Grants and Incentives

- City grant programs have been amazing

Real Estate Momentum and Innovative Ideas

- There is some real estate momentum happening but more needs to happen
- Able to offer site for innovation to come to life

Operating Costs

- Low rent and overhead costs
- Businesses are attracted to the area due to low rent and ability to build a business from the ground up with very low operating costs

Consumers Attitude

- Local residents tend to shop local, fiercely loyal

Hospital

- Is a benefit – brings people in, workers, potential customers, visitors, etc.

Changing Residential

- Younger families and young adults are moving into the area (30 to 40 year olds)
- Like that Barton is not Downtown but not suburban either
- See the change in neighbourhood residential make up, younger people, younger families, and some people from Toronto



ORGANIZATION/GOVERNANCE

BIA

- Members have a good relationship with the BIA
- BIA has a vision
- BIA focus is more on beautification

Collaboration and Capacity Building

- BIA works collaboratively with other organizations

PHYSICAL IMPROVEMENTS AND AMENITIES FOR ENJOYABLE SHOPPING

City Funded Beautification

- City recently has provided more money for beautification

Safety

- Statistics show that Barton Street is a relatively safe street and that there is less crime in the area than other areas of the City

MARKETING

Perception

- Neighbourhood is much better than the perception
- Perception that street is not clean and unsafe is not a reality

Identity

- Barton Street is better known today than it was in the past



WEAKNESSES

ECONOMIC DEVELOPMENT

Non-Conforming Building Uses

- There are still some squatting and illegal, non-conforming uses of buildings on Barton St. E.
- There is mismanagement of some buildings including property standards and upkeep by landlords

Consumer

- Today's consumer is extremely price conscious and will travel long distances to save small fractions

Business Mix

- Too many social services on the street that deaden the street and don't create an active shopping environment
- To survive on Barton St. today, businesses need to be destination oriented – but that could change in the future
- Barton Street could be a good business incubator

Tipping Point

- There is no energy on the street yet – something people can 'hang their hat on'

Lower Sales

- Sales have been lower than expected

Commercial to Residential Conversions

- Still more work to be done to move residential out of commercial areas

Building Conditions

- Had to stop doing real estate crawls due to lack of properties that would let their buildings be viewed

Retail Experience and Business Mix

- Retailers are disjointed on the street

PHYSICAL IMPROVEMENTS AND AMENITIES FOR ENJOYABLE SHOPPING

Street front

- Lack of consistent street front with animated ground level retail



- Too many social services in retail spaces
- Gaps present an issue for walkability

Streetscaping Efforts

- New benches put in are just an invitation for homeless people and locals to smoke on them
- City needs to update their own assets including planters, lighting, etc.

Safety

- Safety is a real issue and not just a perception
- Some issues are petty
- Dark alleys in the area that invite safety issues
- Still some prostitution issues

Air Quality

- Pollution and air quality concerns due to nearby industry

Parking

- Parking issues near the hospital, otherwise not a lot of parking issues

Transit

- Not enough public transit flowing through the area and it is becoming unaffordable for local residents to use

ORGANIZATION/GOVERNANCE

BIA

- BIA has not taken a position on supporting investors and redevelopment potential
- There is no strategy at the BIA to deal with the groups who have tried to help revitalize
- BIA needs to focus more on economic issues affecting businesses and less on social issues affecting the street
- BIA members need to see the potential of the street rather than get stuck in the Barton St. of the past (resistant to change)
- No metrics to evaluate if BIA is doing a good job or not
- The BIA boundary is too big and is disjointed (Victoria to Gibson is the sweet spot) and that's where they should focus their energy
- BIA Budget is too low



City

- City tends to straddle between pushing for redevelopment and backing financing through incentives but are also concerned about neighbourhood character
- City is not helpful during redevelopment and permits
- Barton is not a high priority for the City
- City injects more hoops to go through for businesses on Barton
- Outside Investors
- No one cares about outside investors coming from Toronto
- Businesses feel targeted with out of Hamilton sentiment
- There is a strong anti-Toronto sentiment

BIA Collaboration and Capacity Building

- Not doing enough to develop stronger relationships
- Believe there is a strong vision for Barton Village that the BIA wants but they have not been able to share it enough with others
- City staff turnovers have made it difficult to develop working relationships and build capacity

MARKETING

Identity

- There is no Barton Street identity
- There is no real anchor for Barton Street and no real brand

Long Term Solution

- Barton needs a long-term solution and most people are only focused on quick wins and that is not how Barton works – the result is that people become frustrated that they cannot effect change in a fast manner

Events

- Decided to cancel BIA involvement in the festival because it was held in a park and it didn't benefit local businesses



OPPORTUNITIES

ECONOMIC DEVELOPMENT

Business Mix

- Need to recruit businesses such as: music, butcher, green grocer
- More retail
- Too many gaps in the street front that need to be filled
- More clothing and services
- More neighbourhood grocery items
- Is Barton Village retail ready?

Consumers

- Attracting more LGBTQ customers than before

Office Development

- There need to be more businesses in the Barton area, more daytime traffic generators

Catalyst for Change

- wanted to be a catalyst for change somewhere and thought Barton Street provided him with this opportunity
- Believe that Barton St. has a better-known identity than in the past
- Westinghouse redevelopment and Gibson School lofts will trigger significant catalyst changes for the area
- Primed for gentrification but still a bit too early

Incentives and Grants

- City has been generous with grants and incentives so the tools are there for investors but people have not used them to the full extent
- Property owners need to be convinced to update their buildings and make them more attractive to investment

Affordable Housing

- Need more affordable housing units



Building Enforcement

- City needs to enforce the legal use of buildings

Gentrification

- Gentrification is a long-term vision and not happening immediately. Need to focus on local issues first before going full in for gentrification changes

Hospital

- Want to see an economic impact study of the hospital and health care and how to attract additional spin off business from the hospital including more medical businesses on the street
- New park and garden space added to the hospital grounds

PHYSICAL IMPROVEMENT AND PROGRAMS FOR ENJOYABLE SHOPPING

Safety

- Increased police presence required to cut down bad behaviour
- Better working relationship with the police is required – Police need to work with the businesses to show they care about the area and are working on improving things

Beautification

- Is a priority and more can be done to improve the street
- Add more garbage receptacles, more recycling options

ORGANIZATION/GOVERNANCE

- Needs a full-time person to carry out advocacy work, retail recruitment,
- BIA needs more resources

MARKETING

BIA Brand and Identity

- Barton needs a niche for marketing purposes or something we can be known for
- Need better graphics for brand image

Communication

- Wants more options for increased input



9.0 Summary Strengths Weakness, Opportunities, and Threats

9.1 Workshop #1 Feedback

In January and March 2018, two workshops with Barton Village BIA staff and members was organized. During these two presentations and discussions, the following were key discussion items in terms of policies and procedures, brand/identity, clean and safe initiatives, and vacancy, recruitment, and business development.

Cleanliness and Safety

- Belief that the current Hamilton Police reporting of criminal incidents in or near Barton Village are not accurate. This may be due to under-reporting by those affected, paper work trails by the police, or a number of issues.
- It was agreed that there was both a perception issue as well as a reality issue.
- There are incidents along the street and the BIA has continued to encourage members and visitors to report the incidents even if they seem minor or insignificant. The reportings are linked to resources that the police use to determine priorities. It is then possible to follow up on potential issues if there are repeat offenders.
- It is also important to correct perception issues and stay on top of the media and other news sources related to how Barton Village is portrayed. Correcting errors or mis-identifying the Hamilton Detention Centre as Barton Jail are important.
- The BIA wants to continue good working relationships with the police including having the new officer visit businesses and develop a personal relationship with businesses on the street.
- Increased networking, reporting, and police seminars are also important.
- There is a concern related to the over-use of police on the street and that too much visual presence can also send a negative signal that Barton Village is less safe. Members want police presence but not in an intimidating manner (e.g., more police on horseback, bike cops, etc.)
- The anti-gentrification or Tower Group has been a concern. Barton Village is willing to work with other partners in the City to address issues and develop a solution. However, the BIA wants to acknowledge that they did not receive similar attention to the attacks on their BIA compared to the Locke St. BIA incident.
- It is important to remember that there are legitimate issues related to the anti-gentrification call to action and that the BIA can address some of these concerns through the members' anti-poverty work while still allowing for change to happen along the street. There are issues around the pride of neighbourhood and maintaining the dignity that are important as well.
- The members acknowledge that the anti-gentrification issue still makes them vulnerable to a backlash if not addressed properly.
- The BIA is encouraged to reach out to other BIAs and organizations such as Parkdale BIA in Toronto to see how they have addressed similar issues.



- At present, the Barton Village BIA is not part of the geographically based Downtown Clean and Safe Taskforce.

New Development

- The hospital is considering relocation of additional services to the site from elsewhere in the City (child and women's facility) and would redevelop a portion of their existing site.
- There is increased interest from businesses located elsewhere in the City to avoid LRT construction issues. Businesses are relocating from other areas such as International Village.
- New businesses know the area well and the issues and opportunities.
- The landlords do extensive due diligence with potential tenants to ensure they understand the issues and opportunities. Landlords are looking for potential tenants with existing business/retail/commercial experience.
- Some landlords are developing retail concepts themselves rather than leasing their premises.
- Westinghouse has started redevelopment and will be a significant positive addition to the area.
- Other landlords are waiting to determine what types of redevelopment are the best options for the area.
- The focus should be on a select number of blocks rather than the whole street. It should be concentrated in order to make an impact rather than diluted.
- BIA should develop a wish list of retailers and businesses (e.g., green grocer, escape room, game café, craft marketplace, etc.). It is important that a business wish list is matched to the reality of the lower foot traffic and that the potential business include ways to increase sales through add-ons (e.g., a green grocer that sells prepared food) or can capture higher gross margins by making or sourcing the products themselves (e.g., handmade soap).

Types of Entrepreneurs and Businesses

- A prime driver of growth in Barton Village is affordability. This is good but it cannot be a long-term sustainable reason for businesses to locate in the BIA.
- Local entrepreneurs, locally made goods. Need a place to collectively sell their goods (similar to the Right on Target space"
- Millennials including ethnically diverse millennials
- Outside of Hamilton investors – Barton Village is open for business
- Existing businesses that are looking to expand
- Health and wellness type goods and services (e.g., medical, daycare services, etc.)
- The social service organizations provide needed life skills to workers. In addition, social services provide volunteers opportunities to increase the skill sets.
- Destination type businesses are what works today
- Has to be the best match to the foot traffic on the street



- Have to be able to work with prospective businesses to help them succeed. This could include coordinating with them on engineers to use for change of use requirements, who to contact at the City of Hamilton for incentive information, and how to structure a lease deal that may include leasehold improvements up front that is recuperated later on in the life of the lease.
- Much of the business investment happens organically and many businesses do their own due diligence. However, BIA can link to all brokers working in the area to increase the knowledge and flow of information.

BIA Policies and Procedures

- Reviewed the importance of developing a succinct vision statement, mission statement, and other BIA related policies and procedures.
- As a next step, a proper brand strategy should be developed which will provide the BIA with the needed guidelines for easy decision making going forward.
- Reviewed what a Vision Statement is: "an organization's aspirational road map. It should indicate both what the organization wants to become and guide transformational initiatives for growth."

Other Issues

- Length of BIA and expansion or contraction
- Streetscaping and bike lanes
- BIA sponsored events
- BIA staff and resources



9.2 SWOT

Strengths

- Hard working independent businesses
- Increased commercial, residential, and mixed-use investment from both local Hamilton and outside Hamilton developers
- Changing socio-economic profile of local residents to younger families
- Investment in institutions such as Hamilton General Hospital and other health institutions
- Businesses catering to daytime residents and workers as well as a growing night time and weekend economy
- Increased recognition in the public relations on the positive changes happening

Weaknesses

- Lower household income of local area households
- Social issues as well as mental health and poverty in the local neighbourhood
- Concern over perceived and real criminal activities
- A risk of polarizing local neighbourhood in terms of income
- Continued issues with the lack of retail continuity on the street and the number of commercial to residential conversions
- Potential to take away special incentives for Barton St. redevelopment and investment

Opportunities

- Increased demand for goods and services for a changing local neighbourhood
- Serving the local employees in the area and those flowing through the area to the Downtown, harbour area, and the east end
- A strong base of destination businesses that provide a unique character
- Investment in new creative industries that may not be typically associated with visual arts

Threats

- Clean and safety issues
- Allowing the area to grow and adjust to market conditions and redevelopment but allowing for social issues in the area to be addressed in a positive manner



10.0 Changes in Recommendations from 2011 to 2017/2018

The following are noted changes in Barton Village BIA in terms of suggested recommendations in 2011 and the current market assessment report in 2017/2018.

Changes in Recommendations from 2011 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Continue to be a voice for Barton Village with the City of Hamilton to ensure parking, property standards, parks and recreation, Hamilton BIAS, special events, etc. assist in the revitalization efforts of this neighbourhood street.	This continues to improve as City staff and BIA relations are solidified. However, it is a work in progress, including with City Councillors.
The budget should not be increased except through increased assessments that arise through redevelopment	<p>The BIA budget will need to be addressed for the types of programs and services that members want to be developed. This may include a one-time spike in the budget to fund special projects such as a branding program. The BIA should work with the City at assessing different levies based on property assessment and changes to the caps or % assessment on some properties.</p> <p>Given the BIA has decided to a modest expansion of the BIA boundary, the BIA and the City should determine the implications on the levy if they hold the levy on all other properties the same.</p>
The business mix should include both neighbourhood goods and services as well as destination businesses in arts, culture, business to business, furniture, etc.	The mix will continue to evolve. There are opportunities for local neighbourhood and daytime worker demand. However, the focus will shift more towards cultivating would-be entrepreneurs and investors as to who will invest in Barton Village rather than just focusing on what types of businesses.
Affordable rents and land values are to be marketed	While affordability is a good starting position, with redevelopment it is not a long term sustainable



	<p>proposition. A brand campaign will uncover the essence of why businesses should locate in Barton Village.</p> <p>A key goal for the BIA is how to get increased public and private sector investment.</p>
Increased learning for BIA members	Have done workshops and other programs such as social media, grants, networking events, etc. The BIA is anticipating growing these workshops further.
On a block-by-block basis work with property owners and City staff to determine the building, zoning, and commercial assessments for each property	Much of this work was conducted in the Barton Kenilworth study but there are still deficiencies in terms of which businesses are commercial and which ones are residential.
Work with City on guidelines for design and physical improvements	Was part of the Barton Kenilworth Study and still awaiting implementation of key study recommendations. The BIA sees the need for streetscape improvements and is looking for City of Hamilton support for this work.
Develop a Clean and Safe Protocol and hire clean up staff	BIA hired a beautification assistant for the summer. The protocol component is to be undertaken. But the BIA can set up some standard procedures on who to call regarding clean and safety issues (e.g., police, how to report an incident to the police, broken lamp posts, etc.)
Develop more artist live/work spaces	This has begun and other incubators spaces have reached out to the BIA to join as members. Barton is a great place to test new business concepts. The redevelopment of the Westinghouse building is underway and will be a catalyst project for the street. However, more work can be done to institutionalize and make permanent these business incubator spaces. This will ensure that Barton Village's unique character will remain in the face of development pressures.



Continued enhancements of Woodland Park	Some progress has been made including an extreme park makeover but more work is required to integrate the park into the streetlife and BIA.
Add more lighting to buildings to enhance the creative side of the BIA identity	The BIA could look at programs in other BIAs related to their lighting programs.
Continue with umbrella type marketing that illustrates both positive and neighbourhood focused images of Barton Village	Good work has been made including Cable 14 news stories, developing video on local and regional businesses (profiles). Significant progress has been made in social media through the 2018 summer hiring of a social media person. The improved social media has resulted in higher attendance at events and engagement with targeted audiences.
Develop more neighbourhood-oriented festivals and events	Yes
BIA to assist businesses that want to develop events	May not be realistic given current budget constraints but some progress has been made
Extend marketing reach to local employers	Have worked with employers such as the hospital on promoting new business openings and have delivered Barton Gift Certificates to be given to local employees to use at businesses. This has worked well and is being extended through the BIA social media outreach.
Work with the City on ways to improve the public's perception of Barton Village in the region including positive public relations articles	Work in progress but some positive momentum is being made.



11.0 Vision

Previous Vision

The previously articulated vision for Barton Village BIA was to focus on three key goals:

- Continuing to improve and enhance the clean and safe programs including the BIA staff person, reporting protocols on property standards, police liaison work, among other initiatives
- Enhancing the businesses and services that cater to the local residential population
- Creating a pedestrian friendly atmosphere and places for local residents for recreation including Woodlands Park

Barton Village BIA will need to commit to a program of writing and agreeing on:

- Vision statement
- Mission statement (as set by the Provincial Municipal Act)
- Brand and brand guidelines
- New policies and procedures for how the BIA will be organized

This report will assist in understanding the dynamics and future opportunities on the street.



12.0 Barton Village BIA Action Plan

The following action items are meant to stimulate internal conversation within the BIA staff and members, committee and task forces, as well as the City of Hamilton and other partners.

The action items are divided into the four pillars of organization, economic development, physical improvements, and marketing. The listed action items are suggestions for the BIA and the City to follow. They do not imply that the BIA nor the City is responsible for their implementation. They do not carry any financial burden on either party. This commercial market study report and action item list should be used by various committees of the BIA and City departments as background information to inform decision making moving forward.

Each action item includes the following elements:

- Specific task
- Measurement
- Action item
- Responsibility
- Time frame

The action items and recommendations are based on the four pillars including:

- Organization/governance
- Economic development
- Physical improvements and programs for enjoyable shopping
- Marketing including both customer focused marketing (promotions, social media, traditional media, etc.) and an investor attraction marketing component



12.1 Organization

STRATEGIC GOAL

- Continue to enhance the BIA organization including staff, board members, and volunteers to carry out the programs

RATIONALE

- A financially dedicated organization is required to support the members and create an environment where it is possible for businesses to be successful

DESIRED RESULT

- The consistency of organizational leadership that members can rely on for advocacy, internal communications, and marketing
- While there are opportunities to facilitate economic development, the BIAs role will be primarily liaison in nature and not extensive coordination

HOW TO ACCOMPLISH

The following highlights key suggested recommendations for the Barton Village BIA organization.

Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Develop a brand, vision statement, mission statement, and policies and procedures manual	<ul style="list-style-type: none"> • Sequentially address each item until completed 	<ul style="list-style-type: none"> • Use existing resources as templates but develop a calendar schedule to solicit input and work on each item 	BIA	Immediate
Increase internal communications	<ul style="list-style-type: none"> • Commit to key deliverables such as monthly email newsletter, weekly 	<ul style="list-style-type: none"> • Develop a calendar of communications 	BIA Executive Director	Immediate and ongoing



	<p>email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only</p>	<p>correlated to different mediums</p> <ul style="list-style-type: none"> • Ensure BIA database is current – if not, work with City to get contact information • Ensure BIA is getting timely updates from the City on relevant projects 		
Increase BIA Budget	<ul style="list-style-type: none"> • Minimum growth with inflation and allows natural increase with the total assessment increase 	<ul style="list-style-type: none"> • Increase BIA budget inline with BIA boundary expansion • BIA budget may be increased for a one time expenditure such as branding • Assessment value of BIA and keep the budget at a core rate compared to assessed value (look at past assessment values) • Consider removing caps on businesses or 	BIA with assistance from City of Hamilton	Immediate to Short Term



		increasing the % caps		
Develop a Clean and Safe Task Force with area partners	<ul style="list-style-type: none"> Resources dedicated clean and safe for the BIA 	<ul style="list-style-type: none"> Task Force is responsible for internal communication with members to increase reporting, data base tracking, liaison with police and community outreach workers, etc. 	BIA and members as well as area partners	Immediate
Ensure BIA organization is current with City required policies – social media and procurement	<ul style="list-style-type: none"> Number of policies in place and year they were last updated 	<ul style="list-style-type: none"> Ensure BIA has updated social media and procurement policies Review and update these and other policies on a regular basis 	BIA	Immediate
Partnerships	<ul style="list-style-type: none"> Number of valuable partnerships Review partnerships every six months to every year 	<ul style="list-style-type: none"> Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA 	BIA	Short to Medium Term



		<ul style="list-style-type: none"> • Prioritize partnerships based on current and future impact to the BIA (Hospital, Westinghouse, Cotton Factory, social services, houses of worship, etc.) • Address issues such as anti-gentrification through the BIAs work with various partners that improves quality of life 		
Review BIA boundaries to expand or contract	<ul style="list-style-type: none"> • Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> • Current expansion at Sherman is under review • Every two years, review boundaries and determine if changes are merited • BIA should develop evaluation criteria to test against potential expansion such as: 	BIA potentially in coordination with City Urban Renewal	Current and Ongoing



		do new businesses reflect a similar identity to Barton Village BIA, are business competitive or complementary, and pros/cons on BIA levy		
Change committee structure to Task Force structure	<ul style="list-style-type: none"> Number of task forces and competed items 	<ul style="list-style-type: none"> Develop short term task forces that board members and members can work on for short durations to produce results 	BIA	Short to Medium Term
Focus AGM and other meetings on positive learnings	<ul style="list-style-type: none"> AGM participation and feedback process 	<ul style="list-style-type: none"> Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc. 	BIA	By next AGM





12.2 Economic Development

STRATEGIC GOALS

Barton Village BIA will provide an opportunity for:

- Retail and commercial entrepreneurs, businesses, and investors to locate, expand, and thrive by being able to
 - Nurture local entrepreneurs to start up and expand new businesses in the BIA
 - Look to young entrepreneurs that can grow their business ideas within the BIA
 - Focus on businesses with previous business experience
 - Increase health and wellness type businesses and spin off type businesses especially those related to the hospital
 - Attract outside investment
 - Focus on “who” these entrepreneurs and investors are rather than on what types of businesses would do well
- Attract high quality workforce to live and work nearby and in the Greater Downtown Area

RATIONALE

- By focusing on the “who” - entrepreneurs and investor types, it allows for the BIA to be nimble and flexible as new innovative business ideas take shape (many of which have not been considered yet)
- Allows Barton Village BIA businesses to stay competitive and innovate.
- Increases the real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of the Barton Village BIA.
- Creates a diversified economy throughout Hamilton

DESIRED IMPACT

- Decreased vacancy
- A non-traditional main street experience that is more focused on entrepreneurs and interesting investors than on the clusters or types of businesses
- Enhanced local serving demand from residents and workers as well as visitors (hospital visitors and regional visitors)



HOW IT GETS DONE

- The City of Hamilton and the BIA allows for business opportunities to grow through retention, expansion, and recruitment programs.
- To foster an economic climate that supports the economic health of existing businesses and encourages the location of new businesses that fit within the overall vision.
- Focus less on a directory of businesses and physical brochures as the business mix will change constantly. A digital only version of the business mix is sufficient.
- Will be based on five key strategies:

Five Key Strategies

6. Identify both retail and commercial opportunities, gaps, and strengths to build upon (based on criteria of finding a partner in Barton Village BIA that supports the sector)
7. Define investor recruitment targets
8. Strengthen infrastructure
9. Review planning context
10. Make investment easier

Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Local Neighbourhood Goods and Services	Grocers, pharmacy, cafes, coffee/tea, hardware, personal services, etc.	<ul style="list-style-type: none"> • Create clusters of local neighbourhood serving goods and services to take advantage of the local residential and daytime worker population • The BIA is too long to have the entire street devoted to local goods and services. These businesses need to be clustered tightly together to create impact and draw
Eating Establishments	Cafes, coffee/tee, quick service, dining, blurred services with other services or retail offering, night time economy, entertainment focused	<ul style="list-style-type: none"> • Not mutually exclusive from some other sectors especially local and incubator based businesses. • Growing trend for BIA businesses to focus on
Incubator	Small scale value-added local production: food, agriculture, artisan manufacturing, on farms and in Hamilton; retail distribution in Hamilton and Barton Village stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> • An underdeveloped resource that diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in a supportive ecosystem) • Develop in partnership with the value-added agriculture sector, artisans, existing micro-businesses, arts and culture groups, local institutions and with potential provincial support • Build a "food entrepreneurship ecosystem" tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Farmers Markets, co-tenancy in stores, organizing "Hamilton food" stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.) • Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts



	Description	Rationale and Tactics
		<p>Council) to explore their needs and best practices and build strategy and ecosystem to support their growth. Tactics parallel those described above for food.</p> <ul style="list-style-type: none"> • Start by identifying Hamilton residents currently making and selling artisan products. • Encourage craft type markets
Social Service Agencies and Retail	Live and work life skill learning, volunteers, vulnerable residents	<ul style="list-style-type: none"> • Encourage social organizations to develop quality retail and services many of which already exist • Develop art and craft programs and markets to showcase their goods
Creative	Creative industries – beyond visual arts to other companies such as website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> • Prerequisite: high speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity. • Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.
Arts & Culture	Visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> • Leverage assets in the Barton Village BIA such as Westinghouse, schools, social services, as well as cafes and restaurants as venues for display and performance as well as potential arts markets, arts events, etc. • Partner with adjacent places such as Cotton Factory on community events, programming, and development. • Synergy with tourism development. Build reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community)
Destination Businesses	Create an opportunity for businesses to establish themselves based on convenience of location as well as customer engagement	<ul style="list-style-type: none"> • Provide liaison and linkage services for property owners, brokers, and site selectors promoting the benefits of locating in Barton Village

Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Identify retail and commercial priority sectors to fill gaps and leverage opportunities	<ul style="list-style-type: none"> • Increase in retail and commercial cluster strength • Reduced vacancy • Positive absorption • Increase retail merchandise to 15% and increase food and drug retail to 15% • Lower vacancy 	<ul style="list-style-type: none"> • Discuss with BIA and City (and other stakeholders) on potential growth sectors based on agreed prioritization of: • Local partner interest • Good regional growth prospect • Strong competitive positioning • Aligned with Provincial priorities 	<ul style="list-style-type: none"> • City of Hamilton and BIA 	<ul style="list-style-type: none"> • Medium to long term
Define investor recruitment targets	<ul style="list-style-type: none"> • Clearly defined investor target audience 	<ul style="list-style-type: none"> • Develop a list and articulate who the City and the BIA are targeting in attracting investment and recruiting new businesses. May include: • Millennials, • Ethnically diverse Millennials • Business expansion 	<ul style="list-style-type: none"> • City and BIA 	<ul style="list-style-type: none"> • Medium to long term



		<ul style="list-style-type: none"> • Social service provider of life skills through retail • Outside investors • Others 		
Strengthen infrastructure	<ul style="list-style-type: none"> • Business turnover decreased • New business openings 	<ul style="list-style-type: none"> • Clean and Safe Task force • New streetscape plans • Investment in Wi-Fi in Downtown including Barton Village • High speed internet and broadband width • Incubators 	<ul style="list-style-type: none"> • City 	Medium Term
Review planning context	<ul style="list-style-type: none"> • Updates to Barton Kenilworth Study and recommendations 	<ul style="list-style-type: none"> • Review Barton Kenilworth Study for further updates to City policies and guidelines 	<ul style="list-style-type: none"> • City 	<ul style="list-style-type: none"> • Ongoing
Make Investment easier	<ul style="list-style-type: none"> • New business openings • New mixed use developments 	<ul style="list-style-type: none"> • BIA can post listings of properties for lease or sale, develop and post retailer and commercial wish list, and provide linkages to key broker sites that 	<ul style="list-style-type: none"> • City and BIA 	<ul style="list-style-type: none"> • Medium Term



		<p>are leasing/selling properties</p> <ul style="list-style-type: none">• City can reduce costs, risks, and barriers to investment including:<ul style="list-style-type: none">▪ Competitive tax rates, development friendly approval processes, market current opportunities▪ Develop sector specific recruitment materials▪ Review all incentives and marketing of incentives against the economic development plan▪ Increased residential and office mixed use developments		
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The BIA believes that improved collaboration between the City of Hamilton and the BIA should take place to move forward on these action items since the BIA is currently not in a financial or resource based situation to lead the charge on business retention and expansion.



12.3 Physical Improvements and Programs for Enjoyable Shopping

STRATEGIC GOAL

- Use placemaking elements as part of an overall economic development strategy to increase dwell time, increase sales opportunities for businesses, and as a business investor attraction component.

RATIONALE

- Placemaking elements such as beautification must extend beyond planting flowers and banners. The use of placemaking elements needs to have a community building and social gathering element to it that supports business sales development.
- In a hyper competitive context of online retail, shopping centres, power centres, and increasingly competitive main streets, placemaking elements can be a key differentiator
- Placemaking can also be part of a recruitment economic development program that attracts investment to Barton Village.

DESIRED IMPACT

- Increased dwell time for visitors who stay longer, shop more and spend more.
- Offers opportunities for people to meet, social, build community.
- Allows for businesses to engage in guerilla marketing techniques that targets infrequent visitors (e.g., hospital visitors, destination business visitors, etc.) that encourages visitors to stay longer in the BIA
- Creates an environment that attracts further investment.

HOW TO ACCOMPLISH

Parking

- Develop a complete toolkit solution based on affecting supply, management, and marketing. This includes reviewing the number of publicly and privately available spaces.
- Work with the hospital and City to ensure parking needs, management, and enforcement are addressed in an appropriate manner for all concerned visitors and employers.
- Placement of maps and directional signage at the entrance to central lots as well as in the Hospitals and employment areas that highlight businesses that employees and visitors would be interested in (e.g., lunch).



- Increased usage of digital and physical wayfinding and directional programs.
- A marketing program to remind visitors to park in long-term lots for longer stays.
- Ensure public parking is considered as part of every mixed use development (whether it is ultimately included or not is subject to the evaluation),

Urban Plazas and City Squares – Create Opportunities for Amenities to Happen

- All streetscape programs should address creating more mini urban plazas along Barton St. E in the BIA for people gathering, events, and retail and commercial businesses.
- Increase the amenities in park areas such as Woodland park,

Patios

- The patio program from the City of Hamilton is still evolving. It can be used for more than eating establishments and can be part of a guerilla marketing program for pop ups.
- Issues with engineering drawings are being addressed through a two year renewal period/
- The BIA should monitor its implementation and make changes as it evolves so that costs are kept low.

Multifunctional Street Art and Amenity

- Items such as bike racks, protective gates around tree trunks, benches, street lamps etc. can all include an element of art into the design. The more that placemaking elements have multiple functions, the better.
- Create art programs with the hospital including the potential for a huge mural on the south façade.
- Add to the mural program



St. James Town murals extend multiple levels



Wynwood Walls, Miami has created a whole district dedicated to the amazing mural art

Proper Use of Lighting

- Safety is paramount in terms of any discussion around lighting. For Barton Village BIA, lighting should follow the prescribed elements in the Barton Kenilworth study.
- There is increased use of building lighting and creating a more ephemeral lighting program that creates interest around the night time economy and provides elements of safety.

Physical Improvement Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Any streetscape plans must be vetted through the lens of economic development	<ul style="list-style-type: none"> A required step in any streetscape changes 	<ul style="list-style-type: none"> Develop a protocol whereby streetscape changes are vetted through the lens of potential positive impacts on area businesses including trade offs 	<ul style="list-style-type: none"> City of Hamilton and BIA 	<ul style="list-style-type: none"> Immediate to Long Term (based on current LRT needs)
Review parking needs in light redevelopment, loss of surface parking lots, maintaining or growing existing supply, and increased use of technology	<ul style="list-style-type: none"> Measure the effect of losing parking spaces on office sector needs, visitation, 	<ul style="list-style-type: none"> As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones 	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> Patio administration program for Barton Village BIA is completed BIA should meet with Parking and Transportation on an annual basis to review changes to parking and loading
Review physical and digital wayfinding	<ul style="list-style-type: none"> Increased visitation Reduced wayfinding complaints 	<ul style="list-style-type: none"> Review with City location of wayfinding signage and determine ways to increase signage to Barton Village 	<ul style="list-style-type: none"> BIA and City 	<ul style="list-style-type: none"> Review annually



		<ul style="list-style-type: none"> • Constantly update any digital wayfinding elements 		
Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases	<ul style="list-style-type: none"> • Conduct a study 	<ul style="list-style-type: none"> • Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy 	BIA and City of Hamilton	One year
<p>Develop art programs such as an oversized mural campaign Note – they must be professional</p> <p>Another program is that all redevelopment hoarding must include a minimum amount of public art</p>	<ul style="list-style-type: none"> • Number of professionally completed murals 	<ul style="list-style-type: none"> • Partner with area buildings such as the hospital, art programs, and others to gain interest, get PR and provide funds for murals • Implement findings from the Willowbank streetscape program 	BIA and partners	One to two years



12.4 Marketing

CONTEXT

- Develop a program for a new Barton Street BIA to create positive messaging for visitation and investment attraction.

STRATEGIES

- Create a common brand as well as a vision statement and mission statement that reflects the true character of Barton Village, the potential for increased investment, and the changes it will be going through.
- Create a common “commercial” Barton Village brand to be used for visitor attraction and investor attraction.
- Utilize partnerships to collectively amplify this brand story for Barton village visitation and attraction.
- Build focused foundational messaging and marketing plans.

RATIONALE

- No clear direction on the current brand story for Barton village.
- Negative perceptions need to be addressed in a consistent positive branded story.
- Allows for easy decision making with brand guidelines and guardrails in place – allowing the BIA staff to focus on program delivery instead of small issues.
- Willing partners such as Westinghouse, hospital, other property owners who want to leverage the Barton Village brand.

DESIRED IMPACT

- One consistent, focused brand story that will attract both investors and local and regional visitation.

HOW IT GETS DONE

- The brand should be flexible enough to allow it to change and evolve over time as the revitalization of the Barton Village BIA takes hold (it should not be a static brand).
- There may be a “master” brand for the BIA with the usage of other brand elements such as how to brand events, programs, parking, etc.
- Potentially take a stronger ownership of the word Barton and turn it to a positive and shorten the title (e.g., The Barton, The Bart, The Bartty, etc.) and drop the term village.
- Work with property owners, brokers, City etc. on providing that liaison service for investment attraction but the BIA is not actively recruiting.
- The BIA can work on one event but the budget and resources do not allow for more than that at this time.



First, a strategic branding exercise needs to be undertaken to determine what the Barton Village BIA retail commercial brand stands for. This would include defining the following:

- What makes Barton Village BIA different, better and special than other commercial districts?
- What do we want Barton Village BIA to stand for in 5 years?
- What the top reasons I should visit, invest and/or live in the area?
- How does this positioning stack up against the competition?
- Who are the key target groups and segments we should focus on with this strategy?
- What results do we collectively want to achieve?

You need to integrate all the local assets into a unique character. Key challenges to achieving that integration to consider in this process include:

- Reflecting the character of each of your unique attributes and offering
- Integrating all elements of these attributes into a singular vision
- Creating engagement across all stakeholder groups
- Aligning key stakeholders to the vision

The effect of distinctive and compelling messaging and an identity will be a well-defined position in the marketplace, one that will set Barton Village BIA apart from the rest of the pack.

Secondly, once the core brand strategy is defined, development of a hierarchy of key messages based on the identified target groups needs to be created. This will create a focus for each group from a communications perspective. And provide a disciplined framework for ensuring message consistency across all touch points

Lastly, a brand identity should be crafted that will define the look and feel of this brand and the tone and manner. Based on the brand identity, a brand toolkit would be created that would include templates for communication elements. This toolkit would be shared by all organizations and sets the stage for a common external brand look and voice.

This will ensure consistent use of the identity positioning and language across applicable media applications.

Toolkits such as these allow organizations to focus on the business of attraction and promotion versus spending their time creating new messaging and marketing on an ongoing basis.



Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Strategic branding exercise	<ul style="list-style-type: none">Completed brand positioning	<ul style="list-style-type: none">The result would be a careful synthesis of strategic thinking about your community, your brand and your targets mapped against your business objectives. As well as consideration for what will be differentiating, engaging and motivating for the future	<ul style="list-style-type: none">BIA and partner agency	<ul style="list-style-type: none">Immediately
Key Messaging Hierarchy	<ul style="list-style-type: none">Completed messaging hierarchy	<ul style="list-style-type: none">A matrix which links key messages to your Promise, Benefits, and Positioning and expresses your brand positionIndividual messages for each of your separate target groups	BIA	<ul style="list-style-type: none">Short Term

<p>Brand identity creation</p>	<ul style="list-style-type: none"> • Brand guidelines 	<ul style="list-style-type: none"> • Strategy and partner agency team/creative team develop the new identity (logo, symbols, colour palette etc.) and tagline options based on the approved strategic direction. This would include identity options that link to the identified assets and differentiators of the BIA 	<ul style="list-style-type: none"> • BIA and partner agency 	<ul style="list-style-type: none"> • Short term
<p>Brand communication toolkit development</p>	<ul style="list-style-type: none"> • Toolkit 	<ul style="list-style-type: none"> • The agency/creative team creates application guides and templates for brand communication. A document & digital format guide for use by and for all future marketing communications 	<ul style="list-style-type: none"> • BIA and partner agency 	<ul style="list-style-type: none"> • Short term



13.0 Planning Context

The following statements are presented as information only. Readers of this report are encouraged to contact the City of Hamilton to discuss their individual development or building proposals prior to submitting any applications for consideration and approval.

13.1 Introduction

New development and changes to the use or size of existing buildings is regulated by an Official Plan and a Zoning By-law in Ontario municipalities. The Official Plan sets the general goals and policies for development. It is intended to ensure that future development appropriately balances the community's social, economic and environmental interests.

The Zoning By-law implements the policies contained in the Official Plan by regulating the use of land and how each property in the city can be used. More specifically, it regulates:

- the types of uses that can take place on a property,
- where buildings and structures can locate on a property,
- the lot sizes and dimensions, parking requirements, building heights, setbacks from the street and other such regulations.

Development may also be regulated by additional guidelines and review processes to preserve an area's heritage, natural features or to help achieve community objectives such as environmental sustainability, enhancing an aesthetic character, etc.

When a new regulation comes into effect after a property has been developed, the existing use and structure is allowed to continue to operate even if it does not comply with the new regulations (called a "legal non-conforming use"). However, it is required to comply if redeveloped. The Plan and Zoning By-law recognizes many existing uses that don't conform to the new policies and regulations through site-specific exceptions so that they can avoid "non-conforming" status and expand and alter their buildings without additional review (for example, existing drive-through businesses might be given site-specific exceptions in C5a zones so that they can alter their buildings and sell to other similar operators).

Hamilton completed a comprehensive review of its Official Plan and Zoning By-law policies for Commercial and Mixed-Use Areas in 2017. The Official Plan policies and associated Zoning By-law amendments (By-laws 17-239 and 17-240 respectively) were adopted by City Council in October 2017. The Amendments are not yet fully in effect since some



objections about the new regulations were received. These will be reviewed and considered in the coming months, and if the City is unable to resolve the issues they raise an Ontario Municipal Boarding Hearing will be scheduled.

This creates some technical complications for development in the interim. Both the current Official Plan and the Official Plan Amendment are reviewed when development applications are received. The specifics of any given situation will influence the process that is followed by the City of Hamilton. As a general guide, development proposals that conform to the new policies but not to the old usually need to apply for amendments to the existing regulations but are likely to have the City's support in doing so. Proposals that conform to the old policies but not the new ones are generally required to comply so as to avoid creating a future "legal non-conforming" status.

In the interests of simplicity, the following summary only discusses the Official Plan and Zoning By-law as adopted by City Council in October 2017.

The following is a summary of the planning context for the BIA for the purposes of general information only. For example, the many property-specific exceptions to the general regulations are not provided. Anyone wanting to know the detailed regulations impacting the development of a specific property are encouraged to contact the City of Hamilton before proceeding with planning building alterations, new development, leasing or purchasing property, etc.

13.2 Official Plan and Zoning By-law Designations for Barton Village BIA

Hamilton's Official Plan designates most of the Barton Village BIA a "Mixed Use - Medium Density Area" (the only exceptions are the Hospital site at Wellington which is designated "Institution" and the fire station site at Wentworth which is designated "Neighbourhood"). This designation permits a full range of retail, service commercial, entertainment and residential accommodation at a moderate scale. The areas are intended to serve the surrounding community and to evolve and intensify into mixed use, pedestrian oriented areas (Section 4.6 of the Plan). The Plan's policies for Mixed Use – Medium Density Areas are implemented by C5 zoning.

Barton Village between Wellington and Sherman also is designated as a "Pedestrian Focus Street" which layers on additional policies to better ensure a comfortable, active and visually stimulating walking environment intended to support and reinforce their success as shopping districts. (Section 4.3 of the Plan). These policies are implemented by C5a zoning.



The Zoning By-law differentiates between the blocks east and west of Wentworth:

- C5a zoning is applied west of Wentworth to Wellington, implementing the policies for a Pedestrian Focus Street.
- C5 zoning is applied east of Wentworth to Sherman.

As is described below, C5a zoning permits a more limited range of uses, especially on the ground floor, to support a pedestrian-friendly streetscape. The blocks east of Wentworth currently have less intensive retail and commercial activity. While it is the Official Plan's objective that they become more intensive and pedestrian-friendly shopping environments in the future, a full range of C5 uses are permitted to provide more options for tenancy and avoid vacancies that might result from more restrictive zoning.

13.3 Permitted and Restricted Land Uses

The Mixed Use – Medium Density Area designation and C5 zoning permit a wide range of commercial, institutional and residential uses except for garden centres (unless an accessory use) and vehicle dealerships. The maximum size for microbreweries is 700 square meters and for office buildings 10,000 square meters.

The Pedestrian Focus Street Designation and C5a zoning limits uses considered to interfere with the objective of creating an inviting pedestrian environment. In addition to the limits in C5 zoning:

- Dwelling units, day nurseries and places of worship are only permitted on the upper floors of buildings (not on the ground floor),
- Beverage making establishments, catering services, commercial entertainment, commercial recreation, and microbreweries are only permitted on the ground floor (not on the upper floors),
- Motor vehicle gas bars and service stations, drive-through businesses, studios, tradesperson's shops, transportation depots, and commercial parking facilities unless wholly contained on the upper and below grade floors of a building are not permitted,
- The maximum gross floor area for office and commercial recreation uses is 2,500 square meters.

The Official Plan's Pedestrian Focus Street Designation includes additional guidelines to be used in the development approval process and when considering rezoning applications:

- While gas bars and car washes are prohibited, drive-through businesses may be permitted if it can be shown that they can't be located in other Mixed Use – Medium Density areas. It must be demonstrated that it doesn't preclude the creation of a comfortable, active and visually stimulating walking and shopping environment and a streetscape with buildings and storefronts oriented to the street. (Section 4.6.29).
- Residential uses are permitted at grade (through a rezoning process).



- Large single use buildings over 5,000 square meters are encouraged to locate in the rear or interior of the site with smaller foot print buildings located close to the sidewalk. Alternatively, larger stores may be located up to the streetline provided they are lined with smaller stores, multiple entrances or other similar means to animate the streetscape (4.6.21).

13.4 Height, Built-form, and Design

The Zoning By-law specifies a minimum height of 7.5 meters (2 storeys) and a maximum height of 22 meters (6 storeys) in both C5 and C5a areas. The Official Plan permits heights up to 8 storeys through a zoning by-law amendment provided that the structures are stepped back from adjacent properties and the street and don't have adverse shadow impacts on adjacent residential uses (see 4.6.8 for detail).

In C5 areas:

- Ground floor residential units must be setback from the street at least 3 meters,
- The maximum setback is 4.5 meters,
- New buildings must have ground floor facades at least equal to 40% of the lot width and on corner lots at least 50% of the combined lot widths. Parking or aisles/stacking lanes are not permitted between the building façade and the sidewalk. At least 1 principal entrance is required within the ground floor façade and be directly accessible from the sidewalk.

In C5a areas:

- The maximum setback from the street is 3.0 meters. There is no minimum setback.
- New buildings must have ground floor facades at least equal to 75% of the lot width and on corner lots at least 50% of the combined lot widths. Parking or aisles/stacking lanes are not permitted between the building façade and the sidewalk. At least 1 principal entrance is required within the ground floor façade that is directly accessible from the sidewalk.
- A minimum of 60% of the area of the ground floor façade facing the street must be composed of windows and doors.

The Official Plan indicates that in areas that don't have a secondary plan (which is the case for the Barillage BIA), development applications must include a concept plan that addresses how (i) the creation of a vibrant people place is being achieved, (ii) the pedestrian experience is being improved in the public and private realm, and (iii) the property will intensify over time (4.6.23). Barton Street does have Urban Design Guidelines for its Façade Improvement Grant Program which provides guidance as to the City's objectives for the public and private realm.



13.5 Parking Requirements

New development or change of use in the Barton Village BIA is required to meet parking requirements that are specified in the Zoning By-law. The required parking spaces are to be provided on the same site. Where this is not physically possible, an agreement can be entered into with another property within 300 m. to supply the required parking or the developer can apply to the City to make a cash payment in lieu of parking. These funds are used by the City to build collective public parking lots.

The parking schedule is quite detailed and specific for different uses (See Section 5.6(c) of By-law 05-200). The By-law amendment passed by Council in October 2017 but which is not yet fully in force (By-law 17-240) significantly reduces or eliminates the requirements for many uses in C5 and C5a Zones. A few examples are:



Parking Requirements for Barton Village BIA

	Current By-law	Amendment 17-240
Multi-residential with 1 – 14 Units	0.3 spaces per unit for units 50 m ² or less 1 space per unit for units larger than 50 m ² .	0.3 spaces per unit for units 50 m ² or less 0.7 spaces per unit for units larger than 50 m ² . A maximum of 1.25 spaces per unit is permitted.
Retail uses	1 space per 20 m ²	0 spaces for first 450 m ² 1 space per 17 m ² of space between 450 and 4000 m ² .
Personal Services	1 space per 16 m ²	0 spaces for first 450 m ² 1 space per 16 m ² above 450 m ²
Offices	1 space per 30 m ²	0 spaces for first 450 m ² 1 space per 30 m ² above 450 m ²
Restaurants	1 space per 8 m ² and for take-out restaurants, at least 3 spaces	No change

By-law 17-240 also requires 5 short term bicycle parking spaces per unit for many types of commercial uses in C5 and C5a districts and a requirement for long term spaces in new buildings or additions. It includes an additional incentive for providing long term bicycle parking spaces by permitting a reduction of 1 vehicle parking space for every 5 long term bicycle spaces that are provided (reduction is capped at 10% of the vehicle parking requirement). In addition, vehicle parking can be reduced by 1 space for every 15 m² of locker, change room or shower facilities that is specifically accessible to the users of the long-term bicycle parking (refer to Sections 5.10, 5.11 and 5.12(g) for specific details).



13.6 On Street Patio Program

Restaurants in BIAs can apply to the City for permits to locate outdoor patios in on-street parking spaces from May 1 to October 31 each year. The application process is annual and permission limited to one year. Each on-street patio location is limited to occupying one parking space. The BIA must endorse the application in writing. Each BIA has the right to limit the number of on-street patios in its area.



14.0 Trends

Trends are based on three overarching themes:

- Retailer and commercial business trends
- Food service trends
- Consumer trends
- Organization and governance
- Healthy main streets

RETAILER AND COMMERCIAL BUSINESS TRENDS

Omni-channel

The evolution of retail has shifted from traditional bricks and mortar retailing to a full spectrum of consumer-oriented, anytime anyplace type shopping. Omni-channel refers to the fact that all channels of moving goods and services to the customer are available. This may include a consumer researching a product in the store and buying online or vice versa. It may mean a consumer who goes into a store and is able to purchase the item from a mobile device and have it delivered to their home. It is a whole myriad of combinations and permutations related to the customer journey.

The implications include a re-assessment of the value of physical businesses referred to as bricks and mortar stores as part of a greater review of their role towards impacting potential sales. No longer are the sales of the business the true measure of how successful a business is. This makes it difficult to determine the value of the business operation from either an asset perspective or an operational perspective.

In addition, those businesses that are reliant on price and/or selection as their main competitive advantage are the most impacted by the shift to omni-channel retail including online sales. To be competitive, retailers need to shift to business models that are (1) more experience oriented, are (2) geared to social gathering and building community, (placemaking), are (3) engagement oriented and deliver personal service above and beyond the norm or are (4) convenience oriented.

Retailers and commercial businesses that have only one competitive advantage such as price are more vulnerable to change. There needs to be a multiple role or function of the retail and commercial space for increased immunity to outside pressures such as online retail.



At present, the online shopping channel is doing very well at competing on price and selection but having difficulty competing on experience, convenience, placemaking/community building, and engagement. For this reason, many main streets and downtowns have not been as affected by this shift as power centres. Main streets began to evolve into the experience and placemaking economy several years ago.

Still, most Downtown and main street commercial bricks and mortar businesses need to re-align themselves and think of their business from an omni-channel perspective. This requires an assessment of hours of operation, customer service, delivery, having an online presence, etc.

Smaller Retail Formats

The pressure on larger format stores due to online retail and omni channel has resulted in larger retailers re-assessing the size of their stores, their productivity, and the need to move into more urban centres in order to be adjacent to where the residential growth is occurring.

Many retailers are becoming showrooms and do not need a fully stocked back room full of inventory or merchandise. These businesses are nimbler and increasing productivity while keeping expenses such as rent low.

In addition, larger format retailers are re-assessing their need for large parking areas. Many power centres are assessing alternatives for increased density on their lots through less parking. An issue could be that some retailers have signed specific lease clauses whereby the landlord needs to maintain a minimum parking threshold.

Mobile

Along with omni-channel, the growing trend is for mobile commerce including delivery such as Uber Eats and other food delivery channels, repair professionals who will come to the consumer, among other highly mobile and fluid shopping for goods and services. This is matched by the growing presence of automated vehicles (self-driving). The vehicles will not only change the need for parking but will change how goods are delivered and shipped to consumers.

Solid Retail Principles Still are Key

Despite all these changes, businesses need to have a solid business plan, there is a need to fill a gap or opportunity in the marketplace, and to spur innovation and competition. The basic tenants of supply and demand are still paramount for a business despite the changes in the customer journey or delivery mechanism chosen.



Technology Driven Innovation

Apart from the other trends, a review of the three-major technology driven innovations affecting society should be noted. The three innovations include:

- Sensor based technology
- Big data
- Online

Sensor Based Technology

This includes all aspects of sensors used to make people's lives better. It includes autonomous driving vehicles, refrigerators that tell the household when they are low on grocery items, beacons on the street that notify potential customers that their favourite hot latte would be available for them at the next store in 2 minutes if they just push the buy button on their smart phone now. Sensors, beacons, and transmitting devices are used to even help streetscape and landscape planners for snow melting sidewalks, etc.

Big Data

Businesses such as Google, Facebook and others are collecting data on consumers and making predictive models for how they will behave. In fact, they are attempting to anticipate what potential consumers want event before they know they want it.

Online

Businesses such as Amazon have invested heavily in online applications. This extends far beyond just shopping but includes programs such as Uber, AirBNB, and other online applications that deliver better services to consumers. These three technology driven innovations are not mutually exclusive and we are seeing combinations of the three

FOOD SERVICE TRENDS

Restaurant and bar developers with good instincts will identify where reasonable residential rents are available to individuals who prefer to focus disposable income on social and entertainment endeavours. Established restaurant and bar operators will go to those cities and commercial districts and use their generative market positions to attract patrons from outside the immediate area. In addition, these types of businesses typically like to co-locate creating a competitive by complementary restaurant environment that feeds off one another and helps to create a sense of place.



In some instances, traditional commodity goods have reduced their presence on main streets whereas convenience, food service, entertainment, and fresh products have increased. Restaurants and bars offer the convenience of prepared food and temporary 'living' space as well as being considered a form of entertainment.

Examples of Neighbourhood Food Driven Successful Concepts

The following strategies or products have been successful in enabling neighbourhoods to offer a variety of prepared foods and create a buzz with limited impact on storefront retail availability.

- | | |
|-------------|---|
| Food Trucks | Designated licenses, rotating parking spots and 'rally times', all allow Downtown and main streets to extend its food offerings while maintaining strict regulation of operating times, product mix and controlling demand on bricks and mortar for similar products. |
| Food Halls | Food halls are developing in Downtowns and neighbourhoods. These facilities are usually in the range of 800 m ² – 2000 m ² and offer 6-12 food concepts side by side with traditional grocery or boutique retail. These facilities often are licensed and operate from morning to late evening. Even though the hall may offer a number of concepts, the most successful business model leans towards owner operated or a small number of entrepreneurs each operating multiple concepts in the food hall. |
| Pop up | The concepts described above all offer platforms for 'Pop Up' foodservice. The 'Pop Up' retail sector is usually designed for short term occupancy of properties in an interim transition of long term tenants. Food safety and health standards limit the opportunities for true 'Pop Up' food operations to product prepared elsewhere and sold at the 'Pop Up' site. Although this model may be part of a Downtown or main street environment, it does not generally contribute to the long-term establishment of a vibrant retail centre. |

As demand for local and personal food offerings increases and as local resident lifestyles evolve, the following concepts are emerging which fill store front retail spaces, support the Downtown or main street vibe.

Chef Driven Restaurants: The past twenty years have seen the establishment of many culinary education facilities across Canada producing many capable chefs. These chefs are shedding the traditional model of working for large hospitality providers or traditional restaurateurs and instead are establishing smaller craft operations which focus on partnering with small food producers, paying fair wages to kitchen staff



and being an integral part of the neighbourhood culture and economy. This is a model which provides variety, stability, comfort, and uniqueness to neighbourhoods.

Breakfast / Bakery / Pastry / Coffees and Cafes: An element of Downtown and main street revitalization is the current workforce embracing non-traditional office, business, and employment models. More of today's professionals are mixing living and business space as well as work and leisure schedules. This allows for more revenue or compensation to be invested in urban residential spaces instead of traditional commercial spaces. This emerging lifestyle driven business model moves away from the traditional 9-5 working model and the retail models which support them. These professionals or similar entrepreneurs design their own work schedules and create or determine their own meeting and work spaces. Some current indicators of this transition are the growth in breakfast focused restaurants, bakery and pastry outlets which provide food at all hours of the day and specialized coffee offerings. Pastry in the morning and all-day breakfast are the new norm.



Examples of Hybrid Concepts – Blended formats

As food and entertainment continue to be established as the draw or anchor of retail operations or clusters, some retailers of traditional services or goods have integrated an element of foodservice into their shops. This cross over, ancillary, or hybrid type of concept presents an additional element of foodservice density in retail clusters.

Specialty Food Shops with Eating and Drinking: Traditional specialty food shops such as butchers, cheese shops, and small grocers have expanded into prepared foods. Some are traditional such as selling rotisserie chicken at a butcher shop or sandwiches from a cheese shop. The recent change is these shops have expanded into offering complementary dishes to create full meals and have frequently added seating or stand up eating areas into the shop. Many shops offering dietary specialties such as Plant Butchery or Gluten Free / Vegan Friendly Bakeries offer limited seating or food packaged as ready to eat. Grocery stores are now adding more prepared foods, take away, eat-in, cafes, and even alcohol service at their cafes.

Retail or Service with Bar or Café: Creating a reason to linger or acceptance of a wait time is the primary goal of traditional retail introducing food and beverage within their shops. This can be found in recent personal grooming shops which have added an alcohol service or fashion or art shops which have added espresso machines and a pastry case. Like the food shops described above, these shops provide areas to relax while enjoying the hospitality of the retailer as well as increasing dwell time, fully integrating their product offering with food and entertainment to create comprehensive consumer experiences.

Nutrition Health, Smoothie Bar with Protein Alternatives: Retail and food service have also collided with health food stores going from passive product sales to full health counselling and the provision of prepared food to match prescribed programs or to meet consumers healthy expectations. This active role can include fresh juice or smoothie components as well as offering prepared foods which can be take away or consumed at the store.

Cannabis Culinary: Although many aspects of how the 'weed' industry will grow and the regulation and distribution of 'value added' products are to be determined, the movement of Cannabis Culinary is growing and recognized as a natural evolution of normalizing legal cannabis use in the Canadian society. This portion of the emerging weed retail sector will most likely be addressed in a similar fashion to current alcohol licensing and zoning.



CONSUMERS CHANGES

Buy Low Buy High

It used to be that women primarily would shop for some higher quality items and mix and match with value conscious retailing. Today, both men and women shop for some higher quality pieces that they match with basic items.

Food Shopping Throughout the Week

The big weekly shop is less relevant in urban settings. Shoppers will buy fresher and buy more often in smaller batches. This is matched by an increase in home meal replacement shopping.

Demographics Are Destiny

Analyzing the future local area demographic patterns for a main street area are key to uncovering what opportunities lie ahead for businesses. The growing Millennial age cohort will not stay 28 forever. This age group will age, they will get better jobs, they will marry and have children. As a result, we will see a shift from businesses catering to a youthful demographic to one focused on career advancement and early family formation. The retiring Baby Boomer generation will cause stress on those businesses that have catered to them over the years as this group moves into a buying phase that is less focused on clothing and career and more on experiences and travel. The next generation, the Generation Z is a smaller generation and businesses will see less demand for urban housing and eating out.

Mediocrity Won't Cut It

Google Canada indicated that consumers researching businesses use the word "best" in two-thirds of all searches. In addition, they are also researching the location of these businesses. Second, best will not cut it. Retailers and Downtowns need to focus on being the best at certain things, increased specialization and having a business that has a narrow and deep retail or commercial focus.

ORGANIZATION AND GOVERNANCE

Leadership is King

As the saying goes, 90% of life is showing up. Investing in main street leadership pays off. The relationship building and partnership return on investment illustrates that more can be accomplished through positive leadership than if one person is trying to do it all. Leadership payoff results in a multiplier effect that can take one dollar of investment or one hour of



resource time and transform it into more than one. Façade improvement programs and streetscaping cost sharing are key examples whereby one dollar of private sector money is matched by the municipality and/or other fundraising or sponsorship or grant monies to produce much greater results than would be if the programs were not in place.

Capacity Building and Return on Investment of BIAs in Their Community

Based on research conducted for the Return on Investment of Business Improvement Districts carried out by Three Sixty Collective, the following key findings were developed and applicable to Hamilton BIA's leadership organizations.

- **Engagement:** Downtown's or a main street organization's top priority is to achieve greater membership engagement. It is also one of the top successes they have achieved in the past five years. To achieve greater membership engagement success, organizations in urban renewal had to apply innovative engagement skills to encourage participation. This could take the form of a guaranteed return call policy, changing BIA reporting forms to match the City's forms, municipalities supplying BIAs with office space, online polling by BIA membership, and communicating success stories.
 - Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. Developing innovative BIA programs needs to have the support of the membership. This includes factors such as leadership, staffing, active board members, communication, and active volunteers.
 - Engagement successes are related to three factors: (1) relationship building, (2) capacity building, and (3) social capital investment. Using the saying "through many hands comes light work" the BIA is able to leverage good working relationships to the benefit of the members. This is key for smaller BIAs and BIAs located in smaller communities.
 - Other key successes are centred around key programmings such as events, marketing, beautification, and fostering a business mix and new innovative business openings that support the BIA strategic plan. During the interviews, BIAs discussed examples of these programs and pilot type projects in their communities that illustrated how they measured their success. It can be argued that events and marketing are related to demand side economic development and beautification and business mix are related to supply side economic development. An understanding of how events, recruitment, beautification can support economic development is a major breakthrough.
 - Finally, a key to success is having a Strategic Plan that is realistic, achievable within a four to five-year time frame, and designates responsibility.
- **BIA Relevance:** BIAs need to constantly challenge themselves to prove through measurement indicators that they are relevant, important, and necessary to telling the BIA success story. This story must be shared at all levels of government and their membership.
- **Uniqueness:** A BIA should be recognized as unique and should not be forced into a one-size-fits-all approach. The



Return on Investment indicators chosen by the BIA should provide each BIA with the tools needed to share their story, and their success, without attempting to sterilize the unique nature of each business district. With that, there are still common threads of success regardless of a BIA's own competitive positioning. It is the consistent measurement of these threads that will build a collective understanding of the role BIAs are playing in their communities. These threads include measuring tangible signs such as business resiliency including vacancy, business longevity, and business mix.

- **Governance Model:** BIA governance model is being tested and pushed into different directions that challenge the traditional norms of BIAs only working on beautification and marketing. There is emerging a vast array of unique successes that BIAs have achieved through pushing the limits of what the governance model allows. This has been in the areas of economic development, unique partnerships, fundraising for programs, championing density, etc. Organizations have developed parking programs and own parking lots, others have hired planners to challenge density heights, others have conducted economic impact studies on behalf of development to encourage greater density, others have partnered with the municipality to fundraise for a \$6 million urban plaza redevelopment, among others.
- **Economic Drivers and Community Builders:** Some BIAs are able to see the greater importance of their advocacy, marketing, and facilitator components to create greater economic development and community building within their BIAs and in their areas of influence surrounding the BIA.
- **Priorities of a BIA:** The priorities of each BIA should be different. There is not one path towards the improvement of the BIA area. Rather, BIA should customize their measurement tools as set out in each BIA's Strategic Plan. The Strategic Plan will guide the business mix, the programming, and community engagement efforts. It is essential to note that community engagement is an over-arching element of all of the overall activities and programs carried out by BIAs.
- **Partnerships and Communication Matters:** At present, many Downtowns and main streets with smaller membership sizes (under 200 members) and in smaller communities (under 50,000 people) are more reliant on creating partnerships and having to create better communications vehicles to different audience members to build support compared to larger BIAs. However, it is also true that BIAs that have developed a highly specialized business mix in traditional retail or in food services have also relied heavily on developing a broad range of partnerships through excellent communication on their successes. Partnerships between municipalities and BIA varies. However, as a general rule, the stronger the municipal partnership, the greater awareness of the BIAs role in the community, results in greater success.

Determining Issues That are Symptoms of Greater Problems

- Parking, hours of operation, and other hot button topics are often difficult to address. At first, it is important to understand that often these issues are tactical issues and are symptoms of a greater issue. If sales were strong then parking availability may be less an issue. Peer pressure should be used to combat hours of operation issues. However,



focusing on good business economics should remain the focus rather than constantly going down the rabbit hole of these issues such as parking and hours of operation.

PHYSICAL DESIGN

Universal Principles of Good Physical Design

Before commercial will thrive, the area must work for day-time activities and night-time activities, including residential, employment, and other day time or night time activities. The most basic characteristics include:

1. Safety

Retail health depends on the comfort level of customers who will come to the area. The longer a customer spends in an area, the more money they are likely to spend. Both the reality and the perception of safety issues are critical to this comfort level. Illegal activities such as drug dealing or even less offensive activities like graffiti can give the area a bad reputation and discourage customers from coming. The negative psychological effects can be long lasting even when crime in an area is reduced.

2. Cleanliness

The overall cleanliness of an area tends to be an indicator of how much people in the area care about their places. In many customers' minds, lack of cleanliness can indicate lack of safety.

Length of the Main Street Area

Retail commercial main streets should not be too long or too short. A general rule of thumb is that an 800-meter double-loaded retail street can accommodate a good retail mix/composition. However, beyond 1,500 meters it becomes difficult for many consumers to walk comfortably the length of the entire district. If the shopping street is too short, then there may not be enough critical mass of retail to support significant shopping. Consideration should be given, as well, to the creation of nodes at intersections to encourage retail offerings "just around the corner" – hideaway "gems" that lead logically into the community and begin to promote retail depth. In addition, the blocks should be relatively short in length. This has numerous benefits including more corner locations and higher visibility and accessibility. It allows for greater flow of target markets into an area through increased vehicular and walking/biking movement. In addition, the consumer is being constantly encouraged to walk further as the blocks are short and therefore more interesting.



Streetscape

Good streetscape design is critically important to the success of a retail district, as it creates an environment in which the pedestrian (shopper) feels comfortable and safe.

- A wide, high quality, walking surface with attractive treatments is important for pedestrians, both to prevent crowding and to improve the visibility and accessibility of shops.
- 6m to 8m sidewalks at maximum and 4.5m minimum.
- Seating should be placed along the street to provide places to rest and linger.
- Street trees provide interest and shade, for while sun exposure is important, too much sun can create an uncomfortable environment dissuading shoppers from continuing.
- Flowers and shrubs can be used to soften hard surfaces and decorative street lighting and banners can help create a positive, festive environment.

Signage

Downtowns and main streets generally benefit from coordinated streetscape signage/identification programs that serve to “brand” an area as distinctive. Entry signs, branded logos on banners, wayfinding systems, and street furniture tend to reinforce the notion of a retail/shopping precinct of quality and interest. This is part of the specialized retail focus for the area in terms of their vision and brand.

Individual storefronts should have sufficient signage to inform shoppers of their name and services but should not “over sign” to the detriment of the streetscape. The use of blade signs, as done with grace and purpose in cities such as Santa Fe, NM, should be considered to benefit navigation for pedestrians up-and-down a street.

Urban Plazas

Small urban plazas encourage people to linger in a Downtown or main street area. These smaller spaces present an area of respite with a human scale, making them feel comfortable while increasing the opportunity for socializing. They also frame the retail spaces surrounding them better increasing visibility and accessibility. These plazas should be spaced about 400 m to 600 m apart

- These areas can be used for events.
- Smaller plazas and parks may also appear busier and therefore feel safer than larger, emptier spaces, thus encouraging their use.
- Plazas should also be used to create pedestrian pull/push effects. Locating plaza at either end of a retail district encourages this flow. Often a plaza should be located midway as well if the district is long enough to warrant one.



Useable Outdoor Space

Patios are particularly desirable for food service where creative business owners can cater to the customers' desire to be outside. The recent changes to the City's bylaws to encourage and enable more patios as well as outdoor merchandising of space and pop up plazas has been in effect for over one year.

Showcase windows

Retailers are often mandated to provide a minimum of 60% to 70% of their storefront façade as window wall, allowing pedestrians to see the merchandise, window displays and public service announcements rather than blank walls that are more subject to graffiti and general disrepair. That said, retailers must undertake regular and rigorous maintenance.

Loading access

This is more important for retailers of large-scale merchandise or that have larger stores. National brand retailers are likely to use transport trucks for distribution and accommodating this size of delivery vehicle can be problematic in tighter urban spaces. Loading areas, especially those associated with restaurants, are prone to messy or nuisance refuse and should be regularly maintained. Specific loading areas on the main street should be evaluated to determine the number and location.

Garbage collection

The provision of sufficiently sized garbage/recycling storage is a must in the promotion of retail streets. They must be maintained on a regular basis because they will show wear and tear from frequent use. For food services, the location of a cold waste room is very important unless there is constant waste pickup.

Access/egress

Entries should be generous and well situated in order to allow easy access and egress. A well-sized, prominently located entry is also more visible and inviting to shoppers.

Attractiveness

Shop fronts must be attractive and well designed. Materials should be durable and easily maintained, requiring minimal maintenance.

