



Concession Street BIA
Commercial Market Assessment Update

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TABLE OF CONTENTS

1.0	Introduction.....	4
2.0	Visitors to Concession St. BIA.....	5
2.1	Vehicular and Pedestrian Movement Along Concession St. BIA.....	5
2.2	On-Street Parking.....	8
2.3	Pedestrian Traffic.....	9
3.0	Trade Area Analysis.....	13
3.1	Cell Phone Data.....	14
4.0	Trade Area Socio-Economic Review.....	25
4.1	School Enrollment.....	34
4.2	Household Expenditure.....	35
5.0	Other Major Target Markets and Customer Visitation.....	37
5.1	Customer Visitation Data.....	38
6.0	Quality of Life Statistics – Crime Statistics and Housing Prices.....	45
6.1	Crime Statistics.....	45
6.2	Housing Prices.....	46
7.0	Commercial Audit and Rent Review.....	47
7.1	Changes in Concession St. BIA Businesses from 2009 to 2016.....	51
7.2	Concession St. Area Retail Rents.....	58
8.0	Investment in Concession St. BIA.....	61
9.0	Key Person Interviews.....	65
9.1	Concession Street Key Person Interviews - SWOT.....	65
10.0	Strengths Weakness, Opportunities, and Threats.....	74
10.1	Comparison to Previous Commercial Market Assessment.....	76
11.0	Concession St. BIA Vision.....	77
12.0	Action Plan.....	79
12.1	Organization and Governance.....	80
12.2	Economic Development.....	82



13.3	Physical Improvements	86
13.4	Marketing SWOT.....	90
13.5	Marketing – Website and Social Media Review	91
13.6	Marketing Recommendations.....	96
14.0	Planning Context – Concession St. BIA.....	97
14.1	Introduction	97
14.2	Official Plan	97
14.3	Zoning By-law.....	99
14.4	On Street Patio Program.....	102
15.0	Trends.....	103
	Appendix: BIA Marketing Planning - CHECKLIST.....	107



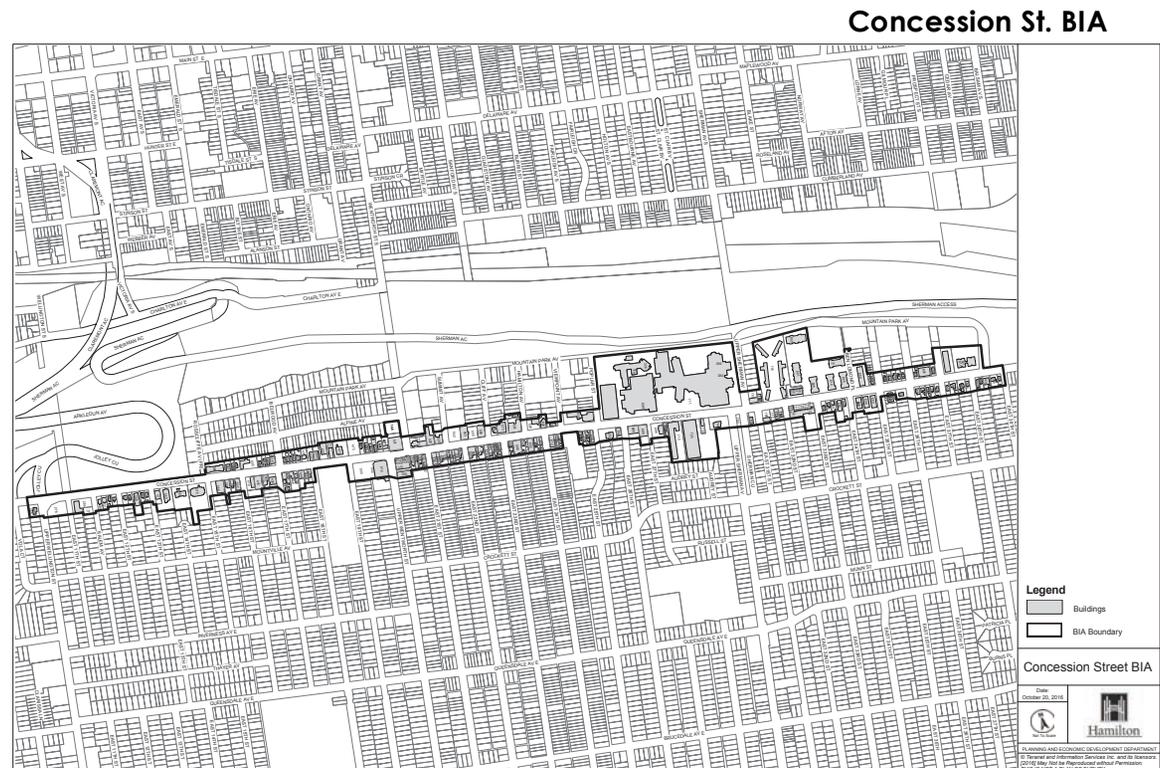
1.0 Introduction

Three Sixty Collective was retained by the City of Hamilton (City) to undertake an update to the Concession St. BIA (BIA) Commercial Market Assessment. The previous update was conducted in 2009/2010. The study process included a thorough review of the demand and supply characteristics of the BIA in order to provide strategic direction for new action items.

The process included:

- Movement to and within the BIA including visitation
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, City staff and councillors
- Trade area review including visitor profile using cell phone data
- 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 that was then reviewed with BIA members at an open workshop. After the workshop a vision confirmation and action plan was produced to assist the BIA and City to move forward with their planning initiatives. The complete report is included here.





2.0 Visitors to Concession St. BIA

To understand the commercial market opportunities for Concession St. BIA, a review of visitor movement and origin data was undertaken. This included five major reviews:

- Vehicular movements along Concession St.
- On-street parking
- Pedestrian intersection volumes and movements
- Observational data
- Key person interviews with retailers

2.1 Vehicular and Pedestrian Movement Along Concession St. BIA

Vehicular and Pedestrian Volume 8 Hour Counts at Key Intersections along Concession St. BIA

<u>Intersection</u>	<u>Date</u>	<u>7-hour Vehicular Count</u>	<u>7-Hour Pedestrian Count</u>	<u>8-hour Vehicular Count</u>	<u>8-Hour Pedestrian Count</u>
Concession St. and Upper Wellington St.	Fri. Oct. 17 2014	13,901	195	n/a	n/a
Concession St. and Upper Wentworth St.	Fri. Oct. 21 2016	8,080	542	9,061	646*
Concession St. and East 22nd St.	Tues. Oct. 25 2016	5,660	634	6,355	693
Concession St. and Upper Sherman Ave.	Wed. Apr. 9 2014	5,274	691	n/a	n/a
Concession St. and Upper Gage St.	Mon. Oct. 24 2016	4,994	55	5,612	67

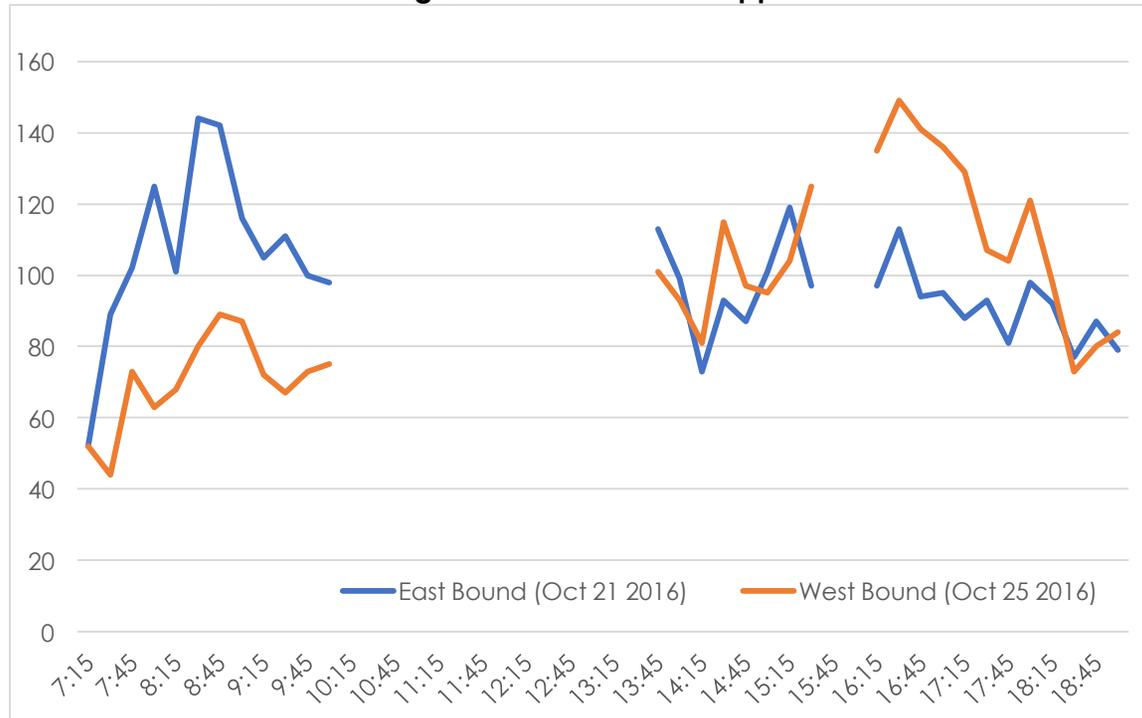
Source: *City of Hamilton*

*Due to the T-Intersection configuration at Upper Wentworth St, the actual pedestrian count is under-estimated. 360 Collective estimates the 8-hour pedestrian count to be closer to 1,100

Focusing on movement directly on Concession St. the following graph illustrates east-bound and west-bound vehicular traffic along Concession St. from Upper Wentworth St. to East 22nd St.



Vehicular Traffic Patterns Along Concession St. and Upper Wentworth and East 22nd St.



Source: City of Hamilton

Findings for Concession St. BIA

- Vehicular traffic along Concession St. has a defined morning and evening commute pattern.
- Traffic flows spike east bound in the morning and spikes west bound in the late afternoon/early evening.
- Traffic does not abruptly end in the early evening but is sustained past 7:00 pm.



Implications for Concession St. BIA

- Concession St. is a central and accessible area for both Mountain and Lower City residents.
- The Juravinski Hospital and Cancer Centre (hospital) is a main contributor to vehicular traffic from both staff and patients/visitors.
- Access to the Lower City and employment areas contributes to the flow of traffic.



2.2 On-Street Parking

Parking Meter Revenue Concession St. BIA

Year	Number of On-Street Meters	Total Parking Revenue	Revenue Per Meter
2008	139	\$93,245.30	\$670.83
2009	140	\$96,872.74	\$691.95
2010*	140	\$112,432.13	\$803.09
2011	140	\$125,997.86	\$899.98
2012	140	\$122,470.31	\$874.79
2013	140	\$119,699.27	\$854.99
2014	140	\$119,883.62	\$888.03
2015**	135	\$62,290.76	\$461.41

Source: City of Hamilton

*In 2010, parking rates increased from \$0.50 to \$1.00.

** The street was under construction from Feb. 2015 to Nov. 2015.

Findings

- Overall, parking has been an issue along Concession St. as parking demand from hospital staff and health-related visitors conflicts with local area residents who often want to run quick errands.
- The doubling of parking meter rates in 2010 did not lead to a doubling in revenue as visitors sought out other parking alternatives.
- There are several commercial businesses such as Shoppers Drug Mart, Tim Horton's, Subway, and some plazas that have their own private parking.
- From 2010 to 2014, the parking revenue per meter has remained relatively constant within the \$850 to \$900 range indicating a sustained flow of visitors to Concession St. BIA. The decrease in 2015 was due to the street redevelopment. During the year, on-street parking revenues were approximately half that of previous years.

Implications for Concession St. BIA

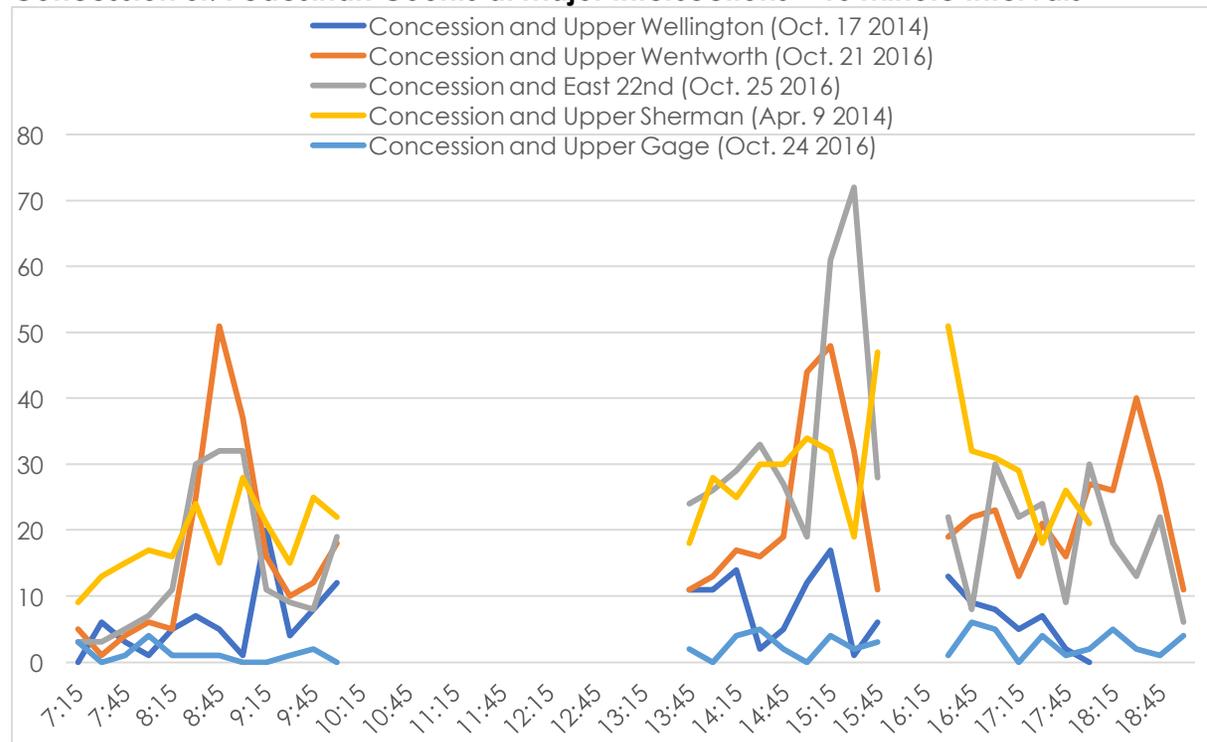
- The length of time that paid parking is in effect during the day is a concern for local residents who want to do quick errands but is contrasted with the need to ensure hospital staff and visitors do not take spots away from shoppers.
- Parking is an ongoing issue but it appears to be less of an issue compared to five years ago.



2.3 Pedestrian Traffic

Average pedestrian traffic at the major intersections is relatively low but is increasing over time.

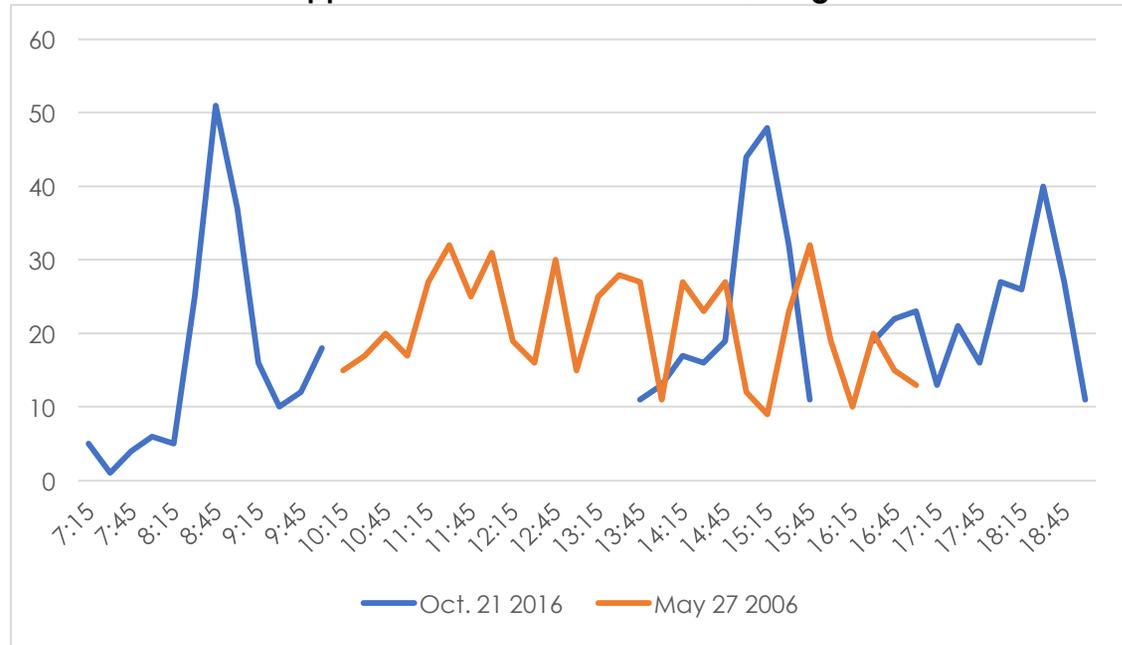
Concession St. Pedestrian Counts at Major Intersections – 15 Minute Intervals



Source: City of Hamilton



Concession St. and Upper Wentworth St. Pedestrian Changes – 2006 to 2016



Source: City of Hamilton

Findings

- Pedestrian volume is relatively low throughout Concession St. but it is increasing over time.
- As noted, the pedestrian volume at Concession St. and Upper Wentworth St. is undercounted due to the T-shaped intersection configuration.
- There are various spikes in pedestrian traffic throughout the day along the street.
- There is a morning commute spike at 8:30 am near Concession St. and Upper Wentworth St. as well as one near East 22nd St. near the RBC bank.
- There is a mid-afternoon spike at 3:00 pm at Concession St. and East 22nd St. as well as Upper Wentworth St. (partially related to the nearby school).
- There is a late afternoon spike at 4:00 pm at Concession St. and Upper Sherman St. (related to the hospital and potential shift work changes).
- There is an early evening spike at 6:30 pm at Concession St. and Upper Wentworth St. that may include places such as bowling, dance, movies, and other recreation centres nearby as well as shopping errands at the Shoppers Drug Mart.

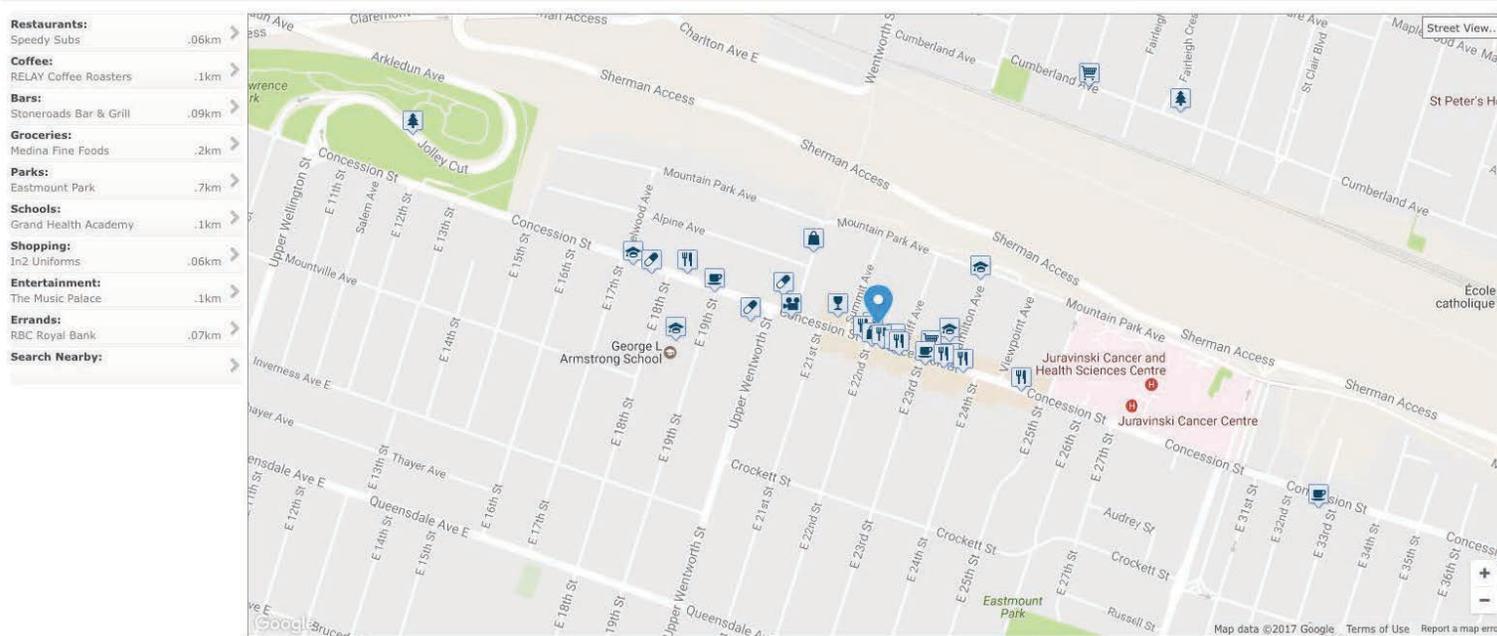


- The Walk Score for the address 555 Concession St. is 81 and the Transit Score is 61. This is an average to good Walk Score for an urban area that is reflective of how accessible Concession St. is to a wide range of goods, services, and amenities including shopping. The Transit Score is relatively lower reflecting the many errands can be done via transit but it is slightly more difficult.



Concession St. BIA Walk Score – Nearby Amenities

What's Nearby



Implications for Concession St. BIA

- Businesses must be nimble and flexible to adjust to the changes in pedestrian and vehicular flows to take advantage of the business opportunities. This may be early morning coffee/tea, or late afternoon and early evening home meal replacement opportunities, etc. Many businesses have responded by creating a variety of business activities throughout the day to increase sales.
- BIA should focus on creating greater shopping synergies amongst businesses.



3.0 Trade Area Analysis

The trade area analysis is affected by three data collection methods:

- Key person interviews
- Observational data
- Cell phone visitor data that correlates postal code data for visitors in the BIA who have one of the company's registered apps and is in the BIA for a minimum of ten minutes

The following section assesses visitor data from cell phone pings over the course of one year.

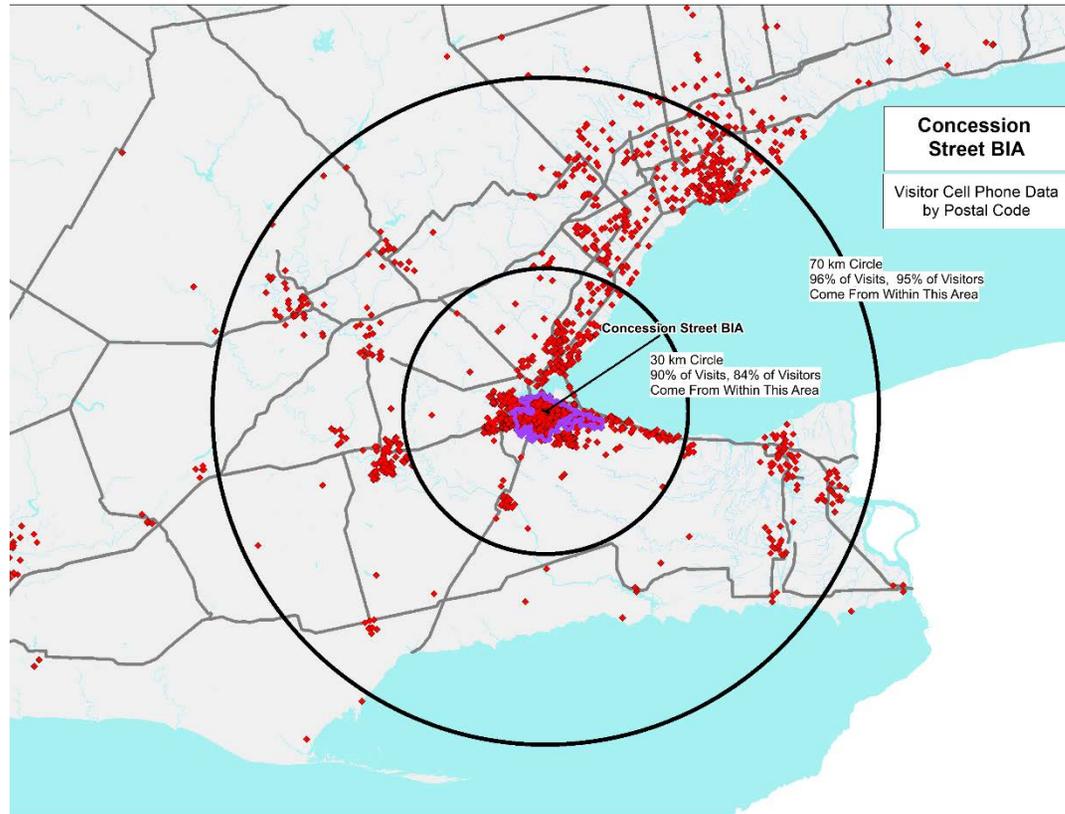


3.1 Cell Phone Data

- Concession St. BIA visitor cell phone ping data was collected from November 2015 to November 2016 (one year) based on visitors that were in Concession St. BIA excluding the hospital area.
- The data was supplied by Uber Media. (not associated with the driving company). Their affiliate, UberRetail, took the data they collected and converted it into location data. Then it goes to a company called BI Spatial that cleaned the data further, adjusting the time stamps to localized dates and times and adding the postal code.
- The data represented a sample of visitors to the Concession St. BIA. The analysis combined with other elements such as observational data, key person interviews, trade area analysis and competitive positioning re-enforced the overall findings.
- The visitors to the Concession St. BIA had to spend more than 10 minutes in the BIA. As a result, commuters and flow-through vehicular traffic were excluded.
- The hospital area was excluded from the collection area to focus primarily on visitors to the street and not hospital staff, patients, or visitors which might skew the data.
- In total, there were 20,117 total visits from the sample of visitors collected over the one year period. Within that sample, 6,105 were unique visitors. The average visitation was 3.3 times/year. However, it is stratified. There is a high number of single visits combined with very high visitation from local area residents.
- The range of home postal codes for the cell phone visitor data was extensive across the Greater Golden Horseshoe.
- This was an early testing stage with Concession St. BIA as well as the four other BIAs in Hamilton that were being reviewed at the same time. The process revealed that the cell phone ping data matches well against the visitor profiles and tended to be an accurate portrayal. As with any sample, it was not 100% of the population, but when this data was combined with key person interviews, observational data, trade area analysis it did tend to re-enforce common findings.



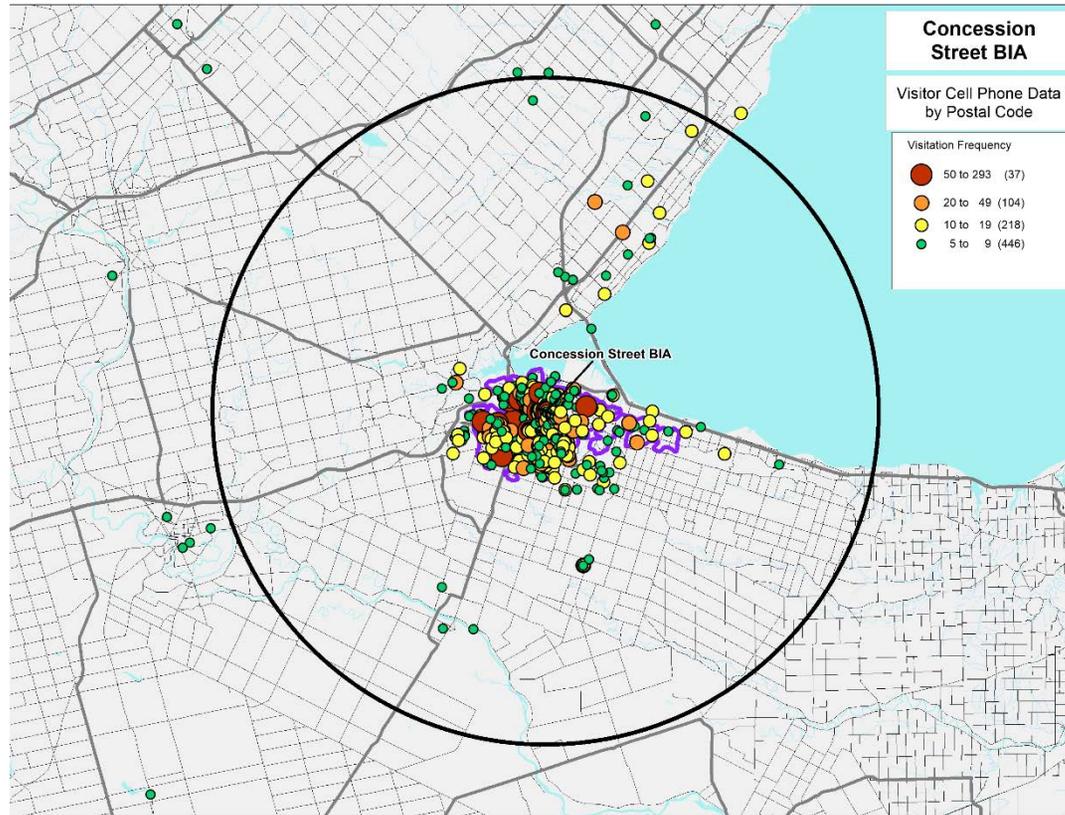
Concession St. BIA Visitor Cell Phone Corresponding Postal Codes – November 2015 to November 2016



Source: GeoMarketing Solutions



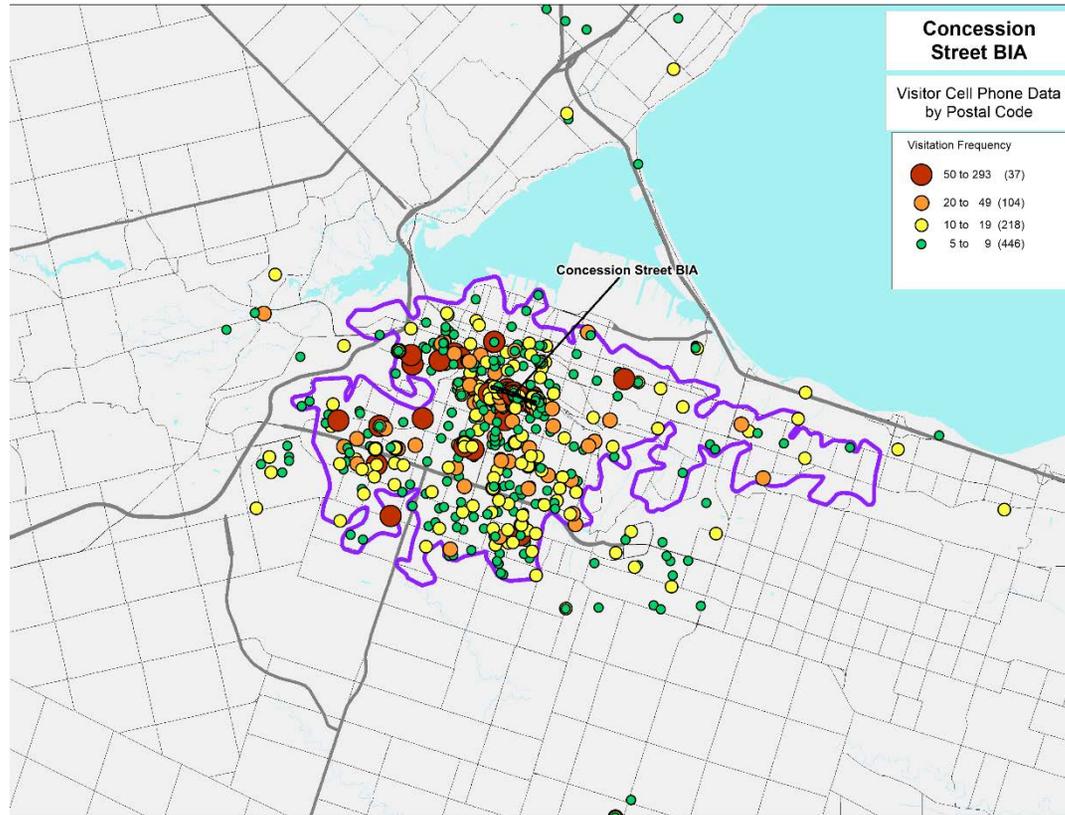
Concession St. BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016



Source: GeoMarketing Solutions – excludes visitors who visited less than five times annually



Concession St. BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016



Source: GeoMarketing Solutions – excludes visitors who visited less than five times annually



Findings

- Note: the map excludes visitation from those who visited less than five times in the past year to focus on loyal customers.
- Visitation is focused on Concession St., (Centremount, Inch Park, Raleigh, Sunninghill), Southwest Mountain (Gurnett, Gourley, Falkirk East, Rolston, Bonnington), Other Mountain including Birdland (Balfour, Burkholme, Macassa, Hampton Heights), and Lower City/Downtown (Durand, Kirkendall, Corktown, Beasley).
- The southwest section of the Mountain near the Lincoln Alexander Expressway and Birdland area have a higher proportion of visible minorities and are attracted to Concession St. for the unique products and services geared to their needs.



Concession St. BIA Sample Visitation Frequency – November 2015 to November 2016 (One Year)

Concession St. BIA	Number of Visitors	Average Distance Travelled	Average Household Income	Median Age	% Some University or Higher
Immediate Trade Area			\$69,495	42.30	17.5%
Visitation Frequency					
Frequent Visitors (100+ visits)	12	1.55	\$82,512	38.28	16.75
All Visitors Less Frequent	6,093	27.15	\$87,823	40.66	22.52
1 Visit	3,746	29.50	\$89,788	40.78	23.07
2 to 5 Visits	1,718	24.91	\$86,159	40.38	21.92
6 to 12 Visits	385	23.49	\$81,046	40.67	21.36
13 to 24 Visits	152	11.68	\$84,747	41.12	20.10
25 to 49 Visits	67	13.18	\$76,507	39.18	20.09
50 to 99 Visits	25	17.35	\$67,165	43.32	21.38
Time of Day					
All Visitors 10 am to 6 pm	3,747	26.67	\$88,498	40.78	22.22
All visitors 6 pm to 9 pm	1,811	24.93	\$84,452	40.47	21.92
Events/Festivals					
Streetfest - Aug 13 2016	78	18.41	\$77,470	39.35	20.29
Returned Visitation after Streetfest	43	26.85	\$81,420	37.46	21.52
Sidewalk Sounds - Visitors 6 pm to 9 pm on May 20, Jun 17, Jul 22, Aug 18, Sep 16 Combined	140	12.47	\$85,682	40.64	23.58
Return Visitation of Sidewalk Sounds after May 20	113	13.75	\$86,457	40.58	22.63
Fall Fest Oct 28	73	17.31	\$92,476	40.03	19.98
Nosh Week Oct 17 to 23	297	13.18	\$84,329	40.50	21.29

Source: Geomarketing Solutions



Findings

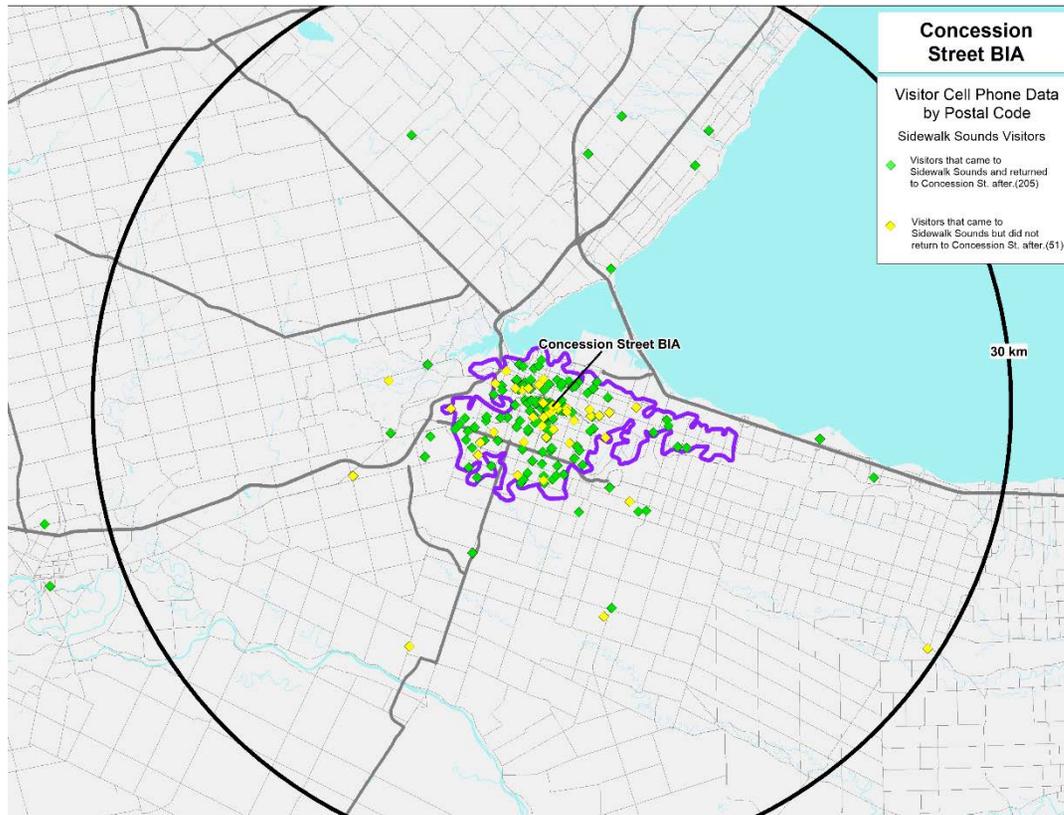
- Visitors to Concession St. BIA have a higher average household income compared to the immediate local neighbourhood.
- Concession St. BIA attracts visitors from a wide geographic range but they are very infrequent visits. 61% of visitors came for only one visit during the year. This may include medical visits, unique shopping/gift shopping, or special events. As a result, guerrilla type marketing tactics need to be used to encourage these visitors to shop elsewhere on the street once they are already there.
- Infrequent visitors travel from an average of 29.5 km, have higher average household incomes, tend to be older, and are more likely to have a university degree or higher compared to other visitors to Concession St. BIA.
- Except for extremely frequent visitors, as visitation frequency increases, the average household income tends to fall, the median age tends to rise, and the probability of having a university degree falls.
- The group that visits once every two months to twice a month is the most valuable demographic group. The target market includes both local and regional visitors. The target market visits approximately the same amount as the “one-visit-only” visitors. This group has medium to high household income. Marketing can be focused on encouraging them to visit more often and/or increasing their dwell time and cross shopping opportunities when they are in the BIA.
- Nighttime visitors tend to be slightly younger compared to other visitors. Their average household income is only slightly lower. In addition, this group is composed of local and regional visitors. This group of younger, sophisticated visitors is a growing target market for Concession St. BIA.
- Daytime visitors tend to have higher household incomes.
- Streetfest attracted a primarily local visitor base. The average household income was lower, median age was lower, and the probability of a university degree was lower for Streetfest visitors compared to other visitors. The average Streetfest visitor is more in line with the local demographics of the surrounding neighbourhoods.
- 55% of Streetfest attendees returned to Concession St. BIA and 45% did not return. However, those visitors who attended Streetfest and then returned to Concession St. later in the year for another visit tended to have a higher household income, lower median age, and higher probability of a university degree compared to those Streetfest visitors who never returned to Concession St. again after Streetfest. A younger, higher income, and more sophisticated audience was enticed to return to Concession St. after attending Streetfest.
- 81% of people in the BIA during Sidewalk Sounds returned to the BIA later in the year. Those who attended the Sidewalk Sounds event days tended to be local, had medium to high household income and had a higher probability of having a university degree compared to other visitors. Similarly, those Sidewalk Sounds visitors who then returned to Concession St. BIA after the events had higher household incomes compared to other Sidewalk Sounds visitors.
- Fallfest attracted both local and regional visitation. The average household income was significantly higher but probability of a university degree was lower compared to other visitors.



- Nosh Week attracted a similar group of local visitors. The number of visitors was significantly higher than average. The average household income was medium to high.

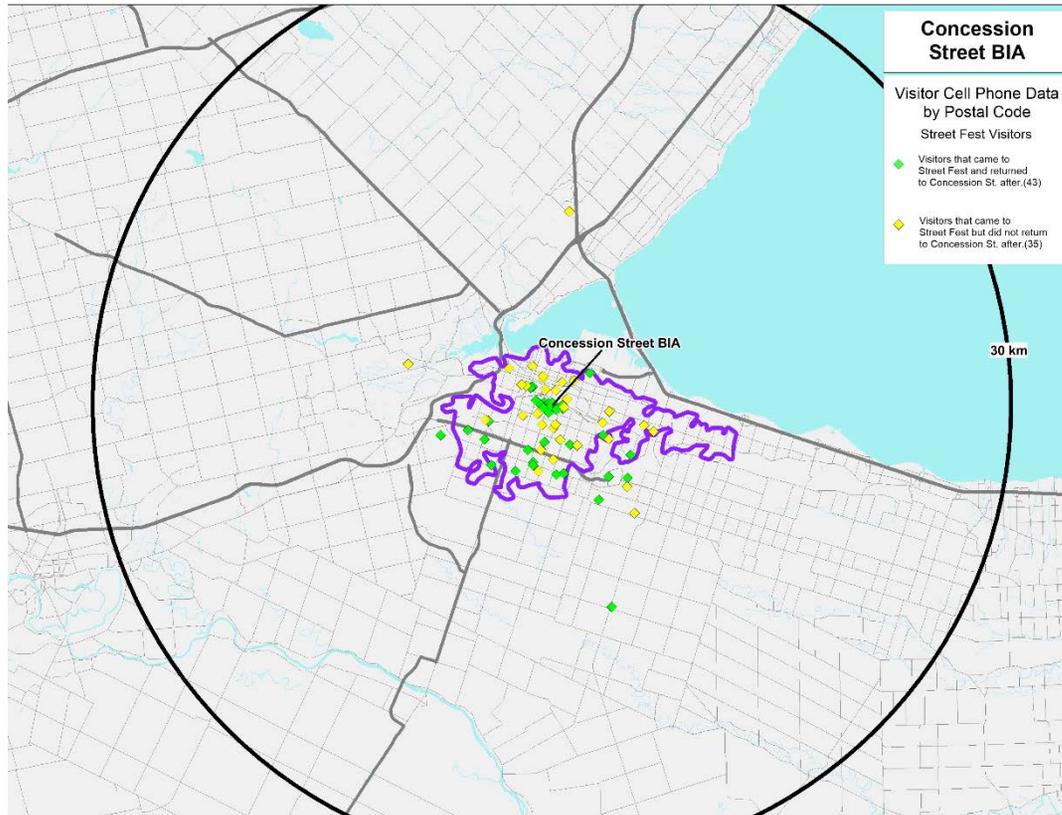
The following two maps illustrate visitors to Sidewalk Sounds and Street Fest and whether the visitor returned after event.

Sidewalk Sounds Visitors – Return and Non-Return



Source: Geomarketing Solutions

Street Fest Visitors – Return and Non-Return



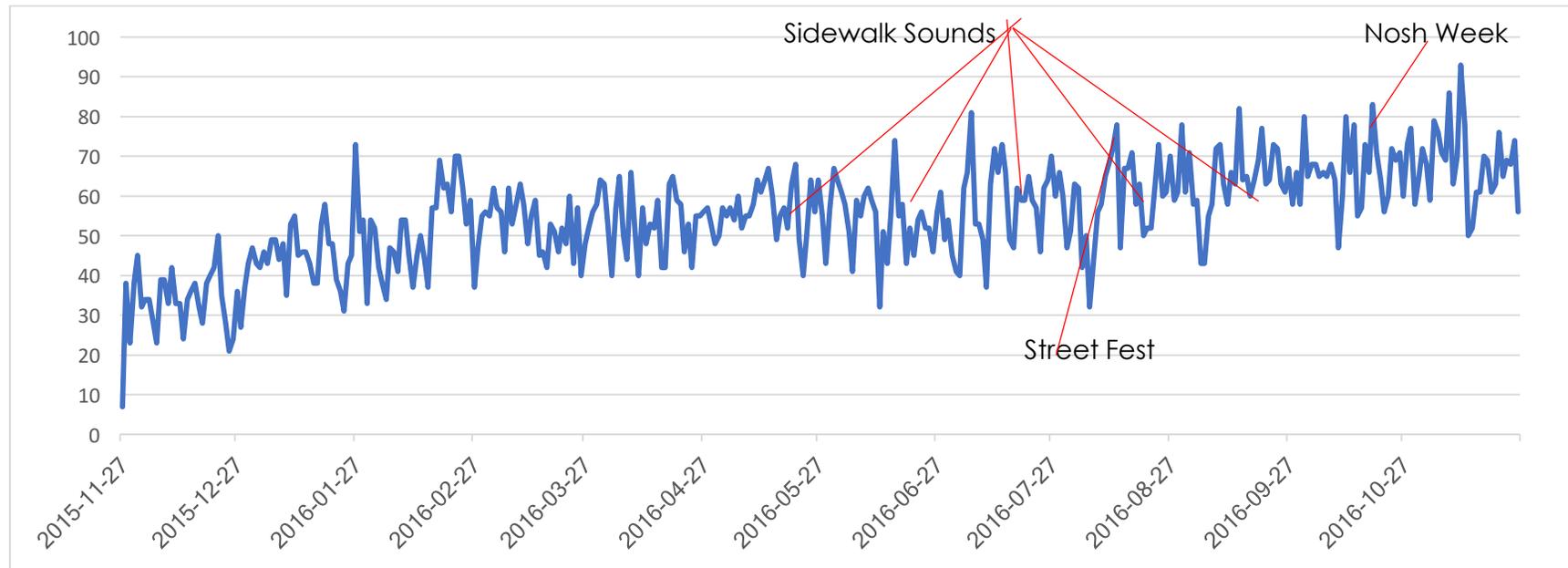
Source: Geomarketing Solutions

Findings

- Those regional visitors to Concession St. BIA during Sidewalk Sounds had a good probability of returning to the BIA after the events.
- For Street Fest, beyond the immediate area surrounding the BIA, visitors to the event did not tend to return. The exception are those visitors who live close to the south end of the City.



Concession St. BIA Visitors by Day of the Year – Sample from November 2015 to November 2016



Findings

- Visitation has increased throughout the entire 2016 year since the street/roadway construction ended.
- The highest spikes in visitor traffic were July 6th (Wed.) Sept 14th (Wed.); Oct. 1st(Sat.); Oct 12th (Wed.); Oct 19th (Wed. – Nosh Week); and Nov 11th (Fri – Remembrance Day). Generally, Weekdays and in particular Wednesdays are high visitation days.
- Sidewalk Sounds contributed to good visitation.
- There was a spike in visitation around Street Fest. However, the week leading up to the festival was low visitation. People who normally would have visited Concession St. BIA probably postponed that visit until the festival.
- There was very good visitation centred around Nosh Week.



Concession St. BIA Visitation – Day of the Week

Day of the Week	Sample of Visitors
Sunday	2,469
Monday	2,872
Tuesday	3,006
Wednesday	3,047
Thursday	2,926
Friday	3,007
Saturday	2,790
Total	20,117

Findings

- Wednesday has the most number of visitors. However, Tuesday, Wednesday, and Friday have very high visitation.

Implications for Concession St. BIA

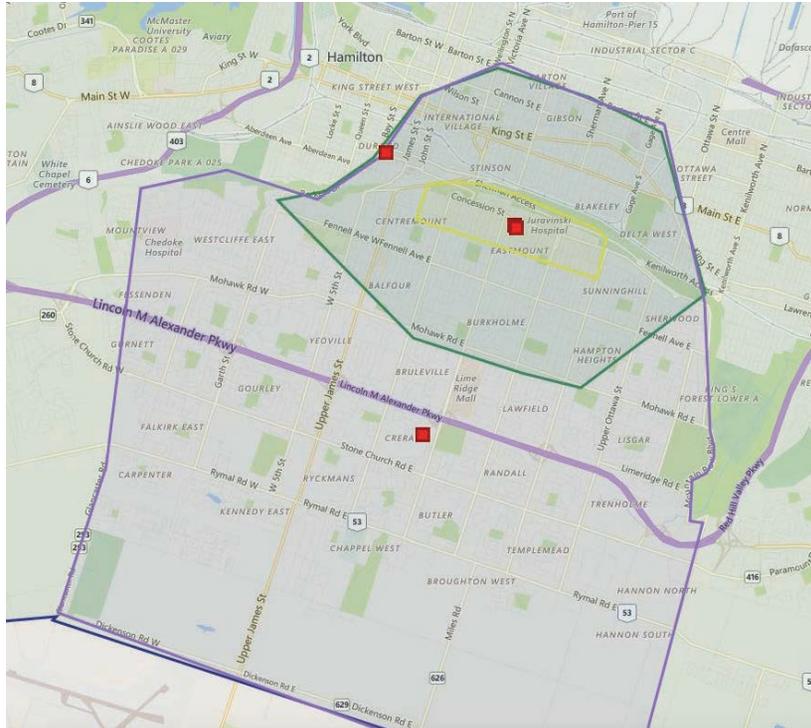
- Concession St. BIA attracts a significant number of “one-visit-only” visitors. These visitors tend to come from a wide trade area and have higher household incomes. It is very difficult to market to this group prior to their arrival. Their trip purpose ranges from medical, recreation, gift buying, dinner/entertainment, etc. As a result, guerilla marketing tactics need to be deployed including engaging storefronts.
- There is a significant group of visitors that visit on a relatively frequent basis from once every two months to twice a month. This group has desirable characteristics including medium to high average household income. This group should be encouraged to visit more frequently and/or increase their dwell time for cross-shopping purposes.
- The events attract a range of just local residents to a combination of local and City wide. Community partnerships are a key differentiator for Concession St. BIA but all events need to be assessed through the dual lens for their potential to increase sales for businesses by attracting the target market audience it wants and creating valuable community building attributes that will sustain the BIA.
- Streetfest attracts a local audience that tends to reflect the average household income of the surrounding neighbourhood. Interestingly, the 55% return rate includes visitors who have higher average household incomes and a higher probability of having a university degree.
- Sidewalk Sounds attracts a local audience but it brought out a unique audience of locals including those with higher household incomes. Similarly, the 81% return rate of visitors to Sidewalk Sounds have even higher average household incomes compared to all Sidewalk Sounds visitors.
- Both Fall Fest and Nosh Week brought out local and regional visitors with medium to high household income.



4.0 Trade Area Socio-Economic Review

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

Concession St. BIA Trade Areas



Trade areas include:

- Immediate: Mountain Brow to Thayer Ave. and Belvedere Ave. to Upper Gage Ave.
- Mountain and Downtown: Downtown neighbourhoods to Mountain Brow neighbourhoods
- Secondary: Hamilton Mountain, Lower City/Downtown, south of Alexander Lincoln Expressway
- City of Hamilton
- 60-minute drive time



Population, Households, and Daytime Workers

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
2011 Population	8,941	87,246	201,608	522,306	519,950	4,940,729
2016 Est. Population	9,248	90,650	213,925	557,426	555,841	5,428,211
Annualized Population Growth Rate	0.7%	0.8%	1.2%	1.3%	1.3%	1.9%
Households	4,548	41,939	85,346	227,189	220,822	2,059,081
Annualized Household Growth Rate	0.3%	0.4%	0.8%	0.9%	0.9%	1.4%
Daytime Worker Population	1,764	65,817	91,346	227,189	228,040	3,002,180

Source: Statistics Canada, Environics Estimates 2016

Findings

- Due to the length of Concession St. BIA, the immediate trade area encompasses a long linear frontage rather than a typical 5-minute walking distance (400 m radius). The population immediately surrounding the BIA is 9,248.
- Population growth has been positive and modest from 2011 to 2016. However, population growth has outpaced household growth indicating that more younger families are moving in to the area.
- The daytime worker population includes the hospital as well as the retailers and services along the street. There are three food service operators within the hospital that cater to the food service needs of staff, patients, and visitors. Daytime workers include workers Monday to Friday and from 9 am to 5 pm and may include office workers, hospital staff, retail, and hospitality workers.



Age Profile, Gender, and Ethnicity

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Age Profile						
0 to 9	7.9%	9.7%	10.2%	9.7%	10.3%	10.8%
10 to 19	8.2%	9.1%	11.2%	10.8%	11.1%	11.1%
20 to 29	15.9%	16.6%	15.7%	15.0%	14.8%	14.7%
30 to 39	15.2%	15.0%	13.0%	12.7%	12.9%	14.9%
40 to 49	12.7%	12.1%	12.2%	12.4%	12.7%	13.9%
50 to 59	17.2%	14.7%	14.9%	14.9%	14.9%	14.2%
60 to 69	12.1%	11.4%	11.1%	11.9%	11.6%	10.3%
70+	10.7%	11.2%	11.7%	12.5%	11.6%	10.0%
Median Age	42.3	39.6	39.9	41.4	40.7	38.9
Gender						
Male/Female	48.9/51.1	49.5/50.5	49.0/51.0	49.0/51.0	49.3/50.7	49.1/50.9
Ethnicity						
Visible Minority	11.9%	18.3%	20.8%	17.4%	16.9%	36.8%

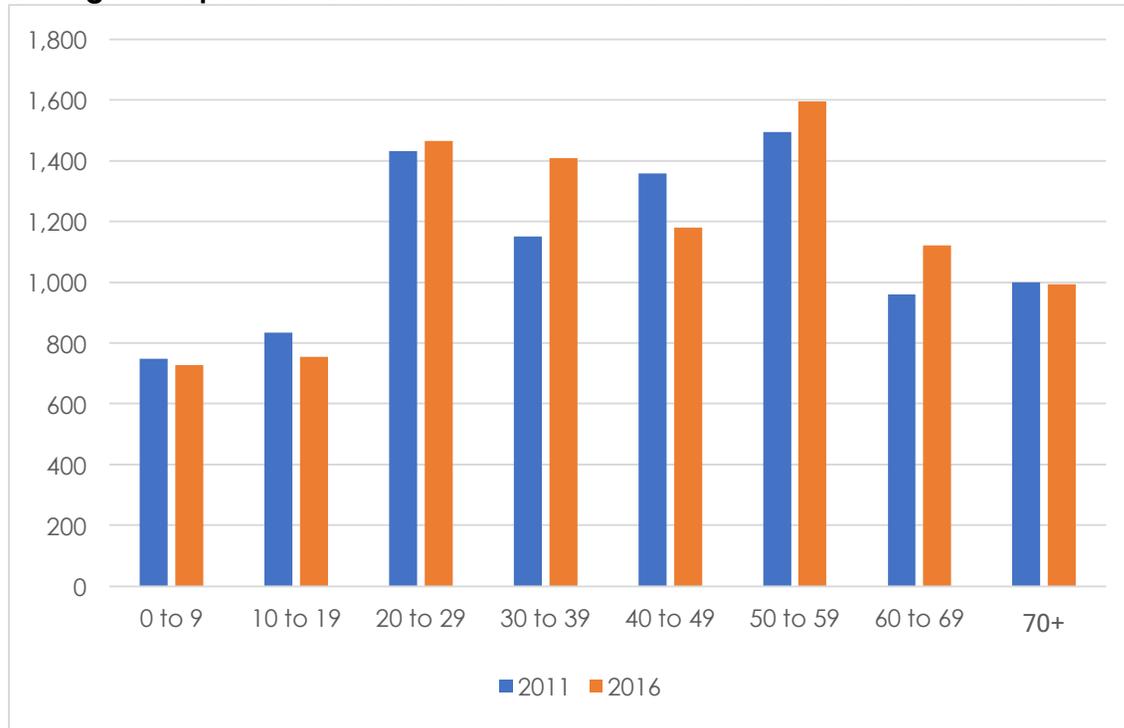
Source: Statistics Canada, Environics Estimates 2016

Findings

- There is a mixture of both young and older families with children as well as older residents living near Concession St. BIA.
- Interviewees noted that they witnessed an increase in middle aged families and fewer seniors visiting the area.
- It is interesting to note that there is a relatively low proportion of visible minorities living in the area, yet several businesses cater to Middle Eastern, South Asian, and other ethnicities that create a regional draw to the area due to the clustering of similar businesses.



Change in Population Concession St. Immediate Trade Area – 2011 to 2016



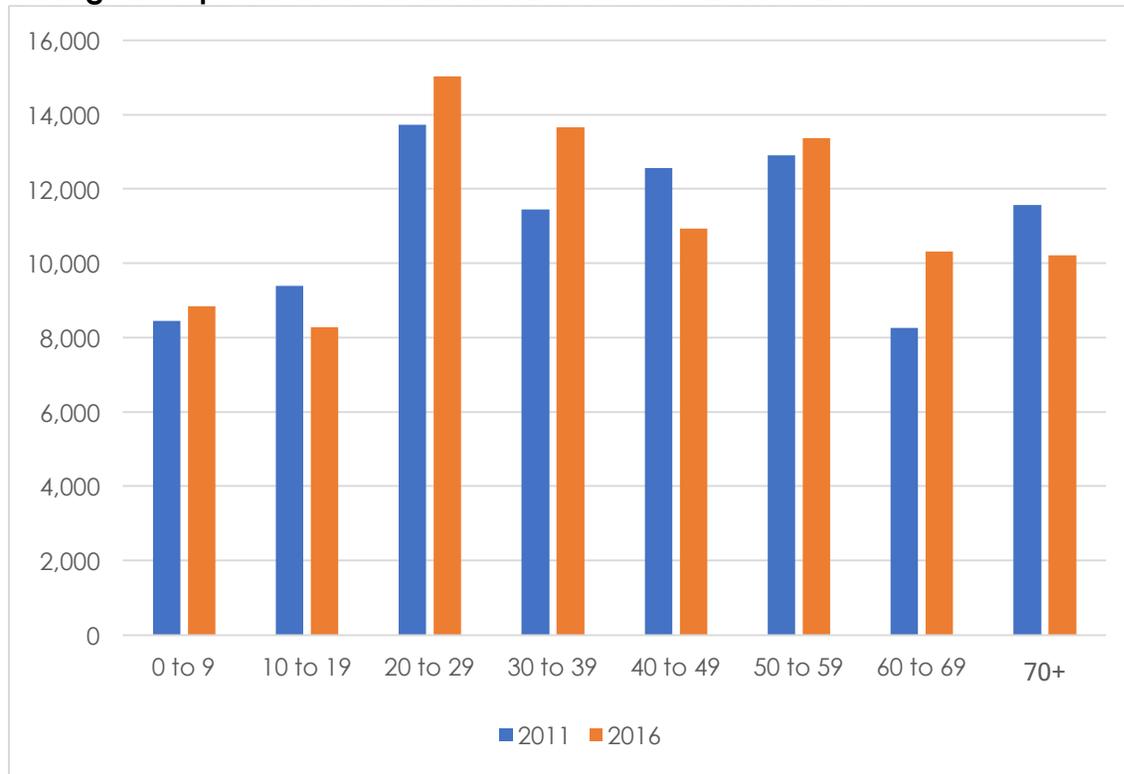
Source: Statistics Canada, Environics Estimates 2016

Findings

- There is little change from the previous study results in the number of children under 20 years of age.
- The largest growth is in the 30 to 39 years of age range. As noted there were more middle aged families in the area.
- The largest sector remains 50 to 59 year olds.



Change in Population Mountain and Downtown – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

Findings

- Young adults aged 20 to 39 are the dominant age group.
- There is a small uptick in the number of young children under 10 years of age.
- The number of 50 to 69 year olds has increased but the number of older seniors (70+) has decreased.



Household Size and Marital Status

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Household Size						
1 Person	39.7%	41.2%	29.7%	29.4%	27.7%	26.3%
2 Person	33.9%	30.5%	31.1%	32.4%	32.0%	29.7%
3 Person	14.0%	13.4%	15.9%	15.6%	16.0%	16.5%
4 Person	8.6%	9.5%	14.3%	14.3%	15.3%	16.4%
5+ Person	3.8%	5.5%	6.0%	8.3%	9.2%	11.1%
Person Per Household	2.00	2.09	2.40	2.43	2.47	2.60
Marital Status						
Single	30.3%	34.3%	31.1%	29.5%	29.3%	30.3%
Married, Common Law	46.9%	43.1%	50.3%	52.3%	53.5%	54.8%
Separated, Divorced, Widowed	22.8%	22.6%	18.6%	18.2%	17.2%	14.9%

Source: Statistics Canada, Environics Estimates 2016

Findings

- The immediate trade area includes a combination of small urban households and medium sized families.
- The older population of separated, divorced, and widowed individuals increases the proportion that are one person households.



Education, Occupation, and Home Ownership

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Education						
Less than High School	21.2%	25.7%	23.0%	20.7%	21.0%	18.1%
High School Graduate	29.1%	27.7%	26.8%	26.5%	26.2%	24.6%
College, Diploma	32.2%	28.2%	29.7%	17.7%	26.6%	23.1%
University Graduate	17.5%	18.4%	20.5%	25.1%	26.2%	34.2%
Occupation						
Management	20.1%	20.1%	21.1%	23.4%	23.2%	27.4%
Science	4.3%	4.7%	5.8%	6.5%	6.2%	8.2%
Health	8.0%	7.7%	8.0%	7.6%	7.6%	5.4%
Govt, Ed., Social Services	11.8%	11.0%	11.7%	12.2%	12.4%	11.7%
Arts, Culture, Recreation	1.9%	2.6%	2.6%	2.9%	2.8%	3.5%
Sales and Service	29.3%	26.7%	26.2%	24.6%	23.9%	23.8%
Other (Trades, Trans., Utilities, Mfg.)	22.3%	22.9%	21.2%	20.1%	21.2%	17.5%
Labour Force Participation	56.8%	54.9%	56.6%	57.6%	58.3%	64.6%
Ownership to Renters	60.2/39.8	50.7/49.3	65.0/35.0	66.6/33.4	69.9/30.4	66.8/33.2

Source: Statistics Canada, Environics Estimates 2016

Findings

- Most residents in the Immediate trade area have a college degree or diploma or higher.
- There is a slightly higher proportion that work in health-related fields but not as high given the presence of the Juravinski Hospital and Cancer Centre on Concession St.
- A high proportion of residents work in sales and service professions as well as blue collar professions such as trades, transportation, utilities, processing, and manufacturing. The impact on retail is that these professions tend to be shift work oriented which impacts retail sales opportunities related to when stores are open and coincide with work hours.
- The labour force participation rate is like other areas in Hamilton but lower than 60-minute drive time area.



Travel to Work

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Travel to Work						
Vehicle - Driver or Passenger	77.7%	68.6%	77.5%	79.7%	81.0%	71.8%
Public Transit	14.2%	19.0%	14.0%	11.9%	11.2%	19.9%
Walk	6.2%	10.1%	6.2%	6.3%	5.9%	5.7%
Bike	1.3%	1.2%	0.8%	1.1%	1.0%	1.5%
Other	0.5%	1.2%	1.1%	1.0%	1.0%	1.1%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Over three-quarters drive or is a passenger in a vehicle as a means to get to work.
- The proportion who walk to work is relatively low. This is reflective of lower number of workplaces in the area beyond the Hospital.
- Public transit usage is relatively low.



Household Income

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Household Income						
< \$20,000	9.7%	17.4%	12.2%	11.6%	11.3%	11.2%
\$20,000 to \$39,999	19.9%	22.9%	18.1%	16.9%	16.2%	14.8%
\$40,000 to \$59,999	23.4%	19.6%	18.1%	17.0%	16.3%	15.0%
\$60,000 to \$79,999	17.7%	14.3%	14.8%	14.2%	13.9%	13.3%
\$80,000 to \$99,999	11.4%	8.8%	11.2%	10.9%	9.2%	11.0%
\$100,000 to \$149,999	13.3%	11.4%	16.3%	17.0%	17.7%	17.9%
\$150,000 to \$199,999	2.9%	2.8%	5.8%	7.1%	7.7%	8.4%
\$200,000 +	1.7%	1.7%	3.3%	5.3%	5.6%	8.4%
Average Household Income	\$69,495	\$63,016	\$79,433	\$87,404	\$90,192	\$105,305
Real Annualized Growth in Household Income	0.6%	0.8%	0.9%	0.7%	0.9%	0.6%

Source: Statistics Canada, Environics Estimates 2016

Findings

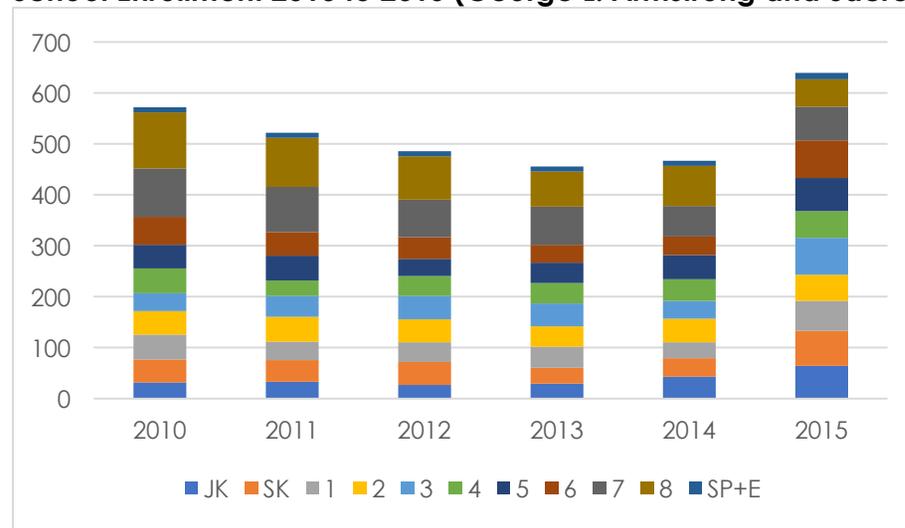
- Average household income is \$69,495 which is below other non-Downtown areas of Hamilton.
- The lower household income is compensated by the fact that household sizes are smaller than elsewhere outside of Downtown.
- There is positive growth in household incomes as measured by the real annualized growth rate (excludes inflation). Households have increased disposable income to spend.



4.1 School Enrollment

Given the time between the 2011 Census and the fact that the 2016 Census has not been released to date, a review of school enrollment data is helpful to help illustrate if there has been a change in the local demographics related to young families.

School Enrollment 2010 to 2015 (George L. Armstrong and Sacred Heart of Jesus Schools)



Source: Hamilton Wentworth School District, Hamilton Wentworth Catholic School District

Findings

- School enrollment has increased in 2015 at George L. Armstrong due to the closure of another school in the Mountain area.
- Despite overall falling enrollment from 2010 to 2013, there had been an increase in enrollment from 2010 to 2014 in Junior Kindergarten aged students.
- Enrollment at Sacred Heart of Jesus had remained relatively constant from 2010 to 2015 across all grade levels.
- The consolidation of students at George L. Armstrong school on Concession St. should positively impact retail opportunities for parents who pick their children up from school (e.g., Tim Horton's, Shoppers Drug Mart, or other quick service retailers and service providers).



4.2 Household Expenditure

Household Expenditure

	Concession St. Immediate	Mountain and Downtown	Secondary	Tertiary	Hamilton	60 Minute Drive Time
Women's Clothing and Accessories	\$1,444	\$1,351	\$1,776	\$1,956	\$2,006	\$2,288
Men's Clothing and Accessories	\$757	\$735	\$965	\$1,039	\$1,077	\$1,422
Children's Clothing and Accessories	\$36	\$51	\$59	\$58	\$62	\$113
Clothing Gifts	\$67	\$60	\$73	\$78	\$79	\$72
Furniture	\$914	\$866	\$1,089	\$1,275	\$1,331	\$1,746
Electronics	\$659	\$644	\$793	\$863	\$907	\$1,145
Leisure Goods	\$684	\$610	\$752	\$822	\$861	\$2,872
Florists	\$350	\$298	\$398	\$429	\$445	\$320
Food from Stores	\$353	\$310	\$344	\$374	\$8,514	\$8,642
Alcohol Purchased from Stores	\$6,658	\$6,248	\$7,956	\$8,248	\$1,546	\$1,604
Food from Restaurants	\$1,385	\$1,219	\$1,379	\$1,515	\$3,582	\$3,917
Alcohol from Restaurants	\$3,003	\$2,724	\$3,179	\$3,491	\$511	\$730
Health and Pharmacy Goods	\$483	\$440	\$442	\$499	\$2,364	\$2,496
Personal Care Services	\$1,832	\$1,744	\$2,218	\$2,339	\$983	\$1,189
Packaged Travel	\$751	\$652	\$857	\$966	\$797	\$850
Laundry and Dry Cleaning	\$439	\$370	\$613	\$753	\$119	\$196
Recreational Services	\$103	\$101	\$99	\$122	\$480	\$541
Movies	\$304	\$274	\$384	\$464	\$92	\$196
Live Sporting Events	\$82	\$80	\$87	\$90	\$71	\$88
Live Performing Arts	\$58	\$44	\$56	\$67	\$202	\$163

Source: Statistics Canada, Environics Estimates 2016



Findings

Households in the immediate area spend a higher proportion of their budget on:

- Pets and pet supplies
- Alcohol – served and purchased from stores
- Movies
- Laundry services
- Gifts
- Food from restaurants
- Sporting events
- Leisure goods
- Florists
- Food from stores
- Health care supplies and medicine
- Personal care services

Themes include:

- Leisure goods – toys, reading, pets, etc.
- Eating out, drinking, watching sports
- Sporting events, recreation
- Home necessities – food, specialty food, health care supplies
- Gift buying



5.0 Other Major Target Markets and Customer Visitation

Concession St. BIA businesses are impacted primarily by the Juravinski Hospital and Cancer Centre.

Statistics on staff and visitation include:

- 340 beds or 124,100 patient days
- 83,059 Clinic visits
- 40,635 Emergency room visits
- 2,380 outpatient surgeries
- 2,631 staff

Source: HHSC

In addition, other major employers nearby, such as Mohawk College, could be pursued for increased visitation.

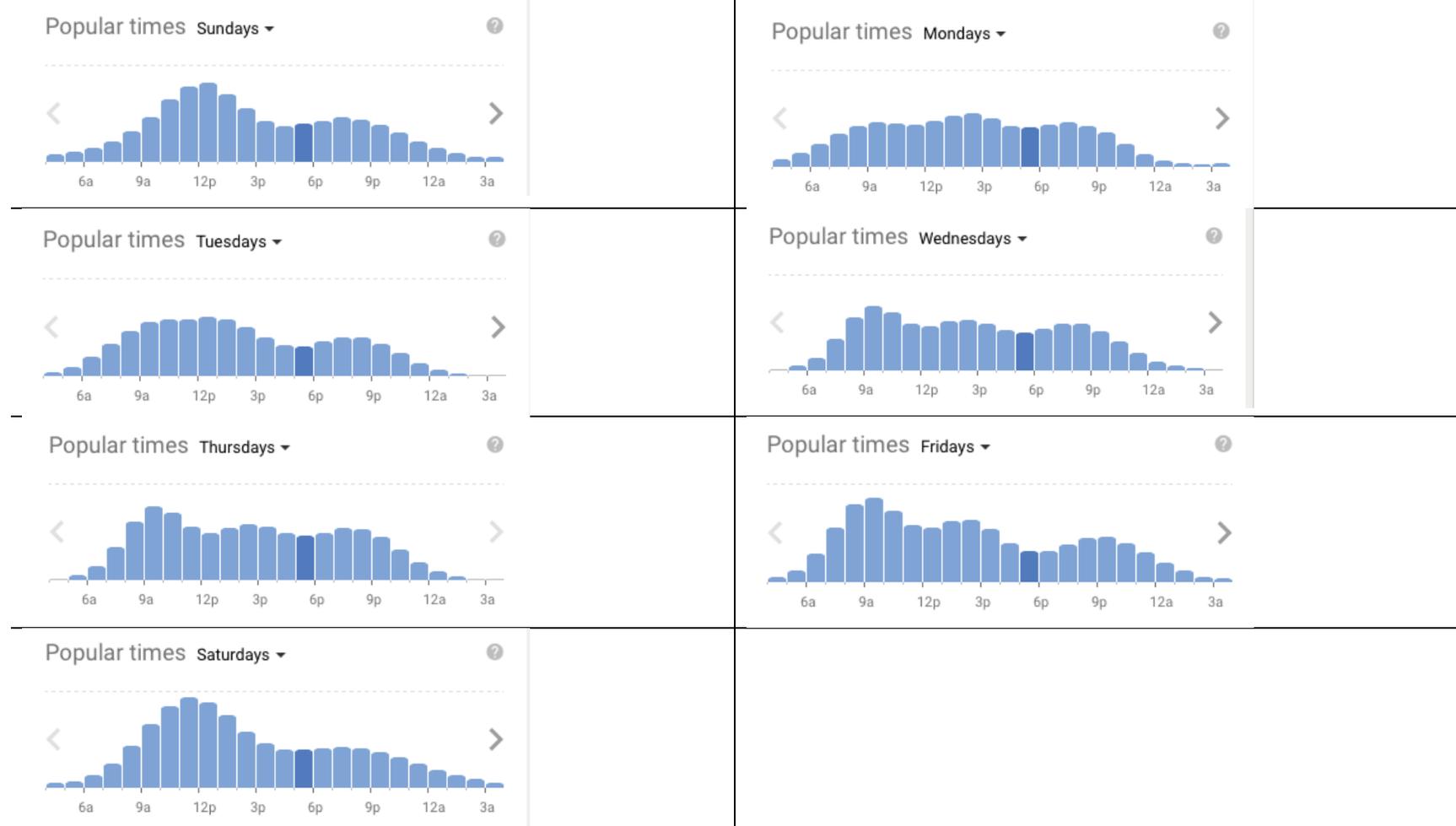


5.1 Customer Visitation Data

Customer Flow Times

The following graphs illustrate customer visitation at select Concession St. BIA businesses.

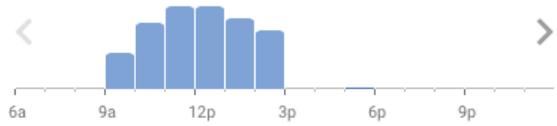
Tim Hortons



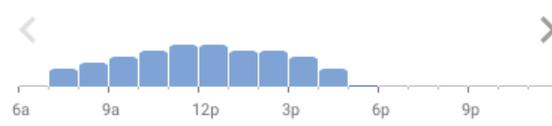


Relay

Popular times **Sundays** ▾



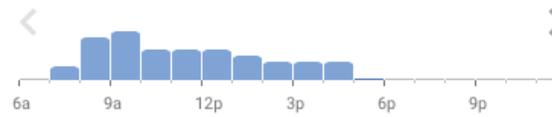
Popular times **Mondays** ▾



Popular times **Tuesdays** ▾



Popular times **Wednesdays** ▾



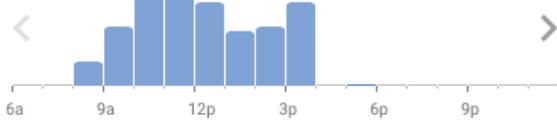
Popular times **Thursdays** ▾



Popular times **Fridays** ▾



Popular times **Saturdays** ▾





La Luna

Popular times Sundays ▾



Popular times Mondays ▾



Popular times Tuesdays ▾



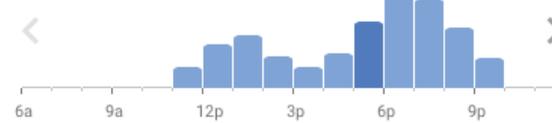
Popular times Wednesdays ▾



Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾

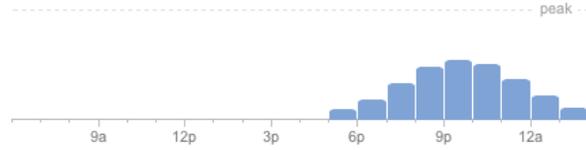




Al Omara

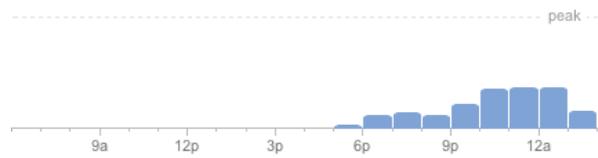
Popular times ?

Sundays



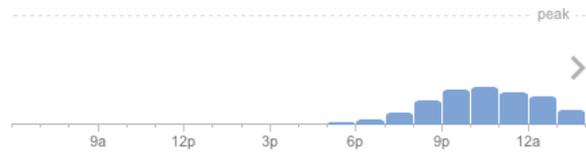
Popular times ?

Tuesdays



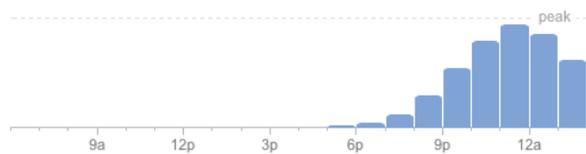
Popular times ?

Thursdays



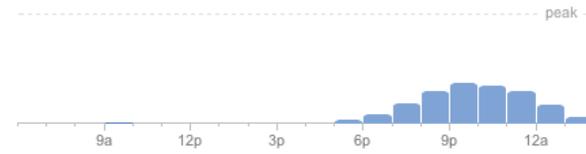
Popular times ?

Saturdays



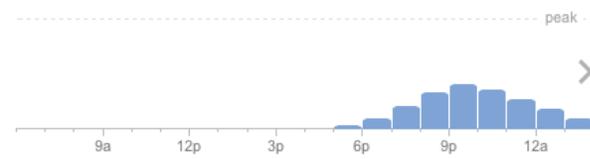
Popular times ?

Mondays



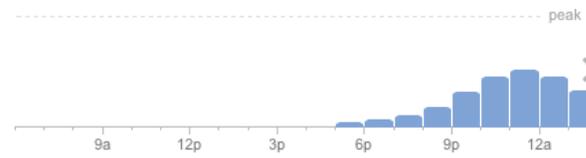
Popular times ?

Wednesdays



Popular times ?

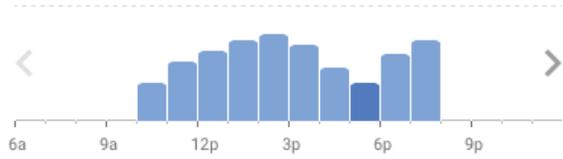
Fridays





Concession St. Library

Popular times Tuesdays ▾



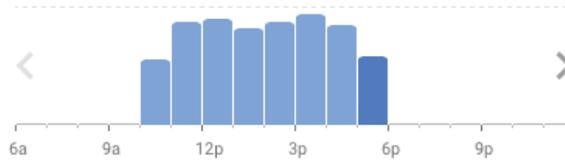
Popular times Wednesdays ▾



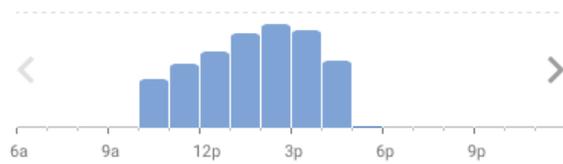
Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾



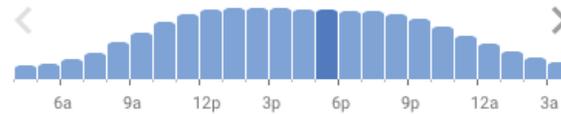


Shoppers Drug Mart

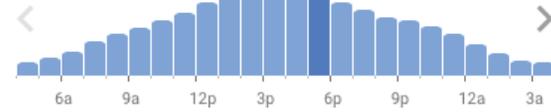
Popular times **Sundays** ▾



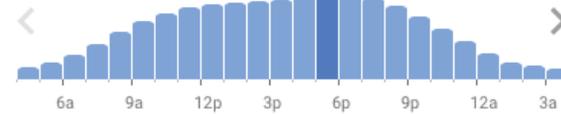
Popular times **Mondays** ▾



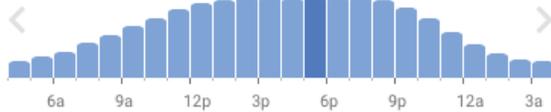
Popular times **Tuesdays** ▾



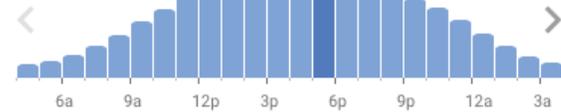
Popular times **Wednesdays** ▾



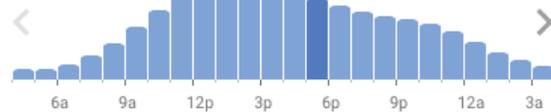
Popular times **Thursdays** ▾



Popular times **Fridays** ▾



Popular times **Saturdays** ▾





Findings

- Peak periods vary by business.
- Shoppers Drug Mart is busy from early morning until late evening, seven days a week. Working parents cause a spike in visitation weekday evenings. Shoppers Drug Mart food options now fulfill the quick meal and home meal replacement function for busy families and individuals. Shoppers Drug Market benefits from its location in close proximity to the school for parents who pick up their children from school.
- Similarly, Tim Hortons is busy throughout the day and week. During the weekday, there can be three spikes in visitation including early morning, early afternoon, and late evening. It is interesting to note that it is not as busy during lunch and dinner periods. The morning rush for cafes and coffee places occurs from 9 am to 11 am and not in the early morning. Other coffee oriented places are not busy in the early morning but after 9 am as workers settle in to work.
- Select businesses such as Al Omara are very busy during the late dinner and into the evening period.
- For most of the week, La Luna is just as busy during lunch as it is for dinner. On Friday and Saturday, dinner becomes very busy.
- Businesses need to determine when key anchors are busy and try to build synergy and piggy back off their customer draw capabilities. This includes places such as Shoppers Drug Mart and the library.
- The library can impact sales and create opportunities especially during the early evening period on Tuesdays.

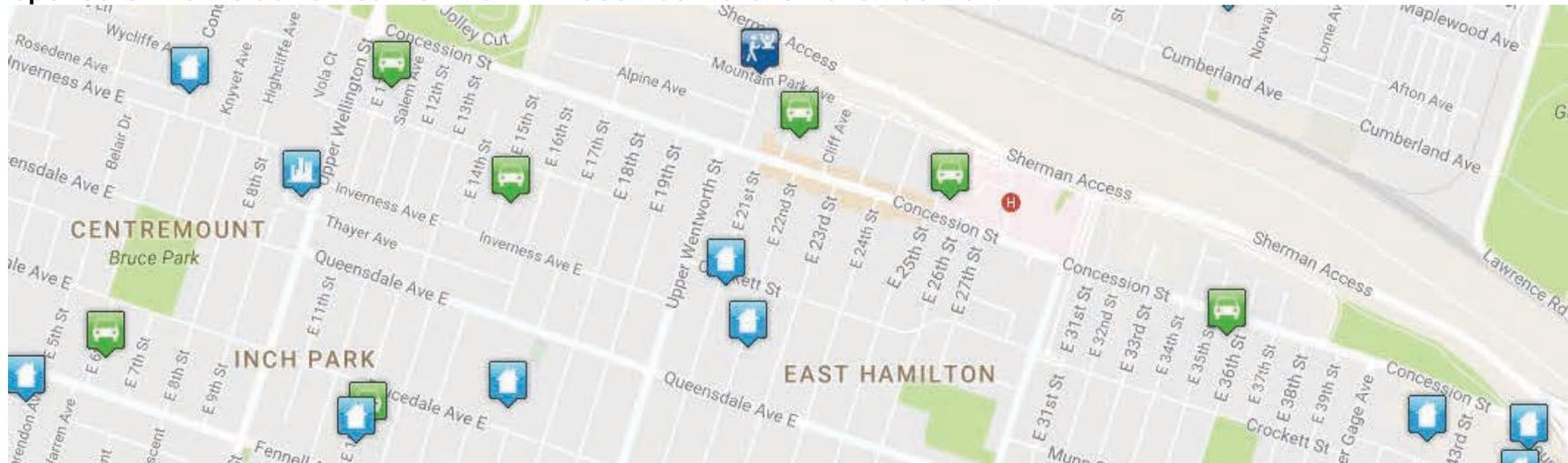


6.0 Quality of Life Statistics – Crime Statistics and Housing Prices

6.1 Crime Statistics

Within the immediate trade area of Concession St. BIA, there have been 13 reported incidents from December 2015 to November 2016. This does not appear to be higher or lower compared to other built up areas of Hamilton. The one incident of commercial robbery is a concern for BIA members.

Reported Crime Incidents West Downtown – December 2015 to November 2016



Source: Hamilton Police Services

-  Auto Theft
-  Robbery – Individual  Robbery - Commercial
-  Burglary – Commercial
-  Burglary - Residential



6.2 Housing Prices

As of November 2016, housing prices in Hamilton Mountain increased 25.4% from 2015 to 2016. Average house prices increased from \$334,586 to \$419,527. From 2012 to 2016, average prices increased at an annualized rate of 12.2%. Increases in house prices in this range are reflective of good quality of life attributes such as well functioning main streets such as Concession St. BIA where local residents can shop, do errands, socialize, and meet friends.

Hamilton Mountain Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$264,599	
2013	\$282,444	6.4%
2014	\$302,900	7.2%
2015	\$334,586	10.5%
2016	\$419,527	25.4%

Source: Realtors' Association of Hamilton and Burlington



7.0 Commercial Audit and Rent Review

An audit of the commercial businesses in Concession St. BIA was conducted in November 2016. 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).

Concession St. BIA Commercial Audit – November 2016

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	9	5.8%	11,700	4.3%
Furniture and Home Furnishings	4	2.6%	10,300	3.8%
Electronics and Appliance Stores	1	0.6%	500	0.2%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	3	1.9%	4,700	1.7%
Sporting Goods, Hobby, Book, Music	1	0.6%	3,500	1.3%
Other Retail	3	1.9%	3,800	1.4%
Total Retail	21	13.6%	34,500	12.6%
Food/Drug Retail				
Food and Beverage Stores	9	5.8%	17,600	6.4%
Health and Personal Care Stores	5	3.2%	22,600	8.2%
Total Food/Drug Retail	14	9.1%	40,200	14.7%
Food Services	23	14.9%	41,000	14.9%
Services				
Personal Services	7	4.5%	6,500	2.4%
Personal Services - Beauty	18	11.7%	19,700	7.2%
Financial Services	3	1.9%	4,300	1.6%
Medical Services	33	21.4%	39,800	14.5%
Professional Services	12	7.8%	32,300	11.8%
Recreation Services	9	5.8%	40,100	14.6%



Other Services	1	0.6%	400	0.1%
Total Services	83	53.9%	143,100	52.2%
Total Occupied	141	91.6%	258,800	94.3%
Vacant	13	8.4%	15,600	5.7%
Total	154	100.0%	274,400	100.0%

Source: 360 Collective

Findings

There is approximately 275,000 sq. ft. of commercial businesses in Concession St. BIA which is a good sized commercial area. However, it is spread out over a long area.

- There are 154 different businesses. The average size of each business is 1,782 sq. ft. which is higher than other business districts. There is a mixture of both large commercial businesses including some medical offices, Shoppers Drug Mart RBC (now closed), and some restaurants/night time venues as well as small storefronts in a traditional main street setting.
- Services is the largest category. Services account for 52% of the total square footage. This includes both medical, professional services and entertainment/recreational services. The nearby Juravinski Hospital and Cancer Centre attract a high number of medical offices to locate nearby. However, there are several entertainment and recreation activity venues including martial arts, dancing, movies, bowling, game rooms, and fitness/yoga, among others.
- There is a high number of beauty related personal services that attracts people to Concession St.
- The most prevalent commercial category is food services. Food services account for 15% of the total square footage. This includes a full range of cafes, fast food, lunch places, dinner places, and late evening gathering places. Some places cater to a Middle Eastern theme or clientele and others are focused on the hospital staff and visitors.
- The Shoppers Drug Mart is the dominant player in the food and beverage category. Food and beverage operators account for 15% of the total square footage. There are several smaller specialized grocery stores and convenience retailers that add to the vibrancy of the BIA and give it a unique character.
- Traditional retail accounts for 13% of the total square footage. There is a mixture of apparel, furniture, uniforms, gifts, leisure, etc. These stores include both local serving as well as regional appeal.
- Vacancy has decreased in the last two years to account for 6% of the total square footage.



- There are three major commercial mix themes including hospital supporting/adjacent, local neighbourhood needs, and regional (e.g., gifts, Middle Eastern, recreation). Comparing commercial audit in 2016 to 2009 illustrates the following changes,

Concession St. BIA Commercial Audit – 2016 to 2009

	2016				2009			
	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	9	5.8%	11,700	4.3%	7	4.4%	9,500	3.7%
Furniture and Home Furnishings	4	2.6%	10,300	3.8%	1	0.6%	800	0.3%
Electronics and Appliance Stores	1	0.6%	500	0.2%	4	2.5%	4,000	1.5%
Building Supply and Garden Equipment	0	0.0%	0	0.0%	0	0.0%	0	0.0%
General Merchandise	3	1.9%	4,700	1.7%	4	2.5%	7,000	2.7%
Sporting Goods, Hobby, Book, Music	1	0.6%	3,500	1.3%	7	4.4%	8,800	3.4%
Other Retail	3	1.9%	3,800	1.4%	2	1.3%	2,600	1.0%
Total Retail	21	13.6%	34,500	12.6%	25	15.7%	32,700	12.6%
Food/Drug Retail								
Food and Beverage Stores	9	5.8%	17,600	6.4%	15	9.4%	32,200	12.5%
Health and Personal Care Stores	5	3.2%	22,600	8.2%	4	2.5%	19,600	7.6%
Total Food/Drug Retail	14	9.1%	40,200	14.7%	19	11.9%	51,800	20.0%
Food Services	23	14.9%	41,000	14.9%	16	10.1%	23,900	9.2%
Services								
Personal Services	7	4.5%	6,500	2.4%	6	3.8%	7,800	3.0%
Personal Services - Beauty	18	11.7%	19,700	7.2%	16	10.1%	17,400	6.7%
Financial Services	3	1.9%	4,300	1.6%	4	2.5%	4,500	1.7%
Medical Services	33	21.4%	39,800	14.5%	29	18.2%	38,085	14.7%
Professional Services	12	7.8%	32,300	11.8%	13	8.2%	19,100	7.4%
Recreation Services	9	5.8%	40,100	14.6%	5	3.1%	29,100	11.3%



Other Services	1	0.6%	400	0.1%	5	3.1%	7,800	3.0%
Total Services	83	53.9%	143,100	52.2%	78	49.1%	123,785	47.9%
Total Occupied	141	91.6%	258,800	94.3%	138	86.8%	232,185	89.8%
Vacant	13	8.4%	15,600	5.7%	21	13.2%	26,400	10.2%
Total	154	100.0%	274,400	100.0%	159	100.0%	258,585	100.0%

Source: 360 Collective

Findings

- There are fewer businesses as the new businesses have been outpaced by expanding businesses (e.g., Shoppers Drug Mart took over the adjacent medical offices, Freedom Dance took over several small store fronts, etc.)
- Vacancy has fallen by 4.5 percentage points (almost halved) since 2009.
- Food services has increased and food and beverage stores has decreased.
- The strength in food and beverage has decreased with the closure of several smaller urban grocers and ethnic grocers.
- Retail merchandise has remained relatively constant.
- Services has increased primarily in terms of recreation and professional services and decreased in personal services. The number of beauty related services has increased modestly.

Business Mix Recommendations

- Develop detailed retail and commercial wish list and update it as each business locates on the street
- While the BIA will not actively recruit, the following are key guidelines
- Maintain retail merchandise above 13% level
- Maintain food services above 15% level
- Maintain food and drug above 15% level
- Ensure vacancy does stays below 5%
- Ensure medical services does not exceed 15%

7.1 Changes in Concession St. BIA Businesses from 2009 to 2016

The following pictures are a sample selection of businesses in Concession St. BIA in 2016 and in 2009 that illustrate investment in the local businesses.



2016: 600 Concession St. – the new restaurant appeals to regional visitors looking for halal meat. The bars on the windows have been removed to create a more welcoming facade



2009 – the bars on the window create an unfriendly pedestrian experience



2016: 636 Concession St. – Business was transformed into a café/restaurant



2009



2016: 642 Concession St. – the business was expanded for a restaurant but the space is currently vacant



2009 – the building size was smaller



2016: 593 Concession St. – updated façade and new paving, and expanded operations



2009



2016: 605 Concession St. – a new façade, increased streetscaping including planters and good window displays create an inviting presence



2009 – the business is not engaging pedestrian traffic from the street



711 Concession St. – Juravinski Hospital and Cancer Centre new entrance



2009 – the hospital expansion and renovation was under construction



2016: 759 Concession St. – While some businesses have opened to the street, this site has reverted to residential only



2009 – previous business occupant



2016: 758 Concession St. – new facade



2009 – older plaza



2016: 590 Concession St. – New façade and contemporary business offering creates an inviting atmosphere



2009



2016: 477 Concession St. – Improved landscaping



2009 – old style benches with unattractive advertising



2016: 438 Concession St. – The new signage is simple and easy to understand compared to the business in 2009



2009 – the retail signage does not stand out and is complicated to read



2016: 473 Concession St. – a new patio was added that enhances the pedestrian street experience



2009 – the front of the store is greenery



2016: 405 Concession St. – new addition and expanded operations



2009



2016: 409 Concession St. – new façade but the permeability of the windows has not improved over 2009



2009



2016: New façade and enhanced business operations, however, this lacks permeability



2009



2016: 427 Concession St. – new business and enhanced/inviting street front



2009 – property was used for residential



2016: 437 Concession St. - New façade that created a simpler look but is not engaging with the street



2009



7.2 Concession St. Area Retail Rents

The following represent active vacant units along Concession St. and nearby.

Local Area Rents

Address	Sq. Ft.	Rent/sq. ft. (gross)	Comments
674 Concession St.	591	\$16	
515 Concession St.	1,300	\$19	
730 Concession St. 2 nd Floor	1,500	\$11	Second Floor 



415	1,200	\$18.95
Concession St.		



Findings

- Rents are stable in the area varying from \$16 to \$20/sq. ft.
- The rents are low enough that entrepreneurs can develop a successful business model but they are not overly burdensome.
- The difficulty is that redeveloped space will command a higher rate to warrant the ground level commercial space.



Implications for Concession St. BIA

- There has been significant investment in businesses along Concession St. BIA.
- The mix includes a combination of medical, local, recreation, and regional appeal.
- Rents are low and the innovation and entrepreneurial spirit attracts people to develop new and interesting retail concepts.

8.0 Investment in Concession St. BIA

The following tables and charts highlight the current and past investment in Concession St. properties. The assessment includes a review of:

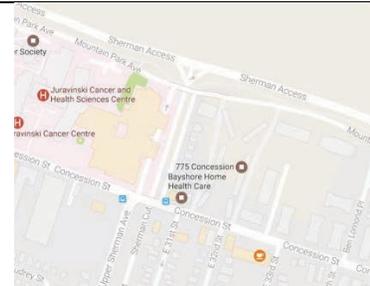
- Current 2016 development applications
- Commercial building permits
- Incentives and grants
- Assessed value

Current 2016 Development Applications

There is one active development application in Concession St. BIA.

Development Applications

Application Type	Number	Address	Purpose of Application
Site Plan	MDA-12-171	775 Concession St.	To establish a 25-stall parking area off Mountain Park Avenue and to the north of the 2 existing 4-storey apartment buildings.



Source: City of Hamilton Planning and Economic Development Department



Commercial Building Permits

Concession St. BIA Value of Commercial Building Permits

Year	Annual Total	Cumulative Total
2010	\$0	
2011	\$243,200	\$243,200
2012	\$229,100	\$472,300
2013	\$49,300	\$521,600
2014	\$402,500	\$924,100
2015	\$476,500	\$1,400,600

Source: City of Hamilton

Findings

- There has been sustained improvements in the commercial businesses in Concession St. BIA.
- From 2010 to 2015, over \$1.4 million has been invested in commercial businesses.
- Post road construction, there appears to be renewed optimism to invest in businesses.
- Investment in the Juravinski Hospital and Cancer Centre was \$15.9 million as per building permit data.

Grants and Incentives

Concession St. BIA Development Grants, Loans, and Incentives – Commercial

Year	Actual Cost including CPIG
2010	\$30,415.08
2011	\$35,329.45
2012	\$0
2013	\$55,569.44
2014	\$49,262.14
2015	\$84,817.82
Total	\$255,393.93

Source: City of Hamilton



Findings

- There has been good use of grants and incentives from the façade improvement program.
- Businesses took advantage of the streetscape construction to improve their buildings.

Assessed Value

Concession St. BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2010	\$26,046,243	
2011	\$27,680,243	6.3%
2012	\$29,266,082	5.7%
2013	\$29,889,578	2.1%
2014	\$30,961,869	3.6%
2015	\$31,884,385	3.0%

Source: MPAC, City of Hamilton

Findings

- From 2010 to 2015, the assessed value of the commercial areas within the Concession St. BIA has increased at an annualized rate of 4.0%.

Implications for Concession St. BIA

- The continued investment by businesses and property owners is felt on the street.
- The investment is required to keep businesses competitive.
- The recent completion of the streetscape program will be followed by continued property investment.



Concession St. BIA Budget

- The total budget for the BIA has remained relatively constant over the past six years.
- The amount of parking revenue sharing declined in 2015 due to the construction as well as other factors such as less money to share and more BIAs participating.

Concession St. BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2010	\$976.19	\$5,807.15		\$6,783.34	\$78,750.00	\$78,750.00
2011	\$535.81	\$5,852.12	\$17,908.57	\$24,296.50	\$78,750.00	\$78,750.00
2012	\$0.00	\$5,716.56	\$18,166.74	\$23,883.30	\$78,750.00	\$78,750.00
2013	\$961.35	\$5,638.48	\$16,817.17	\$23,417.00	\$78,750.00	\$78,750.00
2014	\$1,000.00	\$5,638.48	\$17,216.24	\$23,854.72	\$80,750.00	\$80,750.00
2015	\$1,316.60	\$6,160.54	\$13,468.65	\$20,945.79	\$80,750.00	\$80,750.00

Source: City of Hamilton



9.0 Key Person Interviews

Key person interviews with businesses were conducted during November 2016 and January 2017. The opinions expressed in this section do not necessarily reflect the opinions of 360 Collective, the City of Hamilton, or the Concession St. BIA. The following represents comments and opinions related to strengths, weaknesses, opportunities, and threats.

9.1 Concession Street Key Person Interviews - SWOT

STRENGTHS

Business Sales

- Sales are good
- Sales are increasing

Innovative Business Ideas

- Do well with home meal replacement as a solution for local residents' busy lives
- Worked on advertising business and it has had good impact on sales
- Develop pop up shops – take sales opportunities to where the customers are
- Destination businesses are attracting visitors – food, home, bakery

Customers

- 70% of customers come from regional area – they are not local
- Draw regionally to the area
- Do well during holiday and gift giving periods
- There is a steady volume of customers
- Draw people who are 10 to 70 years of age
- Have noticed new customers coming in – more middle aged 35 to 45 years of age (older customers are not coming in as much and many are passing away so need to customers to replace older ones)
- Create areas for customers to socialize and linger
- Noticed a positive change in household income of the local residents
- Walk by traffic has increased
- Very reliant on the hospital traffic
- Traffic is 50/50 split between medical related (staff, patients, and visitors) and local/regional customers



Business Synergy

- There is spillover from my business to others
- Refer my customers to other businesses on the street
- Businesses are good at referring customers to others

Location

- Concession St. is a good location – it is central to Hamilton

Events

- Well run events
- Events do help bring additional sales to my business
- It has been a long time since there were well developed events in the BIA and now there are well run events again
- Events are drawing customers to the area

Community Minded

- Work on events and programs that benefit the local community
- Very community minded – businesses help one another and cross promote one another
- Businesses are committed to working with charities – operators have ideas for new charity themed programs
- There are many people on the street who are committed to Concession St. and want it to do well

Business Investment

- The façade improvements have caused passing by traffic to notice my business and sales are up
- Committed to making businesses and properties competitive and investing in them

Competitive Rents

- Landlord helps by keeping rents lower than elsewhere and allows my business to do ok profit margin. Business would lose money based on existing sales but having to pay higher rent
- Rents are good
- Rents are low enough to allow for new innovative ideas without being committed to a significant investment in five-year rent deals



Beautification Investment

- Plans to add lanterns to the poles to beautify the area
- People comment to retailers that the area is better looking and more pleasant to walk along
- Think the beautification has made visitors happier people, has improved their overall mood
- Beautification and street is drawing people back to the area

Public Realm That Supports Business Sales

- Outdoor merchandising and increasing permeability into the store is important
- Need to be creative on the street and engage with passer by traffic to draw them into the store
- Outdoor marketing needs to keep changing and be fresh otherwise it becomes stale
- Your business and storefront must interact with the customers – experiential
- There is more life on the street than before

Feel and Atmosphere

- Concession St. has a downtown feel without the hassle of being Downtown
- Concession St. has a livelier family atmosphere
- Cleaner
- Cosmetically, looks a lot better
- Perception of Hamilton and Concession St. is changing for the better
- Things are on the upswing
- More social environment where people say hi to one another
- Concession St. is the next big thing

Marketing

- Twitter is used successfully to reach customers – create a unique following
- Executive Director and local residents are great at creating an active Twitter following

Time of Day Busiest

- 5 pm to 6 pm
- Weekdays are busiest



Safety and Security

- Area is much safer today than five years ago – crime is down significantly

BIA

- Executive Director works hard and is focused on events, events, events
- BIA was very helpful and is active in helping our business
- BIA is good at helping businesses and can help us with City grants and program
- BIA knows who all the contacts are and can assist businesses get what they want done
- BIA has a good presence and have been helpful with my businesses

Post Construction Boon

- Sales have rebounded since construction – survived
- City has very good communication with the BIA members during constructions, City staff bent over backwards to help make the construction as smooth as possible
- The difficulties of the construction are becoming more and more faded memories as the retail sales have bounced back



WEAKNESSES

Disposable Income

- As rents have increased dramatically in the local area, people have less disposable income to spend on shopping on Concession St.

Competition

- Too many hair salons

Pedestrian Traffic

- Lack of pedestrian traffic in the area – no walk-ins
- Lack of traffic overall

Safety

- Vandalism and graffiti are issues

Cost of Operating a Business

- The costs of business are increasing
- Staff costs are the most significant and need staff to stay open later

Business Mix

- There are not enough retail merchandise stores to create any sort of critical mass that would attract visitors to shop

Rent Affordability

- Storefront rents are increasing which will squeeze retailers and businesses

Pedestrian Safety – Speed of Traffic

- Young children and seniors have difficulty crossing the street
- Street camera was stolen on several occasions
- Digital speed signs are not a strong enough message, need police officers stopping traffic with strong fines as a deterrent



Parking Enforcement

- Parking enforcement is too aggressive – many people want to do a quick pick-up but end up with a parking ticket
- Should stop charging for parking in the evening
- Parking during the evening should be free

Competing Events

- There can be competing events going on in Concession St.
- Was difficult to get Street Fest approved and funded for 2016
- Feel duped by the BIA – wanted to promote Friday evening events and take away long-standing event (Street Fest)
- For the events, the vendors benefitted but the businesses did not see the uptick in sales

Marketing

- BIA should use Twitter less as a marketing tool as the visitors to Concession St. are not tech savvy (local resident visitors)
- Advertise should not focus on only one business but BIA should support umbrella marketing campaigns and promote business groupings (apparel, food, ethnic, medical, value conscious, recreation such as dance, martial arts, game rooms, film, etc.) – we are the best at these things....

Parking

- Only issue with parking is that business owners will take on-street parking when they know they shouldn't

BIA

- Do not see value for the increase in BIA budget and the increase in administration costs for what we are getting as members
- Have participated in the past but was not effective – needed to get away from BIA issues

City

- City departments are too regulation oriented and not helpful even when the City makes a mistake
- City's One Stop Shop is not working the way it should
- Unsure why some businesses have not opened yet – such as Neighbourhood Grill, is it City regulations?
- City seems overly regulatory and unsure of some of the rules
- Need better utilization of the City grants programs



Business Closure

- Bank is consolidating locations in the area and closing Concession St. Branch
- Dollar store came and went

Street Redevelopment

- Sales were down less than 50% during construction
- Sales were down more than 50% during construction



OPPORTUNITIES

Business Ideas

- Do well with home meal replacement
- More retail and retail related to women's clothing
- Need critical mass of unique retailers that complement each other but each one is different and competitive
- Want more delicious restaurants, fast casual, places to hang out
- Increase the number of things to do during the evening
- Create ideas for synergy and cross promoting and marketing businesses (e.g., movie and pizza)
- Want more retail merchandise stores
- Have to be creative and add different business ideas and services to make stores profitable. Cannot survive just on walk-in traffic
- More competition is better, creates a greater competitive environment
- More evening restaurant options
- Need more night time activity in the area
- Need better quality businesses – perhaps some type of chain store that would draw people to the area
- Want to see a mix of chains and independents
- Develop incentives to help small businesses

Marketing

- Need more “marketing” that promotes Concession St. as the place to be
- Need to market and promote what Concession St. is the best at
- Marketing should work towards - “say it, see it, believe it”
- There needs to be more public relations not just BIA but all business owners need to become Concession St. advocates and ambassadors everywhere they go
- Want to work with the City and the BIA to figure out a way to market my business to walk by traffic – to understand the rules and regulations on what is permitted

Public Realm

- The flowers, lights, decorations have been great – but need more and they need to be on a bigger scale to make a more significant visual for the street



Hospital

- Untapped opportunity to take products and services to the hospital rather than relying on them to leave the hospital and come to your store

Park Space

- Mountain Brow is underutilized
- Sam Lawrence Park is not being used to its full advantage (does allow food trucks to locate there)

Public Realm

- The businesses need to create an animated and active public realm presence for their businesses
- Stores are creating added “texture” along the street front that creates interesting store spaces, invites people to linger and increase dwell time, and develop a more exciting and animated street

Public Safety

- Need mirrors at vehicular egress points so that drivers can see the pedestrian traffic nearby

THREATS

- Other districts including Downtown and shopping plazas



10.0 Strengths Weakness, Opportunities, and Threats

The following is the SWOT assessment for research related to all aspects of Concession St. BIA.

STRENGTHS

- Improving demographics
- Regional draw that extends into southwestern Ontario
- Core repeat visitor that comes once every two months to twice a month
- Hospital and medical spillover and supports local businesses
- Recreation oriented economy – dance, martial arts, theatre, movies, game rooms, bowling, etc.
- Growing night time economy
- Investment in events is paying off in terms of driving a higher income and more sophisticated visitor to Concession St. BIA
- Community minded businesses that work collaboratively with the community – strong sense of community that is authentic
- New businesses opening to take advantage of reasonable rents and can experiment with entrepreneurial ideas
- Good BIA leadership

WEAKNESSES

- Lower household income and older families that live nearby
- Lower disposable income as local residential rents increase
- Long commercial street that has gaps in the continuous retail frontage
- Lack of retail on the north side of Concession St.
- Lack of retail merchandise in general
- Increasing rents
- Low pedestrian traffic volumes



OPPORTUNITIES

- Continue to grow night time economy
- Encourage more outdoor merchandising, opening businesses to the street, encouraging patios, etc.
- Encourage those visitors who come once every two months to twice a month to visit more often and/or increase their dwell time
- Focus on recreation as a key driver (dance, theatre, movies, bowling, martial arts, games room, etc.)
- Be the entrepreneurial innovation hub for Hamilton
- Continue to market Concession St. as “the” place to be
- New development and infill development focused on increased residential density

THREATS

- Downtown, other plazas and shopping areas
- Hospital



10.1 Comparison to Previous Commercial Market Assessment

- Compared to the study conducted in 2009/2010 the BIA is in a stronger position both organizationally and in its programming. Vacancy has reduced over the years from 14% (2002) to 10% (2009) to 6% (2016). The use of grants and incentives was strong and continues to be. There has been a noticeable property owner investment in the properties that is reflective of the optimism and future potential for the commercial district.
- The recommendation to review the identity of the BIA and the tag line “Where Neighbours Meet” has been undertaken and it continues to evolve.
- Organizationally, there is better committee work that is achieving results, increased communication, increased partnerships especially with the hospital, and event programming.
- A review of the specific recommendations from the 2009/2010 report includes the following:

2009/2010 Recommendations	Status
Review committee work by each one setting strategic goals, tactics to accomplish the goals and a reporting structure to the main board meetings	Yes advancements have been made, BIA may consider task forces as well as an alternative to board committees
Continue excellent communications work and welcoming program	Yes and ongoing
Work towards improved partnership with the hospital	Yes, improved
Increase redevelopment opportunities through mixed-use developments and possible parking structures	Redevelopment is about to take off in the BIA and BIA should be prepared to understand basic facts of redevelopment
Develop design guidelines, physical improvement programs, parking, and safety	Road redevelopment has made significant change in business opportunities on the street, progress on other factors but ongoing
Develop ways to continue façade improvement programs	Yes, good usage
Use marketing messages to showcase the family of businesses on the street, their unique personalities, and the commitment to personal service	Yes and ongoing
Continue to work with the City on programs that are beneficial to the BIA	Yes and ongoing



11.0 Concession St. BIA Vision

Target Markets

Moving forward, Concession St. BIA should focus on the following key target markets:

- **Local residents:** within a five to ten-minute walk there is approximately 10,000 residents. Local residents are loyal to their nearby main street (Concession St. BIA). They are looking for local shopping including errands, food and beverage items, home meal replacement, pharmacy and personal care items, general merchandise, beauty and hair services, recreation, arts, culture, and entertainment services, local medical services (e.g., dentist), cafes, and local fast casual restaurants.
- **Regional residents:** Regional visitors come for a variety of reasons including gift buying, unique items such as South Asian and Middle Eastern food items, other specialty food items, specialized expert type goods and services, recreation, arts, culture, and entertainment services, cafes and restaurants including night time food service venues.
- **Medical visitors:** The presence of the Juravinski Hospital and Cancer Centre draws visitation. There are businesses that have co-located in adjacent places on Concession St. including highly specialized medical care.
- **Day-time workers:** daytime workers in Concession St. BIA are primarily associated with the medical fields. Physicians, medical staff, nurses, support staff, technicians, medical volunteers and health related students, among other professions are located nearby. These staff and volunteers drive sales for food services as well as home related errands that people like to complete while at work rather than doing them on their day off (e.g., gifts for family party, home meal replacement options, or dentist appointment as part of the work day, etc.) One note is that most workers are shift work and as a result do not follow the exact same eating and shopping schedule as a Downtown office worker.
- **Early evening and weekend:** There is wide range of recreation, arts, culture, and entertainment related services throughout the BIA that drive visitation. This includes parents who drop their children off at various recreation oriented centres such as martial arts. It includes cinema, dance, bowling, physical fitness, library, sports, etc. Businesses may be able to take advantage of the people flow in the Concession St. BIA area that may include food services, shopping, or other goods and services based errands.



First Principles BIA Work

The Concession St. BIA has worked to assess and improve their identity and vision. While the report suggests improvements and action for the BIA to be taken, it is recommended that a full vision session be undertaken by the BIA to address the following components.

Based on the workshop session, the following identity and vision components were discussed:

- Identity – create a more sophisticated offering – look and feel
- Continue to delve into the issue about what makes “Where Neighbours Meet” the key differentiator
- Must include “call to action” that re-enforces commercial area, what is the emotional reason people are connected to the street and why do they want to visit or return.

Identity

- Business mix – collection of experts
- Geography, location, Mountain Bluff, edge street
- Ephemeral nature to Concession St. that is changing and evolving
- Experience, atmosphere, textured street environment that encourages lingering and increased dwell time



12.0 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. 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 including parking, streetscaping, beautification, etc.
- Marketing including both customer focused marketing and investor attraction marketing components



12.1 Organization and Governance

The main issues for organization development are:

- Member engagement including apathy
- Member communication
- Municipal engagement
- Local stakeholder engagement

Overall, there are no major issues related to the organization. The BIA will continue to devote time and resources to improving engagement at all levels through communication and involvement.

Organization and Governance Recommendations

SHORT TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Develop social media policy	<ul style="list-style-type: none"> • Determine when and how you should be replying to social media that affects the BIA and members 	<ul style="list-style-type: none"> • BIA staff and executive committee 	Yes	<ul style="list-style-type: none"> • By next AGM
Develop a BIA purchasing policy	<ul style="list-style-type: none"> • Rules and procedures for accountability 	<ul style="list-style-type: none"> • BIA staff 	Yes	<ul style="list-style-type: none"> • By next AGM
Develop a code of conduct for BIA and member interaction	<ul style="list-style-type: none"> • Send out to all members and review at Annual General Meeting 	<ul style="list-style-type: none"> • BIA staff and executive committee 	Yes	<ul style="list-style-type: none"> • By next AGM



MEDIUM TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Focus AGM and other meetings on positive learnings – bring in speakers on topics of relevance to BIA members including marketing techniques, grants and incentives, etc.	<ul style="list-style-type: none"> Set AGM agenda that focuses on learning, education, and positive change happening 	<ul style="list-style-type: none"> BIA staff and executive committee 	Yes	<ul style="list-style-type: none"> By next AGM
Recruit members to sit on committees and task forces Think of succession planning for BIA board members	<ul style="list-style-type: none"> Create short term mandate letters for task force programs that members can agree to participate on for a short duration 	<ul style="list-style-type: none"> BIA staff and executive or governance committee 	Yes	<ul style="list-style-type: none"> 6 months and ongoing for succession planning
Continue strong relationship with City staff and City Councillors	<ul style="list-style-type: none"> How to leverage resources, staff time, connections, etc. to create greater impact on Concession St. BIA Report back to members on how BIA was able to leverage City resources to attain greater impact 	<ul style="list-style-type: none"> BIA staff and City staff and Councillors 	Yes	<ul style="list-style-type: none"> Ongoing



12.2 Economic Development

One of the goals associated with Concession Street BIA's economic development goals includes increased night time economy with the aim of continuing to attract busy professionals, younger attitude persons/groups (hipper) with a more urban, experience.

Allowing groups of people to stroll along Concession St. and feel part of the urban main street improves commercial sales opportunities but also increases the surrounding area's quality of life metrics. The local area becomes a desirable place to live when Concession St. continues to provide community building opportunities.

To complement the night time economy requires attention to:

- Street lighting – safe but not intrusive, creates a mood/atmosphere that enhances people (i.e., lights that bathe them in soft uplighting), makes the commercial businesses come to life even if they are closed
- Enhancing the public realm with art, lighting, temporary art displays (ephemeral), patios, etc.

Moving forward, Concession St. BIA realizes that while traditional retail merchandise stores are important to creating a diverse, urban retail experience, they are not necessarily the defining element of success. A starting list from the workshop includes the following wish list retailers. However, the BIA should continue to poll members on competitive and complementary businesses that fulfill their economic development goals and objectives.

- Gastro pub or brew pub
- Higher end dining
- Gift related stores including those for hospital patients
- Fitness, work out centres, smaller intense workout gyms
- Food – specialty food – many exist in BIA but ensure there is meat, seafood, fruits and vegetables, bakeries, ethnic food, cheese, confectionary, desserts (cakes, cupcakes, etc.), brew pub/gastro pub, home meal replacement, etc.
- Health and wellness (beyond medical centres) – optical, skin care, organics, nutrition, etc.
- Clothing and accessories

In addition, an ongoing understanding of omni-channel retail and the role that bricks and mortar retail can play is essential for Concession St. BIA and all main streets. Some examples of the impact is included in Section 15.0 Trends.



Recommendations – Economic Development

SHORT TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Develop detailed retail and commercial wish list and update it as each business locates on the street	<ul style="list-style-type: none"> • While the BIA will not actively recruit, the following are key guidelines • Maintain retail merchandise above 13% level • Maintain food services above 15% level • Maintain food and drug above 15% level • Ensure vacancy does stays below 5% • Ensure medical services does not exceed 15% 	<ul style="list-style-type: none"> • BIA through online poll • BIA will not take an active recruitment role but will allow the market conditions to sort out the retail mix with an aim of keeping medical services below a threshold 	<p>Yes</p> <p>Need to provide rationale for each business and why it will be a good addition to the BIA</p>	<ul style="list-style-type: none"> • 6 months but constantly updated



MEDIUM TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Continue to market vacant real estate	<ul style="list-style-type: none"> • Monitor vacancy and separate those vacant units that are immediately leasable and those that require landlord investment to make them leasable • Monitor vacancy rebate program for impact on members and businesses 	<ul style="list-style-type: none"> • BIA and property owners, brokers 	<ul style="list-style-type: none"> • Yes – may require City building inspectors working with BIA and property owners to identify key property standard issues that need to be resolved to make properties leasable 	<ul style="list-style-type: none"> • 1 year
Educate BIA committee on basic development programs and terms including a hypothetical redevelopment site on Concession St. (note that this is a long-term goal and we do not anticipate that the BIA would fully engage in all aspects of redevelopment but they should become literate on terms and basic principles)	<ul style="list-style-type: none"> • As redevelopment pressure grows, invest time towards understanding key factors used the development industry including the potential for a case study property on the street 	<ul style="list-style-type: none"> • BIA working with economic advisor and architect 	<ul style="list-style-type: none"> • Yes – BIA needs to become knowledgeable about the inputs affecting developments and different variables such as rents, height, residential and commercial rents, etc. have on the viability of a project 	<ul style="list-style-type: none"> • 2 year



Support redevelopment of properties for higher density including retail on the ground level and office commercial including medical on the upper levels	<ul style="list-style-type: none">• Number of new units built, net new office sq. ft., net new retail sq. ft.	<ul style="list-style-type: none">• BIA and City Planning	<ul style="list-style-type: none">• Yes, but BIA will be made aware of developments when they are public	<ul style="list-style-type: none">• Ongoing
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13.3 Physical Improvements

Most of these elements would be spearheaded by the City of Hamilton Public Works in coordination and consultation with the Concession St. BIA. However, as noted, this report does not bind the City or the BIA to these recommendations. Many of these suggestions are aspirational.

Public Realm

Having completed the road and street, the BIA can focus on activating the streetfront. This includes:

- Creating pause areas including parkettes (see City's report on patios and parkettes). Given the long street, these pause areas should be spaced along the street at regular intervals (maximum every 400 m)
- Encouraging restaurants and cafes to provide outdoor seating and use of patios on parking spots
- Encouraging businesses to remove bars from windows, to remove posters from windows to increase permeability into the store
- Encouraging tasteful use of outdoor merchandising areas that encourages engagement with the passerby traffic
- Creating increased texture along the street using planters, lighting, art, murals, seating areas, benches, tables to play games (chess, checkers, ping pong, etc.), fountains, in both the public and private realm
- Stage entertainment at ideal people movement times such as 1 pm during lunch period, 4 pm when hospital staff change shifts, 6 pm during the evening commute, etc.
- Encouraging stores to light up their display windows so that in the early evening they provide an increased sense of activity even if they are closed (note that through the façade improvement grant program, lighting for window display areas should be part of the application)
- Lighting could include:
 1. Elements of art, entertainment – e.g., lighting the building
 2. Enhancing the “see and be seen” aspects of the street – e.g., fairy, lights, soft up lighting,
 3. Enhancing window displays that showcase the products for sale
- Should not be overly orchestrated but more organic within set guidelines
- Other elements such as using Sam Lawrence Park, etc. should be coordinated to create pedestrian flow throughout the area



Encourage smaller urban park spaces for people gathering including Privately Owned Parks – POP)



A patio space is carved out of the development to create a combination of public realm (Privately Owned Park – POP) and private patio space



Restaurants with accordion type doors



Garage type doors open to the street



Can be more sculptural yet also encourage community building and conversation



Can make use of shipping containers for unique people gathering places



Large colourful art work



Art work that also works as wayfinding, gateway signage, and sense of place should be considered



The Wynwood District in Miami is famous for its murals



The murals are transferred to pedestrian Crossings



Physical Improvements – Recommendations

SHORT TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Review parking and loading with City staff	<ul style="list-style-type: none"> Annually gather input from businesses ahead of a walk-through with City Parking to review number of on-street parking, meter issues, loading area locations, etc. 	<ul style="list-style-type: none"> BIA staff and parking committee along with City staff 	Yes	<ul style="list-style-type: none"> Annually

LONG TERM				
Specific	Measurable	Accountable	Realistic	Timeframe
Review all benches, plantings, art work, lighting with aim of creating a textured commercial street and allows people to stop and gather, include restaurant patios and parkettes	<ul style="list-style-type: none"> Map assets along the street showing pause areas, clusters of activity, etc. Map assets against target market aims 	<ul style="list-style-type: none"> BIA staff and beautification committee along with City public works 	Yes	<ul style="list-style-type: none"> Map assets within 9 months, ongoing monitoring



13.4 Marketing SWOT

This SWOT is based on reviewing your current marketing activities including your brand identity, website, social media channels, advertising vehicles, events, promotions etc.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Modern feeling brand• Very diverse mix of members offering breadth & depth• Decent BIA budget (\$80K)	<ul style="list-style-type: none">• Two potential conflicting taglines, “Where Neighbours Meet.” and “The uptown shopping destination.”• Weak profile of local businesses• Unclear who the website is for target audience-wise• Limited use of all available social media channels• The links from the website to LinkedIn, Twitter and Facebook are not connected to anything• Instagram is a miss based on your location• Gallery of photos should be linked to people and places• Old logo still appears on the website
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Getting your “brand house” to best communicate your unique selling proposition	<ul style="list-style-type: none">• Other neighbouring Hamilton BIA's that are well defined and more sophisticated in their brand identity and marketing initiatives



13.5 Marketing – Website and Social Media Review

- **Domain:** www.concessionstreet.ca
- Domain was registered Monday, February 20, 2012
- Domain expires Monday, February 20, 2017

Evaluation

The website was reviewed under the following criteria headings:

- Purpose
- Content
- Design
- Authorship

In addition, a review of AODA compliance, Facebook and Twitter was conducted.

Note checked boxes indicates that the following factor was achieved. If warranted, additional commentary on a specific factor is provided or a rating of 1 to 5 is provided.



Purpose

- ☑ The purpose of the website is clear and succinct.
- ☑ The content of the site is its primary focus and not overshadowed by advertising.
- ☑ The site avoids social bias.
- ☑ The site enriches and expands users' imaginations.
- ☑ The information on the site is relevant.

Content

- ☑ The content is easy to read and is understandable.
- ☑ There is an outline of topics provided allowing users to find topics and move among them easily.

①

②

③

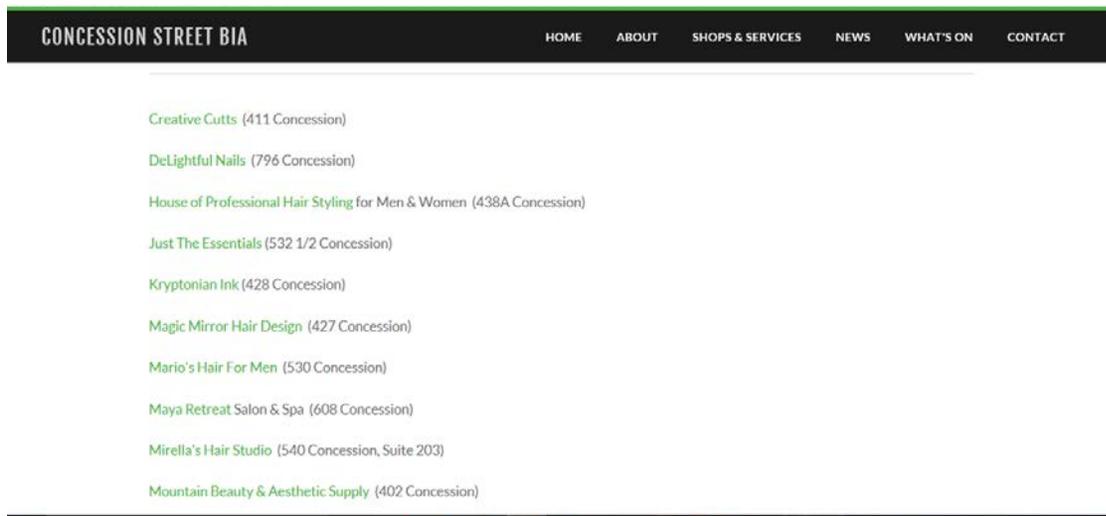
④

⑤

- ☑ The spelling and grammar are always correct.
- ☑ The information is current and accurate - It is favourable that 2017 event dates were already posted on the site when it was reviewed in 2016 but news is outdated.

There are many links to information on the topic provided and most are working.

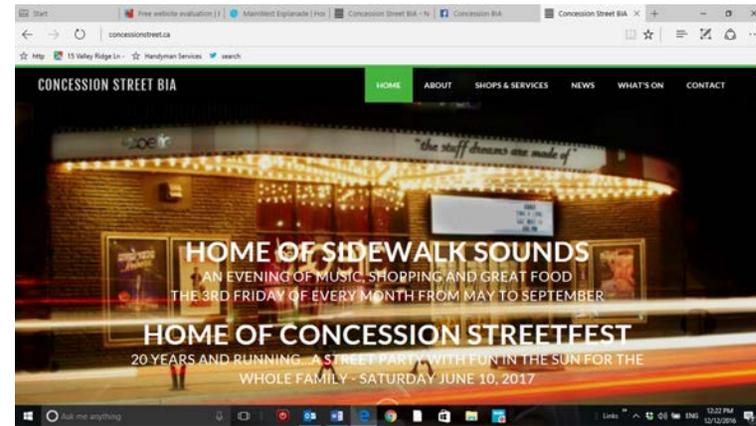
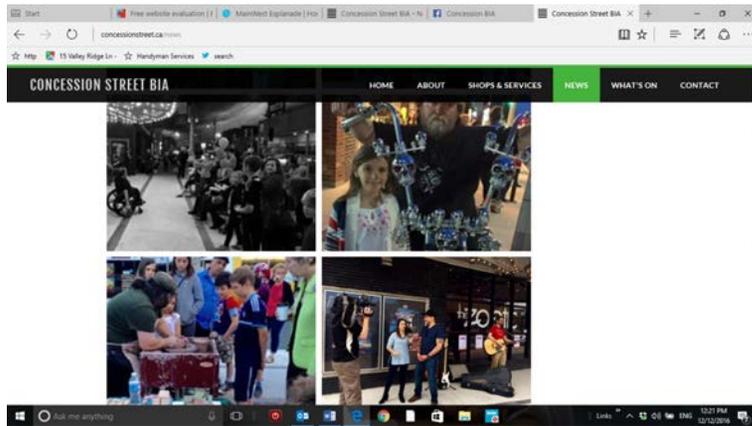
Concession St. BIA Website – Example of Active Links





- ☑ Graphics are relevant and appropriate to the topic. The graphics used on the site are various and some of the title images are busy. The pictures vary greatly in file size but format well to the site and are organic in nature.

Concession St. BIA – Use of Graphics and Images



- ☑ The site offers information that cannot be found anywhere else.
- ☒ The site links to the client Facebook account - the link is broken.
- ☑ Each website page has a defined heading.
- ☑ The site links to the client twitter account - the link is broken.
- ☑ The site links to the City of Hamilton website.

Design

- ☑ The information is easy to use and find.
- ☑ The text is easy to read and not cluttered.
- ☑ The site design is appealing to the intended audience.
- ☑ The links pages are well organized and appealing.
- ☑ The website loads quickly.
- ☑ This website is optimized for printing.
- ☑ The website is mobile friendly and easily navigates by mobile phone.



Authorship

- Author is clearly stated.
- Author provides contact information.
- Feedback to the author is available.

AODA Compliance

Here is a link to the AODA website compliance and guidelines page:

<http://www.aoda.ca/does-your-website-have-to-comply-with-aoda-the-answer-is-probably/>

Facebook - ConcessionBIA

- 572 Likes
- Concession Street BIA facebook page is NOT LINKED on the website and is not up to date (2016)

Twitter @ConcessionBIA

- 1,335 followers
- Concession Street BIA Twitter feed is NOT LINKED on the website and is not up to date (2016)



Social Media

- A review of food service ranking sites such as Yelp and Zomato for Hamilton reveal the following top ten ratings for Concession St. BIA businesses.

Yelp

Coffee

- 4. Relay

Lunch

- 6. Papa Leo's

Zomato

Lunch Popular

- 10. Papa Leo's

Lunch Rating

- 9. Papa Leo's



13.6 Marketing Recommendations

These recommendations are intended to give Concession St. BIA a high-level point of view on things to consider as the BIA develops their next strategic plan and marketing plan. We recommend that Concession St. BIA use the SMART system noted in the appendix to ensure that your planned activities are **specific + measureable + achievable + realistic + targeted**. The exercises noted are located in the appendix.

BASICS – now	SHORT TERM – 1 year
<ul style="list-style-type: none"> • Brand Blueprint exercise • Creation of a Brand Style Guide • Tagline review and definition – build on the current “Where Neighbours Meet” tagline • Target Audience prioritization exercise including the hospital and other nearby large employers 	<ul style="list-style-type: none"> • Update the current website – clean it up, add local photography, update content, manage it monthly • Stronger profile of the Business community – who they are, what they offer, how they are unique • Add an Events Calendar to the website • Evaluate your social media channels and determine what resources you must support them • Evaluate the potential benefit of a neighbourhood Loyalty Program
MID-TERM – 2/3 years	LONG TERM – 5 years
<ul style="list-style-type: none"> • Evaluate the potential benefit of a neighbourhood Loyalty Program • Budget development exercise to increase marketing investment • Launch free WIFI • Busker Plan development 	<ul style="list-style-type: none"> • Develop an enhanced Wayfinding program



14.0 Planning Context – Concession St. BIA

The following statements are presented as information only. Readers to 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.

14.1 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, and
- 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.

14.2 Official Plan

Hamilton's Official Plan designates Concession St. BIA as "Mixed Use - Medium Density Area". This designation permits a full range of retail, service commercial, entertainment and residential accommodation in structures up to six storeys in height. Rezoning applications for up to eight storey structures may be approved 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).



A full range of commercial, institutional and residential uses are permitted except for vehicle dealerships and garden centres (unless an accessory use).

It is intended that the predominant built form be mid-rise and low rise buildings. It is desired that the proportion of multi-storey mixed use buildings with commercial uses at grade be increased; however single use commercial and residential buildings are permitted. Single use office buildings with more than 10,000 square metres are not permitted.

The designation's design policies strongly encourage a compact urban form with a streetscape and building arrangement that supports pedestrian use and creates "vibrant people places". To strengthen the pedestrian focus in areas where it does not currently exist, infill development will be required in a physical arrangement that supports a vibrant and active sidewalk environment (4.6.19). Buildings are to be located close to the street with no parking, drive-throughs or stacking lanes between the building and the sidewalk. Large single use buildings over 5,000 square metres 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). In areas that don't have a secondary plan (which is the case for Concession St. 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).

Concession Street between East 33rd Street and East 15th Street is also designated as a "Pedestrian Predominant Street". The policies for these areas are specified in Section 4.3 of the Plan and in 4.6.29 and 4.6.30. These areas are intended to cater to the pedestrian by creating a comfortable, active and visually stimulating walking environment. They shall have wide sidewalks, buildings oriented to the public sidewalk, outdoor cafes and a high level of streetscape design and activity. Additional policies include:

- A minimum of 75% of the block face shall be developed with buildings,
- Buildings shall be built up to the street line,
- Each building or storefront shall face onto the sidewalk with the main entrance facing onto the street,
- At grade residential uses are not permitted,
- A minimum building height of 2 storey shall be encouraged,
- Sidewalks will be of sufficient width to accommodate the anticipated pedestrian volumes, ensure sufficient space for coordinated street furnishings, tree plantings, etc., and where possible accommodate sidewalk cafes, kiosks and street vendors,
- New buildings will be encouraged to have awnings, canopies or arcades to provide weather protection.



Section 4.6.6 of the Plan prohibits gas bars and car washes on pedestrian predominant streets. Section 4.6.29 indicates that drive-through facilities will only be permitted on a pedestrian predominant street if it can be shown that it can't be located in other Mixed Use – Medium Density areas. It then must demonstrate 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. The existing Tim Horton's drive through at 473 Concession Street is permitted notwithstanding the other policies in the plan.

Throughout the City there are exemptions especially related to auto goods and services (auto dealerships, repair/service, gas stations, etc.) that are exempted from the policies on a property-by-property basis. Any development application should not rely on this report but on their own due diligence with respect to permissions, regulations, zoning, and guidelines.

Implications for BIAs

- The Official Plan strongly supports the increased continuity and intensity of retail and other commercial uses at grade in a built-form that contributes to street animation and pedestrian activity.

14.3 Zoning By-law

A current Zoning By-law Review is modifying the zoning by-law designations for a number of the City's BIAs, excluding those in the Downtown Hamilton. Public consultation has been completed, and staff anticipate bringing forward the recommended By-law amendments for Council's approval later in 2017.

Zoning designations are being proposed in Concession St. BIA.

- (a) The Mixed Use Medium Density – Pedestrian Predominant (C5a) Zone: Concession Street between East 15th Street and Upper Sherman Avenue.

Additional regulations are included that are intended to reinforce an active and vibrant pedestrian realm. These are set out in Section 10.5a of the By-law and include the following:

- Drive-through facilities are prohibited (policies for considering rezoning applications to permit drive-throughs are specified in Section 4.6.29 of the Plan as described above),
- The maximum setback from the street line is 3.0 metres,



- The minimum building height is two storeys (7.5 metres); the maximum is six storeys.
- The height of the first storey is to be between 3.6 and 4.5 metres
- Large office and commercial recreation uses are not permitted (maximum is 2500 square metres)
- The minimum width of the ground floor façade on interior lots is 75% of the width of the lot frontage. For corner lots, the minimum width of the ground floor façade is 50% of the lot frontages on the main street plus flanking street.
- A minimum of 60% of the ground floor façade is to be composed of doors and windows.
- Day nurseries, dwelling units, and places of worship cannot be located on the ground floor except for their access areas and accessory office and utility areas.
- Beverage making establishments, catering, commercial entertainment and recreation, financial establishments, microbreweries and repair services are only permitted on the first storey of buildings.
- Commercial parking facilities are only permitted if wholly contained within a building and are not permitted on the first storey.
- As noted, there are property-by-property exemptions that apply across the entire City for a range of goods and service uses.

(b) The Local Commercial (C2) Zone: This is the proposed zoning for the section of the Concession Street between Upper Sherman Avenue and East 33rd Street and on the southwest corners of Concession Street and East 36th Street and Concession Street and Upper Gage Street.

The intention is to permit small-scale commercial uses serving the surrounding neighbourhood. The maximum commercial gross floor area is 2000 square metres. Individual office units can be no larger than 500 square metres. The maximum height is 11 metres (two storeys).

New developments are encouraged to be pedestrian oriented:

- The minimum width of the ground floor façade on interior lots is to be 40% of the width of the lot frontage. For corner lots, the minimum width of the ground floor façade is to be 50% of the lot frontages on the main street plus flanking street,
- No parking, driveways, stacking lanes or aisles are permitted between the building façade and sidewalk,
- All principal entrances are to face the street and have direct access to the public sidewalk
- Residential uses cannot locate on ground floor of buildings



(c) Residential Zoning Designations (E and E2): The sections of the Concession Street BIA west of East 15th Street and East of East 33rd Street are zoned for residential uses. Limited commercial and institutional uses are also permitted. As noted above, C2 (local commercial) zoning is proposed on the southwest corners of Concession Street and Upper Gage and Concession Street and East 36th Streets.

Implications for BIA

- The proposed C5a Zoning Designation strongly supports the intensification of retail and service uses along the sidewalk and the reinforcement of an active pedestrian environment. While well-intentioned, the impact of two of its regulations may warrant monitoring and review in the future:
 - **Limits on commercial recreation and office uses:** Sections 10.5a.3(e and f) limit these uses to a maximum of 2500 square metres and 10.5a(i) limits commercial recreation and entertainment uses, financial institutions and a few other uses (see above) to the ground floor of buildings. It is noted that gyms, cinemas, theatres, offices, etc. are being successfully incorporated in intensive pedestrian-oriented commercial districts and shopping centres in other locations by utilizing the upper floors of buildings with a pedestrian-friendly entrance and lobby at grade. This form of development would not be permitted by C5(a) zoning, yet might be desirable in the future. Accommodating these uses on the upper floors enables them to locate in pedestrian-oriented areas without “deadening” the sidewalk, probably removing the need to limit them to 2500 square metres.
 - **Limits on the location of Commercial Parking Facilities:** Section 10.5a.(i)(iii) limits the location of commercial parking facilities to the interior of buildings. The policy objective behind this restriction supports the pedestrian-orientation and intensification of commercial uses. However, if parking supply becomes an issue, it will make it less feasible to provide off-street public parking. Above and below grade parking structures are expensive to build and need to include a large number of spaces for their operation to be economically feasible. It is suggested that parking demand and supply be monitored in areas with C5a zoning, and consideration be given to opportunities for small surface parking lots appropriately located where there is a demonstrated need (e.g. where streets outside but near the C5a zone cannot accommodate public parking lots and on-street parking is insufficient). Encouraging large scale private developments to add public parking spaces to their garages would be another strategy to increase public parking supply.



14.4 On Street Patio Program

Staff recommendations to approve a “permanent on-street patio program” were considered and approved by City Council on March 8, 2017. This follows up on a Pilot Program implemented in 2016.

The on-street patio program will enable restaurants in BIAs throughout Hamilton to apply for permits to locate outdoor patios in on-street parking spaces from May 1 to October 31 each 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.

Implications for BIA

- On-street patios are popular with the general public and help to animate the street and draw people to the area. We consider the availability of the program to be a positive opportunity which the BIA may wish to support. There are unlikely to be any negative consequences unless a concentration of restaurants should develop in the future. Should that happen, the BIA may wish to monitor the impact of additional patios on its supply of on-street parking spaces.



15.0 Trends

Omni-channel

The evolution of retail has shifted from traditional bricks and mortar retailing to a full spectrum of consumer oriented anytime anyplace 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 store and buying in line 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 value of the business operation from either an asset perspective or an operational perspective.

Those businesses that are reliant on price or convenience as their main competitive advantage are the most impacted by the shift to omni-channel retail including online sales. If the same item is available cheaper or can be delivered on the same day, then the consumer may opt for that retail channel. For businesses that are more experience oriented, are geared to social gathering and building community, they are more resilient to these pressures and changes.

At present the online shopping channel is doing very well at competing on price and convenience but having difficulty competing on experience.

Still, most 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 resulting 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 more showrooms and do not need a fully stocked back room full of inventory or merchandise. These businesses are more nimble and increasing productivity while keeping expenses such as rent low.

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 are shop for some higher quality pieces that they match with basic items. For example, male office workers have indicated that they will spend money on a high-quality suit but will go to retailers such as Joe Fresh to buy their dress shirts as they tend to go through them on a frequent basis.

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.

Mobile

Along with omni-channel, the growing trend is for mobile commerce including delivery such as Urber 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.

Sold 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.

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 sharings 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.



Demographics is Destiny

Analyzing where local area demographics 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 Y is a smaller generation and businesses will see less demand for urban housing and eating out.

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 moving forward.



APPENDIX



Appendix: BIA Marketing Planning - CHECKLIST

THE BASICS	WHAT
1. Brand Blueprint - Vision + Mission	<ul style="list-style-type: none">• VISION = The ultimate destination of your organization• MISSION = How the organization plans to get there• These should not change unless there is fundamental shift in your organization or focus
2. Brand Blueprint - Promise	<ul style="list-style-type: none">• The pledge that you make (should be delivered through every action)
3. Brand Blueprint - Benefit	<ul style="list-style-type: none">• The positive effect that this brand will have on your target audiences
4. Brand Blueprint - Positioning	<ul style="list-style-type: none">• What you want people to think of you compared to others
5. Brand Identity	<ul style="list-style-type: none">• The brand character and style of your BIA• How you express yourself – your character, personality and voice• Tone, manner, look and feel• Can be a combination of a logo, symbol (icon), signature (wordmark) and tagline (differentiated offer)• System of fonts and colours
6. Brand Style Guide	<ul style="list-style-type: none">• Simple guide that summarizes the Blueprint and Identity• For use for all partners from a marketing perspective• Makes it easier for all communication partners to execute "on brand"



BIA Marketing Planning - GUIDELINES

ELEMENT	FORMAT
ONE PAGE PLANS	<ul style="list-style-type: none"> • Keep it simple • Easy reference for the whole organization • More likely to follow it if it is not a big, complicated document • Include: Current Situation + Objectives + Key Metrics + Target Audiences + Strategies + Tactics
DEFINITIONS	<ul style="list-style-type: none"> • CURRENT SITUATION = Brief SWOT Analysis • OBJECTIVES = The results you want to achieve (i.e. Stimulate engagement) • KEY METRICS = How you will measure our success • TARGET AUDIENCES = Who you are focusing your efforts on (i.e. Members, Citizens, Tourists, Government) • STRATEGIES = What you we going to do to achieve your objectives (i.e. Community Outreach) • TACTICS = How are you going to achieve our strategies (i.e. Brand Ambassador Teams)
SMART GOALS	<ul style="list-style-type: none"> • Define your strategies and tactics using the SMART system • Each one should be: specific + measureable + achievable + realistic + targeted
PRIORITIZATION CRITERIA	<ul style="list-style-type: none"> • If it isn't a SMART strategy it doesn't make the list • You need to check off all the SMART boxes, not just some
RESOURCES	<ul style="list-style-type: none"> • Consider both \$ resources and human resources as you make your plan • These fit into the achievable + realistic SMART boxes
ONE PAGE CALENDAR	<ul style="list-style-type: none"> • Yearly activities plotted • Easy reference for the whole organization • More likely to follow it if it is not a big, complicated document • For each strategy note the tactic + budget + timing + resources + success measurement



BIA Marketing Plan - CHECKLIST

YEARLY	ACTION
1. Situation Analysis	<ul style="list-style-type: none"> • Assessment of the marketing activities from the previous year • What was successful, what wasn't and why • What has changed in your area that influences your stakeholders and your plans going forward
2. Trends	<ul style="list-style-type: none"> • What's happening in the world of tourism, retail, consumer behavior • Economics, Culture, Development, Attractions, Demographics etc.
3. Competitive Analysis	<ul style="list-style-type: none"> • SWOT analysis of your top 5 competing BIA's • What did your competitive BIA's do last year • What was successful and why • How did it impact your success

YEARLY	ACTION
1. Strategic Advantages	<ul style="list-style-type: none"> • Based on your yearly analysis, have your strategic advantages changed • Update what they will be for the next year
2. Target Audience Profiles	<ul style="list-style-type: none"> • Based on your yearly analysis, have your target audiences changed in any way • Update who they are, how they have changed for the next year • Consider if the order of prioritization needs to change • Consider if the amount of emphasis on each of them needs to be changed
3. Target Audience Key Messaging	<ul style="list-style-type: none"> • Based on your Target Audience profiling, review what the "key" messages are that you want to convey to each group • They will differ based on your role with each of them and what strategies you are putting in place to engage, inform and inspire them with



WEEKLY or MONTHLY	ACTION
1. Website Updates	<ul style="list-style-type: none">• Be current or you will not maximize the benefits• Ensure that the posts are “on brand”
2. Social Media posts	<ul style="list-style-type: none">• Be current or you will not maximize the benefits• Ensure that the posts are “on brand”
3. Stakeholder engagement	<ul style="list-style-type: none">• Regular communication with your members is critical• Keep it simple (one page e-bulletin)
3. Marketing Plan & Calendar review	<ul style="list-style-type: none">• Where you are at, what is working, what isn't and why• Revisions to ensure success