



Downtown Hamilton BIA
Commercial Market Assessment Update

Final
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EXECUTIVE SUMMARY



Executive Summary

Introduction

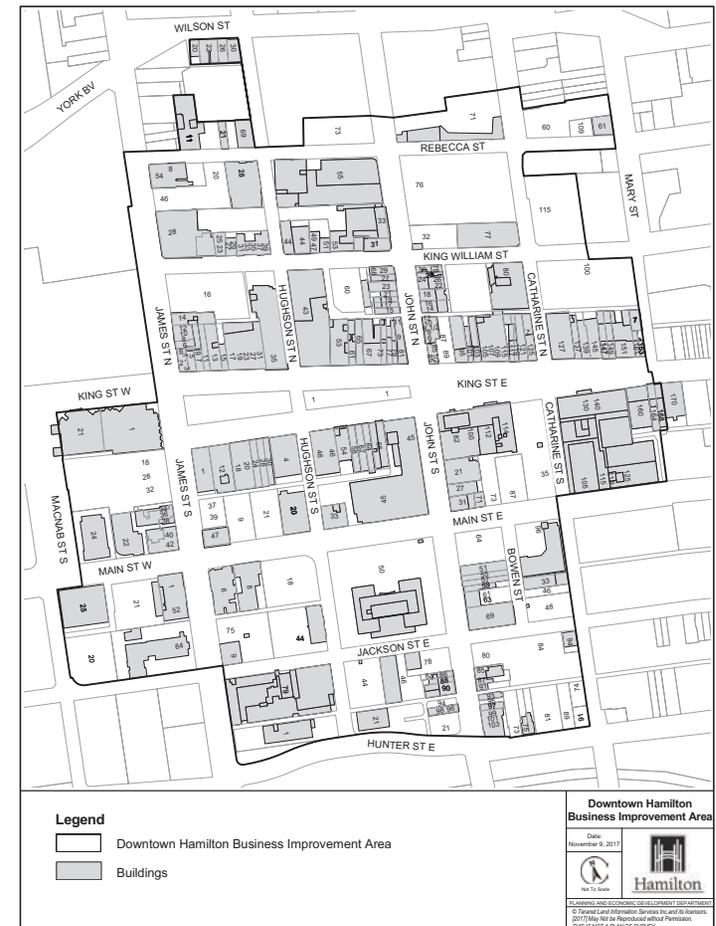
360 Collective was retained by the City of Hamilton (City) and Downtown Hamilton Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of Downtown Hamilton BIA area completed in 2009/2010. The study process included a thorough review of the demand and supply characteristics of the BIA to inform changes to their internal action plans.

Downtown Hamilton BIA

The process included:

- Review of movement into and through 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
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and to be reviewed with BIA members at an open workshop. The subsequent suggested action plan was based on this input.





SWOT

Strengths

- Changing local population and target markets to support businesses
- Strength of Downtown as an office worker concentration and an economic engine for Hamilton
- Growing local population of young professionals, students, and empty nesters (as well as some young families) that will feed demand for local goods and services but also will be workers in the office buildings
- Investment in properties in anticipation of new business opportunities
- Positive public relations, press, news articles on the growing attractiveness of Downtown Hamilton

Weaknesses

- Transition affecting older businesses and those that cannot adapt to the changing target markets
- Construction worries and pre-occupation with LRT that is many years out
- Over speculation on land values and rents (and MPAC assessed values) that may drive out some tenants
- Lack of office type space that allows businesses to transition in Downtown (from incubator space to Triple A space)
- Continued concerns related to cleanliness and safety
- Lack of full night time activity
- New resident and night time activity potential clashes

Opportunities

- Increased density and socio-economic shifts that allows for a local neighbourhood retail economy to grow
- Growth in new residents that will supply a new base of workers for businesses wanting to establish more creative and innovative business concepts (access to new talent base)
- Infrastructure improvements that allow easy and convenient access to Downtown that balances public transit, vehicular, cycling, and walking demands
- Enhanced Downtown Hamilton BIA identity that harnesses the change happening

Threats

- Loss of some long-standing businesses that cannot adapt to new target markets in Downtown
- Continued reliance on ample surface parking, low parking rates, and low lease rates as primary factors in Downtown Hamilton's business attraction



Changes in Recommendations from 2009/2010 to 2017/2018

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

Changes in Recommendations from 2011 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Have requisite staffing resources for the BIA organization	Have expanded the staffing and have hired a marketing coordinator (consumer and investor relations). To date, the marketing coordinator is focused on consumer relations and less on investor recruitment
Ensure that all smaller districts in the BIA have their issues addressed	The BIA continues to work on internal communications
Work collaboratively with City of Hamilton departments and other organizations	Yes, but this is always a work in progress
Expand boundaries	The BIA's attempt to expand boundaries was not successful
Continue to grow BIA budget	BIA budget has been increasing but is below competitive areas in Ontario
Convene meeting with property owners and real estate professionals	There is a renewed effort for the BIA to take a leadership role
Incentives	The City of Hamilton's incentive toolbox is extensive and developers have availed themselves of incentives related to residential as well as some commercial programs
Maintain clean and safe programs	The Cleanliness and Security Taskforce along with the Alley projects have continued to increase safety and cleanliness aspects. A renewed emphasis on safety is noted by the membership as a priority
Gore Park Master Plan	The Gore Park redevelopment is almost complete. The next stage will be for the abutting private sector buildings to be redeveloped and leased



LRT	LRT is an on-going program and will be until there is a finalized contractor and a construction calendar submitted.
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Vision

Previous Vision

The previously articulated vision for Downtown Hamilton BIA was to focus on three key goals:

- Hospitality
- Neighbourhood
- Unique retail

The updated vision should be based on creating an 18/7 environment that is supportive of visitors' needs, is a draw in its own right, and is a complete neighbourhood for the growing local population. Downtown Hamilton will support a robust daytime activity through office workers, students, and other visitors throughout the day. An active night time economy based on workers staying late after work, local residents, regional residents, and arts and culture, entertainment, and sporting event attendees who want to be in an active urban environment. And an evolving weekend economy based on a growing residential sector as well as outside visitation for everything from running errands at the grocery store, to cafes, to activities and shopping to support their daily lives



Downtown Hamilton BIA Action Plan

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

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

Each action item includes the following elements:

- Specific task
- Measurement
- Action item
- Responsibility
- Timeframe

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

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



Organization

STRATEGIC GOAL

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

RATIONALE

- A financially dedicated organization committed to Downtown Hamilton BIA's boundaries is required to support the members and create an environment where it is possible for businesses to be successful

DESIRED RESULT

- Consistency of organizational leadership that members can rely on for advocacy, internal communications, marketing, and to facilitate economic development

HOW TO ACCOMPLISH

Overall, the Downtown Hamilton BIA is a well-organized group. The following chart highlights suggested general recommendations for the Downtown Hamilton BIA organization to consider on an ongoing basis.

Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Increase internal communications	<ul style="list-style-type: none"> • Commit to key deliverables such as monthly email newsletter, weekly email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only 	<ul style="list-style-type: none"> • Develop a calendar of communications correlated to different mediums • Ensure BIA database is current – if not, work with City to get contact information 	BIA Executive Director	Immediate and ongoing



<p>Ensure BIA organization is current with City required policies – social media and procurement</p>	<ul style="list-style-type: none"> • Number of policies in place and year they were last updated 	<ul style="list-style-type: none"> • Ensure BIA has updated social media and procurement policies • Review and update these and other policies on a regular basis 	<p>BIA</p>	<p>Immediate</p>
<p>Partnerships</p>	<ul style="list-style-type: none"> • Number of valuable partnerships • Review partnerships every six months to every year 	<ul style="list-style-type: none"> • Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA • Prioritize partnerships based on current and future impact to the BIA (Jackson Sq., Hamilton Place, Tourism Hamilton, International Village, etc.) 	<p>BIA</p>	<p>Ongoing</p>
<p>Review BIA boundaries</p>	<ul style="list-style-type: none"> • Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> • Every two years, review boundaries and determine if changes are merited 	<p>BIA potentially in coordination with City Urban Renewal</p>	<p>Ongoing</p>



		<ul style="list-style-type: none"> BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Downtown Hamilton BIA, are business competitive or complementary, and pros/cons on BIA levy 		
Change committee structure to Task Force structure	<ul style="list-style-type: none"> Number of task forces and completed items 	<ul style="list-style-type: none"> Develop short-term task forces that board members and members can work on for short durations to produce results 	BIA	Short Term
Focus AGM and other meetings on positive learnings	<ul style="list-style-type: none"> AGM participation and feedback process 	<ul style="list-style-type: none"> Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA Bring in speakers on topics of 	BIA	By next AGM



		relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc.		
Increase the BIA budget	<ul style="list-style-type: none"> • Monitor assessed values • Monitor commercial development • Monitor similar sized BIAs in Ontario 	<ul style="list-style-type: none"> • Budget should be increased in line with commercial development and commercial assessment changes • Consider increasing the budget to similar sized BIAs in Ontario 	BIA and City	One to two years
Review BIA brand in light of Downtown changes including increased residential density, an emerging local neighbourhood, LRT, and the changing office sector	<ul style="list-style-type: none"> • Review branding to ensure it is current 	<ul style="list-style-type: none"> • Formally review the Downtown Hamilton BIA brand to ensure it is relevant to the new realities of a changing Downtown Hamilton 	BIA	Two to three years



Economic Development

STRATEGIC GOALS

Downtown Hamilton BIA will provide an opportunity for:

- Retail and commercial businesses to continue to thrive and expand to ensure that the BIA area and the Downtown overall is an economically sustainable community (employment for local residents as well as regional residents and a fiscally sustainable tax base).
- Attract high-quality workforce to live and work in Downtown Hamilton.
- Nurture local entrepreneurs to start up and expand new businesses.
- Attract outside investment in terms of both retail and office.
- Provide opportunities for businesses to grow in place in the Downtown as they continue to evolve.

RATIONALE

- Allows for new business sectors to grow and take advantage of Downtown Hamilton attributes.
- Strengthens processes allowing Downtown Hamilton businesses to stay competitive and innovate.
- Increases real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of the Downtown Hamilton BIA.
- Creates a diversified economy.

DESIRED IMPACT

- Diversified retail and commercial economy in select growing and sustainable business sectors.
- Depth and specialization in each of those sectors so that they continue to grow and draw further investment.
- Enhanced regional draw capabilities including regional and tourist visitation, business meetings, conferences, and conventions, education-related and students, etc.
- Sufficient employment opportunities for local downtown residents (including youth, young professionals, families, active seniors, and empty nesters).
- Growing foundation of commercial assessment enabling Hamilton to provide high-quality services.



HOW IT GETS DONE

- The City of Hamilton and the BIA allows for business opportunities to grow through retention, expansion, and recruitment programs.
- To foster an economic climate that supports the economic health of existing businesses and encourages the location of new businesses that fit within the overall vision.
- Will be based on five key strategies:

Five Key Strategies

1. Identify both retail and commercial opportunities, gaps, and strengths to build upon
2. Define investor recruitment targets
3. Strengthen infrastructure
4. Review planning context
5. Make investment easier



Identify Opportunities, Gaps, Strengths to Build Upon

There are several sectors with good potential for future development and growth. We are suggesting that the City and the Downtown Hamilton BIA triage these potential opportunities and select one or two for initial focus and action.

Selection criteria should include:

- Local partner(s) active in the sector and interested in participating (time and resources) in its expansion.
Appropriate partners might be:
 - local businesses interested in their own expansion by increasing local critical mass in the industry, strengthening their supply chain and market for their services/products, building the local labour pool of specific skills, etc.
 - institutions such as the McMaster University, owners of cultural venues, major employers, major developers, Jackson Square, etc. who are interested in partnering
- Good regional growth prospects; this is best assessed at a fine-grained level since very narrow and specific industry niches often present the strongest growth opportunities
- Sector is aligned with Ontario's economic development priorities, RTO's priorities, offering opportunities for leveraging their resources and participating in joint initiatives.



Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Regional Hub	Finance, Insurance & Real Estate (FIRE), business services, government services, medical and non-profit head offices and agencies	<ul style="list-style-type: none"> • Build on an existing strength • Have in the past presented good candidates for downtown space • Develop in partnership with local landlords/developers; develop a target list of regional prospects and pitch Hamilton's quality of life and quality workforce living in and near Downtown, commitment to infrastructure development including LRT, walkable downtown, competitively priced available floor space and vacant lots, and local business testimonials and critical mass aspects
Education Centre	Support expansion of programming at McMaster Downtown campus locations and leverage its presence to attract other specialized post-secondary schools and research institutes Support student-led programs	<ul style="list-style-type: none"> • Build on existing strength • Work in partnership with McMaster and other colleges/schools in and near Downtown • Identify potential expansion opportunities and pitch Hamilton's lifestyle, walkable downtown, competitively priced available floor space and vacant lots, student infrastructure and testimonials
Incubator	Small-scale value-added local production: food, agriculture, artisan manufacturing; Retail distribution in Hamilton and Downtown Hamilton stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> • An underdeveloped resource which diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in the supportive ecosystem) • Develop in partnership with value-added agriculture businesses, community, artisans, existing micro-businesses, local institutions, steel industry, and with potential provincial support • Build a value-added agriculture-related program tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Hamilton Farmers Markets, co-tenancy in



	Description	Rationale and Tactics
		<p>stores, organizing stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.)</p> <ul style="list-style-type: none"> • Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts Council) to explore their needs and best practices and build strategy and ecosystem to support their growth. Tactics parallel those described above for food. • Start by identifying Hamilton residents currently making and selling artisan products – Etsy manufacturers • Encourage craft type markets
Digital and Creative	Creative industries - website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> • Prerequisite: high-speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity. • Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.
Arts & Culture	Performing and visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> • Leverage assets in the Downtown Hamilton BIA such as restaurants and cafes, Connaught, Lister Block, Gore Park, GO Station, new park on Rebecca St., and those nearby such as Theatre Aquarius, Hamilton Place, Art Gallery of Hamilton, Library, Jackson Square, etc. as venues for display and performance. • Partner with venues and local arts organizations. • Pursue two-stream strategy: 1. Nurture and develop opportunities for local artists and performers to earn income and gain exposure to broader audiences (tactics similar to those described for artisans); 2. Support enhanced programming, festivals and exhibits (temporary and



	Description	Rationale and Tactics
		<p>permanent) at venues. Include both locally based programming and attraction of touring groups/performers/exhibits and festivals.</p> <ul style="list-style-type: none"> • Synergy with Hamilton music strategy and tourism development. Build the reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community)
Tourism	Accommodation, festivals, sporting event/tournament attraction, shopping, arts and cultural programming, recreational opportunities, conventions, trade shows, business meetings.	<ul style="list-style-type: none"> • Build on strength of the Downtown food services appeal • Work with Tourism Hamilton to strengthen its capacity to strategically market Hamilton and Downtown as a destination. Stay true to the brand (See Section 10.5 below) • Leverage resources and expertise available through Ministry of Culture and Tourism and marketing avenues available through RTO and Tourism Hamilton. • Evaluate operation and services provided by Tourism Hamilton. Consider tactics for getting information about things to see and do; visitors, locals, new residents, workers, etc.. • Develop statistical package on current visitation for monitoring plus business attraction (e.g. there might be untapped potential for a downtown boutique hotel). • Work at developing synergy between the different activity zones. What can be offered to encourage cross-promotion? • Strategically invest in place making and wayfinding (see separate discussions). • Consider undertaking an event attraction strategy in partnership with benefiting venues. Define targets based on Hamilton's competitive assets (a sub-category of provincial trade shows, conventions, sporting events and/or festivals), prospect list and key messages and facts. It may be



	Description	Rationale and Tactics
		necessary to offer financial concessions or incentives depending on the competitive environment.
Film & TV Production	On-location shooting in Downtown Hamilton, supporting accommodation, food & Beverage, shopping, and associated support services	<ul style="list-style-type: none">• Leverage assets in heritage main street environments to build business for local accommodation, food & beverage, services and retail businesses and income for BIA and City (permit fees) and local residents and businesses (location rental, stipends to “extras”).• Increase working relationship with City of Hamilton film to evaluate the potential to increase on-location production activities in and around Downtown Hamilton. For example, add locations to Ontario and Hamilton location library and participate in hosting “Fam Tours”.• Cost/benefit analysis of setting up a film permitting service to minimize community disruption that can be associated with filming and generate revenue.



Key Retail Sector Opportunities

Our evaluation of Downtown Hamilton BIA and the greater Downtown shopping districts and consumer research suggests that the following types of stores and services offer good opportunities for location and expansion. It is suggested that these recruitment opportunities be pursued by the landlords and brokers and supported by the City of Hamilton Economic Development, Downtown Hamilton BIA, and the Chamber of Commerce. The City and the BIA can support their private sector recruitment activities by supplying consistent branding and key messages and helping to develop new marketing tools.

Each commercial district in and near Downtown Hamilton BIA has its own distinctive character and mix of stores which should be maintained and enhanced in the future. Research has shown that it is the number of competitive and complementary business districts near one another that actually re-enforces and makes them all stronger. Consumers want a range of choices. These districts work together to collectively attract shoppers, the majority of whom visit several different areas on the same trip and it is recommended that they be marketed and promoted collaboratively. However, the business recruitment targets and enhancement strategies for each district should be differentiated, as is summarized below:

King St. E.

Location: King St. E. of James St. to Mary St., north side of the street

Niche: Entertainment focused main street

Target Market: local Downtown workers and visitors as well as regional visitors, business meeting visitors, pass-by traffic (errands), arts/culture/entertainment/recreation visitors, local residents

Requirements for Success:

- Walkable street with wide sidewalks - (lighting, benches, tree canopy, banners, artwork, sidewalk widths, urban plazas, gateways)
- Entertainment oriented with bright lights, lit up buildings, artwork, gateways
- Places for ephemeral, constantly changing, performances, art, etc.
- Locations for pop up music venues both small and large
- Better facades, large windows, limited use of window barriers, ground level animation

Commercial Mix:

- Quality restaurants and cafes (breakfast, cafes/lunch, coffee/tea, and quick casual dinner) – high turnover (Bier Mkt, Hard Rock Café, South St. Burger, Korean BBQ)
- Night time economy restaurants, pubs, hangout places



- Leisure-oriented retail including sportswear, activewear, (e.g., specialized sporting goods store with a mini basketball area set up inside), book and music stores,
- Pharmacy including some grocery items
- Creative offices on upper levels
- Medical offices on upper levels
- Fitness, creation, dance, martial arts on upper levels
- Entertainment such as small movie house on upper levels

King William

Location: East of James St. N. to International Village

Niche: See and Be Seen Atmosphere

Target Markets: Daytime office workers and visitors, local residents, regional visitors, arts and entertainment visitors – related to those who want visibility

Requirements for Success:

- Create a two-sided retail street through infill redevelopment opportunities
- Allow for patio development with lighting and creative patio enclosures
- Upper levels used for creative offices that blend work and eating as well as those businesses that blur lines between office and retail (e.g., coffee shop that allows shared work environment)
- Other supporting industries such as barbershops that have a “see and be seen” atmosphere
- Add softer lighting that makes people look good, fairy lights, softer up lighting
- Quality streetscape materials
- Ensure sound building materials as well as measures to baffle sound that may come from the restaurants

Commercial Mix:

- Unique restaurants, cafes, coffee/tea, breweries
- Shared work and retail spaces
- Blurred retail categories and lifestyle concept stores, vintage stores
- Retail that has significant people gathering and social gathering opportunities (barber shops that have social gathering spaces such as alcohol, billiards, etc.)
- Entertainment
- Creative offices on upper levels



Restrictive Uses

- Keep the sizes of eating establishment to under 200 m² in general (don't want large nightclubs and large restaurants that overpower other eating establishments) and keep the size of dance floors or stages to a minimum within any eating establishment



James St. N. – Main St.

Location: King St. to Wilson St.

Niche: Transit Hub; Gateway to James St. N. – transition from the office core to the arts and entertainment district to the north

Target Markets: Office workers, local residents, arts and entertainment visitors, transitioning visitors from further north to the central core (and vice versa)

Requirements for Success:

- Flexible sidewalk that can be bumped out during weekends
- Currently, a single-sided retail street so each business must stand out
- Restaurants under 500 m²
- Emphasis on signage, retail entrances, ground floor retail heights that create an inviting atmosphere
- An urban plaza along James St. N. (at King William or Rebecca) to allow for a transition from the core to the retail district to the north
- Office workers on both sides of the street in upper levels
- Boutique hotel

Commercial Uses:

- Restaurants, pubs, cafes, coffee shops
- Health food supplements, pharmacy, drug store
- Shoe stores, footwear
- Quick and efficient retail goods and services
- Business associated with the Circular or Sharing Economy – vintage, antiques, rentals, etc.



John St. S.

Location: Main St. to Hunter St.

Niche: Gateway, Transit Hub

Target Markets: office workers, Transit visitors, local residents, regional pass by traffic

Requirements for Success:

- High visibility for businesses
- Ease of stopping

Commercial uses:

- Quick and easy food services -healthy, fast, quick casual
- Lunch and after dinner eating and drinking
- Business support retail and services
- Specialty food, greengrocer, pharmacy / drug store
- Medical and dental services
- Upper-level offices



Gore Park

Location: King St. E. south leg east of James St.

Niche: Pedestrian Mall

Target Markets: Local residents, workers, regional visitors, entertainment visitors

Requirements for Success:

- Clean and safe
- Patios that extend out towards the park space
- Force pedestrians within 8 m of the business entrance through the placement of art and other streetscaping elements

Commercial Uses:

- Quick casual cafes, restaurants, coffee shops
- Night time food services
- Games and cafes
- Specialty leisure retail (destination) – men's clothing and accessories

Restrictions: eating establishments should be under 500 m²

Economic Development Suggested Recommendations

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

		<ul style="list-style-type: none"> • Hamilton expatriates (“Come Back to Hamilton” campaign) • GTA residents • Independent and small chain franchises • Others 		
Strengthen infrastructure	<ul style="list-style-type: none"> • Business turnover decreased • New business openings 	<ul style="list-style-type: none"> • New streetscape plans • Investment in WiFi in Downtown • High-speed internet and broadband width • Parking strategy • Transit strategy • Incubators and a complete range of office tenancies 	<ul style="list-style-type: none"> • City and BIA 	Mid to Long Term
Make Investment easier	<ul style="list-style-type: none"> • New business openings • New mixed-use developments 	<ul style="list-style-type: none"> • Reduce costs, risks, and barriers to investment including • Competitive tax rates, development friendly approval processes, market current opportunities 	<ul style="list-style-type: none"> • City and BIA • BIA to educate themselves and attend training on development pro formas and industry terms to ensure the BIA understands key redevelopment opportunities 	<ul style="list-style-type: none"> • Medium Term



		<ul style="list-style-type: none">• Develop sector-specific recruitment materials• Review all incentives and marketing of incentives against the economic development plan• Increased residential and office mixed-use developments	<p>issues and opportunities</p> <ul style="list-style-type: none">• BIA can support development opportunities and commission economic impact studies that support redevelopment with public parking	
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Physical Improvements and Programs for Enjoyable Shopping

STRATEGIC GOAL

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

RATIONALE

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

DESIRED IMPACT

- Increased dwell time for visitors to stay longer, shop more and spend more
- Offers opportunities for people to meet, socialize, build community
- Creates an environment that attracts further investment

HOW TO ACCOMPLISH

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



Physical Improvement Suggested Recommendations

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



	<ul style="list-style-type: none">•	<p>increase signage to Downtown</p> <ul style="list-style-type: none">• Constantly update any digital wayfinding elements		
<p>Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases</p>	<ul style="list-style-type: none">• Conduct a study	<ul style="list-style-type: none">• Work with City of lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy	<p>BIA and City of Hamilton</p>	<p>One year</p>
<p>Continue to review other programs such as Clean and Safe, Alleyways, Gore Park, and other programs associated with the public realm</p>			<p>BIA and City</p>	<p>Ongoing</p>



Marketing

CONTEXT

- Current branding positions Downtown Hamilton BIA well for key attributes related to the “Core” messaging.

STRATEGIES

- Updates to the brand should be reviewed within a two to three year time period to ensure that the changing nature of the Downtown including residential intensification, office worker changes, LRT, etc. are reflected in the brand positioning.
- Continue to update the BIA's calendar of events program.
- Use the brand as an investor attraction piece.

RATIONALE

- Ensure that changes are reflected in the positioning as the Downtown becomes more neighbourhood oriented
- Ensure the brand and marketing continue to address social issues such as real and perceived safety and cleanliness issues

DESIRED IMPACT

- One consistent, focused brand story that will attract both investors and regional visitation to all of the commercial and retail areas of the City.

HOW IT GETS DONE

Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Review calendar of events and promotions calendar	<ul style="list-style-type: none"> Assess based on markets targeted and success of attracting that segment Cost to benefit analysis 	<ul style="list-style-type: none"> Complete an assessment of the marketing activities from the previous year – determine what was successful and what wasn't and why based on evaluation criteria Assess what has changed in the Downtown and City that influences your potential participants and visitors and ultimately your plans going forward 	<ul style="list-style-type: none"> BIA 	<ul style="list-style-type: none"> Ongoing
Review vision, mission statement, and brand	<ul style="list-style-type: none"> How many members are aware of these statements and positionings 	<ul style="list-style-type: none"> Update on a continual basis to reflect changes in the BIA Review overall brand positioning in the context of a high-density downtown 	<ul style="list-style-type: none"> BIA 	<ul style="list-style-type: none"> Ongoing



BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS

1.0 Introduction

360 Collective was retained by the City of Hamilton (City) and Downtown Hamilton Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of Downtown Hamilton BIA area completed in 2009/2010. The study process included a thorough review of the demand and supply characteristics of the BIA to inform changes to their internal action plans.

The process included:

- Review of movement into and through the BIA 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
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

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

Downtown Hamilton BIA





2.0 Visitors to Downtown Hamilton BIA

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

- Vehicular movements along James St., King St., and Main St. in Downtown Hamilton as well as several other side streets such as King William, John St. and Hughson St.
- On-street parking usage as a proxy for visitation
- Pedestrian intersection volumes and movements
- Observational data
- Key person interviews with retailers and property owners as well as City staff and the local Councillor

2.1 Vehicular and Pedestrian Movement in Downtown Hamilton BIA

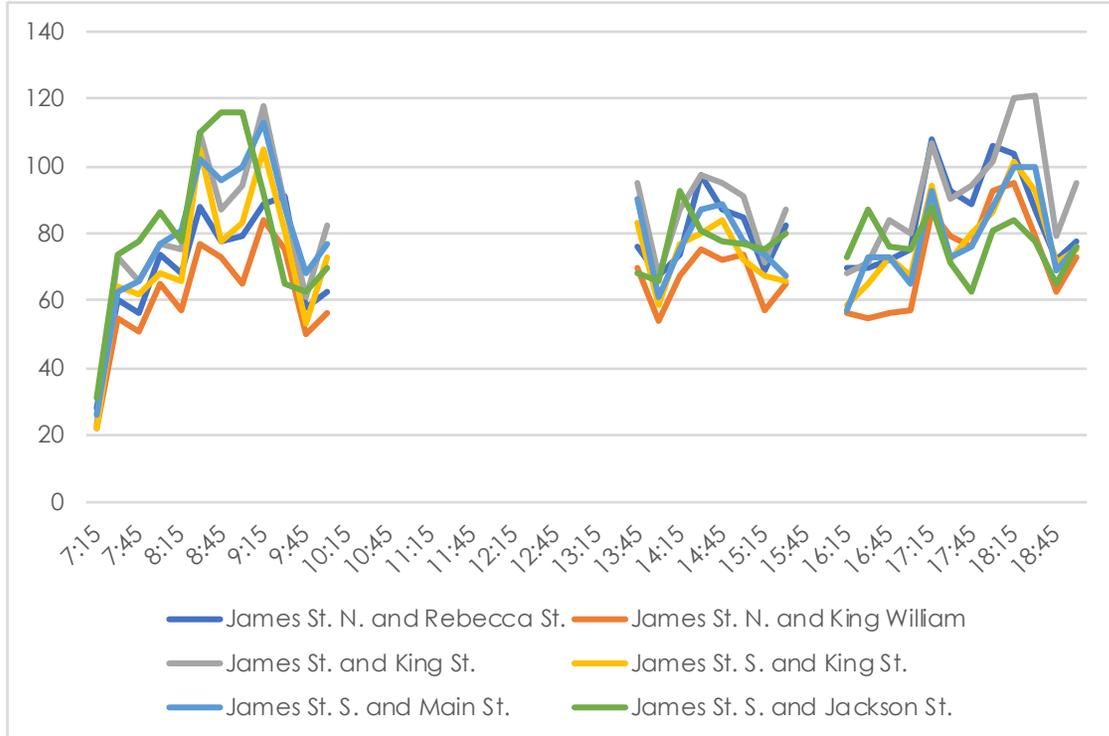
Vehicular and Pedestrian Volume 7 and 8-Hour Counts at Key Intersections along King St.

<u>Intersection</u>	<u>Date</u>	<u>8-hour Vehicular Count</u>	<u>8-Hour Pedestrian Count</u>
Main St. E. and James St. S.	Thur Nov 30 2017	24,429	3,703
Main St. E. and John St. S.	Thur Nov 30 2017	22,428	3,402
King St. and James St.	Thur Nov 30 2017	18,521	10,291
King St. South and James St. S.	Thur Nov 30 2017	5,527	2,249
King St. E. and John St.	Thur Mar 30 2017	12,141	3,444
King St. E. and Catharine St.	Thur Nov 30 2017	10,449	4,182
King St. E. and Mary St.	Fri Aug 22 2014	6,272	2,956
King William St. and James St. N.	Thur Nov 30 2017	7,706	2,119
King William St. and John St. N.	Thur Mar 28 2017	4,781	1,790
Rebecca St. and James St. N	Thur Nov 30 2017	7,341	1,388
Jackson St. and James St. S.	Thur Nov 30 2017	9,238	2,461
Jackson St. E. and John St. S.	Thur Nov 30 2017	9,452	3,750

Source: City of Hamilton

Focusing on movement directly on King St. E., Main St. E., and James St. the following three graphs illustrate vehicular traffic throughout the day on the major streets throughout the BIA.

Vehicular Traffic Patterns on James St. Northbound in Downtown Hamilton BIA

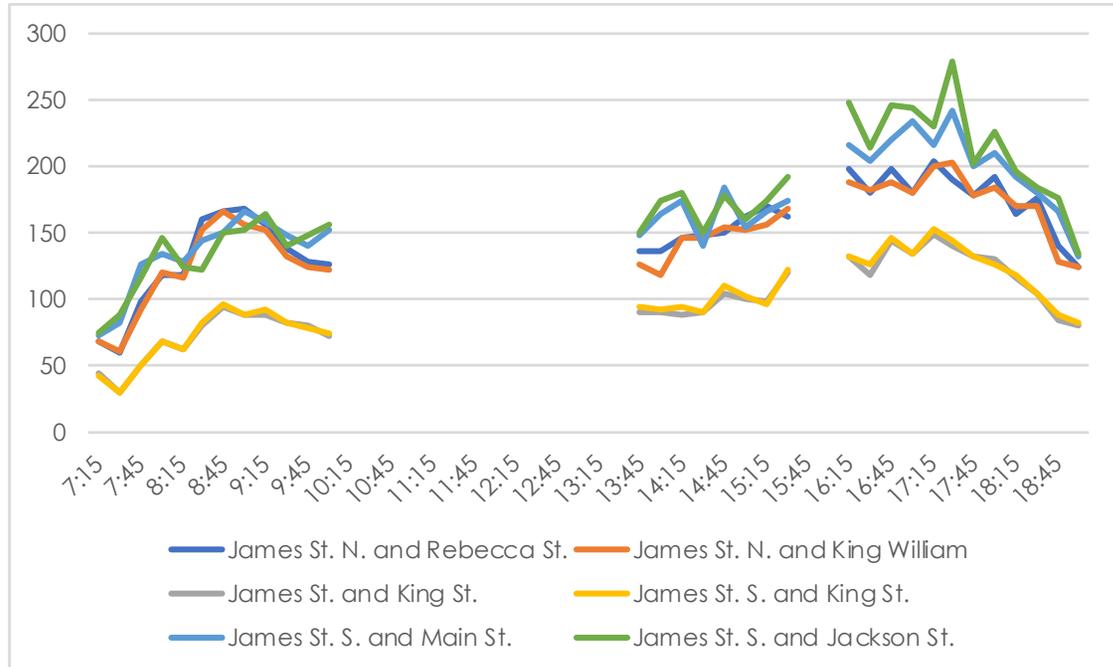


Source: City of Hamilton

Findings North Bound James St.

- Generally, the north bound traffic follows a similar projection throughout the day in terms of peaks and valleys.
- There is a commuter flow to the traffic whereby in the morning the flow north bound is higher for south of King St. intersections compared to those to the north.
- The reverse is true for the afternoon and evening commute.

Vehicular Traffic Patterns on James St. Southbound in Downtown Hamilton BIA



Source: City of Hamilton

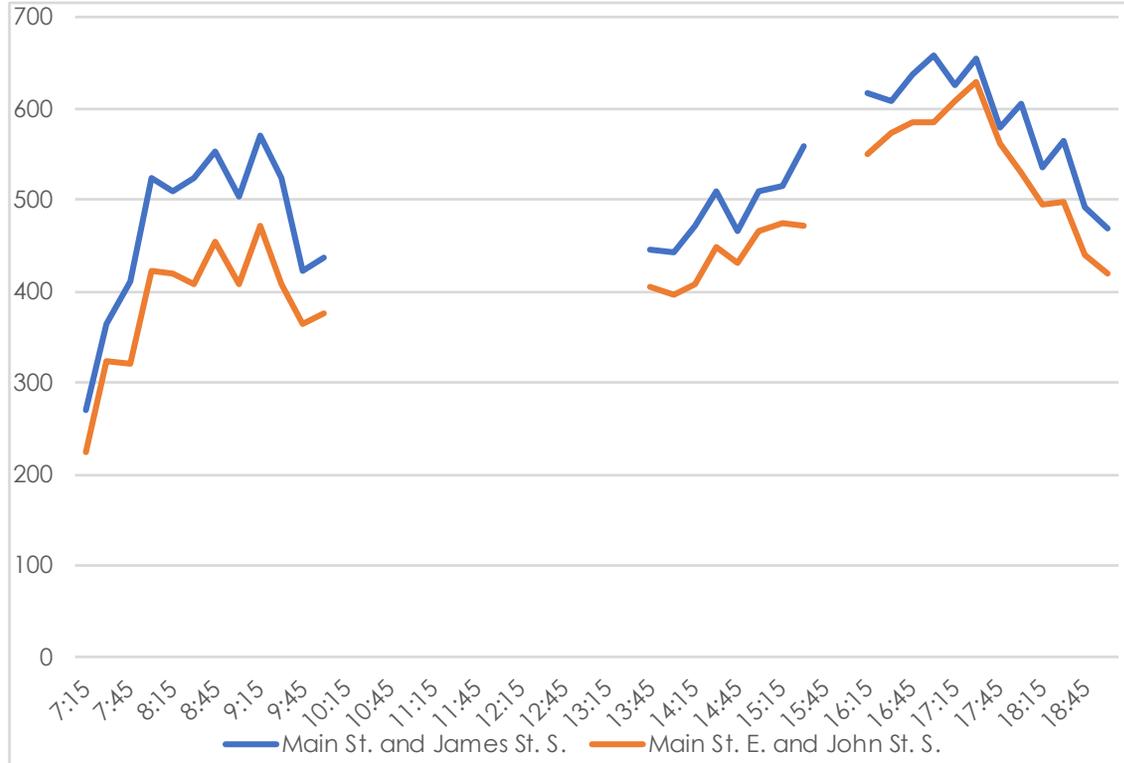
Findings James St. South Bound

- Vehicular traffic throughout the day is significantly higher southbound than it is northbound.
- The late afternoon and early evening commute south is significantly higher.
- (note that is a function of north bound mountain traffic is diverted to John St. S. and not James St. S.)
- South bound traffic builds to King St. then is diverted, then it builds again as it continues to move south towards Jackson St. and the Mountain.

Findings for James St.

- Traffic along James St. is affected by office worker vehicular patterns.
- Southbound traffic is higher than north bound traffic in part due to the direct south bound connection to the mountain.
- There is sustained traffic other times during the day creating a constant flow of traffic through the area.

Vehicular Traffic Patterns on Main St. E. Eastbound Traffic in Downtown Hamilton BIA

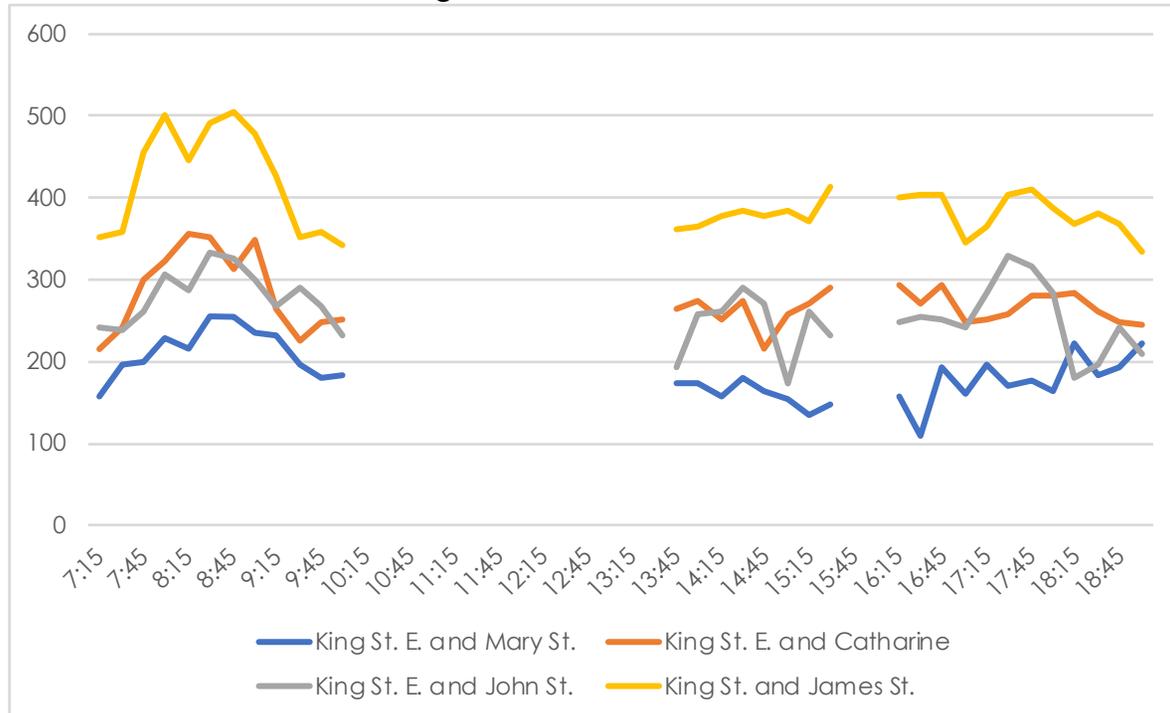


Source: City of Hamilton

Findings Main St. Eastbound Traffic

- Traffic volumes are higher at Main St. and James St. than at Main St. and John St.
- Traffic volumes are very high.
- The afternoon and early evening peak is higher than the morning peak.
- There is sustained high volume of traffic throughout the day.
- Traffic volume does fall off significantly after 7:00 pm.

Vehicular Traffic Patterns on King St. E. Eastbound Traffic in Downtown Hamilton BIA



Source: City of Hamilton

Findings King St. Westbound Traffic

- Traffic along King St. builds westward as it gets closer to James St.
- There is a morning commute peak.
- Traffic throughout the day is sustained.
- There is no significant drop off in traffic after 6:00 pm.

Implications for Downtown Hamilton BIA

- The road networks in and out of Downtown are still vitally important for office worker commutes. The limited number of access points ensures these will be stress points at certain times of the day.
- There is sustained traffic throughout the day indicating that there is a need to travel in and through Downtown beyond work commuting patterns.
- While King St. handles less vehicular volume than Main St., the traffic pattern is more of a constant sustained flow and less subject to the commuter peaks and valleys.
- Programs to extend the office workers stay in Downtown through happy hour type programs may ease some of the congestion issues.



2.2 On-Street Parking

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

On-Street Parking Meter Revenue

Year	Number of On-Street Meters	Total Parking Revenue	Revenue Per Meter
2012	\$163,258.81	164	\$995
2013	\$135,684.25	146	\$929
2014	\$134,225.54	133	\$1,009
2015	\$134,544.88	133	\$1,012
2016	\$129,699.52	134	\$968

Source: City of Hamilton

Note: June 2017 the price per hour increased from \$1.00 to \$1.50.

Findings

- There is free parking on Saturdays and Sundays.
- Parking revenue per meter can be used as a proxy for visitation.
- Parking revenue per meter has stayed approximately the same.
- There is relatively high usage of on-street parking meters throughout Downtown Hamilton BIA.
- The number of meters has declined by 30 from 2012 to 2016.

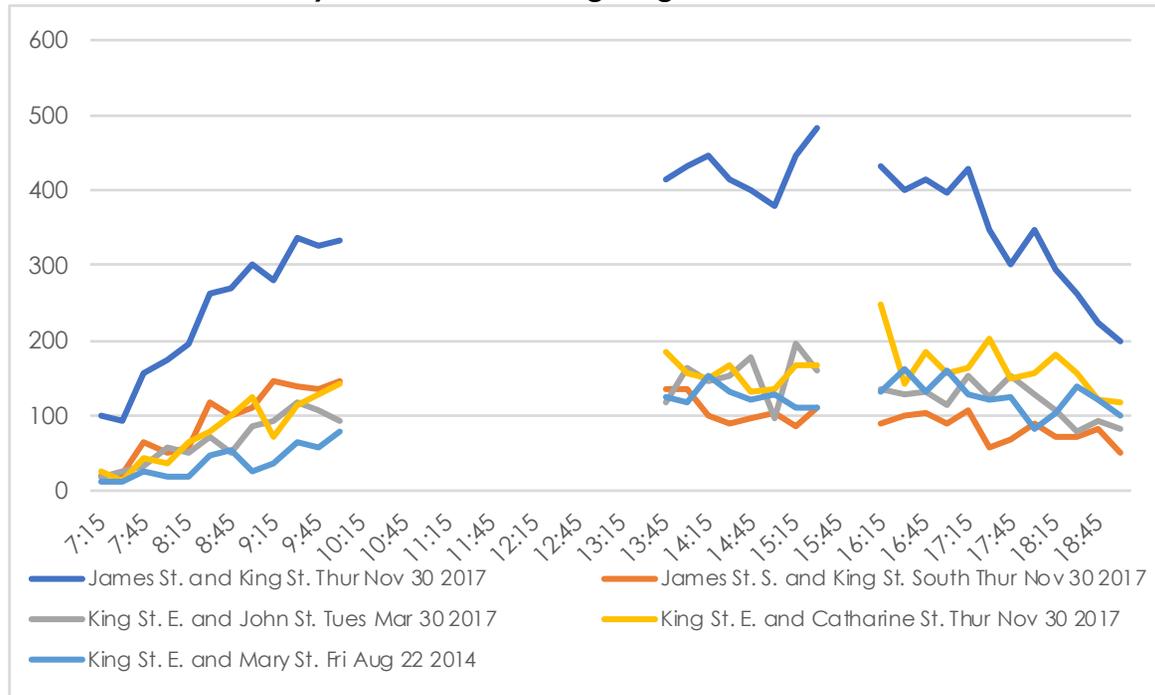
Implications for Downtown Hamilton BIA

- Downtown Hamilton businesses including both retailers and commercial offices rely on on-street parking.
- The usage of on-street meters has been constant and well used throughout the day.
- According to the City of Hamilton, mobile payment for parking and credit card payment at off-street lots should be able to be rolled out in 2018/2019. BIAs should look for increased education and marketing of these services in relation to their customers and visitation. Further advances include on-line payment for permit parking spaces.

2.3 Pedestrian Traffic

Pedestrian volumes in Downtown Hamilton can be very high.

Pedestrian Traffic at Key Intersections along King St. E. in Downtown Hamilton – 15 Minute Intervals

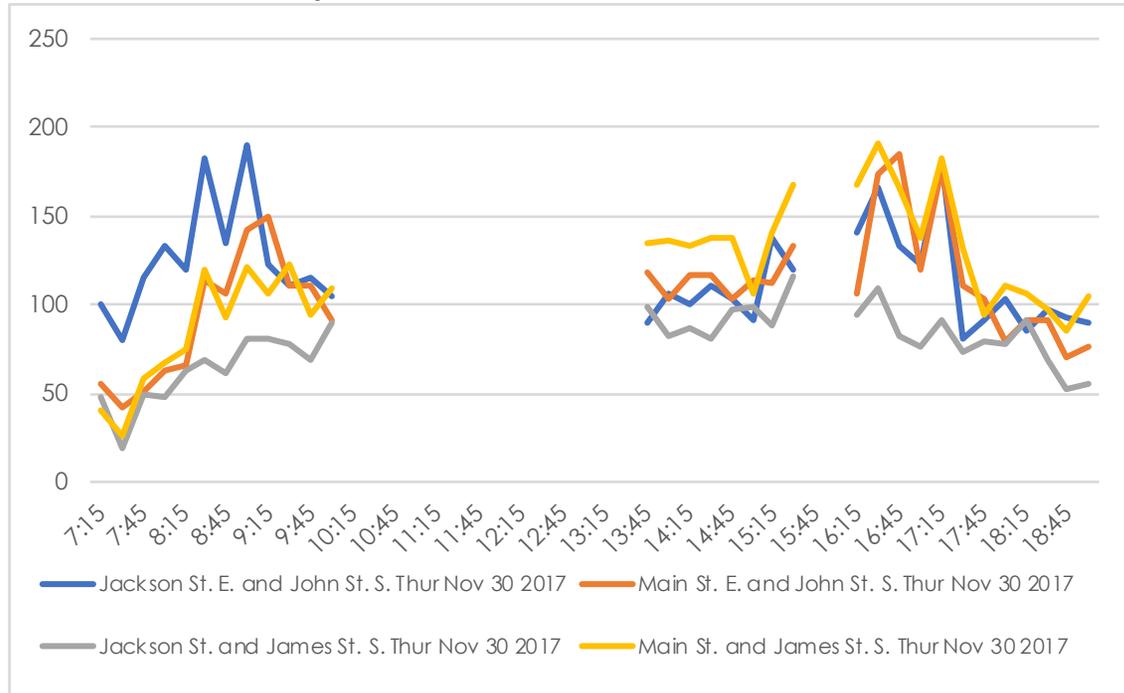


Findings King St. Pedestrian Movement

- King St. and James St. have significantly higher pedestrian volumes compared to elsewhere on King St. E.
- Traffic is sustained throughout the day.
- While there is a bump in traffic in the early evening at King St and James St., the other streets have sustained pedestrian traffic into the early evening.

Source: City of Hamilton

Pedestrian Traffic at Key Intersections in South Downtown Hamilton – 15 Minute Intervals

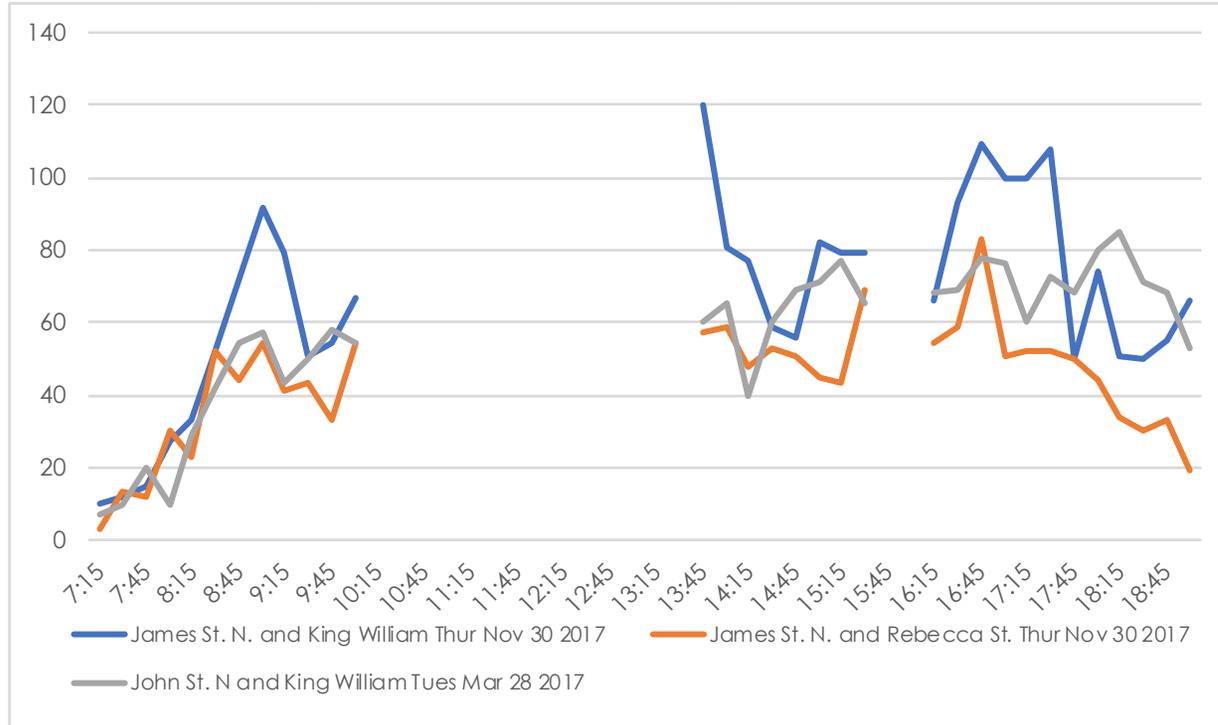


Source: City of Hamilton

Findings South Downtown Hamilton BIA Pedestrian Traffic Movement

- There are defined commuter-based peaks and valleys to the pedestrian movement.
- Pedestrian traffic does fall off in the early evening but there is a maintained flow of pedestrian traffic into the evening.

Pedestrian Traffic at Key Intersections in North of King St. in Downtown Hamilton BIA – 15 Minute Intervals

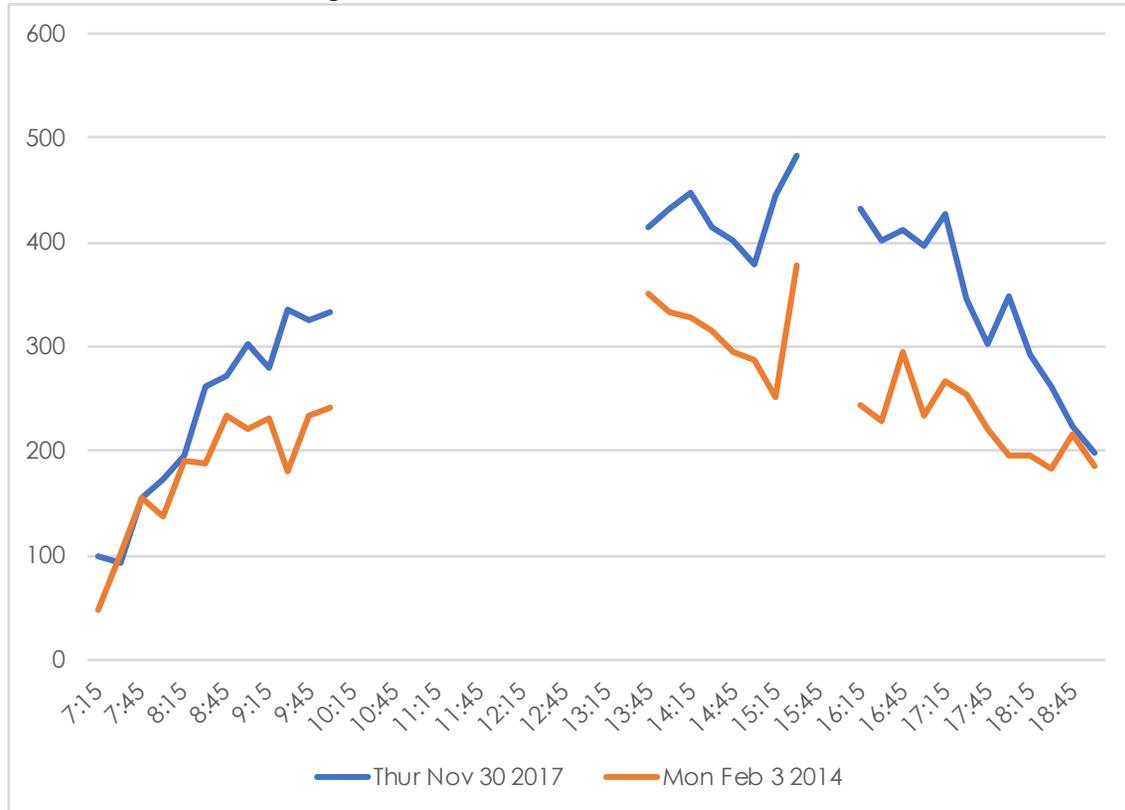


Findings North Downtown Hamilton BIA Pedestrian Traffic

- Pedestrian traffic is significantly lighter compared to elsewhere in the Downtown.
- There is a commuter-based traffic pattern for morning and late afternoon/ early evening commuters.
- The lunch period pedestrian traffic is very high.
- There is sustained pedestrian traffic in the early evening.
- Both of these are related to the food service cluster nearby.

Source: City of Hamilton

Downtown Hamilton King St. and James St. Pedestrian Counts – 15 Minute Intervals 2014 to 2017



Findings Change in Pedestrian Volumes at King St. and James St.

- From 2014 to 2017, pedestrian traffic at King St. and James St. has increased significantly.
- The increase is felt throughout the day but is most significant from 1:00 pm to 5:00 pm particularly at 4:00 pm.
- There is a noticeable bump on early evening pedestrian traffic just by 6:00 pm.
- By 7:00 pm traffic returns to it 2014 levels.

Source: City of Hamilton

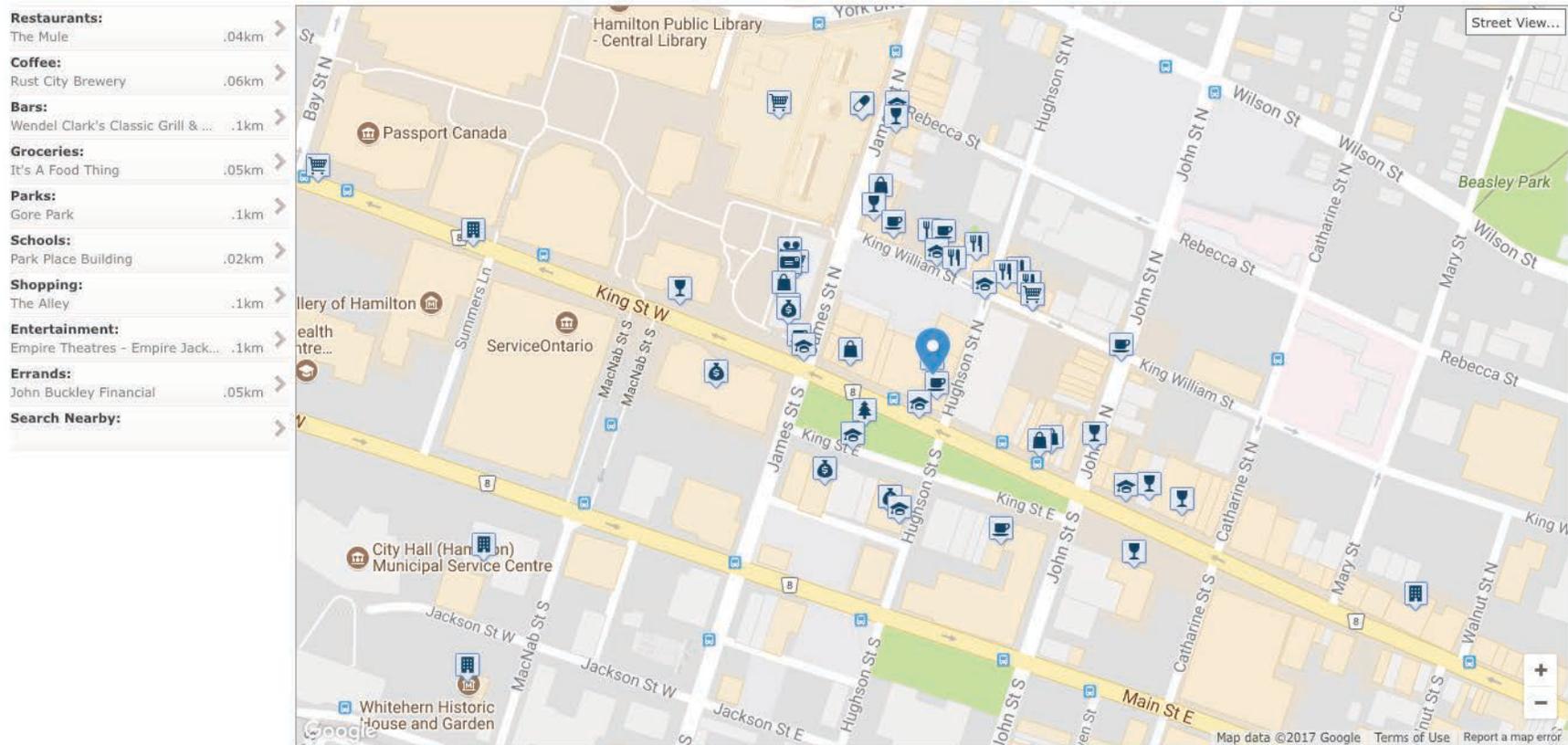


Findings

- Commuter based pedestrian traffic contributes to spikes (peaks) in pedestrian traffic.
- Other times, many streets have good sustained pedestrian traffic throughout the day.
- Clusters of food services contribute to both lunch time and early evening pedestrian traffic.
- King St. and James St. has four times the pedestrian volume as many other intersections.
- Pedestrian traffic has increased significantly in the short time period from 2014 to 2017.
- The south Downtown Hamilton BIA area has higher pedestrian volumes compared to the north Downtown Hamilton BIA area.

Downtown Hamilton BIA Walk Score – Nearby Amenities

What's Nearby



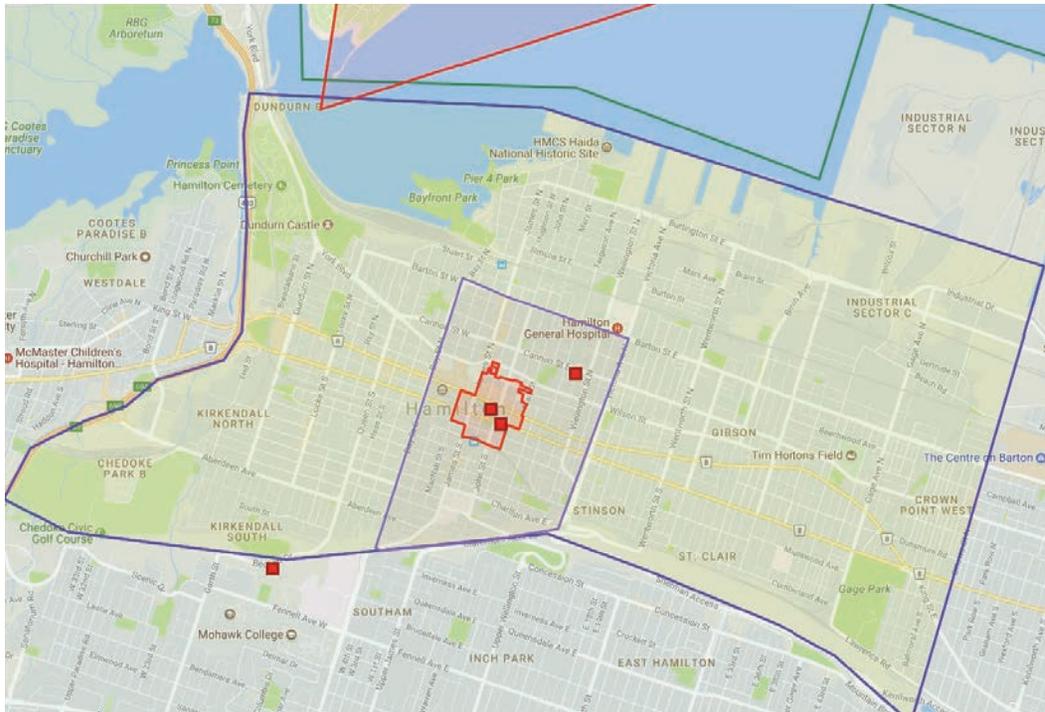
Implications for Downtown Hamilton BIA

- Downtown Hamilton BIA achieves a walk score of 100 and a transit score of 86. This was the same for other addresses throughout the BIA.
- The walking proximity to libraries, farmers' markets, arena, shopping, education, grocery stores, parks, recreation areas, all contribute to the high scores.
- The walkability is part of the downtown livability attraction which will fuel continued retail and commercial development.

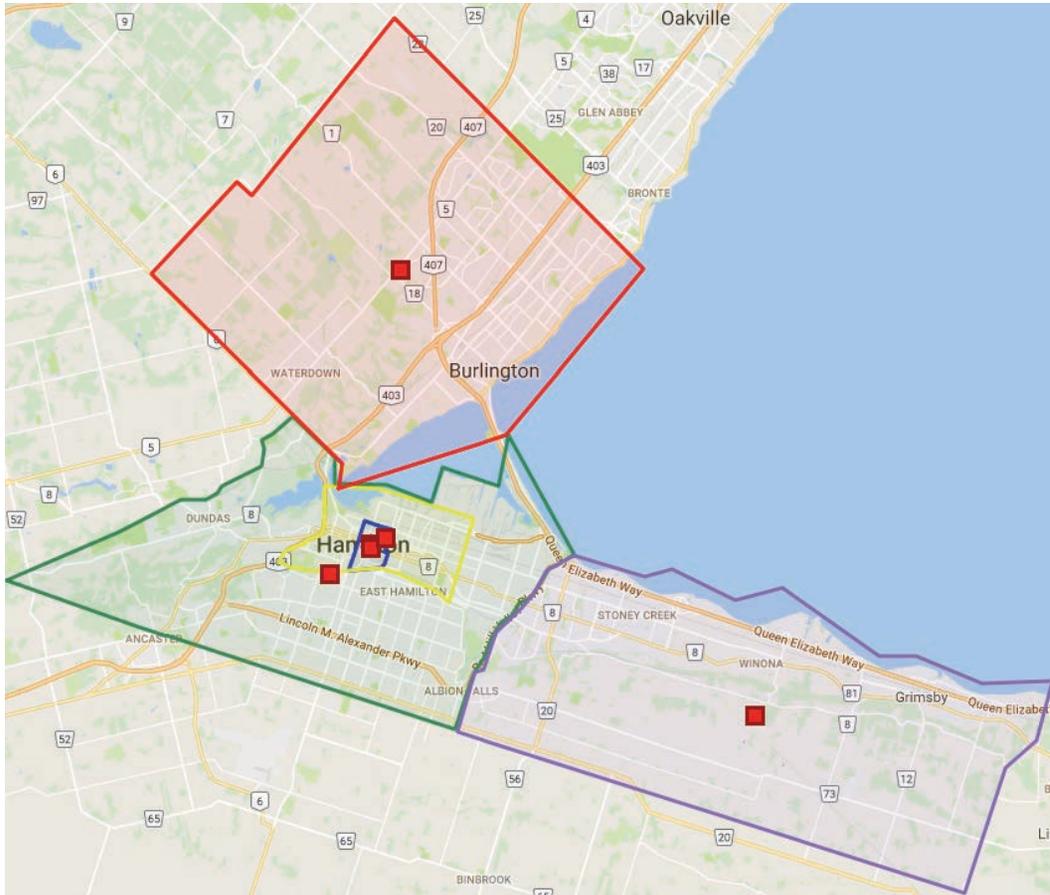
3.0 Trade Area Analysis

The trade areas for Downtown Hamilton BIA were established in the previous Commercial Market Assessment reports. They focused on the immediate area which was the built-up areas of Hamilton. The regional visitation was based on the surrounding urban and rural areas.

Downtown Hamilton BIA Trade Areas – Zoomed Out



Downtown Hamilton BIA Trade Areas – Zoomed Out





Trade areas include:

- Immediate: four neighbourhoods of Central. Durand, Beasley, and Corktown (10 minute walking distance)
- West Lower City: Hamilton Harbour to the escarpment and Hwy 403 to Ottawa St.
- Secondary Trade Area: Hamilton Mountain, Dundas, Ancaster, and East Hamilton to the Red Hill Parkway
- Stoney Creek/East: Stoney Creek, Winona, Grimsby
- Waterdown/Burlington
- City of Hamilton

Population, Households, and Daytime Workers

	Down- town Hamilton BIA	Immed- iate Trade Area	West Lower City	Secon- dary Trade Area	Stoney Creek / East	Wate- rdown / Burlinto n	City of Hamilton
2011 Population	1,082	29,737	91,430	349,699	127,622	193,432	519,950
2017 Est. Population	1,651	30,512	97,416	361,349	136,998	220,832	566,276
Annualized Population Growth Rate	8.8%	0.5%	1.3%	0.7%	1.4%	2.7%	1.7%
2017 Est. Households	1,031	19,070	45,946	152,942	52,305	83,004	229,822
Annualized Household Growth Rate	0.2%	0.4%	0.6%	0.8%	1.2%	1.4%	0.9%
Daytime Worker Population	5,337	37,656	84,495	156,281	59,051	111,633	228,040

Source: Statistics Canada 2016

Findings

- Within the BIA, there is a very high growth rate.
- Within the Immediate Trade Area, there is a population gain as new condo units have recently been completed.
- There are approximately 30,000 residents in the Immediate Trade Area. This is a significant population base to support local everyday shopping.
- There are a significant number of residential units under construction and being proposed in the BIA and nearby.
- The population growth rate is higher than the household growth rate. This suggests that families are moving into the Downtown area and staying.
- Outside of the West Lower City, the other trade areas are growing at a faster pace.
- There is a sizeable workforce for businesses' to draw upon to support retail sales activity.



LRT Station Population Profile

There are two proposed LRT stations in Downtown Hamilton BIA.

5 and 10 Minute Walk Time from LRT Stations

LRT Stations	400 m (5 Minute Walk Time)	800 m (10 Minute Walk Time)
King St. and James St.	637	16,040
King St. E. and Mary St.	2,876	14,909

Source: Statistics Canada 2016

Findings LRT Station Population Profile

- Within a 10 minute walking distance of each proposed station, there is a high density of location population.
- Closer to the stations, the population density is lower.
- King St. and James St. benefits from being able to access over 20,000 workers immediately in the Downtown.
- However, pushing population growth to 6,000 to 7,000 people within the 5 minute walking distance is ideal.



Age Profile, Gender, and Ethnicity

	Downtown Hamilton BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
Age Profile							
0 to 9	6%	7%	10%	10%	11%	11%	10%
10 to 19	5%	6%	9%	11%	12%	12%	11%
20 to 29	27%	23%	18%	14%	12%	11%	14%
30 to 39	19%	17%	16%	13%	12%	13%	12%
40 to 49	10%	11%	12%	13%	13%	14%	15%
50 to 59	11%	14%	15%	16%	15%	15%	14%
60 to 69	8%	11%	11%	11%	13%	11%	10%
70+	17%	11%	9%	12%	12%	13%	12%
Median Age	36.9	38.3	38.6	41.6	42.5	42.7	41.6
Gender							
Male	54%	51%	50%	49%	49%	48%	49%
Female	46%	49%	50%	51%	51%	52%	51%
Ethnicity							
Visible Minority	46%	33%	24%	21%	16%	15%	19%
1st Generation Canadian	47%	37%	28%	27%	24%	26%	26%
2nd Generation Canadian	17%	22%	23%	25%	26%	25%	25%
3rd Generation Canadian +	36%	41%	50%	49%	50%	49%	49%

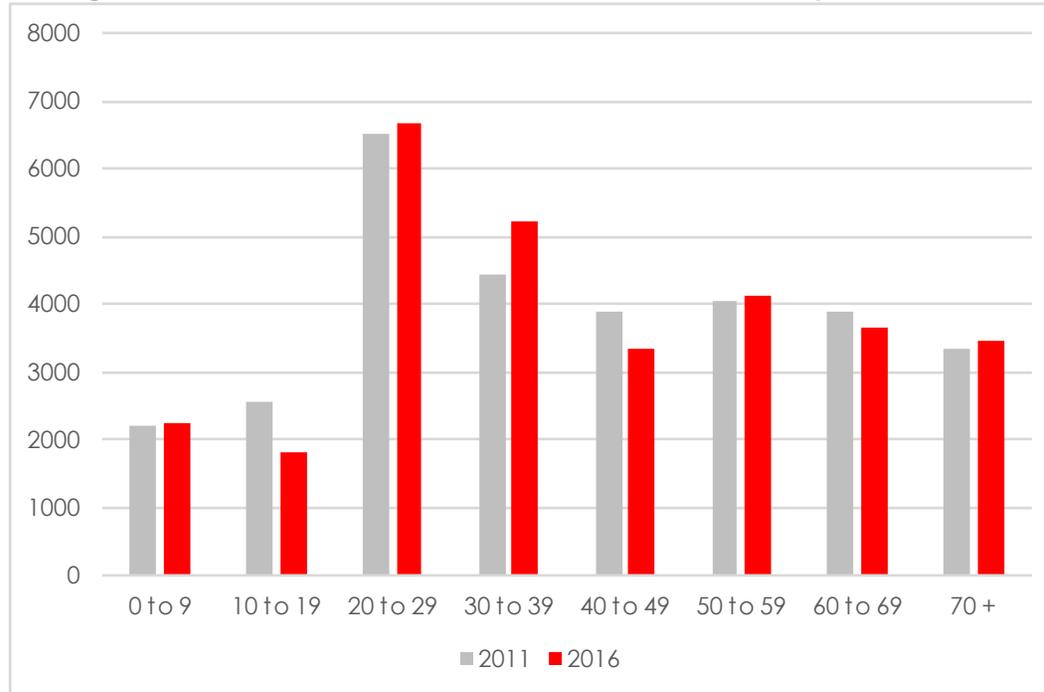
Source: Statistics Canada 2016

Findings

- The Downtown Hamilton BIA is predominantly young adults from 20 to 39 years of age. They account for 46% of the BIA residential population (just under half). There is a sizeable senior population as well.
- There is a growing children population albeit it is less than elsewhere it is growing as young families age in place.
- In the Immediate Trade Area, young adults are still the dominant age group. They account for approximately 40% of the population. There is a small but growing population of children. The senior population accounts for a smaller proportion.
- The BIA has a higher proportion of males.

- The Downtown is becoming increasingly multicultural. The Immediate Trade Area has 33% of the residents as visible minorities. In addition, 37% of residents are first generation Canadians.

Change in Downtown Hamilton Immediate Trade Area Population – 2011 to 2016



Source: Statistics Canada 2011 2016

Findings

- The total population has increased as the area continues to transition and transform.
- Residents aged 20 to 29 years of age are the dominant age group in the Immediate Trade Area.
- The number of young adults has increased from 2011.
- The senior population remains a significant component of the Downtown including a number of seniors' homes.
- The number of children has increased slightly as families settle and age in place.



Household Size and Marital Status

	Downtown Hamilton BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
Household Size							
1 Person	58%	58%	46%	32%	23%	24%	28%
2 Person	31%	27%	29%	32%	33%	34%	32%
3 Person	6%	8%	12%	15%	17%	17%	16%
4 + Person	7%	7%	13%	21%	27%	26%	24%
Person Per Household	1.6	1.7	2.0	2.4	2.6	2.6	2.5
Marital Status							
Single	41%	41%	38%	31%	25%	24%	29%
Married, Common Law	33%	37%	42%	51%	60%	61%	55%
Separated, Divorced, Widowed	26%	22%	20%	18%	15%	15%	16%

Source: Statistics Canada 2016

Findings

- There is a high proportion of single person households in Downtown Hamilton in the BIA and in the Immediate Trade Area. The average person per household is a low 1.6 to 1.7.
- There are a higher proportion of singles as well as residents who are separated, divorced, or widowed. However, the number of married and common law residents is increasing.



Education, Occupation, and Home Ownership

	Downtown Hamilton BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
Education							
Less than High School	13%	19%	24%	21%	20%	12%	20%
High School Graduate	27%	27%	27%	28%	29%	26%	28%
College, Diploma	25%	26%	26%	28%	31%	29%	30%
University Graduate	35%	28%	23%	23%	20%	33%	22%
Occupation							
Management	24%	20%	19%	22%	26%	32%	24%
Science	6%	6%	5%	5%	5%	8%	6%
Health	9%	9%	8%	8%	7%	6%	8%
Govt, Ed., Social Services	17%	13%	12%	12%	11%	13%	12%
Arts, Culture, Recreation	4%	4%	4%	3%	2%	3%	3%
Sales and Service	25%	28%	26%	25%	23%	23%	24%
Other	13%	16%	23%	21%	25%	13%	23%
Labour Force Participation	61%	60%	61%	62%	64%	69%	64%
Housing Tenure							
Own	20%	20%	37%	62%	75%	77%	68%
Rent	80%	80%	63%	38%	25%	23%	32%

Source: Statistics Canada 2016

Findings

- Downtown Hamilton BIA and Immediate Trade Area residents are well educated. There are number of single persons including post-secondary students and young professionals living in the Downtown area.
- There is a diverse range of occupations associated with the Immediate Trade Area residents. This includes professionals in business, administration, science, and government. There are other public sector employees in health and education. There is a higher proportion in sales and service as well.
- Labour force participation rate is lower than elsewhere but it has been increasing over time. The statistic does include a high proportion of students and seniors.



Travel to Work

	Downtown Hamilton BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
Travel to Work							
Vehicle - Driver or Passenger	44%	53%	62%	79%	91%	87%	83%
Public Transit	29%	26%	22%	14%	5%	9%	10%
Walk	23%	19%	13%	6%	3%	3%	5%
Bike	2%	2%	3%	1%	0%	1%	1%
Other	1%	1%	1%	1%	1%	1%	1%

Source: Statistics Canada 2016

Findings

- 53% of residents in the Immediate Trade Area use a vehicle to get to work. Public transit and walking are relied upon for residents to conduct their daily lives. Clearly, residents want to live near their workplace as the proportion of residents who walk to work in the BIA and in the Immediate Trade Area is high.



Household Income

	Downtown Hamilton BIA	Immed- iate Trade Area	West Lower City	Sec- ondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
Household Income							
< \$20,000	27%	30%	24%	13%	11%	5%	9%
\$20,000 to \$39,999	24%	28%	25%	20%	15%	12%	17%
\$40,000 to \$59,999	16%	18%	18%	17%	16%	12%	16%
\$60,000 to \$79,999	15%	12%	12%	13%	14%	12%	13%
\$80,000 to \$99,999	7%	6%	8%	14%	12%	12%	11%
\$100,000 to \$149,999	7%	6%	9%	15%	21%	21%	18%
\$150,000 to \$200,000	2%	2%	3%	7%	10%	12%	8%
\$200,000 +	2%	2%	2%	5%	6%	13%	6%
Average Household Income	\$49,442	\$48,076	\$55,273	\$79,754	\$93,780	\$119,917	\$88,151
Real Annualized Growth in Household Income	0.8%	0.7%	0.9%	0.8%	0.8%	0.7%	1.0%

Source: Statistics Canada 2016

Findings

- Average household income is below \$50,000 in the BIA and the Immediate Trade Area. However, 10% earn more than \$100,000 in the Immediate Trade Area.
- There has been positive movement in real household incomes in the Downtown area (excluding inflation adjustments).



3.1 New Residential Developments

The follow three charts illustrate recently completed, under construction, and proposed housing units.

Recently Completed Housing Units

Development	Address	Number of Units	Status
275 King	275 King St. W.	29	2013
Witton Lofts	50 Murray St. W.	36	2013
Corktown	147 Walnut St.	7	2014
149 Main	149 Main St. W.	73	
150 Main	150 Main St. W.	142	2016
Bella	140 Main St. W.	322	2016
Tiffany Square	271 Bay St. N.	164	2016
Beasley	134 Mary St.	65	2016
Total Recently Completed		838	



Pre-Construction and Under Construction Housing Units

Development	Address	Number of Units	Status
15 Queen	15 Queen St. S.	176	TBD
101 Locke	101 Locke	80	2017
Van Kleeef	467 Charlton St.	162	2017
220 Cannon	220 Cannon St.	100	2017
Royal Connaught	112 King St. E.	700	2017
Essex	366 Bay St. N.	6	2017
Templar Flats	33 King William	25	2017
220 Dundurn	220 Dundurn St. S.	194	2017
William Thomas	46-52 James St. N.	146	2017
Tivoli	108 James St. N	106	2018
Connolly	98 James St. S.	259	TBD
Acclamation Lofts	179 James St. N.	71	2018
Pasadena	27 Bold St.	32	2018
20 George	20 George St.	230	2018
Gibson School Lofts	601 Barton St. E.	80	TBD
Total Under Construction		2,367	



Proposed Housing Units

Development	Address	Number of Units
LIUNA Residences	46 James St. N.	159
	500 James St. N.	45
	198 Wellington St. S.	28
City Square, Robinson Phase 3	90 Charlton Ave. W.	105
	206 King St. W.	120
	154 Main St. E.	267
	71 Rebecca St.	371
	188 Cannon St. E.	
	143 Main St. E.	4
Television City	163 Jackson St. W.	618
King Stuart	41 Stuart St.	77
Melrose	212 King William St.	108
LIUNA	43-51 King St. E.	655
(Former Days Inn)	210 Main St. E.	224
Cathedral Place	252 James St. N	98
Total Proposed		2,879

Note:

Three Sixty Collective, the City of Hamilton, and Downtown Hamilton BIA make no warranties on this information. It is based on the most recent information sources as of January 2018.

Findings New Residential Development

- Within Downtown Hamilton BIA and nearby there are almost 5,000 housing units under construction and proposed. This is the equivalent to over 8,400 residents. This population level supports a complete range of neighbourhood goods and services including grocery stores, pharmacies, cafes, restaurants, as well as personal services and financial services.



3.2 Household Expenditure

Household Expenditure

	Downtown Hamilton BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stone Creek / East	Waterdown / Burlington	City of Hamilton
Local Serving Retail							
Food Purchased from Stores	\$4,740	\$4,526	\$5,429	\$7,493	\$8,929	\$9,720	\$8,231
Alcohol Purchased from Stores	\$672	\$433	\$477	\$547	\$564	\$803	\$583
Health Care Related Retail	\$2,136	\$1,822	\$1,909	\$2,520	\$2,923	\$3,354	\$2,737
Food Services							
Restaurant dinners	\$1,747	\$1,307	\$1,521	\$2,000	\$2,258	\$2,868	\$2,190
Restaurant lunches	\$906	\$685	\$733	\$981	\$1,126	\$1,404	\$1,080
Restaurant breakfasts	\$405	\$273	\$281	\$349	\$388	\$467	\$374
Restaurant snacks and beverages	\$590	\$415	\$479	\$567	\$608	\$732	\$600
Alcohol Serviced on Premises	\$1,050	\$787	\$1,021	\$1,344	\$1,474	\$1,862	\$1,447
Retail Merchandise							
Women's Clothing and Accessories	\$1,309	\$1,035	\$1,184	\$1,715	\$1,989	\$2,542	\$1,898
Men's Clothing and Accessories	\$785	\$643	\$735	\$1,011	\$1,145	\$1,406	\$1,109
Children's Clothing and Accessories	\$18	\$37	\$54	\$57	\$60	\$61	\$61
Clothing as Gifts	\$560	\$397	\$426	\$547	\$614	\$710	\$586
Home Furnishings	\$1,046	\$789	\$821	\$1,042	\$1,220	\$1,697	\$1,184
Appliances and Electronics	\$598	\$458	\$449	\$505	\$527	\$595	\$545
Leisure Retail (Sporting Good, Books, Music)	\$500	\$424	\$502	\$611	\$664	\$808	\$667
Pet Supplies	\$218	\$193	\$269	\$345	\$413	\$472	\$391
Florist, Nursery, Greenhouse Stock	\$114	\$91	\$136	\$221	\$284	\$341	\$258
Home Improvement Retail	\$43	\$49	\$84	\$153	\$226	\$249	\$195
Services							
Packaged Travel	\$277	\$153	\$160	\$298	\$395	\$492	\$368
Clothing - Laundromat, Dry Cleaning, Tailor	\$24	\$17	\$17	\$22	\$25	\$28	\$24



Recreation Memberships	\$196	\$145	\$157	\$253	\$278	\$377	\$289
Movies	\$69	\$50	\$55	\$57	\$54	\$61	\$60
Live Sporting Events	\$27	\$18	\$16	\$22	\$21	\$28	\$23
Live Performing Arts	\$62	\$44	\$44	\$74	\$98	\$105	\$89
Personal Care Services	\$542	\$398	\$426	\$625	\$758	\$971	\$705

Source: Statistics Canada, Environics Estimates 2017



Findings

Households in the Downtown area spend a higher proportion of their budget on (15 top ranked goods and services):

- Appliances and electronics
- Movies
- Live sporting events
- Alcohol purchased from stores
- Breakfast
- Snacks and beverages
- Clothing services – laundromat, dry cleaning, tailor
- Clothing as gifts
- Health related retail
- Home furnishings
- Leisure retail (sporting goods, books, music)
- Lunch
- Children's clothing and accessories
- Dinners
- Men's clothing and accessories

Implications for Downtown Hamilton BIA

- What would traditionally be classified as male oriented goods – electronics for the home, video games, live sporting events, sporting goods, movies, breakfast, snacks, lunch, dinner, alcohol from stores, as well as men's clothing and accessories. This is suited to the higher male population in Downtown as well as the high proportion of students and young professionals.
- The new young families are just at the early family formation stages and there are young children goods and services opportunities.
- There is a sense that households need to outfit their home with higher proportionate spending on home furnishings, home electronics, alcohol purchased from stores.



3.3 Other Major Target Markets and Customer Visitation

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

- Office workers banks, financial institutions, public works, government services, post-secondary institutions, etc.

Nearby there are:

- Hotels and accommodation
- Convention Centre
- Arena
- Theatre and performing arts
- Museums and art galleries
- Students and health care

Key Findings

- Employment as measured within the Downtown Hamilton BIA boundary includes a mix of retail-oriented employment and office, institutional, and entertainment/recreation employment. There were 6,030 employees in 2016.
- Overall, employment had decreased by 2013. For 2015 and 2016 employment has remained relatively stable.
- According to Statistics Canada and Environics estimates, there are approximately 25,555 workers in the Downtown Hamilton BIA Primary Trade Area there are 25,566 workers (Source: Statistics Canada, Environics Estimates).
- Retail based employment has remained relatively stable with modest shifts up and down over the past five years.
- Office employment has remained stable. Institutional employment has fallen.



Downtown Hamilton BIA Employment

Employment Sector	2012	2013	2014	2015	2016
Office	4,841	4,350	4,810	4,643	4,680
Shopping, Services, Repairs, Servicing and Rentals	716	700	662	731	700
Institutional	735	795	602	472	430
Other	87	91	346	237	220
Total	6,379	5,936	6,420	6,083	6,030

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

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

Implications for Downtown Hamilton BIA

- Overall the Downtown Hamilton employment sector is stable and healthy. There are internal shifts within the BIA employment as one building opens or another is closed for redevelopment. The construction boom has been a contributing factor to this change as buildings are redeveloped.
- There are more people working from home (in the Other category).



Daytime Workers

There are an estimated 25,932 daytime workers in Downtown Hamilton according to the City of Hamilton. This represents an increase of over 1,000 workers from 2015 to 2016. Daytime workers are in Downtown generally from Monday to Friday and from 9:00 am to 5:00 pm. They include office workers as well as retail and hospitality workers, health care workers, education workers, etc.

According to other recent statistics:

- Downtown accounts for approximately 10% of all Hamilton jobs
- Over one-quarter are in Public Administration followed by Finance and Insurance and Professional Scientific and Technical Services
- 31% of Downtown workers have been to University
- 25% earn more than \$60,000 annually
- Vehicular usage to commute to Downtown accounts for 75% of workers.

Workers tend to spend at least \$1,500 annually on breakfast, lunch, and snacks during the day. For some workers, it can be as high as \$2,300 annually (based on previous work 360 Collective has done for other Downtowns and worker environments).

In terms of the top five attributes Downtown workers look for in food selection are:

- Quality of food
- Cheap price, good value
- Proximity
- Healthy options
- Selection

Hamilton Bulldogs

First Ontario Centre is home to 34 hockey games. In the past, average attendance per game is 5,342. Total attendance was just over 180,000 annually (note excludes any post season playoff games). The franchise is now a major junior team playing in the Ontario Hockey League.

Average expenditure on food and drink either before or after a game is \$12 per person. (based on previous work conducted by 360 Collective on arena food service expenditure). This is equivalent to \$2.2 million in total revenue. King St. W. could capture 5% to 10% of these sales accounting for \$108,000 to \$218,000 in potential restaurant sales.



First Ontario Centre – Concerts and Events

There are an estimated 10 additional big events at First Ontario Centre including concerts, events, monster truck rallies, etc. Total capacity of the venue is 17,000 to 19,000 depending on configuration. Total attendance is estimated to be 170,000.

Average expenditure on food and drink either before or after the event is \$17 per person. This is equivalent to \$2.89 million in total revenue.

Hamilton Place

There are approximately 30 events at Hamilton Place.

Art Gallery of Hamilton

The art gallery attracts approximately 244,195 visitors annually (source Art Gallery of Hamilton 2015).

The visitor profile includes:

- 46% Local
- 25% Ontario
- 12% Other parts of Canada
- 5% International visitors

Per person expenditure is usually limited to \$2 to \$4 on food service type expenditures. This is equivalent to \$488,390 to \$976,780 in potential food service sales.

Students

David Braley Health Services Centre has:

- 560 staff
- Over 4,000 students will use the centre
- 54,000 medical clinic visits



Hotels – Overnight Accommodation

There are four major hotels in close proximity to King St. W.:

- Hamilton Plaza 214 rooms
- Homewood Suites 200 rooms
- Staybridge Suites 129 rooms
- Sheraton 299 rooms
- Arrival Inn 74 rooms

Expenditure potential is based on:

- Rooms: 916
- Occupancy: 65.7% (Source: City of Hamilton Tourism and Culture Division)
- Average overnight visitor expenditure per trip on food services: \$91.84
- Average length of stay: 2.5 nights
- Average person per room: 1.6 people per room
- \$12.9 million in potential food service sales

Implications for Downtown Hamilton BIA

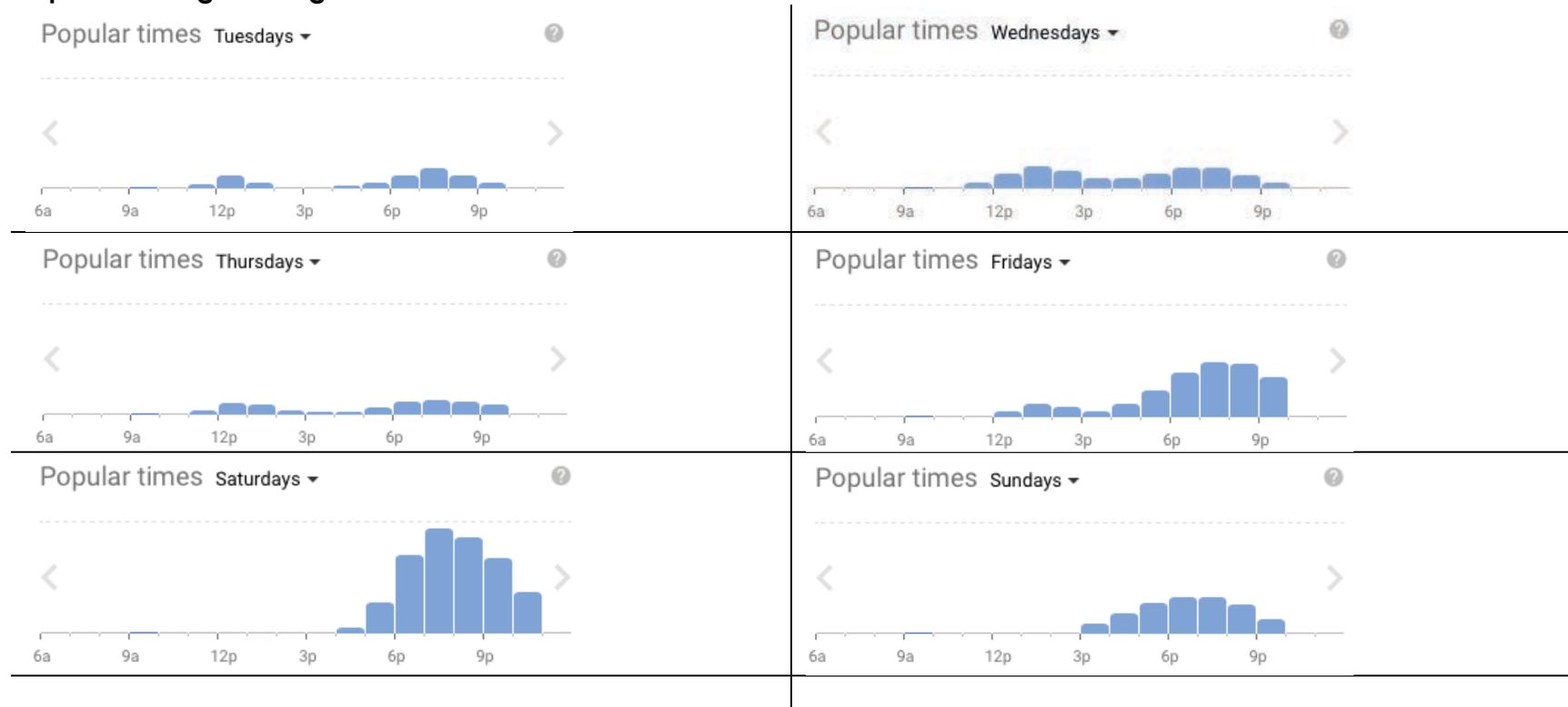
- Businesses in the BIA need to be flexible enough and nimble in their marketing and merchandising to adjust and respond to these target markets.
- A common thread amongst all the target markets is food services – fast, fresh, good quality, and good value

3.4 Customer Visitation Data

Customer Flow Times

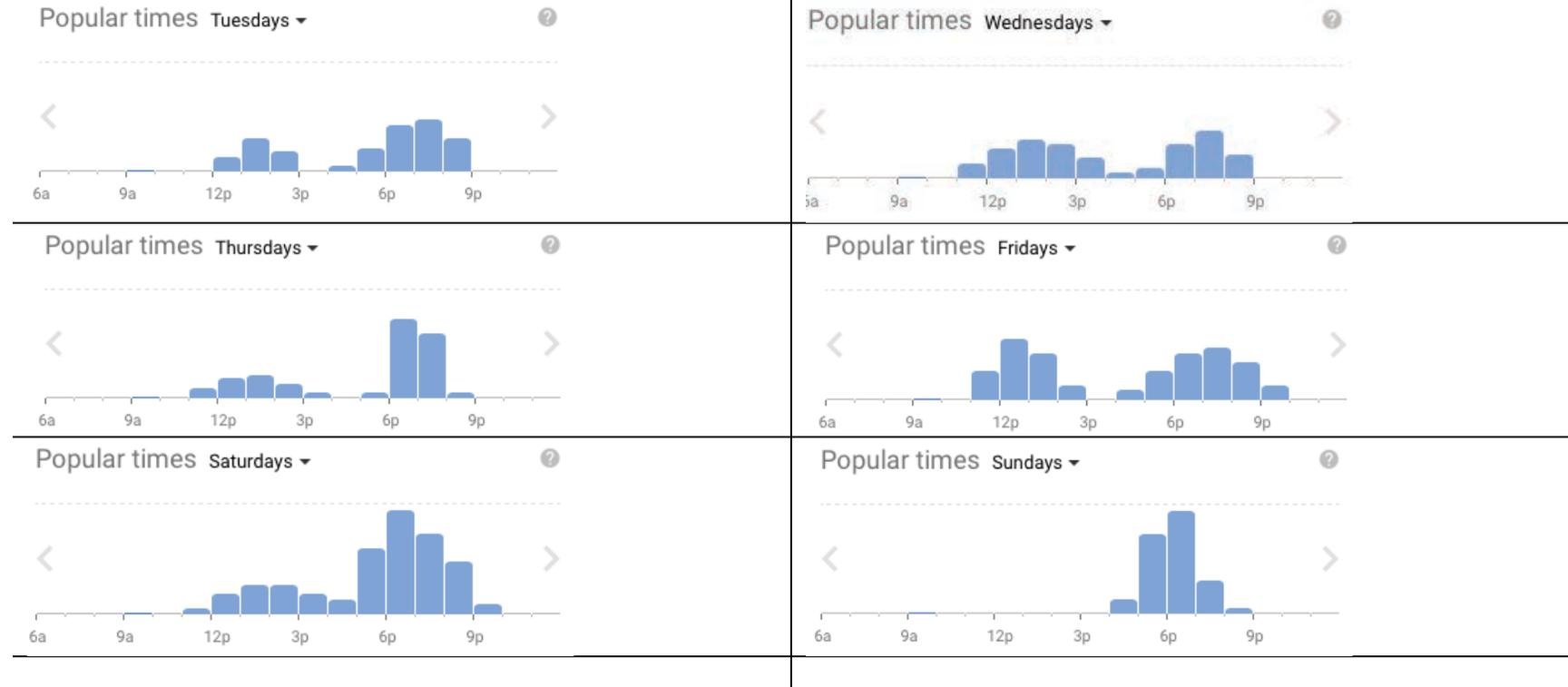
The following graphs illustrate customer visitation at select Downtown Hamilton BIA businesses.

Capri: 3.4 Google Rating

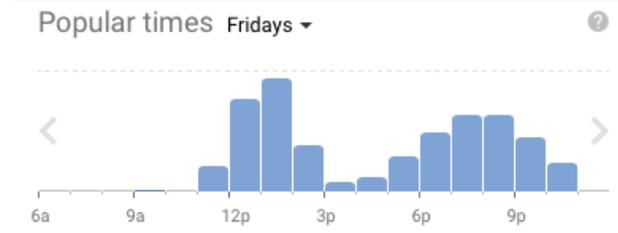
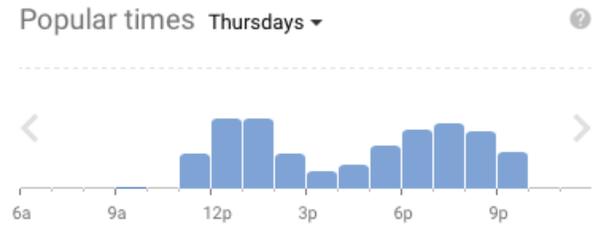
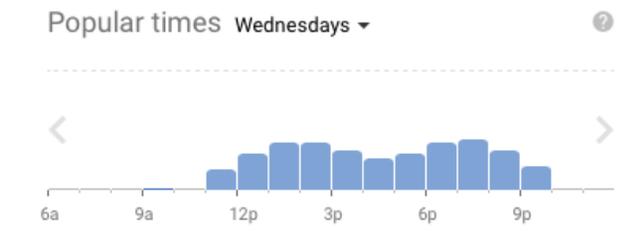
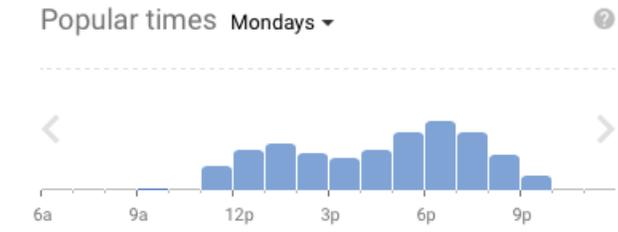




My Thai: 3.8 Google Rating



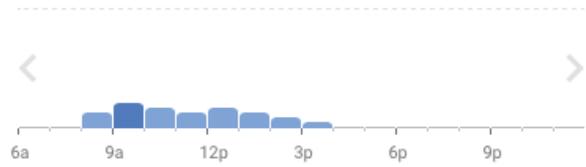
Greek Palace: 4.6 Google Rating





John St. Diner: 4.4 Google Rating

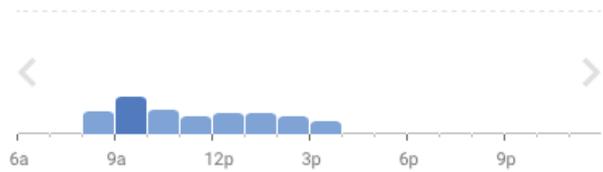
Popular times Mondays ?



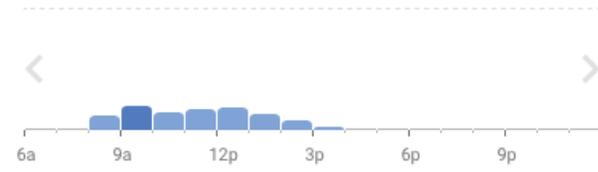
Popular times Tuesdays ?



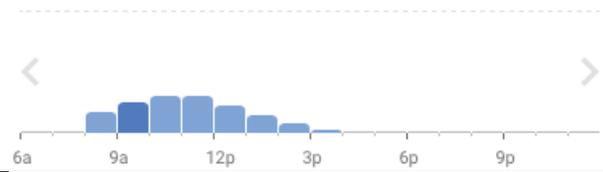
Popular times Wednesdays ?



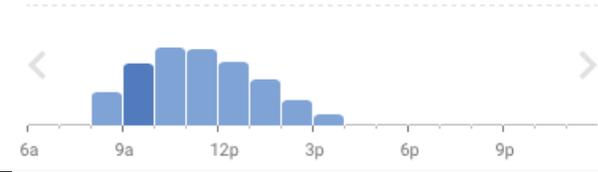
Popular times Thursdays ?



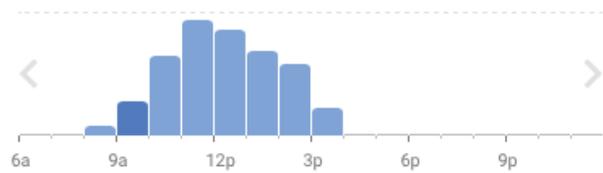
Popular times Fridays ?



Popular times Saturdays ?



Popular times Sundays ?



Sugar Marmalade: 3.4 Google Rating

Popular times Mondays ?



Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



Popular times Sundays ?





Red Church Café: 4.7 Google Rating

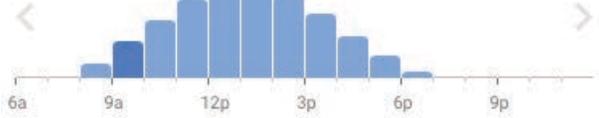
Popular times Mondays ?



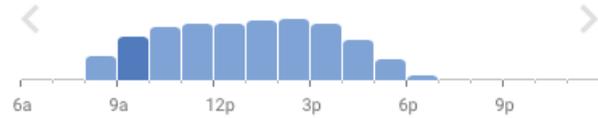
Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



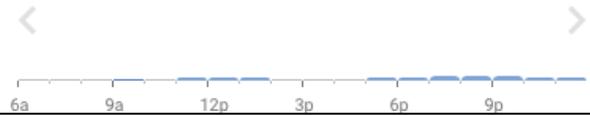


Rust City Brewery: 4.5 Google Rating

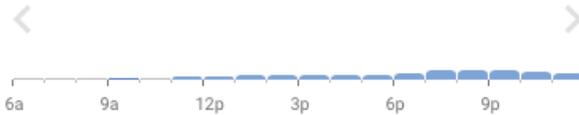
Popular times Mondays ?



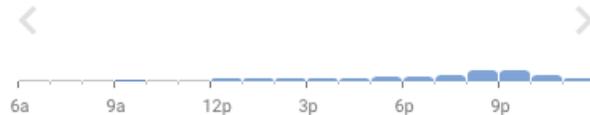
Popular times Tuesdays ?



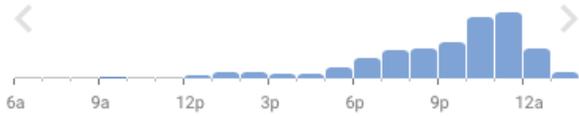
Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



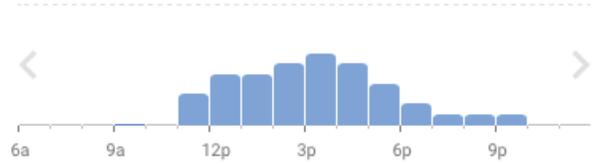
Popular times Sundays ?



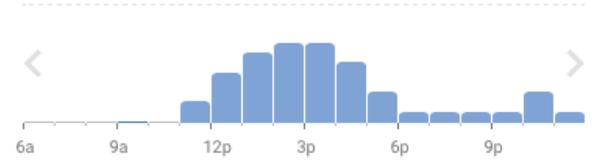


Mezza Cafe: 4.5 Google Rating

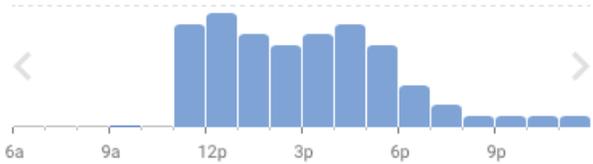
Popular times Mondays ?



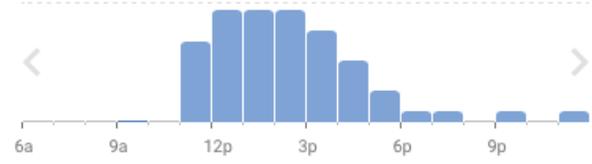
Popular times Tuesdays ?



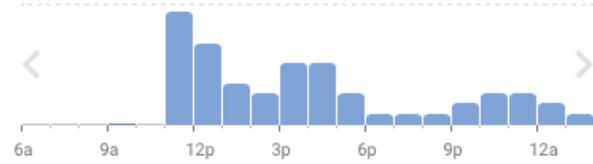
Popular times Wednesdays ?



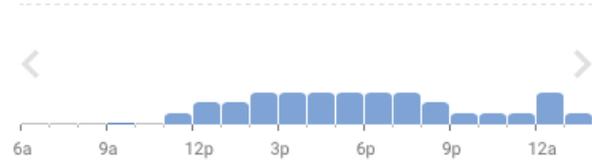
Popular times Thursdays ?



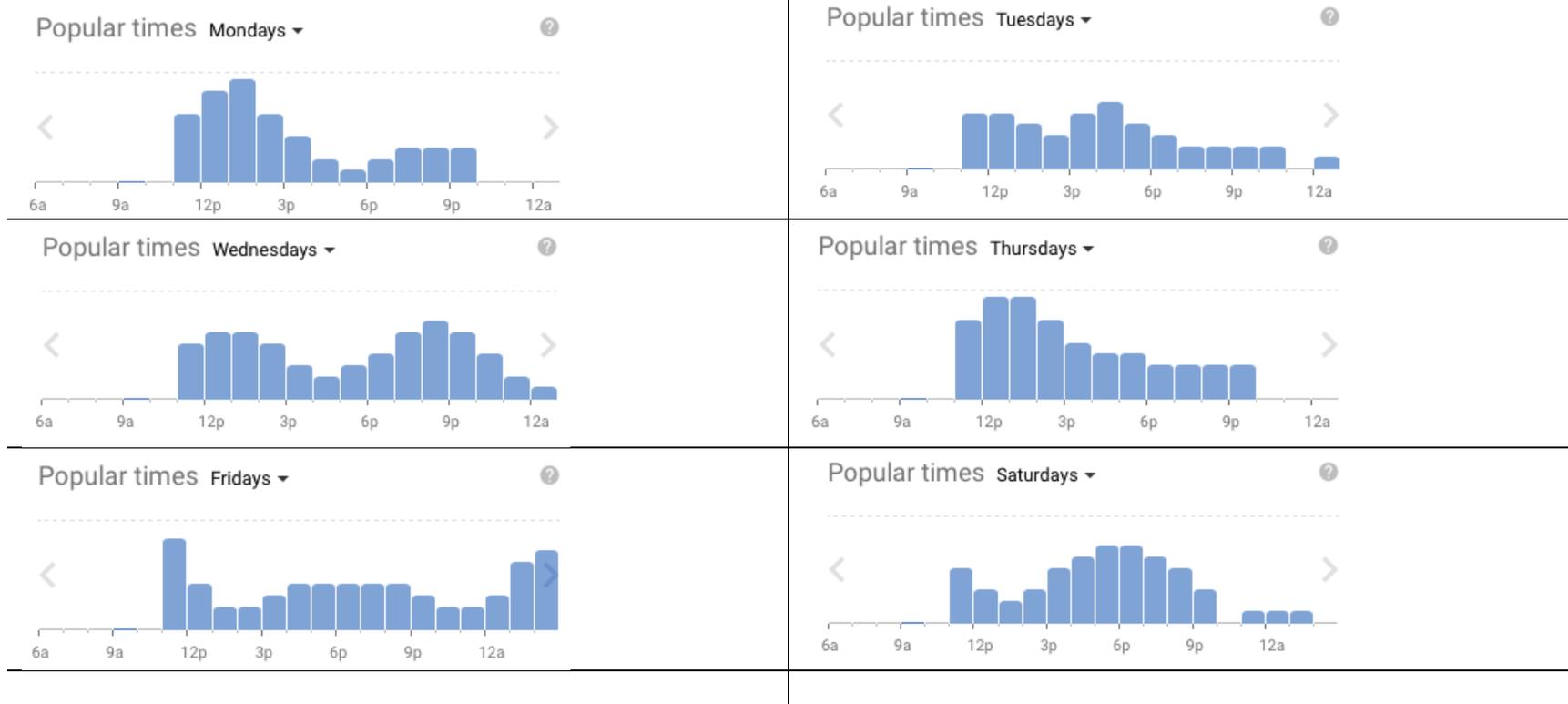
Popular times Fridays ?



Popular times Saturdays ?



Wendel Clark's Classic Grill and Bar: 3.4 Google Rating





National Pizza: 4.4 Google Rating

Popular times Mondays ?



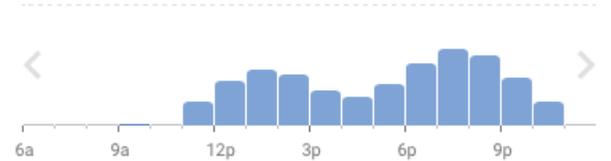
Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



Popular times Sundays ?





Gino's Pizza: 3.2 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



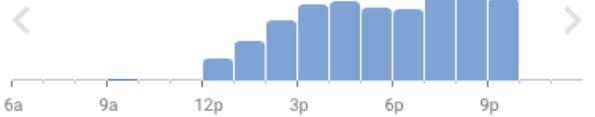
Popular times Fridays ▾



Popular times Saturdays ▾

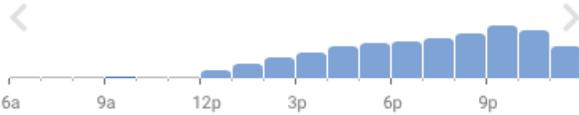


Popular times Sundays ▾

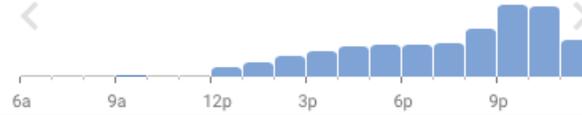


Sapporo: 4.0 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



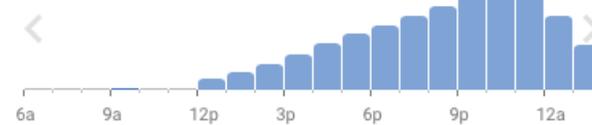
Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾

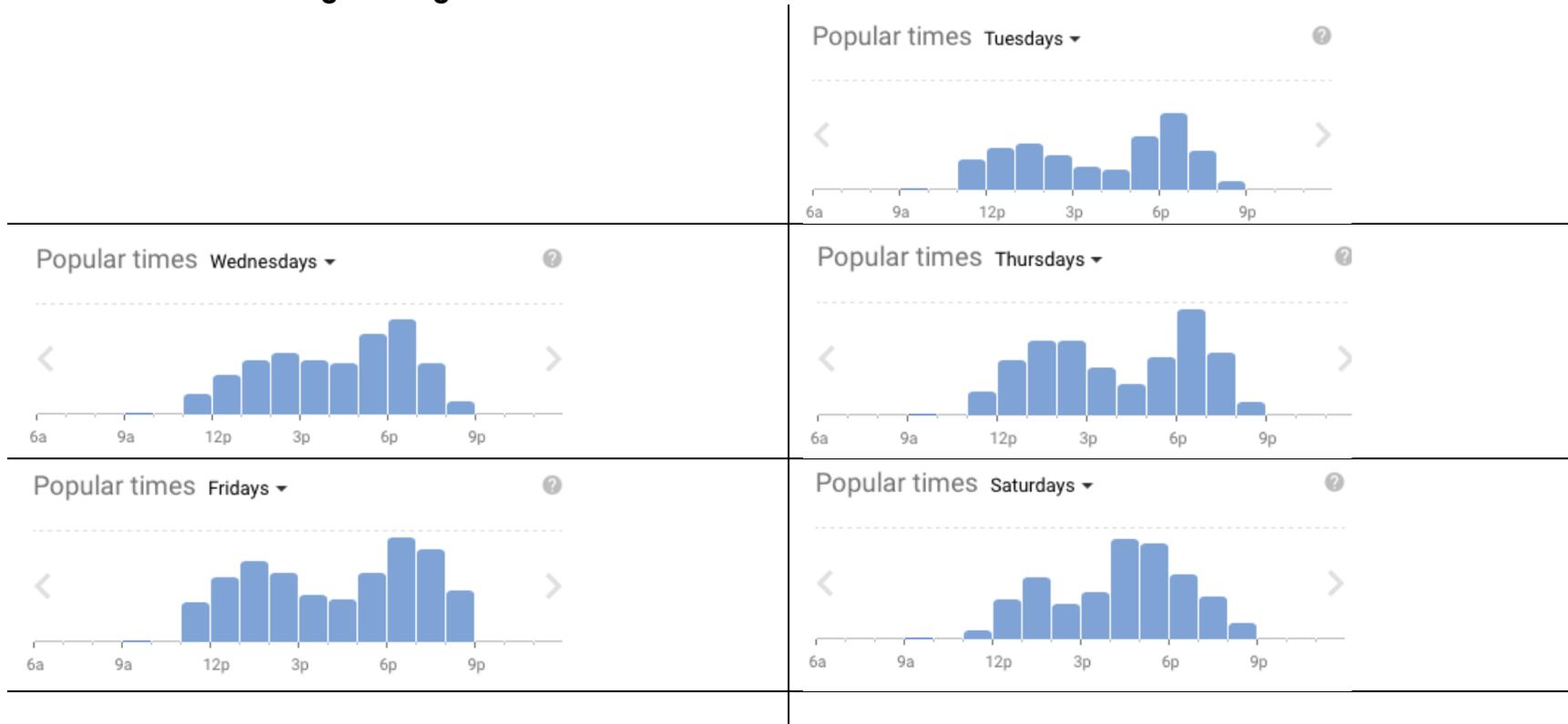


Popular times Sundays ▾

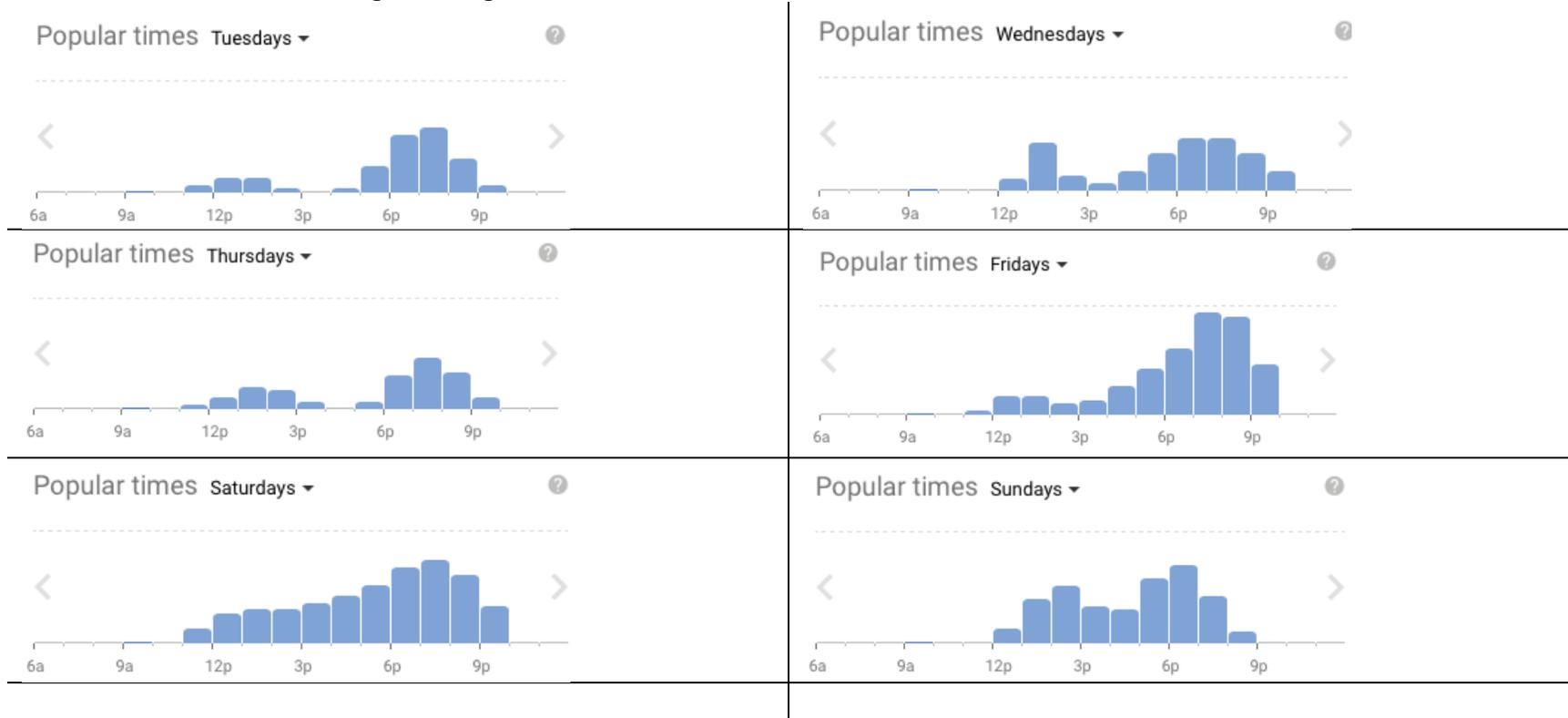




Coco Fresh Tea: 4.6 Google Rating



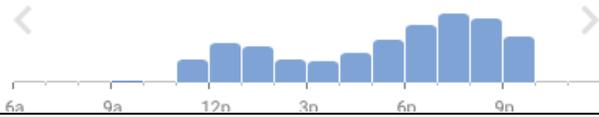
Tea Hut Bubble Tea: 4.1 Google Rating





Lulu's Shawarma: 4.5 Google Rating

Popular times Tuesdays ▾



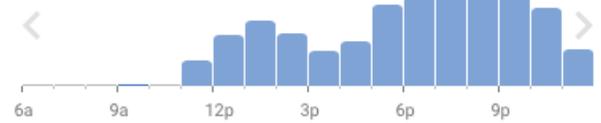
Popular times Wednesdays ▾



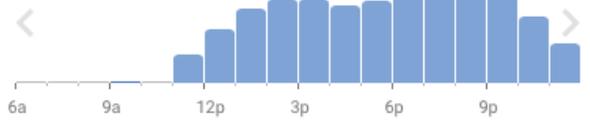
Popular times Thursdays ▾



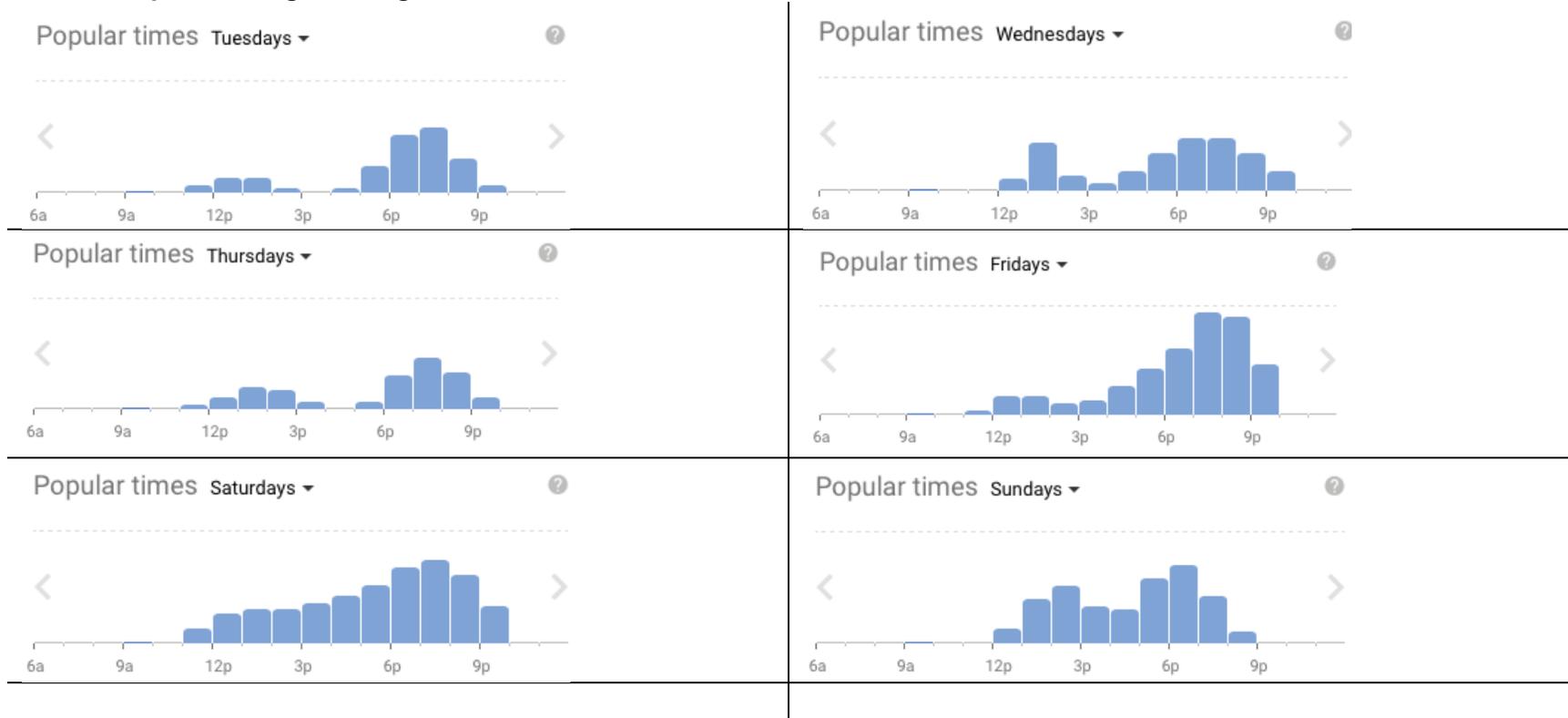
Popular times Fridays ▾



Popular times Saturdays ▾



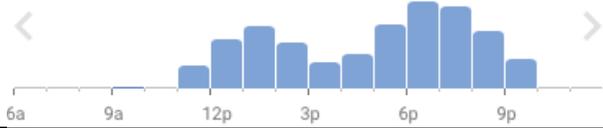
Fsh and Chp: 4.6 Google Rating





Hambgr: 4.5 Google Rating

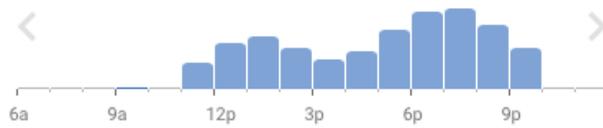
Popular times Mondays ?



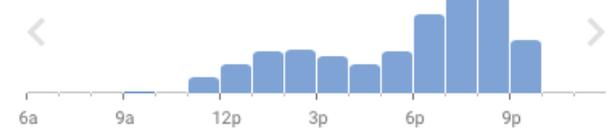
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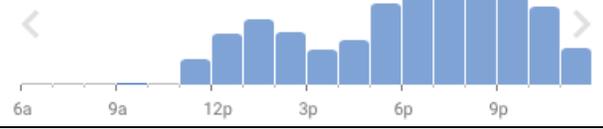
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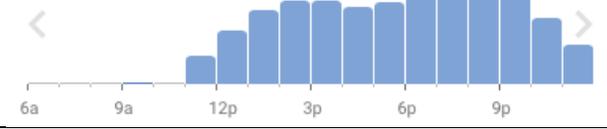
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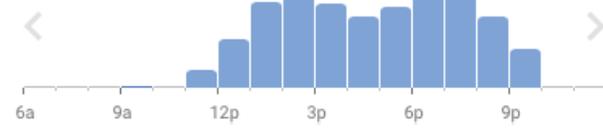
Popular times Fridays ?



Popular times Saturdays ?



Popular times Sundays ?



The Mule: 4.5 Google Rating

Popular times Mondays ?



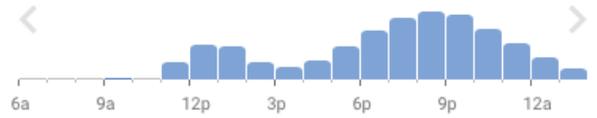
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Popular times Wednesdays ?



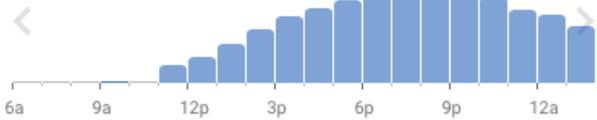
Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?

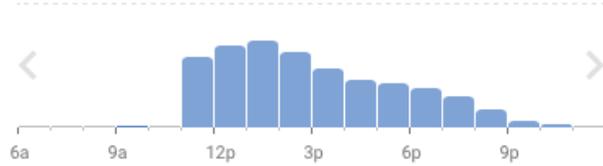


Popular times Sundays ?

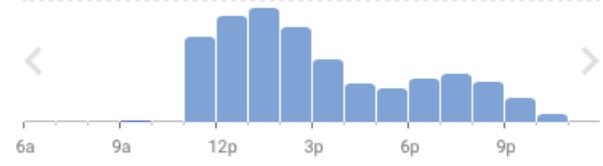


The French: 4.4 Google Rating

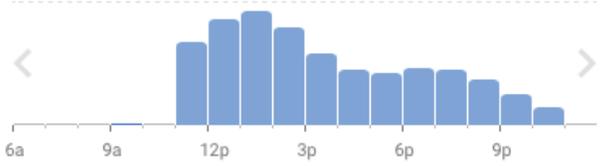
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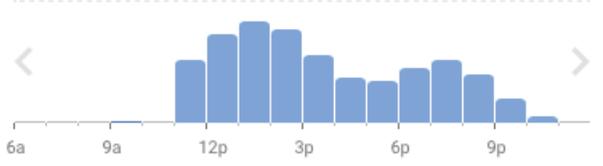
Popular times Tuesdays ?



Popular times Wednesdays ?



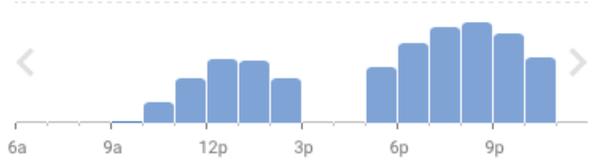
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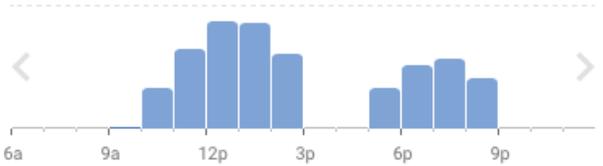
Popular times Fridays ?



Popular times Saturdays ?



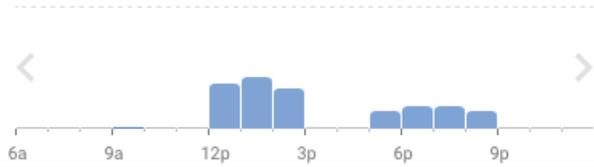
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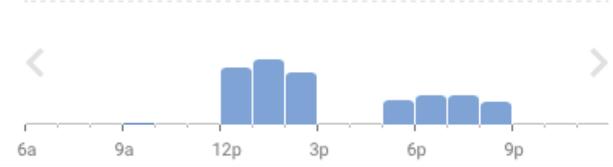


Berkeley North: 4.5 Google Rating

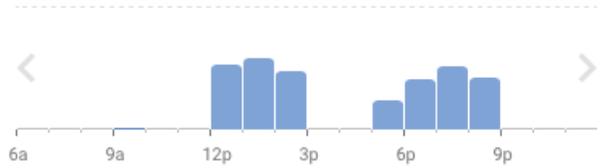
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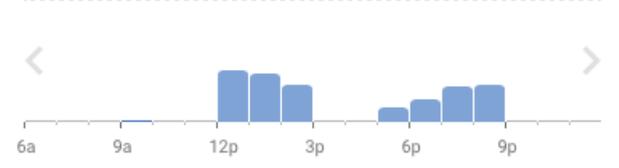
Popular times Tuesdays ?



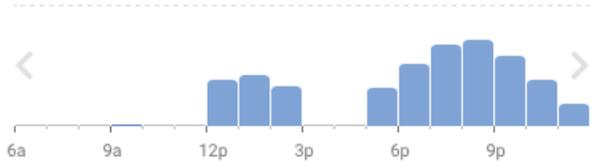
Popular times Wednesdays ?



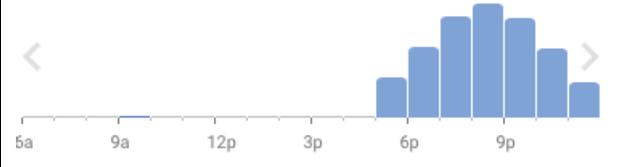
Popular times Thursdays ?



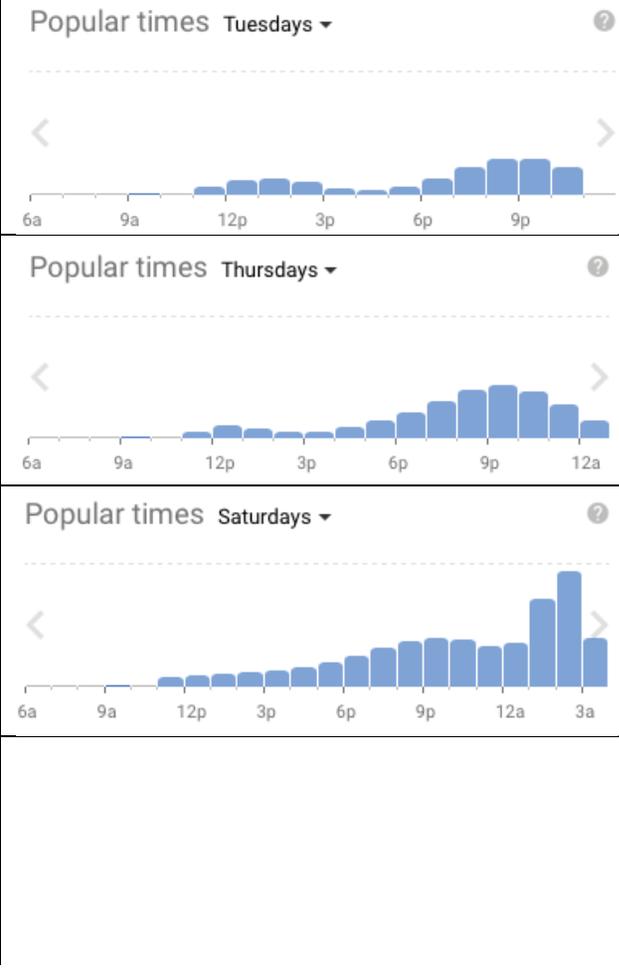
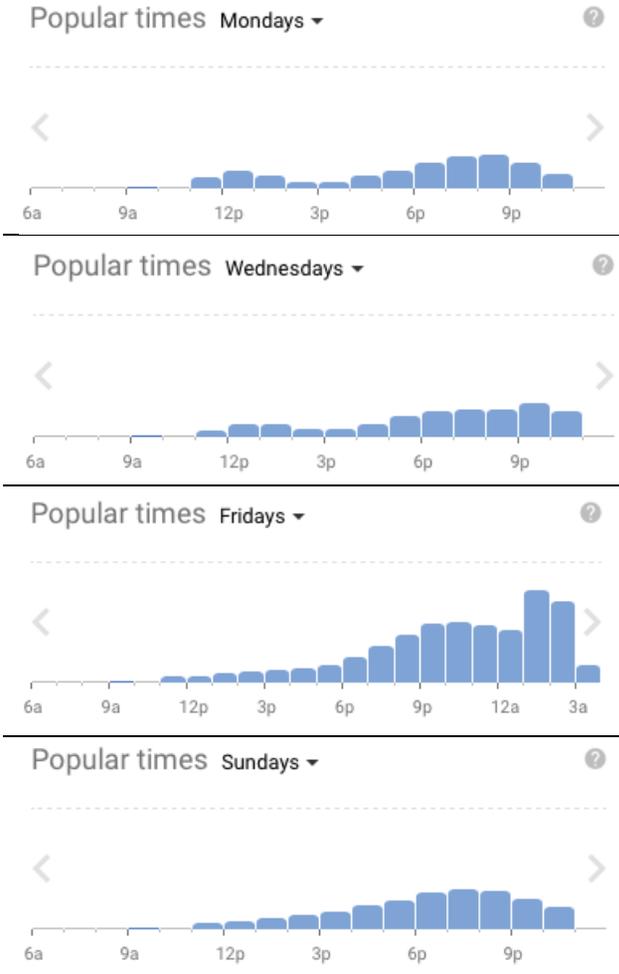
Popular times Fridays ?



Popular times Saturdays ?



Burrito Boyz: 4.4 Google Rating





Saigon House: 4.4 Google Rating

Popular times Mondays ▾



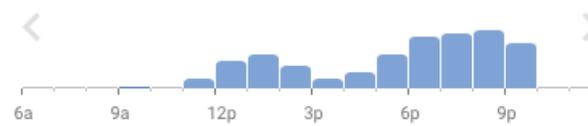
Popular times Thursdays ▾



Popular times Saturdays ▾



Popular times Wednesdays ▾



Popular times Fridays ▾





Aijo: 4.5 Google Rating

Popular times Sundays ▾



Popular times Tuesdays ▾



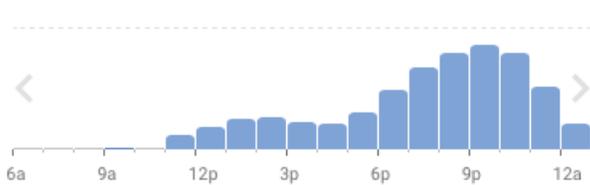
Popular times Wednesdays ▾



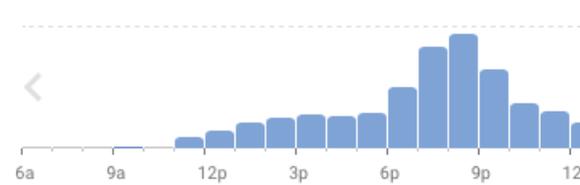
Popular times Thursdays ▾



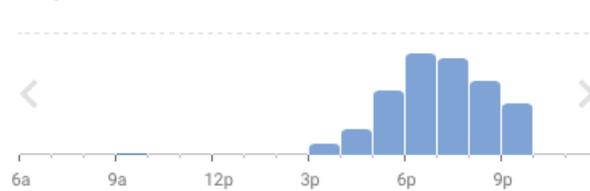
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾



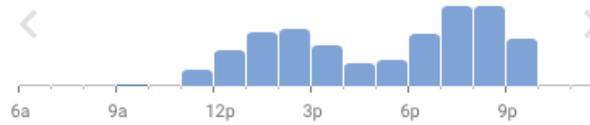


Tatemono Sushi: 4.1 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



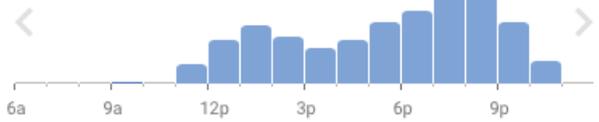
Popular times Wednesdays ▾



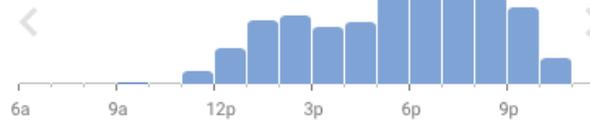
Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾

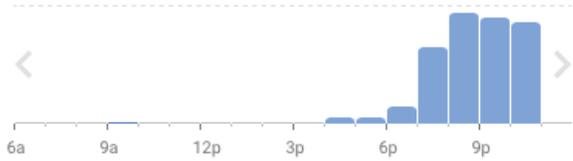


Popular times Sundays ▾

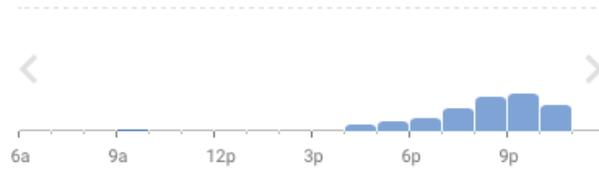


Serve Ping Pong: 4.5 Google Rating

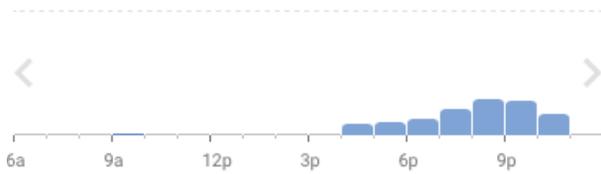
Popular times Mondays ?



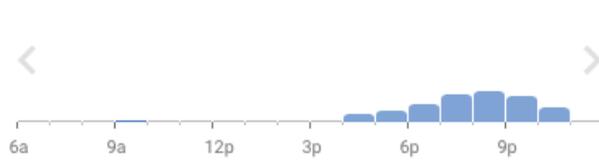
Popular times Tuesdays ?



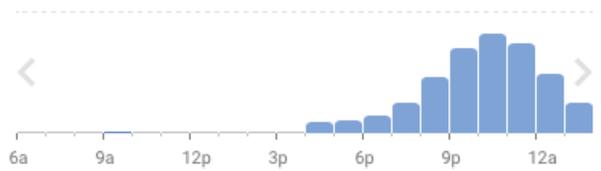
Popular times Wednesdays ?



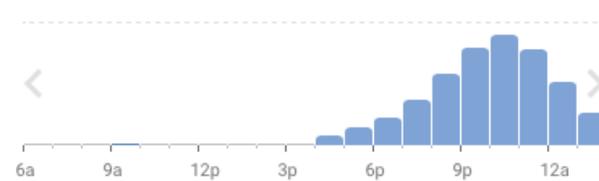
Popular times Thursdays ?



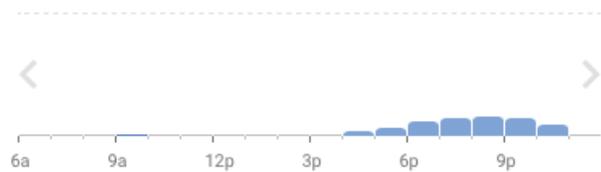
Popular times Fridays ?



Popular times Saturdays ?

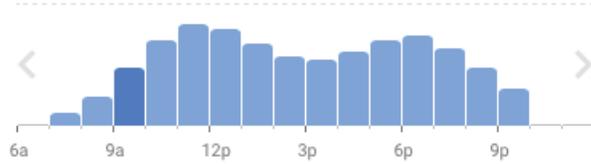


Popular times Sundays ?

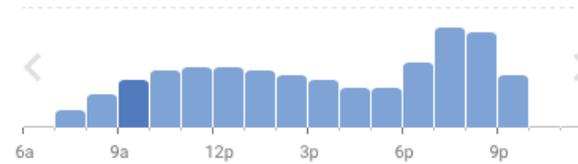


Coffee Culture: 3.7 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



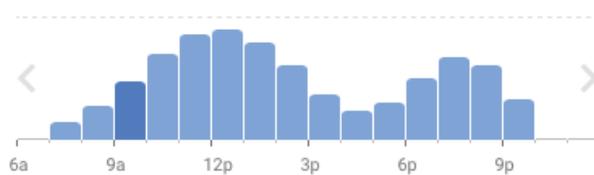
Popular times Wednesdays ▾



Popular times Thursdays ▾



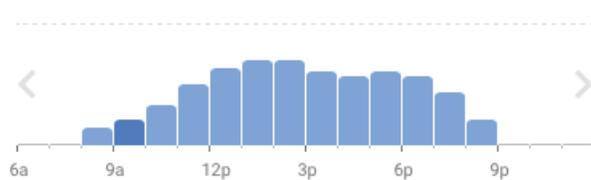
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾





Toast Wine Bar: 4.3 Google Rating

Popular times Tuesdays ▾



Popular times Thursdays ▾



Popular times Saturdays ▾



Popular times Wednesdays ▾



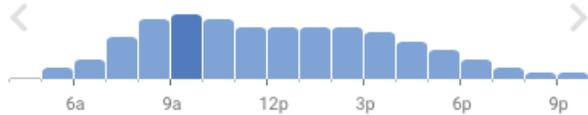
Popular times Fridays ▾





Tim Horton's King St. E.: 3.4 Google Rating

Popular times Mondays ?



Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?





Tim Horton's John St. S.: 3.9 Google Rating

Popular times Mondays ?



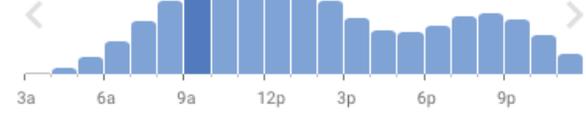
Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?

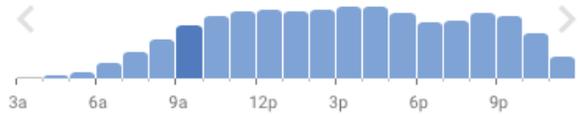


Popular times Saturdays ?

LIVE *Not too busy*



Popular times Sundays ?





Findings

- Eating establishments are a key component of Downtown Hamilton BIA's business composition.
- The majority of the businesses have found a business plan model whereby they can cater to multiple segments. There are those that can cater to workers as well as residents.
- There is strength in weekday lunch and afternoon visitation as well as weekday evening and weekends.
- Many businesses have a late evening following and operate 18 hours a day/seven days a week.
- Unique businesses are able to cater to one time frame but these are rare in Downtown Hamilton BIA.



4.0 Quality of Life Statistics – Housing Prices

4.1 Housing Prices

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

Hamilton Centre Average House Price

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

Source: Realtors' Association of Hamilton and Burlington



5.0 Downtown Hamilton BIA Website Audit

Background and Methodology

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

The five areas assessed were:

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

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

- Visitors
- Businesses
- Investors
- City and Partnerships (e.g. residents, federal gov't, etc.)

Nature of Findings

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



Detailed Findings

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

Rating of Key Areas of BIA Website

Area Reviewed	Downtown Hamilton BIA ★★★★
Functionality	Excellent
Content & Purpose	Very Good
Innovation and Interactivity	Very Good
Visual Design	Very Good
Mobile Optimized	Excellent
Accessibility Compliance	27/301

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

Content Provided in BIA Websites (√ indicates it was included)

Content Provided	Downtown Hamilton BIA
Directory	√
Testimonials	
Member portal/login	

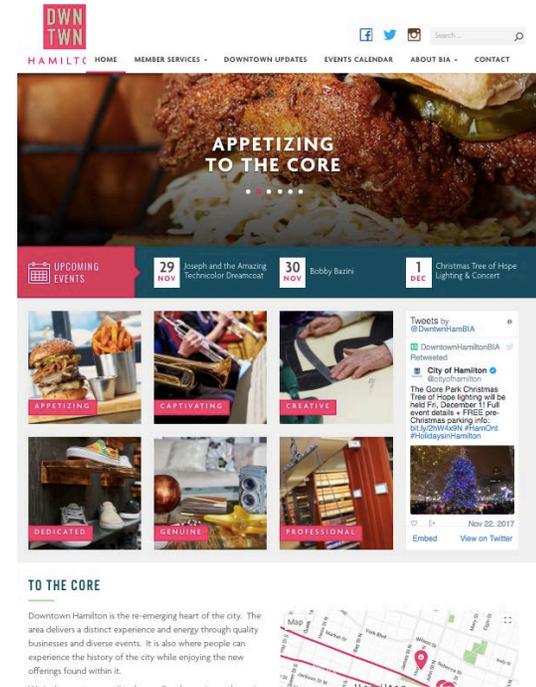
AODA Compliance

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

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

Downtown Hamilton BIA

The Downtown Hamilton website follows a newer design which makes access to information on the site simpler. Good use of creative makes specific areas of the site stand out such as its events and its focus on businesses related to: arts, entertainment, food/drink, shopping/services, professional businesses and living. The site is mobile optimized which is key given the large numbers of Canadian mobile users. The target of the website is a mix of businesses, visitors, investors and potential partners. It also includes a newsletter signup and is extremely active on Twitter, with presence on other social media platforms as well.



DOWNTOWN UPDATES



2017 Christmas in Gore Park

The holidays are fast approaching & what better way to get in ...



Halloween Spooktacular Sideshow – Friday, October 27th!

Join us in Gore Park on Friday, October 27th for the Halloween ...



Annual General Meeting

We have begun planning for our Annual General Meeting of the Downtown ...



Food Truck Schedule Promenade 2017

Here is the food truck schedule for the Summer Promenade in Gore ...

[See All Updates](#)

NEWSLETTER SIGN UP

The Downtown Update is the e-newsletter sent by the Downtown Hamilton Business Improvement Area to keep both members of the BIA and interested supporters of Downtown up-to-date with activities and issues in the core of our community.

SUBSCRIBE TO RECEIVE UPDATES

Your email address



Events are clearly marked and newsletter signup is available.

Hallowe'en Event

Downtown Hamilton BIA Website Conclusions

The Downtown Hamilton BIA website has good visual presence online with excellent imagery and content. Some BIA sites take it one step further with unique features to differentiate the retail/shopping area/food/restaurants/things-to-do for visitors and potentially pique the interest of investors/other businesses for its unique nature such as showcasing the locations of street murals within their area. Other areas for improvement includes the accessibility of the website especially as it relates to images and video content.



6.0 Commercial Audit and Rent Review

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

The following table illustrates the audit for all commercial businesses including retail and office.

The subsequent table illustrating change in business mix from 2009 to 2017 only focuses in on retail businesses as that was the only information collected during that period.



Downtown Hamilton BIA Commercial Business Audit – 2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	9	1.9%	14,300	0.9%
Furniture and Home Furnishings	1	0.2%	2,000	0.1%
Electronics and Appliance Stores	2	0.4%	1,100	0.1%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	1	0.2%	2,000	0.1%
Sporting Goods, Hobby, Book, Music	2	0.4%	2,800	0.2%
Other Retail	10	2.1%	16,100	1.0%
Total Retail	25	5.2%	38,300	2.4%
Food/Drug Retail				
Food and Beverage Stores	7	1.5%	7,500	0.5%
Health and Personal Care Stores	3	0.6%	3,600	0.2%
Total Food/Drug Retail	10	2.1%	11,100	0.7%
Food Services	50	10.5%	115,700	7.4%
Services				
Personal Services	6	1.3%	5,044	0.3%
Financial Services	4	0.8%	15,000	1.0%
Medical Services	15	3.1%	9,400	0.6%
Professional Services	292	61.1%	1,000,230	63.8%
Recreation Services	0	0.0%	0	0.0%
Other Services	6	1.3%	14,000	0.9%
Total Services	323	67.6%	1,043,674	66.6%
Total Occupied	408	85.4%	1,208,774	77.1%
Vacant Retail	25	5.2%	30,376	1.9%
Vacant Office	35	7.3%	238,966	15.3%
Redevelopment Sites	10	2.1%	88,827	5.7%
Total	478	100.0%	1,566,943	100.0%

Source: 360 Collective



Downtown Hamilton BIA Commercial Business Audit (excludes professional services for comparison to 2009)

	2017				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	6.0%	14,300	0.9%	13	7.6%	16,000	4.8%
Furniture and Home Furnishings	1	0.7%	2,000	0.1%	2	1.2%	2,200	0.7%
Electronics and Appliance Stores	2	1.3%	1,100	0.1%	3	1.8%	3,200	1.0%
Building Supply and Garden Equipment	0	0.0%	0	0.0%	0	0.0%	0	0.0%
General Merchandise	1	0.7%	2,000	0.1%	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	2	1.3%	2,800	0.2%	5	2.9%	8,800	2.7%
Other Retail	10	6.6%	16,100	1.0%	5	2.9%	5,600	1.7%
Total Retail	25	16.6%	38,300	11.7%	28	16.4%	35,800	10.8%
Food/Drug Retail								
Food and Beverage Stores	7	4.6%	7,500	0.5%	11	6.4%	11,800	3.6%
Health and Personal Care Stores	3	2.0%	3,600	0.2%	5	2.9%	7,700	2.3%
Total Food/Drug Retail	10	6.6%	11,100	3.4%	16	9.4%	19,500	5.9%
Food Services	50	33.1%	115,700	35.3%	56	32.7%	134,900	40.7%
Services								
Personal Services	6	4.0%	5,044	0.3%	13	7.6%	10,000	3.0%
Financial Services	4	2.6%	15,000	1.0%	4	2.3%	15,000	4.5%
Medical Services	15	9.9%	9,400	0.6%	6	3.5%	8,500	2.6%
Recreation Services	0	0.0%	0	0.0%	2	1.2%	15,000	4.5%
Other Services	6	4.0%	14,000	0.9%	6	3.5%	14,000	4.2%
Total Services	31	20.5%	43,444	13.3%	31	18.1%	62,500	18.8%
Total Occupied	116	76.8%	208,544	63.6%	131	76.6%	252,700	76.2%
Vacant Retail	25	16.6%	30,376	9.3%	38	22.2%	67,501	20.3%
Vacant Office	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Redevelopment Sites	10	6.6%	88,827	27.1%	2	1.2%	11,500	3.5%
Total	151	100.0%	327,747	100.0%	171	100.0%	331,701	100.0%



Findings

The Downtown Hamilton BIA audit included professional services in the office towers.

- There is approximately 1.6 million square feet of commercial space in Downtown Hamilton BIA. There are 478 businesses.
- Retail vacancy accounts for a small percentage (2%) however, office vacancy is higher at 15%.
- Retail merchandise accounts for a small fraction of the retail at 2.4%.
- Food and drug retailers include a handful of convenience type stores at less than 1%.
- Food services is a major component at over 115,000 sq. ft. or 7% of the total square footage.
- There is over 1 million square feet of professional office space. At 200 sq. ft. per worker, this is equivalent to over 5,000 office workers. This is similar to the City of Hamilton Employment Survey.
- The other major feature is the fact that approximately 90,000 sq. ft. of commercial space is being redeveloped at present. This could alter the face of Downtown Hamilton retail and commercial.

In the comparison of 2017 to 2009/2010, the comparison excludes professional offices in the office towers.

- Vacancy has fallen by half.
- The amount of retail merchandise has remained approximately the same.
- There are fewer food services however, Downtown has fewer large night clubs. The quality of the food service offering has improved.
- There are fewer convenience stores in Downtown than in 2009/2010.

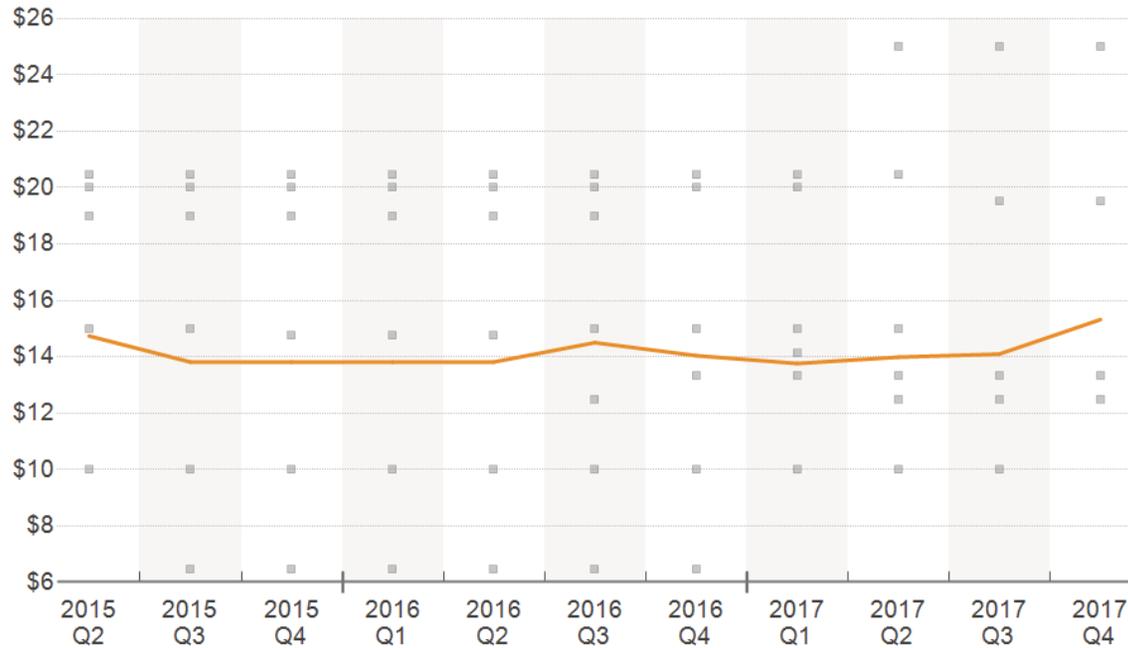


6.1 Downtown Hamilton BIA Area Retail Rents

Net Rent Analysis

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

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



Findings Downtown Hamilton BIA Net Rents

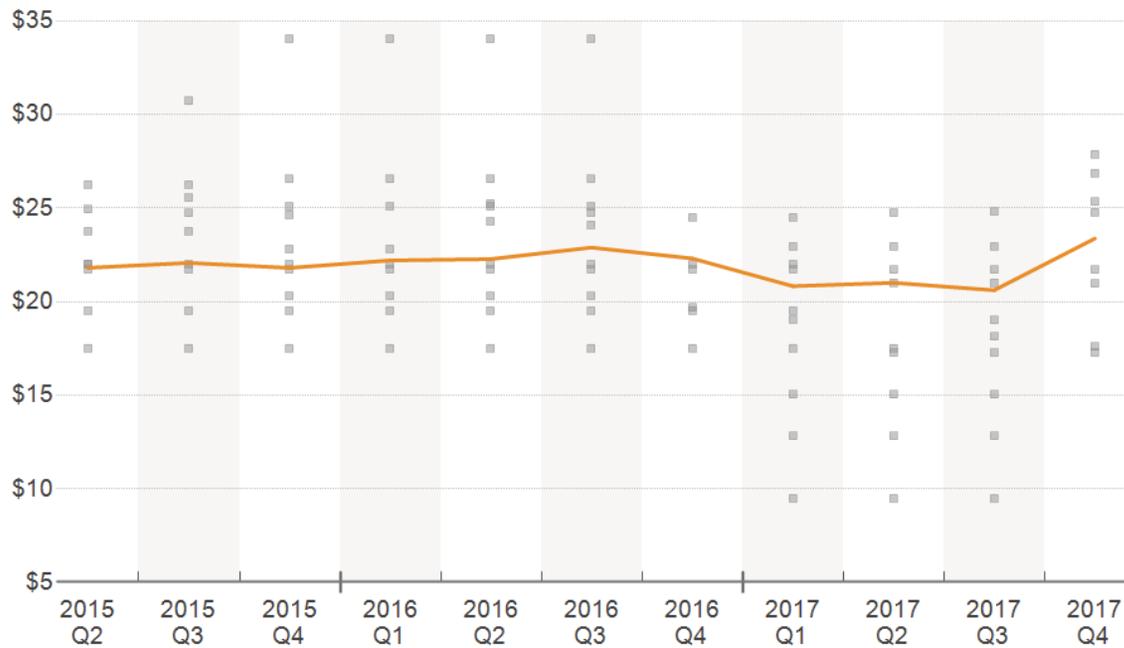
- Retail rents are trending stable.
- However, the sample of rents ranges from a low of \$6/sq. ft. to \$25/sq. ft.
- Average rents are \$15/sq. ft. but trending upwards.
- Within the total Downtown area, retail rents are \$17.56/sq. ft.
- Rents vary from \$18/sq. ft. to \$38/sq. ft. on James St. N.; \$15/sq. ft. to \$20/sq. ft. on King William; \$10/sq. ft. to \$21/sq. ft. on King St. E.; and \$13/sq. ft. on John St. S.

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

Office Gross Rental Rate

Office space within the BIA has been shifting over the years. Office rents are measured as gross rental rates that includes taxes, maintenance, insurance, and any common area charges.

Office Gross Rental Rate Per Square Foot



Source: CoStar

Findings Office Gross Rent

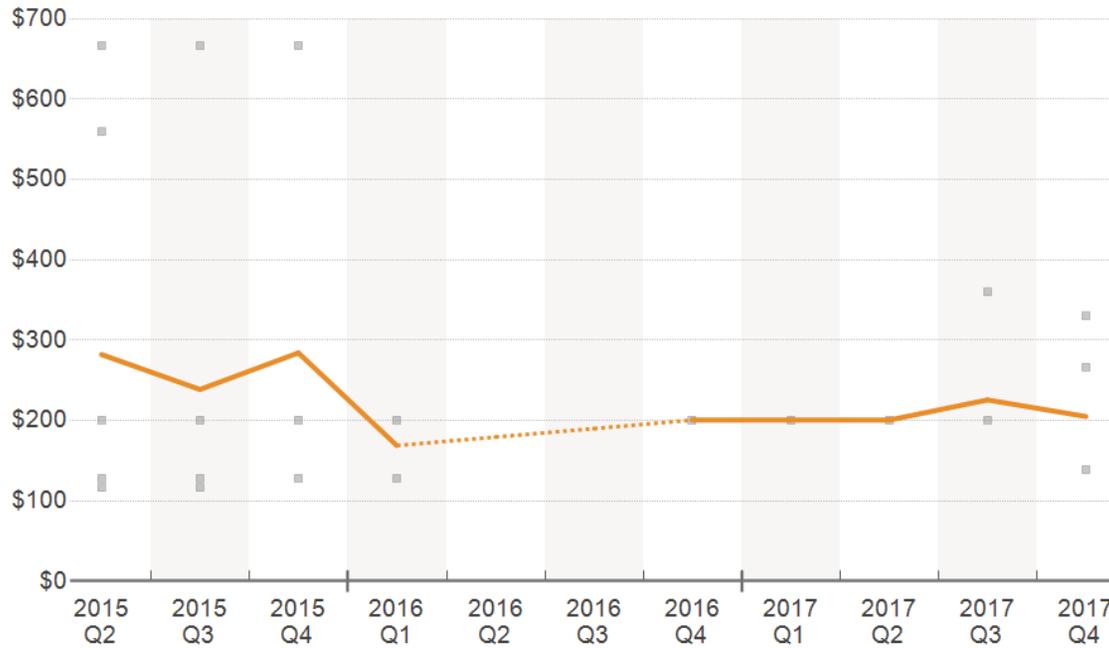
- Office rental rates have been stable in the past three years at \$22/sq. ft.
- They range from a low of \$10/sq. ft. to \$35/sq. ft. (69 John St. S.).
- Within the total Downtown area, office gross rents average \$23.58/sq. ft.



Average Asking Price/Sq. Ft.

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

Average Asking Price/Sq. Ft.



Source: CoStar

Findings Average Asking Price

- Overall retail-based properties in Downtown Hamilton BIA are \$200/sq. ft. on average.
- This is similar to the sale price for all of Downtown.
- However, highly coveted accessible and visible locations are selling for close to \$700/sq. ft.
- Other locations on side streets sell for less.



Findings

- Retail and office commercial rates have been stable for the past three years.
- While they have not been increasing, it is a positive sign that they haven't declined either.
- It is important to note that they are averages for the whole area and account for side streets as well as major streets in the BIA and Downtown.
- While the rents are better than several years ago, there is still a gap between rental rates that support redevelopment and achievable rents that tenants can pay for some streets in the Downtown. James St. N. and other streets such as King William, parts of King St. E. and John St. S. may be able to support some redevelopment potential through a positive ROI.



7.0 Investment in Downtown Hamilton BIA

The following tables and charts highlight the current and past investment in Downtown Hamilton BIA properties. The assessment includes a review of:

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

Past and Current Development Applications

Address	Committee of Adjustment or Zoning Code	Reference Number	Additional Details
26 Main St. E.	MDA	16	45 Outdoor patio on 2nd floor
21 Main St. E.	DA	16	116 Construct 5 storey 6,300 m2 office
98 James St. S.	ZAR	14	30 Construct 30 storey condo
64 Main St. E.	DA	17	64 Construct 18 storey mixed use with 183 units
125 King St. E.	25 CDM	Conv 14	2 Convert 125 units to condo
112 King St. E.	DA	13	12 Royal Connaught
112 King St. E.	25 CDM	201	601 Construct 13 storey condo with 231 units
112 King St. E.	25 CDM	201	611 Convert 6 commercial units to condo commercial
35 John St. S.	HMA	13	105 Construct mixed use with a restaurant on ground floor and 24 units
19 John St. S.	SPA	15	170 units
19 John St. S.	HMA	17	345
82 James St. N.	HMA	17	339
72-76 James St. N.	HMB	13	95
68 James St. N.	HMA	14	95
46 James St. N.	DA	16	66 Construct 21 storey with 159 units
28 James St. N.	MDA	13	94 Outdoor patio
27 King William	MDA	13	304 Outdoor patio
31 King William	MDA	15	120 12.07 m2 outdoor patio
33-35 King William	DA	15	46 Construct 6 storey addition 25 units total



31 - 39 King William	DA	5		
31 - 39 King William	25 CDM	201	602	
44 King William	MDA	16	72	26.9 m2 outdoor patio
43 King William	MDA	17	117	40.3 m2 outdoor patio
55 King William	HMA	15	47	
100 Wilson	DA	15	183	Construct 4,025 m2 police services building
71 Rebecca	ZAC	17	53	Rezone 30 storey 1,210 m2 commercial and 371 units
139 King St. E.	HMA	17	17	
121-125 King St. E.	SPA	17	86	Renovate 2-3 storey addition add 24 units to existing 16 units
95 King St. E.	HMA	12	116	
81 King St. E.	HMA	15	351	
43-51 King St. E.	ZAR	17	47	Construct 25 storey 869 m2 commercial and 525 units
10 James St. N.	DA	16	121	Construct 2 storey addition for office
18-30 King St. E.	SPA	17	87	Part demolish and adaptive re-use of building
46 King St. E.	SPA	15	10	Construct 2 storey addition on top of existing
68 King St. E.	HMA	12	296	

Source: City of Hamilton Planning and Economic Development Department

Legend

SPA: Site Plan Approval

DA, MDA: Development Application (modified)

CDM: Condominium

HM/A, HM/B: Committee of Adjustment

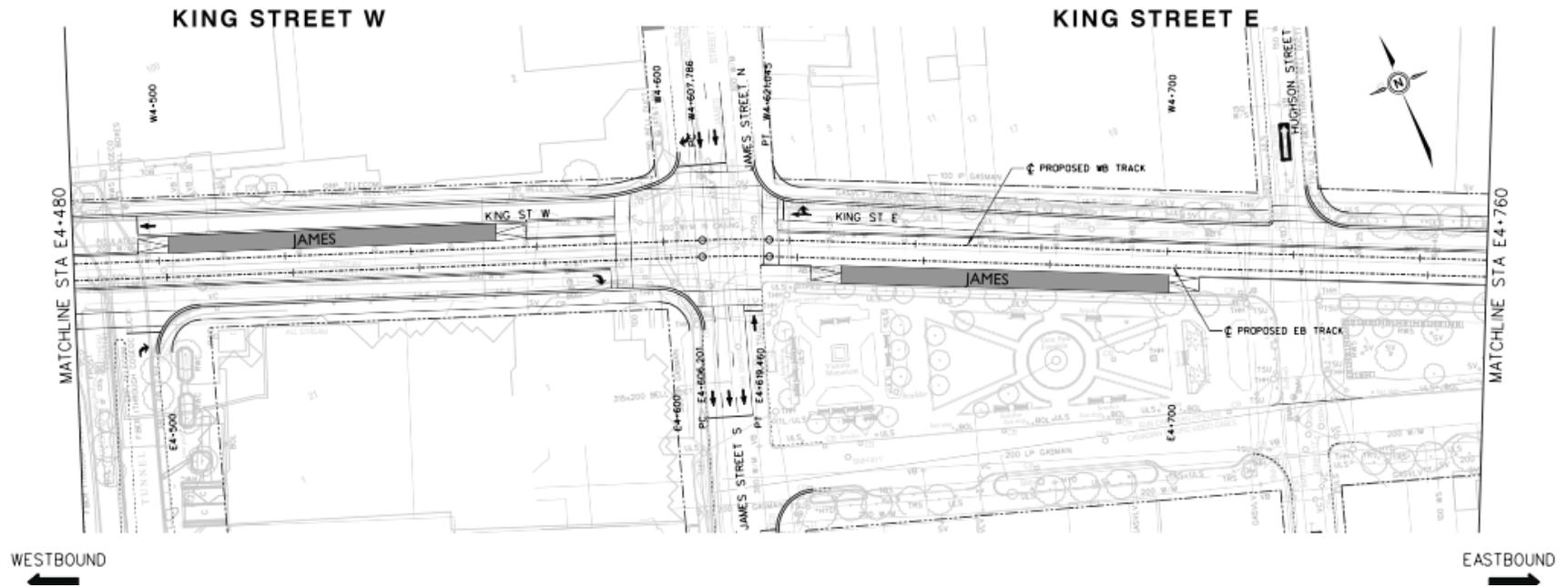
ZAR: Zoning ByLaw Amendment Application

ZAC: Zoning Application

Proposed LRT Stations

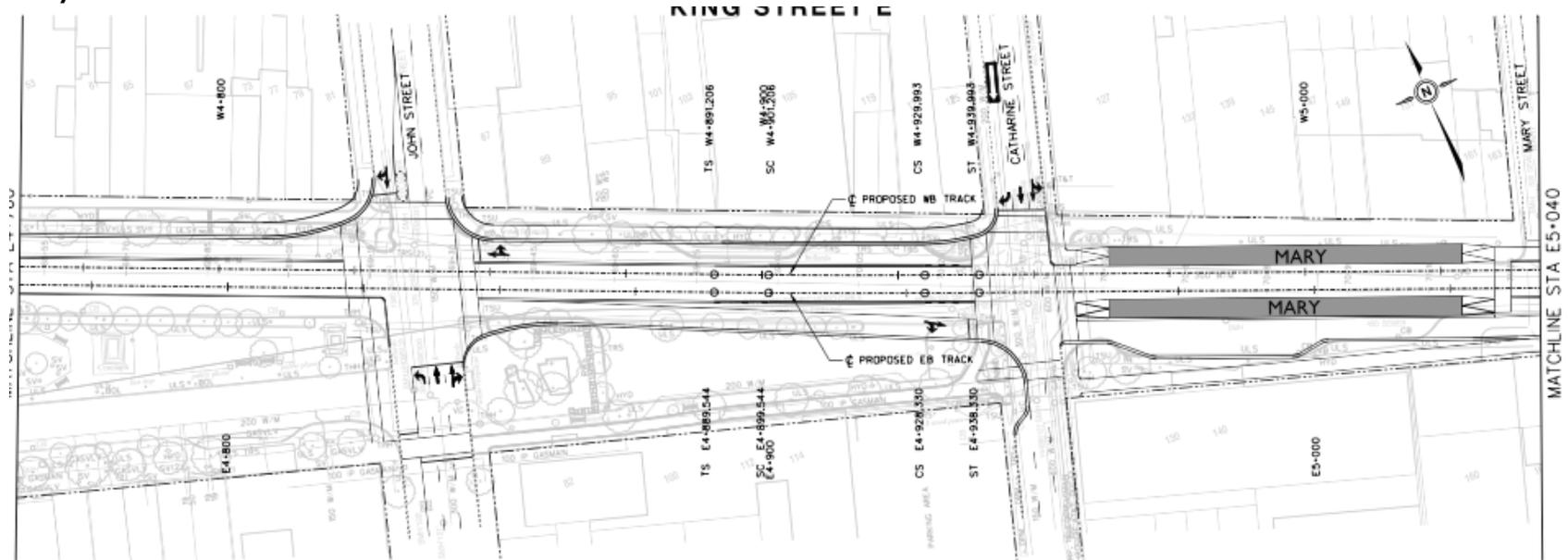
- Downtown Hamilton BIA will have two stations at King St. E. and James St. and Mary St.

James St. LRT Station





Mary St. LRT Station





Commercial Building Permits

Downtown Hamilton BIA Value of Commercial Building Permits

Year	Commercial	Industrial	Total
2012	\$7,611,361	\$0	\$7,611,361
2013	\$4,437,500	\$13,000	\$4,450,500
2014	\$959,560	\$0	\$959,560
2015	\$5,203,500	\$0	\$5,203,500
2016	\$17,421,190	\$0	\$17,421,190
Total	\$35,633,111	\$13,000	\$35,646,111

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

Findings

- Over \$35 million in building permits have been issued for commercial and industrial related properties in Downtown Hamilton BIA boundaries. This excludes residential development.
- The residential optimism is being transferred to the commercial sector including retail and office development. The Alley project at James St. N. and King St. W. are witness to this change as are the commercial properties on King St. W. at Gore Park.



Grants and Incentives

Downtown Hamilton BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG
2012	\$174,316.79
2013	\$266,694.12
2014	\$256,092.23
2015	\$33,900.00
2016	\$22,534.46
Total	\$753,537.60

Source: City of Hamilton

Findings

- Investment in Downtown Hamilton BIA commercial businesses has been significant through the use of City incentives. Over \$750,000 in value has been invested through the use of the various programs available to businesses owners.
- From 2012 to 2014, the investments were large. However, 2015 and 2016 are lower in value.
- This could be due to the changing nature of land ownership and business development in Downtown which is towards larger ownership.

Assessed Value

Downtown Hamilton BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2012	\$137,320,410	
2013	\$137,703,004	0.3%
2014	\$138,868,621	0.8%
2015	\$138,799,500	0.0%
2016	\$140,945,900	1.5%
2017	\$159,026,159	12.8%

Source: MPAC, City of Hamilton



Findings

- From 2010 to 2015, the assessed value of the commercial areas within the Downtown Hamilton BIA has increased over \$22 million. This represents an annualized rate of 2.5%. Most of the increase occurred in 2017 with a 12.8% increase from 2016. Previous to that the assessed values had remained relatively stable (note this reflects some issues with data collection at MPAC).

Implications for Downtown Hamilton BIA

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

Gore Park Investment

- Gore Park is located at [1 Hughson Street South](#), in Ward 2. Redevelopment of Gore Park is part of the Gore Pedestrianization Initiative.
- Based on recommendations from the Downtown Transportation Master Plan Review in 2008, Council approved the following three recommendations:
 1. Relocate buses to the new bus terminal on MacNab Street.
 2. Undertake a design study to see how the south leg of King would look as a pedestrianized space.
 3. Begin the pedestrianization project as a pilot.
- The design process involved comprehensive public consultation.

Progress

Date	Completions
Spring 2017	Phase 2 construction completed
July 2015	Phase 1 construction completed
July 2014	Public Consultation for the final design of the Memorial wall and features for Veterans' Place
Spring 2014	Phase 1 construction begins
Feb 2013	General Issues Committee directed staff to accelerate the Gore Pedestrianization Initiative
Nov 2012	City Council approved the continuation of the Gore Pedestrianization Initiative
July 2012	Implementation of the Pedestrianization Pilot between James and Hughson Streets
Jan 2011	MacNab Bus Terminal opens removing bus traffic from the south leg of King Street East
Jan 2010	Preferred Conceptual Plan for Gore Pedestrianization Initiative is presented to Public Works Committee
2008	Gore Pedestrianization Initiative initiated by the Downtown Transportation Master Plan Review



Downtown Hamilton BIA Budget

The total Downtown Hamilton budget has increased from 2012 to 2017. The parking revenue sharing has been declining from 2013 to 2016. There is a modest uptick in 2017. As a result, the levy has been increasing.

Downtown Hamilton BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2012	\$960.58	\$3,867.71	\$13,362.15	\$18,190.44	\$250,000	\$268,190.44
2013	\$961.35	\$4,273.86	\$19,052.24	\$24,287.45	\$275,000	\$299,287.45
2014	\$1,000.00	\$4,686.92	\$18,149.90	\$23,836.82	\$300,000	\$323,836.82
2015	\$1,316.60	\$5,257.60	\$13,408.65	\$19,982.85	\$300,000	\$319,982.85
2016	\$1,325.81	\$5,544.81	\$11,629.02	\$18,499.64	\$325,000	\$343,499.64
2017	\$1,300.00	\$5,610.69	\$12,243.52	\$19,154.21	\$350,000	\$369,154.21

Source: City of Hamilton



8.0 Key Person Interviews

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

STRENGTHS

ECONOMIC DEVELOPMENT

Customer Traffic

- There are more visitors to Downtown and the composition of the visitor profile is changing towards younger people
- See more office worker traffic on the street
- Increase nighttime activity in Downtown

New Development

- The new towers and increased density have started to show on the street as more people living in Downtown
- There is a significant change in the people living Downtown through quality accommodation that is being built
- Seeing businesses respond to the changes particularly better quality restaurants – however, there are pockets of little change

Cost of Land / Buildings

- Seeing more outside investment happening and the cost of land/buildings has been increasing

Programs that Support Business Development

- Participates in the Food Tour

New Business Openings

- Witness new business openings

Affordable Rent

- Downtown is still attractive to some businesses because it offers more affordable rent than other places
- Downtown provides affordable rent



Great Views

- There are some great views from the buildings in Downtown

PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

Safety

- Generally, feels safe in Downtown
- Feels very safe in Downtown

Incentives

- The City has been good to work with for incentives – the program was easy to use and staff were professional
- Used incentives in the past and it was helpful and simple

Location / Convenience

- Choose business location as it was central and easy to get to

Beautification

- City has done a great job renovating Gore Park

MARKETING

Events

- Likes the Summer Promenade and feels it does bring in a different customers traffic to the Core
- Events are well run
- Promenade is a good event, really likes this event

Hamilton Loyalty / Passion

- Really love Hamilton
- Have an affinity for Downtown Hamilton

ORGANIZATION / GOVERNANCE

- BIA and City Partnership
- BIA and City are working together well to increase beautification efforts such as Gore Park

**BIA**

- BIA was worked hard on behalf of businesses

Community Spirit

- There is a good community spirit among the businesses and feels supportive, and vice versa



WEAKNESSES

ECONOMIC DEVELOPMENT

Return Visitation

- Seeing more people visit but they are not returning, the retention rate is low
- Older customers have moved away and are not coming to Downtown anymore
- The composition of the Downtown is changing a lot
- The people who have left were the ones with disposable income
- Current pedestrian traffic does not have a high disposable income

Number of Office Workers

- There are fewer office workers in the Downtown
- There are not enough jobs in Downtown to support all the new residents who are moving into the Downtown

Lack of Viable Business Plans

- Witness an increase in office vacancies and worried that it sends a signal that Downtown is not a viable place for business
- Commercial will not survive in Downtown, it will crash and burn

Lack of Foot Traffic

- There is less foot traffic Downtown than in the past
- Foot traffic has declined (50% lower in the past 10 years)
- New residents are not shopping in Downtown

Lack of Disposable Income

- Current customer and visitor base in Downtown does not have the money to spend in stores
- Residents have very low income and can barely afford a haircut

Taking Credit

- Hamilton's growth is not related to the BIA or City but due to market forces only – redevelopment in Downtown was bound to happen



Local Residents

- The local residents in Downtown are transient by nature, not invested in the City, and do not stay very long (do not reside in one area very long)

Lack of Enforcement of Regulations and Controls – Too Development Friendly

- Development exemptions are always given (e.g., parking)
- City is willing to let small businesses in Downtown fail in the aim to get larger scale developments
- City grants too many exemptions for bylaws, zoning, and official plan amendments

Vacancy and Level of Investment Required

- The list of available spaces in Downtown for businesses is still long and many of these spaces require significant investments to bring them up to leasability standards
- Development needs to happen faster

Renters Market

- There is low interest in leasing space including office space – tough to lease space but it is changing slowly
- Affordable rents

PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

Safety

- Misperceptions about safety come from those who do not visit often and do tend to be misperceptions
- Seeing more homeless issues
- Methadone Clinic on John St. is still an issue for the type of people going through there

Graffiti

- The consistent level of graffiti is very frustrating
- Amount of graffiti and the state of repairs of the buildings in Downtown is sad
- Have spent thousands to remove graffiti – a small problem has become a bigger issue

Parking

- Not enough parking in Downtown
- Parking availability and cost can be an issue
- Parking is a challenge



- Cost for businesses to provide parking to employees is becoming too expensive
- Parking enforcement is too strict

LRT

- Hopes LRT will be cancelled
- LRT is forcing business to determine if they will close early or relocate
- LRT will not solve all of Hamilton's problems
- Many businesses will not survive the LRT construction
- LRT benefits will not outweigh the costs of the projects – too many businesses will close and it will not bring people to the Core

Tale of Two Downtowns

- North side of Downtown has undergone significant investment and change whereas the south Downtown area has experienced little change

MARKETING

Safety

- Downtown is safe but there are misperceptions that it is not safe, negative attitude

Cheerleading

- There is a lot of cheerleading about Downtown but that has not translated into seeing on the ground changes – but believes it is coming

ORGANIZATION / GOVERNANCE

BIA

- Unaware of all that the BIA does and should find out or should be increased education on what BIA does for businesses
- Would not choose to be part of the BIA if given the choice
- Never thought of going to the BIA for help or assistance – lack of communication
- The BIA is not doing enough advocacy work on behalf of members
- BIA is too focused on a few events and do not spend enough time on advocacy issues for members



City

- There have been zoning issues with the City that have not been resolved and make it difficult to move forward with a business plan



OPPORTUNITIES

ECONOMIC DEVELOPMENT

Missing Businesses

- Greengrocer in the east end of Downtown as Nations is too far away
- Restaurants – more the better
- Dry cleaner
- Shoe store

Increased Investment Interest

- Hamilton is getting consideration for the value that it is until now it has generally been undervalued

PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

Incentives

- Wants to find out more about the incentive programs and how they could help a business

LRT

- Fell 50/50 split in that it will be good for City and Downtown in the long term but the short term construction period may be too difficult for some businesses to survive
- LRT supportive but concerned about construction's impact on businesses
- LRT will help to pay for needed infrastructure upgrades – but that is a huge price to pay
- Support LRT in general
- LRT will be a positive benefit for Downtown in the end but it will take a lot of growing pains
- LRT will bring people into Downtown because parking is limited
- LRT means that the Downtown will have improved infrastructure as part of the overall program as well as an easier mode to get around the through the City / Downtown

Redevelopment of Social Service Spaces

- As Downtown continues to redevelop there will be less need for a high proportion of social service space – start to think of redeveloping that space



ORGANIZATION / GOVERNANCE

BIA Roles

- BIA should focus on advertising and promotions and advocating on behalf of businesses with the City
- BIA should advertise the area more, bring in more businesses, run events, and beautify the area – these efforts by the BIA are working but they are slow
- BIA should be promoting the Downtown, work on beautification, advocacy work
- BIA should be supporting businesses, help new businesses, develop events, and advertise the Downtown
- BIA should be providing the voice at City Hall on behalf of businesses – the BIA is doing a relatively good job at this so far
- Role of BIA is to create an environment that is conducive to businesses being successful



9.0 Strengths Weakness, Opportunities, and Threats

9.1 Workshop #1 Feedback

In January 2018, a workshop with Downtown Hamilton BIA staff and members was organized. During the presentation and discussion, the following were key discussion items in terms of business development and increased visitation. As part of that discussion, members provided further input into their website issues and opportunities.

Cleanliness and Safety

- With improvements in the Downtown, there needs to be a continued emphasis on keeping the area clean and safe
- Police need to address the increased level of panhandling in Downtown

Hospitality Marketing

- Efforts to create a strong eating establishment and food service component to Downtown have paid off
- Downtown Hamilton BIA is taking up the needed hospitality challenge by creating packages of suggested itineraries and brochures especially when there are “fam tours” coming through Hamilton
- After dinner experience in Downtown Hamilton is flat, needs to be addressed as part of the night time economy growth sector
- New owners of Hamilton Place present renewed opportunities and the partnership opportunities

Office Workers Parking

- The members stressed the need for parking for their employees and their ability to attract quality workers to come to work in Downtown
- Downtown Hamilton still relies heavily on low-cost parking and low rents to attract businesses and workers to Downtown
- Many employers pay for their employee parking
- The Downtown Hamilton Secondary Plan advocates for increased density on the many surface parking lots
- There is a potential for a disconnect between the office workers needs for parking and the increased residential density in the Downtown
- The public and private parking lots are in disrepair and have not been kept up
- Changes to parking will allow online permit parking
- Other changes to parking include card payment, mobile payment, and different enforcement methods



Rents

- Rents are increasing as a result of increased investment

Redevelopment Adjustments

- There is a lot of land speculation in Downtown including land assembly, driving up the costs of land, rental increases, tenant displacement, and demolition clauses being attached to tenant leases
- New developments will bring a changing focus on the retail and commercial needs
- However, that is countered as some businesses may close and new businesses may open to take advantage of the changing target markets in Downtown Hamilton BIA (witnessed to date that there is tenant turnover happening)
- There is not enough office space for the different types of businesses in Downtown, the choices are limited for new start-up and early transitioning businesses
- There is increased pressure from outside developers coming into Hamilton versus the local developers

Wayfinding

- There needs to be increased investment in wayfinding that is customer-centric especially with LRT, road changes, and the redevelopment impact on roads

Jackson Square

- Outside of the BIA, but work is still needed to address issues at Jackson Square

LRT

- LRT did not come up as a major topic discussion except through wayfinding, parking and access issues, and redevelopment potential



9.2 SWOT

Strengths

- Changing local population and target markets to support businesses
- Strength of Downtown as an office worker concentration and an economic engine for Hamilton
- Growing local population of young professionals, students, and empty nesters (as well as some young families) that will feed demand for local goods and services but also will be workers in the office buildings
- Investment in properties in anticipation of new business opportunities
- Positive public relations, press, news articles on the growing attractiveness of Downtown Hamilton

Weaknesses

- Transition affecting older businesses and those that cannot adapt to the changing target markets
- Construction worries and pre-occupation with LRT that is many years out
- Over speculation on land values and rents (and MPAC assessed values) that may drive out some tenants
- Lack of office type space that allows businesses to transition in Downtown (from incubator space to Triple A space)
- Continued concerns related to cleanliness and safety
- Lack of full night time activity
- New resident and night time activity potential clashes

Opportunities

- Increased density and socio-economic shifts that allows for a local neighbourhood retail economy to grow
- Growth in new residents that will supply a new base of workers for businesses wanting to establish more creative and innovative business concepts (access to new talent base)
- Infrastructure improvements that allow easy and convenient access to Downtown that balances public transit, vehicular, cycling, and walking demands
- Enhanced Downtown Hamilton BIA identity that harnesses the change happening

Threats

- Loss of some long-standing businesses that cannot adapt to new target markets in Downtown
- Continued reliance on ample surface parking, low parking rates, and low lease rates as primary factors in Downtown Hamilton's business attraction



10.0 Changes in Recommendations from 2009/2010 to 2017/2018

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

Changes in Recommendations from 2011 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Have requisite staffing resources for the BIA organization	Have expanded the staffing and have hired a marketing coordinator (consumer and investor relations). To date, the marketing coordinator is focused on consumer relations and less on investor recruitment
Ensure that all smaller districts in the BIA have their issues addressed	The BIA continues to work on internal communications
Work collaboratively with City of Hamilton departments and other organizations	Yes, but this is always a work in progress
Expand boundaries	The BIA's attempt to expand boundaries was not successful
Continue to grow BIA budget	BIA budget has been increasing but is below competitive areas in Ontario
Convene meeting with property owners and real estate professionals	There is a renewed effort for the BIA to take a leadership role
Incentives	The City of Hamilton's incentive toolbox is extensive and developers have availed themselves of incentives related to residential as well as some commercial programs
Maintain clean and safe programs	The Cleanliness and Security Taskforce along with the Alley projects have continued to increase safety and cleanliness aspects. A renewed emphasis on safety is noted by the membership as a priority
Gore Park Master Plan	The Gore Park redevelopment is almost complete. The next stage will be for the abutting private sector buildings to be redeveloped and leased



LRT	LRT is an on-going program and will be until there is a finalized contractor and a construction calendar submitted.
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11.0 Vision

Previous Vision

The previously articulated vision for Downtown Hamilton BIA was to focus on three key goals:

- Hospitality
- Neighbourhood
- Unique retail

The updated vision should be based on creating an 18/7 environment that is supportive of visitors' needs, is a draw in its own right, and is a complete neighbourhood for the growing local population. Downtown Hamilton will support a robust daytime activity through office workers, students, and other visitors throughout the day. An active night time economy based on workers staying late after work, local residents, regional residents, and arts and culture, entertainment, and sporting event attendees who want to be in an active urban environment. And an evolving weekend economy based on a growing residential sector as well as outside visitation for everything from running errands at the grocery store, to cafes, to activities and shopping to support their daily lives



12.0 Downtown Hamilton BIA Action Plan

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

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

Each action item includes the following elements:

- Specific task
- Measurement
- Action item
- Responsibility
- Timeframe

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

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



12.1 Organization

STRATEGIC GOAL

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

RATIONALE

- A financially dedicated organization committed to Downtown Hamilton BIA's boundaries is required to support the members and create an environment where it is possible for businesses to be successful

DESIRED RESULT

- Consistency of organizational leadership that members can rely on for advocacy, internal communications, marketing, and to facilitate economic development

HOW TO ACCOMPLISH

Overall, the Downtown Hamilton BIA is a well-organized group. The following chart highlights suggested general recommendations for the Downtown Hamilton BIA organization to consider on an ongoing basis.

Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Increase internal communications	<ul style="list-style-type: none"> • Commit to key deliverables such as monthly email newsletter, weekly email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only 	<ul style="list-style-type: none"> • Develop a calendar of communications correlated to different mediums • Ensure BIA database is current – if not, work with City to get contact information 	BIA Executive Director	Immediate and ongoing



<p>Ensure BIA organization is current with City required policies – social media and procurement</p>	<ul style="list-style-type: none"> • Number of policies in place and year they were last updated 	<ul style="list-style-type: none"> • Ensure BIA has updated social media and procurement policies • Review and update these and other policies on a regular basis 	<p>BIA</p>	<p>Immediate</p>
<p>Partnerships</p>	<ul style="list-style-type: none"> • Number of valuable partnerships • Review partnerships every six months to every year 	<ul style="list-style-type: none"> • Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA • Prioritize partnerships based on current and future impact to the BIA (Jackson Sq., Hamilton Place, Tourism Hamilton, International Village, etc.) 	<p>BIA</p>	<p>Ongoing</p>
<p>Review BIA boundaries</p>	<ul style="list-style-type: none"> • Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> • Every two years, review boundaries and determine if changes are merited 	<p>BIA potentially in coordination with City Urban Renewal</p>	<p>Ongoing</p>



		<ul style="list-style-type: none"> BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Downtown Hamilton BIA, are business competitive or complementary, and pros/cons on BIA levy 		
Change committee structure to Task Force structure	<ul style="list-style-type: none"> Number of task forces and completed items 	<ul style="list-style-type: none"> Develop short-term task forces that board members and members can work on for short durations to produce results 	BIA	Short Term
Focus AGM and other meetings on positive learnings	<ul style="list-style-type: none"> AGM participation and feedback process 	<ul style="list-style-type: none"> Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA Bring in speakers on topics of 	BIA	By next AGM



		relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc.		
Increase the BIA budget	<ul style="list-style-type: none"> • Monitor assessed values • Monitor commercial development • Monitor similar sized BIAs in Ontario 	<ul style="list-style-type: none"> • Budget should be increased in line with commercial development and commercial assessment changes • Consider increasing the budget to similar sized BIAs in Ontario 	BIA and City	One to two years
Review BIA brand in light of Downtown changes including increased residential density, an emerging local neighbourhood, LRT, and the changing office sector	<ul style="list-style-type: none"> • Review branding to ensure it is current 	<ul style="list-style-type: none"> • Formally review the Downtown Hamilton BIA brand to ensure it is relevant to the new realities of a changing Downtown Hamilton 	BIA	Two to three years



12.2 Economic Development

STRATEGIC GOALS

Downtown Hamilton BIA will provide an opportunity for:

- Retail and commercial businesses to continue to thrive and expand to ensure that the BIA area and the Downtown overall is an economically sustainable community (employment for local residents as well as regional residents and a fiscally sustainable tax base).
- Attract high-quality workforce to live and work in Downtown Hamilton.
- Nurture local entrepreneurs to start up and expand new businesses.
- Attract outside investment in terms of both retail and office.
- Provide opportunities for businesses to grow in place in the Downtown as they continue to evolve.

RATIONALE

- Allows for new business sectors to grow and take advantage of Downtown Hamilton attributes.
- Strengthens processes allowing Downtown Hamilton businesses to stay competitive and innovate.
- Increases real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of the Downtown Hamilton BIA.
- Creates a diversified economy.

DESIRED IMPACT

- Diversified retail and commercial economy in select growing and sustainable business sectors.
- Depth and specialization in each of those sectors so that they continue to grow and draw further investment.
- Enhanced regional draw capabilities including regional and tourist visitation, business meetings, conferences, and conventions, education-related and students, etc.
- Sufficient employment opportunities for local downtown residents (including youth, young professionals, families, active seniors, and empty nesters).
- Growing foundation of commercial assessment enabling Hamilton to provide high-quality services.



HOW IT GETS DONE

- The City of Hamilton and the BIA allows for business opportunities to grow through retention, expansion, and recruitment programs.
- To foster an economic climate that supports the economic health of existing businesses and encourages the location of new businesses that fit within the overall vision.
- Will be based on five key strategies:

Five Key Strategies

6. Identify both retail and commercial opportunities, gaps, and strengths to build upon
7. Define investor recruitment targets
8. Strengthen infrastructure
9. Review planning context
10. Make investment easier



Identify Opportunities, Gaps, Strengths to Build Upon

There are several sectors with good potential for future development and growth. We are suggesting that the City and the Downtown Hamilton BIA triage these potential opportunities and select one or two for initial focus and action.

Selection criteria should include:

- Local partner(s) active in the sector and interested in participating (time and resources) in its expansion.
Appropriate partners might be:
 - local businesses interested in their own expansion by increasing local critical mass in the industry, strengthening their supply chain and market for their services/products, building the local labour pool of specific skills, etc.
 - institutions such as the McMaster University, owners of cultural venues, major employers, major developers, Jackson Square, etc. who are interested in partnering
- Good regional growth prospects; this is best assessed at a fine-grained level since very narrow and specific industry niches often present the strongest growth opportunities
- Sector is aligned with Ontario's economic development priorities, RTO's priorities, offering opportunities for leveraging their resources and participating in joint initiatives.



Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Regional Hub	Finance, Insurance & Real Estate (FIRE), business services, government services, medical and non-profit head offices and agencies	<ul style="list-style-type: none"> • Build on an existing strength • Have in the past presented good candidates for downtown space • Develop in partnership with local landlords/developers; develop a target list of regional prospects and pitch Hamilton's quality of life and quality workforce living in and near Downtown, commitment to infrastructure development including LRT, walkable downtown, competitively priced available floor space and vacant lots, and local business testimonials and critical mass aspects
Education Centre	Support expansion of programming at McMaster Downtown campus locations and leverage its presence to attract other specialized post-secondary schools and research institutes Support student-led programs	<ul style="list-style-type: none"> • Build on existing strength • Work in partnership with McMaster and other colleges/schools in and near Downtown • Identify potential expansion opportunities and pitch Hamilton's lifestyle, walkable downtown, competitively priced available floor space and vacant lots, student infrastructure and testimonials
Incubator	Small-scale value-added local production: food, agriculture, artisan manufacturing; Retail distribution in Hamilton and Downtown Hamilton stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> • An underdeveloped resource which diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in the supportive ecosystem) • Develop in partnership with value-added agriculture businesses, community, artisans, existing micro-businesses, local institutions, steel industry, and with potential provincial support • Build a value-added agriculture-related program tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Hamilton Farmers Markets, co-tenancy in



	Description	Rationale and Tactics
		<p>stores, organizing stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.)</p> <ul style="list-style-type: none"> • Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts Council) to explore their needs and best practices and build strategy and ecosystem to support their growth. Tactics parallel those described above for food. • Start by identifying Hamilton residents currently making and selling artisan products – Etsy manufacturers • Encourage craft type markets
Digital and Creative	Creative industries - website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> • Prerequisite: high-speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity. • Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.
Arts & Culture	Performing and visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> • Leverage assets in the Downtown Hamilton BIA such as restaurants and cafes, Connaught, Lister Block, Gore Park, GO Station, new park on Rebecca St., and those nearby such as Theatre Aquarius, Hamilton Place, Art Gallery of Hamilton, Library, Jackson Square, etc. as venues for display and performance. • Partner with venues and local arts organizations. • Pursue two-stream strategy: 1. Nurture and develop opportunities for local artists and performers to earn income and gain exposure to broader audiences (tactics similar to those described for artisans); 2. Support enhanced programming, festivals and exhibits (temporary and



	Description	Rationale and Tactics
		<p>permanent) at venues. Include both locally based programming and attraction of touring groups/performers/exhibits and festivals.</p> <ul style="list-style-type: none"> • Synergy with Hamilton music strategy and tourism development. Build the reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community)
Tourism	Accommodation, festivals, sporting event/tournament attraction, shopping, arts and cultural programming, recreational opportunities, conventions, trade shows, business meetings.	<ul style="list-style-type: none"> • Build on strength of the Downtown food services appeal • Work with Tourism Hamilton to strengthen its capacity to strategically market Hamilton and Downtown as a destination. Stay true to the brand (See Section 10.5 below) • Leverage resources and expertise available through Ministry of Culture and Tourism and marketing avenues available through RTO and Tourism Hamilton. • Evaluate operation and services provided by Tourism Hamilton. Consider tactics for getting information about things to see and do; visitors, locals, new residents, workers, etc.. • Develop statistical package on current visitation for monitoring plus business attraction (e.g. there might be untapped potential for a downtown boutique hotel). • Work at developing synergy between the different activity zones. What can be offered to encourage cross-promotion? • Strategically invest in place making and wayfinding (see separate discussions). • Consider undertaking an event attraction strategy in partnership with benefiting venues. Define targets based on Hamilton's competitive assets (a sub-category of provincial trade shows, conventions, sporting events and/or festivals), prospect list and key messages and facts. It may be



	Description	Rationale and Tactics
		necessary to offer financial concessions or incentives depending on the competitive environment.
Film & TV Production	On-location shooting in Downtown Hamilton, supporting accommodation, food & Beverage, shopping, and associated support services	<ul style="list-style-type: none">• Leverage assets in heritage main street environments to build business for local accommodation, food & beverage, services and retail businesses and income for BIA and City (permit fees) and local residents and businesses (location rental, stipends to “extras”).• Increase working relationship with City of Hamilton film to evaluate the potential to increase on-location production activities in and around Downtown Hamilton. For example, add locations to Ontario and Hamilton location library and participate in hosting “Fam Tours”.• Cost/benefit analysis of setting up a film permitting service to minimize community disruption that can be associated with filming and generate revenue.



Key Retail Sector Opportunities

Our evaluation of Downtown Hamilton BIA and the greater Downtown shopping districts and consumer research suggests that the following types of stores and services offer good opportunities for location and expansion. It is suggested that these recruitment opportunities be pursued by the landlords and brokers and supported by the City of Hamilton Economic Development, Downtown Hamilton BIA, and the Chamber of Commerce. The City and the BIA can support their private sector recruitment activities by supplying consistent branding and key messages and helping to develop new marketing tools.

Each commercial district in and near Downtown Hamilton BIA has its own distinctive character and mix of stores which should be maintained and enhanced in the future. Research has shown that it is the number of competitive and complementary business districts near one another that actually re-enforces and makes them all stronger. Consumers want a range of choices. These districts work together to collectively attract shoppers, the majority of whom visit several different areas on the same trip and it is recommended that they be marketed and promoted collaboratively. However, the business recruitment targets and enhancement strategies for each district should be differentiated, as is summarized below:

King St. E.

Location: King St. E. of James St. to Mary St., north side of the street

Niche: Entertainment focused main street

Target Market: local Downtown workers and visitors as well as regional visitors, business meeting visitors, pass-by traffic (errands), arts/culture/entertainment/recreation visitors, local residents

Requirements for Success:

- Walkable street with wide sidewalks - (lighting, benches, tree canopy, banners, artwork, sidewalk widths, urban plazas, gateways)
- Entertainment oriented with bright lights, lit up buildings, artwork, gateways
- Places for ephemeral, constantly changing, performances, art, etc.
- Locations for pop up music venues both small and large
- Better facades, large windows, limited use of window barriers, ground level animation

Commercial Mix:

- Quality restaurants and cafes (breakfast, cafes/lunch, coffee/tea, and quick casual dinner) – high turnover (Bier Mkt, Hard Rock Café, South St. Burger, Korean BBQ)
- Night time economy restaurants, pubs, hangout places



- Leisure-oriented retail including sportswear, activewear, (e.g., specialized sporting goods store with a mini basketball area set up inside), book and music stores,
- Pharmacy including some grocery items
- Creative offices on upper levels
- Medical offices on upper levels
- Fitness, creation, dance, martial arts on upper levels
- Entertainment such as small movie house on upper levels

King William

Location: East of James St. N. to International Village

Niche: See and Be Seen Atmosphere

Target Markets: Daytime office workers and visitors, local residents, regional visitors, arts and entertainment visitors – related to those who want visibility

Requirements for Success:

- Create a two-sided retail street through infill redevelopment opportunities
- Allow for patio development with lighting and creative patio enclosures
- Upper levels used for creative offices that blend work and eating as well as those businesses that blur lines between office and retail (e.g., coffee shop that allows shared work environment)
- Other supporting industries such as barbershops that have a “see and be seen” atmosphere
- Add softer lighting that makes people look good, fairy lights, softer up lighting
- Quality streetscape materials
- Ensure sound building materials as well as measures to baffle sound that may come from the restaurants

Commercial Mix:

- Unique restaurants, cafes, coffee/tea, breweries
- Shared work and retail spaces
- Blurred retail categories and lifestyle concept stores, vintage stores
- Retail that has significant people gathering and social gathering opportunities (barber shops that have social gathering spaces such as alcohol, billiards, etc.)
- Entertainment
- Creative offices on upper levels



Restrictive Uses

- Keep the sizes of eating establishment to under 200 m² in general (don't want large nightclubs and large restaurants that overpower other eating establishments) and keep the size of dance floors or stages to a minimum within any eating establishment



James St. N. – Main St.

Location: King St. to Wilson St.

Niche: Transit Hub; Gateway to James St. N. – transition from the office core to the arts and entertainment district to the north

Target Markets: Office workers, local residents, arts and entertainment visitors, transitioning visitors from further north to the central core (and vice versa)

Requirements for Success:

- Flexible sidewalk that can be bumped out during weekends
- Currently, a single-sided retail street so each business must stand out
- Restaurants under 500 m²
- Emphasis on signage, retail entrances, ground floor retail heights that create an inviting atmosphere
- An urban plaza along James St. N. (at King William or Rebecca) to allow for a transition from the core to the retail district to the north
- Office workers on both sides of the street in upper levels
- Boutique hotel

Commercial Uses:

- Restaurants, pubs, cafes, coffee shops
- Health food supplements, pharmacy, drug store
- Shoe stores, footwear
- Quick and efficient retail goods and services
- Business associated with the Circular or Sharing Economy – vintage, antiques, rentals, etc.



John St. S.

Location: Main St. to Hunter St.

Niche: Gateway, Transit Hub

Target Markets: office workers, Transit visitors, local residents, regional pass by traffic

Requirements for Success:

- High visibility for businesses
- Ease of stopping

Commercial uses:

- Quick and easy food services -healthy, fast, quick casual
- Lunch and after dinner eating and drinking
- Business support retail and services
- Specialty food, greengrocer, pharmacy / drug store
- Medical and dental services
- Upper-level offices



Gore Park

Location: King St. E. south leg east of James St.

Niche: Pedestrian Mall

Target Markets: Local residents, workers, regional visitors, entertainment visitors

Requirements for Success:

- Clean and safe
- Patios that extend out towards the park space
- Force pedestrians within 8 m of the business entrance through the placement of art and other streetscaping elements

Commercial Uses:

- Quick casual cafes, restaurants, coffee shops
- Night time food services
- Games and cafes
- Specialty leisure retail (destination) – men's clothing and accessories

Restrictions: eating establishments should be under 500 m²

Economic Development Suggested Recommendations

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

		<ul style="list-style-type: none"> • Hamilton expatriates (“Come Back to Hamilton” campaign) • GTA residents • Independent and small chain franchises • Others 		
Strengthen infrastructure	<ul style="list-style-type: none"> • Business turnover decreased • New business openings 	<ul style="list-style-type: none"> • New streetscape plans • Investment in WiFi in Downtown • High-speed internet and broadband width • Parking strategy • Transit strategy • Incubators and a complete range of office tenancies 	<ul style="list-style-type: none"> • City and BIA 	Mid to Long Term
Make Investment easier	<ul style="list-style-type: none"> • New business openings • New mixed-use developments 	<ul style="list-style-type: none"> • Reduce costs, risks, and barriers to investment including • Competitive tax rates, development friendly approval processes, market current opportunities 	<ul style="list-style-type: none"> • City and BIA • BIA to educate themselves and attend training on development pro formas and industry terms to ensure the BIA understands key redevelopment opportunities 	<ul style="list-style-type: none"> • Medium Term



		<ul style="list-style-type: none">• Develop sector-specific recruitment materials• Review all incentives and marketing of incentives against the economic development plan• Increased residential and office mixed-use developments	<p>issues and opportunities</p> <ul style="list-style-type: none">• BIA can support development opportunities and commission economic impact studies that support redevelopment with public parking	
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12.3 Physical Improvements and Programs for Enjoyable Shopping

STRATEGIC GOAL

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

RATIONALE

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

DESIRED IMPACT

- Increased dwell time for visitors to stay longer, shop more and spend more
- Offers opportunities for people to meet, socialize, build community
- Creates an environment that attracts further investment

HOW TO ACCOMPLISH

Parking

- Develop a complete toolkit solution based on affecting supply, management, and marketing. This includes reviewing the number of publicly available spaces.
- Placement of maps and directional signage at the entrance to central lots
- Marketing program to remind visitors to park in long-term lots for longer stays
- Ensure public parking is considered as part of every mixed-use development (whether it is ultimately included or not is subject to the evaluation)
- Use digital media combined with parking technology (mobile pay programs, online permit programming) to address parking needs of visitors, workers, etc.



Hours of Operation

- Create a carrot and stick incentive program to encourage Downtown Hamilton to be an 18/7 active environment with a strong daytime and night time economy.

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

- All streetscape programs should address creating more mini urban plazas beyond Gore Park throughout Downtown Hamilton for people gathering, events, and retail and commercial businesses.

Patios

- The patio program from the City of Hamilton is still evolving. The Downtown Hamilton BIA can assess its relevance and make need changes to the program to suit their businesses' needs.

Multifunctional Street Art and Amenity

- Items such as bike racks, protective gates around tree trunks, benches, street lamps etc. can all include an element of art into the design. The more that placemaking elements have multiple functions, the better.

Proper Use of Lighting

- Safety is paramount in terms of any discussion around lighting. For Downtown Hamilton BIA, lighting should reflect the character of each of the street segments (i.e., King William will be softer lighting reflecting the “see and be seen” atmosphere but King St. E. will be more dynamic and entertainment focused lighting reflecting the hub of activity and evolving nature of that section of the BIA.

Physical Improvement Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Any streetscape plans must be vetted through the lens of economic development	<ul style="list-style-type: none"> • Required step in any streetscape changes 	<ul style="list-style-type: none"> • Develop a protocol whereby streetscape changes are vetted through the lens of potential positive impacts on area 	<ul style="list-style-type: none"> • City and BIA 	<ul style="list-style-type: none"> • Immediate to Long-Term (based on current LRT needs)

		businesses including trade-offs		
Review parking needs in light redevelopment, loss of surface parking lots, maintaining or growing existing supply, and increased use of technology	<ul style="list-style-type: none"> • Measure the effect of losing parking spaces on office sector needs, visitation • How many residents have and use the future digital payment app (to be rolled out) 	<ul style="list-style-type: none"> • As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones • Look at ways to partner with parking to share information on digital parking app visitors 	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> • Patio administration program for Downtown Hamilton BIA is completed • BIA should meet with Parking and Transportation on an annual basis to review changes to parking and loading
Review physical and digital wayfinding and digital parking apps (to be rolled out by the City)	<ul style="list-style-type: none"> • Increased visitation • Reduced wayfinding complaints • 	<ul style="list-style-type: none"> • Review with City location of wayfinding signage and determine ways to increase signage to Downtown • Constantly update any digital wayfinding elements 	<ul style="list-style-type: none"> • BIA and City 	<ul style="list-style-type: none"> • Review annually
Review lighting in terms of safety and creating an overall experience,	<ul style="list-style-type: none"> • Conduct a study 	<ul style="list-style-type: none"> • Work with City of lighting study to match goals and objectives of the 	BIA and City of Hamilton	One year



especially as the night time economy increases		BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy		
Continue to review other programs such as Clean and Safe, Alleyways, Gore Park, and other programs associated with the public realm			BIA and City	Ongoing



12.4 Marketing

CONTEXT

- Current branding positions Downtown Hamilton BIA well for key attributes related to the “Core” messaging.

STRATEGIES

- Updates to the brand should be reviewed within a two to three year time period to ensure that the changing nature of the Downtown including residential intensification, office worker changes, LRT, etc. are reflected in the brand positioning.
- Continue to update the BIA's calendar of events program.
- Use the brand as an investor attraction piece.

RATIONALE

- Ensure that changes are reflected in the positioning as the Downtown becomes more neighbourhood oriented
- Ensure the brand and marketing continue to address social issues such as real and perceived safety and cleanliness issues

DESIRED IMPACT

- One consistent, focused brand story that will attract both investors and regional visitation to all of the commercial and retail areas of the City.

HOW IT GETS DONE

Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Review calendar of events and promotions calendar	<ul style="list-style-type: none"> Assess based on markets targeted and success of attracting that segment Cost to benefit analysis 	<ul style="list-style-type: none"> Complete an assessment of the marketing activities from the previous year – determine what was successful and what wasn't and why based on evaluation criteria Assess what has changed in the Downtown and City that influences your potential participants and visitors and ultimately your plans going forward 	<ul style="list-style-type: none"> BIA 	<ul style="list-style-type: none"> Ongoing
Review vision, mission statement, and brand	<ul style="list-style-type: none"> How many members are aware of these statements and positionings 	<ul style="list-style-type: none"> Update on a continual basis to reflect changes in the BIA Review overall brand positioning in the context of a high-density downtown 	<ul style="list-style-type: none"> BIA 	<ul style="list-style-type: none"> Ongoing



13.0 Trends

Trends are based on five overarching themes:

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

RETAILER AND COMMERCIAL BUSINESS TRENDS

Omni-channel

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

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

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

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



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

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

Smaller Retail Formats

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

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

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

Mobile

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

Solid Retail Principles Still are Key

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



Technology Driven Innovation

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

- Sensor-based technology
- Big data
- Online

Sensor-Based Technology

This includes all aspects of sensors used to make people's lives better. It includes autonomous driving vehicles, refrigerators that tell the household when they are low on grocery items, beacons on the street that notify potential customers that their favourite hot latte would be available for them at the next store in 2 minutes if they just push the buy button on their smartphone 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 even before they know they want it.

Online

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

FOOD SERVICE TRENDS

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



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

Examples of Neighbourhood Food Driven Successful Concepts

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

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

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

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



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

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



Examples of Hybrid Concepts – Blended formats

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

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

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

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

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



CONSUMERS CHANGES

Buy Low Buy High

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

Food Shopping Throughout the Week

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

Demographics Are Destiny

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

Mediocrity Won't Cut It

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

ORGANIZATION AND GOVERNANCE

Leadership is King

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



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

Capacity Building and Return on Investment of BIAs in Their Community

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

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



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

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

Determining Issues That are Symptoms of Greater Problems

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



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

PHYSICAL DESIGN

Universal Principles of Good Physical Design

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

1. Safety

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

2. Cleanliness

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

Length of the Main Street Area

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



Streetscape

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

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

Signage

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

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

Urban Plazas

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

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



Useable Outdoor Space

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

Showcase windows

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

Loading access

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

Garbage collection

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

Access/egress

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

Attractiveness

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



14.0 Planning Context – Downtown Hamilton BIA

It should be noted that the summary is provided for the purposes of general information only. For example, the many property-specific exceptions to the general provisions are not included. Anyone wanting to know the detailed regulations impacting the development of a specific property should contact the City of Hamilton before proceeding with planning building alterations, new development, leasing or purchasing property, etc. Regarding the status of any regulation (i.e., have they been appealed to the Ontario Municipal Board or the Local Planning Appeal Tribunal), readers of this report should also contact the City of Hamilton for this information.

1. Introduction

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

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

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

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

When a new regulation comes into effect after a property has been developed, the existing use and structure is allowed to continue to operate even if it does not comply with the new regulations (called a "legal non-conforming use"). However, it is required to comply if redeveloped. The Plan and Zoning By-law recognizes many existing uses that don't conform to the new policies and regulations through site-specific exceptions so that they can avoid "non-conforming" status and expand and alter their buildings without additional review (for example, existing drive-through businesses might be given site-specific exceptions in D2 zones so that can alter their buildings and sell to other similar operators).



2. Official Plan and Zoning By-law Designations for Downtown Hamilton BIA

The planning context for the Downtown Hamilton BIA is established by the Downtown Hamilton Secondary Plan. While the City of Hamilton Council did approve a new Secondary Plan in May 2018, it has been appealed to the Local Planning Appeal Tribunal (LPAT).

The Secondary Plan designates the Downtown Hamilton BIA as a “Downtown Mixed-Use Area”. The frontages on King Street East, James Street and King William Street also are designated “Pedestrian Focus Streets”. The Zoning By-law implements the Plan’s policies by designating the “Pedestrian Focus Streets” D2 and the remainder of the BIA D1.

The portion of the BIA fronting on King Street, Hughson Street, John St. South, King William Street and James Street North also is designated a Heritage Character Zone.

The general objective in the Downtown Mixed-Use Area is to maintain its key role as the governmental, institutional, educational, cultural, and residential centre of the City. The commercial and mixed-use policies of the Downtown Hamilton Secondary Plan are intended to support intensive, urban-scale commercial development. The principles include using public realm improvements as a catalyst for revitalization, and many of the policies focus on increasing amenities and safety for pedestrians and cycling, as well as on improving streetscaping and park space. A new park is proposed in the BIA on the southeast corner of Rebecca and John Streets (currently a surface parking lot). The proposed LRT will follow King Street with stops at James and Mary Streets. This will significantly increase the BIA’s transit accessibility to the surrounding region.

The land use, built form and parking requirements applicable throughout the area and in the Pedestrian Focused Areas and Heritage Conservation Zone are outlined below.

Permitted and Restricted Land Uses

A wide range of commercial, institutional and residential uses are permitted in the Downtown Mixed Uses and Areas and by D1 Zoning with the following exceptions:

- Motor vehicle dealerships, gas bars, service stations, car washing establishments drive-through businesses and dry cleaning plants are not permitted;
- Vehicle rental businesses must be fully enclosed within a building;



- Amusement arcades and garden centres are only permitted as accessory uses (i.e. another permitted activity such as a grocery store or restaurant is the predominant use);
- Microbreweries must be no larger than 700 square metres.
- New commercial parking structures must be fully enclosed within a building and the ground floor must be used for other permitted uses.

D2 Zoning places additional limitations on the following uses in Pedestrian Focus Streets (properties fronting on James, King or King William Streets):

- Dwelling units, day nurseries, and places of worship can't locate on the ground floor;
- Vehicle rental businesses are not permitted.

Building Heights

The Zoning By-law specifies a minimum height of 7.5 metres (2 storeys) in D1 districts and 11 metres (3 storeys) in D2 districts (Pedestrian Focused areas - properties fronting on James, King or King William Streets). The maximum heights vary considerably from 22 to 127 metres (detailed on map in Schedule F of the Zoning By-law). Both the new zoning bylaw and the recently adopted changes to the Official Plan have been appealed to the LPAT.

The Secondary Plan establishes policies to be considered when reviewing applications for taller buildings than are permitted by the Zoning By-law (Section 6.1.4.10). These include ensuring that no buildings are taller than the Niagara Escarpment, avoiding adverse impacts from shadowing and wind tunnels, and general sensitivity to the character of the surrounding district and neighbourhoods. The Plan permits heights of up to 30 storeys in much of the BIA and to as few as 3 storeys on the south side of King Street opposite Gore Park (detailed on Map B.6.1).

Section 6.1.4.13 through 17 of the Downtown Secondary Plan provides guidelines for approving the development of Tall Buildings – defined as structures higher than 11 stories. It is noted that not all sites are appropriate for tall buildings. The use of additional setbacks and step backs above the third floor may be required to mitigate wind impacts and shadowing and to provide an acceptable transition to adjacent low rise and mid-rise buildings, open space and the public realm. Proponents of tall buildings are required to provide information about the likely impact of their development by undertaking a number of special studies (listed in Section 6.1.4.17(e)). Buildings with more than 12 storeys will be required to provide community benefits through Section 37 of the Planning Act. This could include items such as community facilities and affordable housing.

Built-form and Design

In all Downtown Mixed-Use Areas:



- There are no minimum building setbacks;
- Maximum setbacks are 2 metres for the portion of the building below 11 metres (approximately 3 storeys). As noted above, towers can be set back further than 2 metres above an 11 metre high podium);
- New buildings must have ground floor facades at least equal to 75% of the lot width, and on corner lots at least 50% of the combined lot widths;
- Parking or aisles/stacking lanes are not permitted between the building façade and the sidewalk;
- Access to buildings is to be at the street level. There must be at least 1 principal entrance on the ground floor façade in new buildings. Ground floor facades shall have doors and windows open to the street.

The design vision in Pedestrian Focus Streets is to complete the street wall and provide an uninterrupted building line at the street level through infill and redevelopment. Policies to achieve this goal are set out in Section 6.1.7.2 of the Plan:

- the height of new buildings and additions should be consistent with the traditional street wall height at the street line;
- taller building masses should be sufficiently stepped back from the street to avoid interference with the perceived massing of the street as a low to midrise corridor;
- the articulation of façades should retain a similar scale as the street front shops in its surroundings and should complement the traditional patterns of fenestration in adjacent buildings;
- limited articulation of the front façades may be permitted in order to create sheltered areas at ground level or to allow for the incorporation of architectural design elements provided that the sense of enclosure is maintained and that the articulation does not detract from the retention of the traditional building line;
- the ground floor frontage should be clearly articulated in the massing of the façade, substantially glazed, with generous floor-to-floor heights and designed to accommodate signage;
- where possible, buildings shall be constructed to the side lot line in order to maintain the sense of enclosure and avoid gaps in the streetscape.



Parking Requirements

Downtown Hamilton's parking requirements for new development or change of use are quite detailed and specific for different uses (See Section 5.6(a) of By-law 05-200 as amended by Clause 4.1 the Secondary Plan's Zoning By-law Amendment). To provide a few examples:

- Residential Uses must provide a minimum of 0.3 spaces and a maximum of 1.25 spaces per unit,
- Offices must provide 1 space per 50 m² above 450 m² of development (no spaces are required for less than 450 m²),
- Parking requirements are not specified for retail stores, restaurants and most types of personal services.

Bicycle parking is required for new development.

- Most commercial uses must provide 5 short-term bicycle parking spaces,
- Multi-unit residential development must provide 0.5 long-term spaces per unit,
- Commercial development between 450 and 1000 m² must provide 2 spaces per unit (the requirement increases for larger developments).

Heritage Conservation

Additional built form requirements are included in the BIA's Heritage Character Zone (properties fronting on King Street, Hughson Street, John St. South, King William Street and James Street North) to ensure that new development is sympathetic to the area's early 20th Century commercial architectural heritage:

- at least 60% of the ground floor façade must be windows and doors,
- between 25% and 40% of the second and third-floor façade must be windows,
- The ground floor storey height must be between 3.6 and 4.5 metres; the second and third-floor heights must be between 3 and 4 metres,
- The exterior building cladding for the first three storeys must be a maximum of two of brick, concrete panels, stone (including veneers and artificial stone) stucco and metal panels (but not aluminum siding).



Mobility and Traditional Streets

Section 6.1.13.11 of the Secondary Plan differentiates between Mobility Streets and Traditional Streets. The City intends to complete Street Master Plans for all of the categorized streets to guide public realm improvements.

Mobility Streets are intended to perform key public transit and vehicular traffic roles in moving people and goods throughout Hamilton. Traditional Streets are intended to primarily accommodate pedestrians and cyclists as well as local traffic and transit. Broad design guidelines are outlined for each of the categorized streets and Table B6.1.17.1 and 2. The guidelines for the streets within the BIA which are summarized below.

Street & Function	Design Objectives
Mobility Streets	
Hunter St.	<u>See completed Master Plan for detail:</u> <ul style="list-style-type: none"> • Improve pedestrian and cycling environment and connections to Gore Park • Maintain and retain landscaped area between James and Catharine Streets
James St.	<u>See completed Master Plan for detail:</u> <ul style="list-style-type: none"> • Widen public sidewalks where feasible • Provide additional on-street parking where feasible • Protect views southward toward the Escarpment • Strengthen pedestrian linkages to E-W streets and transit hubs
John St.	<u>See completed Master Plan for detail:</u> <ul style="list-style-type: none"> • Widen public sidewalks where feasible • Establish safe pedestrian environment with appropriate separation from vehicles • Better balance of pedestrian, cycle & transit needs with vehicular needs
King St.	<ul style="list-style-type: none"> • Widen public sidewalks where feasible • Provide additional on-street parking where feasible • Strengthen pedestrian and cycling linkages • Provide seating at transit stations where space permits
Main St.	<ul style="list-style-type: none"> • Widen public sidewalks where feasible • Recognize through traffic needs



	<ul style="list-style-type: none">• Improve pedestrian/vehicle separation through wider sidewalks, tree plantings, and parallel parking• Strengthen pedestrian and cycling linkages• Provide additional on-street parking where feasible
Traditional Streets	
Catharine Street	<ul style="list-style-type: none">• Improve vehicular/pedestrian and cycling separation• Provide improved pedestrian and cycling amenities
Hughson St.	<p><u>See completed Master Plan for detail:</u></p> <ul style="list-style-type: none">• Protect view from Go Centre to Gore Park• Create special pedestrian crossing at Hunter St.• Introduce pedestrian and cycling amenities• New development to provide direct at-grade access to the street• No blank facades along the street
Jackson Street	<ul style="list-style-type: none">• Recreate public street between Bay and MacNab (west of BIA)
King William St.	<p><u>See completed Master Plan for detail:</u></p> <ul style="list-style-type: none">• Don't accommodate surface parking• Introduce pedestrian amenities• Permanent and temporary public art and community art should be encouraged in keeping with the precedent set by the Art Walk Program

On Street Patio Program

Restaurants in BIAs can apply to the City for permits to locate outdoor patios in on-street parking spaces from May 1 to October 31 each year. 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.