



Downtown Dundas BIA
Commercial Market Assessment Update

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1.0 Introduction

360 Collective was retained by the City of Hamilton (City) and Downtown Dundas Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of Downtown Dundas 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, and City staff and councillors
- Trade area review including visitor profile using cell phone visitor data
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and reviewed with BIA members at an open workshop. At this BIA member workshop, the team confirmed the data, determined if there were gaps in the analysis, and helped to develop a vision and action plan for the BIA and City with which to move forward. The complete report is included in this document.

Downtown Dundas BIA





2.0 Visitors to Downtown Dundas BIA

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

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

2.1 Vehicular and Pedestrian Movement Along King St. in Downtown Dundas

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

Intersection	Date	7-hour Vehicular Count	7-Hour Pedestrian Count	8-hour Vehicular Count	8-Hour Pedestrian Count
King St. and Main St./Cross St.	Wed. Jun. 8 2016	6,201	644	7,308	644
King St. and Ogilvie St.**	Tues. Mar. 31 2015	6,475	837	7,271	922
King St. and Sydenham St.	Thur. Oct. 17 2013	8,862	1,260	n/a	n/a
King St. and John St.	Mon. May 12 2014	11,073	1,026**	n/a	n/a

Source: City of Hamilton

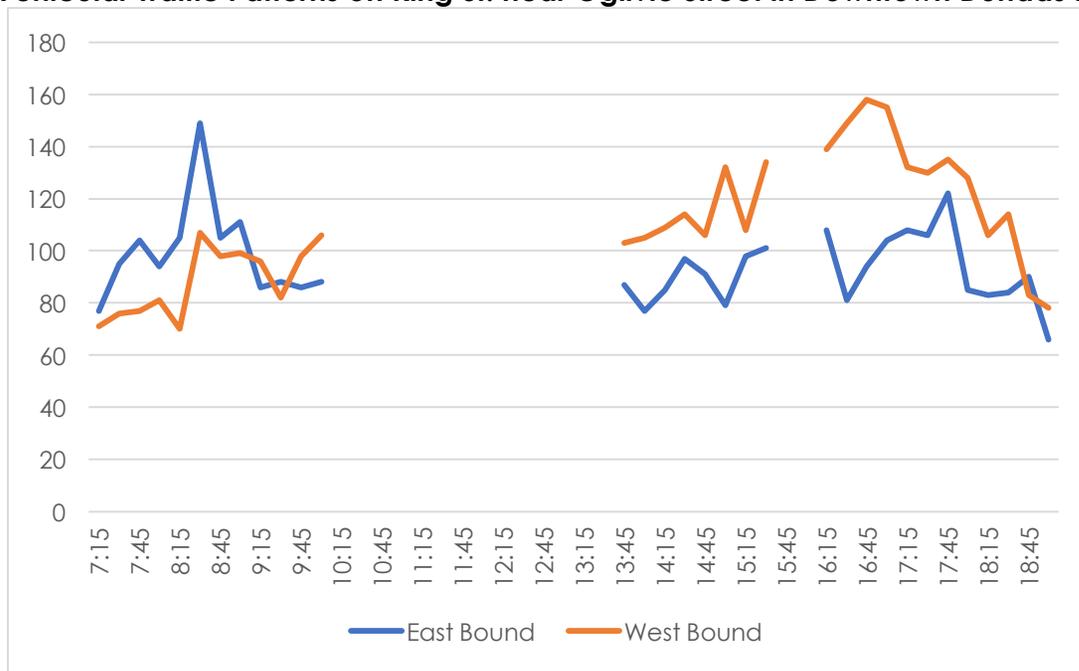
*Note that updated 8 hour counts are not available for King and Sydenham or King and John.

** King and John and King and Ogilvie are a T shaped intersections resulting in an undercount for pedestrian traffic for the north side of the intersection.

Focusing on movement directly on King St. the following graph illustrates vehicular traffic throughout the day at King St. near Ogilvie St.



Vehicular Traffic Patterns on King St. near Ogilvie Street in Downtown Dundas BIA



Source: City of Hamilton

Findings for King St.

- There is typical east bound spike in traffic moving towards Hamilton and Burlington/Toronto in the morning and the reverse spike west bound in the late afternoon/early evening for the commute home.
- In the early afternoon, west bound traffic is slightly higher than east bound.
- During most of the day, traffic fluctuates between 80 to 120 vehicles per 15-minute interval in each direction (320 to 480/hour)
- The early evening traffic is sustained until 19:00 (7:00 pm) as the evening commute is combined with some restaurant bound traffic.
- By 19:00 (7:00 pm) vehicular traffic drops off below the normal flow experienced during the day.



Implications for Downtown Dundas BIA

- Accessible parking on the north side of King St. in Downtown Dundas is essential to encourage the late afternoon/early evening commuters to stop and pick up their errands, food for dinner, home meal replacement items, etc.
- Encourage stores to stay open later to take advantage of the early evening movement occurring in Downtown particularly food oriented businesses.



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
2008	186	\$155,396.95	\$835.47
2009	187	\$164,689.97	\$880.70
2010	185*	\$167,758.97	\$906.81
2011	180	\$178,471.22	\$991.51
2012	180	\$184,265.91	\$1,023.70
2013	186	\$181,092.23	\$973.61
2014	186	\$191,530.19	\$1,029.73
2015	186	\$189,966.57	\$1,021.33

Source: City of Hamilton

*reflects an increase in parking per meter from \$0.85 to \$1.00 in 2010

Findings

- There is free parking on Saturdays and Sundays.
- Parking revenue per meter can be used as a proxy for visitation. There has been an increase in visitation from 2010 to 2012.
- There was a modest dip in 2013 (which may have been weather related).
- Since 2014, parking revenue per meter has remained relatively constant.
- On average, the on-street parking is used 3.9 hours per weekday excluding for free weekends. However, as noted it is higher than in 2010.
- Even accounting for the price change in 2010, per meter usage has increased for on-street parking in the BIA in 2012 and has been sustained to 2015.

Implications for Downtown Dundas BIA

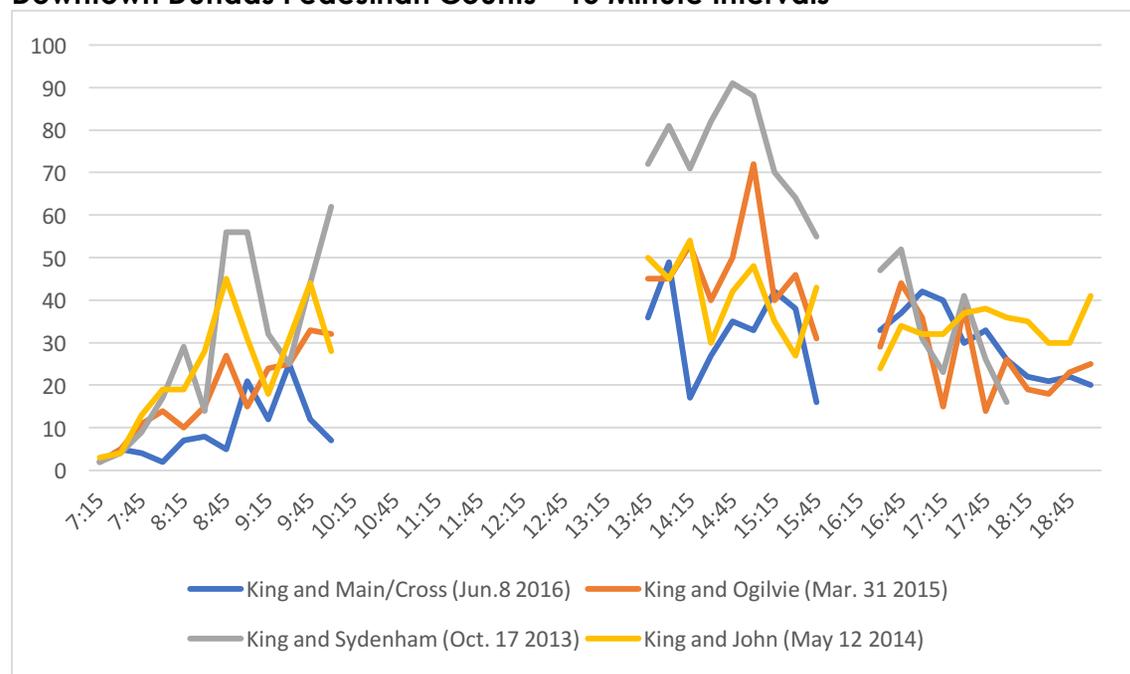
- Downtown Dundas businesses rely on a combination of local residents and regional visitation.
- Regional visitors should be encouraged to use the long-term lots located behind the businesses.
- This would allow the on-street parking to be freed up for local residents to use for quick errands.



2.3 Pedestrian Traffic

Average pedestrian traffic at the four major intersections in Downtown Dundas varies with King St. and Sydenham Rd. having the highest early afternoon volume. As noted, King and John and King and Ogilvie are undercounted due to the configuration of the T-shaped intersection.

Downtown Dundas Pedestrian Counts – 15 Minute Intervals



Source: City of Hamilton



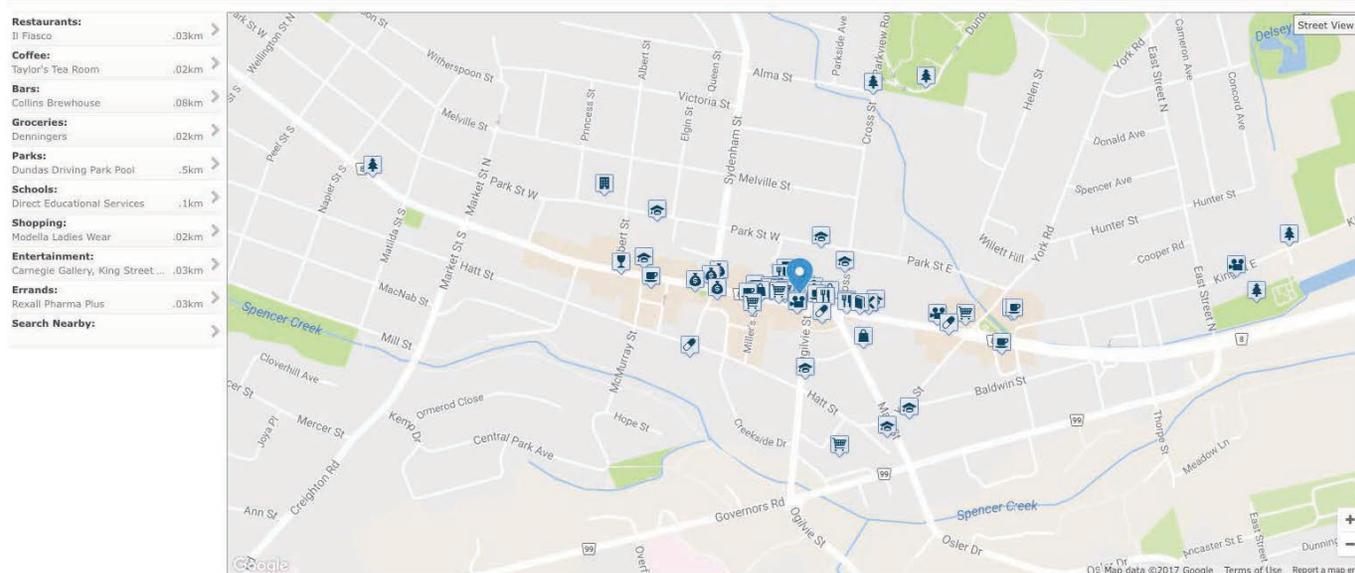
Findings

- There are small early morning spikes in pedestrian traffic as people travel to work. However, those same spikes are not noticeable in the later afternoon/early evening for the reverse home commuters.
- King St. and Sydenham Rd. has the highest pedestrian volume and is the reason that four banks are located at that intersection (highest visibility corner).
- It is interesting to note that King St. and John St. maintains average pedestrian volume throughout the day and in part may be due to the Shoppers Drug Mart and local errand activity. Pedestrian traffic is sustained past 7:00 pm at King St. and John St. (as noted, this intersection is undercounted by the City implying traffic would be higher). Interviewees noted the increased traffic and business occurring west of Sydenham Rd. in the Downtown.
- There is a spike in pedestrian traffic when schools let out in the mid afternoon at 3:00 pm.
- The count at King St. and Sydenham Rd. is from 2013 and should be updated by the City of Hamilton.
- According to Walk Score, the address 27 King St., has a Walk Score of 95 and a Transit Score of 46. Downtown Dundas achieves a very high Walk Score because it is very accessible to a wide range of goods, services (grocery, libraries, arenas, cafes and restaurants, other shopping, parks, schools, etc.), and activities by foot. However, it is more difficult to access activities via transit.



Downtown Dundas Walk Score – Nearby Amenities

What's Nearby



Implications for Downtown Dundas BIA

- Businesses need to adjust to when there are pedestrian spikes. This includes cafes opening during the early morning commute, adjusting to the early afternoon spike when schools let out, and staying open longer in the evening to take advantage of the traffic that extends past the 6:00 pm time frame.
- The refocus on the west of Sydenham Rd. area is good for the Downtown to create greater flow throughout the whole area.



3.0 Trade Area Analysis

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

The trade area review has been supplemented with a review of a year-long visitation sample based on cell phone data (November 2015 to November 2016) that correlates postal code data for visitors in the BIA who have one of the company's registered apps and is in the BIA for a minimum of ten minutes.

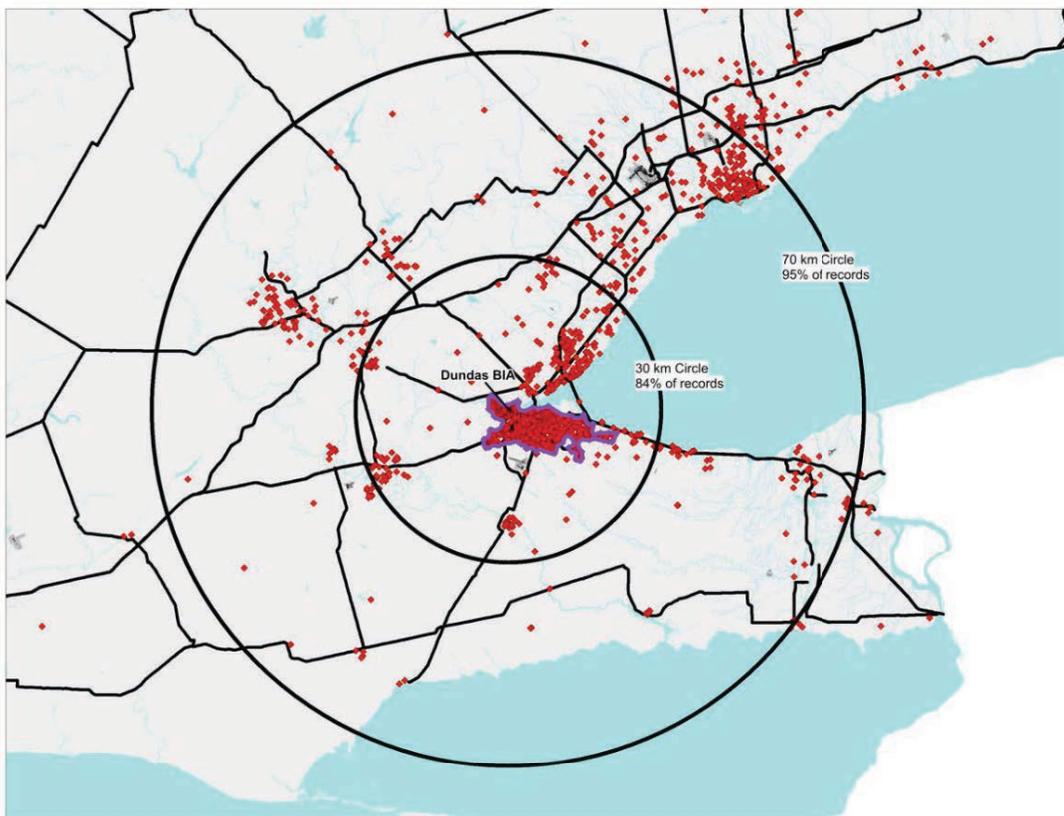


3.1 Cell Phone Data

- Cell phone visitor ping data was collected from November 2015 to November 2016 (one year) based on visitors that were in Downtown Dundas BIA.
- The data was supplied by Uber Media. (not associated with the driving company). Their affiliate, UberRetail, took the data they collected and converted it into location data. Then it went to a company called BI Spatial that cleaned the data further, adjusting the time stamps to localized dates and times and adding the postal code.
- The data represented a sample of visitors to Downtown Dundas. The analysis combined with other elements such as observational data, key person interviews, trade area analysis and competitive positioning re-enforced the overall findings.
- The visitor had to spend more than 10 minutes in the BIA. As a result, commuters and flow-through vehicular traffic were excluded.
- In total, there were 8,277 total visits from the sample of visitors excluding frequent visitors that may include residents, business owners, and staff. Within that sample, 2,767 were unique visitors. The average number of visits over the course of one year was 3.0. This includes a combination of very frequent as well as infrequent specialty visitors.
- The range of home postal codes for the ping data was very extensive across Canada including Victoria to Newfoundland but is concentrated in Southwestern Ontario (note only Canadian visitation data is available despite other nationalities visiting the area).
- This was an early testing stage with Downtown Dundas BIA as well as the four other BIAs in Hamilton that were being reviewed at the same time. The process revealed that the cell phone ping data matches well against the visitor profiles and tended to be an accurate portrayal. As with any sample, it was not 100% of the population, but when this data was combined with key person interviews, observational data, trade area analysis it did tend to re-enforce common findings.



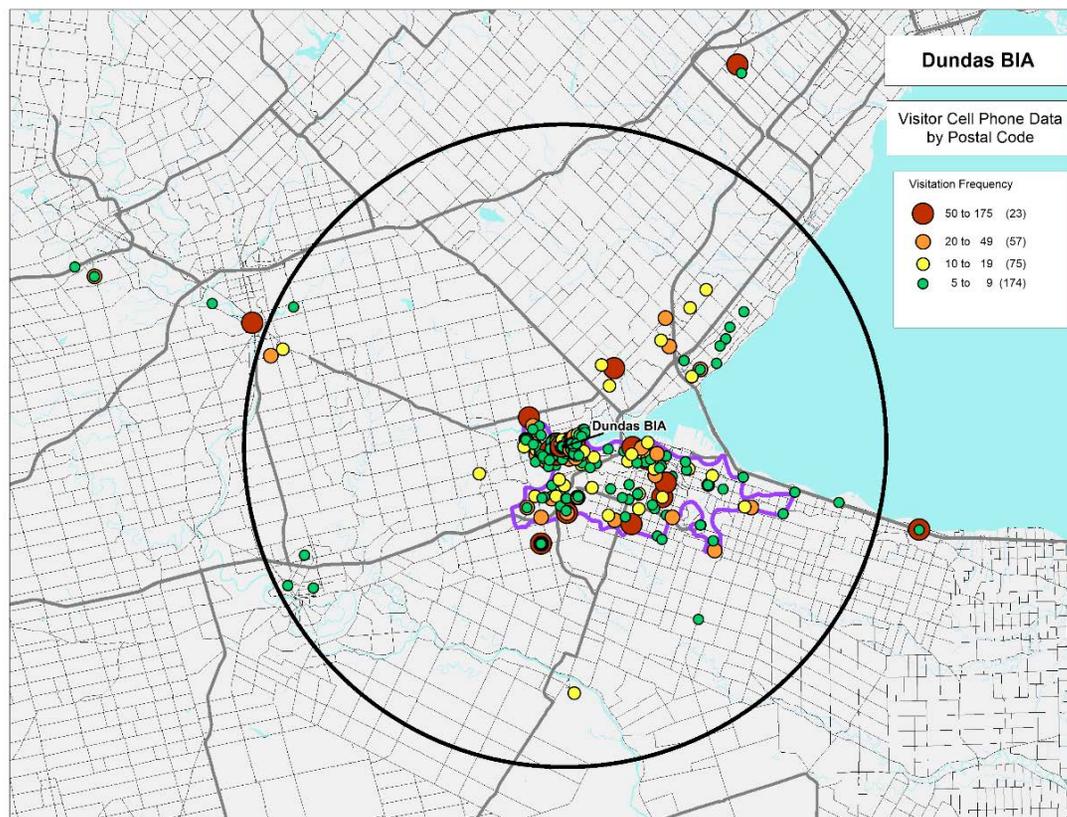
Downtown Dundas BIA Visitor Cell Phone Corresponding Postal Codes – November 2015 to November 2016



Source: GeoMarketing Solutions



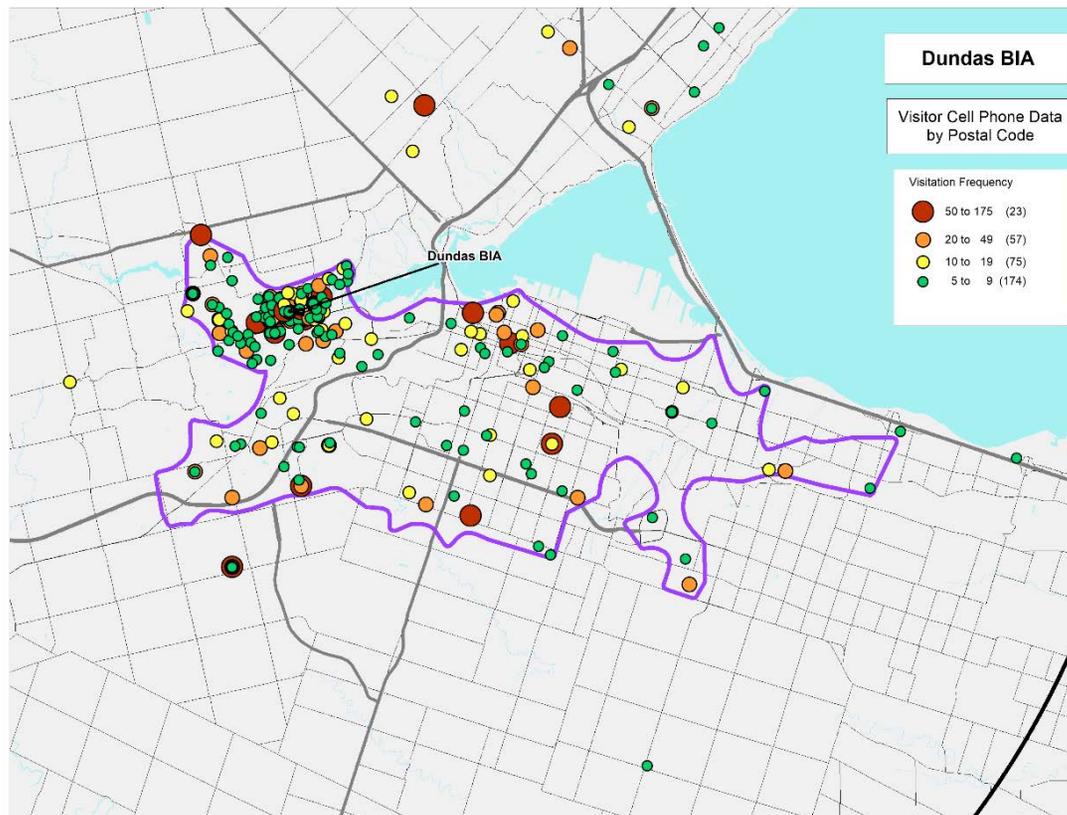
Downtown Dundas BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016



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



Downtown Dundas BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016, Zoomed In



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



Downtown Dundas BIA Sample Visitation Frequency – November 2015 to November 2016

	Number of Visitors	Average Distance Travelled	Average Household Income	Median Age	% Some University or Higher
Dundas Trade Area Demographics			\$110,641	47.9	40.7
Visitation Frequency					
Frequent Visitors (100 + Visits)	7	12.56	\$99,747	42.43	27.80
All Visitors Less Frequent	2,767	24.28	\$113,551	43.19	33.96
1 Visit	1,824	28.25	\$111,720	42.18	33.83
2 to 5 Visits	680	16.24	\$118,313	44.58	34.83
6 to 12 Visits	146	20.68	\$121,843	45.68	34.00
13 to 24 Visits	63	16.03	\$102,774	46.43	30.71
25 to 49 Visits	38	10.12	\$111,947	46.54	31.76
50 to 99 Visits	16	11.33	\$86,881	56.40	29.07
Weekends					
All Saturday	803	24.16	\$114,588	44.26	33.92
All Sunday	629	25.50	\$116,494	43.97	35.36
Time of Day					
All 5 pm to 11 pm	1,264	22.60	\$113,125	44.00	33.66
Events					
Buskerfest Visitors	92	13.68	\$105,142	43.88	31.35
Cactus Visitors	82	21.70	\$101,149	42.50	31.46
Visited Buskerfest and Visited Dundas Afterwards	42	7.66	\$109,932	48.89	27.97
Visited Cactus and Visited Dundas Afterwards	27	8.99	\$97,484	43.07	27.37
Visited Buskerfest and Did Not Visit Dundas Afterwards	50	18.74	\$101,350	39.91	34.03
Visited Cactus and Did Not Visit Dundas Afterwards	55	27.94	\$103,134	42.20	33.67
Farmers' Market					
Thursday June 9 to Oct 27 3 pm to 7 pm	135	14.98	\$122,355	44.56	32.69
Comparison of Farmers' Market Day to Others					
Mondays between June 9 to Oct 27 3 pm to 7 pm	119	17.90	\$109,101	44.13	32.32
Tuesdays between June 9 to Oct 27 3 pm to 7 pm	114	20.52	\$109,540	44.19	31.90



Wednesdays between June 9 to Oct 27 3 pm to 7 pm	143	19.90	\$119,760	45.38	32.69
Fridays between June 9 to Oct 27 3 pm to 7 pm	133	13.31	\$112,217	45.29	32.57
Saturdays between June 9 to Oct 27 3 pm to 7 pm	132	21.74	\$111,048	44.91	32.93
Sundays between June 9 to Oct 27 3 pm to 7 pm	111	30.74	\$95,060	44.59	34.86

Source: Geomarketing Solutions

Findings

- Downtown Dundas draws heavily from the Dundas area. In addition, there is frequent regional visitation from Ancaster, North Waterfront, and East Mountain areas of Hamilton as well as within 30 km such as Burlington, Cambridge, Mississauga, and Grimsby.
- The infrequent regional visitors have high household income and relatively high proportion have a university degree. In addition, they tend to be younger than other visitors but overall these visitors still skew towards an older generation.
- Those who visit 6 to 12 times per year are the most lucrative for Downtown Dundas. They account for the highest household income of all visitors and a high proportion have a university degree.
- Both Saturday and Sunday attract regional visitors with high household incomes and a high proportion of university educated visitors. Sunday visitors have slightly higher household incomes than the Saturday visitors as well as a slightly younger audience.
- Focusing on the evening traffic from 5 pm to 10 pm illustrates that these visitors tend to be regionally based, have moderate to high household income and have a high proportion of university educated visitors.
- Those in Downtown Dundas during the Dundas Farmers' Market tend to be both locally and regionally based and have very high household income. The average household income of people in Downtown Dundas during the Farmers' Market is higher than any other day for the same time period. The market enhances and draws a unique crowd of higher income visitors to the Downtown.
- Buskerfest tends to attract a more local audience. Household incomes are moderate to high and the visitor tends to be well educated.
- Cactus Festival attracts a regional visitor with a younger median age and moderate household income.
- Those who visited Buskerfest and then returned to Downtown Dundas tended to have higher household incomes compared to the average event attendee.
- For Cactus Festival, the returnees tended to have lower household income.
- Those who attended the events and returned, increased their visitation by 1.5 times.



Events

	% Who Did This Activity	Average Number of Trips
Buskerfest		
Had been to Downtown Dundas in previous 6.5 months prior to Buskerfest	58%	3.75
Had not been to Downtown Dundas in previous 6.5 months prior to Buskerfest and Returned	5%	2.80
Had not been to Downtown Dundas in previous 6.5 months prior to Buskerfest and did not return	38%	0.00
Cactus Festival		
Had been to Downtown Dundas in previous 9 months prior to Cactus Festival	49%	2.21
Had not been to Downtown Dundas in previous 9 months prior to Cactus Festival and Returned	6%	3.21
Had not been to Downtown Dundas in previous 9 months prior to Cactus Festival and did not return	44%	0.00

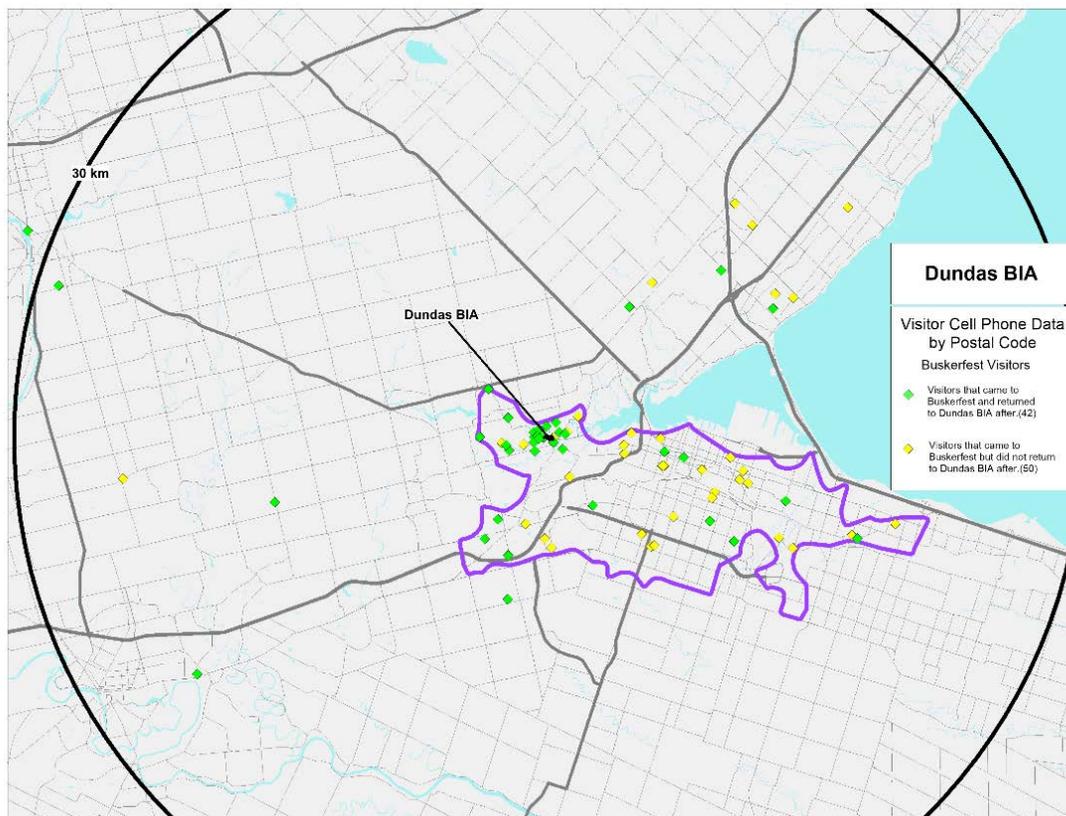
Source: Geomarketing Solutions

Findings

- Those visitors to Downtown Dundas who had been there in the months leading up to each festival increased their visitation to Downtown Dundas by 1.5 times after Buskerfest and 1.3 times after Cactus Festival. In addition, those who returned after Buskerfest tended to have higher household incomes.
- A small percentage of visitors who had not been to Downtown Dundas in the months leading up to each festival made them want to return 2.8 times after Buskerfest visitors and 3.21 times after Cactus Festival.



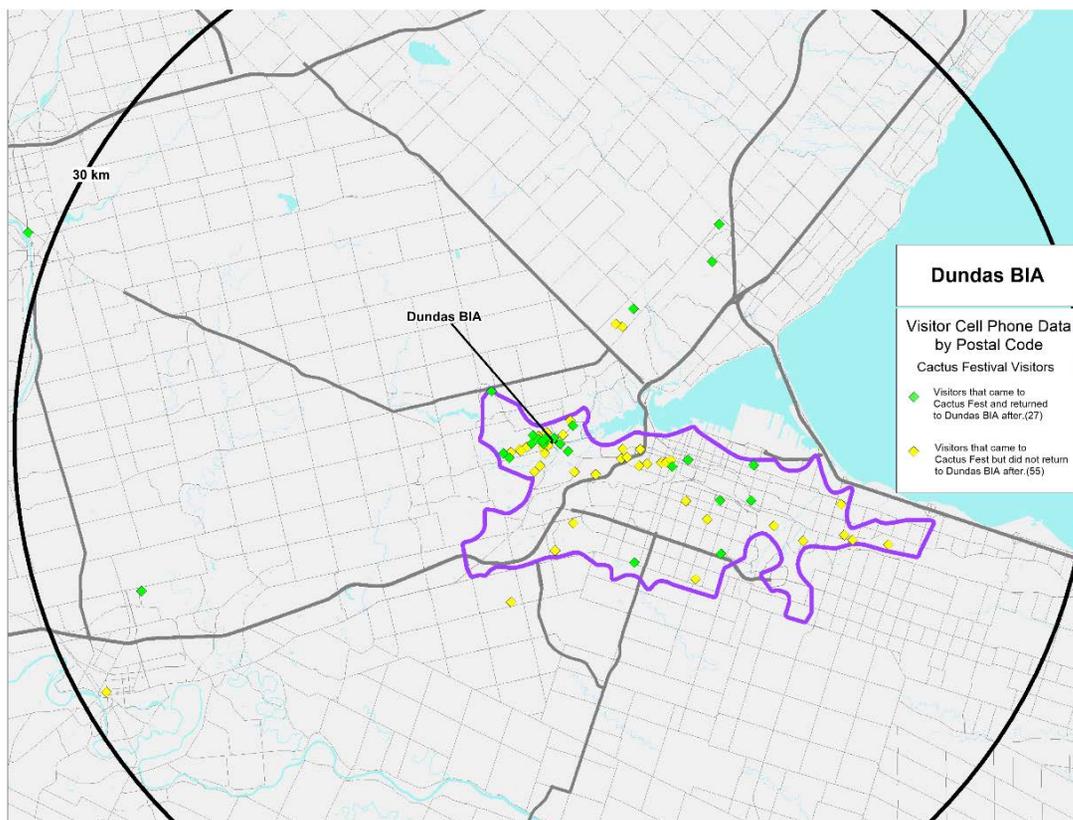
Buskerfest Visitation – Returns and Non>Returns



Source: Geomarketing Solutions



Cactus Fest Visitation – Returns and Non>Returns



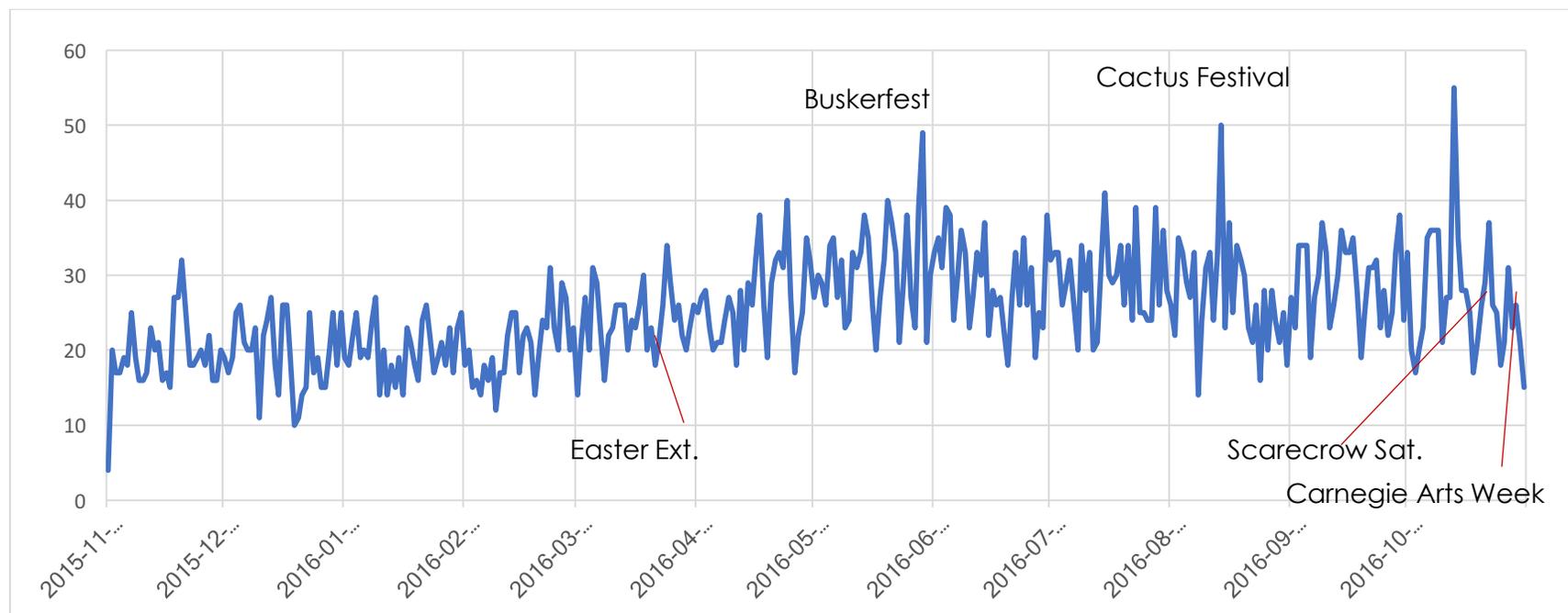
Source: Geomarketing Solutions

Findings

- For both Buskerfest and Cactus Festival, the return visitation primarily comes from those people who live closer to Downtown Dundas.



Daily Visitation to Downtown Dundas BIA – November 2015 to November 2016



Findings

- The most visited days tend to fall on Saturdays, Wednesdays, and Thursdays.
- Generally, visitation has been increasing over 2016.
- The busiest months are May and June but from April to October there is good visitation.
- The highest visitation was on Saturday October 19, 2016. The average temperature in Hamilton was 15.2 and the maximum was 21.7 c.
- After that date, Cactus Festival and Buskerfest have the highest visitation days on August 20, 2016 and June 4, 2016.
- The weekend before Cactus Festival there is a drop-in traffic as people may opt to skip going to the Downtown knowing that the following week they will be there for much of the day. However, the week before Buskerfest, there is not the same noticeable drop in visitation on the prior Saturday.



Visitation by Day of the Week

Day of the Week	Sample Number of Visitors
Sunday	1,159
Monday	1,169
Tuesday	1,265
Wednesday	1,432
Thursday	1,375
Friday	1,440
Saturday	1,385
Total	9,225

Findings

- Wednesday and Friday are the busiest visitation days.
- However, Downtown Dundas is busy from Wednesday to Saturday.
- Sunday has only a slightly less visitation compared to other days of the week but as stated, the visitors to Dundas on Sunday have a high household income profile.



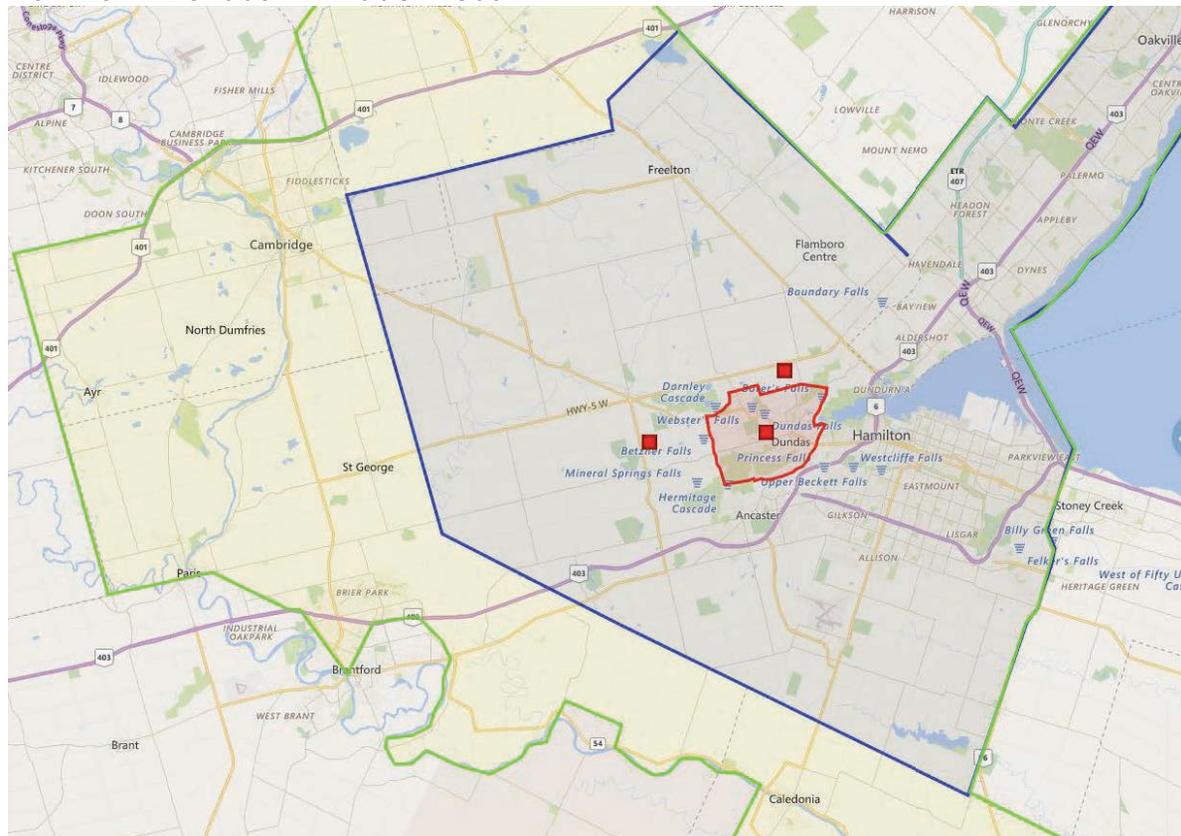
Implications for Downtown Dundas BIA

- Based on the preceding analysis, the trade areas for Downtown Dundas BIA are:
 - Dundas: Dundas community
 - Primary: Burlington, West Hamilton, Ancaster, Hamilton Lower City/Mountain (excluding Stoney Creek)
 - Secondary: Oakville, Cambridge, Brantford, Paris, Caledonia
 - City of Hamilton
 - 60 Minute Drive Time

4.0 Trade Area Socio-Economic Review

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

Downtown Dundas BIA Trade Areas





Trade areas include:

- Immediate: Dundas
- Primary: Burlington, West Hamilton, Ancaster, Hamilton Lower City/Mountain (excluding Stoney Creek)
- Secondary: Oakville, Cambridge, Brantford, Paris, Caledonia
- City of Hamilton
- 60 Minute Drive Time



Population, Households, and Daytime Workers

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
2011 Population	29,019	810,539	1,017,195	519,950	4,940,729
2016 Est. Population	31,401	881,630	1,100,082	555,841	5,428,211
Annualized Population Growth Rate	1.6%	1.7%	1.6%	1.3%	1.9%
Households	13,184	340,316	422,468	220,822	2,059,081
Annualized Household Growth Rate	1.2%	1.1%	1.1%	0.9%	1.4%
Daytime Worker Population	912	381,610	462,027	228,040	3,002,180

Source: Statistics Canada, Environics Estimates 2016

Findings

- Dundas continues to grow at a healthy rate of 1.6% annually. This is higher than the City of Hamilton but similar to other surrounding areas.
- The population growth is higher than the household growth suggesting that larger families are moving into the area or families are having children.
- Dundas has a relatively small daytime workforce. Many people work at nearby McMaster University or commute to other areas such as Burlington, Toronto, and Downtown Hamilton or other parts of Hamilton. It is noted that there are a higher proportion of retirees in the area. Daytime workers are defined as employees during regular working hours (Monday to Friday 9 am to 5 pm) and can include office workers as well as retail and hospitality workers.



Age Profile, Gender, and Ethnicity

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Age Profile					
0 to 9	8.5%	10.6%	10.6%	10.3%	10.8%
10 to 19	9.8%	11.9%	12.0%	11.1%	11.1%
20 to 29	12.9%	13.9%	13.7%	14.8%	14.7%
30 to 39	10.1%	12.3%	12.3%	12.9%	14.9%
40 to 49	11.3%	13.9%	13.7%	12.7%	13.9%
50 to 59	14.9%	15.1%	15.1%	14.9%	14.2%
60 to 69	13.8%	11.0%	11.1%	11.6%	10.3%
70+	18.7%	11.4%	11.3%	11.6%	10.0%
Median Age	47.9	41.0	41.0	40.7	38.9
Gender					
Male/Female	47.4/52.6	49.0/51.0	49.0/51.0	49.3/50.7	49.1/50.9
Ethnicity					
Visible Minority	9.0%	8.8%	17.2%	16.9%	36.8%

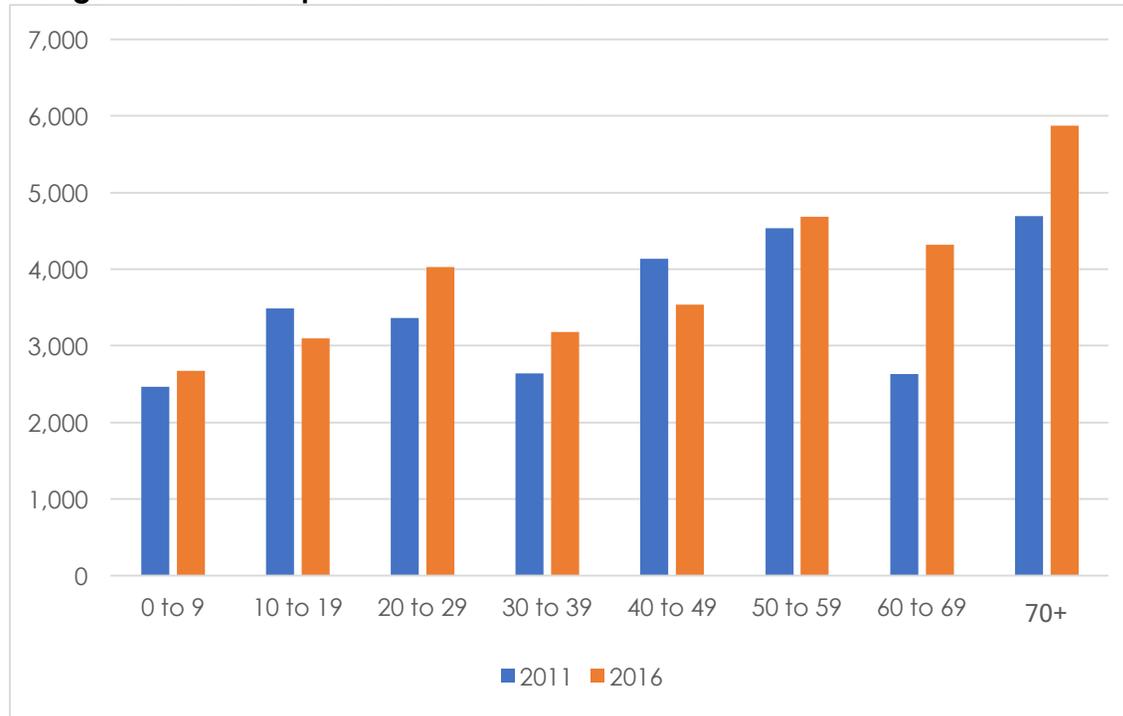
Source: Statistics Canada, Environics Estimates 2016

Findings

- Dundas attracts a high proportion of older residents and retirees. One-third of the population is 60 years or older.
- Correspondingly, there is a higher proportion of females living in Dundas. This is characteristic of an older population. Many interviewees noted that Dundas still attracts a “ladies-who-lunch” crowd.
- The proportion of visible minorities is under 10% and considered low.
- Both the young adult and the children population is proportionately less than elsewhere but both are still a sizeable component of the local area. As noted, there appears to be some evidence of an increasing number of younger families. This is combined with observational data of families with strollers in the Downtown as well as the number of students enrolled in Junior and Senior Kindergarten.



Change in Dundas Population – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

Findings

- The aging seniors' population has been the most noticeable change. As Baby Boomers move into the 60+ age range, Dundas' age profile has been reflective of that shift.
- There is a corresponding shift to fewer 40 to 49 years (Generation X) as this is a smaller age cohort. Businesses that relied heavily on catering to this age range will encounter slower sales all things being equal.
- There is growth in the 20 to 39 young adults. Millennials account for the next large generation. This group is now at their early family formation years and there is a corresponding increase in very young children. This is where Downtown Dundas will become competitive with other commercial districts that are geared to Millennials such as James St. N. or Locke St. S.



Household Size and Marital Status

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Household Size					
1 Person	30.1%	25.4%	24.7%	27.7%	26.3%
2 Person	35.1%	31.7%	32.1%	32.7%	29.7%
3 Person	14.3%	16.3%	16.5%	16.0%	16.5%
4 Person	14.3%	17.2%	17.2%	15.3%	27.5%
5+ Persons	6.2%	9.4%	9.5%	9.2%	
Person Per Household	2.32	2.55	2.56	2.47	2.60
Marital Status					
Single	25.4%	27.9%	27.4%	29.3%	30.3%
Married, Common Law	53.2%	56.1%	56.8%	53.5%	54.8%
Separated, Divorced, Widowed	21.4%	16.0%	15.8%	17.2%	14.9%

Source: Statistics Canada, Environics Estimates 2016

Findings

- There are a high proportion of senior individuals living in Dundas. Of note, 21.4% of the population is separated, divorced, or widowed. This is higher than elsewhere.
- The proportion of single persons is lower compared to elsewhere but it is not insignificant.
- As a result, the household size is only slightly less than elsewhere.
- The older population living in Dundas tends to be more active than in other communities. They are characterized as being independent living as well as outdoor enthusiasts.
- There is the expectation that the persons per household will increase as young families continue to move into the area and have children and older families and empty nesters move out or shift to senior and retirement based housing units in Dundas.



Education, Occupation, and Home Ownership

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Education					
Less than High School	13.2%	16.9%	17.8%	21.0%	18.1%
High School Graduate	22.2%	24.9%	25.8%	26.2%	24.6%
College, Diploma	23.9%	26.4%	27.1%	26.6%	23.1%
University Graduate	40.7%	31.8%	29.3%	26.2%	34.2%
Occupation					
Management	23.2%	27.9%	27.1%	23.2%	27.4%
Science	10.4%	6.7%	6.5%	6.2%	8.2%
Health	7.3%	7.8%	7.4%	7.6%	5.4%
Govt, Ed., Social Services	17.4%	12.4%	11.8%	12.4%	11.7%
Arts, Culture, Recreation	4.5%	3.0%	2.9%	2.8%	3.5%
Sales and Service	20.3%	23.7%	23.6%	23.9%	23.8%
Other	14.0%	16.2%	18.5%	21.2%	17.5%
Labour Force Participation	57.2%	61.3%	62.4%	58.3%	64.6%
Ownership to Renters	69.5/30.5	73.7/26.3	74.3/25.7	69.9/30.4	66.8/33.2

Source: Statistics Canada, Environics Estimates 2016

Findings

- Dundas residents are well educated. A high proportion work in education (and government and social service) due to the proximity of McMaster University.
- Dundas is an artist community and the Dundas Valley School of Art is a staple of the Downtown area. The proportion of people employed in arts, culture, and recreation is slightly higher than elsewhere.
- The labour force participation is lower than elsewhere but reflective of the high proportion of retirees.
- Home ownership rates are equivalent to elsewhere in Hamilton.



Travel to Work

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Travel to Work					
Vehicle - Driver or Passenger	81.5%	80.5%	82.3%	81.0%	71.8%
Public Transit	9.7%	12.4%	10.8%	11.2%	19.9%
Walk	6.5%	5.0%	4.9%	5.9%	5.7%
Bike	1.6%	0.9%	0.8%	1.0%	1.5%
Other	0.7%	1.2%	1.2%	1.0%	1.1%

Source: Statistics Canada, Environics Estimates 2016

Findings

- There is very high dependence on vehicular driving to get to and from work.
- Public transit ridership is very low compared to elsewhere.
- Walking and biking is slightly above other areas which may be reflective of the outdoor and recreation orientation of the local population.



Household Income

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Household Income < \$20,000	9.7%	9.2%	8.8%	11.3%	11.2%
\$20,000 to \$39,999	13.2%	13.9%	13.5%	16.2%	14.8%
\$40,000 to \$59,999	12.6%	14.7%	14.7%	16.3%	15.0%
\$60,000 to \$79,999	11.5%	13.1%	13.5%	13.9%	13.3%
\$80,000 to \$99,999	11.0%	11.0%	11.5%	9.2%	11.0%
\$100,000 to \$149,999	19.8%	18.7%	19.4%	17.7%	17.9%
\$150,000 to \$200,000	11.7%	9.6%	9.6%	7.7%	8.4%
\$200,000 +	10.6%	9.8%	8.9%	5.6%	8.4%
Average Household Income	\$110,641	\$108,564	\$106,457	\$90,192	\$105,305
Real Annualized Growth in Household Income	0.9%	0.6%	0.6%	0.9%	0.6%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Average household income in Dundas is very high. 42.1% of the households earn more than \$100,000 annually and 10.6% early more than \$200,000 annually.
- In addition, real household income growth (excluding inflation) was 0.9% annually. This is higher than many other nearby areas. Households have an increasing amount of disposable income to spend on goods and services.



4.1 New Residential Developments

Findings

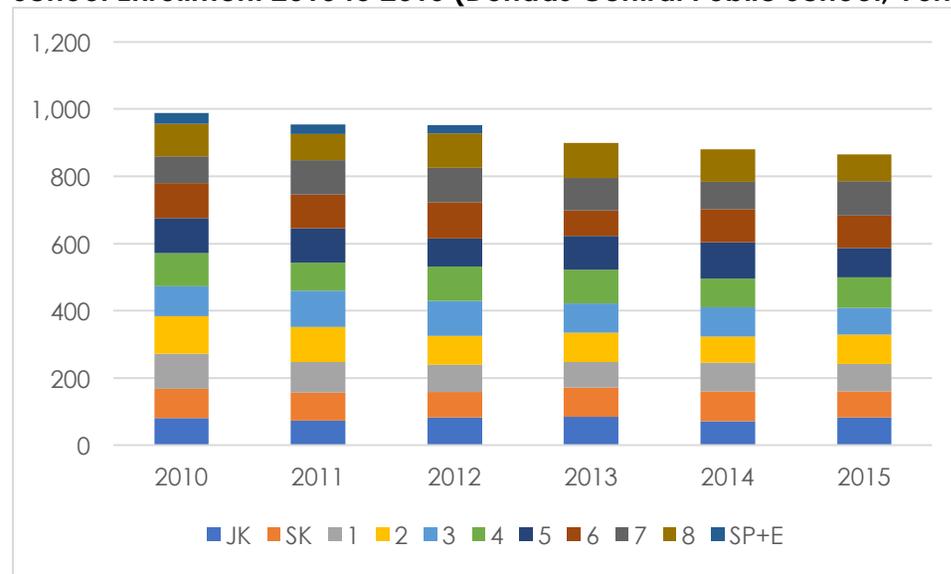
- Most the new construction in Dundas has occurred on Creekside Dr. and Hatt St.
- There is a proposed development at 71 Main St. for 64 units.
- The redevelopment at King St. and Main/Ogilvie intends to convert the upper level units to condos.



4.2 School Enrollment

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

School Enrollment 2010 to 2015 (Dundas Central Public School, Yorkview, and St. Augustine)



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

Findings

- Overall school enrollment has declined but there has been a modest uptick for several younger school aged children including Junior and Senior Kindergarten which is suggestive of future changes towards more younger families.



4.3 Household Expenditure

Household Expenditure

	Dundas	Primary	Secondary	Hamilton	60 Minute Drive Time
Women's Clothing and Accessories	\$2,556	\$2,401	\$2,312	\$2,006	\$2,288
Men's Clothing and Accessories	\$1,255	\$1,342	\$1,306	\$1,077	\$1,422
Children's Clothing and Accessories	\$41	\$74	\$77	\$62	\$113
Clothing Gifts	\$96	\$82	\$83	\$79	\$72
Furniture	\$1,692	\$1,692	\$1,631	\$1,331	\$1,746
Electronics	\$1,028	\$1,133	\$1,123	\$907	\$1,145
Leisure Goods	\$1,072	\$1,031	\$977	\$861	\$2,872
Florists	\$545	\$469	\$441	\$445	\$320
Food from Stores	\$9,259	\$9,204	\$9,134	\$8,514	\$8,642
Alcohol Purchased from Stores	\$1,873	\$1,790	\$1,767	\$1,546	\$1,604
Food from Restaurants	\$4,403	\$4,024	\$3,962	\$3,582	\$3,917
Alcohol from Restaurants	\$613	\$647	\$623	\$511	\$730
Health and Pharmacy Goods	\$2,830	\$2,584	\$2,558	\$2,364	\$2,496
Personal Care Services	\$1,327	\$1,213	\$1,193	\$983	\$1,189
Packaged Travel	\$1,215	\$1,034	\$1,028	\$797	\$850
Laundry and Dry Cleaning	\$106	\$90	\$84	\$119	\$196
Recreational Services	\$679	\$646	\$610	\$480	\$541
Movies	\$93	\$102	\$97	\$92	\$196
Live Sporting Events	\$90	\$79	\$74	\$71	\$88
Live Performing Arts	\$182	\$151	\$141	\$202	\$163

Source: Statistics Canada, Environics Estimates 2016



Findings

Households in the immediate/ Dundas area spends a higher proportion of their budget on:

- Packaged travel
- Recreational services
- Personal care services
- Women's clothing and accessories
- Gifts
- Live sporting events
- Leisure goods (sporting goods, books, music, arts/crafts, toys, etc.)

Dundas Segmentation

Dividing Dundas in geographic areas of North of Governor's Rd. and South of Governor's Rd. reveals the following:

Socio-Economic Profile of Dundas

	North of Governor's Rd.	South of Governor's Rd.
Population 2016 Est.	13,061	18,340
Annualized Growth Rate	0.7%	1.2%
Median Age	47.4	48.3
People Per Household	2.34	2.31
Average Household Income	\$114,358	\$108,020
Bachelor's Degree or Higher	30.9%	39.9%
Age Profile 70+	15.7%	20.9%

Source: Statistics Canada, Environics Estimates

Findings

- South of Governor's Rd. has a higher population and a higher growth rate.
- The residents south of Governor's Rd. tend to be older and 21% of the population is over 70 years of age.
- Average household incomes are higher north of Governor's Rd.
- South of Governor's Rd. and closer to McMaster University, there proportion that have a bachelor's degree or higher increases.



Implications for Downtown Dundas BIA

- Local Dundas residents will spend higher proportions of their incomes on experiences including travel, recreational work out services, eating out, and personal care (hair salon, nails, spa, etc.)
- Indoor and outdoor recreation is important and reflected in higher proportionate expenditure in recreational services, leisure goods, and live sporting events.
- Looking good is key including higher proportionate expenditure on personal care services and women's clothing and accessories.
- Gift buying is a major driving force behind Downtown Dundas shopping including host/hostess gifts and other occasions and the Christmas holidays.



5.0 Other Major Target Markets and Customer Visitation

Within Dundas, there are a range of community activity centres that attract visitors including:

- Dundas Valley School of Art
- Dundas library
- Dundas Museum Archives

Dundas Museum Archives Attendance

	Attendance
2014	7,433
2015	11,016
2016	12,366
Average	10,273

Source: Dundas Museum Archives

- J.L. Grightmire Market St. Arena
 - 1000 seat arena that hosts two hockey teams: Real McCoys (12 homes games) and Jr. C. Dundas Blues (approx. 10 home games) as well as events such as Lobster Fest and concerts
- Dundas Community Pool
- Olympic Surface Arena
- Outdoor recreation visitors – including recreation trails (Spencer Gorge, Webster Falls, etc.)

In addition, there are other major employers near the BIA such as McMaster University that the Downtown could target for visitation.

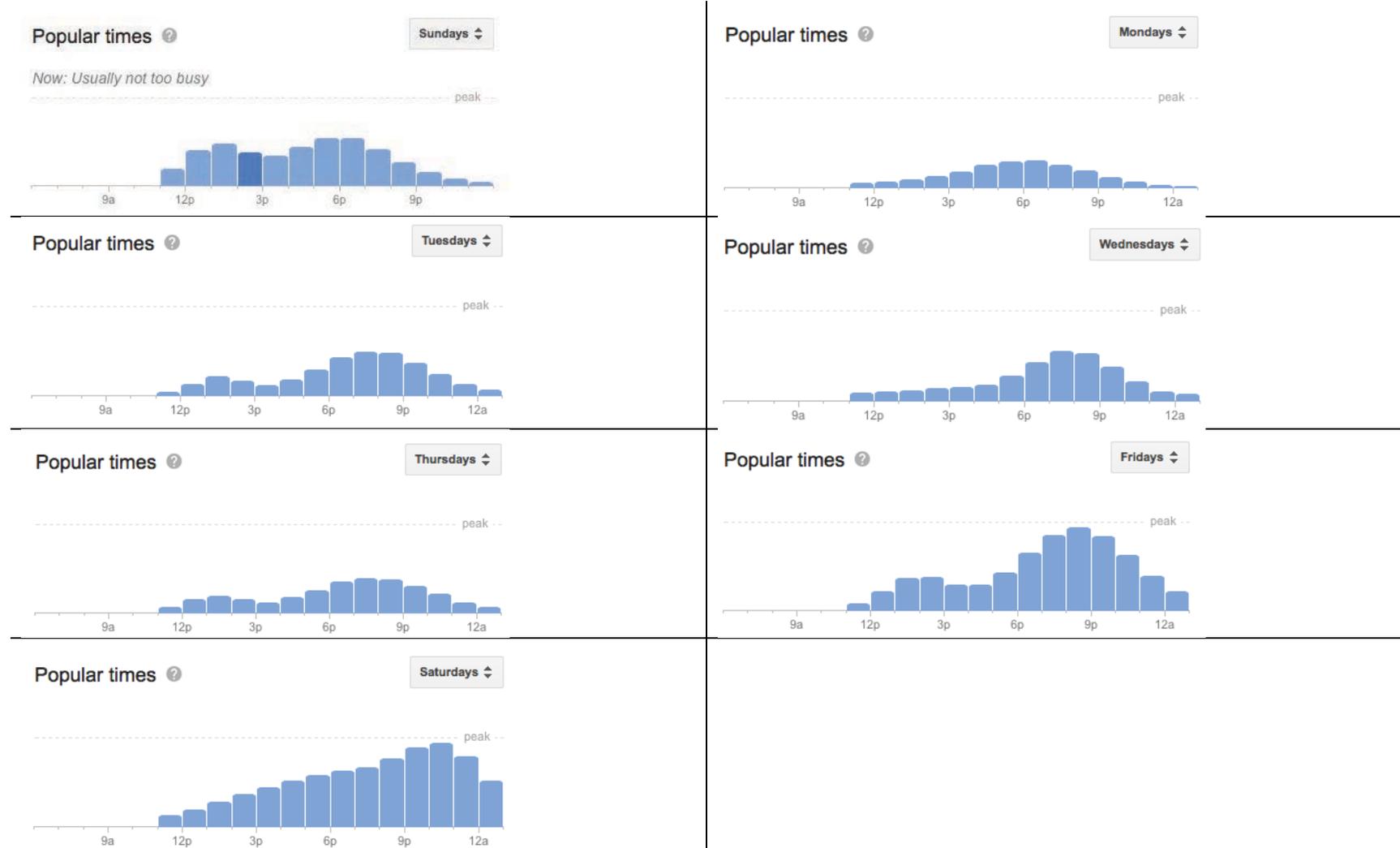


5.1 Customer Visitation Data

Customer Flow Times

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

Winchester Arms



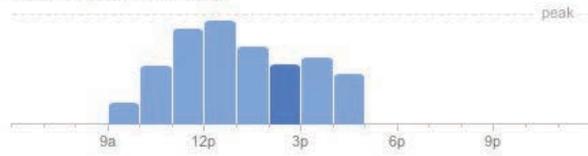


Taylor's Tea Room

Popular times ?

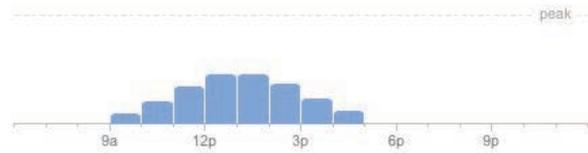
Sundays

Now: Usually a little busy



Popular times ?

Tuesdays



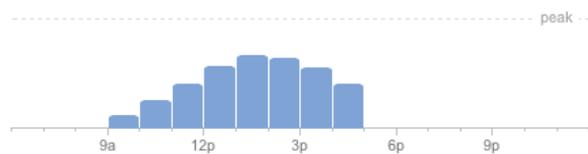
Popular times ?

Thursdays



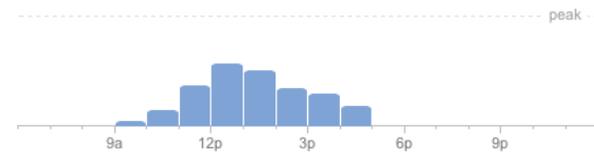
Popular times ?

Saturdays



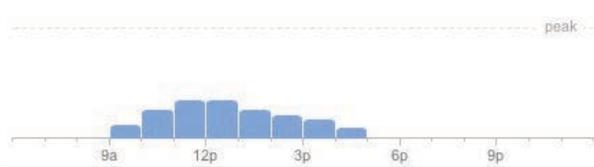
Popular times ?

Mondays



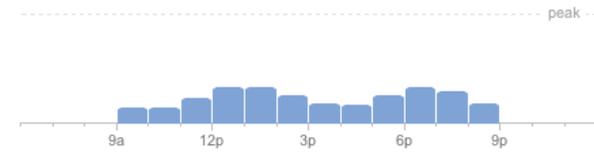
Popular times ?

Wednesdays



Popular times ?

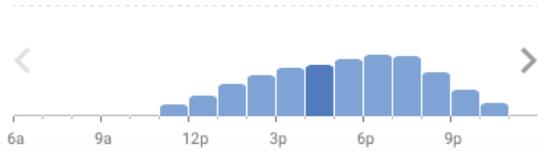
Fridays





The Collins

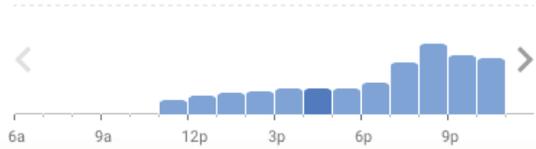
Popular times Sundays ▾



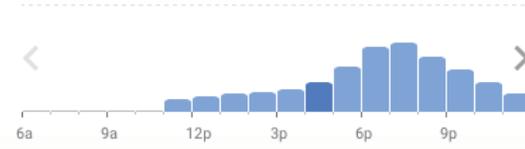
Popular times Mondays ▾



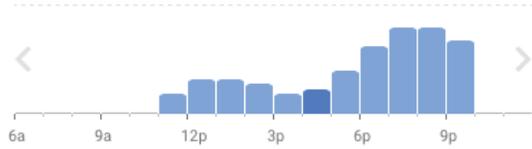
Popular times Tuesdays ▾



Popular times Wednesdays ▾



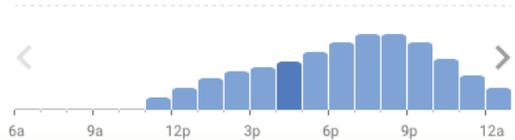
Popular times Thursdays ▾



Popular times Fridays ▾

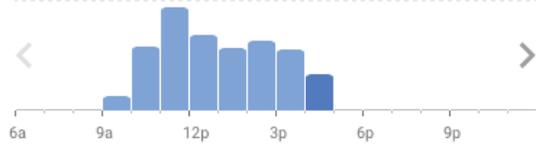


Popular times Saturdays ▾

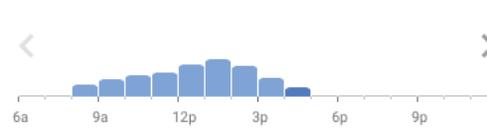


Detour

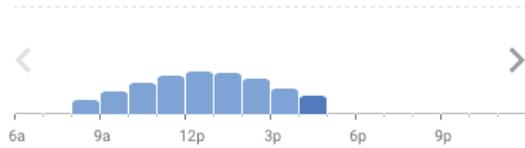
Popular times **Sundays** ▾



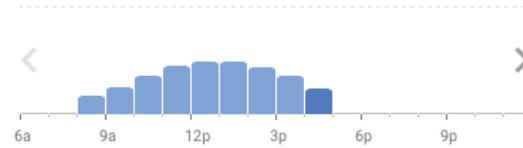
Popular times **Mondays** ▾



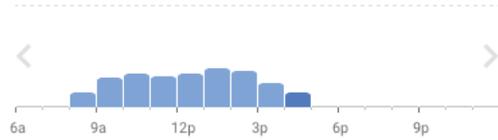
Popular times **Tuesdays** ▾



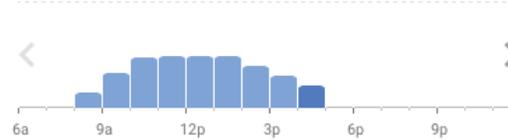
Popular times **Wednesdays** ▾



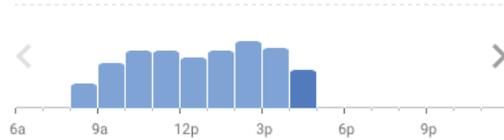
Popular times **Thursdays** ▾



Popular times **Fridays** ▾

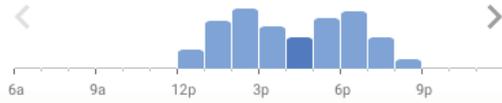


Popular times **Saturdays** ▾



Bangkok Spoon

Popular times **Sundays** ▾



Popular times **Tuesdays** ▾



Popular times **Thursdays** ▾



Popular times **Saturdays** ▾



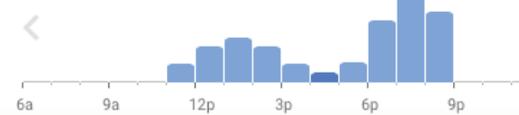
Popular times **Mondays** ▾



Popular times **Wednesdays** ▾



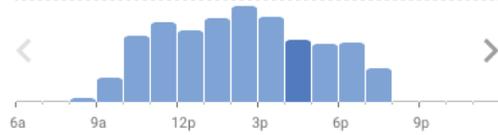
Popular times **Fridays** ▾





Emilios

Popular times Sundays ▾



Popular times Mondays ▾



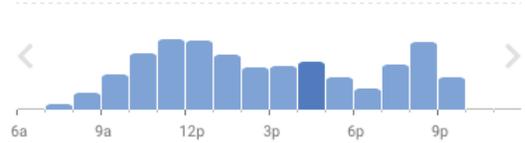
Popular times Tuesdays ▾



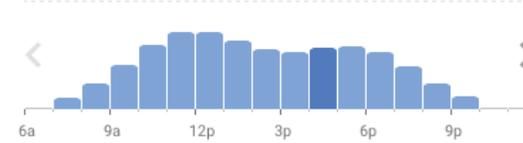
Popular times Wednesdays ▾



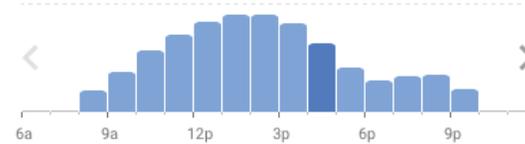
Popular times Thursdays ▾



Popular times Fridays ▾



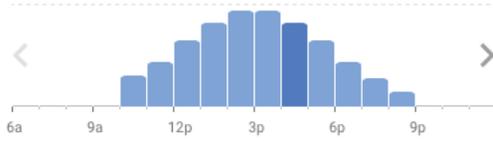
Popular times Saturdays ▾





Dundas Library

Popular times Tuesdays ▾



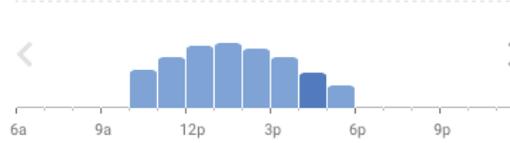
Popular times Wednesdays ▾



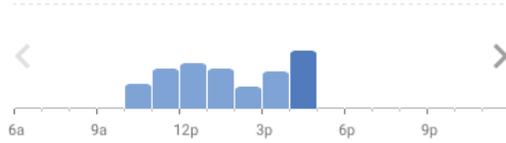
Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾





Findings

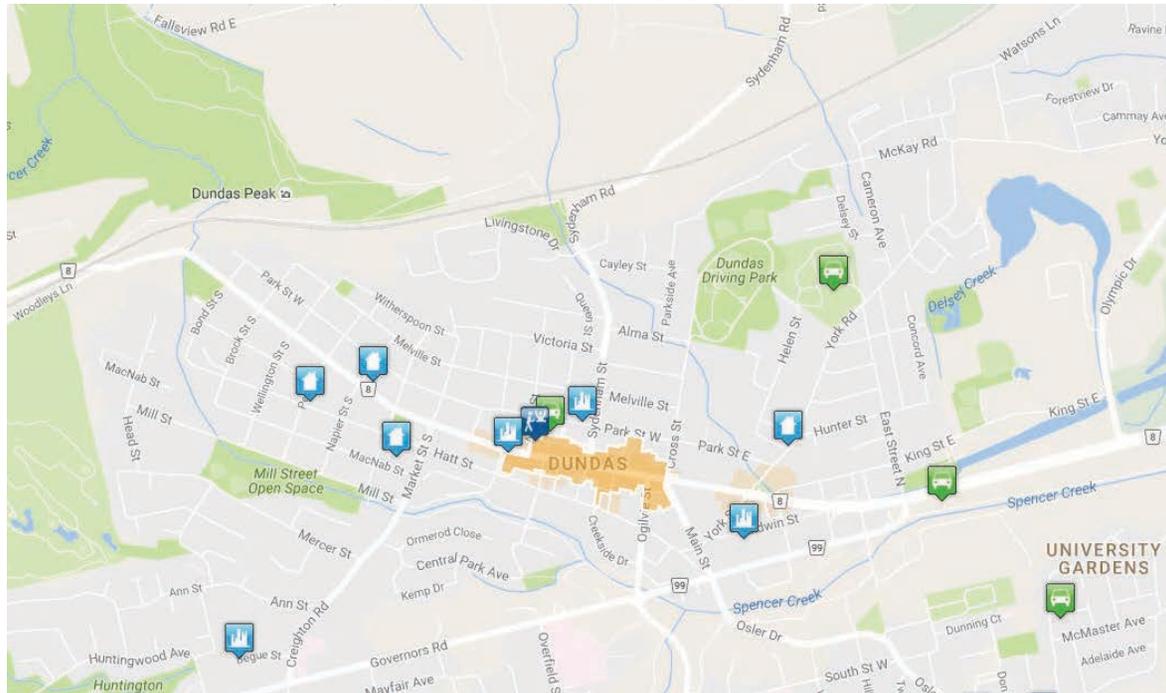
- Food services can do two main draws per weekday: breakfast/lunch or lunch/dinner. Businesses need to increase their daytime or night time reach to afford the rents and draw the traffic.
- Increasingly, food services are becoming the glue that holds the shopping experience together and encourages visitors to stay longer and shop more.
- There is increasing importance of dinner to the Downtown Dundas functional and experiential offering as the night time economy continues to evolve.

7.0 Quality of Life Statistics – Crime Statistics and Housing Prices

7.1 Crime Statistics

Within and near Downtown Dundas BIA, there have been 4 incidents from December 2015 to November 2016.

Crime Incidents Dundas – December 2015 to November 2016



Source: Hamilton Police Services

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



7.2 Housing Prices

As of November 2016, housing prices in Dundas increased an impressive 45.9% from 2015 to 2016. Average house prices increased from \$420,338 to \$613,254. From 2012 to 2016, average prices increased at an annualized rate of 16.0%. This illustrates the sought-after benefits of living in Dundas and the importance of having a well-functioning, attractive, and people gathering focused Downtown for nearby residents and quality of life attributes.

Dundas Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$338,184	
2013	\$386,386	14.3%
2014	\$401,659	4.0%
2015	\$420,338	4.7%
2016	\$613,254	45.9%

Source: Realtors' Association of Hamilton and Burlington



8.0 Commercial Audit and Rent Review

An audit of the commercial businesses in Downtown Dundas BIA was conducted in November 2016. Ground floor and easily accessible businesses were included in the audit. Each business was noted for its name, address, business type according to NAICS, and estimated size (in square feet).

Downtown Dundas BIA Commercial Business Audit – 2016

	2016			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	14	11.2%	18,100	9.3%
Furniture and Home Furnishings	6	4.8%	15,600	8.0%
Electronics and Appliance Stores	0	0.0%	0	0.0%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	7	5.6%	16,000	8.2%
Other Retail	2	1.6%	2,300	1.2%
Total Retail	29	23.2%	52,000	26.6%
Food/Drug Retail				
Food and Beverage Stores	6	4.8%	8,300	4.3%
Health and Personal Care Stores	4	3.2%	10,500	5.4%
Total Food/Drug Retail	10	8.0%	18,800	9.6%
Food Services	20	16.0%	31,900	16.3%
Services				
Personal Services	3	2.4%	2,800	1.4%
Personal Services - Beauty	6	4.8%	6,900	3.5%
Financial Services	5	4.0%	14,000	7.2%
Medical Services	21	16.8%	23,300	11.9%
Professional Services	17	13.6%	17,500	9.0%



Recreation Services	2	1.6%	8,500	4.4%
Other Services	7	5.6%	14,900	7.6%
Total Services	61	48.8%	87,900	45.0%
Total Occupied	120	96.0%	190,600	97.6%
Vacant	5	4.0%	4,600	2.4%
Total	125	100.0%	195,200	100.0%

Source: 360 Collective



Downtown Dundas BIA Commercial Business Audit

	2016				2009			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise								
Clothing and Accessories	14	11.2%	18,100	9.3%	15	12.6%	19,400	11.1%
Furniture and Home Furnishings	6	4.8%	15,600	8.0%	5	4.2%	12,500	7.2%
Electronics and Appliance Stores	0	0.0%	0	0.0%	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	7	5.6%	16,000	8.2%	5	4.2%	12,800	7.3%
Other Retail	2	1.6%	2,300	1.2%	2	1.7%	2,000	1.1%
Total Retail	29	23.2%	52,000	26.6%	27	22.7%	46,700	26.8%
Food/Drug Retail								
Food and Beverage Stores	6	4.8%	8,300	4.3%	10	8.4%	11,900	6.8%
Health and Personal Care Stores	4	3.2%	10,500	5.4%	4	3.4%	11,800	6.8%
Total Food/Drug Retail	10	8.0%	18,800	9.6%	14	11.8%	23,700	13.6%
Food Services	20	16.0%	31,900	16.3%	14	11.8%	21,500	12.3%
Services								
Personal Services	3	2.4%	2,800	1.4%	3	2.5%	2,800	1.6%
Personal Services - Beauty	6	4.8%	6,900	3.5%	6	5.0%	6,200	3.6%
Financial Services	5	4.0%	14,000	7.2%	4	3.4%	13,000	7.5%
Medical Services	21	16.8%	23,300	11.9%	20	16.8%	20,600	11.8%
Professional Services	17	13.6%	17,500	9.0%	22	18.5%	23,100	13.3%
Recreation Services	2	1.6%	8,500	4.4%	1	0.8%	2,500	1.4%
Other Services	7	5.6%	14,900	7.6%	6	5.0%	11,600	6.7%
Total Services	61	48.8%	87,900	45.0%	62	52.1%	79,800	45.8%
Total Occupied	120	96.0%	190,600	97.6%	117	98.3%	171,700	98.5%
Vacant	5	4.0%	4,600	2.4%	2	1.7%	2,600	1.5%
Total	125	100.0%	195,200	100.0%	119	100.0%	174,300	100.0%



Findings

There is approximately 200,000 sq. ft. of commercial businesses in Downtown Dundas BIA which is a medium sized commercial main street.

- There are 125 different businesses. The average size of each business is 1,562 sq. ft.
- Services is the largest category. Services account for 45% of the total square footage. This includes both professional services, medical services, automotive, recreational, and personal services.
- Retail merchandise accounts for 27% of the total square footage. There are more clothing and accessories stores, however, in terms of total square footage there is not one retail category that dominates over the other. There is a wide range of clothing and accessories retailers, leisure retailers, and furniture and home furnishings retailers.
- Food and drug retail accounts for 10% of the total square footage. This excludes the large Shoppers Drug Mart adjacent to the BIA boundary. There is a good assortment of different specialty food, health, wellness, type retailers.
- A growing category is food services. In 2016, food services accounts for 16% of the total square footage. New food concepts will keep the main street fresh and exciting.
- Vacancy is a low 2% of the total square footage and the majority are in the basement of one of the office buildings.

Changes since 2009/2010

- Since 2009, more retail space has been added including the redevelopment of the former Post Office space and 46 King St.
- There is approximately 20,000 more sq. ft. of retail commercial space in Downtown Dundas
- The number and total square footage of Services has remained relatively the same.
- Retail Merchandise has increased in line with growth in the leisure retail category.
- Food and Beverage retailers has decreased by 4,900 sq. ft. or by four businesses.
- The number and square footage of Health and Personal Care stores has remained approximately the same.
- Food Services has witnessed the highest growth of over 10,000 sq. ft. and 6 new businesses opening.
- There is a slight increase in vacancy from 2009 to 2016 but it remains very low.
- Many of the businesses in Downtown Dundas in 2009 are still present in 2016. This represents significant resiliency on the part of these anchor type businesses.



Business Mix Recommendations

- Develop a realistic wish list of commercial businesses
- Ensure ideal business mix stays within the parameters set out as per the Downtown Dundas vision and to ensure a healthy mix of complementary businesses (no one business category should dominate over the others)
- Maintain retail merchandise at current range of 25% to 30% (currently 27%)
- Maintain food services at minimum 15% to 20% (currently 16%)
- Maintain food and drug retail to minimum 10% to 12% (currently 10%)
- Ensure vacancy remains under 4% (currently 2%)

8.1 Changes in Downtown Dundas BIA Businesses from 2009 to 2016

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



21 King St.: 2016 - New food service operators maximizing opportunities where there are larger spaces even though they may be less visible.

2009 – no image



46 King St.: 2016 – New infill mixed-use redevelopment where a vacant lot once stood has created retail opportunities and new public gathering spaces.



2009 – vacant lot and commercial building



10 King St.: 2016 – The Carnegie Gallery has recently been upgraded for increased accessibility, increased gallery space, and meeting space to ensure the gallery remains up to date and relevant for potential users/visitors. The façade has been cleaned up.



2009



104 King St.: 2016 – The former Post Office has been converted to retail, food service, office, and recreation spaces. It serves as a bridge connecting the retailers to the west and east. However, it still needs improvements to function better a retail commercial space.



2009



105 King St.: 2016 - The vacated drug store has been occupied by another drug store as well as unique retailers and small pop up food services that break up the long building frontage and keep the street animated.



2009



41 King St.: 2016 – The coffee shop has expanded operations and become a go-to place for lunch (brunch spot).



2009



33 King St.: 2016 – the façade has been updated and the paint removed



2009



57 King St.: 2016 - the retail space has been completely redeveloped to add a modern restaurant space



2009



112 King St.: 2016 - the vacant lot is set to be a three-storey mixed-use building



2009

8.2 Downtown Dundas BIA Area Retail Rents

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

Local Area Rents

Address	Sq. Ft.	Rent/sq. ft. (gross)	Comments
90 King St.	2,100	\$16	
11 Sydenham St.	2,000	\$24 (gross incl. utilities)	

Findings

- Rents east of Sydenham Rd. are increasing and are approximately double of those to the west.
- Generally net rents are \$20 to \$35/sq. ft. east of Sydenham Rd. and \$15 to \$20/sq. ft. west of Sydenham Rd.
- However, there are increased number of instances where rents have increased significantly higher than these rates stated in this report.
- In addition, there is a high proportion of owner occupied retail buildings.
- As rents increase it becomes more difficult to attract entrepreneurial businesses.
- Higher rental rates will also attract attention from chain retailers. It will require pressure on property owners to ensure that unique and independent type businesses remain in Downtown Dundas.



Implications for Downtown Dundas BIA

- Downtown Dundas is an ideal main street including:
 - There is approximately 200,000 sq. ft. of retail space that is enough to create critical mass to cater to both local residents and regional visitors.
 - Downtown Dundas is not a “one-trick pony”. No retail category dominates the BIA. Rather there is a mix and range that is complementary to one another that creates an enjoyable shopping and visiting experience.
 - There is enough critical mass and complementary food service operators that regional visitors can spend time shopping and relaxing to make Dundas a day-tripper destination.
 - There has been redevelopment of properties to create a greater cross shopping experience throughout the entire BIA such as the Post Office redevelopment and 46 King St. Included is redevelopment of the interior of the retail spaces such as Freewheel Cycle.
 - The relatively small retail spaces may make it difficult for some food service concepts as they tend to demand slightly larger retail units but generally this is a good mix of different retail unit sizes.
 - As rents rise, there will be pressure on some furniture and home furnishings stores (and some leisure retailers) as these retailer types cannot pay high rents. In addition, as noted, more national and international chains will be interested in Downtown Dundas.

9.0 Investment in Downtown Dundas BIA

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

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

Current 2016 Development Applications

There are two active development applications for places in Downtown Dundas BIA.

Development Applications

Application Type	Number	Address	Purpose of Application
Condominium	25CDM-201509	2 KING ST W	Plan of Condominium, to convert top 2 floors of Non-residential building to 18 apartment units with commercial uses on the ground floor.
Site Plan	DA-12-199	112 KING ST W	To construct a 3 storey mixed use (6,000 sq. ft. commercial ground floor with either upper storey residential or office component). Parking in rear.



Source: City of Hamilton Planning and Economic Development Department



Commercial Building Permits

Downtown Dundas BIA Value of Commercial Building Permits

Year	Annual Total	Cumulative Total
2010	\$331,200	
2011	\$2,501,450	\$2,832,650
2012	\$1,517,000	\$4,349,650
2013	\$264,470	\$4,614,120
2014	\$190,700	\$4,804,820
2015	\$347,000	\$5,151,820

Source: City of Hamilton

Findings

- There has been significant investment in Downtown Dundas. From 2010 to 2015, over \$5 million has been invested including the redevelopment of the former Post Office.

Grants and Incentives

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

Year	Actual Cost including CFIG	Heritage Tax Grants
2010	\$45,398.69	
2011	\$168,935.00	\$150,000.00
2012	\$0	
2013	\$18,124.10	\$22,260.50
2014	\$245,551.90	
2015	\$104,393.42	\$7,596.99
Total	\$582,409.11	\$179,857.49

Source: City of Hamilton



Findings

- In the past businesses in Downtown Dundas BIA had not made good use of the City of Hamilton grants and loan programs. By 2015, usage has increased significantly.
- There has been over \$760,000 in grants combined with private sector money for businesses in Downtown Dundas BIA from 2010 to 2015.

Assessed Value

Downtown Dundas BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2010	\$16,851,124	
2011	\$18,894,615	12.1%
2012	\$20,074,100	6.2%
2013	\$20,913,745	4.2%
2014	\$21,617,330	3.4%
2015	\$23,537,726	8.9%

Source: MPAC, City of Hamilton

Findings

- From 2010 to 2015, the assessed value of the commercial areas within the Downtown Dundas BIA has increased by over \$6.6 million. This represents an annualized rate of 6.9%.

Implications for Downtown Dundas BIA

- The level of investment in Downtown Dundas 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.



Downtown Dundas BIA Budget

The Downtown Dundas budget has increased modestly from 2010 to 2015. This matches new commercial development such as the Post Office redevelopment and 46 King St. W. One difficulty with the budget process is the amount of monies raised through parking revenue sharing and the fact that it has recently declined.

Downtown Dundas BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2010	\$976.19	\$11,398.26		\$12,374.45	\$100,000.00	\$148,000.00
2011	\$905.08	\$10,888.16	\$28,900.24	\$40,693.48	\$100,000.00	\$139,000.00
2012	\$960.58	\$11,641.41	\$29,461.64	\$42,063.63	\$110,000.00	\$150,600.00
2013	\$961.35	\$11,593.90	\$28,531.41	\$41,086.66	\$113,300.00	\$154,400.00
2014	\$1,000.00	\$11,712.11	\$29,461.42	\$42,173.53	\$116,699.00	\$162,000.00
2015	\$1,316.60	\$12,380.74	\$23,162.28	\$36,859.62	\$119,800.00	\$175,350.00

Source: City of Hamilton



10.0 Key Person Interviews

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

STRENGTHS

Sales Prospects

- Sales have been good
- Consistent sales – not up or down
- Sales have been regular
- Dundas does twice the sales of other locations
- In the past four year sales have increased significantly but over last year, they are down
- Sales increases are due to the best customer service and attention to detail and not necessarily the brand/product
- Have been able to expand business over the years
- 2016 was a good year

Gift Buying

- Rely on the holiday season for high proportion of sales
- Gift buying is a major component of business sales
- Some holidays our store does exceptionally well
- Get men at the last minute trying to buy gift for their wife
- Focused on healthy, organic, natural, similar products
- Want to increase gift and retail sales component of the business

Customers

- Good loyal customers
- Rely on small number of very loyal customers
- It is all about the service that you provide to your customers
- It is primarily an older crowd but are seeing younger people
- Appeal to all ages
- Have noticed a more mature market in Dundas (twilight years)



- More conservative market
- More educated consumer
- Dundas residents are fiercely local and support local businesses
- Appeal is 60% local and 40% regional
- 30 to 50 year olds
- Very loyal customer base
- Able to appeal to the male visitors who are in town with their wives who are fashion shopping
- It is a more mature crowd
- Rely on working women and less on retired women

Expanding Business Operations

- Have expanded services to increase sales and get new customers. Service aspect converts customers to buy goods
- Have found products that sell well to visitors
- Younger people coming into store on the weekends

West End

- New business openings including Shoppers Drug Mart and other unique business have increased traffic to the west end of Downtown
- West End is new it-spot in Dundas

Beautification

- BIA doing a great job at beautification
- Dickens of Christmas is great.
- Downtown looks great

New Businesses

- New businesses such as Printing House, brewery, and restaurants are welcome additions
- Restaurants are changing the face of Downtown Dundas for the better



Extended Hours and Sundays

- Opening extended hours and being open Sunday works
- Able to do some business based on the evening restaurant traffic
- Stay open late in the evenings as cater to working people

Community of Businesses

- Good sense of community amongst the businesses, we all refer other businesses to customers back and forth

Events

- Have adjusted business to take advantage of the crowds during the major events to make sales
- Have participated in events and was able to convert visitors to shoppers after the event
- Buskerfest is very good for business
- Both events are good for business
- Farmers' market is very good for business
- Events are good but maybe something new is required

Destination Shopping

- People search out store especially during the holidays
- All businesses have a unique positioning and we don't step on each other's toes too much

City

- Improved relations with City, better communication
- Patio project is good but want to know more about it
- Grants and incentives are good



Business or BIA Marketing

- Need to rely on direct marketing to customers to get them in the store on a repeat basis
- Businesses need to invest early on in good customer tracking methods to follow up with loyal customers
- BIA is doing a good job marketing
- BIA does a great job promoting the Town during Christmas, looks great



WEAKNESSES

Rent Affordability

- Increasing rents make it more difficult to do sales

Business Operations Expenses

- Increased electricity costs, taxes, and rent are putting pressure on the sales margins

Internal Competition

- Too many businesses are selling either the exact same merchandise or similar merchandise which just means the businesses are dividing the pie into smaller chunks. They should be focused on merchandise mix that expands the pie
- Shoppers Drug Mart provides competition and it will continue to get tougher as they expand into Loblaw's type categories
- Nothing new on the street, it is the same businesses that have been there forever and they are not adjusting or changing to the new reality of how people shop

Sales Decrease

- Sales have not been keeping pace with growth of the area

BIA

- Not sure what the BIA staff person does all day for a full-time position

Hours

- Not worth staying open later in the evening, nobody is there
- Have tried extended hours in the evening but it is not worth it

Isolated and Growth Constraints of Dundas

- Dundas is constrained because of the escarpment geography and protected areas, so it cannot grow like other places

Marketing

- The BIA spends too much of marketing budget advertising locally when it should be spent regionally

**Customers**

- Dundas does not overly appeal to Millennials, the hipsters,

Events

- Could do without Cactus Festival
- Cactus Festival does not help business

City – Parking

- Too much parking enforcement



OPPORTUNITIES

BIA

- Should be an advocate for their membership
- BIA could offer assistance to businesses on improving sales such as training in social media
- BIA bring businesses together better to face competition
- Generally, BIA is doing a great job at beautification, marketing, promoting, running events, and advocacy
- May be an opportunity for BIA to be more involved in recruitment although there are very few vacancies

City

- City should look at investing money from Dundas in the Dundas community
- Increase money spent on lights, planters, etc.
- Some City by-laws are outdated and a hindrance to businesses (e.g., A frame signs)
- Should enforce King St being for retail businesses with side streets reserved for services and second floors for offices

Able to increase sales by expanding business operations

- Have to create more of an experience and blend what people are passionate about with what the store has to offer

Affordability

- Rents are cheaper than Locke St.

Businesses Desired

- More fast casual restaurants

Dundas

- Dundas will always have good demographics and good conditions for businesses to do well



Rethink Business Concept

- Need to rethink the store concept to adjust to changing demographics, visitors, and competition
- Store concept is not necessarily about price points
- Invest in store and redevelopment to keep it fresh and it helps

Hours

- May do extended hours in the summer

Isolated

- Good and bad components to being isolated
- There may be a need for increased density in Dundas to allow for continued population growth

Marketing

- BIA helped to understand advertising/marketing opportunities for my business and it worked very well

THREATS

- Isolated
- Risk being forgotten about as new business districts become stronger
- Each business district is nipping at the heels of Dundas
- Notice a change in the economy in the last few years where people are spending less



11.0 Strengths Weakness, Opportunities, and Threats

The following is the SWOT assessment for research related to all aspects of Downtown Dundas BIA.

Strengths

- Ideal main street in terms of length of street and critical mass of retail commercial space
- Good mix of retail that includes retail merchandise, food services, services, and food and beverage operators
- Local demographics that is sizeable, shops local, has high household income, and reflects relatively sophisticated shopping and cultural attributes ideally suited to a main street offering
- Very local customer in a sizeable trade area that has high disposable income and is well educated
- Investment in businesses to ensure they remain fresh, relative, and innovative
- Regional visitation that is often repeat and has similar high household income
- Isolated – Dundas has been able to maintain its unique identity in sea of change surrounding them

Weaknesses

- Hours of operation
- Developing events that appeal to the next generation of visitors and encourage return visitation
- Competitive pressure to appeal to young adults from a growing number of commercial districts such as James St. N. and the corresponding public relations benefits these new businesses receive.
- Increasing rents
- Isolated, difficult to grow town
- A maturing customer base

Opportunities

- Weekend and night time economy
- More daytime activity
- Redevelop business operations in light of time of day and day of week that visitors are in Downtown Dundas including Sundays and early evening
- How to keep innovative and new creative business ideas to remain competitive



Threats

- Shopping centre/plaza, power centre development around the periphery of Dundas
- Online shopping
- Downtown Burlington, Locke St. S. Ancaster Village, Downtown Waterdown, James St. N. etc. – however, more complementary and competitive business districts near one another is supportive. It creates competition for businesses which forces them to be innovative and just as competitive. It also attracts customers who want to visit several areas. In addition, it attracts residential who are interested in the complementary main streets within a short distance of their residence.

11.1 Comparison to 2009/2010 Recommendations

- Some of the issues from 2009/2010 continue to be issues in 2017. This includes BIA boundary expansion, BIA budget, and hours of operation. The BIA has made progress in terms of identifying the issues and developing evaluation for how they will address them.
- The BIA has been able to increase partnerships and work closely with the City of Hamilton. The result is an increased usage by businesses of the various incentive programs.
- Other issues have not been addressed such as streetscape improvements.
- The BIA is constantly reviewing their event programming.



- Specific recommendations and their status update from 2009/2010 to 2017 include:

2009/2010 Recommendations	2017 Status
Evaluate existing programs and resources and new initiatives and determine when it will be appropriate to increase the BIA budget and staffing	Progress and ongoing
Ensure committees are setting strategic goals and tactics to accomplish them	Progress and ongoing
Continue excellent communication programs and develop a needs assessment to ensure members are receiving information	Progress and ongoing
Expand BIA boundaries to logical shopping points but not to dilute the overall look and feel of the current area	Has been reviewed and is ongoing
Continue to develop programs to encourage businesses to stay open late and seven days/week	Progress and ongoing
Develop a one page retail recruitment piece selling the benefits of locating a business in Downtown Dundas	Not completed
Develop a series of ideas related to the types of businesses that may locate in key catalyst sites (e.g., former post office and former Shoppers Drug Mart)	These spaces are primarily filled
Evaluate loyalty programs and work towards increasing advocacy among frequent visitors and shoppers	Progress and ongoing
Participate in future City Initiative of the Dundas Community Node Secondary Plan	City has not initiated this to date. The Secondary Plan project is on the Planning Division's work plan. There is an increased working relationship between the City and the BIA
Begin to develop a plan for redeveloping sidewalks and streetscape	No plan has been put forward by the City for this
In coordination with the City, develop programs to better market the CPIG Façade Improvement Program to members	Done, from 2002 to 2008 approximately \$80,000 in grants and private investment contributions was registered but from 2010 to 2015 over \$580,000 in grants and private investment contributions was registered



Ensure the existing historical buildings are redeveloped to preserve their historical attributes (revisit the pros and cons of a Historical Conservation District designation with the City)	Not completed but the City updated applicable Zoning
Review where there is a need for re-evaluations of the design guidelines or if the current guidelines are sufficient	Not completed. The City has prepared new city-wide commercial and mixed-use zoning that will be applied to Downtown Dundas BIA.
Ensure marketing and wayfinding elements include artistic elements	City is to roll out wayfinding program, so it is an ideal time to revisit this
Concentrate marketing programs for the local market and use PR for longer distance visitation	Yes
Develop/review events that may include more arts and food related events as well as shopping events that are multi-generational in appeal	BIA has adjusted events as needed and will continue to evolve events moving forward
Continue to work with the City on programs that are beneficial to the BIA	Yes improved relationship



12.0 Downtown Dundas - Workshop Findings

The presentation of the background report findings was complemented with breakout sessions that focused on considering what the future identity and vision for Downtown Dundas could be and how that might out play in terms of business mix or physical improvements to the street. These findings should be reviewed when the next annual marketing plan is developed as food for thought.

IDENTITY DISCUSSION

During the identity breakout session, three questions were posed based around the current tag line: “Look What We've Got For You”

1. What are some of the words used to describe the identity/image of the Downtown Dundas BIA that it is currently putting out to the community?

- Small town
- Quality
- Walkable
- Loyal
- Quality service
- Safe
- Cute
- Fragmented
- Quiet (not bustling)
- Community oriented
- Good variety of businesses

2. As you know it, what are some words to describe the community's impressions of Downtown Dundas?

- Quaint
- Friendly
- Pretty
- Unique
- Charming
- Cultured
- Artsy
- Mini NOTL
- Clean
- Waterfalls
- Convenient
- Historic
- Nothing but parking tickets
- Walkable

During the session, the participants discussed the cause and effect of the connection between the two. The group indicated that the messages out from the BIA play a large role in how the community perceives them as a group of businesses. Having determined that, there was agreement that the messaging could adapt and change in the future which would cause a different outcome.



3. Moving forward, the participants would prefer to be described as or transition into the image of:

- More modern
- More youthful
- Trendy
- Specialty
- Affordable
- Little Different
- More exciting
- More diverse
- Night time bustling
- Family Friendly
- More jobs

The group concluded that Downtown Dundas's identity and vision is based on a number of elements:

- Extremely loyal visitors and customers
- Longevity of key anchor businesses
- Valley setting that is somewhat isolated from outside influences
- Heritage main street atmosphere that is complemented by events and programming activities

Words used to describe the brand story included:

- Lifestyle
- Charming
- Quiet
- Picturesque
- Sophisticated
- Ambiance
- Historic
- Stroll
- Quality
- Small town
- Valley
- Experience
- Arts, Culture, Recreation
- Specialty
- Unique

Moving forward, there are three main elements that Downtown Dundas could consider building on:

1. **Location attributes:** idyllic setting in the valley, surrounded by the escarpment, Cootes Paradise, greenery, and water bodies at the furthest western point of Lake Ontario.
2. **Business mix:** the combination of specialty and unique fashion, style, food and beverage, and food services that have both a very good local following and a destination appeal. Downtown Dundas proves that even local serving businesses can have a destination following if they are specialized and unique.
3. **Dundas Way of Life:** Customer engagement and experience: the extreme loyalty of the visitors to Downtown Dundas needs to be continually nurtured and the story of Dundas and the Downtown re-enforced as unique and non-replicable elsewhere. There is a Dundas way of life that needs to be communicated. As new residents move into Dundas from outside the area this factor becomes even more pressing.

All three are important but, the third element of the customer engagement and experience could be the key differentiator for Downtown Dundas.



Downtown Dundas has a loyal following. Going forward, as new residents move in, it is important for the BIA to continue to instill that sense of loyalty and belonging associated with Dundas. This includes the elements set out in the previous section:

- More modern
- Affordable
- Night time bustling
- More youthful
- Little Different
- Family Friendly
- Trendy
- More exciting
- More jobs
- Specialty
- More diverse

Ageless Dundas:

- Appeal to all generations from babies to seniors
- Reference to the resiliency of Downtown Dundas and its ability to adapt and evolve. There are businesses that have been in Dundas for multiple generations that continued to adapt and change to stay relevant and new and innovative businesses that have opened that are making a new mark for themselves.

Creatively Dundas:

- The long-standing arts, culture, and entertainment activities in Dundas are nurtured, funded, and part and parcel of Dundas' composition
- Everything is becoming culturally oriented including food, fashion, furnishings, etc.
- The emphasis on interesting and unique food including Picones, Mickey's Cheese, Horn of Plenty, Cumbrae's, Village Bakery, Bangkok Spoon, Il Fiasco, Detour, among others has been a key strength of Downtown Dundas is part of culture
- The culture of the business owners and staff is focused on providing personal service and customization to what visitors want. Engagement is a key differentiator and something that visitors and consumers want from retail.

Energetic Dundas:

- Dundas needs to shed its image as a town that rolls up the sidewalks at 5 pm
- BIA members want a more fun, energetic, funkier side to Dundas
- The recreation side of Dundas is significant including physical fitness, biking, yoga, hiking trails, adventure, cook outs, dance, etc.

Authentic: Heritage, Traditions

- The main street is full of historic buildings in an idyllic setting
- Celebrate heritage and honour the past but new developments are forward looking



- Ensures Dundas doesn't not become a parody of itself or too “disneyfied” and remains authentic

Other ideas from the workshop were discussed in terms of how the BIA can retain and attract customers in the future. Some of those ideas included both retention activities as well as marketing initiatives.

- The BIA could work on some exercises that focus on analyzing the aging merchant base and determining their risk/exposure to vacancies in the short and mid-term based on the perceived success of businesses and ages of owners.
- Alongside that exercise, the BIA could further develop a retail mix wish list
- Keep merchants engaged in the BIA by small task forces and small chunk commitments
- BIA needs to help grow the night time economy.
- Try to have a small win with the hours of operation – maybe a short, achievable project (i.e.: Thursdays until 7 or 12-3 Sunday afternoons.)
- Create a recruitment for business package in anticipation of retirements
- BIA could try to track more closely, the rental rates for business
- Create a stronger relationship with City staff to work on their change/potential growth



13.0 Downtown Dundas Action Plan

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

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

Each action item includes the following elements:

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

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

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

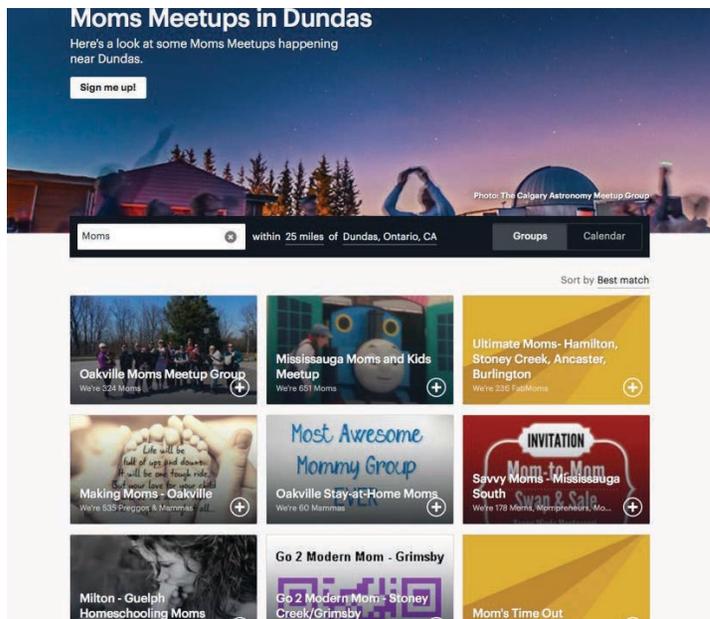
It is important to note that Downtown Dundas BIA has been very successful in the past. There are multiple indicators pointing to that success including low vacancy rates, a good business mix, repeat visitation, etc. The following suggestions are meant to stimulate conversation and review but for the most part the BIA programs and activities are achieving good success.

13.1 Organization

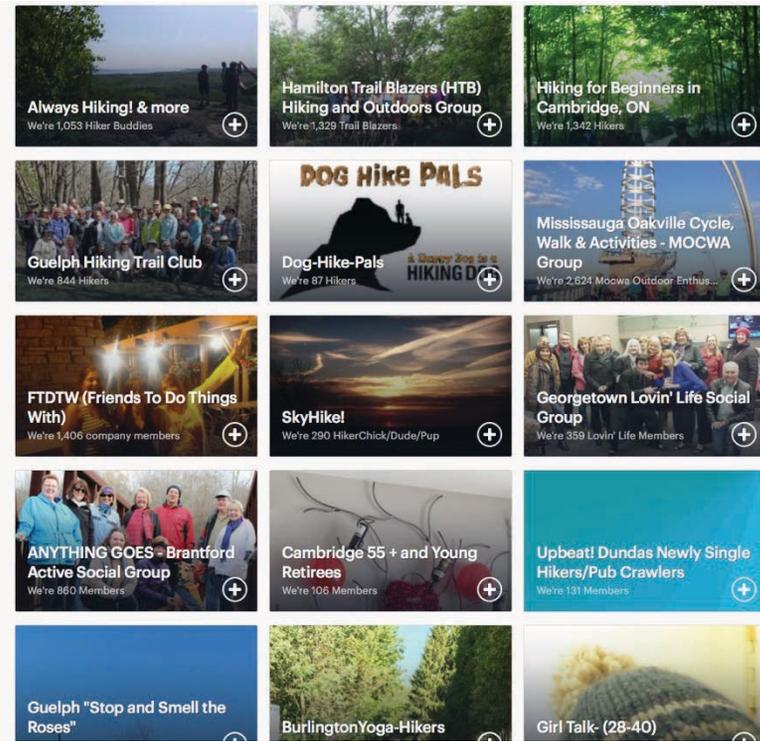
The BIA is a well-functioning organization that has been able to achieve success in terms of marketing, programming (e.g., Dundas Farmers' Market), and events as well as parking. This has been achieved through community building and engagement with members, local area residents, City of Hamilton staff, their City Councillor, and other partnering organizations.

Strengthening existing partnerships while adjusting and looking for new partnerships is key.

New groups that appeal to young families and recreation oriented groups such as:



A listing of mom related groups near Dundas



A listing of hiking and recreation clubs near Dundas.

HAMILTON HALTON BRANT *find your way to the heart of ontario*

ABOUT » CANADA'S 150 » SEE & DO » ITINERARIES » EVENTS » OFFERS » FUN FINDER » STAY » BLOG



ITINERARIES

- Family Friendly
- Adult Escapes
- Milton Tour
- Oakville Tour
- Burlington Tour
- Brantford Tour
- Hamilton/Dundas Tour**
- Get Away with the Guys
- Wine and Dine

f t YouTube RSS

Upcoming Events

« prev next » March 2017

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

hamilton/dundas tour

TASTE YOUR WAY AROUND CANADA'S BROOKLYN WITH THIS TWO-DAY TRIP

DAY ONE
Those looking to take their taste buds on an adventure have come to the right place. Hamilton is home to one of Ontario's hottest (and still growing) foodie scenes. Not only does the city boast excellent cuisine, it's craft breweries are taking the province by storm.

Start your day off at **Shawn & Ed Brewing Co.** Their slogan is "For Adventurous Mouths", so you know you're in for a treat. Step inside the beautifully restored curling/skating rink turned brewery (how Canadian!), and you'll be welcomed by friendly faces that can't wait to take you on a tour.

All of their brews use natural ingredients, and they aim to create sessionable and flavourful lagers; and unique Pinot Noir barrel aged ales. We're not kidding when we say it's love at first taste.

After having a **Lagershed** or **Barrelshed**, step out to downtown Dundas and check out some of the charming shops. Stop in for lunch at **Quatrefoil**, an upscale eatery within a historic home offering New Canadian cuisine and fine wine. For casual dining, try **Bangick Spoon** or **Detour Café**.



CALLING ALL CRAFT BEER LOVERS



Heart of Ontario suggested itineraries include stops in Downtown Dundas to eat, drink, and visit.



Organization/Governance – Recommendations

SHORT TERM				
Specific Task	Measurement	Actionable	Responsibility	Time Frame
Increase BIA budget	<ul style="list-style-type: none"> Budget should match the programming 	<ul style="list-style-type: none"> Continue to moderately increase the BIA budget through a combination of commercial redevelopment and modest increase At a minimum increase the budget with cost of living increases Source new sources of funding if shared parking revenue continues to decrease Work with the City of Hamilton to determine effects of levy changes on property owners 	BIA and Urban Renewal	<ul style="list-style-type: none"> Ongoing
BIA expansion	<ul style="list-style-type: none"> BIA should review BIA boundaries on a continual basis to ensure they reflect the BIA area of influence and similar business types 	<ul style="list-style-type: none"> Every two years review commercial changes in Dundas and the BIA boundaries BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Downtown Dundas BIA, are new businesses complementary or competitive, and should not do it solely for increased levy 	BIA and Urban Renewal	<ul style="list-style-type: none"> Ongoing
Develop social media policy	<ul style="list-style-type: none"> Policy developed 	<ul style="list-style-type: none"> Determine when and how you should reply to social media that affects the BIA and members 	BIA	<ul style="list-style-type: none"> By next AGM
Develop a BIA purchasing policy	<ul style="list-style-type: none"> Policy developed 	<ul style="list-style-type: none"> Rules and procedures for accountability 	BIA	<ul style="list-style-type: none"> Completed



MID-TERM				
Specific Task	Measurement	Actionable	Responsibility	Time Frame
Partnership Enhancement	<ul style="list-style-type: none">• Every six months monitor groups to add and/ or drop off if they are no longer relevant	<ul style="list-style-type: none">• If relevant - join group, post on their site,• Have other groups post to Downtown Dundas BIA website including accommodation (B&B and Airbnb)	BIA	<ul style="list-style-type: none">• Ongoing
Focus AGM and other meetings on positive learnings	<ul style="list-style-type: none">• AGM participation and feedback	<ul style="list-style-type: none">• Set AGM agenda that focuses on learning, education, and positive change happening• Bring in speakers on topics of relevance to BIA members including marketing techniques, grants and incentives, etc.	BIA	<ul style="list-style-type: none">• By next AGM



LONG TERM				
Specific Task	Measurement	Actionable	Responsibility	Time Frame
Enhance the member portal system to access BIA events	<ul style="list-style-type: none">• The BIA has a current calendar of events that they post to and members can review.• However, staff resources do not allow for continual monitoring.• Members and trusted organizations should be able to post their activities in an open system.	<ul style="list-style-type: none">• To ensure that businesses know when there are special functions happening in and near Downtown	BIA and major activity centres providing data on activities	<ul style="list-style-type: none">• Within 18 months



13.2 Economic Development

During the workshop break out session, participants were asked what types of businesses they would ideally like to see located adjacent to them. This type of questioning serves multiple purposes.

1. First, it does provide the beginning forms of a wish list. While the vacancy rate in Downtown Dundas is very low, it is a worthwhile assignment to have a sense of the specific types of businesses that may be suited to the area.
2. Second, it provides insight into the identity and vision for the type of Downtown environment that members would like to see.

Workshop participants noted three major business types:

1. Local community serving businesses that would help to create a complete street environment
2. Weekend and night time economy activity and fun and entertaining concepts
3. Destination oriented businesses

It is a combination of all three of these components that make up Downtown Dundas.

Complete Community – Local	Weekend and Night Economy – Fun and Entertainment	Destination
<ul style="list-style-type: none"> • Hardware store • Small appliance electronics • General merchandise 	<ul style="list-style-type: none"> • Movies • Bands in the summer • Black box theatre • Martini bar • Wine bar • Funkier – food truck type food service • Tapas bar • Fast casual restaurants • Communal dining (more Vancouver) 	<ul style="list-style-type: none"> • Hotel (although noted that Airbnb serves a greater role in the community) • Noted that any business can become a destination but generally those that are highly specialized – but strength in fashion, recreation and sporting goods, other leisure goods, food and beverage, health and wellness

Role for Professional Services

- Professional services - Preserve ground level retail areas for non-professional businesses (locate them up on upper levels and side streets)
- The goal is not to preclude them entirely as they do bring in valuable customer traffic into the Downtown area
- The City of Hamilton does regulate professional services through the use of parking requirements that are higher than other retail (passively regulated).

Destination Type Businesses

- To be a destination would require increased level of consistent hours
- The respondents noted that anything can become a destination business if positioned properly

Alleyway and Side Street Activation

Participants noted that the Downtown needs more retail space at different rent levels. At present, businesses have expanded to the alleyways such as Red Door among others. As rents increase along King St. allowing new and innovative businesses spaces to lease will be important.



Melbourne, Australia has great examples of activating areas through the use of alleyways and laneways



Melbourne, Australia alleyways and laneways converted to retail spaces

Public Art Alleyways

Overhead and wall art installations can be provided to create interest and buzz but they can provide increased night time activity if associated with lighting.



An evolving art installation program combined with retail activities keeps the area interesting, fun, creative, and innovative



Carnaby St., London constantly changes the light programming along the street in a fun and funky way

Succession Planning

As many of the businesses have been in Downtown Dundas BIA for a long period, the topic of succession planning for businesses becomes more prevalent (see more details in Marketing section). The goal is for the BIA to be a resource if the business owners want it. This is a very delicate topic and should be handled with discretion and tact.



Economic Development Recommendations

SHORT TERM				
Specific Task	Measurement	Action Item	Responsibility	Time Frame
Develop a realistic wish list of commercial businesses Ensure ideal business mix stays within the parameters set out as per the Downtown Dundas vision and to ensure a healthy mix of complementary businesses (no one business category should dominate over the others)	<ul style="list-style-type: none"> • Maintain retail merchandise at current range of 25% to 30% (currently 27%) • Maintain food services at minimum 15% to 20% (currently 16%) • Maintain food and drug retail to minimum 10% to 12% (currently 10%) • Ensure vacancy remains under 4% (currently 2%) • Add more recreation and fitness (e.g., yoga – this can be indoor or outdoor) 	<ul style="list-style-type: none"> • Create a realistic list that can be posted to the public • Use the list to garner ideas for identity and vision • Associate wish list with key locations that would increase pedestrian flow through the whole Downtown and increase dwell time (e.g., alleyways and side streets, etc.) • Monitor vacancy rebate program for impact on businesses and members 	BIA	<ul style="list-style-type: none"> • Immediate and ongoing



MID-LONG TERM				
Specific Task	Measurement	Action Item	Responsibility	Time Frame
Assess succession planning opportunities and measures to adjust	<ul style="list-style-type: none"> BIA to make themselves aware of those businesses that may be retiring and in need of assistance and customize tools to address those needs 	<ul style="list-style-type: none"> BIA to offer any potential one-on-one or group member assistance for those businesses looking for a change This should be discreet but also frank. Work collaboratively with businesses to ensure any potential transition is smooth Can include search for investors, marketing properties, marketing post transition, etc. Develop workshop programs to review opportunities and interest from members 	BIA and Urban Renewal	<ul style="list-style-type: none"> Ongoing
Encourage continued use of grants and incentives and ensure buildings and public spaces are retail friendly	<ul style="list-style-type: none"> Monitor grant and incentive usage 	<ul style="list-style-type: none"> Continue to monitor usage of grants and incentives Have City of Hamilton staff conduct education programs on new incentives and how to apply for them Encourage retail friendly building design 	BIA and Urban Renewal	<ul style="list-style-type: none"> Ongoing
Pop up shop	<ul style="list-style-type: none"> Small pop up store identified 	<ul style="list-style-type: none"> The BIA could develop one site for a pop up shop that rotates on a continual basis (or can be just for Christmas season) Issues such as rent, insurance, and licensing need to be identified 	BIA and property owner and Urban Renewal Utilize the City of Hamilton's Temporary Business License Program	<ul style="list-style-type: none"> 2 years from start

13.3 Physical Improvements

Activate Alleyways and Laneways

- See previous section on economic development suggestions

Public Art Installations

Create more dual purpose art and streetscape elements such as:

- Bike racks
- Seating
- Overhead lighting

BIA to work with City of Hamilton Public Works, art centres, and artists to create a juried manner of increasing public art in the area that is multifunctional. This could include decorative bike racks, seating, etc.



Public seating in the shape of stones



Bike racks as art installations



Public waiting areas (bus shelters) that include bike racks



Literacy oriented bike rack and art installation

Lighting

- Update lighting studies to match the vision of Downtown Dundas including elements of safety, night time shopping, patio dining, etc. Lighting should be bright enough for safety but also used to highlight window displays and people sitting on patios.

Parking

- Review on-street parking needs vis a vis potential patio opportunities. This may need some pilot testing with a limited number of patios to understand the impact on vehicular visitation, change in parking usage, etc. At present the Downtown Dundas BIA has opted in to the parking/patio program. However, the program should be evaluated on a continual basis. Issues that may arise that may need to be addressed include design criteria for patios (retailers may be required to submit detailed design drawings and stay within prescribed design rules that could include colours, materials used, height, etc. beyond what is already prescribed by City rules). Other issues include noise along King St., permit costs, etc.
- City and BIA to continue to coordinate joint long-term parking behind King St. to ensure this parking remains open and accessible to visitors. Assess the impact if a privately-owned portion were to be redeveloped and how the parking could be accommodated.

Wayfinding

- Review and improve physical and digital wayfinding into Dundas. This includes signs at York Rd.
- The BIA has already improved Google maps wayfinding.



Physical Improvement Recommendations

MID-LONG TERM				
Specific Task	Measurement	Action Item	Responsibility	Time Frame
Review parking needs in light of patio program, on-street needs, changes to technology for paying, monitoring, and enforcement	<ul style="list-style-type: none"> Measure the effect of losing one parking space on visitation, total parking revenue collected, and impact on sales of businesses using the parking space 	<ul style="list-style-type: none"> Test pilot parking patio program to determine if it is a net positive for the Downtown (were sales increase for some businesses sufficient to offset potential lose to other businesses) As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones 	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> Patio administration program for Downtown Dundas BIA is completed BIA should meet with Parking and Transportation on an annual basis to review changes to parking and loading
Review physical and digital wayfinding	<ul style="list-style-type: none"> Increased visitation Reduced wayfinding complaints 	<ul style="list-style-type: none"> Review with City location of wayfinding signage and determine ways to increase signage to Dundas and Downtown Dundas Constantly update any digital wayfinding elements 	BIA and City	<ul style="list-style-type: none"> Review annually
Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases	<ul style="list-style-type: none"> Conduct a study 	<ul style="list-style-type: none"> Work with City of lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy 	BIA and City of Hamilton	<ul style="list-style-type: none"> One year



Increase dual purpose streetscaping and public art	<ul style="list-style-type: none">• Number of installations	<ul style="list-style-type: none">• Work with City of Hamilton Public Works to create a roll out plan, how it will be juried, sponsorship/ fundraising, and capital cost allocation	BIA, City Public Works	<ul style="list-style-type: none">• 2 years and ongoing
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13.4 Marketing

MARKETING SWOT

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

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Unique area in which to differentiate yourself from others and have a unique POV from a marketing perspective• Good level of engagement on Facebook• Engaged community• Good variety of events• Loyal customers	<ul style="list-style-type: none">• Undifferentiated positioning/tagline: <i>Discover Downtown Dundas</i>• Difficult to understand target audience prioritization, particularly on the website• Brand isn't defined well enough from an identity perspective• Outdated look and feel on the website• Lack of photography to showcase the beauty of the escarpment and the historic nature of the Town• Limited use of all available social media channels• No link on the website to your Twitter account• Tweets are long and more like Facebook postings• Small marketing budget (half of which is allotted to Christmas)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Getting your "brand house" in order to best communicate your unique selling proposition• Capturing your differentiation and taking the brand to a new level of expression	<ul style="list-style-type: none">• Other neighbouring Hamilton BIA's that are well defined and more sophisticated in their brand identity and marketing initiatives



WEBSITE AND SOCIAL MARKETING REVIEW

Domain: www.downtowndundas.ca

This Domain was registered Friday, August 10, 2001

This Domain expires Thursday, August 10, 2017

Evaluation

The website was reviewed under the following criteria headings:

- Purpose
- Content
- Design
- Authorship

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

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

Purpose

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

Content

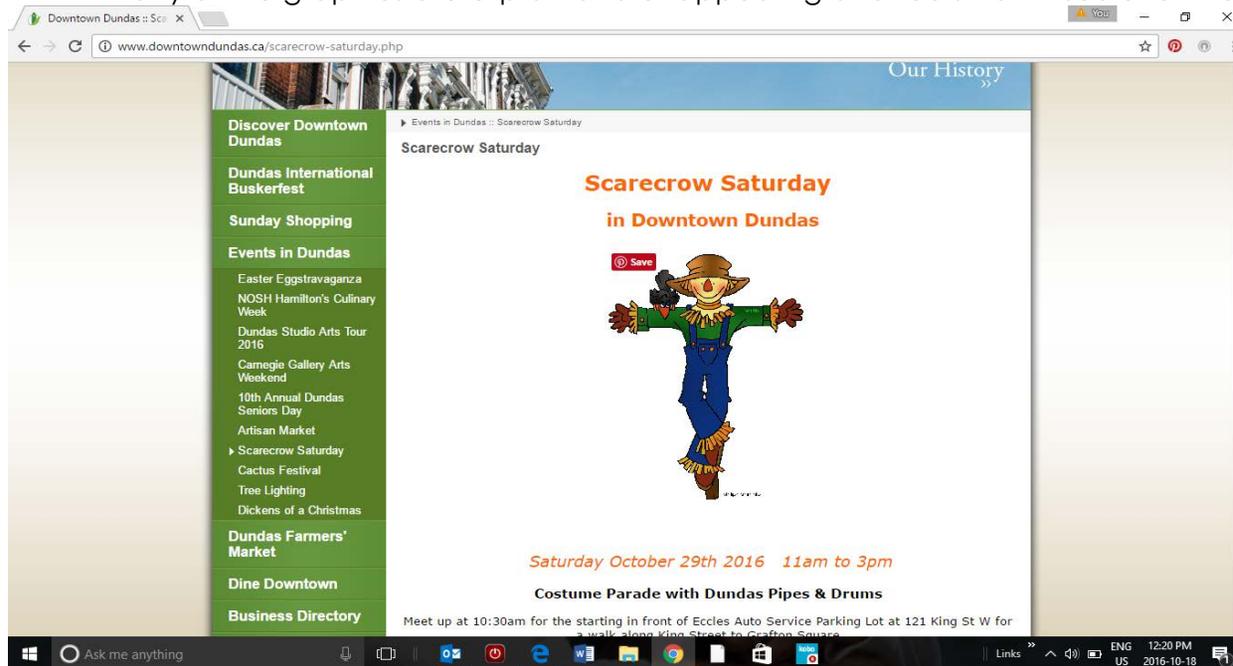
- The content is easy to read and understand.
- There is an outline of topics provided allowing users to find topics and move among them easily.
① ② ③ ④ ⑤
- The spelling and grammar is always correct.
- The information is current and accurate.
- The information is updated regularly.
 - There are regular updates but only to the business directory. The site structure has not been updated since 2012.

- The section titled “In the News” has not had a post since 2010
- The Buskerfest information is from 2015

- ☑ There are more links to information on the topic provided.
 - The graphics used on the site don't show much activation. They show a lot of buildings but not much in the way of people and fun except for the “Share your shots” section

① ② ③ ④ ⑤

- ☑ Graphics are relevant and appropriate to the topic.
 - Many of the graphics are clip art and unappealing and too small in scale for the website



- ☑ The site offers information that cannot be found anywhere else.
- ☑ The site links to the client Facebook account.
- ☑ Each website page has a defined heading.
- ☑ The site links to the client twitter account.



Design

- The information is easy to use and find.
- The text is easy to read and not cluttered.
 - While this is true, there is too much text. Messaging on the website should be short, concise and interesting. There is also duplication of information on the site which can be confusing for the end user.

① ② ③ ④ ⑤

- The site design is appealing for the intended audience.
 - In general, the website is old and tired.
- The links pages are well organized and appealing.
- The website loads in a reasonable amount of time.
- This website is not optimized for printing.
 - The business directory could be a printable document and generated in real time.
- The website is mobile friendly and easily navigates by mobile phone.
 - The site is not optimized for viewing on a smartphone or tablet.

Authorship

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

AODA Compliance

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

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



Social Media

A review of food service ranking sites such as Yelp and Zomato reveal:

Yelp

- Lunch in Hamilton
 - 1. Detour
 - 7. Bangkok Spoon
- Dinner in Hamilton
 - 8. Quatrefoil (just outside the BIA boundary)

Zomato

- Lunch Near Dundas – Popular
 - 9. Thirsty Cactus (just outside the BIA boundary)
- Lunch Near Dundas- Rated
 - 11. Quatrefoil (just outside the BIA boundary)
- Dinner Near Dundas – Popular
 - 9. Thirsty Cactus (just outside the BIA boundary)
- Dinner Near Dundas – Rated
 - 11. Quatrefoil (just outside the BIA boundary)

Findings

- Downtown Dundas food service operations achieved top mentions however, for the Zomato rankings for food services “near Dundas” there should be more operations receiving higher ratings. For Zomato, no Dundas businesses were in the top 10 when searching under places to eat in Hamilton. These businesses were listed as the consumer would not be able to differentiate whether these businesses are in the BIA or not and they are within the zone of influence of the BIA.



MARKETING RECOMMENDATIONS

These recommendations are intended to give you a high level POV on things to consider as the BIA develops their next strategic plan and marketing plan. Three Sixty Collective recommends that Downtown Dundas BIA use the SMART system noted in the appendix to ensure that your planned activities are **specific + measureable + achievable + realistic + targeted**.

BASICS – now	SHORT TERM – 1 year
<ul style="list-style-type: none"> • Brand Blueprint exercise (see appendix) • Creation of a tagline to add to all communication media • Target Audience prioritization exercise including large employers located near the BIA such as McMaster University 	<ul style="list-style-type: none"> • Update the current website – clean it up, add photography, update content, manage it monthly • Create a stronger profile of the business community – who they are, what they offer, how they are unique • Add an Events Calendar onto the website • Evaluate your social media channels and determine what resources you have to support them and which will garner the biggest impact (not necessarily eliminating traditional channels such as post card drops) • Add a welcome kit for new residents
MID-TERM – 2/3 years	LONG TERM – 5 years
<ul style="list-style-type: none"> • Logo re-design • Create a Brand Style Guide • Evaluate member communication and create a new, regular way of connecting • Create an investor attraction package 	<ul style="list-style-type: none"> • New website re-design • Weekend and Evening marketing strategy (at present the emphasis is still on weekends (Sunday included) but BIA to increase awareness of evening activities such as dining, entertainment, fitness/recreation, etc.)



14.0 Planning Context

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

14.1 Introduction

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

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

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

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

14.2 Official Plan

Hamilton's Official Plan designates the Downtown Dundas BIA as "Mixed Use - Medium Density Area". This designation permits a full range of retail, service commercial, entertainment and residential accommodation in structures up to six storeys in height. Rezoning applications for up to eight storey structures may be approved provided that the structures are stepped back from adjacent properties and the street and don't have adverse shadow impacts on adjacent residential uses (see 4.6.8 for detail).

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



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

Implications for BIAs

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

14.3 Zoning By-law

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

New zoning designations are being proposed in the BIAs. For Downtown Dundas BIA the C5a designation is the only one that applies.

The Mixed Use Medium Density – Pedestrian Predominant (C5a) Zone:

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

- Drive-through facilities are prohibited (policies for considering rezoning applications to permit drive-throughs are specified in Section 4.6.29 of the Plan as described above),
- The maximum setback from the street line is 3.0 metres,
- The minimum building height is two storeys (7.5 metres); the maximum is six storeys.
- The height of the first storey is to be between 3.6 and 4.5 metres
- Large office and commercial recreation uses are not permitted (maximum is 2500 square metres)
- The minimum width of the ground floor façade on interior lots is 75% of the width of the lot frontage. For corner lots, the minimum width of the ground floor façade is 50% of the lot frontages on the main street plus flanking street.
- A minimum of 60% of the ground floor façade is to be composed of doors and windows.



- Day nurseries, dwelling units, and places of worship cannot be located on the ground floor except for their access areas and accessory office and utility areas.
- Beverage making establishments, catering, commercial entertainment and recreation, financial establishments, microbreweries and repair services are only permitted on the first storey of buildings.
- Commercial parking facilities are only permitted if wholly contained within a building and are not permitted on the first storey.
- As noted, there are property-by-property exemptions that apply across the entire City for a range of goods and service uses.

Implications for BIA

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



14.4 On Street Patio Program

Staff recommendations to approve a “permanent on-street patio program” were considered and approved by City Council on March 8, 2017. This follows up on a Pilot Program implemented in 2016. The on-street patio program will enable restaurants in BIAs throughout Hamilton to apply for permits to locate outdoor patios in on-street parking spaces from May 1 to October 31 each year. Each on-street patio location is limited to occupying one parking space. The BIA must endorse the application in writing. Each BIA has the right to limit the number of on-street patios in its area.

Implications for BIA

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



15.0 Trends

Omni-channel

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

The implications include:

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

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

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

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

Smaller Retail Formats

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



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

Buy Low Buy High

It used to be that women primarily would shop for some higher quality items and mix and match with value conscious retailing. Today, both men and women are shop for some higher quality pieces that they match with basic items. For example, male office workers have indicated that they will spend money on a high-quality suit but will go to retailers such as Joe Fresh to buy their dress shirts as they tend to go through them on a frequent basis.

Food Shopping Throughout the Week

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

Mobile

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

Sold Retail Principles Still are Key

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

Leadership is King

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



Demographics is Destiny

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

Technology Driven Innovation

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

- Sensor based technology
- Big data
- Online

Sensor Based Technology

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

Big Data

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



APPENDIX



APPENDIX: BIA Marketing Planning - CHECKLIST

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



BIA Marketing Planning - GUIDELINES

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



ONE PAGE CALENDAR	<ul style="list-style-type: none">• Yearly activities plotted• Easy reference for the whole organization• More likely to follow it if it is not a big, complicated document• For each strategy note the tactic + budget + timing + resources + success measurement
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BIA Marketing Plan - CHECKLIST

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



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

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