



**International Village BIA  
Commercial Market  
Assessment Update**

**FINAL  
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## EXECUTIVE SUMMARY



## Executive Summary

### Introduction

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

The process included:

- Review of movement into and through the BIA
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review including visitor profiles
- 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. The suggestion action plan items included in this report are based on that workshop.

**International Village BIA**





## **SWOT**

### **Strengths**

- Growing residential and mixed-use buildings that support local neighbourhood concept
- Increased visitation to International Village overall
- Increased investment by tenants and property owners
- Increased daytime and nighttime activity that builds an 18/7 type retail commercial economy
- Intimate historic street setting along King St. E. of primarily intact heritage buildings

### **Weaknesses**

- Lower household income in the nearby trade areas
- Some vacancy issues but new investment as well (as noted, the vacancies tend to be concentrated in a few buildings that are difficult to lease)
- Illegal business activity (cannabis retailers) and issues related to perceived and real safety and security issues
- Concern over the loss of some surface parking lots to redevelopment that are not replaced in structured parking garages in mixed-use developments

### **Opportunities**

- Local neighbourhood serving retail and commercial
- Increased creative businesses for live, work, play
- An eclectic mix of businesses that are specialized in their own field
- LRT that unlocks the value of nearby land for increased redevelopment

### **Threats**

- Increasing competition for food services in other main streets means that International Village is less reliant on food services and international food services as part of its identity and vision
- Increasing online and technology usage for retailers means that International Village businesses need to embrace these changes as well



## Changes in Recommendations from 2011 to 2017/2018

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

### Changes in Recommendations from 2011 to 2017/2018

<b>2009/2010 Suggested Recommendations</b>	<b>2017/2018 Status Update</b>
Change in BIA Executive Director provides an opportunity to review and re-affirm vision	Modifications to vision were made but the upcoming LRT construction is an ideal time for a significant brand and identity refresh
Develop roles and responsibilities and organizational needs	Continue to search out and evaluate partnerships BIA has increased participation on a number of committees
Continue to market programs that benefit and assist businesses	Work in progress but the redeveloped CPIG incentives need to be marketed better to businesses by both the City and all the Hamilton BIAs
Increased private sector and public sector investment	Work in progress
Increase internal communications	Work in progress
Continue to sit on City committees that are relevant to BIA	Constantly adjusting staff resources. BIA may hire additional staff to assist
Where possible increase BIA budget especially when there is a redevelopment	BIA budget has increased slightly but not in line with inflation or other Ontario BIAs nor with new development
Consider BIA expansion	BIA to consider this post LRT
Ensure committees are working on strategic initiatives, Consider an LRT specific committee	A re-alignment of committees has been ongoing through the use of Page by Page Consulting.
LRT	LRT is an on-going program and will be until there is a finalized contractor and a construction calendar submitted.
Property owner and broker feedback process	Attempted and is an ongoing process



Determine which parcels have a high catalytic value and target them for redevelopment	Ongoing process
Leasing information package	BIA website has comprehensive information and this report will be posted to the website as well
Review regulatory reform and incentives	Have participated in Downtown Secondary Plan, LRT, Hospitality task force, Clean and Safe taskforce, CPIG redevelopment, HABIA re-alignment, among others
Develop parking promotional programs	Ongoing process
Develop programs to help economically disadvantaged residents but at the same time discourage panhandling and loitering	BIA is currently working with the local neighbourhood associations and this is a strong mandate for these groups
A thorough economic impact assessment of LRT construction and post-construction – including wiring, landscaping, and on-street parking	Several studies have been conducted to date on the value and uplift in value due to LRT. Other elements such as landscaping and on-street parking require final confirmation from the selected firm awarded the contract
Review design guidelines and signage requirements so that they reflect an image of International Village and gateways	Signage and wayfinding are being developed for the BIA and will be addressed in LRT negotiations
Use social media for increased direct marketing	Yes
Improve marketing linkages to Theatre Aquarius	Yes
Improve parking information on the website	Yes
Post parking information on website and Twitter	Yes
Encourage businesses to use the Village in marketing materials	Ongoing process
New business openings should be marketed by BIA	Yes
Increased event ideas for Ferguson Station	Ongoing process
Develop a marketing program to increase loyalty	Ongoing process





## Vision

### Previous Vision

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

- Enhance its appeal as an urban eclectic village complete with destination food retailers and food services
- Appeal to local residential population nearby
- Infill specialty retail that completes the urban village atmosphere

International Village BIA's vision will continue to evolve based on an eclectic village atmosphere. The intimate street setting along King St. E. will continue to serve the BIA well as an interesting place to set up a business. The evolving nature of the greater Downtown housing demand is causing increased pressure on housing located in close proximity to International Village BIA including areas such as Stinson and Corktown. International Village is a key gateway into Downtown and will serve as mix of residential, office, entertainment, and institutional rich area. Local neighbourhood serving goods and services that cater to residents and workers combined with infill opportunities based on regional demand.

The current BIA vision statement is:

**We are Hamilton's 1<sup>st</sup> BIA, home to a spirited, attractive and creative community. We offer a unique and vibrant mix of businesses - #TheVillage in your downtown.**



## **International Village BIA Action Plan**

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

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

Each action item includes the following elements:

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

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

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



## **Organization**

### **STRATEGIES**

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

### **RATIONALE**

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

### **DESIRED IMPACT**

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

### **HOW TO ACCOMPLISH**

The following highlights key suggested recommendations for the International Village BIA organization. It is noted that Page by Page Consulting is continuing to work with the BIA organization on strategic planning, visioning, governance issues, and positioning the organization so that it can address future issues, challenges, and opportunities.



### Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Hire marketing staff person	<ul style="list-style-type: none"> <li>Job description, budget allocation</li> </ul>	<ul style="list-style-type: none"> <li>Support the organization through LRT and focus on marketing aspects</li> </ul>	BIA	Immediate
Increase internal communications	<ul style="list-style-type: none"> <li>Commit to key deliverables such as monthly email newsletter, weekly email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only</li> </ul>	<ul style="list-style-type: none"> <li>Develop a calendar of communications correlated to different mediums</li> <li>Ensure BIA database is current – if not, work with City to get contact information</li> </ul>	BIA Executive Director	Immediate and ongoing
Increase BIA Budget	<ul style="list-style-type: none"> <li>Minimum growth with inflation and allows natural increase with the total assessment increase</li> </ul>	<ul style="list-style-type: none"> <li>Assessment value of BIA and keep the budget at a core rate compared to assessed value (look at past assessment values)</li> <li>Consider a larger increase in line with normal BIA duties and LRT duties</li> </ul>	BIA with assistance from City of Hamilton	Immediate to Short Term



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



		<p>changes are merited</p> <ul style="list-style-type: none"> <li>• BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to International Village BIA, are business competitive or complementary, and pros/cons on BIA levy</li> </ul>		
<p>Focus AGM and other meetings on positive learnings</p>	<ul style="list-style-type: none"> <li>• AGM participation and feedback process</li> </ul>	<ul style="list-style-type: none"> <li>• Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA</li> <li>• Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z,</li> </ul>	<p>BIA</p>	<p>By next AGM</p>



		grants, and incentives, etc.		
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## **Economic Development**

### **STRATEGIES**

International Village BIA will provide an opportunity for:

- Retail and commercial businesses to continue to thrive and expand to ensure that International Village businesses and the greater Downtown is an economically sustainable community (employment for local residents and fiscally sustainable tax base)
- Attract high-quality workforce to live and work in International Village and in the greater Downtown Hamilton area (live work play)
- Nurture local entrepreneurs to start up and expand new businesses in the BIA
- Attract outside investment

### **RATIONALE**

- Allows for new business sectors to grow and take advantage of International Village and in the greater Downtown Hamilton attributes including higher density live and work clusters and high quality of life attributes
- Allows International Village BIA businesses to stay competitive and innovate.
- Increases real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of BIA.
- Creates a diversified economy.

### **DESIRED IMPACT**

- Diversified retail and commercial economy in select growing and sustainable business sectors.
- Depth and specialization in each of those sectors so that they continue to grow and draw further investment.
- Local neighbourhood supporting retail goods and services to support the growing residential density of young professionals and empty nesters.
- Creative employment opportunities for local International Village and Downtown residents (including youth, young professionals, families, active seniors, and empty nesters).





## **HOW IT GETS DONE**

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

### **Five Key Strategies**

The economic development plan follows five key strategies to be carried out by the City and the BIA:

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



### **Identify Opportunities, Gaps, Strengths to Build Upon**

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

- Local partner(s) active in the sector and interested in participating (time and resources) in its expansion.  
Appropriate partners might be:
  - local businesses interested in their own expansion by increasing local critical mass in the industry, strengthening their supply chain and the market for their services/products, building the local labour pool of specific skills, etc.
  - institutions such as Hamilton Tiger Cats, McMaster University (although not in the BIA), owners of cultural venues (Theatre Aquarius), who are interested in partnering
- Good regional growth prospects; this is best assessed at a fine-grained level since very narrow and specific industry niches often present the strongest growth opportunities



### Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Education Centre	Support expansion of programming at McMaster Downtown campus locations into International Village and / or attract other specialized post-secondary schools and research institutes Support student recruitment	<ul style="list-style-type: none"> <li>• Work in partnership with universities and schools</li> <li>• Identify potential expansion opportunities and pitch International Village, Downtown, and Hamilton's lifestyle, walkable in the greater Downtown, competitively priced available floor space and vacant lots, student infrastructure and testimonials</li> </ul>
Incubator	Small-scale value-added local production: food, agriculture, artisan manufacturing, on farms and in Hamilton; retail distribution in Hamilton and International Village stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> <li>• Build off of the success of the mustard factory</li> <li>• An underdeveloped resource that diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in a supportive ecosystem)</li> <li>• Develop in partnership with the value added agricultural/food based community, artisans, existing micro-businesses, local institutions and with potential provincial support</li> <li>• Build a "food entrepreneurship ecosystem" tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Farmers Markets, co-tenancy in stores, help to organize food stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.), brew pubs, etc.</li> <li>• Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts Council) to explore their needs and best practices and</li> </ul>



	Description	Rationale and Tactics
		<p>build strategy and ecosystem to support their growth. Tactics parallel those described above for food.</p> <ul style="list-style-type: none"> <li>• Start by identifying Hamilton residents currently making and selling artisan products (e.g, Etsy).</li> <li>• Encourage craft type markets</li> </ul>
Digital and Creative	Creative industries - website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> <li>• Prerequisite: high-speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity.</li> <li>• Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.</li> </ul>
Arts & Culture	Performing and visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> <li>• Leverage assets in the International Village BIA such as Theatre Aquarius and Ferguson Station, and those nearby such as Hamilton Arts Council, Hamilton Place, Art Gallery of Hamilton, Library, Jackson Square, etc. as venues for display and performance.</li> <li>• Partner with venues including cafes and restaurants and local arts organizations.</li> <li>• Pursue two-stream strategy: 1. Nurture and develop opportunities for local artists and performers to earn income and gain exposure to broader audiences (tactics similar to those described for artisans); 2. Support enhanced programming, festivals and exhibits (temporary and permanent) at venues. Include both locally based programming and attraction of touring groups/performers/exhibits and festivals.</li> <li>• Synergy with tourism development. Build a reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community)</li> <li>• Enhance the night time economy</li> </ul>



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



## Key Retail Sector Opportunities

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

### King St. E.

**Location:** King St. E. from Mary St. to West St.

**Niche:** Eclectic Village

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

#### Requirements for Success:

- Walkable street
- Key access point and multiple access points from nearby residential to King St. E. – streetscaping support that pulls local residents into King St. E.
- Use of urban plazas for people gathering and community building
- New gateways to Downtown with LRT route
- Some entertainment-oriented aspects with bright lights, lit up buildings, artwork, gateways
- Places for ephemeral, constantly changing, performances, art, etc.
- Locations for pop up music venues both small and large
- Better facades, large windows, limited use of window barriers, ground level animation

#### Commercial Mix:

- Grocers, specialty food, greengrocers, pharmacy, drug store items
- Breakfast and brunch places
- Cafes, coffee, tea
- Quick casual restaurants and cafes (breakfast, cafes/lunch, coffee/tea, and quick casual dinner), blurring such as game cafes (already exist), barber shops with alcohol service, etc.
- Night time economy restaurants, pubs, hangout places, brewpub
- Other neighbourhood retail and services – hardware store, beauty services, barber shops, dry cleaners, travel agents, bakery, pet supplies, veterinary services, medical and dental services
- Specialty leisure-oriented retail including sportswear, activewear, (e.g., specialized sporting goods store with a mini basketball area set up inside), book and music stores,



- Creative offices on upper levels
- Fitness, creation, dance, martial arts on upper levels
- Entertainment such as small movie house on upper levels
- Add in library, community centres, and potential for another performing arts venue (cluster performing arts together)

### **Main St. E.**

**Location:** East Mary St. location

**Niche:** Highway commercial and transformed into mixed-use higher density

**Target Markets:** Daytime office workers and visitors, local residents, regional visitors, pass by traffic – related to those who want visibility

#### **Requirements for Success:**

- Create a two-sided retail street through infill redevelopment opportunities
- Build retail in close proximity to the lot line with parking at the rear
- Signage, windows, entrances, and ground floor retail heights that match the look and feel of a retail street that has high visibility
- Opportunities for side street, rear, and upper-level patios
- Upper levels used for creative offices that blend work and eating as well as those businesses that blur lines between office and retail (e.g., a coffee shop that allows shared work environment)
- Large, good quality streetscape materials with wide sidewalks

#### **Commercial Mix:**

- Office, residential, institutional and retail mixed use
- Increased entertainment
- Local serving and office worker type goods and services including grocers, cafes, fast casual restaurants, dry cleaners, travel agents, florists, etc.
- Unique restaurants, cafes, coffee/tea, breweries,
- Shared work and retail spaces
- Blurred retail categories
- Creative offices on upper levels



## **King William Street**

**Location:** East Mary St. location

**Niche:** Entertainment focus

**Target Markets:** entertainment visitors and attendees, daytime workers, local residents including new residents moving into the new housing nearby

### **Requirements for Success:**

- Extend King William success from west of Mary to east of Mary
- Infill with mixed use residential, office, and entertainment focused retail (including food services)

### **Commercial Mix:**

- Office, residential, institutional and retail mixed use
- Increased entertainment and experience based retailing including food services with patios as well as specialty food
- Local serving and office worker type goods and services including grocers, cafes, fast casual restaurants, dry cleaners, travel agents, florists, etc.
- Unique restaurants, cafes, coffee/tea, breweries,
- Shared work and retail spaces
- Blurred retail categories
- Creative offices on upper levels

The remaining strategies are based on the suggested recommendations.





## Economic Development Suggested Recommendations

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



		<ul style="list-style-type: none"> <li>• Hamilton expatriates (“Come Back to Hamilton” campaign)</li> <li>• GTA residents</li> <li>• Independent and small chain franchises</li> <li>• Graduating post secondary students</li> <li>• Others</li> </ul>		
Strengthen infrastructure	<ul style="list-style-type: none"> <li>• Business turnover decreased</li> <li>• New business openings</li> </ul>	<ul style="list-style-type: none"> <li>• New streetscape plans</li> <li>• Investment in WiFi in Downtown including International Village</li> <li>• High-speed internet and broadband width</li> <li>• Parking strategy</li> <li>• Transit strategy</li> <li>• Incubators and a complete range of office tenancies</li> </ul>	BIA and City	Mid to Long Term
Make Investment easier	<ul style="list-style-type: none"> <li>• New business openings</li> <li>• New mixed-use developments</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce costs, risks, and barriers to investment including</li> </ul>	<ul style="list-style-type: none"> <li>• City and BIA</li> <li>• BIA to educate themselves and attend training on development pro</li> </ul>	<ul style="list-style-type: none"> <li>• Medium Term</li> </ul>



		<ul style="list-style-type: none"><li>• Competitive tax rates, development friendly approval processes, market current opportunities</li><li>• Develop sector-specific recruitment materials</li><li>• Review all incentives and marketing of incentives against the economic development plan</li><li>• Increased residential and office mixed-use developments</li></ul>	<p>formas and industry terms to ensure the BIA understands key redevelopment issues and opportunities</p> <ul style="list-style-type: none"><li>• BIA can support development opportunities and commission economic impact studies that support redevelopment with public parking</li></ul>	
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## **Physical Improvements and Programs for Enjoyable Shopping**

### **STRATEGIES**

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

### **RATIONALE**

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

### **DESIRED IMPACT**

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

### **HOW TO ACCOMPLISH**

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



### Physical Improvement Suggested Recommendations

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



		<p>increase signage to Downtown</p> <ul style="list-style-type: none"><li>• Constantly update any digital wayfinding elements</li></ul>		
<p>Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases</p>	<ul style="list-style-type: none"><li>• Conduct a study</li></ul>	<ul style="list-style-type: none"><li>• Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy</li></ul>	<p>BIA and City of Hamilton</p>	<p>One year</p>



## **Marketing**

### **CONTEXT**

- Transition the BIA marketing and branding to coincide with new density investment and LRT.

### **STRATEGIES – in terms of time frame**

1. Hire a marketing director.
2. Update International Village brand (refresh brand) based on changing nature of the area including LRT, increased residential and neighbourhood shopping focus.
3. Update website to reflect changes.
4. Include LRT communications program and develop a communications protocol related to LRT updates and helping members stay informed.
5. Review events in light of LRT changes.
6. Use potential free Wi-Fi as a loyalty program and marketing outreach to visitors who use it
7. Ensure International Village has a new brand, image, events program for post LRT realities.
8. Physical branding elements such as the gateways need to be redeveloped for a post LRT streetscape.
9. The BIA can use the brand as part of their retail, commercial, and office attraction program.

### **RATIONALE**

- International Village BIA brand is better today known than in the past but still not well recognized.
- There is less emphasis on the international component and more emphasis on the local urban neighbourhood that is evolving in the area.
- Allows the BIA to have a clear message to members and other stakeholders on the changes occurring in the BIA, in the Downtown, and the LRT (allows International Village to evolve with changes to residential and LRT in order to stay relevant and fresh).

### **DESIRED IMPACT**

- One consistent, focused brand story that will allow for local and regional visitation, allow for the BIA to evolve post LRT, and continue to attract local entrepreneurs and outside investment.
- Build positive momentum stories and PR related to changes to counter negative perceptions around the loss of business, illegal activities, safety issues, etc.



## **BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS**





## 1.0 Introduction

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

The process included:

- Review of movement into and through the BIA
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review including visitor profiles
- 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. The suggestion action plan items included in this report are based on that workshop.

**International Village BIA**





## 2.0 Visitors to International Village BIA

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

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

## 2.1 Vehicular and Pedestrian Movement in International Village

### Vehicular and Pedestrian Volume 8-Hour Counts at Key Intersections in International Village

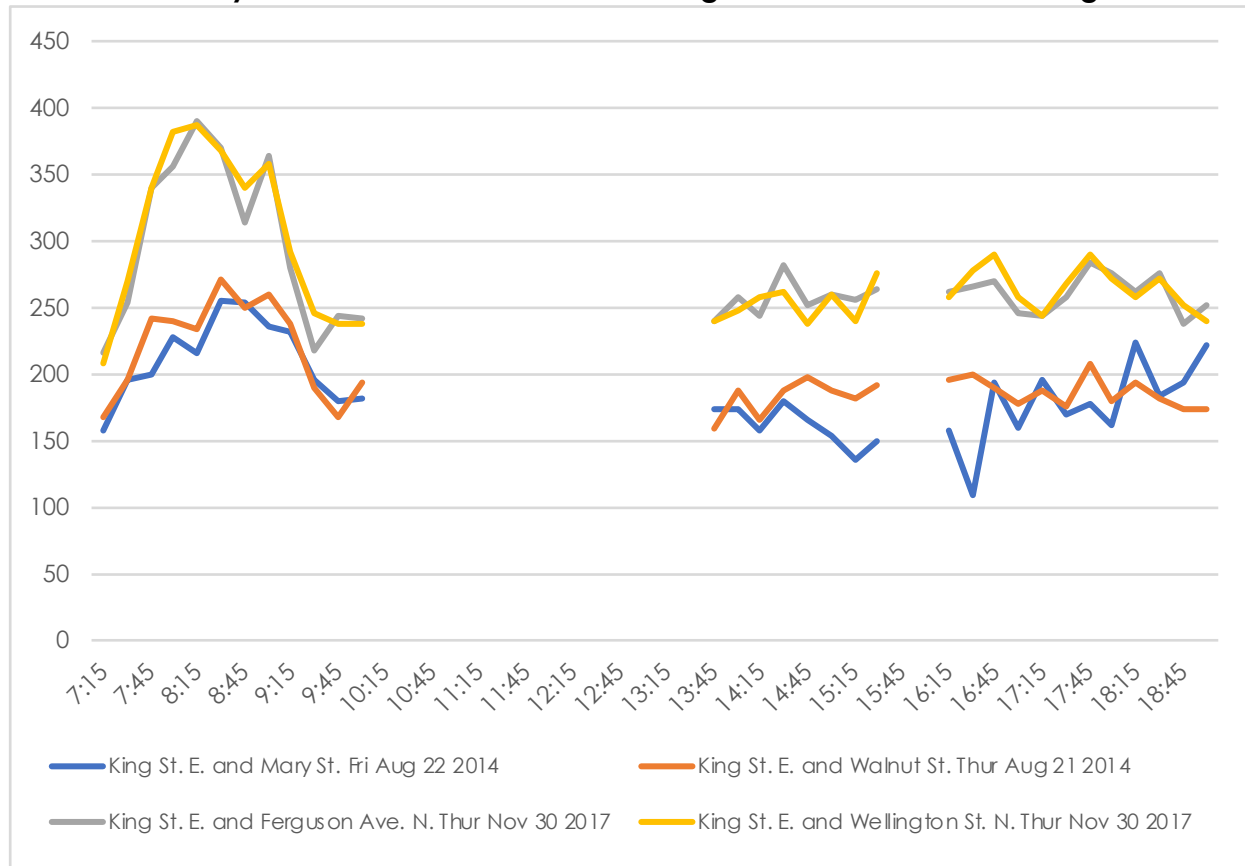
<u>Intersection</u>	<u>Date</u>	<u>8-hour Vehicular Count</u>	<u>8-Hour Pedestrian Count</u>
King St. E. and Mary St.	Fri. Aug. 22 2014	6,272	2,956
King St. E. and Walnut St.	Thur. Aug. 21 2014	6,816	1,672
King St. E. and Ferguson Ave. N.	Thur. Nov. 30 2017	9,147	2,243
King St. E. and Wellington St. N.	Thur. Nov. 30 2017	19,604	2,332
Main St. E. and Wellington St.	Thur. NOV. 30 2017	25,705	2,466

Source: City of Hamilton

Focusing on movement directly on King St. E. and Main St. E. the following graph illustrates vehicular traffic throughout the day.



### West Bound Only Vehicular Traffic Patterns on King St. E. in International Village BIA



Source: City of Hamilton

#### Findings for King St.

- There is a typical west bound spike in traffic moving toward the Downtown but it diverges after Ferguson Ave. to the nearby parking lots and other amenities.
- During the morning commute, approximately one-third of King St. E. and Wellington St. S. traffic diverts to Wellington St.
- Throughout the remainder of the day and in to the early evening, traffic is consistent with a few spikes at approximately 1,000 vehicles per hour travelling through the BIA.



### **Implications for International Village BIA**

- Early morning commuters travel through International Village to access the nearby parking lots as they commute into the Downtown. With LRT this traffic may have to find an alternative route to the parking lots.
- Businesses may be able to take advantage of the commuter traffic early in the morning.
- A consistent flow of traffic westbound exists throughout the day and into the early evening.



## 2.2 On-Street Parking

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

### On-Street Parking Meter Revenue

Year	Total On-Street Parking Revenue	Number on On-Street Parking Meters	Revenue Per Meter
2012	\$99,580.00	128	\$778
2013	\$105,337.69	138	\$763
2014	\$109,563.46	138	\$794
2015	\$114,120.86	138	\$827
2016	\$119,157.77	138	\$863

Source: City of Hamilton

Note that Parking rates increased in June 2017 from \$1.00 to \$1.50 per hour.

### Findings

- There is free parking Saturday and Sunday and every day in December.
- Parking revenue per meter can be used as a proxy for visitation. There has been an increase in visitation from 2012 to 2016.
- Parking is well used at 3.6 hours per day on average (excluding weekends and free December period).

### Implications for International Village BIA

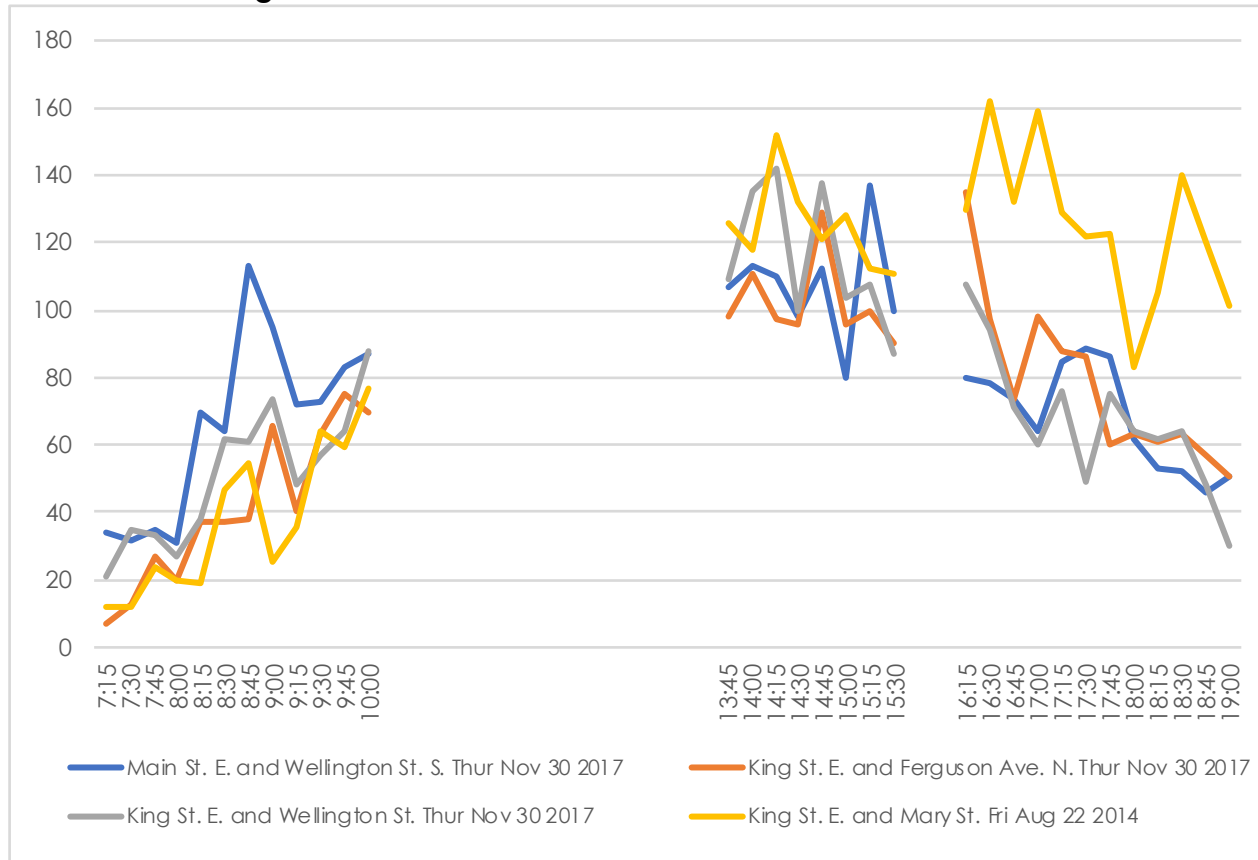
- International Village businesses rely on a combination of local residents and regional visitation.
- Changes that arise due to LRT will affect visitation.
- Regional visitors should be encouraged to use the long-term lots located behind the businesses.
- According to the City of Hamilton, mobile payment for parking and credit card payment at off-street lots should be able to be rolled out in 2018/2019. BIAs should look for and assist with increased education and marketing of these services in relation to their customers and visitation. Further advances include on-line payment for permit parking spaces.



## 2.3 Pedestrian Traffic

Average pedestrian traffic at the four major intersections in International Village. King St. E. and Mary St. is undercounted due to the nature of the T-shaped intersection and no data is available for the south side of King St. E.

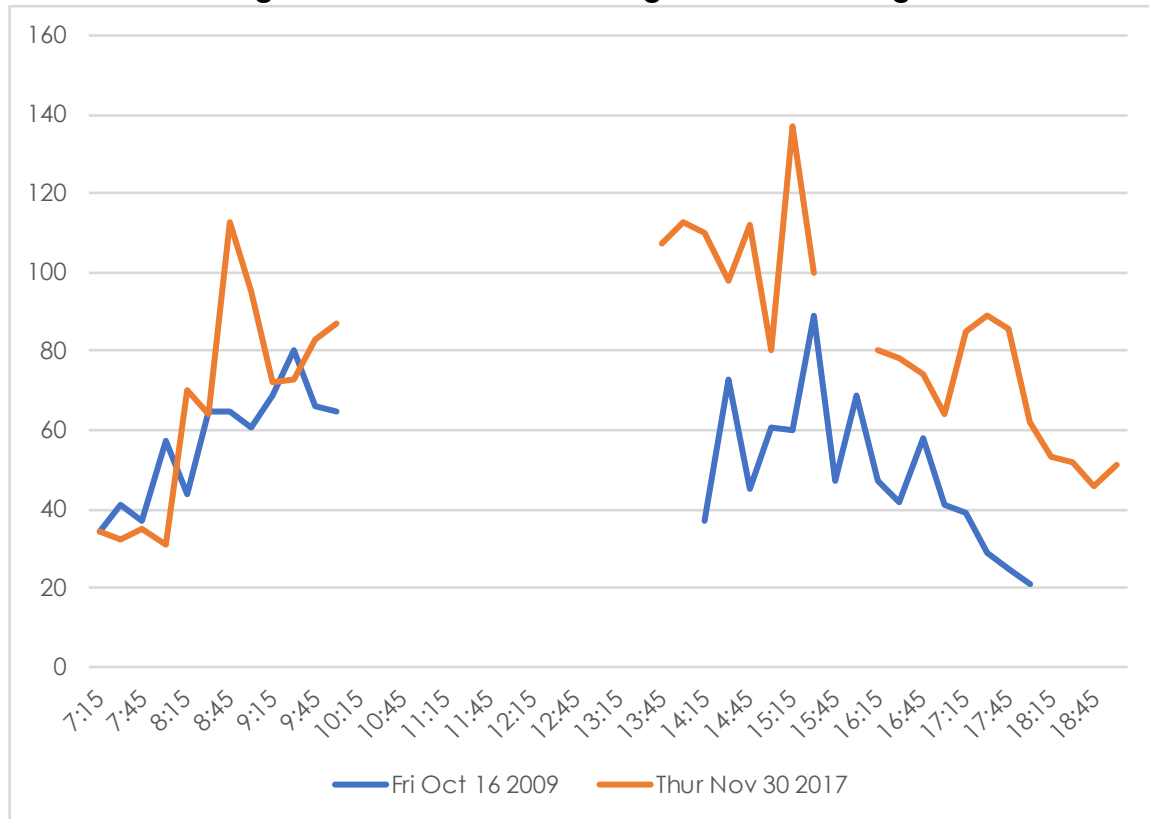
**International Village Pedestrian Counts – 15 Minute Intervals**



Source: City of Hamilton



### International Village Pedestrian Counts at King St. E. and Wellington St. N. 2009 to 2017 – 15 Minute Intervals



Source: City of Hamilton

#### Findings

- Pedestrian traffic builds throughout the day and generally falls off after 5:00 pm. Overall, pedestrian traffic is relatively good at over 400 people per hour during the afternoon.
- The exception is King St. E. and Mary St. which illustrates a strong early night time economy and pedestrian traffic as part of International Village BIA.



- There is a morning commute spike noticed at Main St. E. and Wellington St. for local area residents walking to work or transit stops.
- Comparing 2009 to 2017 pedestrian data illustrates an increase in pedestrian volume including spikes from local residents who are commuting and a higher early evening night time economy pedestrian traffic.
- According to Walk Score, the address 179 King St. E. has a Walk Score of 99 and a Transit Score of 86. International Village achieves a very high Walk Score because it is very accessible to a wide range of goods, services (grocery, libraries, work, theatre, cafes and restaurants, other shopping, parks, schools, etc.), and activities by foot. In addition, it is easy to access these places via transit.

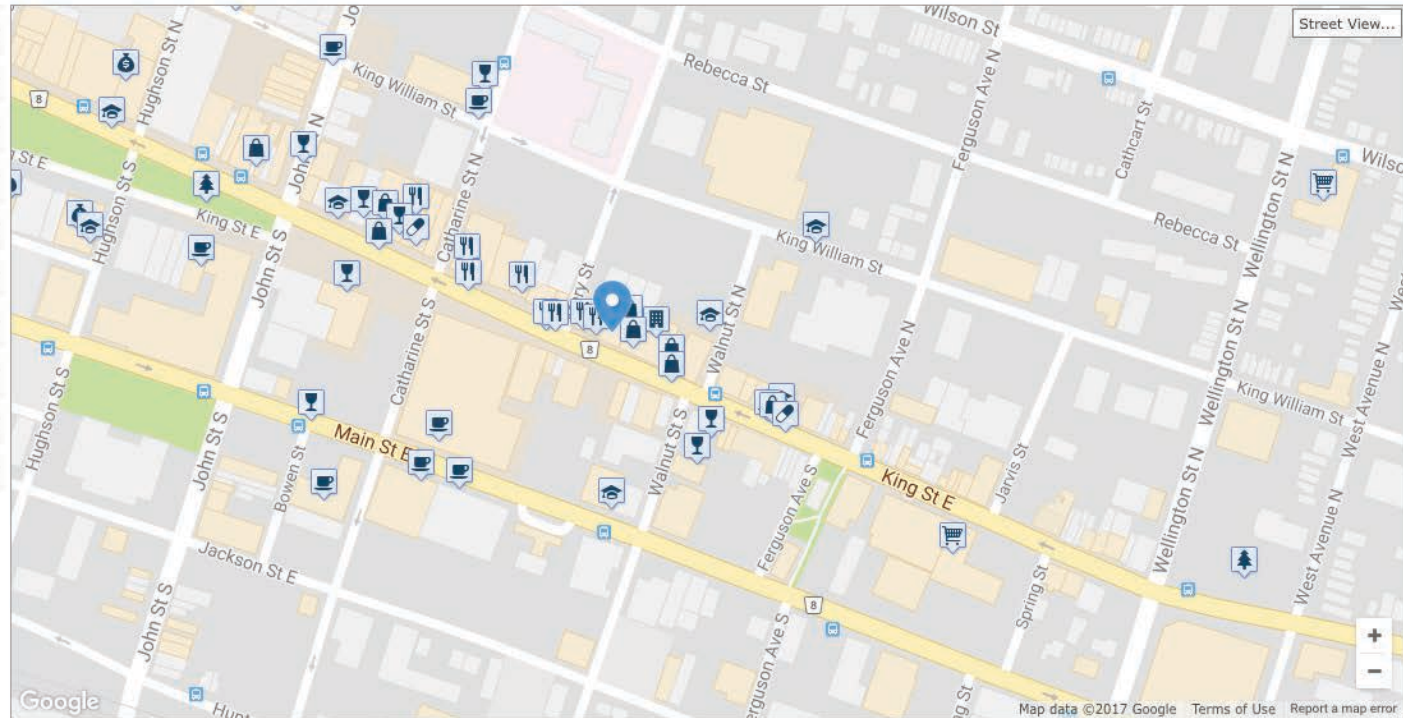




## International Village Walk Score – Nearby Amenities

### What's Nearby

<b>Restaurants:</b>	
Cafe Amor	.02km
<b>Coffee:</b>	
Coffee Culture Café & Eatery	.1km
<b>Bars:</b>	
Serve Ping Pong	.09km
<b>Groceries:</b>	
It's A Food Thing	.3km
<b>Parks:</b>	
Gore Park	.2km
<b>Schools:</b>	
Marvel Beauty Schools	.1km
<b>Shopping:</b>	
Little Italy's Fashion Outlet	.08km
<b>Entertainment:</b>	
Hoop Gallery	.1km
<b>Errands:</b>	
Power Drug Mart	.08km
<b>Search Nearby:</b>	



### Implications for International Village BIA

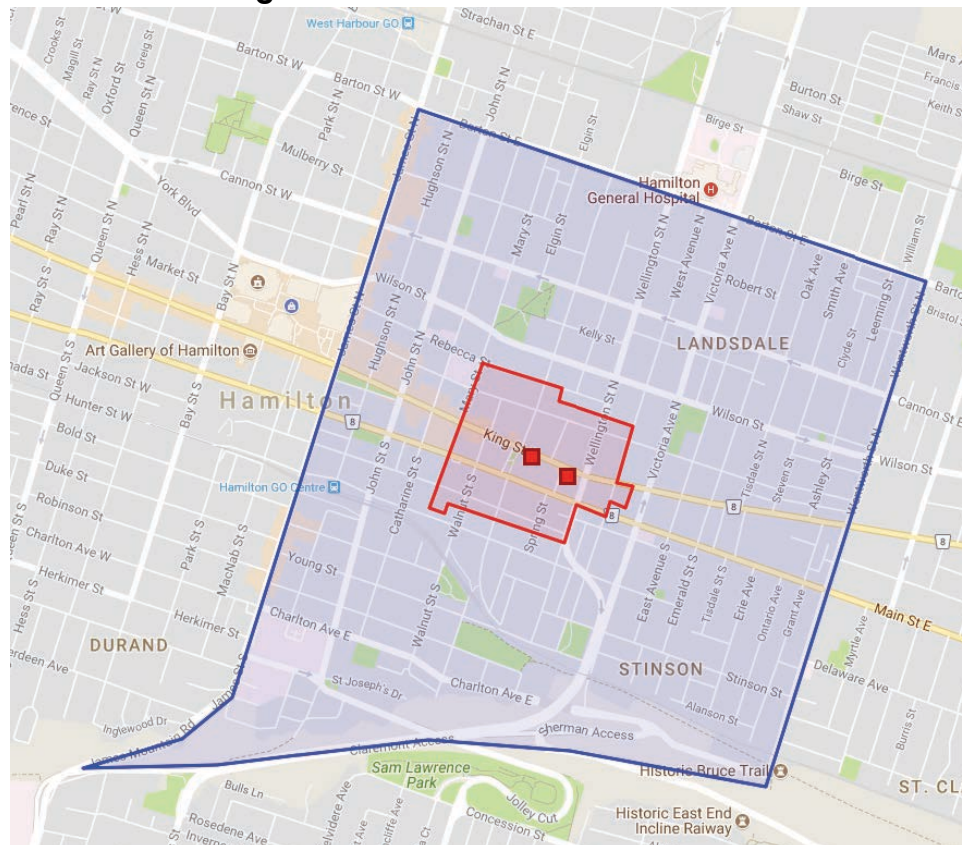
- Businesses need to adjust their hours of operation to reflect pedestrian spikes. This includes cafes opening during the early morning commute, taking advantage of the growing residential, how to adjust to LRT vehicular changes, and the growing night time economy.



### 3.0 Trade Area Analysis

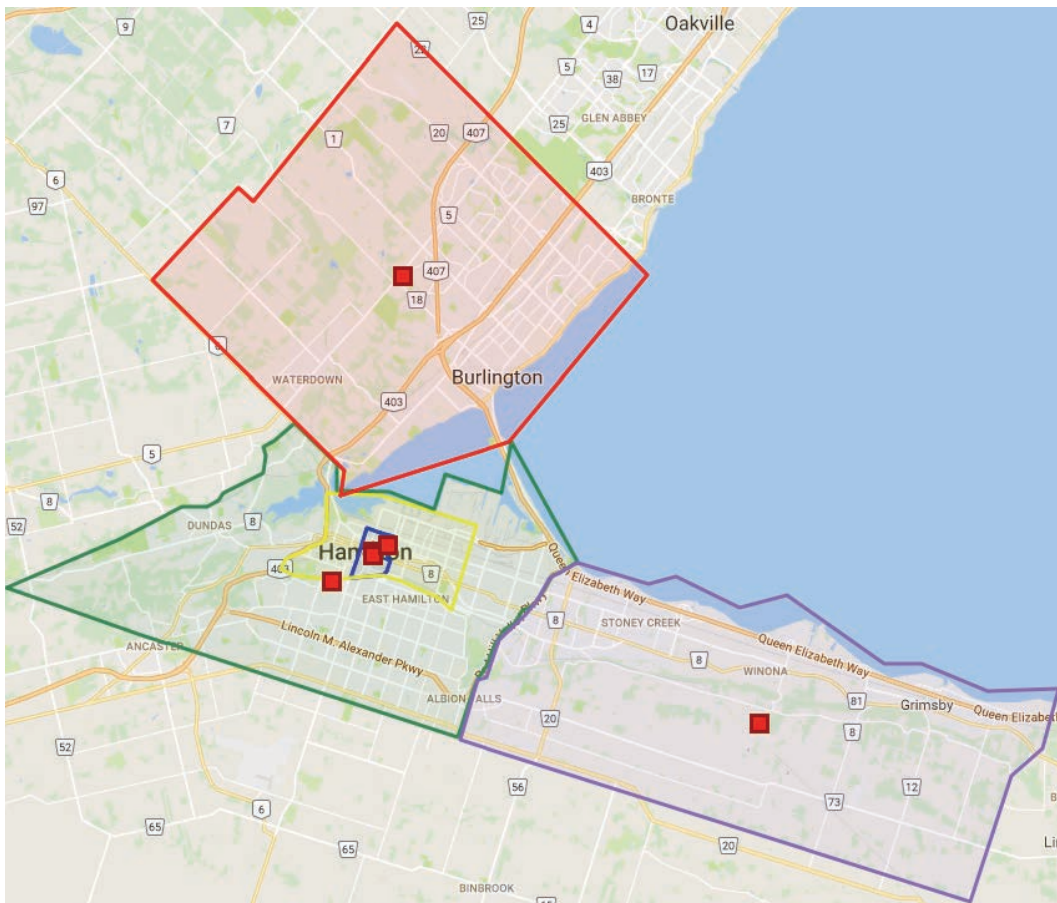
The trade areas for International Village BIA were established in the previous Commercial Market Assessment reports. They focused on the immediate area which was the built-up areas of Hamilton. The regional visitation was based on the surrounding urban and rural areas.

#### International Village BIA Trade Areas – Zoomed In





## International Village BIA Trade Areas – Zoomed Out





Trade areas include:

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

### Population, Households, and Daytime Workers

	Intern- ational Village BIA	Immed- iate Trade Area	West Lower City	Secon- dary Trade Area	Stoney Creek / East	Water- down / Burling- ton	City of Hamilton
2011 Population	1,278	23,263	91,430	349,699	127,622	193,432	519,950
2016 Population	1,821	24,920	97,416	361,349	136,998	220,832	566,276
Annualized Population Growth Rate	7.3%	1.4%	1.3%	0.7%	1.4%	2.7%	1.7%
2016 Households	1,070	13,115	45,946	152,942	52,305	83,004	229,822
Annualized Household Growth Rate	0.2%	0.4%	0.6%	0.8%	1.2%	1.4%	0.9%
Daytime Worker Population	6,693	25,535	84,495	156,281	59,051	111,633	228,040

Source: Statistics Canada 2011 and 2016

### Findings

- Within the BIA, there is a relatively high population and it has been growing since 2011.
- Within the Immediate Trade Area, there is a sizeable and growing population that supports local neighbourhood retail. However, the population has been transitioning away from older families to younger families.
- The future growth includes over 2,000 planned residential units plus an additional 2,000 in the future.
- There is a sizeable workforce of approximately 6,700 daytime workers in the BIA.
- Population growth in the Immediate Trade Area is faster than household growth suggesting that new families have established themselves in the area and are starting new families.
- The 400 m and 800 m (5 and 10-minute walk times) at the proposed LRT stops in International Village have a high population density that will only intensify through LRT adjacent land development.



### **Five and Ten Minute Walking Distance Population Near Proposed LRT Stations in International Village BIA**

	<b>King St. E. and Mary St.</b>	<b>King St. E. and Wellington St. N.</b>
400 m (5 Minute Walk Time)	2,876	4,971
800 m (10 Minute Walk Time)	14,909	14,450

Source: Statistics Canada 2016

#### **Findings**

- The local populations near the transit stops should be at least 6,000 to 7,000 within 400 m for local retail goods and services to be viable.
- Increased density near transit station is a must have condition for LRT to be successful and International Village to be a viable business district.





## Age Profile, Gender, and Ethnicity

	International Village BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
<b>Age Profile</b>							
0 to 9	9%	9%	10%	10%	11%	11%	10%
10 to 19	7%	7%	9%	11%	12%	12%	11%
20 to 29	21%	20%	18%	14%	12%	11%	14%
30 to 39	15%	16%	16%	13%	12%	13%	12%
40 to 49	12%	12%	12%	13%	13%	14%	15%
50 to 59	14%	15%	15%	16%	15%	15%	14%
60 to 69	12%	10%	11%	11%	13%	11%	10%
70+	9%	8%	9%	12%	12%	13%	12%
Median Age	37.9	37.2	38.6	41.6	42.5	42.7	41.6
<b>Gender</b>							
Male	48%	50%	50%	49%	49%	48%	49%
Female	52%	50%	50%	51%	51%	52%	51%
<b>Ethnicity</b>							
Visible Minority	46%	33%	24%	21%	16%	15%	19%
1st Generation Canadian	48%	36%	28%	27%	24%	26%	26%
2nd Generation Canadian	17%	23%	23%	25%	26%	25%	25%
3rd Generation Canadian +	35%	42%	50%	49%	50%	49%	49%

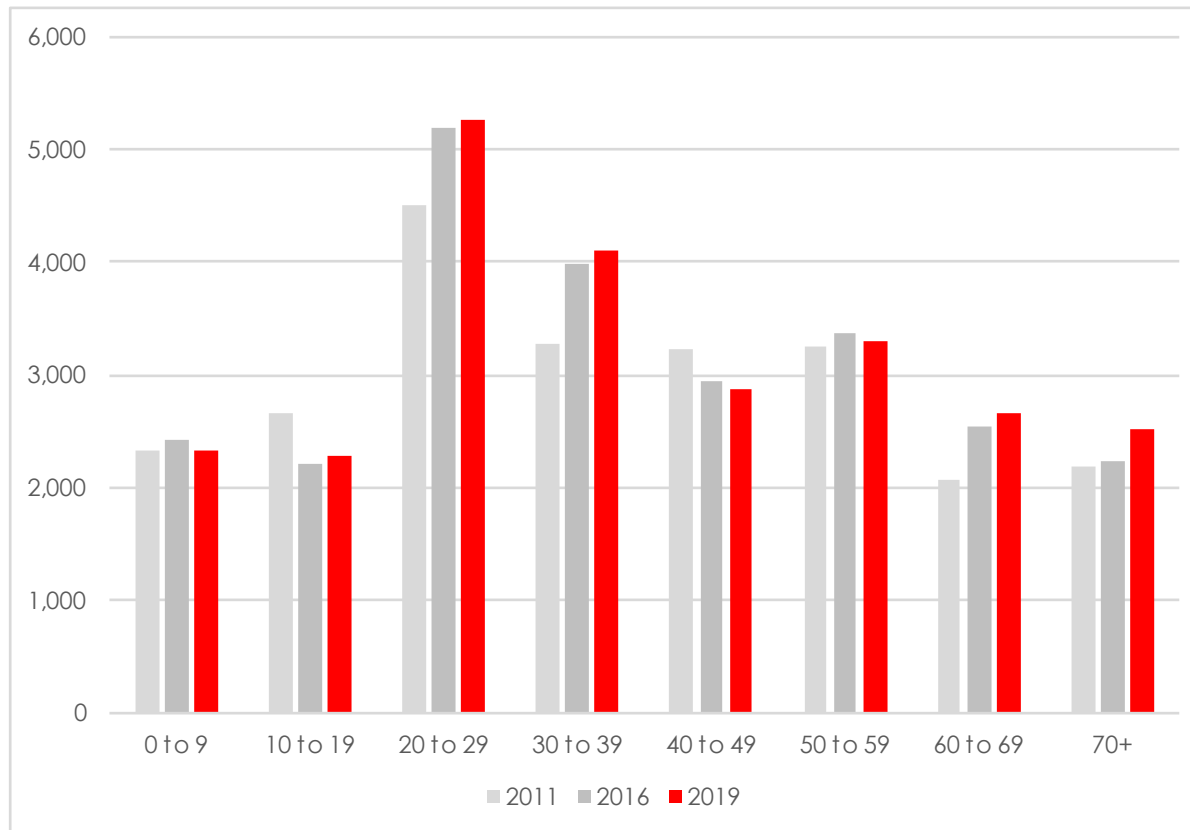
Source: Statistics Canada 2016

### Findings

- Within the BIA there is a high proportion of young adults and seniors.
- In the Immediate Trade Area, there is a high proportion of young adults. There is a sizeable proportion of children.
- The BIA has a higher proportion of females. This is largely due to the large seniors' complex at Wellington and King St. E. that tends to cater more to single female based senior resident.
- The Immediate Trade Area is becoming increasingly multicultural. The Immediate Trade Area has 33% of the residents as visible minorities. In addition, 36% of residents are first generation Canadians.



## Immediate Trade Area Age Profile Changes 2011 to 2019



Source: Statistics Canada 2011, 2016 and estimates from Environics 2019

### Findings:

- The largest growth is in the 20 to 39 year range as more young adults move into the Immediate Trade Area and begin their career and family formation period.
- There is continued growth in the seniors population attributed to aging baby boomers as well as the availability of seniors housing nearby.
- There is a noticeable growth in young children as the young families age in place in the Downtown area.



## Household Size and Marital Status

	International Village BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Household Size							
1 Person	59%	50%	46%	32%	23%	24%	28%
2 Person	25%	29%	29%	32%	33%	34%	32%
3 Person	8%	10%	12%	15%	17%	17%	16%
4 + Person	8%	11%	13%	21%	27%	26%	24%
Person Per Household	1.7	1.9	2.0	2.4	2.6	2.6	2.5
Marital Status							
Single	43%	41%	38%	31%	25%	24%	29%
Married, Common Law	33%	38%	42%	51%	60%	61%	55%
Separated, Divorced, Widowed	24%	21%	20%	18%	15%	15%	16%

Source: Statistics Canada 2016

### Findings

- There is a high proportion of single person households in International Village and in the Immediate Trade Area. Again, this is in part due to the number of senior households in the nearby homes and apartment buildings as well as the high proportion of young adults.
- The average person per household is a low 1.7 to 1.9.
- There are a higher proportion of singles as well as residents who are separated, divorced, or widowed.





## Education, Occupation, and Home Ownership

	International Village BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
<b>Education</b>							
Less than High School	26%	25%	24%	21%	20%	12%	20%
High School Graduate	31%	29%	27%	28%	29%	26%	28%
College, Diploma	23%	26%	26%	28%	31%	29%	30%
University Graduate	20%	20%	23%	23%	20%	33%	22%
<b>Occupation</b>							
Management	16%	18%	19%	22%	26%	32%	24%
Science	8%	5%	5%	5%	5%	8%	6%
Health	7%	8%	8%	8%	7%	6%	8%
Govt, Ed., Social Services	8%	9%	12%	12%	11%	13%	12%
Arts, Culture, Recreation	4%	4%	4%	3%	2%	3%	3%
Sales and Service	34%	29%	26%	25%	23%	23%	24%
Other	16%	23%	23%	21%	25%	13%	23%
Labour Force Participation	48%	59%	61%	62%	64%	69%	64%
<b>Housing Tenure</b>							
Own	9%	24%	37%	62%	75%	77%	68%
Rent	91%	76%	63%	38%	25%	23%	32%

Source: Statistics Canada 2016

### Findings

- Residents within the Immediate Trade Area are relatively well educated. There is a good cross representation of professional occupations including private sector management, business administration, science, health, education, and government.
- There is a higher proportion of workers whose occupations are sales and service, hospitality, and those in transportation, trades, utilities, manufacturing, etc. There is a high proportion who work in sales and service type occupations.
- There is relatively low labour force participation as there is a very high proportion of retirees and residents who are not in the workforce including students.



- The number of households who own their home is relatively low but it has been increasing over time.

### Travel to Work

	International Village BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Travel to Work							
Vehicle - Driver or Passenger	26%	45%	62%	79%	91%	87%	83%
Public Transit	43%	33%	22%	14%	5%	9%	10%
Walk	28%	19%	13%	6%	3%	3%	5%
Bike	0%	1%	3%	1%	0%	1%	1%
Other	2%	2%	1%	1%	1%	1%	1%

Source: Statistics Canada, Environics Estimates 2017

### Findings

- Approximately 45% of residents in the Immediate Trade Area use a vehicle to get to work. Public transit and walking are relied upon for residents to conduct their daily lives. As noted, in the pedestrian counts, in 2017 there is a noticeable spike in morning walking commute and public transit within International Village BIA. 19% of Immediate Trade Area residents walk to work as they value living close to their work in the Downtown area.



## Household Income

	International Village BIA	Immediate Trade Area	West Lower City	Secondary Trade Area	Stoney Creek / East	Waterdown / Burlington	City of Hamilton
Household Income < \$20,000	45%	29%	24%	13%	11%	5%	9%
\$20,000 to \$39,999	26%	28%	25%	20%	15%	12%	17%
\$40,000 to \$59,999	13%	18%	18%	17%	16%	12%	16%
\$60,000 to \$79,999	8%	11%	12%	13%	14%	12%	13%
\$80,000 to \$99,999	4%	6%	8%	14%	12%	12%	11%
\$100,000 to \$149,999	3%	6%	9%	15%	21%	21%	18%
\$150,000 to \$200,000	1%	2%	3%	7%	10%	12%	8%
\$200,000 +	0%	1%	2%	5%	6%	13%	6%
Average Household Income	\$35,324	\$45,039	\$55,273	\$79,754	\$93,780	\$119,917	\$88,151
Real Annualized Growth in Household Income	1.7%	1.0%	0.9%	0.8%	0.8%	0.7%	1.0%

Source: Statistics Canada 2016

### Findings

- Average household income is below \$50,000 in the Immediate Trade Area. However, 9% earn more than \$100,000.
- Within the BIA, the average household income is low considering the high proportion of residents on fixed incomes associated with senior living.
- There has been very positive movement in real household incomes in the Immediate Trade Area (excluding inflation adjustments) suggesting positive changes in the local neighbourhoods. Areas such as Corktown and Stinson illustrate a higher rate of gentrification compared to the neighbourhoods of Beasley and Landsdale.



### 3.1 New Residential Developments

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

#### Recently Completed Housing Units

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



### Pre-Construction and Under Construction Housing Units

<b>Development</b>	<b>Address</b>	<b>Number of Units</b>	<b>Status</b>
15 Queen	15 Queen St. S.	176	TBD
101 Locke	101 Locke	80	2017
Van Kleef	467 Charlton St.	162	2017
Theatre Lofts	193 King St. E.	11	2017
220 Cannon	220 Cannon St.	100	2017
Royal Connaught	112 King St. E.	700	2017
Essex	366 Bay St. N.	6	2017
Templar Flats	33 King William	25	2017
220 Dundurn	220 Dundurn St. S.	194	2017
William Thomas	46-52 James St. N.	146	2017
Tivoli	108 James St. N	106	2018
Connolly	98 James St. S.	259	TBD
Acclamation Lofts	179 James St. N.	71	2018
Pasadena	27 Bold St.	32	2018
20 George	20 George St.	230	2018
Gibson School Lofts	601 Barton St. E.	80	TBD
<b>Total Under Construction</b>		<b>2,378</b>	



## Proposed Housing Units

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

Note:

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

### Findings New Residential Development

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



### 3.2 Household Expenditure

#### Household Expenditure

	Intern- ational Village BIA	Immed- iate Trade Area	West Lower City	Sec- ondary Trade Area	Stoney Creek / East	Water- down / Burlington	City of Hamilton
<b>Local Serving Retail</b>							
Food Purchased from Stores	\$3,257	\$4,570	\$5,325	\$7,449	\$8,685	\$9,311	\$8,024
Alcohol Purchased from Stores	\$563	\$856	\$1,106	\$1,463	\$1,582	\$1,944	\$1,546
Health Care Related Retail	\$1,051	\$1,415	\$1,634	\$2,214	\$2,534	\$2,839	\$2,364
<b>Food Services</b>							
Restaurant dinners	\$910	\$1,130	\$1,352	\$1,820	\$1,992	\$2,502	\$1,949
Restaurant lunches	\$422	\$482	\$549	\$748	\$850	\$1,040	\$806
Restaurant breakfasts	\$154	\$198	\$222	\$274	\$298	\$354	\$288
Restaurant snacks and beverages	\$303	\$360	\$428	\$517	\$547	\$640	\$538
Alcohol Serviced on Premises	\$340	\$375	\$425	\$489	\$665	\$489	\$511
<b>Retail Merchandise</b>							
Women's Clothing and Accessories	\$753	\$1,082	\$1,246	\$1,848	\$2,079	\$2,656	\$2,006
Men's Clothing and Accessories	\$460	\$596	\$692	\$991	\$1,113	\$1,375	\$1,077
Children's Clothing and Accessories	\$23	\$48	\$53	\$57	\$67	\$67	\$62
Clothing as Gifts	\$26	\$49	\$55	\$74	\$82	\$96	\$79
Home Furnishings	\$553	\$760	\$841	\$1,196	\$1,353	\$1,860	\$1,331
Appliances and Electronics	\$448	\$557	\$620	\$830	\$930	\$1,172	\$907
Leisure Retail (Sporting, Books, Music)	\$323	\$466	\$580	\$819	\$1,163	\$915	\$886
Pet Supplies	\$171	\$350	\$464	\$629	\$744	\$865	\$694
Florist, Nursery, Greenhouse Stock	\$97	\$190	\$251	\$405	\$569	\$487	\$445
Home Improvement Retail	\$42	\$99	\$666	\$342	\$468	\$524	\$404
<b>Services</b>							
Packaged Travel	\$98	\$185	\$310	\$679	\$865	\$1,186	\$797
Clothing – Laund., Dry Cleaning, Tailor	\$112	\$131	\$115	\$114	\$113	\$159	\$119
Recreation Memberships	\$109	\$173	\$247	\$434	\$478	\$478	\$797
Movies	\$66	\$75	\$77	\$90	\$108	\$86	\$92



Live Sporting Events	\$26	\$27	\$36	\$62	\$80	\$110	\$71
Live Performing Arts	\$56	\$53	\$70	\$119	\$144	\$202	\$132
Personal Care Services	\$311	\$460	\$576	\$896	\$1,043	\$1,359	\$983

Source: Statistics Canada, Environics Estimates 2019





## **Findings**

Households in the Immediate Trade Area spend a higher proportion of their budget on (14 top ranked goods and services):

- Dry cleaning
- Movies
- Children's clothing and accessories
- Alcohol served on premises
- Breakfast
- Snacks and beverages
- Clothing as gifts
- Appliances and electronics
- Health relate retail
- Lunch
- Dinner
- Food from stores
- Alcohol purchased from stores
- Men's clothing and accessories
- Women's clothing and accessories

## **Implications for International Village BIA**

- Senior based retail including health related goods, eating out, and gifts
- Young professionals who work hard and eat out a lot and spend money on leisure retail, home entertainment, movies, etc.
- New families moving in to the area and purchasing children's clothing and accessories



### 3.3 Other Major Target Markets and Customer Visitation

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

- Office workers including the police station, Goodwill, Hamilton Tiger Cats, etc.
- Downtown hotels and accommodation (note that the Days Inn hotel on Main St. E. will be closing to be converted to seniors housing)
- Theatre Aquarius Performing Arts Centre

#### Key Findings

- Employment as measured within the International Village BIA boundary includes a mix of retail-oriented employment and office, institutional, and entertainment/recreation employment. There were 2,310 employees in 2016.
- Overall, employment had decreased from 2012 to 2014. Since 2014 it has rebounded to 2,300 range.
- According to Statistics Canada and Environics estimates, there are approximately 6,050 workers in the International Village BIA area. Within the International Village Primary Trade Area there are 25,566 workers (Source: Statistics Canada, Environics Estimates).
- Retail based employment has shifted upwards and downwards from 2012 to 2016. In 2016, it had been increasing.
- Office employment has been increasing. Institutional and entertainment employment have been falling.

#### International Village BIA Employment

Employment Sector	2012	2013	2014	2015	2016
Office	712	720	753	899	960
Institutional (government, non-profits, etc.)	1,350	1,321	856	842	795
Shopping, Services, Repairs, Servicing and Rentals	448	449	394	395	425
Entertainment and Recreation	191	190	116	167	75
Other	42	45	34	47	55
<b>Total</b>	<b>2,743</b>	<b>2,725</b>	<b>2,153</b>	<b>2,350</b>	<b>2,310</b>

Source: 2017-11-25 data extracted from HAMCIPA\_2021EMP Database

A link to the City of Hamilton's employment survey for 2018 is provided for more details.

<https://www.hamilton.ca/mapping-business-reporting/activity-reports/citys-annual-employment-survey>



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

### **Implications for International Village BIA**

- The recent retail employment growth is a good sign of the health, vitality, and viability of retail businesses in International Village BIA. Increasing employment may be associated with increasing sales (caution as employment does not differentiate between part-time and full-time employment).
- There are 20,000 to 25,000 workers in the Downtown and in close proximity to International Village BIA. Based on food expenditure per worker of \$1,800 annually, this equates to a conservative estimate of \$36 million in food service sales potential. International Village BIA could capture 20% of this potential which would translate to \$7.2 million in food service sales for businesses in International Village.
- Nearby, there is a significant population base of over 17,000 workers that includes retail employment, manufacturing, and transport/trades.

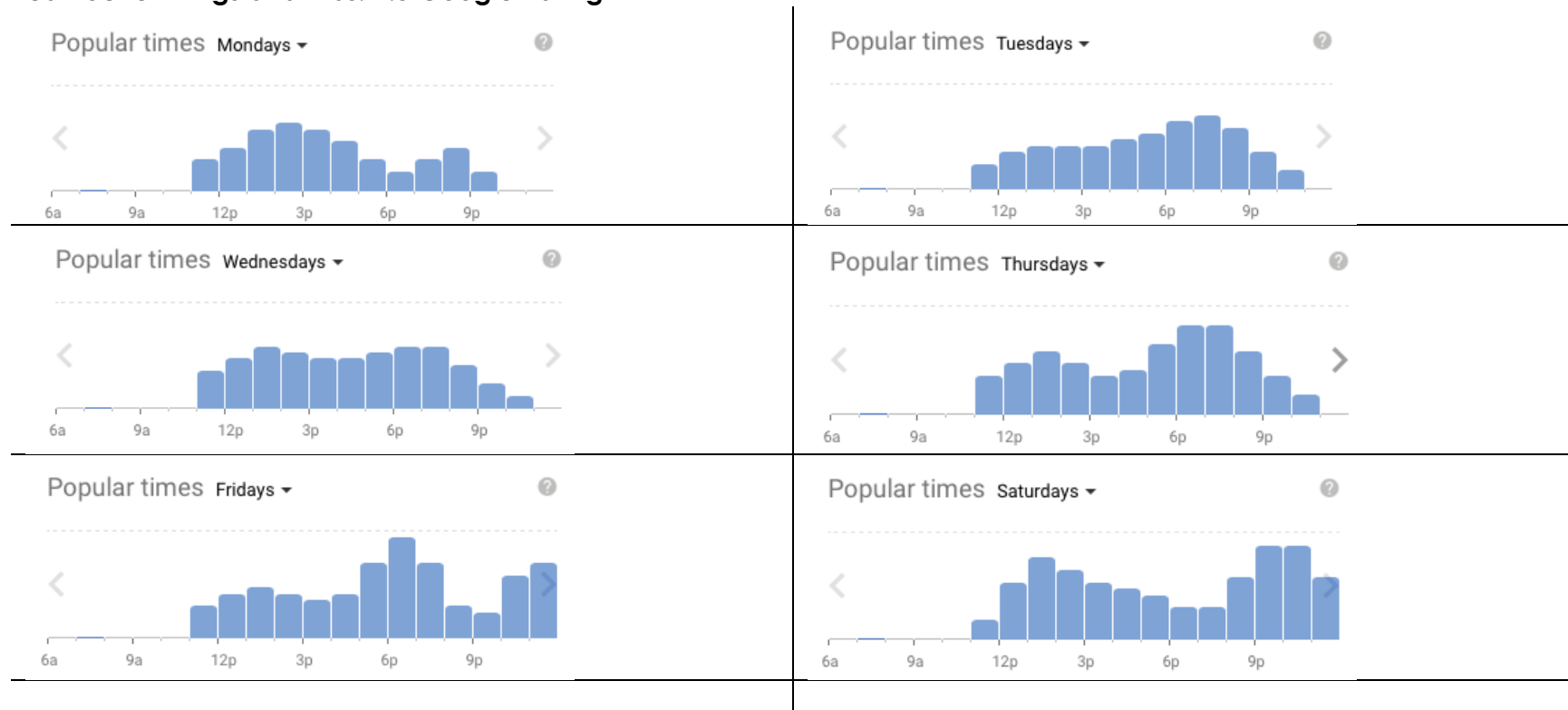


### 3.4 Customer Visitation Data

#### Customer Flow Times

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

#### Red Rocket Wings and Ribs: 4.3 Google Rating



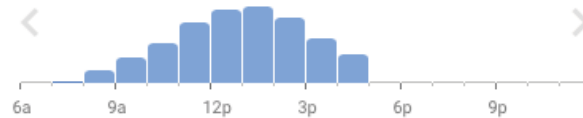


## Café Oranje: 4.6 Google Rating

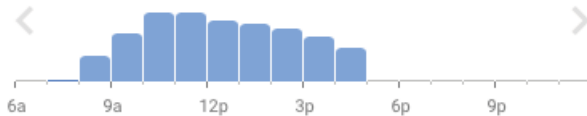
Popular times Mondays ?



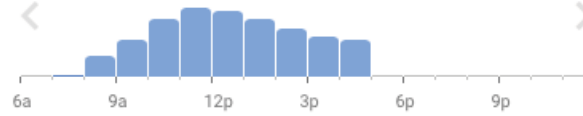
Popular times Tuesdays ?



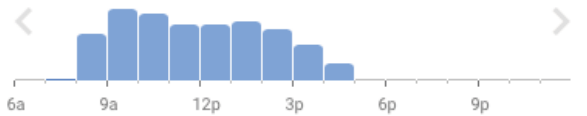
Popular times Wednesdays ?



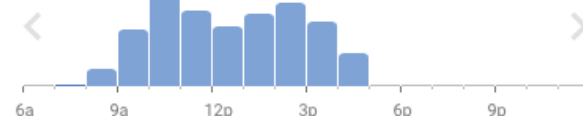
Popular times Thursdays ?



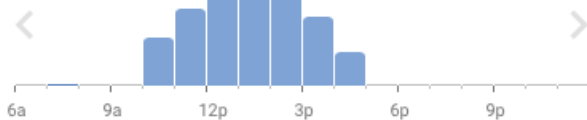
Popular times Fridays ?



Popular times Saturdays ?

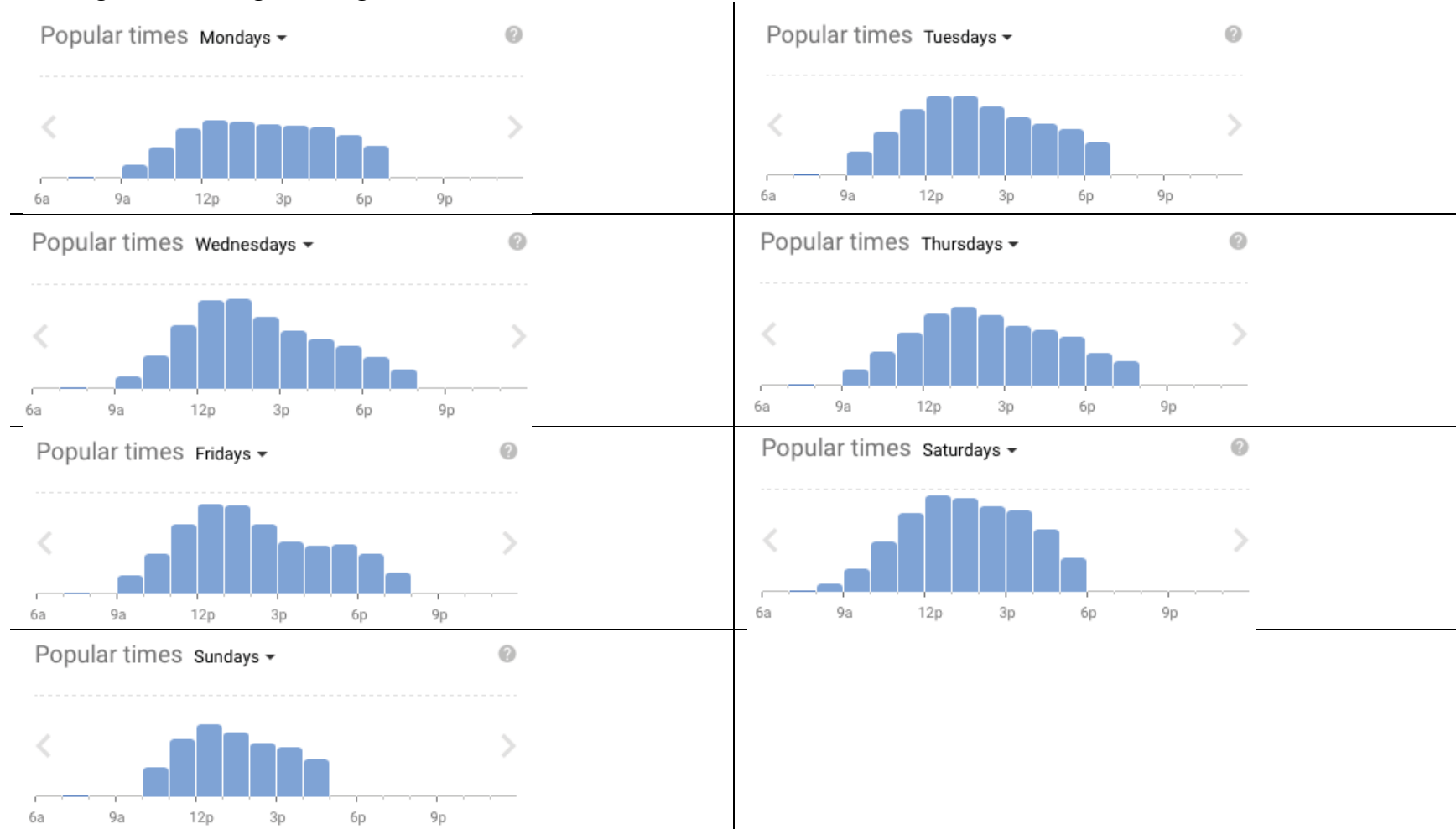


Popular times Sundays ?





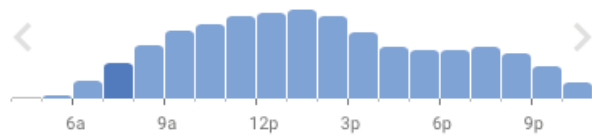
## Denningers: 4.6 Google Rating





### Tim Horton's: 3.4 Google Rating

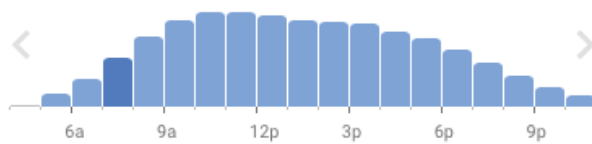
Popular times Mondays ▾



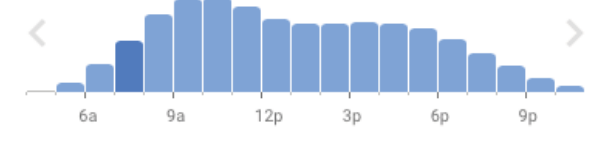
Popular times Tuesdays ▾



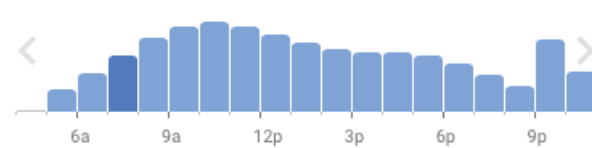
Popular times Wednesdays ▾



Popular times Thursdays ▾



Popular times Fridays ▾



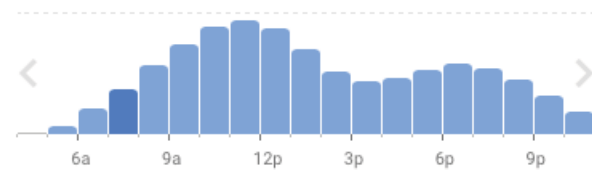
Popular times Saturdays ▾



**LIVE** Not too busy



Popular times Sundays ▾





## Black Forest Inn: 4.4 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



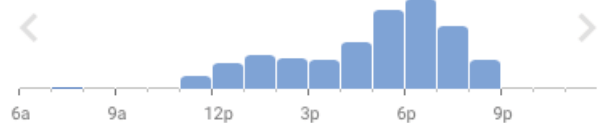
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾

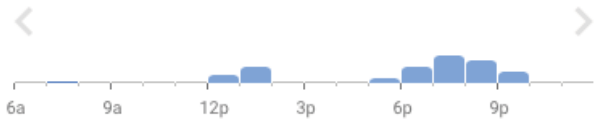




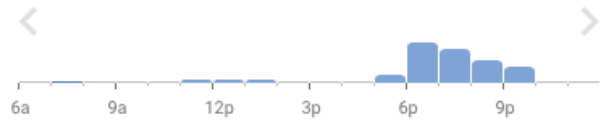


## Shakespeare's: 4.5 Google Rating

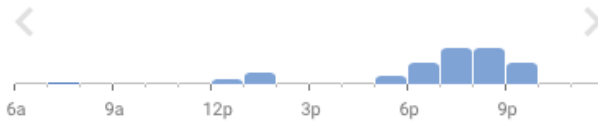
Popular times Mondays ?



Popular times Tuesdays ?



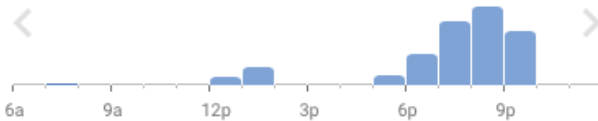
Popular times Wednesdays ?



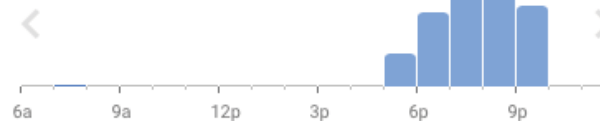
Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



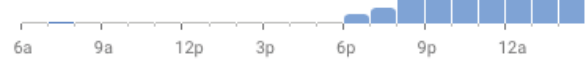


### TJ King Karaoke: 3.6 Google Rating

Popular times **Wednesdays** ▼



Popular times **Saturdays** ▼



Popular times **Fridays** ▼



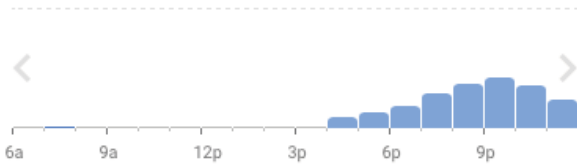
Popular times **Sundays** ▼



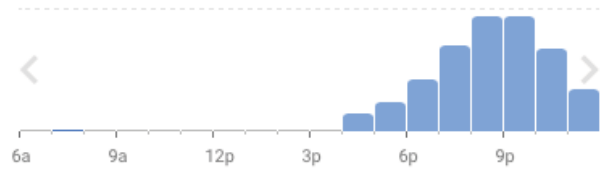


## Gameopolis: 4.5 Google Rating

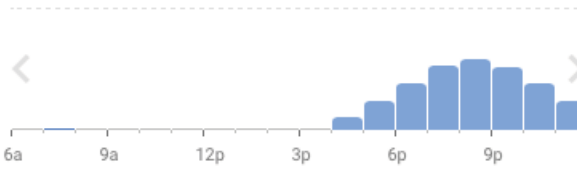
Popular times Mondays ?



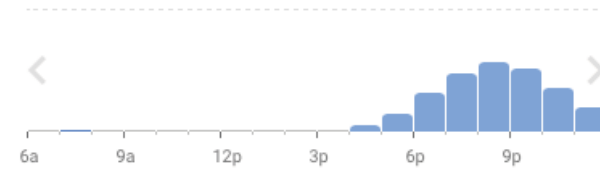
Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



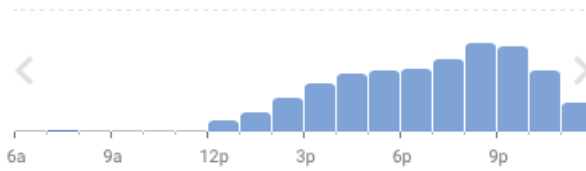
Popular times Fridays ?



Popular times Saturdays ?



Popular times Sundays ?





## Fizz Soda and Sandwiches: 4.7 Google Rating

Popular times Mondays ?



Popular times Tuesdays ?



Popular times Wednesdays ?



Popular times Thursdays ?



Popular times Fridays ?





## Hoolycrab: 4.0 Google Rating

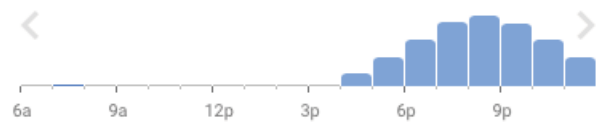
Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



Popular times Fridays ▾



Popular times Saturdays ▾

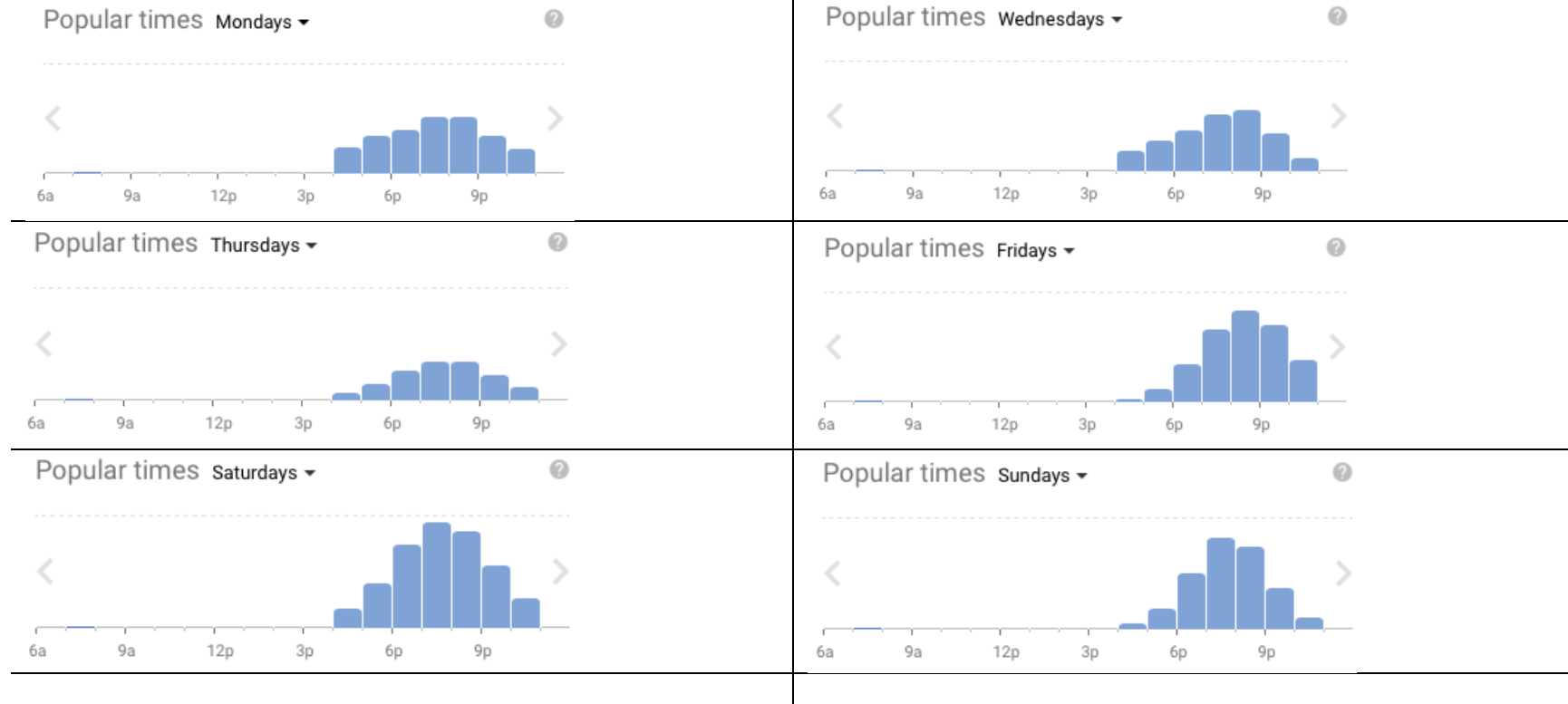


Popular times Sundays ▾





## Liu Liu Hot Spot: 4.1 Google Rating



### Findings

- The highest traffic to the eating establishments primarily occurs in the evening. Many eating establishments rely upon this single time frame to draw visitors including Liu Liu Hotpot. Others are evening oriented but only on weekends such as Shakespeare's and Black Forest Inn. Others such as Hoolycrab draw primarily on evenings but are able to sustain some lunch time draw.
- There are several late-night venues such as Gameopolis and TJ Karaoke that are busier on weekends.
- Fizz Soda and Sandwiches and Red Rocket Wings and Ribs are able to draw multiple times throughout the day and evening.



- Tim Horton's is primarily an early morning location due to the one-way commuter traffic on Main St. E. but is busy throughout the day.
- Finally, Denningers and Café Oranje cater primarily to the lunch and early afternoon traffic.
- Many of the eating establishments need to be drawing more extended visitation beyond their single focused time period.



## 4.0 International Village Website Audit

### Background and Methodology

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

The five areas assessed were:

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

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

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

### Nature of Findings

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





### Detailed Findings

International Village BIA is in the process of updating their website. The following analysis was based on the existing one but should be read in the context that the site is being updated.

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

### Rating of Key Areas of BIA Website

Area Reviewed	International Village BIA
Functionality	Good
Content & Purpose	Good
Innovation and Interactivity	Good
Visual Design	Basic
Mobile Optimized	Basic Visible but not optimized
Accessibility Compliance	29/159

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

**Content Provided in BIA Websites**

Content Provided	International Village BIA
Gallery	√
Testimonials	√
Member portal/login	

**AODA Compliance**

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

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

### Findings International Village BIA Website

- The website has good content with a lot of visuals that are available through its Photo and Visual gallery. While the information is accessible, the design follows an older format (5+ years old), which does not allow for a full use of the real-estate on the page. A re-design will make the information easier to navigate and more legible. Furthermore, mobile optimization will be key given that 86% of Canadian households have mobile devices (CRTC) and a vast majority use it to conduct research into information online. The website does well in providing Business members with information on business events such as the Chamber of Commerce Seminar and procedural information. The target of the website is a mix of businesses, visitors, investors and potential partners.

### International Village BIA Website Conclusion

As stated the BIA website is being updated.

Areas where other BIA websites excel are with: good visual presence online with some providing excellent cohesive/marketing imagery (e.g. Live, Learn, Play) and content. Some of the sites also have unique features which can help to differentiate the retail/shopping area/food/restaurants/things-to-do for visitors and potentially pique the interest of investors/other businesses for its unique nature (e.g. map of wall murals in the area).





## 5.0 Quality of Life Statistics –Housing Prices

### 5.1 Housing Prices

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

#### **Hamilton Centre Average House Price**

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

*Source: Realtors' Association of Hamilton and Burlington*



## 6.0 Commercial Audit and Rent Review

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

### International Village BIA Commercial Business Audit – 2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>				
Clothing and Accessories	10	6.6%	13,500	3.8%
Furniture and Home Furnishings	2	1.3%	6,000	1.7%
Electronics and Appliance Stores	2	1.3%	3,300	0.9%
Building Supply and Garden Equipment	1	0.7%	2,000	0.6%
General Merchandise	2	1.3%	12,600	3.5%
Sporting Goods, Hobby, Book, Music	4	2.6%	4,400	1.2%
Used Merchandise	4	2.6%	9,500	2.7%
Other Retail	7	4.6%	9,400	2.6%
<b>Total Retail</b>	<b>32</b>	<b>21.1%</b>	<b>60,700</b>	<b>17.1%</b>
<b>Food/Drug Retail</b>				
Food and Beverage Stores	4	2.6%	11,400	3.2%
Health and Personal Care Stores	4	2.6%	8,000	2.3%
<b>Total Food/Drug Retail</b>	<b>8</b>	<b>5.3%</b>	<b>19,400</b>	<b>5.5%</b>
<b>Food Services</b>	<b>21</b>	<b>13.8%</b>	<b>43,500</b>	<b>12.2%</b>
<b>Services</b>				
Personal Services	7	4.6%	11,500	3.2%
Personal Services - Beauty	12	7.9%	15,250	4.3%
Financial Services	1	0.7%	1,000	0.3%
Medical Services	4	2.6%	17,200	4.8%
Professional Services	30	19.7%	87,850	24.7%
Recreation Services	5	3.3%	13,000	3.7%
Other Services	10	6.6%	22,100	6.2%



<b>Total Services</b>	<b>69</b>	<b>45.4%</b>	<b>167,900</b>	<b>47.3%</b>
<b>Total Occupied</b>	<b>130</b>	<b>85.5%</b>	<b>291,500</b>	<b>82.0%</b>
<b>Vacant Retail</b>	<b>18</b>	<b>11.8%</b>	<b>34,700</b>	<b>9.8%</b>
<b>Vacant Office</b>	<b>4</b>	<b>2.6%</b>	<b>29,100</b>	<b>8.2%</b>
<b>Total</b>	<b>152</b>	<b>100.0%</b>	<b>355,300</b>	<b>100.0%</b>

Source: 360 Collective



## International Village BIA Commercial Business Audit

	2017			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>				
Clothing and Accessories	10	6.6%	13,500	3.8%
Furniture and Home Furnishings	2	1.3%	6,000	1.7%
Electronics and Appliance Stores	2	1.3%	3,300	0.9%
Building Supply and Garden Equipment	1	0.7%	2,000	0.6%
General Merchandise	2	1.3%	12,600	3.5%
Sporting Goods, Hobby, Book, Music	4	2.6%	4,400	1.2%
Used Merchandise	4	2.6%	9,500	2.7%
Other Retail	7	4.6%	9,400	2.6%
<b>Total Retail</b>	<b>32</b>	<b>21.1%</b>	<b>60,700</b>	<b>17.1%</b>
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Financial Services	1	0.7%	1,000	0.3%
Medical Services	4	2.6%	17,200	4.8%
Professional Services	30	19.7%	87,850	24.7%
Recreation Services	5	3.3%	13,000	3.7%
Other Services	10	6.6%	22,100	6.2%
<b>Total Services</b>	<b>69</b>	<b>45.4%</b>	<b>167,900</b>	<b>47.3%</b>
<b>Total Occupied</b>	<b>130</b>	<b>85.5%</b>	<b>291,500</b>	<b>82.0%</b>
<b>Vacant Retail</b>	<b>18</b>	<b>11.8%</b>	<b>34,700</b>	<b>9.8%</b>
<b>Vacant Office</b>	<b>4</b>	<b>2.6%</b>	<b>29,100</b>	<b>8.2%</b>

	2010			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total
	7	4.9%	10,000	3.2%
	4	2.8%	7,400	2.3%
	3	2.1%	5,300	1.7%
	0	0.0%	0	0.0%
	1	0.7%	5,000	1.6%
	7	4.9%	8,400	2.7%
	3	2.1%	5,100	1.6%
	0	0.0%	0	0.0%
	<b>25</b>	<b>17.4%</b>	<b>41,200</b>	<b>13.0%</b>
	1	0.7%	11,400	3.6%
	6	4.2%	12,300	3.9%
	<b>7</b>	<b>4.9%</b>	<b>23,700</b>	<b>7.5%</b>
	<b>27</b>	<b>18.8%</b>	<b>54,100</b>	<b>17.1%</b>
	9	6.3%	11,450	3.6%
	8	5.6%	8,500	2.7%
	3	2.1%	7,200	2.3%
	4	2.8%	17,200	5.4%
	30	20.8%	87,850	27.7%
	1	0.7%	2,000	0.6%
	6	4.2%	20,000	6.3%
	<b>61</b>	<b>42.4%</b>	<b>154,200</b>	<b>48.7%</b>
	<b>120</b>	<b>83.3%</b>	<b>273,200</b>	<b>86.2%</b>
	<b>22</b>	<b>15.3%</b>	<b>30,600</b>	<b>9.7%</b>
	<b>2</b>	<b>1.4%</b>	<b>13,000</b>	<b>4.1%</b>



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<b>Total</b>	<b>152</b>	<b>100.0%</b>	<b>355,300</b>	<b>100.0%</b>	<b>144</b>	<b>100.0%</b>	<b>316,800</b>	<b>100.0%</b>
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### **Findings International Village BIA Commercial Business Audit**

There is approximately 355,000 sq. ft. of commercial businesses in International Village BIA which is a medium to large sized commercial main street.

- There are 152 different businesses. The average size of each business is 2,338 sq. ft. There are primarily small retailers on King St. E. but larger retailers on the periphery of the BIA including offices.
- Services is the largest category. Services account for 47% of the total square footage. This includes both professional services, medical services, automotive, recreational, and personal services.
- Retail merchandise accounts for 17% of the total square footage. There are more clothing and accessories stores as well as general merchandise and used merchandise. This is significant given the competitive nature of the retail industry and online retailing. It is not common for a main street to increase its retail merchandise at this time.
- Food and drug retail accounts for 5.5% of the total square footage. This includes Denningers. However, overall there is a lack of specialty food and local serving goods and services.
- Food services is still a very large category. 12% is a good range for food services for a main street shopping district.
- Vacancy for retail space is less than ten percent of the total square footage.
- Vacancies tend to be concentrated in a few buildings that are problematic to lease.

#### Changes since 2010

- Since 2010, more retail space has been added.
- There is approximately 40,000 more sq. ft. of retail commercial space in International Village
- The percentage breakdown in services has remained relatively the same.
- Retail Merchandise has increased in line with growth in the clothing and accessories, general merchandise, and used merchandise. There are fewer leisure type retailers.
- Food and Beverage retailers has decreased.
- Food Services has witnessed the highest decline. The BIA was known for a large collection of food services. This is still true but there are fewer restaurants.
- Vacant retail has remained approximately the same. However, as stated, the vacancies tend to be concentrated in a few buildings.



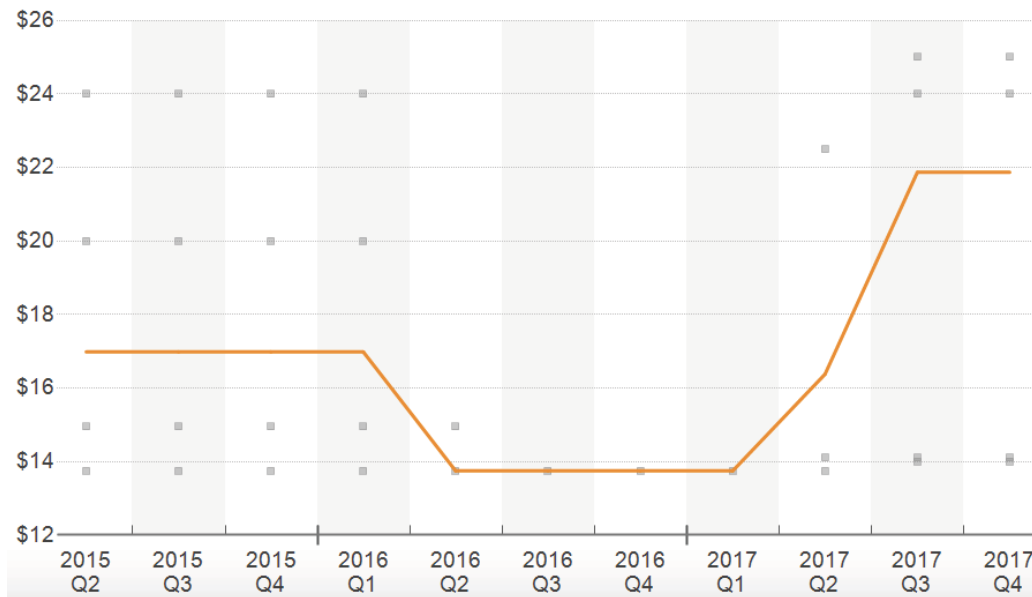


## 6.1 Rent and Land Value Analysis

### Net Rent Analysis

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

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



### Findings International Village BIA Rents

- Retail rents vary from \$14/sq. ft. to \$25/sq. ft.
- Rents have been trending upwards.

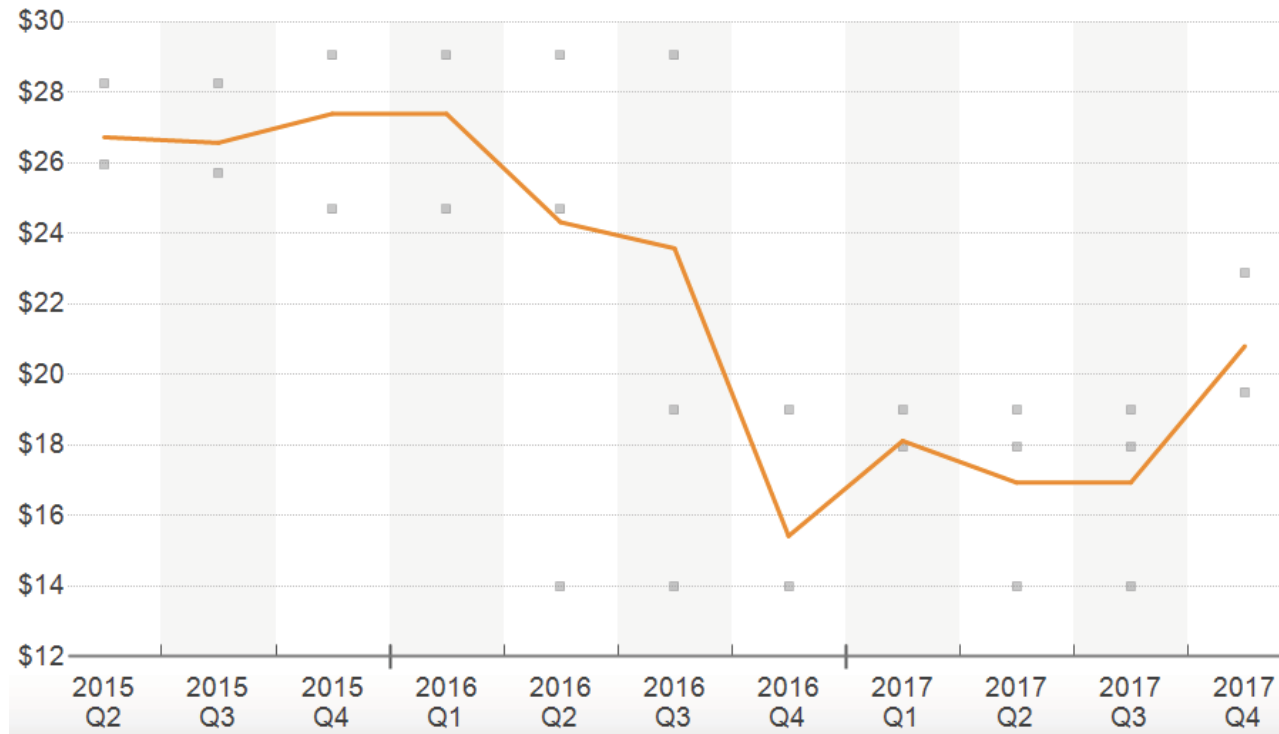
Source: CoStar (each series of horizontal data points represents the net asking rent for one property)



## Office Gross Rents

Office gross rents are based on smaller units.

### Office Gross Rental Rate



### Findings International Village Office Gross Rents

- Gross rents vary from \$14/sq. ft. to \$29/sq. ft.
- Large units such as the former Goodwill site on King William lease for \$10/sq. ft. (gross).

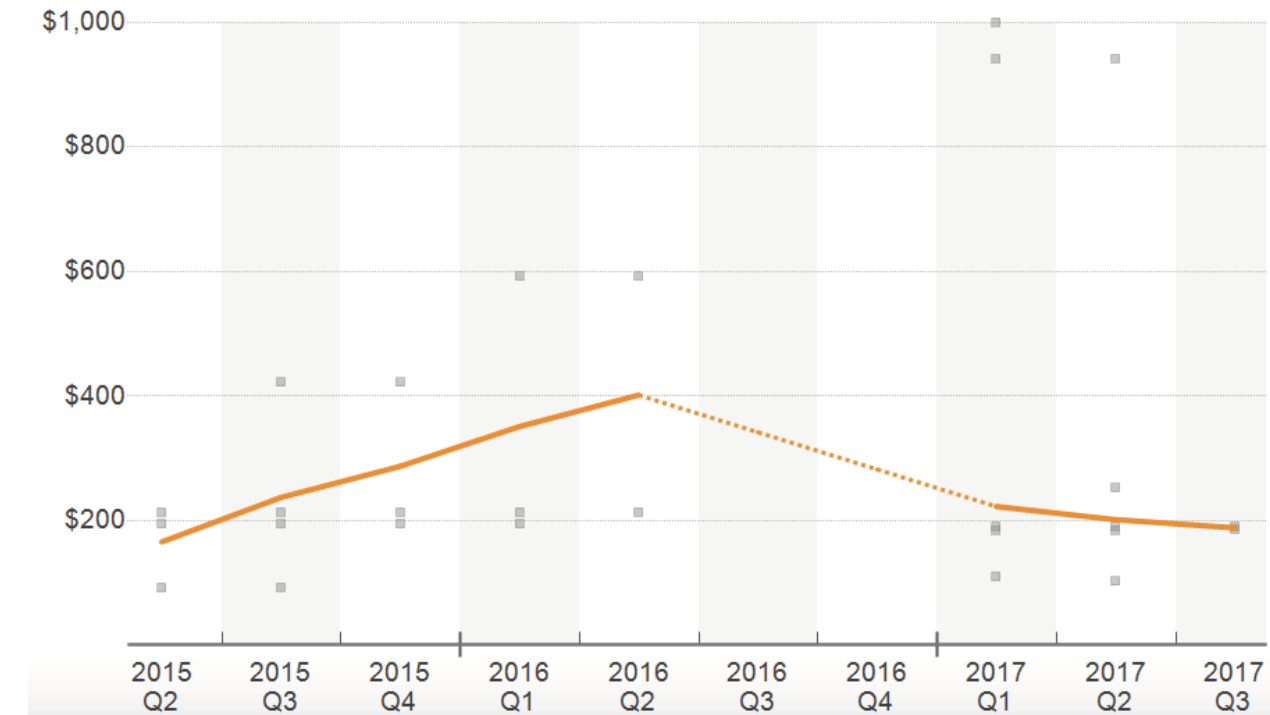
Source: CoStar



### Average Asking Price/Sq. Ft.

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

### Average Asking Price/Sq. Ft.



Source: CoStar

### Findings International Village BIA Asking Price

- The average price of properties including retail component varies from a low \$150/sq. ft. to over \$1000/sq. ft.
- The average price of property has been trending upward but the majority of properties are in the \$200/sq. ft. range.



## 7.0 Investment in International Village BIA

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

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

### Past and Current Development Applications

There are several active development applications for places within International Village BIA.

#### Development Applications 2012 to 2017

Address	Committee of Adjustment or Zoning Code	Reference Number	Details
193 King St. E.	HM/A	15	131
213 King St. E.	MDA	17	88 Recognize existing patio
210 Main St. E.	DA	17	49 Construct 15 Storey with 224 units
154 Main St. E.	ZAR	17	74 Construct 25 Storey with 267 units
143 Main St. E.	SPA	17	44 Demolish and build 6 Storey mixed use with 4 units
212 King William St.	DA	17	53 Construct 6 Storey mixed use with 108 units
206 King St. E.	ZAC	17	46 Construct 15 Storey mixed use with 120 units

Source: City of Hamilton Planning and Economic Development Department

#### Legend

SPA: Site Plan Approval

DA, MDA: Development Application (modified)

HM/A, HM/B: Committee of Adjustment

ZAR: Zoning ByLaw Amendment Application

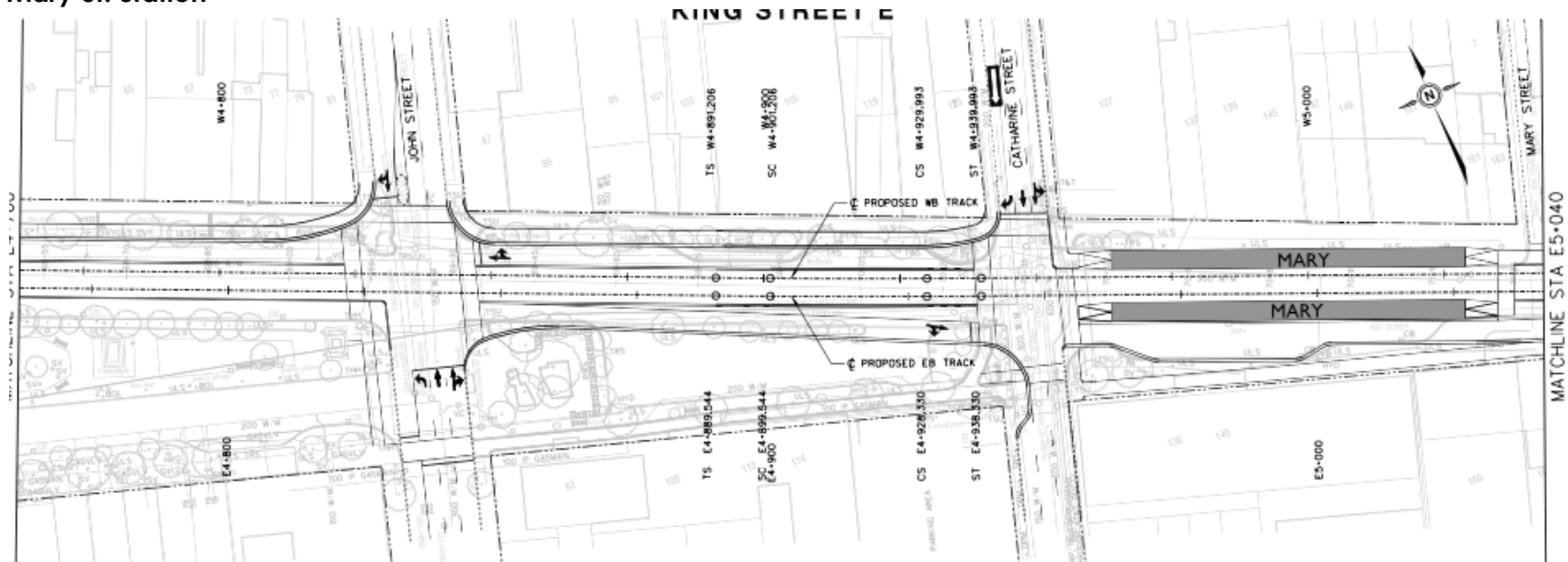
ZAC: Zoning Application



## Proposed LRT Stations

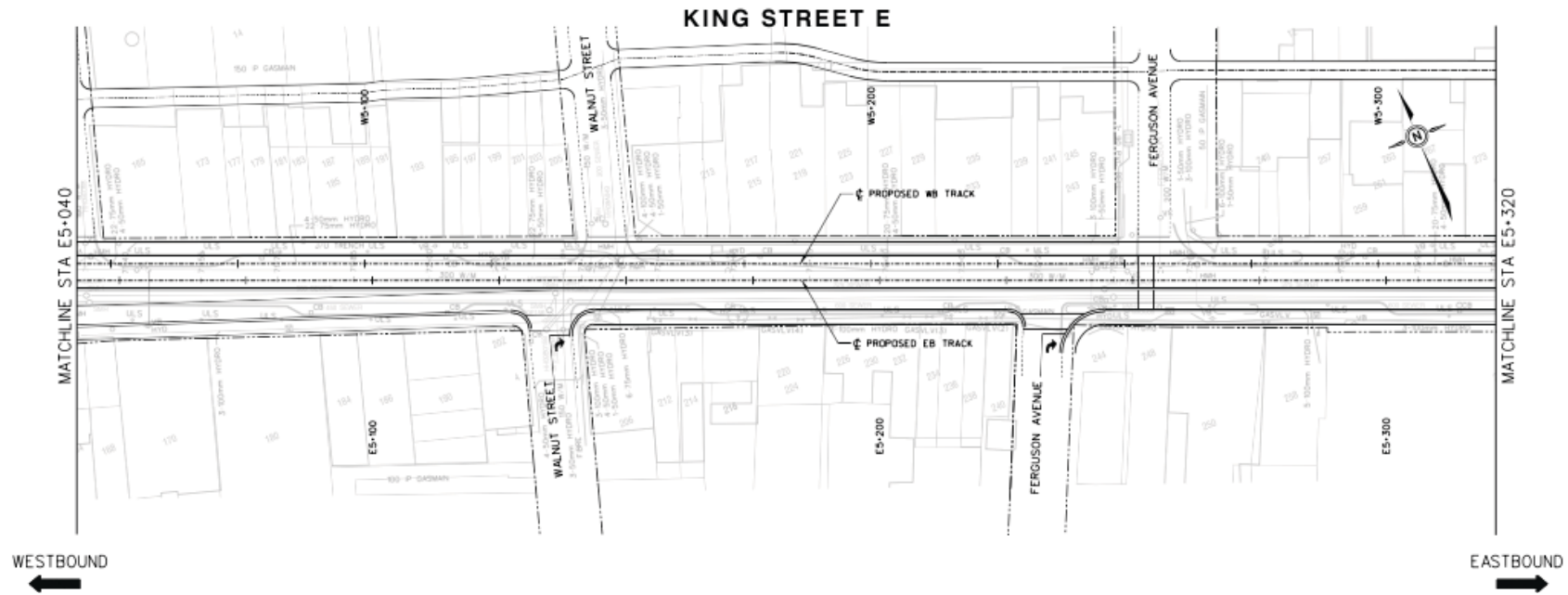
- There is one station in International Village. However, Mary St. Station transitions between the two.
- The proposed stations and road alignment as of January 2018 is the following:

## Mary St. Station



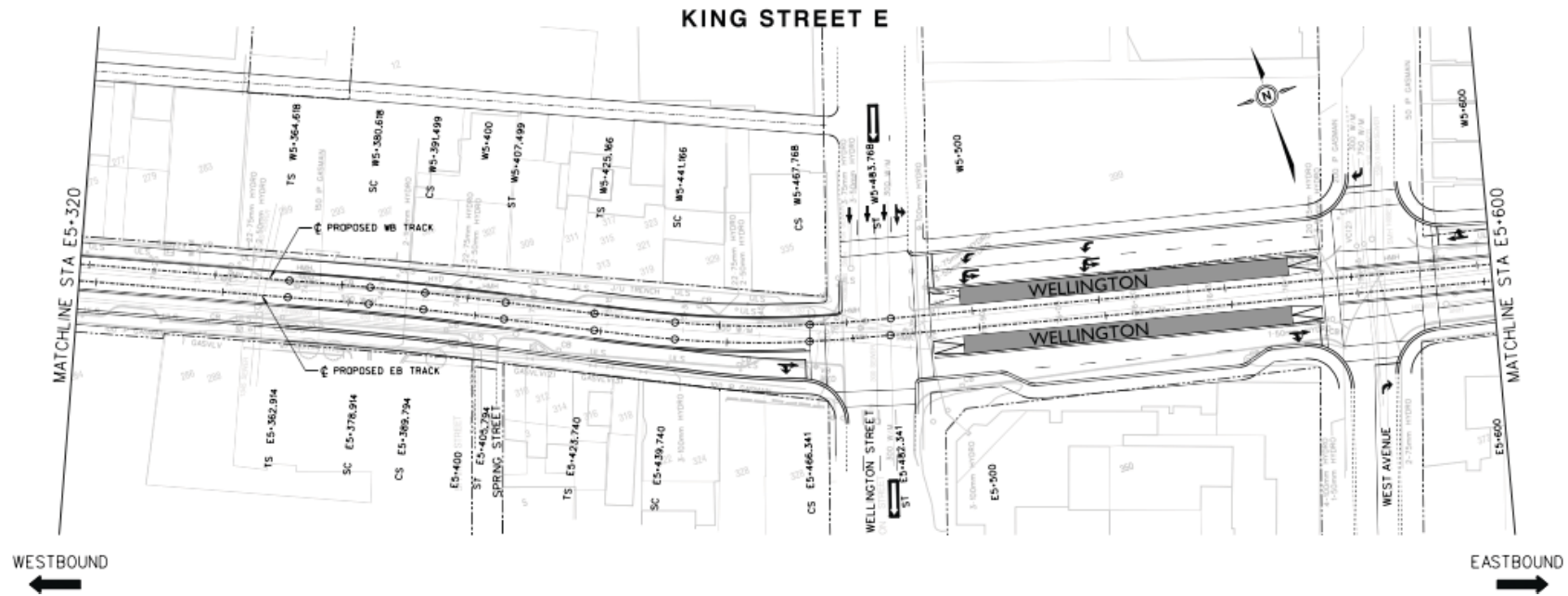


# King St. E. and Ferguson





# Wellington St. Station





## Commercial Building Permits

### International Village BIA Value of Commercial Building Permits

Year	Commercial	Industrial	Total
2012	\$481,000	\$0	\$481,000
2013	\$2,737,595	\$0	\$2,737,595
2014	\$417,000	\$0	\$417,000
2015	\$754,350	\$0	\$754,350
2016	\$411,000	\$0	\$411,000
<b>Total</b>	<b>\$4,800,945</b>	<b>\$0</b>	<b>\$4,800,945</b>

Source: AMANDA Building Permits extracted by GIS-Planning&Analysis where folder no has a Commercial (C3, C9) or Industrial (I3,I9) component

#### Notes:

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

#### Findings

- Approximately \$5 million has been invested in commercial properties in International Village BIA in the period from 2012 to 2016.
- The investment includes smaller redevelopments as well as larger scaled building renovations.
- LRT plans will be tied to continued commercial and residential development in International Village.





## Grants and Incentives

### International Village BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG
2012	\$123,766.64
2013	\$265,368.95
2014	\$312,720.66
2015	\$0
2016	\$17,653.27
<b>Total</b>	<b>\$719,509.52</b>

Source: City of Hamilton

#### Findings

- Investment in International Village BIA commercial businesses has been significant through the use of City incentives. Over \$700,000 in value has been invested through the use of the various programs available to businesses.
- From 2012 to 2014, the investments were large. However, investments through incentives in 2015 and 2016 are lower in value.

## Assessed Value

### International Village BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2012	\$37,176,240	
2013	\$39,305,520	5.7%
2014	\$40,993,414	4.3%
2015	\$43,337,581	5.7%
2016	\$45,176,130	4.2%
2017	\$51,542,773	14.1%

Source: MPAC, City of Hamilton

#### Findings

- From 2012 to 2017, the assessed value of the commercial areas within the International Village BIA



has increased by over \$14 million. This represents an annualized rate of 5.6%.

- The assessed values have increased at a very healthy rate of 4% to 5% from 2012 to 2016. In 2017, there was a significant increase in assessed values of 14.1%. This is partly reflective of the data collection of MPAC related to how they assess properties based on a four-year time period.

### **Implications for International Village BIA**

- The level of investment in International Village 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.



## International Village BIA Budget

The International Village levy portion of the budget stayed constant from 2012 to 2016. There was a modest increase in 2017. The parking revenue sharing has declined as a smaller amount was shared amongst more BIAs. In 2017, there was a modest increase. The result is that the total budget has remained constant.

## International Village BIA Budget

	<b>Christmas Grant</b>	<b>City Contribution</b>	<b>Parking Revenue Sharing</b>	<b>Total Grants</b>	<b>Levy</b>	<b>BIA Budget</b>
2012	n/a	\$8,000.40	\$17,982.55	\$25,982.95	\$140,000	\$165,982.95
2013	n/a	\$7,622.65	\$16,827.57	\$24,450.22	\$140,000	\$164,450.22
2014	n/a	\$7,409.42	\$17,783.69	\$25,193.11	\$140,000	\$165,193.11
2015	n/a	\$7,858.10	\$13,890.53	\$21,748.63	\$140,000	\$161,748.63
2016	n/a	\$7,452.03	\$11,786.51	\$19,238.54	\$140,000	\$159,238.54
2017	n/a	\$7,176.61	\$12,872.70	\$20,049.31	\$145,000	\$165,049.31

Source: City of Hamilton



## 8.0 Key Person Interviews

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

### STRENGTHS

- Good relations with community members
- Increased number of business openings
- Good direction and positive ideas coming from the BIA
- Good development pressure to redevelop lots and intensify post LRT
- See investment from outside of Hamilton in the local area – wants to know if it is substantive enough or just anecdotal
- Increasingly multicultural
- Beautiful area with character

### WEAKNESSES

- Some City frustration with loops to jump
- Safety and security issues still exist in the Downtown – real and perceived

### OPPORTUNITIES

- Realize that businesses have to do more to communicate with visitors and customers as they lead up to LRT construction – vitally important to have a very good database
- Opportunities for increased business and BIA linkages
- Increased partnership and cooperative marketing campaigns
- International Village could be a destination
- Change in the name to Village could be worth pursuing
- Increased beautification

The following report was completed by Page by Page Consulting in early 2017 and includes a summary of key person interviews with businesses (non-board members) in International Village BIA.



## International Village Member Interview Feedback Report

September 2017

Conducted by Page by Page Consulting

### How long have you been in business?

In total, the businesses interviewed had 162 years of service in their businesses!

25% less than 1 year

17% between 10 and 15 years

17% more than 40 years

41% between 2 and 9 years

### Why did you choose to open your business in International Village?

I wanted my business to be downtown (5 respondents)

I took over an existing business (3 respondents)

Reasonable rental rates (3 respondents)

Additional comments included:

- To fill a gap in the demand for my product
- I saw the rise in downtown intensification
- Loved the look of the building
- Close to the hotel and potential clients
- It was property zoned for my business
- I live nearby
- It was unique and different
- The space was unique and close to anchor businesses
- There was good foot traffic
- I wanted to choose a young, rising neighbourhood
- I was naïve
- I wanted a community-oriented group of businesses
- At that time, downtown was thriving

### How does your business engage with the BIA? (select all that apply)

Social media	(8)	Event Participation	(9)
Annual General Meeting	(7)	Emails/Phone	(9)
In Person/BIA Office	(6)	LRT Open House	(7)
Board meetings	(2)	None	(0)

*(Proviso: Some respondents indicated that they had gone to meetings but not always. Others indicated that have participated in events but not always.)*



### **What is the current biggest threat to your business?**

LRT (8 respondents)

Property standards (2)

Other responses included:

- Lack of visibility to my business due to my location
- Area looks unsafe
- Personal motivation
- Homelessness downtown
- Lack of foot traffic
- Marijuana Dispensaries
- Staying competitive
- Cost of doing business i.e.: parking

### **What is your biggest business success to date?**

- Longevity
- Surviving the downtown core
- Building numerous community connections (2 respondents)
- Readers' Choice Award
- Built a solid business reputation
- Pride in overcoming adversity
- Pride in my employees
- Choosing the right location for my business
- November fashion show
- That I run a profitable business in a short period of time (2 respondents)
- Business growth

### **Do you know how BIAs are funded?**

Yes (2 respondents)

No (10 respondents)

### **What is your business' annual BIA levy?**

Don't know (11 respondents out of 12)



*Proviso: Many businesses are tenants and have no knowledge of the BIA levy for their building and how much they are paying directly.*

**What is your understanding of the general role of any BIA?**

*(Respondents were encouraged to list as many answers as they could think of)*

- Promotions and Advertising (9 responses)
- Building a sense of community (3 responses)
- Events (4 responses)
- Advocating for businesses (5 responses)
- Supporting business
- Education
- Clean and Safe (2 responses)
- Liaise between businesses and the community
- Information and communication
- Beautification (3 responses)
- Recruit new businesses (2 responses)
- Improving the area reputation (2 responses)
- Creating a positive area for businesses to operate (2 responses)
- Help solve problems for businesses (2)
- Relationship building for businesses

**Do you know how many BIAs there are in Hamilton?**

*Some respondents could name a few, others had no idea and all were surprised at the number - 13*

**List the activities of the BIA in a priority sequence according to what's most important to you:**

New Business and Recruitment/Real Estate	2	6	2	6	4	1	2	2	4	5	4	5
Beautification and Maintenance	3	3	1	1	1	2	6	6	6	2	1	4
Marketing and Advertising	1	1	3	2	3	3	5	5	5	3	2	2
City Communications/Advocacy	6	7	5	5	2	4	4	1	1	1	7	7



Member Communications	5	5	6	7	6	5	1	4	3	4	5	6
LRT Information	7	4	4	4	5	6	3	3	2	1	6	1
Events	4	2	7	3	7	7	7	7	7	6	3	3

If we look at the results in terms of trends, in general, the following statements would be true:

- Events are least important
- Beautification and City Communications/Advocacy are tied for most important
- Marketing and Advertising sits scores most consistently in the middle
- New business recruitment seems to either score high or low – people have definite opinions about this activity

#### **What is one thing the BIA could do today to help you and your business?**

- Nothing
- Grant funding for LRT
- Continue LRT battle
- Get local media to their business
- Dumping in the alley
- Continue LRT Communication
- CIP Grant info
- Host a member event so I could get to know other business owners
- Spend more money on beautification and maintenance
- Help with my challenges at City Hall (2 responses)
- Work with building owners to help them to be more tenant-friendly
- Clean up the area
- Set up a property standards council (clean up team)

#### **How do you measure the value of the BIA?**

- From the feedback, I get from my customers/clients (2 responses)
- The # of positive relationships they build
- The general success of the area (2 responses)
- The amount of foot traffic (3 responses)
- The # of vacancies (3 responses)
- The # of new businesses (2 responses)





- The # of events (they can be small)
- Increase in reputation
- Variety and change in demographics
- Quantity of communications
- Quality and variety of businesses
- How much they know and are interested in my business

**In what areas do you feel you and the BIA share a common vision for International Village?**

- I don't know their vision (10 respondents)
- Our vision aligns, we want the same things (1 respondent)
- I haven't shared my vision – maybe I should (1 respondent)

**In what areas do you feel you differ from the BIA's vision for the area?**

- Media, media, media

**Do you feel you understand the structure of the BIA Board and the chain of command?**

- Yes (12 respondents)

**The comments have been categorized for easier consumption as follows:**

**Negative**

- Considering a new location because of LRT
- Like the idea of Light Rail but not loving it coming in front of my business
- Not sure we always get value for money from the BIA
- Councillor is less than responsive
- Downtown has a dark side
- Don't know the true mandate of the BIA
- Events held at Ferguson Station don't benefit everyone
- Using alleys during LRT isn't realistic – there are too many problems back there

**Neutral**

- I'm on the fence about LRT – I see both sides
- LRT is not a concern being off King Street
- Hard to get businesses to participate



- LRT could be good for business but understands peoples worries
- My vision for the BIA is "Big lights that say here we are. Safe. Lots of pedestrian traffic and people who want to walk the area
- I get and read all BIA emails/communications

### **Positive**

- Events are good for business
- I care about the area – makes me have a lot in common with other members and BIA
- Realize it's impossible to make everyone happy
- All the BIA is important –hard to prioritize
- My vision is a family-friendly destination for shops and experiences

### **Actionable**

- BIA now to help mitigate the impact of LRT (6 responses)
  - What we don't know about LRT is what we're most afraid of
    - Help education residents about supporting businesses during LRT construction
    - Help BIA members communicate with customers during LRT
- Xmas and flower plants need to go as far as the hotel on Main
- The newspapers never write editorials about International Village – could the BIA work with them?
- Annual networking evening with no agenda (2 responses)
- Old architecture is a story about downtown rarely told
- Lot more food and restaurant options (2 respondents)
- Rebranding the BIA would help the area – like the name but needs to be edgier.
- Garbage pick- up on Mondays doesn't make sense with many businesses closed – could it be changed?
- We are expanding into retail and could use some advice
- More co-op advertising opportunities
- Believe in guerilla marketing and want to do it with the BIA
- Help to break through the city red tape
- Events don't have to be big
- Want lots of communication
- Do fewer things but do them well





## **9.0 Strengths Weakness, Opportunities, and Threats**

### **9.1 Workshop #1 Feedback**

In February 2018, a workshop with International Village BIA staff and members was organized. During the presentation and discussion, the following were key discussion items in terms of business development and increased visitation.

#### **Cleanliness and Safety**

- Safety remains a paramount concern especially in light of the number of cannabis stores operating illegally in the BIA
- With improvements in the Downtown, there needs to be a continued emphasis on keeping the area clean and safe

#### **New Development**

- Agreed that new developments will be required in the BIA and nearby as businesses will have to adjust to less on-street parking

#### **LRT**

- Most businesses are anxious about LRT and although remain supportive of the concept they require more concrete details related to timing and outcomes

#### **Streetscape**

- Want a customized streetscape plan that is unique to International Village and LRT realities rather than a similar design used elsewhere such as Gore Park
- BIA wants to maintain the Victorian village look and feel

#### **Brand Identity**

- The BIA acknowledges that a refreshed brand is required in the post LRT world but are undecided on whether to begin the process now so that the new brand is ready when the LRT is complete or to wait till the LRT is well on its way to completion
- BIA believes that starting the brand refresh now would be warranted

#### **BIA Website**

- BIA to focus on an updated website which can be easily updated by BIA staff rather than outside contractors
- When the new brand is ready to launch, the BIA website can easily transition to the new brand

**Parking**

- Office parking strains are felt throughout the BIA
- New developments should include public parking access

**BIA Boundaries**

- Could expand BIA to the east and south

**Redevelopment Priorities**

- Need to increase residential density near the transit stations

**Missing Businesses**

- Focus on who the new businesses will be in International Village rather than only on what types of businesses



## 9.2 SWOT

### Strengths

- Growing residential and mixed-use buildings that support local neighbourhood concept
- Increased visitation to International Village overall
- Increased investment by tenants and property owners
- Increased daytime and nighttime activity that builds an 18/7 type retail commercial economy
- Intimate historic street setting along King St. E. of primarily intact heritage buildings

### Weaknesses

- Lower household income in the nearby trade areas
- Some vacancy issues but new investment as well (as noted, the vacancies tend to be concentrated in a few buildings that are difficult to lease)
- Illegal business activity (cannabis retailers) and issues related to perceived and real safety and security issues
- Concern over the loss of some surface parking lots to redevelopment that are not replaced in structured parking garages in mixed-use developments

### Opportunities

- Local neighbourhood serving retail and commercial
- Increased creative businesses for live, work, play
- An eclectic mix of businesses that are specialized in their own field
- LRT that unlocks the value of nearby land for increased redevelopment

### Threats

- Increasing competition for food services in other main streets means that International Village is less reliant on food services and international food services as part of its identity and vision
- Increasing online and technology usage for retailers means that International Village businesses need to embrace these changes as well



## 10.0 Changes in Recommendations from 2011 to 2017/2018

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

### Changes in Recommendations from 2011 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Change in BIA Executive Director provides an opportunity to review and re-affirm vision	Modifications to vision were made but the upcoming LRT construction is an ideal time for a significant brand and identity refresh
Develop roles and responsibilities and organizational needs	Continue to search out and evaluate partnerships BIA has increased participation on a number of committees
Continue to market programs that benefit and assist businesses	Work in progress but the redeveloped CPIG incentives need to be marketed better to businesses by both the City and all the Hamilton BIAs
Increased private sector and public sector investment	Work in progress
Increase internal communications	Work in progress
Continue to sit on City committees that are relevant to BIA	Constantly adjusting staff resources. BIA may hire additional staff to assist
Where possible increase BIA budget especially when there is a redevelopment	BIA budget has increased slightly but not in line with inflation or other Ontario BIAs nor with new development
Consider BIA expansion	BIA to consider this post LRT
Ensure committees are working on strategic initiatives, Consider an LRT specific committee	A re-alignment of committees has been ongoing through the use of Page by Page Consulting.
LRT	LRT is an on-going program and will be until there is a finalized contractor and a construction calendar submitted.
Property owner and broker feedback process	Attempted and is an ongoing process



Determine which parcels have a high catalytic value and target them for redevelopment	Ongoing process
Leasing information package	BIA website has comprehensive information and this report will be posted to the website as well
Review regulatory reform and incentives	Have participated in Downtown Secondary Plan, LRT, Hospitality task force, Clean and Safe taskforce, CPIG redevelopment, HABIA re-alignment, among others
Develop parking promotional programs	Ongoing process
Develop programs to help economically disadvantaged residents but at the same time discourage panhandling and loitering	BIA is currently working with the local neighbourhood associations and this is a strong mandate for these groups
A thorough economic impact assessment of LRT construction and post-construction – including wiring, landscaping, and on-street parking	Several studies have been conducted to date on the value and uplift in value due to LRT. Other elements such as landscaping and on-street parking require final confirmation from the selected firm awarded the contract
Review design guidelines and signage requirements so that they reflect an image of International Village and gateways	Signage and wayfinding are being developed for the BIA and will be addressed in LRT negotiations
Use social media for increased direct marketing	Yes
Improve marketing linkages to Theatre Aquarius	Yes
Improve parking information on the website	Yes
Post parking information on website and Twitter	Yes
Encourage businesses to use the Village in marketing materials	Ongoing process
New business openings should be marketed by BIA	Yes
Increased event ideas for Ferguson Station	Ongoing process
Develop a marketing program to increase loyalty	Ongoing process



## 11.0 Vision

### Previous Vision

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

- Enhance its appeal as an urban eclectic village complete with destination food retailers and food services
- Appeal to local residential population nearby
- Infill specialty retail that completes the urban village atmosphere

International Village BIA's vision will continue to evolve based on an eclectic village atmosphere. The intimate street setting along King St. E. will continue to serve the BIA well as an interesting place to set up a business. The evolving nature of the greater Downtown housing demand is causing increased pressure on housing located in close proximity to International Village BIA including areas such as Stinson and Corktown. International Village is a key gateway into Downtown and will serve as mix of residential, office, entertainment, and institutional rich area. Local neighbourhood serving goods and services that cater to residents and workers combined with infill opportunities based on regional demand.

The current BIA vision statement is:

**We are Hamilton's 1<sup>st</sup> BIA, home to a spirited, attractive and creative community. We offer a unique and vibrant mix of businesses - #TheVillage in your downtown.**





## 12.0 International Village BIA Action Plan

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

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

Each action item includes the following elements:

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

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

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



## 12.1 Organization

### STRATEGIES

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

### RATIONALE

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

### DESIRED IMPACT

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

### HOW TO ACCOMPLISH

The following highlights key suggested recommendations for the International Village BIA organization. It is noted that Page by Page Consulting is continuing to work with the BIA organization on strategic planning, visioning, governance issues, and positioning the organization so that it can address future issues, challenges, and opportunities.



### Organization Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Hire marketing staff person	<ul style="list-style-type: none"> <li>Job description, budget allocation</li> </ul>	<ul style="list-style-type: none"> <li>Support the organization through LRT and focus on marketing aspects</li> </ul>	BIA	Immediate
Increase internal communications	<ul style="list-style-type: none"> <li>Commit to key deliverables such as monthly email newsletter, weekly email blast, six networking socials, two workshop learning sessions, BIA website member login and Facebook page for members only</li> </ul>	<ul style="list-style-type: none"> <li>Develop a calendar of communications correlated to different mediums</li> <li>Ensure BIA database is current – if not, work with City to get contact information</li> </ul>	BIA Executive Director	Immediate and ongoing
Increase BIA Budget	<ul style="list-style-type: none"> <li>Minimum growth with inflation and allows natural increase with the total assessment increase</li> </ul>	<ul style="list-style-type: none"> <li>Assessment value of BIA and keep the budget at a core rate compared to assessed value (look at past assessment values)</li> <li>Consider a larger increase in line with normal BIA duties and LRT duties</li> </ul>	BIA with assistance from City of Hamilton	Immediate to Short Term



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



		<p>changes are merited</p> <ul style="list-style-type: none"> <li>• BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to International Village BIA, are business competitive or complementary, and pros/cons on BIA levy</li> </ul>		
<p>Focus AGM and other meetings on positive learnings</p>	<ul style="list-style-type: none"> <li>• AGM participation and feedback process</li> </ul>	<ul style="list-style-type: none"> <li>• Set AGM agenda that focuses on learning, education, and positive changes happening in the BIA</li> <li>• Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z,</li> </ul>	<p>BIA</p>	<p>By next AGM</p>



		grants, and incentives, etc.		
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## 12.2 Economic Development

### STRATEGIES

International Village BIA will provide an opportunity for:

- Retail and commercial businesses to continue to thrive and expand to ensure that International Village businesses and the greater Downtown is an economically sustainable community (employment for local residents and fiscally sustainable tax base)
- Attract high-quality workforce to live and work in International Village and in the greater Downtown Hamilton area (live work play)
- Nurture local entrepreneurs to start up and expand new businesses in the BIA
- Attract outside investment

### RATIONALE

- Allows for new business sectors to grow and take advantage of International Village and in the greater Downtown Hamilton attributes including higher density live and work clusters and high quality of life attributes
- Allows International Village BIA businesses to stay competitive and innovate.
- Increases real household income of local residents.
- Increases tax base for the City.
- Builds on the identity and character of BIA.
- Creates a diversified economy.

### DESIRED IMPACT

- Diversified retail and commercial economy in select growing and sustainable business sectors.
- Depth and specialization in each of those sectors so that they continue to grow and draw further investment.
- Local neighbourhood supporting retail goods and services to support the growing residential density of young professionals and empty nesters.
- Creative employment opportunities for local International Village and Downtown residents (including youth, young professionals, families, active seniors, and empty nesters).



## **HOW IT GETS DONE**

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

### **Five Key Strategies**

The economic development plan follows five key strategies to be carried out by the City and the BIA:

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





### **Identify Opportunities, Gaps, Strengths to Build Upon**

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

- Local partner(s) active in the sector and interested in participating (time and resources) in its expansion. Appropriate partners might be:
  - local businesses interested in their own expansion by increasing local critical mass in the industry, strengthening their supply chain and the market for their services/products, building the local labour pool of specific skills, etc.
  - institutions such as Hamilton Tiger Cats, McMaster University (although not in the BIA), owners of cultural venues (Theatre Aquarius), who are interested in partnering
- Good regional growth prospects; this is best assessed at a fine-grained level since very narrow and specific industry niches often present the strongest growth opportunities



### Menu of Potential Sector Development Opportunities

	Description	Rationale and Tactics
Education Centre	Support expansion of programming at McMaster Downtown campus locations into International Village and / or attract other specialized post-secondary schools and research institutes Support student recruitment	<ul style="list-style-type: none"> <li>• Work in partnership with universities and schools</li> <li>• Identify potential expansion opportunities and pitch International Village, Downtown, and Hamilton's lifestyle, walkable in the greater Downtown, competitively priced available floor space and vacant lots, student infrastructure and testimonials</li> </ul>
Incubator	Small-scale value-added local production: food, agriculture, artisan manufacturing, on farms and in Hamilton; retail distribution in Hamilton and International Village stores, temporary markets/kiosks, restaurants.	<ul style="list-style-type: none"> <li>• Build off of the success of the mustard factory</li> <li>• An underdeveloped resource that diversifies employment opportunities, adds income and strengthens Hamilton's cluster of authentic artisan products (attracts destination shoppers and tourists + more entrepreneurs and small businesses wanting to work in a supportive ecosystem)</li> <li>• Develop in partnership with the value added agricultural/food based community, artisans, existing micro-businesses, local institutions and with potential provincial support</li> <li>• Build a "food entrepreneurship ecosystem" tailored to the needs of the community; might include instruction on health and safety regulations and food business operation, market distribution facilitation (e.g. "product tastings" at events, booths at Farmers Markets, co-tenancy in stores, help to organize food stalls in other markets, events, trade shows, facilitate linkages to food product export channels), shared production facilities (e.g. "kitchen incubators") or noting access to community kitchens nearby, connections to "angel" investors, etc.), brew pubs, etc.</li> <li>• Facilitate a network (perhaps in partnership with aligned arts organization or institution such as a Hamilton Arts Council) to explore their needs and best practices and</li> </ul>



	Description	Rationale and Tactics
		<p>build strategy and ecosystem to support their growth. Tactics parallel those described above for food.</p> <ul style="list-style-type: none"> <li>• Start by identifying Hamilton residents currently making and selling artisan products (e.g, Etsy).</li> <li>• Encourage craft type markets</li> </ul>
Digital and Creative	Creative industries - website, software and App design and development, marketing firms, architects, designers, etc.	<ul style="list-style-type: none"> <li>• Prerequisite: high-speed broadband internet (at least 50 Mbps download/10 Mbps upload) and wireless connectivity.</li> <li>• Start with detailed research into regional potential, competitive landscape, and current activity in Hamilton. Identify a niche development opportunity. Build strategy and ecosystem to nurture innovation and support growth.</li> </ul>
Arts & Culture	Performing and visual arts, community heritage, multi-cultural traditions	<ul style="list-style-type: none"> <li>• Leverage assets in the International Village BIA such as Theatre Aquarius and Ferguson Station, and those nearby such as Hamilton Arts Council, Hamilton Place, Art Gallery of Hamilton, Library, Jackson Square, etc. as venues for display and performance.</li> <li>• Partner with venues including cafes and restaurants and local arts organizations.</li> <li>• Pursue two-stream strategy: 1. Nurture and develop opportunities for local artists and performers to earn income and gain exposure to broader audiences (tactics similar to those described for artisans); 2. Support enhanced programming, festivals and exhibits (temporary and permanent) at venues. Include both locally based programming and attraction of touring groups/performers/exhibits and festivals.</li> <li>• Synergy with tourism development. Build a reputation of Hamilton as a regional destination for culture (to amplify the voice of Hamilton to the regional community)</li> <li>• Enhance the night time economy</li> </ul>



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



## Key Retail Sector Opportunities

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

### King St. E.

**Location:** King St. E. from Mary St. to West St.

**Niche:** Eclectic Village

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

#### Requirements for Success:

- Walkable street
- Key access point and multiple access points from nearby residential to King St. E. – streetscaping support that pulls local residents into King St. E.
- Use of urban plazas for people gathering and community building
- New gateways to Downtown with LRT route
- Some entertainment-oriented aspects with bright lights, lit up buildings, artwork, gateways
- Places for ephemeral, constantly changing, performances, art, etc.
- Locations for pop up music venues both small and large
- Better facades, large windows, limited use of window barriers, ground level animation

#### Commercial Mix:

- Grocers, specialty food, greengrocers, pharmacy, drug store items
- Breakfast and brunch places
- Cafes, coffee, tea
- Quick casual restaurants and cafes (breakfast, cafes/lunch, coffee/tea, and quick casual dinner), blurring such as game cafes (already exist), barber shops with alcohol service, etc.
- Night time economy restaurants, pubs, hangout places, brewpub
- Other neighbourhood retail and services – hardware store, beauty services, barber shops, dry cleaners, travel agents, bakery, pet supplies, veterinary services, medical and dental services
- Specialty leisure-oriented retail including sportswear, activewear, (e.g., specialized sporting goods store with a mini basketball area set up inside), book and music stores,



- Creative offices on upper levels
- Fitness, creation, dance, martial arts on upper levels
- Entertainment such as small movie house on upper levels
- Add in library, community centres, and potential for another performing arts venue (cluster performing arts together)

### **Main St. E.**

**Location:** East Mary St. location

**Niche:** Highway commercial and transformed into mixed-use higher density

**Target Markets:** Daytime office workers and visitors, local residents, regional visitors, pass by traffic – related to those who want visibility

#### **Requirements for Success:**

- Create a two-sided retail street through infill redevelopment opportunities
- Build retail in close proximity to the lot line with parking at the rear
- Signage, windows, entrances, and ground floor retail heights that match the look and feel of a retail street that has high visibility
- Opportunities for side street, rear, and upper-level patios
- Upper levels used for creative offices that blend work and eating as well as those businesses that blur lines between office and retail (e.g., a coffee shop that allows shared work environment)
- Large, good quality streetscape materials with wide sidewalks

#### **Commercial Mix:**

- Office, residential, institutional and retail mixed use
- Increased entertainment
- Local serving and office worker type goods and services including grocers, cafes, fast casual restaurants, dry cleaners, travel agents, florists, etc.
- Unique restaurants, cafes, coffee/tea, breweries,
- Shared work and retail spaces
- Blurred retail categories
- Creative offices on upper levels



### **King William Street**

**Location:** East Mary St. location

**Niche:** Entertainment focus

**Target Markets:** entertainment visitors and attendees, daytime workers, local residents including new residents moving into the new housing nearby

**Requirements for Success:**

- Extend King William success from west of Mary to east of Mary
- Infill with mixed use residential, office, and entertainment focused retail (including food services)

**Commercial Mix:**

- Office, residential, institutional and retail mixed use
- Increased entertainment and experience based retailing including food services with patios as well as specialty food
- Local serving and office worker type goods and services including grocers, cafes, fast casual restaurants, dry cleaners, travel agents, florists, etc.
- Unique restaurants, cafes, coffee/tea, breweries,
- Shared work and retail spaces
- Blurred retail categories
- Creative offices on upper levels

The remaining strategies are based on the suggested recommendations.



### Economic Development Suggested Recommendations

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





		<ul style="list-style-type: none"> <li>• Hamilton expatriates (“Come Back to Hamilton” campaign)</li> <li>• GTA residents</li> <li>• Independent and small chain franchises</li> <li>• Graduating post secondary students</li> <li>• Others</li> </ul>		
Strengthen infrastructure	<ul style="list-style-type: none"> <li>• Business turnover decreased</li> <li>• New business openings</li> </ul>	<ul style="list-style-type: none"> <li>• New streetscape plans</li> <li>• Investment in WiFi in Downtown including International Village</li> <li>• High-speed internet and broadband width</li> <li>• Parking strategy</li> <li>• Transit strategy</li> <li>• Incubators and a complete range of office tenancies</li> </ul>	BIA and City	Mid to Long Term
Make Investment easier	<ul style="list-style-type: none"> <li>• New business openings</li> <li>• New mixed-use developments</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce costs, risks, and barriers to investment including</li> </ul>	<ul style="list-style-type: none"> <li>• City and BIA</li> <li>• BIA to educate themselves and attend training on development pro</li> </ul>	<ul style="list-style-type: none"> <li>• Medium Term</li> </ul>



		<ul style="list-style-type: none"><li>• Competitive tax rates, development friendly approval processes, market current opportunities</li><li>• Develop sector-specific recruitment materials</li><li>• Review all incentives and marketing of incentives against the economic development plan</li><li>• Increased residential and office mixed-use developments</li></ul>	<p>formas and industry terms to ensure the BIA understands key redevelopment issues and opportunities</p> <ul style="list-style-type: none"><li>• BIA can support development opportunities and commission economic impact studies that support redevelopment with public parking</li></ul>	
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## 12.3 Physical Improvements and Programs for Enjoyable Shopping

### STRATEGIES

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

### RATIONALE

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

### DESIRED IMPACT

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

### HOW TO ACCOMPLISH

#### Parking

- Develop a complete toolkit -solutions based on affecting supply, management, and marketing. This includes reviewing the number of publicly available spaces.
- Placement of maps and directional signage at the entrance to central lots.
- A marketing program to remind visitors to park in long-term lots for longer stays.
- Ensure public parking is considered as part of every mixed-use development (whether it is ultimately included or not is subject to the evaluation).
- Use digital media as part of parking strategy including the use of new mobile paying programs (to be introduced).



### **Hours of Operation**

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

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

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

### **Patios**

- The patio program from the City of Hamilton is still evolving. The BIA should continue to monitor its success and make changes as needed.

### **Multifunctional Street Art and Amenity**

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

### **Proper Use of Lighting**

- Safety is paramount in terms of any discussion around lighting. For International Village BIA, lighting should be used to create an intimate setting along King St. E. for visitors to “see and be seen” and along Main St. E. lighting should be more entertainment focused including lighting up buildings and creating a more ephemeral lighting program (constantly changing).



### Physical Improvement Suggested Recommendations

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



		increase signage to Downtown <ul style="list-style-type: none"><li>• Constantly update any digital wayfinding elements</li></ul>		
Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases	<ul style="list-style-type: none"><li>• Conduct a study</li></ul>	<ul style="list-style-type: none"><li>• Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy</li></ul>	BIA and City of Hamilton	One year



## 12.4 Marketing

### CONTEXT

- Transition the BIA marketing and branding to coincide with new density investment and LRT.

### STRATEGIES – in terms of time frame

10. Hire a marketing director.
11. Update International Village brand (refresh brand) based on changing nature of the area including LRT, increased residential and neighbourhood shopping focus.
12. Update website to reflect changes.
13. Include LRT communications program and develop a communications protocol related to LRT updates and helping members stay informed.
14. Review events in light of LRT changes.
15. Use potential free Wi-Fi as a loyalty program and marketing outreach to visitors who use it
16. Ensure International Village has a new brand, image, events program for post LRT realities.
17. Physical branding elements such as the gateways need to be redeveloped for a post LRT streetscape.
18. The BIA can use the brand as part of their retail, commercial, and office attraction program.

### RATIONALE

- International Village BIA brand is better today known than in the past but still not well recognized.
- There is less emphasis on the international component and more emphasis on the local urban neighbourhood that is evolving in the area.
- Allows the BIA to have a clear message to members and other stakeholders on the changes occurring in the BIA, in the Downtown, and the LRT (allows International Village to evolve with changes to residential and LRT in order to stay relevant and fresh).

### DESIRED IMPACT

- One consistent, focused brand story that will allow for local and regional visitation, allow for the BIA to evolve post LRT, and continue to attract local entrepreneurs and outside investment.
- Build positive momentum stories and PR related to changes to counter negative perceptions around the loss of business, illegal activities, safety issues, etc.



## 13.0 Planning Context – International Village BIA

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

### 1. Introduction

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

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

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

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

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





## **2. Official Plan and Zoning By-law Designations for International Village BIA**

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

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

King Street west of Wellington also is designated a Heritage Character Zone.

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

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

### **Permitted and Restricted Land Uses**

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

- Motor vehicle dealerships, gas bars, service stations, car washing establishments drive-through businesses and dry cleaning plants are not permitted;
- Vehicle rental businesses must be fully enclosed within a building;
- Amusement arcades and garden centres are only permitted as accessory uses (i.e. another permitted activity such as a grocery store or restaurant is the predominant use);
- Microbreweries must be no larger than 700 square metres;



- New commercial parking structures must be fully enclosed within a building and the ground floor must be used for other permitted uses.

D2 Zoning places additional limitations on the following uses in the Pedestrian Focus Street on the King Street frontage:

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

### **Building Heights**

The Zoning By-law specifies a minimum height of 7.5 metres (2 storeys) in D1 districts and 11 metres (3 storeys) in D2 districts (properties fronting on King Street). The maximum heights along Main Street are up to 91 metres. In the rest of the BIA, 44 metres is the maximum height (detailed on map in Schedule F of the Zoning By-law). Both the new zoning bylaw and the recently adopted changes to the Official Plan have been appealed to the LPAT.

The Secondary Plan establishes policies to be considered when reviewing applications for taller buildings than are permitted by the Zoning By-law (Section 6.1.4.10). These include ensuring that no buildings are taller than the Niagara Escarpment, avoiding adverse impacts from shadowing and wind tunnels, and general sensitivity to the character of the surrounding district and neighbourhoods. The Plan permits heights of up to 30 storeys along Main Street and up to 12 storeys in the rest of the BIA (detailed on Map B.6.1).

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

### **Built-form and Design**

In all Downtown Mixed-Use Areas:

- There are no minimum building setbacks;
- Maximum setbacks are 2 metres for the portion of the building below 11 metres (approximately 3 storeys). As noted above, towers can be set back further than 2 metres above an 11 metre high podium);



- New buildings must have ground floor facades at least equal to 75% of the lot width, and on corner lots at least 50% of the combined lot widths;
- Parking or aisles/stacking lanes are not permitted between the building façade and the sidewalk;
- Access to buildings is to be at the street level. There must be at least 1 principal entrance on the ground floor façade in new buildings. Ground floor facades shall have doors and windows open to the street.

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

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

### **Parking Requirements**

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

- Residential Uses must provide a minimum of 0.3 spaces and a maximum of 1.25 spaces per unit,
- Offices must provide 1 space per 50 m<sup>2</sup> above 450 m<sup>2</sup> of development (no spaces are required for less than 450 m<sup>2</sup>),
- Parking requirements are not specified for retail stores, restaurants and most types of personal services.

Bicycle parking is required for new development.

- Most commercial uses must provide 5 short-term bicycle parking spaces,
- Multi-unit residential development must provide 0.5 long-term spaces per unit,



- Commercial development between 450 and 1000 m2 must provide 2 spaces per unit (the requirement increases for larger developments).

### Heritage Conservation

Additional built form requirements are included in the BIA's Heritage Character Zone (properties fronting on King Street west of Wellington) to ensure that new development is sympathetic to the area's early 20<sup>th</sup> Century commercial architectural heritage:

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

### Mobility and Traditional Streets

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

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

Street & Function	Design Objectives
<b>Mobility Streets</b>	
King St.	<ul style="list-style-type: none"> <li>• Widen public sidewalks where feasible</li> <li>• Provide additional on-street parking where feasible</li> <li>• Strengthen pedestrian and cycling linkages</li> <li>• Provide seating at transit stations where space permits</li> </ul>
Main St.	<ul style="list-style-type: none"> <li>• Widen public sidewalks where feasible</li> <li>• Recognize through traffic needs</li> </ul>



	<ul style="list-style-type: none"><li>• Improve pedestrian/vehicle separation through wider sidewalks, tree plantings, and parallel parking</li><li>• Strengthen pedestrian and cycling linkages</li><li>• Provide additional on-street parking where feasible</li></ul>
Wellington St.	<ul style="list-style-type: none"><li>• Recognize through traffic needs</li><li>• Establish a safe pedestrian environment with appropriate separation from vehicles</li></ul>
<b>Traditional Streets</b>	
Ferguson Avenue	<ul style="list-style-type: none"><li>• Has a completed Master Plan</li></ul>
King William St.	<p><u>See completed Master Plan for details:</u></p> <ul style="list-style-type: none"><li>• Don't accommodate surface parking</li><li>• Introduce pedestrian amenities</li><li>• Permanent and temporary public art and community art should be encouraged in keeping with the precedent set by the Art Walk Program</li></ul>

### **On Street Patio Program**

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



## 14.0 Trends

Trends are based on three overarching themes:

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

### RETAILER AND COMMERCIAL BUSINESS TRENDS

#### Omni-channel

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

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

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

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



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

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

### **Smaller Retail Formats**

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

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

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

### **Mobile**

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

### **Solid Retail Principles Still are Key**

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



## **Technology Driven Innovation**

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

- Sensor-based technology
- Big data
- Online

### **Sensor-Based Technology**

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

### **Big Data**

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

### **Online**

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

## **FOOD SERVICE TRENDS**

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





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

### **Examples of Neighbourhood Food Driven Successful Concepts**

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

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

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

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



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

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

#### **Examples of Hybrid Concepts – Blended formats**

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

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

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



fully integrating their product offering with food and entertainment to create comprehensive consumer experiences.

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

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

## **CONSUMERS CHANGES**

### **Buy Low Buy High**

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

### **Food Shopping Throughout the Week**

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

### **Demographics Are Destiny**

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



### **Mediocrity Won't Cut It**

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

## **ORGANIZATION AND GOVERNANCE**

### **Leadership is King**

As the saying goes, 90% of life is showing up. Investing in main street leadership pays off. The relationship-building and partnership return on investment illustrates that more can be accomplished through positive leadership than if one person is trying to do it all. Leadership payoff results in a multiplier effect that can take one dollar of investment or one hour of resource time and transform it into more than one. Façade improvement programs and streetscaping cost sharing are key examples whereby one dollar of private sector money is matched by the municipality and/or other fundraising or sponsorship or grant monies to produce much greater results than would be if the programs were not in place.

### **Capacity Building and Return on Investment of BIAs in Their Community**

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

- Engagement: Downtown's or a main street organization's top priority is to achieve greater membership engagement. It is also one of the top successes they have achieved in the past five years. To achieve greater membership engagement success, organizations in urban renewal had to apply innovative engagement skills to encourage participation. This could take the form of a guaranteed return call policy, changing BIA reporting forms to match the City's forms, municipalities supplying BIAs with office space, online polling by BIA membership, and communicating success stories.
  - Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. Developing innovative BIA programs needs to have the support of the membership. This includes factors such as leadership, staffing, active board members, communication, and active volunteers.
  - Engagement successes are related to three factors: (1) relationship building, (2) capacity building, and (3) social capital investment. Using the saying "through many hands comes light work" the BIA is able to leverage good working relationships to the benefit of the members. This is key for smaller BIAs and BIAs located in smaller communities.



- Other key successes are centred around key programming such as events, marketing, beautification, and fostering a business mix and new innovative business openings that support the BIA strategic plan. During the interviews, BIAs discussed examples of these programs and pilot type projects in their communities that illustrated how they measured their success. It can be argued that events and marketing are related to demand-side economic development and beautification and business mix are related to supply-side economic development. An understanding of how events, recruitment, beautification can support economic development is a major breakthrough.
- Finally, a key to success is having a Strategic Plan that is realistic, achievable within a four to five-year time frame, and designates responsibility.
- BIA Relevance: BIAs need to constantly challenge themselves to prove, through measurement indicators that they are relevant, important, and necessary to telling the BIA success story. This story must be shared at all levels of government and their membership.
- Uniqueness: A BIA should be recognized as unique and should not be forced into a one-size-fits-all approach. The Return on Investment indicators chosen by the BIA should provide each BIA with the tools needed to share their story, and their success, without attempting to sterilize the unique nature of each business district. With that, there are still common threads of success regardless of a BIA's own competitive positioning. It is the consistent measurement of these threads that will build a collective understanding of the role BIAs are playing in their communities. These threads include measuring tangible signs such as business resiliency including vacancy, business longevity, and business mix.
- Governance Model: BIA governance model is being tested and pushed into different directions that challenge the traditional norms of BIAs only working on beautification and marketing. There is emerging, a vast array of unique successes that BIAs have achieved through pushing the limits of what the governance model allows. This has been in the areas of economic development, unique partnerships, fundraising for programs, championing density, etc. Organizations have developed parking programs and own parking lots, others have hired planners to challenge density heights, others have conducted economic impact studies on behalf of development to encourage greater density, others have partnered with the municipality to fundraise for a \$6 million urban plaza redevelopment, among others.
- Economic Drivers and Community Builders: Some BIAs are able to see the greater importance of their advocacy, marketing, and facilitator components to create greater economic development and community building within their BIAs and in their areas of influence surrounding the BIA.
- Priorities of a BIA: The priorities of each BIA should be different. There is not one path towards the improvement of the BIA area. Rather, the BIA should customize their measurement tools as set out in each BIA's Strategic Plan. The Strategic Plan will guide the business mix, the programming, and community engagement efforts. It is essential to note that community engagement is an over-arching element of the overall activities and programs carried out by BIAs.



- Partnerships and Communication Matters: At present, many Downtowns and main streets with smaller membership sizes (under 200 members) and in smaller communities (under 50,000 people) are more reliant on creating partnerships and having to create better communications vehicles to different audience members to build support compared to larger BIAs. However, it is also true that BIAs that have developed a highly specialized business mix in traditional retail or in food services have also relied heavily on developing a broad range of partnerships through excellent communication on their successes. Partnerships between municipalities and BIA varies. However, as a general rule, the stronger the municipal partnership, the greater awareness of the BIAs role in the community, results in greater success.

### **Determining Issues That are Symptoms of Greater Problems**

- Parking, hours of operation, and other hot-button topics are often difficult to address. At first, it is important to understand that often these issues are tactical issues and are symptoms of a greater issue. If sales were strong then parking availability may be less an issue. Peer pressure should be used to combat hours of operation issues. However, focusing on good business economics should remain the focus rather than constantly going down the rabbit hole of these issues such as parking and hours of operation.

## **PHYSICAL DESIGN**

### **Universal Principles of Good Physical Design**

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

#### **1. Safety**

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

#### **2. Cleanliness**

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



### **Length of the Main Street Area**

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

### **Streetscape**

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

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

### **Signage**

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



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

### **Urban Plazas**

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

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

### **Useable Outdoor Space**

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

### **Showcase windows**

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

### **Loading access**

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

### **Garbage collection**





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

**Access/egress**

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

**Attractiveness**

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