

Commercial Market Analysis for Locke Street South



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Commercial Market Analysis for Locke Street BIA

Executive Summary

Locke Street BIA is a relatively new organization in the City of Hamilton. At present it does not encompass the entire retail corridor. The action items laid out in this document are based on extensive research with on-street surveys, telephone surveys of regional residents who visit and do not visit Locke Street, key person interviews, a BIA workshop, and coordination with other stakeholders and City departments.

The action plan is based on taking a district that is performing well and enhancing it to take advantage of changes that are occurring in the neighbourhood and surrounding communities. The specific action items and responsibilities include the following:

Immediate

| Action Item | Responsibility |
|--|------------------------|
| Organization | |
| Establish a committee and develop business case for BIA expansion, outlining benefits, accomplishments, and future business plan including proposed budget | Locke Street BIA |
| BIA to canvas for support and increase communication and work with non-members | Locke Street BIA, City |
| Develop a full set of communication tools depending on budgets and resource time | Locke Street BIA |

Short Term

| Action Item | Responsibility |
|--|---|
| Organization | |
| Determine future needs regarding staffing for BIA | Locke Street BIA |
| Evaluate BIA committees ensuring that the following are included: beautification (clean and safe) and urban design, events, promotions and public relations, retention and recruitment, and parking | Locke Street South Taskforce, City |
| Develop roles, responsibilities, and organizational needs of supporting and partnership groups for the implementation of the business plan (City, library, houses of worship, etc.) | Locke Street BIA, City, other stakeholders |
| Programs for Enjoyable Shopping | |
| Review beautification plans for Locke Street. Ensure there is buy-in from all property owners and businesses. Determine what is feasible given the tight sidewalks | City and partner with BIA and other Locke Street stakeholders |
| Develop a parking strategy | City and partner with BIA and other Locke Street stakeholders |
| Work on developing a hospitality program | Locke Street BIA |
| Continue to develop relations with neighbourhood groups | Locke Street BIA |
| Economic Development | |
| Hold regular meetings (two to three times a year) with stakeholders on the status of the commercial environment and upcoming changes (e.g. BIA expansion, bylaws, new commercial developments, other changes) with learnings as a key component. | Locke Street BIA |
| Commit to a program of increasing the learning of merchants and property owners through education, seminars, sharing demographic information, and increased networking. | Locke Street BIA |
| Marketing | |
| Develop a Web site | Locke Street BIA |
| Create marketing materials that capture the essence of Locke Street | Locke Street BIA |
| Enhance public relations with local media | Locke Street BIA |

Medium Term

| Action Item | Responsibility |
|---|------------------------|
| Organization | |
| Develop methods for increasing private/public sector investment including corporations, foundations, public sectors, houses of worship, and other private sector bodies | Locke Street BIA |
| Economic Development | |
| Use the existing database as a starting point to profile each business. Develop a simple retail recruitment package on why a business should locate in Locke Street. When a property becomes vacant, Locke Street will be able to react immediately with a list of prospective tenants to call upon to market the property successfully. Focus on increasing convenience goods for the entire retail corridor by 20%. | Locke Street BIA |
| Search out other complementary uses, such as redeveloping properties for higher commercial usage. | Locke Street BIA |
| Review zoning bylaws on an as needed basis. | Locke Street BIA, City |

Long Term

| Action Item | Responsibility |
|---|---|
| Marketing | |
| Develop and establish distinctive signage on the approaches to Locke Street commercial area | Town, Locke Street BIA, Locke Street businesses and property owners |
| Develop a Locke Street brand | Locke Street BIA |
| Develop a story about Locke Street to sell to brokerage community on an as needed basis | Locke Street BIA |

1.0 Introduction

Locke Street South Business Improvement Area (BIA) is a recently formed organization. Currently, it represents the businesses that front on Locke Street from Chatham/Alexander Streets to Homewood Avenue. This represents approximately 25% of the total number of businesses along the commercial corridor. The Locke Street BIA was created with input from and the guidance of stakeholders and interest groups, including the City of Hamilton.

Urban Marketing Collaborative was contracted by the City of Hamilton to develop a commercial market strategy for the newly formed BIA. The scope of work was to assess the retail area's strengths, weaknesses, opportunities, and threats, with respect to developing both short and long-term recommendations. This action plan incorporates:

- Organizational elements
- Economic development, including retail retention and recruitment
- Marketing and communications
- Other programs, activities, and policies that help the retail environment

Report Organization

This document presents a strategic commercial vision and detailed action plan to guide the development and evolution of Locke Street BIA including consideration for the entire commercial corridor. It lays out a clearly organized agenda for a series of immediate and near-term actions and projects to help Locke Street BIA to realize its full potential as a vital, distinctive, and exciting commercial street in an active neighbourhood.

2.0 Fact-finding and Analysis

The fact-finding and analysis step is vital to the development of a customized and comprehensive action plan. This section of the report provides general demographic and consumer profile data on the target markets for Locke Street South, with some specific details related to the BIA.

2.1 *Locke Street South Trade Area Delineation*

Trade area delineation is a fundamental part of any market analysis. This section of the report delineates a trade area for Locke Street South¹ based on site's location factors, the natural and man-made barriers, the direct competitive retail environment, the travel time distance, and a license plate survey.

Factors Influencing the Trade Area Delineation

The trade area is considered to be the geographic region from which a majority of the Locke Street South visitors originate. The boundaries of the trade area are influenced by the following factors:

- The size and type of the existing commercial environment
- Accessibility and visibility
- Travel time features
- Relative location and strength of competitive retail areas
- Natural and man-made barriers

In order to complement the above trade area analysis, customer-origin data was collected from a license plate survey conducted over four days in November and December 2007.

While each of these factors in isolation has a bearing on the trade area boundaries, it is their cumulative effect that leads to the definition of the trade area. The importance of each of these factors was considered for the trade area boundaries. For Locke Street South, the trade area delineation is a composite trade area for the existing 76 commercial operations for the entire retail corridor.

¹ Note that this includes the entire commercial corridor of Locke Street from Main Street West to Aberdeen Avenue.

The existing commercial environment can be defined as a historic neighbourhood setting that still retains a strong antique store draw.

Locke Street South is the commercial centre for the Kirkendall, and partially the Durand, neighbourhoods of Hamilton. The neighbourhoods are nestled against the Niagara Escarpment, providing a scenic backdrop to the commercial centre along Locke Street. While there are traditional commercial buildings, the commercial core has expanded through the rehabilitation of several homes for commercial uses. The area has enjoyed a distinct identity for antiques. It is also well known for its selection of beauty-related services. This image is slowly changing as additional apparel, home furnishings, art galleries, and food-related stores have set up shop along the street.

Recent changes include the addition of a Starbuck's coffee house (outside the BIA) as well as other cafés and redevelopment plans.

Accessibility and Visibility: Good Accessibility and Average Visibility

Locke Street South is located adjacent to Main Street. Main Street serves as a major east/west corridor throughout the City of Hamilton. It is one of the key entry points from higher income communities to the west such as Dundas, Ancaster, and Westdale as well as from Highway 403. It is also easily accessible from Aberdeen Avenue, which also connects to Highway 403. Access from the neighbourhoods on the Mountain such as Westcliffe is via Queen Street South, located near Locke Street.

While accessibility is good, Locke Street South is not a major thoroughfare and lacks high visibility. It is primarily a neighbourhood street. The relatively isolated character of Locke Street South has allowed a unique character to develop and it has become a sought after location (reprieve from the rest of the City). This is reflected in the available traffic and pedestrian volumes for relevant intersections include the following:

| | AM Peak | | PM Peak | | 7 Hr Volume | |
|----------------------------------|---------|-----|---------|-----|-------------|-----|
| | Veh | Ped | Veh | Ped | Veh | Ped |
| Locke and Aberdeen, Sept 23 2005 | 1,844 | 127 | 1,872 | 5 | 9,451 | 340 |
| Locke and Chatham, Jun 27 2002 | 520 | 45 | -- | -- | -- | -- |
| Locke and Florence, Oct 26 2007 | 354 | -- | 467 | -- | -- | -- |
| Locke and Napier, Jun 1 2006 | 343 | 31 | 416 | 19 | -- | -- |

Source: City of Hamilton

Relative Location and Strength of Competitive Retail Facilities: Competitive

For unique neighbourhood and leisure-oriented retail areas, there are several to choose from in the Hamilton and Burlington area:

- Downtown Dundas (leisure retail)
- Westdale (entertainment and restaurants)
- Downtown Burlington (main street shopping)
- Downtown Oakville (higher-end retail and restaurants)
- James Street North (art galleries)

In addition, while Beach Road Meats moved from Ottawa Street North to Locke Street South, there has been discussion that some of the antique stores on Locke Street may move to Ottawa Street. Furthermore, during the key person interviews there was discussion of retailers and residents from the West Queen West area of Toronto who have moved to Locke Street South to set up businesses. While there are a multitude of reasons for the relocation one of the partial reasons for specifically choosing Locke Street was the similar atmosphere but slower pace associated with the community.

Natural and Man-made Barriers

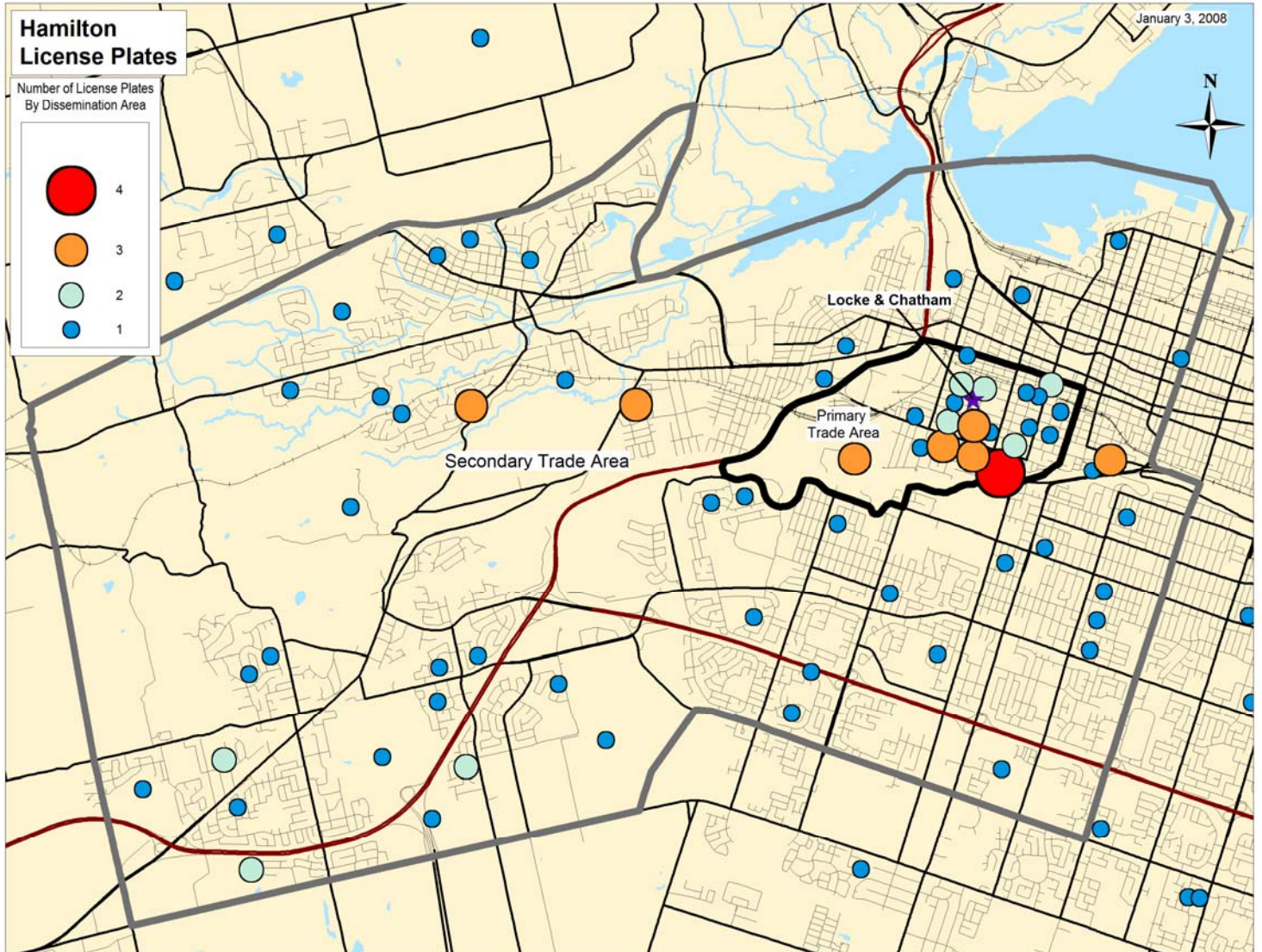
Natural and man-made barriers include:

- Rail tracks between Canada Street and Hunter Street
- Highway 403
- Escarpment
- Main Street West/King Street West
- Hill at Queen Street/Hess Street

Psychological barriers include the area's popular image as an antiques centre. While antiques are an important contributor to the overall business activity, the overwhelming image limits other retailers' ability to attract customers.

Locke Street License Plate Survey

Consumer origins, by way of Dissemination Areas (DAs) information, were ascertained from 175 vehicles parked along Locke Street South during November and December 2007. Information was accumulated over four different days. Duplicated license plates were counted only once.



Source: UMC

2.2 Trade Area Boundaries

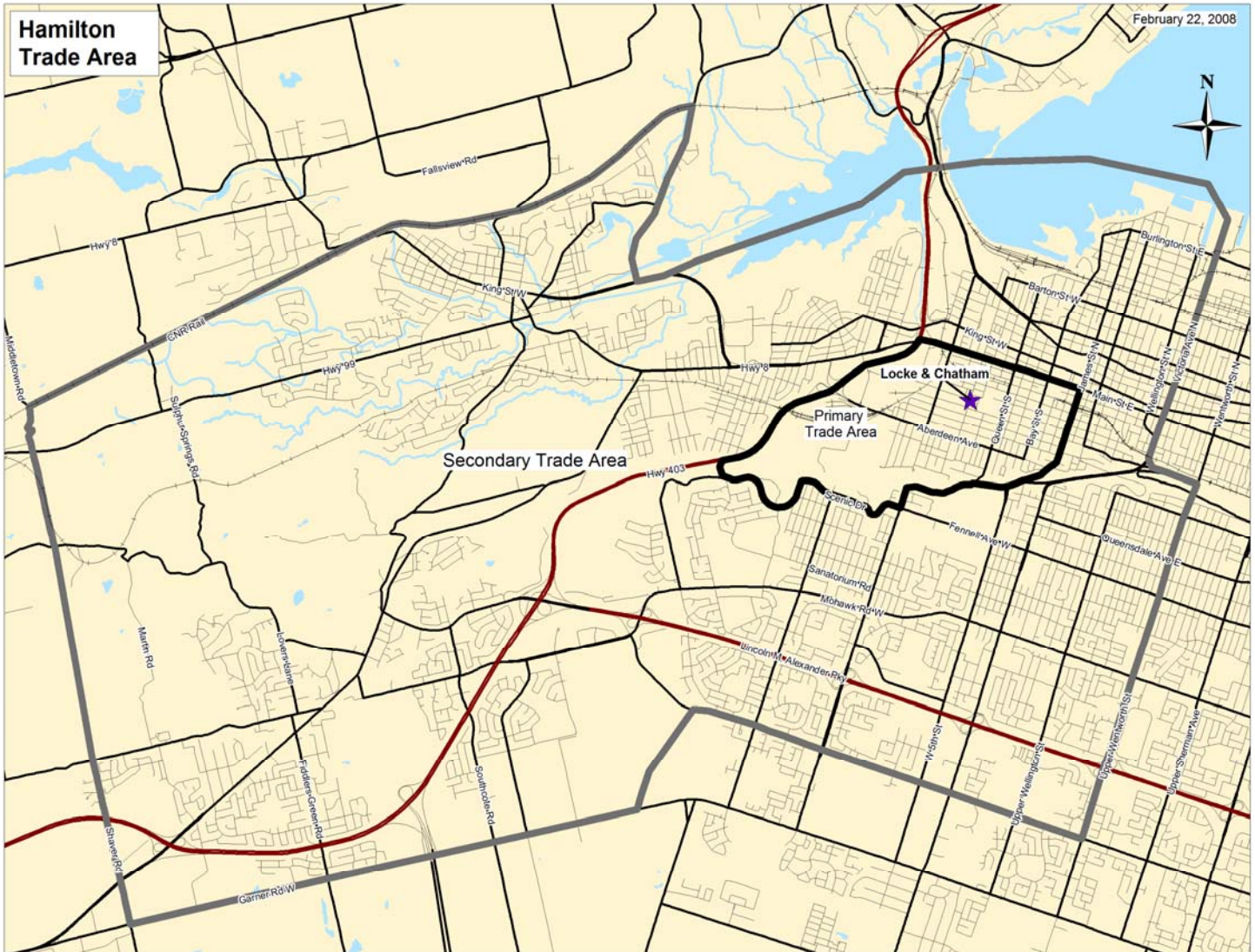
Based on the analysis from the previous section, trade areas have been developed for Locke Street South.

To identify the importance of the sub-areas, the trade area can be divided to help distinguish the significance of these areas to the retail/commercial sales potential of Locke Street. The major division is as follows:

- Primary Trade Area - includes the neighbourhoods of Kirkendall and Durand from Main Street West to the escarpment and from Highway 403 to James Street South
- Secondary Trade Area - includes the Primary Trade Areas as well as parts of Downtown Hamilton, Dundas, Ancaster, Ainslie Wood, Westdale, Corktown, Mountainview, Westcliffe, Buchanan, Rolston, and other neighbourhoods north of Stone Church Road West

These boundaries are identified on the map on the following page.

In addition, demographics for Hamilton have been provided for benchmarking purposes.



2.3 Trade Area Population Characteristics

An analysis of the demographic composition of local neighborhood area residents and West Hamilton residents provides the most accurate description of the target markets that will be generating the demand for business products and services in the Locke Street South area. The following analysis is based upon the preceding trade area analysis.

Residents

Within the Primary Trade Area there are 21,827 residents. The population has steadily increased and is projected to continue to increase by 0.6% annually. The Secondary Trade Area contains approximately 195,000 residents and is projected to grow at a slightly faster rate of 1.0% annually: this is the same rate of growth for the City. This primarily reflects suburban growth for the Secondary Trade Area and the City.

Household growth is faster than population growth, reflecting the overall shift to smaller households as larger families are replaced with singles and smaller family couples (married and common law).

There is very little difference in gender among the trade areas.

| | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|-------------------|--------------------|----------------------|------------------|
| Population 2007 | 21,827 | 194,378 | 529,028 |
| Annualized Growth | 0.6% | 1.0% | 1.0% |
| Households 2007 | 12,378 | 81,206 | 207,125 |
| Annualized Growth | 1.2% | 1.6% | 1.5% |
| Gender | | | |
| Male | 48.9% | 49.1% | 49.4% |
| Female | 51.1% | 50.9% | 50.6% |

Source: Statistics Canada, Environics

Age Profile

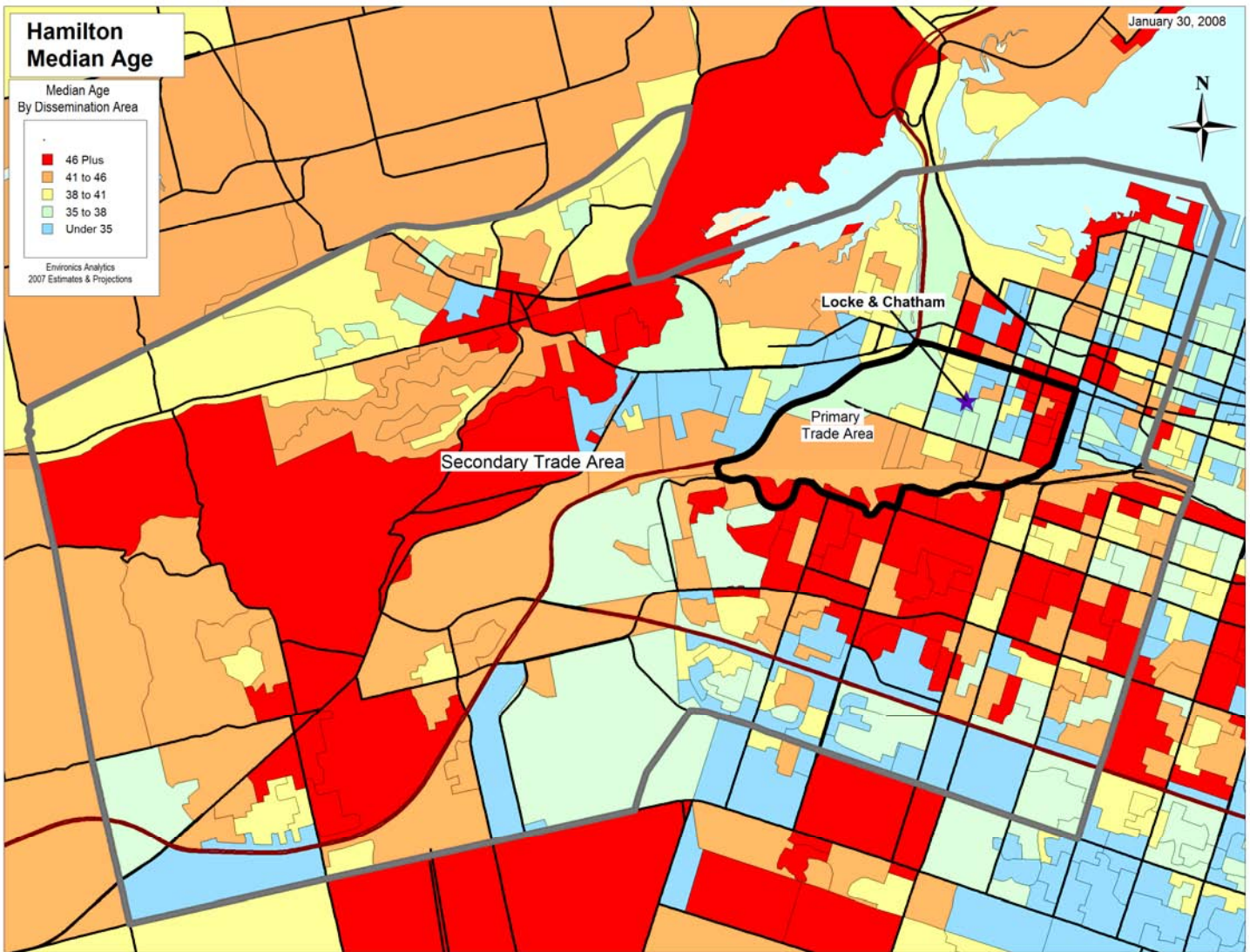
The Primary Trade Area contains a low proportion of young children compared to the Secondary Trade Area and the City of Hamilton; the Primary Trade Area has a higher proportion of 20 to 34 year olds and people over 65 years of age. The Secondary Trade Area, however, has an age profile very similar to the City of Hamilton.

Nevertheless, the high proportion of residents over 65 years of age in the Primary Trade Area pushes the median age higher than expected. The Primary Trade Area combines a diverse combination of younger and older residents.

| Age | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|------------|--------------------|----------------------|------------------|
| < 14 | 9.1% | 15.1% | 17.0% |
| 15 to 19 | 4.1% | 6.7% | 6.8% |
| 20 to 24 | 9.3% | 8.0% | 7.1% |
| 25 to 34 | 20.2% | 14.0% | 13.4% |
| 35 to 44 | 13.6% | 13.9% | 14.9% |
| 45 to 54 | 14.9% | 15.5% | 15.4% |
| 55 to 64 | 10.6% | 11.0% | 11.1% |
| 65+ | 18.3% | 15.7% | 14.4% |
| Median Age | 40.4 | 39.9 | 39.2 |

Source: Statistics Canada, Environics

The map on the following page illustrates the sharp contrast in ages within the trade areas. In essence, those residents clustered near Bay South and James Street have a higher age profile than those centred on Locke Street in Kirkendall.



Source: Statistics Canada, Environics

Household Status and Size

There are a high proportion of renters within the Primary Trade Area. Accordingly, 56% of the residents live in single person households. This figure is higher than in the Secondary Trade Area or the City of Hamilton. There are a high proportion of single residents but also those who are separated, divorced, or widowed, which contributes further to the high proportion of single households. This results in a continual flow of new residents coming to the Locke Street area. As other residents move out there is still an affinity for Locke Street and they continue to return. It should be noted that the ownership rate is rising and there are two realty firms located on Locke Street.

| Housing Status | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|----------------|--------------------|----------------------|------------------|
| Own | 29.9% | 57.9% | 65.3% |
| Rent | 70.1% | 42.1% | 34.7% |

Source: Statistics Canada, Environics

| Household Size | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|-----------------------|--------------------|----------------------|------------------|
| 1 | 56.1% | 32.2% | 26.5% |
| 2 | 27.4% | 31.0% | 30.9% |
| 3 | 8.3% | 14.5% | 16.1% |
| 4 to 5 | 7.7% | 19.8% | 23.4% |
| 6+ | 0.5% | 2.5% | 3.1% |
| Persons Per Household | 1.7 | 2.3 | 2.5 |

Source: Statistics Canada, Environics

| Marital Status | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|------------------------------|--------------------|----------------------|------------------|
| Single | 35.2% | 29.0% | 26.0% |
| Married, Common Law | 41.7% | 53.2% | 56.6% |
| Separated, Divorced, Widowed | 23.1% | 17.8% | 17.4% |

Source: Statistics Canada, Environics

Education, Occupation, and Household Income

Primary Trade Area residents are well educated. This includes a combination of both working adults and Mohawk and McMaster students. While roughly equal proportions of residents work in the top populated occupations of sales/service and finance, insurance, and administration, a higher proportion of residents work in government, quasi-government, and non-profit occupations (e.g., health, education, government, faith, and social services), as well as management, sciences, arts, culture, recreation, and sport. Comparatively fewer residents work in manufacturing and utilities, trades and transport, and primary industries. There are a high proportion of residents in creative class occupations.

However, despite the well educated resident population and white collar resident occupations, household income is lower than elsewhere. Average household income is approximately 22% less than that of the City of Hamilton. The large number of elderly seniors may detract from some of the household income expenditure potential.

| Education | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|------------------------------------|--------------------|----------------------|------------------|
| Less than High school | 21.1% | 25.8% | 29.9% |
| High school Graduate | 8.9% | 12.0% | 14.4% |
| Technical or College Degree, Cert. | 32.1% | 33.4% | 35.3% |
| University | 38.0% | 28.7% | 20.4% |

Source: Statistics Canada, Environics

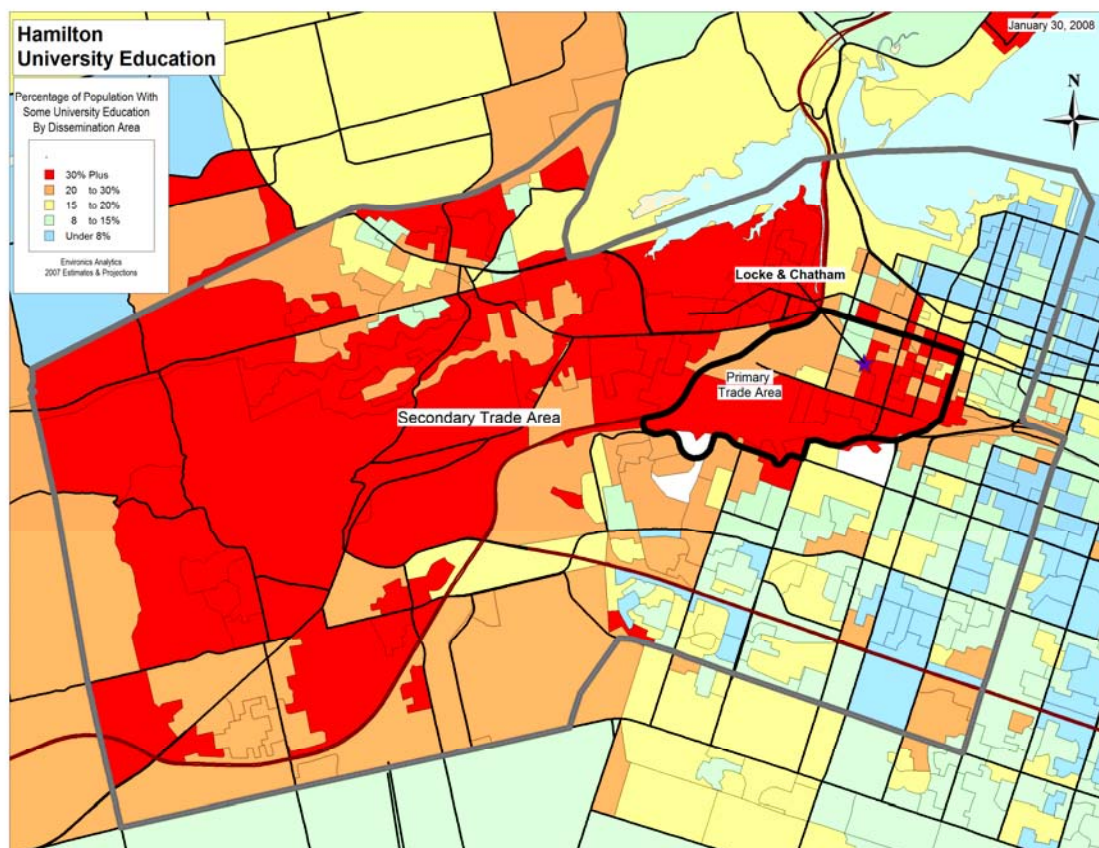
| Occupation | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|--------------------------------------|--------------------|----------------------|------------------|
| Sales/Services | 20.6% | 22.8% | 23.4% |
| Finance, Insurance, Admin. | 15.2% | 15.6% | 15.8% |
| Education, Government, Faith, Social | 15.1% | 11.0% | 7.6% |
| Management | 10.4% | 9.5% | 9.2% |
| Trades, Transport | 10.3% | 13.2% | 17.2% |
| Health Profession | 8.4% | 7.7% | 6.2% |
| Natural and Applied Science | 7.0% | 6.6% | 5.3% |
| Manufacturing, Utilities | 5.9% | 6.9% | 9.3% |
| Art, Culture, Recreation, Sport | 4.8% | 2.8% | 2.1% |
| Primary Industry | 0.7% | 1.6% | 2.1% |

Source: Statistics Canada, Environics

| Household Income | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|--------------------------|--------------------|----------------------|------------------|
| Under \$10,000 | 9.6% | 6.7% | 5.7% |
| \$10,000 to \$19,999 | 16.7% | 11.5% | 10.6% |
| \$20,000 to \$39,999 | 23.8% | 19.5% | 19.2% |
| \$40,000 to \$59,999 | 18.5% | 16.7% | 17.2% |
| \$60,000 to \$79,999 | 13.3% | 14.0% | 15.3% |
| \$80,000 to \$99,999 | 6.6% | 10.8% | 11.9% |
| \$100,000+ | 12.6% | 20.9% | 20.0% |
| Average Household Income | \$52,490 | \$66,108 | \$66,507 |

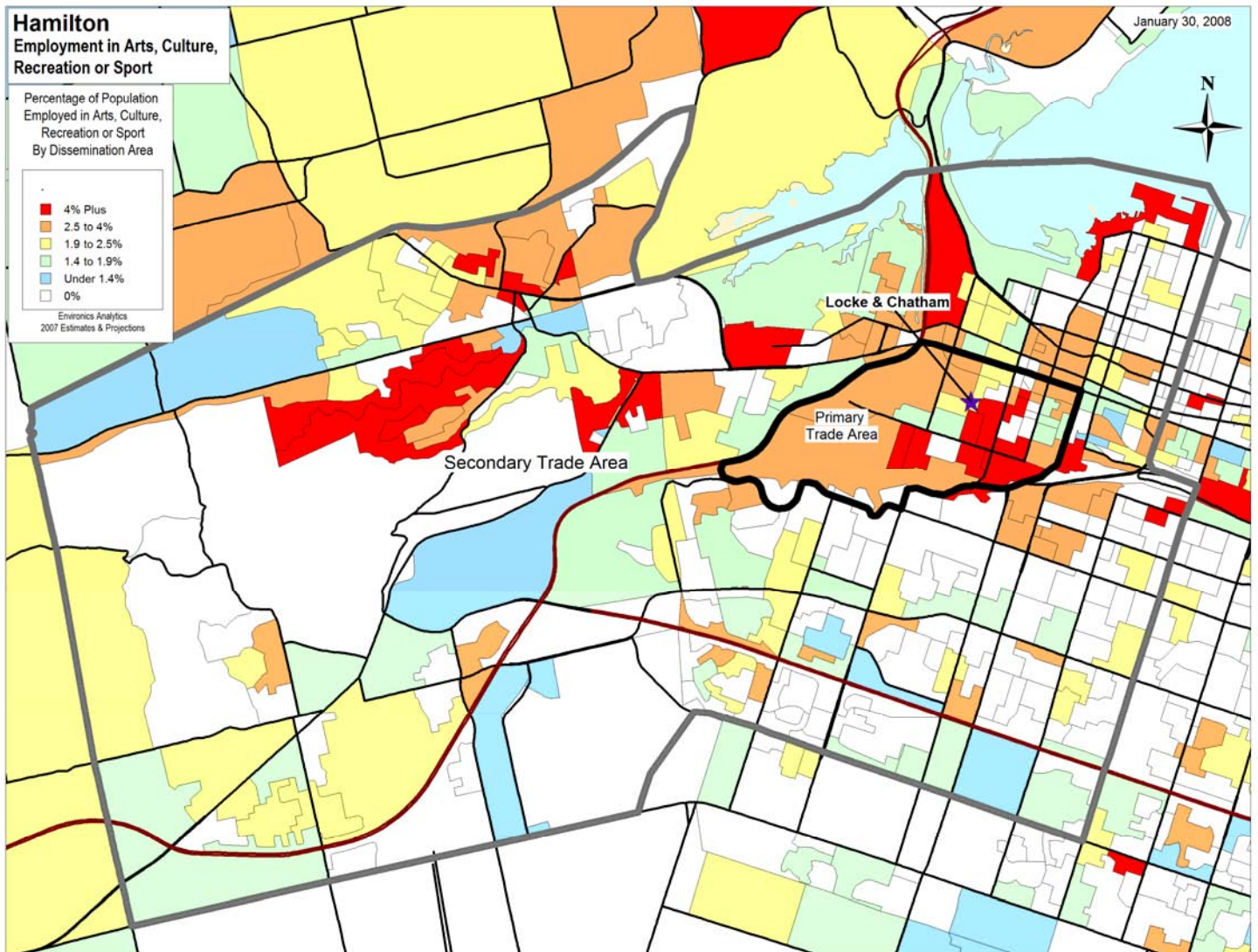
Source: Statistics Canada, Environics

The following map illustrates the high proportion of university educated residents in West Hamilton and the surrounding Locke Street South area.



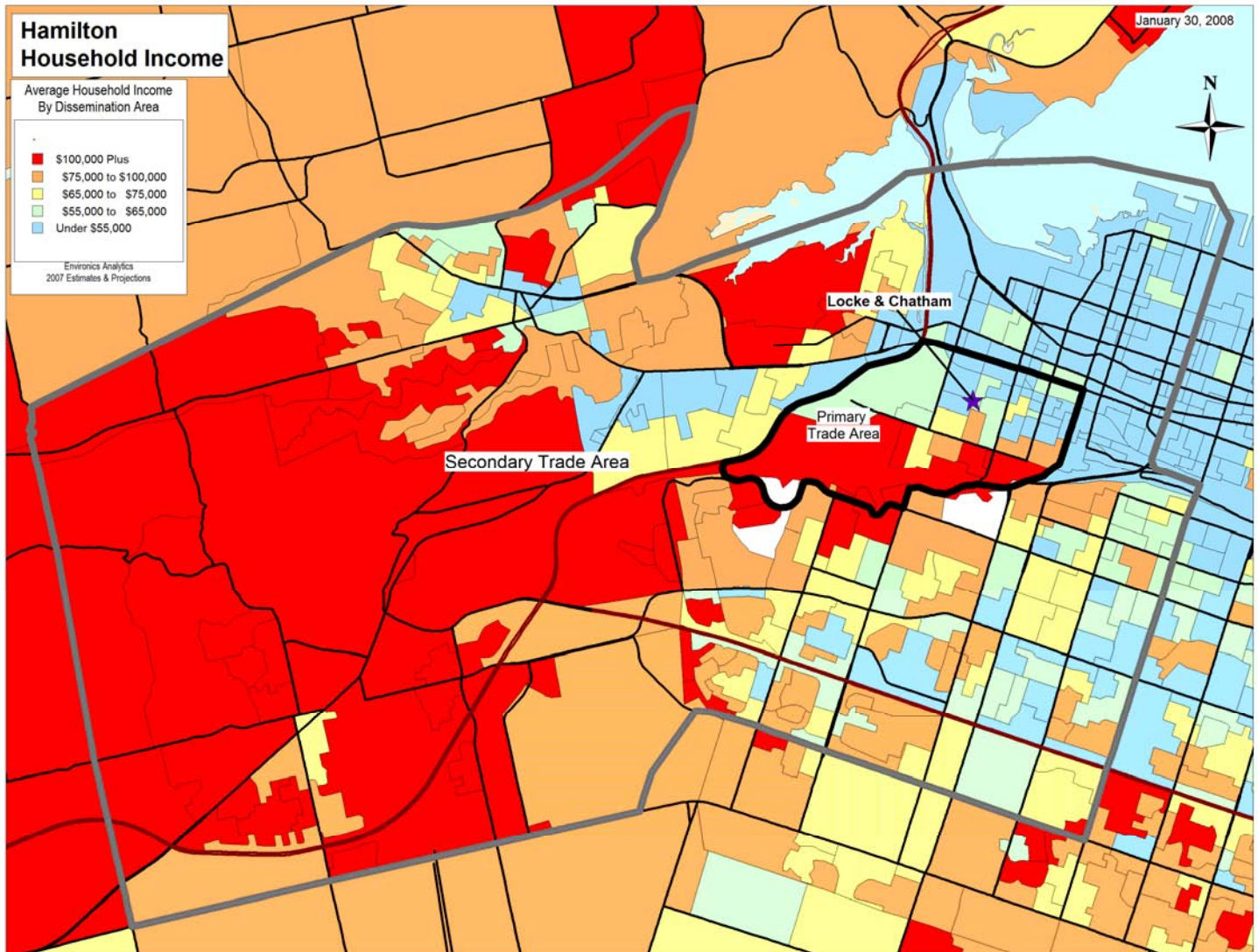
Source: Statistics Canada, Environics

The following map illustrates the high degree of residents employed in arts, culture, sport, and recreation, particularly in the Locke Street South area.

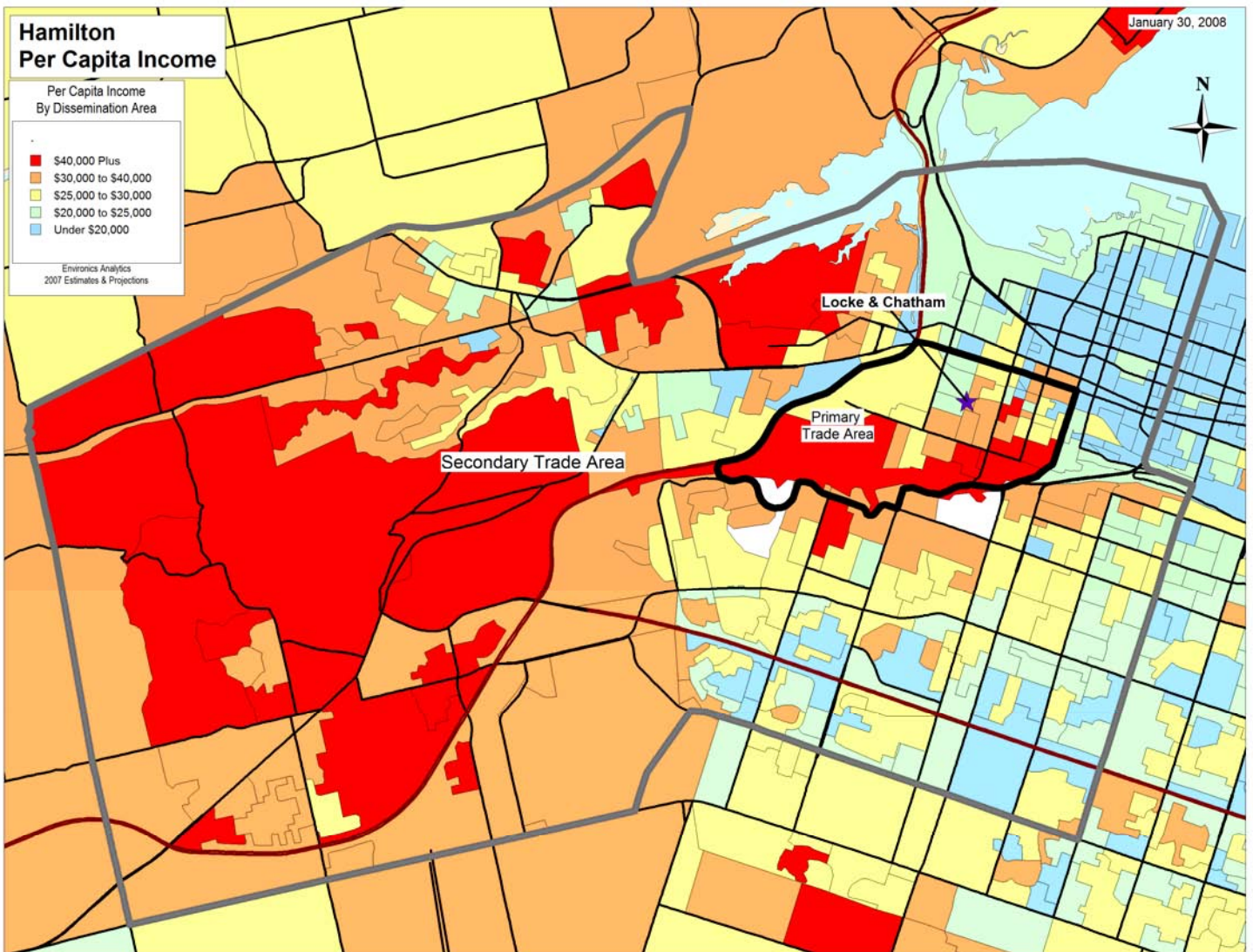


Source: Statistics Canada, Environics

The following maps illustrate both average household income and per capita income. Per capita income is a better illustration of the built-in nearby high demand for goods and services.



Source: Statistics Canada, Environics



Source: Statistics Canada, Environics

2.4 *Consumer Expenditure and Attitude Analysis*

The estimates of consumer spending by major category for the delineated trade areas are derived from the combination of (a) an analysis of income characteristics, and (b) an analysis of consumer expenditure and lifestyle information as determined by Statistics Canada and Environics².

The amount of consumer spending is a function of many influencing factors such as income, family size, and age. Of all the influencing factors, income is the most important because the more money people make, the more able and likely they are to spend. While the relationship between income and expenditures is strong, it is not a directly proportional relationship. As incomes rise (in real terms), a greater share of the income is spent on services, vacations, investments, and other non-consumable items. In addition, lifestyle plays an important factor because urban dwellers tend to spend more on eating out and less on larger family purchases such as large entertainment units, garden supplies, and large furnishings.

The table on the following page provides a breakdown of major spending categories and selected shopping behaviour that relates to pinpointing those residents that would demand products and services from a well functioning eclectic urban neighbourhood retail area. Expenditure and behaviour information on a per capita basis for the trade areas are shown. They do not represent sales to Locke Street South retailers but potential sales from the residents that are spent throughout the City and region.

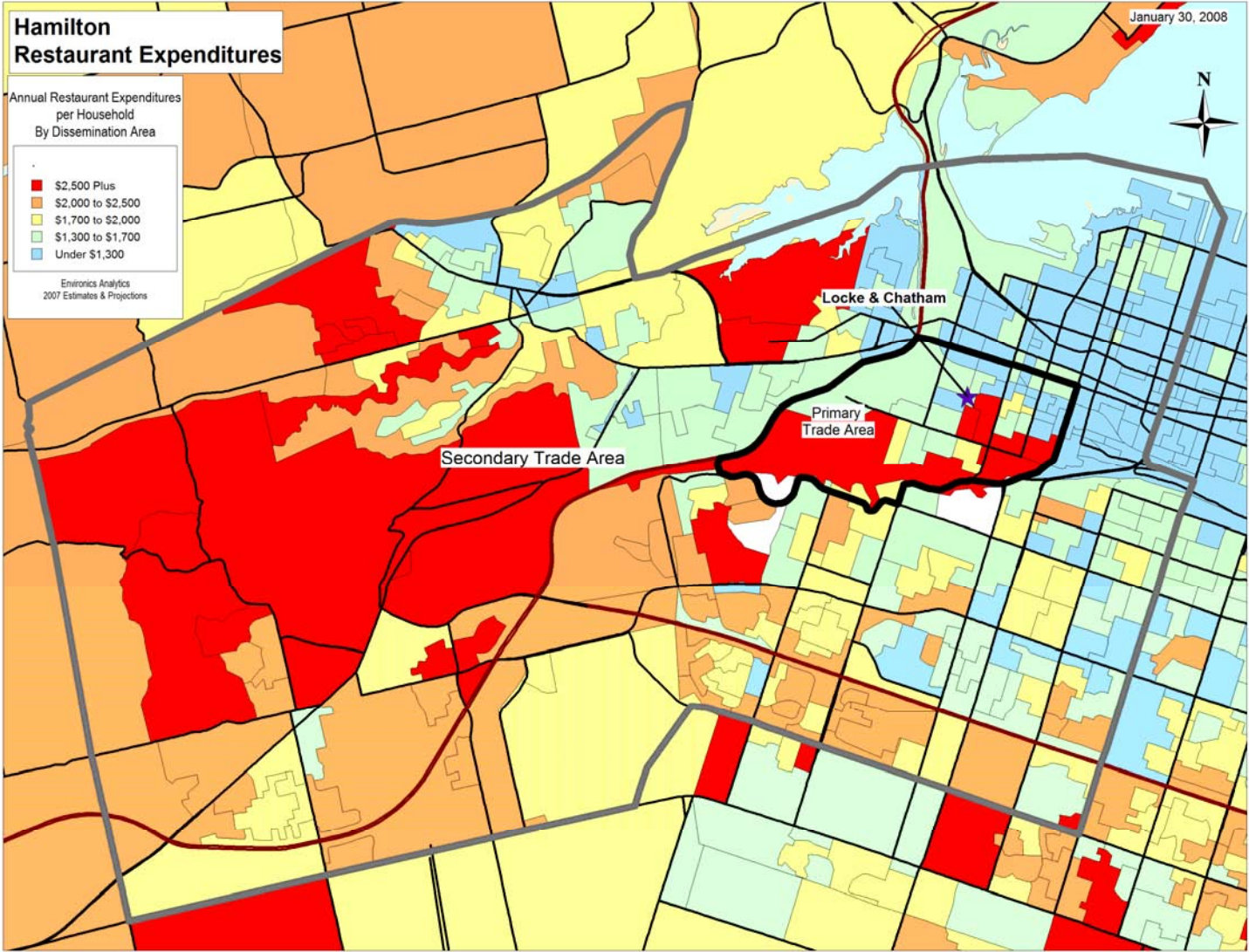
Generally, the expenditure statistics highlight the fact that average household incomes are less in the Primary Trade Area than elsewhere in the region but that because household sizes are smaller, the per capita expenditure is much higher for eating and drinking and other leisure related retail activities. This information is extremely useful to retailers in evaluating market viability.

² Environics updates consumer expenditure information from Statistics Canada and makes it available to UMC based on defined geographic trade areas.

| Annual Per Capita Expenditure | Primary Trade Area | Secondary Trade Area | City of Hamilton |
|---|--------------------|----------------------|------------------|
| Food and Beverage, Convenience | \$2,516 | \$2,321 | \$2,236 |
| Alcohol Purchased at Stores (e.g., LCBO, Beer Store, Wine Rack) | \$251 | \$214 | \$210 |
| Tobacco | \$358 | \$301 | \$308 |
| Health Care | \$524 | \$436 | \$416 |
| Home Furnishings | \$391 | \$386 | \$364 |
| Household Equipment | \$320 | \$332 | \$336 |
| Leisure | \$297 | \$203 | \$174 |
| Clothing and Accessories | \$1,222 | \$1,090 | \$1,023 |
| Reading and Education | \$232 | \$197 | \$183 |
| Garden Equipment and Supplies | \$105 | \$110 | \$110 |
| Restaurants | \$819 | \$659 | \$628 |
| Alcohol Served at Licensed Premises | \$153 | \$103 | \$92 |
| Personal Services | \$218 | \$190 | \$178 |
| Entertainment | \$395 | \$346 | \$324 |

Source: Statistics Canada, Environics

The following map illustrates household expenditure on restaurants. It shows the relatively high expenditure by West Hamilton residents and, in particular, surrounding Locke Street South that is a potential source of revenue for retailers.



Source: Statistics Canada, Environics

2.5 Consumer Survey – General Overview

Background and Methodology

Based on the trade area analysis, a telephone survey was conducted of 200 residents in the Secondary Trade Area. This included both ‘Visitors’ (visited Locke Street South within the past six months) and ‘Non-Visitors’ (have not visited Locke Street South within the past six months). Furthermore, 100 visitors were intercepted along Locke Street BIA and surveyed (‘Intercept’).

These surveys were undertaken as part of the research required, to understand the consumer market situation, including Locke Street South’s strengths, weaknesses, opportunities, and threats as it relates to developing a stronger commercial retail core. The Telephone Survey examines the behaviour of a wider cross-section of regional residents who primarily visit Locke Street for shopping and entertainment on an occasional basis. The Intercept survey examines the behaviour of those who visit Locke Street on a much frequent basis.

Market Penetration

Of the total household population of 81,206 in the Secondary Trade Area, 56% had visited Locke Street South in the past six months. This is equivalent to 45,475 households. The Primary Trade Area contains 12,378 households, of which 96% had visited in the last six months. This is equivalent to 11,883 households. (Note that the Secondary Trade Area includes the Primary Trade Area). The market penetration of Locke Street South excluding the Primary Trade Area is 50%.

By comparison, market penetration for other districts from previous studies conducted by UMC in 2002 and 2003 include:

| Hamilton BIA | Market Penetration | Reference Area |
|---------------------------|--------------------|---------------------------------|
| International Village BIA | 28% | 172,888 in Secondary Trade Area |
| Westdale Village BIA | 36% | 243,350 in Secondary Trade Area |
| Downtown Dundas BIA | 41% | 263,439 in Secondary Trade Area |
| Concession Street BIA | 70% | 48,054 in Primary Trade Area |
| Downtown Stoney Creek BIA | 79% | 27,415 in Primary Trade Area |

Source: Canadian Viewpoint, UMC

Respondent Profiles

Before proceeding to analyze the survey results, it is important to understand the way in which the profile of the various survey respondents differ from one another, and from the population of the Secondary Trade Area. Differences in demographic characteristics offer important insights that can help explain survey results.

| Demographic | Visitor | Non-Visitor | Intercept | Secondary Trade Area |
|-------------------------------|---------|-------------|-----------|----------------------|
| Base Population | 112 | 88 | 100 | 194,378 |
| Gender | | | | |
| Male | 38.4% | 31.8% | 34.0% | 49.1% |
| Female | 61.6% | 68.2% | 66.0% | 50.9% |
| Age Profile | | | | |
| 16 to 24 | 4.5% | 12.5% | 26.0% | 17.3% |
| 25 to 34 | 15.2% | 10.2% | 25.0% | 16.5% |
| 35 to 44 | 24.1% | 25.0% | 19.0% | 16.4% |
| 45 to 54 | 19.6% | 18.2% | 16.0% | 18.3% |
| 55 to 64 | 21.4% | 11.4% | 10.0% | 13.0% |
| 65+ | 15.2% | 22.7% | 4.0% | 18.5% |
| Educational Attainment | | | | |
| Some high school or less | 3.6% | 5.7% | 9.0% | 25.8% |
| High school graduate | 9.8% | 29.5% | 18.0% | 12.0% |
| Some college | 14.3% | 15.9% | 21.0% | 33.4% |
| College graduate or more | 71.4% | 43.2% | 53.0% | 28.7% |
| Children at Home | | | | |
| Yes | 33.0% | 35.2% | 41.0% | n/a |
| No | 67.0% | 64.8% | 59.0% | n/a |
| Household Income | | | | |
| Under \$20,000 | 7.2% | 15.2% | 7.0% | 16.3% |
| \$20,000 to \$39,999 | 13.0% | 21.7% | 11.0% | 19.2% |
| \$40,000 to \$59,999 | 18.8% | 19.6% | 24.0% | 17.2% |
| \$60,000 to \$79,999 | 15.9% | 28.3% | 20.0% | 15.3% |
| \$80,000 to \$99,999 | 13.0% | 4.3% | 12.0% | 11.9% |
| \$100,000 or more | 31.9% | 10.9% | 13.0% | 20.0% |

| Demographic | Visitor | Non-Visitor | Intercept | Secondary Trade Area |
|---------------------------------------|---------|-------------|-----------|----------------------|
| Base Population | 112 | 88 | 100 | 194,378 |
| Occupation | | | | |
| Professional, managerial | 29.5% | 17.0% | 26.0% | n/a |
| Retired | 23.2% | 28.4% | 5.0% | n/a |
| Other | 9.6% | 11.3% | 1.0% | n/a |
| Health related | 7.1% | 2.3% | 0.0% | n/a |
| Sales and service | 6.3% | 8.0% | 17.0% | n/a |
| Student | 6.3% | 6.8% | 14.0% | n/a |
| Clerical, administrative | 5.4% | 3.4% | 14.0% | n/a |
| Construction, factory, transportation | 4.5% | 2.3% | 5.0% | n/a |
| Homemaker | 4.5% | 12.5% | 8.0% | n/a |
| Arts, culture, recreation, sport | 1.8% | 2.3% | 4.0% | n/a |
| Not working | 1.8% | 3.4% | 1.0% | n/a |
| Skilled manufacturing | 0.0% | 2.3% | 3.0% | n/a |
| Farming | 0.0% | 0.0% | 0.0% | n/a |

Source: Canadian Viewpoint, UMC

A summary of some of the most significant differences between the visitors, non-visitors and intercept respondents is provided below.

Locke Street South Visitors

- Females
- Mix of 25 to 64 year-olds – but a high proportion of 25 to 34 year
- Very well educated
- Middle-to-upper household income
- High proportion of professional/managerial and health-related professionals

Locke Street BIA Intercept

The profile of intercepted visitors was very similar to that of Locke Street South Visitors:

- Females
- Mix of 16 to 44 year-olds - Note that the Intercept Survey highlighted a younger profile for an average Locke Street shopper compared to the Telephone Survey³.
- Very well educated
- Middle household income (\$40-\$80,000 per year)
- High proportion of professional/managerial and also sale/service professionals

Non-visitor Telephone Survey

While Locke Street South attracts all types of demographic groups, those who have a higher probability of *not* visiting Locke Street South include a significant proportion of:

- respondents 25 to 34 years of age, as well as those over the age of 65
- lower-to-middle household incomes (Less than \$80,000 per year)
- retired and homemaker respondents

The main reasons residents do not visit Locke Street South include the following:

Primary Reason for Not Visiting Locke Street South

| Reason | Non-Visitor |
|---------------------------------|-------------|
| Too far away from me | 25.0% |
| Nothing there for me to do | 22.7% |
| Inconvenient to get to | 21.6% |
| Too busy | 10.2% |
| Elderly/ disabled | 10.2% |
| Poor selection of shops | 3.4% |
| Other stores are closer | 3.4% |
| Not enough parking | 3.4% |
| Better stores elsewhere | 3.4% |
| Too expensive | 1.1% |
| Safety and security | 1.1% |
| Inconvenient hours of operation | 1.1% |

What are the main reasons you have not visited Locke Street South recently?

³ Younger telephone respondents are more difficult to reach due to cell phone usage as the primary telecommunication device and household structure (living at home or living with friends).

Residents between 35 and 44 years of age who have a middle-to-lower household income are less likely to visit than similarly aged residents with middle-to-higher household incomes. Regionally, residents west of Locke Street and in the Downtown are more likely to visit than those on the Mountain and in Ancaster.

Improvements and related comments include:

Improvements to Locke Street South to Encourage Non-Visitors to Reconsider

| Reason | Visitors |
|----------------------------------|----------|
| Nothing | 52.3% |
| Improve parking situation | 9.1% |
| More stores | 6.8% |
| More marketing/advertising | 5.7% |
| Don't know | 5.7% |
| Create better walking atmosphere | 3.4% |

What changes could be made to Locke Street South to encourage you to go there more often?

Activities of Locke Street South Visitors

People who visit Locke Street South primarily come for shopping and eating-related activities. The primary reasons include:

Primary Reason for Visiting Locke Street South

| Reason | Visitor | Intercept |
|-------------------------|---------|-----------|
| Shopping | 49.1% | 20.0% |
| Restaurant dining | 9.8% | 7.0% |
| Light meal | 8.9% | 14.0% |
| Visit friends/family | 3.6% | 3.0% |
| Special event | 3.6% | 1.0% |
| Personal service | 3.6% | 7.0% |
| Beauty/barber | 2.7% | 7.0% |
| Professional service | 2.7% | 3.0% |
| Attend house of worship | 1.8% | 6.0% |
| Live there | 0.9% | 4.0% |
| Sightseeing | 0.9% | 1.0% |
| Bar | 0.9% | 2.0% |
| Money/financial | 0.9% | 2.0% |
| Fitness recreation | 0.9% | 3.0% |
| Grocery | 0.9% | 3.0% |
| Work | 0.9% | 4.0% |
| Art gallery | 0.9% | 3.0% |

The last time you visited Locke Street South, what was your primary reason for going?/ Primary reason for being on Locke Street today? (unaided)

The overall strength of Locke Street South is shopping and eating-related activities. Beauty salons and other services are also key attractors.

Total Reasons for Visiting Locke Street South

| Reason | Visitors | Intercept |
|----------------------|----------|-----------|
| Shopping | 72.3% | 49.0% |
| Restaurant dining | 36.6% | 12.0% |
| Light meal | 27.7% | 46.0% |
| Personal service | 9.8% | 13.0% |
| Special event | 8.0% | 1.0% |
| Visit friends/family | 7.1% | 14.0% |
| Professional service | 5.4% | 6.0% |
| Beauty/barber | 5.4% | 9.0% |
| House of worship | 5.4% | 6.0% |
| Art gallery | 4.5% | 8.0% |
| Work | 4.5% | 4.0% |
| Grocery | 2.7% | 8.0% |
| Fitness/recreation | 2.7% | 6.0% |
| Financial | 1.8% | 3.0% |
| Bar | 0.9% | 4.0% |
| Sightseeing | 0.9% | 2.0% |
| Live there | 0.9% | 12.0% |
| Passing through | 0.9% | 9.0% |
| Library | 0.9% | 0.0% |

Visitation

Visitation is split between frequent, average, and infrequent visitation amongst visitors. Approximately one-quarter visit once a week or more, a further 31% visit a little more than once a month, and a further 38% visit less than six times a year. As stated, the intercept survey respondents were more frequent visitors to Locke Street South. Of these respondents, younger to middle aged residents were most likely to visit the area several times a week.

Locke Street South Visitation

| | Visitors | Intercept |
|--|----------|-----------|
| Daily | 3.6% | 15.0% |
| Two times a week or more | 5.4% | 22.0% |
| Once a week | 16.1% | 21.0% |
| Less than once a week but more than once a month | 8.0% | 21.0% |
| Once a month | 23.2% | 7.0% |
| Less than once a month | 6.3% | 6.0% |
| Two to six times per year | 31.3% | 4.0% |
| Less than twice per year | 1.8% | 0.0% |
| First time | 4.5% | 4.0% |

How often do you come to Locke Street South?

Intercept respondents also frequent Locke Street South more in the evenings, compared to a very low visitation rate by the Visitors group. During weekends however, Locke Street South can be very busy.

With such high visitation, loyalty type programs such as coupons and cross promotions will work very well as encouraging increased expenditure.

Locke Street South Evening Visitation

| | Visitors | Intercept |
|--|-----------------|------------------|
| Daily | 0.9% | 6.0% |
| Two times a week or more | 0.0% | 10.0% |
| Once a week | 4.5% | 13.0% |
| Less than once a week but more than once a month | 3.6% | 15.0% |
| Once a month | 8.9% | 4.0% |
| Less than once a month | 3.6% | 7.0% |
| Two to six times per year | 16.1% | 7.0% |
| Less than twice per year | 10.7% | 8.0% |
| Never | 50.0% | 27.0% |

How often do you visit Locke Street South on evenings?

Weekend Visitation to Locke Street South

| | Visitors | Intercept |
|---|-----------------|------------------|
| Two times per weekend or more | 0.9% | 11.0% |
| Once per weekend | 13.4% | 21.0% |
| Less than once per weekend but more than once a month | 6.3% | 19.0% |
| Once a month | 10.7% | 15.0% |
| Less than once a month | 9.8% | 10.0% |
| Two to six times per year | 25.0% | 10.0% |
| Less than twice per year | 12.5% | 2.0% |
| Never | 18.8% | 11.0% |

How often do you visit Locke Street South on weekends?

Given that there are only 76 retail businesses in the area, it is not surprising that the length of visitation is relatively short. It was mentioned by non-visitors that there was a lack of stores in the area. Not only do intercept respondents visit more frequently they also tend to stay longer. Clearly, people like to come to Locke Street purely to socialize. It will be critical that Locke Street businesses advocate for 2 hour parking given that the majority of visitors tend to stay that long.

Length of Visitation

| | Visitors | Intercept |
|--------------------|----------|-----------|
| Less than one hour | 33.0% | 25.0% |
| One to two hours | 47.3% | 42.0% |
| Two to four hours | 15.2% | 28.0% |
| Four or more hours | 4.5% | 6.0% |

When you come to Locke Street South, how long do you stay on average?

Transportation and Parking

A large percentage of visitors drive to Locke Street South; however, for Primary Trade Area residents, walking to Locke Street South is a method used by a significant number of visitors (16%). This is also reflected by intercept respondents who walk to Locke Street (41%). This is especially true for younger residents. This point adds to Locke Street South's strength as an accessible, local neighbourhood location. Public Transportation is not well used by Locke Street South visitors.

Method of Transportation

| | Visitors | Intercept |
|-----------------------|----------|-----------|
| Car/motor vehicle | 75.9% | 41.0% |
| Walk | 16.1% | 41.0% |
| Public transportation | 5.4% | 11.0% |
| Bicycle | 0.9% | 5.0% |
| Other | 1.8% | 2.0% |

For your most recent visit, how did you travel to Locke Street South?

Note, Locke Street is served directly and indirectly by the following bus routes:

- 7 – runs along Locke Street South from Main Street West to Chatham/Charlton
- 6 – runs along Aberdeen Avenue
- 1, 5, 5A, 5E, 10, and 51 – run along Main Street West
- 34 and 34A – run along Queen Street South

Parking Location

Visitors who drive to Locke Street South primarily choose to park on-street. There are limited business parking opportunities, but there is no municipal or private parking lot in the area.

| | Visitors | Intercept |
|----------------------|----------|-----------|
| On-street | 81.2% | 85.0% |
| Business parking lot | 12.9% | 10.0% |
| Surface parking lot | 3.5% | 2.0% |
| Elsewhere | 2.4% | 2.0% |

Where did you park?

Advertising and Promotion Recall

Newspaper articles and business-specific advertising are the most recalled advertising and promotion items for Locke Street South. The recent postcard campaign was recalled by 15% of Secondary Trade Area residents, 30% of Primary Trade Area residents. It is important to note that not all Secondary Trade Area residents had received the postcard. Intercept respondents recall of the postcard campaign was modest at 9% overall.

Advertising and promotion recall among non-visitors is significantly lower.

Overall, public relations is among the top methods of reaching potential visitors.

Advertising and Promotion Recall

| | Visitors | Non-Visitors | Intercept |
|-------------------------------|----------|--------------|-----------|
| Newspaper articles | 50.0% | 33.0% | 43.0% |
| Business specific advertising | 43.8% | 20.5% | 36.0% |
| Postcard from Locke Street | 15.2% | 3.4% | 9.0% |
| Website information | 8.9% | 1.1% | 21.0% |
| No recall | 27.7% | 61.4% | 40.0% |

In terms of advertising and promotions for Locke Street BIA, do you recall any of the following?

In terms of the overall images that Locke Street South provides for visitors and non-visitors, its antiques and trendy characteristics are at the forefront. However, images of an intimate, very welcoming and relaxing escape are also important attributes.

Image of Locke Street South

| | Visitors | Non-Visitors |
|---|----------|--------------|
| Trendy | 11.6% | 4.5% |
| Antiques | 9.8% | 9.1% |
| Friendly, pleasant, welcoming, social, approachable | 8.9% | 3.4% |
| Quaint (or trying to be so) | 8.0% | 5.7% |
| Nice | 8.0% | 5.7% |
| Improving, getting better, up and coming | 7.1% | 3.4% |
| Unique, different | 5.4% | 5.7% |
| Cozy, comfortable, homey, relaxing, casual | 5.4% | 4.5% |
| Fabulous, great | 5.4% | 2.3% |
| Eclectic, unusual | 5.4% | 1.1% |
| Fun, upbeat, alive | 5.4% | 0.0% |
| Village-like, small town – not City | 4.5% | 3.4% |
| Variety, diverse | 4.5% | 0.0% |
| Interesting | 3.6% | 5.7% |
| Artsy area, funky | 3.6% | 2.3% |
| Intimate, smallish stores | 3.6% | 0.0% |
| Shopping | 2.7% | 3.4% |
| Old fashioned, heritage | 2.7% | 2.3% |
| High-end, upscale, expensive, classy | 2.7% | 2.3% |
| Convenient, good location | 2.7% | 1.1% |
| Pedestrian area, walkable | 2.7% | 0.0% |
| Busy, crowded, no parking | 1.8% | 2.3% |
| Okay | 1.8% | 2.3% |
| Family, family oriented | 1.8% | 1.1% |
| Empty, isolated, out of the way | 1.8% | 1.1% |
| Bleak, shabby | 1.8% | 1.1% |
| Boutiques | 0.9% | 1.1% |
| Cleaned up | 0.9% | 1.1% |

What one word or group of words best describes Locke Street South?

Strengths and Weaknesses

Locke Street South received a relatively good rating of 3.88 out of 5.00 from the visitor survey and a very positive review of 4.37 out of 5.00 from the intercept survey. The most important factors visitors use to determine where they go to shop or eat include the quality of the restaurants and stores, safety and security, clean and up-to-date businesses, helpful staff, and easy to reach the area. These factors were of greater importance to older residents and female residents.

Locke Street's top ratings included easy to reach, ability to socialize and meet friends, safety/security, helpful staff, unique businesses and quality of restaurants.

However, visitors believe that there is room for improvement. The top rated deficiency is convenient parking. In addition, visitors were most critical and believe there is room for improvement related to the quality of restaurants and stores, evening hours, selection of restaurants, cleanliness and general up-to-date nature, and the area's overall appearance.

Importance versus Locke Street South's Ratings – Gap Analysis - Visitors

| | Visitors | | |
|--|-------------------|---------------------|-------|
| | Importance Factor | Locke Street Rating | Gap |
| Quality of restaurants | 4.47 | 3.90 | -0.57 |
| Safe and secure feeling | 4.46 | 4.13 | -0.33 |
| Clean, up-to-date businesses | 4.40 | 3.88 | -0.52 |
| Helpful staff | 4.34 | 4.04 | -0.30 |
| Quality of stores | 4.30 | 3.89 | -0.41 |
| Appearance of the area, well cared for | 4.22 | 3.71 | -0.51 |
| Easy to get to | 4.19 | 4.21 | 0.02 |
| Convenient parking | 4.09 | 3.09 | -1.00 |
| Unique, one-of-a-kind businesses | 4.01 | 3.99 | -0.02 |
| Wide selection of stores | 4.00 | 3.67 | -0.33 |
| Cost of parking | 3.94 | 3.75 | -0.19 |
| Wide selection of restaurants | 3.72 | 3.37 | -0.35 |
| Ability to socialize and meet friends | 3.58 | 3.72 | 0.14 |
| Open in the evenings | 3.38 | 3.28 | -0.10 |
| Activities and special events | 3.08 | 3.24 | 0.16 |
| Locke Street South Overall Rating | | 3.88 | |

Importance versus Locke Street South's Ratings – Gap Analysis - Intercept

| | Intercept | | |
|--|-------------------|---------------------|-------|
| | Importance Factor | Locke Street Rating | Gap |
| Easy to get to | 4.73 | 4.36 | 0.37 |
| Quality of stores | 4.70 | 4.06 | 0.64 |
| Safe and secure feeling | 4.69 | 4.04 | 0.65 |
| Quality of restaurants | 4.65 | 4.03 | 0.62 |
| Helpful staff | 4.64 | 4.42 | 0.22 |
| Clean, up-to-date businesses | 4.61 | 4.02 | 0.59 |
| Appearance of the area, well cared for | 4.56 | 3.85 | 0.71 |
| Wide selection of stores | 4.48 | 3.58 | 0.9 |
| Unique, one-of-a-kind businesses | 4.42 | 4.32 | 0.1 |
| Wide selection of restaurants | 4.38 | 3.59 | 0.79 |
| Ability to socialize and meet friends | 4.37 | 4.43 | -0.06 |
| Open in the evenings | 4.35 | 3.49 | 0.86 |
| Convenient parking | 4.12 | 2.84 | 1.28 |
| Activities and special events | 4.09 | 3.54 | 0.55 |
| Cost of parking | 4.08 | 3.81 | 0.27 |
| Locke Street South Overall Rating | | 4.37 | |

More detailed responses with respect to likes, dislikes, and improvements for Locke Street South include the following:

Likes About Locke Street South

| | Visitors | Intercept |
|---|----------|-----------|
| Unique, different, one-of-a-kind | 23.2% | 14.0% |
| Specific stores mentioned | 21.5% | 27.0% |
| Variety and diversity | 17.9% | 8.0% |
| Convenient and accessible | 16.1% | 9.0% |
| Antique stores | 12.5% | 6.0% |
| Nice, leisure area to visit | 11.6% | 1.0% |
| Casual, laid back atmosphere | 9.8% | 13.0% |
| Comfortable, comfy, familiar | 9.8% | 7.0% |
| Friendly, pleasant, welcoming, inviting | 8.9% | 23.0% |
| Walk and window shop | 8.9% | 7.0% |
| Restaurants | 8.9% | 1.0% |
| Shopping | 8.0% | 8.0% |
| Small village feeling | 7.1% | 9.0% |
| Interesting | 5.4% | 1.0% |
| Old world atmosphere, historical | 4.5% | 2.0% |
| Cool place to hang out, trendy | 4.5% | 3.0% |
| Everything I need is there | 3.6% | 2.0% |
| Quaint | 3.6% | 5.0% |
| Downtown feeling | 3.6% | 0.0% |
| Clean | 3.6% | 4.0% |
| Part of a neighborhood | 2.7% | 6.0% |
| Mixture of people and stores | 2.7% | 0.0% |

What do you like best about Locke Street South?

Dislikes About Locke Street South

| | Visitors | Intercept |
|-------------------------------|----------|-----------|
| Availability of parking | 30.4% | 26.0% |
| Narrow range of stores | 17.0% | 17.0% |
| Looks scruffy, not well kept | 11.6% | 5.0% |
| Safety concerns | 4.5% | 0.0% |
| Overcrowded | 3.6% | 7.0% |
| Narrow sidewalks | 2.7% | 4.0% |
| Not enough evening activity | 2.7% | 1.0% |
| Consistent hours of operation | 1.8% | 5.0% |

What do you dislike about Locke Street South?

Stores and Services That Would Encourage Increased Visitation

| | Visitors | Intercept |
|--|----------|-----------|
| More restaurants, better quality restaurants, ethnic restaurants | 19.6% | 10.0% |
| More stores, better stores | 17.9% | 12.0% |
| Specialty food and eateries | 9.0% | 8.0% |
| Movie, entertainment venue | 6.3% | 3.0% |
| Women's apparel stores | 5.4% | 0.0% |
| Outdoor pubs and patio spaces | 4.5% | 1.0% |
| Other clothing stores | 4.5% | 7.0% |
| More entertainment | 4.5% | 5.0% |
| Grocery | 3.6% | 3.0% |
| Cafés | 3.6% | 6.0% |
| Starbucks | 2.7% | 1.0% |
| Bookstore | 2.7% | 16.0% |
| Outdoor pubs and patio spaces | 4.5% | 1.0% |

What other stores, restaurants, entertainment, or cultural amenities would bring you to Locke Street South more often?

It is interesting to note the difference between the two consumer survey groups and the high proportion of intercept respondents who indicated that they would like to see a bookstore. Clearly, those who are on Locke Street very frequently and who live in the area would value a book place whereas other visitors who come less often feel that perhaps their book buying needs are satisfied by other shopping centres.

Prefer to Shop

Specifically, intercept respondents were asked where they prefer to shop for various products and services. The following list summarizes the top shopping venues (and the number of categories, in which the venue ranked as one of the top three venues):

- Lime Ridge Mall (4); Locke St (4)
- Meadowlands (3)
- Westdale (2)
- Maple View (1), Downtown (1)

As intercept respondents mainly visited Locke Street for shopping on the day of the survey, it is understandable that Locke Street ranks amongst their top preferred retail venues. Shoppers seeking clothing, home furnishings and gifts tended to be middle-aged and female visitors. On the other hand, shoppers seeking dining and restaurant services tended to be middle aged and male residents, while younger and female residents tended to shop for beauty services on Locke Street.

| Clothing | Restaurant Dining | Home Furnishings | Beauty Services | Gifts |
|---------------------|----------------------|----------------------|---------------------|----------------------|
| Lime RM - 54% | Locke St. - 71% | Lime RM - 28% | Locke St. - 60% | Locke St. - 63% |
| Meadowlands - 35% | Westdale - 21% | Meadowlands - 18% | Lime RM - 14% | Lime RM - 34% |
| Locke St. - 23% | Meadowlands - 20% | Maple View - 10% | Westdale - 9% | Other Downtown - 16% |
| Westdale - 17% | Other Downtown - 18% | Locke St. - 5% | Meadowlands - 7% | Westdale - 12% |
| Maple View - 16% | Lime RM - 15% | Oakville - 4% | Other Downtown - 7% | Meadowlands - 11% |
| Jackson Sq. - 13% | Hess Village - 11% | Toronto - 4% | James St. N - 3% | Jackson Sq. - 9% |
| Burlington M. - 10% | Dundas - 10% | The Brick - 4% | Dundas - 2% | Maple View - 9% |
| Dundas - 9% | Ancaster - 6% | Dundas - 3% | Jackson Sq. - 2% | Dundas - 8% |
| Other Downtown - 7% | Dntwn Oakville - 5% | Burlington M. - 3% | Toronto - 2% | Burlington M. - 8% |
| Dntwn Oakville - 7% | Jackson Sq. - 4% | Burlington P.C. - 3% | | James St. N - 5% |
| James St. N - 6% | James St. N - 4% | Ancaster - 2% | | Hess Village - 5% |
| USA - 5% | Toronto - 4% | Other Downtown - 2% | | Centre Mall - 4% |
| Toronto - 4% | USA - 4% | Centre M. - 2% | | Burlington P.C. - 4% |

3.0 Retail/Commercial Audit

An audit of the existing retail/commercial businesses in Locke Street BIA as well as the rest of the retail commercial area was conducted during December 2007, in order to understand the current retail/commercial situation in the area. The area studied includes the Locke Street South corridor from Main Street West to Homewood Avenue and is comprised of all retail commercial uses and other ground-level land uses (such as apartment buildings), as well as other easily accessible retail spaces. Professional offices, houses of worship, libraries, schools and other buildings were noted for their number only and not their floor area.

In completing this inventory, the strengths and weaknesses of Locke Street South's business mix were identified. The following are the salient findings based on the retail audit:

- There are 18 retail commercial businesses within the BIA and a total of 76 along the retail corridor.
- There is a high proportion of retail merchandise within the BIA and the retail corridor. Approximately 45% of the businesses and 49% of the square footage is retail related. These figures are very high for most retail areas. For the retail corridor, retail merchandise accounts for 35% of the total square footage.
- Eating and drinking businesses account for 11% of the BIA. This is approximately equivalent to the retail corridor.
- There are limited food and beverage businesses within the BIA. Outside the BIA there are more, which account for 10% of the square footage.
- Vacancy is very low.

Locke Street South Commercial Audit – Number of Businesses and Square Footage

| | Locke Street BIA | | Total Locke Street | |
|-----------------------------------|------------------|---------------|--------------------|----------------|
| | Number | Sq. Ft. | Total | Sq. Ft. |
| Apparel | 0 | 0 | 3 | 3,400 |
| Leisure | 6 | 8,800 | 18 | 36,500 |
| Home Furnishings | 1 | 1,800 | 5 | 8,000 |
| Miscellaneous Retail | 1 | 2,000 | 2 | 5,000 |
| Eating and Drinking | 2 | 2,800 | 11 | 17,100 |
| Food and Beverage | 1 | 1,200 | 6 | 14,000 |
| Beauty | 3 | 4,000 | 13 | 20,800 |
| Other Personal Service | 0 | 0 | 4 | 4,600 |
| Financial, Insurance, Real Estate | 1 | 1,200 | 2 | 3,200 |
| Office / Professional | 1 | 1,000 | 7 | 25,000 |
| Automotive | 1 | 2,000 | 2 | 4,000 |
| Renovation | 1 | 1,000 | 2 | 3,000 |
| Vacant | 0 | 0 | 1 | 1,500 |
| Total | 18 | 25,800 | 76 | 146,100 |
| Other | | | | |
| Houses of Worship | 4 | | 4 | |
| Libraries | 1 | | 1 | |
| Schools | 1 | | 1 | |
| Residential Buildings | 20 | | 26 | |

Source: UMC, City of Hamilton

Locke Street South Commercial Audit — Percentage

| | Locke Street BIA | | Total Locke Street | |
|-----------------------------------|------------------|---------------|--------------------|---------------|
| | Number | Sq. Ft. | Total | Sq. Ft. |
| Apparel | 0.0% | 0.0% | 3.9% | 2.3% |
| Leisure | 33.3% | 34.1% | 23.7% | 25.0% |
| Home Furnishings | 5.6% | 7.0% | 6.6% | 5.5% |
| Miscellaneous Retail | 5.6% | 7.8% | 2.6% | 3.4% |
| Eating and Drinking | 11.1% | 10.9% | 14.5% | 11.7% |
| Food and Beverage | 5.6% | 4.7% | 7.9% | 9.6% |
| Beauty | 16.7% | 15.5% | 17.1% | 14.2% |
| Other Personal Service | 0.0% | 0.0% | 5.3% | 3.1% |
| Financial, Insurance, Real Estate | 5.6% | 4.7% | 2.6% | 2.2% |
| Office / Professional | 5.6% | 3.9% | 9.2% | 17.1% |
| Automotive | 5.6% | 7.8% | 2.6% | 2.7% |
| Renovation | 5.6% | 3.9% | 2.6% | 2.1% |
| Vacant | 0.0% | 0.0% | 1.3% | 1.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% |

Source: UMC

4.0 Strengths, Weaknesses, Opportunities, and Threats

Strengths

- Distinct Culture
 - Natural environment and the tight residential neighbourhood with houses of worship, library, and schools along the street to build off of
 - Left-leaning attitude
 - Highly educated professionals
 - Contemporary tastes
 - One of the preferred retail venues in the area
 - Somewhat immune to outside influences
 - Very walkable street
- Business Climate
 - Center of the neighbourhood – easy socialization
 - Population growth
 - Good population base of over 20,000 in the Primary Trade Area
 - Investment in housing
 - Critical mass in eating and drinking and antique/leisure for whole street
 - Newly formed BIA to take Locke Street marketing to the next level
 - Good market share of surrounding West Hamilton trade area of higher income professionals
 - High local business ownership and/or involvement

Weaknesses

- Visibility
 - Locke Street is slightly isolated from major roads (Main Street West and Aberdeen Street)
 - Street conditions are tired-looking
 - Poor visibility of merchants who are only accessible by steps (primarily the east side of the street)
 - Lack fo parking
- Perception vs. Reality
 - Image as an antique center – lack of appeal to some residents
- Business Retention
 - Decline in sales at antique stores in North America
 - Concern over too many bars entering the market
 - Rising rents may push independents out

Opportunities

- Managing growth – growth is happening in the area and need to ensure that Locke Street benefits.
- Locke Street BIA and City ready for the retention and recruitment challenge – have committees, staff, and resources to push these programs forward.
- Requires improved connections between opportunities and infrastructure – natural environment and Locke Street, arts and restaurants, parking and retailers, local residents and meeting/socialization spaces.
- Implementation will use many tools (e.g., working relationships, communication, retention, recruitment, incentives).
- Public investment must leverage private or other investments – look for partnerships.
- Opportunities include:
 - Appeal to locals – makes it easier for them to use Locke Street by offering variety of convenience goods and services and meeting/socialization spaces
 - Offer unique products and services (e.g., organics, fair trade coffee, custom furnishings), for which people are willing to pay more
 - Additional conversion of residential to commercial may add more retail space
 - Unique restaurants that build upon the existing strengths of Locke Street
 - Strategically place nationals (e.g., Starbucks) along Locke Street to encourage flow
 - Ensure parking is well signed and marketed (e.g., paint lines, signage on outside of building, coordinate with houses of worship to allow for commercial parking)
 - Marketing should be geared towards drawing people to “experience” Locke Street
 - Create synergy with arts and entertainment activities

Threats

- Other trendy retail areas are pursuing the same retailers and target markets.
- Other retail areas are offering more left-leaning retailers (green retail, fair trade, organics) – difficult to stay ahead of the curve.
- Any new development that is currently proposed, accepted, or under construction (such as Innovation Park at Aberdeen Avenue and Highway 403) may provide more competition especially for smaller sized retailers and restaurants that accompany the big box retailers
- Difficult to find a balance between independents and nationals – too many nationals affect the unique character attributes and create sameness to the local and regional malls.
- Required maintenance of the street will affect sales for existing retailers; this has to be taken into consideration.
- Too many organizations doing the same thing.

4.1 *Locke Street Realities – Entire Retail Corridor*

Challenge

- Manage the growth opportunities. As Locke Street retail gains momentum there is a continual shift in the retail activity. Locke Street, once the centre for antiques, has now begun to shift to leisure retail including art galleries and home furnishings. The next evolution includes more eating and drinking establishments. Two new coffee houses are set to open in the Winter/Spring of 2008 and there is pressure to add more restaurant space. The challenge will be to manage the growth that is happening in the surrounding neighbourhood and ensure that Locke Street moves in step with that growth. In addition, it is important to be mindful of growth opportunities and still retain the combination of independent neighbourhood and destination retailers.

Issues

- Locke Street's ability to grow and capture some convenience retail is limited due to accessibility and visibility issues.
- Recently destination type retailers have done well (antiques and appointment-based hair salons); now more convenience oriented retail has gained a stronger foothold on Locke Street.
- From a merchandising standpoint, destination retailers must be good in order to survive; mediocre retailers will not last.
- Rents are low enough to make it less risky to start up a new venture. However, they are sufficiently high to attract new development.
- Locke Street retailing cannot be typical. There is too much competition for traditional comparison shopping goods such as apparel. Unique, destination retailers such as Milli's are the exception.
- The different organizations are doing too little to effectively market Locke Street. In addition, the overall image of Locke Street as a shopping area is being affected by different organizations pushing in different directions. The result is consumer confusion.

Strengths to Build Off

- Attractive environment
- Large enough to provide enough stores for a shopping experience
- Growing population
- Attractive local demographics that about the Locke Street retailers (no barriers), as well as regional visitation
- Somewhat isolated community – immune to outside influences
- Visionary property owners – willing to take risks, committed to the area
- Centre for the neighbourhood of houses of residential, schools, houses of worship, library

Outcome

- Create a neighbourhood retail street for all to enjoy that will draw regional visitors to be part of the eclectic mix.

Options

- Improve retailer retention programs (parking, marketing, events, safety programs, parks)
- Search for independent retailers but strategically place nationals to create flow
- Create additional opportunities and flow by developing infill opportunities on soft sites (conversion of residential to retail)
- Search for more convenience goods in food and beverage stores, specialty food retailers, health care in small formats, unique positioning retailers
- Encourage more mixed-use development as appropriate
- Be prepared to offer rental deals to entice tenants to Locke Street

The focus must be on growing the demand side on a short-, mid-, and long-term basis:

- Intense, better income housing in and adjoining Locke Street
 - Retail concepts that will draw shoppers
 - More convenience based retail to satisfy local demand
 - Reach out to market niche segments:
 - Culture
 - Entertainment
 - Eating and drinking
 - Home and arts
- } Unique regional urban experience

5.0 Locke Street Retail Retention and Recruitment Action Plan

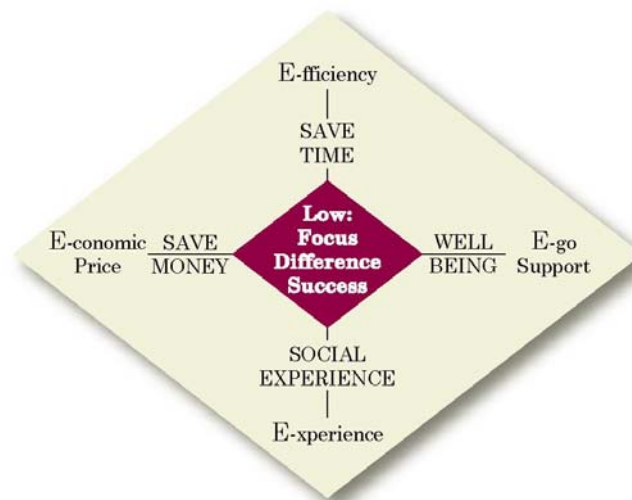
5.1 A Competitive Strategy for Locke Street

This section of the Action Plan Report focuses on a recommended market position for Locke Street, and then outlines a series of activities that will help retain current businesses and increase sales. Finally, this report suggests specific actions to facilitate attracting new retailers to Locke Street.

Choosing a Successful Strategy: The Four E's Model

It is critical that retail businesses, cities, urban cores, and specific districts have a clear strategic direction with which to focus their resources. Without an agreed-upon strategic focus, confusion reigns and no progress is made. Selecting a focus may cause some pain because it means giving up trying to be all things to all people and pleasing every store owner and landlord, and means saying “no” to some people. Without a goal and strategic direction, any road will do, whether or not it leads to success.

The Four E's Model gives Locke Street a series of four distinct options from which to choose. Based on the research and analysis in previous sections, you can then decide which direction to go. While business districts can be “good” at all of these, to start the revitalization process you have to commit to being “great” at one of them. In making this decision, be sure to build upon strengths.



Source: J.C. Williams Group

Choose from these four basic strategic options:

Efficiency

- An easy place to reach, shop in, and leave
- A place with great services and parking
- Example: Lime Ridge Mall

Economy

- An outlet town or manufacturer's warehouse district (e.g., Freeport, Maine)
- Wholesale district
- Examples: garment district, Los Angeles; Freeport, Maine, Ottawa Street BIA

Entertainment / Experience / Education

- A place to go that is great to visit
- Examples: Santa Fe; St. Jacob's; Westdale; Downtown Dundas; International Village; James Street North

Ego

- Status area or city (e.g., Palm Beach, NYC, Rodeo Drive)
- Examples: Palm Beach; Whistler; Bloor Street West, Toronto

The greater the critical mass around one theme or strategy, the greater the drawing power of a trade area. For Locke Street to obtain a high profile in people's minds, it will need numerous competing retailers, restaurants, and attractions, preferably slightly different from one another.

It is critical that there be strong consensus amongst all stakeholders on the entire street's role and target market segments. Without agreement on what Locke Street's overall position in the trade area should be and which consumer segments Locke Street will attract, there can be no concerted, efficient, and effective effort to achieve the vision. Nothing will be accomplished if development, city infrastructure, leasing, marketing and services are uncoordinated and travel in different directions.

Locke Street will not (and cannot) compete with the formidable assortment of mainstream stores, fast food, and convenience services in the suburbs.

Locke Street’s retail area will not be for everyone, but it will have both neighbourhood and region-wide appeal as a place that:

- builds off of its current “experience” strengths of home décor, antiques, and galleries, hair salons, food, and culture;
- builds and markets (a) the “ego” image of a “cool” place for contemporary, left-leaning, funky, enlightened urban sophisticates, and (b) an interesting mix of shops and services;
- develops its “efficiency” appeal derived from its central neighbourhood location, a parking management strategy, and convenience goods and services
- offers entrepreneurs an economical place to start a business;
- is a small village alternative to a visit to the Downtown or to sterile malls; and
- is an appealing place to live, especially for those people familiar with vibrant retail areas and cosmopolitan cities and wanting a walk-to environment.

5.2 Locke Street Market and Position

Locke Street will focus on three primary target market segments:

1. People wanting a more mature but fun, contemporary, urban experience as an alternative to a suburban mall or power center (i.e., people who appreciate a more contemporary and sophisticated experience). This includes local residents as well as regional visitors and potentially tourists.
2. Locke Street business users, workers, and professionals (i.e., working, visiting library, houses of worship, personal services, etc.).
3. Kirkendall and Durand residents.

Locke Street will be positioned as a neighbourhood retail street that draws regionally for those to enjoy a more contemporary and sophisticated experience. This includes food, entertainment, specialty shopping (primarily) for home and related commodities, professional services, and special events.

6.0 Strategy

Due to the relatively small nature of the Locke Street BIA and the Locke Street South retail corridor, each business is critical to supporting the overall vision. Locke Street is and should remain a highly focused niche player including basic neighbourhood goods and services combined with critical mass supplied by destination leisure retailers. The long-term success of Locke Street will be built upon a cohesive and integrated approach. The best model to move the process forward is the BIA business model. This is a well recognized program for Ontario, North American, and other western countries based upon all businesses cooperatively working together with support of all levels of governments.

6.1 Organizational Strategy

As stated above, the core principles of commercial revitalization is organizational strategy. Locke Street BIA needs to be commended for taking the “leap-of-faith” towards creating an effective BIA. While the BIA has started small and accounts for approximately one-quarter of the retail businesses on the street, the results have been noticeable and it has garnered support from other Locke Street South retailers and property owners who want to join. However, this sentiment is not universal.

The most appropriate expansion strategy for Locke Street BIA has been difficult to navigate. Most notably the BIA expansion is concerned about overlap and competing priorities with the Locke Street Business Association.

There are several expansion strategies including expansion on a block-by-block basis or an all-in-one approach. It is the opinion of UMC that the best expansion strategy would be to push for all or most of the retail corridor of Locke Street (all-in-one approach). This strategy will be time and resource effective. Currently, the Locke Street BIA has proposed three successive expansion plans. However, with each proposed expansion plan there are the following concerns:

- The BIA is only concerned with expanding and not moving the overall business plan forward fast enough.
- Each expansion requires a socialization process of bringing the new businesses up-to-date with the vision and the contemporary business and marketing plans agreed upon. The new members will have a different vision and concept of how to move forward. This process will have to be re-iterated several times with each expansion. The greatest risk is that the new members will not agree with the business marketing plans proposed.

- There could be a situation whereby the BIA founding members view themselves as different from the new members (old guard versus new guard) – especially when comparing themselves to the Locke Street Business Association members. This may create a sentiment of non-cooperation.

However, UMC does acknowledge that there is risk involved in one big expansion. Should there be sufficient opposition to the BIA, it will be difficult to repeat the expansion at a later date. This will create a problem because the current BIA will be too small and ineffective to promote the whole retail district. This is why it is critical for there to be open communication between the BIA and other property owners and businesses along Locke Street. This open dialogue will help to ease tensions. There needs to be a neutral body that can help mediate and bring the street together cohesively.

Locke Street BIA must develop support that is both broad and deep among the prospective members. These changes to Locke Street BIA will probably push the retail district in different directions. Persistence and commitment are necessary from the current members and Board of Directors, helping ensure that there is carry-over to new members as BIA expands. Competency and leadership are also essential; the organization's leadership must have and must be perceived as having the requisite skills and ability to attract others to the cause. The current BIA must be able to develop and articulate a vision for Locke Street South that is compelling and realistic to future members.

Many Locke Street property owners and businesses may not see the benefit of the BIA, knowing that BIAs often form in response to crises (of course, there is no immediate crisis along Locke street). Sales for retailers are increasing and thus they may not see the benefit of a higher levy (compared to the business association dues). However, Locke Street retailers must see that the current fracture of too many organizations will harm the retail street in the long run. The consumer will become confused and disgruntled with Locke Street. As an example, consider that there are *three* websites for Locke Street retailers. Which website is the most valid and portrays the right image? The potential consumer wants one source of information. The BIA must carefully consider the resources that need to be put in place to assuage potential new members and convince them of the benefits of joining the BIA.

To assist in “selling” the BIA to members (over the business association), there are a number of benefits, including the following:

- BIAs free up the chair or executive director's time from fundraising activities so that the person can concentrate on substantive business planning issues.
- BIAs provide a stable, multi-year source of funding.

- BIAs require significant, demonstrated property-owner support when being organized; this means that property owners are likely to maintain interest and involvement over the long term.
- BIAs generally work hard to demonstrate and measure success and the services they provide can often be clearly measured (visitation, marketing recognition, etc.).
- BIAs provide a more equitable funding approach; all property owners within the district benefit and all pay the assessment. Voluntary contribution approaches are generally characterized by a few civic-minded firms making hefty contributions and many others getting a free ride.

It should be understood that BIAs are a funding mechanism, not a specific set of programs, although many BIAs do focus on “clean and safe” services. The emphasis on “clean and safe” is due to the following points:

- Making a business district clean and safe is basic. Property owners understand that tenants, shoppers, other customers, and visitors are unlikely to rent space or visit the district if it is (or is perceived to be) unsafe and unkempt.
- Some of the best and most publicized BIAs have concentrated heavily on “clean and safe” activities, particularly in the first few years.
- Beautification.

As stated, a BIA is not a panacea for Locke Street. It is a tool to help you achieve what you want. If the BIA wants to increase beautification on the street, landscape, and facades, then the BIA can work effectively with the City and property owners to develop a program of landscaping and grants to assist in property redevelopment.

The current chair of the Locke Street BIA has taken on a number of the administrative duties that are often carried out by paid staff. As the BIA expands and its budget grows, a real consideration will be whether to hire a staff person either as an executive director or executive assistant. An executive director would take over managing the business plan whereas an executive assistant would assist the Chair in delivering the business plan, logistics, communications, etc. For a small organization, the staff person must possess both general organizational skills and a certain level of technical skills and knowledge. Required of this person are people management and facilitation skills, in order to work with the different merchants and property owners, as well as an ability to communicate the stated goals effectively.

UMC’s recommendation is for the Locke Street BIA to expand to include the entire retail corridor. As a very small and fledgling BIA it will be important to establish a committee to work towards expansion plans including increased communication with non-

members. This will require assistance to move in this strategic direction. The long-term success of Locke Street will only come with this integrated approach.

Organizational Characteristics, Structure, and Resources

- The Locke Street BIA should develop into an organization similar to Downtown Dundas and Westdale. As stated, there may be varying ideas on whether there should be an executive assistant or an executive director. While these other organizations are well established and assume a wide range of responsibilities, the Locke Street BIA will need to be selective as it moves through the expansion process and develops programs. A concerted effort on easily achievable goals (low hanging fruit) should be a focus. Too much too soon will catapult the organization to failure as the weaknesses will overpower any planning efforts. The BIA organization must be seen as able to accomplish tasks and must set out achievable and relatively simple tasks. The marketing programs have been highly effective, but more emphasis on public relations will pay back tremendously. In addition, consumer surveys indicated that visitors thought Locke Street was “tired-looking.” Increased emphasis on façade improvements combined with a longer term strategy for landscaping and streetscaping is important. These are important selling features for the BIA expansion. The BIA must tell others what has been accomplished and what their plans are in moving forward.
- The new organization must have competent, energetic, and creative board members, and, eventually, staff members. Leading the revitalization of a business district is not a nine-to-five job. Furthermore, in a very small organization, the proposed staff must possess both general organizational skills and a certain level of technical skill and knowledge related to City services, real estate development, and marketing.
- The new organization must have the capacity to do things. Acting as an advocate for Locke Street South is very important, but not sufficient to accomplish the tasks at hand. At the same time, it should be recognized that the Locke Street BIA would not have sufficient resources to accomplish everything it sets out to do. It will have to establish partnerships and alliances with other organizations (especially with the City, the residents association, Locke Street Business Association, houses of worship, St. Joseph’s School, the library) to leverage its resources.
- The Locke Street BIA’s primary responsibility is to improve the local business climate through a combination of management, maintenance, and marketing. The BIA must play the roles of:
 - **Advocate** – As stated, being an advocate for Locke Street South businesses is important but it is only part of the roles and responsibilities. The BIA must ensure that Locke Street South’s interests are represented and advanced in policy

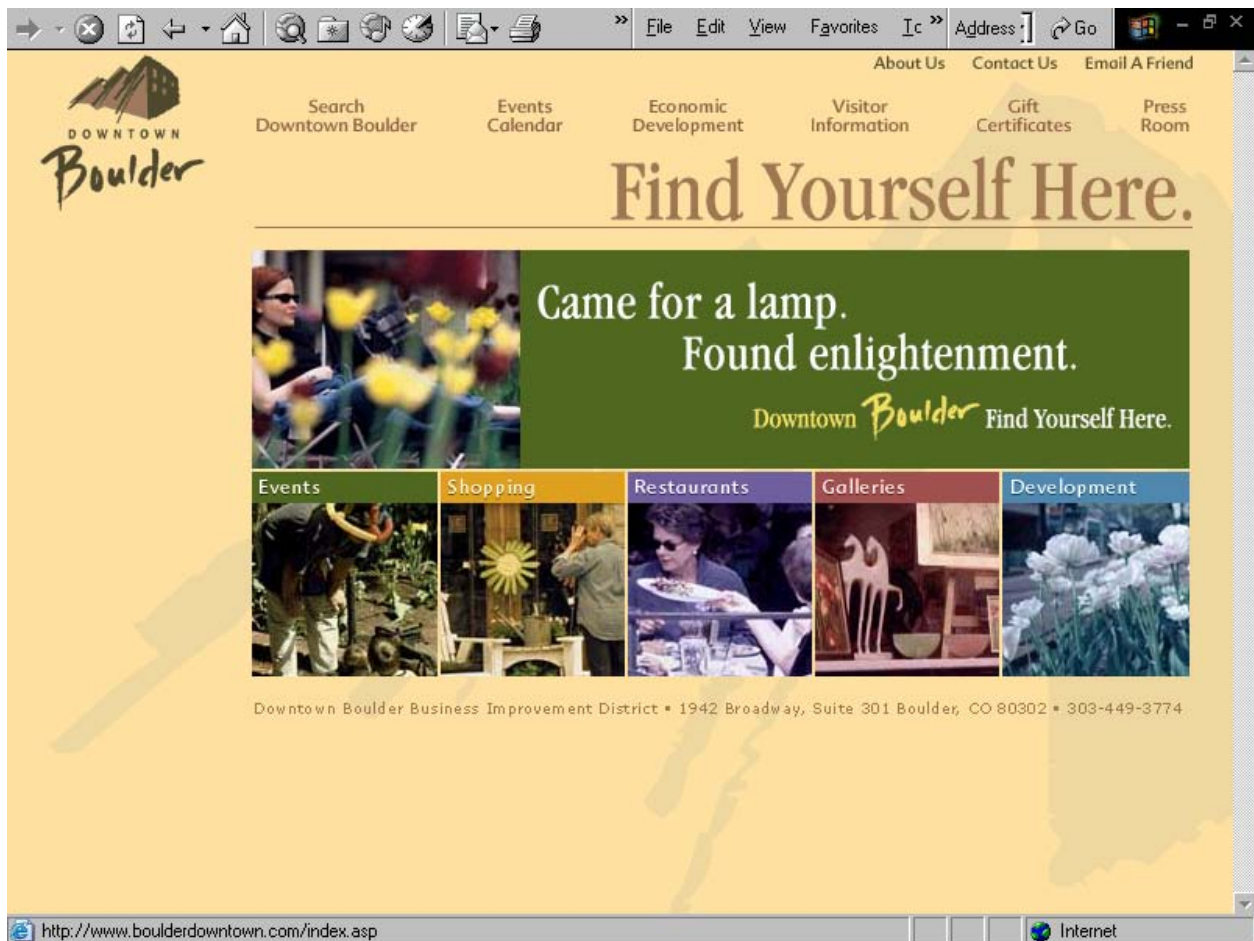
- and resource allocation decisions at the City and regional levels (including the provincial level). The organizational plan provides recommendations for improving communication with the objective of better informing, engaging, and mobilizing all local community interests.
- **Marketer** – With continued expansion, Locke Street BIA needs to solidify its role as the district’s primary marketer, aiming to develop a broader base of target markets to draw to the area. It will also oversee communication to attract investor markets to create new businesses, jobs, and investment.
 - **Facilitator** – Locke Street BIA can play a strong role as facilitator or “deal maker” to encourage new types of marketable real estate investment. In addition, it may also take a more aggressive position on the real estate delivery system (e.g., ease of using incentive programs; beautification projects, permits, retail recruitment, etc.). This role will take some time to develop given the higher priority for other tasks and the skill that is involved.

Communication

Communications programs are intended to better inform and educate all Locke Street South stakeholders (including BIA members and non-members) on issues, challenges, and opportunities affecting the area. To fulfill the Locke Street BIA’s role as the advocate, promoter, and facilitator of new investments, the following program initiatives are recommended:

- **Bi-weekly fax or e-mail:** increasing the frequency of communication will provide timely updates on Locke Street South issues and activities. The fax/e-mail is targeted to the primary Locke Street BIA retailers, property owners, and other stakeholders.
- **Website:** develop a Locke Street South Website to build both internal communications and external marketing (there are two other websites at present – one that is active and another that appears to not be up-to-date), in addition to the one being developed by Locke Street BIA.

An example of an effective Website produced by Downtown Boulder:



- **Quarterly/bi-annual newsletter:** a quarterly or bi-annual newsletter is recommended to achieve several communication goals including providing in-depth information on pertinent activities and improvements, and providing a visually stimulating medium with which to market Locke Street South. Newsletters should have a broader distribution beyond BIA members.
- **Locke Street South maps and directories:** maps and directories can fulfill several objectives including providing an inventory of Locke Street South businesses, promoting the diversity of Locke Street South, providing a useful resource to employees and visitors, and offering a direct visible benefit to ratepayers. Advertising could also be sought for the directory to defray costs. It is important that the directory be directly applicable to select target markets such as workers, tourists, and locals. Eating and drinking establishments, being a primary need of map users, should be listed directly across from the map, making them easy to locate. These can be online first with hardcopy directories at a later date. A simple directory on a bookmark-type postcard is an effective way to communicate the businesses along Locke Street BIA.

- **Annual community updates:** the Locke Street BIA should provide an annual update in a town hall format to showcase Locke Street South improvements, challenges, and opportunities.
- **Quarterly issue forums:** quarterly forums can feature speakers on a variety of issues ranging from updates on projects, expansion news, festivals and events, construction projects, retailing workshops (merchandising display, trends, holiday season retail).
- **Member and ratepayer surveys:** annual member surveys should be undertaken to track overall satisfaction with both the BIA's programs and general Locke Street South perceptions in order to establish benchmarks and monitor progress.
- **Funding:** an initial budget of approximately \$10,000, composed of a ratepayer's special assessment for operational programs, has been complemented by other grants from the City of Hamilton. As the BIA expands it will be important to raise the budget proportionately. The BIA may consider a slight decrease in the member rate as more properties are added to the BIA. The Locke Street BIA should work towards a budget of over \$60,000 when the expansions are complete.

Hamilton BIAs 2007 Budgets

| BIA | Budget | Levy |
|-----------------------|----------------------|----------------------|
| Barton Village | \$ 33,000.00 | \$ 33,000.00 |
| Concession Street | \$ 64,950.00 | \$ 64,950.00 |
| Downtown Hamilton | \$ 236,000.00 | \$ 197,000.00 |
| Dundas | \$ 131,300.00 | \$ 100,000.00 |
| International Village | \$ 145,000.00 | \$ 145,000.00 |
| King West | \$ 9,000.00 | \$ 4,500.00 |
| Locke Street | \$ 10,000.00 | \$ 10,000.00 |
| Main West | \$ 14,525.00 | \$ 14,525.00 |
| Ottawa Street | \$ 120,472.00 | \$ 115,000.00 |
| Stoney Creek | \$ 29,000.00 | \$ 15,616.63 |
| Waterdown | \$ 53,572.00 | \$ 37,080.00 |
| Westdale | \$ 120,000.00 | \$ 120,000.00 |
| Total | \$ 966,819.00 | \$ 856,671.63 |

Source: City of Hamilton

- Additional funds may be raised for project-specific activities such as festivals and events or specific capital projects.
- The budget should be split one-third on administrative expenses and one-third on advertising and promotion, and one-third on beautification.

Comparable Markets

An examination of business district management organizations in Toronto provides a context for evaluating Locke Street South’s organizational needs. A review has been provided in Appendix A.

Recommendations – Organization

| Action Step | Time Frame | Responsibility |
|---|----------------------|--|
| Establish a committee and develop business case for BIA expansion, outlining benefits, accomplishments, and future business plan including proposed budget | Immediate | Locke Street BIA |
| BIA to canvas for support and increase communication and work with non-members | Immediate | Locke Street BIA, City |
| Develop a full set of communication tools depending on budgets and resource time | Immediate | Locke Street BIA |
| Determine future needs regarding staffing for BIA | Within 18 months | Locke Street BIA |
| Evaluate BIA committees ensuring that the following are included: beautification (clean and safe) and urban design, events, promotions and public relations, retention and recruitment, and parking | Within 18 months | Locke Street South Taskforce, City |
| Develop roles, responsibilities, and organizational needs of supporting and partnership groups for the implementation of the business plan (City, library, houses of worship, etc.) | Short term | Locke Street BIA, City, other stakeholders |
| Develop methods for increasing private/public sector investment including corporations, foundations, public sectors, houses of worship, and other private sector bodies | Short-to-medium term | Locke Street BIA |

6.2 Programs for Enjoyable Shopping

Beautification

Unlike many districts, which are often surrounded by unattractive parking lots or other such spaces, Locke Street South's benefit is the attractive residential character that abuts the retail area. This creates a more multi-dimensional retail district whose activity does not end at 5:00 pm but instead continues throughout the day and throughout the week. However, because of this tight framework, the landscape and streetscape planners have to be very cognizant of retaining this benefit while still allowing for ease of shopping and sidewalk passage.

The narrow sidewalks force residents to interact with one another and in effect bring the neighbourhood and community closer. Streetscaping needs to preserve this aspect but also work towards beautifying the street.

To avoid visual and real clutter on the sidewalks, the landscape planners may look at the following examples.



This hydro pole in Downtown Victoria serves the function of a wayfinding map.



A bike rack in Vienna also serves as a wayfinding tool.



The poles in Downtown Montreal hold lights, signage, and small garbage receptacles.



While space for trees along Locke Street may be limited, bump-outs with plants and trees may be accommodated on the side streets that are adjacent. This is the case on St. Laurent Boulevard in Montreal.



Locke Street should encourage pedestrians to easily cross from one side to the other. Easily accessible, double-loaded (retail on both sides), streets are highly desirable.



With limited patio space on Locke Street, restaurants can create an outdoor feeling with accordion-type doors or roller doors that allow people to see and be seen.



With limited space for benches, an alternative is to provide granite blocks for seating. This also matches the natural setting of the escarpment to the south. This is used in Downtown Moncton.



Granite blocks are used with consistency on pole bases to reinforce the image of Downtown Moncton as conducive to sitting and resting.



The blocks can be grouped together to form an intimate seating area allows people to stop and socialize.



With limited sidewalks, St. Anne de Bellevue in Montreal allows for trees and lamp posts on small bump-outs in the parking lane, with very little interference in the available parking space.



The landscape may also look to creating unique benches that match the independent and creative spirit of Locke Street.



Given the tight space, a small, hard-scaped parkette allows for social gathering. The seating is arranged to encourage interaction.

Parking

Parking is extremely important to Locke Street, especially given the absence of municipal or private parking lots nearby. Before proceeding with a plan for parking, the following must be done:

- Ensure an ample turnover of on-street parking. This includes dissuading business owners and staff from parking on Locke Street.
- Discuss with houses of worship to ensure that customers can use their parking lots when they are not being used.
- Determine whether Locke Street parking meters will help the area by offering a timely turnover of parking spaces, or be a hindrance by discouraging visitors.
- Ensure that, if parking meters are introduced to Locke Street, excessive parking on the side streets will not interfere with the local residents. Any parking study must assess the impact on residential areas abutting Locke Street.
- The City should develop a long-term strategy for parking along Locke Street that provides for short-term parking and long-term parking needs
- Ensure that there is minimum 2 hour parking along Locke Street.

The BIA will need to develop a parking management program of informing customers of where they can park (on Locke Street, side streets, or house of worship parking lots), and of any discounts or promotions that can be achieved and when they will occur (e.g., free Saturday parking, free evening parking). This will have to be marketed to the public, businesses, and property owners.

Hospitality Programs

Concierge programs need to be established as a way of direct marketing to visitors. Offering discounts to Hamilton and regional hospitality (hotel, attractions) workers will help to ensure that they use Locke Street businesses and will be more likely to recommend them to visitors who ask for information on where to go. An event for hospitality workers is also a good way to say thank you for working with Locke Street.

Residential Relations

As Locke Street grows, it is important that the BIA develop a strong working relationship with the local neighbourhood. They have begun the initiative with community food share programs. However, retail development will require active listening, coordination, and communication. This ensures that retail establishments such as restaurants do not overly interfere with residential living. Appendix B includes a framework for discussing neighbourhood issues.

| Action Step | Time Frame | Responsibility |
|--|-------------------------|---|
| Review beautification plans for Locke Street. Ensure there is buy-in from all property owners and businesses. Determine what is feasible given the tight sidewalks | Short Term to long term | City and partner with BIA and other Locke Street stakeholders |
| Develop a parking strategy | Short Term to long term | City and partner with BIA and other Locke Street stakeholders |
| Work on developing a hospitality program | Short Term and ongoing | Locke Street BIA |
| Continue to develop relations with neighbourhood groups | Short Term and ongoing | Locke Street BIA |

6.3 *Locke Street's Commercial Composition*

Currently, the BIA geographic boundary is too small for a commercial plan. The larger retail corridor must be considered for a full strategic plan. There are several retail commercial principles that should be adhered to.

Principles of Commercial Success

As Locke Street BIA is well aware, there are no overnight miracles in commercial business district development. Locke Street BIA has been steadily progressing, prioritizing projects, and marketing itself. Locke Street BIA is committed to the goals of enhancing the area for the betterment of the community and, foremost, the merchants.

The principles underlying the future commercial success of Locke Street are as follows:

1. Ensure there is an enabling organization to carry out the marketing, commercial, and physical requirements to continually improve the area.

The strength of any revitalization program is based on having an effective organization. The organization creates a broad-based partnership among public and private sector interests, to provide leadership and resources to propel and maintain the BIA's goals. Currently, the board works effectively together to create positive change, and is ready to handle increased responsibility. Many merchants, although they do not actively participate, are supportive of the BIA, its goals and objectives, and the work of the marketing committee. Continued communication to encourage support and participation comes from a "carrot and stick" approach, such as façade improvement money for businesses (carrot) and peer pressure to participate, as well as code enforcement (stick). Often the best way to solicit participation from inactive members is to have a peer retailer whom they respect visit them and ask them to help out. Communication is vital as the BIA plans its expansion.

2. Ensure the basics are in place.

Locke Street is a neighbourhood main street for over 20,000 people. Overall, Locke Street offers some basic goods and services including grocery items, limited financial services, convenience stores, restaurants, and cafés. The area is also relatively safe and clean. What is important for Locke Street will be to ensure that these successful businesses remain healthy. Retail retention programs should be enhanced so that good, quality businesses will stay and remain competitive as new businesses open.

Recruitment should focus on other convenience oriented goods and services such as health care.

3. Build off strengths.

Like any marketed consumer product or brand, Locke Street has several important commercial attributes, namely:

- An attractive environment
- A somewhat isolated location
- Historical architecture
- A very low vacancy rate (non-existent)
- A wide selection of businesses
- Friendly people
- A health conscious, nature loving attitude
- A small community atmosphere, very welcoming and non-judgmental
- Committed business owners that will help to achieve buy-in regarding business plans

It will be important for Locke Street to capitalize on these strengths.

4. Linkages are critical.

The power of a retail business district is rooted in its diversity. Unless traffic flows between the various businesses of a shopping area, its diversity is compartmentalized and stifled. For this reason, it is crucial to ensure that linkages within Locke Street are established and well maintained. BIA expansion from Aberdeen Avenue to Main Street is important to ensure that there is a common voice that is marketed to potential consumers. Improving the retail viability of commercial businesses south of Main Street West and Aberdeen Avenue follows from this expansion. Actions can be taken to promote a more cohesive feel through retail continuity, marketing (signs, banners, street furniture, physical design of sidewalks, trees, bump-outs), economic development opportunities (e.g., redevelopment from residential to commercial, improvement of access from street to retailers with stairs, retailers serving the local neighbourhood, other cultural businesses that draw people), and other visual clues that allow the Locke Street visitor to continue the shopping experience.

5. Create a specialty niche.

The specialty niche of Locke Street is changing. While antiques remain a valid business base, the specialty niche is expanding to including other leisure oriented retailers such as

art galleries and home furnishings. An added dimension is specialty convenience goods and services including grocery, health, and eating. Locke Street should build off its natural setting, historical buildings, streetscaping, left-leaning cultural heritage, and key commodity strengths to create a unique environment that offers a pleasant visual experience combined with a unique contemporary retail offering. This will encourage people to visit Locke Street more often, and also lead them to spend more time in the area. The overall feel of Locke Street is that it encourages visitors to be themselves in a free and welcoming community. Locke Street attracts both high income and moderate income residents both with and without children. Attitude is paramount: Locke Street is very positive and approachable.

Economic Development

A cooperative approach among property owners towards leasing or opening retail stores, restaurants, and services should be established. This approach requires property owners and landlords to be involved in endorsing the idea of searching for retailers and restricting the types of retailers to the agreed retail mix. Generally, this can work, but there are always landlords who need cash flow and cannot delay leasing, and thus take the first or best offer regardless of the plan. These landlords should not stand in the way of the program.

While vacancy is not a problem for Locke Street, this program will be important for Locke Street BIA in order to respond quickly when a vacancy occurs. Having the resources in place to find the most appropriate tenant/retailer (or even developing a waiting list of retailers) will ensure that Locke Street continually works towards its vision of building complementary stores and services. The benefit is a retail district that will be more enjoyable for shoppers with fewer turnovers of businesses. In addition, succession planning could be a major role for the Locke Street BIA. Finding would-be entrepreneurs to take over successful businesses is an important task.

As stated, retail in the greater Hamilton region (including Burlington and Oakville) is very competitive. Locke Street must use techniques similar to those of the most successful organizations in this region in order to attract the correct retail mix.

Retail Retention

There are many good retailers located on Locke Street. These retailers are assets to champion loudly. Locke Street is missing a golden opportunity to recruit new business to the area if those resources are not promoted. Leveraging the success of those thriving, prosperous businesses can be accomplished in several ways. First, existing retailers can begin to refocus their own retailing/ marketing efforts towards taking advantage of the local traffic (local residents, workers, and other visitors). Merchandising, display, price-point restructuring, renovation and façade improvement, expansion, or relocation should be re-evaluated in order to maximize the potential of the current and future traffic. Secondly, a successful business retention strategy can use the strength of the existing retailers and businesses to encourage prospective merchants to locate in the business district. This assists in developing a foundation for building a good business recruitment strategy. As an example, Starbucks expansion, or the relocation of stores from larger communities such as West Queen West in Toronto should be promoted.

As the recruitment effort becomes more successful, the retail climate in Locke Street will become more competitive. Marginal retailers will face more competition. These retailers must become as strong as the newer retailers. Locke Street BIA can begin to offer assistance in the form of marketing and display, but could benefit from a complete program of assistance in the areas of merchandising, façade improvement, technology, customer relationship marketing, and accounting, among others.

Locke Street will be able to supply retention services through the following means:

- Making educational tools (including videos, guidelines, and books) available to Locke Street BIA businesses and coordinating HABIA events for members.
- Offering seminars on topics such as merchandising, effective use of window displays, how to offer good customer service, and how to develop an Internet site (multi-channel retailing), safety, and façade improvement programs.
- Making demographic information from this report available so that businesses can target their promotions to customers better.
- Providing businesses with networking opportunities by holding meetings at different locations throughout the BIA. This gives local retailers the opportunity to learn about each other's businesses.
- Working with non-BIA retailers to develop coordinated marketing and events.
- Supporting cross-promotional efforts (e.g., a business directory). Reward businesses by providing marketing support for businesses that want to market themselves jointly. The BIA could supply additional marketing funds to those businesses that agree to cooperative advertising. For example, if four businesses wanted to pool their resources and advertise in a tourist newspaper/daytripper publication, the BIA

could reward these businesses by funding a portion of the total cost. This may also work with non-members along Locke Street.

- Retailers should work towards establishing relationships with buying organizations, with the aim of achieving better discounts for buying in bulk.
- Additional sales can be generated by assessing service add-ons. This can include sporting goods stores providing repair services, delivery services especially for grocery type items, personal shopping services and assistance with wardrobe, interior design services, among others.

One of the most attractive selling points for prospective retailers is the knowledge that they will be situated close to other strong stores. Because of this, upgrading existing retailers is also an important part of recruitment activities. Also, just as these are important services for existing retailers, new start-up retailers should be encouraged to take advantage of these services.

Selective Retail Recruitment

At the early stages of the BIA development, retail recruitment will be difficult. The goal of the BIA is to create an attractive retail environment for the consumers and retailers. This will lend itself to making it easier for property owners and brokers to lease spaces.

The coordination of prospective retailers with suitable vacant or undeveloped properties is essential, as is the distribution of correct information at appropriate times in the negotiation process. Generally, the BIA is not responsible for “signing up the retailer.” However, as stated, Locke Street BIA can be active in setting the stage with active beautification and marketing programs and potentially putting the property owner/landlord in contact with the retailer. Then the landlord (and lawyers) will frame the deal and sign it.

The BIA would be better served by selective retail recruitment whereby a defined business category (e.g., a bookstore/café) is chosen as a missing business and the BIA actively works to recruit this type of business.

While Locke Street does have a number of these retailers, further examples of target retailers beyond convenience goods and services that complement the vision include:

| Store Type | Examples |
|---------------------|---|
| Convenience goods | Specialty food, health, neighbourhood services (e.g., dry cleaning, beauty and spa), small hardware (e.g., Pro Hardware), fitness studio |
| Eating and drinking | Unique eating including Asian, Korean, Japanese, Thai, Mexican, Italian, fusion, health conscious, brew pubs, as much outdoor or open window dining as possible, jazz, wine bar, fair-trade coffee house, self-cook, tapas bar |
| Destination/Leisure | Home decorating, garden, unique one-of-a-kind gifts, sporting goods, art galleries, hand-crafted furniture, hand-made jewelry, scooters (e.g., Vespa dealer), sporting goods, book and music stores with cafés , Apple products |
| Other Options | Theatre, community facilities, learning |



Health-related retail is a huge growth sector. Interest in small, specialty niche players is growing as retailers such as Shoppers Drug Mart become larger.



Unique retailers such as Vespa match the eclectic attitudes of the local population.

Recommendations

| Action Step | Time Frame | Responsibility |
|---|---------------------|------------------------|
| Hold regular meetings (two to three times a year) with stakeholders on the status of the commercial environment and upcoming changes (e.g. BIA expansion, bylaws, new commercial developments, other changes) with learnings as a key component. | Short Term | Locke Street BIA |
| Commit to a program of increasing the learning of merchants and property owners through education, seminars, sharing demographic information, and increased networking. | Short Term | Locke Street BIA |
| Use the existing database as a starting point to profile each business. Develop a simple retail recruitment package on why a business should locate in Locke Street. When a property becomes vacant, Locke Street will be able to react immediately with a list of prospective tenants to call upon to market the property successfully. Focus on increasing convenience goods for the entire retail corridor by 20%. | Medium Term | Locke Street BIA |
| Search out other complementary uses, such as redeveloping properties for higher commercial usage. | Medium to long term | Locke Street BIA |
| Review zoning bylaws on an as needed basis. | Medium to long term | Locke Street BIA, City |

6.4 Marketing and Branding Strategies

The overall goal for Locke Street BIA is to build a comprehensive marketing and branding platform to leverage commercial activity.

Kirkendall and Durand Residents and Workers

- Closest and highest impact market
- Substantial population of local residents
- Workers are a small group but marketable
- Inexpensive to reach and highly targeted
- Biggest return for the investment

West Hamilton Visitors

- Approximately 200,000 residents
- Over 56% had visited – relatively high penetration; however, infrequent visitation
- Generally positive perceptions of Locke Street, but believe beautification is an issue along with parking
- Tend to be higher income households of well-educated people
- Should be targeted for increased visitation or longer stays

Antique Industry

- Target market for traditional marketing
- Currently seeing the focus of Locke Street shift away from it

Based on the preceding Strengths, Weaknesses, Opportunities, and Threats situation analysis, and the target markets identified for Locke Street, along with a branding workshop, the following marketing and branding recommendations are provided:

Locke Street BIA has developed a marketing concept based on the idea of “Shop Locke” and manifested in the campaign “Locke is...”.

The importance of emphasizing the shopping aspect of Locke Street is extremely important. It keeps the message simple and clear. Consumers react favourably to this type of direct marketing program.

The “Locke is...” campaign builds upon the unique strengths of Locke Street as a welcoming community that is nonjudgmental, open, diverse, and generally left-leaning in attitude.

The campaign focuses on the consumer's ability to "be who you are" on Locke Street. There is no pretension, just straightforward honesty. Locke Street is the place to be and be yourself.

The campaign can be rolled out in several iterations including words such as:

- Inspiring
- Energetic
- Delightful



BE *inspired.*

Be inspired by a place where one-of-a-kind locally-owned shops, restaurants, arts and cultural happenings are all within walking distance. A place where people stop to chat with one another because the day's pace seems less hurried and more friendly. Downtown Long Beach is a place where small town friendliness meets big city choices. Once you visit, you will thank yourself for making it a Downtown kind of day.

The place to be. And be yourself.

DOWNTOWN LONG BEACH

Waterfront | East Village | Pine Street | North Pine | Financial Gateway

Learn more: ph: 562.436.4259 or visit www.dlba.org



BE *delighted.*

Be delighted by a place where one-of-a-kind locally-owned shops, restaurants, arts and cultural happenings are all within walking distance. A place where people stop to chat with one another because the day's pace seems less hurried and more friendly. Downtown Long Beach is a place where small town friendliness meets big city choices. Once you visit, you will thank yourself for making it a Downtown kind of day.

The place to be. And be yourself.

DOWNTOWN LONG BEACH

Waterfront | East Village | Pine Street | North Pine | Financial Gateway

Learn more: ph: 562.436.4259 or visit www.dlba.org



BE *energized.*

Be energized by a place where one-of-a kind locally-owned shops, restaurants, arts and cultural happenings are all within walking distance. A place where people stop to chat with one another because the day's pace seems less hurried and more friendly. Downtown Long Beach is a place where small town friendliness meets big city choices. Once you visit, you will thank yourself for making it a Downtown kind of day.

The place to be. And be yourself.

DOWNTOWN LONG BEACH

Waterfront | East Village | Pine Street | North Pine | Financial Gateway

Learn more: ph: 562.436.4259 or visit www.dlba.org



BE *yourself.*

Be invigorated by a place where one-of-a kind locally-owned restaurants, shops, arts and cultural happenings are all within walking distance. A place where people stop to chat with one another because the day's pace seems less hurried and more friendly.

Downtown Long Beach is a place where small town friendliness meets big city choices. Once you visit, you will thank yourself for making it a Downtown kind of day.

The place to be. And be yourself.

DOWNTOWN LONG BEACH

Waterfront | East Village | Pine Street | North Pine | Financial Gateway

Learn more: ph: 562.436.4259 or visit www.dlba.org

Why does a marketing program matter and deserve proper funding? Marketing can be the catalyst that will build the image of Locke Street as a place of action, progress, and activity. It can play an integral part in creating a “buzz” for the area and help put a face on the efforts of BIA and the City, property owners, retailers, and other local stakeholders (library, schools, houses of worship, etc.). Marketing is also a key element in retail retention. A consumer/retail marketing strategy – choosing to focus on retail retention, or the health and well-being of existing retail businesses – can also be used as the foundation of an economic development program, as opposed to retail recruitment.

Five Major Marketing Strategies

There are five major areas of work for Locke Street from a marketing perspective. Each of these strategies is presented with example tactics to help bring the strategy to life. Implementation of a well-conceived marketing program requires execution of all five strategies. No single strategy is more important than another and we strongly recommend finding the resources to execute all five strategies.

Strategy One: Build the Locke Street Brand

A retail district brand is slightly different from a consumer product or other branding effort. The Locke Street BIA has limited control over the use of the name Locke Street and how it is affected by others. However, there are many things that can be done to build a single brand for the BIA. A key element in this process is deciding what the Locke Street BIA brand denotes. This can be determined by answering several questions:

- What are the key messages about Locke Street that should be included in all communications between related and involved organizations?
- What is our voice for community marketing?
- What is our positioning strategy vis-à-vis our competition?
- What are our current and desired perspectives on key issues?
- Who are the key targets for these communications?
- What are the key words that we associate with Locke Street?
- How can we all speak in unison about the positive nature of Locke Street as a place to live, go to school, do business, shop, have fun, and interact?

Once the brand is established for Locke Street, all creative elements produced for Locke Street should carry a single look and feel and a single positioning statement. The current positioning statement, “Locke Street is ...,” is effective when used in a combination of attributes that the target markets identify with. Moving forward, a Styleguide can be a very useful tool to create a single design approach for all Locke Street communications. The Styleguide addresses such elements as typefont, use of logo, colors, and overall design approach. This helps keep all Locke Street communications consistent and reflective of the brand.

If funding is made available (raised internally through members or through assistance with provincial programs), we recommend execution of a Locke Street branding campaign targeting the key market segments presented in this report. Given the lower media costs available in Hamilton, it is possible to implement a branding campaign for Locke Street within reasonable budget constraints. Advertising and public relations are the two major marketing tools used to create the brand, and Locke Street should consider a multi-pronged approach using a combination of Hamilton media options (radio, print, direct mail) focusing solely on the most likely customers to shop/eat/experience Locke Street. These ads and PR efforts are used to build the overall brand of Locke Street in the eyes of the most profitable customers. The additional benefit is that the ads can also be used to help generate demand for living in the area. The ads should be frequent within specific seasons. There is no need to be running ads in the depth of winter. Ads should focus on Spring, Summer, and Holiday shopping periods with PR efforts filling the gaps.

The combination of a defined brand position, consistent and powerful tagline, advertising and PR campaign and unified voice for Locke Street will help to create a momentum for the area and support business recruitment efforts as well as helping to keep the existing businesses healthy.

Strategy Two: Traffic and Sales Building Promotions

Unfortunately, it is not enough to just run some ads to generate interest and excitement for Locke Street. The branding ads “open the door” to consumers, helping them to understand what Locke Street is and what it is for. However, there should be a secondary marketing strategy to supplement this effort.

Locke Street has done an effective job in the past of executing the Street Festival. We propose supplementing these events with a couple of other sales promotion programs that will help to drive usage (traffic) to Locke Street and create an overall image enhancement that will help drive residential demand.

These special promotions are typically executed at key merchandising seasons. For example, there could be a summer promotion and a holiday season promotion. The intent of each sales promotion is to get people motivated to make a visit to Locke Street and make purchases while they are there. They can be categorical (i.e., retail, food) or they can be general.

Some tactical examples of this type of promotion are as follows:

- Major categorical events, such as “Food and Wine Festivals,” supporting a specific area of business. In this case, special offers are made to the consumer to drive them into Locke Street.
- Cause-related programs that help to generate funding for a specific organization (i.e., artist organizations, St. Joseph school, neighbourhood food sharing program) while helping to build sales. For example, Locke Street could produce a shopping discount card for a specific two-week period. Shoppers can “buy” the card for a donation to a charitable organization, and that card then provides them with numerous discounts in Locke Street stores, restaurants, etc. for that timeframe.

Execution of at least two well-coordinated sales promotions during the year will be critical to the success of Locke Street’s retailers and restaurants as a supplement to the overall branding initiative.

Strategy Four: Barrier Free Locke Street Access and Usage

Marketing is not just about advertising and special promotions. It is also critical to break down the barriers that may exist for consumers' utilization of Locke Street. Consumers need information to make the decision to visit. For Locke Street, there are several major actions that should be taken. First, Locke Street must have visibility from Main Street West and Aberdeen Avenue. Currently, it is virtually impossible for a visitor to determine that there is a place called Locke Street. Even if they know, they have to work to find it. Solutions, which are critical, include signage visibility and wayfinding systems to direct customers into Locke Street from all points. Additionally, customers need to know where to go to get information. A well-designed, informative, and easy-to-use Website is the best option for this. It can address many of the questions of consumers, including:

- What stores and restaurants are on Locke Street?
- What are the shopping hours?
- How do I get there?
- Where do I park?

Strategy Five: Business-to-Business Marketing to Lease Space

Locke Street has a need for a coordinated leasing marketing program to impact who leases space. Actions involved in this program should include the following:

- Create coordinated sales collateral materials that tell the Locke Street story completely and concisely using research findings to make the case for Locke Street as a great place for your business
- Develop an online marketing strategy for quick information (Website) and keep in touch with the brokerage community
- Use PR strategies to tell stories in targeted publications, including success stories of Locke Street businesses
- Create a comprehensive marketing strategy to communicate and educate the brokerage community and targeted businesses
- When funds allow, advertise the Locke Street experience to prospective businesses in target markets and for specific uses (e.g., home furnishings)

Summary

The combination of a powerful branding campaign, specific seasonal sales promotions, niche market programs, barrier-free usage and business-to-business marketing will help Locke Street expedite its development efforts while simultaneously contributing to the strengthening of the existing businesses in the area.

| Action Step | Time Frame | Responsibility |
|---|---------------------|---|
| Develop a Web site | Short Term | Locke Street BIA |
| Create marketing materials that capture the essence of Locke Street | Short Term | Locke Street BIA |
| Enhance public relations with local media | Short Term | Locke Street BIA |
| Develop and establish distinctive signage on the approaches to Locke Street commercial area | Medium Term | Town, Locke Street BIA, Locke Street businesses and property owners |
| Develop a Locke Street brand | Medium to Long Term | Locke Street BIA |
| Develop a story about Locke Street to sell to brokerage community on an as needed basis | Medium to Long Term | Locke Street BIA |

Appendix A – Toronto BIA Budget Examples

Appendix B – Neighbourhood Conflict Resolution



STAFF REPORT ACTION REQUIRED

2008 Business Improvement Area Operating Budgets: Report No. 1

| | |
|--------------------------|---|
| Date: | November 13, 2007 |
| To: | Economic Development Committee |
| From: | Deputy City Manager and Chief Financial Officer |
| Wards: | All |
| Reference Number: | P:\2007\Internal Services\FP\ed07029FP (AFS#6259) |

SUMMARY

This report brings forward Business Improvement Area (BIA) annual operating budgets for approval by Council as required by the *City of Toronto Act, 2006*. Council approval is required to permit the City to collect funds through the tax levy on behalf of the BIAs.

Complete budgets and supporting documentation received by October 18, 2007 have been reviewed and are reported herein; BIA budgets received after this date will be brought forward in later reports. Of the 63 established BIAs, 18 BIA budgets are submitted for approval in this first report.

The recommendations reflect 2008 approved budgets for BIAs and have been reviewed by staff to ensure BIA budgets reflect Council's approved policies and practices.

RECOMMENDATIONS

The Deputy City Manager and Chief Financial Officer recommends that:

1. the Economic Development Committee adopt and certify to City Council the 2008 expenditure requests and levy requirements of the following Business Improvement Areas:

| Business Improvement Area | 2008 Expenditure Estimates (\$) | 2008 Levy Funds Required (\$) |
|---------------------------|---------------------------------------|-------------------------------------|
| Bloor by the Park | 70,352 | 65,752 |
| Bloor-Yorkville | 2,566,711 | 1,642,834 |
| Bloorcourt Village | 140,565 | 127,213 |
| College Promenade | 152,419 | 128,589 |
| Corso Italia | 506,960 | 165,547 |
| Dundas West | 102,629 | 96,591 |
| Gerrard India Bazaar | 249,219 | 142,653 |
| Junction Gardens | 379,637 | 271,024 |
| Liberty Village | 379,451 | 194,160 |
| Mimico by the Lake | 51,631 | 34,495 |
| Parkdale Village | 537,114 | 211,163 |
| Riverside District | 159,346 | 136,692 |
| Sheppard East Village | 193,057 | 193,057 |
| The Beach | 189,964 | 165,150 |
| Uptown Yonge | 237,089 | 115,500 |
| West Queen West | 237,943 | 231,365 |
| Wexford Heights | 271,179 | 184,309 |
| Yonge-Lawrence Village | 190,945 | 182,707 |

2. authority be granted for the introduction of the necessary bill in Council.

FINANCIAL IMPACT

No City funding is required since Business Improvement Area budgets are raised by a special levy on members which totals \$4,288,801 in this report.

All of the 2008 BIA operating budgets submitted for consideration are balanced budgets. The appeal provision surplus or appeal provision deficit for each BIA, as determined by the Revenue Services Division, has been addressed by the BIA and incorporated into their 2008 Operating Budget. The BIA budgets have provisions for required capital cost-sharing contributions for those projects approved in 2007 or prior and carried forward into 2008, as well as new capital cost-share projects approved in the 2008 Capital Budget for Economic Development, Culture and Tourism.

DECISION HISTORY

BIA Operating Budget Process:

The City of Toronto Municipal Code Chapter 19 and the *City of Toronto Act, 2006* require that BIA operating budgets be approved by Council. General membership and Board of Management meetings at which the BIA 2008 budgets were approved are set out below:

| Business Improvement Area | Approved by Board of Management | Approved by Membership |
|---------------------------|------------------------------------|---------------------------|
| Bloor by the Park | October 10, 2007 | October 10, 2007 |
| Bloor-Yorkville | August 29, 2007 | October 17, 2007 |
| Bloorcourt Village | October 2, 2007 | October 16, 2007 |
| College Promenade | September 24, 2007 | October 11, 2007 |
| Corso Italia | September 4, 2007 | October 15, 2007 |
| Dundas West | October 1, 2007 | October 9, 2007 |
| Gerrard India Bazaar | October 10, 2007 | October 17, 2007 |
| Junction Gardens | October 2, 2007 | October 16, 2007 |
| Liberty Village | September 13, 2007 | October 15, 2007 |
| Mimico by the Lake | October 16, 2007 | October 17, 2007 |
| Parkdale Village | October 15, 2007 | October 15, 2007 |
| Riverside District | October 18, 2007 | October 18, 2007 |
| Sheppard East Village | September 11, 2007 | October 16, 2007 |
| The Beach | October 16, 2007 | October 16, 2007 |
| Uptown Yonge | September 18, 2007 | October 16, 2007 |
| West Queen West | October 2, 2007 | October 16, 2007 |
| Wexford Heights | October 11, 2007 | October 15, 2007 |
| Yonge-Lawrence Village | October 16, 2007 | October 16, 2007 |

Appendix A includes a summary of the BIA budgets discussed in this report, including a calculation of their net levy requirements. Appendix B sets out the status of 2008 BIA operating budget submissions.

Appeal Provision Review:

On July 30, 2002, City Council adopted a report entitled “Issues Related to Business Improvement Associations (BIA)”. Among other items, the Finance Department (currently the Revenue Services Division) was directed to conduct an annual review and analysis of the assessment appeal provision for each BIA, in order to determine if the provision is sufficient to meet expected revenue reductions from pending assessment appeals.

The assessment appeal provision is intended to protect the cashflows and revenues required by the BIAs to meet its operating obligations in the future, rather than BIAs directly compensating the City for assessment appeal reductions. The appeal provision provides a contingency, which is used to offset appeal reductions.

The result of the assessment appeal provision review and analysis for the individual BIA as of August 16, 2007 identified either a provision surplus or provision deficit. Each BIA is required to address the identified surplus or deficit amount within their respective operating budget for the following fiscal year. The recommended 2008 BIA Operating Budgets reflect the disposition of the resultant provision surplus or deficit accordingly.

BIA Capital Cost-share Project Funding:

On July 22, 2003, City Council adopted a report entitled “Business Improvement Area (BIA) Capital Cost-Sharing Program Review” approving the BIA Capital Cost-Sharing Program Guidelines. This program is part of the Economic Development Capital Budget. The program guidelines set out eligibility criteria that BIAs must satisfy in order to participate in the BIA Capital Cost-Sharing Program, including one criteria which requires the availability of the BIA’s share of funding. Prior to making a capital cost-sharing request, the BIA must have in place its share of the project funding (50 percent). If the project is to be phased-in over a period of years, the BIA must have in place 50 percent of the cost of each individual phase prior to making a capital request for matching funds for that phase. For the purposes of this requirement, the BIA will be allowed to include capital funding to be budgeted for the year in which the capital project is to take place. Another eligibility criteria is that the BIA must have an operating budget, adopted at a general meeting of the BIA and approved by Council, for the year the project is to be implemented.

A review of each of the BIA’s 2008 Operating Budget supporting documentation by the BIA Office and Financial Planning Division staff shows that those BIAs with capital cost-share projects approved by the City in 2007 or prior and carried forward into 2008, and new capital projects approved in the 2008 Economic Development Capital Budget, have all met the program eligibility criteria of having in place its 50 percent share of the project funding. This share may be reflected in the BIA’s prior years’ accumulated surplus (cash in-hand reserved for specific capital cost-share projects) and/or shown as a capital expenditure item in the BIA’s 2008 operating budget.

COMMENTS

The *Bloor by the Park BIA* 2008 Operating Budget was approved at meetings of the BIA’s Board of Management and its general membership both held on October 10, 2007. The balanced budget of \$70,352 in capital and operating expenditures will be funded from a 2008 levy of \$65,752 and other anticipated income of \$4,600. An operating surplus of \$21,975 is projected in 2007 as a result of not undertaking a proposed major festival and advertising. It is recommended that the Bloor by the Park BIA’s 2008 budget of expenditures totalling \$70,352 and a BIA levy of \$65,752 be approved.

The ***Bloor-Yorkville BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on August 29, 2007 and its general membership held on October 17, 2007. The balanced budget reflects a 5% increase in the levy to \$1,642,834 to fund capital cost-shared projects, promotion and advertising, capital maintenance and administration expenditures in 2008. The incremental levy is needed to fund an appeal provision deficit. Other revenues include \$450,000 in sponsorships and \$100,000 in ticket sales expected from the Sante Wine Festival, plus \$30,000 of interest income. The 2008 budget for promotion and advertising now reflects the full event costs of the Sante Festival rather than the net cost that was budgeted in past years. Accumulated funds of \$343,877 will be used to fund the pedestrian lights and tree lighting capital cost-share projects of \$125,000 and the remainder to cover Bloor-Yorkville BIA's contribution towards the Bloor Street Transformation Project. The BIA is forecasting an operating surplus of \$120,712 in 2007; this surplus will be reserved for the Bloor Street Transformation Project. It is recommended that the Bloor-Yorkville BIA's 2008 budget of gross expenditures totalling \$2,566,711 and a BIA levy of \$1,642,834 be approved.

The ***Bloorcourt Village BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 2, 2007 and its general membership held on October 16, 2007. The balanced budget of capital and operating expenditures of \$140,565 is similar to 2007 except for a \$5,000 increase in the promotional events budget. The proposed expenditures will be funded by revenues from a 6% increase in the BIA levy requirement to \$127,213, an appeal provision surplus of \$6,334 and other anticipated income of \$7,018. A projected operating deficit of \$10,473 in 2007 resulting from payment of a prior year's streetscape improvement capital cost-share project will be funded from the BIA's accumulated surplus. It is recommended that the Bloorcourt Village BIA's 2008 budget of expenditures totalling \$140,565 and a BIA levy of \$127,213 be approved.

The ***College Promenade BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on September 24, 2007 and its general membership held on October 11, 2007. The BIA proposes to maintain the same levy as in 2007 to fund capital and operating expenditures. The main component of the budget is fundraising revenue of nearly \$100,000 for the proposed pedestrian lamp posts, a future streetscaping capital project to be cost-shared with the City. To balance the budget, the BIA will use \$4,140 of its accumulated surplus, the appeal provision surplus of \$11,151, and expects \$8,539 of interest income. It is recommended that the College Promenade BIA's 2008 budget of expenditures totalling \$152,419 and a BIA levy of \$128,589 be approved.

The ***Corso Italia BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on September 4, 2007 and its general membership held on October 15, 2007. The BIA proposes to reduce the levy by 20% in 2008 to assist the local merchants through the TTC construction period. To offset the levy reduction, the BIA will use \$32,285 of its accumulated surplus funds and the appeal provision surplus of \$16,128. To offset the negative impact of construction on the street, the BIA will increase advertising and promotion of the area. The BIA expects a grant of \$30,000 from

the City's "Shop Local" campaign on St. Clair Avenue West to assist in this endeavour. The pedestrian lights capital project will be undertaken in 2008 during the TTC right-of-way and roadwork construction along St. Clair Avenue. Funds of \$250,000 reserved for this capital cost-share project will cover the BIA's portion of costs. To balance the budget, the BIA expects interest income of \$5,000 and \$8,000 in GST recoveries. It is recommended that the Corso Italia BIA's 2008 budget of expenditures totalling \$506,960 and a BIA levy of \$165,547 be approved.

The **Dundas West BIA** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 1, 2007 and its general membership held on October 9, 2007. The BIA proposes a balanced budget having expenditures of \$102,629 and revenues from a BIA levy of \$96,591 and other income of \$1,200. Planned expenditures include \$77,000 for streetscape improvements to be carried out in conjunction with the City's sidewalk reconstruction, \$14,338 for general BIA administration, \$1,800 for capital maintenance and \$710 for promotion. The appeal provision surplus of \$4,838 will provide contract consulting services to supplement staffing for a revitalization program. The 2007 proposed streetscape improvement capital cost-share project was deferred to 2008 because the City's sidewalk reconstruction project was postponed to 2008; this will result in a projected operating surplus of \$70,000 in 2007. It is recommended that the Dundas West BIA's 2008 budget of expenditures totalling \$102,629 and a BIA levy of \$96,591 be approved.

The **Gerrard India Bazaar BIA** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 10, 2007 and its general membership held on October 17, 2007. The balanced budget reflects revenues from a 5% increase in the BIA levy to \$142,653, anticipated festival sponsorships of \$80,000, the appeal provision surplus of \$21,566 and other revenues of \$5,000. The proposed budget provides for increased promotion and advertising, completion of the public art insert for the Gerrard-Ashdale Library event platform deferred from 2007, ongoing capital maintenance and general BIA administration. An operating surplus of \$7,145 is forecasted in 2007 due to more sponsorships of the Festival of South Asia. It is recommended that the Gerrard India Bazaar BIA's 2008 budget of expenditures totalling \$249,219 and a BIA levy of \$142,653 be approved.

The **Junction Gardens BIA** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 2, 2007 and its general membership held on October 16, 2007. The BIA plans to maintain the same level of expenditures in 2008 as in 2007 with an 11% reduced levy requirement in 2008 due to an expected appeal provision surplus of \$26,688 and other income of \$500. The BIA will be using its accumulated surplus funds of \$81,425 for capital cost-share projects that includes new banners and flower planters and to fund the 2008 centennial celebrations of the Junction. It is recommended that the Junction Gardens BIA's 2008 budget of expenditures totalling \$379,637 and a BIA levy of \$271,024 be approved.

The **Liberty Village BIA** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on September 13, 2007 and its general membership held on

October 15, 2007. The balanced budget of \$379,451 in expenditures for marketing and promotion, streetscape improvement capital cost-shared projects, maintenance and general BIA administration will be funded by revenues that include a 2.5% increase in the levy requirement to \$194,160, expected festival grants and sponsorships of \$18,000, interest income of \$7,000 and the appeal provision surplus of \$291. The BIA will use \$160,000 of its accumulated funds in 2008 for capital improvement of a one block section of King Street West. An operating surplus of \$31,770 is forecasted in 2007 from higher than expected festival sponsorship revenues and receipt of a Toronto EDSIP grant that was not anticipated. It is recommended that the Liberty Village BIA's 2008 budget of expenditures totalling \$379,451 and a BIA levy of \$194,160 be approved.

The *Mimico by the Lake BIA* 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 16, 2007 and its general membership held on October 17, 2007. The BIA proposes to increase the levy by 20% or nearly \$6,000 to fund a new Mimico Summer Festival to be held in connection with the opening of the Mimico Linear Park. The BIA also expects \$2,400 in grants from the City's Community Festivals and Special Events Program to support this planned event. Capital expenditures will be increased in 2008 for planned landscaping/streetscape improvements coincident with the opening of the Mimico Linear Park, including the purchase and installation of new banners, and installing BIA signage at the ends of the BIA. These capital cost-shared projects will be partly funded by \$13,306 of accumulated surplus funds. The balanced budget also includes other expected revenues of \$600 and the appeal provision surplus of \$831. It is recommended that the Mimico by the Lake BIA's 2008 budget of expenditures totalling \$51,631 and a BIA levy of \$34,495 be approved.

The *Parkdale Village BIA* 2008 Operating Budget was approved at meetings of the BIA's Board of Management and its general membership both held on October 15, 2007. The BIA proposes to increase the levy by 27% or \$44,385 more to fund a 20% increase in expenditures. The additional funds will be used to hire a facilitator for the Nuit Blanche event, graffiti removal, sidewalk pressure washing, increased capital maintenance, website enhancement, and for a new Christmas Open Late Thursdays Event. A major capital cost-share project for pedestrian lights will be undertaken in 2008 with \$300,000 of BIA funds already accumulated for this purpose. The BIA anticipates receiving grants of \$10,000 from the City's Commercial Research Grant Program to develop a strategic capital and marketing plan for the expanded BIA and \$5,000 from the Banner and Mural Program, the appeal provision surplus of \$8,451 and other income of \$2,500, all contributing towards a balanced budget. It is recommended that the Parkdale Village BIA's 2008 budget of expenditures totalling \$537,114 and a BIA levy of \$211,163 be approved.

The *Riverside District BIA* 2008 Operating Budget was approved at meetings of the BIA's Board of Management and its general membership both held on October 18, 2007. The BIA will be maintaining the same levy requirement for 2008 to fund a similar expenditure budget as in 2007. The appeal provision surplus of \$5,904 will be put towards more flowers and floral care for the planters. As in 2007, the BIA will be using \$15,000 of its accumulated surplus, an anticipated grant of \$1,000 from the City's

Community Festivals and Special Events Program and interest income of \$750 to help balance the budget. It is recommended that the Riverside District BIA's 2008 budget of expenditures totalling \$159,346 and a BIA levy of \$136,692 be approved.

The ***Sheppard East Village BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on September 11, 2007 and its general membership held on October 16, 2007. The BIA proposes a balanced budget with revenues from a 17% increase in the levy to \$193,057 to fund planned BIA capital projects, advertising and promotion, maintenance, and general BIA administration expenditures. The incremental levy will fund streetscape improvements, pedestrian lights, signage and BIA banners. A strategic plan and streetscape master plan was prepared in 2007 and now the BIA is ready to implement those capital improvement projects. An operating surplus of \$13,795 is forecasted in 2007, its first year of operation, as a proposed membership directory was deferred and the BIA received a grant of \$5,400 from the City's Commercial Research Grants Program as well as GST recoveries of \$6,000. It is recommended that the Sheppard East Village BIA's 2008 budget of expenditures totalling \$193,057 and a BIA levy of \$193,057 be approved.

The Beach BIA 2008 Operating Budget was approved at meetings of the BIA's Board of Management and its general membership both held on October 16, 2007. Overall, budgeted expenditures in 2008 will increase by 6 percent, driven mainly by capital and maintenance costs associated with an expanded planter program and the implementation of a winter plants program. Capital expenditures include the Woodbine Gateway signage cost-shared project that is an early initiative of the BIA's long term streetscape master plan. To fund the increased expenditures, the BIA is proposing to increase the levy by 11% to \$165,150. Other anticipated revenues of \$10,500, an anticipated grant of \$5,000 from the City's Employment Revitalization Program for murals and the appeal provision surplus of \$9,314 will help produce a balanced budget. It is recommended that The Beach BIA's 2008 budget of expenditures totalling \$189,964 and a BIA levy of \$165,150 be approved.

The ***Uptown Yonge BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on September 18, 2007 and its general membership held on October 16, 2007. The BIA proposes a balanced budget having expenditures of \$237,089 and revenues from a BIA levy of \$115,500 and use \$112,500 of its accumulated funds earmarked for capital cost-share projects. As well, the BIA will use the appeal provision surplus of \$7,539 and other anticipated revenues of \$1,550 to help offset expenses. Planned expenditures include \$172,500 for streetscape improvement capital cost-shared projects, \$11,589 for promotion and marketing initiatives, \$10,000 for new flowers for the planters and \$32,500 for general BIA administration. In 2007, actual expenditures are projected to be \$61,223 lower than budget as the BIA deferred the capital project for conduit work to 2008, the street maintenance initiative was not undertaken and the market research undertaken by the BIA cost less than originally estimated. It is recommended that the Uptown Yonge BIA's 2008 budget of expenditures totalling \$237,089 and a BIA levy of \$115,500 be approved.

The ***West Queen West BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 2, 2007 and its general membership held on October 16, 2007. The BIA proposes to double the expenditure budget to \$237,943 and more than double the levy to \$231,365 plus use the appeal provision surplus of \$6,578 to arrive at a balanced budget. The increased levy will provide for a full-time coordinator, start a capital reserve for future projects, a graffiti removal program, flowers and floral care for the planters, do more advertising and expand the outreach program. An operating surplus of \$22,178 is forecasted in 2007 resulting from not proceeding with proposed capital projects for street signs and street furniture. It is recommended that the West Queen West BIA's 2008 budget of expenditures totalling \$237,943 and a BIA levy of \$231,365 be approved.

The ***Wexford Heights BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management on October 11, 2007 and its general membership held on October 15, 2007. The BIA proposes a balanced budget by maintaining the same levy as in 2007 and having similar levels of advertising, marketing and promotion, general BIA administration and capital maintenance expenditures as in prior year. The BIA expects \$64,000 in festival revenue and vendor/event sponsorship of the Taste of Lawrence Festival event in 2008 along with \$5,000 of other revenue and the appeal provision surplus of \$17,870 to offset planned expenditures. The BIA received a grant of \$8,000 from the City's Commercial Research Grant Program in 2007 to develop a streetscape master plan. While the master plan was being prepared, proposed streetscape improvement capital projects were postponed until 2008. As a result, the BIA is projecting an operating surplus of \$29,270 in 2007. It is recommended that the Wexford Heights BIA's 2008 budget of expenditures totalling \$271,179 and a BIA levy of \$184,309 be approved.

The ***Yonge-Lawrence Village BIA*** 2008 Operating Budget was approved at meetings of the BIA's Board of Management and its general membership both held on October 16, 2007. The BIA proposes to increase the levy by 13% to \$182,707 to compensate for an appeal provision surplus of only \$1,738 that will be returned to the BIA in 2008. The BIA also expects other revenues of \$6,500 to provide a balance budget.

The expenditure budget of \$190,945 is consistent with last year's budget and actuals, and comprises of \$68,000 for advertising, marketing and promotion, \$53,000 for capital maintenance, \$42,835 for general BIA administration and \$10,500 for proposed capital cost-share projects for new banners and custom bicycle racks. It is recommended that the Yonge-Lawrence Village BIA's 2008 budget of expenditures totalling \$190,945 and a BIA levy of \$182,707 be approved.

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SIGNATURE

Joseph P. Pennachetti
Deputy City Manager and Chief Financial Officer

ATTACHMENTS

Appendix A – BIA Budget Summary
Appendix B – Status of BIA Budget Submission

APPENDIX A

| Bloor by the Park BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 57,648 | 57,648 | 65,752 |
| - Other Revenue | 4,000 | 4,100 | 4,600 |
| - Appeal Provision Surplus | 3,503 | 3,503 | N/A |
| - Contribution from Reserve for Capital Proj. | 0 | 26,185 | 0 |
| Total Revenues | 65,151 | 91,436 | 70,352 |
| Expenditures: | | | |
| - Administration | 11,910 | 9,220 | 12,000 |
| - Capital | 10,000 | 38,000 | 11,000 |
| - Maintenance | 17,000 | 15,000 | 19,000 |
| - Promotion & Advertising | 21,000 | 2,000 | 21,000 |
| - Appeal Provision Deficit | N/A | N/A | 1,375 |
| - 10% Provision for Assessment Appeal Reductions | 5,241 | 5,241 | 5,977 |
| Total Expenditures | 65,151 | 69,461 | 70,352 |
| Surplus/(Deficit) | 0 | 21,975 | 0 |

| Bloor-Yorkville BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 1,564,604 | 1,564,604 | 1,642,834 |
| - Other Revenue | 17,500 | 105,930 | 580,000 |
| - Appeal Provision Surplus | 4,513 | 4,513 | N/A |
| - Contribution from Accumulated Surplus | 254,600 | 0 | 343,877 |
| Total Revenues | 1,841,217 | 1,675,047 | 2,566,711 |
| Expenditures: | | | |
| - Administration | 410,080 | 431,180 | 450,800 |
| - Capital | 410,000 | 102,018 | 375,000 |
| - Maintenance | 450,500 | 450,500 | 394,000 |
| - Promotion & Advertising | 428,400 | 428,400 | 1,107,550 |
| - Appeal Provision Deficit | N/A | N/A | 90,012 |
| - 10% Provision for Assessment Appeal Reductions | 142,237 | 142,237 | 149,349 |
| Total Expenditures | 1,841,217 | 1,554,335 | 2,566,711 |
| Surplus/(Deficit) | 0 | 120,712 | 0 |

| Bloorcourt Village BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 119,512 | 119,512 | 127,213 |
| - Other Revenue | 7,000 | 8,251 | 7,018 |
| - Appeal Provision Surplus | 8,353 | 8,353 | 6,334 |
| Total Revenues | 134,865 | 136,116 | 140,565 |
| Expenditures: | | | |
| - Administration | 11,100 | 9,122 | 11,100 |
| - Capital | 25,000 | 46,929 | 25,000 |
| - Maintenance | 71,000 | 64,298 | 71,000 |
| - Promotion & Advertising | 16,900 | 15,375 | 21,900 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 10,865 | 10,865 | 11,565 |
| Total Expenditures | 134,865 | 146,589 | 140,565 |
| Surplus/(Deficit) | 0 | (10,473) | 0 |

| College Promenade BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 128,350 | 128,350 | 128,589 |
| - Other Revenue | 4,000 | 8,865 | 8,539 |
| - Appeal Provision Surplus | 8,942 | 8,942 | 11,151 |
| - Contribution from Accumulated Surplus | 3,346 | 0 | 4,140 |
| Total Revenues | 144,638 | 146,157 | 152,419 |
| Expenditures: | | | |
| - Administration | 5,770 | 4,480 | 5,400 |
| - Capital | 126,000 | 129,115 | 133,629 |
| - Maintenance | 1,000 | 0 | 1,000 |
| - Promotion & Advertising | 200 | 100 | 700 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 11,668 | 11,668 | 11,690 |
| Total Expenditures | 144,638 | 145,363 | 152,419 |
| Surplus/(Deficit) | 0 | 794 | 0 |

| Corso Italia BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 206,017 | 206,017 | 165,547 |
| - Other Revenue | 49,300 | 55,600 | 43,000 |
| - Appeal Provision Surplus | 13,027 | 13,027 | 16,128 |
| - Contribution from Accumulated Surplus | 0 | 0 | 282,285 |
| Total Revenues | 268,344 | 274,644 | 506,960 |
| Expenditures: | | | |
| - Administration | 72,815 | 32,830 | 36,410 |
| - Capital | 0 | 10,000 | 265,000 |
| - Maintenance | 49,000 | 40,000 | 22,500 |
| - Promotion & Advertising | 127,800 | 140,800 | 168,000 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 18,729 | 18,729 | 15,050 |
| Total Expenditures | 268,344 | 242,359 | 506,960 |
| Surplus/(Deficit) | 0 | 32,285 | 0 |

| Dundas West BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 96,591 | 96,591 | 96,591 |
| - Other Revenue | 1,200 | 13,050 | 1,200 |
| - Appeal Provision Surplus | N/A | N/A | 4,838 |
| Total Revenues | 97,791 | 109,641 | 102,629 |
| Expenditures: | | | |
| - Administration | 9,310 | 25,860 | 14,338 |
| - Capital | 79,000 | 3,750 | 77,000 |
| - Maintenance | 0 | 0 | 1,800 |
| - Promotion & Advertising | 700 | 1,250 | 710 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 8,781 | 8,781 | 8,781 |
| Total Expenditures | 97,791 | 39,641 | 102,629 |
| Surplus/(Deficit) | 0 | 70,000 | 0 |

| Gerrard India Bazaar BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 135,364 | 135,364 | 142,653 |
| - Other Revenue | 58,000 | 71,000 | 85,000 |
| - Appeal Provision Surplus | 7,944 | 7,944 | 21,566 |
| - Contribution from Accumulated Surplus | 15,000 | 0 | 0 |
| Total Revenues | 216,308 | 214,308 | 249,219 |
| Expenditures: | | | |
| - Administration | 54,002 | 57,782 | 60,185 |
| - Capital | 15,000 | 0 | 20,000 |
| - Maintenance | 10,000 | 10,000 | 10,000 |
| - Promotion & Advertising | 125,000 | 127,075 | 146,066 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 12,306 | 12,306 | 12,968 |
| Total Expenditures | 216,308 | 207,163 | 249,219 |
| Surplus/(Deficit) | 0 | 7,145 | 0 |

| Junction Gardens BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 303,727 | 303,727 | 271,024 |
| - Other Revenue | 0 | 3,200 | 500 |
| - Appeal Provision Surplus | N/A | N/A | 26,688 |
| - Contribution from Accumulated Surplus | 76,140 | 4,190 | 81,425 |
| Total Revenues | 379,867 | 311,117 | 379,637 |
| Expenditures: | | | |
| - Administration | 77,310 | 66,340 | 79,110 |
| - Capital | 8,000 | 0 | 60,000 |
| - Maintenance | 38,805 | 27,152 | 43,200 |
| - Promotion & Advertising | 153,727 | 115,600 | 172,688 |
| - Appeal Provision Deficit | 74,413 | 74,413 | N/A |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 27,612 | 27,612 | 24,639 |
| Total Expenditures | 379,867 | 311,117 | 379,637 |
| Surplus/(Deficit) | 0 | 0 | 0 |

| Liberty Village BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 189,396 | 189,396 | 194,160 |
| - Other Revenue | 32,000 | 58,600 | 25,000 |
| - Appeal Provision Surplus | 12,274 | 12,274 | 291 |
| - Contribution from Accumulated Surplus | 0 | 100,000 | 160,000 |
| Total Revenues | 233,670 | 360,270 | 379,451 |
| Expenditures: | | | |
| - Administration | 86,952 | 87,346 | 99,200 |
| - Capital | 28,500 | 110,000 | 150,000 |
| - Maintenance | 72,500 | 72,500 | 78,500 |
| - Promotion & Advertising | 28,500 | 41,436 | 34,100 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 17,218 | 17,218 | 17,651 |
| Total Expenditures | 233,670 | 328,500 | 379,451 |
| Surplus/(Deficit) | 0 | 31,770 | 0 |

| Mimico by the Lake BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 28,725 | 28,725 | 34,495 |
| - Other Revenue | 2,200 | 2,500 | 3,000 |
| - Appeal Provision Surplus | 1,136 | 1,136 | 831 |
| - Contribution from Accumulated Surplus | 5,000 | 0 | 13,306 |
| Total Revenues | 37,061 | 32,361 | 51,631 |
| Expenditures: | | | |
| - Administration | 2,250 | 2,189 | 2,250 |
| - Capital | 14,000 | 5,900 | 25,000 |
| - Maintenance | 12,000 | 6,450 | 9,945 |
| - Promotion & Advertising | 6,200 | 5,740 | 11,300 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 2,611 | 2,611 | 3,136 |
| Total Expenditures | 37,061 | 22,890 | 51,631 |
| Surplus/(Deficit) | 0 | 9,471 | 0 |

| Parkdale Village BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 166,778 | 166,778 | 211,163 |
| - Other Revenue | 17,500 | 23,750 | 17,500 |
| - Appeal Provision Surplus | 13,239 | 13,239 | 8,451 |
| - Contribution from Accumulated Surplus | 0 | 0 | 300,000 |
| Total Revenues | 197,517 | 203,767 | 537,114 |
| Expenditures: | | | |
| - Administration | 66,355 | 67,281 | 73,317 |
| - Capital | 25,000 | 25,000 | 325,000 |
| - Maintenance | 37,000 | 37,000 | 52,000 |
| - Promotion & Advertising | 54,000 | 54,000 | 67,600 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 15,162 | 15,162 | 19,197 |
| Total Expenditures | 197,517 | 198,443 | 537,114 |
| Surplus/(Deficit) | 0 | 5,324 | 0 |

| Riverside District BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 136,692 | 136,692 | 136,692 |
| - Other Revenue | 1,000 | 2,509 | 1,750 |
| - Appeal Provision Surplus | 1,555 | 1,555 | 5,904 |
| - Contribution from Accumulated Surplus | 15,000 | 15,000 | 15,000 |
| Total Revenues | 154,247 | 155,756 | 159,346 |
| Expenditures: | | | |
| - Administration | 44,210 | 47,733 | 49,109 |
| - Capital | 25,000 | 25,000 | 25,000 |
| - Maintenance | 38,310 | 35,300 | 42,110 |
| - Promotion & Advertising | 34,300 | 34,286 | 30,700 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 12,427 | 12,427 | 12,427 |
| Total Expenditures | 154,247 | 154,746 | 159,346 |
| Surplus/(Deficit) | 0 | 1,010 | 0 |

| Sheppard East Village BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 165,000 | 165,000 | 193,057 |
| - Other Revenue | 0 | 11,400 | 0 |
| Total Revenues | 165,000 | 176,400 | 193,057 |
| Expenditures: | | | |
| - Administration | 38,000 | 65,550 | 41,910 |
| - Capital | 51,000 | 25,000 | 82,000 |
| - Maintenance | 8,000 | 8,000 | 7,000 |
| - Promotion & Advertising | 53,000 | 49,055 | 44,000 |
| - Appeal Provision Deficit | N/A | N/A | 596 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 15,000 | 15,000 | 17,551 |
| Total Expenditures | 165,000 | 162,605 | 193,057 |
| Surplus/(Deficit) | 0 | 13,795 | 0 |

| The Beach BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 148,500 | 148,500 | 165,150 |
| - Other Revenue | 6,500 | 24,417 | 15,500 |
| - Appeal Provision Surplus | 5,706 | 5,706 | 9,314 |
| - Contribution from Accumulated Surplus | 18,424 | 3,727 | 0 |
| Total Revenues | 179,130 | 182,350 | 189,964 |
| Expenditures: | | | |
| - Administration | 52,100 | 53,505 | 57,250 |
| - Capital | 18,150 | 21,590 | 31,400 |
| - Maintenance | 31,550 | 37,400 | 47,000 |
| - Promotion & Advertising | 63,830 | 56,355 | 39,300 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 13,500 | 13,500 | 15,014 |
| Total Expenditures | 179,130 | 182,350 | 189,964 |
| Surplus/(Deficit) | 0 | 0 | 0 |

| Uptown Yonge BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 115,500 | 115,500 | 115,500 |
| - Other Revenue | 11,000 | 8,500 | 1,550 |
| - Appeal Provision Surplus | 3,963 | 3,963 | 7,539 |
| - Contribution from Accumulated Surplus | 54,000 | 0 | 112,500 |
| Total Revenues | 184,463 | 127,963 | 237,089 |
| Expenditures: | | | |
| - Administration | 30,038 | 28,940 | 32,500 |
| - Capital | 95,000 | 0 | 172,500 |
| - Maintenance | 10,000 | 0 | 10,000 |
| - Promotion & Advertising | 38,925 | 27,300 | 11,589 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 10,500 | 10,500 | 10,500 |
| Total Expenditures | 184,463 | 66,740 | 237,089 |
| Surplus/(Deficit) | 0 | 61,223 | 0 |

| West Queen West BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 103,949 | 103,949 | 231,365 |
| - Other Revenue | 5,000 | 137 | 0 |
| - Appeal Provision Surplus | 7,861 | 7,861 | 6,578 |
| Total Revenues | 116,810 | 111,947 | 237,943 |
| Expenditures: | | | |
| - Administration | 32,160 | 27,617 | 59,960 |
| - Capital | 47,500 | 23,000 | 58,750 |
| - Maintenance | 1,000 | 1,000 | 46,000 |
| - Promotion & Advertising | 26,700 | 28,702 | 52,200 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 9,450 | 9,450 | 21,033 |
| Total Expenditures | 116,810 | 89,769 | 237,943 |
| Surplus/(Deficit) | 0 | 22,178 | 0 |

| Wexford Heights BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 183,121 | 183,121 | 184,309 |
| - Other Revenue (vendor/sponsors/festival) | 62,400 | 74,190 | 69,000 |
| - Appeal Provision Surplus | 12,300 | 12,300 | 17,870 |
| Total Revenues | 257,821 | 269,611 | 271,179 |
| Expenditures: | | | |
| - Administration | 45,674 | 46,869 | 46,924 |
| - Capital | 30,000 | 0 | 40,000 |
| - Maintenance | 10,000 | 6,205 | 12,500 |
| - Promotion & Advertising | 155,500 | 170,620 | 155,000 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 16,647 | 16,647 | 16,755 |
| Total Expenditures | 257,821 | 240,341 | 271,179 |
| Surplus/(Deficit) | 0 | 29,270 | 0 |

| Yonge-Lawrence Village BIA 2008 Budget Summary | | | |
|--|----------------------------|-----------------------------|--------------------------------|
| | 2007 Approved Budget | 2007 Projected Actual | 2008 Budget Request (\$) |
| Revenue: | | | |
| - Levy Funds Required (incl. 10% provision) | 161,150 | 161,150 | 182,707 |
| - Other Revenue | 8,000 | 9,675 | 6,500 |
| - Appeal Provision Surplus | 19,560 | 19,560 | 1,738 |
| - Contribution from Accumulated Surplus | 2,065 | 8,021 | 0 |
| Total Revenues | 190,775 | 198,406 | 190,945 |
| Expenditures: | | | |
| - Administration | 26,763 | 32,434 | 42,835 |
| - Capital | 30,750 | 26,772 | 10,500 |
| - Maintenance | 53,048 | 56,300 | 53,000 |
| - Promotion & Advertising | 65,564 | 68,250 | 68,000 |
| - 10% Provision for Assessment Appeal Reductions and Write-offs | 14,650 | 14,650 | 16,610 |
| Total Expenditures | 190,775 | 198,406 | 190,945 |
| Surplus/(Deficit) | 0 | 0 | 0 |

APPENDIX B

| Status of Business Improvement Area Budget Submissions | |
|---|--------------------------------|
| Business Improvement Area | Stage in Budget Process |
| Albion-Islington | |
| Bloor Annex | |
| Bloor by the Park | Included in this report |
| Bloor Street | |
| Bloor West Village | |
| Bloor-Yorkville | Included in this report |
| Bloorcourt Village | Included in this report |
| Bloordale Village | |
| Chinatown | |
| Church-Wellesley Village | |
| College Promenade | Included in this report |
| Corso Italia | Included in this report |
| Danforth Village | |
| Dovercourt Village | |
| Downtown Yonge | |
| Dundas West | Included in this report |
| Eglinton Hill | |
| Emery Village | |
| Fairbank Village | |
| Forest Hill Village | |
| Gerrard India Bazaar | Included in this report |
| Greektown on the Danforth | |
| Harbord Street | |
| Hillcrest Village | |
| Junction Gardens | Included in this report |
| Kennedy Road | |
| Knob Hill Plaza | |
| Korea Town | |
| Lakeshore Village | |
| Liberty Village | Included in this report |
| Little Italy | |
| Long Branch | |
| Mimico by the Lake | Included in this report |
| Mimico Village | |
| Mirvish Village | |
| Mount Dennis | |
| Old Cabbagetown | |
| Old Queen Street | |
| Pape Village | |
| Parkdale Village | Included in this report |

| | |
|-----------------------------------|-------------------------|
| Queens Quay Harbourfront | |
| Riverside District | Included in this report |
| Roncesvalles Village | |
| Rosedale Main Street | |
| St. Clair Avenue West | |
| St. Clair Gardens | |
| St. Lawrence Market Neighbourhood | |
| Sheppard East Village | Included in this report |
| The Beach | Included in this report |
| The Danforth | |
| The Eglinton Way | |
| The Kingsway | |
| Upper Village | |
| Uptown Yonge | Included in this report |
| Village of Islington | |
| West Queen West | Included in this report |
| Weston Village | |
| Wexford Heights | Included in this report |
| Wychwood Heights | |
| Yonge-Lawrence Village | Included in this report |
| York-Eglinton | |

SAN DIEGO CITY OF VILLAGES
CREATING SAFE AND VIBRANT PLACES TO SOCIALIZE

Draft

**Music
NOISE**



**Noise
MUSIC**

**September 12,
2002**

QUALITY OF LIFE

| | | | | | | | | | | | | |
|---------|-------|-----|---------------|----------|--------------|---------|---------|-------------------|-------|-----------|--------------|----------|
| TRANSIT | | | ENTERTAINMENT | | CONVERSATION | | | BUSINESS ACTIVITY | | | VENDORS | |
| Bus | Train | Car | Live | Recorded | Patio | Parking | Smokers | Deliveries | Trash | Equipment | Entertainers | Products |

Mixed use districts with higher concentration of residential units in retail and business districts precipitates a growth in dining and entertainment businesses for people seeking places to socialize. A number of factors combine to impact public health and safety and quality of life. One indicator of emerging conflicts is noise. Noise is simply the intersection between sound and the ears of someone who is disturbed by the sound. When there is no sound, there is no noise. When there is no person, there is no noise. When the sound is not disturbing there is no noise.

There are many variables as to when sound becomes noise – sound level, quality and quantity. Among the sources are transit vehicles, entertainment, conversation, business activity or street vendors or entertainers. Noise can be increased or decreased through various means including the movement of people to their vehicles, the path vehicles move, crowd location and size, proximity of the noise generating activity to people who may be disturbed, construction of the structure and schedule of activity. Often age of people or intoxication can be contributing factors.

VARIABLES

| | | | | | | | | | | |
|-----------------|--------------|---------|-------------|-----------------|------------------|-----------------|------------|-------------------|-------------------|--|
| PEDESTRIANS | | PEOPLE | | PROXIMITY | | STRUCTURE | | SCHEDULE | | |
| Pedestrian Flow | Parking Area | Signage | Taxi Stands | Outdoor Seating | Crowd Management | Entrance Lines | Promotions | Intoxication | Underage drinking | |
| | | | | Residents | | | | | | |
| | | | | Outlet Density | | | | | | |
| | | | | Outlet Type | | | | | | |
| | | | | Other Retail | | | | | | |
| | | | | Parking | | | | | | |
| | | | | | | Sound proofing | | | | |
| | | | | | | Windows | | | | |
| | | | | | | Entrance | | | | |
| | | | | | | Storage | | | | |
| | | | | | | Access (trucks) | | | | |
| | | | | | | | | Hours of business | | |
| | | | | | | | | Entertainment | | |
| | | | | | | | | Deliveries | | |
| | | | | | | | | Trash Removal | | |

CONFLICT RESOLUTION

Conflict resolution is the process of reducing or eliminating the sound, redefining the sound as to its source and purpose, or removing the person who is disturbed from the source of the sound. This is accomplished through communication, planning to reduce potential sources of noise or proximity of people to the noise generating activity.

QUANTITATIVE

The following are summaries of strategies used, typically through an ordinance, to regulate noise issues:

1. **Entertainment Overlay:** A district is designated as an entertainment district or “overlay” for the purpose of concentrating the number of establishments for the convenience of those visiting the area. Modifications are made to noise, parking, schedules and other zoning requirements to accommodate crowds and reduce impact on public health, safety and quality of life.
2. **Density:** The number of establishments providing entertainment or licensed to serve alcoholic beverages are limited based upon population or restricted by distance between such establishments.
 - a. **Consideration:** Using a “seating” basis rather than “outlet” basis for calculating density may provide more control over the number and types of businesses. A club with an occupancy capacity of 1,000 would have a greater potential impact on a neighborhood than 10 businesses with occupancy of 100.
3. **Proximity:** Businesses seeking to provide amplified music or use outdoor speakers (i.e. drive-up windows) are not permitted within a specified distance from a residential unit.
4. **Noise Levels:** The most common strategy is to regulate the level of decibels of amplified music an establishment can provide. Some cities allow a higher decibel level in a designated entertainment zone or “overlay” while others set a uniform standard when there are residential units in close proximity. Some focus on the more problematic bass or low frequency noise as a standard.
 - a. **Challenge:** Enforcement can be difficult if measurements are not taken at the actual time the person notices the noise or when noise levels in the area

QUALITATIVE

The following are summaries of strategies used to

1. **Parking:** Special arrangements are made to limit parking in residential areas to permit parking to prevent establishment patrons from parking close to residences.
2. **Pedestrians:** Pedestrian flow is regulated, especially during late hours, to keep people away from residential areas as much as possible.
3. **Traffic:** Automobile traffic is routed through commercial areas rather than residential neighborhoods during closing hours.
4. **Promotions:** Businesses are discouraged from advertising or using promotions that may increase the rate of intoxication of patrons.
5. **Communication:** Regular meetings held with club owners and managers, law enforcement, business district and residents to anticipate problems from special events, increased traffic or other sources of noise.
6. **Enforcement:** Active enforcement of ordinances.
7. **Education:** Organization of educational events for businesses to inform them of emerging issues or concerns and provide access to resources.
8. **Mediation:** A formal process to resolve conflicts between residents and businesses either through working with the business to take corrective action, clarify misunderstanding of each individuals rights and responsibilities or agreement to a mutually agreed upon settlement prior to further legal remedies.
9. **Disclosure:** A formal process of placing on notice residents, businesses, or developers of special conditions and responsibilities.

surrounding the establishment from traffic or other sources is higher than coming from the club.

5. **Building Codes:** New and existing buildings can be required to limit noise through the use of noise proofing materials, location of bedrooms relative to street and/or entertainment business, location of entertainment source in an establishment, location of outdoor seating and placement of speakers, use of sound walls and barriers, location of entrance and exit doors, use of double doors, restrictions on doors being opened during certain hours.

6. **Schedule:** Schedules can be regulated for entertainment, deliveries, trash removal, parking areas,

STRATEGY

| STAKEHOLDERS | ASSESSMENT | RECOMMENDATIONS | INTEGRATION | EDUCATION | MEDIATION |
|--|---|--|--|---|--|
| Alcohol Beverage Control BID's City Attorney Code Compliance Developers Development Services Environmental Services Fire Department Health Department Hospitality associations Planning Department Police Department Public Works Residential organizations | Current Codes: Other Cities: Community Forum: Issues and Trends <ul style="list-style-type: none"> ❖ Gaslamp ❖ Lajolla ❖ North Park ❖ Hillcrest ❖ Little Italy ❖ Pacific Beach ❖ Ocean Beach ❖ East Village | Revise Current Ordinances Create New Ordinances Develop Alternate Strategies | Develop a final reading with all key stakeholders to properly integrate focus, standards, enforcement, jurisdiction, and resolution. | Organize information into a concise resource directory for businesses, residents and developers. Include resource directory with disclosure agreements Incorporate information into Hospitality Business Orientation Organize annual Hospitality Roundtables to review status of compliance and areas needed for improvement | Develop a systematic process for mediating conflicts between residents and businesses or between businesses. Develop a process for remedial assistance for businesses engaged in practices causing conflicts or violations of ordinances. |