



Ottawa Street BIA  
**Commercial Market Assessment Update**

FINAL  
November 2018

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## EXECUTIVE SUMMARY

## Executive Summary

### Introduction

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

The process included:

- Review of movement into and through the BIA including visitation
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review including visitor profile
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and was reviewed with BIA members at an open workshop. The suggested recommendations in this report are based on the workshop findings.

### Ottawa Street BIA





## **SWOT**

### **Strengths**

- Strong mix of retail merchandise stores based in home improvement, fabric/sewing, antiques, home décor that still draw visitors from the long distances
- Growing strength in eating establishments that serve as both an amenity to the retail shopping as well as a destination in their own right (a growing nighttime experience economy)
- Growing list of other complementary type businesses
- Positive demographic changes to the local area population
- Very good infrastructure in terms of easy access, ample parking, high visibility, gateways, etc.

### **Weaknesses**

- Businesses are reliant on the regional visitation despite positive changes to the local neighbourhood
- The Cannon to Campbell segment is stronger than other segments of the street

### **Opportunities**

- An ideal time to rebrand the BIA as part of a renewed focus on the area
- Create new clusters of specialization that will have regional draw while maintaining core competencies in key home décor
- Increase goods and services for local residents and workers that matches neighbourhood gentrification
- Focus on Circular Economy as a growing trend in retail

### **Threats**

- Competition from other main streets



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

The following chart summarizes the changes in the recommendations for Ottawa St. BIA from 2009/2010 to the current study period of 2017/2018.

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

2009/2010 Suggested Recommendations	2017/2018 Status Update
Prepare to increase responsibilities and staffing to move the BIA to the next goal level	This is an opportune time for the Ottawa St. BIA to redefine the BIA organization, staffing, and mandate. The BIA will be moving offices in 2018. In addition, the recent staff and board changes will allow for a new direction to take hold. Work for the BIA should include a complete refresh to re-assess the mission statement, staffing and board procedures, number of board members, committees and task forces, and eventually brand positioning.
Evolve the retail strategy away from being very dependent on price sensitivities to include a greater emphasis on experiential aspects (learning, experiential, fun, social, etc.	The business mix in Ottawa St. BIA has shifted significantly towards more experiential aspects. The number and quality of restaurants has changed dramatically.
Begin to plan for further redevelopment on the south end of the BIA and select recruitment initiatives for missing businesses	The south end is a core concern for the BIA. Programs, marketing, events, etc. have all worked to increase pedestrian movement across the entire BIA.
Continue to work on transportation issues such as truck routes and improved turning lanes from Barton Street East	Progress has been made in terms of lowering speed limits along Ottawa St. BIA.
Develop plans for key catalyst property sites such as the Avon Theatre or the former Amity building	This is a work in progress.
Develop marketing programs to move from awareness campaigns to loyalty and advocacy	While there has been good PR in the past, the BIA acknowledges that this is something that they need to refocus as a priority.
Continue to work with HABIA and the City on programs that are beneficial to the BIA	HABIA has now changed to a Committee of Council and is called Business Improvement Area Coordinating Committee. Ottawa Street BIA continues to work with the City and other BIAs on supportive programs. However, many members feel that the current structure is not working for them for sharing information and resources.



## **Vision**

The Ottawa St. BIA vision from 2009/2010 was based on the following:

- Primarily focused on home décor
- Evolve into the experiential street to maintain the regional draw
- Increase consumer-related goods and services for local residents

However, as stated, this is an opportune time for the BIA to re-assess their internal procedures and BIA composition. At this time it would be important to develop a new mission statement and brand / identity structure to serve the street as it continues to evolve from home décor area to a more experiential offering.



## Ottawa St. BIA Action Plan

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

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

Each action item includes the following elements:

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

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

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



## Organization

### STRATEGIC GOAL

- Re-assess the BIA organization including staff, board members, and volunteers to carry out the programs along with mission statement, procedure manual, and eventually brand identity

### RATIONALE

The Ottawa St. BIA and the business district are both going through a significant change

A re-focus including an assessment of legacy procedures needs to be undertaken to ensure they match the focus for the main street and the direction of the BIA

### DESIRED RESULT

The consistency of organizational leadership that members can rely on for advocacy, internal communications, marketing, and to a limited extent economic development

### HOW TO ACCOMPLISH

The following chart highlights key suggested recommendations for the Ottawa St. BIA organization.

#### Organization Suggested Recommendations

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



<p>Review all BIA policies and procedures to ensure they align with the new vision, mission statement, and brand that will be developed</p>	<ul style="list-style-type: none"> <li>• Each month review each policy to ensure it reflects the vision and mission statement of the BIA</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure BIA has updated social media and procurement policies</li> <li>• Review and update these and other policies on a regular basis</li> </ul>	<p>BIA</p>	<p>Within one year</p>
<p>Partnerships</p>	<ul style="list-style-type: none"> <li>• Number of valuable partnerships</li> <li>• Review partnerships every six months to every year</li> </ul>	<ul style="list-style-type: none"> <li>• Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA</li> <li>• Prioritize partnerships based on current and future impact to the BIA (houses of worship, Centre on Barton including banks, social organizations such as YWCA, LRT, Hamilton Tourism, etc.)</li> </ul>	<p>BIA</p>	<p>Short to medium term</p>



<p>Review BIA boundaries</p>	<ul style="list-style-type: none"> <li>• Boundaries of BIA compared to area businesses</li> <li>• Potentially expand BIA to include all parking lots and entire Main/Ottawa St. intersection ahead of LRT</li> </ul>	<ul style="list-style-type: none"> <li>• Every two years, review boundaries and determine if changes are merited</li> <li>• BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Ottawa St. BIA, are business competitive or complementary, and pros/cons on BIA levy</li> </ul>	<p>BIA potentially in coordination with City Urban Renewal</p>	<p>Ongoing</p>
<p>Review the entire structure of the BIA including procedures, mission statement, committees, task forces, board structure, etc.</p>	<ul style="list-style-type: none"> <li>• Updated organization</li> </ul>	<ul style="list-style-type: none"> <li>• Systematically work to redevelop BIA organization suited to the new vision and aligned with new brand identity</li> </ul>	<p>BIA (may require outside assistance)</p>	<p>Short Term</p>
<p>Focus AGM and other meetings on positive learnings</p>	<ul style="list-style-type: none"> <li>• AGM participation and feedback process</li> </ul>	<ul style="list-style-type: none"> <li>• Set AGM agenda that focuses on learning, education, and positive changes</li> </ul>	<p>BIA</p>	<p>By next AGM</p>



		<p>happening in the BIA</p> <ul style="list-style-type: none"><li>• Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc.</li></ul>		
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## **Economic Development**

### **STRATEGIC GOAL**

- Create conditions for businesses to succeed in Ottawa St. BIA

### **RATIONALE**

- The BIA is not responsible for the individual success or failure of its member businesses but to provide the underlying conditions to allow businesses to potentially do well.

### **DESIRED IMPACT**

- A diverse mix of businesses based on clustered strengths that will continue to draw regional visitation
- Long terms businesses, low turnover
- Low vacancy rates

### **HOW TO ACCOMPLISH**

#### **Business Mix Types**

- Businesses that serve as an amenity to the regional shoppers and local area workers (e.g., breakfast, lunch, snacks, cafes, errand type shopping, etc.)
- Increased night time economy (early evening) in terms of quality restaurants with added entertainment (e.g., bands, comedy, art shows, charity events, fashion shows, etc.)
- Clusters of businesses whereby each individual business has a narrow and deep focus but collectively the businesses create regional draw
- Blurring on categories to create places to socialize, interact such as barbershop that serves beverages, bookstore/café, clothing stores and a coffee shop, specialty food merchants that sell home meal replacement and prepared foods, gyms that sell activewear and have cafes
- Businesses based on the Circular Economy – antiques, repurposing items, exchange, vintage clothing, rental (tools, home décor, fashion, sewing machines, etc.), tool shed incubator
- Greengrocer and specialty food merchants
- Pharmacy, specialized medicine and health, health supplements
- Cosmetics, beauty supply
- Specialty men's, women's, and children's clothing and accessories – family clothing stores



- Interior design and home furnishings (that complements what is already available) including more custom-made furniture and home furnishings
- Pet supply stores
- Fitness – yoga, dance, recreation
- Gift type stores
- Creative offices (e.g., marketing, advertising, architect, incubator startups)

### Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Business mix targets	<ul style="list-style-type: none"> <li>• Foodservice goals were to be 12%. In 2017 it was 19%</li> <li>• The vacancy was to be lowered</li> </ul>	<ul style="list-style-type: none"> <li>• Increased food services arise from blurred categories such as barber shops that serve alcohol, a greengrocer or specialized food store that sells prepared foods, clothing stores that have a coffee shop inside, etc.</li> <li>• Focus on recruitment should be on entrepreneurs rather than a specific category as these individuals will</li> </ul>	Private landowners are primarily responsible for leasing but the BIA can help direct and massage the mix through indirect methods	Ongoing



		<p>search out gaps in the marketplace</p> <ul style="list-style-type: none"> <li>• Increased retail merchandise that has a narrow and deep retail focus (highly specialized)</li> </ul>		
BIA to take an indirect approach to business recruitment	BIA target business mix	<ul style="list-style-type: none"> <li>• Publish wish list of businesses on BIA website</li> <li>• Communicate and share the list with local brokers and landowners</li> <li>• Provide BIA website linkages to other brokerage sites and vacancy listings</li> </ul>	BIA in coordination with brokers	Medium Term
Support select residential to commercial redevelopment especially south of Cannon St. E. This could include complete redevelopment to mixed-use buildings	<ul style="list-style-type: none"> <li>• Increase number of businesses</li> <li>• Increased pedestrian flow south of Cannon St. E.</li> </ul>	<ul style="list-style-type: none"> <li>• Selectively support increased residential to commercial or mixed-use redevelopment</li> <li>• BIA could support demand through financing mixed-use impact studies</li> <li>• Increased density near the planned</li> </ul>	BIA and property owners	Medium Term



		<p>LRT stations will be an important growth opportunity</p> <ul style="list-style-type: none"><li>• Potential to add more creative office space in the BIA should be pursued</li></ul>		
<p>Encourage continued use of grants and incentives and ensure buildings and public spaces are retail-oriented</p>	<ul style="list-style-type: none"><li>• Monitor grant and incentive usage</li></ul>	<ul style="list-style-type: none"><li>• Continue to monitor usage of grants and incentives</li><li>• Have City of Hamilton staff conduct education programs on new incentives and how to apply for them</li><li>• Encourage retail friendly business design</li></ul>	<p>BIA and Urban Renewal</p>	<p>Ongoing</p>



## **Physical Improvements and Programs for Enjoyable Shopping**

### **STRATEGIC GOAL**

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

### **RATIONALE**

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

### **DESIRED IMPACT**

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

### **HOW TO ACCOMPLISH**

- Parking
- Hours of Operation
- Gateways
- Patios
- Multifunctional Street Art and Amenity
- Proper Use of Lighting
- Outdoor Merchandising
- Physical Improvement Suggested Recommendations



Specific	Measurable	Actionable	Responsibility	Time Frame
Any streetscape plans must be vetted through the lens of economic development	A required step in any streetscape changes	<ul style="list-style-type: none"> <li>Develop a protocol whereby streetscape changes are vetted through the lens of potential positive impacts on area businesses including trade-offs</li> </ul>	City of Hamilton and BIA	Long Term
Review parking needs in light of patio program, on-street needs, changes to technology for paying, monitoring, and enforcement	<ul style="list-style-type: none"> <li>Measure the effect of losing one parking space on visitation, total parking revenue collected, and impact on sales of businesses using the parking space</li> </ul>	<ul style="list-style-type: none"> <li>Test pilot parking patio program to determine if it is a net positive for the Ottawa St. BIA (were sales increase for some businesses sufficient to offset potential loss to other businesses)</li> <li>As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones</li> </ul>	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> <li>Patio administration program for Ottawa St. BIA is completed               <ul style="list-style-type: none"> <li>BIA should meet with Parking and Transportation on an annual basis to review changes to parking and loading</li> </ul> </li> </ul>



<p>Review physical and digital wayfinding</p>	<ul style="list-style-type: none"> <li>• Increased visitation</li> <li>• Reduced wayfinding complaints</li> </ul>	<ul style="list-style-type: none"> <li>• Review with City location of wayfinding signage and determine ways to increase signage to Ottawa St. BIA</li> <li>• Constantly update any digital wayfinding elements</li> </ul>	<p>BIA and City</p>	<p>Review annually</p>
<p>Review lighting in terms of safety and creating an overall experience especially as the night time economy increases</p>	<ul style="list-style-type: none"> <li>• Lighting matches goals of BIA</li> </ul>	<ul style="list-style-type: none"> <li>• Work with City staff and ward councillors to ensure that lighting program matches goals and objectives of the BIA members in terms of safety, retail merchandise window displays, patio dining, and the growing night time economy</li> </ul>	<p>BIA and City of Hamilton</p>	<p>One year</p>
<p>Continue to work to enhance the Ottawa St. Farmers' Market including development of permanent stalls</p>	<ul style="list-style-type: none"> <li>• Ensure vendors and retailers have input into the design</li> </ul>	<ul style="list-style-type: none"> <li>• Work with the City on the farmers' market stall and parking redevelopment</li> </ul>	<p>City and BIA</p>	<p>One to two years</p>



## **Marketing STRATEGIES**

- Renew or redevelop the Ottawa St. BIA brand, vision statement, and mission statement to reflect the changes in direction for the BIA and the future prospects for the main street.
- Use resources to tell the brand story and get the word out about the new direction.

## **RATIONALE**

- Ottawa St. BIA is a changing and evolving main street that has shifted from a focus on home décor, to fashion/food/finds, to a new direction.
- The BIA and the tools it uses to promote itself internally and externally need to reflect that momentum.
- There is work required to bring BIA members onboard and buy into the new direction and embrace the change.

## **DESIRED IMPACT**

- One consistent, focused brand story that will get member buy-in, attract local and regional visitation, and attract entrepreneurs and investors.

## **HOW IT GETS DONE**

- Develop renewed brand, vision statement, and mission statement.
- Continue to focus on regional visitation as the primary focus for marketing including increased PR campaigns.
- Bring in elements of guerilla marketing required for infrequent regional visitors to encourage longer dwell times, increased interaction on the street, and higher sales (e.g., outdoor displays, use of parking patio projects for eating establishments as well as other pop up, develop a pop up retail program, encourage retailers to have sample trays on the street to interact with passing traffic, improve wayfinding signage, event signage, and parking signage).
- Review events in light of the new brand, vision, and mission statement as part of a calendar of events program.
- Consider Free Wi-Fi as part of a loyalty marketing program that will allow the BIA to market directly to those who access the free program.
- BIA is currently producing a video for the street to highlight businesses that can be used across multiple platforms.



### Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Strategic branding exercise	<ul style="list-style-type: none"><li>Completed brand positioning</li></ul>	<ul style="list-style-type: none"><li>The result would be a careful synthesis of strategic thinking about your community, your brand and your targets mapped against your business objectives. As well as consideration for what will be differentiating, engaging and motivating for the future</li></ul>	<ul style="list-style-type: none"><li>BIA and partner agency</li></ul>	<ul style="list-style-type: none"><li>Immediately</li></ul>
Key Messaging Hierarchy	<ul style="list-style-type: none"><li></li></ul>	<ul style="list-style-type: none"><li>A matrix which links key messages to your Promise, Benefits, and Positioning and expresses your brand position</li><li>Individual messages for each of your separate target groups</li></ul>	BIA	<ul style="list-style-type: none"><li>Short Term</li></ul>



Brand identity creation	<ul style="list-style-type: none"><li>• Brand guidelines</li></ul>	<ul style="list-style-type: none"><li>• Strategy and partner agency team/creative team develop the new identity (logo, symbols, colour palette etc.) and tagline options based on the approved strategic direction. This would include identity options that link to the identified assets and differentiators of the BIA</li></ul>	<ul style="list-style-type: none"><li>• BIA and partner agency</li></ul>	<ul style="list-style-type: none"><li>• Short term</li></ul>
Brand communication toolkit development	<ul style="list-style-type: none"><li>• Toolkit</li></ul>	<ul style="list-style-type: none"><li>• The agency/creative team creates application guides and templates for brand communication. A document &amp; digital format guide for use by and for all future marketing communications</li></ul>	<ul style="list-style-type: none"><li>• BIA and partner agency</li></ul>	<ul style="list-style-type: none"><li>• Short term</li></ul>



## **BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS**

## 1.0 Introduction

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

The process included:

- Review of movement into and through the BIA including visitation
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and councillors
- Trade area review including visitor profile
- Review of development applications, building permits, and investment in the BIA
- Summary of incentives and grants

This above listed information was compiled in this background report and was reviewed with BIA members at an open workshop. The suggested recommendations in this report are based on the workshop findings.

### Ottawa Street BIA





## 2.0 Visitors to Ottawa Street BIA

To understand the commercial market opportunities in Ottawa Street BIA a review of visitor movement. This included five major reviews:

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

## 2.1 Vehicular and Pedestrian Movement Along Ottawa Street North

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

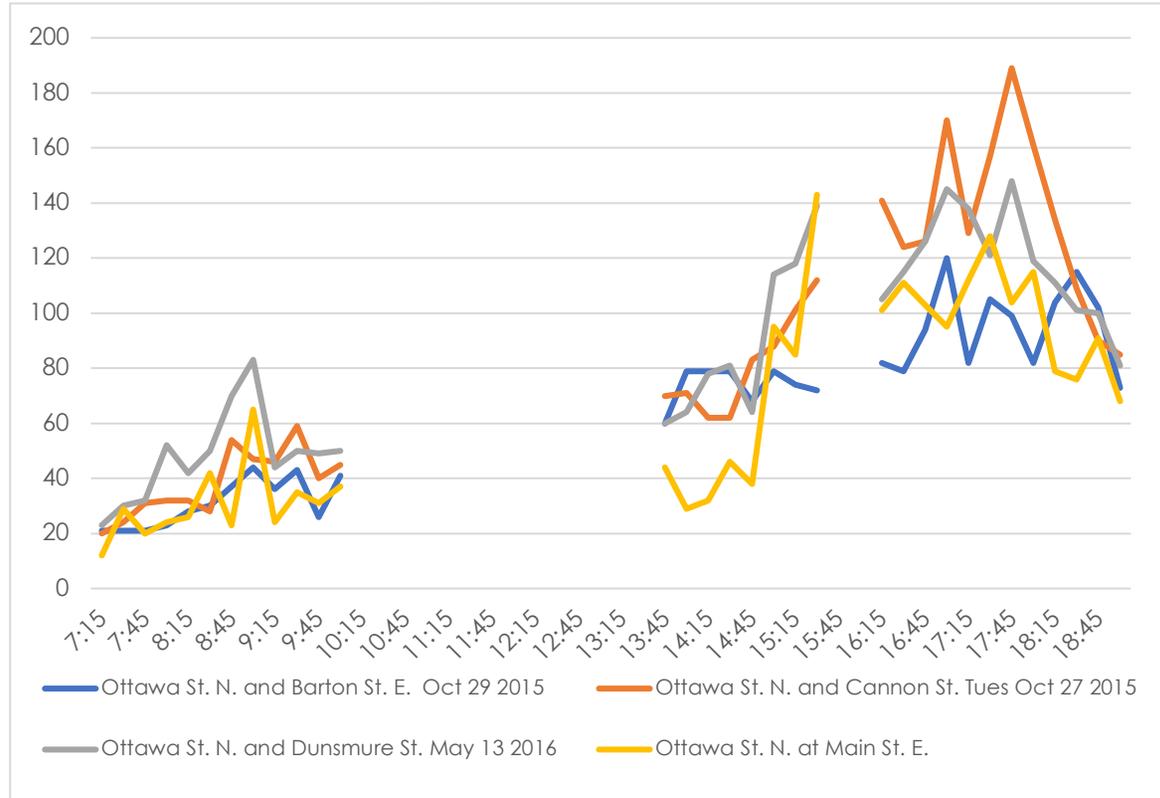
<b>Intersection</b>	<b>Date</b>	<b>8-hour Vehicular Count</b>	<b>8-Hour Pedestrian Count</b>
Ottawa St. N. and Main St. E.	Thur. Nov. 30 2017	18,224	1,560
Ottawa St. N. and Cannon St.	Tues. Oct. 27 2015	9,192	687
Ottawa St. N. and Dunsmure St.	Fri. May 13 2016	6,613	1,017
Ottawa St. N. and Barton St. E.	Thur. Oct. 29 2015	13,056	1,122

Source: City of Hamilton

Focusing on movement directly on Ottawa St. N. the following graph illustrates vehicular traffic throughout the day from Barton St. E. and Main St. E.

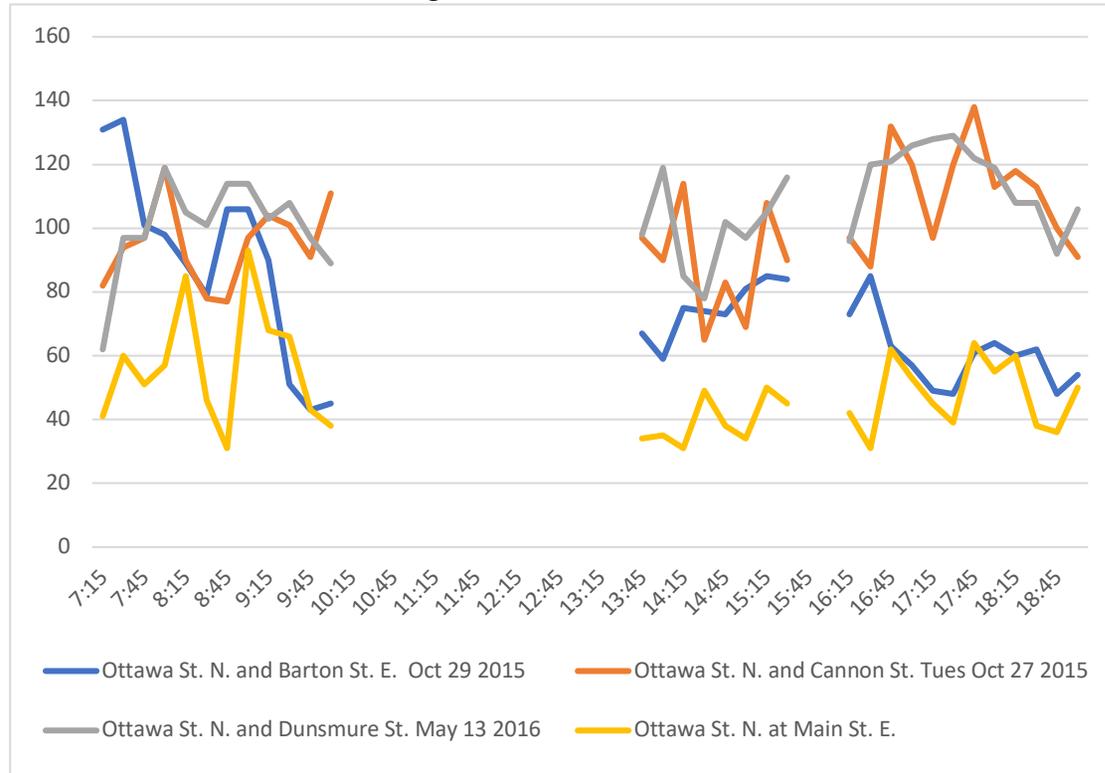


### Vehicular Traffic Patterns along Ottawa St. N.: Southbound



Source: City of Hamilton

## Vehicular Traffic Patterns along Ottawa St. N.: Northbound



Source: City of Hamilton

### Findings for Ottawa St. N.

- Northbound traffic is higher than southbound traffic.
- Southbound traffic builds throughout the day. It peaks just after 5:00 pm.
- Southbound traffic builds south of Cannon St. to Dunsmore St.
- Northbound traffic varies dramatically throughout the day. North of Cannon, traffic is high and constant throughout the entire day.
- There is a spike early morning for traffic flowing north of Barton St. E. associated with shift work commuting patterns.
- Ottawa St. N. and Main St. E. have the lowest traffic throughout the day.
- Northbound at Cannon St. and Dunsmore St. is the highest vehicular volumes.



### **Implications for Ottawa Street BIA**

- Traffic from Cannon St. and Dunsmuir St. along Ottawa St. N. is the highest southbound and northbound. Traffic is relatively constant throughout the entire day from 7 am to 7 pm.
- There may be an opportunity to take advantage of the late afternoon and early evening commute traffic for people stopping by for quick errands, food items, etc.



## 2.2 On-Street Parking

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

### On-Street Parking Meter Revenue

Year	Total On-Street Parking Revenue	Number of On-Street Meters	Revenue Per Meter
2012	\$89,757.28	105	\$855
2013	\$93,070.50	105	\$886
2014	\$91,041.23	106	\$859
2015	\$96,879.41	106	\$914
2016	\$96,904.40	106	\$914

Source: City of Hamilton

\*Note parking meter increased in June 2017 from \$1.00 to \$1.50

### Findings

- There is a free parking program during a 30 day period that straddles between November and December.
- Generally, parking meter revenue per meter had been increasing until 2015. From 2015 and 2016 revenue per meter remained unchanged. Each parking spot is used over 3.2 hours per day which is relatively good usage.

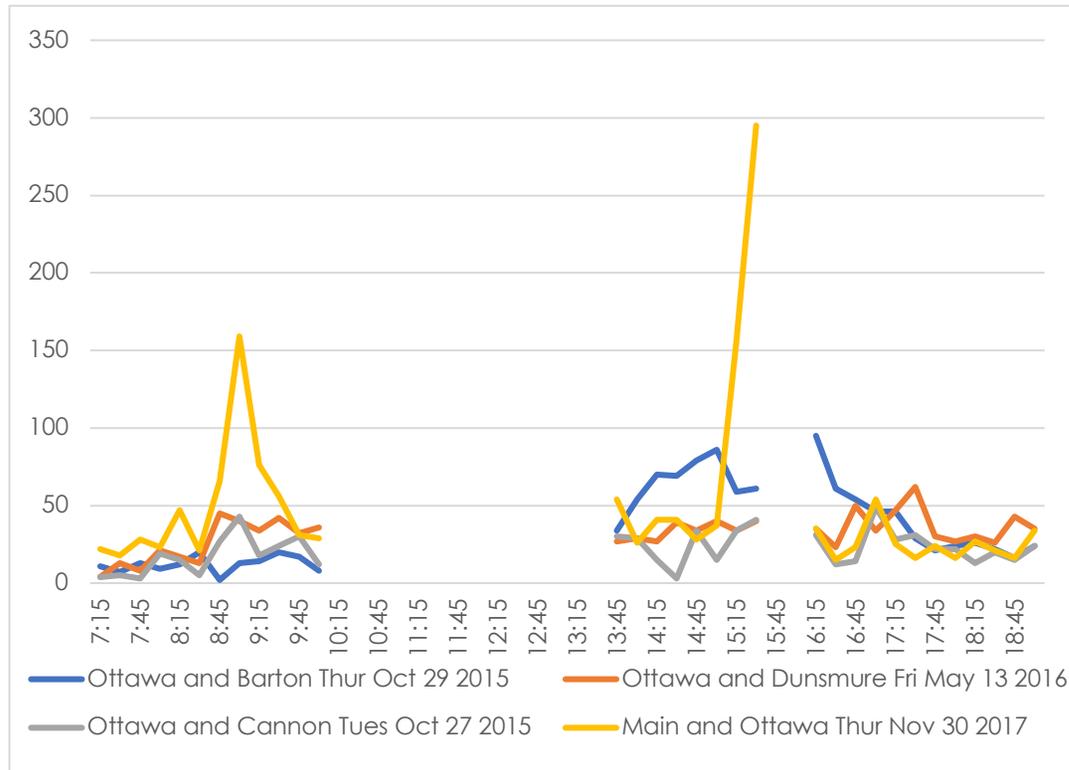
### Implications for Ottawa Street BIA

- Ottawa Street businesses rely on a combination of local residents and regional visitation. Generally, visitation had been increasing however in 2016 it appears to have stalled.
- Regional visitors should be encouraged to use the long-term lots located behind the businesses.
- This would allow the on-street parking to be freed up for local residents to use for quick errands.
- The proposed streetscaping plan would result in the loss of some on-street parking. In addition, the reconfiguration of the Ottawa St. Farmers' Market will affect a limited number of off-street parking spaces.
- According to the City of Hamilton, mobile payment for parking and credit card payment at off-street lots should be able to be rolled out in 2018/2019. BIAs should look for increased education and marketing of these services in relation to their customers and visitation. Further advances include on-line payment for permit parking spaces.

## 2.3 Pedestrian Traffic

Average pedestrian traffic at the four major intersections along Ottawa St. N. varies. There are spikes at the edges of the BIA on Main St. E. and Barton St. E.

### Ottawa St. N. Pedestrian Counts – 15 Minute Intervals



Source: City of Hamilton

### Findings

- Pedestrian traffic along Ottawa St. N. generally fluctuates around 25 to 50 every 15 minutes (100 to 200 people per hour).



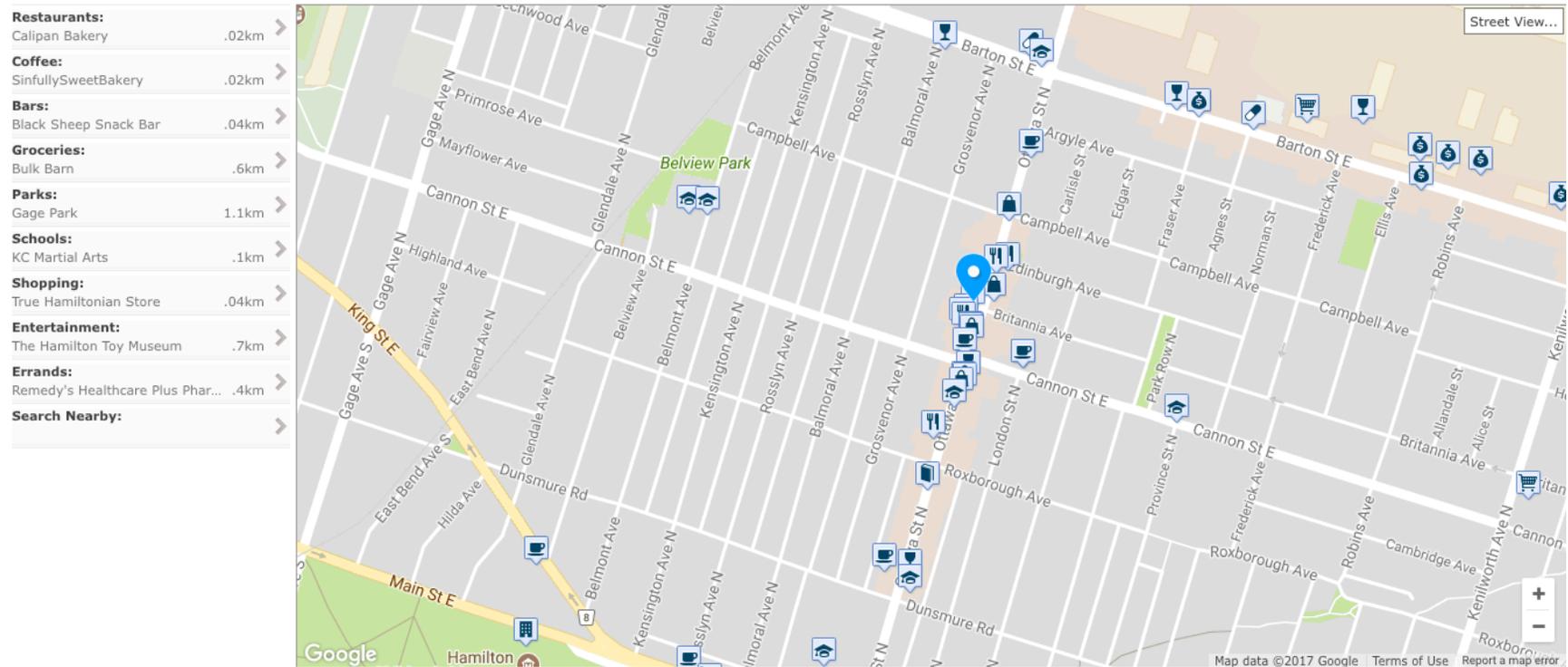
- The recent count in 2017 for Ottawa St. N. and Main St. E. has a morning commute spike and a late afternoon spike. The two spikes are associated with the nearby school.
- Otherwise there are no noticeable spikes during the day.
- According to Walk Score, the address 207 Ottawa St. N., has a Walk Score of 83 and a Transit Score of 60. Ottawa Street achieves a good Walk Score because it is very accessible to a range of goods and services including cafes and restaurants, shopping, specialty food but is limited in terms of access to larger grocery stores and items, libraries, and activities by foot. It is more difficult to access activities via transit.

#### **Implications for Ottawa St. BIA**

- Encouraging pedestrian flow along the entire BIA from north to south is a key priority.

## Ottawa Street BIA Walk Score – Nearby Amenities

### What's Nearby



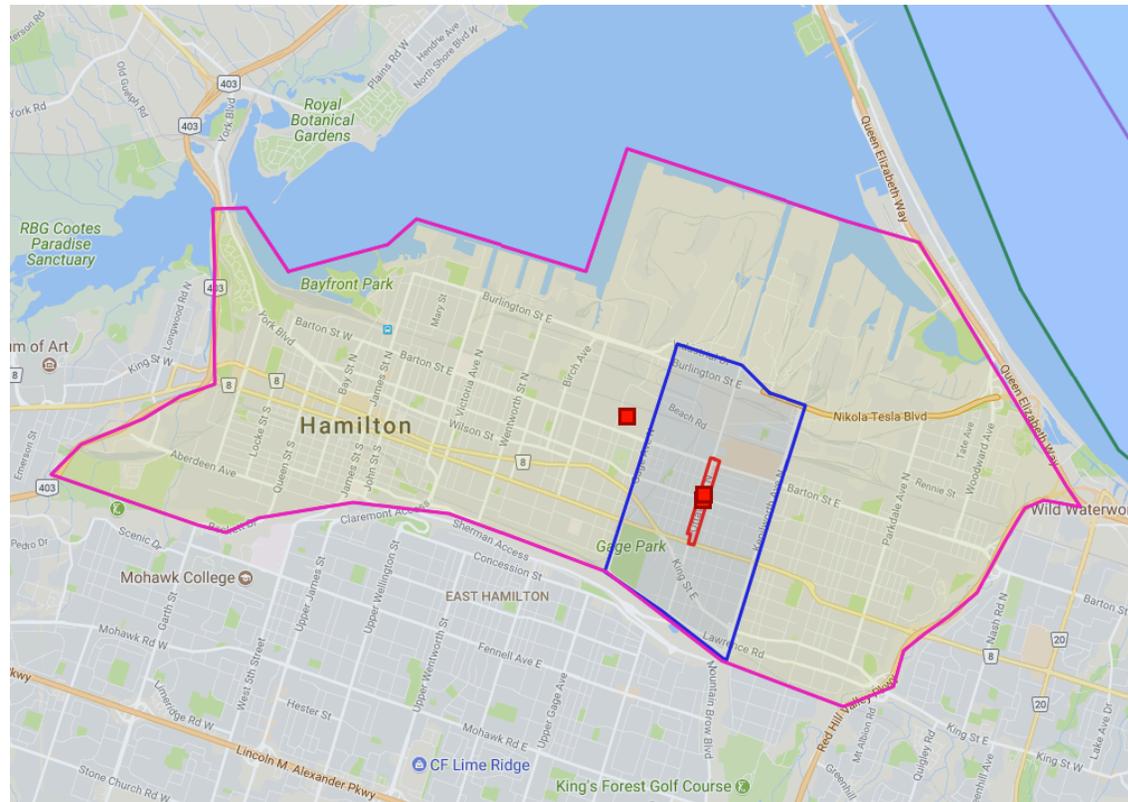
### Implications for Ottawa Street BIA

- From a shopping perspective, there are ample goods and services nearby including the Centre on Barton for banking, grocery, and general merchandise items. Ottawa St. N. lacks some neighbourhood functions such as a library, community centre, parks, entertainment, and other recreational type event space that would naturally create more pedestrian traffic/volume.

### 3.0 Trade Area Analysis

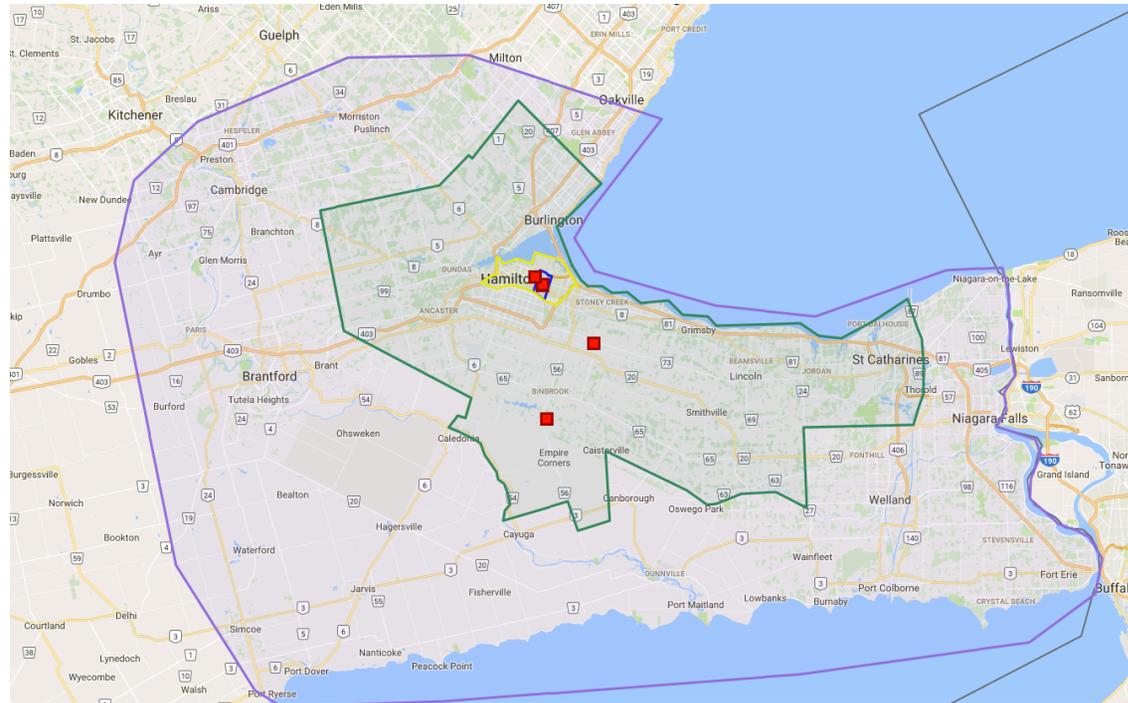
The trade areas for Ottawa Street BIA were established in the previous Commercial Market Assessment reports. They focused on the immediate area of Crown Point neighbourhood as well as the Lower City of Hamilton. In addition, the regional draw of Ottawa St. BIA extends quite far into the Niagara Region, Brantford, and Halton Region.

#### Ottawa Street BIA Trade Areas – Zoomed In





## Ottawa Street BIA Trade Areas – Zoomed Out





Trade areas include:

- Ottawa Street BIA
- Crown Point neighbourhood
- Lower City
- Primary Trade Area: Hamilton, Burlington, Grimsby, St. Catharines, and areas to the south of the City of Hamilton
- Secondary Trade Area: Primary Trade Area as well as Niagara on the Lake, Niagara Falls, Fort Erie, north shore of Lake Erie, Brantford, Cambridge, and surrounding areas
- City of Hamilton

### **Population, Households, and Daytime Workers**

	<b>Ottawa St. BIA</b>	<b>Crown Point</b>	<b>Lower City</b>	<b>Primary Trade Area</b>	<b>Secondary Trade Area</b>	<b>City of Hamilton</b>
2011 Population	830	19,528	130,931	923,004	1,791,872	519,950
2016 Population	843	19,633	132,770	957,253	1,875,415	566,276
Annualized Population Growth Rate	0.3%	0.1%	0.3%	0.7%	0.9%	4.7%
201 Households	394	8,295	62,011	383,013	728,515	223,175
Annualized Household Growth Rate	0.5%	0.3%	0.5%	0.9%	1.0%	4.8%
Daytime Worker Population	281	8,541	98,985	427,442	840,180	238,346

Source: Statistics Canada, Environics Estimates 2017

### **Findings**

- Within the BIA, there is a small but not insignificant population.
- Within the Crown Point neighbourhood surrounding Ottawa St. BIA there is a sizeable population of approximately 20,000 residents.
- There has been positive population growth in Crown Point and the Lower City.
- Household growth is faster than population growth suggesting that the areas are still transitioning. Older families are moving out but newer families haven't established new roots yet.

From an LRT perspective, the 5 and 10 minute walking distance from Main St. E. and Ottawa St. (station) is:



### **Current LRT Station Population**

	400 m (5 Minute Walking Distance)	800 m (10 Minute Walking Distance)
Ottawa LRT Station (Main St. and Ottawa St.	2,646	10,326

Source: Statistics Canada

### **Findings LRT Station Population**

- The 5 minute walking distance population is a good base but the local population needs to increase significantly to enhance the local shopping characteristic of an LRT station. The 10 minute walking distance population is relatively high.
- The 5 minute walking distance population should aim for 6,000 to 7,000 residents.



## Age Profile, Gender, and Ethnicity

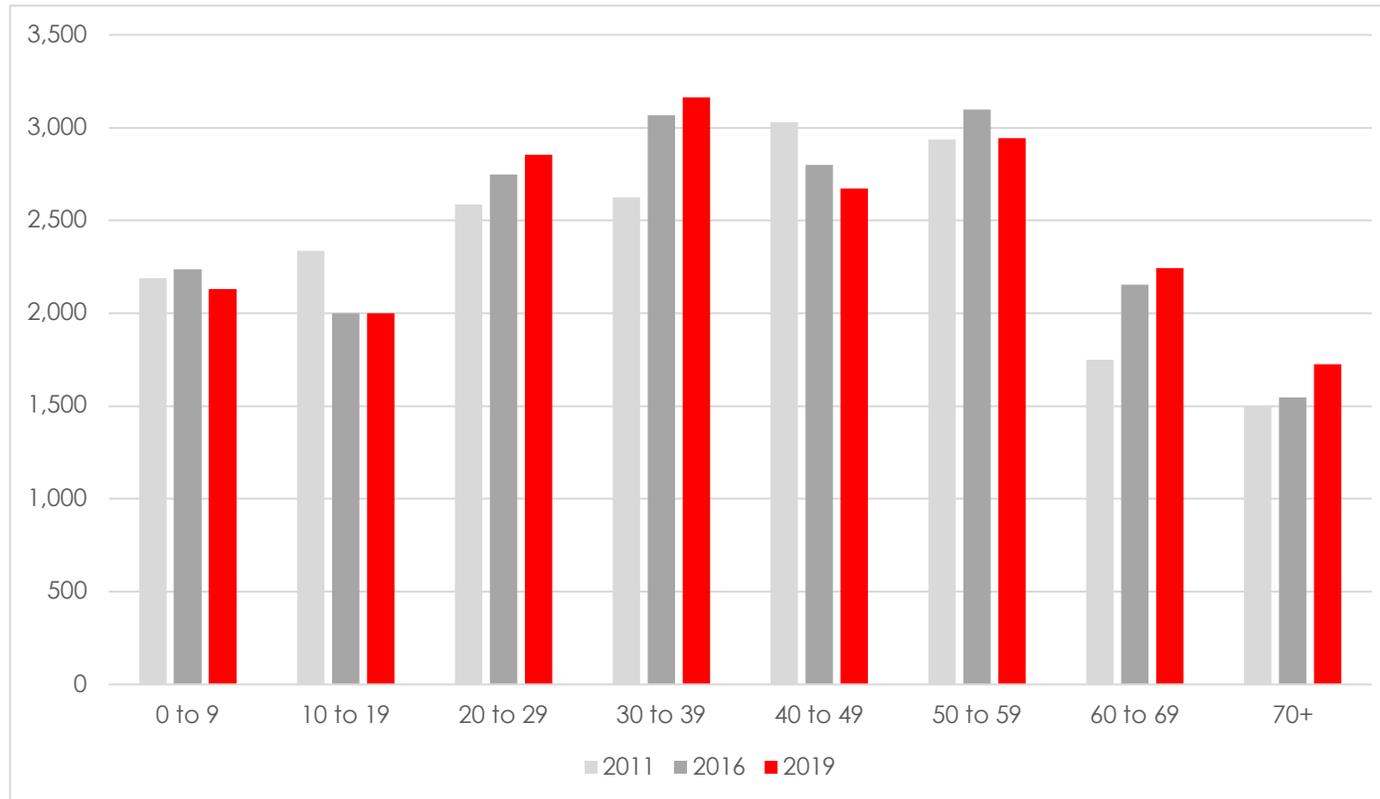
	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Age Profile</b>						
0 to 9	9%	12%	10%	10%	11%	10%
10 to 19	11%	11%	9%	12%	12%	11%
20 to 29	14%	13%	16%	13%	12%	14%
30 to 39	18%	15%	15%	12%	12%	12%
40 to 49	12%	14%	13%	13%	13%	15%
50 to 59	15%	16%	16%	15%	15%	14%
60 to 69	11%	11%	11%	12%	12%	10%
70+	9%	7%	9%	12%	12%	12%
Median Age	38.6	39.5	39.6	42.3	42.4	41.6
<b>Gender</b>						
Male	51%	50%	50%	49%	49%	49%
Female	49%	50%	50%	51%	51%	51%
<b>Ethnicity</b>						
Visible Minority	8%	10%	19%	16%	16%	19%
1st Generation Canadian	13%	13%	24%	24%	23%	26%
2nd Generation Canadian	15%	20%	22%	25%	24%	25%
3rd Generation Canadian +	74%	67%	54%	51%	53%	49%

Source: Statistics Canada 2016

### Findings

- Within the Crown Point trade area, the age profile skews younger. 23% of the population is under 20 years of age. A further 28% are 20 to 39 years of age.
- There is a slightly higher proportion of 50 to 59 year olds compared to the City of Hamilton.
- There is a relatively even split between male and female residents.
- There is a relatively low proportion of visible minorities and the majority of residents are third generation Canadian or higher. Elsewhere in the Lower City, there is a higher proportion of visible minorities and first generation Canadians.

## Change in Crown Point Neighbourhood Population – 2011 to 2016



Source: Statistics Canada Census 2011, 2016, Environics Estimates 2019

### Findings

- In 2016, there was a continued shift in the aging seniors population however, the dominant age segments and growth are in the young adults and young children cohorts.
- The estimates for 2019, still have a growing seniors population but more emphasis is on the active 60 to 69 year olds.
- By 2019, young adults from 20 to 39 will be the largest segment of the population.



## Household Size and Marital Status

	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Household Size</b>						
1 Person	32%	30%	42%	28%	26%	28%
2 Person	34%	33%	31%	33%	34%	32%
3 Person	19%	17%	13%	16%	16%	16%
4 + Person	14%	20%	15%	24%	25%	24%
Persons Per Household	2.2	2.3	2.1	2.5	2.5	2.5
<b>Marital Status</b>						
Single	32%	33%	36%	28%	26%	29%
Married, Common Law	52%	49%	44%	56%	58%	55%
Separated, Divorced, Widowed	16%	18%	20%	16%	16%	16%

Source: Statistics Canada 2016

### Findings

- Household sizes tend to be slightly larger than elsewhere in the Lower City. This includes young children as well as older children and multi-generational families living together.



## Education, Occupation, and Home Ownership

	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Education</b>						
Less than High School	34%	28%	26%	18%	18%	20%
High School Graduate	27%	32%	29%	28%	29%	28%
College, Diploma	30%	29%	26%	30%	28%	30%
University Graduate	9%	11%	19%	24%	25%	22%
<b>Occupation</b>						
Management	12%	19%	20%	25%	26%	24%
Science	6%	4%	5%	6%	6%	6%
Health	2%	5%	7%	7%	7%	8%
Govt, Ed., Social Services	6%	9%	11%	12%	11%	12%
Arts, Culture, Recreation	0%	2%	4%	3%	3%	3%
Sales and Service	37%	28%	27%	24%	24%	24%
Other	30%	28%	25%	20%	22%	23%
Labour Force Participation	71%	64%	61%	64%	65%	64%
<b>Housing Tenure</b>						
Own	73%	72%	46%	70%	73%	68%
Rent	27%	28%	54%	30%	27%	32%

Source: Statistics Canada 2016

### Findings

- There is a high proportion of sales and service as well as blue collar workers in Crown Point that support the local manufacturing, trades, transport, utilities based employment nearby and the nearby shopping centre and retail areas.
- There is also a sizeable proportion of residents employed in management and administration type occupations who live in Crown Point.
- A very high proportion of residents own their own home.



## Travel to Work

	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Travel to Work (15 yr +)</b>						
Vehicle - Driver or Passenger	74%	75%	68%	85%	87%	83%
Public Transit	17%	15%	19%	9%	7%	10%
Walk	6%	6%	10%	4%	4%	5%
Bike	2%	2%	2%	1%	1%	1%
Other	2%	1%	1%	1%	1%	1%

Source: Statistics Canada 2016

## Findings

- Over three-quarters of local Crown Point residents drive themselves or are driven to work.
- 15% of working age residents take public transit to work. This is less than the average for the entire Lower City.



## Household Income

	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Household Income</b>						
< \$20,000	17%	14%	20%	9%	7%	9%
\$20,000 to \$39,999	24%	21%	25%	16%	16%	17%
\$40,000 to \$59,999	20%	20%	19%	16%	16%	16%
\$60,000 to \$79,999	16%	16%	13%	13%	14%	13%
\$80,000 to \$99,999	14%	12%	9%	11%	12%	11%
\$100,000 to \$149,999	12%	14%	11%	19%	19%	18%
\$150,000 to \$200,000	3%	4%	3%	9%	9%	8%
\$200,000 +	0%	1%	2%	7%	8%	6%
Average Household Income	\$60,649	\$65,980	\$58,986	\$92,204	\$96,470	\$88,151
Real Annualized Growth in Household Income	0.9%	0.8%	0.7%	0.7%	0.7%	1.0%

Source: Statistics Canada 2016

### Findings

- Average household incomes in Crown Point are higher than elsewhere in the Lower City.
- There is positive momentum in terms of good growth in real household incomes (excluding inflation).
- There are pockets of lower household income but approximately 19% of households earn more than \$100,000 annually.



### **3.1 New Developments**

#### **Findings**

- YWCA redevelopment is one of the major initiatives on the street.



### 3.2 Household Expenditure

#### Household Expenditure

	Ottawa St. BIA	Crown Point	Lower City	Primary Trade Area	Secondary Trade Area	City of Hamilton
<b>Local Serving Retail</b>						
Food Purchased from Stores	\$6,663	\$6,636	\$5,610	\$8,185	\$8,362	\$8,231
Alcohol Purchased from Stores	\$1,268	\$1,373	\$1,149	\$1,622	\$1,673	\$1,447
Health Care Related Retail	\$2,129	\$2,077	\$1,955	\$2,812	\$2,871	\$2,737
<b>Food Services</b>						
Restaurant dinners	\$1,421	\$1,529	\$1,361	\$2,019	\$2,028	\$2,190
Restaurant lunches	\$563	\$624	\$557	\$840	\$914	\$1,080
Restaurant breakfasts	\$258	\$246	\$225	\$295	\$286	\$374
Restaurant snacks and beverages	\$489	\$505	\$440	\$552	\$546	\$600
Alcohol Served on Premises	\$394	\$672	\$584	\$917	\$911	\$583
<b>Retail Merchandise</b>						
Women's Clothing and Accessories	\$1,370	\$1,425	\$1,266	\$2,073	\$2,103	\$1,898
Men's Clothing and Accessories	\$789	\$812	\$709	\$1,098	\$1,187	\$1,109
Children's Clothing and Accessories	\$55	\$65	\$53	\$61	\$74	\$61
Clothing as Gifts	\$58	\$58	\$55	\$81	\$80	\$586
Home Furnishings	\$792	\$858	\$826	\$1,386	\$1,478	\$1,184
Appliances and Electronics	\$630	\$695	\$543	\$935	\$1,020	\$545
Leisure Retail (Sporting Good, Books, Music)	\$572	\$672	\$584	\$917	\$911	\$667
Pet Supplies	\$621	\$650	\$499	\$730	\$751	\$391
Florist, Nursery, Greenhouse Stock	\$362	\$346	\$271	\$473	\$435	\$258
Home Improvement Retail	\$240	\$304	\$194	\$437	\$413	\$195



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**Services**

Packaged Travel	\$382	\$421	\$324	\$849	\$929	\$368
Clothing - Laundromat, Dry Cleaning, Tailor	\$65	\$61	\$102	\$121	\$127	\$24
Recreation Memberships	\$273	\$318	\$254	\$511	\$532	\$289
Movies	\$86	\$92	\$79	\$92	\$91	\$60
Live Sporting Events	\$23	\$49	\$37	\$79	\$72	\$23
Live Performing Arts	\$41	\$84	\$71	\$146	\$136	\$89
Personal Care Services	\$607	\$652	\$587	\$1,034	\$1,080	\$705

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Source: Statistics Canada 2016



## **Findings**

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

- Clothing services – laundromat, dry cleaning, tailor
- Children's clothing and accessories
- Alcohol served on premises
- Snacks and beverages
- Pet food and supplies
- Alcohol purchased from stores
- Food from stores
- Breakfast
- Dinner
- Lunch
- Clothing as gifts
- Men's clothing and accessories

## **Implications for Ottawa Street BIA**

- A transitioning population is focused on buying goods and services for the new children to the neighbourhood.
- Households eat out more for all meals including snacks, beverages, and drinking.
- Households new and old spend more on their pets.
- Larger families tend to spend more than average on grocery store items.
- The growing professional workforce living in the area need work clothing.



### 3.3 Other Major Target Markets

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

- Laidlaw United Church
- Workers in the BIA and nearby
- Ottawa Farmers' Market

It is difficult for Ottawa St. BIA to build off of traffic from the Centre on Barton including Walmart. There is a bit of cross over from the adjacent banks.

#### Key Findings

- Employment as measured within the Ottawa Street BIA boundary includes a mix of retail oriented employment and office, and entertainment/recreation employment. There were 585 employees in 2016.
- Overall, employment has been increasing to 2015.
- According to Statistics Canada and Environics estimates, there are approximately 154 workers in the Ottawa Street BIA area. Within the Ottawa Street Primary Trade Area there are 17,086 workers (Source: Statistics Canada, Environics Estimates). This would be primarily retail based employment near Nicola Tesla Blvd including manufacturing, transport, trades, warehousing etc. The Centre on Barton Shopping Centre is a secondary major employment node.
- Retail based employment per business is relatively high and growing. The entertainment employment fell in 2016.

#### Ottawa Street BIA Employment

Employment Sector	2013	2014	2015	2016
Shopping, Services, Repairs, Servicing and Rentals	366	371	384	435
Office	44	46	33	60
Entertainment and Recreation	5	105	110	55
Institutional	53	57	58	25
Manufacturing, Resource	20	19	16	15
No Perceived Activity (vacant)	0	0	0	0
Residential	0	0	0	0
Terminal, Storage, Transport, Communications	0	0	0	0
<b>Total</b>	<b>488</b>	<b>598</b>	<b>601</b>	<b>585</b>

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



## **Findings**

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

## **Implications for Ottawa Street BIA**

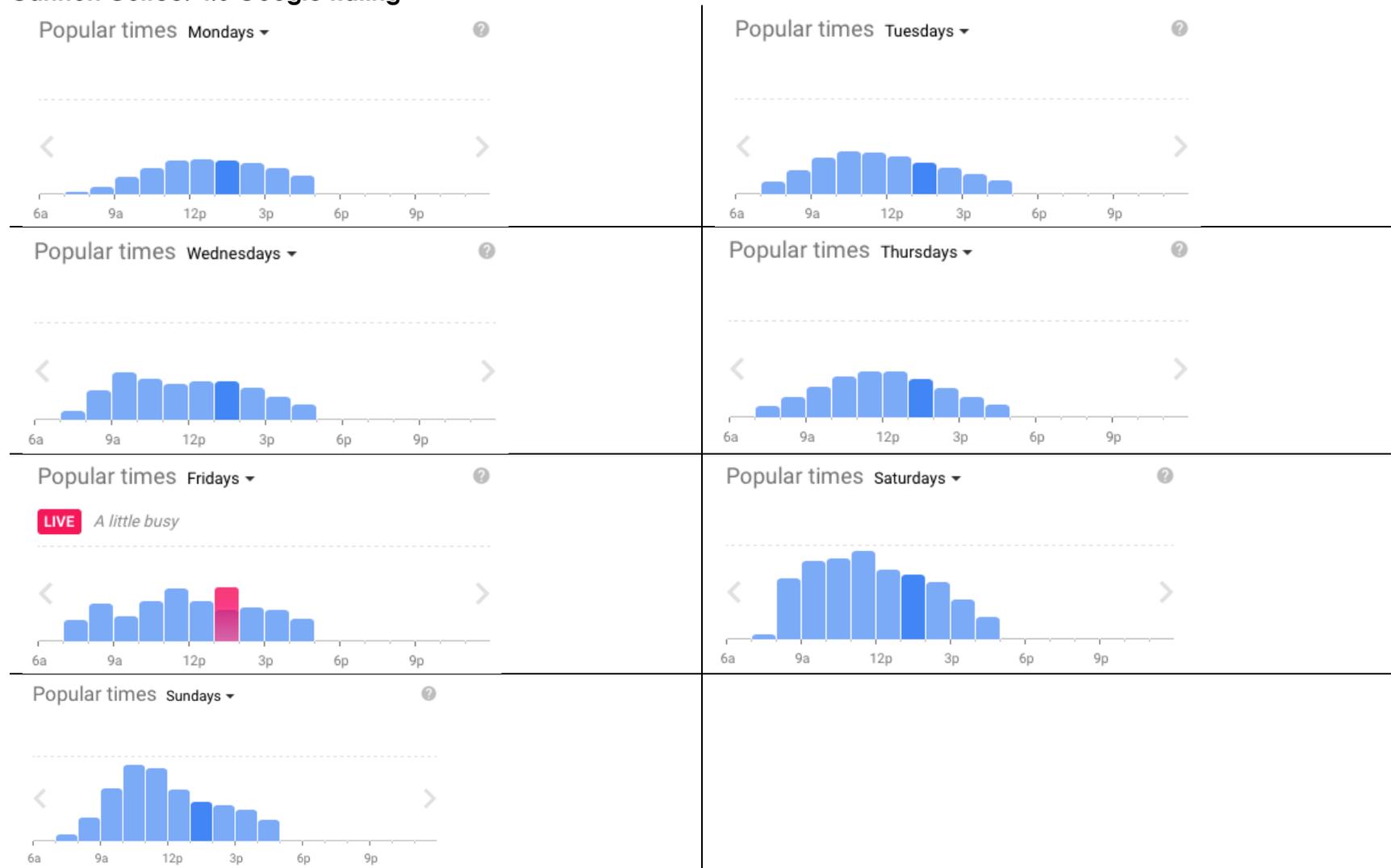
- The retail employment growth is a good sign of the health, vitality, and viability of retail businesses in Ottawa Street BIA. Increasing employment may be associated with increasing sales (caution as employment does not differentiate between part-time and full-time employment).
- Nearby, there is a significant population base of over 17,000 workers that includes retail employment, manufacturing, and transport/trades.
- The City of Hamilton noted an increase in the demand for off-street parking permits in Ottawa St. N. suggesting an increase in the number of workers in the area.

### 3.4 Customer Visitation Data

#### Customer Flow Times

The following graphs illustrate customer visitation at select Ottawa Street BIA businesses.

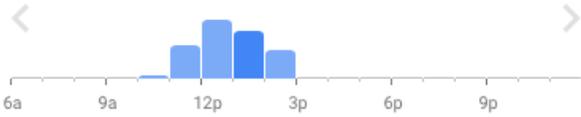
#### Cannon Coffee: 4.6 Google Rating





### Limoncello: 3.8 Google Rating

Popular times Mondays ▾



Popular times Tuesdays ▾



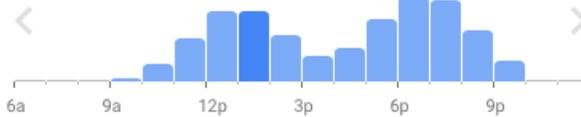
Popular times Wednesdays ▾



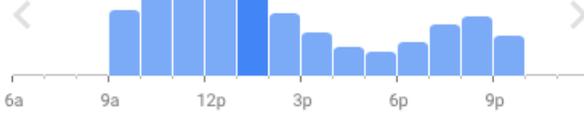
Popular times Thursdays ▾



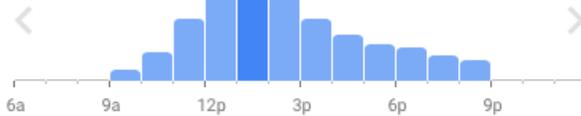
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾



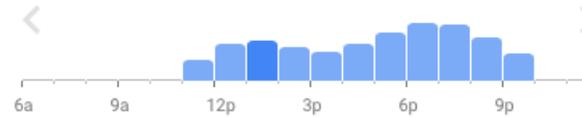


## Hambgr: 4.6 Google Rating

Popular times Mondays ▾



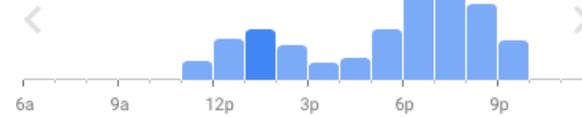
Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



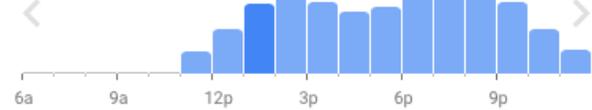
Popular times Fridays ▾



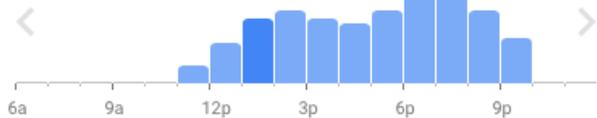
**LIVE** Not too busy



Popular times Saturdays ▾



Popular times Sundays ▾





### Southern Smoke Barbecue: 4.4 Google Rating

Popular times Tuesdays ?



Popular times Wednesdays ?



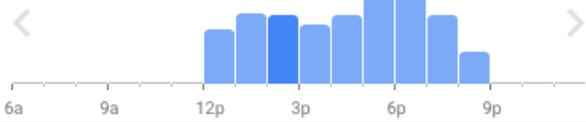
Popular times Thursdays ?



Popular times Thursdays ?



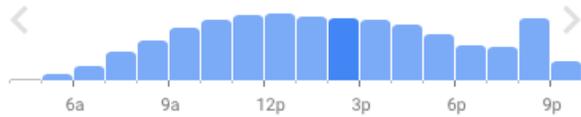
Popular times Saturdays ?



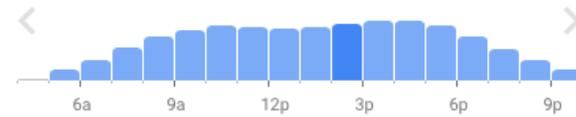


### Tim Horton's: 4.3 Google Rating

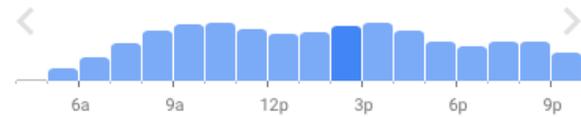
Popular times Mondays ▾



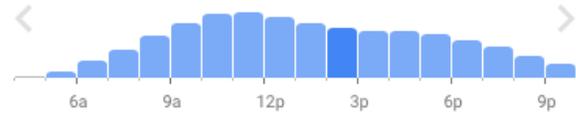
Popular times Tuesdays ▾



Popular times Wednesdays ▾



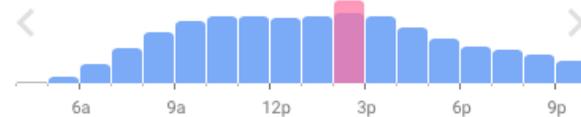
Popular times Thursdays ▾



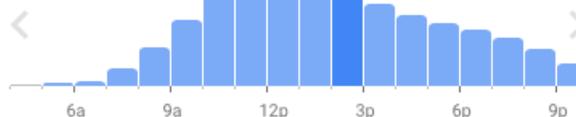
Popular times Fridays ▾



**LIVE** *A little busy*

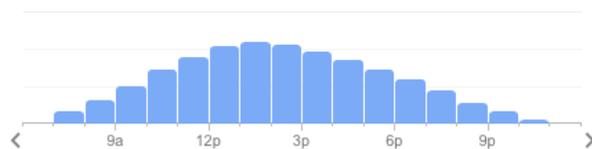


Popular times Saturdays ▾



Popular times ?

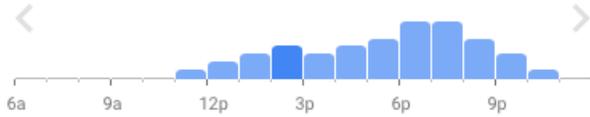
Sundays ⇅



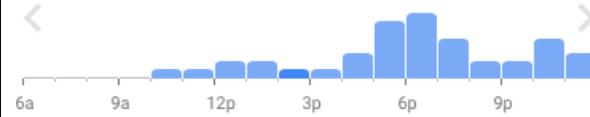


### Mike's Subs: 4.5 Google Rating

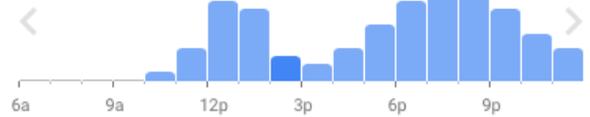
Popular times Mondays ▾



Popular times Tuesdays ▾



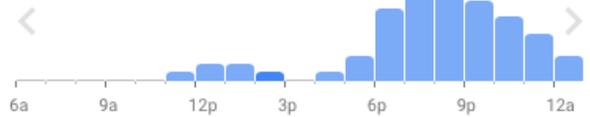
Popular times Wednesdays ▾



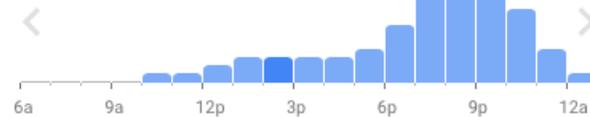
Popular times Thursdays ▾



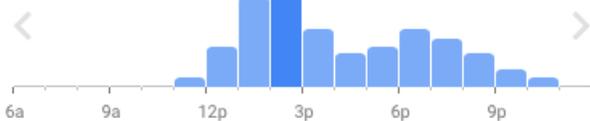
Popular times Fridays ▾



Popular times Saturdays ▾



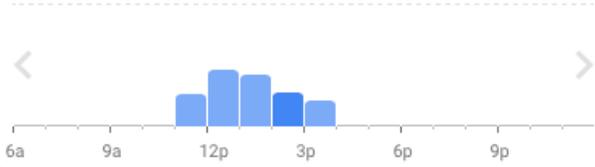
Popular times Sundays ▾



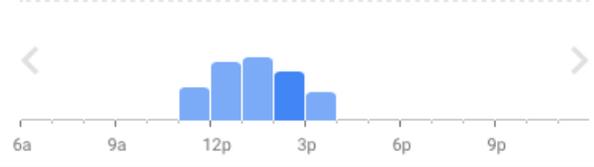


### Gorilla Cheese: 4.7 Google Rating

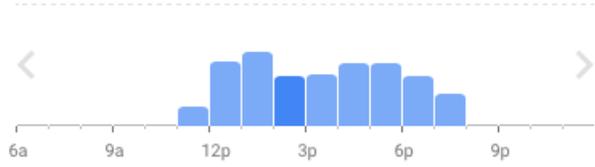
Popular times Tuesdays ?



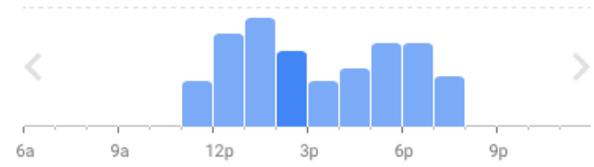
Popular times Wednesdays ?



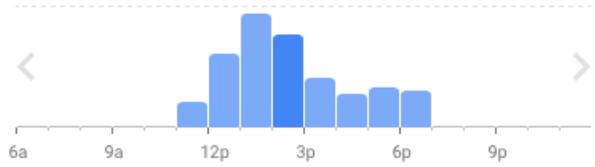
Popular times Thursdays ?



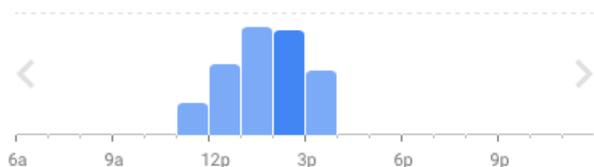
Popular times Fridays ?



Popular times Saturdays ?



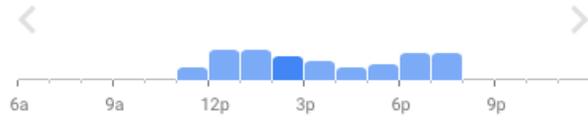
Popular times Sundays ?





### Curbside Grill: 4.5 Google Rating

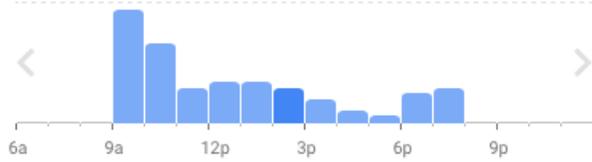
Popular times **Wednesdays** ▼ ⓘ



Popular times **Fridays** ▼ ⓘ



Popular times **Saturdays** ▼ ⓘ

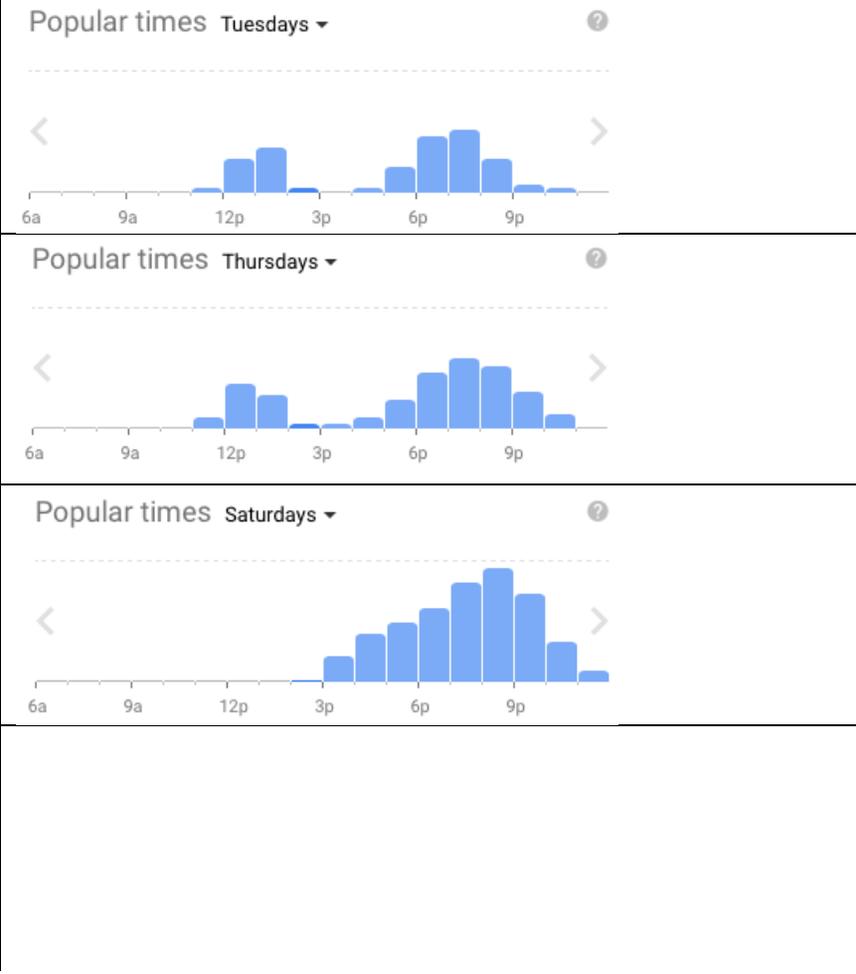
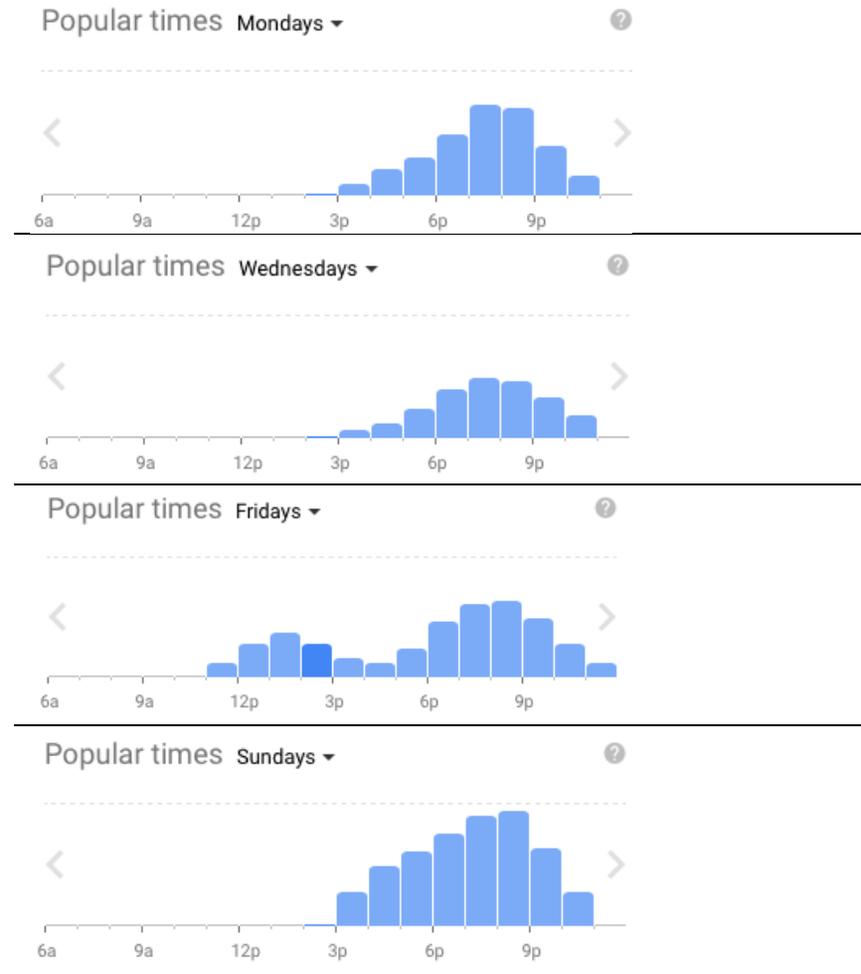


Popular times **Sundays** ▼ ⓘ





### Southsea Restaurant: 4.2 Google Rating





## Findings

- All eating establishments are heavily reliant on weekend traffic. Traffic peaks during these periods.
- Many eating establishments have developed a business model whereby they are busy throughout the weekday and weekend including Cannon Coffee and Tim Horton's.
- Others have developed a good business model where the businesses are able to sustain itself based on catering to at least two peak periods throughout the day. This tends to be lunch and dinner. These eating establishments include Mike's Subs, Limoncello, Hmbrgr, and South Sea Restaurant. Curbside Grill does well catering to weekend breakfast and lunch as well as some dinner traffic.
- Most eating establishments that serve dinner start to fall off after 9 pm. Some are able to continue to draw customers into the evening including Mike's Subs, Tim Horton's and some restaurants.
- Location is important as well. Those in the central area of Ottawa St. N. that are clustered close together tend to draw more and sustained traffic throughout the day and evening including weekdays and weekends. Those south of Cannon Street have lower traffic volumes.



## 4.0 Quality of Life Statistics –Housing Prices

### 4.1 Housing Prices

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

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

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

*Source: Realtors' Association of Hamilton and Burlington*



## 5.0 Commercial Audit and Rent Review

An audit of the commercial businesses in Ottawa Street BIA was conducted in November 2017. Ground floor and easily accessible businesses were included in the audit. Each business was noted for its name, address, business type according to NAICS, and estimated size (in square feet). Major social services such as the YWCA, houses of worship, schools, and residential were excluded.

### Ottawa Street BIA Commercial Business Audit – 2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>				
Clothing and Accessories	12	9.3%	13,800	5.8%
Furniture and Home Furnishings	5	3.9%	8,500	3.5%
Antiques, Second Hand	8	6.2%	22,500	9.4%
Fabric and Fabric Related	12	9.3%	29,000	12.1%
Art Galleries	4	3.1%	8,577	3.6%
Electronics and Appliance Stores	2	1.6%	3500	1.5%
Building Supply and Garden Equipment	3	2.3%	6500	2.7%
General Merchandise	3	2.3%	4500	1.9%
Sporting Goods, Hobby, Book, Music	7	5.4%	14,532	6.1%
Other Retail	6	4.7%	8,200	3.4%
<b>Total Retail</b>	<b>62</b>	<b>48.1%</b>	<b>119,609</b>	<b>49.9%</b>
<b>Food/Drug Retail</b>				
Food and Beverage Stores	5	3.9%	7,300	3.0%
Health and Personal Care Stores	4	3.1%	4,100	1.7%
<b>Total Food/Drug Retail</b>	<b>9</b>	<b>7.0%</b>	<b>11,400</b>	<b>4.8%</b>
<b>Food Services</b>	<b>21</b>	<b>16.3%</b>	<b>44,657</b>	<b>18.6%</b>
<b>Services</b>				
Personal Services	2	1.6%	2,100	0.9%
Personal Services - Beauty	9	7.0%	17,115	7.1%
Financial Services	0	0.0%	0	0.0%



Medical Services	4	3.1%	6,300	2.6%
Professional Services	4	3.1%	5,500	2.3%
Recreation Services	3	2.3%	5,900	2.5%
Other Services	4	3.1%	9,700	4.0%
<b>Total Services</b>	<b>26</b>	<b>20.2%</b>	<b>46,615</b>	<b>19.5%</b>
<b>Total Occupied</b>	<b>118</b>	<b>91.5%</b>	<b>222,281</b>	<b>92.8%</b>
<b>Vacant</b>	<b>11</b>	<b>8.5%</b>	<b>17,300</b>	<b>7.2%</b>
<b>Total</b>	<b>129</b>	<b>100.0%</b>	<b>239,581</b>	<b>100.0%</b>

Source: 360 Collective



## Ottawa Street BIA Commercial Business Audit

	2017				2009			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>								
Clothing and Accessories	12	9.3%	13,800	5.8%	9	7.1%	12,600	6.1%
Furniture and Home Furnishings	5	3.9%	8,500	3.5%	5	3.9%	6,700	3.2%
Antiques, Second Hand	8	6.2%	22,500	9.4%	15	11.8%	19,400	9.4%
Fabric and Fabric Related	12	9.3%	29,000	12.1%	17	13.4%	41,700	20.2%
Art Galleries	4	3.1%	8,577	3.6%	1	0.8%	4,000	1.9%
Electronics and Appliance Stores	2	1.6%	3,500	1.5%	6	4.7%	8,100	3.9%
Building Supply and Garden Equipment	3	2.3%	6,500	2.7%	5	3.9%	14,300	6.9%
General Merchandise	3	2.3%	4,500	1.9%	1	0.8%	500	0.2%
Sporting Goods, Hobby, Book, Music	7	5.4%	14,532	6.1%	6	4.7%	9,700	4.7%
Other Retail	6	4.7%	8,200	3.4%	10	7.9%	15,250	7.4%
<b>Total Retail</b>	<b>62</b>	<b>48.1%</b>	<b>119,609</b>	<b>49.9%</b>	<b>75</b>	<b>59.1%</b>	<b>132,250</b>	<b>63.9%</b>
<b>Food/Drug Retail</b>								
Food and Beverage Stores	5	3.9%	7,300	3.0%	6	4.7%	8,800	4.3%
Health and Personal Care Stores	4	3.1%	4,100	1.7%	3	2.4%	5,000	2.4%
<b>Total Food/Drug Retail</b>	<b>9</b>	<b>7.0%</b>	<b>11,400</b>	<b>4.8%</b>	<b>9</b>	<b>7.1%</b>	<b>13,800</b>	<b>6.7%</b>
<b>Food Services</b>	<b>21</b>	<b>16.3%</b>	<b>44,657</b>	<b>18.6%</b>	<b>13</b>	<b>10.2%</b>	<b>24,600</b>	<b>11.9%</b>
<b>Services</b>								
Personal Services	2	1.6%	2,100	0.9%	3	2.4%	4,400	2.1%
Personal Services - Beauty	9	7.0%	17,115	7.1%	8	6.3%	8,200	4.0%
Financial Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Medical Services	4	3.1%	6,300	2.6%	1	0.8%	500	0.2%
Professional Services	4	3.1%	5,500	2.3%	5	3.9%	8,600	4.2%
Recreation Services	3	2.3%	5,900	2.5%	1	0.8%	3,000	1.5%
Other Services	4	3.1%	9,700	4.0%	1	0.8%	200	0.1%
<b>Total Services</b>	<b>26</b>	<b>20.2%</b>	<b>46,615</b>	<b>19.5%</b>	<b>19</b>	<b>15.0%</b>	<b>24,900</b>	<b>12.0%</b>



<b>Total Occupied</b>	<b>118</b>	<b>91.5%</b>	<b>222,281</b>	<b>92.8%</b>	<b>116</b>	<b>91.3%</b>	<b>195,550</b>	<b>94.5%</b>
<b>Vacant</b>	<b>11</b>	<b>8.5%</b>	<b>17,300</b>	<b>7.2%</b>	<b>11</b>	<b>8.7%</b>	<b>11,300</b>	<b>5.5%</b>
<b>Total</b>	<b>129</b>	<b>100.0%</b>	<b>239,581</b>	<b>100.0%</b>	<b>127</b>	<b>100.0%</b>	<b>206,850</b>	<b>100.0%</b>

Source: 360 Collective

### Findings

There is approximately 240,000 sq. ft. of commercial businesses in Ottawa Street BIA which is a medium sized commercial main street.

- There are 129 different businesses. The average size of each business is 1,857 sq. ft. There is a mixture of a few very large retail units as well as small units.
- Retail merchandise is the largest category. Approximately 50% of the total square footage is devoted to a mix of retail. However, the majority of retail is in fabric, fabric related goods/services, and antiques. In addition, there are a number of complementary businesses including furniture and home furnishings and art galleries. There is a growing number of apparel and accessories related businesses as well as leisure retail.
- Food services has been growing. Cafes, casual eating establishments, fast food, and dinner places account for 19% of the total square footage. This has been a significant shift.
- Local neighbourhood serving food, beverage, convenience, drug store, and health related goods is relatively small in proportion.
- Services have grown and account for 20% of the total square footage. This is primarily from personal services related to barber shops, beauty salons, aesthetics, etc.
- Vacancy stands at 11 units or 7% of the total square footage.

### Changes since 2009/2010

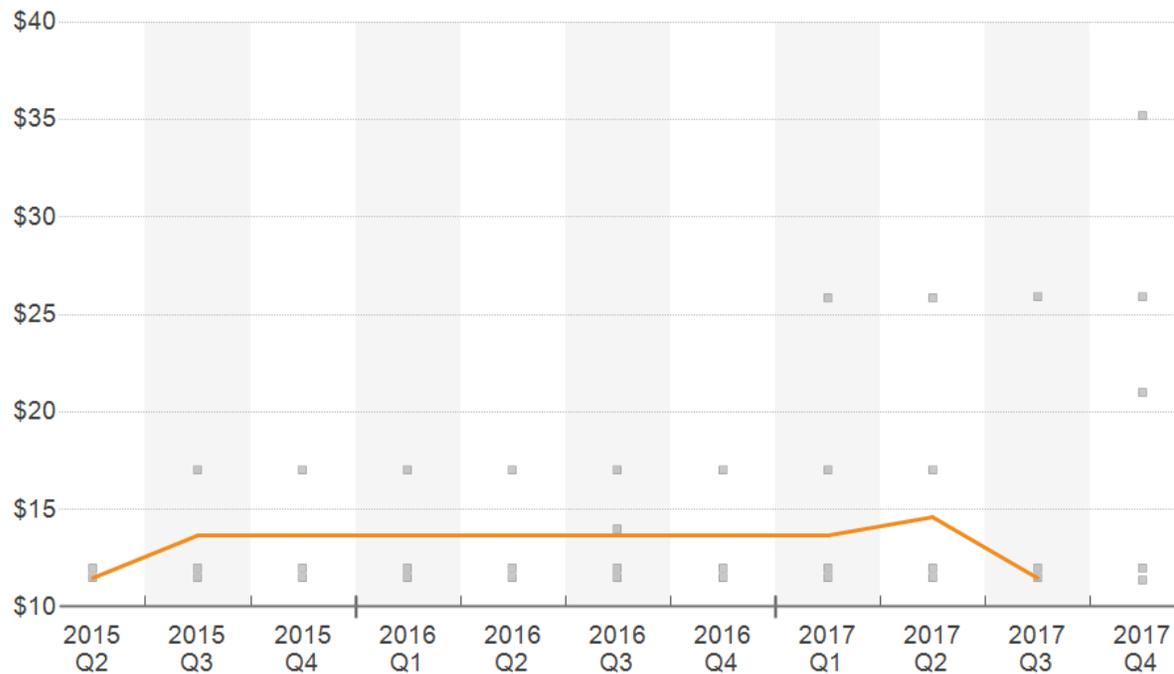
- Since 2009, more retail space has been added including the use of upper and lower levels for accessible retail space as well as some residential units.
- There is approximately 32,000 more sq. ft. of retail commercial space in Ottawa Street.
- Retail merchandise has declined 14 points from 2009 to 2017. This includes less fabric and related goods and services, antiques, building supply and garden equipment, electronics and appliances, and other retail.
- Food services has grown significantly almost doubling from 2009 to 2017.
- Services has increased including personal service related to barber shops, beauty salons, aesthetics, etc.
- Vacancy is higher than in 2009 but not a significant concern.

## 5.1 Rental and Land Value Statistics

### Net Rent Analysis

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

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



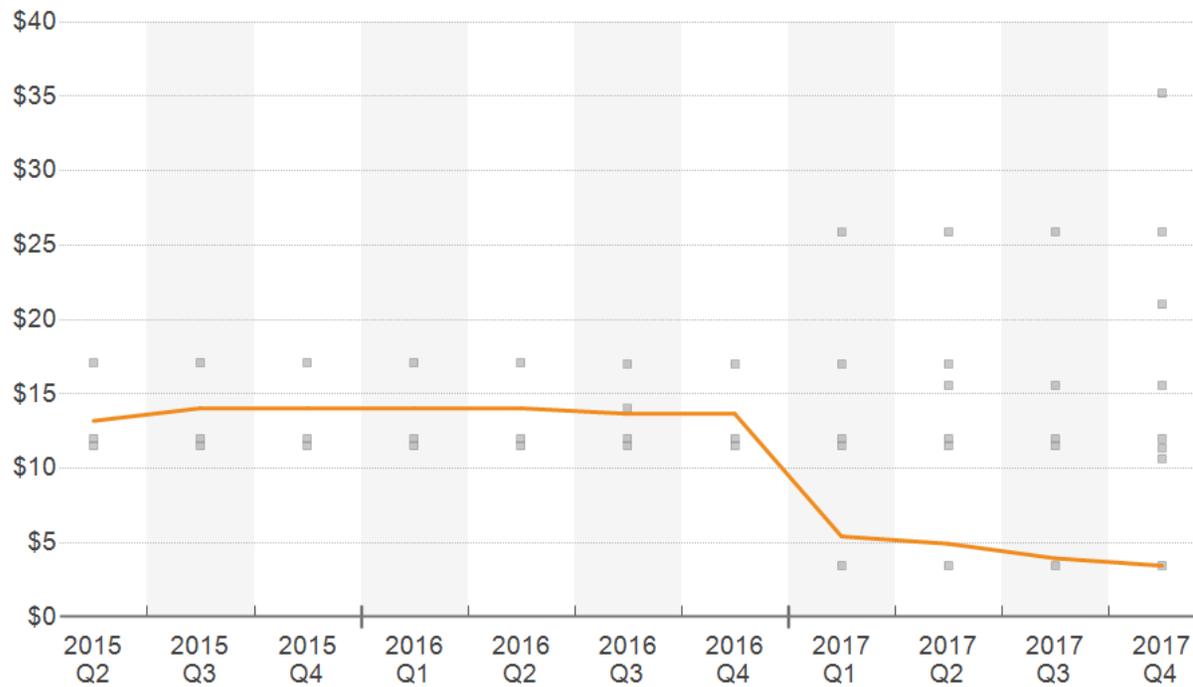
Source: CoStar

#### Findings Net Rent Small Units

- Generally, net rents for spaces under 10,000 sq. ft. are \$15/sq. ft.
- Since 2017 there are three sample properties whereby rents have increased higher (note that the \$35/sq. ft. unit is a gross lease).



### Net Rents (Small and Large Units)



Source: CoStar

### Net Rents all Retail Unit Sizes

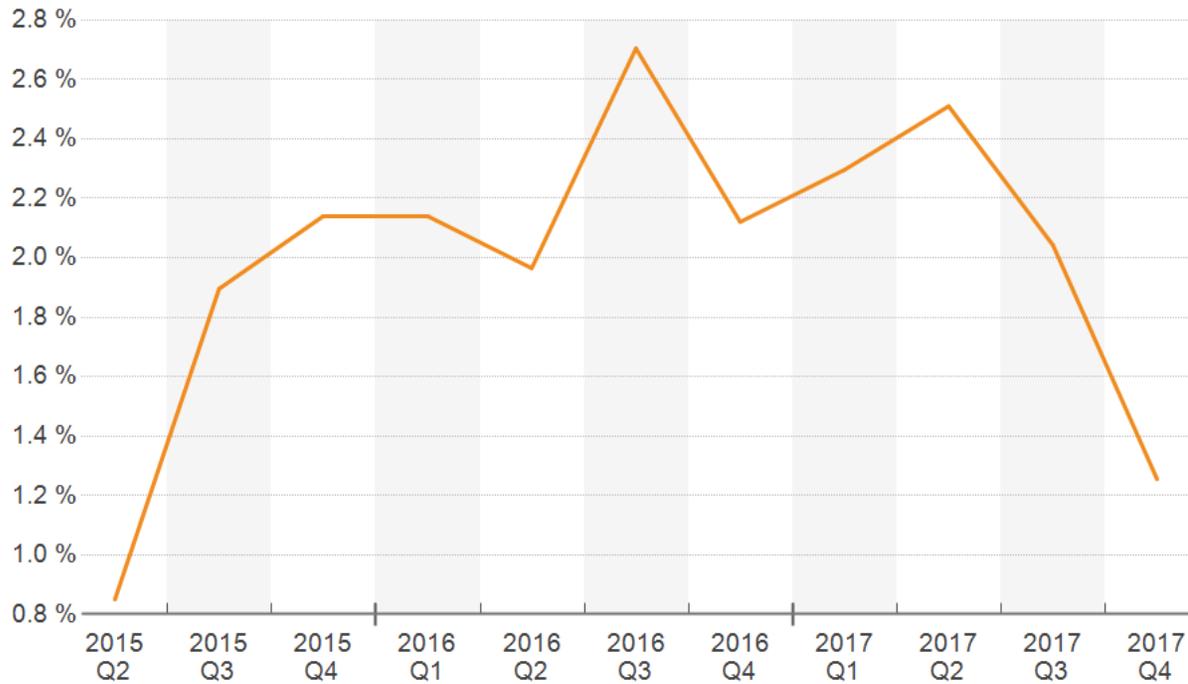
- Adding in the sample of all units both small and large, shows that by 2017 there is a wider disparity between the retail rates. Large units still rent for lower rates compared to the smaller units.
- While the trend line points downward in 2017, the average rents still remain within the \$15/sq. ft. range.



## Vacancy

Using the similar methodology assessing vacancy in the past three years for large and small units illustrates a falling vacancy rate.

## Vacancy Rate



Source: CoStar

## Findings Vacancy

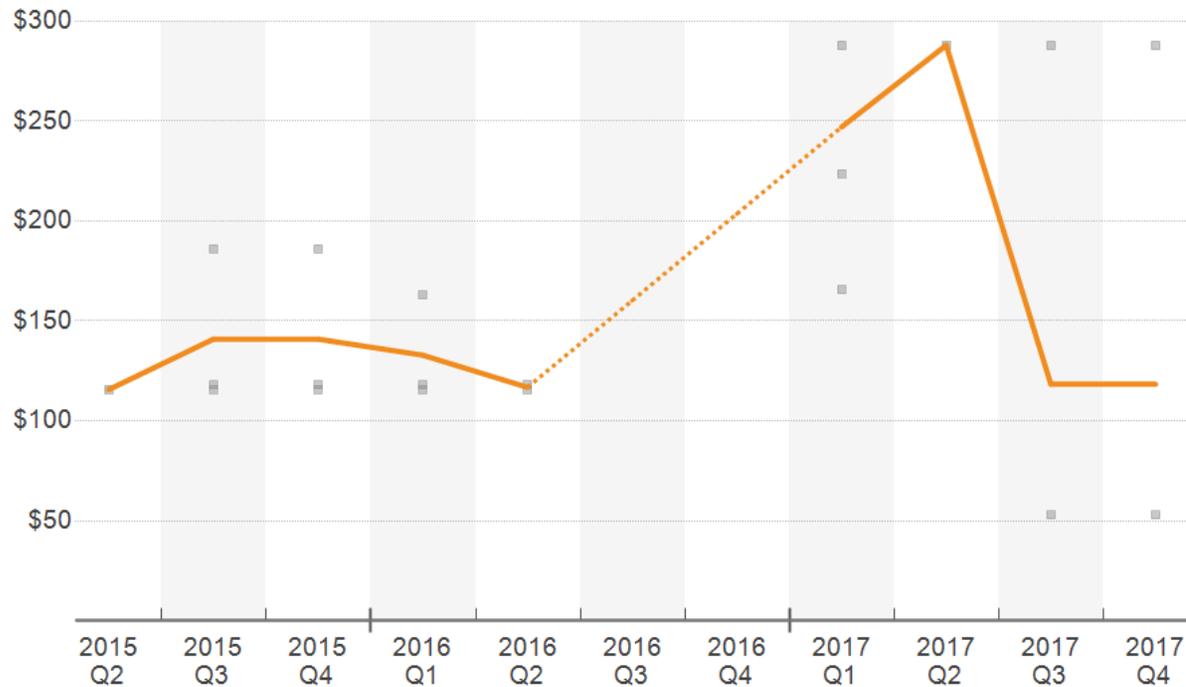
- Vacancy rates have been low on Ottawa St. N. BIA.
- The vacancy rate movement has been very tight from 2015 to 2017.
- The vacancy reflects a normal turnover in businesses.



### Average Asking Price/Sq. Ft.

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

### Average Asking Price/Sq. Ft.



### Average Asking Price of Commercial Buildings

- Average prices of retail and mixed use commercial properties have increased from 2015 to 2017. While there are only a limited number of sample properties the trend suggests a doubling of sale prices from \$140/sq. ft. to \$280/sq. ft.
- This reflects the trend for units under 10,000 sq. ft. of retail space.
- The larger units over 10,000 sq. ft. tend to sell for much less than the average (\$50/sq. ft.)

Source: CoStar



## 5.2 Ottawa St. BIA Website Review

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

The five areas assessed were:

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

Note that specific aspects of the Ottawa St. BIA brand character were not assessed in this section of the report.

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

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

### **Nature of Findings**

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



### Detailed Findings

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

### Rating of Key Areas of the Ottawa St. BIA Website

Area Reviewed	Ottawa Street ★★★★
Functionality	Excellent
Content & Purpose	Good
Innovation and Interactivity	Very Good
Visual Design	Good
Mobile Optimized	Excellent
Accessibility Compliance	42/199



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

**Content Provided in Ottawa St. BIA Website (√ demarks the Website provides this feature)**

<b>Content Provided</b>	<b>Ottawa Street</b>
News/Blog & Events	√
History	
Gallery	
Directory	√
Business /Investor	
Member Information	
Buy/Sell/Rent Properties	√
Testimonials	
Mission Statement / About Us	√
Contact Us/ Media	√
Member benefits	
Member portal/login	√



## AODA Compliance

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

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

## Ottawa St. BIA Summary

Ottawa Street is similar to many BIA websites in that it has a clean, simple, and mobile-friendly. There is basic to good use of creative to focus the content of the website around “Food, Fashion and Finds.” The target market appears to be residents and visitors with information on events and retail sales targeting this group. There is little if any events for businesses on the site. The Ottawa St. BIA website does provide a quasi-portal in its footer for members to allow them to update listings or their business information and access board minutes and partner information. There is room for further information and services, which target businesses, investors and partners. As noted, the site needs to be aligned with the brand strategy.



Hamilton's destination for inspiration.

OTTAWA STREET [Home](#) [About](#) [Business Directory](#) [Media](#) [Contact](#) [Blog](#) [Hot Properties](#) [News & Events](#) [Add an Event](#)

# CANADA 150

ALL

FOOD

FASHION

FINDS

**What's New on Ottawa Street**  
Sorry no events at this time.

**About Us**  
Ottawa Street is Hamilton's destination for inspiration and reflects the eclectic spirit of our City. With over 130 shops, featuring great food, fantastic fashion and fabulous finds, Ottawa Street will inspire even the most novice Do-it-Yourself enthusiasts.  
There are endless creative combinations of antiques, fabric, furniture, food, art and collectibles as well as many home services and great restaurants. Be one of the décor enthusiasts that visit regularly to discover our charms.

## Ottawa St. BIA home page

### List Your Building

- Listing Type
- Building for lease
  - Building for sale
  - Business for sale

- Parking?  Yes  No

- Basement?  Yes  No



#### Email Blasts

If you would like to receive our quick email blasts for information on special events, promotions, store sales and specials, please fill out the form below. Note that your information will be kept confidential and will be used for no outside purposes and by no one else but the Ottawa Street BIA.

Subscribe

**Merchant Services**

[List Your Building](#) | 
 [Request a Website Change](#) | 
 [BIA Info, City Links and Partners](#) | 
 [Board Meeting Minutes](#)

Copyright © 2017 Ottawa Street BIA.

## Member Options

### Business services – list your building



## 6.0 Investment in Ottawa Street BIA

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

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

### Past and Current Development Applications

Address	Committee of Adjustment or Zoning Code	Reference Number		Additional Details
185 Ottawa St. N.	A	78	224	
6 Ottawa St. N.	A	78	101	
82.5 Ottawa St. N.	A	81	98	
4.5 Ottawa St. N.	A	83	147	
259 Ottawa St. N.	A	83	29	
28 Ottawa St. N.	A	86	79	
146 Ottawa St. N.	A	89	337	
66 Ottawa St. N.	A	94	71	
208 Ottawa St. N.	A	96	75	
184 Ottawa St. N.	A	97	57	
218 Ottawa St. N.	B	1	33	
262 Ottawa St. N.	A	1	125	
262 Ottawa St. N.	B	1	33	
196 Ottawa St. N.	HM/B	2	109	
226 Ottawa St. N.	HM/A	4	267	
137 Ottawa St. N.	HM/A	6	5	
131 Ottawa St. N.	HM/A	8	114	
286-288 Ottawa St. N.	HM/A	8	323	
155 Ottawa St. N.	HM/A	10	237	
139 Ottawa St. N.	MDA	10	94	Demolish building for 12 parking spaces



193 Ottawa St. N.	HM/A	11	226	
299 Ottawa St. N.	HM/A	11	261	
174 Ottawa St. N.	HM/B	12	71	
256 Ottawa St. N.	DA	12	225	Construct 1 storey 218 m2
180 Ottawa St. N.	HM/B	13	41	
224 Ottawa St. N.	HM/A	14	308	
191 Ottawa St. N.		14	339	
187 Ottawa St. N.	HM/A	14	252	
187 Ottawa St. N.	HM/A	14	331	
82.5 Ottawa St. N.	DA	14	78	Demolish for new restaurant
210-212 Ottawa St. N.	MDA	15	72	Add 1 Storey addition to rear
201 Ottawa St. N.	HM/A	15	24	
210-212 Ottawa St. N.	HM/A	15	9	
52-64 Ottawa St. N.	ZAR	15	62	Demolish for multi-service facility

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Source: City of Hamilton Planning and Economic Development Department

#### Legend

SPA: Site Plan Approval

DA, MDA: Development Application (modified)

HM/A, HM/B: Committee of Adjustment

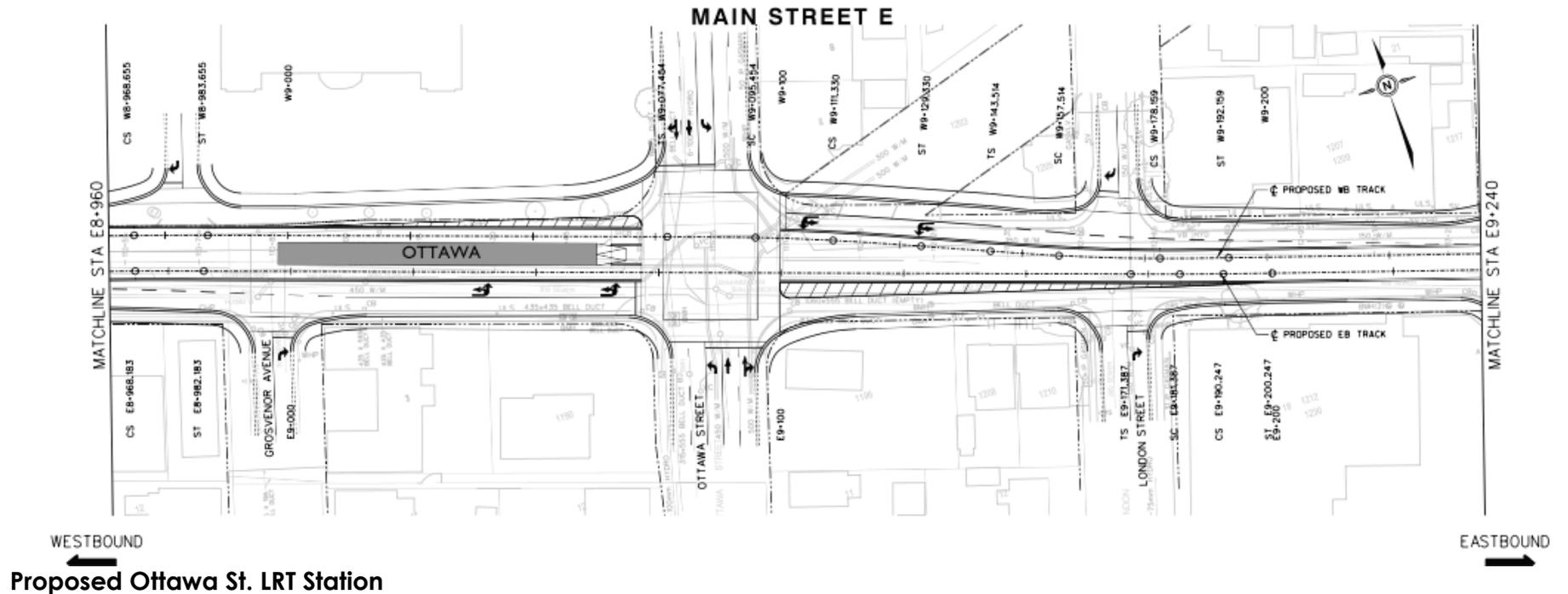
ZAR: Zoning ByLaw Amendment Application

ZAC: Zoning Application



### Proposed Ottawa St. LRT Station

The following pertains to proposed LRT station at Ottawa St. N. This information is current as of March 2018. The proposed LRT along Main St. E. and Ottawa St. will impact pedestrian movement and development. Pedestrians flowing to the LRT station may impact potential retail sales development. In addition, development near the station will occur from residents wanting to live closer to high order transit options. Note that westbound traffic at Ottawa St. must divert.





## Commercial Building Permits

### Ottawa Street BIA Value of Commercial Building Permits

Year	Commercial	Industrial	Total
2012	\$465,600	\$0	\$465,600
2013	\$246,000	\$0	\$246,000
2014	\$1,869,200	\$25,000	\$1,894,200
2015	\$217,840	\$0	\$217,840
2016	\$345,000	\$0	\$345,000
<b>Total</b>	<b>\$3,143,640</b>	<b>\$25,000</b>	<b>\$3,168,640</b>

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

#### Notes:

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

#### Findings

- Over \$3 million has been invested in commercial properties in Ottawa Street BIA in the period from 2012 to 2016.
- Investment includes smaller redevelopments as well as larger scaled building renovations such as the Tim Horton's store/museum.
- Optimism for Ottawa's Street BIA's continued growth including existing redevelopment work at 225 Ottawa St. N. is evident along the street.



### Grants and Incentives

#### Ottawa Street BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG
2012	\$127,661.50
2013	\$163,886.30
2014	\$25,108.60
2015	\$0
2016	\$17,662.35
<b>Total</b>	<b>\$334,318.75</b>

Source: City of Hamilton

#### Findings

- Ottawa St. BIA businesses have made very good use of the City of Hamilton incentive programs.
- However, from 2014 to 2016, the total value of the incentive-related investment has declined.

### Assessed Value

#### Ottawa Street BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2012	\$20,251,900	
2013	\$19,668,200	-2.9%
2014	\$19,956,142	1.5%
2015	\$20,530,838	2.9%
2016	\$22,420,242	9.2%
2017	\$24,640,805	9.9%

Source: MPAC, City of Hamilton

#### Findings

- From 2012 to 2017, the assessed value of the commercial areas within the Ottawa Street BIA has increased by over \$4.4 million. This represents an annualized rate of 3.3%.



- There was a decrease in value from 2012 to 2013. From 2016 onwards the growth rate has rebounded to 9% to 10% annually.

#### **Implications for Ottawa Street BIA**

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



## Ottawa Street BIA Budget

The Ottawa Street levy put towards the budget remained constant from 2013 to 2017. The parking revenue sharing has fallen from 2013 to 2016. In 2017, there was a modest uptick. Overall, the Ottawa St. BIA budget has been declining.

## Ottawa Street BIA Budget

	<b>Christmas Grant</b>	<b>City Contribution</b>	<b>Parking Revenue Sharing</b>	<b>Total Grants</b>	<b>Levy</b>	<b>BIA Budget</b>
2012	\$960.58	\$13,873.27	\$22,983.47	\$37,817.32	\$132,250	\$170,067.32
2013	\$961.35	\$14,471.66	\$23,057.74	\$38,490.75	\$133,000	\$171,490.75
2014	\$1000.00	\$14,459.23	\$24,286.57	\$39,745.80	\$133,000	\$172,745.80
2015	\$1,316.60	\$15,757.93	\$19,163.79	\$36,238.32	\$133,000	\$169,238.20
2016	\$1,325.81	\$14,264.83	\$15,558.63	\$31,149.27	\$133,000	\$164,149.27
2017	\$1,300.00	\$13,759.84	\$16,639.48	\$31,699.32	\$133,000	\$164,699.32

Source: City of Hamilton



## 7.0 Key Person Interviews

Key person interviews with businesses were conducted during November 2017. The opinions expressed in this section do not necessarily reflect the opinions of 360 Collective, the City of Hamilton, or the Ottawa Street BIA. The following represents comments and opinions related to strengths, weaknesses, opportunities, and threats. A total of 13 interviews were conducted with Ottawa St. BIA businesses as well as additional interviews with City staff.

### STRENGTHS

#### ECONOMIC DEVELOPMENT

##### Customer Draw

- Similar catchment area – draw extensively and regionally
- Many businesses stated that a high proportion of customers come from outside of the local neighbourhood area
- Destination business
- Tend to be middle-aged and older customer including families and empty nesters
- Appealing more to young adults but active seniors still make up a large portion of the customers
- Summer there is more tourism

##### Ottawa Street Momentum

- Believe that Ottawa St. still on the momentum swing
- Ottawa St. is awesome – keep it coming

##### Affordable

- Rent is affordable, reasonable on the street

##### Sales Growth

- Sales have increased every year
- Have steady sales throughout the year and not a lot of peaks and valleys
- Sales growth are meeting business plan expectations and continue to grow
- Increasing sales
- Have been able to curate the business mix to suit the demographics of the street
- Increased sales and grown the store



### **Cross Shopping**

- Visitors will cross shop other stores but they tend to stay within a tight circle. They don't shop the entire street

### **Business Mix**

- Like the fact that there are competitive and complementary stores on Ottawa St. It creates critical mass and draw potential and expands the pie for everyone
- Low vacancy rate
- Able to appeal beyond female customer base to males with a greater diversity of business mix

### **Educated Consumer**

- More and more, the Ottawa St. visitor is highly educated and avail themselves of a lot of information prior to visiting the street – details are very important to them
- Online advertising for businesses works best – potential customers that businesses appeal to are online

## **PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING**

### **Clean and Safe**

- Good to see the street being improved and cleaned up

### **Availability of Parking**

- Amount of parking is good

### **Price of Parking**

- Would like to see similar to Downtown Oakville – instead of free parking on Ottawa St. for a month, offer it free on Saturdays throughout the year

## **ORGANIZATION/GOVERNANCE**

### **BIA**

- Creating a better community
- BIA is a good organization

### **CITY**

- Doing a good job



## **MARKETING**

### **Events**

- Happy with the nature and size of the two major events
- Events are good
- Sew Hungry is a good festival
- New events are working better



## **WEAKNESSES**

### **ECONOMIC DEVELOPMENT**

#### **Number of Visitors to the Stores**

- Traffic is down

#### **Local Neighbourhood Socio-Economic Profile**

- The businesses considering Ottawa St. are not 100% aligned with the demographics of the local population. This can create a risky proposition
- Local and regional visitor are price sensitive

#### **Gift Giving**

- Not a big gift giving customer base here, buying for themselves primarily

#### **Destination Oriented**

- Being primarily destination oriented businesses, if visitors do not come on one weekend due to inclement weather then total sales could be off significantly for the year
- Need visitors from outside the area to survive – dangerous to rely on these customers too much

#### **Business Mix**

- Fabric and home furnishings mix to the street is declining; restaurants are increasing
- Some food services are closing, not doing enough sales
- A lot of antiques and second-hand concentration
- Less reason to visit Ottawa Street as the business mix has become too diffused and there is no critical mass of anything

#### **Price Sensitivity**

- Customers are still very price sensitive



## PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

### OPPORTUNITIES

#### ECONOMIC DEVELOPMENT

##### Missing Businesses

- More restaurants including fine dining
- Need places to sit, enjoy, relax
- Customers want more cafes
- Want more complementary goods especially related to home improvement
- More night time economy
- Fresh greengrocer
- The circular economy is growing and Ottawa St. BIA can be at the forefront of that change
- Want to have depth and breadth of stores that will make Ottawa St. BIA more self-contained – complete street for local and regional shopping
- Need to offer a fuller range of goods and services
- Need more breakfast places
- Could add a national chain such as Goodness Me, Giant Tiger, etc.

##### Variety

- Want more variety of businesses

##### Weekday Daytime Traffic

- Need more people on the street midweek during the day

## PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

##### Streetscape

- Want to see the street beautiful
- Improving the streetscape will draw more people, make them look at the street in a different way
- Streetscape should encourage people to relax on Ottawa Street, create an atmosphere that makes people happy, sit, visit, relax that is intimate
- The streetscape will encourage all businesses to up their game
- Good public realm will attract people and then more people attract more people



- Want to see more money put into beautification
- Need better wayfinding and placemaking to encourage visitors to venture south of Cannon St.
- Need better wayfinding for off-street parking areas

### **Parking**

- Increased technology for parking and paying with mobile apps will be a good thing

### **Atmosphere**

- Needs a more family atmosphere

## **ORGANIZATION/GOVERNANCE**

### **Business Plan**

- Have to be able to curate the business plan to suit the different demographic groups on the street or in the area including blue-collar workers, gentrifying neighbourhood locals who may have less disposable income, regional value-conscious shoppers, regional visitors looking for an experience, etc.
- More is better, it expands the pie, there will be enough for everybody
- However, customers are still price sensitive

### **BIA**

- Better communication with members, return emails promptly, develop a system for immediate response
- BIA is working better together
- BIA using tagline – "come experience Barton to Main" to encourage shoppers to go further south of Cannon St.

## **MARKETING**

### **Education**

- More opportunity to teach young people and young adults about home improvement options, how to do it, etc.
- Education is a great way to increase sales, be part of the community, engage and interact



## **THREATS**

### **ECONOMIC DEVELOPMENT**

#### **Other Main Streets**

- Consider Downtown, Concession St. as key competitive areas when businesses are deciding whether to locate on Ottawa St.
- Other areas are too expensive in comparison such as Locke St., James St. N., Westdale, and Dundas

#### **Pricing**

- Hard to find the right price point within the region for customer draw. For Oakville residents, Ottawa St prices may be good value but for Port Dover residents, prices may be expensive
- Need to be able to offer selection and good prices combined

### **PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING**

#### **Streetscape**

- Major construction will hurt businesses – have to find a way of doing updates without harming businesses



## 8.0 Strengths, Weaknesses, Opportunities, and Threats

A workshop with Ottawa St. BIA members was held in January 2018. At the workshop, the interactive session or the event followed the principles of SOAR:

- Strengths
- Opportunities
- Aspirations
- Results

SOAR is used to focus on the positive aspects of the revitalization process. However, a traditional SWOT – Strengths, Weaknesses, Opportunities, and Threats analysis was completed.

### 8.1 Workshop #1 Findings

Based on a combined discussion, the following were key outputs from the workshop.

#### **Vision**

- Want a more diverse street – a bit of everything
- But there has to be focus and concentration to the mix
- Want diverse and vibrant
- Extend dwell time
- Multifunctional street
- Focus on retail and food
- Emotional and experience based street

#### **Role of BIA**

- Help business to open and understand the dynamics of the street, where customers come from, how to make a viable business plan, and to avoid the pitfalls

#### **Business Mix Wish List**

- Specialty food – deli, meat
- Redevelopment of Avon Theatre space
- More retail merchandise stores with a narrow and deep focus and ability to create a cross-regional draw



- Green grocery, independent grocer
- Creative enterprises
- Build off of Ottawa St.'s central location, accessibility – digital – could locate on upper levels or back of buildings
- Put in place WiFi, broadband to attract creative businesses
- Music venues
- How to convert residential to retail
- How to change landlords who are risk-averse to take a chance on new development ideas

### **Role of Eating Establishments in the BIA**

- Eating establishments – rely on shopping traffic or are they a draw on their own
- From the background report – witness the 50/50 split in daytime traffic versus night time. Evident that many eating establishments are very busy at night when the retail merchandise stores are closed
- There is a good night time economy along Ottawa St.
- Able to increase dwell time through eating establishments, art galleries, yoga (recreation) etc. that increase sales potential for all businesses
- Observe yoga class participants who go shopping and out to eat after their yoga class

### **Types of Customers: Local versus Regional**

- Increase daytime traffic
- More employees in the area
- Still very reliant on regional visitors
- There is a mix of businesses that appeal to locals and regionals including eating establishments
- Crown Point will continue to gentrify but businesses rely on outsiders

### **Restrict Businesses**

- No offices or services on Ottawa St. (e.g., medical, massage)
- Too much of a good thing can be harmful (wary that don't want to become like Locke St. with so many restaurants)
- Want Ottawa St. to remain unique and interesting and not too much concentration in only one or two categories

### **Marketing**

- Advertise Regionally
- Have to constantly remind people that Ottawa St. is here



### **LRT**

- Will assist businesses from Main to Cannon
- The turning movements will need to be studied
- Need better bus run on streets
- Want increased traffic
- Focus on the main North / South arteries in the City, not just the West / East
- Ottawa St. N. is still a truck route for the area but able to reduce speed on street to 40 km/hour
- Work on naming the station so that it is reflective of Ottawa St. and businesses

### **Streetscaping**

- Increasing wayfinding
- Increase amount of green space on the street

### **Tactical Issues**

- Continuity of hours
- Signage for Ottawa St. on QEW



## 8.2 SWOT Summary

### Strengths

- Strong mix of retail merchandise stores based in home improvement, fabric/sewing, antiques, home décor that still draw visitors from the long distances
- Growing strength in eating establishments that serve as both an amenity to the retail shopping as well as a destination in their own right (a growing nighttime experience economy)
- Growing list of other complementary type businesses
- Positive demographic changes to the local area population
- Very good infrastructure in terms of easy access, ample parking, high visibility, gateways, etc

### Weaknesses

- Businesses are reliant on the regional visitation despite positive changes to the local neighbourhood
- The Cannon to Campbell segment is stronger than other segments of the street

### Opportunities

- An ideal time to rebrand the BIA as part of a renewed focus on the area
- Create new clusters of specialization that will have regional draw while maintaining core competencies in key home décor
- Increase goods and services for local residents and workers that matches neighbourhood gentrification
- Focus on Circular Economy as a growing trend in retail

### Threats

- Competition from other main streets



## 9.0 Changes in Recommendations from 2009/2010 to 2017/2018

The following chart summarizes the changes in the recommendations for Ottawa St. BIA from 2009/2010 to the current study period of 2017/2018.

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

2009/2010 Suggested Recommendations	2017/2018 Status Update
Prepare to increase responsibilities and staffing to move the BIA to the next goal level	This is an opportune time for the Ottawa St. BIA to redefine the BIA organization, staffing, and mandate. The BIA will be moving offices in 2018. In addition, the recent staff and board changes will allow for a new direction to take hold. Work for the BIA should include a complete refresh to re-assess the mission statement, staffing and board procedures, number of board members, committees and task forces, and eventually brand positioning.
Evolve the retail strategy away from being very dependent on price sensitivities to include a greater emphasis on experiential aspects (learning, experiential, fun, social, etc.	The business mix in Ottawa St. BIA has shifted significantly towards more experiential aspects. The number and quality of restaurants has changed dramatically.
Begin to plan for further redevelopment on the south end of the BIA and select recruitment initiatives for missing businesses	The south end is a core concern for the BIA. Programs, marketing, events, etc. have all worked to increase pedestrian movement across the entire BIA.
Continue to work on transportation issues such as truck routes and improved turning lanes from Barton Street East	Progress has been made in terms of lowering speed limits along Ottawa St. BIA.
Develop plans for key catalyst property sites such as the Avon Theatre or the former Amity building	This is a work in progress.
Develop marketing programs to move from awareness campaigns to loyalty and advocacy	While there has been good PR in the past, the BIA acknowledges that this is something that they need to refocus as a priority.
Continue to work with HABIA and the City on programs that are beneficial to the BIA	HABIA has now changed to a Committee of Council and is called Business Improvement Area Coordinating Committee. Ottawa Street BIA continues to work with the City and other BIAs on supportive programs. However, many members feel that the current structure is not working for them for sharing information and resources.



## 10.0 Vision

The Ottawa St. BIA vision from 2009/2010 was based on the following:

- Primarily focused on home décor
- Evolve into the experiential street to maintain the regional draw
- Increase consumer-related goods and services for local residents

However, as stated, this is an opportune time for the BIA to re-assess their internal procedures and BIA composition. At this time it would be important to develop a new mission statement and brand / identity structure to serve the street as it continues to evolve from home décor area to a more experiential offering.



## 11.0 Ottawa St. BIA Action Plan

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

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

Each action item includes the following elements:

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

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

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



## 11.1 Organization

### STRATEGIC GOAL

- Re-assess the BIA organization including staff, board members, and volunteers to carry out the programs along with mission statement, procedure manual, and eventually brand identity

### RATIONALE

The Ottawa St. BIA and the business district are both going through a significant change

A re-focus including an assessment of legacy procedures needs to be undertaken to ensure they match the focus for the main street and the direction of the BIA

### DESIRED RESULT

The consistency of organizational leadership that members can rely on for advocacy, internal communications, marketing, and to a limited extent economic development

### HOW TO ACCOMPLISH

The following chart highlights key suggested recommendations for the Ottawa St. BIA organization.

#### Organization Suggested Recommendations

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



<p>Review all BIA policies and procedures to ensure they align with the new vision, mission statement, and brand that will be developed</p>	<ul style="list-style-type: none"> <li>• Each month review each policy to ensure it reflects the vision and mission statement of the BIA</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure BIA has updated social media and procurement policies</li> <li>• Review and update these and other policies on a regular basis</li> </ul>	<p>BIA</p>	<p>Within one year</p>
<p>Partnerships</p>	<ul style="list-style-type: none"> <li>• Number of valuable partnerships</li> <li>• Review partnerships every six months to every year</li> </ul>	<ul style="list-style-type: none"> <li>• Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA</li> <li>• Prioritize partnerships based on current and future impact to the BIA (houses of worship, Centre on Barton including banks, social organizations such as YWCA, LRT, Hamilton Tourism, etc.)</li> </ul>	<p>BIA</p>	<p>Short to medium term</p>



<p>Review BIA boundaries</p>	<ul style="list-style-type: none"> <li>• Boundaries of BIA compared to area businesses</li> <li>• Potentially expand BIA to include all parking lots and entire Main/Ottawa St. intersection ahead of LRT</li> </ul>	<ul style="list-style-type: none"> <li>• Every two years, review boundaries and determine if changes are merited</li> <li>• BIA should develop evaluation criteria to test against potential expansion such as: do new businesses reflect a similar identity to Ottawa St. BIA, are business competitive or complementary, and pros/cons on BIA levy</li> </ul>	<p>BIA potentially in coordination with City Urban Renewal</p>	<p>Ongoing</p>
<p>Review the entire structure of the BIA including procedures, mission statement, committees, task forces, board structure, etc.</p>	<ul style="list-style-type: none"> <li>• Updated organization</li> </ul>	<ul style="list-style-type: none"> <li>• Systematically work to redevelop BIA organization suited to the new vision and aligned with new brand identity</li> </ul>	<p>BIA (may require outside assistance)</p>	<p>Short Term</p>
<p>Focus AGM and other meetings on positive learnings</p>	<ul style="list-style-type: none"> <li>• AGM participation and feedback process</li> </ul>	<ul style="list-style-type: none"> <li>• Set AGM agenda that focuses on learning, education, and positive changes</li> </ul>	<p>BIA</p>	<p>By next AGM</p>



		<p>happening in the BIA</p> <ul style="list-style-type: none"><li>• Bring in speakers on topics of relevance to BIA members including marketing techniques, Gen Z, grants, and incentives, etc.</li></ul>		
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## 11.2 Economic Development

### STRATEGIC GOAL

- Create conditions for businesses to succeed in Ottawa St. BIA

### RATIONALE

- The BIA is not responsible for the individual success or failure of its member businesses but to provide the underlying conditions to allow businesses to potentially do well.

### DESIRED IMPACT

- A diverse mix of businesses based on clustered strengths that will continue to draw regional visitation
- Long terms businesses, low turnover
- Low vacancy rates

### HOW TO ACCOMPLISH

#### Business Mix Types

- Businesses that serve as an amenity to the regional shoppers and local area workers (e.g., breakfast, lunch, snacks, cafes, errand type shopping, etc.)
- Increased night time economy (early evening) in terms of quality restaurants with added entertainment (e.g., bands, comedy, art shows, charity events, fashion shows, etc.)
- Clusters of businesses whereby each individual business has a narrow and deep focus but collectively the businesses create regional draw
- Blurring on categories to create places to socialize, interact such as barbershop that serves beverages, bookstore/café, clothing stores and a coffee shop, specialty food merchants that sell home meal replacement and prepared foods, gyms that sell activewear and have cafes
- Businesses based on the Circular Economy – antiques, repurposing items, exchange, vintage clothing, rental (tools, home décor, fashion, sewing machines, etc.), tool shed incubator
- Greengrocer and specialty food merchants
- Pharmacy, specialized medicine and health, health supplements
- Cosmetics, beauty supply
- Specialty men's, women's, and children's clothing and accessories – family clothing stores



- Interior design and home furnishings (that complements what is already available) including more custom-made furniture and home furnishings
- Pet supply stores
- Fitness – yoga, dance, recreation
- Gift type stores
- Creative offices (e.g., marketing, advertising, architect, incubator startups)

### Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Business mix targets	<ul style="list-style-type: none"> <li>• Foodservice goals were to be 12%. In 2017 it was 19%</li> <li>• The vacancy was to be lowered</li> </ul>	<ul style="list-style-type: none"> <li>• Increased food services arise from blurred categories such as barber shops that serve alcohol, a greengrocer or specialized food store that sells prepared foods, clothing stores that have a coffee shop inside, etc.</li> <li>• Focus on recruitment should be on entrepreneurs rather than a specific category as these individuals will</li> </ul>	Private landowners are primarily responsible for leasing but the BIA can help direct and massage the mix through indirect methods	Ongoing



		<p>search out gaps in the marketplace</p> <ul style="list-style-type: none"> <li>• Increased retail merchandise that has a narrow and deep retail focus (highly specialized)</li> </ul>		
BIA to take an indirect approach to business recruitment	BIA target business mix	<ul style="list-style-type: none"> <li>• Publish wish list of businesses on BIA website</li> <li>• Communicate and share the list with local brokers and landowners</li> <li>• Provide BIA website linkages to other brokerage sites and vacancy listings</li> </ul>	BIA in coordination with brokers	Medium Term
Support select residential to commercial redevelopment especially south of Cannon St. E. This could include complete redevelopment to mixed-use buildings	<ul style="list-style-type: none"> <li>• Increase number of businesses</li> <li>• Increased pedestrian flow south of Cannon St. E.</li> </ul>	<ul style="list-style-type: none"> <li>• Selectively support increased residential to commercial or mixed-use redevelopment</li> <li>• BIA could support demand through financing mixed-use impact studies</li> <li>• Increased density near the planned</li> </ul>	BIA and property owners	Medium Term



		<p>LRT stations will be an important growth opportunity</p> <ul style="list-style-type: none"><li>• Potential to add more creative office space in the BIA should be pursued</li></ul>		
<p>Encourage continued use of grants and incentives and ensure buildings and public spaces are retail-oriented</p>	<ul style="list-style-type: none"><li>• Monitor grant and incentive usage</li></ul>	<ul style="list-style-type: none"><li>• Continue to monitor usage of grants and incentives</li><li>• Have City of Hamilton staff conduct education programs on new incentives and how to apply for them</li><li>• Encourage retail friendly business design</li></ul>	<p>BIA and Urban Renewal</p>	<p>Ongoing</p>



### 11.3 Physical Improvements and Programs for Enjoyable Shopping

#### STRATEGIC GOAL

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

#### RATIONALE

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

#### DESIRED IMPACT

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

#### HOW TO ACCOMPLISH

##### Parking

- Develop a complete toolkit of solutions based on affecting supply, management, and marketing. This includes reviewing the number of publicly available spaces on-street and off-street
- Placement of maps and directional signage at the entrance to central lots
- Use digital and physical wayfinding and programs to enhance parking programs
- A marketing program to remind visitors to park in long-term lots for longer stays



### **Hours of Operation**

- Create a carrot and stick incentive program for those businesses open later in the evening and on Sundays. The BIA has a special section on their website identifying Ottawa St. BIA businesses that are open later hours and Sundays.
- Hold events at late afternoon / early evening to extend the regional visitors and workers' stay in the area (e.g., Happy Hour type programs, eating establishments on the street having free sampling trays such as a coffee shop with mini coffees, free ice cream, Jazz at 4)

### **Gateways**

- Ensure Ottawa St. BIAs gateways are kept fresh. May require replacement of some parts in the future.
- Have to determine who is responsible for upkeep, maintenance, repair, and replacement.

### **Patios**

- Encourage greater use of the patio program. The BIA has no cap on the number of patios allowed.
- Continue to assess and monitor the economic impact of the patio program. Issues related to engineering drawings required each year are being addressed and may require further refinement to ensure the program is accessible and affordable to businesses.
- Patio program can be used for other uses beyond eating establishments including retailers, social services, as well as pop up patios.

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

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

### **Proper Use of Lighting**

- Safety is paramount in terms of any discussion around lighting. For Ottawa St. BIA, lighting should be used to highlight the retail merchandise stores through amazing window displays. Efforts to hire quality window display personnel should be encouraged as well as lighting designers who can increase sales for businesses through the lighting programs.
- As a secondary purpose, lighting for restaurants and patios should focus on creating softer lights that adds to the intimate atmosphere.



- Street lighting does need to change and the BIA is working with the City on addressing safety and shopping issues especially as the BIA moves more into a night time economy role. Retailer's use of lighting in the window displays can be critical to sales and drawing people into a store. Peer pressure should be used to encourage other businesses to adopt excellent lighting and window display protocols.

### Outdoor Merchandising

- Similar to retailer lighting protocols, the businesses should be encouraged to merchandise on the street with attractive displays that draw people into the store.

### Physical Improvement Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Any streetscape plan must be vetted through the lens of economic development	A required step in any streetscape changes	<ul style="list-style-type: none"> <li>• Develop a protocol whereby streetscape changes are vetted through the lens of potential positive impacts on area businesses including trade-offs</li> </ul>	City of Hamilton and BIA	Long Term
Review parking needs in light of patio program, on-street needs, changes to technology for paying, monitoring, and enforcement	<ul style="list-style-type: none"> <li>• Measure the effect of losing one parking space on visitation, total parking revenue collected, and impact on sales of businesses using the parking space</li> </ul>	<ul style="list-style-type: none"> <li>• Test pilot parking patio program to determine if it is a net positive for the Ottawa St. BIA (were sales increase for some businesses sufficient to offset</li> </ul>	BIA and City of Hamilton Parking and Transportation	<ul style="list-style-type: none"> <li>• Patio administration program for Ottawa St. BIA is completed               <ul style="list-style-type: none"> <li>• BIA should meet with Parking and Transportation on an annual</li> </ul> </li> </ul>



		<p>potential loss to other businesses)</p> <ul style="list-style-type: none"> <li>As the nature of businesses changes, the needs of parking/deliveries often change including the location of loading zones</li> </ul>		<p>basis to review changes to parking and loading</p>
<p>Review physical and digital wayfinding</p>	<ul style="list-style-type: none"> <li>Increased visitation</li> <li>Reduced wayfinding complaints</li> </ul>	<ul style="list-style-type: none"> <li>Review with City location of wayfinding signage and determine ways to increase signage to Ottawa St. BIA</li> <li>Constantly update any digital wayfinding elements</li> </ul>	<p>BIA and City</p>	<p>Review annually</p>
<p>Review lighting in terms of safety and creating an overall experience especially as the night time economy increases</p>	<ul style="list-style-type: none"> <li>Lighting matches goals of BIA</li> </ul>	<ul style="list-style-type: none"> <li>Work with City staff and ward councillors to ensure that lighting program matches goals and objectives of the BIA members in terms of safety, retail merchandise window displays,</li> </ul>	<p>BIA and City of Hamilton</p>	<p>One year</p>



		patio dining, and the growing night time economy		
Continue to work to enhance the Ottawa St. Farmers' Market including the concept of adding permanent stalls	<ul style="list-style-type: none"><li>• Ensure vendors and retailers have input into the design</li></ul>	<ul style="list-style-type: none"><li>• Work with the City on the farmers' market stall and parking redevelopment</li></ul>	City and BIA	One to two years



## 11.4 Marketing

### STRATEGIES

- Renew or redevelop the Ottawa St. BIA brand, vision statement, and mission statement to reflect the changes in direction for the BIA and the future prospects for the main street.
- Use resources to tell the brand story and get the word out about the new direction.

### RATIONALE

- Ottawa St. BIA is a changing and evolving main street that has shifted from a focus on home décor, to fashion/food/finds, to a new direction.
- The BIA and the tools it uses to promote itself internally and externally need to reflect that momentum.
- There is work required to bring BIA members onboard and buy into the new direction and embrace the change.

### DESIRED IMPACT

- One consistent, focused brand story that will get member buy-in, attract local and regional visitation, and attract entrepreneurs and investors.

### HOW IT GETS DONE

- Develop renewed brand, vision statement, and mission statement.
- Continue to focus on regional visitation as the primary focus for marketing including increased PR campaigns.
- Bring in elements of guerilla marketing required for infrequent regional visitors to encourage longer dwell times, increased interaction on the street, and higher sales (e.g., outdoor displays, use of parking patio projects for eating establishments as well as other pop up, develop a pop up retail program, encourage retailers to have sample trays on the street to interact with passing traffic, improve wayfinding signage, event signage, and parking signage).
- Review events in light of the new brand, vision, and mission statement as part of a calendar of events program.
- Consider Free Wi-Fi as part of a loyalty marketing program that will allow the BIA to market directly to those who access the free program.
- BIA is currently producing a video for the street to highlight businesses that can be used across multiple platforms.

### Marketing Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Strategic branding exercise	<ul style="list-style-type: none"> <li>Completed brand positioning</li> </ul>	<ul style="list-style-type: none"> <li>The result would be a careful synthesis of strategic thinking about your community, your brand and your targets mapped against your business objectives. As well as consideration for what will be differentiating, engaging and motivating for the future</li> </ul>	<ul style="list-style-type: none"> <li>BIA and partner agency</li> </ul>	<ul style="list-style-type: none"> <li>Immediately</li> </ul>
Key Messaging Hierarchy	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li>A matrix which links key messages to your Promise, Benefits, and Positioning and expresses your brand position</li> <li>Individual messages for each of your separate target groups</li> </ul>	BIA	<ul style="list-style-type: none"> <li>Short Term</li> </ul>



Brand identity creation	<ul style="list-style-type: none"><li>• Brand guidelines</li></ul>	<ul style="list-style-type: none"><li>• Strategy and partner agency team/creative team develop the new identity (logo, symbols, colour palette etc.) and tagline options based on the approved strategic direction. This would include identity options that link to the identified assets and differentiators of the BIA</li></ul>	<ul style="list-style-type: none"><li>• BIA and partner agency</li></ul>	<ul style="list-style-type: none"><li>• Short term</li></ul>
Brand communication toolkit development	<ul style="list-style-type: none"><li>• Toolkit</li></ul>	<ul style="list-style-type: none"><li>• The agency/creative team creates application guides and templates for brand communication. A document &amp; digital format guide for use by and for all future marketing communications</li></ul>	<ul style="list-style-type: none"><li>• BIA and partner agency</li></ul>	<ul style="list-style-type: none"><li>• Short term</li></ul>



## 12.0 Planning Context

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

### 12.1 Introduction

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

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

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

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

When a new regulation comes into effect after a property has been developed, the existing use and structure is allowed to continue to operate even if it does not comply with the new regulations (called a "legal non-conforming use"). However, it is required to comply if redeveloped. The Plan and Zoning By-law recognizes many existing uses that don't conform to the new policies and regulations through site-specific exceptions so that they can avoid "non-conforming" status and expand and alter their buildings without additional review (for example, existing drive-through businesses might be given site-specific exceptions in C5a zones so that they can alter their buildings and sell to other similar operators).

Hamilton completed a comprehensive review of its Official Plan and Zoning By-law policies for Commercial and Mixed Use Areas in 2017. The Official Plan policies and associated Zoning By-law amendments (By-laws 17-239 and 17-240



respectively) were adopted by City Council in October 2017. The Amendments are not yet fully in effect since some objections about the new regulations were received. These will be reviewed and considered in the coming months, and if the City is unable to resolve the issues they raise an Ontario Municipal Boarding Hearing will be scheduled.

This creates some technical complications for development in the interim. Both the current Official Plan and the Official Plan Amendment are reviewed when development applications are received. The specifics of any given situation will influence the process that is followed by the City of Hamilton. As a general guide, development proposals that conform to the new policies but not to the old usually need to apply for amendments to the existing regulations but are likely to have the City's support in doing so. Proposals that conform to the old policies but not the new ones are generally required to comply so as to avoid creating a future "legal non-conforming" status.

In the interests of simplicity, the following summary only discusses the Official Plan and Zoning By-law as adopted by City Council in October 2017.

**The following is a summary of the planning context for the BIA for the purposes of general information only. For example, the many property-specific exceptions to the general regulations are not provided. Anyone wanting to know the detailed regulations impacting the development of a specific property is encouraged to contact the City of Hamilton before proceeding with planning building alterations, new development, leasing or purchasing property, etc.**

## **12.2 Official Plan and Zoning By-law Designations for the Ottawa Street BIA**

Hamilton's Official Plan designates most of the Ottawa Street BIA a "Mixed Use - Medium Density Area" (the only exceptions are two church sites at Cannon Street and north of Roxborough which are designated "Neighbourhood Institution" and the Tim Hortons at Dunsmure which is designated "Community Shopping"). This designation permits a full range of retail, service commercial, entertainment and residential accommodation at a moderate scale. The areas are intended to serve the surrounding community and to evolve and intensify into a mixed-use, pedestrian-oriented areas (Section 4.6 of the Plan). The Plan's policies for Mixed Use – Medium Density Areas are implemented by C5 zoning.

Ottawa Street BIA also is designated a "Pedestrian Focus Street" which layers on additional policies to better ensure a comfortable, active and visually stimulating walking environment intended to support and reinforce their success as shopping districts. (Section 4.3 of the Plan). These policies are implemented by C5a zoning.



### 12.3 Permitted and Restricted Land Uses

C5a zoning permits a wide range of commercial, institutional and residential uses with the following exceptions and conditions:

- Garden Centres (unless an accessory use), motor vehicle dealerships, gas bars and service stations, drive-through businesses, studios, tradesperson's shops, transportation depots, and commercial parking facilities unless wholly contained on the upper and below grade floors of a building are not permitted,
- Dwelling units, day nurseries and places of worship are only permitted on the upper floors of buildings (not on the ground floor),
- Beverage making establishments, catering services, commercial entertainment, commercial recreation, and microbreweries are only permitted on the ground floor (not on the upper floors),
- The maximum gross floor area for office and commercial recreation uses is 2,500 square metres,
- The maximum size for microbreweries is 700 square metres.

The Official Plan's Pedestrian Focus Street Designation includes additional guidelines to be used in the development approval process and when considering rezoning applications:

- While gas bars and car washes are prohibited, drive-through businesses may be permitted if it can be shown that they can't be located in other Mixed Use – Medium Density areas. It must be demonstrated that it doesn't preclude the creation of a comfortable, active and visually stimulating walking and shopping environment and a streetscape with buildings and storefronts oriented to the street. (Section 4.6.29).
- Residential uses are permitted at grade (through a rezoning process).
- Large single-use buildings over 5,000 square metres are encouraged to locate in the rear or interior of the site with smaller footprint buildings located close to the sidewalk. Alternatively, larger stores may be located up to the street line provided they are lined with smaller stores, multiple entrances or other similar means to animate the streetscape (4.6.21).

### 12.4 Height, Built-form, and Design

The Zoning By-law specifies a minimum height of 7.5 metres (2 storeys) and maximum height of 22 metres (6 storeys) in C5a areas. The Official Plan permits heights up to 8 storeys through a zoning by-law amendment provided that the structures are stepped back from adjacent properties and the street and don't have adverse shadow impacts on adjacent residential uses (see 4.6.8 for detail).

- The maximum setback from the street is 3.0 metres. There is no minimum setback.



- New buildings must have ground floor facades at least equal to 75% of the lot width and on corner lots at least 50% of the combined lot widths. Parking or aisles/stacking lanes are not permitted between the building façade and the sidewalk. At least 1 principal entrance is required within the ground floor façade that is directly accessible from the sidewalk.
- A minimum of 60% of the area of the ground floor façade facing the street must be composed of windows and doors.

The Official Plan indicates that in areas that don't have a secondary plan (which is the case for the Ottawa Street BIA), development applications must include a concept plan that addresses how (i) the creation of a vibrant people place is being achieved, (ii) the pedestrian experience is being improved in the public and private realm, and (iii) the property will intensify over time (4.6.23).

### **12.5 Parking Requirements**

New development or change of use in the Ottawa Street BIA is required to meet parking requirements that are specified in the Zoning By-law. The required parking spaces are to be provided on the same site. Where this is not physically possible, an agreement can be entered into with another property within 300 m. to supply the required parking or the developer can apply to the City to make a cash payment in lieu of parking. These funds are used by the City to build collective public parking lots.

The parking schedule is quite detailed and specific for different uses (See Section 5.6(c) of By-law 05-200). The By-law amendment passed by Council in October 2017 but which is not yet fully in force (By-law 17-240) significantly reduces or eliminates the requirements for many uses in C5 and C5a Zones. A few examples are:



### Parking Requirements for Ottawa St. BIA Area

	<b>Current By-law</b>	<b>Amendment 17-240</b>
Multi-residential with 1 – 14 Units	0.3 spaces per unit for units 50 m <sup>2</sup> or less 1 space per unit for units larger than 50 m <sup>2</sup> .	0.3 spaces per unit for units 50 m <sup>2</sup> or less 0.7 spaces per unit for units larger than 50 m <sup>2</sup> . A maximum of 1.25 spaces per unit is permitted.
Retail Uses	1 space per 20 m <sup>2</sup>	0 spaces for first 450 m <sup>2</sup> 1 space per 17 m <sup>2</sup> of space between 450 and 4000 m <sup>2</sup> .
Personal Services	1 space per 16 m <sup>2</sup>	0 spaces for first 450 m <sup>2</sup> 1 space per 16 m <sup>2</sup> above 450 m <sup>2</sup>
Offices	1 space per 30 m <sup>2</sup>	0 spaces for first 450 m <sup>2</sup> 1 space per 30 m <sup>2</sup> above 450 m <sup>2</sup>
Restaurants	1 space per 8 m <sup>2</sup> and for take-out restaurants, at least 3 spaces	No change

By-law 17-240 also requires 5 short-term bicycle parking spaces per unit for many types of commercial uses in C5 and C5a districts and a requirement for long-term spaces in new buildings or additions. It includes an additional incentive for providing long-term bicycle parking spaces by permitting a reduction of 1 vehicle parking space for every 5 long-term bicycle spaces that are provided (reduction is capped at 10% of the vehicle parking requirement). In addition, vehicle parking can be reduced by 1 space for every 15 m<sup>2</sup> of locker, change room or shower facilities that is specifically accessible to the users of the long-term bicycle parking (refer to Sections 5.10, 5.11 and 5.12(g) for specific details).



### **12.6 On Street Patio Program**

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



### 13.0 Trends and Best Practices

Trends are based on three overarching themes:

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

#### RETAILER AND COMMERCIAL BUSINESS TRENDS

##### Omni-channel

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

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

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

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



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

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

### **Smaller Retail Formats**

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

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

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

### **Mobile**

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

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

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



## **Technology Driven Innovation**

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

- Sensor-based technology
- Big data
- Online

### ***Sensor-Based Technology***

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

### ***Big Data***

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

### ***Online***

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

## **FOOD SERVICE TRENDS**

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



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

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

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

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

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

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



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

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



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

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

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

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

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

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



## CONSUMERS CHANGE TRENDS

### **Buy Low Buy High**

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

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

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

### **Demographics is Destiny**

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

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

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

## ORGANIZATION AND GOVERNANCE BEST PRACTICES

### **Leadership is King**

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



key examples whereby one dollar of private sector money is matched by the municipality and/or other fundraising or sponsorship or grant monies to produce much greater results than would be if the programs were not in place.

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

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

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



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

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

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

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



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

## **PHYSICAL DESIGN BEST PRACTICES**

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

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

#### **1. Safety**

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

#### **2. Cleanliness**

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

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

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



## **Signage**

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

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

## **Urban Plazas**

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

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

## **Useable Outdoor Space**

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

## **Showcase windows**

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



### **Loading access**

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

### **Garbage collection**

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

### **Access/egress**

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

### **Attractiveness**

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