



Westdale Village BIA
Commercial Market Assessment Update

FINAL
August 2018

Prepared by:
360 Collective
99 Ivy Ave, Suite 100
Toronto, ON M4L 2H8
www.360collective.co
647 339 9008

with support by:
Page by Page Consulting





TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	1
BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS.....	19
1.0 Introduction.....	20
2.0 Visitors to Westdale Village BIA.....	21
2.1 Vehicular and Pedestrian Movement Along King St. W. in Westdale Village.....	21
2.2 On-Street Parking.....	23
2.3 Pedestrian Traffic.....	25
3.0 Trade Area Analysis.....	29
3.1 Household Expenditure.....	37
3.2 Other Major Target Markets and Customer Visitation.....	40
3.3 Customer Visitation Data.....	42
4.0 Quality of Life Statistics –Housing Prices.....	51
4.1 Housing Prices.....	51
5.0 Commercial Audit and Rent Review.....	52
5.1 Rent and Land Value Analysis.....	56
6.0 Westdale Village BIA Website Review.....	58
7.0 Investment in Westdale Village BIA.....	63
8.0 Key Person Interviews.....	71
9.0 Strengths Weakness, Opportunities, and Threats.....	77
9.1 Workshop #1 Feedback.....	77
9.2 SWOT.....	79
10.0 Changes in Recommendations from 2009/2010 to 2017/2018.....	80
11.0 Vision.....	81
12.0 Westdale Village BIA Action Plan.....	82
12.1 Organization.....	83



12.2	Economic Development.....	87
12.3	Physical Improvements and Programs for Enjoyable Shopping	91
12.4	Marketing.....	95
13.0	Planning Context.....	96
13.1	Introduction	96
13.2	Official Plan and Zoning By-law Designations for the Westdale Village BIA.....	97
13.3	Permitted and Restricted Land Uses	98
13.4	Height, Built-form and Design	99
13.5	Parking Requirements.....	99
13.6	On Street Patio Program.....	101
14.0	Trends.....	102



EXECUTIVE SUMMARY

Executive Summary

Introduction

360 Collective was retained by the City of Hamilton (City) and Westdale Village Business Improvement Area (BIA) to undertake an update of the previous commercial market assessment of the Westdale Village 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
- 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
- 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 are based on the findings of that workshop.

Westdale Village BIA





SWOT

Strengths

- Distinctive identity based on geographic location, building types and facades, street layout
- Set in an affluent neighbourhood of higher income, well educated, and sophisticated residents
- Attracts regionally due its business mix and long history as a viable main street area
- High daytime population that includes students, local area workers, local residents and stay at home residents (e.g., retirees, home makers, etc.)
- Many businesses that have developed highly specialized focus that collectively creates a draw for Westdale Village BIA

Weaknesses

- Small business district and isolated from the Main Street
- Transient nature of the student population means that extra effort must be spent each and every year to convince students to visit Westdale Village BIA (no equity in the marketing capital outlays year after year)
- Polarized target markets of young students who often have limited budgets and an older and retired based on seniors
- Very low population growth

Opportunities

- Common food service eating establishments that cater to both students, workers, and local residents
- Blurring retail categories that allow a business to sell goods and services but also allows them to create more social gathering and community building type businesses

Threats

- Other main streets in the area that have created a strong identity and brand and are attracting students and others to shop, dine, and hang out
- LRT may change bus routes through Westdale Village and remove the accessibility feature of the Village to this target market



Changes in Recommendations from 2009/2010 to 2017/2018

The following are noted changes in Westdale Village BIA in terms of suggested recommendations in 2009/2010 and the currently market assessment report in 2017/2018.

Changes in Recommendations from 2009/2010 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Renew committee work by each one setting strategic goals, tactics to accomplish the goals, and reporting structure to the main board meetings	The BIA has recently re-emerged with a renewed structure and Executive Director. New committee work will take time to begin. Often BIAs are now using a Task Force structure for their members rather than committees. Task Forces can be short lived and focused on timely, short-term outcomes. This can be more appealing for members to join in rather than a long-term commitment associated with a committee.
Work towards improved partnerships, especially with students and other McMaster organizations	Increasing partnerships is an ongoing initiative but one that Westdale Village BIA embraces
Increase communications with members	With the absence of an Executive Director at the BIA for several months, the communication protocols were not followed. With a new Executive Director, renewed communication programs are being put back in place.
Market the Westdale Village experience to both local and regional target markets that have similar common attributes	This is an ongoing debate within the BIA and business members on who and how much should be allocated for different target markets. The focus on creating business cluster videos will have cross market appeal for locals and regional visitors.
Make Westdale Village a venue for events and activities that are supported by the BIA but not necessarily run by the BIA	BIA has embraced an entertainment focus through programming multiple events throughout the year, but the bulk will be during the slower summer period with approximately one event per week. These events will be designed such that the street will not have to be closed.
Continue improvements on beautification-type programs	This is ongoing



Develop ways to increase use of façade improvement programs	The change in the incentive program requires a renewed marketing push to let businesses understand how they can use the incentives for the betterment of their business and the village.
Continue to work with HABIA and the City on programs that are beneficial to the BIA	HABIA's name is now Business Improvement Area Coordinating Committee. It is now a Committee of Council. Westdale Village BIA continues to work with the City and other BIAs on supportive programs.

Vision

The Westdale Village BIA vision remains the same as in 2009/2010. It will be a:

- Smart, schooled, cultured niche
- Intellectual meeting place with entertainment (note not late night)
- Strict design standards and business standards

To the vision is added a stronger emphasis on being an entertainment hub.



Westdale Village BIA Action Plan

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

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

Each action item includes the following elements:

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

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

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

RATIONALE

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

DESIRED RESULT

- 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 highlights key suggested recommendations for the Westdale Village BIA organization.

Organization Suggested Recommendations

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



policies – social media and procurement	they were last updated	procurement policies <ul style="list-style-type: none"> Review and update these and other policies on a regular basis 		
Partnerships	<ul style="list-style-type: none"> Number of valuable partnerships Review partnerships every six months to every year 	<ul style="list-style-type: none"> Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA Prioritize partnerships based on current and future impact to the BIA (McMaster, residents' associations, schools, police, Columbia College,, Westdale Theatre, etc.) 	BIA	Short to medium term
Review BIA boundaries	<ul style="list-style-type: none"> Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> Every two years, review boundaries and determine if changes are merited 	BIA potentially in coordination with City Urban Renewal	Ongoing



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



		members including marketing techniques, Gen Z, grants and incentives, etc.		
--	--	--	--	--



Economic Development

STRATEGIC GOAL

- Create conditions for businesses to succeed in Westdale Village 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

- Long terms businesses, low turnover
- Low vacancy rates
- Clusters of strength that draw visitors to shop and visit

HOW TO ACCOMPLISH

Business Mix Types

- The business mix will be a combination of local serving businesses for students, workers, and local residents (e.g., lunch, cafes, errands) as well as destination type businesses including gift giving and specialty needs.
 - Blurring of categories to create places to socialize, interact such as barber shop that serves beverages, book store/café, game/cafes, escape rooms, clothing stores and a coffee shop, specialty food merchants that sell home meal replacement and prepared foods, gyms that sell activewear and have cafes (note many of these stores exist in Westdale Village BIA)
 - Green grocer 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, activewear
 - Interior design and home furnishings
 - Quick casual restaurants that serve lunch and dinner
 - Fitness/Entertainment – yoga, dance, recreation, virtual reality and escape/game rooms (including active wear clothing)
 - Gift type stores



Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Business mix targets	<ul style="list-style-type: none"> Food service goals were to be within 15% to 20%. In 2017 it was 24% Retail merchandise goals were to be 23% to 30%. In 2017 it was 13% 	<ul style="list-style-type: none"> A focus on quality eating establishments is key If the goal is to pursue a greater entertainment type vision, then higher proportion of food is acceptable but it should not come at the peril of less retail merchandise. Food services does require retail merchandise to function well and provide a balance. 	Private landowners are primarily responsible for leasing but the BIA can help direct and massage the mix through indirect methods	Ongoing
BIA to take an indirect approach to business recruitment	BIA target business mix	<ul style="list-style-type: none"> Publish wish list of businesses desired in Westdale Village Communicate and share list with local brokers and landowners 	BIA in coordination with brokers	Medium Term



		<ul style="list-style-type: none"> • Provide BIA website linkages to other brokerage sites and vacancy listings 		
Support select residential intensification and infill	<ul style="list-style-type: none"> • Population growth greater than 0.5% annually 	<ul style="list-style-type: none"> • Selectively support increased residential intensification in the greater Westdale and Ainslie Woods areas • BIA could support demand through financing residential and mixed-use impact studies • Review three story maximum height limits in the BIA 	BIA and property owners	Medium Term
Encourage continued use of grants and incentives and ensure buildings and public spaces are retail oriented	<ul style="list-style-type: none"> • Monitor grant and incentive usage 	<ul style="list-style-type: none"> • Continue to monitor usage of grants and incentives • Have City of Hamilton staff conduct education programs on new incentives and 	BIA and Urban Renewal	Ongoing



		<p>how to apply for them</p> <ul style="list-style-type: none">• Encourage retail friendly business design		
Pop Up shop	<ul style="list-style-type: none">• Feedback on shop	<ul style="list-style-type: none">• BIA may consider one or two sites in the BIA for a potential pop up shop or outside vendor (may be a physical store front, a parking spot converted to pop up shop through the patio program, or a mobile vendor, etc.)• Vendor would rotate on a continual basis• Issues such as rent, insurance, and licensing need to be addressed in this type of program	BIA and property owner and Urban Renewal could develop a program that uses the City of Hamilton's Temporary Business License Program	Medium to Long Term



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 Westdale Village.

DESIRED IMPACT

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

HOW TO ACCOMPLISH

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



Physical Improvement Suggested Recommendations

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



Review physical and digital wayfinding	<ul style="list-style-type: none"> • Increased visitation • Reduced wayfinding complaints 	<ul style="list-style-type: none"> • Review with City location of wayfinding signage and determine ways to increase signage to Westdale • Constantly update any digital wayfinding elements 	BIA and City	Review annually
Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases	<ul style="list-style-type: none"> • Conduct a study 	<ul style="list-style-type: none"> • Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy 	BIA and City of Hamilton	One year
With parking technology changes ensure that Westdale visitors embrace the new changes and sign up for mobile parking	<ul style="list-style-type: none"> • Work with City 	<ul style="list-style-type: none"> • Work with City on any co-marketing programs on parking change awareness 	City and BIA	One to two years



12.4 Marketing

CONTEXT

- The Westdale brand is well established and the BIA is making use of the brand to gain increased attention.

STRATEGIES

- Review events and follow through with BIA plan to add more entertainment based events throughout the year including the slow summer season
- Through partnerships, leverage marketing dollars to amplify the voice of the BIA to key target markets such as students, health care, regional visitors, etc.

RATIONALE

- Westdale Village BIA has a strong recognizable brand but it needs partnerships to amplify it for select target markets
- Westdale Village is ideally suited for increased entertainment and through placemaking and event programming the BIA can ensure that it is lively throughout the year and specifically during the shoulder season when students are not in the area.

DESIRED IMPACT

- One consistent, focused brand story that will attract select target markets to visit as well as any investors or would be businesses

HOW IT GETS DONE

- BIA to continue to tweak the Westdale BIA brand to ensure it stays relevant but overall there are no major changes envisioned.
- Develop a coordinated year events and promotions calendar
- Review all partnerships with the aim of amplifying the voice of the BIA
- Coordinate marketing with other messages such as parking, mobile payment, keeping noise and nuisance issues down, etc.
- Consider using Free Wi-Fi as a loyalty program that enables the BIA to market directly to visitors using the program.



BACKGROUND REPORT AND SUGGESTED RECOMMENDATIONS



2.0 Visitors to Westdale Village BIA

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

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

2.1 Vehicular and Pedestrian Movement Along King St. W. in Westdale Village

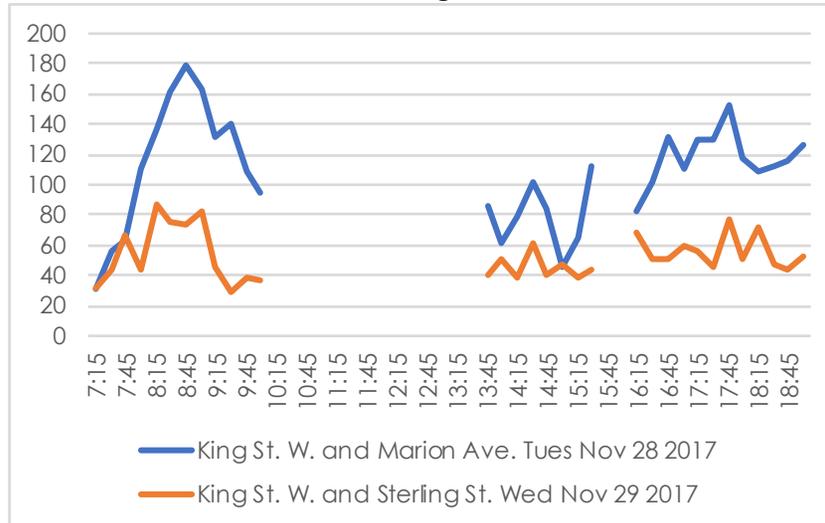
Vehicular and Pedestrian Volume 7 and 8-Hour Counts at Key Intersections along King St.

Intersection	Date	8-hour Vehicular Count	8-Hour Pedestrian Count
King St. W. and Marion Ave.	Tues. Nov. 28 2017	6,442	2,099
King St. W. and Sterling St.	Wed. Nov. 29 2017	5,522	1,061

Source: City of Hamilton

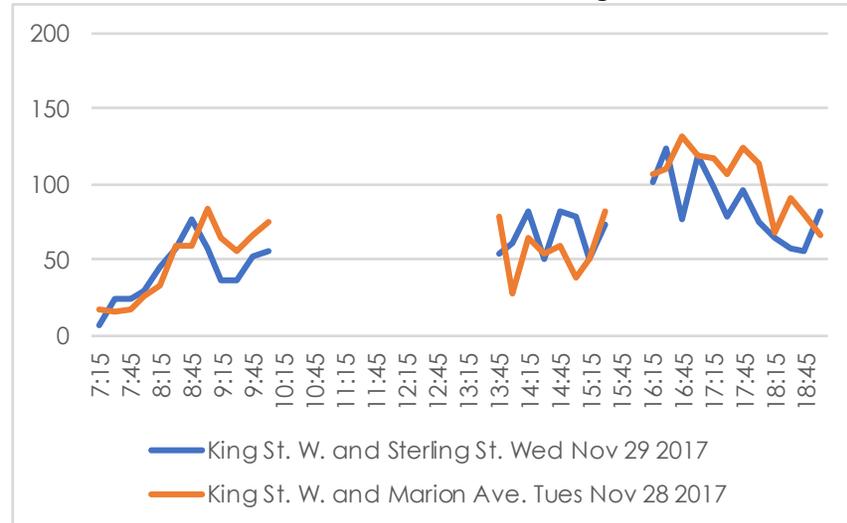
Focusing on movement directly on King St. W. the following graph illustrates vehicular traffic throughout the day for eastbound and westbound traffic.

Vehicular Traffic Patterns on King St. W. for Eastbound and Westbound Vehicular Traffic in Westdale Village BIA



Westbound

Source: City of Hamilton



Eastbound

Findings for King St.

- Westbound traffic is higher than eastbound.
- Westbound peaks in the early morning following commuting patterns to the university and hospital. There is a westbound secondary peak in the early evening.
- Westbound traffic diverts at Sterling St. to the university rather than continuing on King St. W. further west.
- Eastbound traffic peaks in the late afternoon/early evening.
- Businesses on the north side of King St. W. should be able to take advantage of the morning commute and likewise businesses on the south side of King St. W. should be able to take advantage of the evening commute.
- Traffic patterns after 7:00 pm is sustained which helps to support the night time economy.

Implications for Westdale Village BIA

- Accessible parking on the south side of King St. W. in Westdale Village is essential to encourage the late afternoon/early evening commuters to stop and pick up their errands, food for dinner, home meal replacement items, etc.



- Encourage stores to stay open later to take advantage of the early evening movement occurring in Westdale Village particularly food-oriented businesses.

2.2 On-Street Parking

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

On-Street Parking Meter Revenue

Year	Total On-Street Parking Revenue	Number of On-Street Meters	Revenue Per Meter
2012	\$135,465.44	105	\$1,290
2013	\$132,801.62	105	\$1,265
2014	\$128,893.82	105	\$1,228
2015	\$121,276.30	105	\$1,155
2016	\$121,151.08	105	\$1,154

Source: City of Hamilton

*In June 2017, the on-street parking rate increased from \$1.00 to \$1.50

Findings

- There is free parking during the month of December.
- Parking revenue per meter can be used as a proxy for visitation.
- Overall, there is a very high usage of the parking meters throughout the year.
- Each parking spot is occupied approximately four hours of every day.
- The revenue per meter has been falling from 2012 to 2015. In 2015, it stabilized.
- This reflects a shift in the visitation profile towards serving more local residents and university students and faculty and less destination visitors.

Implications for Westdale Village BIA

- Westdale Village businesses rely on a combination of local residents, students, faculty/staff, and regional visitation.
- The shift in business mix towards an increase in fast, casual restaurants and less on apparel and accessories has resulted in more reliance on the local population and students, staff, and faculty nearby and less on regional visitation. That being said, the on-street parking usage still remains relatively high despite the slight decline.



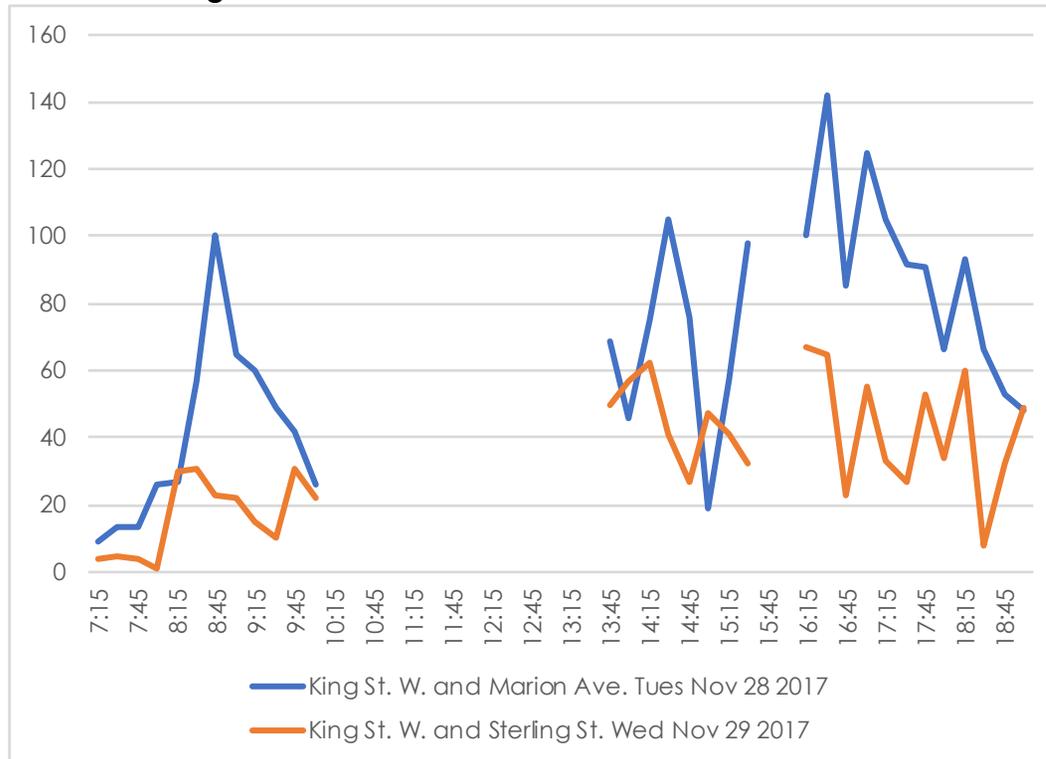
- According to the City of Hamilton, mobile payment for parking and credit card payment at off-street lots should be able to be rolled out in 2018/2019. BIAs should look for and participate in increased education and marketing of these services in relation to their customers and visitation.



2.3 Pedestrian Traffic

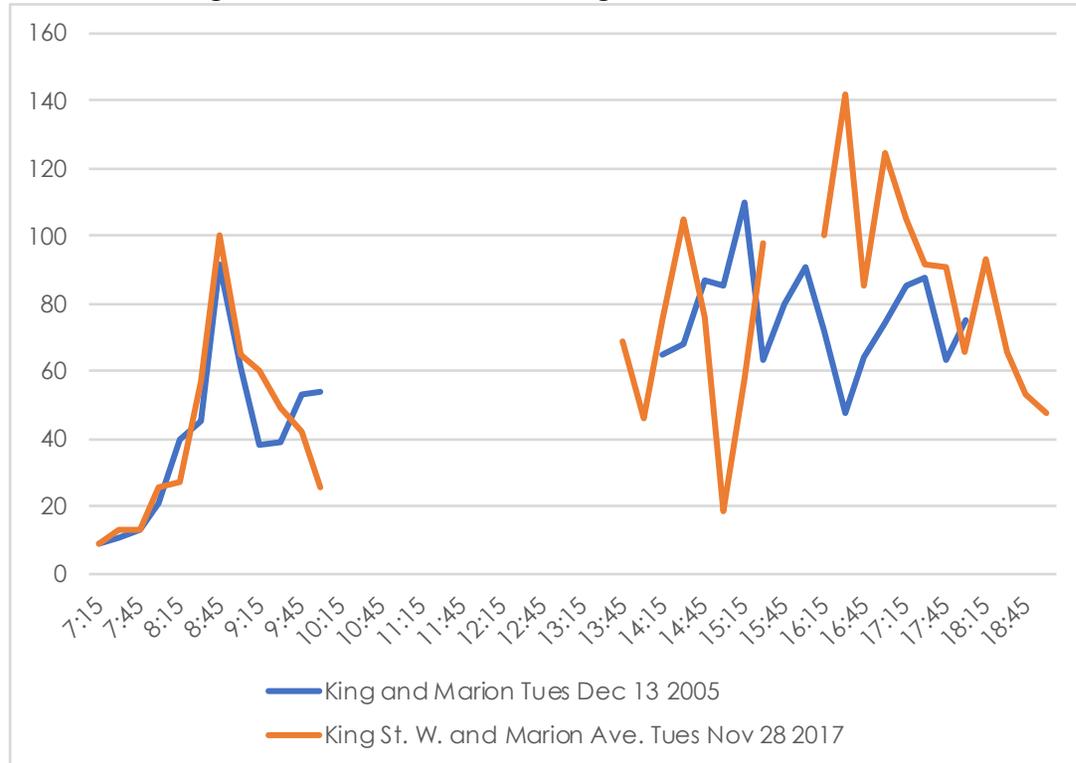
Average pedestrian traffic at the two major intersections in Westdale Village varies with King St. W. and Marion Ave. having the highest volume.

Westdale Village Pedestrian Counts – 15 Minute Intervals



Source: City of Hamilton

Westdale Village Pedestrian Counts at King St. W. and Marion Ave from 2005 to 2017 – 15 Minute Intervals



Source: City of Hamilton

Findings

- There is a morning commute spike as well as an late afternoon spike at King St. W. and Marion Ave.
- Pedestrian traffic throughout the day is relatively consistent ranging from 40 to 100 people every 15 minutes (160 to 400 people per hour).
- In the evening, there is a decrease in pedestrian traffic but there is a base level of pedestrian traffic that is going out to the nearby restaurants and other activities.
- The pedestrian traffic pattern and volume at King St. W. and Marion Ave. are similar from 2005 to 2017 with a slight increase in pedestrian traffic in the afternoon.

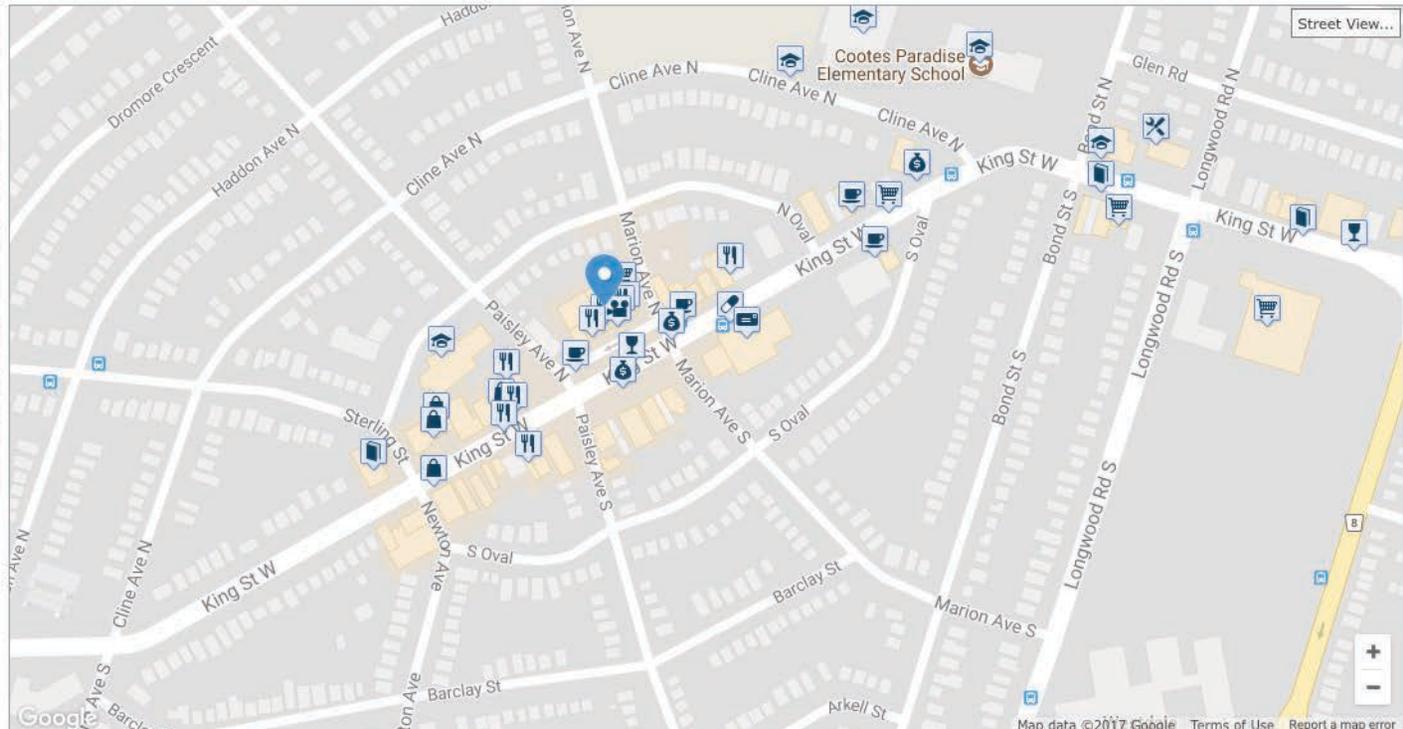


- According to Walk Score, the address 1014 King St. W., has a Walk Score of 89 and a Transit Score of 64. Westdale Village achieves a high Walk Score because it is very accessible to a wide range of goods, services (drug store, library, banks, cafes, restaurants, other shopping, university, health services, etc.), and activities by foot. However, it is decreased access to these activities via transit.

Westdale Village Walk Score – Nearby Amenities

What's Nearby

Restaurants:	
Dragon Court Restaurant	.06km
Coffee:	
Kuma's Candy	.07km
Bars:	
1010 Bistro	.08km
Groceries:	
Real Food Market & Kitchen	.07km
Parks:	
Churchill Park	.5km
Schools:	
Kehila Jewish Community Day1km
Shopping:	
White Elephant	.2km
Entertainment:	
Westdale Theatre	.09km
Errands:	
Shoppers Drug Mart	.08km
Search Nearby:	

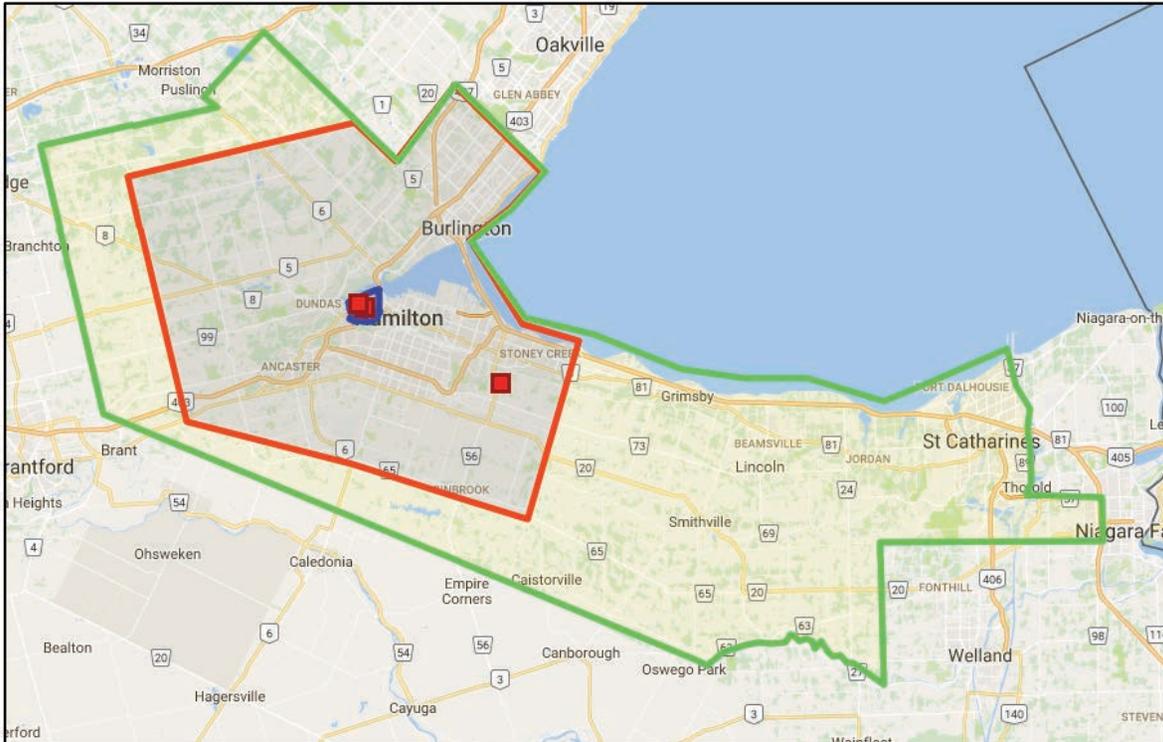


Implications for Westdale Village BIA

- Businesses need to adjust their hours of operation to when there are pedestrian spikes. This includes cafes opening during the early morning commute, adjusting to the early afternoon spike when schools let out, and staying open longer in the evening to take advantage of the traffic that extends past the 7:00 pm time frame.
- While vehicular/parking and pedestrian counts are good, they have been stagnant for the last few years, The BIA needs to continue to draw visitors into the area as the local neighbourhood population is not high enough to support the range of goods and services available.

3.0 Trade Area Analysis

The trade areas for Westdale Village BIA were established in the previous Commercial Market Assessment reports. They focused on the immediate areas of Westdale and Ainslie Woods. The regional visitation was based on the surrounding urban and rural areas.





Trade areas include:

- Immediate Trade Area: Westdale Village, McMaster University, Ainslie Wood (to Leland Street and Cootes Drive, and McMaster Innovation Park. This area is within an easy 10-minute walking distance of the BIA.
- Primary: built up areas of the City of Hamilton including portions of Dundas, Stoney Creek, Ancaster, Flamborough / Waterdown, and Burlington
- Secondary Trade Area: the balance of the City of Hamilton, portion of the Niagara Region including Grimsby, Lincoln, and West Lincoln.
- City of Hamilton

Population, Households, and Daytime Workers

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
2011 Population	8,361	669,118	920,178	519,950
2017 Est. Population	8,305	695,075	954,254	566,276
Annualized Population Growth Rate	-0.1%	0.8%	0.7%	0.9%
2017 Est. Households	3,466	290,944	396,212	223,175
Annualized Household Growth Rate	0.0%	1.1%	0.9%	0.9%
Daytime Worker Population	3,047	25,555	65,909	238,346

Source: Statistics Canada, Environics Estimates 2017

Findings

- Within a 10-minute walk from Westdale Village BIA, there is a target market population of 8,305 residents as well as over 3,000 workers. Within McMaster there are over 11,000 workers.
- The population has been stable from 2011 to 2016.
- Many older families are opting to age in place rather than shift to smaller housing units.



Age Profile, Gender, and Ethnicity

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Age Profile				
0 to 9	9%	11%	11%	10%
10 to 19	13%	12%	12%	11%
20 to 29	24%	13%	13%	14%
30 to 39	10%	12%	12%	12%
40 to 49	1%	13%	13%	15%
50 to 59	12%	15%	15%	14%
60 to 69	9%	11%	12%	10%
70+	11%	12%	12%	12%
Median Age	33.2	42.0	42.3	41.6
Gender				
Male	50%	49%	49%	49%
Female	50%	51%	51%	51%
Ethnicity				
Visible Minority	33%	19%	17%	19%
1st Generation Canadian	30%	26%	24%	26%
2nd Generation Canadian	23%	25%	25%	25%
3rd Generation Canadian +	47%	49%	52%	49%

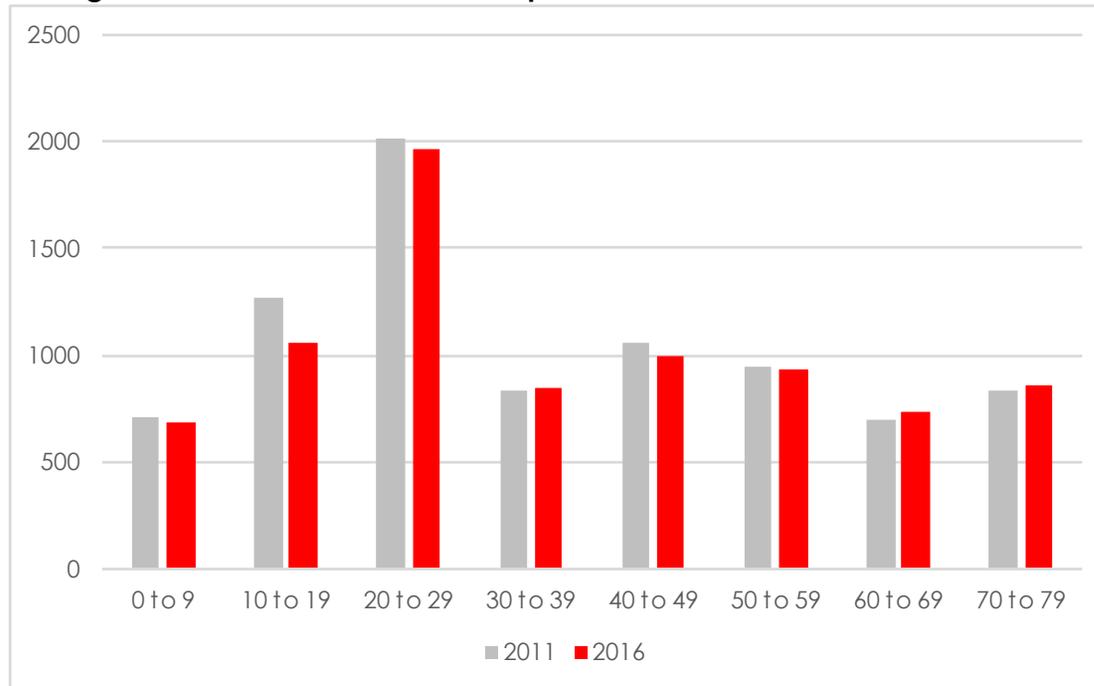
Source: Statistics Canada 20162

Findings

- Increasingly, the Westdale Immediate Trade Area is characterized by university students.
- 20 to 29 year olds account for one-quarter of the total population.
- There is still a sizeable older family with teenaged children present in the area. The teenagers also account for university and college students living in the area.
- Within the Immediate Trade Area, there is a higher proportion of visible minorities. This is reflective of the changing profile of Ontario post-secondary institutions.

- However, 47% of the residents are third generation Canadian or higher. This suggests that local residents and students are more similar to other Canadians.

Change in Westdale Ainslie Wood Population – 2011 to 2016



Source: Statistics Canada 2011 2016

Findings

- There has been little movement in the total age from 2011 to 2016.
- Young adults 20 to 29 years of age are by far the dominant age category. They have remained relatively constant.
- There is a decline in the number of teenagers.
- There is a slight growth in the senior population over 60 years of age as well as a small baby boom.
- As stated, the senior population is opting to age in place in Westdale rather than shifting to smaller units.



Household Size and Marital Status

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Household Size				
1 Person	35%	28%	27%	28%
2 Person	29%	32%	33%	32%
3 Person	15%	16%	16%	16%
4 + Person	21%	24%	24%	24%
Person Per Household	2.4	2.5	2.5	2.5
Marital Status				
Single	42%	28%	27%	29%
Married, Common Law	45%	56%	57%	55%
Separated, Divorced, Widowed	13%	16%	16%	16%

Source: Statistics Canada 2016

Findings

- Within the Immediate Trade Area, there is a high proportion of single residents as well as one person households. This marks a continued shift in the local area away from families and more towards young students and young professionals living the area.
- The household size is relatively high suggesting many students are living together.
- However, the Immediate Trade Area does retain a strong family focus including young children.

Education, Occupation, and Home Ownership

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Education				
Less than High School	10%	18%	18%	20.0%
High School Graduate	25%	28%	28%	28.0%
College, Diploma	16%	28%	30%	30.0%
University Graduate	49%	26%	24%	22.0%
Occupation				
Management	22%	26%	25%	24%
Science	7%	6%	6%	6%
Health	7%	7%	7%	8%
Govt, Ed., Social Services	27%	12%	12%	12%
Arts, Culture, Recreation	5%	3%	3%	3%
Sales and Service	18%	24%	24%	24%
Other	1%	19%	20%	23%
Labour Force Participation	62%	64%	64%	64%
Housing Tenure				
Own	54%	70%	72%	68%
Rent	46%	30%	28%	32%

Source: Statistics Canada 2016

Findings

- The presence of the university and number of professionally employed residents including those at the university, health centre, and innovation centre support the finding that residents in the Immediate Trade Area are well educated.
- A high proportion work in government, education, health, and science fields.
- The labour force participation rate is relatively high.
- As stated, there is both a combination of professional employed households and families as well as young students living in the Immediate Trade Area. This is reflective in the fact that 46% of residents rent their home.



Travel to Work

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Travel to Work				
Vehicle - Driver or Passenger	61%	83%	86%	83%
Public Transit	16%	11%	9%	10%
Walk	16%	4%	4%	5%
Bike	7%	1%	1%	1%
Other	1%	1%	1%	1%

Source: Statistics Canada 2016

Findings

- Local residents in the Immediate Trade Area rely heavily on vehicular transportation to get to and from work. 61% drive or are driven to work.
- The use of public transportation is relatively high but not as high as Downtown Hamilton.
- There is a very high proportion of residents who walk or take a bicycle to work as many residents prefer to live closer to their work.



Household Income

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Household Income				
< \$20,000	19%	9%	8%	9%
\$20,000 to \$39,999	17%	16%	16%	17%
\$40,000 to \$59,999	15%	16%	16%	16%
\$60,000 to \$79,999	11%	13%	13%	13%
\$80,000 to \$99,999	8%	11%	11%	11%
\$100,000 to \$149,999	13%	19%	19%	18%
\$150,000 to \$200,000	7%	9%	9%	8%
\$200,000 +	8%	8%	8%	6%
Average Household Income	\$85,401	\$95,180	\$93,947	\$88,151
Real Annualized Growth in Household Income	0.2%	0.9%	0.9%	1.0%

Source: Statistics Canada 2016

Findings

- Within the Immediate Trade Area, there is a polarized combination of lower income students and higher income professionals. 26% of households earn less than \$40,000 and an equal proportion (28%) earn more than \$100,000 annually.
- In addition, the real growth in household income is less than elsewhere. This suggests that the Immediate Trade Area is continuing to evolve and shift away from high income professionals and cater to the growing student population.



3.1 Household Expenditure

Household Expenditure

	Immediate Trade Area – Westdale	Primary Trade Area	Secondary Trade Area	City of Hamilton
Local Serving Retail				
Food Purchased from Stores	\$12,604	\$12,955	\$12,920	\$8,231
Alcohol Purchased from Stores	\$1,742	\$1,533	\$1,531	\$1,447
Health Care Related Retail	\$2,775	\$2,864	\$2,828	\$2,737
Food Services				
Restaurant dinners	\$2,712	\$2,321	\$2,304	\$2,190
Restaurant lunches	\$1,292	\$1,143	\$1,131	\$1,080
Restaurant breakfasts	\$365	\$393	\$387	\$374
Restaurant snacks and beverages	\$679	\$624	\$619	\$600
Alcohol Serviced on Premises	\$1,001	\$629	\$617	\$583
Retail Merchandise				
Women's Clothing and Accessories	\$2,064	\$2,035	\$1,987	\$1,898
Men's Clothing and Accessories	\$1,256	\$1,166	\$1,138	\$1,109
Children's Clothing and Accessories	\$68	\$60	\$58	\$61
Clothing as Gifts	\$554	\$613	\$607	\$586
Home Furnishings	\$1,758	\$1,288	\$1,264	\$1,184
Appliances and Electronics	\$721	\$550	\$538	\$545
Leisure Retail (Sporting Good, Books, Music)	\$946	\$690	\$681	\$667
Pet Supplies	\$393	\$401	\$411	\$391
Florist, Nursery, Greenhouse Stock	\$252	\$271	\$278	\$258
Home Improvement Retail	\$168	\$198	\$210	\$195
Services				
Packaged Travel	\$424	\$391	\$383	\$368
Clothing - Laundromat, Dry Cleaning, Tailor	\$182	\$152	\$145	\$24
Recreation Memberships	\$467	\$307	\$295	\$289
Movies	\$95	\$59	\$57	\$60



Live Sporting Events	\$115	\$24	\$23	\$23
Live Performing Arts	\$185	\$90	\$91	\$89
Personal Care Services	\$708	\$761		\$705

Source: Statistics Canada, Environics Estimates 2017



Findings

Households in the Immediate Trade Area surrounding Westdale spend a higher proportion of their budget on (16 top ranked goods and services):

- Clothing services – laundromat, dry cleaner, tailor
- Live sporting events
- Live performing arts events
- Alcohol served on premises
- Recreation memberships, gym, fitness
- Movies
- Food from stores
- Home furnishings
- Leisure retail (sporting goods, books, music)
- Appliances and electronics
- Dinner
- Alcohol purchased from stores
- Lunch
- Packaged travel
- Snacks and beverages
- Men's clothing and accessories

Implications for Westdale Village BIA

- Both students and high-income professionals spend a high proportion of their budget on eating out, drinking, attending sporting events, attending performing arts events, leisure retail including sporting goods, electronic games and entertainment centres, and going to gyms, fitness centres, martial arts, yoga, dance classes, etc.
- Travel is very important as well as activities such as photography.
- In addition, the higher income professionals spend on their home including home furnishings, home entertainment, food and alcohol from stores in order to enjoy the comforts of home as well as to entertain their friends and family.



3.2 Other Major Target Markets and Customer Visitation

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

- McMaster University
- Columbia College
- Westdale Theatre (redevelopment)
- Hamilton Children's Hospital

McMaster University

Undergraduates	26,780
Graduates	4,485
Total Number Students	31,266
Full Time Students	29,336
Faculty FTE	949
Staff	11,000

Columbia International College – Grade 7 to 12 and University Preparatory

Students	1,800
----------	-------

McMaster Children's Hospital

165 beds
7,949 inpatients
3,223 outpatients
47,590 emergency room visits



Westdale Village BIA Employment

Employment Sector	2013	2014	2015	2016
Shopping, Services, Repairs, Servicing and Rentals	339	367	379	390
Office	92	167	125	125
Institutional	24	24	27	25
Entertainment and Recreation	8	15	17	20
Residential	0	0	0	0
Manufacturing, Resource	0	0	0	0
Terminal, Storage, Transport, Communications	0	0	0	0
No Perceived Activity (vacant)	0	0	0	
Total	463	573	548	560

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

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

Implications for Westdale Village BIA

- Retail employment has been growing from 2013 to 2016 as is office employment.

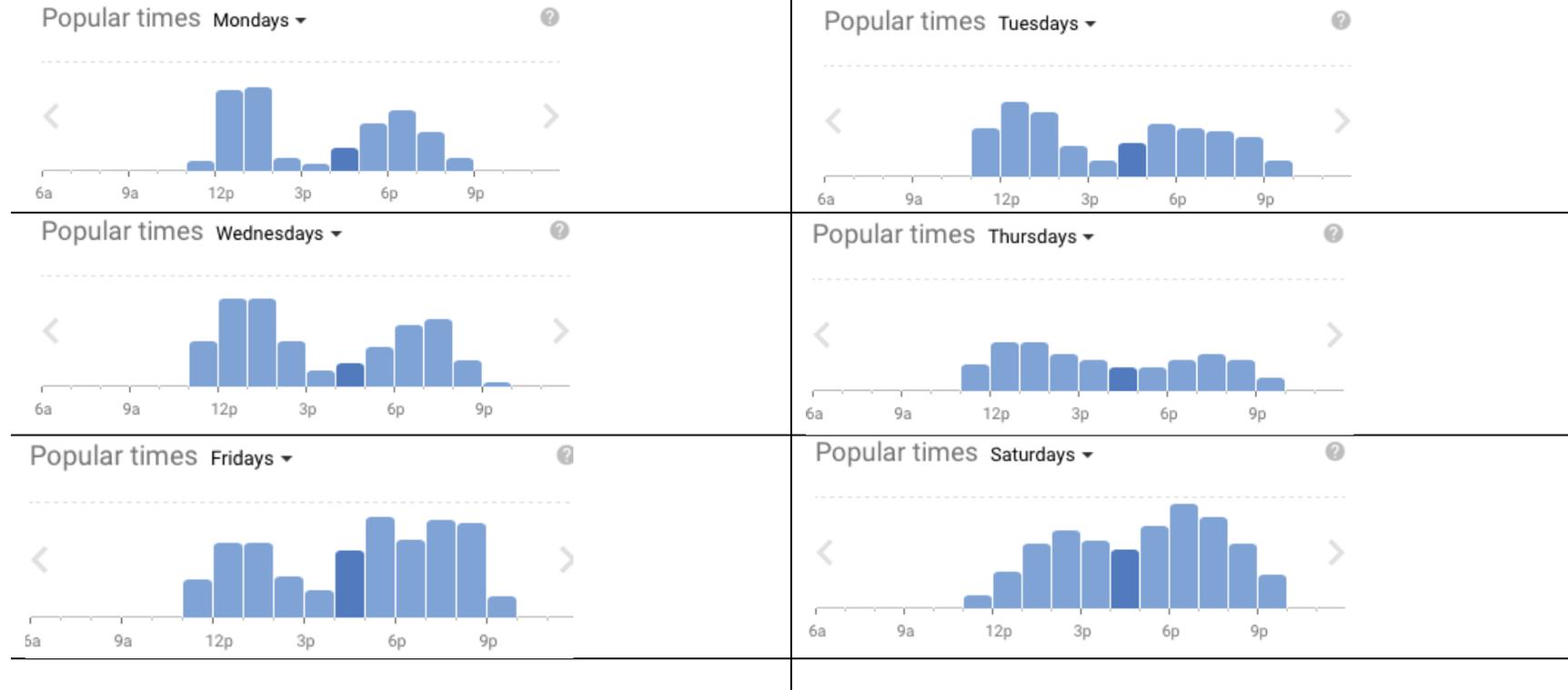


3.3 Customer Visitation Data

Customer Flow Times

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

Delirious Burger: 4.8 Google Rating





Second Cup: 4.3 Google Rating

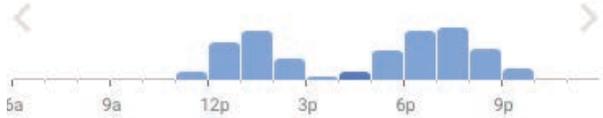
Popular times Mondays ▾



Popular times Tuesdays ▾



Popular times Wednesdays ▾



Popular times Thursdays ▾



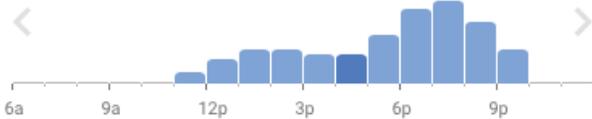
Popular times Fridays ▾



Popular times Saturdays ▾



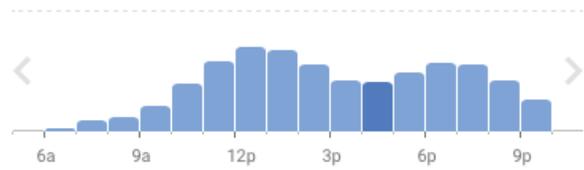
Popular times Sundays ▾



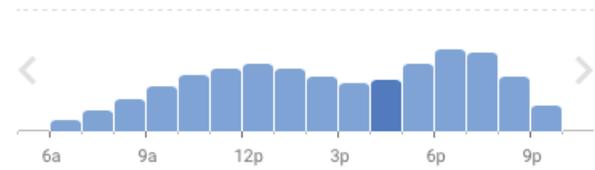


Saigon: 4.2 Google Rating

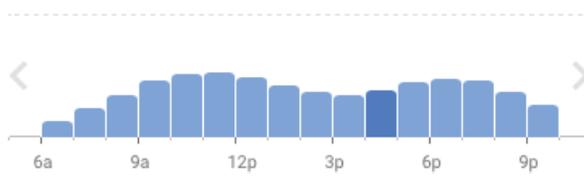
Popular times Mondays ?



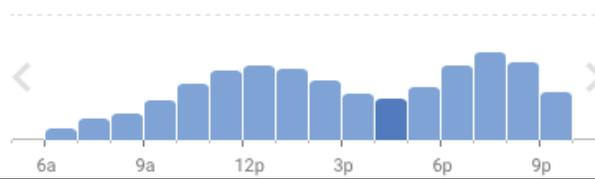
Popular times Tuesdays ?



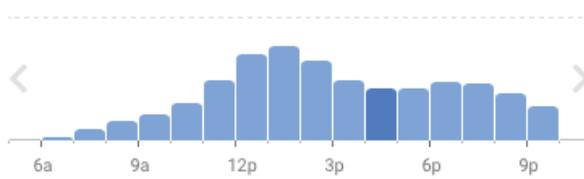
Popular times Wednesdays ?



Popular times Thursdays ?



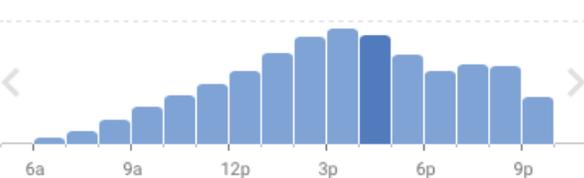
Popular times Fridays ?



Popular times Saturdays ?



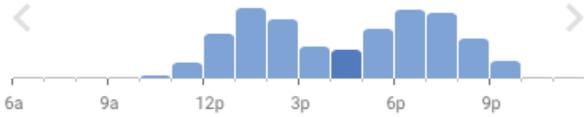
Popular times Sundays ?



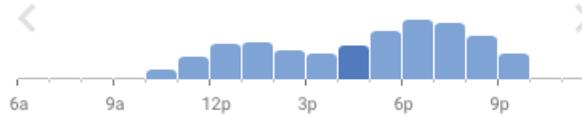


Basilique: 4.0 Google Rating

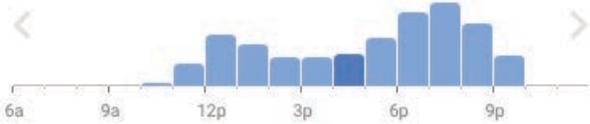
Popular times Mondays ▾



Popular times Tuesdays ▾



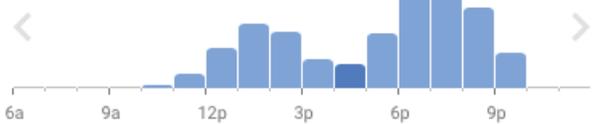
Popular times Wednesdays ▾



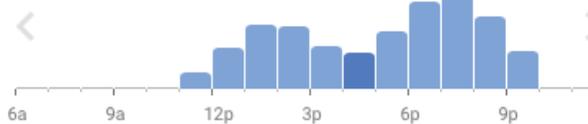
Popular times Thursdays ▾



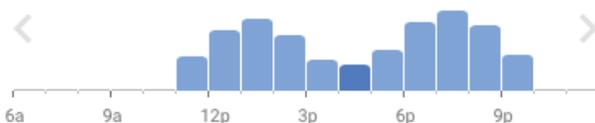
Popular times Fridays ▾



Popular times Saturdays ▾



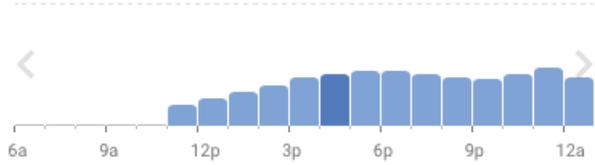
Popular times Sundays ▾



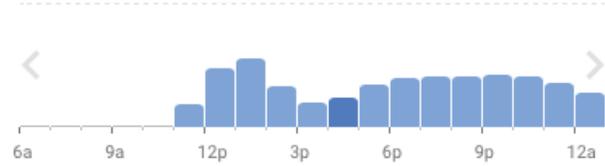


Pita Pit: 4.5 Google Rating

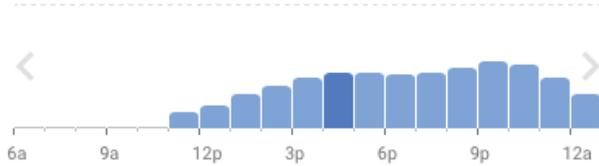
Popular times Mondays ?



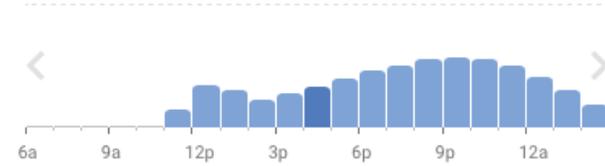
Popular times Tuesdays ?



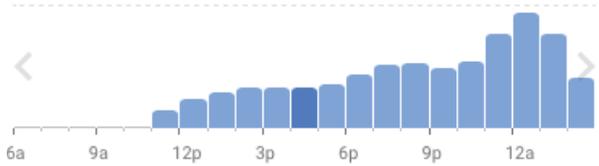
Popular times Wednesdays ?



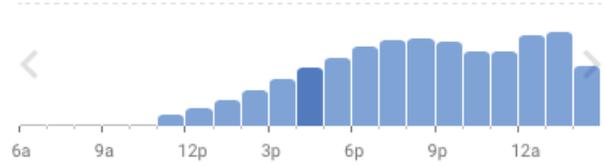
Popular times Thursdays ?



Popular times Fridays ?



Popular times Saturdays ?



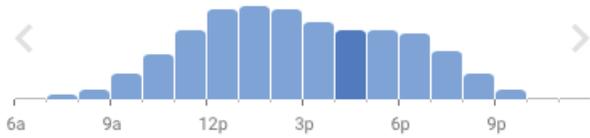
Popular times Sundays ?



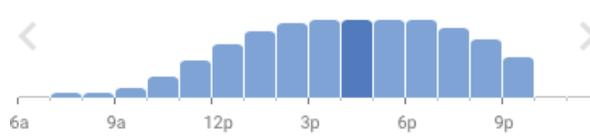


Paisley Coffee: 3.8 Google Rating

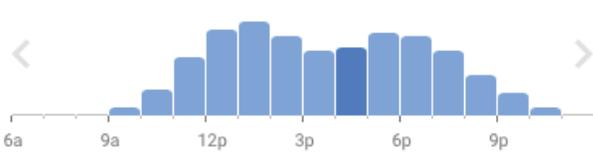
Popular times Mondays ▾



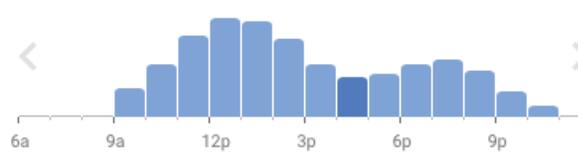
Popular times Tuesdays ▾



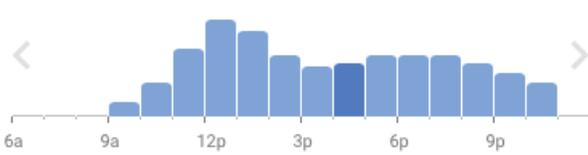
Popular times Wednesdays ▾



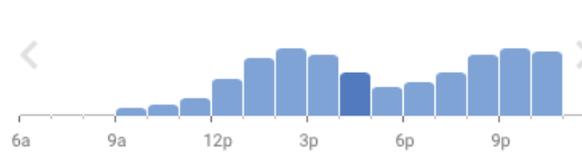
Popular times Thursdays ▾



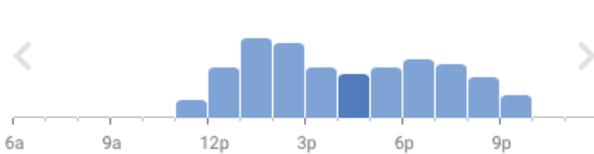
Popular times Fridays ▾



Popular times Saturdays ▾



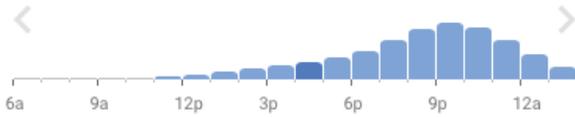
Popular times Sundays ▾



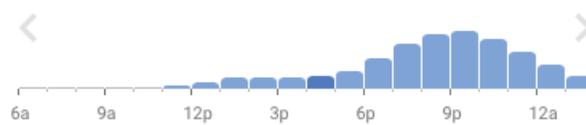


Snoopy Fox: 3.7 Google Rating

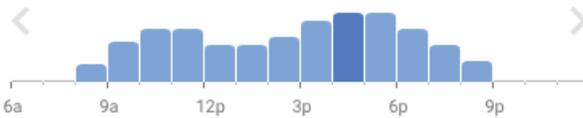
Popular times Mondays ▾



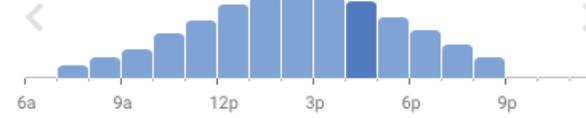
Popular times Tuesdays ▾



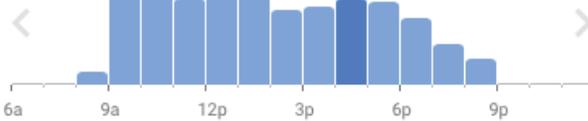
Popular times Wednesdays ▾



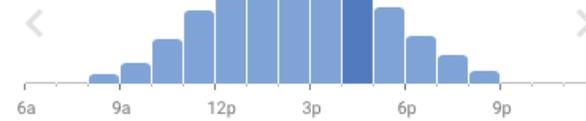
Popular times Thursdays ▾



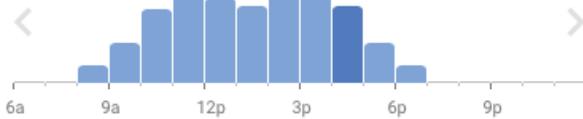
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾





Pizza Nova: 4.1 Google Rating

Popular times Mondays ▾



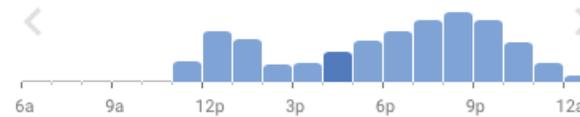
Popular times Tuesdays ▾



Popular times Wednesdays ▾



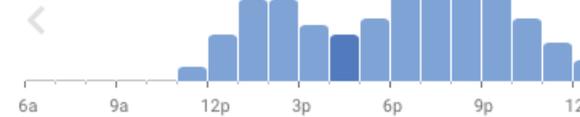
Popular times Thursdays ▾



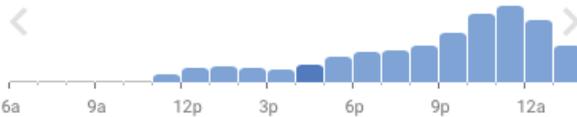
Popular times Fridays ▾



Popular times Saturdays ▾



Popular times Sundays ▾





Findings

- There is a wide range of eating establishments in Westdale Village BIA. The majority of them cater to university students. They tend to be busier Thursday to Sunday and toward late afternoon and into the evening.
- Many businesses rely on both lunch and dinner traffic to create their business plan.
- Few eating establishments cater or rely on breakfast traffic.
- There are some mid to late night eating establishments including the Snooty Fox, Saigon, and Basilique.
- It is also noted that the customers are more critical of some eating establishments in their reviews.



4.0 Quality of Life Statistics –Housing Prices

4.1 Housing Prices

As of October 2017, housing prices in Hamilton West increased 14.1% from 2016 to 2017. Average house prices increased from \$293,065 to \$473,860. From 2012 to YTD October 2017, average prices increased at an annualized rate of 10.1%. The growth rate has been increasing in the past two years at a higher rate than the previous three years. This illustrates the sought-after benefits of living in the Westdale area and the importance of having a well-functioning, attractive, and people gathering focused main street for nearby students, residents, and workers and quality of life attributes where they can live, work, play, and learn.

Hamilton West Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$293,065	
2013	\$319,602	9.1%
2014	\$345,044	8.0%
2015	\$369,963	7.2%
2016	\$415,313	12.3%
YTD Oct 2017	\$473,860	14.1%

Source: Realtors' Association of Hamilton and Burlington



5.0 Commercial Audit and Rent Review

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

Westdale Village BIA Commercial Business Audit – 2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	4	4.9%	4,800	4.2%
Furniture and Home Furnishings	1	1.2%	1,200	1.1%
Art Galleries	1	1.2%	500	0.4%
Electronics and Appliance Stores	2	2.4%	1,800	1.6%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	2	2.4%	3,000	2.6%
Other Retail	3	3.7%	3,200	2.8%
Total Retail	13	15.9%	14,500	12.8%
Food/Drug Retail				
Food and Beverage Stores	10	12.2%	10,800	9.5%
Health and Personal Care Stores	2	2.4%	8,000	7.1%
Total Food/Drug Retail	12	14.6%	18,800	16.6%
Food Services	21	25.6%	27,600	24.4%
Services				
Personal Services	6	7.3%	4,400	3.9%
Personal Services - Beauty	9	11.0%	6,900	6.1%
Financial Services	4	4.9%	9,000	7.9%
Medical Services	0	0.0%	0	0.0%
Professional Services	11	13.4%	10,000	8.8%
Recreation Services	2	2.4%	16,800	14.8%



Other Services	1	1.2%	2,000	1.8%
Total Services	33	40.2%	49,100	43.3%
Total Occupied	79	96.3%	110,000	97.1%
Vacant	3	3.7%	3,300	2.9%
Total	82	100.0%	113,300	100.0%

Source: 360 Collective



Westdale Village BIA Commercial Business Audit

2017

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	4	4.9%	4,800	4.2%
Furniture and Home Furnishings	1	1.2%	1,200	1.1%
Art Galleries	1	1.2%	500	0.4%
Electronics and Appliance Stores	2	2.4%	1,800	1.6%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	2	2.4%	3,000	2.6%
Other Retail	3	3.7%	3,200	2.8%
Total Retail	13	15.9%	14,500	12.8%
Food/Drug Retail				
Food and Beverage Stores	10	12.2%	10,800	9.5%
Health and Personal Care Stores	2	2.4%	8,000	7.1%
Total Food/Drug Retail	12	14.6%	18,800	16.6%
Food Services	21	25.6%	27,600	24.4%
Services				
Personal Services	6	7.3%	4,400	3.9%
Personal Services - Beauty	9	11.0%	6,900	6.1%
Financial Services	4	4.9%	9,000	7.9%
Medical Services	0	0.0%	0	0.0%
Professional Services	11	13.4%	10,000	8.8%
Recreation Services	2	2.4%	16,800	14.8%
Other Services	1	1.2%	2,000	1.8%
Total Services	33	40.2%	49,100	43.3%
Total Occupied	79	96.3%	110,000	97.1%

2009

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
	9	11.0%	8,700	7.6%
	3	3.7%	4,500	4.0%
	2	2.4%	700	0.6%
	1	1.2%	1,000	0.9%
	0	0.0%	0	0.0%
	0	0.0%	0	0.0%
	4	4.9%	4,800	4.2%
	2	2.4%	3,200	2.8%
	21	25.6%	22,900	20.1%
	9	11.0%	11,400	10.0%
	2	2.4%	8,000	7.0%
	11	13.4%	19,400	17.0%
	16	19.5%	21,200	18.6%
	7	8.5%	5,400	4.7%
	8	9.8%	6,200	5.4%
	4	4.9%	9,000	7.9%
	1	1.2%	1,000	0.9%
	8	9.8%	8,700	7.6%
	2	2.4%	16,800	14.8%
	2	2.4%	2,000	1.8%
	32	39.0%	49,100	43.1%
	80	97.6%	112,600	98.9%



Vacant	3	3.7%	3,300	2.9%	2	2.4%	1,200	1.1%
Total	82	100.0%	113,300	100.0%	82	100.0%	113,800	100.0%

Source: 360 Collective

Findings

There is approximately 113,000 sq. ft. of commercial businesses in Westdale Village BIA which is a small sized commercial main street.

- There are 84 different businesses. The average size of each business is 1,382 sq. ft. Most businesses are small. Excluding the Westdale Theatre, the average size is 1,205 sq. ft.
- Services is the largest category. Services account for 43% of the total square footage. This includes both professional services, recreational including the Westdale Theatre, and personal services including beauty services.
- Food services is the next largest category. One-quarter of the total square footage is devoted to cafes, coffee shops, fast food, and quick casual dining.
- Local food and beverage retailers including convenience stores and specialty food retailers account for 17% of the total square footage. There is a range that includes bakeries, sweets, health food, health supplements etc.
- Retail merchandise accounts for 13% of the total square footage. These include women's clothing and jewellery and accessories stores.
- Vacancy is a low 3% of the total square footage.

Changes since 2009/2010

- Since 2009, the major changes have been a flip for retail merchandise and apparel retailers for food services.
- The other categories have remained virtually unchanged.

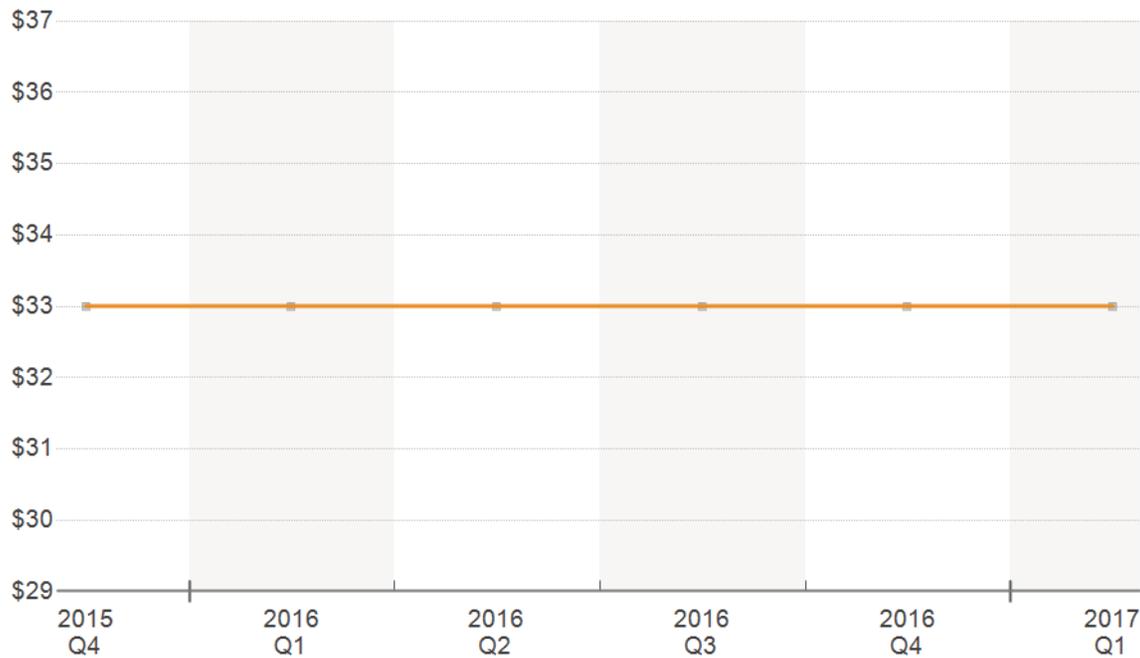


5.1 Rent and Land Value Analysis

Net Rent Analysis

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

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



Source: CoStar

Findings Net Rents Westdale Village

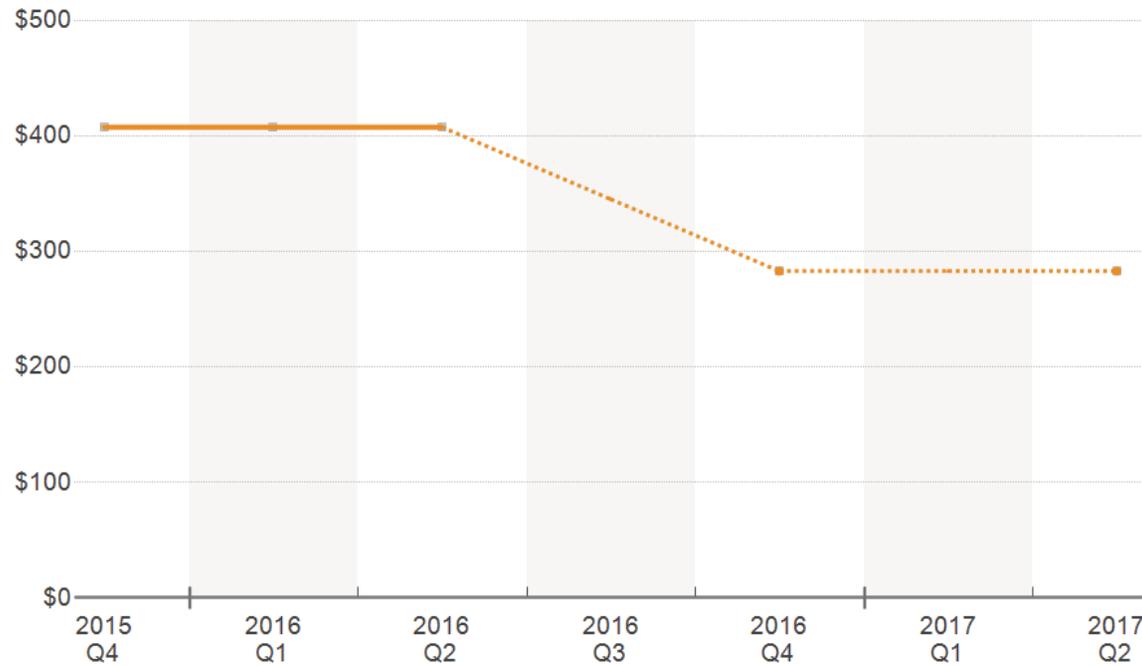
- Rents are high in Westdale Village BIA
- They are relatively stable at \$33/sq. ft.
- There is anecdotal evidence that rents have been increasing and retailers have left or are considering cancelling their leases.



Average Asking Price/Sq. Ft.

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

Average Asking Price/Sq. Ft.



Source: CoStar

Findings Average Asking Price Westdale Village

- The sale price for buildings in Westdale Village BIA is relatively high.
- There may be some softening in the prices of buildings that include retail within them.



6.0 Westdale Village BIA Website Review

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

The five areas assessed were:

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

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

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

Nature of Findings

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



Westdale Village BIA Website 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 Westdale Village BIA Website

Area Reviewed	Westdale Village ★★★
Functionality	Very Good
Content & Purpose	Good
Innovation and Interactivity	Good
Visual Design	Basic
Mobile Optimized	Basic Visible but not optimized
Accessibility Compliance	8/670



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

Content Provided in Westdale Village BIA Website

Content Provided	Westdale Village
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

Westdale Village BIA Website Findings

The Westdale Village website has basic information on its website. The social platforms are quite active especially Twitter, but it has a presence on Facebook and Instagram as well. While most of the event information is targeted to residents and visitors it does have some information related to business members. This includes the board meeting schedule, agenda, minutes and information on city grants.

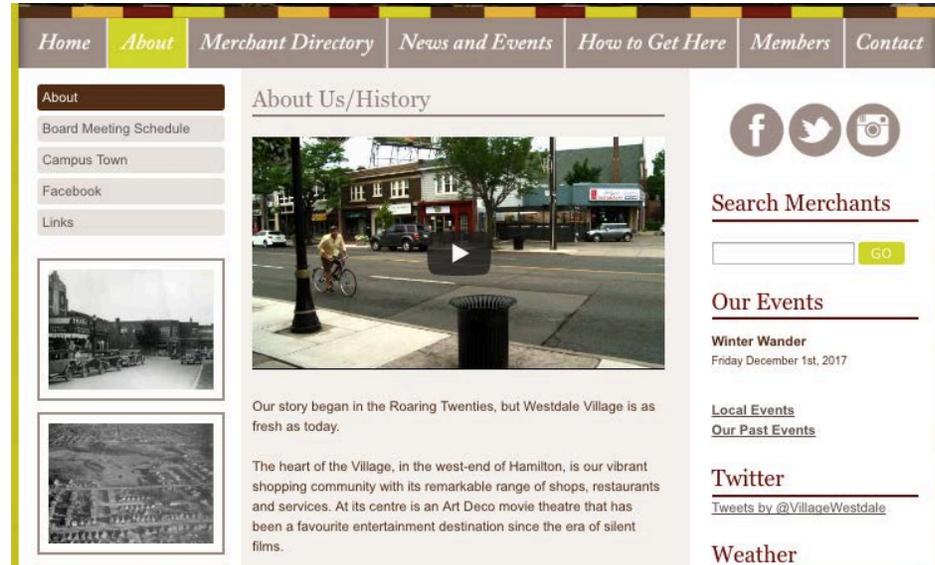
As the target of the website is mixed between visitors, residents and business members there should be a clearer delineation in the navigation so that each visitor to the website can quickly access the information they seek. Currently the board meeting schedule is found under the “About” link while past information such as minutes is found under the “Members” link.

In addition, while the site includes some good images they appear more generic. Images of events and store events (some of which are on the site) are a great way to relay a message of community and ‘activity’ within the area.

Furthermore, mobile optimization of the site will be key given that 86% of Canadian households have mobile devices (CRTC) and a vast majority use it to conduct research into information online. Most new format websites are automatically guaranteed to be mobile optimized.



Westdale Village BIA Home Page



About Us Page

Westdale Village BIA Website Summary

The Westdale Village BIA website has several areas for improvement including within the visual layout to bring it up-to-date, make it mobile optimized and improve the navigation and accessibility of information by each target group – visitors, residents, businesses, would be investors, etc.

Areas where other BIA websites excel are with: good visual presence online with some providing excellent marketing imagery (e.g. Live, Learn, Play) and content. Some of the sites have unique features which can help to differentiate the retail/shopping area/food/restaurants/things-to-do for visitors and would pique the interest of investors/other businesses for its unique nature (e.g. map of wall murals in the area). Others also are clearly targeting the business community with events and information to make it easier learn how to further improve their businesses.



7.0 Investment in Westdale Village BIA

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

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

Past and Current Development Applications

Address	Committee of Adjustment or Zoning Code	Reference Number	Details
1043 King St. W.	MDA	10	82 Construct 2 storey retail/office
981 King St. W.	MDA	12	147 Façade for SDM
11 Paisley	HM/A	12	26
1008 King St. W.	HM/A	13	91
981 King St. W.	ZAR	13	21 Amend zoning to allow dance/fitness
946 King St. W.		15	172 Allow 43.1 m2 patio
946 King St. W.	HM/A	15	36
1048 King St. W.	HM/A	15	60

Source: City of Hamilton Planning and Economic Development Department

Nearby at 925 Main St. W. is a proposed redevelopment for Columbia College that includes 1,500 m2 retail and 406 housing units.

Legend

SPA: Site Plan Approval

DA, MDA: Development Application (modified)

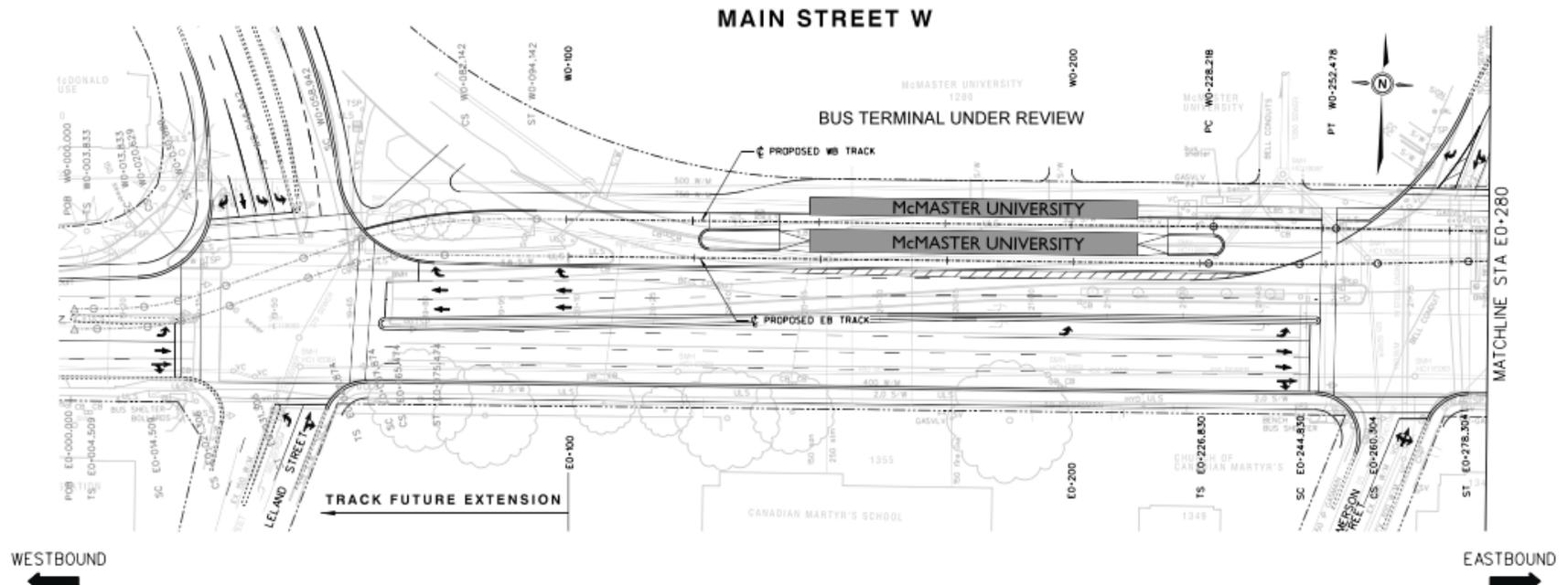
HM/A, HM/B: Committee of Adjustment

ZAR: Zoning ByLaw Amendment Application

Proposed LRT Stations Near Westdale

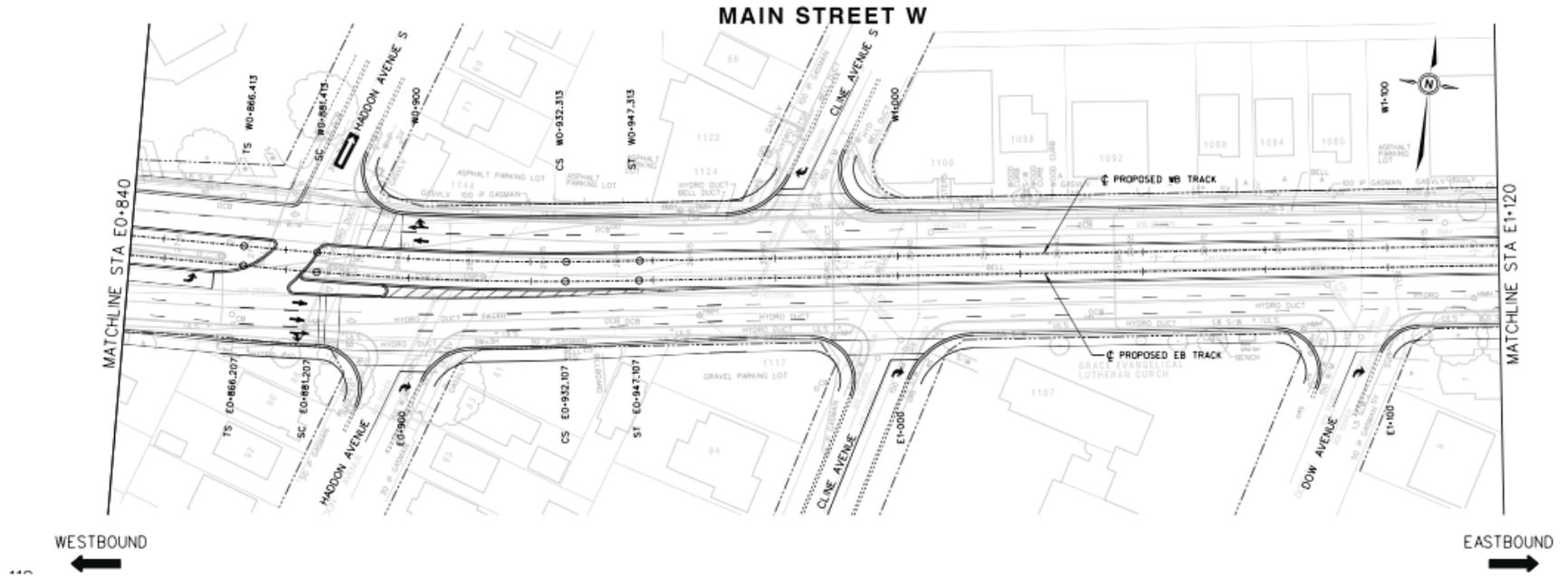
- The following illustrates proposed LRT stations near Westdale. Information provided in this section is current as of March 2018.
- The proposed LRT stations near Westdale will change the transportation through and near Westdale Village.
- The Bus Routes 1, 1A, 51, and 10 will be discontinued.
- Bus Route 5A and 5C will be maintained but modified near the Downtown.
- The following maps illustrate the proposed stations and potential intersections and turning movements affecting access and egress to Westdale Village BIA.

McMaster University LRT Station



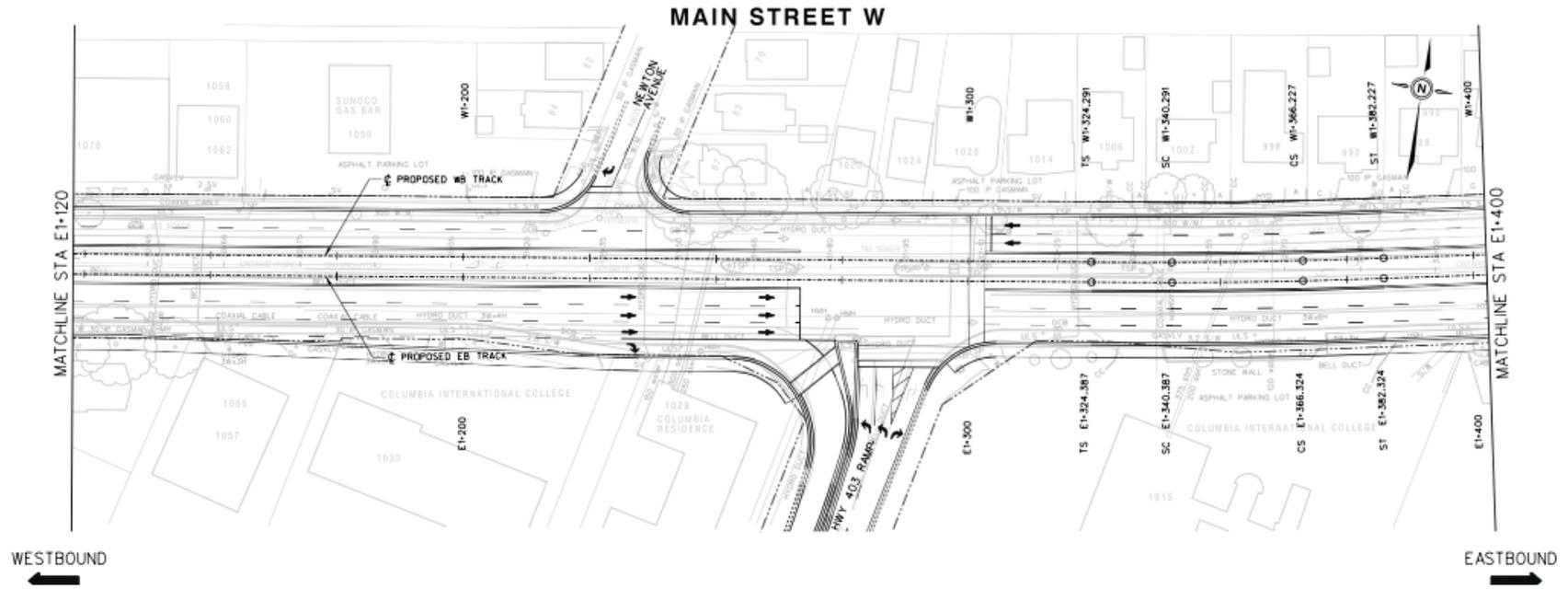


Main St. W. and Haddon/Cline Avenue Areas



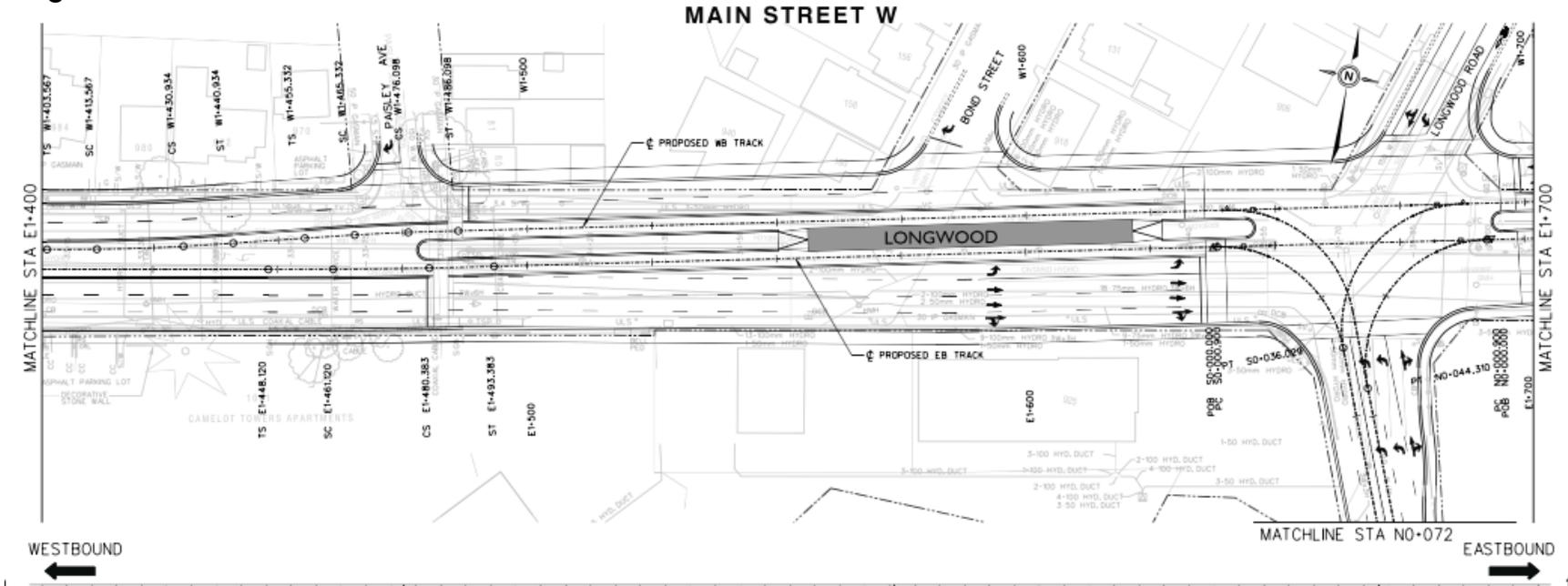


Main St. W. and Newton Ave.





Longwood LRT Station





Commercial Building Permits

Westdale Village BIA Value of Commercial Building Permits

Year	Commercial
2012	\$160,000
2013	\$827,168
2014	\$45,500
2015	\$213,000
2016	\$885,000
Total	\$2,130,668

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

Notes:

Construction Value provided similar to monthly permit reports

Findings

- Over \$2 million has been invested in commercial properties in Westdale Village in the period from 2012 to 2016.
- Work has begun on the Westdale theatre and will continue until opening day in 2018.

Grants and Incentives

Westdale Village BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG
2012	\$158,317.37
2013	\$123,073.84
2014	\$139,136.92
2015	\$10,848.49
2016	\$48,228.40
Total	\$479,605.02

Source: City of Hamilton

Findings

- The total cost of the investments associated with incentives has been significant in Westdale Village BIA.
- Approximately \$480,000 has been invested through the assistance of the City of Hamilton.



- The investment amounts were high in 2012 to 2014. However, in 2015 and 2016 the investment has declined.

Assessed Value

Westdale Village BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2012	\$18,307,844	
2013	\$18,813,758	2.8%
2014	\$19,348,292	2.8%
2015	\$20,360,303	5.2%
2016	\$20,615,927	1.3%
2017	\$23,459,495	13.8%

Source: MPAC, City of Hamilton

Findings

- From 2012 to 2017, the assessed value of the commercial areas within the Westdale Village BIA has increased by over \$5 million. This represents an annualized rate of 4.2%.
- 2017 experienced the highest growth rate change. Previous to 2017, the growth rate while positive was still reflective of a healthy rate of change. The increase may be due to data collection methods at MPAC that reviews properties on a four-year schedule.

Implications for Westdale Village BIA

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



Westdale Village BIA Budget

The Westdale Village budget has fallen. The levy has essentially been unchanged from 2012 to 2017. The parking revenue sharing amount has declined over time in line with both less money to share amongst all the BIAs and the declining on-street parking revenue in Westdale.

Westdale Village BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2012	\$960.58	\$14,215.03	\$28,253.62	\$43,429.23	\$122,500	\$165,929.23
2013	\$961.35	\$13,934.52	\$26,592.20	\$41,488.07	\$122,500	\$163,988.07
2014	\$1000.00	\$13,736.10	\$27,182.44	\$41,918.54	\$122,500	\$164,418.54
2015	\$1,316.60	\$14,456.24	\$20,645.55	\$36,418.39	\$121,000	\$157,418.39
2016	\$1,325.81	\$15,580.17	\$17,184.60	\$34,090.58	\$125,000	\$159,090.58
2017	\$1,300.00	\$13,583.39	\$17,968.88	\$32,852.27	\$125,000	\$157,852.27

Source: City of Hamilton



8.0 Key Person Interviews

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

STRENGTHS

ECONOMIC DEVELOPMENT

Due Diligence

- Conducted research on the area and there was a high correlation between product offering and the local demographic especially students

Customers

- Loyal Customers
- There are repeat customers who visit on a regular basis
- Customers tend to be 40+
- Older residents are retiring, but not moving out as fast as other places
- Local residents, regional residents, and McMaster faculty
- Tend to appreciate good quality
- Local families
- Loyal residents who want to see Westdale thrive and will shop locally to support their unique neighbourhood

Business Mix

- Good mix of stores each does their own thing, somewhat similar but different enough
- Some destination-oriented businesses

Nearby Employment and Students

- McMaster University
- Columbia College
- Faculty, staff
- Hospital staff and visitors
- McMaster Innovation Park



Lease Rates

- Westdale lease rates are more reasonable than Locke St. S. and James St. N.
- Able to test waters in Westdale with a short lease

Live and Work in Same Area

- Able to work and live in same area

Education and Experience

- Have created more opportunities for education and experiences within the store
- Creating a system for customers to come back, return visitation

Female Ownership

- A high proportion of businesses are owned by females in Westdale

PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

No LRT

- Happy not to have the hassle and issues associated with LRT running through Westdale

ORGANIZATION/GOVERNANCE

BIA

- Nice to see new energy with the BIA and new executive director

MARKETING

Events

- Winter Wonderland was a better run event than in the past
- Winter Wonderland was better than in the past



WEAKNESSES

ECONOMIC DEVELOPMENT

Traffic

- There is nothing to bring people into Westdale – just the local traffic
- Students tend to stay on campus with their peers and don't venture into Westdale that often
- Not a lot of browsing going on in Westdale, visitors are destination oriented and not cross shopping or browsing the street
- Not enough walk in traffic to sustain the business model
- Westdale is isolated
- Unsure of the proper mix of destination versus local serving retail
- Potentially traffic issues during LRT construction

Polarized Demographic

- The students are very cost conscious and will not spend on luxury items and high-income households are fewer and fewer – difficult to determine who to market to
- Older local residents are not spending money as they did in the past
- Misunderstanding to think that Westdale is a well-off neighbourhood
- Westdale does not parallel the rest of Hamilton
- Older residents are not moving out as fast and aging in place
- No baby buggies in Westdale compared to Locke St. area
- While there are good amenities nearby in Westdale that would attract families to live here, there is always the town/gown concerns
- Westdale doesn't come off as hip enough for the students

Lease Rates

- If don't own the building then subject to rental rate increases
- Landlord tried to raise rent 30% but was able to negotiate 18% increase
- Rent issues – lower rents east end of BIA compared to west end

Supply Management Issues

- Difficult for small businesses to control the price of products they sell especially when they have to buy it all from other suppliers



PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

Parking Issues

- Parking enforcement is an issue, too aggressive

ORGANIZATION/GOVERNANCE

Organization

- Lack of organization and leadership when there was no Executive Director

City

- Should support local businesses more (note interviewee was not aware of the One City video that Economic Development had produced for small main street businesses)
- Tourism should have more links to BIAs (note interviewee was not aware of the Tourism Hamilton links in their shopping section)

MARKETING

Events

- Only restaurants benefit during events
- Winter Wonderland event was not well attended
- West Fest is not a major event anymore
- Street closures for events don't make sense and not all businesses benefit

Advertising

- Westdale is not top of mind, it is not in the news enough, becomes drowned out by the multitude of other main streets that are having success
- Students are always revolving so there is no equity in your marketing efforts, have to expend the same amount of money and resources each year to reach students (they are always graduating and moving out of the area)



OPPORTUNITIES

ECONOMIC DEVELOPMENT

Businesses

- More grocery, green grocer items
- Need quality fast casual restaurants to help customers stay longer and linger
- No more restaurants
- More holistic health practitioners
- Need a greater mix of businesses – cannot be a foodie area, can't compete with James St. N.

Customers

- See more growth opportunities serving local residents, sense that local residents really want to support local businesses in Westdale

Westdale Theatre

- Optimistic about the potential for the redeveloped theatre, the visitation it will bring

Isolated

- Have to turn the fact that Westdale is isolated into an advantage

PHYSICAL IMPROVEMENTS AND PROGRAMS FOR ENJOYABLE SHOPPING

Traffic

- Want Westdale to be a more active street and foot traffic area

ORGANIZATION/GOVERNANCE

BIA

- Westdale needs leadership and bring community together

MARKETING

Vision

- Westdale needs a re-imagining
- Feel that Westdale is in the midst of a revitalization and a shift to the positive



Marketing

- Reach beyond where Westdale customers are currently viewing notices to where new customers are, need more new customers (have to extend beyond existing network of marketing ideas)
- Have to work out marketing and sales promotion
- Have to be out in the media areas where the customers you want are
- Have to set up joint marketing activities with other places to co-brand your businesses
- Have had to go out and market business in non-traditional ways, looking for co-marketing approaches

Events

- More smaller events may be a good thing – willing to try

Hospitality

- Working on more hospitality-oriented marketing such as brochures at hotels, tourism office, etc.

THREATS

- Range of other main streets in Hamilton, Burlington area that have developed their own following
- Westdale is now the sad cousin to Locke St. and James St. N.
- Businesses tend to do their own thing and are not that involved in other businesses or with the BIA
- No one knows that Westdale is here



9.0 Strengths Weakness, Opportunities, and Threats

9.1 Workshop #1 Feedback

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

Business Development

- Increased Sunday hours
- Increased weekend-oriented businesses and family-oriented businesses
- Focus on families that live in the area to encourage increased visitation and a business mix reflective of what those residents want
- E.g., Library will now be open on Fridays but not yet on Sundays
- Can develop carrot and stick programs for businesses that are open on Sunday – celebrate those open on Sunday (e.g., special page on the Website, check list of businesses open Sundays)
- Destination stores – highly specialized
- Focus on regional visitors who drive further and spend more (e.g., current operations for the kitchen supply store)
- Destination and local – kitchen store (gifts for regional and cooking classes for locals)
- Go after businesses wanting a second location (e.g., Locke St. businesses)
- Pop ups may be effective but not determined yet
- Rent rebate programs or incentives to lower City property taxes

Marketing

- Marketing budget will have to change with Westdale Theatre opening
- Westdale countdown to opening in July 2018 – increase public relations program

Events

- More events year round on Thursday and Friday – focused on the dinner hour
- Build off of the busy time of the year and then incrementally keep adding more
- Increase the activity into Westdale's shoulder seasons (less busy times such as Summer)
- Work with house hunting tours that come into Westdale and showcase the village to them



Website Suggested Improvements

- More pictures of people in Westdale
- More colour
- Link to trail association – trails and lattes
- Work around the idea of Westdale as the little village in paradise or village in the City
- Westdale - unique and only one of them
- Should be able to attract those interested in landscape, parks, university, hospital
- Website is too old fashioned – needs to pop
- Be tourist friendly – focus on those who don't know the area and if you were coming from further away – all the facts that you would want to know about the shopping area
- Focus of website is on visitors
- Can provide some hot links to brokers and they are responsible for the heavy lifting related to leasing space and being up to date on properties for lease/sale



9.2 SWOT

Strengths

- Distinctive identity based on geographic location, building types and facades, street layout
- Set in an affluent neighbourhood of higher income, well educated, and sophisticated residents
- Attracts regionally due its business mix and long history as a viable main street area
- High daytime population that includes students, local area workers, local residents and stay at home residents (e.g., retirees, home makers, etc.)
- Many businesses that have developed highly specialized focus that collectively creates a draw for Westdale Village BIA

Weaknesses

- Small business district and isolated from the Main Street
- Transient nature of the student population means that extra effort must be spent each and every year to convince students to visit Westdale Village BIA (no equity in the marketing capital outlays year after year)
- Polarized target markets of young students who often have limited budgets and an older and retired based on seniors
- Very low population growth

Opportunities

- Common food service eating establishments that cater to both students, workers, and local residents
- Blurring retail categories that allow a business to sell goods and services but also allows them to create more social gathering and community building type businesses

Threats

- Other main streets in the area that have created a strong identity and brand and are attracting students and others to shop, dine, and hang out
- LRT may change bus routes through Westdale Village and remove the accessibility feature of the Village to this target market



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

The following are noted changes in Westdale Village BIA in terms of suggested recommendations in 2009/2010 and the currently market assessment report in 2017/2018.

Changes in Recommendations from 2009/2010 to 2017/2018

2009/2010 Suggested Recommendations	2017/2018 Status Update
Renew committee work by each one setting strategic goals, tactics to accomplish the goals, and reporting structure to the main board meetings	The BIA has recently re-emerged with a renewed structure and Executive Director. New committee work will take time to begin. Often BIAs are now using a Task Force structure for their members rather than committees. Task Forces can be short lived and focused on timely, short-term outcomes. This can be more appealing for members to join in rather than a long-term commitment associated with a committee.
Work towards improved partnerships, especially with students and other McMaster organizations	Increasing partnerships is an ongoing initiative but one that Westdale Village BIA embraces
Increase communications with members	With the absence of an Executive Director at the BIA for several months, the communication protocols were not followed. With a new Executive Director, renewed communication programs are being put back in place.
Market the Westdale Village experience to both local and regional target markets that have similar common attributes	This is an ongoing debate within the BIA and business members on who and how much should be allocated for different target markets. The focus on creating business cluster videos will have cross market appeal for locals and regional visitors.
Make Westdale Village a venue for events and activities that are supported by the BIA but not necessarily run by the BIA	BIA has embraced an entertainment focus through programming multiple events throughout the year, but the bulk will be during the slower summer period with approximately one event per week. These events will be designed such that the street will not have to be closed.
Continue improvements on beautification-type programs	This is ongoing



Develop ways to increase use of façade improvement programs	The change in the incentive program requires a renewed marketing push to let businesses understand how they can use the incentives for the betterment of their business and the village.
Continue to work with HABIA and the City on programs that are beneficial to the BIA	HABIA's name is now Business Improvement Area Coordinating Committee. It is now a Committee of Council. Westdale Village BIA continues to work with the City and other BIAs on supportive programs.

11.0 Vision

The Westdale Village BIA vision remains the same as in 2009/2010. It will be a:

- Smart, schooled, cultured niche
- Intellectual meeting place with entertainment (note not late night)
- Strict design standards and business standards

To the vision is added a stronger emphasis on being an entertainment hub.



12.0 Westdale Village BIA Action Plan

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

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

Each action item includes the following elements:

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

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

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



12.1 Organization

STRATEGIC GOAL

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

RATIONALE

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

DESIRED RESULT

- 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 highlights key suggested recommendations for the Westdale Village BIA organization.

Organization Suggested Recommendations

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



policies – social media and procurement	they were last updated	procurement policies <ul style="list-style-type: none"> Review and update these and other policies on a regular basis 		
Partnerships	<ul style="list-style-type: none"> Number of valuable partnerships Review partnerships every six months to every year 	<ul style="list-style-type: none"> Create a list of current and potential partnerships, contact information, and assess each one of its value to the BIA Prioritize partnerships based on current and future impact to the BIA (McMaster, residents' associations, schools, police, Columbia College,, Westdale Theatre, etc.) 	BIA	Short to medium term
Review BIA boundaries	<ul style="list-style-type: none"> Boundaries of BIA compared to area businesses 	<ul style="list-style-type: none"> Every two years, review boundaries and determine if changes are merited 	BIA potentially in coordination with City Urban Renewal	Ongoing

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



		members including marketing techniques, Gen Z, grants and incentives, etc.		
--	--	--	--	--



12.2 Economic Development

STRATEGIC GOAL

- Create conditions for businesses to succeed in Westdale Village 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

- Long terms businesses, low turnover
- Low vacancy rates
- Clusters of strength that draw visitors to shop and visit

HOW TO ACCOMPLISH

Business Mix Types

- The business mix will be a combination of local serving businesses for students, workers, and local residents (e.g., lunch, cafes, errands) as well as destination type businesses including gift giving and specialty needs.
 - Blurring of categories to create places to socialize, interact such as barber shop that serves beverages, book store/café, game/cafes, escape rooms, clothing stores and a coffee shop, specialty food merchants that sell home meal replacement and prepared foods, gyms that sell activewear and have cafes (note many of these stores exist in Westdale Village BIA)
 - Green grocer 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, activewear
 - Interior design and home furnishings
 - Quick casual restaurants that serve lunch and dinner
 - Fitness/Entertainment – yoga, dance, recreation, virtual reality and escape/game rooms (including active wear clothing)
 - Gift type stores



Economic Development Suggested Recommendations

Specific	Measurable	Actionable	Responsibility	Time Frame
Business mix targets	<ul style="list-style-type: none"> Food service goals were to be within 15% to 20%. In 2017 it was 24% Retail merchandise goals were to be 23% to 30%. In 2017 it was 13% 	<ul style="list-style-type: none"> A focus on quality eating establishments is key If the goal is to pursue a greater entertainment type vision, then higher proportion of food is acceptable but it should not come at the peril of less retail merchandise. Food services does require retail merchandise to function well and provide a balance. 	Private landowners are primarily responsible for leasing but the BIA can help direct and massage the mix through indirect methods	Ongoing
BIA to take an indirect approach to business recruitment	BIA target business mix	<ul style="list-style-type: none"> Publish wish list of businesses desired in Westdale Village Communicate and share list with local brokers and landowners 	BIA in coordination with brokers	Medium Term



		<ul style="list-style-type: none"> • Provide BIA website linkages to other brokerage sites and vacancy listings 		
Support select residential intensification and infill	<ul style="list-style-type: none"> • Population growth greater than 0.5% annually 	<ul style="list-style-type: none"> • Selectively support increased residential intensification in the greater Westdale and Ainslie Woods areas • BIA could support demand through financing residential and mixed-use impact studies • Review three story maximum height limits in the BIA 	BIA and property owners	Medium Term
Encourage continued use of grants and incentives and ensure buildings and public spaces are retail oriented	<ul style="list-style-type: none"> • Monitor grant and incentive usage 	<ul style="list-style-type: none"> • Continue to monitor usage of grants and incentives • Have City of Hamilton staff conduct education programs on new incentives and 	BIA and Urban Renewal	Ongoing



		<p>how to apply for them</p> <ul style="list-style-type: none">• Encourage retail friendly business design		
Pop Up shop	<ul style="list-style-type: none">• Feedback on shop	<ul style="list-style-type: none">• BIA may consider one or two sites in the BIA for a potential pop up shop or outside vendor (may be a physical store front, a parking spot converted to pop up shop through the patio program, or a mobile vendor, etc.)• Vendor would rotate on a continual basis• Issues such as rent, insurance, and licensing need to be addressed in this type of program	BIA and property owner and Urban Renewal could develop a program that uses the City of Hamilton's Temporary Business License Program	Medium to Long Term



12.3 Physical Improvements and Programs for Enjoyable Shopping

STRATEGIC GOAL

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

RATIONALE

- Placemaking elements such as beautification must extend beyond planting flowers and banners. The use of placemaking elements needs to have a community building and social gathering element to it that supports business 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 Westdale Village.

DESIRED IMPACT

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

HOW TO ACCOMPLISH

Parking

- Develop a complete toolkit solutions based on affecting supply, management, and marketing. This includes reviewing the number of publicly available spaces.
- Placement of maps and directional signage in key locations along the street
- Encourage retailer owners and staff to park at the back of stores or in further away areas so that customers can use the parking
- Marketing programs when new parking technology is available such as mobile pay programs



Hours of Operation

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

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

- A streetscape programs should address creating more mini urban plazas throughout Westdale for people gathering, events, and retail and commercial businesses.
- The urban plazas should link to natural features, recreational trails, Cootes Paradise as well as tying back in to the commercial environment.

Gateways

- Westdale Village BIA has new gateways. However, with the LRT changes and road re-alignments, the BIA needs to stay at the forefront to ensure direction signage on where Westdale Village is located remains in place.

Patios

- The patio program from the City of Hamilton is still evolving. The BIA should encourage increased usage and monitor the program for success and changes.

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 Westdale Village BIA, lighting should be used to highlight the restaurants and patios in soft, glowing light.

Physical Improvement Suggested Recommendations

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



		location of loading zones		
Review physical and digital wayfinding	<ul style="list-style-type: none"> • Increased visitation • Reduced wayfinding complaints 	<ul style="list-style-type: none"> • Review with City location of wayfinding signage and determine ways to increase signage to Westdale • Constantly update any digital wayfinding elements 	BIA and City	Review annually
Review lighting in terms of safety and creating an overall experience, especially as the night time economy increases	<ul style="list-style-type: none"> • Conduct a study 	<ul style="list-style-type: none"> • Work with City on lighting study to match goals and objectives of the BIA members in terms of safety, outdoor dining, shopping, and increasing night time economy 	BIA and City of Hamilton	One year
With parking technology changes ensure that Westdale visitors embrace the new changes and sign up for mobile parking	<ul style="list-style-type: none"> • Work with City 	<ul style="list-style-type: none"> • Work with City on any co-marketing programs on parking change awareness 	City and BIA	One to two years



12.4 Marketing

CONTEXT

- The Westdale brand is well established and the BIA is making use of the brand to gain increased attention.

STRATEGIES

- Review events and follow through with BIA plan to add more entertainment based events throughout the year including the slow summer season
- Through partnerships, leverage marketing dollars to amplify the voice of the BIA to key target markets such as students, health care, regional visitors, etc.

RATIONALE

- Westdale Village BIA has a strong recognizable brand but it needs partnerships to amplify it for select target markets
- Westdale Village is ideally suited for increased entertainment and through placemaking and event programming the BIA can ensure that it is lively throughout the year and specifically during the shoulder season when students are not in the area.

DESIRED IMPACT

- One consistent, focused brand story that will attract select target markets to visit as well as any investors or would be businesses

HOW IT GETS DONE

- BIA to continue to tweak the Westdale BIA brand to ensure it stays relevant but overall there are no major changes envisioned.
- Develop a coordinated year events and promotions calendar
- Review all partnerships with the aim of amplifying the voice of the BIA
- Coordinate marketing with other messages such as parking, mobile payment, keeping noise and nuisance issues down, etc.
- Consider using Free Wi-Fi as a loyalty program that enables the BIA to market directly to visitors using the program.



13.0 Planning Context

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

13.1 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 are encouraged to contact the City of Hamilton before proceeding with planning building alterations, new development, leasing or purchasing property, etc.

13.2 Official Plan and Zoning By-law Designations for the Westdale Village BIA

Hamilton's Official Plan designates the Westdale Village BIA a "Mixed Use - Medium Density Area. This designation permits a full range of retail, service commercial, entertainment and residential accommodation at a moderate scale. These areas are intended to serve the surrounding community and to evolve and intensify into 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.

The 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.



13.3 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 foot print 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).



13.4 Height, Built-form and Design

The Zoning By-law specifies a minimum height of 7.5 metres (2 storeys) and maximum height of 11 metres (3 storeys) in the Westdale Village BIA. 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 Westdale Village 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).

13.5 Parking Requirements

New development or change of use in the Westdale Village 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 Westdale Village BIA

	Current By-law	Amendment 17-240
Multi-residential with 1 – 14 Units	0.3 spaces per unit for units 50 m ² or less 1 space per unit for units larger than 50 m ² .	0.3 spaces per unit for units 50 m ² or less 0.7 spaces per unit for units larger than 50 m ² . A maximum of 1.25 spaces per unit is permitted.
Retail uses	1 space per 20 m ²	0 spaces for first 450 m ² 1 space per 17 m ² of space between 450 and 4000 m ² .
Personal Services	1 space per 16 m ²	0 spaces for first 450 m ² 1 space per 16 m ² above 450 m ²
Offices	1 space per 30 m ²	0 spaces for first 450 m ² 1 space per 30 m ² above 450 m ²
Restaurants	1 space per 8 m ² 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 m² 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).



13.6 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 on an annual basis 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.



14.0 Trends

Trends are based on three overarching themes:

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

RETAILER AND COMMERCIAL BUSINESS TRENDS

Omni-channel

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

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

In addition, those businesses that rely 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 omni channel 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 smart phone now. Sensors, beacons, and transmitting devices are used to even help streetscape and landscape planners for snow melting sidewalks, etc.

Big Data

Businesses such as Google, Facebook and others are collecting data on consumers and making predictive models for how they will behave. In fact, they are attempting to anticipate what potential consumers want event 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 ² – 2000 m ² and offer 6-12 food concepts side by side with traditional grocery or boutique retail. These facilities often are licensed and operate from morning to late evening. Even though the hall may offer a number of concepts, the most successful business model leans towards owner operated or a small number of entrepreneurs each operating multiple concepts 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 limits the opportunities of 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 store front 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 work force 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 work spaces. 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 cross over, 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 similar fashion to current alcohol licensing and zoning.



CONSUMERS CHANGES

Buy Low Buy High

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

Food Shopping Throughout the Week

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

Demographics Are Destiny

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

Mediocrity Won't Cut It

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

ORGANIZATION AND GOVERNANCE

Leadership is King

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



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

Capacity Building and Return on Investment of BIAs in Their Community

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

- **Engagement:** Downtown's or a main street organization's top priority is to achieve greater membership engagement. It is also one of the top successes they have achieved in the past five years. To achieve greater membership engagement success, organizations in urban renewal had to apply innovative engagement skills to encourage participation. This could take the form of a guaranteed return call policy, changing BIA reporting forms to match the City's forms, municipalities supplying BIAs with office space, online polling by BIA membership, and communicating success stories.
 - Overwhelmingly, key successes for BIAs are related to community building within the BIA organization. Developing innovative BIA programs needs to have the support on membership. This includes factors such as leadership, staffing, active board members, communication, and active volunteers.
 - Engagement successes is related to three factors: (1) relationship building, (2) capacity building, and (3) social capital investment. Using the saying "through many hands comes light work" the BIA is able to leverage good working relationships to the benefit of the members. This is key for smaller BIAs and BIAs located in smaller communities.
 - Other key successes are centred around key programming such as events, marketing, beautification, and fostering a business mix and new innovative business openings that support the BIA strategic plan. During the interviews BIAs discussed examples of these programs and pilot type projects in their communities that illustrated how they measured their success. It can be argued that events and marketing are related to demand side economic development and beautification and business mix are related to supply side economic development. An understanding of how events, recruitment, beautification can support economic development is a major breakthrough.
 - Finally, a key to success is having a Strategic Plan that is realistic, achievable within a four to five-year time frame, and designates responsibility.
- **BIA Relevance:** BIAs need to constantly challenge themselves to prove through measurement indicators that they are relevant, important, and necessary to telling the BIA success story. This story must be shared at all levels of government and their membership.
- **Uniqueness:** A BIA should be recognized as unique and should not be forced into 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 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 all of the overall activities and programs carried out by BIAs.
- **Partnerships and Communication Matters:** At present, many Downtowns and main streets with smaller membership sizes (under 200 members) and in smaller communities (under 50,000 people) are more reliant on creating partnerships and having to create better communications vehicles to different audience members to build support compared to larger BIAs. However, it is also true that BIAs that have developed a highly specialized business mix in traditional retail or in food services have also relied heavily on developing a broad range of partnerships through excellent communication on their successes. Partnerships between municipalities and BIA varies. However, as a general rule, the stronger the municipal partnership, the greater awareness of the BIAs role in the community, results in greater success.

Determining Issues That are Symptoms of Greater Problems

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



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

PHYSICAL DESIGN

Universal Principles of Good Physical Design

Before commercial will thrive, the area must work for day-time activities and night-time activities, including residential, employment, and other day time or night time 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.



Streetscape

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

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

Signage

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

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

Urban Plazas

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

- These areas can be used for events.
- Smaller plazas and parks may also appear busier and therefore feel safer than larger, emptier spaces, thus encouraging their use.
- Plazas should also be used to create pedestrian pull/push effects. Locating 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 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.