



Downtown Waterdown BIA
Commercial Market Assessment Update

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1.0 Introduction

360 Collective was retained by the City of Hamilton (City) to undertake an update of the Commercial Market Assessment for the Downtown Waterdown Business Improvement Area (BIA). The previous update was conducted in 2009. The study process included a thorough review of the demand and supply characteristics of the BIA and provided strategic direction for new action items.

The process included:

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

This above listed information was compiled in this background report that was then reviewed with BIA members at an open workshop. After the workshop a vision confirmation and action plan was produced to assist the BIA and City to move forward with their planning initiatives. The complete report is included here.

Downtown Waterdown BIA





2.0 Visitors to Downtown Waterdown BIA

To understand the commercial market opportunities in Downtown Waterdown a review of visitor movement data was undertaken. This included four major reviews:

- Vehicular movements through Downtown Waterdown including Dundas St. E. and Hamilton St. N.
- Pedestrian intersection volumes and movements including changes over time.
- Key person interviews.
- Observational data.

2.1 Vehicular and Pedestrian Movements in Downtown Waterdown BIA

Vehicular and Pedestrian Volume 8-Hour Counts at Key Intersections in Downtown Waterdown BIA

Intersection	Date	8-hour Vehicular Count	8-Hour Pedestrian Count
Dundas St. E. and Berry Hill	Thur. Jun. 12 2014	17,419	91
Dundas St. E. and Hamilton St.	Fri. Oct. 28 2016	17,199	252
Dundas St. E. and Main St.	Fri. Nov. 11 2016	12,943	259
Dundas St E. and Mill St.	Fri. Nov. 11 2016	15,538	145
Hamilton St and Parkside	Fri. Oct. 28 2016	15,223	160

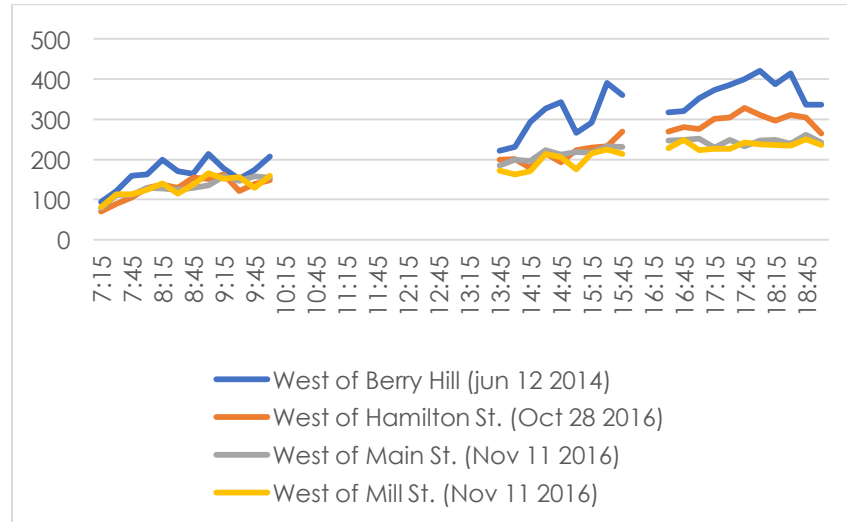
Source: City of Hamilton

Focusing on movement directly in Downtown Waterdown the following graphs illustrates vehicular traffic throughout the day at four major points along Dundas St. E. in the BIA including both westbound and eastbound traffic.

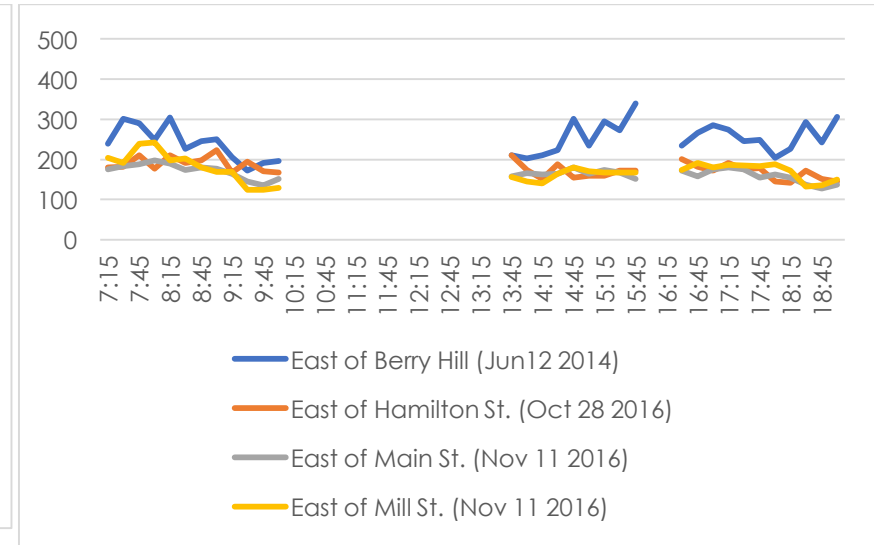


Westbound and Eastbound Vehicular Traffic Patterns Along Dundas St. E. in Downtown Waterdown BIA

Westbound Vehicular Traffic



Eastbound Vehicular Traffic



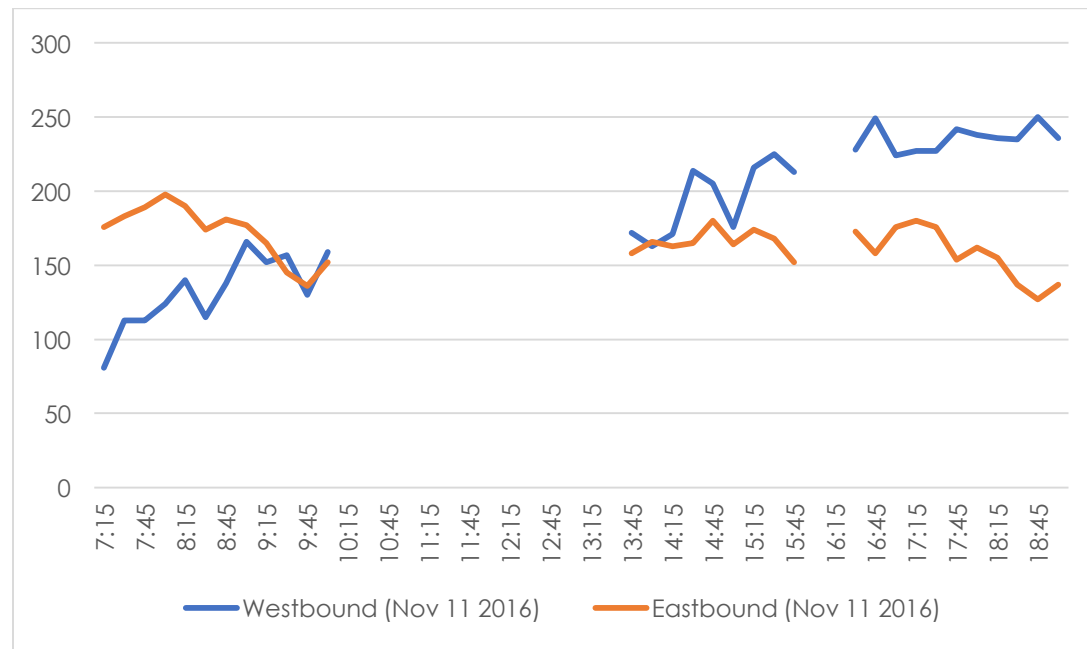
Source: City of Hamilton

Findings

- Westbound traffic has a slightly higher volume than eastbound traffic through the core of the Downtown.
- Westbound traffic builds in volume as it moves westward from Mill St. to Berry Hill Ave.
- In addition, westbound traffic builds throughout the entire day. Eastbound traffic remains relatively consistent throughout most of the day with the exception being Berry Hill area.
- There is a slight eastbound morning commute peak into Downtown Waterdown. The traffic is moving towards Burlington including Highway 407, QEW, and employment areas in the Burlington region.
- In the afternoon and early evening there is peak west bound traffic (reverse commute home) that is noticeable west of the Downtown area.
- In addition, the west bound home commute is combined with local residents doing errands in the Downtown giving a sustained traffic flow westbound throughout the early evening. While traffic west of Berry Hill Ave. falls in the early evening, traffic volume through the Main and Mill Street area remains sustained.



Vehicular Traffic Patterns Along Dundas St. E. between Main St. and Mill St. in Downtown Waterdown



Source: City of Hamilton

Findings for Downtown Waterdown

- Traffic flows at Dundas St. E. and Main/Mill St. spike eastbound during the morning commute and spike westbound during the afternoon/evening commute (including errands).
- The eastbound traffic starts very early in the morning (before 7 am) and is sustained for a longer period compared to other areas. There are two waves of commutes including Burlington and Other Greater Toronto Area (GTA). The Other GTA morning commute would begin earlier in the morning.
- Eastbound traffic is sustained throughout most of the day and begins to fall around 6:00 pm.
- Westbound traffic builds in the morning and then continues to build throughout the entire day. By 7:00 pm, there is no drop off in vehicular volume. The reverse home commute traffic includes both of the local area and the GTA creating



a longer reverse commute home peak period. In addition, the reverse home traffic begins to intermingle with local residents doing early evening errands, etc. related to their families.

Implications for Downtown Waterdown BIA

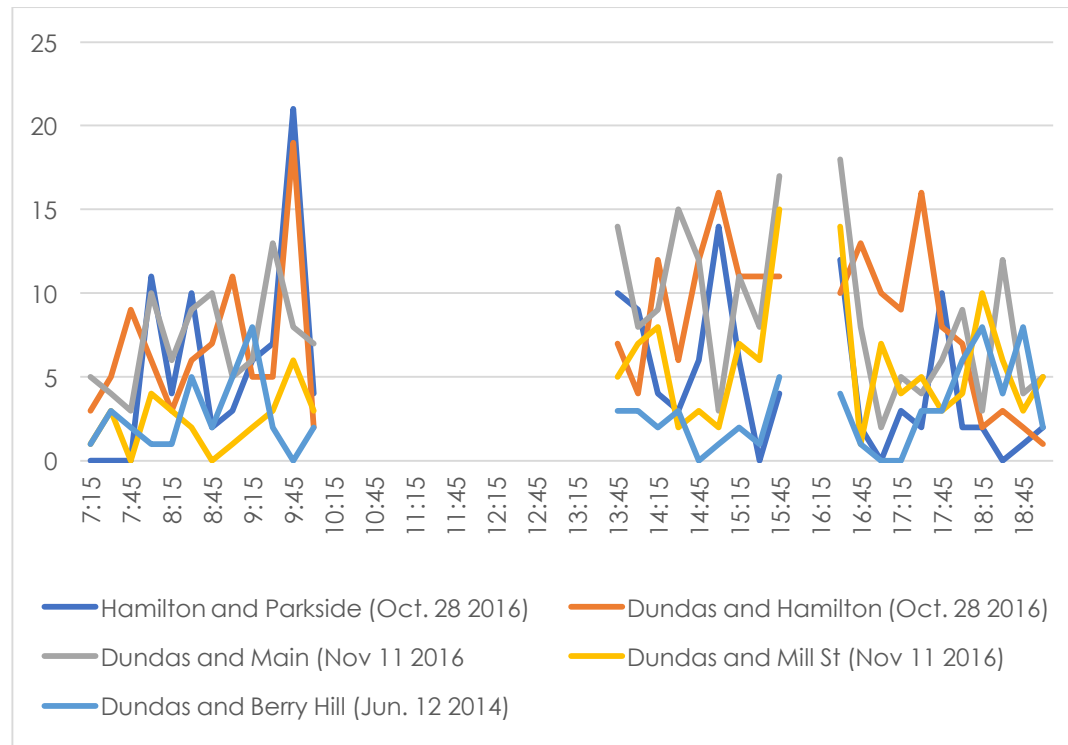
- Businesses in Downtown Waterdown are highly dependent on vehicular traffic.
- The commuter traffic includes longer waves of peak period as it includes both long-distance GTA/ southwest Ontario and shorter-distance Hamilton/Burlington commuters.
- In addition, in the early evening there is a combination of commuters and local errand traffic. The bypass road will relieve some of the truck and commuter traffic from the Downtown.
- The reverse home commute is key for businesses and having ample parking on the north side of Dundas St. E. is key to encourage visitors to stop. Vehicles during this high traffic period in the late afternoon and early evening are going to be reluctant to make left hand turns preferring a “right in, right out” parking opportunity.
- There may be some opportunities for early morning sales such as coffee/tea or later in the evening. Overall, business need to adjust their hours of operation for times when local residents are moving about the area to take advantage of potential business opportunities.



2.2 Pedestrian Traffic

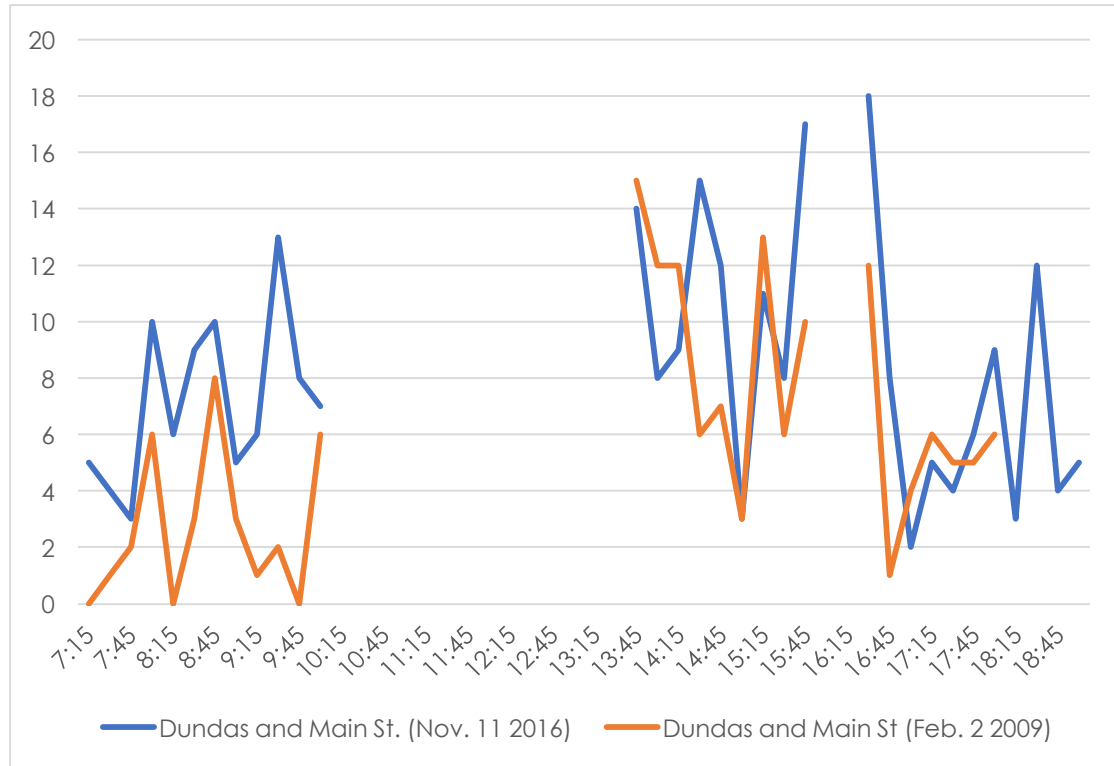
Average pedestrian traffic at the major intersections varies in Downtown Waterdown and it is relatively low.

Downtown Waterdown Pedestrian Traffic Counts – 15 Minute Intervals



Source: City of Hamilton

Downtown Waterdown BIA Pedestrian Traffic Counts at Dundas and Main St. – 15 Minute Intervals 2009 to 2016

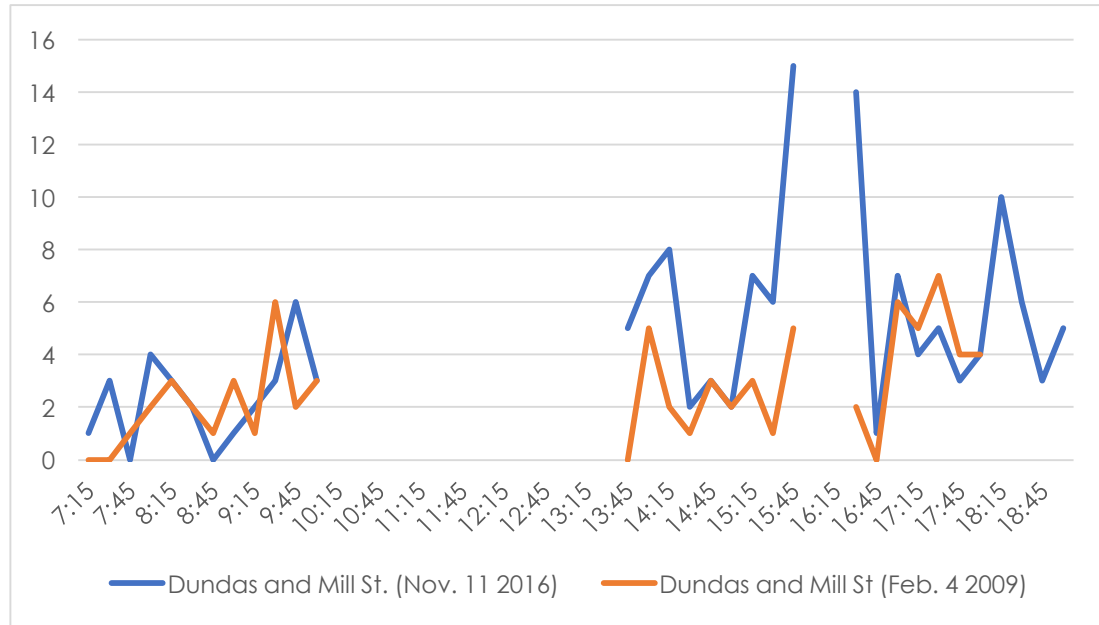


Source: City of Hamilton

Findings

- From 2009 to 2016, pedestrian traffic has increased.
- There is a spike in pedestrian traffic at 4:00 pm in the afternoon.
- There is more sustained pedestrian traffic in the early evening.

Downtown Waterdown Pedestrian Counts at Dundas and Mill St. – 15 Minute Intervals 2009 to 2016

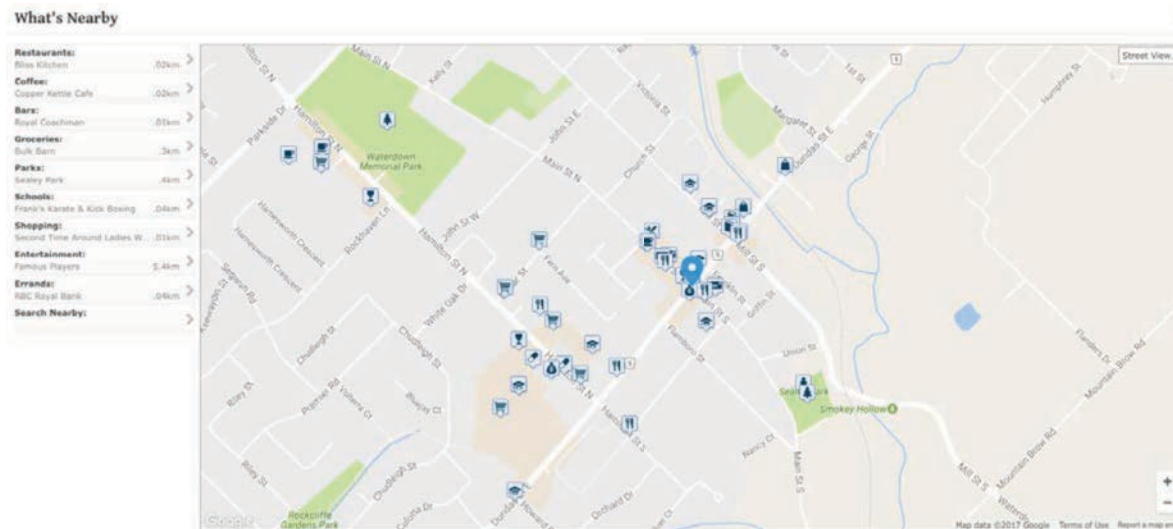


Source: City of Hamilton

Findings

- During the morning, pedestrian traffic at Dundas St. E. and Mill St. is very similar in 2016 compared to 2009.
- There is an increase in traffic in the afternoon in 2016 compared to 2009.
- The address 312 Dundas St. E. has a Walk Score of 80 and a Transit Score of 24. Within walking distance there is a good range of goods, services, and amenities nearby by foot. However, they are not very accessible via transit.

Downtown Waterdown BIA Walk Score – Nearby Amenities



Implications for Downtown Waterdown BIA

- New development at Dundas St. E. and Main St. has impacted pedestrian traffic in a positive way.
- Overall, pedestrian traffic is relatively low.
- Extending the pedestrian experience into the early evening is a priority.



3.0 Trade Area Analysis

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

3.1 Visitation to Flamborough and Leakage from Flamborough

The following table illustrates a typical 24-hour visitation to and from Flamborough. It should be noted that 2016 data is not currently available at the time of this report release. However, the BIA should source this information to supplement the report.

Visitors to Flamborough and Visitation from Flamborough – Origin Destination 24 Hour Period

	2011		2006	
	From Flamborough	To Flamborough	From Flamborough	To Flamborough
Flamborough	33,400	33,400	25,100	25,100
Burlington	10,600	10,800	9,500	9,800
Hamilton (fmr City)	9,700	9,300	8,900	8,700
Dundas	3,200	3,400	3,700	3,800
Mississauga	2,000	1,900	1,500	1,400
Oakville	2,000	1,900	1,500	1,500
Other Hamilton	2,800	2,700	2,600	2,500
Other Halton	1,000	1,200	1,100	1,100
Other Peel	200	300	600	600
Toronto	1,500	1,500	1,200	1,100
York	200	0	200	200
Other	300	400	200	100
Total	66,900	66,800	56,100	55,900

Source: Data Management Group, University of Toronto



Findings

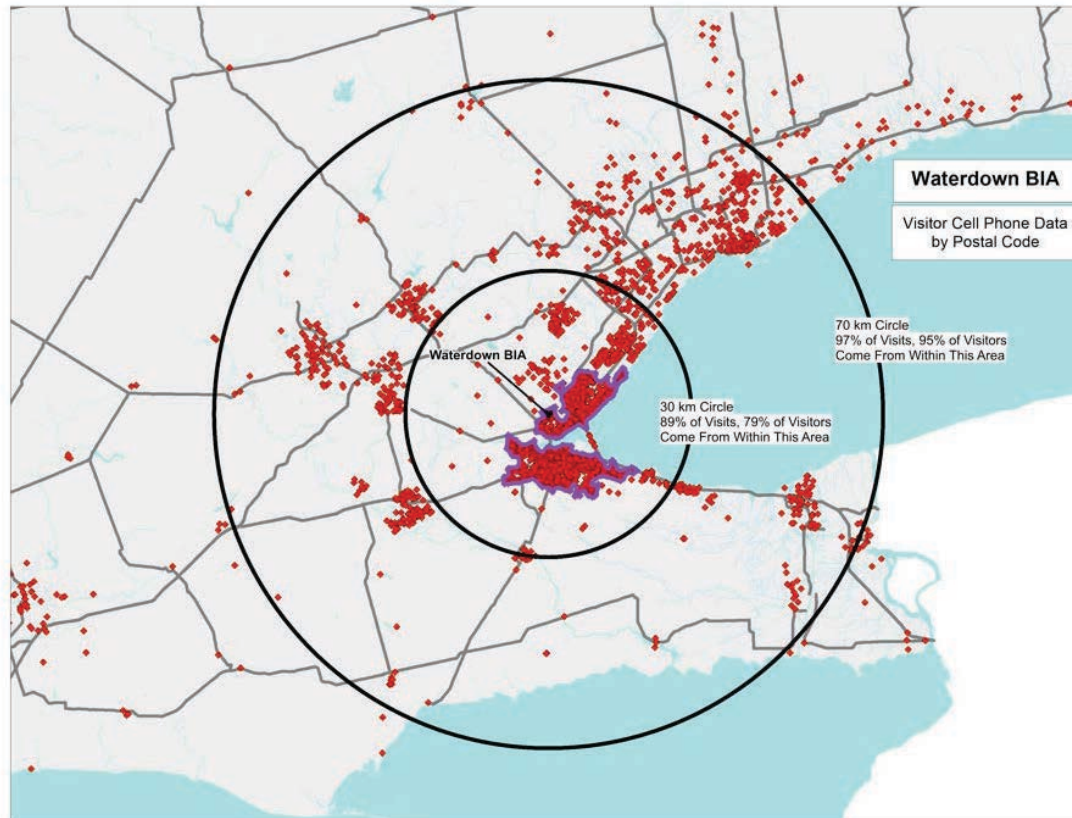
- Visitation to Flamborough increased significantly from 2006 to 2011.
- Visitation increased 19.5% over the five-year period.
- Most of the increase was due to local Flamborough residents visiting within Flamborough rather than leaving the area.
- Most communities have increased their visitation to Flamborough except for Dundas.
- Leakage out of Flamborough continued to places such as Burlington, the former City of Hamilton, and other further distance places such as Mississauga and Oakville.



3.2 Cell Phone Data

- The trade area review has been supplemented with a review of a year-long visitation sample based on cell phone data (November 2015 to November 2016) that correlates postal code data for visitors in the BIA who have one of the company's registered apps and is in the BIA for a minimum of ten minutes.
- The data was supplied by Uber Media. (not associated with the driving company). Their affiliate, UberRetail, took the data they collected and converted it into location data. Then it went to a company called BI Spatial that cleaned the data further, adjusting the time stamps to localized dates and times and adding the postal code.
- The data represented a sample of visitors to Downtown Waterdown. The analysis combined with other elements such as observational data, key person interviews, trade area analysis and competitive positioning re-enforced the overall findings.
- The visitor had to spend more than 10 minutes in the BIA. As a result, commuters, were excluded.
- In total, there were 12,454 total visits from the sample of visitors. Within that sample, 3,990 were unique visitors. This means that a smaller group of visitors tends to come to Downtown Waterdown BIA very frequently. Average visitation is 3.1 times per year which is relatively frequent.
- The range of home postal codes for the ping data was very extensive across the Greater Golden Horseshoe and Southwestern Ontario
- This was an early testing stage with Downtown Waterdown BIA as well as the four other BIAs in Hamilton that were being reviewed at the same time. The process revealed that the cell phone ping data matches well against the visitor profiles and tended to be an accurate portrayal. As with any sample, it was not 100% of the population, but when this data was combined with key person interviews, observational data, trade area analysis it did tend to re-enforce common findings.

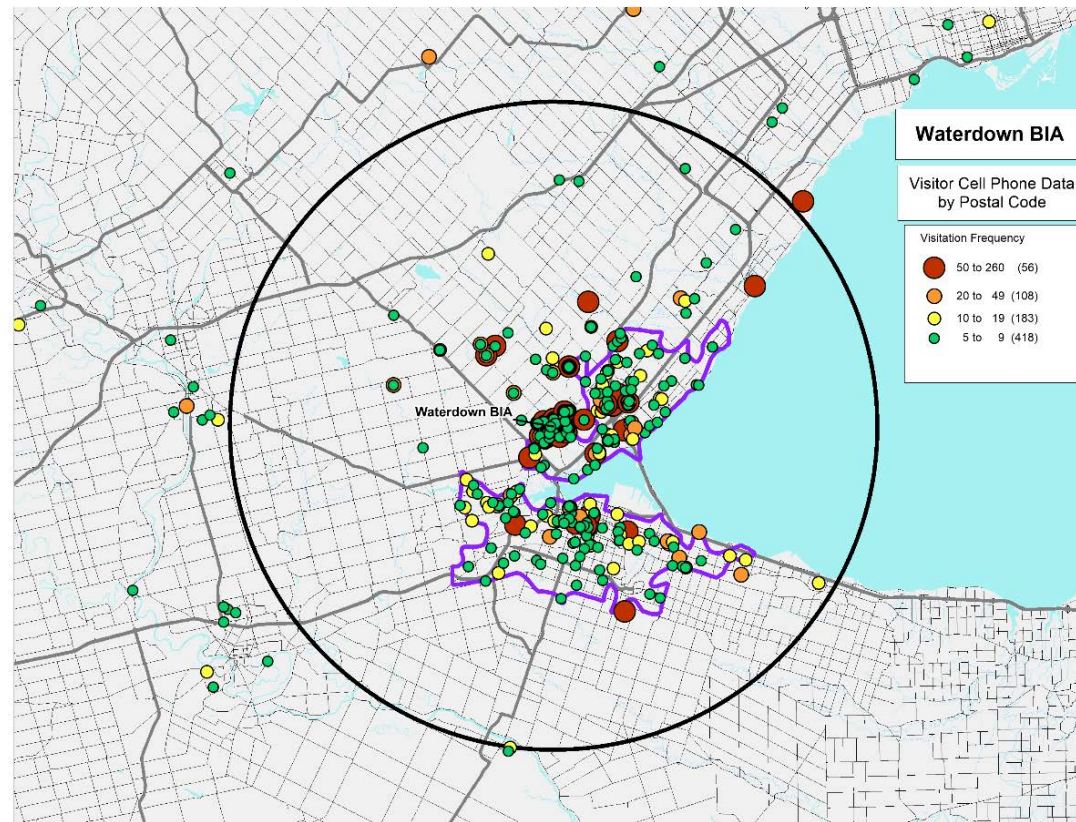
Downtown Waterdown BIA Visitors, Cell Phone Ping Data Postal Codes – November 2015 to November 2016



Source: GeoMarketing Solutions

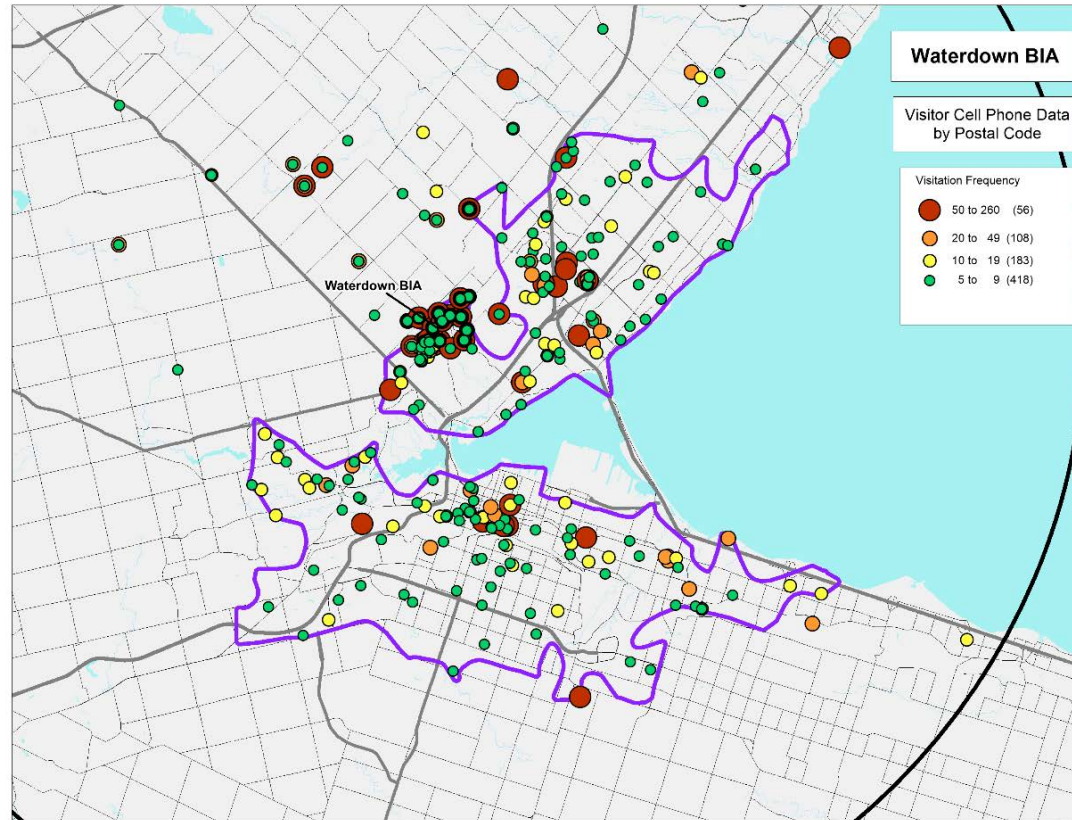


Downtown Waterdown BIA Visitor Cell Phone Corresponding Postal Codes and Visitation Frequency – November 2015 to November 2016



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

Downtown Waterdown BIA Cell Phone Ping Data Postal Codes and Visitation Frequency – November 2015 to November 2016



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



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

	Number of Visitors	Average Distance Travelled	Average Household Income	Median Age	% Some University or Higher
Waterdown 2016 Demographics			\$129,209	38.2	30.9%
Visitation Frequency					
Frequent Visitors (100 + Visits)	14	3.73	\$105,824	41.11	29.56
All Visitors Less Frequent	5,950	20.20	\$122,564	40.94	30.99
1 Visit	3,621	24.73	\$120,056	40.86	31.03
2 to 5 Visits	1,705	14.21	\$125,631	41.24	30.92
6 to 12 Visits	375	9.75	\$128,131	40.92	31.35
13 to 24 Visits	134	9.19	\$131,217	39.33	30.36
25 to 49 Visits	69	11.13	\$127,006	40.79	29.44
50 to 99 Visits	42	5.21	\$134,184	40.65	31.68
Time of Day					
6 am to 10 am (weekday only)	1,100	14.06	\$124,210	40.71	30.41
10 am to 2 pm (weekdays only)	2,270	17.67	\$123,754	40.98	30.91
2 pm to 6 pm (weekdays only)	2,622	19.08	\$123,590	40.85	30.96
6 pm to 10 pm (weekdays only)	2,360	15.94	\$127,643	40.96	31.49
10 pm to 2 am (weekdays only)	793	11.92	\$125,932	40.74	31.26
Weekday and Weekend					
All weekday	4,655	18.47	\$122,591	40.95	30.97
All Weekend	2,593	18.56	\$126,856	40.83	31.35
Events and Programs					
Waterdown Farmers' Market (May to Sept Sat 8 am to 1 pm)	284	13.22	\$127,500	40.18	31.17
Art and Music Streetfest May 20 to 22	165	18.04	\$121,961	40.75	31.31
Visited Before Art and Music Streetfest	82	9.22	\$128,236	40.49	32.16
Returned Visitation After Art and Music Streetfest	93	11.30	\$128,948	40.98	32.47
No Return Visitation After Art and Music Streetfest	72	26.75	\$113,554	40.49	29.91
Rib Fest Jun 30 to Jul 3	211	16.69	\$122,374	41.01	31.61
Visited Before Rib Fest	133	11.13	\$127,395	41.59	30.40



Returned Visitation After Rib Fest	125	10.38	\$120,844	40.94	31.16
No Return Visitation After Rib Fest	86	25.85	\$124,645	41.13	32.28
Arts Fest Aug 20 and 21	112	11.62	\$132,069	41.85	32.61
Returned Visitation After Arts Fest	75	4.78	\$132,512	41.23	32.45
Visited Before Arts Fest	78	8.92	\$127,105	41.92	32.78
No Return Visitation After Arts Fest	37	25.50	\$131,266	42.97	32.89
Tree Lighting Nov 19 3 pm to 7 pm	25	9.95	\$115,615	39.17	29.55

Source: GeoMarketing Solutions

Findings

- Visitation frequency tends to be local (within 5 to 12 km).
- As visitation frequency increases, average household income rises.
- From 6 pm to 10 pm, Downtown Waterdown attracts those with the highest household incomes and a high proportion of having a university degree or higher. These visitors are the time starved dual income workers.

Farmer's Market

- Those visitors in Downtown Waterdown during the Farmers' Market, have a slightly higher household income compared to other visitors in Downtown during other times of the weekend.

Arts and Music Streetfest

- The Art and Music Streetfest attracted visitors with a similar household income and education level as other Downtown visitors but they were slightly younger.
- Those who had been to Downtown Waterdown before the event had a higher household income, were well educated, and had a younger median age. New people attracted to the event had slightly lower household incomes and were younger.
- Those who returned to Downtown Waterdown after the event had a higher household income, were well educated, and had a younger median age.
- Those that did not return to Downtown Waterdown after the event had lower household income and were less well educated.

Rib Fest

- Rib Fest visitors had similar household incomes, age, and education as the average Downtown visitor.
- 62% of Rib Fest visitors had been to Downtown Waterdown prior to the event. The event drew a high proportion of visitors who had not been in the area before.
- Those who returned to Downtown Waterdown after Rib Fest had a slightly lower household income, were well educated, and slightly younger median age.



- Those who did not return to Downtown Waterdown after Rib Fest had higher household incomes, were very well educated, and were slightly older.

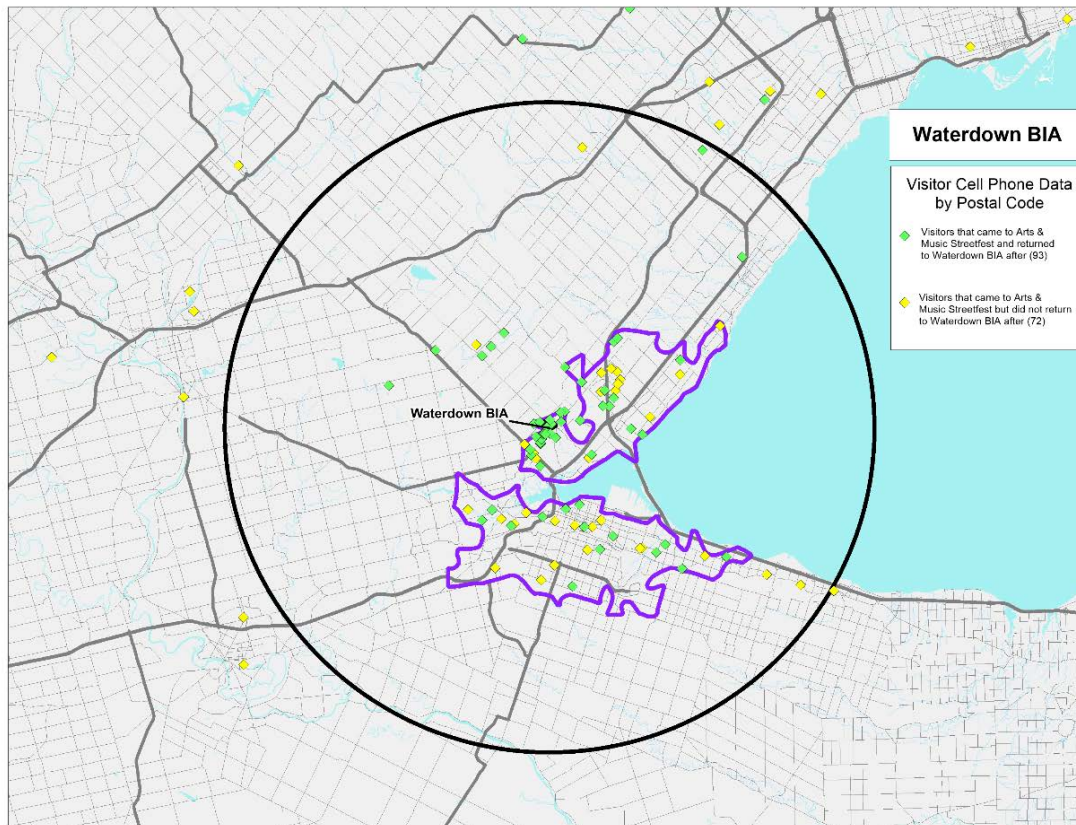
Arts Fest

- 70% of visitors to Arts Fest had been to Downtown Waterdown from Nov 2015 to Aug 2016
- The average Arts Fest visitor had very high household income, was well educated, and was slightly older.
- 67% of Arts Fest attendees were in Downtown Waterdown after the event. These returnees had a slightly lower level of household income.
- Those Arts Fest visitors who did not return to Downtown Waterdown after the event had very high household incomes and were older.

Note: although the preceding analysis notes a difference in household income, it should be noted that all household incomes of visitors are above the average

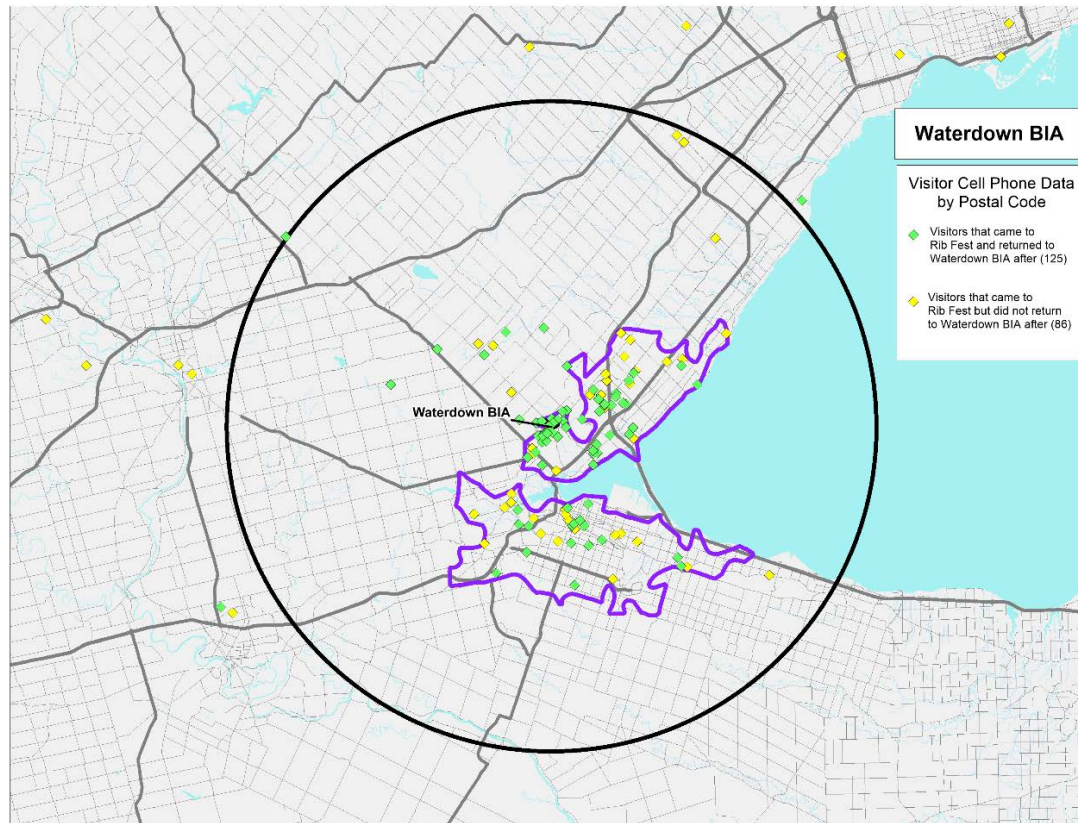
The following map illustrates visitor's home address for Arts Fest, Rib Fest, and Arts and Music StreetFest and correspondingly whether that event attendee returned to the BIA after the event.

Arts and Music StreetFest Visitation – Return and Non-Return Visitors



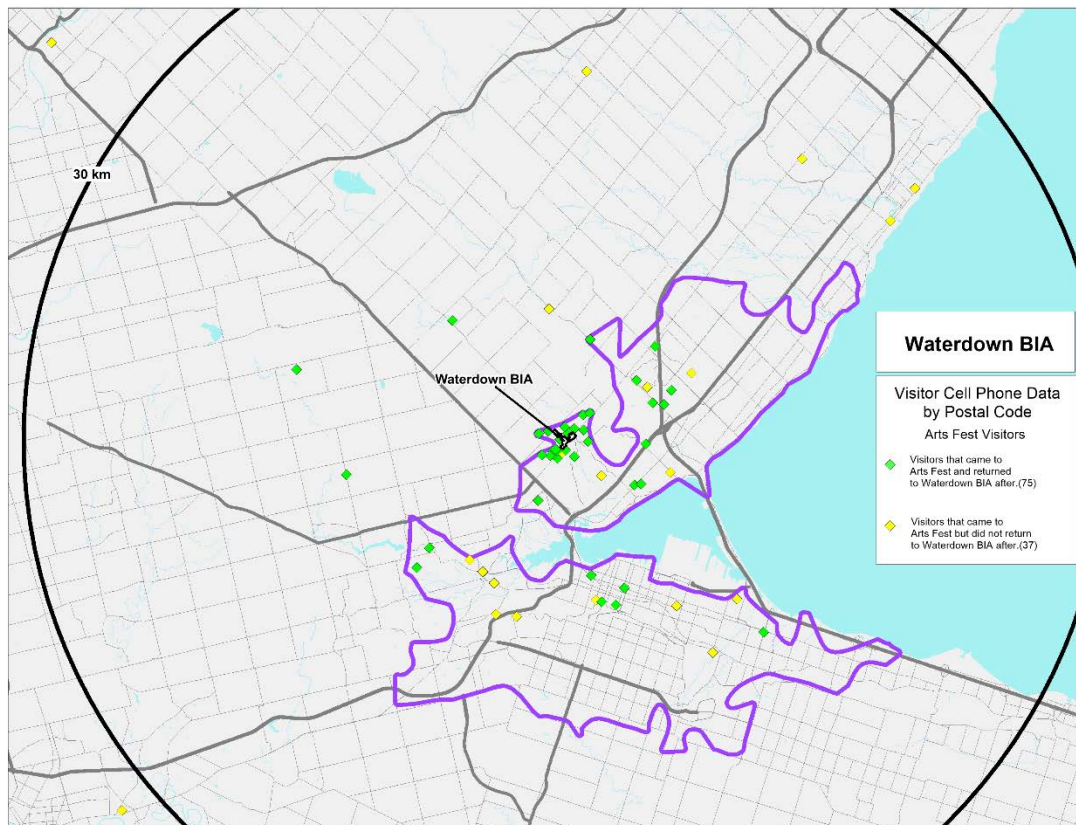
Source: GeoMarketing Solutions

Rib Fest Visitation – Return and Non-Return Visitors



Source: GeoMarketing Solutions

Arts Fest Visitation – Return and Non-Return Visitors



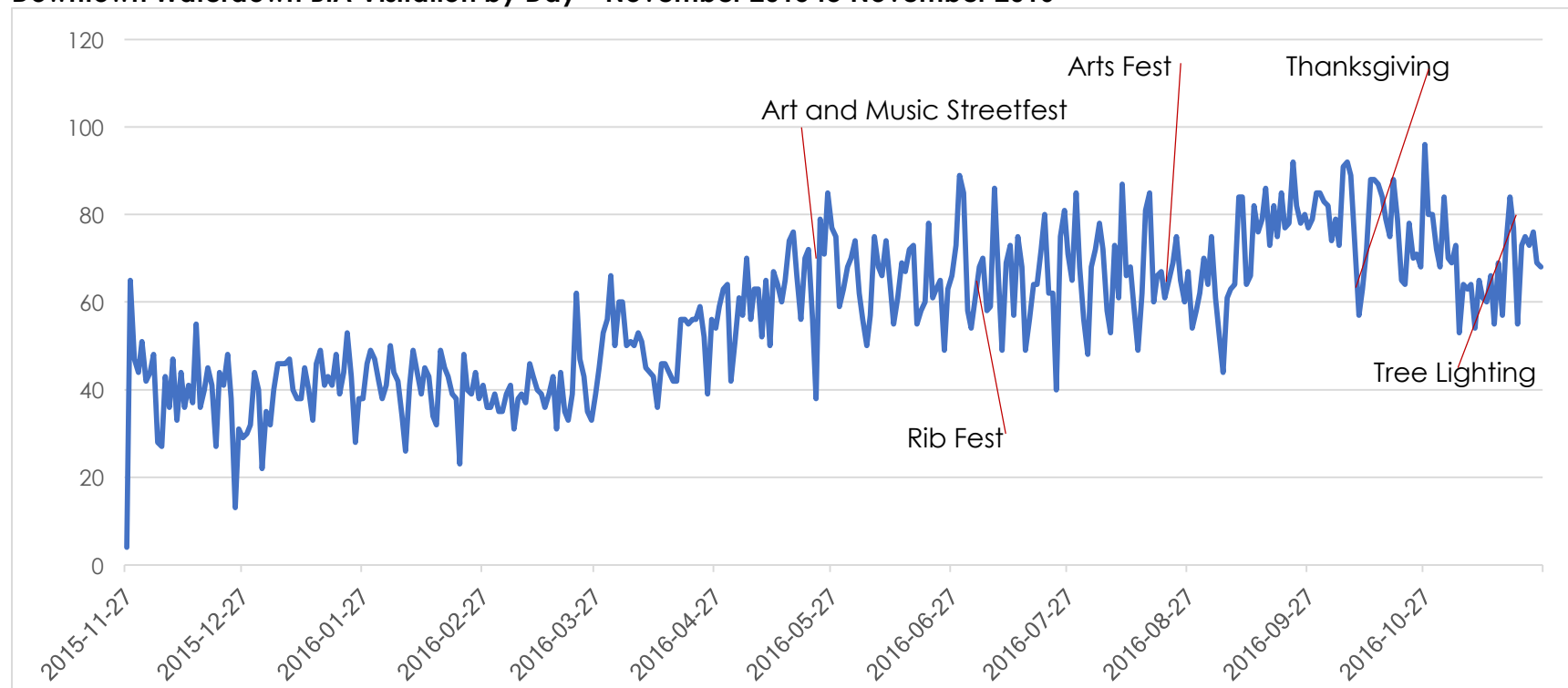
Source: GeoMarketing Solutions

Findings

- Arts and Music StreetFest achieved some mixed results of people returning from further away but the majority of those from further away did not return.
- Those who attended Arts Fest came primarily from the smaller local area of Waterdown. Those who came from further away such as Oakville, Guelph, as well as Dundas did not return to Waterdown after having visited.



Downtown Waterdown BIA Visitation by Day – November 2015 to November 2016



Source: GeoMarketing Solutions

Findings

- Visitation to Downtown Waterdown BIA has been increasing throughout the 2016 year.
- Visitation increased dramatically in March 2016 and has been sustained throughout the fall period of 2016.
- Normally high visitation occurs later in the weekday on Thursday and Fridays and some Wednesdays.
- During September and into October visitation was consistently high on Thursday, Friday, and Saturday.
- Leading up to Thanksgiving had the highest visitation rates. The farmers' market was probably a factor in driving visitation growth in the fall harvest time. Throughout September and early October, Saturday visitation was high.
- Most events are focused on long holiday weekends which included portions of the weekend that businesses would be closed.



Visitation – Day of the Week

Day of the Week	Sample Visitation
Sunday	2,667
Monday	2,796
Tuesday	3,153
Wednesday	3,086
Thursday	3,157
Friday	3,151
Saturday	3,004
Total	21,014

Source: GeoMarketing Solutions

Findings

- Thursday, Friday, and Tuesday are the busiest days of the week.
- However, all days are busy throughout the week including Sunday and Monday.
- Families and households with busy lives will try to get their errands completed by Thursday or Friday in order to enjoy the weekend.
- As noted, during the early fall up to Thanksgiving, Saturday becomes a busy visitation day in Downtown Waterdown.

Implications for Downtown Waterdown BIA

Trade areas include:

- Immediate: 5-minute walking distance measured by 400-meter radius from Downtown Waterdown at Dundas St. E. and Main St.
- Waterdown and Nearby Adjacent
- Secondary Trade Area: Waterdown, Flamborough, Dundas, Lower City (west), Burlington and Southwest Oakville
- 60-minute drive time



Trade areas include:

- Immediate: 5-minute walking distance measured by 400-meter radius from Downtown Waterdown at Dundas St. E. and Main St.
- Waterdown and Nearby:
- Secondary Trade Area: Waterdown, Flamborough, Dundas, Lower City (west), Burlington and Southwest Oakville
- 60-minute drive time



Population, Households, and Daytime Workers

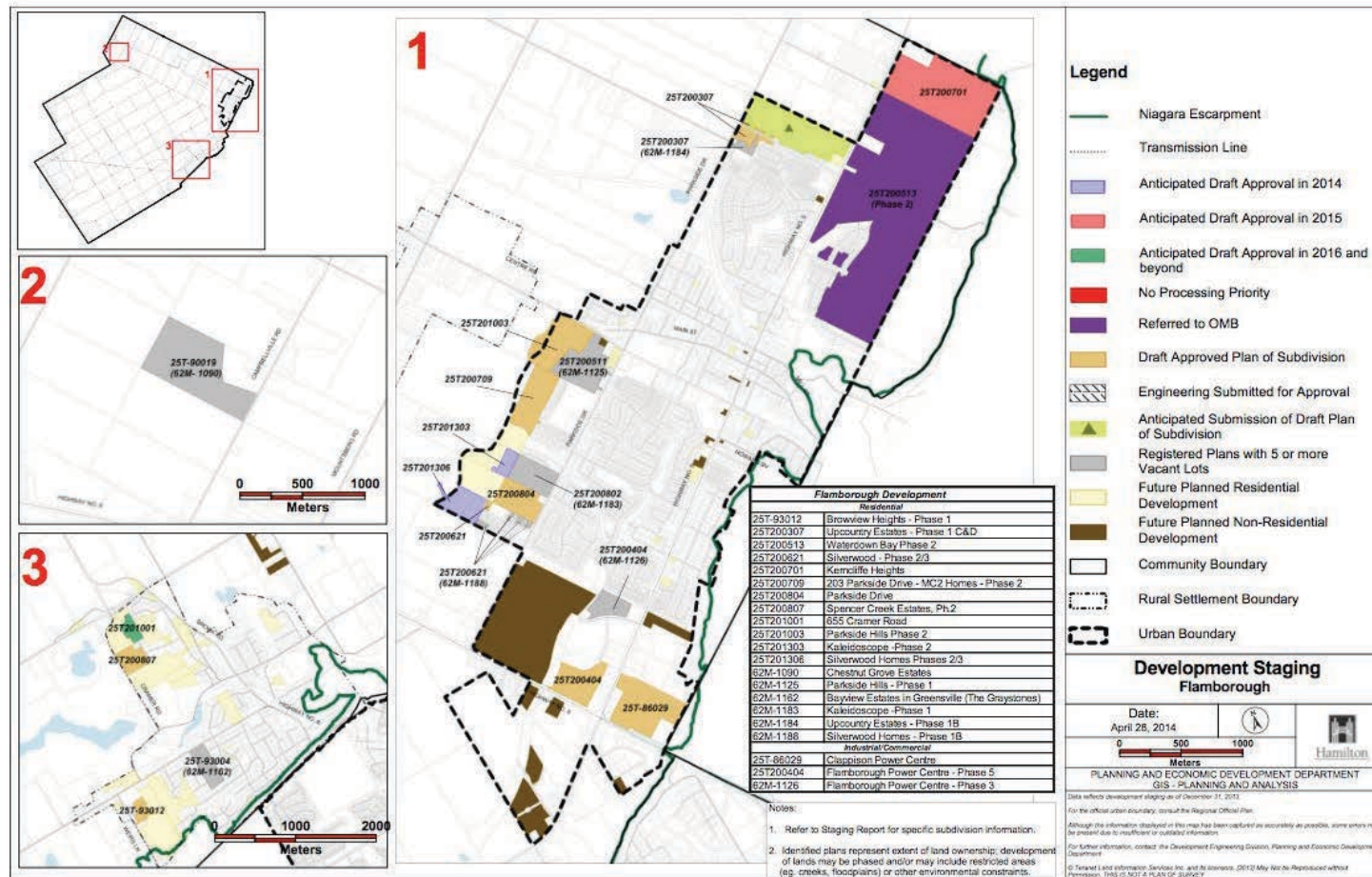
	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
2011 Population	1,424	18,048	346,632	519,950	4,940,729
2016 Est. Population	1,512	19,876	374,586	555,841	5,428,211
Annualized Population Growth Rate	1.2%	1.9%	1.6%	1.3%	1.9%
Households	640	7,009	155,674	220,822	2,059,081
Annualized Household Growth Rate	0.7%	1.6%	1.2%	0.9%	1.4%
Daytime Worker Population	2,291	5,471	223,599	228,040	3,002,180

Source: Statistics Canada, Environics Estimates 2016

Findings

- Within a five-minute walking distance of Dundas St. E. and Main St. there are 1,512 residents. This is a relatively low population density area. However, the area continues to grow at 1.2% annually as new townhouses and multi-family housing is built resulting in greater intensification. Increasing residential intensification in the Downtown should continue as a key priority.
- Within Waterdown (and nearby), there are approximately 20,000 residents. Waterdown is transforming from a small village/town, into its own “city” type structure (similar to Dundas and Grimsby). By 2031, the City of Hamilton has projected the Waterdown population to grow to 39,400. This is twice the current population.
- The population growth is just slightly higher than the household growth rate. This suggests that young families are still moving into the area and aging in place. However, there does appear to be a ‘levelling off’ as families begin to age. There is a combination of new families as well as more established families moving into the Waterdown area.
- An annualized growth rate of 1.9% is high and accounts for the significant population growth in the Waterdown North, Waterdown South, and Upcountry areas.
- There is sizeable workforce in Downtown Waterdown compared to other areas. There are 2,291 workers within five-minute walking of Dundas St. E. and Main St. and there are 5,471 workers in the Waterdown area. This includes professional workers, retail workers, and trades/transportation related workers.

Staging of Development 2104 - 2016 (Source: City of Hamilton Planning and Economic Development Department Growth Management Division July 11, 2014)





Age Profile, Gender, and Ethnicity

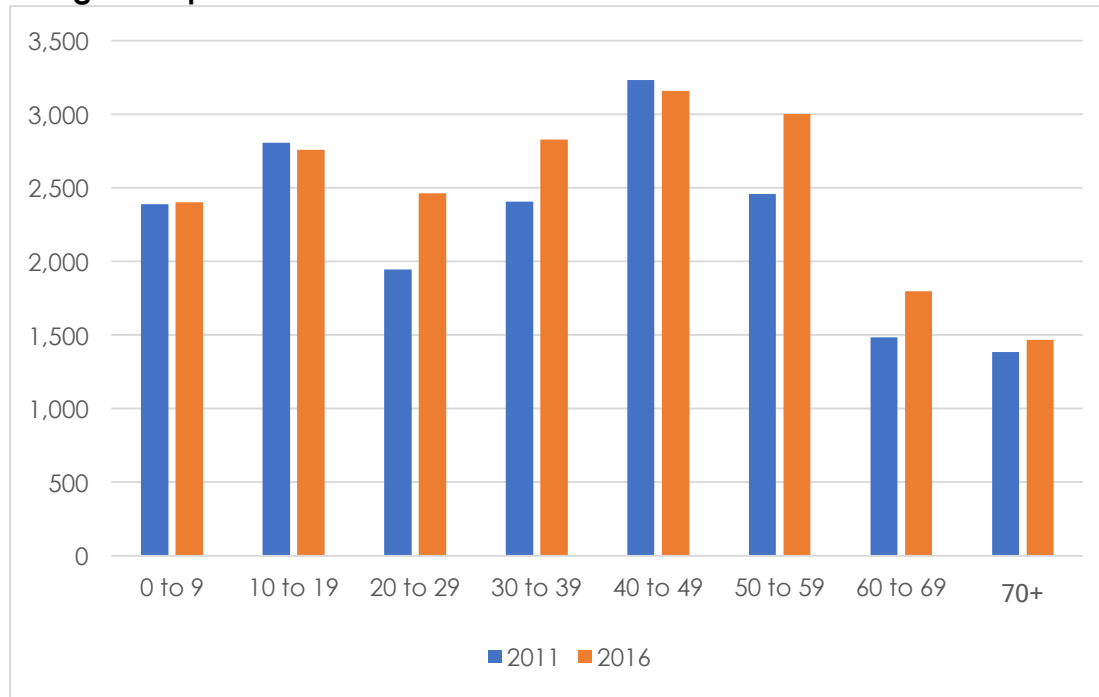
	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Age Profile					
0 to 9	12.0%	12.1%	10.0%	10.3%	10.8%
10 to 19	10.8%	13.9%	10.9%	11.1%	11.1%
20 to 29	13.1%	12.3%	14.0%	14.8%	14.7%
30 to 39	16.3%	14.2%	13.0%	12.9%	14.9%
40 to 49	12.8%	15.9%	13.8%	12.7%	13.9%
50 to 59	14.6%	15.1%	14.8%	14.9%	14.2%
60 to 69	11.4%	9.1%	11.2%	11.6%	10.3%
70+	9.0%	7.4%	12.3%	11.6%	10.0%
Median Age	38.6	38.2	41.6	40.7	38.9
Gender					
Male/Female	47.0/53.0	49.4/50.6	49.0/51.0	49.3/50.7	49.1/50.9
Ethnicity					
Visible Minority	6.9%	7.0%	15.8%	16.9%	36.8%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Waterdown is very family oriented.
- There is a high proportion of older families with children.
- 26% of the Waterdown population is under 20 years of age.
- The dominant age range is 30 to 59 years of age.
- There is a high proportion of females living in the area and a very low proportion of visible minorities.

Change in Population Waterdown Trade Area – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

Findings

- The age profile has shifted from one that had a dominant age group of 40 to 49 year olds with children to one whereby there is a more equal proportion of almost all age groups (except seniors).
- From 2011 to 2016, there was significant growth in young adult and older adult age population.
- The number of children remained approximately constant.



Household Size and Marital Status

	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Household Size					
1 Person	28.1%	15.9%	31.0%	27.7%	26.3%
2 Person	38.1%	31.9%	32.5%	32.7%	29.7%
3 Person	16.5%	18.3%	14.7%	16.0%	16.5%
4 Person	11.1%	22.7%	14.6%	15.3%	27.5%
5 + Persons	6.2%	11.2%	7.2%	9.2%	
Person Per Household	2.37	2.80	2.36	2.47	2.60
Marital Status					
Single	27.3%	24.3%	28.3%	29.3%	30.3%
Married, Common Law	45.4%	55.9%	46.7%	53.5%	54.8%
Separated, Divorced, Widowed	17.3%	19.8%	25.0%	17.2%	14.9%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Household sizes in Waterdown are large. The number of persons per households is 2.80.
- 55.9% of the residents aged 15 and older are married or in a common-law relationship.
- In the Dundas St. E. and Main St. area there is a higher proportion of smaller households.



Education, Occupation, and Home Ownership

	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Education					
Less than High School	9.0%	13.5%	15.3%	21.0%	18.1%
High School Graduate	24.1%	24.1%	24.9%	26.2%	24.6%
College, Diploma	33.4%	31.5%	26.1%	26.6%	23.1%
University Graduate	33.5%	30.9%	33.7%	26.2%	34.2%
Occupation					
Management	21.1%	28.8%	27.9%	23.2%	27.4%
Science	8.2%	8.3%	8.0%	6.2%	8.2%
Health	4.6%	5.1%	6.4%	7.6%	5.4%
Govt, Ed., Social Services	17.0%	13.5%	13.2%	12.4%	11.7%
Arts, Culture, Recreation	3.0%	2.8%	3.5%	2.8%	3.5%
Sales and Service	24.9%	23.1%	23.4%	23.9%	23.8%
Other	20.8%	7.5%	15.5%	21.2%	17.5%
Labour Force Participation	66.3%	71.5%	61.1%	58.3%	64.6%
Ownership to Renters	52.8/47.2	88.0/12.0	66.7/33.3	69.9/30.4	66.8/33.2

Source: Statistics Canada, Environics Estimates 2016

Findings

- Local Waterdown residents are well educated and a high proportion work in management. In addition, there is a relatively high proportion who work in government, education, and social service type professions.
- Waterdown residents do work locally but many commute and work in places such as the Burlington region or in the GTA. They commute by car and public transit.
- The labour force participation rate is very high. Local area residents have extremely busy lives working and taking care of their children. Long commutes take away from leisure time. As such, shopping can be either (a) fast and efficient or (b) rooted as a family affair.



Travel to Work

	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Travel to Work					
Vehicle - Driver or Passenger	83.1%	88.8%	78.3%	81.0%	71.8%
Public Transit	10.5%	6.3%	12.6%	11.2%	19.9%
Walk	5.2%	3.8%	6.7%	5.9%	5.7%
Bike	0.1%	0.3%	1.3%	1.0%	1.5%
Other	1.1%	0.8%	1.2%	1.0%	1.1%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Workers rely heavily on vehicular access to work including driving or being dropped off at the nearest GO Station.
- A small proportion of people live near Downtown and can walk Downtown.



Household Income

	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Household Income					
< \$20,000	5.2%	4.5%	10.8%	11.3%	11.2%
\$20,000 to \$39,999	13.2%	7.0%	15.3%	16.2%	14.8%
\$40,000 to \$59,999	13.6%	7.9%	15.1%	16.3%	15.0%
\$60,000 to \$79,999	12.5%	10.8%	12.7%	13.9%	13.3%
\$80,000 to \$99,999	13.3%	13.7%	10.4%	9.2%	11.0%
\$100,000 to \$149,999	21.2%	25.4%	17.8%	17.7%	34.7%
\$150,000 to \$200,000	11.6%	18.6%	9.2%	7.7%	
\$200,000 +	9.4%	12.0%	8.7%	5.6%	
Average Household Income	\$111,302	\$129,209	\$101,629	\$90,192	\$105,305
Real Annualized Growth in Household Income	1.7%	1.4%	0.5%	0.9%	0.6%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Average household income is very high. In Waterdown the average household income is \$129,209. This is 43% higher than elsewhere in Hamilton.
- As stated, there is a very high labour participation rate and often both adults will work.
- While there is, higher disposable income compared to elsewhere, the families in Waterdown lead very busy lives where shopping time is a trade-off for family time. As noted, shopping and errands carry on into the early evening.
- Real annualized household income growth is 1.4% and accounts for a high growth rate in disposable income. Families are moving out of the early career years and into senior management level positions. This affects their career shopping behaviour.



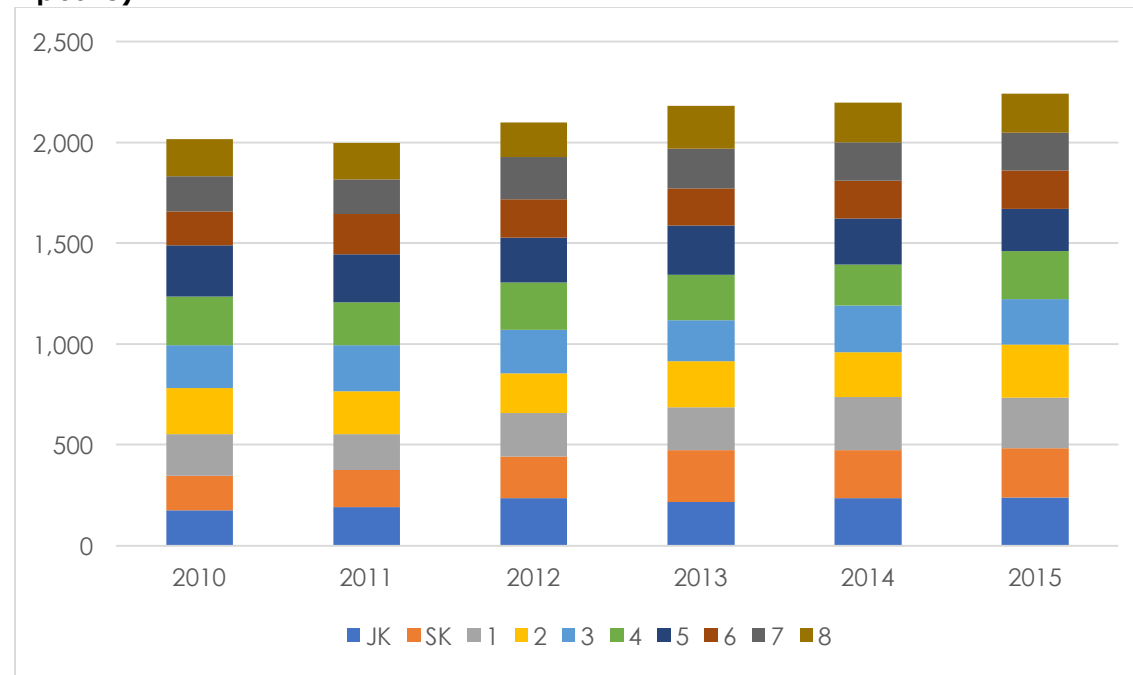
4.1 New Residential Developments

There are several Downtown projects including Chelton Homes View, Dawn Victoria's The Tannery among others.

4.2 School Enrollment

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

School Enrollment 2010 to 2015 (Allan A Greenleaf, Guy Brown, Mary Hopkins, Guardian Angel, and St. Thomas the Apostle)



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

Findings

- School enrollment continues to grow significantly.
- The number of Junior Kindergarten and Senior Kindergarten students has remained relatively stable from 2013 to 2015.
- Enrollment increases have continued at the Grade 6 to 8 level as well as Grade 1 and 2.



- More established families are moving into Waterdown rather than new families. This may mean that these households already have pre-established shopping routines that may favour other communities such as Burlington or Mississauga. These new families need to see that shopping closer in Waterdown is more convenient and fun.

4.3 Household Expenditure

Household Expenditure

	Five Minute Walking	Waterdown	Secondary Trade Area	Hamilton	60 Minute Drive Time
Women's Clothing and Accessories	\$2,314	\$2,862	\$2,272	\$2,006	\$2,288
Men's Clothing and Accessories	\$1,243	\$1,515	\$1,200	\$1,077	\$1,422
Children's Clothing and Accessories	\$77	\$96	\$61	\$62	\$113
Clothing Gifts	\$89	\$93	\$83	\$79	\$72
Furniture	\$999	\$1,242	\$936	\$1,331	\$1,746
Electronics	\$1,171	\$1,431	\$1,028	\$907	\$1,145
Leisure Goods	\$1,044	\$1,345	\$974	\$861	\$2,872
Florists	\$512	\$630	\$469	\$445	\$320
Pet Stores	\$513	\$536	\$409	\$393	
Food from Stores	\$8,963	\$11,002	\$8,691	\$8,514	\$8,642
Alcohol Purchased from Stores	\$1,901	\$2,069	\$1,725	\$1,546	\$1,604
Food from Restaurants	\$4,161	\$5,059	\$4,002	\$3,582	\$3,917
Alcohol from Restaurants	\$676	\$770	\$624	\$511	\$730
Health and Pharmacy Goods	\$2,464	\$2,904	\$2,507	\$2,364	\$2,496
Personal Care Services	\$1,183	\$1,464	\$1,157	\$983	\$1,189
Packaged Travel	\$1,004	\$1,339	\$963	\$797	\$850
Laundry and Dry Cleaning	\$85	\$87	\$86	\$119	\$196
Recreational Services	\$622	\$890	\$691	\$480	\$541
Movies	\$89	\$126	\$100	\$92	\$196
Live Sporting Events	\$111	\$144	\$86	\$71	\$88
Live Performing Arts	\$196	\$248	\$162	\$202	\$163

Source: Statistics Canada, Environics Estimates 2017



Findings

Households in the immediate area spend a higher proportion of their budget on:

- Sporting events
- Alcohol from stores
- Pets and pet supplies
- Electronic goods
- Recreation memberships
- Packaged travel
- Children's clothing and accessories
- Alcohol from stores

Based on the priority household spending allocations, the following themes emerge:

- Overall, households spend money on entertaining and the home including audio video equipment, pets and pet supplies, and children's clothing.
- Due to their heavy work/life balance, households like to go out and enjoy themselves at sporting events, travel, and going out for drinks with friends. Their higher household incomes allow them to enjoy these diversions. The work life balance is also restored by working out at nearby fitness facilities.
- Downtown Waterdown has two characteristics. It needs to provide convenience for those busy households that are striving to find a work/life balance including late night shopping, ease of parking, ample parking, well-lit and secure, and good value. It also needs to provide an opportunity for a diversion from their lives that is fun, experiential, enjoyable, etc. However, for both characteristics, there needs to be opportunities for socialization with friends and neighbours.



5.0 Other Major Target Markets and Customer Visitation

As stated, the projected population by the City of Hamilton for Waterdown is 39,400 by 2031.

With that comes increased employment. While Waterdown is still primarily a bedroom community, there is a growing daytime worker population. It is anticipated that the Downtown workforce will continue to grow.

Daytime Workers

In Waterdown, there are 5,471 daytime workers. This is higher than in neighbouring areas such as Dundas. Daytime workers include office workers as well as other employees such as retail and hospitality workers.

Generally, office workers as well as hospitality workers tend to spend at least \$1,500 on breakfast, lunch, and snacks during the day each year. For some office workers, it can be as high as \$2,300 annually. (Based on previous work 360 Collective has done for other Downtowns and employment environments.)

This represents over \$8.2 million in potential food service sales based on \$1,500 expenditure per worker. Downtown Waterdown could capture 25% to 35% of these sales accounting for \$2.0 million to \$2.9 million in breakfast and lunch time sales.

Other Target Markets:

- Waterdown Theatre
- Tourists – overnight and day-trippers
- Other large employers in close proximity to the BIA who may visit for lunch or service needs/errands.

Travel Origin and Destination Survey

The most recent travel origin and destination survey was for 2011. The results of the 2016 survey will be released after this report is completed. The BIA should access the information when completed to update their records.

As stated, there is a healthy workforce in Waterdown. The following table illustrates both where local Flamborough residents work as well as the origin of Flamborough's workforce.



Workforce Characteristics – Origin and Destination for 24 Hour Period

	2011		2006	
	From Flamborough	To Flamborough	From Flamborough	To Flamborough
Flamborough	2,200	2,200	2,700	2,700
Burlington	2,900	800	2,800	700
Hamilton (fmr City)	2,100	1,900	1,900	1,500
Dundas	200	200	300	300
Mississauga	1,500	100	1,000	100
Oakville	1,300	100	1,000	0
Other Hamilton	600	600	500	400
Other Halton	600	100	600	100
Other Peel	200	100	300	0
Toronto	1,000	0	700	0
York	100	0	100	0
Other	200	300	0	200
Total	12,900	6,400	11,900	6,000

Source: Data Management Group, University of Toronto

Findings

- From 2006 to 2011, there has been an increase in the worker population in Flamborough.
- However, there are fewer Flamborough residents who work in Flamborough in 2011 compared to 2006.
- Communities that witnessed a greater number of local Flamborough residents working elsewhere included the former City of Hamilton, but also those communities further away in Mississauga, Oakville, and Toronto.
- The trend for local residents to work further away, accessing via transit has increased.
- There has been an increase in the number of workers who live in the former City of Hamilton who work in Flamborough.

Implications for Downtown Waterdown BIA

- To sustain themselves, businesses cannot rely on evening and weekend visitation. The daytime worker population provides needed sales to businesses to survive throughout the week.

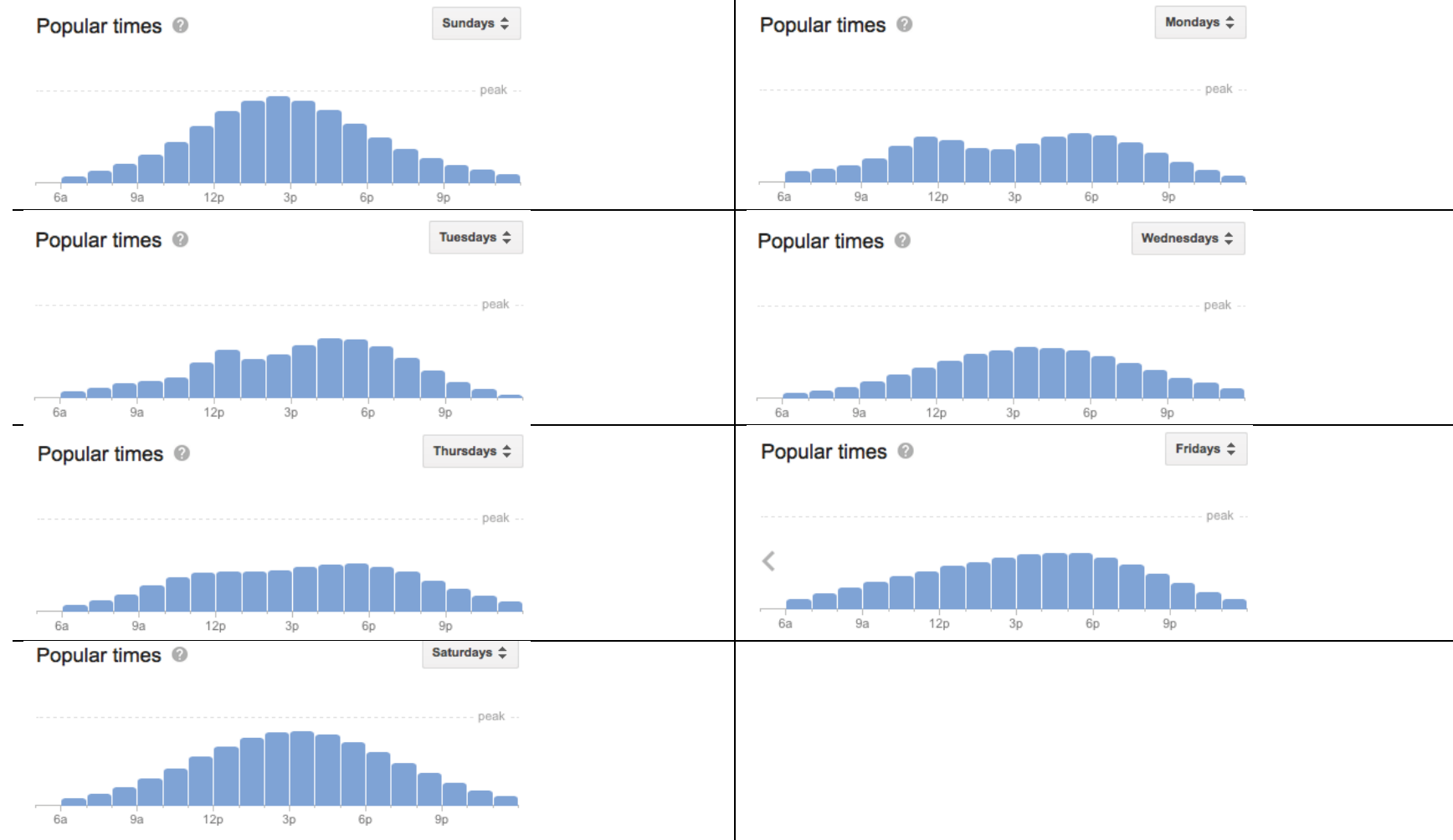


5.1 Customer Visitation Data

Customer Flow Times

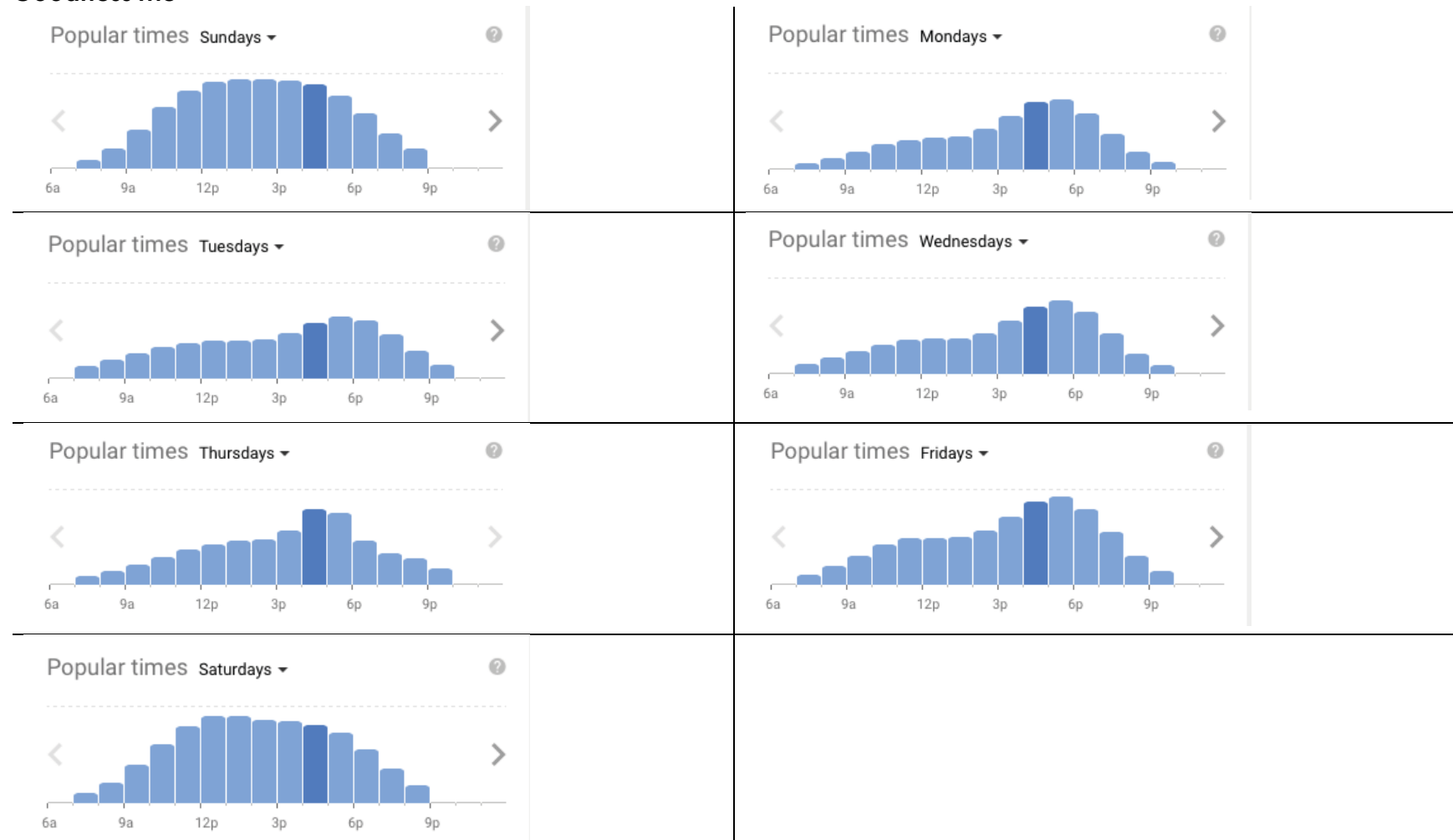
The following graphs illustrate customer visitation at select Downtown Waterdown BIA businesses.

Sobeys





Goodness Me

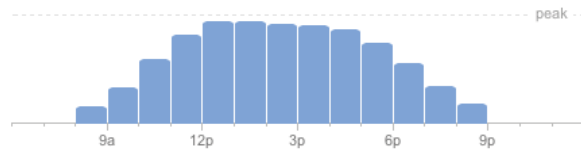




Fortinos

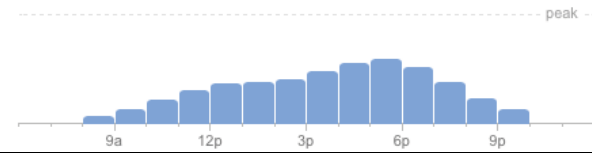
Popular times ?

Sundays ↕



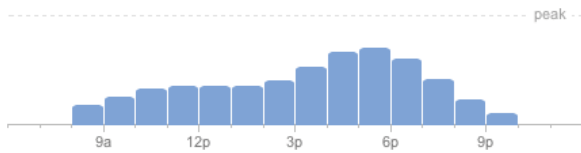
Popular times ?

Mondays ↕



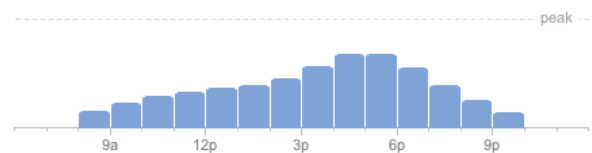
Popular times ?

Tuesdays ↕



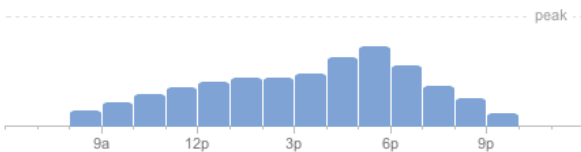
Popular times ?

Wednesdays ↕



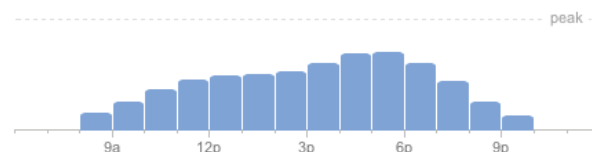
Popular times ?

Thursdays ↕



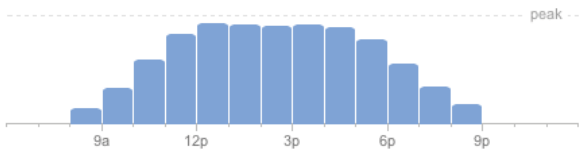
Popular times ?

Fridays ↕



Popular times ?

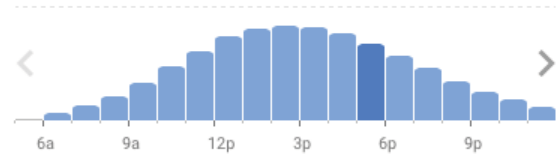
Saturdays ↕





Anytime Fitness

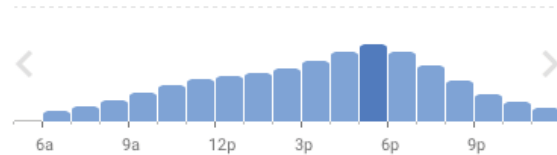
Popular times **Sundays** ▼



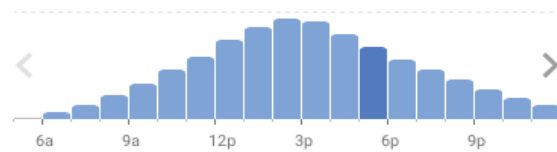
Popular times **Tuesdays** ▼



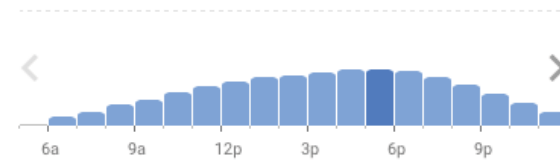
Popular times **Thursdays** ▼



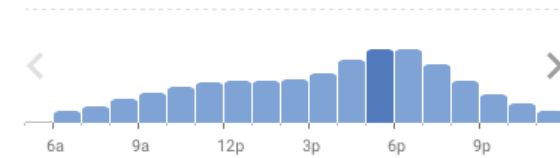
Popular times **Saturdays** ▼



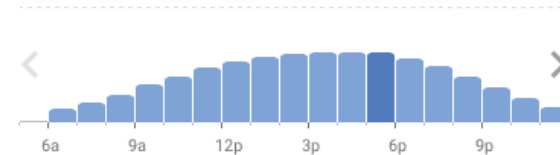
Popular times **Mondays** ▼



Popular times **Wednesdays** ▼



Popular times **Fridays** ▼

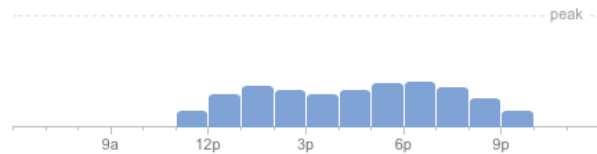




American Hotel

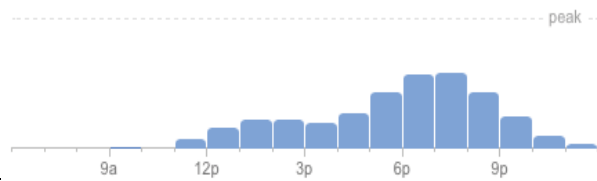
Popular times ?

Sundays



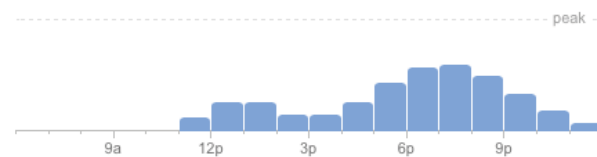
Popular times ?

Tuesdays



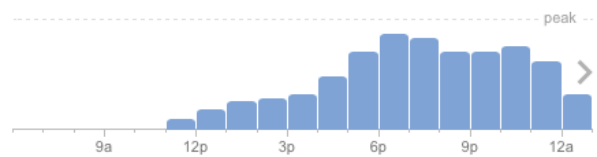
Popular times ?

Thursdays



Popular times ?

Saturdays



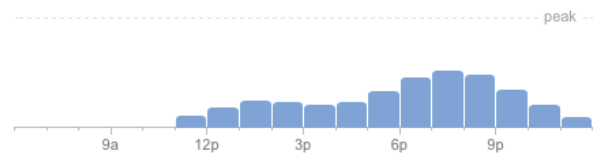
Popular times ?

Mondays



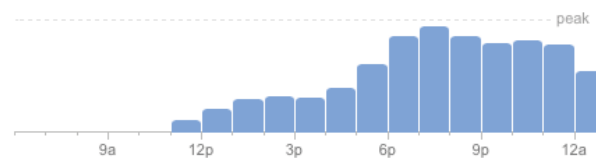
Popular times ?

Wednesdays



Popular times ?

Fridays



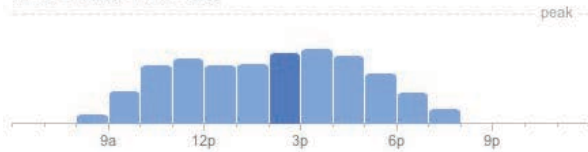


Copper Kettle

Popular times ?

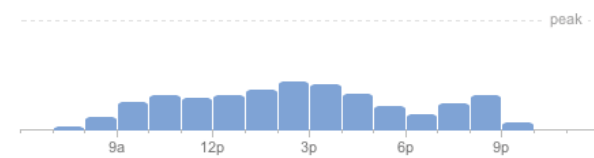
Sundays

Now: Usually a little busy



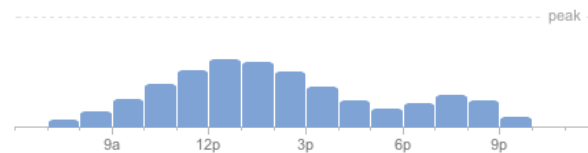
Popular times ?

Mondays



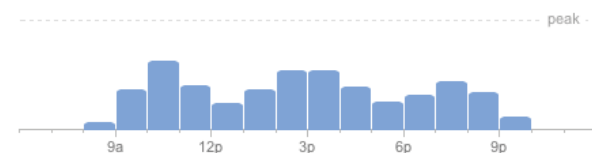
Popular times ?

Tuesdays



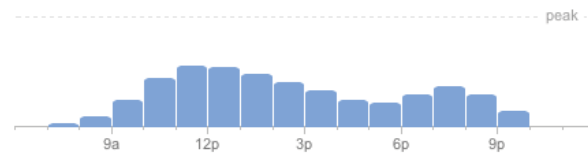
Popular times ?

Wednesdays



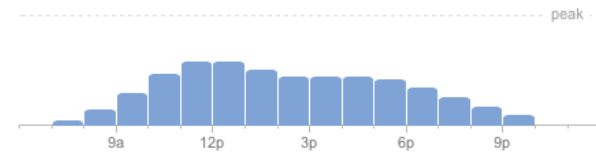
Popular times ?

Thursdays



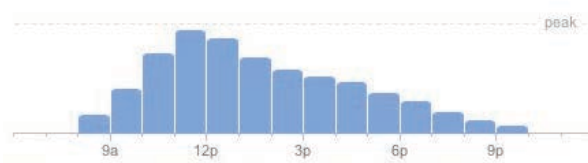
Popular times ?

Fridays



Popular times ?

Saturdays

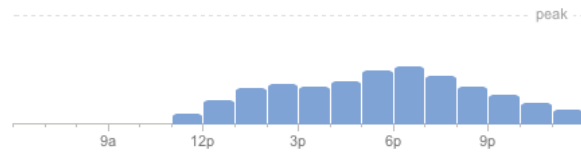




Turtle Jacks

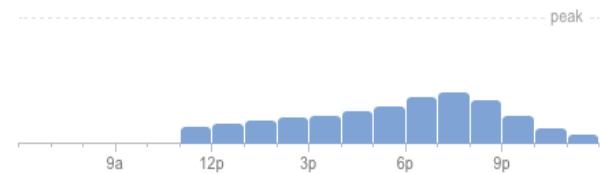
Popular times ?

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Popular times ?

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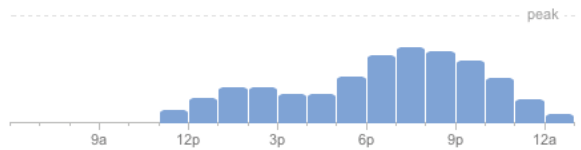
Popular times ?

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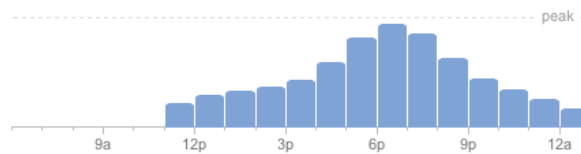
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Saturdays





Findings

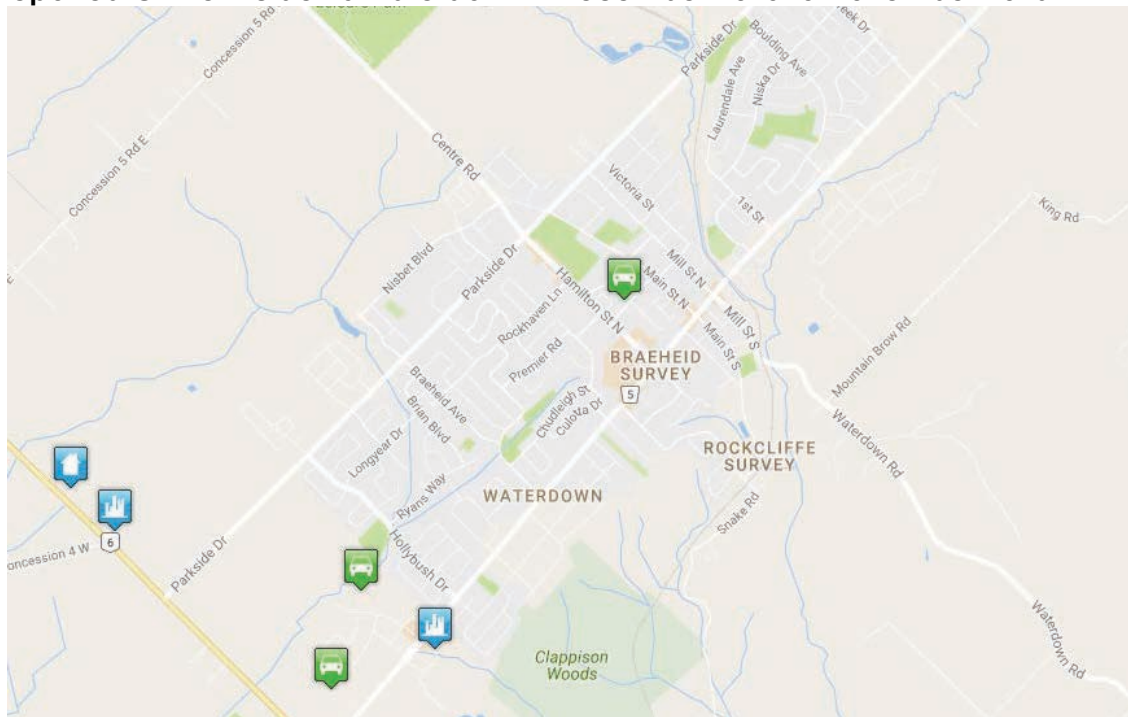
- As stated, due to heavy work/life balance of the local residents, shopping tends to occur later in the evening. In fact, there are two home commute peak times based on local workers returning home followed by regional workers arriving home in the early evening. Places such as Sobey's have peak weekday times from 7:00 pm to 9:00 pm. Others are busy during the evening commute whereby commuters will pick up necessities on their way home from work and before they get home. This includes fitness.
- It was interesting to note how busy some of the food services businesses are during the evening from 7 pm to 9 pm.
- The key for restaurants is to increase their daytime business activity as well. Some food service operators in Waterdown experience a double spike in visitation. This is a desired result.

6.0 Quality of Life Statistics – Crime Statistics and Housing Prices

6.1 Crime Statistics

Within Downtown Waterdown BIA, there was one reported incident from December 2015 to November 2016.

Reported Crime Incidents Waterdown – December 2015 to November 2016



Source: Hamilton Police Services



Auto Theft



Robbery – Individual



Burglary – Commercial



Burglary - Residential



6.2 Housing Prices

As of November 2016, housing prices in Waterdown increased 8.2% from 2015 to 2016. Average house prices increased from a relatively high point of \$518,894 to \$561,519. From 2012 to 2016, average prices increased at an annualized rate of 10.2%. The desirability of living in Waterdown is complemented by having a business community that serves local shopping needs but also as an attractive and pleasant place for neighbours to meet, hang out, and relax.

Waterdown Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$381,118	
2013	\$441,569	15.9%
2014	\$464,742	5.2%
2015	\$518,894	11.7%
2016	\$561,519	8.2%

Source: Realtors' Association of Hamilton and Burlington



7.0 Commercial Audit and Rent Review

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

Downtown Waterdown Commercial Audit – November 2016

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	9	3.4%	9,200	1.9%
Furniture and Home Furnishings	1	0.4%	400	0.1%
Electronics and Appliance Stores	3	1.1%	2,100	0.4%
Building Supply and Garden Equipment	5	1.9%	19,600	4.0%
General Merchandise	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	8	3.1%	11,600	2.4%
Other Retail	6	2.3%	5,800	1.2%
Total Retail	32	12.2%	48,700	9.9%
Food/Drug Retail				
Food and Beverage Stores	17	6.5%	122,000	24.7%
Health and Personal Care Stores	3	1.1%	16,800	3.4%
Total Food/Drug Retail	20	7.6%	138,800	28.1%
Food Services	22	8.4%	41,200	8.4%
Services				
Personal Services	14	5.3%	13,700	2.8%
Personal Services - Beauty	21	8.0%	23,500	4.8%
Financial Services	4	1.5%	7,000	1.4%
Medical Services	45	17.2%	49,400	10.0%
Professional Services	52	19.8%	56,800	11.5%
Recreation Services	12	4.6%	38,900	7.9%
Other Services	18	6.9%	33,400	6.8%
Total Services	166	63.4%	222,700	45.1%
Total Occupied	240	91.6%	451,400	91.5%



Vacant	22	8.4%	41,900	8.5%
Total	262	100.0%	493,300	100.0%

Source: 360 Collective

Findings

- There is approximately 500,000 sq. ft. of retail commercial space in Downtown Waterdown. This accounts for a significant amount of retail commercial space.
- There are 262 businesses.
- Vacancy has increased due to the number of live/work units built that have not been leased/sold, retailers have shifted space (e.g., Shoppers Drug Mart), and other medical centres have not been fully leased at present.
- Services including personal and professional businesses occupy over 45% of the total available square footage. Within that, medical services are a major component. In addition, recreation services are also a major category including dance, fitness, sports, and entertainment.
- Local neighbourhood goods such as grocery, specialty food, and drug stores account for 28% of the total square footage. This is a high concentration of goods and services that attracts locals to shop on a regular basis.
- While retail merchandise accounts for less than 10% of the total square footage, it is equivalent to 48,700 sq. ft. In comparison to other BIAs this is a sizeable amount of retail.
- Food services has been growing but only accounts for 8% of the total square footage.



Downtown Waterdown Commercial Audit – November 2016 Compared to 2009

	2016				2009			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise								
Clothing and Accessories	9	3.4%	9,200	1.9%	9	4.1%	9,700	2.3%
Furniture and Home Furnishings	1	0.4%	400	0.1%	3	1.4%	5,200	1.2%
Electronics and Appliance Stores	3	1.1%	2,100	0.4%	4	1.8%	4,000	0.9%
Building Supply and Garden Equipment	5	1.9%	19,600	4.0%	5	2.3%	19,600	4.5%
General Merchandise	0	0.0%	0	0.0%	3	1.4%	5,500	1.3%
Sporting Goods, Hobby, Book, Music	8	3.1%	11,600	2.4%	18	8.2%	23,700	5.5%
Other Retail	6	2.3%	5,800	1.2%	0	0.0%	0	0.0%
Total Retail	32	12.2%	48,700	9.9%	42	19.2%	67,700	15.7%
Food/Drug Retail								
Food and Beverage Stores	17	6.5%	122,000	24.7%	12	5.5%	111,300	25.8%
Health and Personal Care Stores	3	1.1%	16,800	3.4%	2	0.9%	10,000	2.3%
Total Food/Drug Retail	20	7.6%	138,800	28.1%	14	6.4%	121,300	28.2%
Food Services	22	8.4%	41,200	8.4%	19	8.7%	32,500	7.5%
Services								
Personal Services	14	5.3%	13,700	2.8%	22	10.0%	24,100	5.6%
Personal Services - Beauty	21	8.0%	23,500	4.8%	21	9.6%	23,500	5.5%
Financial Services	4	1.5%	7,000	1.4%	3	1.4%	6,500	1.5%
Medical Services	45	17.2%	49,400	10.0%	27	12.3%	31,700	7.4%
Professional Services	52	19.8%	56,800	11.5%	30	13.7%	37,100	8.6%
Recreation Services	12	4.6%	38,900	7.9%	9	4.1%	25,500	5.9%
Other Services	18	6.9%	33,400	6.8%	21	9.6%	29,300	6.8%
Total Services	166	63.4%	222,700	45.1%	133	60.7%	177,700	41.2%
Total Occupied	240	91.6%	451,400	91.5%	208	95.0%	399,200	92.7%
Vacant	22	8.4%	41,900	8.5%	11	5.0%	31,600	7.3%
Total	262	100.0%	493,300	100.0%	219	100.0%	430,800	100.0%

Source: 360 Collective



Findings

- The total square footage has increased by approximately 60,000 sq. ft.
- The number of businesses has increased
- Vacancy is high in 2016 compared to 2009. However, vacancy is difficult to measure as many units are being constructed and are just being leased.
- Noticeable changes include the decline in leisure retail, the increase in medical services, professional services, and recreational services. Food services has increased moderately. There has been a decline in personal services.
- Moving forward, the business mix in BIAs will be impacted by changing technology including omni-channel retailing (see section on trends for further information). Retail mix is blurring and becoming more and more integrated with technology whereby the exact retail mix is becoming more difficult to classify into unique categories.

Business Mix Recommendations

- Develop a realistic wish list of commercial businesses
- Ensure ideal business mix stays within the parameters set out as per the Downtown Waterdown vision and to ensure a healthy mix of complementary businesses (no one business category should dominate over the others)
- Retail merchandise increase from 12% to 15% (currently 10%)
- Food service increase to 12% (currently 8%)
- Lower vacancy to under 4% (currently 9%)
- Encourage services on upper levels and side streets

7.1 Changes in Downtown Waterdown. BIA Businesses from 2009 to 2016

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



115 Hamilton St. N.: 2016 – new commercial development



115 Hamilton St. N.: 2016 – Restaurant change over to an updated food service offering



2009



2009



2009



170 Hamilton St. N.: 2016 – new mixed use medical centre and residential



25 Hamilton St. N.: 2016 – an updated façade, roof light, and markers



74 Hamilton St. N.: 2016 – new food and beverage concept store, urban grocer



2009



2009



2009



5 Hamilton St. N.: 2016 – vacated retailer site prime for redevelopment



2009 – Shoppers Drug Mart relocated to a larger site



18 Hamilton St. N.: 2016 – ready for redevelopment



2009



324 Dundas St. E.: 2016 – an updated façade



312 Dundas St. E.: 2016 – New multi-storey commercial development



25 Main St. S.: 2016 – new live/work units



2009



2009



2009



31 Main St. S.: 2016 – updated look



2009



219 Dundas St. E.: 2016 – new residential development under construction



2009 – replace former motel



5 Mill St. S.: 2016 – updated façade



2009



246 Dundas St. E.: 2016 – new development







2009

7.2 Downtown Waterdown Area Retail Rents

The following represent active vacant units along Downtown Waterdown and nearby.

Local Area Rents

Address	Sq. Ft.	Rent/sq. ft. (gross)	Comments	
23 Main St. N.	796	\$26.01 gross	Office	
34 Main St. N.	1,800	\$14 (net) and \$21.90 (gross)	Leased	
37 Main St. S	1,338	\$15.70 (\$21 gross)	2 nd Fl Office	

20 Main St.	2,910	\$26 (gross)	Office	
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Findings

- Rents are competitive but are not excessively high.
- There are several vacant units in the new office/retail complex on Rockhaven.
- For new development purposes, rents are high enough to justify redevelopment.



8.0 Investment in Downtown Waterdown BIA






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


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

Current 2016 Development Applications

There are several active and recently completed development applications for places in Downtown Waterdown BIA. These projects add to the intensification of Downtown and redevelop vital ground level retail space. The inclusion of these project in October 2016 is meant to illustrate the depth of investment and development occurring in Downtown Waterdown.

Development Applications

Application Type	Number	Address	Purpose of Application	
Condominium	25CDM-201506	219 Dundas St. E.	To construct 14 townhouse units, 12 back-to-back townhouse units, 6 commercial live/work type units on the ground floor with 11 residential units above under condominium ownership.	
	25CDM-201304	170 Rockhaven Ln.	Plan of Condominium for 13 commercial/office units on the first floor and 40 residential units on upper floors. Partially registered as WCP-522.	
Site Plan	SPA-14-019	317 Dundas St. E.	To permit a two-storey addition on the east side of the existing two-storey building.	
	DA-15-176	272 Dundas St. E.	To demolish existing buildings and construct a 3 storey mixed use building with commercial on ground floor and 10 residential units above.	
	DA-15-122	297 Dundas St. E.	To demolish the existing 2 storey dwelling and construct a new 2 storey building with an office on the ground floor and a residential unit above. Vehicular access will be from Dundas Street East, to the east of the proposed building. – NOTE MAY BE ALTERED TO RETAIN BUILDING	

	DA-16-087	219 Dundas St. E.	To construct 40 dwelling units and 6 commercial units with 81 parking spaces	
Zoning Amendment	ZAR-15-058	100 Hamilton St. N.	To amend zoning to permit the construction of a 6 storey mixed use building containing 90 residential units on floors 2-6, and local commercial uses on the main floor	

Source: City of Hamilton Planning and Economic Development Department

The intersection of Dundas St. E. and Hamilton St. creates an opportunity to create a much-needed connection between the plazas and the historic Downtown. The properties on the north side of Dundas St. E. are vacant and can be redeveloped to anchor the Downtown, create much needed public plaza space, and create the bridge between the two districts.



Commercial Building Permits

Downtown Waterdown BIA Value of Commercial Building Permits

Year	Annual Total	Cumulative Total
2010	\$1,825,000	
2011	\$361,700	\$2,186,700
2012	\$918,000	\$3,104,700
2013	\$8,802,500	\$11,907,200
2014	\$6,039,100	\$17,946,300
2015	\$2,096,600	\$20,042,900

Source: City of Hamilton

Findings

- Commercial development has included the units at 175 Rockhaven, the new Shoppers Drug Mart, properties along Main St. S. and 312 Dundas St. E.
- There has been \$20 million invested in Downtown Waterdown commercial properties from 2010 to 2015.

Grants and Incentives

Downtown Waterdown BIA Development Grants, Loans, and Incentives – Commercial

Year	Actual Cost including CPIG	Office Tenant Improvement Grant
2010	\$44,247.71	
2011	\$0	
2012	\$0	
2013	\$17,100.00	
2014	\$0	
2015	\$0	\$87,970.50
Total	\$61,347.71	\$87,970.50

Source: City of Hamilton

Findings

- There has been very little use of grants and incentives despite the significant investment by owners and developers.



Assessed Value

Downtown Waterdown BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2010	\$71,024,211	
2011	\$76,387,801	7.6%
2012	\$81,934,530	7.3%
2013	\$84,989,301	3.7%
2014	\$88,525,333	4.2%
2015	\$89,823,269	1.5%

Source: MPAC, City of Hamilton

Findings

- From 2010 to 2015, the assessed value of the commercial areas within the Downtown Waterdown BIA have increased 4.8% annually.

Implications for Downtown Waterdown BIA

- Downtown Waterdown is a sought-after place for investment for the growing community.
- To stay competitive with other areas including the power centres and Burlington, local businesses and property owners need to continue to invest in their properties.
- There are redevelopment and infill opportunities throughout Downtown that need to be carefully planned and executed to ensure the commercial areas complement existing areas, add to public realm and place-making including encouraging pedestrian flow patterns throughout all of Downtown, and address parking issues adequately.



Downtown Waterdown BIA Budget

- The BIA budget increased significantly after 2009. The budget is approximately \$200,000 including grants.

Downtown Waterdown BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2010	\$976.19	\$2,433.90		\$3,410.09	\$90,000.00	\$92,000.00
2011	\$905.08	\$2,747.06	\$3,522.47	\$7,174.61	\$102,000.00	\$103,000.00
2012	\$960.58	\$2,644.74	\$4,299.19	\$7,904.51	\$102,000.00	\$102,668.00
2013	\$961.35	\$3,626.01	\$4,249.29	\$8,836.65	\$144,000.00	\$144,000.00
2014	\$1,000.00	\$3,705.56	\$0.00	\$4,705.56	\$151,200.00	\$151,200.00
2015	\$1,316.60	\$5,414.85	\$0.00	\$6,731.45	\$199,950.00	\$199,950.00

Source: City of Hamilton



9.0 Key Person Interviews

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

STRENGTHS

Sales

- Have grown business each month since opening
- Sales slipped five years ago but they have been steadily increasing ever since
- Business is increasing due to increased population
- Business has been steady/stable with no major increases or decreases
- Sales have increased due to a combination of population growth and changes to the merchandise and operations of the business
- Sales are less than elsewhere but increasing

Customers

- 30 to 50 year olds, some 18 to 25 years but those customers tend to be very local
- Regional draw
- 18 years and older
- More professionals living in the area and shopping locally
- Growing population
- Small group of very loyal customers but growing list of new residents
- Progressive and growing community
- Customer demographics have shifted from primarily older residents to younger as well as regional visitors
- Waterdown is attracting many families because it is still affordable and close to Aldershot GO Station
- New younger families in the area
- A lot of residents used to live in Burlington or Oakville but have moved west – they are commuters

Rent Affordability

- Pay lower rent than elsewhere in the region

**Atmosphere**

- Love the look of the “Victorian” village

BIA

- Happy about staff changes at the BIA office
- Optimistic about staff changes at the BIA office

Community Minded

- Generally supportive of the community but do not actively take time to involve themselves
- Generally adjacent businesses are supportive of one another and will promote cross shopping to customers
- Good supportive relations with other businesses

Common Downtown Identity

- Even though the business is on Hamilton St., the business described themselves as fully part of Downtown Waterdown

City

- Businesses can take advantage of City incentive programs

Events

- Events neither hurt nor help sales
- Events such as Ribfest help business sales

Traffic

- High vehicular traffic is good for business
- Traffic congestion is good for businesses but bad for the local residents

Farmers' Market

- Farmers' Market creates competition for local businesses but overall it is a good thing for the community

Beautification

- Good work



WEAKNESSES

City

- Zoning and licensing is cumbersome and expensive (\$14,000). City is crippling small businesses even before they open
- City taxes are too high
- City Planning is too late, they should have dealt with the growth much sooner
- City incentive program takes too long
- Some bitter feelings from the past and parking meter installation and removal

Transportation and Infrastructure

- Infrastructure in Waterdown has not kept pace with Waterdown's growth
- Traffic congestion is a nightmare, takes too long to travel through town
- Too many trucks and can be dangerous
- Traffic congestion discourages people from coming to Downtown

Business Community

- Some businesses can be snobby to one another
- New businesses do not feel welcome amongst some of the older businesses
- Not too involved in the business community, doesn't know adjacent businesses
- Does not get involved in the local community, generally independent

Lack of Things to Do

- It is a bit of a "shell" community
- Need more and bigger things to do in Waterdown to attract outside visitors

Events

- Christmas event was a disaster as not all stores that were advertised as being open were open
- Arts Fest was same weekend as nearby Dundas Cactus Festival resulting in thinner crowds

Parking

- Everyone is becoming territorial over their parking and not wanting to share it for the common good of Downtown



BIA

- BIA has been disappointing in the past

New Residents – Lack of Loyalty

- New residents used to live in Burlington and Oakville. They are still commuting and may be more familiar with their former neighbourhoods rather than Waterdown

Identity

- Waterdown has been allowed to grow too quickly and has lost its identity and small town feel

Buildings

- Renovation to Memorial Hall are too modern looking and not in keeping with the heritage

Farmers' Market

- Does not help Downtown, should be re-thought



OPPORTUNITIES

Identity

- While like the Victorian look, merchants feel that Downtown should move on and be more modern
- Arts and cultural hub
- What is Downtown Waterdown – need a brand

BIA

- Be an advocate of the voices in the community
- Help and be a resource for the businesses
- Re-brand the BIA
- Be the voice of unifying the businesses
- Make it easier and more welcoming to new businesses
- BIA should do more surveys with the members to get feedback, BIA needs to get more feedback from the merchants, should meet face to face with businesses to discuss their needs and how BIA can deliver that to them
- BIA should help advocate for lowering business operating costs such as combatting the increasing cost of electricity
- BIA can help recruit businesses
- BIA needs to help bring the businesses together better
- BIA keep up focus on beautification
- BIA focus on educating members

Marketing

- Focus on all the new families moving in to the area
- Increase daytime sales opportunities
- Ideas such as co-op advertising, reworking rules regarding sandwich boards, BIA ads featuring the businesses in the newspaper, etc.
- Focus on bringing in more “new” locals as well as regional draw
- BIA should do more marketing
- Encourage shop local campaigns

New Development

- New development should be charged a levy that goes towards beautifying the Downtown



Business

- See gaps and missing businesses in the marketplace to go after
- If you have the right business, you can do well, depends on how competitive it is
- Increase the night time economy – theatre, banquet centre, motel/hotel
- Time efficiency is the most important, families are looking for home meal replacement, this is the biggest growth segment
- Downtown Waterdown is often a secondary type location for businesses in the region that are already established
- Need more restaurants and food service options
- Want quick, solution oriented products and services for busy lives
- Have a lot of gift giving occasions in their lives (marriages, births, hostess gifts/entertaining, etc.)
- Missing a good bakery
- Downtown needs more retail and less services
- Toy store
- Downtown cannot compete with large format retailers focused on price, Downtown's niche needs to be higher end retail

Events

- Continue to hold events in Memorial Park – it frees up the street and events will not negatively impact businesses
- Rework events to be more business focused
- Have events that attract people
- Events need new life

Buildings

- City and BIA assist to increase efforts to ensure vacant buildings do not fall into disrepair

Parkside Bypass

- May increase sales opportunities for businesses on the north end of Hamilton St. N.



THREATS

Increasing Rents

- High rent and high taxes are causing some businesses to reconsider whether to remain in Downtown Waterdown

Power Centres – Small Scale Retail

- Small scale retail at the nearby power centres



10.0 Summary

Summary of major findings and facts that can be used to guide Downtown Waterdown BIA's future strategic planning sessions and committee work/programs include:

- As many as 17,500 vehicles move through Downtown Waterdown BIA district every day.
- Waterdown has a unique double wave of commuter traffic.
- The majority of visitors to the BIA come from within 5 to 12 kilometres.
- Average visitors are busy, employed, and university-educated with higher household incomes.
- Excluding summer months, traffic increases noticeably on Thursdays, Fridays, and Saturdays. Spring and fall are the busiest times of the year.
- The consumer base includes 20,000 local residents and a daytime workforce of more than 5,500 workers (2,300 in the BIA) - and our market is growing.
- Downtown consumers spend most on sporting events, alcohol, pets and supplies, electronic goods, recreation memberships, packaged travel, children's clothing.
- Downtown Waterdown has a positive economic impact not only in Waterdown but for the City of Hamilton. Downtown Waterdown BIA includes 262 businesses, approx. 500,000 sq. ft. of commercial space. It is a significant economic generator for the City.
- Businesses, property owners and developers continue to invest in Downtown Waterdown and are buoyant about the future retail growth prospects.
- City grants and incentive programs are available to help business and property owners improve properties.



10.1 Comparison to 2009 Findings and Recommendations

The following is a review of successes and issues based on the previous Commercial Market Assessment:

- Increased budget and increased organizational capacity of the BIA.
- Increased partnership with the City especially through the City Councillor but more coordination is encouraged.
- Increased food service experience.
- Improved signage regulations and enforcement.
- City has taken steps to improve transportation issues including the by-pass road.
- There was a suggestion that Downtown Waterdown was a high priority for a Secondary Plan but that has not happened. This would help to create an enhanced Downtown environment for visitors and businesses.
- Specific comparisons to the recommendations in 2009/2010 report include the following:

2009/2010 Recommendations	Status
Increase the budget as per the strategic plan	Completed
Finish the database of members and support businesses and organizations	Completed
Increase partnership opportunities	Completed and ongoing
Increase communication with members through more frequent emails blasts	Completed and ongoing
Prioritize catalysts sites for redevelopment	Not completed
Develop a one page benefit sheet on why a business should want to locate in Downtown Waterdown	Not completed
Give consideration to a proposal to require new businesses to consider Downtown Waterdown first	Not completed, not realistic
Continue to work on bypass and transportation alternatives	Bypass under construction and other changes are being implemented
Continue with street beautification programs	Started and ongoing
Ensure new buildings fit in with character of the Downtown	Started and ongoing
Develop marketing programs that partner with local charities and family oriented events	Yes
Use Downtown as a stage for others to develop their events with minimal assistance from the BIA	Yes and ongoing
Develop joint marketing programs such as a multi-business approach to a senior's day program discount	Not completed
Continue to work with the City on programs that are beneficial to the BIA	Yes, but greater usage of grants and incentives is required



11.0 Downtown Waterdown BIA Vision

Downtown Waterdown BIA has evolved from a smaller community/village to a larger town/city within Hamilton. There have been key seminal moments in that transition including:

- Waterdown attaining a threshold population of 15,000 local residents. This tipping point made local serving retail opportunities more viable.
- Decision to allow larger format stores in the area. This controversial decision encouraged local residents to remain in Waterdown for their shopping needs and not travel to nearby communities thereby diminishing the potential leakage of retail sales out of the community.
- Investment in Downtown including redevelopment of existing businesses but also development of new mixed-use buildings throughout the entire Downtown. The investment has spurred other development investment which creates an economic spin-off effect.
- Increased depth and breadth of retail goods and services continues to evolve from destination oriented businesses to local goods and services including an increase in food services as well as grocery items, specialty food items, and services.

Downtown Waterdown BIA has developed a Strategic Plan in 2016/2017.

The information in this section of the report is meant to complement and add to that plan and not replace it.

The BIA should use this information to enhance their Strategic Plan. Our recommendations should be used to assist the BIA and the City in their own strategic planning moving forward. As a result, these recommendations are suggestions for both the BIA and the City of Hamilton.



11.1 Downtown Waterdown Identity - Workshop Findings

Part of this process is to continue to update and re-enforce Downtown Waterdown's brand identity. This is about differentiating Downtown Waterdown in the minds and wallets of potential consumers.

During the workshop, the following identity elements were discussed:

What does brand/identity mean to you?

- Something that is personal
- Experience based on core values
- Fun, lively, and cheerful
- It is nurturing to a business or BIA
- Locally owned, community oriented
- A consistent and familiar image
- Messages or symbols that are put out to the public
- Edgy
- Evokes an emotion or a memory

Currently on a scale of one to five, how would you score the current Waterdown BIA brand?

- Average score was 3.5.
- All group members felt that the BIA brand was better than it used to be.
- There was agreement from all group members that the Waterdown Village brand should no longer be about being a Victorian village.

To help clarify the brand and identity, participants agreed that the brand/identity should:

- Have a more consistent message
- Be more clearly identified and consistent across different mediums (The image online and the image on the street are different)
- Capture the essence of the village and the Downtown (not Victorian)
- Be more youthful
- Be trendy
- Be edgy



- Build on the history of the village and the Downtown

Participants were asked what are some of the opportunities the BIA should do to strengthen their brand/identity?

- The BIA could increase communication and communicate a more consistent brand.
- Admit that some communication is not engaged with by the business owners and member apathy is part of the problem. Some recognition was given to the fact that business owners are not always listening.
- More social media please!
- The BIA could do a bit more to support the individual businesses
- The BIA has been doing a much better job in the last 6 months
- Search for increased opportunities for facilitating partnerships (advertising)
- Create co-op advertising opportunities
- Communicate the value of the BIA and answer the question: What is the BIA?

Finally, when creating a consistent brand/identity platform, the participants developed a list of places where the BIA brand lives. This could serve as a checklist that could be utilized by the board to capitalize on the Brand opportunities.

- BIA website
- Gateway signage
- BIA office storefront
- Board members are an extension of the brand and should all be on the same page
- Events/festivals
- Advertising – traditional, print, radio, etc.
- Social media
- Street banners
- BIA videos
- BIA print material: invoices, business cards, letter head, etc.
- Farmers' Market
- Media stories, public relations campaigns, news articles
- City of Hamilton – staff, website, economic development, relationships/partnerships
- Other partners – Chamber of Commerce, residents' associations, trail associations, library, schools, etc.



At the workshop with BIA participants, the following suggestions were also made to build loyalty, increase business opportunities for the Downtown businesses through attracting new residents to visit and shop.

Experiential Marketing / Promotions

- Differentiate and build on the 'experience' – create hooks to get people to visit and experience the Village. The BIA businesses need to focus on delivering a customer experience that visitors cannot get at big box centers, power centres, and malls. This includes personal, friendly, one-on-one service, get to know your customers by name and habits). It is the engagement combined with the experience that will drive loyalty.
- Drive traffic through promotions that create excitement and incentive to visit (Week's Ladies' Night as an example)
- Promotions, ideas that promote the pedestrian experience and cross shopping opportunities

Media / Advertising

- Reach newcomers through social media – help BIA members grow their social media marketing skills and work collectively to grow BIA audience. E.g., use common hashtags.
- Use a multi-platform approach. Many businesses have a 'niche' customer base but not a one size fits all solution. There needs to be a combination of print, digital, social media to reach various stakeholders.
- Encourage members to keep their digital presence current (websites, social media, google listings, etc.)
- Reach young families where their kids are active (media, resources, places they go to watch, sports scores, recital pictures, Burlington, etc.)
- BIA to negotiate a Flamborough Review BIA member discount on print advertising or negotiate a bulk buy (monthly business card sized ads) Seek cooperative advertising opportunities.

Word of Mouth – Business to Business

- BIA-wide collaborative approach to promote area businesses and make recommendations
- More cross-promotions that build support for each other's businesses (Village Theatre partner with restaurants, lifestyle & fitness partner with complementary businesses – 'While you wait' discounts – local café near activity centres)
- Capitalize on destination businesses – those businesses that draw from outside of Waterdown (i.e. Waterdown Goldsmith, Bicycle Works, Leylands, True North, etc.) to drive visits to other BIA businesses
- Word of mouth starts with business owners. Hold quarterly 'Meet Your Neighbour' walking tours (by sector) where members can tour the neighbourhood and learn about BIA businesses.
- BIA employee discount programs at BIA businesses

**Transit/Commuter Traffic**

- The BIA may consider advertising in commuter area (take out full ads throughout Aldershot GO Transit Station for an entire week twice a year (Spring and Fall))

Flamborough versus Waterdown

- When marketing Downtown Waterdown outside of the core built up area, Downtown Waterdown should take a leadership role in terms of positioning the Downtown as synonymous with the community (Waterdown is Downtown and Downtown is Waterdown).
- For Waterdown residents the focus should be more on becoming acquainted with the unique businesses and owners in the Downtown.

Get to Know Downtown Waterdown Merchants

- The BIA should bring to life the unique personalities of each of the Downtown businesses and use it in various print, video, digital campaigns. Highlighting what makes of each business in unique and interesting poses and develop a short bio on each business and/or owner. This type of project may be subject to additional grants for funding.



In terms of retail and commercial development in Downtown Waterdown BIA, the following were acknowledged by workshop participants as their wish list. The list includes two main business types:

- Fun, recreation based, interesting, experience-based, stress relieving type retailers
- Errand-based, practical, work/life balance type retailers

Overwhelmingly, all participants noted parking supply and management as key issues with any retail development

Fun, Recreation Based, Interesting, Experience, and Stress Relieving Type Retailers

- Retail, food services that is open after 6 pm
- Restaurants that cater to larger groups, brew pub
- Restaurants that cater to more intimate settings, wine bar, smaller cafes
- Patios
- Increased night life
- Events and retailer events – music, art, sports and recreation (hike and yoga)
- Movie theatre
- Recreation oriented businesses, Goodlife Fitness
- Book store (traditional books or specialized) with café

Errand-based, Practical, Work/Life Balance Type Retailers

- Men's clothing, tailored, customized, excellent customer services (e.g., Westbrooke, Ancaster) as well as casual men's clothing
- Shoes, footwear
- Children's clothing and toys in mid to high price range
- Indoor kids play area
- Gift oriented retail
- Drive through car wash

Note that some businesses such as fitness, bookstores, and children's play areas are a combination of both fun and practical. More retailers need to be able to change their business model throughout the day or week. A grocery store can be very practical and efficient during the day but in the evenings, they can offer music, entertainment, movies, socializing etc. Similarly, a café can be very efficient during the morning rush commute but in the afternoon, can cater to business professionals in a quiet work environment, and then on weekday evenings can offer a games night.



12.0 Downtown Waterdown 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. As stated, they are labelled as recommendations, but they are suggestions for the BIA and the City to work towards. They are not meant as strict recommendations that the BIA nor the City of Hamilton will be held accountable for.

Each action item includes the following elements:

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

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

- Organization/governance
- Economic development
- Physical improvements including parking, streetscaping, beautification, etc.
- Marketing including both customer focused marketing and investor attraction marketing components



12.1 Organization

Goals

- Continue with good work in governance, staff structure, committees, etc.
- Work to increase membership participation
- Engage Municipal staff, Councillors, and leaders on issues of importance to Waterdown
- Create partnerships with stakeholders to achieve greater impact

MID TERM				
Specific	Measurable	Actionable	Responsibility	Time Frame
Increased partnerships	<ul style="list-style-type: none"> • BIA should coordinate and/or work with more groups/ organizations that are of mutual benefit to the Downtown businesses (e.g., arts, education, Chamber of Commerce, etc.) • A goal for the next five years may be to increase the groups the BIA actively coordinates with to 8 groups 	<ul style="list-style-type: none"> • Either sit on their boards or receive their postings or send posts to their groups • Could include everything from Chamber of Commerce, area developer association NAIOP – commercial real estate developers' association, momstown Burlington, residents' associations • Can use the Farmers' Market or other ways to achieve greater cooperation and coordination (see suggestions for marketing partnerships) 	BIA and partner groups	<ul style="list-style-type: none"> • After a year from now, begin to add a partnership group every year and assess how and when BIA should interact with them – e.g., attend annual conference, post on their blogs, get publicity in newsletters, etc. • BIA should be willing to remove themselves from groups that are not providing mutual benefit



Partnership with Municipality	<ul style="list-style-type: none"> Continue good working relationship with City, BIA Advisory Committee, and area Councillor 	<ul style="list-style-type: none"> Develop a plan for mutual benefit that includes development, public realm development, potential Secondary Plan for the Downtown, parking, bypass route, trail development, commercial development in Downtown and elsewhere in the area, enforcement of small retail unit clause at Clappison's Corner, etc. 	BIA and City departments	<ul style="list-style-type: none"> Approximately a year from now, BIA should begin to actively expand its coordination efforts with other City departments
Develop social media policy	<ul style="list-style-type: none"> Completed policy 	<ul style="list-style-type: none"> Determine when and how you should be replying to social media that affects the BIA and members 	BIA	<ul style="list-style-type: none"> Develop by 18 months
Develop a BIA purchasing policy	<ul style="list-style-type: none"> Completed policy 	<ul style="list-style-type: none"> Rules and procedures for accountable purchasing protocols 	BIA	<ul style="list-style-type: none"> By next AGM
Develop a code of conduct for BIA and member interaction	<ul style="list-style-type: none"> Completed policy 	<ul style="list-style-type: none"> Send out to all members and review at the AGM 	BIA	<ul style="list-style-type: none"> Develop by 2 years from now
Begin to develop succession planning for BIA board and businesses	<ul style="list-style-type: none"> Smooth transition of business ownership 	<ul style="list-style-type: none"> Determine which businesses are for sale or up for retirement and reach out 	BIA	<ul style="list-style-type: none"> 3 years from now



12.2 Economic Development

As Waterdown and Downtown Waterdown continue to grow, the need to create a comprehensive and diverse Downtown offering becomes ever more pressing. The small village will no longer suffice to serve the needs of a diverse and growing community.

The Downtown needs:

- Increased number of public plazas, social gathering spaces, and a public realm experience that works to build community and increase retail sales opportunities (i.e., through increased dwell time opportunities).
- More mixed use development that includes consideration for parking.
- Increased separation of ground level retail and professional services including encouraging services to locate on upper levels and some side streets.
- Connectivity between Hamilton Street and Dundas St. E. through the use of retail mix, public realm, and building typology.

The following examples and recommendations are not meant to bind the BIA nor the City of Hamilton to these exact programs and policies. In some instances, they are meant to be inspirational or even aspirational. It is understood that it is unlikely that the City of Hamilton will purchase property in Downtown Waterdown but ideas of these projects should be encouraged.

Example

As an example, Downtown Stouffville has several key public realm and development initiatives that Downtown Waterdown could aspire to. As stated, this example is just one case. It does not mean that the BIA and the City of Hamilton should be held accountable for producing this exact same type of development or public realm space.



Up to five storey mixed-use development in Downtown Stouffville produces needed new residents who can walk to businesses creating built-in demand



Investment in community assets that could include arts and theatre space, post-secondary learning institutions, etc. combined with social public space along the main street is important to the health and vitality of the community



Wide sidewalks, social gathering spaces, patios, and seating that all work in combination to create great social gathering that assists retail sales development



Public park space in the middle of Downtown for community events, people watching and creating a pause moment in the Downtown experience

Public Realm

As stated, investment in mixed-use developments and an enhanced public realm that supports both people gathering, people movement, and business development opportunities should be part of every development proposal that comes forward in Downtown Waterdown. All projects should include an element review that assesses how more can be accomplished in less space. There is a need for public plazas along both Dundas St. E. and Hamilton St. These can be privately owned park spaces. As stated, the BIA at the beginning should just be made aware of these developments and year after year, the BIA should take on a more advocate role encouraging better development that benefits Downtown pedestrian movements. In the future, the BIA would advocate and then potentially in the longer term (within three to five years) would begin to facilitate these position through the planning process.

Mixed-use developments should be encouraged that include retail on the ground level, opportunities for professional offices on upper levels or side streets, and parking locating behind the building or included within the structure.

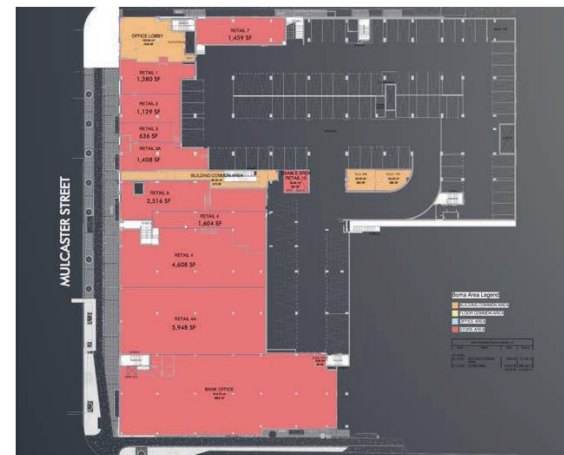
The following examples illustrate some of these key concepts.



Mixed-use buildings that develop varied vertical interest, merchandise outside, planters, sandwich boards, bicycle racks, tree canopy, overhangs, lighting, signage,



Note the placement of the signage. Also note that the bulk of the residential tower does not sit over the retail area thereby freeing up the ground level space with fewer columns





Collier Centre, Barrie – Mixed use retail, office, and residential with parking on ground and upper levels





Recommendations – Economic Development

MID-TERM				
Specific Task	Measurement	Actionable	Responsibility	Time Frame
Market incentive programs such as CPIG, loans, grants, kitchen exhaust, etc. to members	<ul style="list-style-type: none"> Monitor usage of grant and loan programs, get feedback from businesses on pros and cons of the program 	<ul style="list-style-type: none"> Have City staff illustrate the effectiveness of the incentive and grant programs Learn how the grant programs work, including application process, funding, etc. Monitor proposed changes to the vacancy rebate program for impact on the BIA, members, etc. and obtain feedback 	BIA working with City staff in Urban Renewal	<ul style="list-style-type: none"> Monitor every year
Develop a realistic wish list of commercial businesses Ensure ideal business mix stays within the parameters set out as per the Downtown Waterdown vision and to ensure a healthy mix of complementary businesses (no one business category should dominate over the others)	<ul style="list-style-type: none"> Retail merchandise increase from 12% to 15% (currently 10%) Food service increase to 12% (currently 8%) Lower vacancy to under 4% (currently 9%) Encourage services on upper levels and side streets 	<ul style="list-style-type: none"> Create a wish list based on desired business types (see workshop results) that includes increasing ground level accessible spaces for retail and food services 	BIA	<ul style="list-style-type: none"> Monitor every year



LONG-TERM				
Specific Task	Measurement	Actionable	Responsibility	Time Frame
Meet with developers and brokers to familiarize BIA with basic indicators as a means of increasing learning for BIA staff and board – such as ground floor rent, ROI, loading area sizes, height and density, parking	<ul style="list-style-type: none"> Basic information on rents, parking requirements, etc should become part of the BIA vocabulary 	<ul style="list-style-type: none"> Set up learning meetings with brokers and developers Create case studies for development 	BIA to work with City Councillor and City staff	<ul style="list-style-type: none"> 2 years from now
Participate in development process and advocate on behalf of the BIA for better development that benefits the BIA	<ul style="list-style-type: none"> Increased public plaza space, better retail development on the ground level, increased cross shopping 	<ul style="list-style-type: none"> Work collaboratively with the City Councillor and City staff departments BIA should refer to City staff when inquiries are received BIA should be aware when development applications are received by the City that are of interest to the members (at appropriate time in the process) 	BIA coordinating with City Councillor and City staff	<ul style="list-style-type: none"> 3 years from now (or longer)
Agree to minimum standards for ground level and second level retail	<ul style="list-style-type: none"> Chart comparing and adding to key design standards 	<ul style="list-style-type: none"> Compare to C5 zoning and determine whether additional changes need to be added (see next section on Planning Review) 	BIA to work with City staff	<ul style="list-style-type: none"> 3 to 5 years from now



12.3 Physical Improvements

The City of Hamilton should consider the need for a Downtown Waterdown Secondary Plan that includes consideration for the public realm and retail connectivity along with transportation and parking for this fast-growing community.

Parking Management

There is continued free parking in Downtown Waterdown. However, Hamilton Parking is assessing the requirements for increased technology for monitoring parking rules. While Downtown Waterdown does not have paid parking, they can avail themselves of these changes to create increased permitting programs, enforcement of time limits in efforts to free up on-street parking for customers and force workers (long-term stays) to other lots further away.

Enhanced and Animated Ground Level Experience – Patios and Privately Owned Park Spaces (POPS)

It is acknowledged that there is very little publicly owned property in Downtown Waterdown and it is unlikely that the City of Hamilton will purchase more property for public space. However, development should encourage more patio space and public gathering spaces.

The City of Hamilton's patio report was recently submitted for review and approved. Increasingly Downtown Waterdown businesses are dependent on food services from a wide range of different target markets. The potential reduction of traffic on Dundas St. E. will create an amenable area for patios. However, the side streets may be better suited at present. While there may only a very few spaces for these parking related patios that could be in Downtown Waterdown, there should be a program put in place for the longer term that encourages patio space development in a variety of forms and formats.

For new mixed-use developments, building set-backs should be encouraged to allow for patio spaces. The patios should be made of high quality materials and have a sense of permanence (may be required to remove them in the winter).

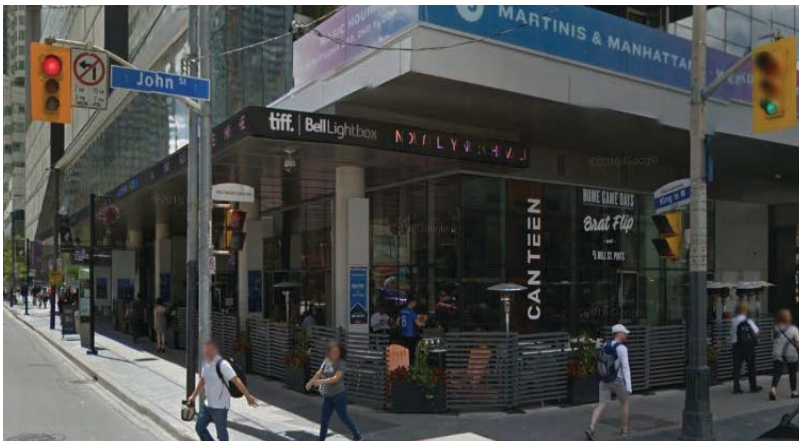


Attention to detail for the patio that creates a seamless environment from the inside to the outside

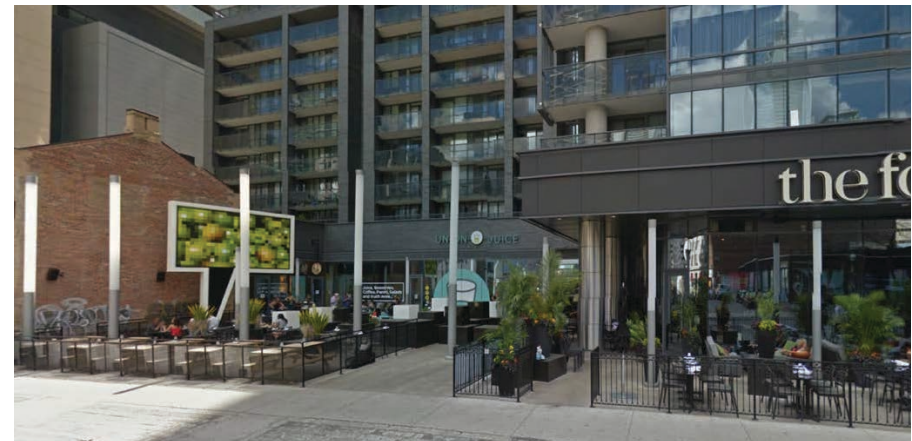


The ground level is set back from the lot line to create additional space for the patio

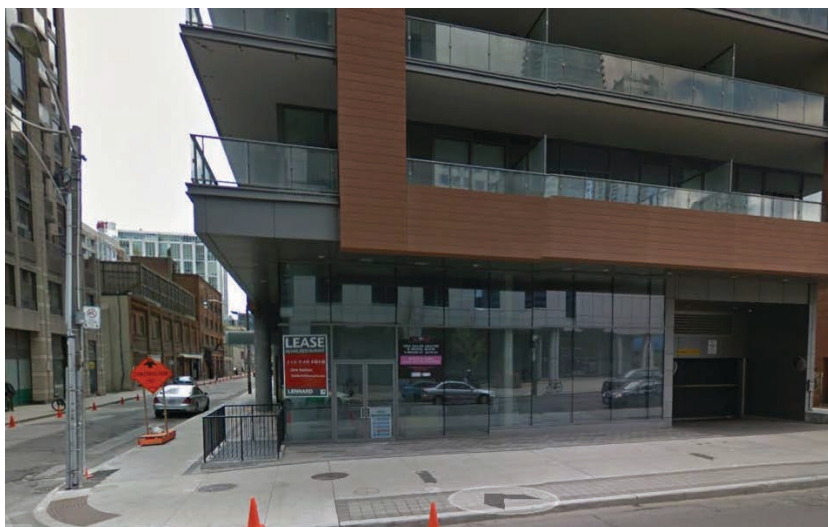
In addition, Privately Owned Park Spaces (POPS) should be encouraged in new development applications to add more public realm space.



The ground level is set back from the lot line to accommodate the patio for the restaurant



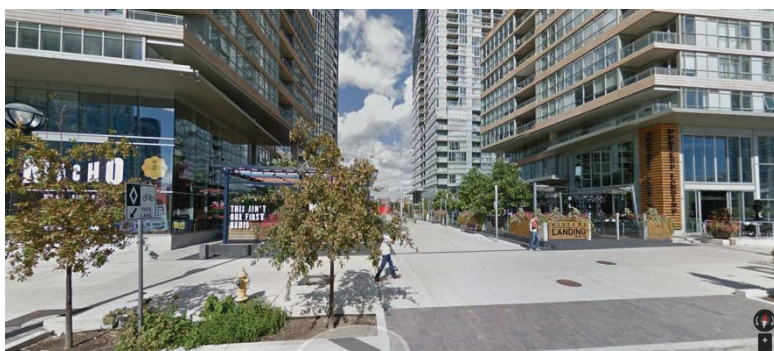
A patio space is carved out of the development to create a combination of public realm (Privately Owned Park – POP) and private patio space



The ground floor is set back to allow for small patio space



A section of the development is set back at the corner to allow for a patio space to develop



The ground level retail is set to enhance the patio experience



In Downtown Kitchener, the streetscape is set up for the sidewalk to be used either for patio or for on-street parking

Other Patios

The City of Hamilton should work with the BIA to create animated pop up patios and spaces.



Can be more sculptural yet also encourage community building and conversation



Can make use of shipping containers for unique people gathering places

- The BIA could test pilot a pop up patio to illustrate how it would work and encourage social gathering.

Public Realm

As stated, the BIA has no control over the development or pace of development of public gathering space. In addition, there is very little publicly owned space in the Downtown and it is unlikely that the City will purchase more space for such type of development. However, aspirational development should include a program to attempt to develop more public realm gathering space that may be part of privately owned public space.

There should be a minimum of four major public realm public gathering spaces located approximately 400 m apart from one another.





12.4 Marketing SWOT

This SWOT is based on reviewing Downtown Waterdown's current marketing activities including the brand identity, website, social media channels, advertising vehicles, events, promotions etc.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Unique area in which to differentiate yourself from others• Active on all social media channels• Good video• Decent business directory on website• Robust BIA budget (\$200K)	<ul style="list-style-type: none">• Two conflicting taglines, <i>"You Can Have It All."</i> and <i>"Explore, Experience and be Enchanted."</i>• Difficult to understand target audience prioritization, particularly on the website• Outdated look and feel on the website and hard to read• Mix of real photography and stock photography
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Capturing your differentiation and taking the brand to a new level of expression	<ul style="list-style-type: none">• Other neighbouring Hamilton BIA's that are well defined and more sophisticated in their brand identity and marketing initiatives



12.5 Marketing – Website and Social Media Review

- **Domain:** www.waterdownbia.ca
- Domain was registered Monday June 16, 2003
- Domain expires Friday, June 16, 2017

Evaluation

The website was reviewed under the following criteria headings:

- Purpose
- Content
- Design
- Authorship

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

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

Purpose

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

Content

- ☒ The content is easy to read and understandable.
- ☒ There is an outline of topics provided allowing users to find topics and move among them easily – The score of 2 was due to the navigation within the site that is cumbersome.

①

②

③

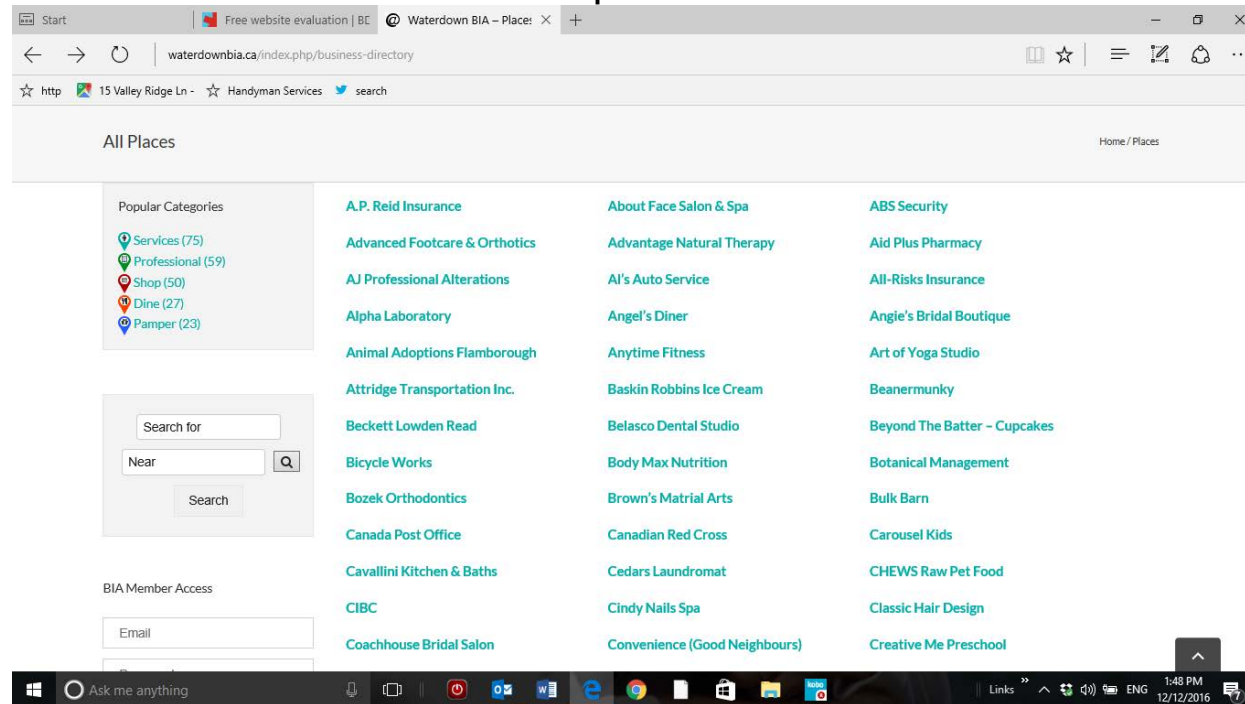
④

⑤



- ☑ The spelling and grammar is always correct
- ☑ The information is current and accurate - It is favourable that 2017 event dates are already posted on the site. Many of the tabs in the members' section are not being utilized. Property/Leasing tab is not populated.
- ☑ There are many links to information on the topic provided and most are working:

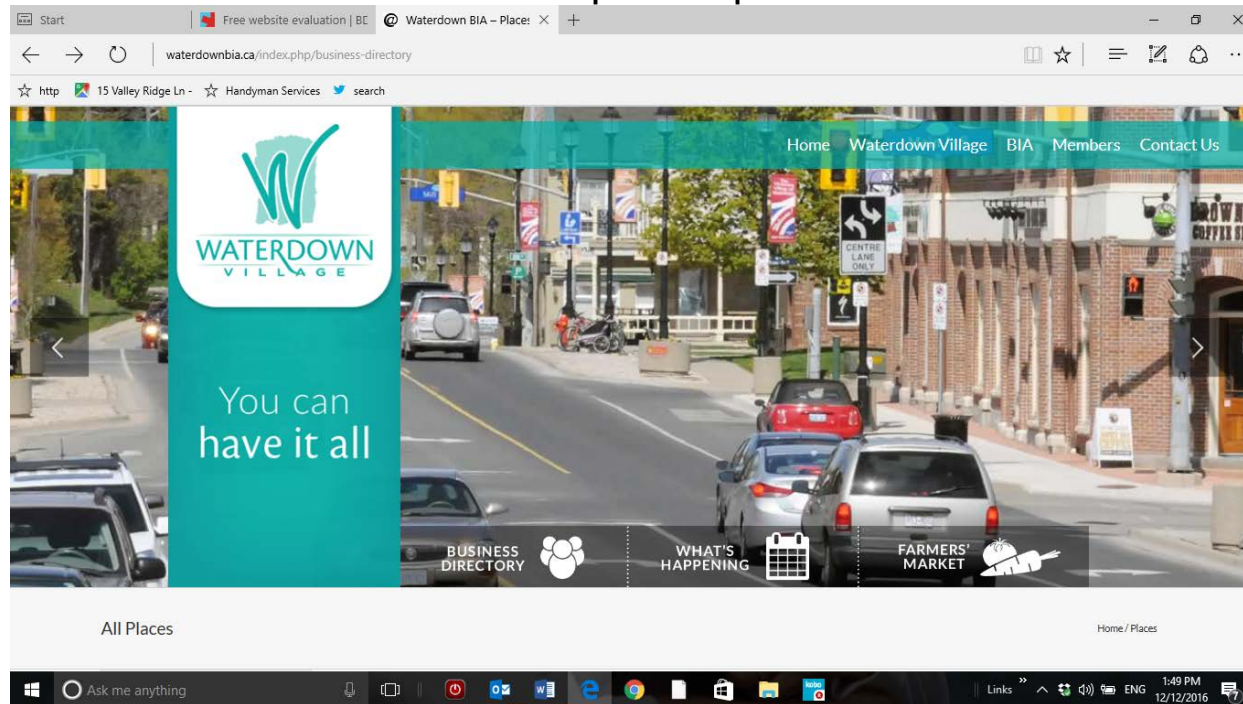
Downtown Waterdown BIA Website Example of Links



- ☑ Graphics are relevant and appropriate to the topic - The graphics used on the site are various and the style of them is not consistent.



Downtown Waterdown BIA Website Example of Graphics



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

Design

- ☒ The information is easy to use and find - See notes on cumbersome navigation.
- ☒ The text is easy to read and not cluttered.
- ☒ The site design is appealing to the intended audience.
- ☒ The links pages are well organized and appealing.
- ☒ The website loads quickly - The site is slow to load on some platforms.



- ☑ This website is optimized for printing.
- ☑ The website is mobile friendly and easily navigates by mobile phone.

Authorship

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

AODA Compliance

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

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

Findings

- The Waterdown BIA has made some good investment in their website.
- Their website has become a good tool and is effective and current and could be more effective with some easy navigational changes.
- Observation: The Waterdown BIA brand has been diluted. The Brand is not consistent between what we see on the BIA website and the 'historical village' brand presented in the Waterdown streetscape.

Other Findings

Facebook

Waterdown BIA

548 Likes

Waterdown BIA is using this medium regularly and fairly effectively.

Twitter

@WaterdownBIA

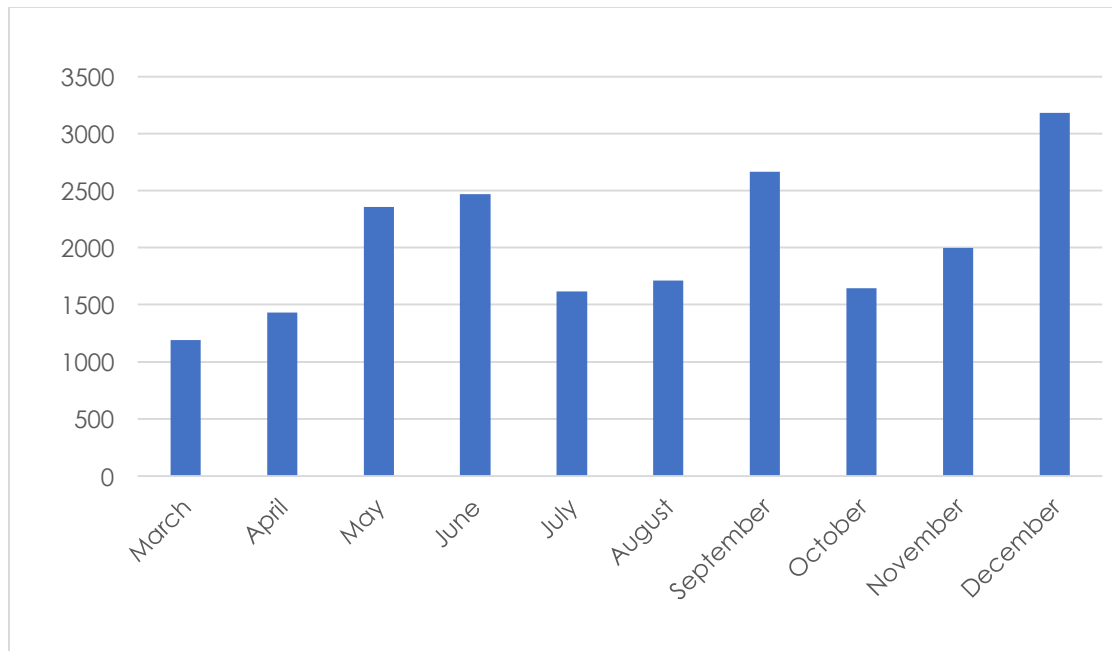
242 followers

Waterdown BIA is using this medium regularly and fairly effectively but the twitter following is relatively low.

Google Website Analytics

Preface: The website analytics are only available beginning March 2016. The evaluation below is for the period from March 1, 2016 to December 31, 2016.

Downtown Waterdown BIA Website Unique Visitors by Month 2016



Findings

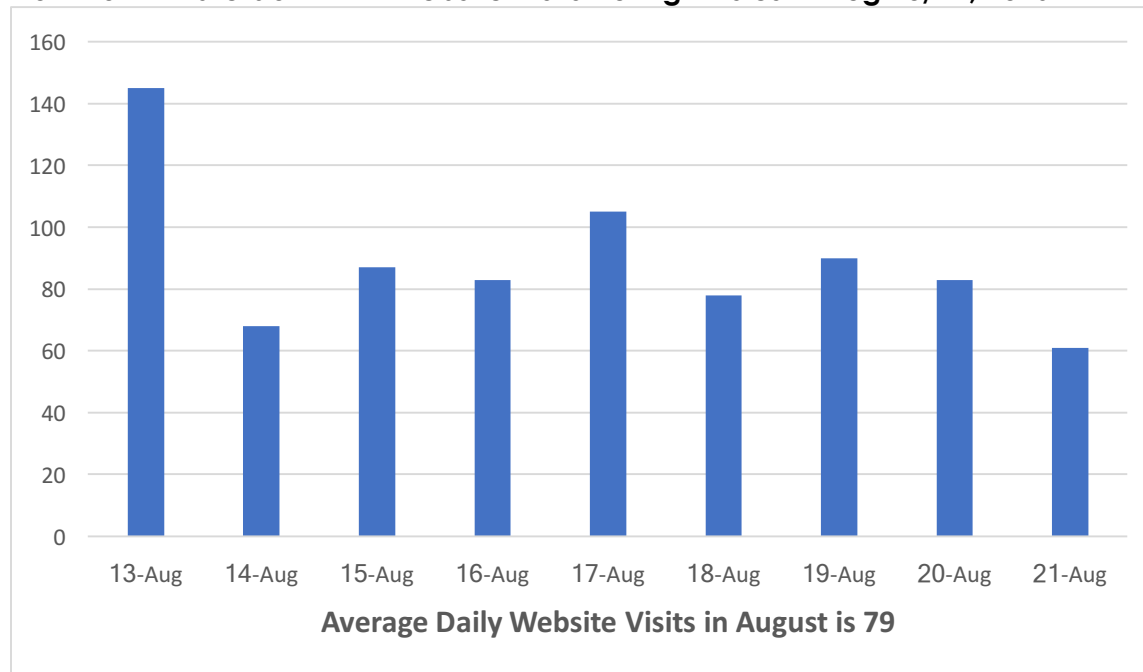
- The data for unique visits by month clearly shows patterns in website visitors that indicate a general trend in accelerated interest in the Downtown Waterdown BIA website during late spring, early fall and the month of December.
- During the ten-month period indicated, there were 4,162 total visits to the website. This is an average of 1.3 visits per visitor. As a result, users are returning to the website for further content.
- 83% of visitors to the website are visiting for less than 30 seconds.
- External links can be highly valuable in generating website traffic from other sources. In this case, Facebook is the most used external link bringing visitors to the BIA website. While the number is not high (20), it is the most utilized. Tourism Hamilton and OBIAA are also generating website leads.
- The highest keyword search from an internet browser is 'waterdown'. It is important to ensure a wide variety of keyword and key phrase searches on installed in the background of the website.



Events Website Traffic

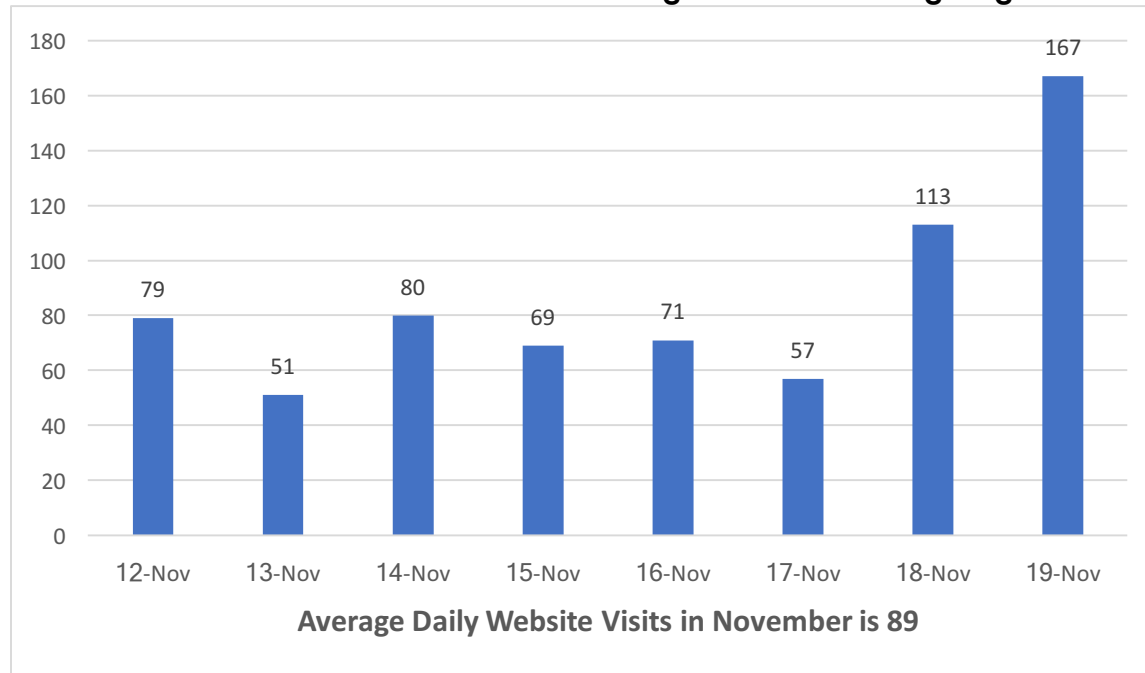
An assessment of the Downtown Waterdown BIA website traffic before and after events was conducted to determine if there was an increase in visits to the website preceding events or during the events themselves. The following charts indicate our findings:

Downtown Waterdown BIA Website Visits During Artsfest – Aug 13/21, 2016





Downtown Waterdown BIA Website Visits During Christmas Tree Lighting – November 19, 2016





Social Media

A review of food service ranking sites such as Yelp reveal the following top rankings for food service operations in Waterdown.

Yelp – Top 10 in Downtown Waterdown BIA

Coffee		Lunch		Dinner	
1	Copper Kettle	1	Copper Kettle	1	Marciano's
		4	Watermark	2	Watermark
		5	Royal Coachman	3	Copper Kettle
		7	Turtle Jacks	4	Lord Byron
		8	Angel's Diner	5	American House
		9	Pizzaville	6	Turtle Jacks
		10	American House	8	Royal Coachman



12.6 Marketing Recommendations

These recommendations are intended to give Downtown Waterdown BIA a high-level Point of View on things to consider as they develop their next strategic plan and marketing plan. It is recommended that Downtown Waterdown BIA use the SMART system noted in the appendix to ensure that your planned activities are **specific + measureable + achievable + realistic + targeted**.

BASICS – now	SHORT TERM – 1 year
<ul style="list-style-type: none">• Brand Blueprint exercise• Choose one tagline to add to all communication media• Target Audience prioritization exercise including large employers located near the BIA• Review your draft marketing plan and re-prioritize tactics to ensure that you aren't trying to accomplish too much – be realistic	<ul style="list-style-type: none">• Review and re-allocate the marketing budget• Update the current website – clean it up, add photography, update content, manage it monthly• Stronger profile of the Business community – who they are, what they offer, how they are unique• Evaluate your social media channels and determine what resources you must support them do they are maintained and up to date
MID-TERM – 2/3 years	LONG TERM – 5 years
<ul style="list-style-type: none">• Logo re-design – move away from an identity that looks and sounds like a shopping centre• Create a Brand Style Guide• Website re-design	<ul style="list-style-type: none">• Streetscape marketing plan

These exercises are located in the appendix.



13.0 Planning Context – Downtown Waterdown BIA.

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, and
- the lot sizes and dimensions, parking requirements, building heights, setbacks from the street and other such regulations.

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

13.2 Official Plan

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

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



It is intended that the predominant built form be mid-rise and low rise buildings. It is desired that the proportion of multi-storey mixed use buildings with commercial uses at grade be increased; however single use commercial and residential buildings are permitted. Single use office buildings with more than 10,000 square metres are not permitted.

The designation's design policies strongly encourage a compact urban form with a streetscape and building arrangement that supports pedestrian use and creates "vibrant people places". To strengthen the pedestrian focus in areas where it does not currently exist, infill development will be required in a physical arrangement that supports a vibrant and active sidewalk environment (4.6.19). Buildings are to be located close to the street with no parking, drive-throughs or stacking lanes between the building and the sidewalk. 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 streetline provided they are lined with smaller stores, multiple entrances or other similar means to animate the streetscape (4.6.21). In areas that don't have a secondary plan (which is the case for Downtown Waterdown 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).

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

It is noted that additional Pedestrian Predominant Streets may be designated in Secondary Plans. As is described below, the associated zoning designation (C5a) is used in the Downtown Waterdown BIA although a Secondary Plan has not been done for this area.

Implications for BIAs

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



13.3 Zoning By-law

A current Zoning By-law Review is modifying the zoning by-law designations for the BIA along with all other non-Downtown Hamilton BIA districts. Public consultation has been completed, and staff anticipate bringing forward the recommended By-law amendments for Council's approval later in 2017.

Zoning designations of interest to Downtown Waterdown BIA are:

- (a) The Mixed Use Medium Density (C5) Zone: This is the proposed zoning for Hamilton Street within the Downtown Waterdown BIA.

Section 10.5.1 and 2 of the By-law list the permitted and prohibited uses – generally the full range of commercial, residential and institutional uses except for motor vehicle dealerships. The maximum height is 6 storeys. The maximum building setback is 4.5 metres.

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

This is the proposed zoning for the Downtown Waterdown BIA including the Dundas Street frontage plus the flanking sidestreet frontages on Mill Street, Main Street and Flamborough Street immediately north and south of Dundas.

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

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



- Beverage making establishments, catering, commercial entertainment and recreation, financial establishments, microbreweries and repair services are only permitted on the first storey of buildings.
- Commercial parking facilities are only permitted if wholly contained within a building and are not permitted on the first storey.
- As noted, there are property-by-property exemptions that apply across the entire City for a range of goods and service uses.

Implications for BIA

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



13.4 On Street Patio Program

Staff recommendations to approve a “permanent on-street patio program” were considered and approved by City Council on March 8, 2017. This follows up on a Pilot Program implemented in 2016.

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

Implications for BIA

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



14.0 Trends

Omni-channel

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

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

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

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

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

Smaller Retail Formats

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



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

Buy Low Buy High

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

Food Shopping Throughout the Week

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

Mobile

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

Sold Retail Principles Still are Key

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

Leadership is King

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



Demographics is Destiny

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

Technology Driven Innovation

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

- Sensor based technology
- Big data
- Online

Sensor Based Technology

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

Big Data

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

Online

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



APPENDIX



Appendix: BIA Marketing Planning - CHECKLIST

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



BIA Marketing Planning - GUIDELINES

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



	<ul style="list-style-type: none"> For each strategy note the tactic + budget + timing + resources + success measurement
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BIA Marketing Plan - CHECKLIST

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

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



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



Waterdown Business Improvement Area - 2017 Strategic

Vision

To be a vibrant, diversified village with strong connections to our quaint origins, where businesses, property owners and visitors can thrive.

Mission

Work collaboratively with all stakeholders to promote and sustain beautification and economic development within the Waterdown BIA district.

Culture / Values

- Work together
- Think and act inclusively
- Be open and transparent
- Innovate

Strategies

Enhance Aesthetic Appeal of Village (Beautification)

Create cohesive streetscape 'look' throughout BIA district

Develop and implement new banner program that reflects Village branding and minimizes need for seasonal changes

Maintain and expand holiday and seasonal décor in Village

Strengthen Village Vibrancy (Promotions)

Execute quarterly BIA-wide business/ retail promotions (spring, summer, fall & holiday)

Build reach and impact of Farmers' Market

Evaluate/execute movie events

Host annual Christmas Tree Lighting

Develop and execute Taste of Waterdown or restaurant-focused event

Promote Shop Local & Drive Traffic (Marketing)

Execute targeted print campaign

Enhance BIA website to be more robust tool for users & businesses

Build digital presence

Produce 5 minute 'calling card' video to promote BIA

Develop targeted campaign for new and out-of-core residents

Support community-building through 3rd-party sponsorships

Implement BIA office window merchandising program

Increase Member Engagement

Establish steering committees (Beautification, Events, Marketing, Farmers' Market, Member Outreach)

Deliver regular communication to members

Host learning workshops to help strengthen member businesses

Host BIA social networking event

Empower future



Waterdown Business Improvement Area - 2017 Strategic

STRATEGY: Enhance Aesthetic Appeal (Beautification)

BUDGET: \$ 60,000

TACTICS:

Create cohesive streetscape 'look' throughout BIA district

- RFP to local landscapers/nurseries to standardize and simplify streetscaping efforts
- Include spring/summer, fall and holiday plantings (beds & planters)
- Ensure drought tolerance and maintenance are considered in plant selections
- Re-evaluate Waterdown Blooms program

Develop and implement new banner program

- Update to reflect Waterdown Village branding
- New Farmers' Market branding
- Create designs that minimize the need for seasonal changes

Maintain and expand holiday and seasonal décor in the Village

- Re-install (& store) 38 LED snowflakes on Dundas & Hamilton Streets
- Re-evaluate/re-install pre-lit trees & other Village lighting
- Add 8 snowflakes or lighting on Main and Mill Street if feasible
- Explore Expanded Village Lighting Incentives (Volume discounts, rebates)
- Layer business window decorating initiatives tied to promotions/seasons



Waterdown Business Improvement Area - 2017 Strategic

STRATEGY: Strengthen Village Vibrancy (Promotions)

BUDGET: \$34,000

TACTICS:

Execute quarterly BIA-wide business/retail promotions (spring, summer, fall & holiday) with goal to drive sustained traffic to business area and increase member involvement.

- Extend and/or promote opening hours
- Offer 'best deals of the season' – couponing, incentives, flash sales
- Attract consumers with ballots for Shopping Spree prize
- Include curated pop-up markets, themed business window decorating initiatives, entertainment or other 'experiential' marketing elements where appropriate
- Encourage restaurant and other business participation

Potential themes:

'Sample' the BIA (Simple ideas for promoting and sampling across categories - retail, health & wellness, dining, art, culture, etc.

Happy Birthday Canada - 150 Best Deals

Fall Treat Days and/or Culture Days

Holiday Promotion

Build reach and impact of Farmers' Market (end of May to mid-October)

- Increase vendor participation & consumer attendance
- Host monthly engagement programs – Canada 150 celebration
- Develop hooks to drive visitors to other BIA businesses
- Implement re-branding



Waterdown Business Improvement Area - 2017 Strategic

STRATEGY: Strengthen Village Vibrancy (Promotions)

BUDGET: \$34,000

TACTICS:

Evaluate/Execute 'Movies Under the Stars' events

- Movies, family activities, restaurant involvement (dinner & a movie), fitness 'stretch' activities
- Explore rotating movie locations (Memorial, Sobey's Plaza) to drive foot traffic to business area and increase member involvement

Host annual Christmas Tree Lighting (November 18)

- Family entertainment and activities (Memorial Park)
- Engage more businesses
- Develop hooks to drive visitors to BIA businesses post event

Taste of Waterdown / restaurant promotion (timing tbd)

- Execute prix fixed menu, or themed promotion to drive traffic and trial at restaurants (*potential to tie in with quarterly, themed business/retail promotions*)

Align Canada 150 celebration elements to some of these promotions where it makes sense **



Waterdown Business Improvement Area - 2017 Strategic

STRATEGY: Promote Shop Local & Drive Traffic

BUDGET: \$ 26,000

TACTICS:

Execute targeted media campaign

- Raise BIA visibility, promote promotions & shop local/'Spend it Here' content through monthly Flamborough Review print campaign and digital push down ads
- Create ad templates to present consistent, professional branding

Enhance BIA website to be more robust tool for users and businesses

- Include monthly feature story / business profile and videos on home page – keep it fresh
- Update business directory and site images
- Train businesses to manage their own page
- Build Member Resources Pages

Build digital presence

- Sustain ongoing social media posts
- Launch 2-month social media 'Discover Waterdown BIA' campaign

Execute targeted campaign to new and out of core residents

- Establish real estate, developer and welcome wagon partnerships / initiatives to gain followers and provide incentives to visit the core
- Create 'Introductory offer' program

Edit/produce 5 minute BIA calling card video

Support community-building through 3rd party sponsorships / festivals

Implement BIA office window merchandising program



Waterdown Business Improvement Area - 2017 Strategic

STRATEGY: Increase Member Engagement

BUDGET: \$5,000

TACTICS:

Establish steering committees (Beautification, Promotions, Marketing, Farmers' Market)

- Involve members in planning process and decision making through establishment of steering committees
- Strengthen succession planning

Deliver regular communications to members

- Quarterly BIA Village newsletter
- Bi-weekly BIA Member News
- Update and maintain distribution lists

Host learning workshops to help strengthen member businesses

(@ the BIA office, 4 to 6 sessions in 2017)

- Survey members in January on desired topics
- Capitalize on City and local resources for knowledge building / keynote speakers
- Topics could include – growing your business (grants), social media marketing, legal, basic bookkeeping, improve your bottom line, manage operating costs (hydro,) starter company and youth mentorships/summer program.

Host BIA social networking event

Empower future entrepreneurs – Youth Mentoring Program