



King Street West BIA
Commercial Market Assessment

July 2017

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1.0 Introduction

Three Sixty Collective was retained by the City of Hamilton (City) to undertake a Commercial Market Assessment of King St. W. Business Improvement Area (BIA). The background study process includes a thorough review of the demand and supply characteristics of the BIA resulting in a strengths, weaknesses, opportunities, and threats market assessment.

The process included:

- Commercial audit of businesses in the BIA
- Competitive positioning
- Key person interviews with businesses, stakeholders, and City staff and Councillors
- Visitor origin data from license plate survey of on-street parking
- Pass-by traffic data from license plate survey of traffic flowing through King St. W.
- Intercept survey of people on King St. W.
- Trade area review
- Review of development applications, building permits, and investment in the BIA properties
- Summary of incentives and grants
- Strengths, weaknesses, opportunities, and threats summary

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.





2.0 Visitors to King St. W. BIA

To begin to understand the commercial market opportunities in King St. W. BIA, a review of visitor movement and origin data was undertaken. This included six major reviews:

- Vehicular and pedestrian movements along King St. W.
- Traffic origin data from a survey of vehicular traffic moving along King St. W.
- BIA visitor origin data from a survey of on-street parking license plates
- Pedestrian intersection volumes and movements
- Observational data
- Key person interviews with retailers

2.1 Vehicular and Pedestrian Movement Along King St. W. BIA

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

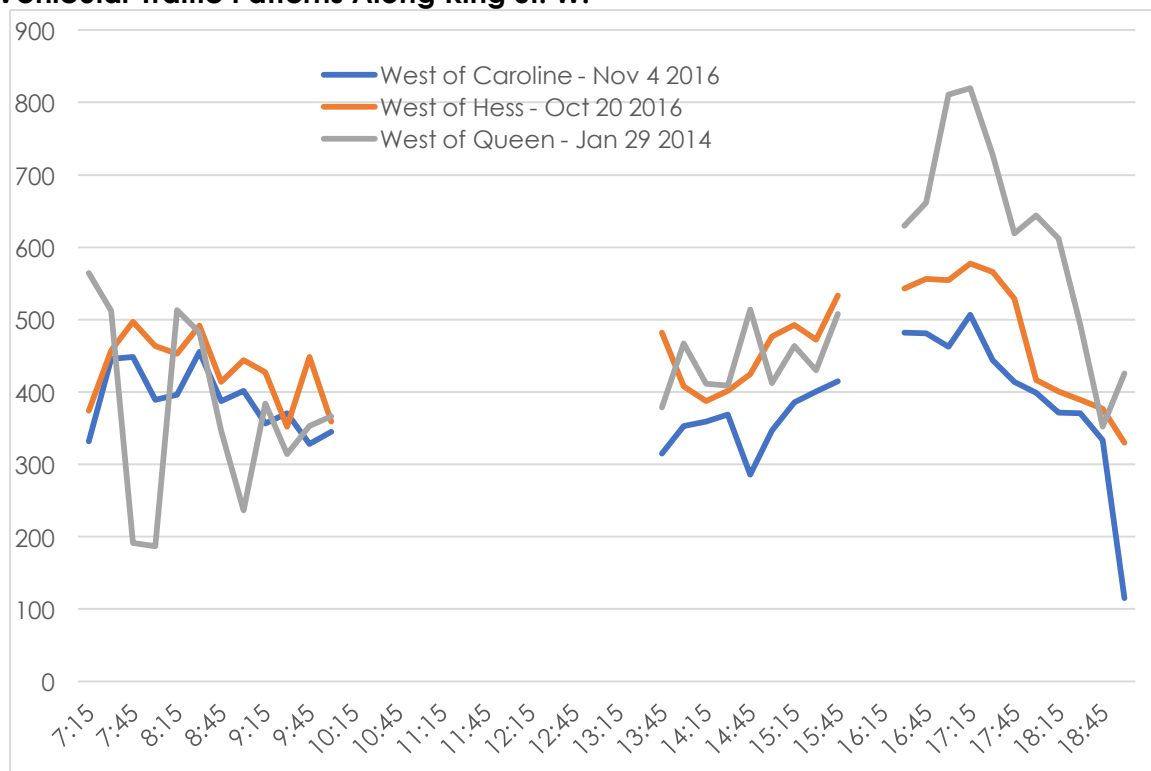
Intersection	Date	8-hour Vehicular Count	8-Hour Pedestrian Count
King St. W. and Caroline St.	Fri. Nov. 4 2016	14,739	2,129
King St. W. and Hess St. S.	Thur. Oct. 20 2016	16,199	826
King St. W. and Queen St. S.	Wed. Jan. 29 2014	20,939	666

Source: City of Hamilton

*Note that no traffic measurements were taken during the period that the rapid bus lanes were in effect.

Focusing on movement directly on King St. W. the following graph illustrates vehicular traffic throughout the day at three major points along King St. W.

Vehicular Traffic Patterns Along King St. W.



Source: City of Hamilton

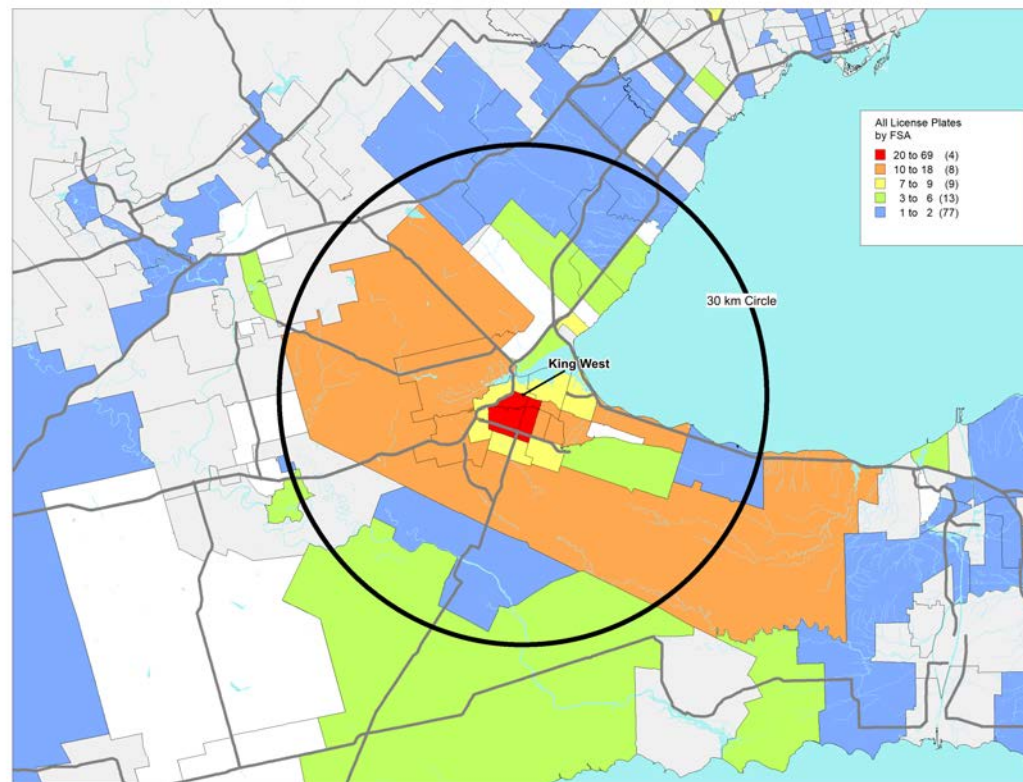
Findings for King St. W.

- A moderately high volume of traffic moves along King St. W. throughout the day and then spikes during the late afternoon and evening commute.
- During most of the day, traffic fluctuates between 350 to 450 vehicles per 15-minute interval (1,400 to 1,800/hour)
- There are spikes in the traffic flow during the morning, noon, and evening commutes whereby there are large volumes of traffic passing by and then very little traffic.
- Traffic tends to build along the BIA especially after the connection with Queen St. S.
- Traffic falls off significantly after 7:00 pm.

2.2 Survey of Vehicular Traffic on King St. W.

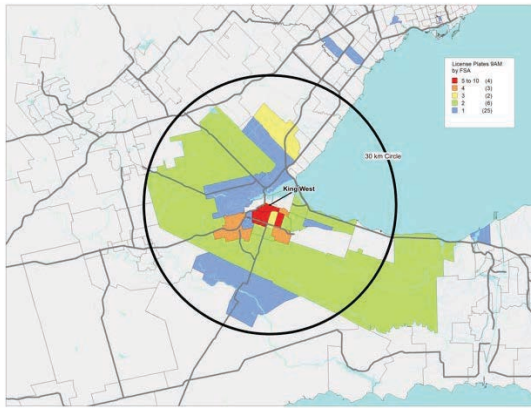
A survey (sample) of vehicles travelling along King St. W. in November 2016 illustrates a sample of postal code data of registered vehicle owners' addresses and a reflection of vehicular origin type data. It is important to note that not all vehicles may have been driven directly from the location of the vehicle registration address or that the driver is the owner of the vehicle.

Sample of King St. W. Vehicular Traffic Corresponding Postal Code of License Plate – Total 9 am to 3 pm November 2016

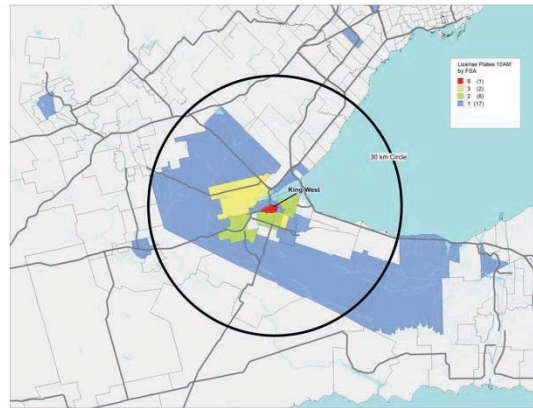


Source: 360 Collective – red colours indicate more vehicles were registered to addresses in these postal code areas and blue colours indicate that only one or two vehicles were registered to vehicles in those postal code areas.

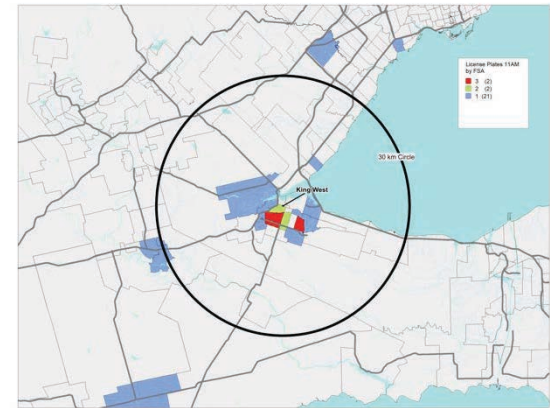
Sample of King St. W. Vehicular Traffic Corresponding Postal Code of License Plate – Hourly Review



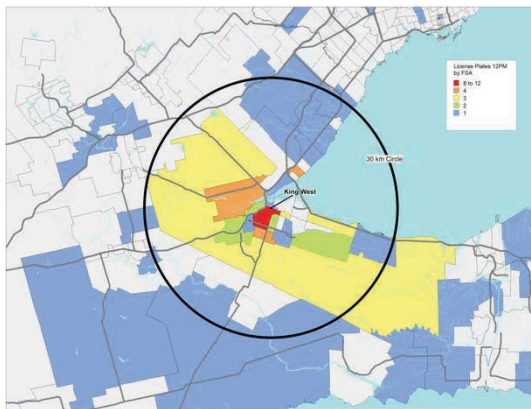
9 am to 10 am



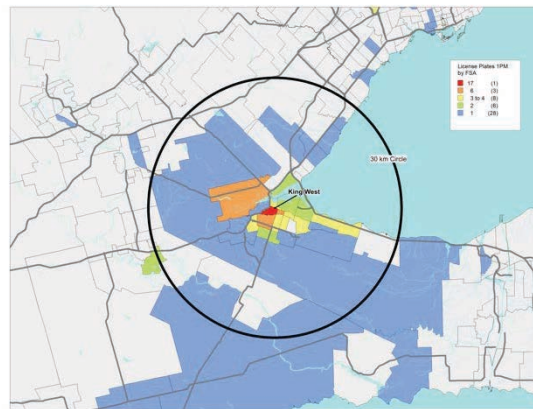
10 am to 11 am



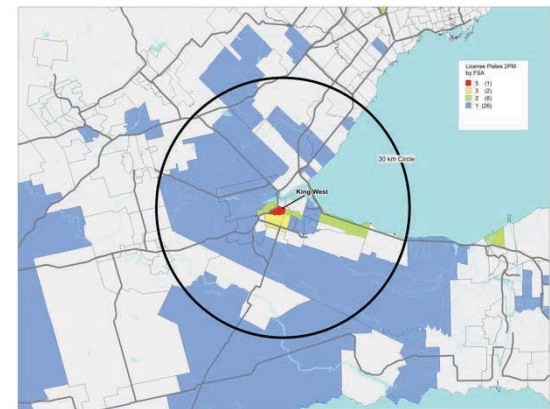
11 am to 12 pm (noon)



12 pm (noon) to 1 pm



1 pm to 2 pm



2 pm to 3 pm

Source: 360 Collective- red colours indicate more vehicles were registered to addresses in these postal code areas and blue colours indicate that only one or two vehicles were registered to vehicles in those postal code areas.



Findings for King St. W.

- There is a concentration of vehicular traffic through the BIA that is local to the west Downtown/Lower City area. The series of one-way streets and limited access points to the Lower City/Downtown and to the Mountain often requires use of King St. W. as a circulation point.
- Beyond local traffic patterns, regional traffic comes from concentric circles surrounding King St. W. and is not necessarily skewed to any one specific region.
- Travel distances are very wide and extend to Burlington, Milton Cambridge/Woodstock, Toronto, Grimsby/St. Catharines, Caledon, and other Niagara Region areas.
- There is a noticeable concentration of traffic from Upper Hamilton (mountain area) through King St. W. due to Queen St. S. mountain access.
- There are the three regional spikes during the day (morning, noon, and late afternoon); during other periods, traffic is primarily local.

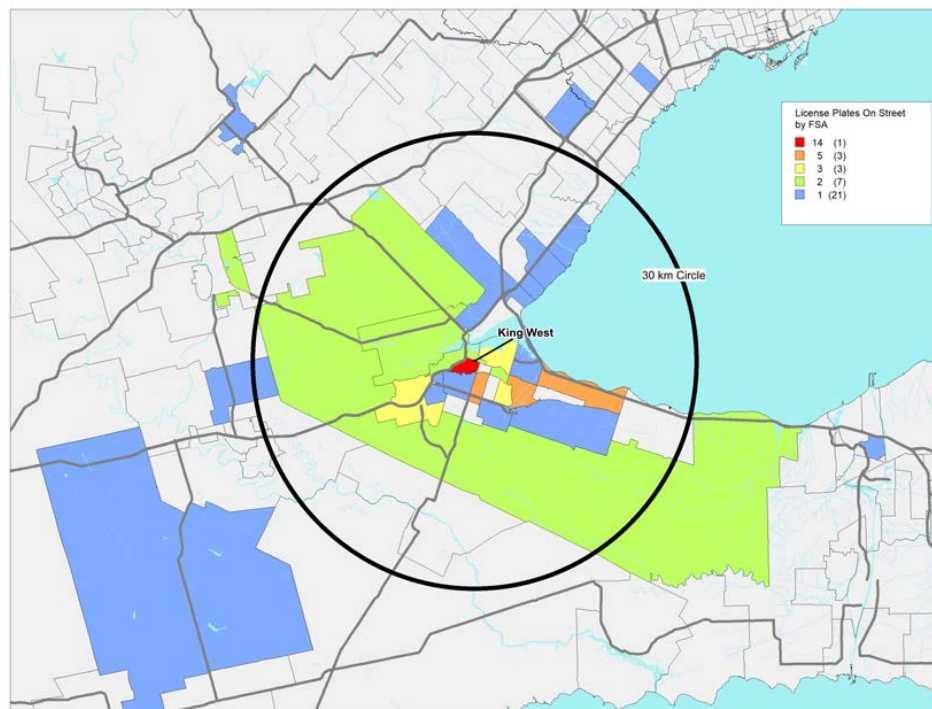
Implications for King St. W. BIA

- King St. W. is a highly accessible and convenient place that connects many parts of the region.
- The current road pattern network often necessitates vehicles to travel along a portion of King St. W. to get to where they need to go in the City.
- Retail along King St. W. has benefitted from both local serving and regional serving attributes.

2.3 On-Street Parking Visitation to King St. W. BIA

During November, license plate data for the on-street parked vehicles was collected as one component of determining the visitor trade area and draw/reach for the commercial businesses in the BIA.

On-Street Parking License Plate Survey – November 2016



Source: 360 Collective– red colours indicate more vehicles were registered to addresses in these postal code areas and blue colours indicate that only one or two vehicles were registered to vehicles in those postal code areas.

Findings

- Local residents tend to visit by vehicle. However, King St. W. businesses do draw from a wide geographic range.
- The average dwell time from on-street parking visitors is 33.9 minutes.
- Approximately 0.5% of vehicular traffic along King St. W. stops and parks within the BIA area.



Parking Meter Revenue

Year	Number of On-Street Meters	Total Parking Revenue	Revenue Per Meter
2009	16	\$18,196.74	\$1,137.30
2010	16	\$17,870.55	\$1,116.91
2011	16	\$16,729.22	\$1,045.58
2012	16	\$20,929.70	\$1,308.11
2013*	16	\$16,452.16	\$1,028.26
2014*	18	\$7,812.46	\$434.03
2015*	18	\$12,226.86	\$679.27

Source: City of Hamilton

* Note that from October 2013 to February 2015, the parking meters were moved from the north side of the street to the south side and a bus rapid transit lane was put in on the north side.

Findings

- The change in parking meter rate in 2010 from \$0.50 to \$1.00 did not affect visitation. Prior to 2010, visitors were probably over paying for the amount of time they actually stayed in the area.
- Parking is important to the current businesses on King St. W. and their successful operations.
- The installation of the rapid bus lanes and shift in parking to the south side of the street had a negative effect on visitation to the local businesses.



Parking Utilization – 9:00 am to 4:00 pm November 2016

Time	Parking Utilization of 18 On-Street Spaces
9:00	16.7%
9:30	22.2%
10:00	27.8%
10:30	44.4%
11:00	38.9%
11:30	38.9%
12:00	72.2%
12:30	77.8%
1:00	72.8%
1:30	55.6%
2:00	77.8%
2:30	72.2%
3:00	44.4%
3:30	33.3%
4:00	38.9%

Source: 360 Collective

Findings

- Parking utilization peaks during the day from noon to 2:30 pm (no counts were done in the evening).

Implications for King St. W. BIA

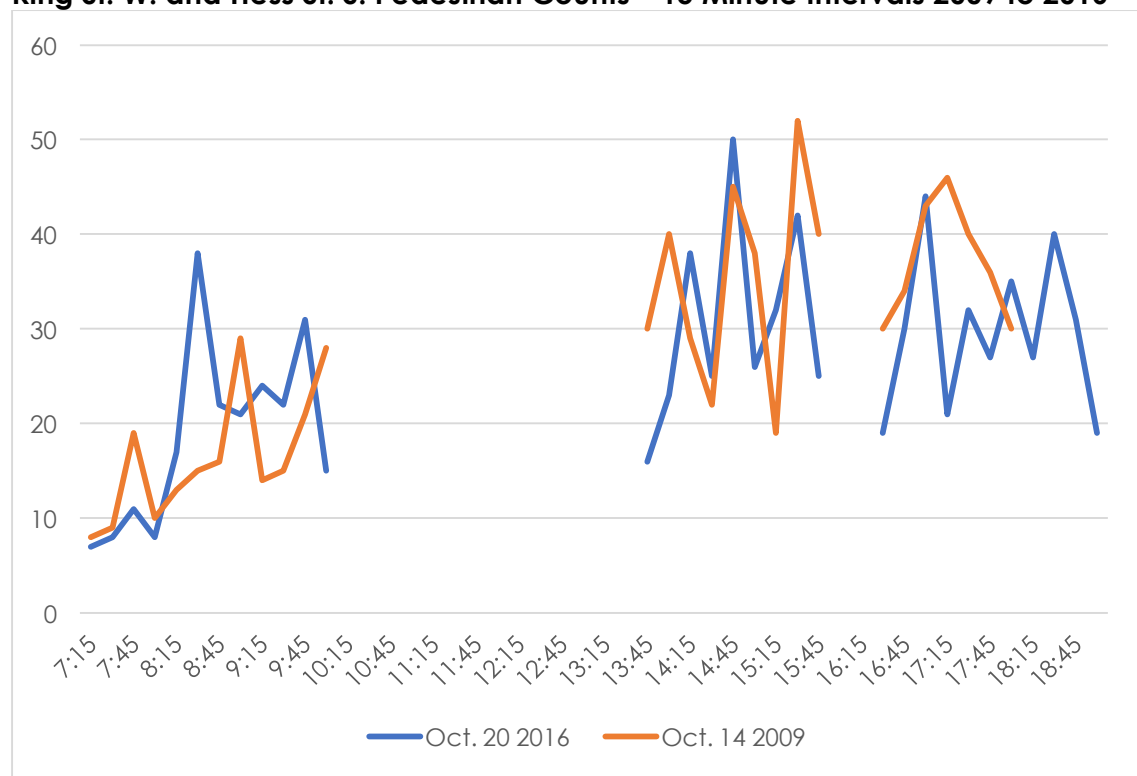
- While local area residents use the on-street parking for convenience, on-street parking serves a regional visitation need.
- Parking utilization during the peak year of 2012 was good but averages \$4.06 per day (based on 46 weeks accounting for free parking during Nov/Dec). There are opportunities for increased parking utilization.

2.4 Pedestrian Traffic

Average pedestrian traffic at the major intersections varies along King St. W. BIA from low to high. Pedestrian volume is relatively high closer to Downtown at King St. W. and Caroline St. S. (also it is a major transit stop). Pedestrian volumes fall the further away from Downtown.

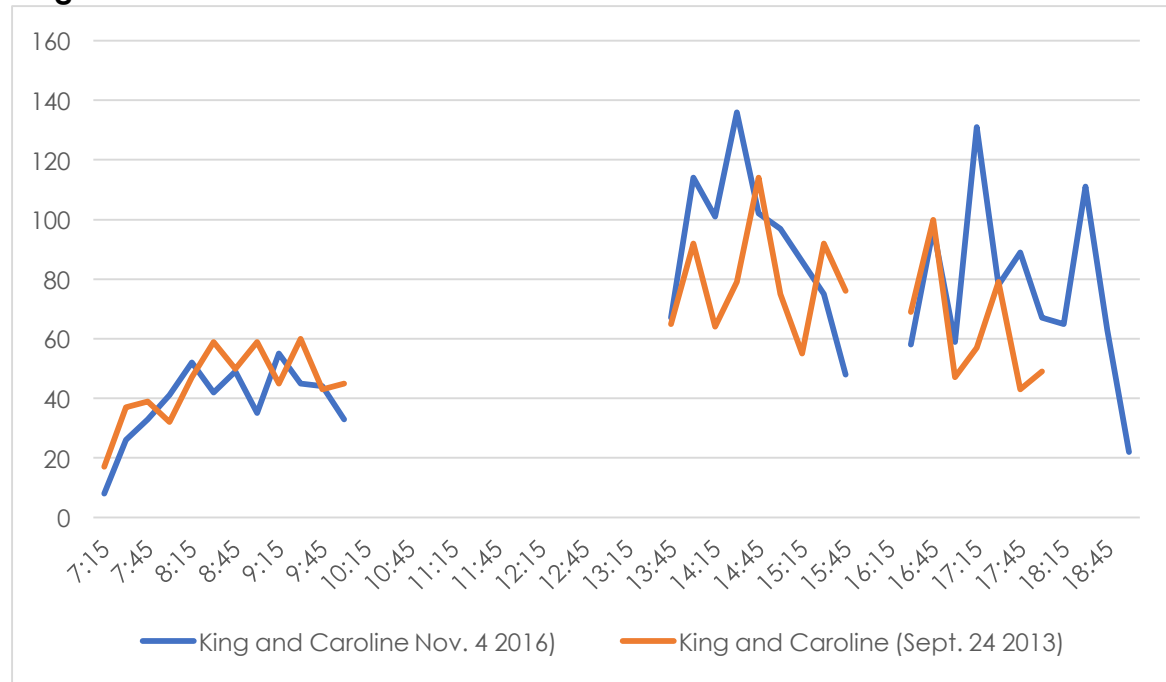
Comparing past and present pedestrian counts reveals the following changes in flow patterns for two key intersections.

King St. W. and Hess St. S. Pedestrian Counts – 15 Minute Intervals 2009 to 2016



Source: City of Hamilton

King St. W. and Caroline St. S. Pedestrian Counts – 15 Minute Intervals 2013 to 2016



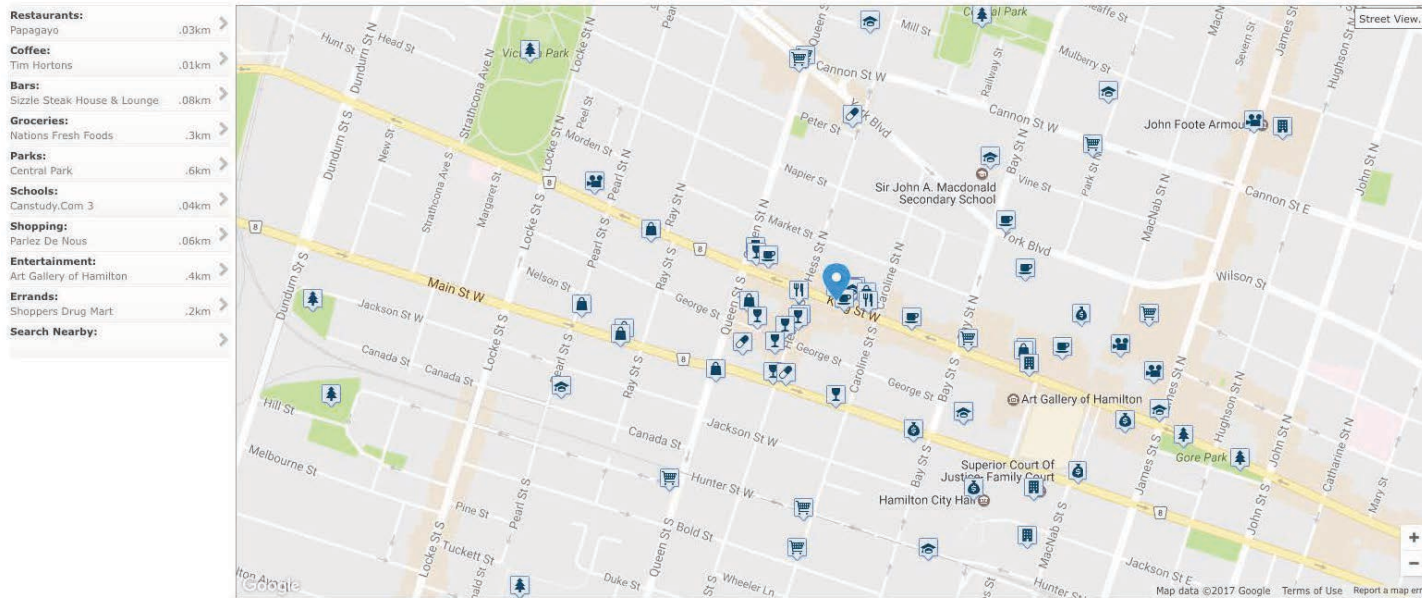
Source: City of Hamilton

Findings

- The pedestrian flow at King St. W. and Hess St. S. in 2009 is very similar to the flow in 2016. Also, there is a similar flow at King St. W. and Caroline St. S. in 2013 compared to 2016. There are similar spikes during the morning commute and early afternoon commute. There is an extension of pedestrian traffic during the early evening from Downtown and as the restaurants begin to fill up.
- The sharp peaks and valleys of traffic are partially related to transit usage.
- The address 246 King St. W. has a Walk Score of 97 and a Transit Score of 83. Both are very high and reflect the accessibility of the King St. W. area to nearby goods, services, and amenities.

King St. W. Walk Score – Nearby Amenities

What's Nearby



Implications for King St. W. BIA

- Businesses have to be nimble and adjust operations to take advantage of the pedestrian flow spikes and valleys throughout the day.
- In 2016, there is not enough local residential density to support a significant amount of neighbourhood serving retail but that is quickly changing as more residential is completed.
- There is increased opportunity in the late afternoon as Downtown commuters are returning home from work (walking home or walking to their parked vehicles located nearby).
- There is an opportunity for some early morning retail sales opportunity but only for hot beverages and very quick breakfasts/snacks.
- Overall, as stated, businesses need to be nimble to adjust to the hourly change in the pedestrian traffic and how to satisfy their needs.



3.0 Trade Area Analysis

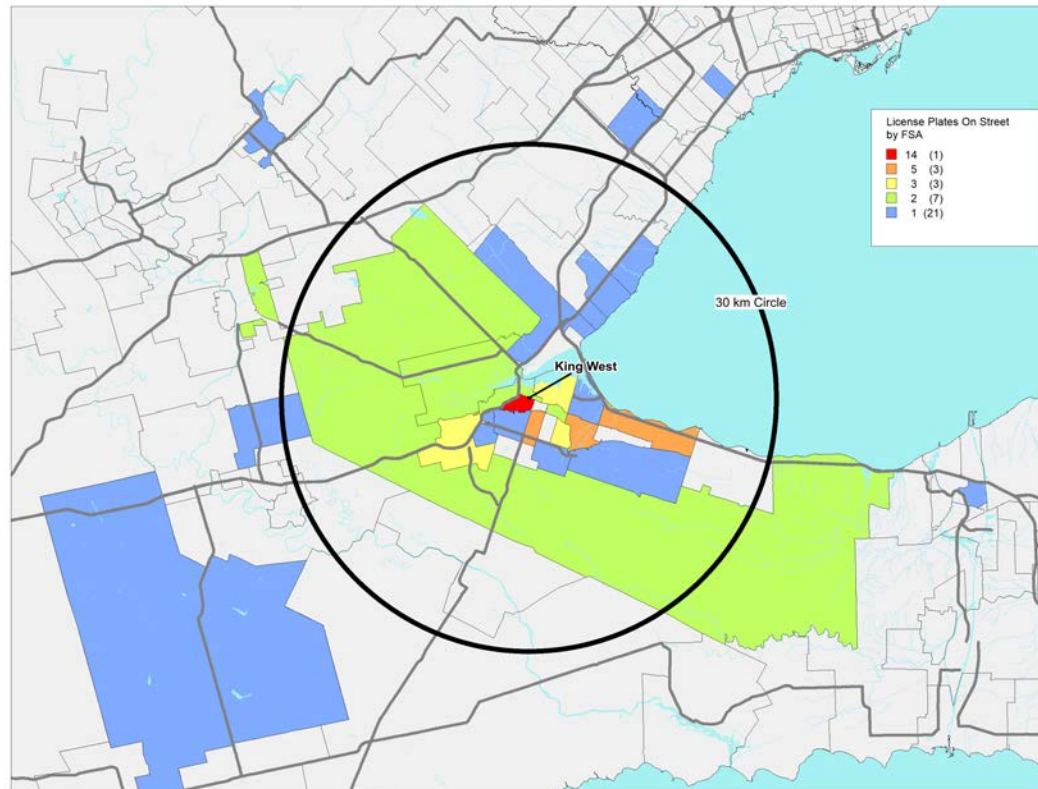
The trade area analysis is affected by three data collection methods:

- License plate data from on-street parking only (excludes private parking lots)- noted already reviewed in Section 2.0.
- Intercept survey postal code data and results.
- Cell phone data 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.

3.1 On-Street Parking Visitors

The postal code data, Forward Sortation Area (FSA), of the on-street parked vehicles was gathered in November 2016.

Postal Codes Corresponding to On-Street Parking Visitors 9 am to 3 pm – November 2016



Source: 360 Collective— red colours indicate more vehicles were registered to addresses in these postal code areas and blue colours indicate that only one or two vehicles were registered to vehicles in those postal code areas.



Findings

- On-street parking was primarily used by local area residents in the west end of the Lower City.
- However, there is a regional draw of King St. W. businesses from further away.

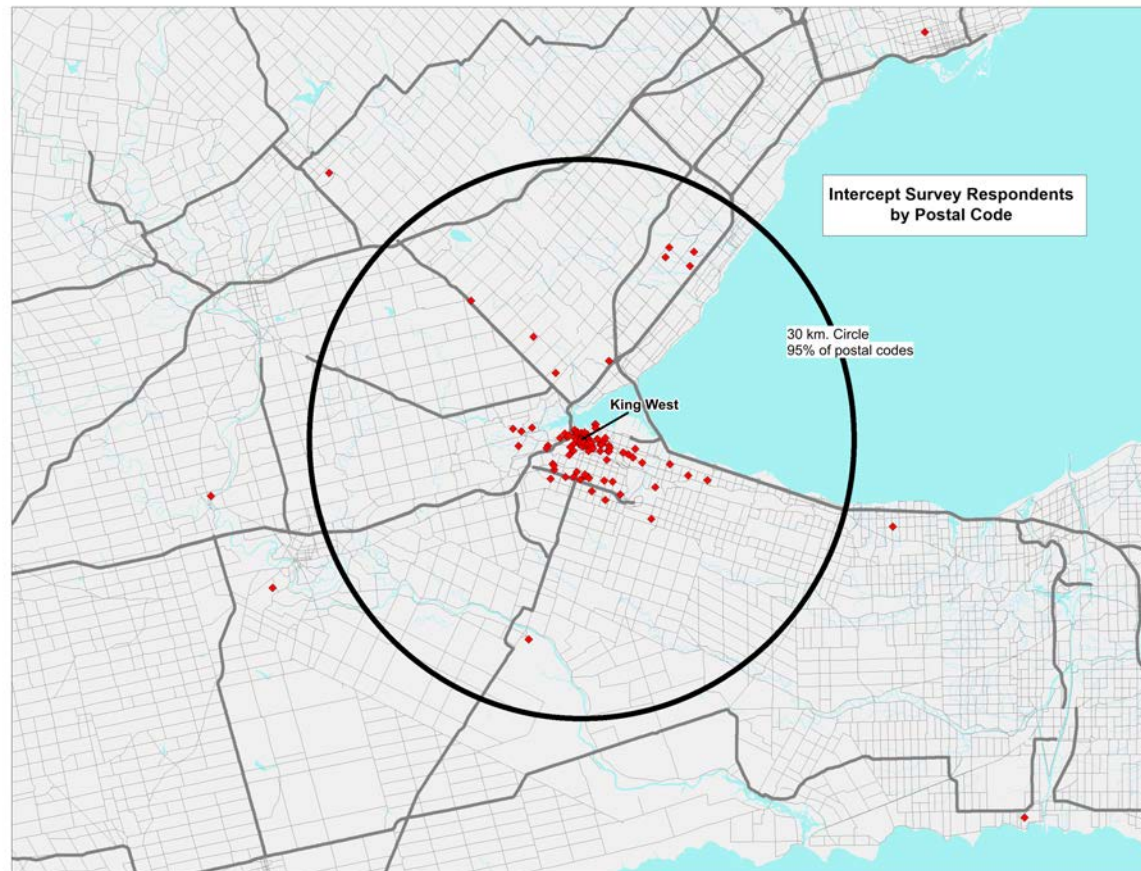
3.2 Intercept Survey Findings

During October/November 2016, 240 intercept surveys were completed on King St. W. in the public domain of the BIA.

Respondents were chosen randomly Monday to Saturday from 10 am to 5:00 pm. The surveys recognize that early evening and late evening visitors were excluded but it was felt that few respondents would stop on the reverse commute home, there was to be no surveying after dusk for safety reasons.

Intercept respondents were from all over the Greater Golden Horseshoe (Toronto, Burlington, Guelph, Brantford, Caledon, St. Catharines, Fort Erie). However, the majority were concentrated in the Lower City west of Downtown Hamilton.

Intercept Survey Respondents Home Postal Code



Source: 360 Collective, Page by Page Consulting



The following tables highlight key findings of the intercept survey respondents.

How did you arrive in this area today?

Method of Travel to King St. W. BIA	% of Total
Walk	57.8%
Drove, passenger in vehicle	18.5%
Public transit	16.5%
Bike	3.2%
Other	0.8%
Don't know, refused	3.2%

Findings

- Most people on the street arrived at the area on foot. This included those who parked in Downtown for work and walked to the area for lunch, coffee, or strolling, etc.

Visitation Frequency to King St. W.

Number of Times	% of Total
Daily	48.2%
Five times a week or more	6.9%
One to two times per week	16.6%
Two to three times per month	4.0%
Once a month	6.9%
Less than once a month and more than six times per year	2.0%
Two to six times per year	4.9%
Once a year	7.7%
Other, don't know, refused	2.8%

Findings

- There is a very high visitation frequency from select visitors. This includes local residents strolling, Downtown workers eating, Downtown workers commuting to their car or transit stop, and students at transit stops.
- There is also a destination element for visitors who come from very far regional areas for specific goods and services available in the area. This includes stores, restaurants, drinking places, etc.



Socio-Economics of Survey Respondents

Age Profile	% of Total
16 to 24	20.8%
25 to 34	17.9%
35 to 44	19.6%
45 to 54	13.8%
55 to 64	13.3%
65 to 74	10.8%
75+	3.8%
Gender	% of Total
Male	56.2%
Female	43.8%
Marital Status	% of Total
Single	50.8%
Married, Common Law	40.5%
Separated, Divorced, Widowed	8.7%
Occupation	% of Total
Working full-time Downtown Hamilton	20.3%
Working part-time Downtown Hamilton	6.6%
Working elsewhere	28.1%
Retired	16.2%
Student	14.5%
Homemaker	5.4%
Other Non-Working	8.4%
Don't know, refused	3.6%

Household Size	% of Total
1	32.5%
2	32.1%
3	19.4%
4	9.5%
5+	6.6%
Household Income	% of Total
<40,000	52.5%
\$40,000 to \$59,999	17.5%
\$60,000 to \$79,999	12.5%
\$80,000 to \$99,999	7.5%
\$100,000 +	10.0%
Party Size	% of Total
1	75.7%
2	18.9%
3+	5.3%
Primary Shopper	% of Total
Primary Shopper	66.5%
Shared primary shopper	13.9%
Not primary shopper	19.6%

Findings

- Visitors to King St. W. BIA tend to be young, male, single, and have low to mid household income including both students and workers
- There is an older population due to the number of seniors' residences nearby
- Over one-quarter work in Downtown



Activities in King St. W. BIA

Reasons for Being in King St. W. BIA	Primary Reason	All Reasons
Live in area	15.2%	15.5%
Passing through	14.4%	19.3%
Coffee, tea, café, snacks	13.6%	32.6%
In transit	8.3%	11.0%
Lunch	7.6%	30.3%
Apparel, shoes, jewellery, accessories	6.1%	26.9%
Strolling	5.3%	9.5%
Working, meeting clients, business, volunteer	4.5%	11.0%
Meeting people, family, friends	4.2%	7.6%
Education, school, learning	3.8%	5.3%
Grocery or food shopping	2.7%	9.1%
Medical services	2.7%	4.9%
Beauty services - spa, hair, nail, tanning	1.9%	4.9%
Jackson Square, Downtown	1.9%	12.5%
Printing services, business services	1.5%	1.9%
Farmers' Market	1.5%	6.1%
Lawyer, accountant, real estate, financial	0.8%	2.3%
Sporting goods, toys, hobby, books, music, etc.	0.4%	1.1%
Restaurant dining	0.4%	1.5%
Drinking	0.4%	1.1%
Fitness, recreation, hiking, biking	0.4%	1.5%
Library	0.4%	4.5%
House of Worship	0.4%	0.4%
Drug store, pharmacy or health related shopping	0.0%	1.1%
Furniture, home furnishings, electronics, interior design	0.0%	0.8%
Hess Village	0.0%	6.4%
Dry cleaner, alterations, tailor	0.0%	0.4%
Theatre, play, music, concert	0.0%	0.4%



Attend a special event, festival	0.0%	0.8%
Art gallery, museum	0.0%	1.1%
Social organization, non-profit	0.0%	0.4%

Findings

- King St. W. is a local neighbourhood that attracts people to socialize and move about.
- The area is a key transition point into and out of Downtown.
- King St. W. is part of the greater Downtown experience including Hamilton Farmers' Market, Jackson Square, Hamilton Library, YMCA, education facilities, etc.
- Food is the main commercial reason that people visit King St. W. One-third of visitors will grab coffee, snack, or have lunch.
- There is cross shopping occurring between the businesses and the destination type businesses that benefits King St. W.
- It is noted that King St. W. has a Walk Score of 87 and a Transit Score of 84 related to the high degree to which the area is close to a wide range of attractions either by foot or by transit.



Prior Activity to Arriving in King St. W. BIA or to Being on the Street

Activities Respondents Engaged in Directly Before Coming to King St. W. BIA	Prior Activity
Came from home, local	55.8%
Came from home, outside of the area	14.6%
Working, meeting clients, business, volunteer	13.3%
Medical services	2.2%
Education, school, learning	1.8%
Coffee, tea, café, snacks	1.3%
Grocery or food shopping	1.3%
Jackson Square, Downtown	1.3%
Passing through	0.9%
Strolling	0.9%
Farmers' Market	0.9%
Sporting goods, toys, hobby, books, music, etc.	0.9%
Library	0.9%
Tourist, visiting from outside of Hamilton	0.9%
Meeting people, family, friends	0.4%
Beauty services - spa, hair, nail, tanning	0.4%
Printing services, business services	0.4%
Lawyer, accountant, real estate, financial	0.4%
Fitness, recreation, hiking, biking	0.4%
House of Worship	0.4%
Dry cleaner, alternations, tailor	0.4%

Findings

- King St. W. currently operates as a conduit moving people from one area to another.
- Many visitors view King St. W. as an extension of their Downtown Hamilton experience. Others view it as an emerging neighbourhood.
- A review of the activities of intercept respondents prior to coming to King St. W. provides both an indication where to potentially use marketing and promotion efforts and commercial gaps or opportunities in the marketplace.



Implications for King St. W. BIA

- Focus on enhancing local neighbourhood connections and be the location for locals to meet and socialize.
- Explore marketing and partnerships with Downtown workers, post-secondary institutions, Jackson Square, Hamilton Farmers' Market, Hamilton Library, hotels, fitness/recreation places, arena and convention centres, etc.

Rating of King St. W. BIA

Factors Affecting Success	Average Rating on a Scale of 1 to 10
Easy to get to	7.79
Excellent service	7.04
Selection of restaurants and cafes	6.54
Price of goods and services	6.31
Safety	6.05
Quality of restaurants and stores	6.00
Cleanliness and overall appearance	5.69
Selection of stores	5.56
Family friendly	5.22
Convenient parking	5.15
Open extended hours in the morning or evening	5.09
Modern, up to date businesses	5.02
Overall King St. W. BIA Rating	6.00

Findings

- Convenient to get to, it is central although parking can be difficult.
- The retail strength is food service related and the selection was good and the quality was average.
- Overall, the average rating was 6 out of ten.
- Local residents were prouder of their area and rated it higher than those from outside the local area.

Implications for King St. W. BIA

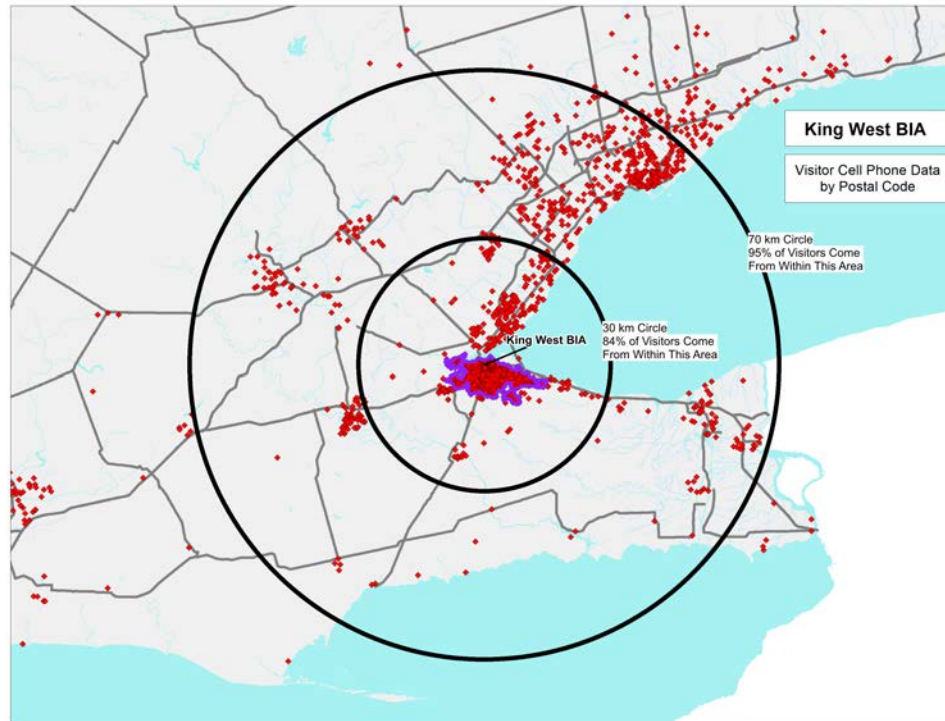
- As you transition from a flow through district based on a combination of convenience-serving and destination-serving businesses to a more local neighbourhood-serving district, the visitation from local residents will increase.
- Businesses need to attract local residents while still maintaining some destination appeal. Businesses need to invest in entrepreneurial ideas



3.3 Cell Phone Data

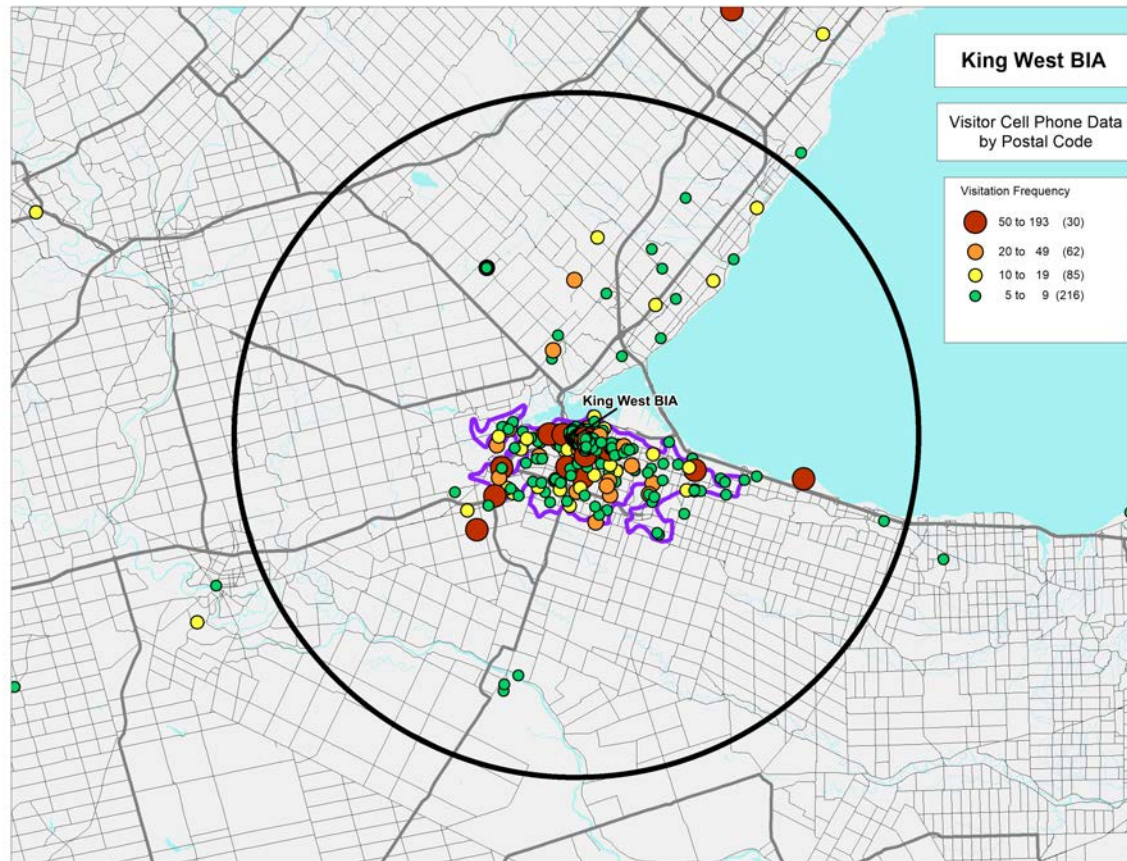
- Cell phone ping data was collected and the corresponding postal code information from November 2015 to November 2016 (one year) based on visitors that were in King St. W. BIA.
- The data was supplied by Uber Media. (not associated with the driving company). Their affiliate, UberRetail, took the data 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 King St. West. The analysis combined with other elements such as observational data, key person interviews, intercept surveys, parking information, 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 King St. W. BIA very frequently.
- The range of home postal codes for the cell phone data is very extensive across the Greater Golden Horseshoe and Southwestern Ontario.
- This was an early testing stage with King St. W. 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.

King St. W. BIA Visitor Cell Phone Corresponding Postal Code – November 2015 to November 2016



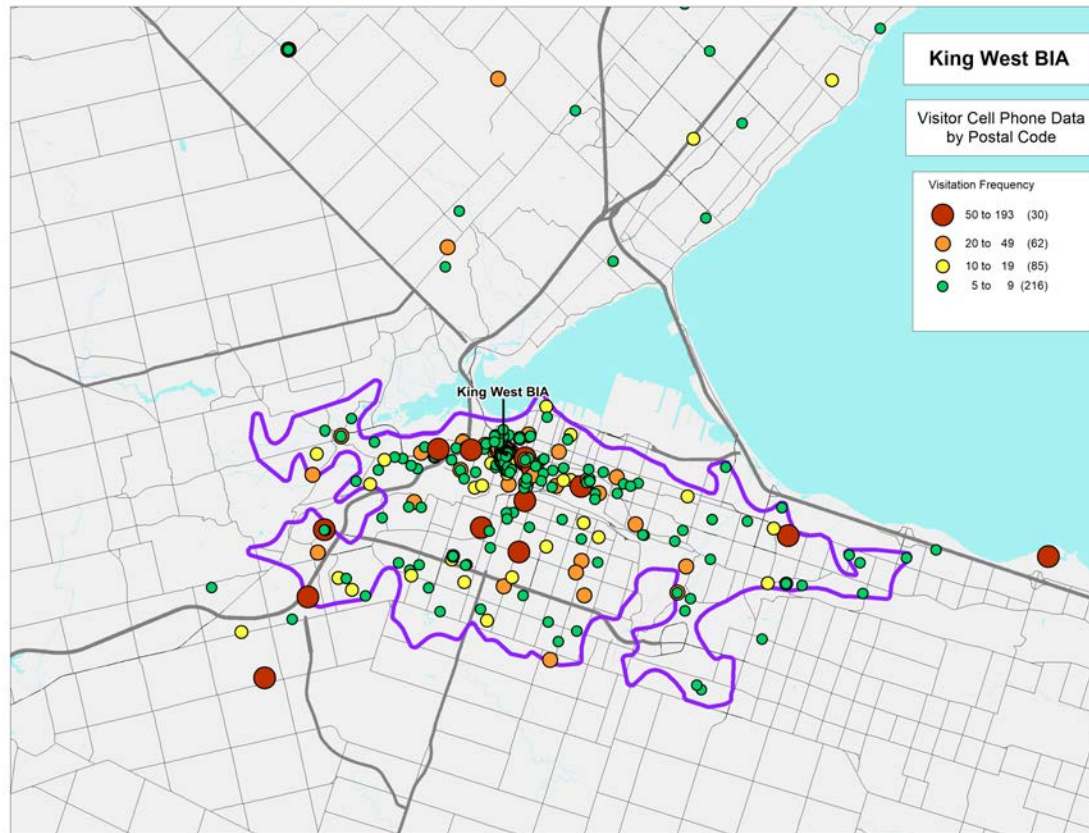
Source: GeoMarketing Solutions

King St. W. BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016



Source: GeoMarketing Solutions – excludes visitors who are in the BIA less than 5 times per year

King St. W. BIA Visitor Cell Phone Corresponding Postal Codes and Frequent Visitation – November 2015 to November 2016



Source: GeoMarketing Solutions



King St. W. BIA Sample Visitation Frequency – November 2015 to November 2016

King St. W. BIA	Number of Visitors	Average Distance Travelled	Average Household Income	Median Age	% Some University or Higher
West Downtown Lower City			\$48,043	38.9	31.9%
Visitation Frequency					
Frequent Visitors (100+ visits)	14	4.84	\$46,898	40.08	38.17
All Visitors Less Frequent	3,976	31.36	\$85,053	39.79	29.80
1 Visit	2,700	33.94	\$88,324	39.72	29.65
2 to 5 Visits	976	28.28	\$79,802	39.69	30.45
6 to 12 Visits	175	22.84	\$73,123	41.31	28.28
13 to 24 Visits	60	18.40	\$67,997	39.83	33.41
25 to 49 Visits	49	2.30	\$59,588	39.84	28.53
50 to 99 Visits	16	13.74	\$96,695	41.81	25.39
Time of Day					
6 am to 10 am	616	32.96	\$75,414	40.29	29.25
10 am to 2 pm	1,044	25.77	\$83,419	40.27	29.07
2 pm to 6 pm	1,279	29.22	\$84,297	40.05	30.54
6 pm to 10 pm	1,350	25.67	\$81,572	39.94	30.86
10 pm to 2 am	1,106	32.02	\$80,758	39.66	29.66
Weekday and Weekend					
All weekday	3,005	29.30	\$84,042	40.02	29.55
All Weekend	1,724	32.23	\$82,024	39.61	30.36
Events					
All Bulldog Games - from 4 pm to midnight	172	25.95	\$84,716	40.05	30.33

Source: Geomarketing Solutions

Findings

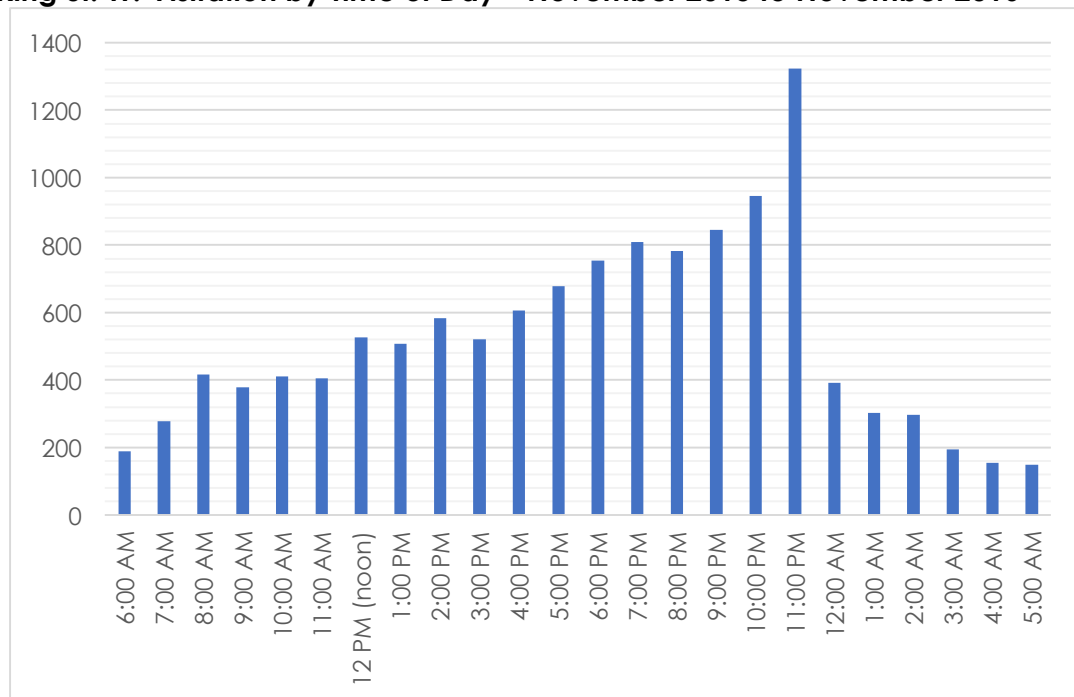
- King St. W. BIA draws from a local area that stretches from south east Downtown (Stinson) to north west Lower City (Stratchona).
- Regionally, the businesses attract people from a broad cross section.
- There is a combination of frequent core visitors as well as regional visitors who visit only once or twice in a given year.



- With increased visitation, the average travel time diminishes, average household income falls, the median age falls, and the proportion that have a university degree increases. The exception is those who visit 50 to 99 times per year. Those visitors have very high household incomes.
- Visitors during the day from 10 am to 6 pm have higher household incomes and are older compared to other visitors.
- During the evening, visitors tend to have slightly lower household income and tend to be younger.
- Most Bulldog games at First Ontario Centre, the visitors in King St. W. BIA tend to have higher household incomes, are older, and have similar probability of having a university degree compared to other visitors at a similar time of day.



King St. W. Visitation by Time of Day – November 2015 to November 2016



Source: GeoMarketing Solutions

Findings

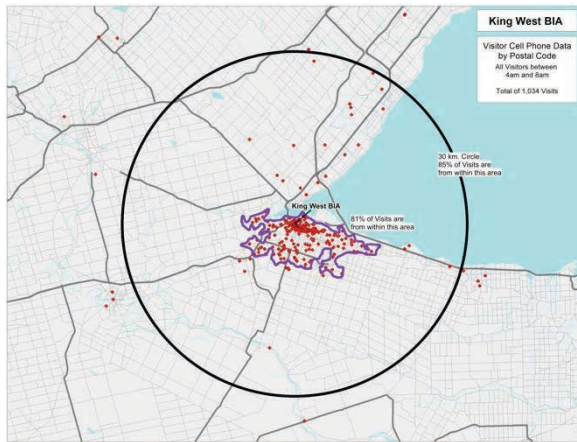
- Visitation to King St. W. builds throughout the day and reaches a peak at 11:00 pm.
- There is a morning spike, a lunch time spike, and dinner time spike, and a late evening spike.
- This reaffirms the accessibility and convenience aspect of King St. W. and the constantly evolving character of the street throughout the 24 hours in a day.



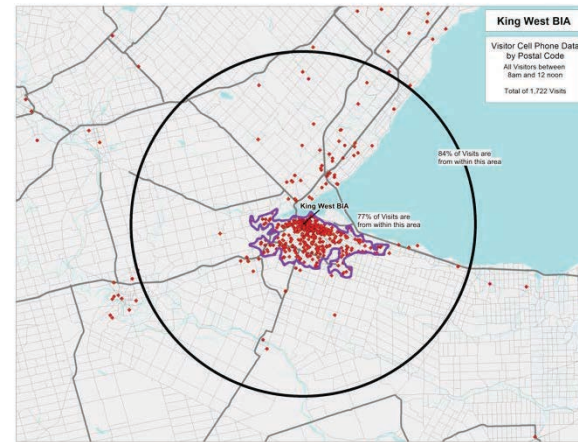
Implications for King St. BIA

- Based on the preceding analysis, the trade areas for King St. W. BIA are:
 - Immediate area: five-minute walking distance (400 m radius)
 - West Lower City: focused on neighbourhoods of Central, Downtown, Strathcona, Durand, and parts of and Kirkendall, Beasley, and Stinson
 - West Lower City and West Upper Mountain
 - Greater Golden Horseshoe

Trade Area of Visitors by Time of Day



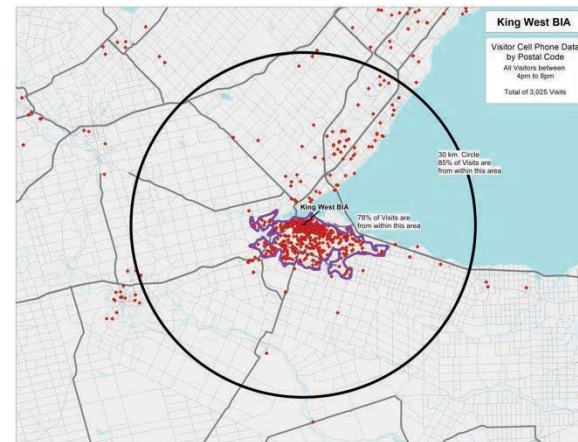
4 am to 8 am



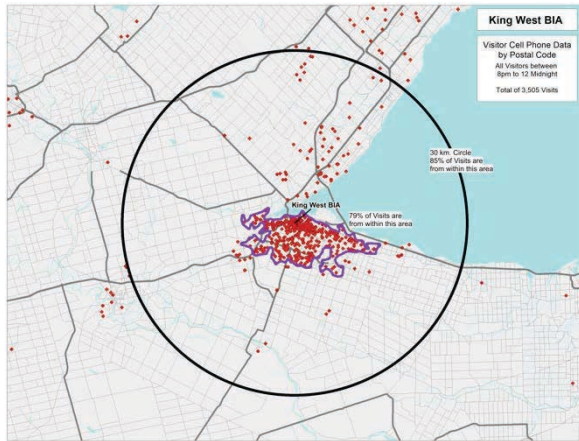
8 am to 12 pm (noon)



12 pm (noon) to 4 pm

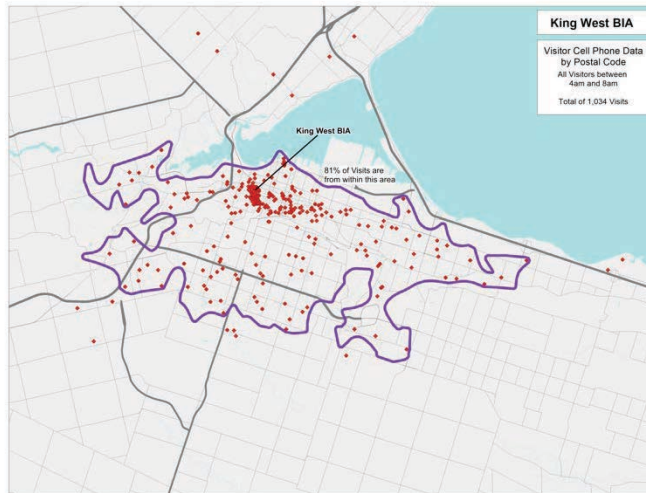


4 pm to 8 pm

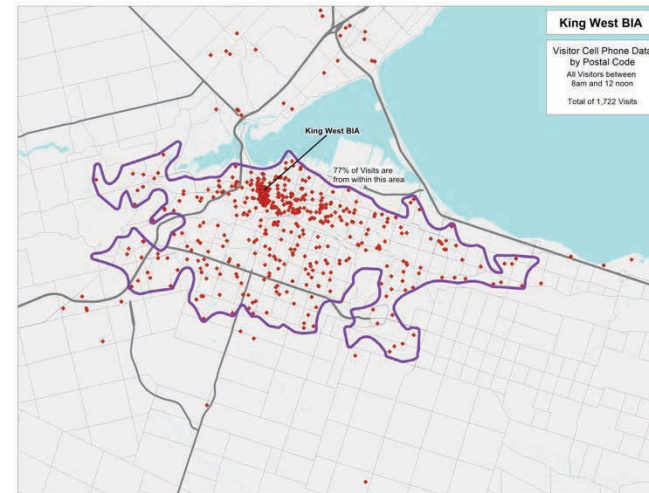


8 pm to 12 am (midnight)

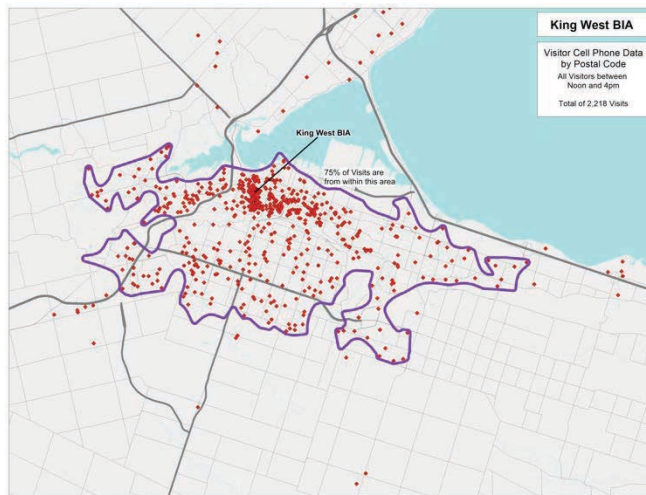
Trade Area of Visitors by Time of Day



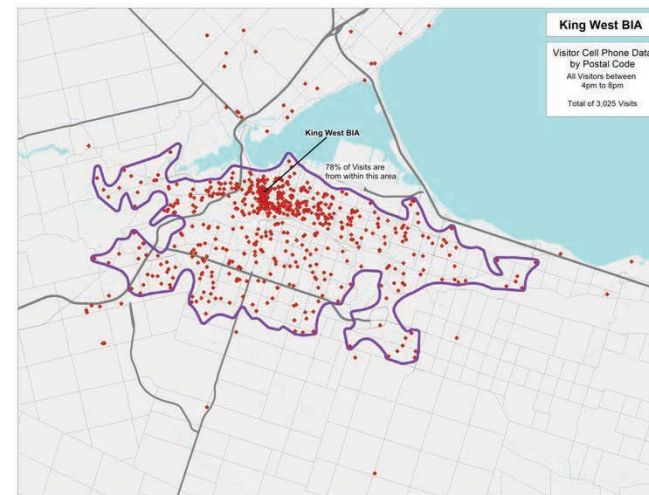
4 am to 8 am



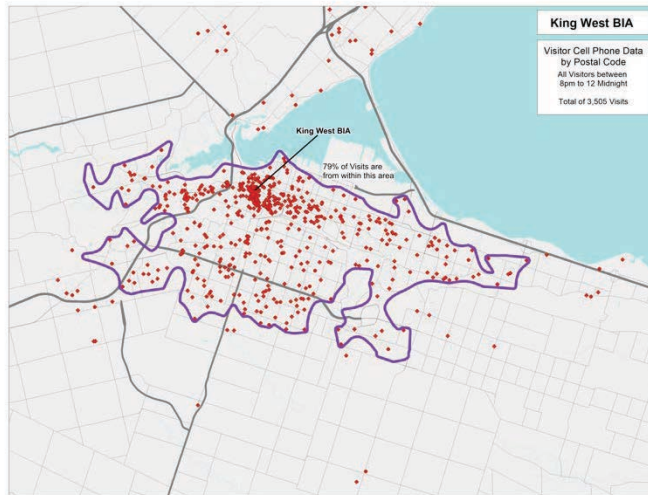
8 am to 12 pm (noon)



12 pm (noon) to 4 pm



4 pm to 8 pm



8 pm to 12 am (midnight)

Source: Geomarketing Solutions



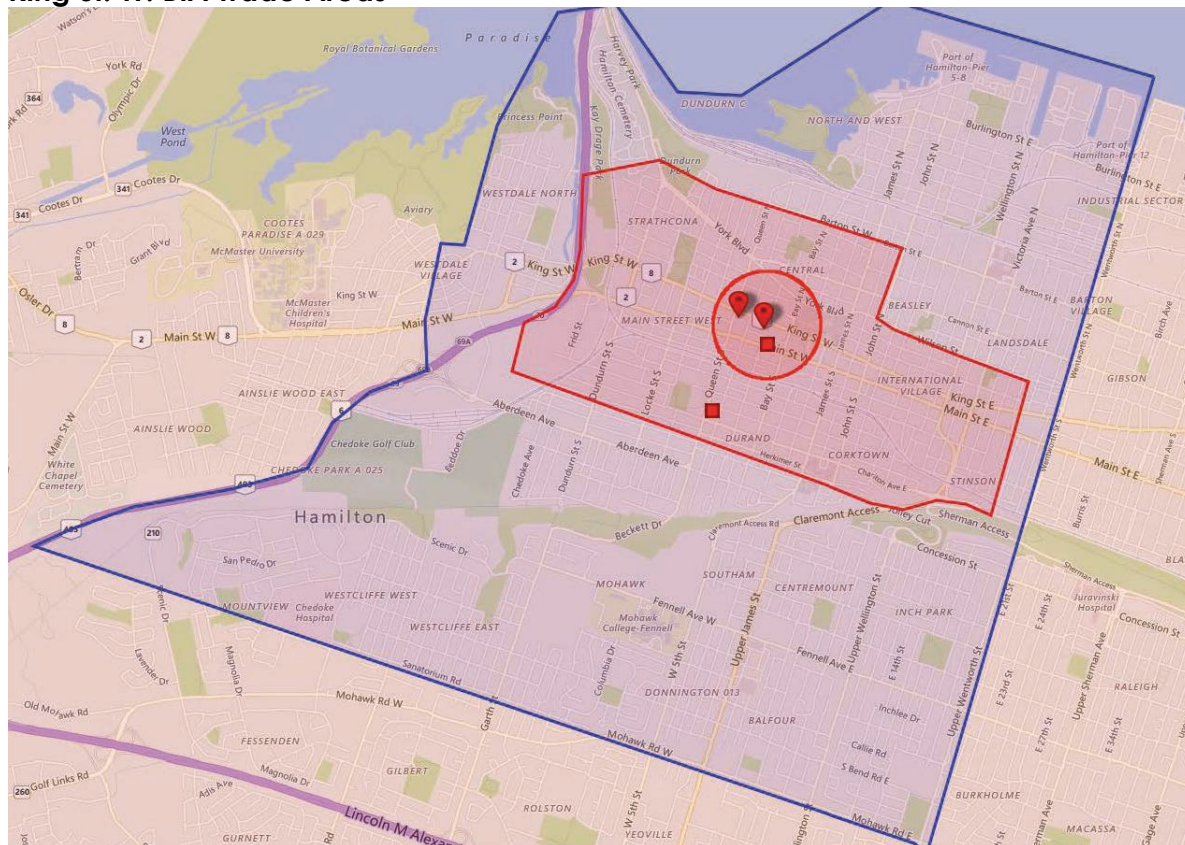
Findings

- 4 am to 8 am: Hyper local customer base
- 8 am to 12 pm: Local and West Downtown customer base
- 12 pm to 4 pm: Greater Downtown Area customer base
- 4 pm to 8 pm: Local and broad regional customer base
- 8 pm to 12 am: Hyper local and some broad regional customer base

4.0 Trade Area Socio-Economic Review

Based on the preceding analysis to determine the relevant trade areas for King St. W. BIA the following analysis assesses key findings based on the socio-economic review.

King St. W. BIA Trade Areas





Trade areas include:

- Immediate: 5-minute walking distance measured by 400-meter radius from King St. W. and Caroline St. S.
- West Downtown Lower City: Barton Street to Herkimer St. and from Highway 403 to Erie Ave.
- West Lower City/Mountain: Harbour to Sanatorium/Mohawk Rd. and from Westdale Village to Wentworth St.
- City of Hamilton
- 60-minute drive time



Population, Households, and Daytime Workers

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
2011 Population	4,560	37,994	88,013	519,950	4,940,729
2016 Est. Population	5,070	40,748	93,013	555,841	5,428,211
Annualized Population Growth Rate	2.1%	1.4%	1.1%	1.3%	1.9%
Households	3,388	22,583	44,295	220,822	2,059,081
Annualized Household Growth Rate	1.7%	1.0%	0.6%	0.9%	1.4%
Daytime Worker Population	5,857	57,583	82,576	228,040	3,002,180

Source: Statistics Canada, Environics Estimates 2016

Findings

- Sizeable population immediately surrounding King St. W. BIA but needs increased density to attain neighbourhood retail opportunities.
- Fast growing area and anticipated growth by a further 915 units or 1,464 residents (1.6 residents per unit).
- Population growth is outpacing household growth resulting in larger household sizes as young families move into the area and begin to have children.
- Sizeable daytime worker population for businesses to cater to this target market.



Age Profile, Gender, and Ethnicity

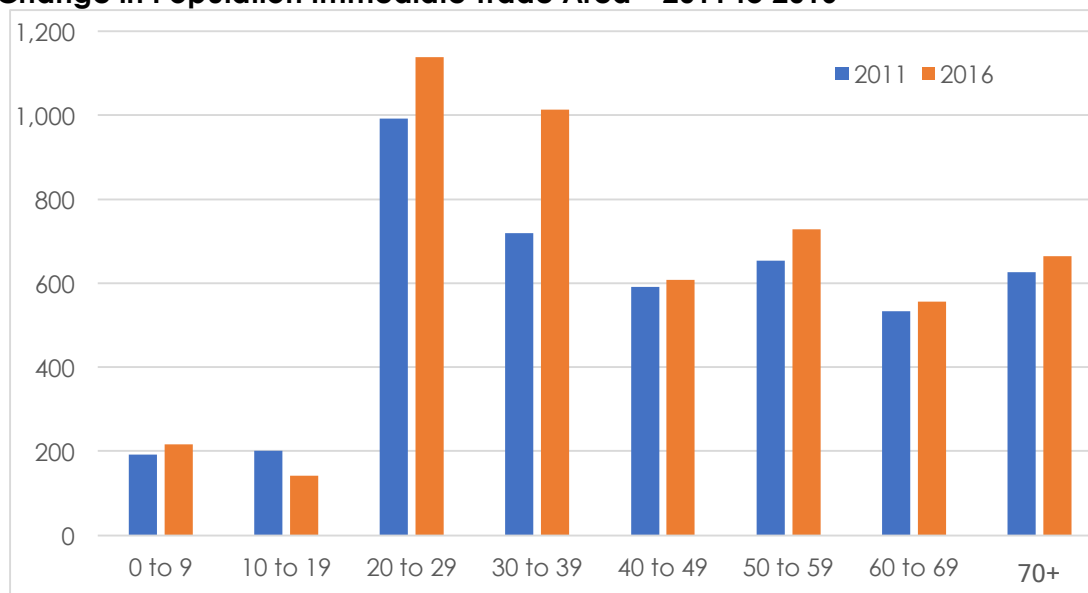
	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Age Profile					
0 to 9	4.3%	7.3%	8.9%	10.3%	10.8%
10 to 19	2.8%	6.5%	8.8%	11.1%	11.1%
20 to 29	22.4%	20.3%	18.1%	14.8%	14.7%
30 to 39	20.0%	17.5%	15.3%	12.9%	14.9%
40 to 49	12.0%	12.0%	12.1%	12.7%	13.9%
50 to 59	14.4%	13.7%	14.3%	14.9%	14.2%
60 to 69	11.0%	11.5%	11.1%	11.6%	10.3%
70+	13.1%	11.2%	11.3%	11.6%	10.0%
Median Age	40.4	38.9	39.1	40.7	38.9
Gender					
Male/Female	53.0/47.0	49.6/50.4	50.2/49.8	49.3/50.7	49.1/50.9
Ethnicity					
Visible Minority	29.1%	27.7%	21.7%	16.9%	36.8%

Source: Statistics Canada, Environics Estimates 2016

Findings

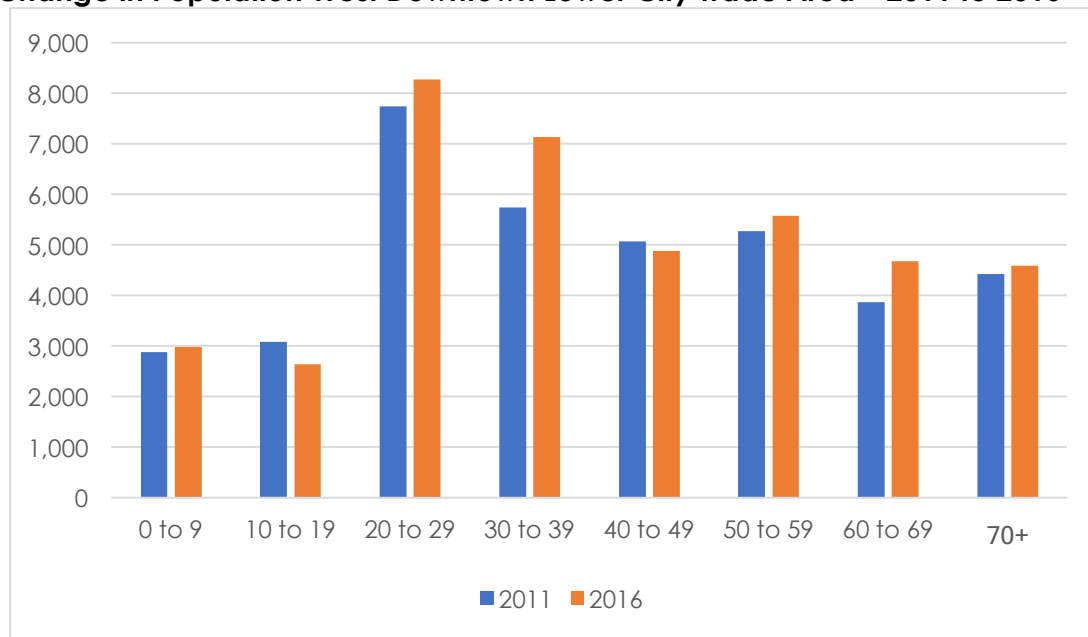
- The age profile skews young adult due to the high proportion of students living in the area. 42% of the local trade area is 20 to 39 years of age
- There is a sizeable senior population due to the number of seniors' residences in the area
- The local area has a higher proportion of males. Young male students prefer to live closer to Downtown and Hess Village compared to females.
- The area has a higher proportion of visible minorities but Hamilton has a lower percentage compared to elsewhere in the greater region.

Change in Population Immediate Trade Area – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

Change in Population West Downtown Lower City Trade Area – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

Findings

- Young adults aged 20 to 39 experienced the highest growth.
- There was growth across almost all age categories except for 10 to 19 year olds
- There is growth for young families and young children.



Household Size and Marital Status

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Household Size					
1 Person	68.6%	56.6%	44.6%	27.7%	26.3%
2 Person	22.1%	27.1%	29.7%	32.7%	29.7%
3 Person	5.8%	8.8%	11.8%	16.0%	16.5%
4 + Person	3.5%	7.5%	13.9%	23.6%	27.5%
Person Per Household	1.48	1.73	2.03	2.47	2.60
Marital Status					
Single	44.1%	41.4%	36.9%	29.3%	30.3%
Married, Common Law	29.0%	33.7%	41.7%	53.5%	54.8%
Separated, Divorced, Widowed	26.9%	24.9%	21.4%	17.2%	14.9%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Given the high proportion of students and seniors, the proportion of single person households is 69%. In addition, 44% of the population is single which is higher than elsewhere.
- As noted, the population growth is exceeding the household growth which indicates that families are moving into the area (couples, couples with children, etc.)



Education, Occupation, and Home Ownership

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Education					
Less than High School	20.5%	21.4%	22.3%	21.0%	18.1%
High School Graduate	20.6%	23.4%	24.2%	26.2%	24.6%
College, Diploma	23.0%	23.3%	24.5%	26.6%	23.1%
University Graduate	35.9%	31.9%	29.0%	26.2%	34.2%
Occupation					
Management	18.4%	18.7%	19.2%	23.2%	27.4%
Science	4.4%	6.9%	6.7%	6.2%	8.2%
Health	10.0%	8.0%	8.2%	7.6%	5.4%
Govt, Ed., Social Services	17.4%	14.9%	14.9%	12.4%	11.7%
Arts, Culture, Recreation	3.8%	4.8%	4.2%	2.8%	3.5%
Sales and Service	26.3%	25.0%	23.7%	23.9%	23.8%
Other	17.1%	17.9%	19.8%	21.2%	17.5%
Labour Force Participation	48.8%	54.4%	55.5%	58.3%	64.6%
Ownership to Renters	20.5/79.5	25.0/75.0	45.9/54.1	69.9/30.4	66.8/33.2

Source: Statistics Canada, Environics Estimates 2016

Findings

- Local area residents are well educated. 36% have some university level education or higher.
- Local residents include workers but also a higher degree of students and seniors. The labour force participation rate is under 50%.
- Those who work include both professionals and blue collar workers but it includes a higher proportion of occupations in the field of government, education, social service as well as health professionals.
- 80% of households rent their home.



Travel to Work

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Travel to Work					
Vehicle - Driver or Passenger	29.8%	54.0%	64.9%	81.0%	71.8%
Public Transit	26.4%	24.6%	18.8%	11.2%	19.9%
Walk	17.0%	17.8%	12.8%	5.9%	5.7%
Bike	2.4%	1.9%	1.9%	1.0%	1.5%
Other	1.3%	1.7%	1.5%	1.0%	1.1%

Source: Statistics Canada, Environics Estimates 2016

Findings

- While a slight majority of working residents in the area still rely on a vehicle to get to and from work, approximately one-quarter use public transit.
- Additionally, 17% will walk to work.
- As in other cities, there is a growing tendency to want to live close to where one works and this trend is reflected in the trade areas for King St. W.



Household Income

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Household Income					
< \$20,000	44.0%	26.2%	19.4%	11.3%	11.2%
\$20,000 to \$39,999	25.6%	28.5%	23.3%	16.2%	14.8%
\$40,000 to \$59,999	16.1%	20.9%	19.7%	16.3%	15.0%
\$60,000 to \$79,999	8.6%	10.6%	12.7%	13.9%	13.3%
\$80,000 to \$99,999	1.9%	5.1%	7.9%	9.2%	11.0%
\$100,000 to \$149,999	3.8%	8.6%	17.1%	31.0%	34.7%
Average Household Income	\$34,060	\$48,043	\$64,848	\$90,192	\$105,305
Real Annualized Growth in Household Income	0.0%	0.4%	0.6%	0.9%	0.6%

Source: Statistics Canada, Environics Estimates 2016

Findings

- Average household income is relatively low accounting for students and seniors living in the area.
- Gentrification is occurring throughout the Lower City including in neighbourhoods that are close to King St. W. – Kirkendall, Durand, Downtown, Stinson, and Central.
- Real household income growth (excluding inflation) is positive in these trade areas.



New Residential Developments

Recently Completed and Proposed Residential Development

King St. W. BIA Local Area Residential			
Development	Address	Number of Units	Status
149 Main	149 Main St. W.	73	2016
150 Main	150 Main St. W.	142	2016
Bella	140 Main St. W.	322	2016
20 George	20 George St.	178	2018
15 Queen	15 Queen St. S.	212	TBD
Total Near King St. W.		927	
Other Downtown Residential			
Tiffany Square	Bay St. N.	164	2016
Beasley	188 Wilson St.	6	2016
101 Locke	101 Locke	80	2017
Vista	467 Charlton St.	152	2017
220 Cannon	220 Cannon St.	100	2017
Royal Connaught		700	2017
Essex	366 Bay St. N.	6	2017
Templar Flats	King William	23	2017
220 Dundurn	220 Dundurn St. S.	124	2017
William Thomas	46-52 James St. N.	146	2017
Tivoli	James St. N.	106	2018
Connolly	98 James St. S.	259	2018
Acclamation Lofts	185 James St. N.	71	2018
Pasadena	127 Bold St.	32	2018
Gibson School Lofts	Barton St.	100	TBD
Total Other Downtown		2,081	



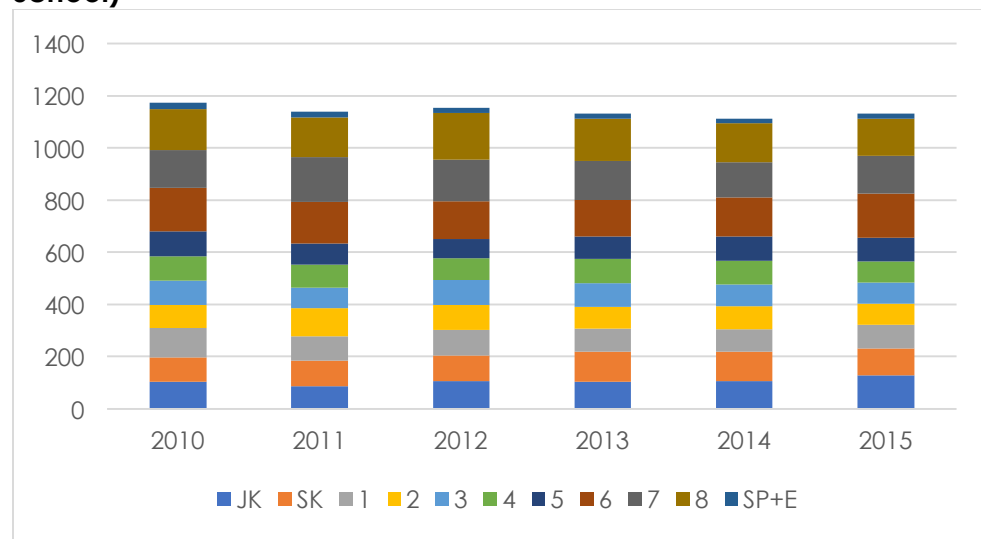
Findings

- There are 927 proposed or under construction residential units within a five-minute walking distance of King St. W. BIA. This will add a further 1,483 new residents to area within a short period. In addition, there are several other soon-to-be announced projects including the north-west corner of King St. W. and Queen St. N.
- There are a number of student residences proposed in and near King St. W. BIA including 146 apartments at 46 James St. North as well as others yet to be announced.

4.1 School Enrollment

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

School Enrollment 2010 to 2015 (Central Public School, Hess St. Junior Public School, Ryerson Middle School, Strathcona School)



Source: Hamilton Wentworth School District

Findings

- School enrollment had been falling modestly in total from 2010 to 2015. However, closer examination reveals an uptick in Junior and Senior Kindergarten aged children and a small uptick in total enrollment. More young families are living in the area. This is particularly noticeable for Central Public School.



4.2 Household Expenditure

Household Expenditure

	Immediate	West Downtown Lower City	West Lower City/Mountain	Hamilton	60 Minute Drive Time
Women's Clothing and Accessories	\$838	\$1,080	\$1,419	\$2,006	\$2,288
Men's Clothing and Accessories	\$452	\$594	\$764	\$1,077	\$1,422
Children's Clothing and Accessories	\$20	\$32	\$45	\$62	\$113
Clothing Gifts	\$38	\$51	\$62	\$79	\$72
Furniture	\$615	\$757	\$950	\$1,331	\$1,746
Electronics	\$458	\$562	\$689	\$907	\$1,145
Leisure Goods	\$475	\$685	\$969	\$861	\$2,872
Florists	\$120	\$173	\$291	\$445	\$320
Food from Stores	\$3,495	\$4,763	\$6,238	\$8,514	\$8,642
Alcohol Purchased from Stores	\$603	\$881	\$1,243	\$1,546	\$1,604
Food from Restaurants	\$1,795	\$2,285	\$2,874	\$3,582	\$3,917
Alcohol from Restaurants	\$313	\$381	\$467	\$511	\$730
Health and Pharmacy Goods	\$1,237	\$1,551	\$1,814	\$2,364	\$2,496
Personal Care Services	\$414	\$539	\$691	\$983	\$1,189
Packaged Travel	\$184	\$244	\$417	\$797	\$850
Laundry and Dry Cleaning	\$96	\$129	\$120	\$119	\$196
Recreational Services	\$147	\$204	\$316	\$480	\$541
Movies	\$51	\$66	\$133	\$92	\$196
Live Sporting Events	\$32	\$68	\$84	\$71	\$88
Live Performing Arts	\$98	\$111	\$159	\$202	\$163

Source: Statistics Canada, Environics Estimates 2016



Findings

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

- Laundry services
- Alcohol from restaurants/bars
- Movies
- Leisure goods (sporting goods, books, music, arts/crafts, toys, etc.)
- Electronic goods
- Food from restaurants
- Live performing arts
- Live sporting events
- Gifts
- Furniture and home furnishings
- Men's clothing and accessories
- Women's clothing and accessories

In addition, according to the intercept survey, respondents noted their visitation frequency and expenditure per person for the following select food service categories.

Intercept Survey Respondents Expenditure Pattern on Food Services

	Average Number of Time Go Out in a Typical Month	Average Number of Times Go Out in King St. W. in a Typical Month	Average Amount Spent Per Person Per Visit
Coffee, Tea, Snacks	11.63	5.09	\$3.78
Fast Food	3.51	1.53	\$7.20
Dinner	4.36	1.34	\$17.73
Drinks out	1.09	0.59	\$8.22

Source: 360 Collective, Page by Page Consulting

Findings

- On average, respondents go out for dinner once a week and go out for drinks once a month.
- Average expenditure per person is \$17.73 for dinner.
- Respondents go for coffee, tea, snacks approximately three times a week and spend on average \$378.



5.0 Other Major Target Markets and Customer Visitation

The location of King St. W. BIA relative to Downtown Hamilton, post-secondary institutions, and the region make it accessible to a wide range of potential target markets and retail commercial sales opportunities. These target markets include:

- Downtown workers
- Hamilton Bulldogs and First Ontario Centre Events
- Art Gallery of Hamilton
- Scottish Rite attendees
- Students and David Braley Health Services Centre
- Hotel visitors

Daytime Workers

There are an estimated 25,932 daytime workers in Downtown Hamilton according to the City of Hamilton. This represents an increase of over 1,000 workers from 2015 to 2016. Daytime workers are in Downtown generally from Monday to Friday and from 9:00 am to 5:00 pm. They include office workers as well as retail and hospitality workers, health care workers, education workers, etc.

According to other recent statistics:

- Downtown accounts for approximately 10% of all Hamilton jobs
- Over one-quarter are in Public Administration followed by Finance and Insurance and Professional Scientific and Technical Services
- 31% of Downtown workers have been to University
- 25% earn more than \$60,000 annually
- Vehicular usage to commute to Downtown accounts for 75% of workers.

Workers tend to spend at least \$1,500 on breakfast, lunch, and snacks during the day. For some workers, it can be as high as \$2,300 annually (based on previous work 360 Collective has done for other Downtowns and worker environments).



From the King St. W. intercept survey carried out by 360 Collective, the following are salient findings from those who identified themselves as Downtown workers:

- 44% of all day-time intercept respondents identified themselves as a Downtown worker.
- Their reasons for being in King St. W. BIA varied from eating to passing through, to picking up their car, to an appointment, to strolling/recreation. The majority are regular visitors as 64% are in King St. W. five days/per week
- 58% walked, 17% took public transit, and 17% drove their vehicle to King St. W. BIA.

In terms of the top five attributes Downtown workers look for in food selection are:

- Quality of food
- Cheap price, good value
- Proximity
- Healthy options
- Selection

Within a five-minute walk of King St. W. BIA, there are 7,694 workers (both to the east and to the west near Main St. W.)

This represents over \$8.9 million in potential food service sales. King St. W. could capture 5% to 10% of these sales accounting for \$439,275 to \$878,550 in breakfast and lunch time sales.

Hamilton Bulldogs

First Ontario Centre is home to 34 hockey games. In the past, average attendance per game is 5,342. Total attendance was just over 180,000 annually (note excludes any post season playoff games). The franchise is now a major junior team playing in the Ontario Hockey League.

Average expenditure on food and drink either before or after a game is \$12 per person. (based on previous work conducted by 360 Collective on arena food service expenditure). This is equivalent to \$2.2 million in total revenue. King St. W. could capture 5% to 10% of these sales accounting for \$108,000 to \$218,000 in potential restaurant sales.

First Ontario Centre – Concerts and Events

There are an estimated 10 additional big events at First Ontario Centre including concerts, events, monster truck rallies, etc. Total capacity of the venue is 17,000 to 19,000 depending on configuration. Total attendance is estimated to be 170,000.



Average expenditure on food and drink either before or after the event is \$17 per person. This is equivalent to \$2.89 million in total revenue. King St. W. could capture 5% to 10% of these sales accounting for \$144,500 to \$289,000 in potential restaurant sales.

Note there are a further 30 events at Hamilton Place but the event facility is just beyond the five-minute walk.

Art Gallery of Hamilton

The art gallery attracts approximately 244,195 visitors annually (source Art Gallery of Hamilton 2015).

The visitor profile includes:

- 46% Local
- 25% Ontario
- 12% Other parts of Canada
- 5% International visitors

Per person expenditure is usually limited to \$2 to \$4 on food service type expenditures. This is equivalent to \$488,390 to \$976,780 in potential food service sales.

King St. W. could capture 5% of these sales accounting for \$24,420 to \$48,839 in potential food service sales.

Scottish Rite

The event facility is primarily self-contained. Events are catered. There is some spillover effect from public events and concerts.

Students

King St. W. BIA is ideally situated at equal access points to McMaster University and Mohawk College. The local area surrounding the BIA houses a high percentage of students due to its convenient access to both schools.

Mohawk College has three campuses:

- Fennell
- McMaster University
- Stoney Creek



In total, there are 12,500 full time, 4,000 apprentice, 46,000 continuing education, and 1,800 international students.

McMaster has 25,174 undergraduates and 4,237 graduates.

Immediately adjacent to King St. W. BIA is the 192,000-sq. ft. David Braley Health Services Centre which has:

- 560 staff
- Over 4,000 students will use the centre
- 54,000 medical clinic visits

Focusing on the student population, this includes first year nursing students as well as medical residents. Students spend \$300 on food services (snacks and lunch) annually and a further \$600 on dinner and drinks. This is equivalent to \$3.6 million in food service expenditure. The students are not in the Centre full time and will be elsewhere in McMaster. King St. W. could capture a small proportion of this potential sales. A capture rate of 2% represent \$72,000 in potential sales.

It is important to note, in terms of the students who were in King St. W. BIA during the intercept survey, they ranked King St. W. businesses lower in terms of quality and selection of stores and restaurants and safety.



Hotels – Overnight Accommodation

There are four major hotels in close proximity to King St. W.:

- Homewood Suites 200 rooms
- Staybridge Suites 129 rooms
- Sheraton 299 rooms
- Arrival Inn 74 rooms

Expenditure potential is based on:

- Rooms: 702
- Occupancy: 65.7% (Source: City of Hamilton Tourism and Culture Division)
- Average overnight visitor expenditure per trip on food services: \$91.84
- Average length of stay: 2.5 nights
- Average person per room: 1.6 people per room
- \$9.9 million in potential food service sales

Implications for King St. W. BIA

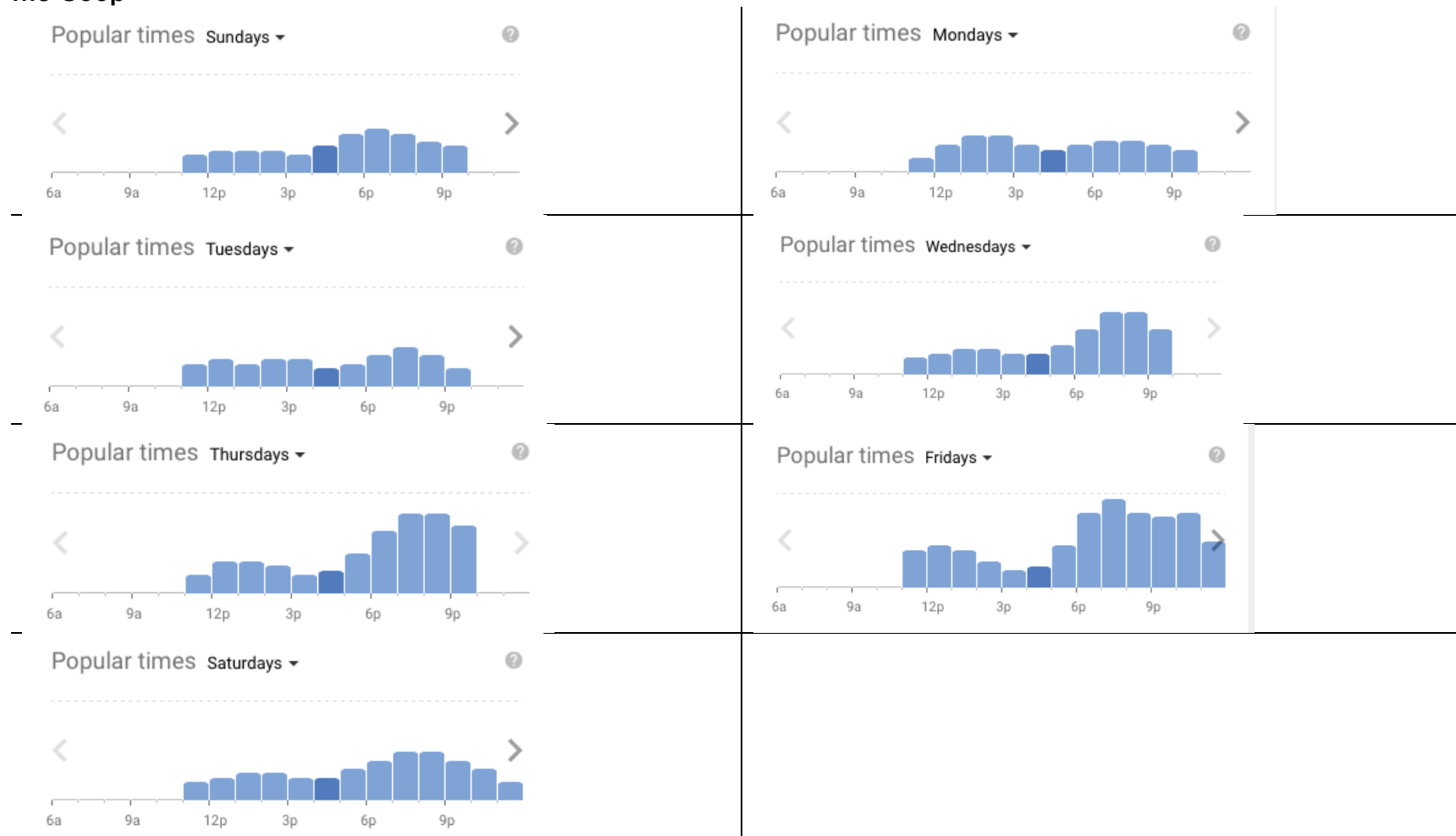
- Businesses in the BIA need to be flexible enough and nimble in their marketing and merchandising to adjust and respond to these target markets.
- A common thread amongst all the target markets is food services – fast, fresh, good quality, and good value
- Hospitality and concierge type marketing programs should be developed by the BIA to promote to these varied target markets

5.1 Customer Visitation Data

Customer Flow Times

The following graphs illustrate customer visitation at select King St. W. BIA businesses.

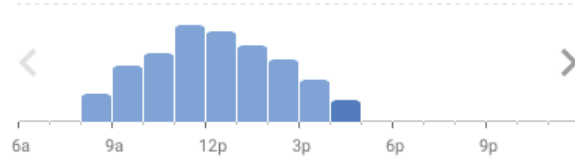
The Coop



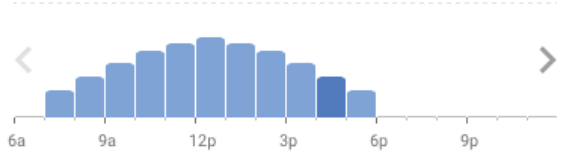


Ark and Anchor

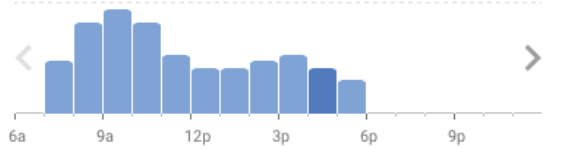
Popular times Sundays ▼



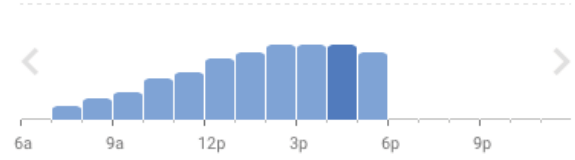
Popular times Wednesdays ▼



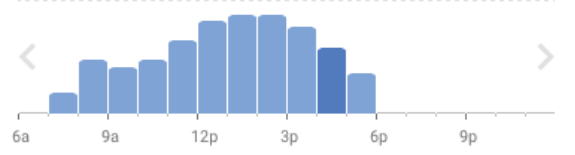
Popular times Fridays ▼



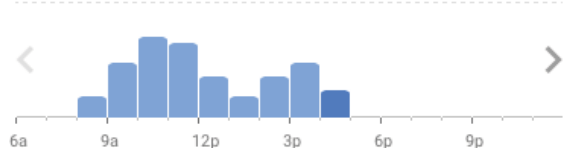
Popular times Mondays ▼



Popular times Thursdays ▼

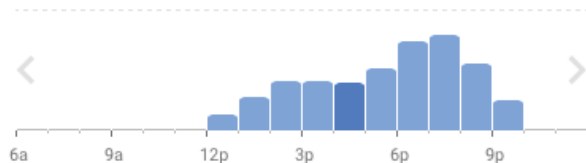


Popular times Saturdays ▼

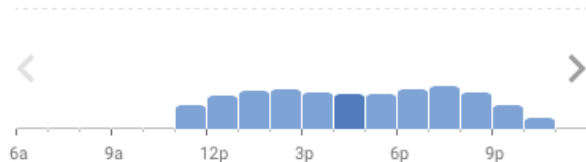


La Luna

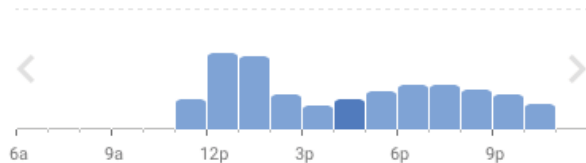
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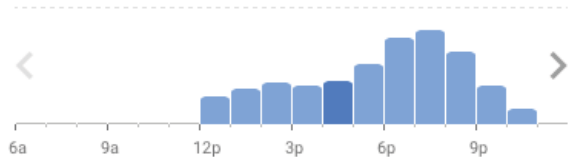
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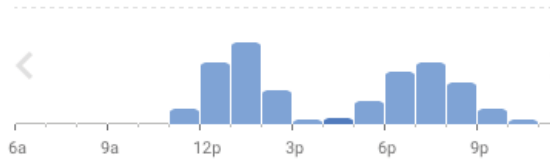
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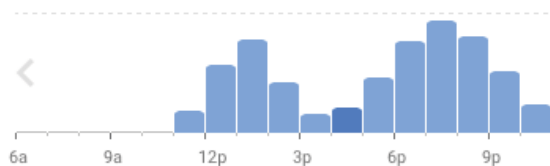
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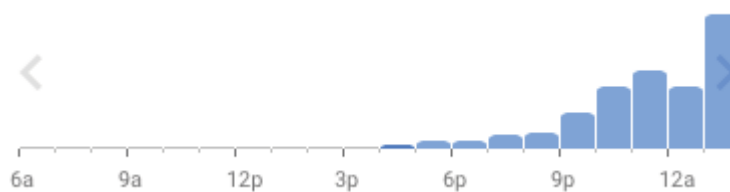
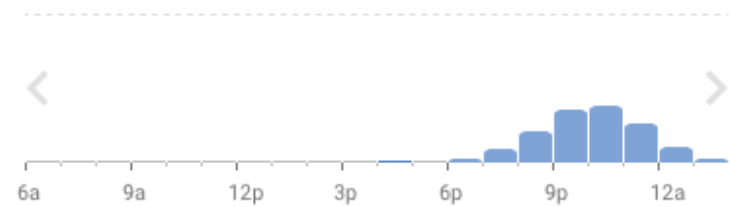
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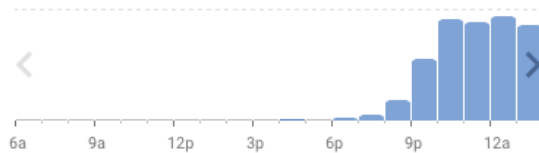
Popular times Fridays ▾



Casbah



Popular times Fridays





Papagayo

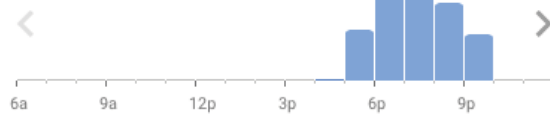
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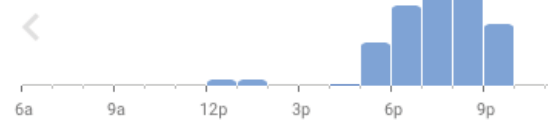
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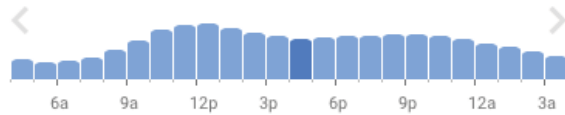


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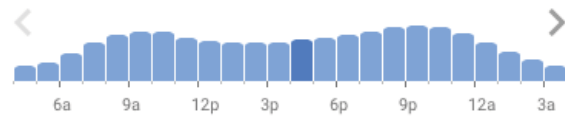


Tim Hortons

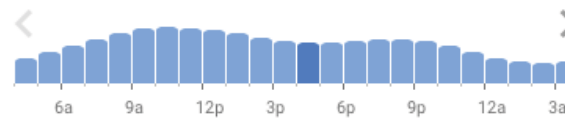
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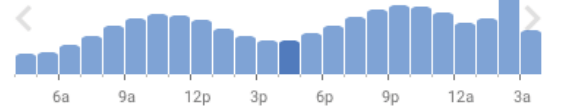
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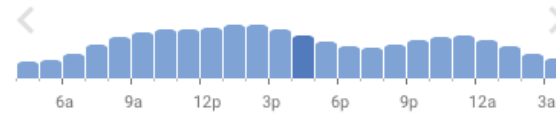
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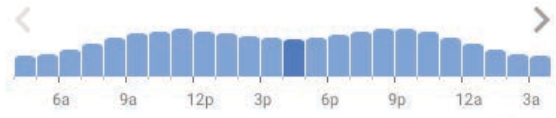
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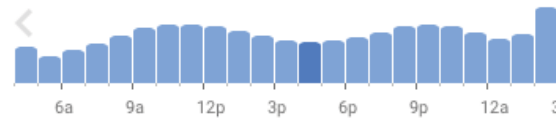
Popular times Mondays ▾



Popular times Wednesdays ▾



Popular times Fridays ▾





Findings

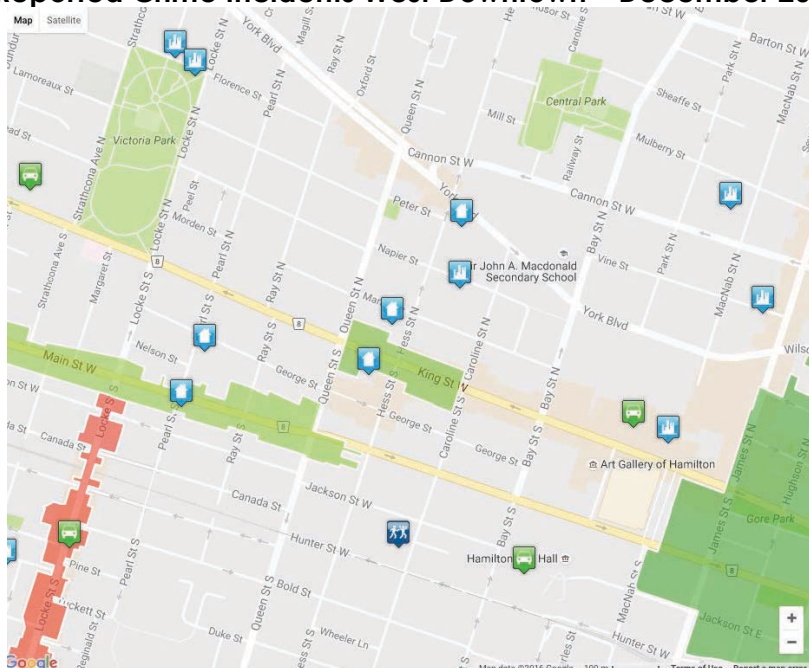
- Peak periods for different business vary considerably. Some businesses are able to cater to the morning office workers and students commuting into work or school. Other businesses cater to the Hess Village visitors in the late evening.
- There is a combination of convenience and experience:
 - Convenience for quick snacks, coffee, tea, quick lunches, and late evening eating post going out
 - Experience for unique food and experiences in the early evening period
- Most food service operators rely on at least two spikes in visitation (breakfast/lunch, lunch/dinner, lunch/late evening, etc.

6.0 Quality of Life Statistics – Crime Statistics and Housing Prices

6.1 Crime Statistics

Within a 500-m radius of King St. W. BIA, there have been 12 reported incidents from December 2015 to November 2016. This does not appear to be higher or lower compared to other Lower City areas.

Reported Crime Incidents West Downtown – 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 Hamilton West increased 18.8% from 2015 to 2016. Hamilton West includes the Lower City west of James St. as well as Westdale and Ainslie Woods.

Average house prices increased from \$293,065 to \$447,067. From 2012 to 2016, average prices increased at an annualized rate of 11.1%.

Hamilton West Average House Price

Year	Average House Price	Year-Over-Year Change
2012	\$293,065	
2013	\$319,602	9.1%
2014	\$345,044	8.0%
2015	\$376,443	9.1%
2016	\$447,067	18.8%

Source: Realtors' Association of Hamilton and Burlington



7.0 Commercial Audit and Rent Review

An audit of the commercial businesses in King St. W. 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).

King St. W. BIA Commercial Business Audit – 2016

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
Retail Merchandise				
Clothing and Accessories	2	6.3%	2,100	4.1%
Furniture and Home Furnishings	0	0.0%	0	0.0%
Electronics and Appliance Stores	1	3.1%	2,000	3.9%
Building Supply and Garden Equipment	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	0	0.0%	0	0.0%
Other Retail	2	6.3%	1,200	2.3%
Total Retail	5	15.6%	5,300	10.3%
Food/Drug Retail				
Food and Beverage Stores	2	6.3%	6,000	11.6%
Health and Personal Care Stores	0	0.0%	0	0.0%
Total Food/Drug Retail	2	6.3%	6,000	11.6%
Food Services	7	21.9%	14,500	28.1%
Services				
Personal Services	4	12.5%	1,800	3.5%
Personal Services - Beauty	1	3.1%	800	1.6%
Financial Services	0	0.0%	0	0.0%
Medical Services	1	3.1%	2,000	3.9%



Professional Services	4	12.5%	6,500	12.6%
Recreation Services	2	6.3%	6,500	12.6%
Other Services	1	3.1%	1,500	2.9%
Total Services	13	40.6%	19,100	37.0%
Total Occupied	27	84.4%	44,900	87.0%
Vacant	5	15.6%	6,700	13.0%
Total	32	100.0%	51,600	100.0%

Source: 360 Collective

Findings

There is over 50,000 sq. ft. of commercial businesses in King St. W. BIA which is relatively a small amount of commercial.

- There are 32 different businesses. The average size of each business is 1,612 sq. ft.
- Services is the largest category. Services account for 37% of the total square footage. This includes both professional services and entertainment/recreational services.
- The most prevalent commercial category is food services. Food services account for 28% of the total square footage. This includes a full range of cafes, lunch places, dinner places, and late evening drinking venues.
- There are two convenience stores that provide access to food and beverage goods. Both carry a wide selection of food and home related items.
- Traditional retail accounts for 10% of the total square footage. These businesses tend to be unique destination stores.
- Vacancy accounts for 13% of the total square footage.
- The retail mix includes a mix of convenience (vehicular, transit, and pedestrian combination) as well as destination and appointment based businesses.
- There is cross shopping between the destination businesses and the other businesses.
- From a customer perspective, there are those who think King St. W. is an extension of Downtown Hamilton and those who think the area is part of their unique neighbourhood.

Business Mix Recommendations

- Create a retail mix wish list to share with City staff for recruitment
- In a post LRT neighbourhood the business mix should target 20% retail merchandise 20% food and drug and 20% food services

The following six pictures are a sample selection of businesses in King St. W. BIA.



Businesses have embraced colour to stand out from others on the busy vehicular street



More bold colours for the businesses



The heritage character of the street is enhanced



The businesses maintain an intimate feel



New businesses and investment is happening along the street



National chains help to draw visitors to the area

7.1 King St. W. Area Retail Rents

The following represent active vacant units along King St. W. and nearby.

Local Area Rents

Address	Sq. Ft.	Rent/sq. ft. (gross)	Comments
224 King St. W.	1,000	\$23	
78 George St.	700	\$22.29	
101 York Blvd First Ontario Centre	7,046	\$30	Restaurant opportunity in arena 

54 Queen St. S. 1,000 \$20



Findings

- Rents are relatively high in the local area. Gross rents are above \$20/sq. ft. which is competitive with other areas of the Greater Downtown.



Implications for King St. W. BIA

- The commercial audit revealed a small BIA area caters to a wide range of different target markets including both convenience oriented goods and services and destination businesses.
- Businesses that are successful have sought out new target markets and products/services to gain increased sales.
- As the BIA continues to evolve with increased residential development, King St. W. BIA will evolve into a more local neighbourhood serving business district.
- The businesses will find success by also finding ways to cater to the daytime worker and student population as well as the night time entertainment function (e.g., First Ontario Centre).
- New development including redevelopment must include retail units on the ground floor to maintain and enhance the commercial presence and provide potential spaces for local neighbourhood serving retail.

8.0 Investment in King St. W. BIA



The following tables and charts highlight the current and past investment in King St. W. 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 two active development applications for places in King St. W. BIA.

Development Applications

Application Type	Number	Address	Purpose of Application	
Condominium conversion	25CDN-CONV-15-01	272 King St. W.	To convert 29 rental apt to condominium	
Site plan	MDA-16-080	272 King St. W.	To establish a 56-sq. patio	

Source: City of Hamilton Planning and Economic Development Department



It is noted that the All Saints Church property at 15 Queen St. S. has been demolished to prepare for a proposed 23 story mixed-use condo tower with 212 residential units and a space for the house of worship. There is one retail commercial space on the ground level. This information was updated on this specific property as of June 2017.



Commercial Building Permits

King St. W. BIA Value of Commercial Building Permits

Year	Annual Total	Cumulative Total
2010	\$50,000	
2011	\$500	\$50,500
2012	\$0	\$50,500
2013	\$32,000	\$82,500
2014	\$34,000	\$116,500
2015	\$40,000	\$156,500

Source: City of Hamilton

Findings

- There have been modest but sustained improvements in the commercial businesses in King St. W. BIA.

Grants and Incentives

King St. W. BIA Development Grants, Loans, and Incentives – Commercial and Residential

Year	Actual Cost including CPIG	Downtown Property Improvement Grants (Tax Grant)	Downtown Multi-Residential Property Investment (Loan)
2010	\$0		
2011	\$0	\$333,653	
2012	\$0		\$932,500
2013	\$29,945		
2014	\$32,205		
2015	\$0		
Total	\$62,150	\$333,653	\$932,500

Source: City of Hamilton

Findings

- There has been very limited use of retail commercial grants and incentives. The fact that King St. W. was not a full functioning BIA during some of this period may be related. Developers are using the multi-residential incentives.



Assessed Value

King St. W. BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2010	\$5,286,690	
2011	\$5,691,265	7.7%
2012	\$6,026,840	5.9%
2013	\$6,335,380	10.5%
2014	\$6,623,101	4.5%
2015	\$6,939,726	4.8%

Source: MPAC, City of Hamilton

Findings

- From 2010 to 2015, the assessed value of the commercial areas within the King St. W. BIA has increased from 5% to 10% annually.

Implications for King St. W. BIA

- The continued residential investment in King St. W. BIA and the surrounding area should begin to be matched by commercial businesses making similar investments in their properties to keep them fresh, relevant, and competitive.
- The BIA should work collaboratively with the property owners and businesses on accessing grants and incentives and encouraging re-investment in their businesses.



King St. W. BIA Budget

The budget for the BIA is composed of several elements including the levy against the businesses as well as grants from the City including parking revenue sharing, and other contributions.

The total budget has fluctuated over the years but the levy has remained approximately \$5,000. In some years, the BIA has not been active and has been able to save some money to put towards larger programs such as the new website launch.

King St. W. BIA Budget

	Christmas Grant	City Contribution	Parking Revenue Sharing	Total Grants	Levy	BIA Budget
2010	\$0.00	\$1,634.92		\$1,634.92	\$4,500.00	\$11,000.00
2011	\$0.00	\$1,626.66	\$3,550.59	\$5,177.25	\$4,500.00	\$15,500.00
2012	\$0.00	\$1,586.25	\$3,282.50	\$4,868.75	\$0.00	\$0.00
2013	\$0.00	\$1,520.10	\$3,451.66	\$4,971.76	\$4,500.00	\$6,533.63
2014	\$0.00	\$1,637.87	\$3,298.34	\$4,936.21	\$5,000.00	\$6,373.88
2015	\$0.00	\$1,752.60	\$1,975.15	\$3,727.75	\$5,000.00	\$18,000.00

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 King St. W. BIA. The following represents comments and opinions related to strengths, weaknesses, opportunities, threats, and LRT specific issues and opportunities.

STRENGTHS

Business Outlook

- We are passionate about what we do – it's how we live our lives and what we like to do and that resonates with our target customer
- Could appeal to a better class of customer

Sales Results

- Business is steady and good
- Happy with business
- Have worked hard to build a loyal customer following
- Sales were down but have since recovered
- Sales had been good

New Business Opportunities

- Have to look for opportunities and search out where there are gaps in the marketplace
- Cater to wide range of opportunities such as those commuting home from work
- Change business hours to take advantage of the changing demographics
- Look to add additional products and services to complement what store offers in order to be unique
- Want to bring in new concepts to expand business offering
- There is an evolving customer base that changes throughout the day and weekday/weekend – business should adjust quickly to cater to these changes

Walkable

- King St. W. is very accessible and walkable from Downtown and Main St. W. areas
- Rely on walk by traffic



Customers

- Students who live in the area
- Students who go to McMaster University and Mohawk College find King St. W. area easy to get to
- Local residents
- Office workers in Downtown and in the west end of Downtown including Jackson Square offices and nearby government buildings
- Entertainment
- Hotel visitors
- Visual arts
- Medical visitors
- Get all ranges of customers from young to old

New Residential Developments

- New residents are a positive impact on the BIA sales and opportunities

Hotel

- Get good referrals from Sheraton Hotel but the other two hotels do not send visitors here

First Ontario Centre

- When there are events at the arena (hockey or entertainment), there is a positive impact on retail sales

Hamilton Place

- Some visitors from the convention centre will come to King St. W.

Time of Week

- Weekends are busier
- Friday, Saturday, Sunday busiest

Perception

- Authentic
- King St. W. is the real deal



WEAKNESSES

Parking

- Rely heavily on parking as store is a destination business
- Businesses that rely heavily on parking went out of business when parking changes occurred
- Business was down 20% when bus lanes were installed

Target Markets

- There is a lack of traffic in the mid-afternoon.
- A lot of customers in the area are transient and have no established loyalty (e.g., students, hotel visitors)
- Students and seniors do not have a lot of money to spend
- Office workers only have limited time for lunch and will look for fast and convenient as a main decision factor
- Need more good customers
- Hess Village businesses are not performing as well which affects King St. W.
- The customer demographics are staying about the same, no significant changes – not benefitting from changing demographics in the area

Perception of Crime/Crime

- There have been homicides in the area in the last four or five years (note interviewee acknowledged that this was several years ago)
- Graffiti is an issue
- Attracting the wrong customer base
- Need increased lighting in alley ways
- The “drunk and disorderly” conduct that comes from Hess Village at night is good and bad. The businesses that stay open to cater to this customer target market are contributing to the area's reputation for problems. If businesses stayed closed in the late evening, then these people would not be causing problems on King St. W.
- Issues such as crack and needles are showing up more and more

City of Hamilton

- Do not feel represented at City Hall
- Taxes in the City are very high
- Too much politics in the City of Hamilton

**Beautification and Building Conditions**

- Developers should be required to put up better hoarding around their developments that detracts from graffiti and excessive postering
- Need more than just façade painting – some of these buildings need extensive work to bring them up to code

Complete Streets

- Do not need bike lanes in this area. Where they have gone in before (e.g., Herkimer St.) they have not been used. Also, should convert bike lanes back to traffic during the winter when cyclists do not bike
- Urban Renewal is too focused on creating an image for the area that will just not work
- Hess Village was better in the past before there were excessive rules related to streetscaping, etc.
- See additional comments regarding LRT at the end of this section



OPPORTUNITIES

BIA Goals and Objectives

- Beautify BIA
- Branding to invite outsiders
- BIA expansion to the east
- Member engagement
- New website
- Advertise in brochures and work with accommodation industry
- Update on crime statistics
- Increased advertising to match what Locke St. S. Ottawa St. S. and others are doing
- Cannot be frugal when advertising – need a large ad with business names on it
- BIA needs a planning study

Vision for King St. W.

- Food and entertainment
- Similar to where James St. North, International Village, and James St. S. are but not quite at the same level – lags behind those areas
- Similar to Locke St. S.
- Destination businesses will do well
- Create a colourful exciting look for the area to attract people
- Is BIA part of Downtown or its own neighbourhood

Business Development

- Create more synergies with other businesses
- Create a destination that people want to come to
- Support local businesses – keep it local, source goods from local suppliers
- Other visitors will come when the locals are satisfied – help your own family first
- Need more entrepreneurs
- Need to encourage businesses to have better quality offering
- Some landlords do not appear to want to lease their space, unsure of the reasoning's

**Development**

- Need ideas for vacant land and surface parking lot redevelopment

Facades

- Want to participate in the City incentive programs to fix up building

Downtown Improvements

- As Downtown improves there are opportunities for an improved King St. W.



THREATS

Roadway Changes

- Rapid bus transit killed businesses in the area
- Have moved the business around Hamilton to cater to customers but affected by parking restrictions – may move business again

Business Operation Expenses

- Cost of doing business is increasing and prices businesses can charge is depressed squeezing profit margins

Hess Village

- There used to be more positive impact from Hess Village but that has declined over time.
- Notice that businesses in Hess Village are not achieving similar sales
- Increased vacancy in Hess Village

Competition

- Nations grocery store has affected business – they are undercutting prices
- Compete with Jackson Square – lost some businesses when they relocated to Jackson Square
- The turnaround and positive changes at Jackson Square has negatively impacted King St. W. retail opportunities

LRT ISSUES AND OPPORTUNITIES

- Many businesses are against LRT preferring the status quo
- There is not a clear message regarding LRT moving forward
- Money spent on LRT would be better spent improving the waterfront
- The City should just put in more buses along King St. W. rather than LRT
- LRT construction will put many businesses out of business
- King St. W. businesses will not survive the construction period
- Do not believe that new customers will be coming to the area from the switch to LRT
- Have not determined how many parking spaces will remain on King St. W. with LRT
- Businesses are worried they will lose parking
- Want City to consider adding Bay St. station back into the plan
- Do not believe that residents will switch from driving to LRT
- At present the buses are not full



10.0 Strengths Weakness, Opportunities, and Threats

The following is the SWOT assessment for research related to all aspects of King St. W. BIA

STRENGTHS

- Core group of loyal visitors
- Growing and changing local demographics
- Easily accessible and convenient to get to – creates traffic 24 hours a day (changing character throughout the day)
- Extension of Downtown
- Destination businesses that draw people and create some synergy with adjacent businesses
- Numerous target market groups nearby to support businesses including office workers, sports and entertainment, hotel visitors, students, night time entertainment seekers, etc.
- Businesses are able to do sales

WEAKNESSES

- Low household income of nearby residents
- High volume of vehicular traffic (this can be a strength and a weakness)
- Large number of visitors who only come once and never return
- Late night activity which will interfere with growing/changing residential population

OPPORTUNITIES

- Businesses do well that go after sales opportunities, who are flexible and nimble enough to adjust and change merchandising based on different times of the day and different days of the week
- Area is evolving to a local neighbourhood serving business district
- Part of the greater Downtown food and experience driven business districts that surround Downtown (e.g., James, St. N., King William St., International Village, James St. S., John St. S., and Hess Village)
- Require new developments on King St. W. to have ground level retail

THREATS

- King St. W. is one of a limited number of access/egress points for Downtown
- Downtown and other restaurant and entertainment/experienced based business districts nearby
- Vrancor – creating a retail district along George St. as well as other properties (e.g., Jackson Square)



11.0 Vision for King St. W. BIA

The following principles are agreed upon for the future vision of King St. W.:

- Maintain area's own distinct identity while acknowledging that King St. W. is part of the Greater Downtown community.
- Acknowledge that the area will have to transition from the current theme of “accessible and convenient” to “local neighbourhood serving” – realise that the transition will have to be phased.
- At most, any strategic plan can only go to 2019/2020 up to the LRT construction. It will be too difficult to fully articulate the post LRT plan (post 2024) as there are still too many variables that are not yet determined that will impact how the BIA can and will function in the future.
- Ascertain whether the boundaries should be expanded to include other west Downtown areas. Within that discussion include pro and con considerations.

Phase I Vision – Accessible and Convenience (2017 to 2019)

- There will be a current mixture of destination type businesses and businesses that cater to a wide range of target markets who are there due to proximity and accessibility. This can be either by vehicle, public transit, biking, or walking.
- King St. W. BIA should use mapping to highlight the centrality and accessibility of the BIA to a wide range of target markets.
- The maps should include major transportation nodes (e.g., Highway 403, Main St. W., Queen St. S., Downtown activity centres, etc.
- King St. W. should position themselves at the centre of all the activity and mobility lines.

Phase II – Hamilton's New Neighbourhood – Post 2019

- Evolve the positioning to focus on local neighbourhood residents while still being central and accessible.
- Create a people focused campaign that tells the stories of people who live there and why they love their new neighbourhood – your home/you're home.
- Include elements of the central location and the hill/rise topography of the area.

Similar districts have used the following key defining characteristics:

South Granville St., Vancouver



The Rise: Focuses on the geographic condition of the street as it rises up from False Creek on the south end of the Downtown area. Connotes the fact that this area is "on the way up", improving, better quality, etc.



High colour contrast and the use of motion



Use of vivid colours for the buildings makes the area stand out and gives it a sense of vibrancy (e.g., yellow, blue, red buildings)

Phase III – Post LRT

- Continue from Phase II and include elements of the new established retail mix and a differentiator – hip, eclectic businesses, cafes and restaurants, local goods combined with some destination businesses.



12.0 Target Markets

Create a strategy that acknowledges the changing nature of the target markets throughout King St. W.

12.1 Primary Target Market

Who Are They

- Local residents including students, young professionals, new families, and empty nesters

Current Experience

- Convenience oriented goods and services
- Home meal replacement
- Limited socializing – pass through area

Desired Experience

- Local street that they can build community around – socialize and meet their friends and neighbours
- Goods and services for their home – food, pharmacy, coffee/tea shop, beauty/hair, bank, home meal replacement, hardware, quick service
- Walkable entertainment – local pub, restaurants to go on dates, restaurants to meet up with friends, restaurants/cafes that have entertainment including small bands, unique movies, local art, pop up craft market
- Work – goods and services that support career advancement such as places where self-employed can work, specialty career clothing, barber shop, hair salon, post work hangout/pub, home meal replacement
- Recreation – places to work out, nutrition supplements, running/biking/sports gear/accessories



12.2 Downtown Workers

Who Are They

- Young professionals working in Downtown Hamilton and nearby Main St. W.

Current Experience

- Lunch with friends for unique items such as Lebanese, Japanese, Mexican, etc.
- Quick and good value

Desired Experience

- Selection – evolving choice
- Good value
- Quality of food
- Healthy – low calorie, sustainable, locally sourced, gluten free, high protein, etc.
- Home meal replacement
- Combination of both fast and community building (e.g., single tables and longer communal tables)
- Wi-Fi, plug-in tables to work on laptops or smart devices
- Solutions to support their career advancement – career networking events
- Will buy career clothing in bulk
- Office support products – bags, briefcases, office supplies, copying services, printing services, mobile devices, etc.



12.3 Sports and Entertainment Attendees

Who Are They

- Attend First Ontario Centre hockey games, concerts, events
- Other events in Downtown

Current Experience

- Stay after work for pre-game meal
- After game/event drinking – associated with where visitors parked (note the abundance of surface parking near First Ontario Centre)
- Increasing choices to go out for fun and entertainment – James St. N., King William, James St. S. International Village, John St. S., Hess Village, etc.

Desired Experience

- To be entertained
- Meet new people – socialize, can accommodate larger crowds
- Extend the memorable experience of the game/event through positive memories



12.4 Late Night

Who Are They

- Local and regional visitors
- Drinking and socializing population
- Single, wanting to socialize, make friends
- Larger groups
- Desire patio experience

Current Experience

- Hess Village restaurants and bars
- Less frequent visitation
- Declining sales
- Compete with other venues including online dating

Desired Experience

- Group gathering places
- Associated with food and experience – Korean BBQ, Dim Sum, Lebanese, All day diner
- Sports bar
- Food and recreation such as ping pong, billiards, bowling, board games, etc.



13.0 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



13.1 Organization and Governance

Challenges

- Limited budget
- Limited interest from membership or volunteers
- BIA boundaries that do not encapsulate what the consumer sees as the commercial district

Recommendations – Organization and Governance

SHORT TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
LRT	<ul style="list-style-type: none">• BIA to come to each LRT meeting with list of issues/questions from membership, discussion of what is happening in next two months, communication points to share with membership, suggestions on who to talk with to resolve issues	<ul style="list-style-type: none">• Attend LRT meetings• Work with City and eventually chosen contractor• Ensure issues such as minimum sidewalk width including building set-backs, parking and/or patio spaces are provided	Yes	<ul style="list-style-type: none">• Immediate



Hire part time staff	<ul style="list-style-type: none"> Develop job description and send out alerts 	<ul style="list-style-type: none"> Experience working with diverse stakeholders as well as either marketing or economic development experience 	Yes – limited initially but could grow the position Small budget increase to achieve results	<ul style="list-style-type: none"> Within four months
Instead of committees develop Task Forces	Develop mandate letters for each Task Force	Four Task Forces – (1) LRT Liaison and communications; (3) Economic Development; (3) Parking and Transportation; and (4) Partnerships	Have to recruit members, primarily property owners	Within four months
Increase budget	Each business should pay over \$500 towards the levy (or more) and as new commercial development is added, increase the budget	Incrementally increase the budget	BIA and City Urban Renewal	Within 2 years
Develop social media policy	Policy in place	Determine when and how you should be replying to social media that affects the BIA and members	BIA	By next AGM
Develop a BIA purchasing policy	Policy in place	Rules and procedures for accountability	BIA	By next AGM



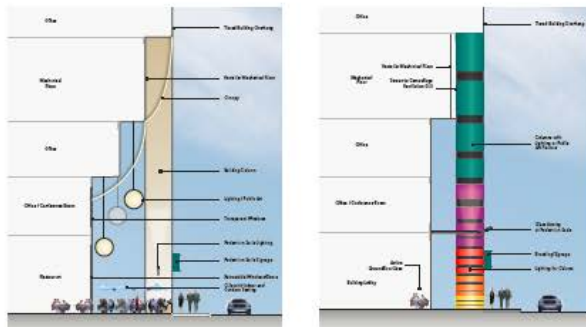
MID-LONG TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
Develop and increase partnerships	Create a package that shows the mutual benefit of working together	Develop partnerships with hotels, Tourism Hamilton, First Ontario Centre, Convention Centre, BIAs, Fire and Safety, LRT, developers, Art Gallery of Hamilton, McMaster University (Downtown and Main), Mohawk College, Downtown Hamilton restaurants, City departments, Downtown Clean and Safe Task Force	BIA and partnership organizations	One year
City Departments – Parking, Transportation, Urban Renewal, Planning		Develop a list of two to three high priority topics to discuss with each department	BIA with City departments	Meet each department twice a year
Expand boundaries and create new name for district	Review expanding boundaries for BIA in all directions (Bay to Locke and Main to York)	BIA should expand only if they want to have an increased organizational capacity for West Downtown growth	BIA and City Urban Renewal	Within 2 to 3 years
City Groups		Develop a list of groups and develop two to three ways that the BIA and the group can work together	BIA and other organizations	2 to 3 years
Succession planning	Business and board succession planning in place	As businesses change over ensure board succession programs are in place	Yes	2 to 3 years

13.2 Economic Development

The BIA will not take a direct lead on economic development initiatives but will work collaboratively with the City and development industry to ensure that the BIA has a voice in the proposals so that they fulfill the agreed upon vision for the area to ensure viable retail commercial spaces and vitality to the public and private realm.

Economic development goals and program includes:

- Support redevelopment of land for higher density, mixed-use development
- Encourage retail commercial on the ground level at a minimum (in some locations encourage second level retail or second level office if residential is located above)
- Determine the mix of sizes of ground level commercial units – mix of primarily smaller units (under 1,500 sq. ft.) but include options for larger stores such as small grocers, pharmacies, pubs/restaurants, etc. – Determine if an urban grocery store is viable
- Review retail uses that are permitted on the ground and upper levels to ensure there is economic rationale for each one
- As allowed by zoning, require/encourage, at minimum, ground and second level setbacks from the lot line to increase the right of way. Within the right of way encourage a choice between either one of the following:
 - Encourage patio development along King St. W. and the side streets to support cafes and restaurants
 - Encourage on-street parking and loading areas.
- If the developer agrees to a set-back, a privately-owned public space (POPS), or other elements that increase the ground level pedestrian realm and street animation, then the City may consider a density bonus.



This scenario increases the sidewalk width so that it can be used for patio space. Ideally the cantilever would work so that no column would be required. Alternatively, the extra space could be used for on-street parking



The setback in this scenario is achieved without the use of columns to support the upper levels. This is more ideal to free up the ground level space for walking and potential patio space or on-street parking

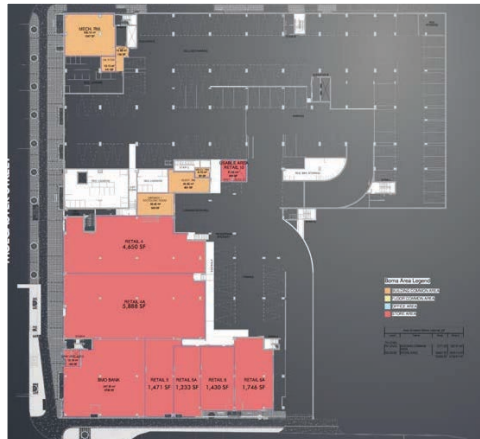
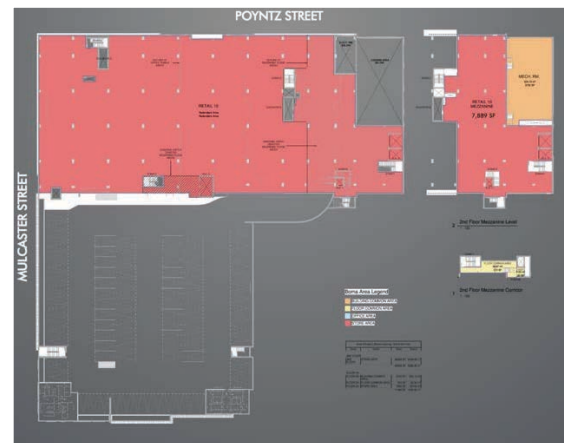
- Goal is to increase density of the area to 8,000 to 10,000 residents within 0.4 km of King St. W. and Caroline St. S. (or higher)
- Determine the ground floor commercial rents required in new development projects that can support the overall capital pro forma program
- Encourage parking spaces for use by all visitors in mixed-use developments
- Entrances – minimum space between entrances should be 7 m to 9 m to create increased ground level retail and competition for businesses
- Minimum ground level retail heights – 4.0 m (min is 3.5 m to 4.5 m)
- Encourage minimum 4.5 m sidewalk or sidewalk/patio or sidewalk/on-street parking from the curb to the building front
- Encourage loading areas that are minimized so that they do not consume large areas of the ground level retail area – on the north side, some loading can be on the lower level due to the topography of the land
- Encourage greater than the required 60% frontage coverage with retail commercial – have residential entrances located on side streets rather than on King St. W.
- If towers are greater than 20 stories, review whether a transfer structure is appropriate in order to minimize the column widths and placement that obstruct retail performance
- Encourage increased usage of City of Hamilton grants and loan programs to help increased mixed-use investment and development
- Discourage column placement at the store front as it limits sightlines into the store



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



KING ST. W. BIA – COMMERCIAL MARKET ASSESSMENT 2017



Recommendations – Economic Development

SHORT TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
Create a retail mix wish list to share with City staff for recruitment	In a post LRT neighbourhood the business mix should target 20% retail merchandise 20% food and drug and 20% food services	Follow up with City staff when inquiries are received about King St. W.	BIA and City Urban Renewal	8 months
Meet with developer and broker to familiarize BIA with basic information – min. ground floor rent, ROI, loading areas, height and density	Inputs that are used by developers in their capital and operational pro formas and the grants/incentives that can be used to make projects financially feasible	Set up learning meetings with brokers and developers Create case studies for development	BIA	6 months



MID-LONG TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
Begin Board discussions on preferred minimum standards for ground level retail	Chart comparing and adding to key design standards	Decide which elements from the Downtown Secondary Plan that King St. W. wants further refinement	BIA	1 year
Educate property owners and businesses on all City incentive programs including those that allow for eligible applicants to receive phase-in tax increases that may results from improvements to property	Review taxes and assessment values on a regular basis with City staff (as part of determining BIA budget and levy)	Arrange for City of Hamilton staff to provide education sessions on inventive programs	BIA and City Urban Renewal	18 months

Business Ideas



Barber shop – caters to high male population. Include socialization elements such as places to chat, have bands playing, offer free pool, provide alcohol



Vitamins, supplements, weight training – caters to high male population. Focused on looking and feeling good. A combination of education/advice and cost conscious would appeal to this market.



Fast casual dining – a set up that includes ample space for single people to get food in a comfortable environment as well as larger tables for social gathering



Cafes, restaurants that have communal tables that provide opportunities for socialization



Cafes and restaurants that cater to students and self-employed to work on projects in a communal setting



Fitness and recreation – studios geared to fitness as well as recreation can include cycling, yoga/pilates, dance, high intensity training, etc.



Pubs that include sports and recreation – ping pong, billiards, bowling, etc.



Urban grocery store – smaller footprint stores such as an urban Longos. The combination of fresh food, semi prepared foods, home meal replacement, and quick takeaway (salad bar and hot table) within 8,000 to 10,000 sq. ft. (even 15,000 sq. ft.) would serve the growing local neighbourhood.



Urban grocer with home meal replacement, meeting and socialization spaces, and quick service food retailing. Entertainment can be added such as music, screens that show movies, t.v., sports, etc.



Pet store and veterinary service – the growth of pet ownership and care continues.



Career clothing – custom, bespoke suits

- Encourage new and innovative activity generator uses that appeal to a younger demographic or a youthful attitude, such as:
 - Music incubator area or other creative industry space
 - Fitness facility, recreation, community centre, game rooms, innovative recreation
 - Community gathering – library, YMCA
 - University campus, art school, shared work environment



13.3 Physical Improvements

Recommendations – Physical Improvements

SHORT TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
LRT	Attend regular scheduled meetings with LRT representatives and communicate back to members	Meet with LRT representatives on a regular scheduled basis with set list of questions and communicate back to membership	BIA and LRT representatives	Immediate and ongoing
Set parking task force to improve parking visibility and usage	Monitor parking revenue	Work with City of Hamilton Parking, Transportation, and Councillor to come to an agreement of increasing parking usage, visitation, visibility, and to slow traffic	BIA and City Parking	Immediate
Increase beautification	Number of benches, light standards, investment in streetscape, etc.	Work with City of Hamilton Public Works and LRT on increasing investment of streetscape to match brand identity and increase pedestrian movement, flow, and dwell time	BIA and City Public Works	Within one year

MID - LONG TERM				
Specific	Measurable	Actionable	Realistic	Time Frame
New developments to take advantage of creating a more enjoyable public realm atmosphere	Number of developments that create improved public realm and pedestrian flow	Work with City of Hamilton when reviewing development applications to ensure that the developments enhance the public realm, commercial accessibility, amount of commercial space, amount of parking and location of parking, etc.	BIA and City Planning	Ongoing



LRT

- Work with LRT, planners, parking, transportation to develop creative ways to add parking into the area. This can include:
 - Requiring new buildings be set back from the lot line to increase the width from the proposed curb to the building (at least the first two levels)
 - Side street parking
 - Determine loading areas on side streets
 - Create a parking garage
 - Limit hours of parking to encourage turnover and ensure parking is utilized by customers

Parking Management

- Hamilton Parking is assessing the requirements for increased technology for using, paying, and enforcing parking rules. Office workers in the Downtown will need to move to a permit system to discourage them from occupying nearby lots
- Many of the surface parking lots in the west end of Downtown may be redeveloped – these spaces need to be replaced through parking structures (above or below ground) in mixed-use developments
- The proposed development at 22 George St. will include nine storeys of parking some of which may be open to the public to help alleviate lost surface parking lots due to redevelopment
- Technology will be able to determine those vehicles that park in the area with high frequency and should be encouraged to get a permit and park in a long-term lot thereby freeing up nearby surface parking for the commercial businesses who rely on constant turnover of the spaces

Beautification

At present, the proposed contract that the City of Hamilton (and province) will engage in will require that the existing landscape and streetscape elements that are in place be replaced as a minimum. King St. W. BIA should work with Public Works and LRT to determine proposed streetscape elements – primarily because they have not been the recipient of streetscape upgrades such as other BIAs (e.g., International Village).

In addition, the BIA should work with LRT planners on the design of the Queen St. Stop to include or incorporate art that reflects their brand and identity.

Once the brand is completed, the BIA should work with City of Hamilton staff on a gateway project. The exact timing may be delayed due to LRT planning. However, it should be included in the planning especially for the street reconfiguration.

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

The City of Hamilton's patio report was recently submitted for review and approved. King St. W. businesses are very dependent on food services from a wide range of different target markets. The reduction of traffic on King St. W. will create an amenable area for patios. As stated, building set-backs should be encouraged to allow for patio spaces along King St. W. (both sides of the street)

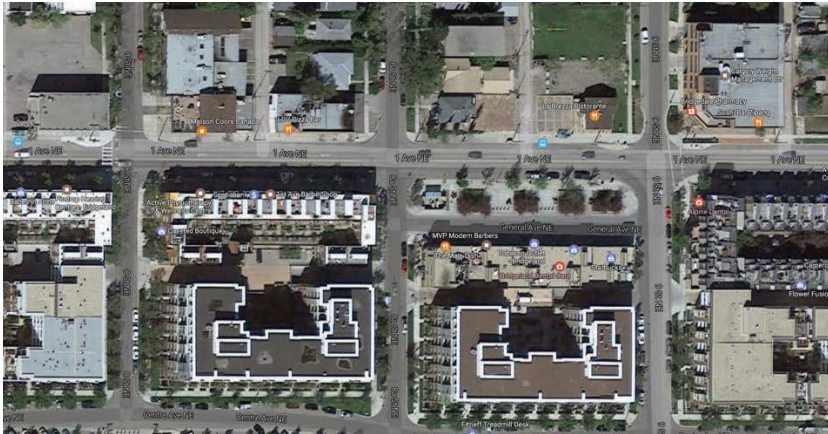
The patios should be made of high quality materials and have a sense of permanence (may be required to remove them in the winter).



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



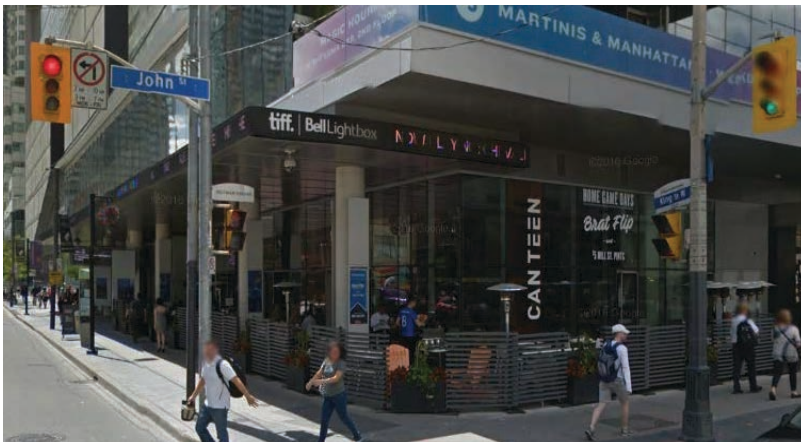
The ground level is set back from the lot line to create additional space for the patio



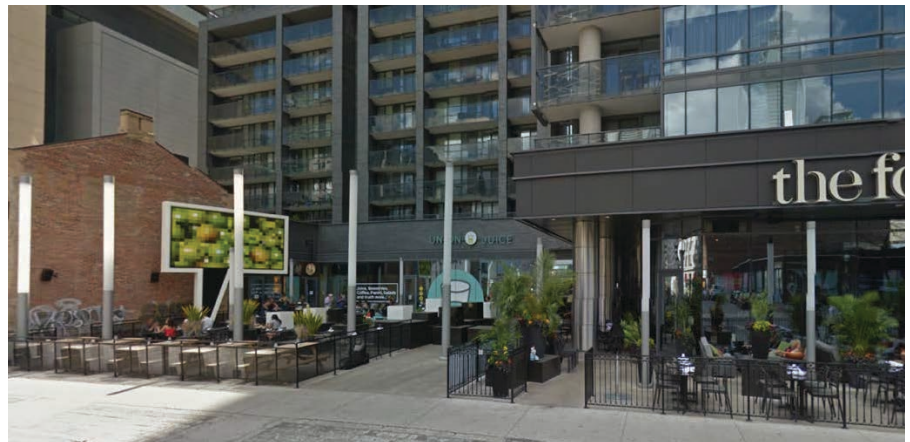
In Calgary, the block between 8th and 9th Ave NE was set back from the street to create a public space, and parking for the retail commercial businesses and patio space



Much needed public gathering space that actually enhances the retail commercial environment can be beneficial



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



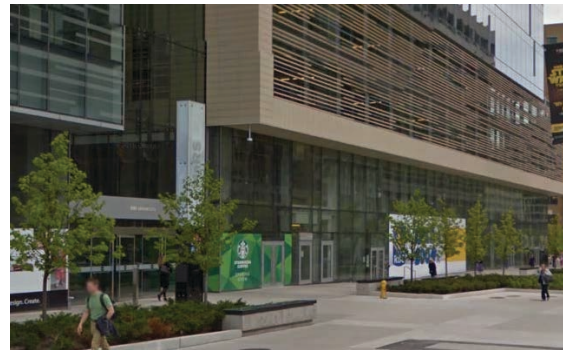
The ground floor is set back to allow for small patio space



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 in order to enhance the patio experience



As stated, alternatively, these set back spaces could be used for on-street parking in a curb less type environment.



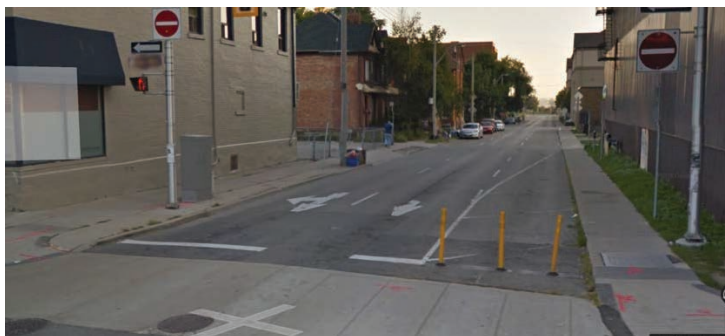
In Downtown Kitchener, the streetscape is set up for the sidewalk to be used either for patio or for on-street parking



Downtown Kitchener

Other Patios

The City of Hamilton should work with the BIA to create animated pop up patios and spaces. This could include the extra space at King St. W. and Caroline St. S.



Ideal location for a pop up patio on King St. W.



Can include public seating, bike racks, landscaping



Can be more sculptural yet also encourage community building and conversation



Can make use of shipping containers for unique people gathering places



13.4 Marketing SWOT

This SWOT is based on reviewing your current marketing activities including your brand identity, website, social media channels, advertising vehicles, events, promotions etc.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Very diverse mix of members offering breadth & depth	<ul style="list-style-type: none">• No positioning• Weak profile of local businesses• Low marketing budget (\$5K)• Unclear who the website is for target audience-wise• No gallery on the "gallery" section of the website• No social media channels
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Take advantage of the evening oriented economy• Take advantage of the boundary change to evaluate your name and brand	<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



13.5 Marketing – Website and Social Media Review

Domain: kingwestbia.com

This Domain was registered Wednesday, October 26, 2016

This Domain expires Thursday, October 26, 2017

Purpose

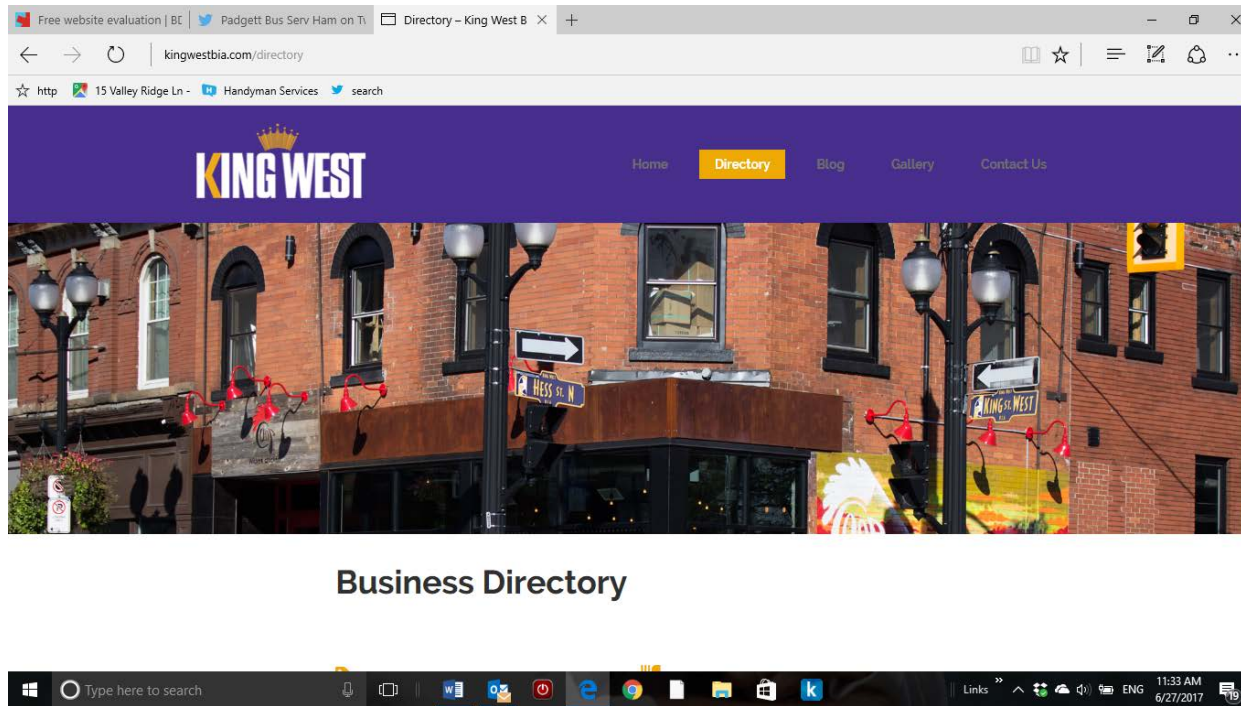
- ☒ The purpose of the website is clear and succinct
- ☒ The content of the site is its primary focus and not overshadowed by advertising
- ☒ The site avoids social bias
- ☒ The site enriches and expands users' imaginations
- ☒ The information on the site is relevant

Content

- ☒ The content is easy to read and understand
- ☒ There is an outline of topics provided allowing users to find topics and move among them easily
 - ①
 - ②
 - ③
 - ④
 - ⑤
- ☒ The spelling and grammar is always correct
- ☒ The information is current and accurate
- ☒ The information is updated regularly

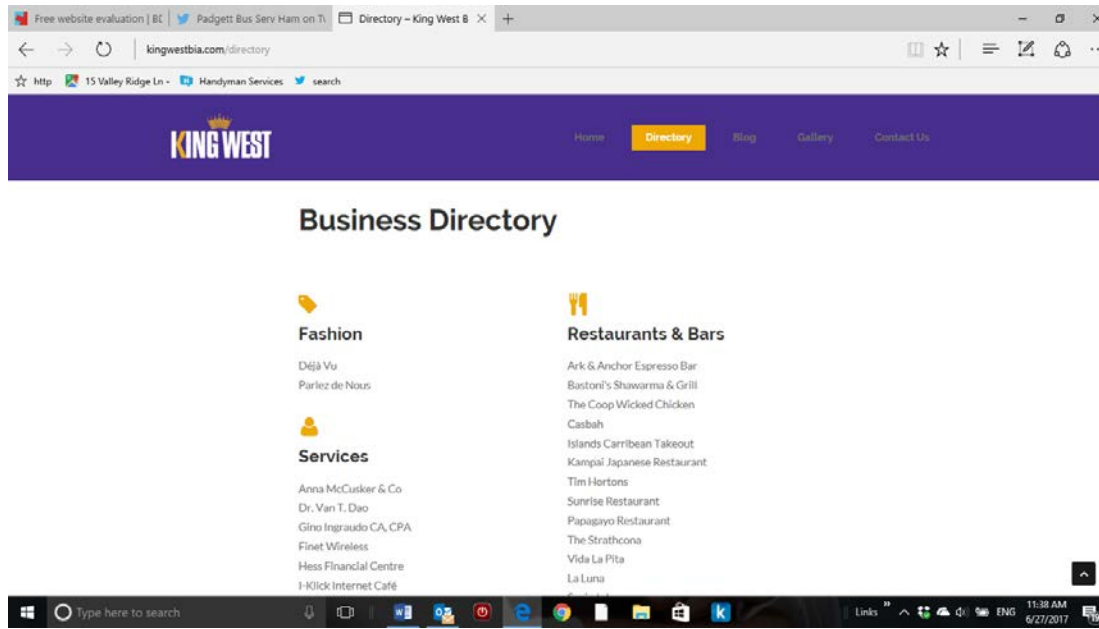
The site is relatively new so nothing is out of date.

There is a link to a blog site but there are no blog postings from the site's creation in October 2016 to June 2017.



- There are only 2 links to the site which makes the site difficult to find and underutilized.
- The graphics used on the site don't show much activation. They show buildings but not much in the way of people.

- ① ② ③ ④ ⑤
- ☒ Graphics are relevant and appropriate to the topic



- ☒ The site offers information that cannot be found anywhere else
- ☒ The site links to the BIA facebook account
- ☒ Each website page has a defined heading

Design

- ☒ The information is easy to use and find
- ☒ The text is easy to read and not cluttered
- ☒ The site design is appealing for intended the intended audience
In general, the website is simple and basic
- ☒ The links pages are well organized
- ☒ The website loads in a reasonable amount of time
- ☒ This website is not optimized for printing
The business directory could be a printable document and generated in real time
- ☒ The website is mobile friendly and easily navigates by mobile phone
The site is not optimized for viewing on a smartphone or tablet

**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/>

Social Media Review

A review of food service ranking sites such as Yelp and Zomato reveal the rankings of King St. W. BIA businesses in all of Hamilton.

Yelp – Top 10 in Hamilton

- Coffee/Tea: Ark and Anchor #3
- Lunch: La Luna #7

Zomato – Top 10 in Hamilton

- No King St. W. businesses were listed in the top ten



13.6 Marketing Recommendations

These recommendations are intended to give you a high level POV on things to consider as you develop your next strategic plan and marketing plan. We recommend that you use the SMART system noted in the appendix to ensure that your planned activities are **specific + measureable + achievable + realistic + targeted**. The exercises referenced in the document are located in the appendix.

BASICS – now	SHORT TERM – 1 year
<ul style="list-style-type: none">• Name change to reflect the boundary change• Brand Blueprint exercise• Tagline review and definition• Target Audience prioritization exercise	<ul style="list-style-type: none">• Update the current website – clean it up, add local photography, update content, manage it monthly• Stronger profile of the Business community – who they are, what they offer, how they are unique• Add an Events Calendar• Evaluate your social media channels and determine what resources you must support them
MID-TERM – 2/3 years	LONG TERM – 5 years
<ul style="list-style-type: none">• Budget development exercise to increase marketing investment• Guerilla marketing campaign to create awareness and engagement	<ul style="list-style-type: none">• Is dependent on the direction of changes related to LRT



14.0 Other Issues - LRT Construction

Other LRT related issues include:

- The BIA needs to engage immediately with the LRT process and planning staff to ensure their voices are heard and that there is an open dialogue between the BIA representing the members and the LRT staff and eventually the team that will design, build, operate, and maintain the system.
- The BIA should commit to regular meetings with the LRT team members with set questions from members that can be answered.
- The BIA will need to have a separate focus for retailers and how to address their concerns and property owners and their concerns. These issues would potentially be completely different and the BIA needs understand potential issues and how to communicate effectively with each group. For this, Three Sixty Collective strongly encourages the BIA to hire a staff person to act as that liaison person.
- Keeping businesses open during construction will be critical. Suggestions include:
 - Ample budget within the construction plan to address marketing
 - Marketing during the entire construction cannot tell the simple message that “Our stores are open”. It requires a dynamic marketing strategy that continually evolves, shows progress, and engages with visitors. There needs to be a strong ephemeral component to the construction marketing campaign
 - Real access to businesses should be utilized as much as possible during heavy construction when front access is completely shut off



15.0 Planning Context – King Street West 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.

15.1 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.

15.2 Official Plan

The planning context for the King Street West BIA is established by the Downtown Hamilton Secondary Plan. It designates King West as a "Downtown Mixed Use – Pedestrian Predominant Area" and as a "Prime Retail Street". The objective is to maintain and reinforce the district's historic role as a Downtown shopping district. This objective is achieved by policies and zoning by-law regulations requiring the ground floor of buildings to be predominantly street-related commercial uses. Residential uses are permitted on upper floors. Auto-oriented uses such as service stations and drive-through facilities are not permitted.



The built-form vision is to complete the street wall and provide an uninterrupted building line at the street level through infill and redevelopment:

- Buildings generally are to be built close to the street line and maintain the traditional building line and height of the street.
- Access to buildings is to be at the street level. Ground floor facades shall have doors and windows open to the street.
- Buildings generally are to be built at the streetline with no setback from the property line (see further discussion on setbacks below in the sections on Zoning and Tall Building Guidelines).
- New driveway access and accessory surface parking are not to be accommodated along the King Street frontage.

Intensification is being encouraged along King St. West:

- New buildings must be at least 3 storeys in height,
- Buildings up to 6 storeys are permitted on the north side of King
- Buildings up to 11 storeys are permitted on most of the south side, except for the half block west of Hess Street where 6 storeys is the maximum.

The Downtown Secondary Plan currently is being updated. Public consultation is underway, and the Planning Department anticipates bringing forward its recommended modifications by mid-2017. Anticipated changes impacting King Street West will add “places of assembly” and “micro-breweries” to the permitted land uses and require that building entrances face the street.

Implications for King St. W. BIA

- 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.
- The Intensification of development will increase the local market for goods and services, supporting the viability and intensification of retail uses at grade.



15.3 Zoning By-law

The Official Plan policies for Prime Retail Streets are implemented by D2 Zoning. The provisions are specified in Section 6.2 of Hamilton's Zoning By-law. Specific regulations are included about permitted and prohibited uses, building setbacks, height and parking.

Implications for King St. W. BIA

Three provisions in the Zoning By-law are noted which could potentially limit an otherwise desirable opportunity in the future.

- **6.2.3.a.i specifies a maximum setback of 2.0 metres for the first storey.** The intention is to reinforce the continuity of the building wall along the sidewalk. From the City's perspective, any increase to this setback would prejudice this character. However, there may be circumstances where a larger setback would enhance the public realm by providing space for street furniture, sidewalk café, landscaping, parking, etc. Any such opportunities may be discouraged by the need to obtain a minor variance or rezoning for more than 2 metres of publicly accessible open space between the building and sidewalk.
- **6.2.e.i limits the location of certain uses** (beverage making establishments, commercial entertainment, commercial recreation, places of assembly, repair services and veterinary services) to the ground floor of buildings facing the street. Most of these uses require considerably more floor space than is available within a typical storefront unit. Therefore, this provision means that their inclusion in Prime Retail Streets is only possible if they occupy considerable expanses of street-oriented frontage, something which runs counter to the objective of animating the sidewalk for pedestrians. Gyms, cinemas, theatres, 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.
- **6.2.g limits the location of Commercial Parking Facilities to the interior of buildings, and the ground floor of the facility facing the street must be used for purposes other than parking.** The policy objective behind this restriction supports the pedestrian-orientation and intensification of commercial uses along King Street West. However, if parking supply becomes an issue in the future, it may 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. While recognizing that a greater focus on the pedestrian is necessary, it is suggested that



parking demand in the King Street BIA be closely monitored, and opportunities to include public parking within mixed use developments in the area be considered and negotiated with private developers.

15.4 Heritage Conservation

The Official Plan designates King Street West a “Heritage Character Zone” to ensure that new development is sympathetic to the area’s early 20th Century commercial architectural heritage. Additional built form requirements are implemented by Section 6.2.c.iii of the Zoning By-law. The specifications include that:

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

276-278 King Street West (the north-west corner of King Street West and Hess Street) is designated a property of cultural heritage value. Should it ever be redeveloped, it will be subject to additional review processes intended to encourage its adaptive reuse and incorporation within the new structure. The Official Plan states that the development of the adjacent property should be sympathetic to its heritage attributes. A similar street orientation, setback, building massing and use of similar exterior materials should be encouraged.

Implications for King St. W. BIA

- The measures supporting heritage conservation will reinforce King Street’s physical identity and differentiation from other commercial districts.

15.5 Tall Building Guidelines

The updated Downtown Secondary Plan will include a Section on guidelines for approving the development of Tall Buildings – defined as structures higher than 11 stories. The guidelines have been drafted and discussed with the public.

Although the maximum permissible height on King Street West is 11 storeys, the Guidelines note that deeper lots potentially offer an opportunity for infill with taller buildings provided that their presence enhances the character of the



area. For example, this was the case with the Coletara Development on the All Saints Church Site at the south-east corner of King and Queen. The guidelines are intended to influence the consideration of rezoning applications for such structures.

Setbacks are addressed in Section 4.2.g which indicates that greater setbacks than permitted by the Zoning By-law may be required if the existing building line does not provide sufficient space for pedestrians. It also states that greater setbacks may be permitted to accommodate additional public realm, including open space, cafes and other amenities. Section 4.2.7 establishes guidelines for “publicly accessible open spaces” – spaces that are privately owned and maintained, but are accessible to the public. They are to be encouraged on tall building sites to complement the public realm and open space network. These will be reviewed on a case-by-case basis.

The “Sidewalk zone” is addressed in Section 5.2. It notes that as redevelopment proceeds in the Downtown, there is an opportunity to complement the existing sidewalks by measures including:

- Integrating design elements such as canopies and arcades for weather protection;
- Incorporating landscape treatment, including public art, furniture and planting;
- Considering additional sidewalk width to improve and ensure pedestrian safety and comfort on wider streets with high volume traffic.

Implications for King St. W. BIA

- The guidelines include policy direction for improving the sidewalk environment for pedestrians when Tall Buildings are developed in the area. It is suggested that consideration be given to encouraging mid-rise development in the BIA to follow these same guidelines where lot depths and building context permit.

15.6 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. However, in the future, the LRT plan along King Street West does not include any parking spaces. This may change in the future with development setbacks that allow for on-street parking or patios.

**Implications for King St. W. BIA**

- On-street patios are popular with the public and help to animate the street and draw people to the area. The availability of the program will be a positive opportunity which the BIA may wish to support. However, in the proposed LRT plan there is no on-street parking. This may change with future redevelopment building scenarios or with side street activation plans. The City of Hamilton and the LRT planning professionals will need to re-assess the patio program in the context of the future retail commercial business opportunities along King Street West, LRT alignment, and right of way widths of the street including building setbacks.



16.0 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 experience oriented, are geared to social gathering and building community, they are 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 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 in order 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