



**Main Street West Esplanade BIA**  
**Commercial Market Assessment Update**

**July 2017**

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MAIN WEST  
ESPLANADE



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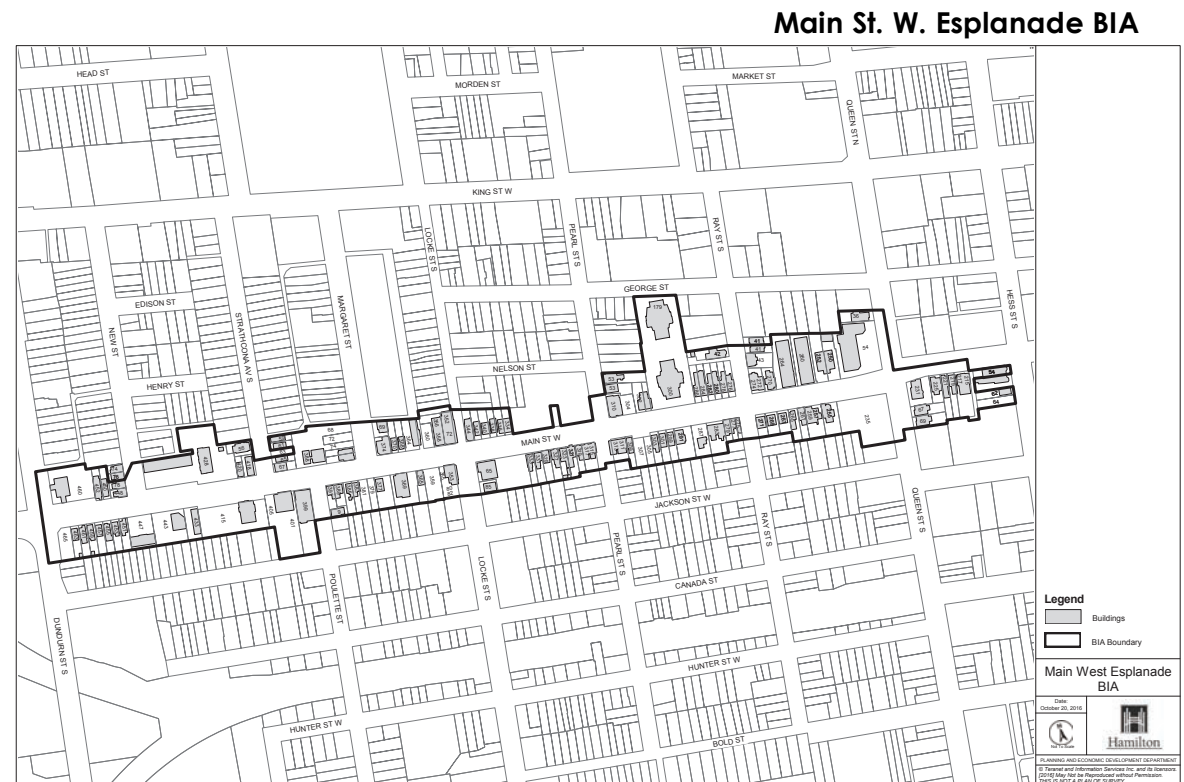
## 1.0 Introduction

360 Collective was retained by the City of Hamilton (City) to undertake a Commercial Market Assessment Update for the Main St. W. Esplanade Business Improvement Area (BIA). The previous update was conducted in 2006. The study process included a thorough review of the demand and supply characteristics of the BIA and provides strategic direction for new action items.

The process included:

- Movement into and through the BIA including visitation
- Commercial audit of businesses in the BIA including photo inventory
- Competitive positioning
- Key person interviews with businesses
- Trade area review including visitor profile using cell phone visitor data
- Review of development applications, building permits, and investment in the businesses
- 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 Main St. W. Esplanade BIA

To understand the commercial market opportunities for Main St. W. Esplanade BIA, a review of visitor movement data was undertaken. This included five major reviews:

- Vehicular movements along Main St. W.
- Visitation assessment through reviewing on-street parking usage
- Pedestrian intersection volumes and movements
- Observational data
- Key person interviews with businesses and property owners

## 2.1 Vehicular and Pedestrian Counts Along Main St. W. Esplanade BIA

### **Vehicular and Pedestrian 8-Hour Counts at Key Intersections along Main St. W.**

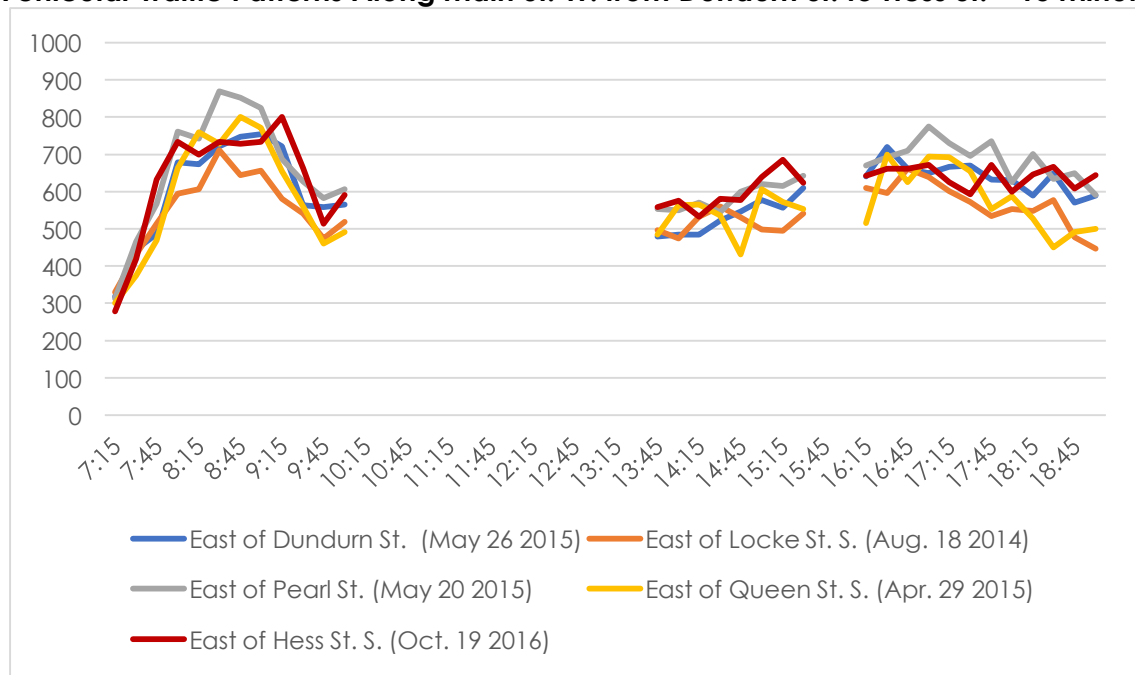
<b>Intersection</b>	<b>Date</b>	<b>8-hour Vehicular Count</b>	<b>8-Hour Pedestrian Count</b>
Main St. W. and Dundurn St.	Tues. May 26 2015	28,249	1,194
Main St. W. and Locke St. S.	Mon. Aug. 18 2014	20,504	760
Main St. W. and Pearl St.	Wed. May 20 2015	21,263	340
Main St. W. and Queen St. S.	Wed. Apr. 29 2015	23,788	558
Main St. W. and Hess St. S.	Wed. Oct. 19 2016	22,823	803

*Source: City of Hamilton*

As vehicular traffic is one-way east-bound along Main St. W., the following graph illustrates the build-up in traffic moving from west to east.



### Vehicular Traffic Patterns Along Main St. W. from Dundurn St. to Hess St. – 15 Minute Intervals



Source: City of Hamilton

### Findings for King St. W.

- Peak traffic occurs at 8:30 am for the morning commute.
- During the morning commute the highest traffic is recorded just east of Pearl St.
- Traffic is relatively stable along the entire Main St. W. study section from the afternoon onwards ranging from 2,000 to 2,800 vehicles per hour.
- There is no major fall off in traffic within the BIA in the early evening after the evening commute ends, rather traffic through the BIA and into the Downtown is sustained past 7:00 pm.



### **Implications for Main St. W. Esplanade BIA**

- Main St. W. is one of the main arteries for the City and gateways to Downtown/Lower City as well as the Mountain.
- It is very accessible and convenient to get to.
- Traffic volumes are high throughout the day. The only peak period is during the morning commute rush.
- Sustained traffic volumes flow through the area in the afternoon and into the early evening period.
- A good measure or indicator is to balance the ratio of vehicles per household (within 500 m walking distance). The lower the ratio the better it is for retail main street vibrancy (20,000 vehicles over an 8-hour period and 1,773 households = 11.3 which is high). By comparison, Concession St. has a score of 5.0, Downtown Dundas has a score of 8.0 but Downtown Waterdown is 20.0.



## 2.2 On-Street Parking

### Parking Meter Revenue

Year	Number of On-Street Meters	Total Parking Revenue	Revenue Per Meter
2008	39	\$1,489.68	\$38.20
2009	39	\$1,540.31	\$39.50
2010*	39	\$2,346.65	\$60.17
2011	39	\$2,600.29	\$66.67
2012	39	\$2,450.89	\$62.84
2013	39	\$2,365.37	\$60.65
2014	39	\$2,784.95	\$71.41
2015	39	\$2,436.50	\$62.47

Source: City of Hamilton

\*reflects an increase in parking rate from \$0.50 to \$1.00 in 2010

### Findings

- There are 39 on-street parking spaces along Main St. W. Esplanade BIA.
- The doubling of the parking rate per hour in 2010 did not result in a doubling of the revenue. As a result, there are fewer people stopping to use the on-street parking after 2010 than before 2010.
- Since 2010, the revenue per meter has remained within a range of \$60 to \$70 reflecting relatively consistent usage but it is important to note that the revenue per meter is very low.

### Implications for Main St. W. Esplanade BIA

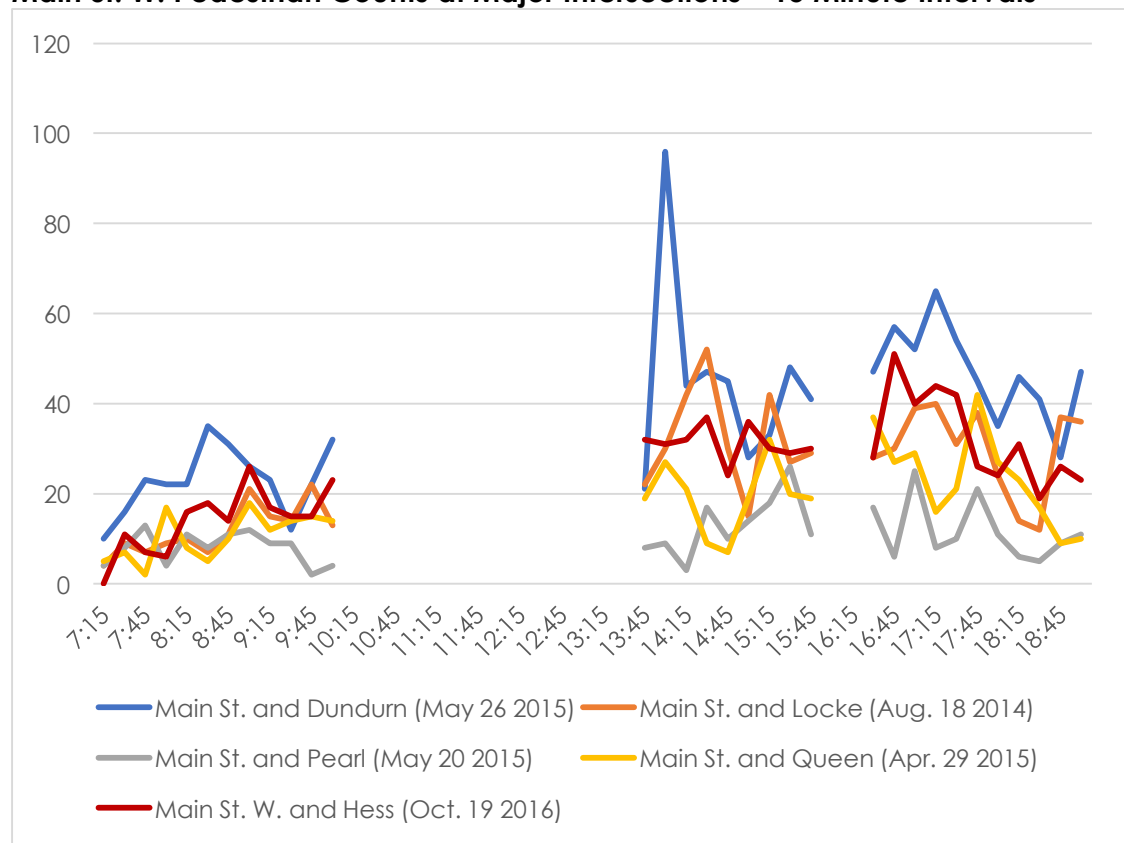
- On-street parking in the BIA is not well defined. There are no pavement markings showing where to park and the meters are set back from the street.
- It is very difficult for Main St. W. Esplanade BIA to function as both a commercial main street and a transportation corridor.



## 2.3 Pedestrian Traffic

Average pedestrian traffic at the major intersections is relatively low during an 8-hour period. The highest intersection volume was recorded at Main St. W. and Dundurn St S.

### Main St. W. Pedestrian Counts at Major Intersections – 15 Minute Intervals



Source: City of Hamilton



### **Findings**

- Pedestrian volumes are low throughout the five intersections in the BIA.
- Main St. W. and Dundurn St S. had the highest pedestrian volume that is generally sustained throughout the entire day. There is a sharp spike at 2:00 pm as well as a morning and evening commute spike.
- There is a noticeable uptick in pedestrian counts in the early evening suggesting a night time economy in the area.

## Main St. W. and Hess St. S. Pedestrian Counts 2008 to 2016 – 15 Minute Intervals

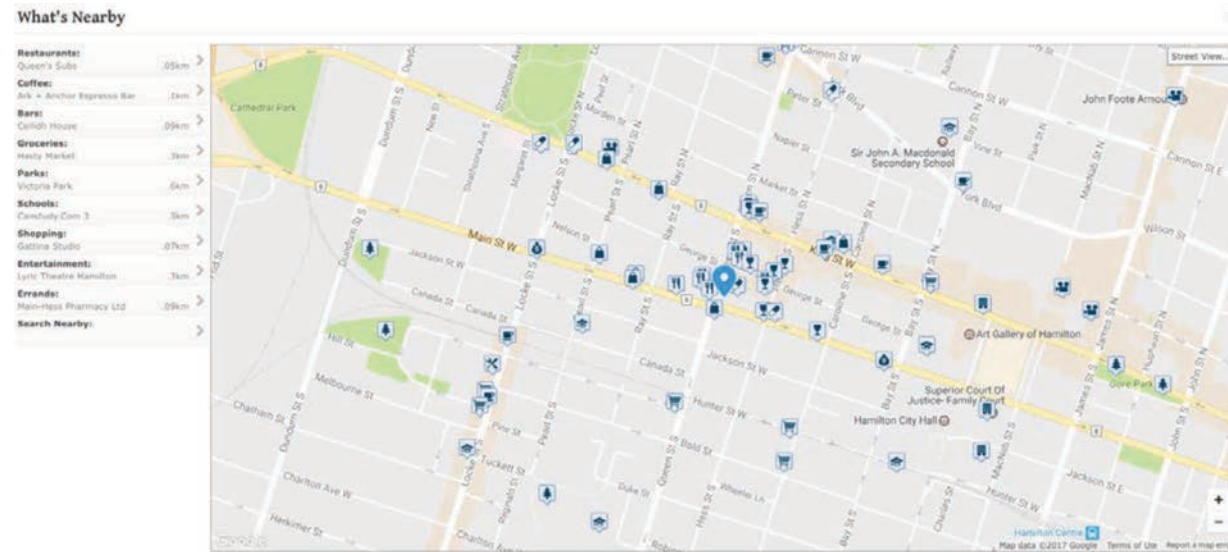


Source: City of Hamilton

### Findings

- From 2008 to 2016, there are fewer early morning commuters and more early evening commuters/visitors.
- As stated, in 2008 there was a drop off in pedestrian traffic after the evening commute. In 2016, there is a sustained flow of pedestrians in the evening relative to the night time economy and increased residential nearby.
- The address 443 Main St. W. has a Walk Score of 91 and an Transit Score of 69. The address 222 Main St. W. has a Walk Score of 94 and a Transit Score of 81. Both are relatively high scores which re-enforces the desirability for residents to live in the area.

## Main St. W. Esplanade – Nearby Amenities



### Implications for Main St. W. Esplanade BIA

- Pedestrian traffic along Main St. W. is sparse.
- The concentration of retail and transit near Main St. W. and Dundurn St. S. creates higher pedestrian volumes.
- There is a growing night time economy that includes more restaurants along Locke St. and the continued draw of Hess Village that is affecting Main St. W. This is also affected by the recent residential developments along Main St. W. such as 140 Main St. W. 150 Main St. W., and 149 Main St. W. The result is increased pedestrian volumes into the early evening.



### **3.0 Trade Area Analysis**

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

- Key person interviews
- Observational data
- Visitation data that correlates postal code data for visitors in the BIA who have one of the registered apps and is in the BIA for a minimum of ten minutes

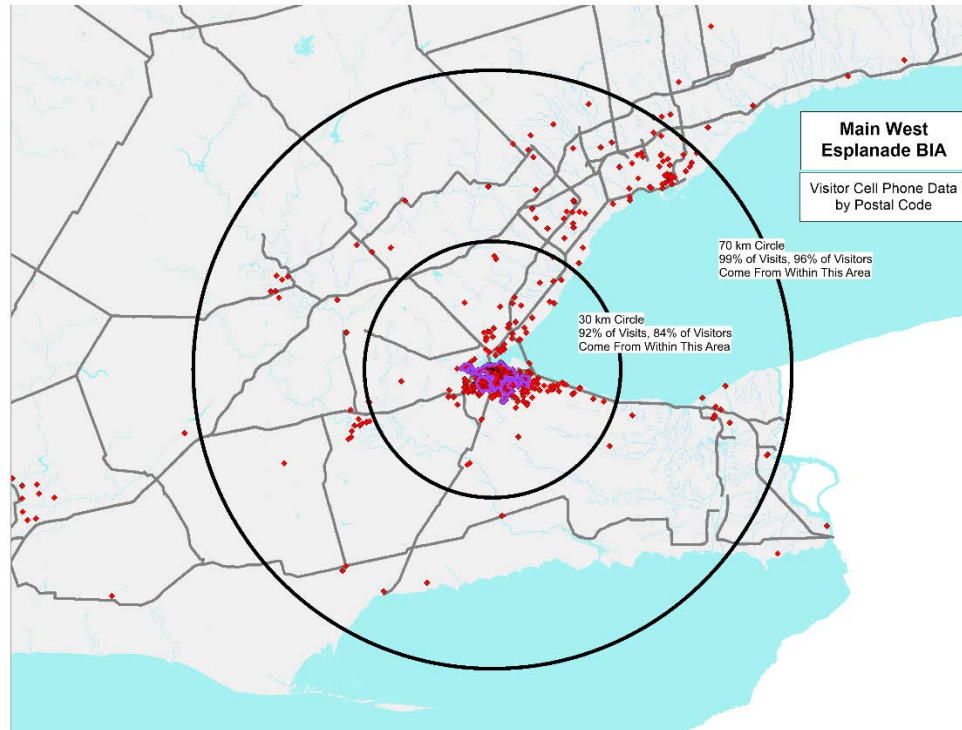
The following section assesses visitor data from cell phone pings over the course of one year.



### 3.1 Cell Phone Data

- Visitors' cell phone ping data was collected from November 2015 to November 2016 (one year) based on people that were in Main St. W. Esplanade 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 Main St. W. Esplanade BIA. The analysis combined with other elements such as observational data, key person interviews, trade area analysis and competitive positioning re-enforced the overall findings.
- The visitor had to spend more than 10 minutes in the BIA for them to be recorded. As a result, commuters, were excluded.
- In total, there were 4,725 total visits from the sample of visitors. Within that sample, 984 were unique visitors. The average visitation was 4.8 times/year, which is very frequent.
- The range of home postal codes for the ping data is very extensive across the Greater Golden Horseshoe and Southwestern Ontario but most visitation is from the local area.
- This was an early testing stage with Main St. W. Esplanade 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 matched well against the visitor profiles and tended to be an accurate portrayal. As with any sample, it is 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.

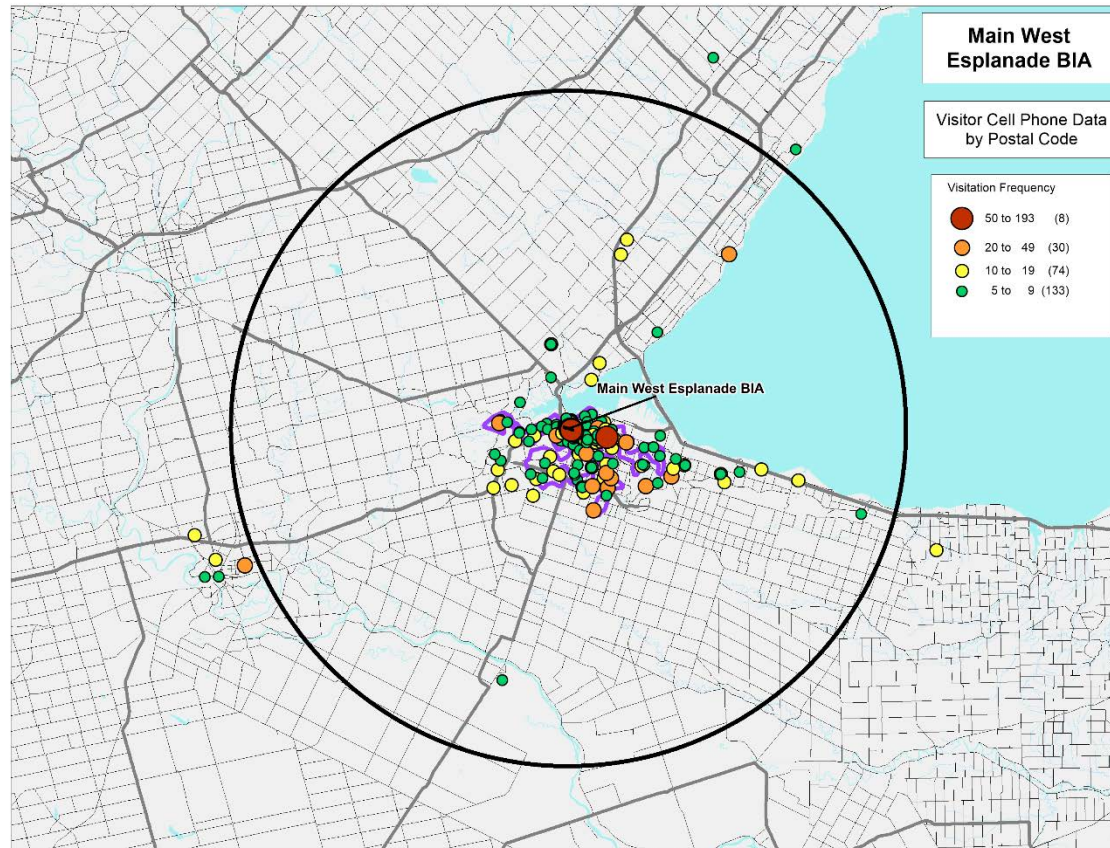
## Main St. W. BIA Cell Phone Ping Data Postal Codes – November 2015 to November 2016



Source: GeoMarketing Solutions



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

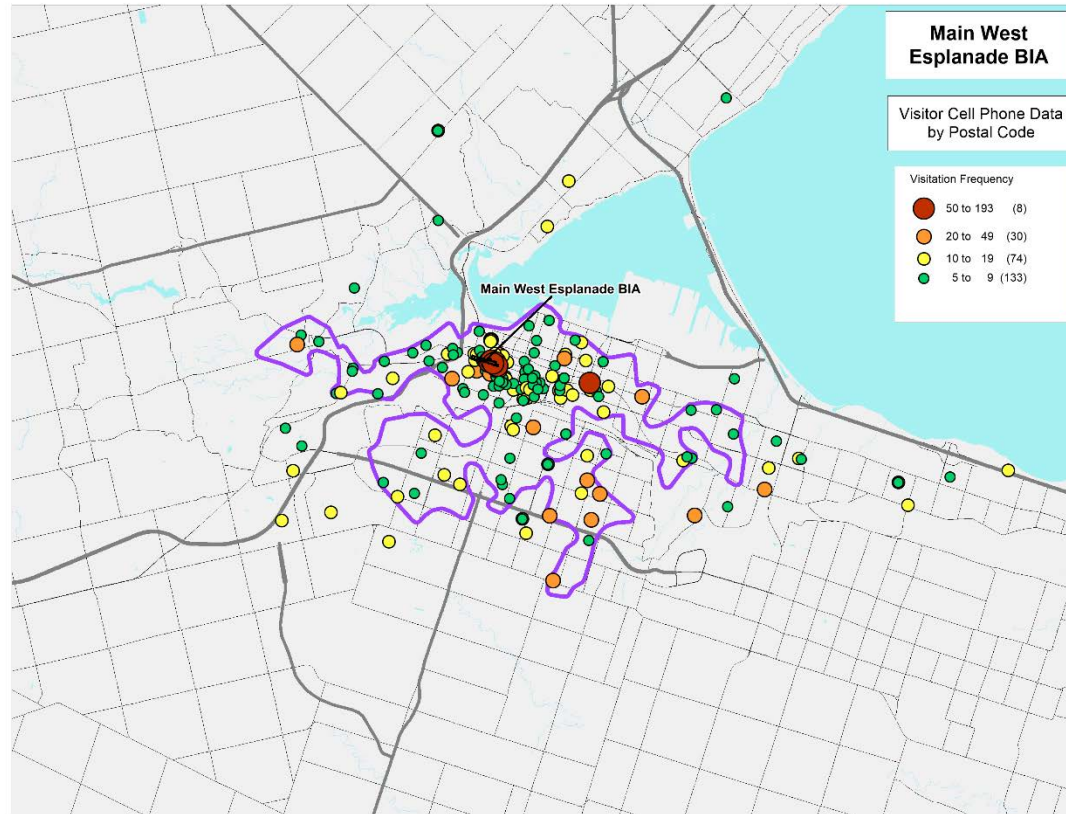


Source: GeoMarketing Solutions – excludes those who visited less than five time per year





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



Source: GeoMarketing Solutions - excludes those who visited less than five time per year



### Main St. W. BIA Sample Visitation Frequency – November 2015 to November 2016 (One Year)

	Number of Visitors	Average Distance Travelled	Average Household Income	Median Age	% Some University or Higher
<b>5 Minute Walk Time Trade Area</b>			\$50,914	38.3	46.1%
<b>West Downtown Trade Area</b>			\$49,590	39.3	42.3%
<b>Visitation Frequency</b>					
Frequent Visitors (100 + Visits)	2	0.32	\$29,743	36.50	30.90
All Visitors Less Frequent	979	16.37	\$76,073	40.01	30.43
1 Visit	391	23.06	\$80,297	39.94	30.77
2 to 5 Visits	393	14.60	\$75,681	39.94	30.19
6 to 12 Visits	125	7.46	\$70,167	39.07	30.96
13 to 24 Visits	46	5.75	\$75,541	42.42	29.54
25 to 49 Visits	18	3.95	\$51,975	44.34	27.23
50 to 99 Visits	6	0.87	\$37,900	34.95	31.07
<b>Time of Day</b>					
6 am to 10 am	194	14.27	\$76,605	40.50	33.20
10 am to 2 pm	363	14.49	\$74,238	40.74	30.47
2 pm to 6 pm	459	13.60	\$73,271	40.15	30.95
6 pm to 10 pm	444	13.80	\$73,138	39.65	30.00
10 pm to 2 am	338	11.35	\$68,744	39.74	29.37
<b>Weekday/Weekend</b>					
All weekday	814	15.63	\$75,808	39.96	30.59
All Weekend	536	13.37	\$72,258	40.04	29.83

Source: Geomarketing Solutions

### Findings

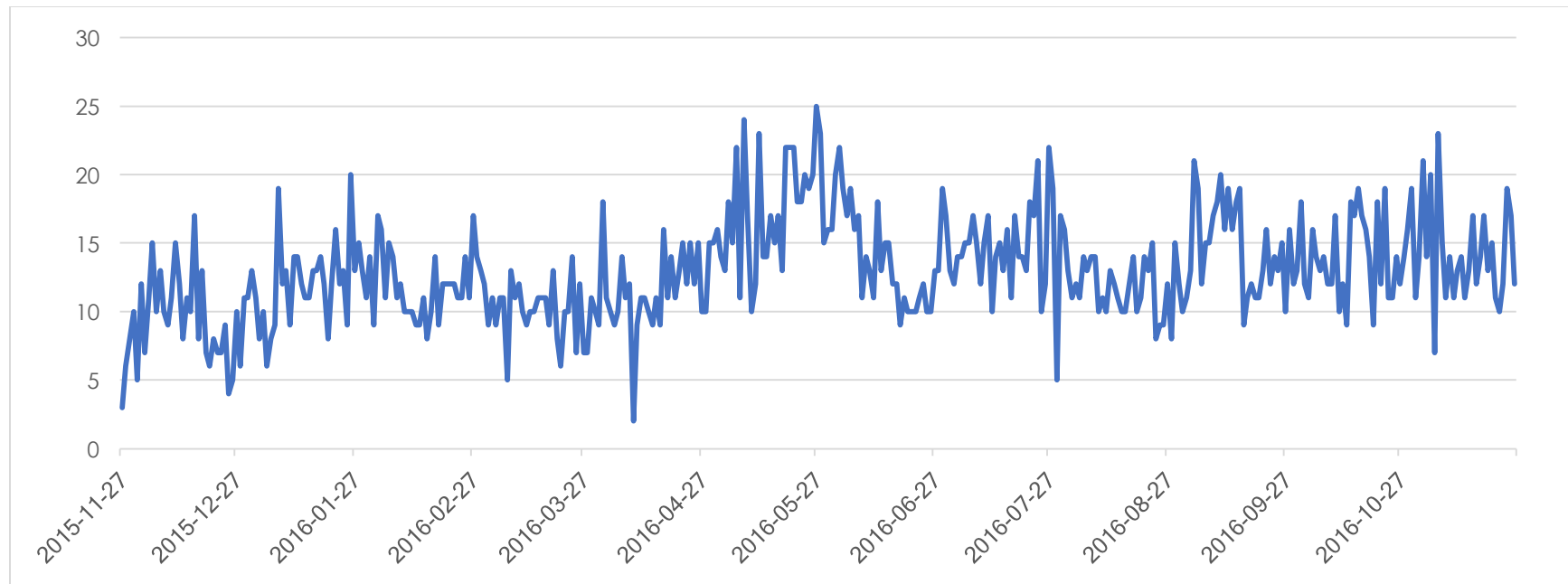
- The sample of all visitors to Main St. W. Esplanade BIA includes frequent visitors who live immediately adjacent as well as single trip visitors who travel on average 23 km. Average household income of all visitors is higher than the local trade area but still below the City of Hamilton's average. There is a combination of young visitors including students and young professionals as well as older visitors. Local residents tend to include a high proportion of students and urban professionals. However, visitors tend to be well educated in comparison to the City of Hamilton.



- Those visitors who visited only once, tend to come from a greater distance, have medium to high household income and tend to be younger.
- Generally, visitation is very localized. There is frequent visitation from elsewhere in the City including the east end of the Lower City and the east end of the Mountain.
- Visitors during the morning commute have the highest average household income and the highest percentage with a university degree or higher. This would include a high proportion of professionals commuting into Downtown.
- During the day from 10:00 am to 6:00 pm, visitors to Main St. W. Esplanade BIA tend to be similar. They have moderate household incomes and come from relatively close by.
- During the evening, the median age falls as the area transitions as a place for students and young adults to visit. During the late evening, the median age lowers again along with average household income and those who have a university degree.
- Weekday visitors have a higher average household income compared to weekend visitors due to office workers in the area.



### Main St. W. Esplanade Visitation by Day – November 2015 to November 2016



#### Findings

- High visitation occurred during the spring and fall of 2016. This appears to coincide with college and university.
- High visitation days include; May 6 to 8 (Fri. to Sun.); May 12 (Thur.); May 19 to 21 (Thur. to Sat.) May 27 to 28 (Fri. to Sat.); Jul. 27 (Wed.); Sep. 3 (Sat.); and Nov. 6 (Sun.). Clearly the extended weekend period in May has some of the highest visitation. In addition, beginning in early September and throughout the fall, there is good visitation.



### **Main St. W. Esplanade BIA Day of Week Visitation**

<b>Day of the Week</b>	<b>Sample Visitation</b>
Sunday	697
Monday	634
Tuesday	649
Wednesday	675
Thursday	689
Friday	707
Saturday	674
<b>Total</b>	<b>4,725</b>

### **Findings**

- Friday has the highest visitation.
- Sunday has a high visitation but it could be part of the late Saturday function for later night activities.

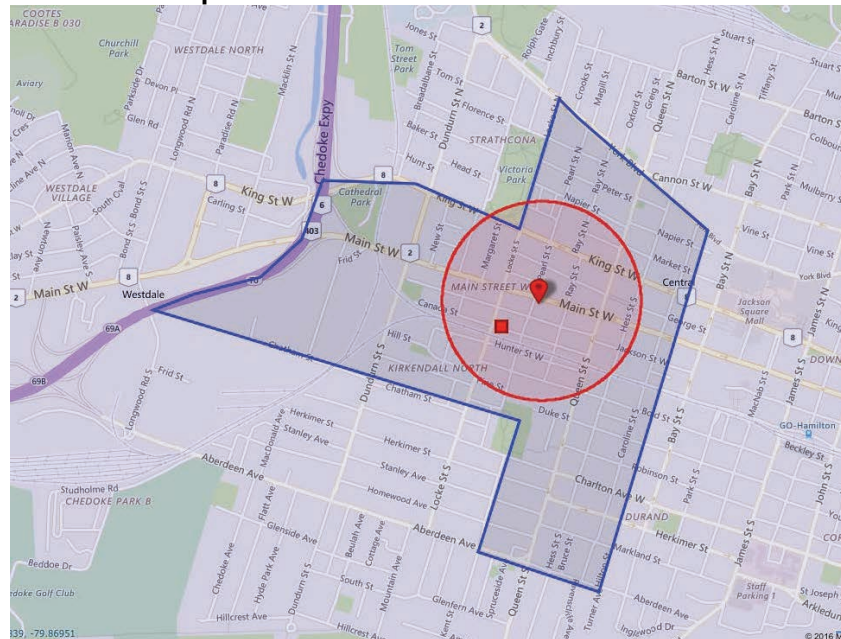
### **Implications for Main St. W. Esplanade BIA**

- Visitors include a combination of:
  - Single purpose visitors who come approximately once a year
  - Commuters who stop for quick convenience items
  - Local residents including students and young professionals
  - Regional visitors for drinking and destination shopping

## 4.0 Trade Area Socio-Economic Review

Based on the preceding analysis to determine the relevant trade areas for Main St. W. Esplanade BIA the following analysis assesses key findings based on the socio-economic review for the five identified trade areas and benchmarks.

### Main St. W. Esplanade BIA Trade Areas



Trade areas include:

- 5 Minute Walking Distance of Main St. W. and Pearl St. S.
- Immediate – West Downtown Selection
- Secondary – Lower City, Mountain, Dundas, Westdale/Ainslie Woods
- City of Hamilton
- 60-minute drive time



## Population, Households, and Daytime Workers

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
2011 Population	3,134	10,639	31,424	519,950	4,940,729
2016 Est. Population	3,312	11,249	336,131	555,841	5,428,211
Annualized Population Growth Rate	1.1%	1.1%	60.6%	1.3%	1.9%
Households	1,773	6,504	135,142	220,822	2,059,081
Annualized Household Growth Rate	0.6%	0.8%	0.7%	0.9%	1.4%
Daytime Worker Population	1,309	5,061	144,994	228,040	3,002,180

Source: Statistics Canada, Environics Estimates 2016

### Findings

- The population within a 5-minute walking distance of Main St. W. is growing. The addition of new apartments and condos on Main St. W. just east of the BIA contributes to the overall growth. The 2016 estimated population of 3,312 probably undercounts the true population given the fact that 215 units were recently completed. Continued residential development in the area will positively impact Main St. W. Esplanade BIA's ability to generate sales opportunities.
- The population density is not high enough to warrant a significant amount of local serving retail but it is growing closer to that threshold.
- The population growth is higher than the household growth indicating that household sizes are getting larger. This includes couples living together and families having children as opposed to a high proportion of single person households. It is anticipated that aging in place will continue as a small but important trend in the Greater Downtown Area.
- The entire West Downtown trade area for Main St. W. Esplanade has a sizeable population of 11,249 and continued growth prospects from Dundurn St. S. to Stinson and West Harbour areas.
- There are a number of small professional offices located along Main St. W. Esplanade BIA and nearby in Downtown. These workers provide valuable commercial sales opportunities for day-time reliant businesses including lunch, home meal replacement, health supplies, and recreation/fitness venues.



## Age Profile, Gender, and Ethnicity

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
<b>Age Profile</b>					
0 to 9	6.4%	5.5%	10.0%	10.3%	10.8%
10 to 19	5.0%	4.8%	10.6%	11.1%	11.1%
20 to 29	20.8%	21.0%	16.1%	14.8%	14.7%
30 to 39	20.8%	19.8%	13.5%	12.9%	14.9%
40 to 49	12.1%	12.4%	12.3%	12.7%	13.9%
50 to 59	13.2%	13.9%	14.8%	14.9%	14.2%
60 to 69	9.7%	11.1%	11.2%	11.6%	10.3%
70+	12.0%	11.5%	11.5%	11.6%	10.0%
Median Age	38.3	39.3	39.9	40.7	38.9
<b>Gender</b>					
Male/Female	48.9/51.1	50.3/49.7	49.3/50.7	49.3/50.7	49.1/50.9
<b>Ethnicity</b>					
Visible Minority	14.0%	21.0%	20.2%	16.9%	36.8%

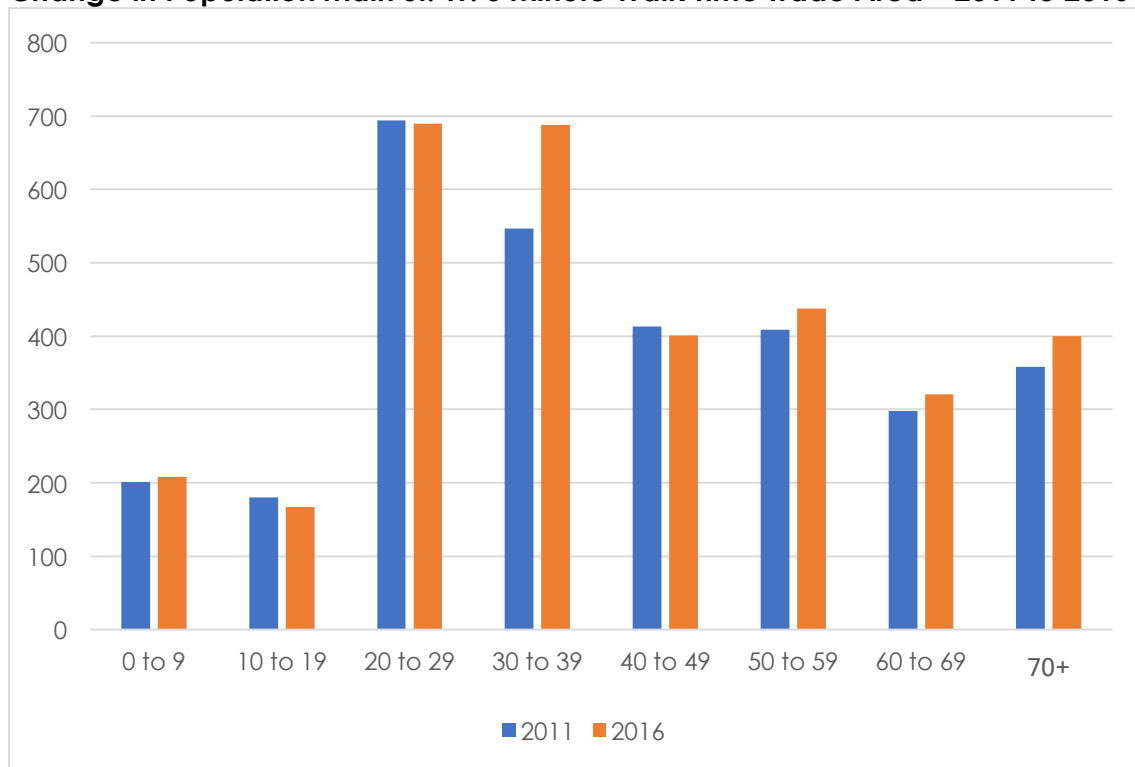
Source: Statistics Canada, Environics Estimates 2016

## Findings

- The population in the immediate area includes both young adults and seniors. 42% of the population is 20 to 39 years of age. In addition, 22% of the population is 60 years or older.
- There is a mixture of both students and young professionals living in the west Downtown area. The convenience and accessibility of the location to both Mohawk College and McMaster University as well as accessibility to Downtown, restaurants, drinking establishments, and cultural places makes this an ideal location for these two target markets.
- As opposed to other areas that cater to students, there is a higher proportion of women to men.
- While smaller in proportion compared to elsewhere, there is a significant number of young children living nearby.
- While in the immediate area there is not a high proportion of ethnic residents, there is in the West Downtown area.



### Change in Population Main St. W. 5 Minute Walk Time Trade Area – 2011 to 2016

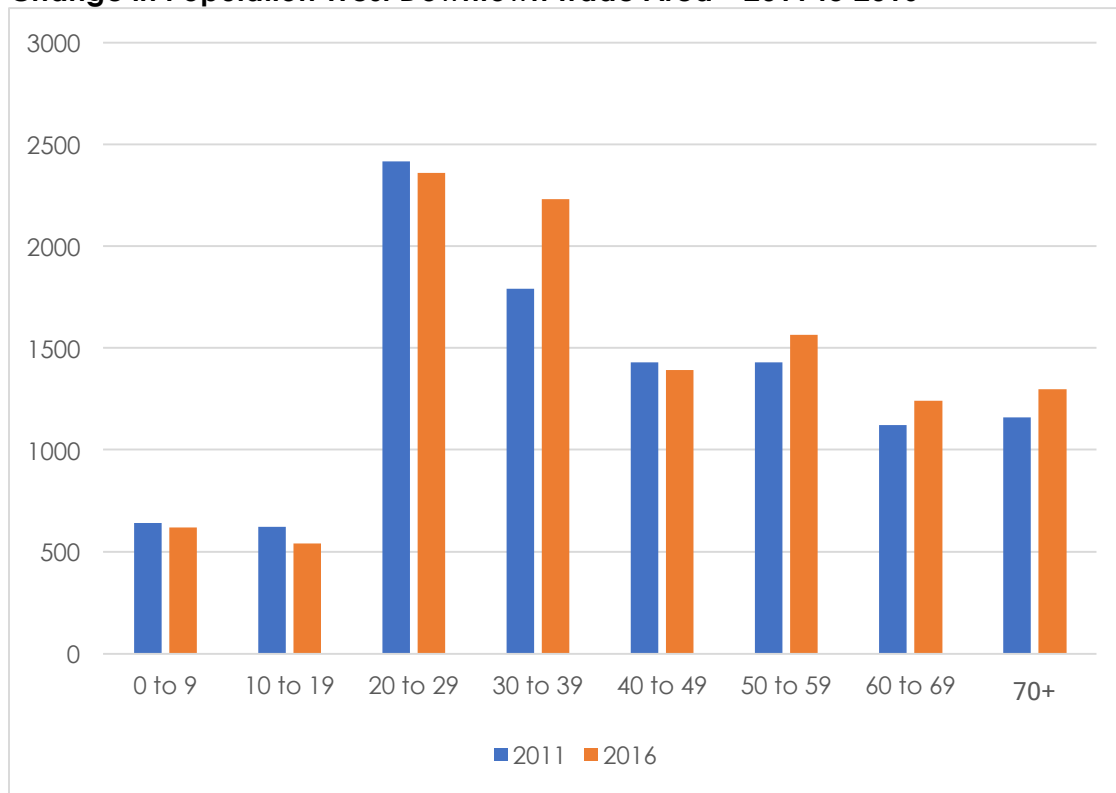


Source: Statistics Canada, Environics Estimates 2016

### Findings

- The largest growth since 2011 is in the 30 to 39 years of age range
- The largest sector remains 20 to 39 year olds. There is very little change in all other age cohorts.

### Change in Population West Downtown Trade Area – 2011 to 2016



Source: Statistics Canada, Environics Estimates 2016

### Findings

- The largest growth since 2011 is in the 30 to 39 years of age range
- The largest sector remains 20 to 29 year olds. There is very little change in all other age cohorts.



## Household Size and Marital Status

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
Household Size					
1 Person	53.3%	59.3%	32.5%	27.7%	26.3%
2 Person	30.8%	27.5%	30.9%	32.7%	29.7%
3 Person	8.9%	7.7%	15.4%	16.0%	16.5%
4 + Person	7.1%	5.5%	21.3%	23.6%	27.5%
Person Per Household	1.74	1.62	2.35	2.47	2.60
Marital Status					
Single	40.3%	41.0%	32.2%	29.3%	30.3%
Married, Common Law	39.0%	36.0%	48.6%	53.5%	54.8%
Separated, Divorced, Widowed	20.7%	23.0%	19.4%	17.2%	14.9%

Source: Statistics Canada, Environics Estimates 2016

### Findings

- Household sizes are small. Over 50% are one person households. As noted previously, the trend is toward larger household sizes as people age in place and larger families (couples) move into the area.
- Correspondingly with the discussion on age, there is a high proportion of singles as well as separated, divorced, and widowed persons.



## Education, Occupation, and Home Ownership

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
Education					
Less than High School	15.3%	17.0%	22.9%	21.0%	18.1%
High School Graduate	15.0%	17.4%	26.2%	26.2%	24.6%
College, Diploma	23.6%	23.3%	27.3%	26.6%	23.1%
University Graduate	46.1%	42.3%	23.6%	26.2%	34.2%
Occupation					
Management	20.4%	19.1%	21.1%	23.2%	27.4%
Science	3.9%	6.4%	6.0%	6.2%	8.2%
Health	6.0%	8.6%	7.9%	7.6%	5.4%
Govt, Ed., Social Services	23.1%	20.6%	12.7%	12.4%	11.7%
Arts, Culture, Recreation	10.5%	6.6%	3.0%	2.8%	3.5%
Sales and Service	24.1%	23.6%	25.2%	23.9%	23.8%
Other	10.8%	13.2%	21.0%	21.2%	17.5%
Labour Force Participation	56.8%	54.9%	56.6%	58.3%	64.6%
Ownership to Renters	36.3/63.7	29.2/70.8	62.5/37.5	69.9/30.4	66.8/33.2

Source: Statistics Canada, Environics Estimates 2016

### Findings

- Local residents are very well educated, including both students and professional workers. This includes government, education, management, and to a certain extent health related professions.
- There is a high proportion of residents employed in arts, culture, and recreation.
- The labour force participation is good especially given that there is a high proportion of students and seniors.
- While it does tend to be a more transient lifestyle including a high proportion of renters, there are indications that more residents are opting to age in place.



## Travel to Work

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
Travel to Work					
Vehicle - Driver or Passenger	66.2%	59.3%	75.7%	81.0%	71.8%
Public Transit	16.3%	21.6%	14.5%	11.2%	19.9%
Walk	14.6%	15.2%	7.5%	5.9%	5.7%
Bike	1.5%	2.1%	1.3%	1.0%	1.5%
Other	1.4%	1.9%	1.1%	1.0%	1.1%

Source: Statistics Canada, Environics Estimates 2016

## Findings

- Overwhelmingly there is a high degree of workers who take a vehicle to work. This is interesting to note given the proximity to Downtown.
- The proportion who walk to work appears relatively low suggesting that many residents do not work in Downtown despite living in close proximity. The accessibility to major highways is another factor why people choose to locate in the west Downtown area.



## Household Income

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
Household Income					
< \$20,000	23.7%	29.3%	13.6%	11.3%	11.2%
\$20,000 to \$39,999	25.9%	24.9%	19.1%	16.2%	14.8%
\$40,000 to \$59,999	20.2%	18.8%	18.5%	16.3%	15.0%
\$60,000 to \$79,999	14.1%	11.5%	14.4%	13.9%	13.3%
\$80,000 to \$99,999	7.0%	5.8%	10.4%	9.2%	11.0%
\$100,000 to \$149,999	9.1%	9.7%	24.0%	31.0%	34.7%
Average Household Income	\$50,914	\$49,590	\$77,558	\$90,192	\$105,305
Real Annualized Growth in Household Income	0.3%	0.1%	0.7%	0.9%	0.6%

Source: Statistics Canada, Environics Estimates 2016

### Findings

- Average household income is \$50,914 which is higher than other West Downtown areas but lower compared to elsewhere in built up Hamilton.
- There is positive movement in real annualized household income growth suggesting that disposable incomes are rising.



#### 4.1 New Residential Developments

##### Recently Completed and Proposed Residential Development

<b>Main St. W. Esplanade Local Area Residential</b>			
<b>Development</b>	<b>Address</b>	<b>Number of Units</b>	<b>Status</b>
149 Main	149 Main St. W.	73	2016
150 Main	150 Main St. W.	142	2016
Bella	140 Main St. W.	322	2016
101 Locke	101 Locke	80	2017
20 George	20 George St.	178	2018
15 Queen	15 Queen St. S.	212	TBD
<b>Total Near Main St. W.</b>		<b>1,007</b>	
<b>Other Nearby Residential</b>			
Tiffany Square	Bay St. N.	164	2016
Beasley	188 Wilson St.	6	2016
Vista	467 Charlton St.	152	2017
220 Cannon	220 Cannon St.	100	2017
Royal Connaught	112 King St. E.	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
<b>Total Other Downtown</b>		<b>1,989</b>	



### **Findings**

- There are 1,007 proposed or under construction residential units within a five-minute walking distance of Main St. W. Esplanade. This will add a further 1,611 new residents to the area within a short period.
- There are other discussed/proposed projects that have not been formalized but include projects nearby.

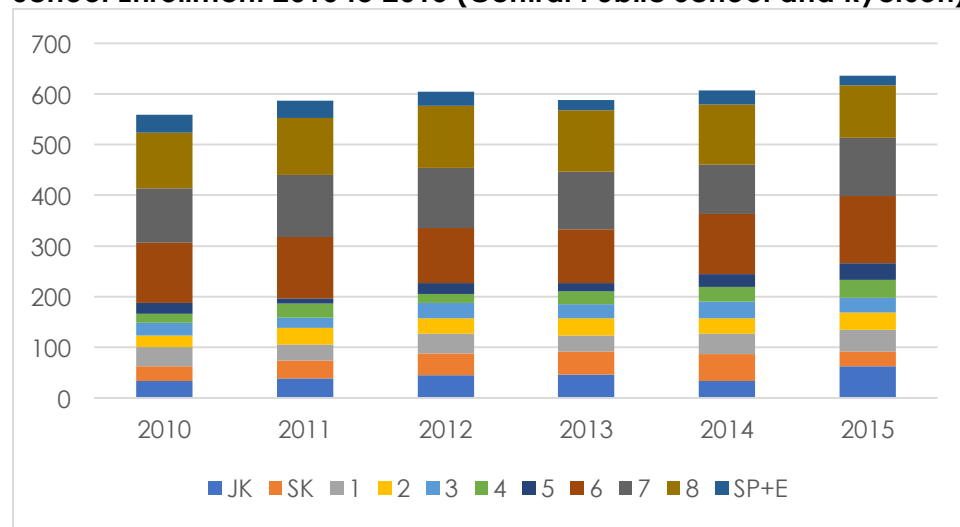




## 4.2 School Enrollment

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 help illustrate if there has been a change in the local demographics related to young families.

### School Enrollment 2010 to 2015 (Central Public School and Ryerson)



Source: Hamilton Wentworth School District

### Findings

- School enrollment has increased from 2010 to 2015 primarily due to increases at Central Public School in Junior Kindergarten to Grade 5.
- This reflects the growing number of young families in the area that may not have been captured in the recent 2016 population estimates for the local area.



### 4.3 Household Expenditure

#### Household Expenditure

	5 Minute Walk Time	West Downtown	Secondary	Hamilton	60 Minute Drive Time
Women's Clothing and Accessories	\$1,075	\$1,041	\$1,732	\$2,006	\$2,288
Men's Clothing and Accessories	\$629	\$592	\$941	\$1,077	\$1,422
Children's Clothing and Accessories	\$30	\$29	\$57	\$62	\$113
Clothing Gifts	\$469	\$49	\$71	\$79	\$72
Furniture	\$885	\$834	\$1,105	\$1,331	\$1,746
Electronics	\$696	\$624	\$796	\$907	\$1,145
Leisure Goods	\$595	\$501	\$751	\$861	\$1,110
Florists	\$204	\$175	\$375	\$445	\$320
Other Retail	\$267	\$254	\$345	\$393	\$297
Food from Stores	\$5,161	\$4,680	\$7,581	\$8,514	\$8,642
Alcohol Purchased from Stores	\$1,152	\$1,026	\$1,389	\$1,546	\$1,604
Food from Restaurants	\$2,827	\$2,389	\$3,181	\$3,582	\$3,917
Alcohol from Restaurants	\$588	\$462	\$469	\$511	\$730
Health and Pharmacy Goods	\$1,531	\$1,400	\$1,221	\$2,364	\$2,496
Personal Care Services	\$487	\$510	\$900	\$983	\$1,189
Packaged Travel	\$267	\$282	\$587	\$797	\$850
Laundry and Dry Cleaning	\$120	\$120	\$107	\$119	\$196
Recreational Services	\$238	\$226	\$393	\$480	\$541
Movies	\$91	\$78	\$89	\$92	\$196
Live Sporting Events	\$58	\$43	\$58	\$71	\$88
Live Performing Arts	\$112	\$83	\$110	\$202	\$163

Source: Statistics Canada, Environics Estimates 2016



## Findings

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

- Alcohol and food eating out
- Laundry services
- Movies
- Sporting events
- Electronics
- Alcohol purchased from stores
- Leisure goods
- Pets and pet supplies
- Furniture and furnishings
- Gifts
- Food from stores
- Men's clothing and accessories

Themes include:

- Eating out
- Going out for entertainment
- Arts and culture
- Staying in for entertainment
- Sports and recreation
- Dressing up for career advancement and dating



## 5.0 Other Major Target Markets and Customer Visitation

The location of Main St. W. Esplanade 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:

- Workers
- 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 include those employees in Downtown Monday to Friday from 9 am to 5 pm. Daytime workers can include office workers as well as retail, hospitality, healthcare, education, 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, 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 workplace environments).

Within the five-minute walk and the West Downtown trade areas for Main St. W. Esplanade BIA, there are 1,309 and 3,752 daytime workers respectively (5,061 less 1,309 = 3,752 excluding the five-minute walk time workers). There is 25,500 sq. ft. of office commercial space proposed for 235 Main St. W. This space could house 140 employees.

This represents over \$2.2 million and \$5.6 million in potential food service sales for a total of \$7.8 million. Main St. W. Esplanade could capture 5% to 10% of these sales accounting for \$390,000 to \$780,000 in breakfast and lunch time sales.



### **Scottish Rite**

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

### **Students**

The West Downtown area 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 (Main St. W., King St. W, and Queen St. S. Intersection).

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.

Nearby to Main St. W. Esplanade BIA is the 192,000-sq. ft. David Braley Health Services Centre which has:

- 560 staff
- Over 4,000 students
- 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 expenditures. The students are not in the Centre full time and will be elsewhere at McMaster. Main St. W. Esplanade BIA could capture a small proportion of this potential sales.



### **Hotels – Overnight Accommodation**

There are four hotels in close proximity to Main 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 Main St. W. Esplanade BIA**

- Businesses need to adjust their merchandising and marketing to appeal to different target markets in the area throughout the day and the week.
- This includes early morning commuters, lunch for office workers, local residents for weekend errands/shopping and brunch, early evening dining, tourist eating, etc.

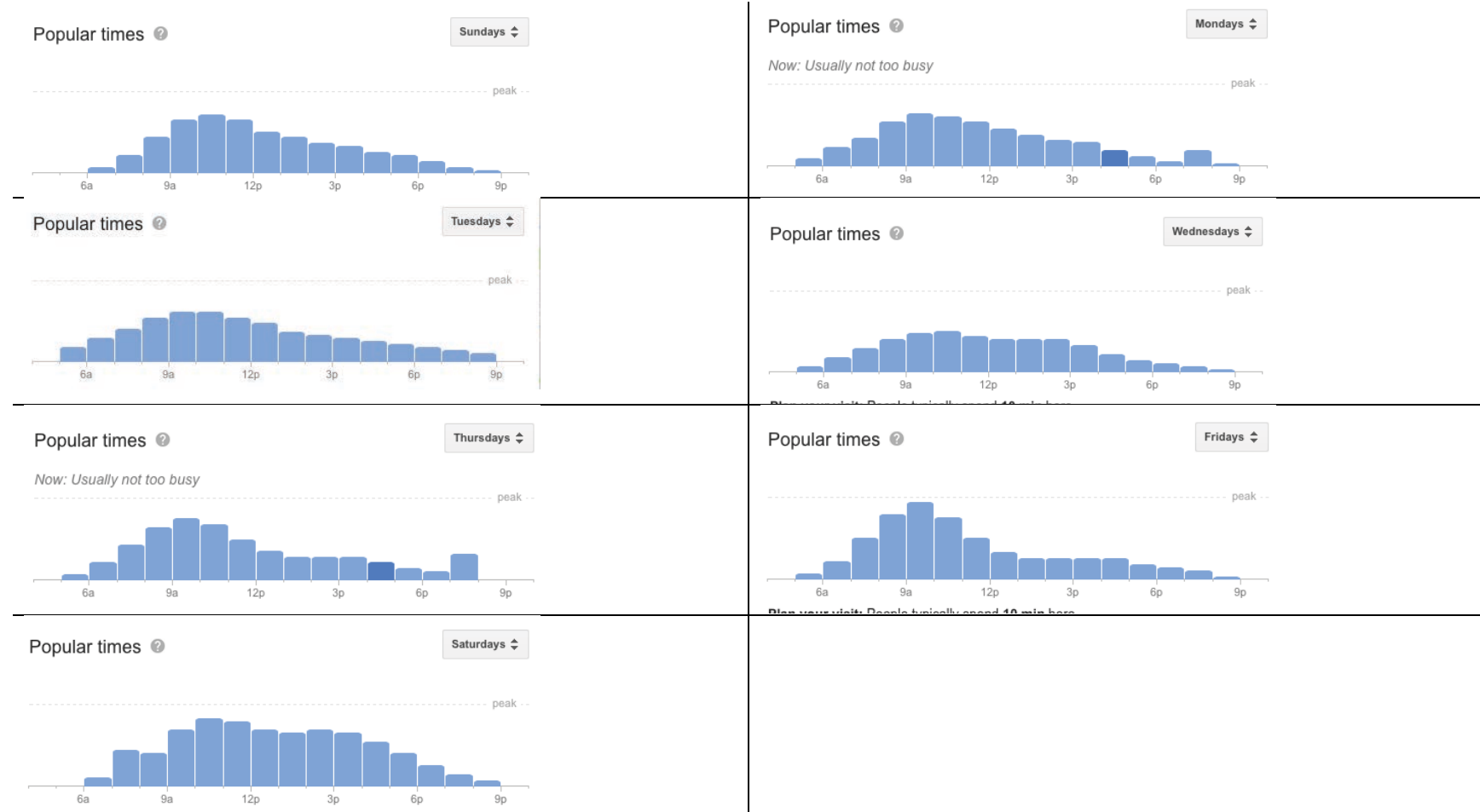


## 5.1 Customer Visitation Data

### Customer Flow Times

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

#### Tim Hortons

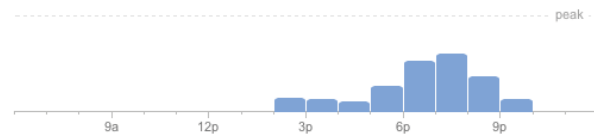




## Alirang

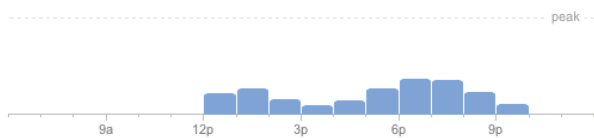
Popular times ?

Sundays ↕



Popular times ?

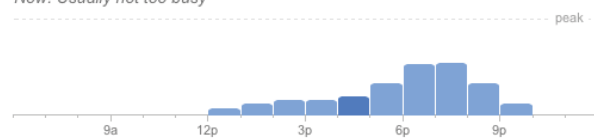
Tuesdays ↕



Popular times ?

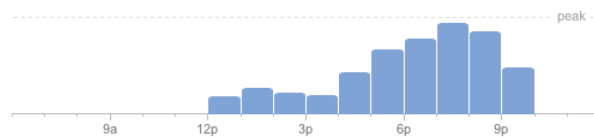
Thursdays ↕

Now: Usually not too busy



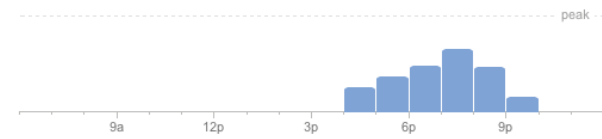
Popular times ?

Saturdays ↕



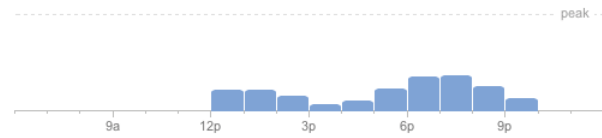
Popular times ?

Mondays ↕



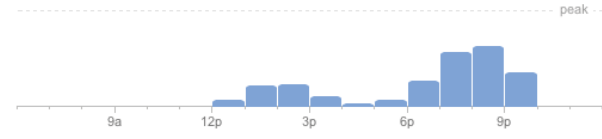
Popular times ?

Wednesdays ↕



Popular times ?

Fridays ↕



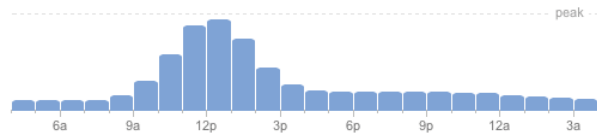




## Wimpy's

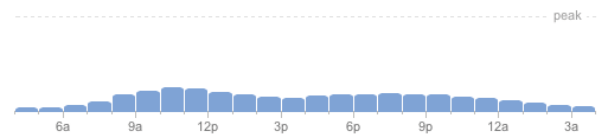
Popular times ?

Sundays



Popular times ?

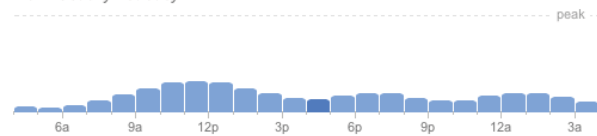
Tuesdays



Popular times ?

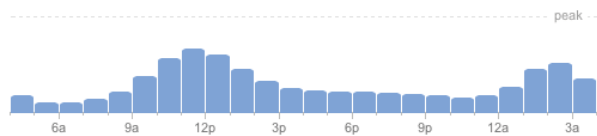
Thursdays

Now: Usually not busy



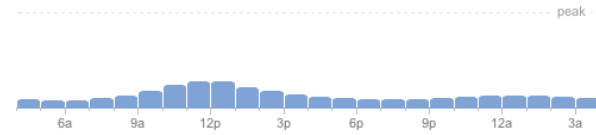
Popular times ?

Saturdays



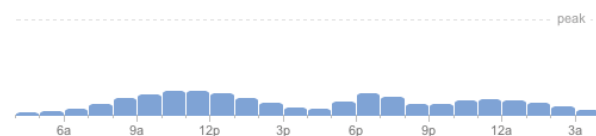
Popular times ?

Mondays



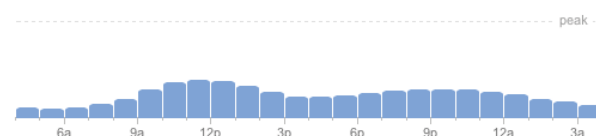
Popular times ?

Wednesdays



Popular times ?

Fridays

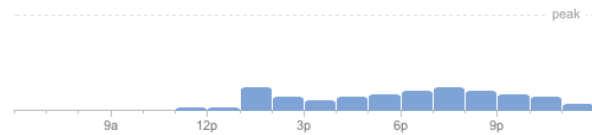




## Hess Village Pizza and Wings

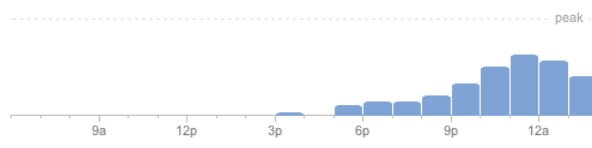
Popular times ?

Sundays ↕



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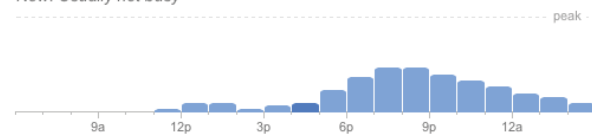
Tuesdays ↕



Popular times ?

Thursdays ↕

Now: Usually not busy



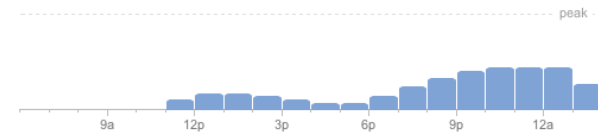
Popular times ?

Saturdays ↕



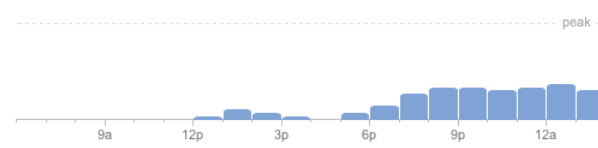
Popular times ?

Mondays ↕



Popular times ?

Wednesdays ↕



Popular times ?

Fridays ↕

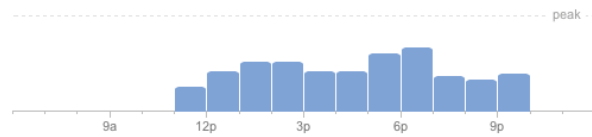




## Dairy Queen

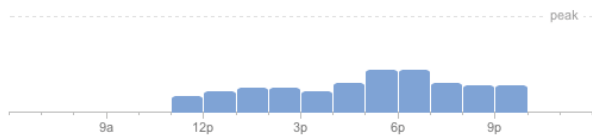
Popular times ?

Sundays ↕



Popular times ?

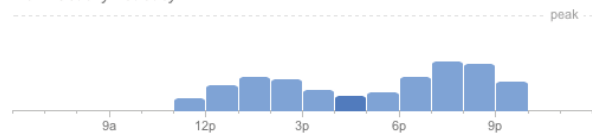
Tuesdays ↕



Popular times ?

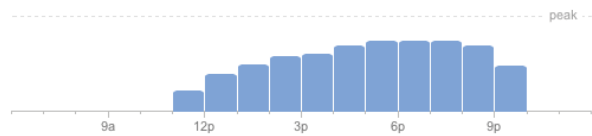
Thursdays ↕

Now: Usually not busy



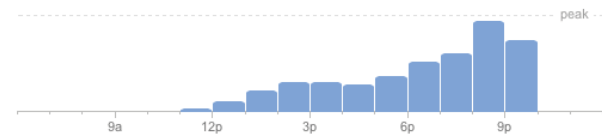
Popular times ?

Saturdays ↕



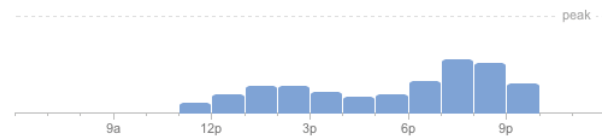
Popular times ?

Mondays ↕



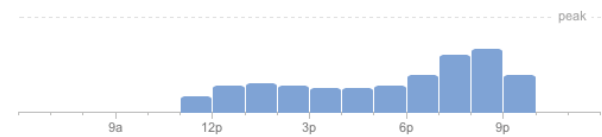
Popular times ?

Wednesdays ↕



Popular times ?

Fridays ↕





## Findings

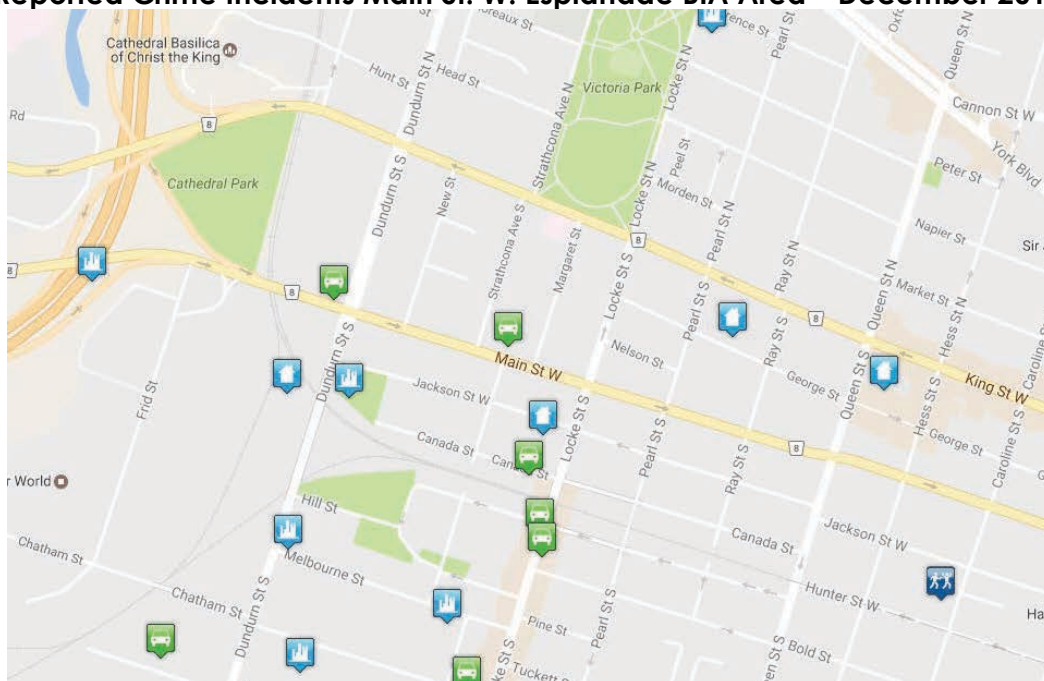
- Peak periods vary considerably for the different food service operators.
- Tim Horton's caters to a morning peak as it is primarily a drive thru business. In addition, there is steady flow of traffic throughout Saturday and Sunday. (It is noted that there are four Tim Horton's in close proximity to Main St. W. and Dundurn St. S.)
- Dairy Queen is an early to late evening place that also has a relatively steady afternoon flow of traffic. It is a dessert replacement/treat place.
- Hess Village Pizza and Wings is a late evening venue catering to the Hess Village visitor throughout the entire week.
- Wimpy's is primarily a weekend brunch place with both a lunch time and evening business schedule.
- Alirang is an evening dinner place throughout the week but there is a small lunch time traffic.
- As stated, businesses in Main St. W. Esplanade need to be flexible to accommodate different target markets and their shifting needs that occurs throughout the day and week. These food service type businesses need to develop two strong peak periods to be sustainable businesses.

## 6.0 Quality of Life Statistics – Crime Statistics and Housing Prices

### 6.1 Crime Statistics

Within the immediate trade area of Main St. W. Esplanade 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 areas of Hamilton.

#### Reported Crime Incidents Main St. W. Esplanade BIA Area – December 2015 to November 2016



Source: Hamilton Police Services



Auto Theft



Robbery – Individual



Robbery – Commercial



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.

Over a five-year period, 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**

<b>Year</b>	<b>Average House Price</b>	<b>Year-Over-Year Change</b>
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*

- As stated, there is increased residential pressure throughout this area of Hamilton.



## 7.0 Commercial Audit and Rent Review

An audit of the commercial businesses in Main St. W. Esplanade 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).

### Main St. W. Esplanade BIA Commercial Audit – November 2016

	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>				
Clothing and Accessories	3	5.6%	10,000	9.6%
Furniture and Home Furnishings	1	1.9%	1,200	1.2%
Electronics and Appliance Stores	0	0.0%	0	0.0%
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	3.7%	2,300	2.2%
<b>Total Retail</b>	<b>6</b>	<b>11.1%</b>	<b>13,500</b>	<b>13.0%</b>
<b>Food/Drug Retail</b>				
Food and Beverage Stores	3	5.6%	5,000	4.8%
Health and Personal Care Stores	0	0.0%	0	0.0%
<b>Total Food/Drug Retail</b>	<b>3</b>	<b>5.6%</b>	<b>5,000</b>	<b>4.8%</b>
<b>Food Services</b>	<b>7</b>	<b>13.0%</b>	<b>14,500</b>	<b>14.0%</b>
<b>Services</b>				
Personal Services	3	5.6%	3,000	2.9%
Personal Services - Beauty	4	7.4%	5,700	5.5%
Financial Services	2	3.7%	5,500	5.3%
Medical Services	11	20.4%	18,700	18.0%
Professional Services	13	24.1%	30,400	29.3%



Recreation Services	2	3.7%	5,000	4.8%
Other Services	0	0.0%	0	0.0%
<b>Total Services</b>	<b>35</b>	<b>64.8%</b>	<b>68,300</b>	<b>65.8%</b>
<b>Total Occupied</b>	<b>51</b>	<b>94.4%</b>	<b>101,300</b>	<b>97.6%</b>
<b>Vacant</b>	<b>3</b>	<b>5.6%</b>	<b>2,500</b>	<b>2.4%</b>
<b>Total</b>	<b>54</b>	<b>100.0%</b>	<b>103,800</b>	<b>100.0%</b>

Source: 360 Collective

### Findings

There is approximately 100,000 sq. ft. of commercial businesses in Main St. W. Esplanade BIA which is spread out over a long street front of 3,000 ft. (920 m).

- There are 54 different businesses. The average size of each business is 1,922 sq. ft. which is higher than other business districts. There is a mixture of stand-alone commercial businesses, main street businesses, residential spaces that have been converted to commercial, as well as a commercial plaza.
- Services is the largest category. Services account for 66% of the total square footage. This includes both medical, professional services and entertainment/recreational services as well as personal services.
- The most prevalent commercial category is food services. Food services account for 14% of the total square footage. This includes a full range of fast food, cafes, lunch places, dinner places and late evening places.
- Food and beverage accounts for a small proportion and is related to convenience stores.
- Traditional retail accounts for 13% of the total square footage. There is a mixture of destination apparel stores.
- Vacancy has decreased to account for 2% of the total square footage.
- There are professional offices (daytime workers), commuter dependent businesses (drive thru and fast food), destination and appointment based businesses, and very limited local serving retail.





Comparing commercial audit in 2016 to 2006 illustrates the following changes,

### Main St. W. Esplanade BIA Commercial Audit – 2016 to 2006

	2016				2006			
	Number of Units	% of Total	Est. Sq. Ft.	% of Total	Number of Units	% of Total	Est. Sq. Ft.	% of Total
<b>Retail Merchandise</b>								
Clothing and Accessories	3	5.6%	10,000	9.6%	5	9.8%	9,300	10.0%
Furniture and Home Furnishings	1	1.9%	1,200	1.2%	2	3.9%	3,200	3.5%
Electronics and Appliance Stores	0	0.0%	0	0.0%	2	3.9%	6,200	6.7%
Building Supply and Garden Equipment	0	0.0%	0	0.0%	0	0.0%	0	0.0%
General Merchandise	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sporting Goods, Hobby, Book, Music	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Other Retail	2	3.7%	2,300	2.2%	0	0.0%	0	0.0%
<b>Total Retail</b>	<b>6</b>	<b>11.1%</b>	<b>13,500</b>	<b>13.0%</b>	<b>9</b>	<b>17.6%</b>	<b>18,700</b>	<b>20.2%</b>
<b>Food/Drug Retail</b>								
Food and Beverage Stores	3	5.6%	5,000	4.8%	2	3.9%	3,300	3.6%
Health and Personal Care Stores	0	0.0%	0	0.0%	0	0.0%	0	0.0%
<b>Total Food/Drug Retail</b>	<b>3</b>	<b>5.6%</b>	<b>5,000</b>	<b>4.8%</b>	<b>2</b>	<b>3.9%</b>	<b>3,300</b>	<b>3.6%</b>
<b>Food Services</b>	<b>7</b>	<b>13.0%</b>	<b>14,500</b>	<b>14.0%</b>	<b>7</b>	<b>13.7%</b>	<b>14,500</b>	<b>15.7%</b>
<b>Services</b>						<b>0.0%</b>		<b>0.0%</b>
Personal Services	3	5.6%	3,000	2.9%	3	5.9%	3,500	3.8%
Personal Services - Beauty	4	7.4%	5,700	5.5%	8	15.7%	11,600	12.5%
Financial Services	2	3.7%	5,500	5.3%	1	2.0%	2,500	2.7%
Medical Services	11	20.4%	18,700	18.0%	6	11.8%	5,700	6.2%
Professional Services	13	24.1%	30,400	29.3%	11	21.6%	26,000	28.1%
Recreation Services	2	3.7%	5,000	4.8%	1	2.0%	3,500	3.8%
Other Services	0	0.0%	0	0.0%	0	0.0%	0	0.0%
<b>Total Services</b>	<b>35</b>	<b>64.8%</b>	<b>68,300</b>	<b>65.8%</b>	<b>30</b>	<b>58.8%</b>	<b>52,800</b>	<b>57.0%</b>



<b>Total Occupied</b>	<b>51</b>	<b>94.4%</b>	<b>101,300</b>	<b>97.6%</b>	<b>48</b>	<b>94.1%</b>	<b>89,300</b>	<b>96.4%</b>
<b>Vacant</b>	<b>3</b>	<b>5.6%</b>	<b>2,500</b>	<b>2.4%</b>	<b>3</b>	<b>5.9%</b>	<b>3,330</b>	<b>3.6%</b>
<b>Total</b>	<b>54</b>	<b>100.0%</b>	<b>103,800</b>	<b>100.0%</b>	<b>51</b>	<b>100.0%</b>	<b>92,630</b>	<b>100.0%</b>

Source: 360 Collective

### Findings

- From 2006 to 2016:
  - There are more businesses and more commercial square footage.
  - Vacancy has fallen.
  - Services has increased. This includes an increase in medical services and a decline in personal services.
  - Retail merchandise has fallen.
  - Food services has remained relatively constant.

### Business Mix Recommendations

- Develop a realistic wish list of commercial businesses
- Ensure ideal business mix stays within the parameters set out as per the Main St. W. Esplanade BIA vision and to ensure a healthy mix of complementary businesses (no one business category should dominate over the others)
- Maintain retail merchandise at current range of 15% minimum (currently 13%)
- Maintain food services at minimum 15% to 20% (currently 14%)
- Increase food and drug retail to minimum 10% to 12% (currently 5%)
- Ensure vacancy remains under 4% (currently 2%)

## 7.1 Changes in Main St. W. Esplanade BIA Businesses from 2006 to 2016

The following pictures are a sample selection of businesses in Main St. W. Esplanade BIA in 2016 and in 2006 that illustrate investment in the local businesses.

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



2016: 445 Main St. W. – the façade has been updated to accommodate the change in business use



2006



2016: 310 Main St. W.- Destination apparel retailer



2006



2016: 302 Main St. W. – Expansion of adjacent apparel retailer for offices



2006



2016: 65 Locke St. S. – The bank painted the façade.



2006



2016: 69 Queen St. S. – renovated building that are part of a multiple building office complex with shared parking



2016: 215-217 Main St. W. - renovated building that are part of a multiple building office complex with shared parking



2016: 267 Main St. W. – modest improvements to the entrance



2006





2016: 281 Main St. W. – the brick has been cleaned up and the paint removed. The removal of some of the plantings makes it slightly better to see inside the windows from a retailer's perspective



2016: 287 Main St. W. – modest improvements to the facade



2006



2006



2016: 291 Main St. W. – The façade has been brightened up and windows replaced.



2016: 203 Main St. W. – the buildings and gas station have been demolished for a multi-storey mixed-use building



2016: 315 Main St. W. – a gate has been added



2006



2006



2006



2016: 368 Main St. W. – the original building has been altered to create a larger office.



2006



2016: 331-333 Main St. W. – the commercial space has been converted back to residential



2006



379 Main St. W. – the signage has been removed



2006





2016: 405 Main St. W. – updated restaurant concept



2006



2016: 408 Main St. W. – updated facade






2006

## 7.2 Main St. W. Esplanade BIA and Area Retail Rents

The following listings represent active vacant units along Main St. W. Esplanade BIA and nearby.

### Local Area Rents

Address	Sq. Ft.	Rent/sq. ft. (gross)	Comments	
61 Strathcona Ave. S.	1,100	\$9.82	Office	
392 Main St. W.	4,000	\$11.99	Office	
54 Hess St. S.	6,400	\$20	Blended Rate for all levels incl. basement	

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105 George St.    1,119    \$31.64  
gross




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110 George St.




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78 George St.    \$18



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54 Queen St. S.	1,879	\$20
	1,000	\$20

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### Findings

- Rents near Hess Village and Downtown are higher than the other portions of the BIA. Some units can be as high as \$35/sq. ft. (gross). This is similar to rents in Locke St. S.
- Office spaces are \$10 to \$25/sq. ft.
- Retail is generally \$20/sq. ft. if there is ample parking.
- For redevelopment along Main St. W. to occur and to demand ground level retail commercial spaces, the rents should be at least \$25/sq. ft. or higher.



### **Implications for Main St. W. Esplanade BIA**

- The commercial audit reveals that Main St. W. Esplanade BIA caters to a range of different markets. Some are very convenience and accessibility oriented based on the high volume of vehicular traffic. Other businesses feed off of adjacent activity centres such as Hess Village. There is a defined office workplace along Main St. W. that feeds off of convenience, accessibility, and proximity to Downtown. There are destination businesses that create their own traffic and a few local serving businesses.
- Rents in the area reflect the accessibility and adjacency to key target markets.
- The future of Main St. W. will be based on the relationship of three major roles the street plays including as an accessible transit corridor, a potential local neighbourhood centre, and a destination centre.
- The degree to which retail commercial continues to evolve at the base of these buildings is determined by the future vision for the area.

## 8.0 Investment in Main St. W. Esplanade BIA

The following tables and charts highlight the current and past investment in Main 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 is one active development application for properties in Main St. W. Esplanade BIA area. Several others are still in the early planning stages and have not been submitted to the City.

#### Development Applications

Application Type	Number	Address	Purpose of Application
Site Plan	DA-11-085*	235 Main St. W.	To permit the development of a three-storey retail/office building (7,500 sq. ft. first floor, 9,000 sq. ft. on the second and third floor), with underground and surface parking to the rear of the building. – NOTE: STATUS OF DEVELOPMENT SHOULD BE CHECKED UP



Source: City of Hamilton Planning and Economic Development Department



## Commercial Building Permits

### Main St. W. Esplanade BIA Value of Commercial Building Permits

Year	Annual Total	Cumulative Total
2010	\$103,400	
2011	\$87,100	\$190,500
2012	\$6,500	\$197,000
2013	\$0	\$197,000
2014	\$0	\$197,000
2015	\$50,000	\$247,000

Source: City of Hamilton

### Findings

- The investment in commercial businesses along Main St. W. Esplanade BIA has been minimal from 2010 to 2015.
- There have been improvements along the south side of Main St. W. between Queen St. S. and Hess St. S. including a large shared parking area and improvements to the buildings.

### Grants and Incentives

There have been no grants or loans for businesses in Main St. W. Esplanade BIA from 2010 to 2015.

Source: City of Hamilton

### Findings

- There has been no use of the City of Hamilton grants and loan programs for commercial businesses.



## Assessed Value

### Main St. W. Esplanade BIA Assessed Value – Commercial Businesses

Year	Assessed Value	Year Over Year Change
2010	\$11,634,737	
2011	\$12,704,075	9.2%
2012	\$13,859,160	9.1%
2013	\$14,208,695	2.5%
2014	\$14,563,830	2.5%
2015	\$14,563,830	0.0%

Source: MPAC, City of Hamilton

## Findings

- From 2010 to 2015, the assessed value of the commercial areas within the Main St. W. Esplanade BIA has increased at an annualized rate of 4.6%.
- From 2012, onwards the rate of growth has decreased significantly.
- It is noted that the building at 235 Main St. W. has been demolished and no building has replaced it as of yet.

## Implications for Main St. W. Esplanade BIA

- Redevelopment of properties along Main St. W. is a key priority to re-establishing a vision for the street.
- The street should focus on increasing density for residential and office developments.
- Care and attention to parking accommodations on development sites is a significant concern.
- Whether ground level retail commercial is a required element of new developments needs to be reviewed.





### Main St. W. Esplanade BIA Budget

	<b>Christmas Grant</b>	<b>City Contribution</b>	<b>Parking Revenue Sharing</b>	<b>Total Grants</b>	<b>Levy</b>	<b>BIA Budget</b>
2010	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00
2011	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2012	\$960.58	\$1,195.66	\$0.00	\$2,156.24	\$7,800.00	\$17,482.76
2013	\$0.00	\$1,045.59	\$1,304.78	\$2,350.37	\$6,942.00	\$20,783.00
2014	\$0.00	\$1,042.78	\$1,438.97	\$2,481.75	\$0.00	\$0.00
2015	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Source: City of Hamilton



## 9.0 SWOT Summary

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

### STRENGTHS

- Central, accessible location
- Changing demographics throughout the day
- Ample sized blocks that can be redeveloped to accommodate a mix of uses including residential, office, and retail
- Growing pressure in neighbouring business districts that could lead to spillover effects – more competitive and complementary business districts
- Variety of types and ages of building facades and sizes which allows for a varied group of businesses

### WEAKNESSES

- The speed of traffic
- The volume of traffic
- Attitude from some Hamilton residents that Main St. W. is there for their purposes to travel into Downtown Hamilton quickly and efficiently
- Local businesses must rely on a narrow segment as the trade area is cut off from the southern neighbourhoods by the rail line to the south and King St. W. to the north (note that the recent construction of the Pearl St. pedestrian bridge may help to alleviate this to a limited degree)
- Topography of the street creates grade related challenges for retail

### OPPORTUNITIES

- Development opportunities to increase the density of the area
- Create active ground level retail frontages in new developments while allowing for ample parking, sight lines, entrances, sidewalks, and ground floor building heights
- There is office opportunity. New development should locate office on second floor. Could have 6 or 7 storey buildings with retail commercial at grade, surface parking at the rear, office on the second level, and four or five floors of residential.



## 10.0 Vision for Main St. W. Esplanade BIA

### First Principles BIA Work

The Main St. W. Esplanade BIA needs to affirm their vision and identity as part of a complete branding assessment. While there are recommendations for the BIA and suggestions for improvement, the ideal situation is that each recommendation is vetted against the new brand identity.

This report and the findings and suggestions should be used by the branding assessment as a first step towards developing the new identity.

The following principles are agreed upon for the future vision of Main St. W. Esplanade BIA:

- Remove the name esplanade from BIA title
- Acknowledge that the vision and brand for the BIA will have to transition as it moves from a highway commercial retail strip to a more local neighbourhood focused environment
- Create a transitional marketing campaign that is ephemeral to continually work toward grabbing visitors' attention
- Create a fun, "in-your-face" marketing campaign around constant change happening along Main St. W.

Main St. W. will transition from:

1. Gateway – something for everybody
2. Specialized retail mix suited to the local neighbourhood



## **11.0 Target Markets**

### **11.1 Primary Target Market**

#### **Who Are They**

- Local residents including students, young professionals

#### **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, specialized food stores
- 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 their 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
- Professional offices – lawyers, accountants, real estate, consulting, medical, as well as creative business types
- Destination – high end fashion, unique sports, very highly specialized retailers
- Other amenities – small black box theatre (minimum two stages), library, incubator community space that support a youthful energetic population base



## 11.2 Downtown Workers and Main St. W. Workers

### Who Are They

- Young professionals working in west Downtown Hamilton on/near Main St. W.

### Current Experience

- Lunch with friends for unique items such as ethnic, healthy, sandwiches, salads, as well as business lunches
- 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 food and community building (e.g., single tables and longer communal tables)
- Wifi, plug-in tables to work on laptops or smart devices
- Solutions to support career advancement – career networking events
- Will buy career clothing in bulk
- Office support products – bags, briefcases, office supplies, copying services, etc.



### **11.3 Hotel Visitors**

#### **Who Are They**

- Leisure travellers
- Conventions and conference attendees
- Business travellers

#### **Current Experience**

- Quick breakfast, lunch, and dinner
- Fast casual dining

#### **Desired Experience**

- Selection
- Good value
- Entertainment options with dining
- Unique local experiences



## 11.4 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/Brew pub
- Combined with more experiential offerings such as recreation (board games, ping pong, bowling, billiards, etc.)



## 12.0 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





## 12.1 Organization and Governance

### Challenges

- Limited budget: BIA needs to increase budget as part of the process to put in place the basic elements that will ensure the organization is sustainable, there is buy-in from members, and can provide value to members in terms of program initiatives
- Hire staff person (part time)

### Recommendations – Organization

<b>SHORT TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
Increase BIA budget	<ul style="list-style-type: none"><li>• Minimum \$20,000 to \$30,000 total budget through levy, grants, and revenue sharing arrangements (There is 100,000 sq. ft. of commercial space and it should be assessed at a minimum of \$0.30 per sq. ft. or higher)</li></ul>	<ul style="list-style-type: none"><li>• Tie new action plan to BIA budget/levy increase</li><li>• Ideal time when transitioning into a full functioning BIA and will give BIA needed resources to ensure they do not collapse again</li></ul>	BIA and City Urban Renewal	<ul style="list-style-type: none"><li>• Immediate to within next budget cycle or sooner</li></ul>



Hire part time staff	<ul style="list-style-type: none"><li>• Develop job description and send out alerts</li></ul>	<ul style="list-style-type: none"><li>• Experience working with diverse stakeholders as well as either marketing or economic development experience</li></ul>	Yes – look to share staff with other BIAs, or with other businesses, or Downtown Ambassador program, etc.	<ul style="list-style-type: none"><li>• Within four months</li></ul>
Instead of committees develop Task Forces specifically focused on short-term tasks	<ul style="list-style-type: none"><li>• Develop mandate letters for each Task Force</li></ul>	<ul style="list-style-type: none"><li>• Four Task Forces – (1) LRT Liaison and communications; (3) Economic Development; (3) Parking and Transportation; and (4) Partnerships</li></ul>	Have to recruit members, primarily property owners	<ul style="list-style-type: none"><li>• Within four months</li></ul>



<b>SHORT TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
LRT	<ul style="list-style-type: none"> <li>Commit board member or staff time to participate in LRT meetings and provide liaison to members</li> </ul>	<ul style="list-style-type: none"> <li>Attend LRT meetings</li> <li>Work with City and eventually contractor</li> </ul>	Yes	<ul style="list-style-type: none"> <li>Ongoing – may require new member every 18 months</li> </ul>
Develop social media policy	<ul style="list-style-type: none"> <li>Policy in place</li> </ul>	<ul style="list-style-type: none"> <li>Determine when and how you should be replying to social media that affects the BIA and members</li> </ul>	BIA	<ul style="list-style-type: none"> <li>By next AGM</li> </ul>
Develop a BIA purchasing policy	<ul style="list-style-type: none"> <li>Policy in place</li> </ul>	<ul style="list-style-type: none"> <li>Rules and procedures for accountability</li> </ul>	BIA	<ul style="list-style-type: none"> <li>By next AGM</li> </ul>
Host City Staff for a BIA presentation on City grants/loans	<ul style="list-style-type: none"> <li>Distribute grant/loan brochure</li> </ul>	<ul style="list-style-type: none"> <li>BIA members have not utilized the City grant and loans program. Providing them with the chance to learn more is vital.</li> </ul>	BIA and Urban Renewal	<ul style="list-style-type: none"> <li>Summer 2017</li> </ul>
Develop board succession planning program to fill and replenish as needed	<ul style="list-style-type: none"> <li>New members engaged and want to serve on board</li> </ul>	<ul style="list-style-type: none"> <li>Develop communication program to recruit new board members</li> </ul>	BIA	<ul style="list-style-type: none"> <li>One year</li> </ul>



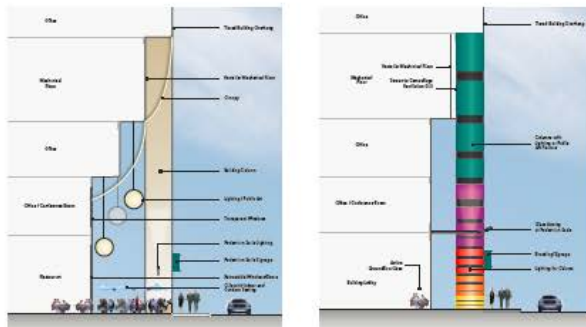
<b>MID-LONG TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
Develop and increase partnerships	<ul style="list-style-type: none"> <li>Create a package that shows the mutual benefit of working together</li> </ul>	<ul style="list-style-type: none"> <li>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, student associations</li> </ul>	Yes	<ul style="list-style-type: none"> <li>One year</li> </ul>
City Departments – Parking, Transportation, Urban Renewal, Planning	<ul style="list-style-type: none"> <li>Set up issue based task force that will address three specific issues of slowing traffic, parking areas painted, and moving meters (or making them more noticeable)</li> </ul>	<ul style="list-style-type: none"> <li>Focus on mobility, transportation, and parking</li> <li>Aim to resolve three issues by end of 2017</li> <li>If convenient, continue the task force to undertake increased parking on the south side of Main St. W. and other issues</li> </ul>	Yes	<ul style="list-style-type: none"> <li>Task force 2017 completion date</li> </ul>
Other BIAs – Locke St. S., King St. W., Downtown	<ul style="list-style-type: none"> <li>BIA should sit on minimum of four other committees of interest to them</li> </ul>	<ul style="list-style-type: none"> <li>Participate in programs such as Downtown Clean and Safe Taskforce</li> </ul>	Yes,	<ul style="list-style-type: none"> <li>2 to 3 years</li> </ul>

## 12.2 Economic Development

The following recommendations and suggestions are primarily for private sector development within the BIA. The BIA can work with the City to review development applications and ensure that they assist in creating an improved shopping and walking environment that is more cohesive. These recommendations are not meant to overwhelm the BIA in terms of tasks they need to take on but rather are suggestions related to good quality mixed use development.

The following private sector development suggestions include:

- Support redevelopment of land for higher density, mixed-use development such as 150 Main St. W.
- 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.
- 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 patio development along Main St. W. and the side streets to support cafes and restaurants (while patios may not work immediately today, the new developments should allow for this possibility in the future in their design as the street orients itself to a local neighbourhood street environment).
- If the developer agrees to a set-back, a privately-owned park (POP), 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.



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

- Goal is to increase density of the area to 7,000 or higher within five years
- 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
- Minimum ground level retail heights – 4.0 m
- Encourage minimum 4.5 m sidewalk or sidewalk/patio 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 south side, some loading can be on the lower level due to the topography of the land
- Encourage greater than 60% frontage coverage with retail commercial – have residential entrances located on side streets rather than on Main St. W.
- 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



## Recommendations – Economic Development

<b>MID TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
Educate property owners and businesses on all City incentive programs including those that allow for eligible applicants to receive phase-in of tax increases that may result from improvements to property	<ul style="list-style-type: none"> <li>Review taxes and assessment values on a regular basis with City staff (as part of determining BIA budget and levy)</li> </ul>	<ul style="list-style-type: none"> <li>Arrange for City of Hamilton staff to provide education sessions on incentive programs</li> </ul>	BIA and City Urban Renewal	<ul style="list-style-type: none"> <li>12 months</li> </ul>
<b>LONG TERM</b>				
Meet with developers and brokers to familiarize BIA basic indicators and terms – min. ground floor rent, ROI, loading areas, height and density	<ul style="list-style-type: none"> <li>BIA needs to understand the inputs that are used by developers</li> </ul>	<ul style="list-style-type: none"> <li>Set up learning meetings with brokers and developers</li> <li>Create case studies for development</li> </ul>	BIA, Brokers	<ul style="list-style-type: none"> <li>3 to 5 years</li> </ul>

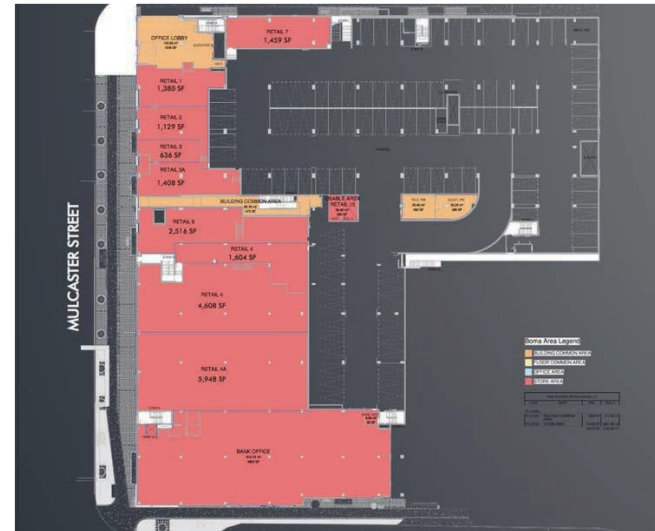


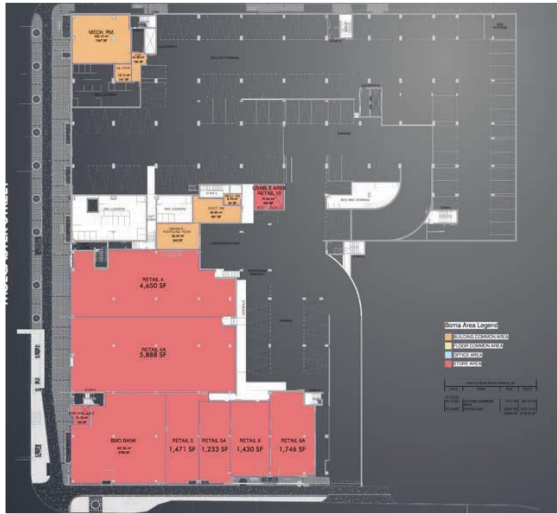


BIA to understand and agree to minimum standards for ground and upper level retail	<ul style="list-style-type: none"><li>• Chart comparing and adding to key design standards</li></ul>	<ul style="list-style-type: none"><li>• Decide which elements from the Downtown Secondary Plan and C5 mixed-use zoning that Main St. W. wants further refinement on including ground floor ceiling heights, minimum streetfront coverage ratio, on-site parking, etc.</li></ul>	BIA and City Planning	<ul style="list-style-type: none"><li>• 3 to 5 years possibly longer</li></ul>
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### Example of Mixed Use Development Including Internalized Parking

An example of a complex mixed-use development includes the Collier's Centre in Downtown Barrie. The height of the project can be varied, but the inclusion of retail on the ground level with parking located at the rear. Additional levels can be used for office commercial with parking located adjacent may be an ideal alternative for Main St. W. development opportunities. The Main St. W. blocks are large enough to accommodate similar sized redevelopment proposals.







### 12.3 Physical Improvements

The following suggestions do not carry specific recommendations but are part of the overall improvements to the physical realm that the BIA and the City of Hamilton Public Works, Parking, Transportation, and LRT departments can coordinate for mutual benefit. As stated previously, many of these recommendations are suggestions.

#### Recommendations – Physical Improvements

<b>SHORT TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
Set parking task force to improve parking visibility and usage and to slow traffic	<ul style="list-style-type: none"> <li>Monitor parking revenue</li> </ul>	<ul style="list-style-type: none"> <li>Work with City of Hamilton Parking, Transportation, and Councillor to come to an agreement of increasing parking usage, visitation, visibility, and to slow traffic</li> </ul>	BIA and City Parking and Transportation	<ul style="list-style-type: none"> <li>Immediate</li> </ul>
Increase beautification	<ul style="list-style-type: none"> <li>Number of benches, light standards, investment in streetscape, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Work with City of Hamilton Public Works on increasing investment of streetscape to match brand identity and increase pedestrian movement, flow, and dwell time</li> </ul>	BIA and City Public Works	<ul style="list-style-type: none"> <li>Within one year</li> </ul>

<b>MID TERM</b>				
<b>Specific</b>	<b>Measurable</b>	<b>Actionable</b>	<b>Responsibility</b>	<b>Time Frame</b>
New developments to take advantage of creating a more enjoyable public realm atmosphere	<ul style="list-style-type: none"> <li>Number of developments that create improved public realm and pedestrian flow</li> </ul>	<ul style="list-style-type: none"> <li>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. as well as privately owned park spaces</li> </ul>	BIA and City Planning	<ul style="list-style-type: none"> <li>Ongoing</li> </ul>

## Parking Management

- Set task force to over-see increase parking utilization through the following programs: painting lines for parking areas, move parking meters closer to the street, increased visual clues that on-street parking is available.
- Address parking by assessing on-street parking opportunities on the south side of Main St. W. with City staff
- Hamilton Parking is assessing the requirements for increased technology for using, paying, and enforcing parking rules. Office workers in the Downtown will be able to use a permit system more to discourage them from occupying nearby lots that are meant for consumers.
- 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. In some instances, the parking can be accommodated directly behind the new mixed-use development. (note that the development on George St. will include provision for public parking as part of the development application to replace potentially lost surface parking in the area).
- Technology will be able to determine those vehicles that park in the area with high frequency that should be encouraged to get a permit and park in a long-term lot. Enforcement of long-term parking violators would free up nearby surface parking for the commercial businesses who rely on constant turnover of the spaces.
- For new developments, encourage parking access from the side streets and not directly from Main St. W. as per the bylaw.



Make parking meters stand out more through artistic touches such as adding colour – if permitted use paint or have wrap around adhesive sleeves produced. This can be part of the Main St. W. identity



Main St. W. can make the parking meters stand out with removable art – this is knit bombing but it can be adhesive sleeves



The parking meters can become professional art pieces



Create a parking meter art work campaign to draw attention to Main St. W.



Or Main St. W. could attach balloons to the parking meters to make them stand out



Turn a potential negative (lack of parking and visibility of parking) into a positive. Produce Main St. W. parking meter t-shirts to draw attention to the area



### Beautification

- As part of a new brand identity, develop banners, streetscape, lighting, decorative lighting, gateways, etc. that are to be rolled out over the next few years. The new brand should precede any major capital investment into streetscaping.
- The beautification should support the aims of increased walkability, safety, furthering economic development potential, place making etc.
- Protective barriers and bollards may be placed along Main St. W. to protect pedestrians until the traffic speed is significantly reduced.
- Work with City of Hamilton for the installation of Main Street W. BIA gateways.
- Review Hamilton signage bylaws with respect to Main St. W. with aim to clear clutter from poles and billboards, review moving signs and their appropriateness, etc.



Bollards can include elements of public art sculpture



Bollards can also serve dual purposes such as seating



Increased safety as well as entertainment focused lighting could be combined

Other streetscape improvements can include:

- Bike racks
- Streetscape plantings
- Street lighting that can be sculptural elements
- Banners and brand lighting



## Enhanced and Animated Ground Level Experience – Patios and Privately Owned Parks

The City of Hamilton's patio report was recently submitted for review and approved. The patios should be made of high quality materials and have a sense of permanence (may be required to remove them in the winter). At present, patios along Main St. W. may be impractical. However, new development should give consideration for the future inclusion. As the street evolves, allowing for those patio type space to be retrofitted into developments will be important.



Attention to detail to 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



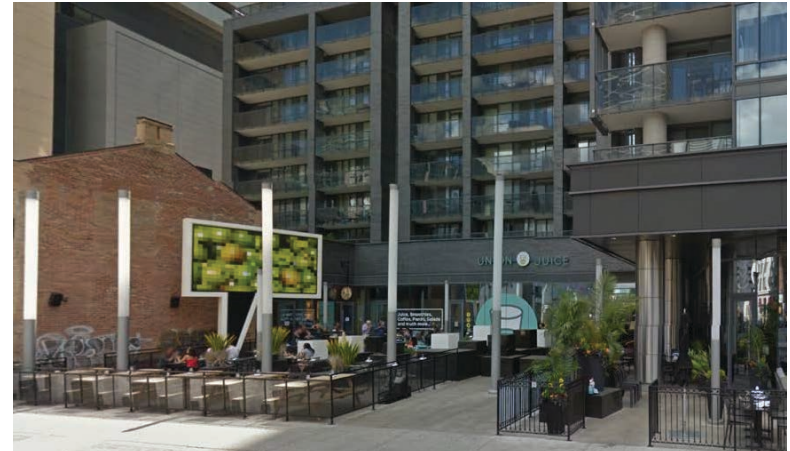
In Calgary, the block between 8<sup>th</sup> and 9<sup>th</sup> Ave NE was set back from the street to create a public space, and parking for the retail commercial businesses and patio space



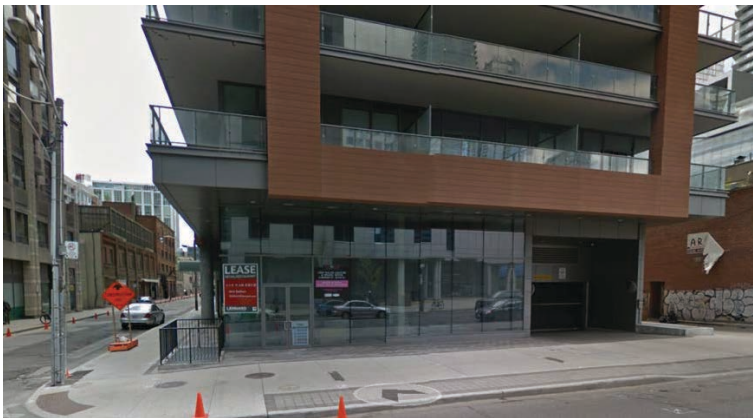
Much needed public gathering space that enhances the retail commercial environment can be beneficial



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 Space – POPS) 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 be developed





Patios can be more sculptural yet also encourage community building and conversation



Can make use of containers



## 12.4 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"><li>• Gateway to Downtown Hamilton</li><li>• Highly educated target audience</li></ul>	<ul style="list-style-type: none"><li>• Outdated brand identity – looks and sounds like a condo complex</li><li>• Odd name</li><li>• No brand blueprint</li><li>• No profile of local businesses</li><li>• Low – modest BIA budget (\$15 - 20K total BIA budget)</li><li>• Unclear who the website is for target audience-wise</li><li>• No social media channels</li></ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Transition to a more local focused neighbourhood BIA</li></ul>	<ul style="list-style-type: none"><li>• Other neighbouring Hamilton BIA's that are well defined and more sophisticated in their brand identity and marketing initiatives</li></ul>



## 12.5 Marketing: Website and Social Media Review

- **Domain:** [www.mainwestesplanade.com](http://www.mainwestesplanade.com)
- Domain was registered Monday, February 22, 2016
- Domain expires Saturday, May 5, 2018

### Evaluation

The website was reviewed under the following criteria headings:

- Purpose
- Content
- Design
- Authorship

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

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

### Purpose

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

### Content

- ☒ The content is easy to read and understandable but the amount of content is severely lacking.
- ☒ There is an outline of topics provided allowing users to find topics and move among them easily.

①

②

③

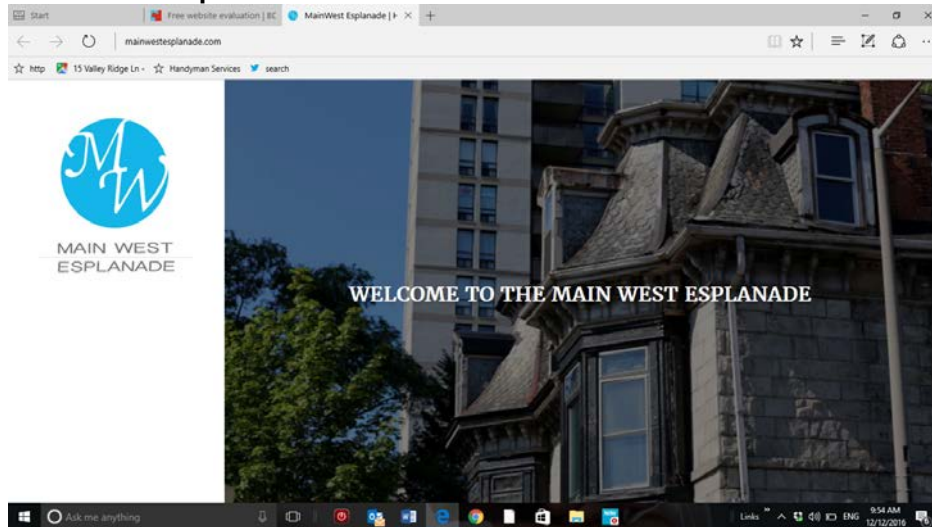
④

⑤

- ☒ The spelling and grammar is always correct
- ☒ The information is current and accurate

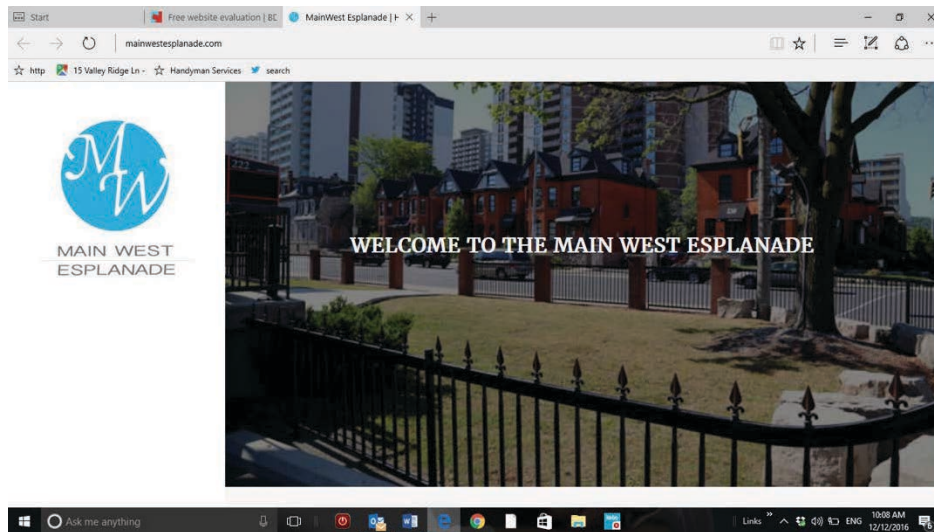
\*The server is not reporting so we are unable to determine if the website information is updated regularly

## Main St. W. Esplanade BIA Website



- ☒ There are more links to information on the topic provided - The graphics used on the site don't show much activation. They are beautiful quality images and show a lot of buildings and businesses but not much in the way of people enjoying the space and shopping in the stores.
- ☒ Graphics are relevant and appropriate to the topic

## Main St. W. Esplanade BIA Website Example



- ☒ The site offers information that cannot be found anywhere else - The City of Hamilton website indicates the Main West Esplanade BIA Boundary map, the link to the website and the Chair of the BIA as contact information.
- ☒ The site links to the client Facebook account - There is no indication of a Main Street West Esplanade Facebook group.
- ☒ Each website page has a defined heading - The website only consists of a home page.
- ☒ The site links to the client twitter account - There is no indication of a twitter account for Main Street West Esplanade.
- ☒ The site links to the City of Hamilton website.

### Design

- ☑ The information is easy to use and find.
- ☑ The text is easy to read and not cluttered.
- ☑ The site design is appealing to the intended audience.
- ☒ The links pages are well organized and appealing - There are no link pages.
- ☑ The website loads in a reasonable amount of time.
- ☑ This website is optimized for printing.
- ☑ The website is mobile friendly and easily navigates by mobile phone.



### **Authorship**

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

### **AODA Compliance**

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

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

### **Social Media**

- A review of food service ranking sites such as Yelp and Zomato reveal:
- There are no top rankings for food service businesses on Main St. W. Esplanade BIA.

### **Findings**

- In general, it must be assumed that the Website for the Main Street West Esplanade BIA is a work in progress and that it is intended that the website will be further populated with enhanced website architecture and data.
- Included links to the City of Hamilton, other BIA's, municipal act and others is suggested and the populating of a full and accurate business directory is recommended to take a further step. (Multiple links helps with search engine optimization and a business directory will reveal more about the business community).
- The website does function well on a mobile phone and the graphics are appealing albeit the pictures lack the people experience aspect.
- A good start but much further development is required.





## 12.6 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**.

<b>BASICS – now</b>	<b>SHORT TERM – 1 year</b>
<ul style="list-style-type: none"><li>• New brand program</li><li>• Change the name</li><li>• Target Audience prioritization exercise</li></ul>	<ul style="list-style-type: none"><li>• Update the current website – clean it up, add local photography, update content, manage it monthly</li><li>• Stronger profile of the Business community – who they are, what they offer, how they are unique</li><li>• Evaluate your social media channels and determine what resources you must support them</li><li>• Focus on member engagement and enrollment</li></ul>
<b>MID-TERM – 2/3 years</b>	<b>LONG TERM – 5 years</b>
<ul style="list-style-type: none"><li>• Budget development exercise to increase marketing investment</li><li>• New website to reflect the brand blueprint</li></ul>	<ul style="list-style-type: none"><li>• Advertising Plan</li></ul>



## **13.0 Planning Context – Main Street West Esplanade**

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

### **13.1 Introduction**

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

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

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

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

### **13.2 Official Plan**

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

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



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

The designation's design policies strongly encourage a compact urban form with a streetscape and building arrangement that supports pedestrian use and creates "vibrant people places". To strengthen the pedestrian focus in areas where it does not currently exist, infill development will be required in a physical arrangement that supports a vibrant and active sidewalk environment (4.6.19). Buildings are to be located close to the street with no parking, drive-throughs or stacking lanes between the building and the sidewalk. Large single use buildings over 5,000 square metres are encouraged to locate in the rear or interior of the site with smaller foot print buildings located close to the sidewalk. Alternatively, larger stores may be located up to the streetline provided they are lined with smaller stores, multiple entrances or other similar means to animate the streetscape (4.6.21). In areas that don't have a secondary plan, development applications must include a concept plan that addresses how (i) the creation of a vibrant people place is being achieved, (ii) the pedestrian experience is being improved in the public and private realm, and (iii) the property will intensify over time (4.6.23).

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

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

It is noted that additional Pedestrian Predominant Streets may be designated in Secondary Plans.

### **Implications for BIAs**

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



### **14.3 Zoning By-law**

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

Four zoning designations are being proposed in the BIAs in Hamilton outside of the Downtown Hamilton. The one most applicable to Main St. West Esplanade is C5. Some portion of the BIA may fall into the Downtown Secondary Plan.

(a) The Mixed Use Medium Density (C5) Zone: This is the proposed zoning for the Main Street West Esplanade.

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

### **14.4 On Street Patio Program**

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

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

#### **Implications for BIA**

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



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

## BIA Marketing Planning - GUIDELINES



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

## BIA Marketing Plan - CHECKLIST



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

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

<b>WEEKLY or MONTHLY</b>	<b>ACTION</b>
<b>1. Website Updates</b>	<ul style="list-style-type: none"> <li>• Be current or you will not maximize the benefits</li> </ul>



	<ul style="list-style-type: none"><li>• Ensure that the posts are “on brand”</li></ul>
<b>2. Social Media posts</b>	<ul style="list-style-type: none"><li>• Be current or you will not maximize the benefits</li><li>• Ensure that the posts are “on brand”</li></ul>
<b>3. Stakeholder engagement</b>	<ul style="list-style-type: none"><li>• Regular communication with your members is critical</li><li>• Keep it simple (one page e-bulletin)</li></ul>
<b>3. Marketing Plan &amp; Calendar review</b>	<ul style="list-style-type: none"><li>• Where you are at, what is working, what isn't and why</li><li>• Revisions to ensure success</li></ul>