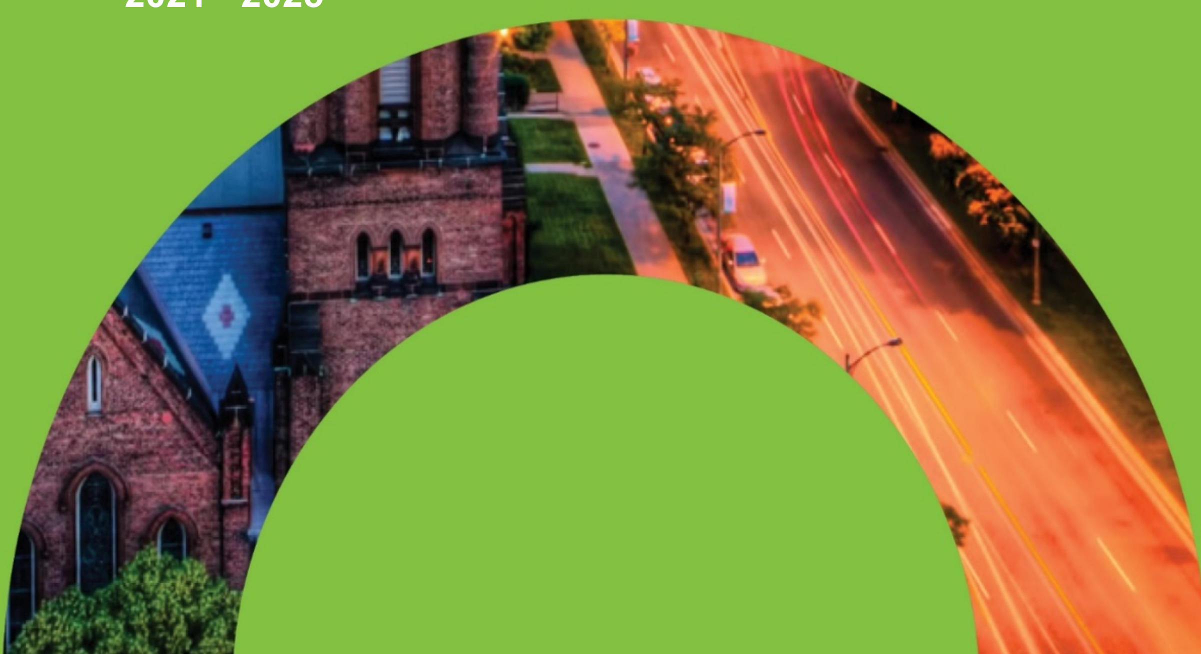
DOWNTOWN LONDON RE-IMAGINED

DOWNTOWN LONDON STRATEGY

2021 - 2025



Downtown London Strategy

London Downtown Business Association, 2021

Consulting Team

Aileen Murray, Ec.D. (F), Mellor Murray Consulting

David Campbell, MBA, Jupia Consultants Inc.

Kevin Curtis, PhD, MCIP, Curtis Planning Inc.

Tracy John, Amplify Communications

Advisory Committee

Barbara Maly, Executive Director, **Downtown London**, Project Lead

Andrew McClenaghan, London Downtown Business Association Board Chair

Don McCallum, Main Street London Board Chair

Jim Bujouves, Farhi Holdings Corporation

Steve Cordes, Youth Opportunities Unlimited

Allan Drewlo, Drewlo Holdings

Cheryl Finn, Tourism London

John Fleming, Western University

Christina Fox, Tech Alliance of Southwestern Ontario

Michelle Giroux, Fanshawe College

Graham Henderson, London Chamber of Commerce

Andrea Hibbert, London Arts Council

Kapil Lakhotia, London Economic Development Corporation

Steve Pellarin, London Small Business Centre

Kelly Scherr, City of London

D/Chief Trish McIntyre - London Police Services

Our thanks to the residents, businesses, and stakeholders of London and the surrounding area that contributed to the development of this strategy. A special thank you to the Main Street London and London Downtown Business Association board members and staff for their contribution to the strategic planning process.

Downtown London Strategy

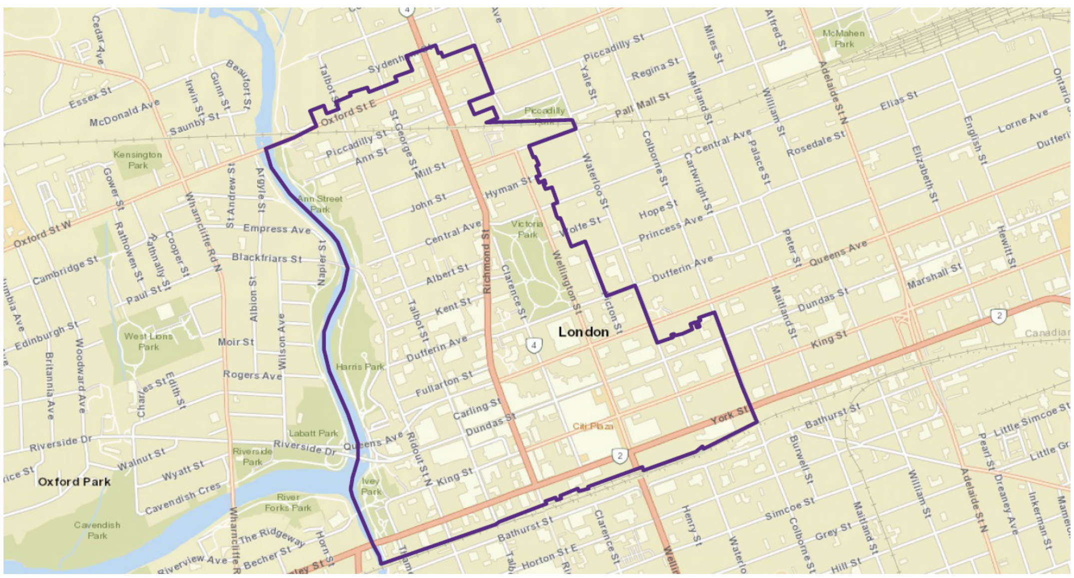
1 Introduction

Downtown London[1], including the London Downtown Business Association and MainStreet London, established this strategic plan to build on the success of the past and plan to adapt and recover from the impact of the COVID-19 pandemic.

Downtown London is made up of two complementary non-profit organizations. The London Downtown Business Association (LDBA), with 13 board members, is responsible for the finances and operations of the business improvement area. MainStreet London (MSL), with 11 board members, is a separate non-profit corporation that administers grants and loans, providing incentives for investment in the downtown[2].

The LDBA area (Downtown London district) is bounded by the Thames River to the west, Oxford Street East to the north, York Street to the south and roughly by Wellington Street to the east. The exact boundaries are shown in Figure 1.

Figure 1: LDBA boundaries



Source: City of London.

There are an estimated 7,900 residents and 5,300 households in **Downtown London** boundaries (2021)[3]. The City of London is forecasting strong population growth for the district and surrounding area of over 2.3% per year between 2019 and 2029, tapering only slightly to 1.8% per year from 2029 to 2039.

[1] To help distinguish between the two similar names, **Downtown London** the organization appears in **bold** throughout this document while the geography of London's downtown is not in bold.

[2] The incentive funding was temporarily reallocated to COVID-19 relief funding to support LDBA members during the pandemic.

[3] Source: Environics Analytics. This firm provides intercensal estimates for population and household dynamics.

Downtown London
LONDON
RE-IMAGINED

Downtown London is funded by a levy on commercial properties in the LDBA geographic area. There are 643 different levy paying entities in the district. Many of the levy payers are owners of commercial real estate in the downtown that, in turn, lease the property to tenants.

There are 1,485 employer business locations and 2,553 non employer business locations including all private sector, public sector and non-profit sector establishments in the downtown district as defined by the three Census Tracts in the London CMA[4]. Statistics Canada does not publish business count information specifically for the geographic area covered by **Downtown London**. However, the agency does provide detailed information on the number of employers by industry and employment level for a geographic area slightly larger and extending slightly further to the east. In this slightly larger downtown footprint, there are 1,500 employer establishments including all private sector, public sector and non-profit sector establishments. Of these approximately 1,300 are private sector businesses. Given the location and size of the Downtown London district it is likely around 1,000 to 1,100 of these businesses are located in the BIA area.

2 Creating the Downtown London Strategy

The strategic planning process was divided into three phases: research and analysis, community engagement and strategy development. The process was overseen by the boards of directors of the LDBA and MSL with input provided by the Advisory Committee consisting of key community stakeholders including City of London Staff, Council, community partners and **Downtown London** staff. These individuals were instrumental in providing insights and direction to the development of the strategy.

Figure 2: Downtown London Strategic Planning Process

[4] Business count data for the **Downtown London** district is based on data from three Statistics Canada Census Tract areas. The combined boundary of the three Census Tracts is slightly larger than the BIA but provides an important source of data to assess the business profile in the downtown.

The background to the development of the **Downtown London** Strategy is detailed in the following documents:

- Environmental Scan Summary Report (included in the appendix)
- Community Engagement Report (included in the appendix)
- SWOT Analysis and Strategic Priorities (included in the appendix)
- Strategy (this document)

The research, analysis and community engagement in Phases 1 and 2 provided the foundation for the strategic priorities outlined in the SWOT Analysis and Strategic Priorities Report. The two boards met on July 21, 2021, to review and refine the strategic priorities. The boards met again on August 19, 2021 to review a draft strategy. This document incorporates the results of the previous analysis, the direction from the strategic priorities workshop and the board feedback from the draft strategy review.

The **Downtown London** Strategy provides the vision, mission and values that will direct **Downtown London** over the next five years and beyond. It outlines the goals for **Downtown London** and continues with the strategic directions required to achieve the established goals.

The final element is an implementation plan including operations and marketing. It will outline the leader and partner(s) responsible for implementing the detailed actions, along with budget considerations on the timing and priority of the various actions. The final strategy will be summarized in an Executive Summary to share with the general public and interested stakeholders.

Several of the strategic directions rely on the direction, leadership and participation of **Downtown London's** partners and community stakeholders. As an example, the City's Core Area Action Plan is critical to establishing a safe and vibrant downtown. The importance of building and maintaining these key relationships will be critical to achieving the common goals shared by **Downtown London** and its partners.

3 Key considerations

The following section provides a summary of the key findings of the previously prepared Environmental Scan and Community Engagement Reports. Further detail is available in the two reports.

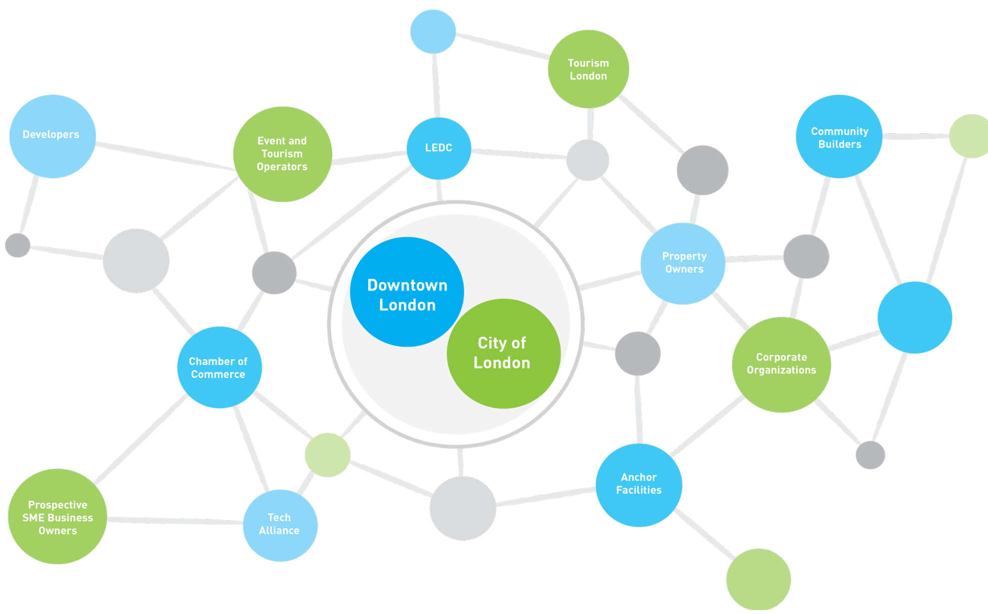
The downtown district where **Downtown London** operates is an important asset and a bellwether for the City of London. The district includes diverse cultural, recreational, and social amenities along with significant green spaces at the Thames River and Victoria Park. The district is home to major venues including Budweiser Gardens, RBC Place, the Grand Theatre, Covent Garden Market the Central Library, and the London Museum. It is the site of major festivals including Sunfest, Rock the Park and the Home County Music and Art Festival and the centre of an arts and culture sector.

The district is a tourist attraction and the nucleus of economic activity for the region. The downtown is Southern Ontario's premier office location and is home to several large regional headquarters. It also has an attractive intact heritage streetscape. The City of London is continuing to make major investments in infrastructure and programming in the downtown.

3.1 Downtown London Operations

Downtown London is part of a dense network of partners and stakeholders that contribute to the downtown experience. The organization has a number of different partners with which it must collaborate, coordinate and co-exist. This ecosystem includes the City of London, event and tourism operators, local colleges and universities, community builders such as London Economic Development Corporation (LEDC), Small Business Enterprise Centre, Tech Alliance, the Chamber of Commerce, Tourism London, developers, property owners, prospective SME business owners, and large corporate organizations to name but a few. **Downtown London** enjoys a positive relationship with this wide range of partners.

Figure 3: Downtown London's Ecosystem



As a Business Improvement Association (BIA), **Downtown London** receives a portion of the property tax from the downtown members to fund its operations. The assessment of the Downtown London district was $887 million in 2020. The City of London collected $33.3 million in business property taxes of which 5.7% went to **Downtown London** for its operations[5].

The City of London provides a broad array of financial incentives for investments in the downtown. Until recently MainStreet London also provided incentives for business investment in the downtown district. MainStreet London's funding was redirected to provide COVID relief during the pandemic.

[5] The levy received from the City of London was roughly $1.9 million in 2020 and $1.88 million in 2021.

Figure 4: Distribution of Downtown London Property Tax

Source: City of London

Downtown London is unique in its organizational structure. Many other downtown BIAs have one board and focus on the core mandated roles of marketing and advocacy on behalf of their member businesses[6]. Other communities may have economic development corporations with similar mandates as MainStreet London, but these organizations are separate entities from the respective downtown BIAs. Some examples of separate downtown development corporations include the CentreVenture Development Corporation in downtown Winnipeg and the Edmonton Downtown Development Corporation.

Over the years the roles and services of **Downtown London** have expanded, and the BIA has assumed responsibility for programs and services beyond its original mandate. Currently the roles and responsibilities of the City of London, **Downtown London** and the business members are not clearly understood by these three critical partners leading to confusion and controversy, extending to the public, media and other community stakeholders. The **Downtown London** name contributes to confusion.

The City of London has recently completed a reorganization establishing a group focused on planning and economic development of the downtown core area which includes the Downtown London district. This reorganization provides the opportunity to review and appropriately align the responsibilities of **Downtown London** and the City of London.

Similar to other major downtowns in Canada, London's downtown is facing problems with graffiti, vandalism and other forms of crime and garbage, stemming from a range of social issues including lack of affordable housing, homelessness, poor mental health and addiction. These issues have been exacerbated by COVID-19, bringing more emphasis and recognition to the needs for a more systemic approach to the causes and the symptoms of these challenges. The recent integrated and

[6] Based on the consulting team's experience and further research across Canada for this strategy,

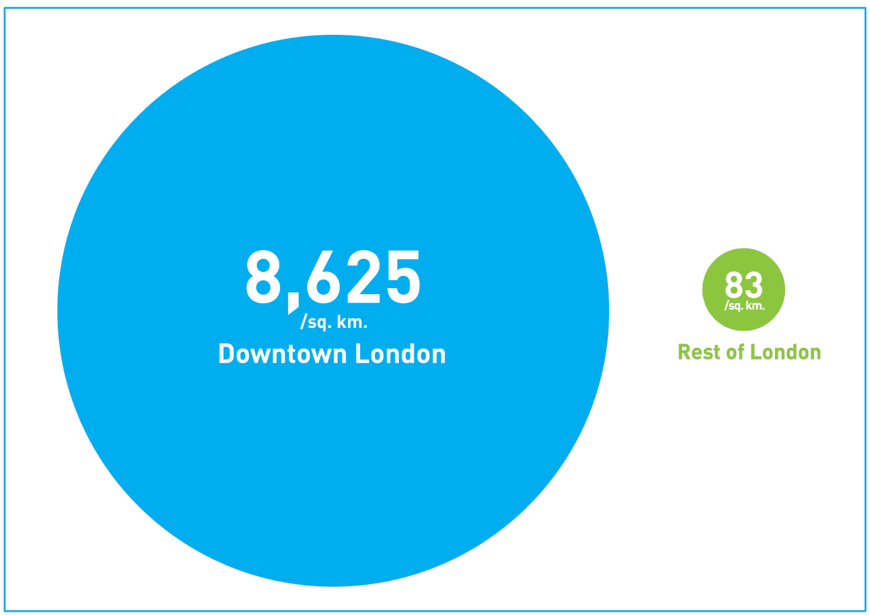
collaborative response to these challenges, by the City as part of the Core Area Action Plan, and other partners reflect best practices being used in other communities.

Downtown London will need to re-engage with **Downtown London's** stakeholders as the city and the country begins to emerge from the global pandemic. This juncture is an opportune time to re-imagine **Downtown London**, its activities, programs, marketing messages and tools.

3.2 The Downtown Economy[7]

The downtown is the economic heart of the city. The are some 1,500 employer businesses and 38,000 people working downtown[8], 15% of the employed workforce across the London CMA. Many of the largest employers are downtown including financial and insurance firms, accountants, entertainment facilities and government. The district's professional services cluster has more than 300 firms and over 40% of all London CMA employment. Nearly 3,000 people downtown work in the finance and insurance industry. Nearly two-thirds of the London CMA's fast growing information technology (IT) workforce is employed in the downtown. Many of the top tourism assets are located in the downtown.

Figure 5: Employment per square kilometer, 2020



Adapted from Statistics Canada, London CMA business location counts, June 2020.

[7] Based on Statistics Canada business location count data for a three Census Tract region in the downtown. The combined boundary of the three Census Tracts is slightly larger than the geographic boundaries of the **Downtown London** district.

[8] Pre-COVID-19 pandemic.

Downtown population

Downtown residents are predominately young and well-educated. There are 7,900 people living in the **Downtown London** boundaries and 55% are between the ages of 20 and 39. Nearly half (48%) of the adult population living in the Downtown London district has a university degree compared to just 24% across the CMA. The share with an advanced university degree (Master's, etc.) in the downtown is 20.4% compared to only 8.5% across the CMA. As of 2021, an estimated 63% live in one-person households – more than double the CMA share of 30%.

The district has been growing strongly in recent years. Relative to population size, the number of new dwellings constructed in the downtown since 2016 has been 60% more than the London CMA.

Downtown Commerce

Because the downtown is a focal point for commerce and services for the city, its merchants provide a full range of goods and services for downtown residents. There are 146 different retail shops in the downtown or 10 per 1,000 population. This compares to less than four retail shops per 1,000 population in the city overall.

There are 36 personal care firms (beauty salons, barber shops, etc.) in the downtown, nearly five times more than the city overall adjusted for population size. There are 144 restaurants in the downtown, over six times more than the rest of the city, adjusted for size. There are 13 bank branch operations, five times more than the rest of the city, on a per 1,000 population basis.

The 7,900 residents in the district have an aggregate income in 2021 of an estimated $376 million of which they spend an estimated $40 million on food, $86 million on shelter costs and $17.5 million on recreation.

Downtown Investment

The Downtown London district covers approximately 0.7% of the city's land area but generates 4.4% of the value of city assessment and 5.5% of city taxes collected (excluding education taxes). Annual taxes generated for the city from the downtown nearly doubled from $17.6 million in 1999 to $33.3 million in 2019. The assessed value of properties in the downtown exceeded $1.96 billion in 2019 after a 70% 10-year growth rate[9].

3.3 Marketing – Key Audiences

Downtown London has multiple identified key audiences that the organization needs to interact with in very specific ways. It is imperative that the **Downtown London** brand is visibly recognizable and memorable and that the language used in all marketing messages to the individual audiences is based on targeted value propositions that speak to the specific values that **Downtown London** brings to them.

[9] The assessed value of properties is determined by the Municipal Property Assessment Corporation (MPAC) and the tax rate is determined by the City of London. Additional information on commercial assessments is available from MPAC at https://mpac.ca/en/PropertyTypes/CommercialPropertyAssessments/Howweassesscommercialproperties

DOWNTOWN LONDON RE-IMAGINED

City Council and Staff

As a close and respected partner to the City of London, **Downtown London** needs to be seen as a professional and corporate leader that is an outward facing conduit between the City of London and **Downtown London's** members. The LDBA is a body established by the City of London, mandated with provisions in the Ontario Municipal Act as a Business Improvement Association. This is a formal relationship and needs to be built on mutual trust and respect. Simple and direct communication will help keep Council and staff up to date on all marketing efforts, programs and results and reinforce the economic and social value of **Downtown London.**

Members

The business members of the London Downtown Business Association are the primary reason **Downtown London** exists. As currently described on its website, **Downtown London** is "a connector and champion for the business community". **Downtown London** needs to be seen as professional but approachable organization. Consistency in all marketing materials via inclusive and diverse imagery, authentic language that represents and reflects the current social and cultural times is an important component of the marketing effort.

Downtown Workers

The workforce that comes into the downtown district want to feel a part of a safe, vibrant and progressive community. **Downtown London** should provide a role as a respected leader of all downtown business activities and a champion for the downtown district they work in.

Community Stakeholders (Downtown anchors, agencies, police, etc.)

Downtown London must act as a trusted partner and be seen as a trusted partner with its many community stakeholders. Again, a professional, corporate but approachable persona is important to make community stakeholders feel comfortable in their association with **Downtown London**, reinforcing relationships built on mutual trust and respect.

Developer Community

A tight alignment between **Downtown London** and LEDC is a big advantage to the existing and potential developer community. Residential and commercial developers will benefit from clear messaging on the benefits of doing business, working and living in the district. **Downtown London's** knowledge and understanding of all the factors that developers need to navigate is a big advantage and will address developers' needs for key information in a timely manner. A professional, corporate, but friendly brand that delivers on its vision, mission and brand positioning statement is essential.

Prospective Businesses

To be a part of an emerging market, a progressive, diverse and forward-looking downtown is a prospective business owners dream. Entrepreneurs want a responsive, professional, and trustworthy organization to work with. Their business is their concept that is becoming a reality. They are looking to get results as quickly as possible so all the features and benefits **Downtown London** offers to help them achieve their goals need to be marketed to them.

Media

The media perception can have a very powerful effect on the "perception" of the successes and challenges of **Downtown London** to the entire region. A professional and trustworthy champion persona is essential. Communications need to be consistent in language and tone and regular in deployment to show and share the progressive initiatives and campaigns followed by the results.

London and area residents

Everyone likes to be a part of something that is recognized as successful and positive. **Downtown London** needs to share its successes with the community and greater London population on a regular basis, create interest and "human stories" that can increase resident buy-in. This buy-in can provide a positive halo effect where the individual community members can become ambassadors and champions through their personal networks, who in turn can become influencers to their personal networks and so on. Community members want to be associated with a professional and trustworthy organization.

Visitors

Downtown London has many unique members and partners who offer distinctive experiences for visitors to enjoy, whether they are local, regional, or international. **Downtown London** will need to work with key partners such as Tourism London, event organizers and business members to help people discover, explore and return to the district. It is important that the Downtown London district is recognized as an interesting, fun and exciting location that provides quality experiences for its visitors.

The **Downtown London** name

Through the process of stakeholder engagement in the development of this strategy, it became apparent that there is public confusion regarding the **Downtown London** name from a marketing perspective. It is not clear if the name represents the London Downtown Business Association, the district, all of the downtown core or a community of workers, residents and businesses.

It is critical that "**Downtown London**" is clearly defined in a consistent way, both geographically (district boundaries need to be defined as the same to all official organizations, residents, businesses, visitors), and by name. London Downtown Business Association seems to be awkward when the common vernacular used is in every other instance is "**Downtown London**".

This could be a subtle change by using the existing **Downtown London** graphic with an addition of a BIA word mark integrated to it (the who you are) and supported with tagline of three to five words that explains what you do (your value).

One potential solution would be to use the existing **Downtown London** graphic with the addition of the words Reimagined (as shown on the cover of this document) to be used as a sub brand applied exclusively to all marketing campaigns that pertain to the physical area of the Downtown London district.

COVID-19 impact on consumer habits and sentiment

Consumer habits and sentiments have changed drastically over the past 18 months, even as consumers have adapted to COVID-19, pre-existing consumer behaviours have changed, many of which will impact the pre-existing vibrancy of the Downtown London district.

Shopping patterns for basic needs such as groceries have altered drastically (online shopping for groceries has increased by 59%[10]), which equates to less daily foot traffic, reducing purchasing opportunities and in-store impulse buying. There is movement to continue remote working for many workers post pandemic, potentially reducing demand for commercial buildings in the downtown, and decreases in the daily foot traffic that supports the independent specialty stores, restaurants and bars, and cultural offerings. Remote working will also impact the demand for public transportation.

One of the biggest changes has been the acceleration of digital consumerism, up between 15 to 45% across all categories with 76% of consumers trying a new shopping behaviour[11], this shift to digital consumerism is expected to continue and will disrupt post pandemic behaviours.

The digital disruption has affected every aspect of people's lives, including telemedicine, remote learning (children and adults), video conferencing (professional), video chat (personal), remote working, online entertainment (games), online entertainment (streaming content), social media, digital communications (personal and professional) and online shopping.

Brand loyalty has also been impacted. Consumers are now demanding that organizations demonstrate purpose led advertising/marketing. The emphasis on supporting local businesses is a real opportunity for **Downtown London**. There is also a growing awareness of how businesses operate including supporting a social cause, caring about staff welfare and their efforts to support their customers during the pandemic (e.g. banks that offered mortgage holidays during the early days of the pandemic). It is expected that brand messaging post-pandemic will need to rebuild public confidence in social interactions and economic activity.

The greater appreciation of nature and access to the outdoors during the pandemic is expected to last well into the future as it is tied the increase of awareness of the benefits to general health and wellness (physical and mental) to help deal with the anxiety caused by the pandemic.

Consumers prefer digital communications

The digital acceleration due to COVID-19 has disrupted traditional ways of doing business as usual. There has been a shift to customer service and preferences for communications that involves typing or texting rather than talking on the phone. Consumer preferences are shifting as technology advances, but the key is providing immediate interactions that are faster, more efficient and, in many cases, automated forms of communication (e.g., chatbots, intelligent voice assistants, texting).

Regardless of how a consumer wishes to receive information from **Downtown London**, the consumer wants to feel like a valued member of the **Downtown London** community and experience. **Downtown London** needs to be consistent with its communications, making sure it

[10] McKinsey & Company
[11] McKinsey & Company

stays true to its vision and mission statements, brand proposition statement and the specific value propositions to ensure the brand continues to be recognized as a professional, respected, and trusted leader.

4 Strategic Priorities

This strategy recognizes that the destinies of the downtown and **Downtown London** are intertwined, and **Downtown London** is an important contributor to the health and vitality of the downtown. The strategy makes a distinction between the role of **Downtown London** and other community partners and stakeholders in contributing to positive change and a prosperous downtown.

Strategic Priorities are those elements that, when addressed, have the potential to make a significant contribution to moving the organization forward. Failure to address these areas would limit the organization's ability to reach its full potential. The strategic priorities detailed below are those issues and opportunities that must be addressed to be successful.

The following strategic priorities were developed as the culmination of the work in Phase 1: Research and Analysis and Phase 2: Stakeholder Engagement. The strategic priorities were reviewed and refined through a strategic priorities workshop with the LDBA and MSL boards and **Downtown London** staff on July 21, 2021.

Figure 6: Strategic Priorities

The strategic priorities provide the foundation for the vision, mission, values, goals, objectives, and strategic actions that will constitute **Downtown London**'s Strategy. These priorities will provide the common language and direction for **Downtown London** and its partners.

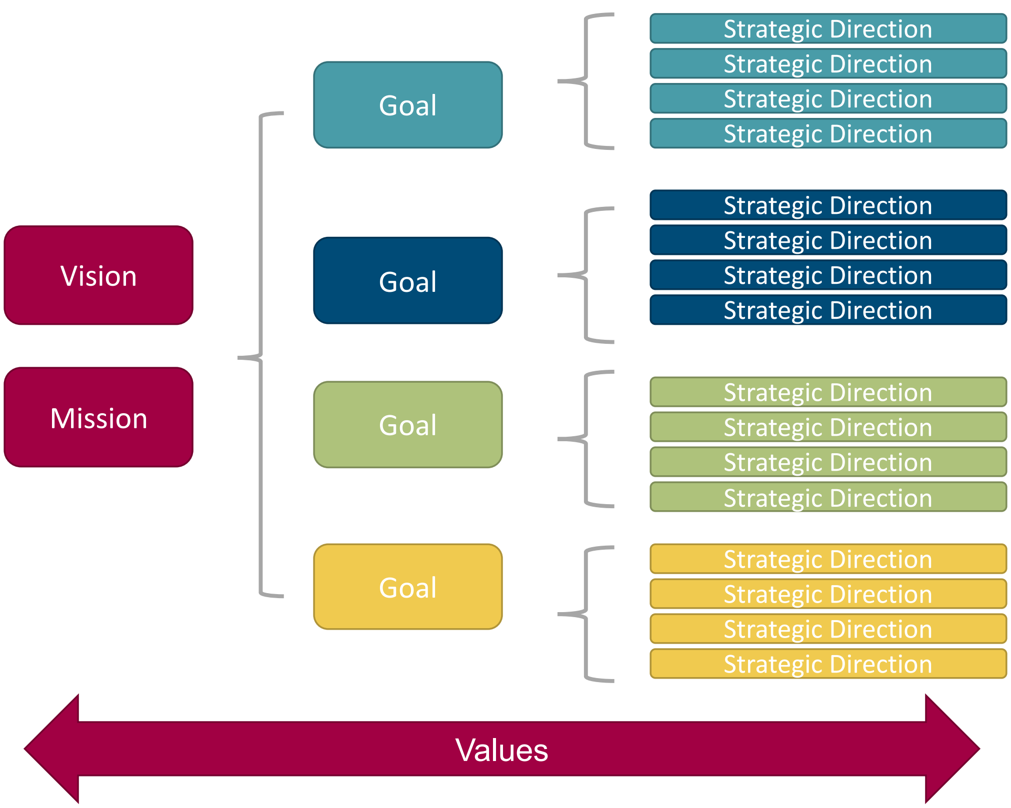
5 Fundamentals of Downtown London's Strategy

The **Downtown London** Strategy sets the course for the organization's future direction and efforts, developed through a robust strategic planning process. The strategy is based on the following fundamental elements:

- The **Vision Statement** provides a future oriented declaration of **Downtown London's** image of success as established through earlier stages of the strategic planning process. It answers the question of where the organization wants to be in the future.
- The **Mission Statement** is the reason **Downtown London** exists. This action-oriented statement describes what **Downtown London** does and why.
- **Values** represent the core beliefs that inspire **Downtown London's** choices. They guide how it operates and deals with others in pursuit of the vision.
- **Goals** are the broad aim or end-result **Downtown London** wants to achieve in support of the vision.
- **Strategic Directions** are the foundational ideas or actions required to achieve the goals.

Together these elements provide the detailed framework of where the organization is going, and the actions it will take to get there.

Figure 7: Strategic Plan Elements



6 Vision, Mission and Values

6.1 Vision

London has all the attributes of a leading North American city. It has a highly educated workforce and one of the top talent pipelines in North America as measured by the number of university and college students per 10,000 population. London is one of the fastest growing urban centres in Canada. As the fight for global talent and business investment intensifies in the coming years, London is well positioned to prosper.

A leading North American urban centre needs a thriving downtown. It is the economic heart of the city where tens of thousands of entrepreneurs and workers concentrate in an area representing only 0.2% of the metropolitan area geography. Collisions spark innovation. Diversity breeds new ideas. We aspire for the downtown to reflect the best of the city and its people. As the city looks to be more progressive, the downtown must lead the way. As the city opens itself to the world and attracts people from far and wide, the downtown must lead the way. As the city looks to build a competitive, 21st century economy, the thriving heart of the city must lead the way. It is a magnet for people to live, work and be entertained. As goes the downtown, so goes the town. **Downtown London** is uniquely qualified to represent the interests and aspirations of the businesses and people in the downtown district.

Vision Statement

Downtown London represents a thriving, progressive, and welcoming district in the heart of the city. The people that own businesses, visit, work, learn, and live in the district are the essence of its vibrancy and diversity.

6.2 Mission

There are many organizations that contribute to the success of the downtown. City Hall understands the importance of downtown to all of the 430,828 residents of the city. Public safety, health and social organizations are key to a prosperous district as are the top entertainment venues and educational institutions. Business and economic development organizations such as the Chamber of Commerce and London Economic Development Corporation are important contributors to its success. But the only organization singularly focused on the downtown district is **Downtown London**. It uses the BIA levy to further the interests of its members and to influence and foster a stronger economy and growing population in the downtown.

Downtown London is a membership organization and as such, must reflect the priorities and aspirations of its members. Fundamental to the success of its members is a thriving economy, growing residential population and an expanding tourism sector. **Downtown London** must use the resources provided to it to foster a strong and thriving downtown.

Mission Statement

Downtown London represents and supports its members, fostering a strong, thriving downtown in the economic and cultural heart of the City of London.

6.3 Values

Values are what drives the organization. They animate staff and guide everything **Downtown London** does. **Downtown London** must provide leadership in support of downtown development, but it is not alone in contributing to its success. There are many organizations that influence the success of the district and **Downtown London** must work closely with them on common priorities.

The downtown must be a place that reflects and adds to the diversity of the city and wider metropolitan area. **Downtown London** strives for diversity in its population, its base of entrepreneurs, as well as in its arts and culture. People young and old and from all walks of life should be attracted to the downtown. Finally, prosperity is a shared value for **Downtown London's** members, downtown residents, and the whole city.

Downtown London's Values

- **Member support:** We assist our members to achieve success through promotion, programming and advocacy with a focus on the common good of the membership.
- **Leadership:** We are uniquely positioned to speak as a catalyst for positive change, constructive advocate, and voice of the downtown.
- **Collaboration:** We can achieve more by supporting and working cooperatively with our community partners on our shared goals.
- **Diversity:** The variety and interplay of people, business, arts and culture in the district provides a richness of opportunity and experience unparalleled anywhere else in London.
- **Prosperity:** The economic success of our members and the district reflects and impacts the economic health of the whole city.

7 Goals

	Goal	
	1	**Welcoming, safe and vibrant downtown**
	2	**Diversified economic base**
	3	**Champion, catalyst and liaison for the downtown**
	4	**Strong member engagement and support**

8 Goals and Strategic Directions

1 Welcoming, safe and vibrant downtown

Objective: Plan and program efforts that provide a safe atmosphere that attracts and welcomes visitors and encourages new and continued business investment in the downtown.

The health and wellbeing of **Downtown London** and its members is dependent on providing a safe and welcoming environment. The prevalence of social issues concentrated in the downtown is top of mind for all the participants in the surveys, focus groups and interviews conducted as part of the community engagement, Phase 2 of the strategic development work (see appendix). The safety and security of the downtown businesses, visitors, office workers and residents must be addressed to allow **Downtown London** to realize its full potential.

Downtown London must be at the tables with community leaders, debating these issues, contributing to the discussion and advocating for action by the appropriate organizations. It can contribute unique insights on behalf of its members by tracking and reporting on their first-hand experiences and observations through apps or social media channels. As an organization that is connected with other BIAs and downtown-focused organizations across Canada and beyond, **Downtown London** has the capability to access information about downtown safety and welcoming initiatives and be a thought leader in discussions about what could be done in London's downtown.

Downtown London can complement these advocacy efforts in several ways. The most obvious way is to increase number of people in the downtown through programming and promotion which can be a deterrent for negative behaviours. It can also contribute to the district's overall appearance and function as a vibrant, safe and welcoming downtown through ongoing beautification initiatives. **Downtown London** should actively engage in discussions with landlords who own underutilized or vacant buildings to demonstrate the potential of those buildings.

Downtown London also has an important role in educating its members on how to appropriately respond to incidents in the downtown. By working cooperatively with police, by-law officers and other partners, **Downtown London** will be better able to identify initiatives that could deter some problems from occurring in the first place and create more effective means of addressing existing challenges.

Special events and mini activations will continue to be important tools to add interest and excitement to the downtown experience that can't be found at a shopping mall. **Downtown London** should work with event organizers to provide opportunities for its members to support and leverage these activities to drive traffic into their operations. **Downtown London** should encourage individual business owner/operators to collaborate on joint events that build traffic and cross-promote a collection of businesses. Ideally the event calendar will provide something new for consumers and visitors to see and do on a regular basis. Events should also be used to drive traffic during off-peak times and seasons to continue the energy and excitement all year round.

1. Welcoming, safe and vibrant downtown

Strategic Directions

1.1. Work with members, activation partners, City, and downtown commercial and residential property owners to deliver/sponsor a variety of culturally diverse events and activations to attract people and create vibrancy in downtown.

1.2. Work with City, London Police Services and other community services providers, to implement the Core Area Action Plan and other strategies and initiatives aimed to create a safe, clean and vibrant core.

1.3. Work with other BIAs, Ontario Business Improvement Area Association, International Downtown Association and others to share information on best practices and projects that could be successfully implemented in downtown London.

1.4. Work with commercial landlords to find ways to better utilize vacant storefronts for short-term uses.

2 Diversified economic base

Objective: Grow and diversify the businesses, residents, services, and activities that contribute to the economic vitality of the district.

Downtown London is home to many of the city's largest employers. It is where more than 40% of professional services workers are located. The growing information technology (IT) cluster is concentrated in the downtown as is the finance and insurance sector. Before COVID-19, an estimated 30,000 plus people worked in the geographic area covered by the LDBA and most of them were office workers.

Across North America, successful downtowns are becoming more diverse. They are attracting more residents and building a permanent local market for retail, entertainment and personal services. They are expanding their role as entertainment hubs and as magnets for tourists. They are centres of arts and cultural activity, and they are expanding their role as education hubs. People from across the metropolitan area and beyond come downtown to work, study and play.

It is still unclear how the pandemic might have permanently changed how people work particularly in office environments. Some companies will go back to the old model of concentrating employees in a central office location. Some will allow more working from home. Many will offer their employees hybrid work environments where employees work partially from home and partially in a company office.

The Downtown London district will continue to be a locus for head office, professional services, information technology (IT) and other office work. In fact, there are opportunities to continue expanding these activities. As is developed further below, the London CMA is expected to grow its workforce by 17,500 between 2020 and 2028, with many of these jobs in the industries that are concentrated in the downtown.

One exciting opportunity involves the expansion of post-secondary education in the downtown. The student population can be an important source of customers, residents, employees and programming, while adding vitality and energy to the downtown. According to Statistics Canada, in addition to Fanshawe College there are 11 other post-secondary education and training providers in the downtown including three computer training providers, two professional and management development schools, two fine arts schools and two language training centres. The potential of a stronger partnership with Western University bodes well for the expansion of post-secondary education in the downtown.

To diversify the economic base, the district will need more residents and the services they would like to see in the downtown. More education services, more personal services including health care will also be needed to support the residential population.

Table 1:Focus areas for downtown economic diversification

Residential: Grow and diversify the mix of residents in the downtown including more families with children.	**Education:** Attract more education downtown including Western University and other training activities.
Health care: Ensure downtown residents have access to a full range of health services and that the downtown is attracting people to access these services.	**Personal services:** Ensure downtown residents have access to a full range of personal services and that the downtown is attracting people to access these services.
Retail: Attract more retail activity to the downtown to serve the local population (e.g. grocery store) and to attract people downtown to shop (niche, compelling retail).	**Arts, culture & entertainment:** Expand the downtown's role as an arts, culture and entertainment hub. Part of this could include attracting more film production to the downtown.
Restaurants: The downtown is already home to many of the top restaurants in the city. Reinforce and leverage the variety and quality of downtown restaurants through **Downtown London's** marketing efforts.	**Accommodations:** Continue to build the downtown's role as an accommodations hub for the CMA.

Grow and diversify the downtown population

The City of London is forecasting strong population growth in the wider downtown of over 2.3% per year between 2019 and 2029, tapering only slightly to 1.8% per year from 2029 to 2039. Right now the population is highly concentrated compared to the CMA overall.

There are nearly three times as many people aged 25 to 29 living in the downtown compared to the CMA overall (as a share of population). Overall, nearly half of all downtown residents are aged 20-34[12]. According to Environics, 62% of all downtown households are "Grads & Pads" defined as young city dwellers all living in apartments without high incomes because they are mostly recent graduates.

Over 18% of the downtown residents are "Silver Linings" defined as older mature singles, widows and divorced. Average income in this group is slightly below average because a large share of this cohort is retired.

The other three demographic groups with a well above concentration in the downtown are Sunset Towers (older retirees); Urban Digerati (young, tech savvy professionals); and Striving Startups (predominately young singles with active social lives). These five demographic groups account for 97.3% of the population living in the downtown.

[12] Source: Environics Analytics' estimate for 2021.

Other cities across North America are focusing on attracting young families to the downtown or creating an environment such that when young professionals decide to have children they will stay in the downtown.

There are important ways to encourage young people to stay in the downtown (or move to the downtown) as they are expanding their families including providing appropriate school facilities, playgrounds and other family-friendly infrastructure and services. Ideally the downtown will continue to support and attract a broad mix of people including immigrants, visible minorities, etc. as well as young, middle aged and older residents.

Downtown London can leverage and support the growing number of residents in the downtown by promoting the benefits of living in the district and providing a welcome program on behalf of the members for new residential developments.

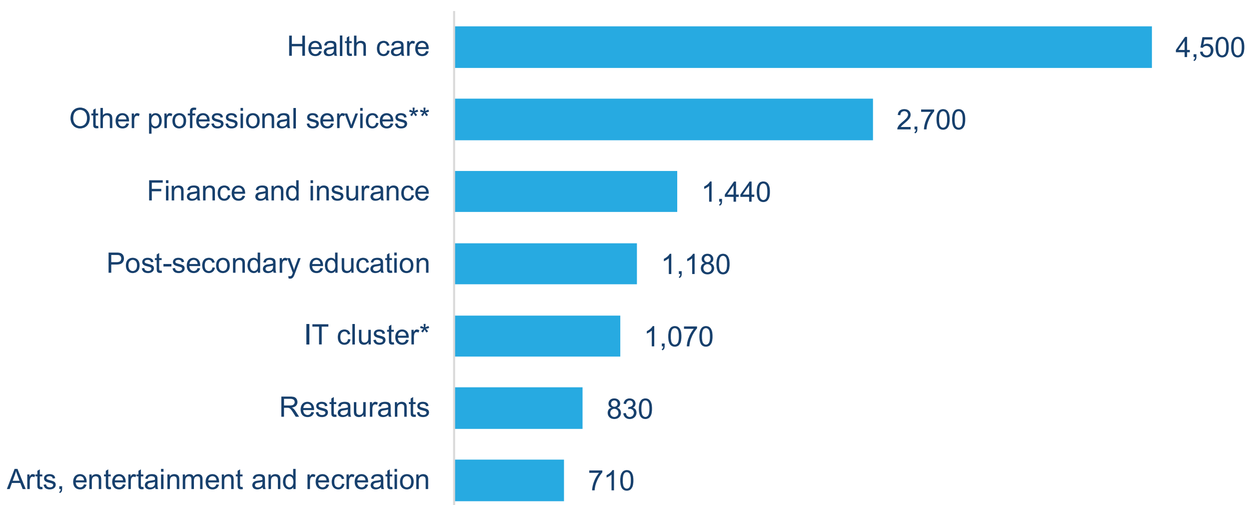
Diversify business investment in the downtown

London is one of the faster growing cities and urban centres in Canada. According to EMSI, the London CMA is expected to add another 17,500 jobs (net) between 2020 and 2028, a robust 7% growth rate. Much of this investment could be attracted downtown. EMSI is expecting a net growth of 4,500 jobs in health care.

The information technology (IT) cluster is expected to add nearly 1,100 jobs by 2028; an 18% growth rate. The majority of IT employment is already in the downtown.

Other professional and administrative services sectors such as accounting services, management consulting, scientific research and development and advertising firms are all expected to add significant employment over the next few years. Even the post-secondary education sector is expected to add nearly 1,200 net new jobs; many of these could be in the downtown.

Figure 8: Forecasted net growth in employment, 2020 to 2028 by industry, London CMA



*Includes software developers, IT services firms and data hosting.
**Excluding IT companies but including administrative services.

Source: EMSI.

In addition, LEDC is working to attract more film production to the region and the downtown is well positioned to host much of that activity.

What is **Downtown London**'s role to support the attraction of industry downtown? As the champion of the downtown, it can help develop the value proposition for downtown investment. It can organize meetings and make the connections needed to get deals done. It can survey its member companies to determine who has potential for growth and what support they need. While it is not the role of **Downtown London** to develop an investment attraction team for the downtown, it should work closely with those organizations that are working to attract investment and firms to the region such as LEDC, real estate developers and others. The **Downtown London** website should provide a directory of available commercial properties with links to the appropriate realtor or developer.

Diversify the downtown economy by supporting new business incubation

There are a number of organizations in the downtown that support new entrepreneurs including the London Small Business Center, Tech Alliance and the RH Accelerator. Fanshawe College offers the LEAP Junction program to support new entrepreneurs. Beyond downtown there are other organizations that work to foster more startup companies in the community including the Morrisette Accelerator at Western University.

It's important for the downtown district to be a place of entrepreneurial creativity. The rate of entrepreneurship among residents in the downtown is slightly lower than the CMA overall (10.5% self-employed as of the 2016 Census).

Most of the entrepreneur support services listed above focus on targeted industries whereas the downtown should be home to innovative new entrepreneurs in a wide variety of sectors including retail, restaurants, personal services and entertainment.

The downtown needs to be an environment where ambitious entrepreneurs are attracted to start businesses. There are many ways to foster an entrepreneurship-friendly environment including offering low-cost spaces to try out new ideas, pop-up markets, training and service that support entrepreneurs regardless of their industry, etc.

Diversify the economy by attracting more services wanted by downtown residents

As the downtown population continues to grow and diversify there will be a need for more services. Residents have already identified the need for an additional grocery store and other smaller retailers. They also want to have a full range of services such health providers, personal services providers, entertainment and recreation.

A survey completed for the development of this strategic plan found a large share of London residents would like to see more grocery options in the downtown, artisanal shops, arts and cultural activities, etc. (Figure 9).

Figure 9: Types of businesses London residents would like to see more of in the downtown (% of total respondents)

Source: Survey of 2,225 London residents (April-May 2021).

While the population in the Downtown London district is slightly under 8,000, there are over 40,000 people who live within approximately a two-kilometre radius of the downtown. This population is much closer to downtown services and amenities compared to those offered on the city's periphery.

Diversify by expanding the downtown's role as a centre for entertainment: events, music, arts and culture

It is imperative that coming out of the pandemic, downtown district comes alive again, a vibrant place with thousands of people walking through the streets, doing yoga in the park, and frequenting the downtown shops, stores, restaurants and bars. Events and activities that compel people to come downtown and other efforts to get visitors to stay longer will help support this vision of a vibrant downtown.

Extend and leverage downtown trips

People come downtown for many reasons. They come to work, do business or access professional and personal services firms. They come to shop or eat at one of the city's top restaurants. They come to study at Fanshawe College or some other training school. They come to take in a show or sporting event. They come to visit the many tourism venues. On average, everyday tens of thousands of people flock into the downtown. An important objective of **Downtown London** must be to keep them while we have them. Instead of going straight home after work, why not stick around? Instead of attending the concert and then going home, how can **Downtown London** compel people to flood out into the streets? Workers should be shoppers. Shoppers should also be diners. Concert goers should extend their stay in the downtown. Tourists and locals should be encouraged to engage in the full downtown experience. They may come for one reason, but they should stay for many more.

How does **Downtown London** facilitate this? By creating an environment that feels safe and welcoming. By building stronger relationships and encouraging cross-promotion. By fostering special events and activities that give visitors a reason to come downtown and stay longer. By working with downtown companies and service providers to bundle services; shop and eat, take in a show/shop in local boutiques, afterwork promotions, etc.

2. Diversified Economic Base

Strategic Directions

2.1. Support the City and residential developers' efforts to grow and diversify the downtown population and advance live, work, play opportunities for the downtown.

2.2. Working with community and economic development partners, help diversify business mix and investment in downtown.

2.3. Explore and implement joint community initiatives for business/retail incubation, acceleration and/or entrepreneurship programming in downtown targeted to post-secondary students, BIPOC communities and new business start-ups to grow and stay downtown.

3 Strong member engagement and support

Objective: Align marketing and business assistance to amplify member success.

Marketing the downtown as a shopping and commerce district is one of the core responsibilities of **Downtown London**. Establishing a well-defined corporate brand is essential to guide the organization and reinforce its core value to its patrons, strategic partners, members and stakeholders.

The campaigns should incorporate authentic storytelling to engage people on a human level, evoke an emotional response and encourage a collective interactive experience that will be shared across all digital platforms.

One technique for layering the experiences and elements that define **Downtown London** is through the storytelling and itineraries such as date nights or celebrating the home team. These itineraries would expand on a recognized and valued experience in the downtown and profile other activities, shops and dining options, extending the visit and expenditures. (A sample itinerary is included in the appendix.)

Downtown London needs to showcase all of its features, benefits and opportunities in a consistent, attractive way where the appropriate prospect will be expecting to find it. **Downtown London**'s marketing should include smart and intelligent ways to reach people and make them remember BIA's brand promise and the downtown experience. The whole district should serve as a canvas, taking advantage of places throughout the downtown that could carry a message including empty buildings, storefronts, the roads and sidewalks, park benches, parks and public spaces, billboards, garbage cans, street flags, members shop windows.

The surveys conducted through this strategic planning process showed that parking is perceived as a problem in the downtown district even though there is a surplus of parking spots. **Downtown London** can help to address this issue by providing maps and information about parking costs online. In the longer-term, additional wayfinding can make parking easier to find.

Downtown London can also help to disguise vacant store fronts by working with the property owners to fill empty display windows with art or goods from other downtown businesses. **Downtown London** should consider a window wrap program that could further the downtown brand while promoting a new use of the building and providing contact information for the realtor or owner.

The use of digital marketing and applications accelerated during the pandemic and is expected to continue. **Downtown London** needs to continue to expand and enhance its digital marketing efforts to keep pace with the growing digital sophistication of its target markets. The online member directory and marketplace should be enhanced to make it easier to navigate by business category and district. The social media programming needs to become more strategic; incorporating key messaging, themes and profiling brand ambassadors to tell **Downtown London**'s story.

Downtown London should also celebrate business investment and expansions in the downtown district through corporate updates and consumer facing marketing, amplifying the good news as another sign of progress towards a more vibrant and prosperous downtown.

Table 2: Potential consumer marketing themes

	A slice of urban life: This campaign would highlight the culturally diverse restaurants, cafes and bars that give the **Downtown London** its distinctive feel can be used as a connective theme to show the inclusiveness of the downtown core and project the cultural "coolness factor" of the downtown lifestyle.
	Travel the world in Downtown London: In an era dominated by Amazon.com, **Downtown London**'s specialty stores offer the consumer a unique in-person experience. They can enter a completely different environment, interact with interesting individuals, and find a distinctive purchase. There could be many ways to develop marketing campaigns to tie together a collective shopping "experience" with multiple stores, restaurants, cafes and bars.
	Make a day of it: Visitors love to have a day full of experiences mapped out for them. Developing itinerates developed to please specific interest such as arts and culture, history, music, outdoor adventures and shopping. During the trip the visitor will also need other downtown amenities.
	Downtown is fun: Whether it is to watch a sports event at Budweiser Gardens, or a performance at the Grand Theatre, many people want to be able to experience live events again. Although some people remain a little more cautious, the pandemic has shown that there are different ways to enjoy an event such as a hybrid experience utilizing online "entrance tickets" and curbside pick-up or delivery for food and drink.
	Find Your Space: A multi-level campaign could serve everyone's information requirements. From letting downtown residents and workers know about city construction real-time impacts via social media, to promoting the "Honk" app that directs the driver to the nearest available parking and lets them compare the fees.

Visual content, both still photography and videos, is critical for digital marketing and **Downtown London** needs to continue to expand the variety and form of digital materials including user generated content. **Downtown London** should continue to help its members adapt more digital marketing techniques through programs like Digital Main Street, digital marketing workshops and training and sourcing and sharing photographers and videographers services at the individual business level.

Downtown London should increase the use of sub-districts, celebrating the distinct character and offerings of these smaller, more human-scaled areas within the **Downtown London** district. The sub-districts should be profiled through suggested itineraries, sub-district themed promotions and events and wayfinding.

With over 1,100 **Downtown London** members, communications with the members is an important consideration to ensure the members are informed, engaged and are accessing **Downtown London's** services and supports to further their success. **Downtown London** needs to provide information on its programs, services and activities through a variety of communications tools so that members can access the information in the form that is most convenient and accessible for them. For some members it may be through social media. For others it will be an E-newsletter and for others it may be through the website.

The many independent business owners in the district could benefit from a variety of services and programs to improve their operations. **Downtown London** should continue to work with partners such as the Small Business Centre, Tech Alliance and others to provide programs on a wide range of topics from marketing and human resources to E-commerce. The community survey indicated the importance of attractive windows and store displays and **Downtown London** may want to incorporate training, workshops or other services to assist members to build their visual presentation skills.

It is also important to track the interactions with the **Downtown London** members. The effective use of a CRM system will assist in supporting member services, tracking program participation, and identifying trends by issue and geography across the district.

Downtown London can expand its understanding of the people that shop, dine, work, visit and live in the district through public perception and intercept surveys. Conducting these surveys on a regular (annual or biennial) basis will allow **Downtown London** to understand demographics and shopping trends. **Downtown London** should also continue to leverage the significant data resources available through the City of London, tracking consumer demographic data and trends.

3. Strong member engagement and support

Strategic Directions

3.1 Provide promotional support to members and continue to market the downtown as a business, shopping, dining and cultural district.

3.2 Respond, track and deploy appropriate resources that address members' issues and opportunities.

3.3 Provide effective member services, networking and information sharing tools and tactics, highlighting important member topics such as merchant best practices.

3.4 Explore and expand LDBA member activities for staff and board members that proactively supports member needs and opportunities.

4 Champion, catalyst and liaison for the downtown

Objective: Initiate and leverage collaborative efforts to advocate for and achieve shared goals with the organizations contributing to Downtown London's success.

The corporate brand must clearly define the value **Downtown London** provides to its identified external key audiences (there are ten). **Downtown London** needs to be recognized as a respected, trusted community leader; a promoter, a customer service organization, an advocacy organization and event supporter/ sponsor.

Downtown London must address the confusion with its existing brand. The public does not understand the subtleties between the geography of the downtown district and a business improvement association that speaks for and promotes the businesses within the district.

The corporate brand needs both a strong, contemporary corporate graphic logo that will work well across all marketing platforms, especially social media. The move to more digital marketing means the logo must use a simple and strong design as it will be very small in some uses. A simple tagline of no more than five words should support the graphic to reinforce exactly who **Downtown London** is and what it does. The logo and tagline will be defined by the approved vision, mission statement and brand positioning statement along with individual value propositions that align with and speak authentically to each identified audience that defines exactly what value **Downtown London** offers to each of them.

The brand needs to be friendly and inviting but sophisticated enough that people think of **Downtown London** as a respected partner that works collaboratively for the betterment of all in the downtown. Once the building blocks of the corporate brand are well-defined, it is time to market the messages.

Downtown London can define and differentiate its character or personality through seamlessly layered marketing campaigns and messaging. It can support this character-building effort with campaigns that share how **Downtown London** is moving towards its aspirational vision of a **Downtown London** as a dynamic, inclusive city centre, with diverse neighborhoods of progressive minded, educated, and energetic people who value a unique and vigorous community to live, work, shop and play.

The clearer the message(s), the more buy-in **Downtown London** can expect from its members and partners. **Downtown London**'s members and partners they should all be valued as brand influencers and ambassadors.

There are many organizations that share responsibility for and contribute to the vitality of London's core including the following:

- City of London (various departments)
- Anchor establishments (Budweiser Gardens, Covent Garden Market, RBC Place, Grand Theatre, etc.)
- Community Builders (LEDC, Tourism London, Tech Alliance, Small Business Enterprise Centre, London Chamber, Arts Council, etc.)
- Post-secondary Educators (Fanshawe College, Western University, etc.)
- Arts and culture community
- Corporate offices/ employers
- Developers/ real estate professionals/ business owners
- Event organizers
- Tourism organizations and operators
- Other London BIAs

The roles and responsibilities of **Downtown London** and the many other community stakeholders needs to be clearly understood and communicated to avoid confusion, and support collaborative efforts of mutual interest. **Downtown London** needs to resist the potential for “scope creep” and assuming responsibility for actions that are most appropriately managed by others.

Downtown London should use the adoption of this strategy as a platform to formalize its relationships with partners using tools such as terms of reference for committees, memorandums of understanding and general agreements of the distribution of responsibilities. These relationships are so critical to the success of **Downtown London** and its ability to achieve its vision, that the organization may consider establishing a new position whose primary responsibility is to manage and maintain these relationships.

The strategic actions under this goal are divided by key partner to reflect the unique roles and responsibilities of each group.

The City of London

Downtown London’s relationship with the City of London is paramount to the success of the organization. The city is responsible for many of the services necessary for a healthy and functioning downtown including economic development, roads and sidewalks, public transit, planning and bylaw enforcement, police services, social services, parks and recreation and garbage collection.

This is an opportune time to establish **Downtown London**’s Strategy. The city has recently completed a reorganization, with a greater emphasis on economic development and planning. In this new environment there will be opportunities to build greater connections with City Council and expand the connections between **Downtown London** and city staff across departments to create a better understanding of the individual responsibilities and mutual areas of interest. The Core Area Action Plan (CAAP) is the primary city document outlining the city’s vision and directives for the downtown. **Downtown London** needs to support and monitor the city's progress on the actions outlined in this plan.

Downtown's Anchors

The downtown district is home to some key strategic assets or anchors including:

Budweiser Gardens: An arena and entertainment venue and home to the London Knights, (an Ontario Hockey League Junior A team)

RBC Place: A conventions and meetings facility hosting national and regional conferences and business events

Covent Garden Market: A year-round market including fresh local produce and foods and dining

The Grand Theatre: A regional live performance venue

Museum London: Incorporating rotating exhibits and permanent museum collection and dining facilities

Central Library: The hub of the City's library system and meeting space

These anchors drive huge numbers of visitors and workers into the downtown. Some also have large promotional budgets that far exceed that of **Downtown London**. Leveraging the support of these organizations may be one of the greatest opportunities to grow traffic in the downtown district. **Downtown London** should explore options for a more formal relationship with these and other anchors such as associate membership, friends of programs or sponsorship, to recognize and expand the significant contribution they make to **Downtown London**.

Downtown London should be recognized as an authority on downtown issues and opportunities and an advocate for its existing and prospective members.

Downtown London represents its 1100 plus members including shops, restaurants and cafés, services, offices and building owners located in the heart of the City of London. As the voice for its member and downtown issues, **Downtown London** must clearly define its role, its position, and the benefits for the various target group.

Target Group	Priority BIA Deliverables
Business Operators	Improved atmosphere and environment. Capital improvements and activities assist in retaining more local customers and attracting more visitors. Cost savings via integration of capital funding and promotions.
Property Owners	Creating a vibrant economic environment leading to increased demand for retail and office space. Decreased vacancy rates and increased property values.
Surrounding Neighbourhood	Physical improvements, enhanced ambience. Increased local shopping choice. Increased employment. Clean up and safety programs. Community events.
Broader Community	Encouraging tourism and investment in wider community. Increased local shopping choices. Increased business activity resulting in greater tax base. Community engagement and pride beyond the BIA boundaries.

Downtown London needs to communicate and reinforce its core responsibilities. It will need to gain and build the confidence of Council and staff, demonstrating that it is a professional and effective organization whose positions and insights warrant attention and consideration.

To effectively advocate for its members, **Downtown London** must be recognized as an organization that can be relied on as a trusted partner and authority.

Downtown London needs to build the awareness and understanding of the important role the district plays in the overall health and well-being of the city. **Downtown London** will also need to make clear the connection between the economic and social benefits of downtown and **Downtown London**'s role as a key contributor to that success.

As noted during the stakeholder engagement, **Downtown London** has struggled with gaining consensus among its members. As an organization, **Downtown London** needs to establish who has the authority to speak on behalf of the membership as a whole and what the organization stands for.

Some common areas of concern emerged during the strategic planning process that could be candidates as advocacy priorities. The **Downtown London** board should study these common themes and, in consultation with the membership, select two to three key issues for development in an advocacy plan. These issues should reflect the long term, strategic advocacy goals of the membership as opposed to individual of one-off issues.

To be effective, **Downtown London**'s advocacy plan requires a clear statement of the issue, a goal, well-reasoned evidence and data supporting its position and recommended actions to successfully address the issue.

Developing an Advocacy Plan

An advocacy plan seeks to advance a position or influence change on behalf of its constituents. An advocacy strategy includes the establishment of goals, target audiences, key messages, supporting data and monitoring.

Downtown London's relationship with the City and other stakeholders requires a diplomatic and respectful approach that seeks to inform and build on mutual goals and interests. **Downtown London** should carefully determine the organization's top two to three issues for focused efforts. The following list, provided in no particular order, provides some potential advocacy goals for further discussion and assessment by the **Downtown London** board and members.

Potential Advocacy Goals

- Implementation of the Core Area Action Plan
- Implementation of City plans that align with **Downtown London**'s vision and mission e.g., the Music and Entertainment District Strategy.
- Policies that limit or reduce the number of on grade parking lots
- Policies that discourage long-term vacancies and enforce building standards
- A coordinated response to social issues in the downtown
- Decentralizing social services throughout the City of London
- Accessing better and more timely information on the Crisis Response Team's activities
- Expanding the City's Community Improvement Plan boundaries to include all properties in **Downtown London's** geographic boundaries
- Establishing a non-profit corporation responsible for commercial investment attraction in the downtown
- Establishing more safe and affordable housing options across the City, including in the downtown

4. Champion, catalyst, and liaison for the downtown

Strategic Directions

4.1. Identify and leverage strong relationships with key strategic partners, community and business organizations for joint program development, economic development, advocacy, research, procurement of products/services, etc.

4.2. Establish **Downtown London** as the authority for current and up to date downtown information, and trends to reinforce the social and economic value of the downtown district.

4.3. Distinguish **Downtown London** (the organization) from downtown London (the geography) and clearly communicate the roles the organization plays or does not play to support the downtown.

4.4. Create and build a positive and professional brand and image for **Downtown London** as a trusted organization acting on behalf of its members.

4.5. Establish an advocacy plan for key strategic issues/opportunities that support LDBA membership as a whole and help to influence, political policy through evidence-based business cases.

Supporting Considerations for LDBA Board and staff

Objective: To provide consistent and focused direction on Downtown London's priorities and actions aligned with its vision and mission.

Downtown London business members, board members, the public and the media have all expressed confusion on the roles and responsibilities of **Downtown London**, the City of London, and the business members. Over the years **Downtown London** has assumed responsibility for tasks that are beyond the scope of a typical BIA and are more suited to the individual members or the city itself. **Downtown London** needs to focus on those activities that are the clear responsibility of a BIA first before assuming additional responsibilities.

The general functions of a BIA as outlined in the Ontario Municipal Affairs and Housing BIA Handbook are to:

- Oversee the improvement, beautification and maintenance of municipally owned land, buildings and structures in the area beyond that provided at the expense of the municipality generally
- Promote the area as a business or shopping area[13]

Downtown London's current structure adds to the complexity of reporting and decision making for the organization. A one board governance model would allow for greater focus and board accountability.

Downtown London should also place greater emphasis in the collection, analysis of data to support strategic decisions using member generated data and recently expanded data sources from the City of London. The board should consult with its members to ensure **Downtown London**'s actions are aligned with member needs and aspirations. An annual survey of the membership will provide benchmarks and identify opportunities to continue to improve member services. The board should also consider regular listening tours to provide more context and detail to the member consultation.

MainStreet London's role and responsibilities have been changed dramatically over the year. It is no longer operating as it was originally conceived. **Downtown London** should explore opportunities to establish a separate organization with an arms-length relationship with the City of London, responsible for business attraction and investment in the downtown. The enforcement of bonusing restrictions as laid out in the Ontario Municipal Act appears to have changed over the past several years. **Downtown London** should work with the City of London to clearly define the legal considerations to make an informed decision on the appropriate model to support investment attraction in the district.

Downtown London needs to leverage the skills and insights of its membership to reimagine its role and purpose in a post-pandemic era and a time of significant transition and upheaval. The active participation of **Downtown London**'s members and community stakeholders will be critical in ensuring this transition. The anchor organizations in the downtown district are responsible for driving

[13] Ontario Business Improvement Area Handbook, 2010, https://www.ontario.ca/document/business-improvement-area-handbook

traffic into the region. Their contribution to the success and vitality should be leveraged and expanded through a more formal relationship such as a 'friends of' or associate membership category.

Downtown London members should be encouraged to contribute as committee members addressing core interests/functions of **Downtown London** including safety and security, beautification/cleanliness, marketing and special events.

The board should be armed with data to support evidenced based decision making, inform its marketing programs and track performance and support its advocacy efforts.

As the 'heart' of the downtown, and a district made up of individual and local businesses, **Downtown London** needs to be recognized as an organization that not only believes in corporate social responsibility (CSR) but is seen actively providing direct support and helping its members and district community to participate and contribute to its social programs. **Downtown London** should focus on supporting social issues that are connected to its character and position in the community and those issues that are important to its consumer base such as diversity, sustainability, homelessness, mental health, and poverty. Establishing diversity and social responsibility goals should be incorporated into **Downtown London's** brand positioning statement, adding an organic and holistic component to create a forward-looking organization that is economically strong and sustainable for the future.

Supporting consideration

- Operational reorganization and 5-year plan and align existing and new staff resources that with strategic goals
- Develop annual staff work plans and budgets that are aligned with strategic goals. This includes moving to bimonthly to quarterly reporting by the Executive Director to monitor progress (eg. dashboard, etc.)
- Shift to one-board governance model for **Downtown London** (LDBA) and explore opportunities for Main Street London as a separate organization focused on business recruitment and investment attraction and other areas that can benefit downtown.
- Consider (re)establishing board committees focused on 1) Governance 2) Advocacy.
- Continue to establish sustainability, social and cultural diversity goals and policies for **Downtown London** operations, programs and governance (e.g., accessibility, staff and board recruitment).
- Identify and secure sources of government and community funding and corporate sponsorships to leverage and support LDBA programs and events.
- Establish stronger engagement and information sharing with LDBA Board Chair/ Executive Director and City Council.
- Explore alternative models to address downtown real estate redevelopment including site acquisition, development and disposal for certain uses, including residential uses; the provision and management of general parking facilities; and the provision of culture and heritage systems

9 Next Steps

The development of the **Downtown London** Strategy at this time is an opportunity to reimagine the organization following a period of great upheaval and change for the organization, its members and all of its strategic partners.

Upon approval of the strategy, the Mellor Murray team will complete the operations and marketing implementation plan which will outline the recommended priorities, timeline, partners and estimated budgets along with metrics and performance measures.

Figure 10: Downtown London Strategic Planning Process

As the completion of Phase 3, the Mellor Murray team will prepare an Executive Summary document for public distribution with the following steps:

- Prepare a short and consolidated **Downtown London** Strategy that effectively communicates the vision and pathways to implementing the strategy.
- Prepare a maximum of two initial creative concepts for **Downtown London's** review.
- Upon approval of the creative concept, prepare a draft publication with up to three sets of client revisions.
- Begin production of a high-quality publication formatted in full colour with high resolution images photos provided by **Downtown London.**
- Upon finalization of the publication, provide **Downtown London** with a print-ready pdf file appropriate for printing or sharing digitally.

10 Appendix

10.1 Sample Itinerary: Date Night in Downtown London

This itinerary combines a number of activities (shopping, dining etc.), showcasing and connecting business members and activities to create a compelling story and experience. Rather than providing a comprehensive list of members in various categories, the itinerary is meant to be representative of the types of shops, restaurants and experiences that a visitor could experience during a date in the district.

Campaign theme: “#MyDateNightDownTownLondon”

Step 1: Co-ordinate with a major event at the Budweiser Gardens and launch the campaign ten to fourteen days before, across social media and via the official https://www.downtownlondon.ca/ website.

Offer a “competition” component with a reward of some sort for the “#BestDowntownLondonDateNightStory”. Create a unique “landing page URL” so that all campaign activities can be tracked and analyzed.

Set out the rules to compete i.e., a minimum of places must be visited to participate and experience, to create the best story experience. They must share photos of the business owner/business store front in situ with them (the experiencer) in the image.

Step 2: Show the options available to the “**Downtown London** Date Night Experience” (that could be possible with the co-operation of the **Downtown London** members and strategic partners. The stores, cafés, “pop-up” theatre or art installations, the restaurants, the library, the Covent Garden, cultural & heritage offerings and nature options available via social media and the official https://www.downtownlondon.ca/ website.

Step 3: Encourage the experiencer and their date to share their downtown experience

“met my date at XX café…. we went for a stroll on Downtown London’s King Street to look at the unique vintage stores… but decided to get …“love you forever tattoo’s” … before we celebrated at XX restaurant pre-game at Budweiser Gardens. After the game we… went to XX bar for an awesome martini… then we stopped off at XX café for a late-night latte, before we took XX cab home. “WE LOVE **Downtown London**! Proud to call it our home.”

DOWNTOWN LONDON STRATEGY

Environmental Scan Summary Report

July 2021

DOWNTOWN LONDON RE-IMAGINED

Downtown London Strategy

London Downtown Business Association, April 2021

Consulting Team

Aileen Murray, Ec.D. (F), Mellor Murray Consulting

David Campbell, MBA, Jupia Consultants Inc.

Kevin Curtis, PhD, MCIP, RPP, Curtis Planning Inc.

Tracy John, Amplify Communications

Advisory Committee

Barbara Maly, Executive Director, Downtown London, Project Lead

Andrew McClenaghan, London Downtown Business Association Board Chair

Don McCallum, Main Street London Board Chair

Jim Bujouves, Farhi Holdings Corporation

Steve Cordes, Youth Opportunities Unlimited

Allan Drewlo, Drewlo Holdings

Cheryl Finn, Tourism London

John Fleming, Western University

Christina Fox, Tech Alliance of Southwestern Ontario

Michelle Giroux, Fanshawe College

Graham Henderson, London Chamber of Commerce

Andrea Hibbert, London Arts Council

Kapil Lakhotia, London Economic Development Corporation

Steve Pellarin, London Small Business Centre

Kelly Scherr, City of London

D/Chief Trish McIntyre - London Police Services

Environmental Scan Summary Report

1 Introduction

Downtown London, incorporating the London Downtown Business Association (LDBA) and MainStreet London (MSL), commissioned the development of a Strategy and Implementation Plan. This strategy is intended to build upon the previous efforts of Downtown London and plan for recovery and rebuilding from the impacts of the COVID-19 pandemic.

The project is divided into three phases: research and analysis, community engagement and strategy development.

Figure 1: Downtown London Strategic Planning Process

This Environmental Scan Summary Report is the first step in the strategic planning process that will culminate with the Strategy and Implementation Plan. Several reports will be developed during the process as outlined below:

Downtown London Strategy and Implementation Plan Reports

- Environmental Scan Summary Report (this report)
- Community Engagement and Strategic Priorities Report
- Strategic Plan
- Operations Plan, Marketing & Communications Plan
- Implementation Plan & Performance Measures
- Executive Summary

This Environmental Scan Summary Report includes an introduction to the philosophy and legislation guiding Business Improvement Areas (BIAs) in Ontario. It includes a summary of the related strategies and policies that predate and provide direction for this strategy. The report provides an analysis of the LDBA members and levies. It includes an introduction to the market and demographic analysis with more detailed analysis to come in subsequent documents. A review of the City's Community Improvement Plans (CIP) and MSL incentives is also included.

The COVID-19 pandemic has disrupted the regular schedule of activities and events that would typically be held in Downtown London. This report includes a review of the events that are tentatively planned in this unusual and unprecedented time. The document provides a review of best practices employed by BIAs to address investment attraction, marketing, parking, crime, governance, and resident attraction. This report concludes with a review of metrics, data sources and measures that can help Downtown London to track trends and demonstrate the contributions London's downtown makes to the people, businesses, government, and overall quality of life for the people of London.

2 An Introduction to Business Improvement Areas

The Province of Ontario Business Improvement Area Handbook (2010) Handbook defines a Business Improvement Area (BIA) as,

> **"**…a "made-in-Ontario" innovation that allows local businesspeople and commercial property owners and tenants to join together and, with the support of the municipality, to organize, finance, and carry out physical improvements and promote economic development in their district. Traditionally, a BIA is a body established by a municipality using the specific business improvement area provisions in the *Municipal Act, 2001*. It is governed by a board of management."

BIA membership and funding is described as,

> "Once a traditional BIA is approved by municipal council, businesses within its boundaries become members and pay the BIA levy along with their property taxes. A traditional BIA view is that this structure reflects the principle that all who benefit should be required to bear their fair share of the cost of the program. In addition, the arrangement provides a secure source of funding for BIA activities. In addition, many BIAs undertake modest or extensive public and private fundraising to raise funds for special events or activities."

The main functions of a BIA are to:

1. Oversee the improvement, beautification and maintenance of municipally owned land, buildings, and structures in the area beyond that provided at the expense of the municipality generally; and,
2. Promote the area as a business or shopping area." [1]

Expanding on the provincial definition, typical BIA activities include streetscape improvement / beautification (e.g. decorative lighting, signage, street furniture, planners/flowers, banners, sidewalk treatments, and seasonal decorations), revitalization and maintenance (e.g. sidewalk cleaning, graffiti removal, facade improvement, and safety), marketing and promotion, special events, business recruitment, and communications (e.g. advocacy on behalf of BIA members, liaising with partner organizations such as municipal councils, social agencies, chambers of commerce and tourism agencies.

The Ontario Business Improvement Association (OBIAA) states that

> A BIA is integral to advancing a distinct, livable, vibrant and resilient business district within their local community.

[1] Municipal Act, 2001 - Business Improvement Areas. https://www.ontario.ca/document/business-improvement-area-handbook/appendix-d-legislation#section-0

How do they achieve this?

- Advocate for the local business economy,
- Attract and retain business,
- Create a sense of place and a vibrant public realm,
- Build inclusive programs and infrastructure,
- Reflect an inclusive and diverse community,
- Reflect and develop local culture and build heritage,
- Create a tourist destination,
- Source funding for local area improvements,
- Foster strong public-private partnerships, and
- Direct investment to revitalization efforts.[2]

There are more than 300 BIAs with over 55,000-member businesses in Ontario. Each BIA is unique; reflecting the community and members that it serves. BIA membership includes property owners and their tenants in the established geographic area. Members of the BIA can attend BIA meetings and are eligible to vote on the Board of Directors and other BIA matters. Some BIAs have associate members, typically consisting of businesses nearby but not in the BIA boundaries.

BIAs provide a variety of benefits specific to the various stakeholders as outlined in the following table.

Table 1: Benefits of BIAs

Business Operators	Improved atmosphere and environment. Capital improvements and activities assist in retaining more local customers and attracting more visitors. Cost savings via integration of capital funding and promotions.
Property Owners	Creating a vibrant economic environment leading to increased demand for retail and office space. Decreased vacancy rates and increased property values.
Surrounding Neighbourhood	Physical improvements, enhanced ambience. Increased local shopping choice. Increased employment. Clean up and safety programs. Community events.
Broader Community	Encouraging for tourism and investment in wider community. Increased local shopping choices. Increased business activity resulting in greater tax base. Community engagement and pride beyond the BIA boundaries.

[2] Return on Investment of BIAs, Background Research Report, OBIA, October 2016.

3 Literature Review

A review of previous strategies, City policies and by-laws ensures that the Downtown London Strategy addresses and leverages established programs and policies. The consulting team completed a review of related strategic plans, policies, reports, and other documents. The relevant documents are summarized in the appendix of this report.

Documents reviewed as part of this process included:

- 2017-2020 Strategic Plan for Downtown London
- 2020 AGM Presentation
- BIA Building Permit Data
- Bring Back Main street 2020
- BRT Bus Rapid Transit plan
- City of London Economic Development Business Plan
- CORE Area Action Plan
- Core Area Action Plan 2019
- Downtown Building Permit Reports
- Downtown Levy Paying Member Directory
- Downtown London Branding Guidelines
- Downtown London Community Improvement Plan
- Downtown London Job Descriptions
- Downtown London Market Assessment 2017
- Downtown London Orientation for Businesses
- Downtown Main Street Grant Status Report
- Downtown occupancy rates
- Housing Strategy
- Kotter's 8-step Process for Leading Change
- LDBA, MSL 2021 Budget
- Live Work Learn Play Report
- London Community Recovery Network
- London Cycling and Transportation Demand Projects
- London Downtown Design Guidelines
- London St. Thomas Real Estate Association Market Reports
- London's Community Economic Road Map 2015
- Open and Closed Business List
- Our Move Forward 2015
- Parking Strategy
- RBC Place London COVID-19 Strategic Directions
- Return on Investment of BIAs, Background Research Report
- State of the Downtown
- The London Plan 2016
- Tourism London Economic Impact Analysis

4 Market Analysis

4.1 Downtown London's Industrial Profile

The following analysis is based on the concentration of industries in the downtown based on the number of firms and employment per sector relative to the Census Metropolitan Area (CMA) overall. Statistics Canada provides data on business establishments (locations) by municipality across Canada. This data includes a breakdown of firms and organizations by the detailed North American Industrial Classification System (NAICS) code. These NAICS codes include 2-digit (highest level), 3-digit, 4-digit and 6-digit. The information is also provided for employment level. The industry classification and employment level taxonomy are listed in Table 2 below.

Table 2: Industry Classification and Employment Level Taxonomy

North American Industrial Classification System (NAICS) codes		Employment Level Data
NAICS:	**Description:**	Without employees (non-employers but must have at least $30,000 annual revenues) Total, with employees • 1-4 employees • 5-9 employees • 10-19 employees • 20-49 employees • 50-99 employees • 100-199 employees • 200-499 employees • 500+ employees
62	62 - Health care and social assistance	
621	621 - Ambulatory health care services	
6213	6213 - Offices of other health practitioners	
621340	621340 - Offices of physical, occupational, and speech therapists and audiologists	

Source: Statistics Canada

The business establishment data is based on individual locations, not on business ownership. For example, Starbucks might have seven locations in a municipality. In this example, the database would show seven locations classified in NAICS 722512 - Limited-service eating places.

There are three Census Tracts in the London CMA that conform to the London BIA geographic boundaries: 0022.00, 0033.00 and 0034.00. The combined boundary of the three Census Tracts is slightly larger than the BIA area but still provide an important source of data to assess the business profile in the downtown and the changes between 2015 and 2020. The three Census Tract area is approximately bounded by the Thames River on the west, York Street to the south, Oxford Street to the north and Adelaide Street North to the east.

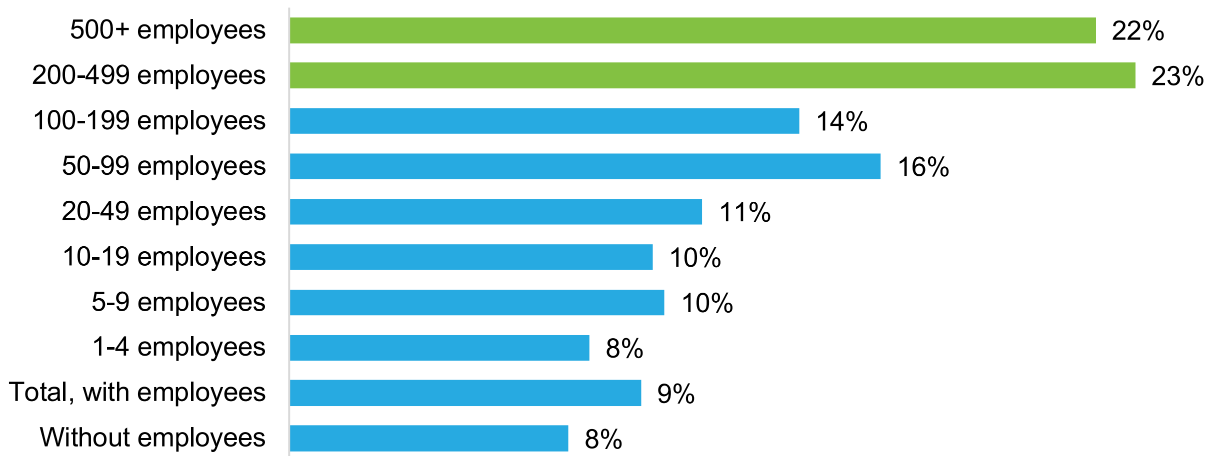
The impact of COVID-19 is not reflected in the 2020 business location counts (the most current source of data) because they are primarily based on 2019 tax filing information. Any long term COVID-19 impacts (e.g. permanent closures) will only start to appear in the June 2021 business location data which will not be published until early fall 2021.

In the LDBA area, as defined by the three Census Tracts, there were 1,485 employer business locations in June 2020 and 2,553 non-employer business locations[3] including all private sector, public sector, and the non-profit sector establishments.

Between June 2015 and 2020, there was a modest decline in the number of employer and non-employer businesses in the downtown but a slight increase in the number with more than 100 employees (and an increase of four with 500 or more employees).

As shown in Figure 2, the employer establishments in the downtown are, on average, much larger than the rest of the London CMA[4]. Over 22% of the largest employers (200 or more) are in the downtown.

Figure 2: Share of London CMA firms/organizations located in the downtown by employment size (% of total)



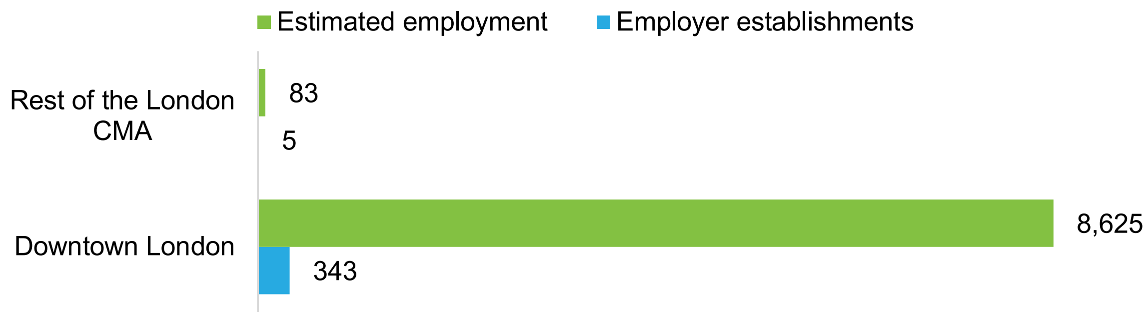
Source: Statistics Canada business location counts, June 2020.

To illustrate the importance of the downtown as the economic heart of the London CMA, Figure 3 shows the number of employer establishments in the downtown per square kilometre compared to the rest of the metropolitan area. There are 64 times as many employer establishments in the downtown per square kilometre compared to the rest of the CMA and 104 times as much employment.

[3] The business count includes those business locations with a minimum of $30,000 in annual sales.

[4] The Cenus Metropolitan Area (CMA) includes the cities of London and St. Thomas, the townships of Adelaide-Metcalfe and Southwold as well as the municipalities of Central Elgin, Middlesex Centre, Strathroy-Caradoc, and Thames Centre. The City of London represents approximately 78% of the CMA population.

Figure 3: Concentration of firms and employment per square kilometre, 2020



Source: Statistics Canada business location counts, June 2020.

Estimating employment in the downtown

The Statistics Canada business location counts data provide employment by range (1-4, 5-9, etc.). In order to estimate total employment by sector, the mid-point figure for each employment range was used and aggregated to estimate total employment. Across the CMA, this approach yields a total employment of 258,000. For comparison, the Statistics Canada employment figure in 2020 for the London CMA from the Labour Force Survey was 257,000. Based on this method, there are an estimated 38,000 people working in Downtown London.

Readers should note these estimates are based on 2020 data, and therefore do not reflect COVID-19 impacts. For example, many of these workers likely worked from home at least for some portion of the year in 2020.

Large employers in the downtown

There are 10 firms / organizations in the downtown with at least 500 employees (22% of the CMA total). These 10 firms include three head offices of large corporations[5] and one firm each in the following sectors:

- Direct individual life, health and medical insurance carriers
- Offices of accountants
- General hospitals
- Sports stadiums and other presenters with facilities
- Fitness and recreational sports centres
- Food service contractors
- Other local, municipal and regional public administration

Professional services cluster

The downtown is home to more than 300 professional services firms with employees and another 282 non-employer businesses. Among the employer firms, 22% of the CMA total are located downtown but this understates the real impact as 57% of employers with 50 or more employees are in the downtown. There are 71 employer establishments in the downtown per square kilometre compared to only 0.4 per square kilometre elsewhere in the CMA.

An estimated 6,300 professional services workers are based in the downtown or 43% of the CMA total. To put this into perspective, there are an estimated 1,440 professional services workers per

[5] The Statistics Canada data does not include firm/organization names.

square kilometre in the downtown compared to only three per square kilometre elsewhere in the CMA.

The CMA's legal services cluster is centred in the downtown. There are 137 employer businesses in the downtown providing legal services or 48% of the total in the CMA. Over 40% of the architectural services firms are in the downtown as are 30% of the specialized design firms.

Table 3 provides a summary of the professional services cluster in the downtown and is share of total firms and employment across the London CMA.

Table 3: Summary of the Downtown London professional services cluster

	Downtown London	% of CMA	Rest of the CMA
Employer establishments	306	22%	
Non-employer establishments	282	9%	
Estimated cluster employment	6,200	43%	
Employer establishments per square kilometre	71		0.4
Est. employment per square kilometre	1,440		3.1
Top sub-sectors by firm concentration			
Legal services	137	48%	
Architectural services	11	42%	
Specialized design services	10	30%	

Source: Statistics Canada business location counts, June 2020.

Information technology cluster

There are 55 IT firms/establishments in the downtown including IT services firms, software and video game developers, data hosting firms and computer training. Overall, 21% of all employer firms are in the downtown. However, this understates the size and impact of the downtown IT cluster. Of the 60 IT firms in the London CMA with at least 10 employees, 43% are located in the downtown. All five of the IT employers with at least 200 employees are in the downtown.

There are approximately 4,500 people employed in the London CMA IT cluster of which more than 2,800 (or 63%) are located in the downtown. To put this into perspective, this means 2,800 workers in the IT sector in a 4.3 square kilometre zone representing only 0.2% of the geographic area of the CMA. In other words, there are 650 IT workers per square kilometre in the downtown and less than one IT worker per square kilometre elsewhere in the CMA.

Table 4: Summary of the Downtown London IT cluster

	Downtown London	% of CMA	Rest of the CMA
Employer establishments	55	21%	
Non-employer establishments	46	9%	
Estimated cluster employment	2,800	63%	
Employer establishments per square kilometre	13		0.1
Est. employment per square kilometre	650		3.1
Top sub-sectors by firm concentration			
IT services	41	18%	
Software publishing and video game development	9	35%	

Source: Statistics Canada business location counts, June 2020.

Finance and insurance services cluster

There are 128 finance and insurance employer establishments in the downtown or 20% of the total. However, among the larger firms, a much higher share of finance and insurance firms are located downtown including 45% of finance and insurance firms with at least 20 employees and 71% of finance and insurance firms with 24 with 50 or more employees. Of the estimated 7,700 people employed in finance and insurance, an estimated 39% are in the downtown. To put this into perspective, there are an estimated 683 finance and insurance workers per square kilometre in Downtown London compared to less than two finance and insurance workers per square kilometre elsewhere in the London CMA.

Much of the specialized financial services activities are located in the downtown. The downtown is home to 40% of the firms involved in securities and commodity contracts intermediation and brokerage, 60% of those in investment banking and securities dealing, and 46% of insurance carriers' operations in the London CMA.

Table 5: Summary of the Downtown London financial services cluster

	Downtown London	% of CMA	Rest of the CMA
Employer establishments	128	20%	
Non-employer establishments	272	12%	
Estimated cluster employment	2,960	39%	
Employer establishments per square kilometre	30		0.2
Est. employment per square kilometre	683		1.8
Top sub-sectors by firm concentration			
Securities and commodity contracts intermediation/brokerage	19	40%	
Investment banking and securities dealing	6	60%	
Insurance carriers	17	46%	

Source: Statistics Canada business location counts, June 2020.

Accommodations cluster

According to Statistics Canada, over one-third of all hotels in the London CMA are in the downtown (34%). Of the 10 biggest hotels by employment, six (60%) are in the downtown. There are 2.3 hotels per square mile in the downtown compared to 0.007 hotels per square mile elsewhere in the CMA. Just over an estimated 40% of all employment in the hotel sector is in the downtown.

Table 6: Summary of the Downtown London accommodations services cluster

	Downtown London	% of CMA	Rest of the CMA
Employer establishments	10	34%	
Estimated cluster employment	700	40%	
Employer establishments per square kilometre	2		0.007
Est. employment per square kilometre	153		0.4

Source: Statistics Canada business location counts, June 2020.

Restaurants cluster

There are 144 full-service and limited-service restaurants located in the downtown or 33 per square kilometre compared to only 0.28 per kilometre elsewhere in the CMA. There are 120 times as many restaurants per square kilometre in the downtown as elsewhere in the CMA. There are an estimated 2,900 people working in the downtown restaurants cluster or 680 per square kilometre compared to only 6.7 restaurant workers per square kilometre elsewhere in the CMA.

In addition to restaurants, 29% of the CMA's drinking places (excluding restaurants) are in the downtown, as are 20% of the CMA's food service contractors.

Table 7: Summary of the Downtown London restaurants cluster

	Downtown London	% of CMA	Rest of the CMA
Employer establishments	144	16%	
Estimated cluster employment	2,940	14%	
Employer establishments per square kilometre	33		0.28
Est. employments per square kilometre	680		6.7

Source: Statistics Canada business location counts, June 2020.

Retail trade

The retail trade industry is spread out across the CMA. Only seven % of the region's retail trade establishments are in the downtown (146 total retail trade stores). Relative to size, there is still a large concentration of retail firms in the downtown. There are 34 retailers per square kilometre in the downtown compared to only 0.7 elsewhere in the CMA.

Among retail sub-sectors, Downtown London is home to 21% of the CMA's men's clothing stores, 14 % of the jewellery stores, 12% of women's clothing store and 11% of shoe stores.

Health care

The health care sector is not as concentrated in the downtown as other sectors but there are still 170 health care and social assistance establishments with employees in the downtown, or eight percent of the total across the CMA. Over 17% of health care establishments with 20 or more employees are located downtown. Eleven percent of dentists are in the downtown but only five percent of doctors' offices.

The downtown is home to a cluster of specialized health care services providers including 12 employers in the vocational rehabilitation services sector (46% of the CMA total) and four in NAICS 623992: homes for emotionally disturbed children (40% of the CMA total).

Tourism and culture infrastructure

In addition to the high concentration of hotels and restaurants in the downtown, the area is home to one-third of the CMA's museums (four employer establishments), 30% of the CMA's performing arts companies with employees (10 in total) and most of the region's performance venues, theatres and sports stadiums.

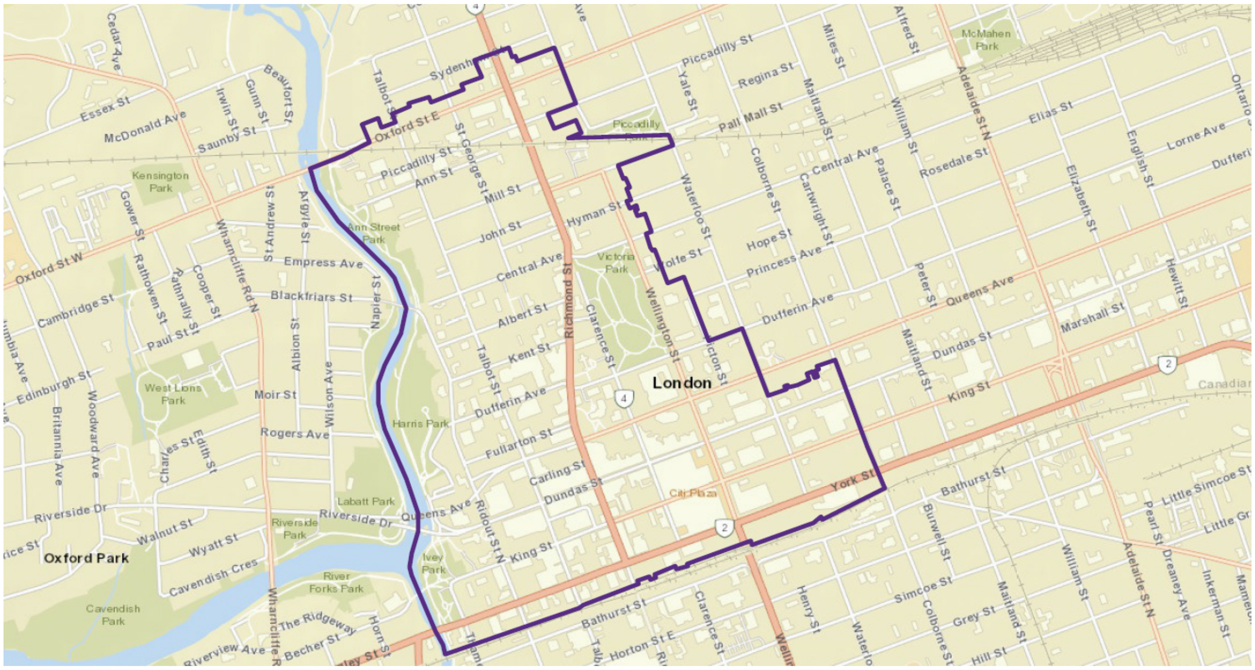
4.2 Downtown London's Residents

Attracting population to live downtown has been a key component of downtown renewal strategies across North America. A broad mix of office and commercial activity, shopping, services and residential population makes for a stronger and more durable downtown over the long term.

The Downtown London BIA area is bounded by the Thames River to the west, Oxford Street East to the north, Bathurst Street to the south and roughly by Wellington Street to the east. The exact boundaries are shown in Figure 4.

In this geographic zone, in 2021, there are an estimated 7,900 residents and 5,300 households[6]. The 7,900 residents represent approximately 1.5% of the London CMA population. The 5,300 households represent 2.4% of total households in the London CMA.

Figure 4: Downtown London BIA boundaries



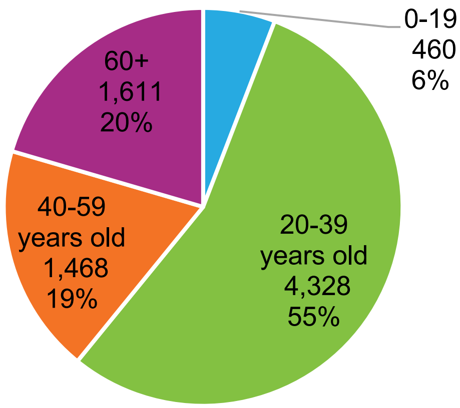
Source: City of London.

Population by age group

As shown in Figure 5, the population living in the downtown is heavily skewed towards the 20 to 39 age group. There are an esitmated 4,330 aged 20-39 living in the downtown, or 55% of the total. The population under the age of 20 is only six percent of the total and the number over the age of 60 represent 20% of the total.

[6] The source of most statistics in this section is Environics Analytics. The firm provides intercensal estimates for population and household dynamics.

Figure 5: Downtown BIA population by age group, number and % of total



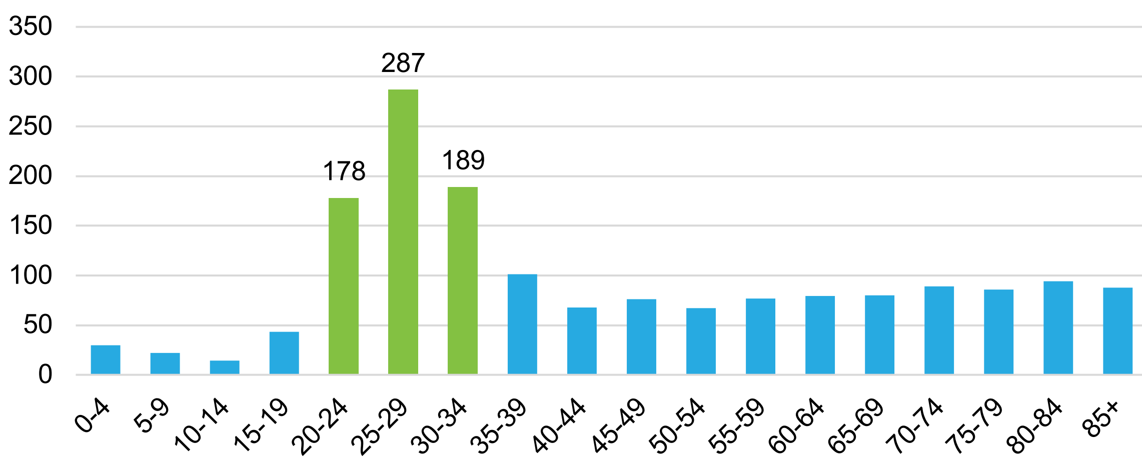
Source: City of London/Environics Analytics.

Figure 6 compares the population distribution by age group in the downtown BIA area to the London CMA overall. It shows the population as an index with the London CMA population distribution set at 100.

The population aged 20-24 living in the downtown has an index of 178 meaning there are 78% more people living in the downtown in this age group, as a share of total population, compared to the CMA overall. Among the population aged 25-29 the spread is even wider as the index is 287, meaning there are nearly three times as many people in this age group living in the BIA relative to population size. For those aged 30-34, the index is 189.

By constrast, there are relatively few children living in the downtown. For example, there are 78% fewer aged 10 to 14 in the downtown relative to the CMA overall.

Figure 6: Downtown BIA population by age group, Index (London CMA = 100)



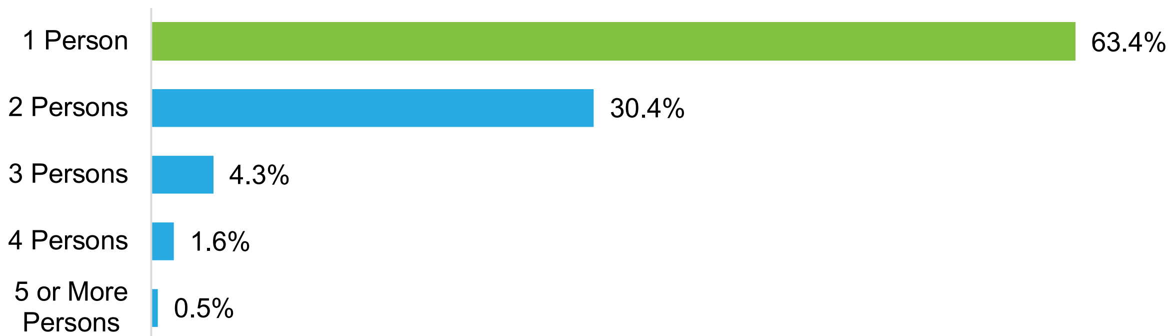
Source: City of London/Environics Analytics.

Household size

A large share of the BIA population lives in one person households. As shown in Figure 7, over 63% of the population lives in a one-person household. This is more than twice as many compared to the CMA overall. Another just over 30% live in two person households which is slightly below the CMA overall (Index = 87). The share living in three person households is 71% below the CMA and the share living in four person households is 88% below.

This marital status profile of the BIA population is similar to the household profile. More than 50% are single and have never been married (80% more compared to the CMA overall) and 32% who are married/common law (42% below the CMA). Nine percent are currently divorced and not remarried, 32% above the average across the CMA.

Figure 7: Downtown BIA population by household size, % of total



Source: City of London/Environics Analytics.

Only just over seven percent of households in the downtown have children living at home compared to nearly 39% across the CMA (Figure 8). There are 81% fewer households with children in the downtown compared to the CMA. This is the most pronounced feature of the downtown population.

Figure 8: Share of the Downtown BIA population with children at home, % of total households

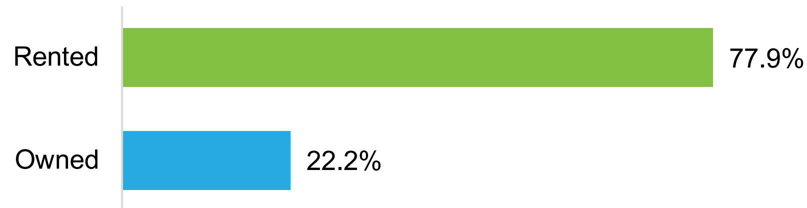
Source: City of London/Environics Analytics.

Household ownership and type

Most people living in the BIA rent their accommodations. Environics estimates that 78% rent compared to just 22% who own their own dwelling. By comparison, 36% of people across the

London CMA are renters and 64% own their own dwelling. The London CMA in general has an above average share of dwellings that are rented compared to other urban centres[7].

Figure 9: Downtown BIA population by housing tenure, % of total

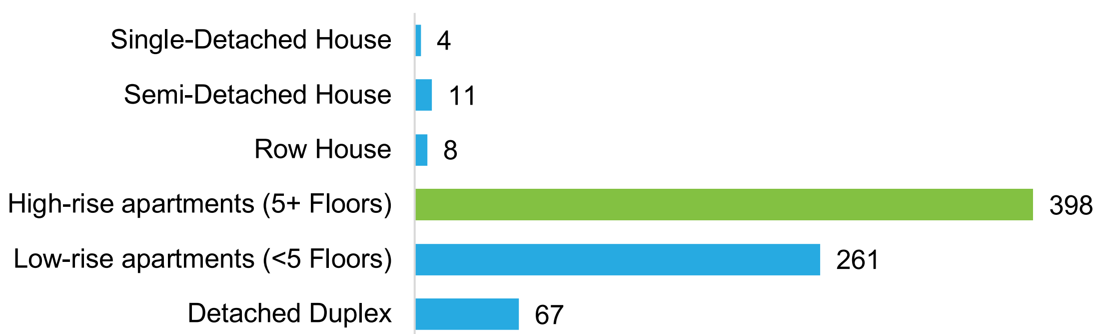


Source: City of London/Environics Analytics.

The vast majority of downtown BIA residents live in apartments. According to Environics estimates, 96 % of the population in 2021 live in an apartment compared to less than 30 % across the CMA. Figure 10 shows how the mix of downtown housing compares to the London CMA as an index with the CMA set at 100.

There are nearly four times as many living in high rise apartments and 2.6 times as many living in low-rise apartments compared to the CMA overall. There are 33% fewer living in detached duplexes and 89% fewer living in semi-detached houses. According to Environics, there are only 130 single detached houses in the downtown BIA geographic area.

Figure 10: Downtown BIA population by housing type, Index (London CMA = 100)



Source: City of London/Environics Analytics.

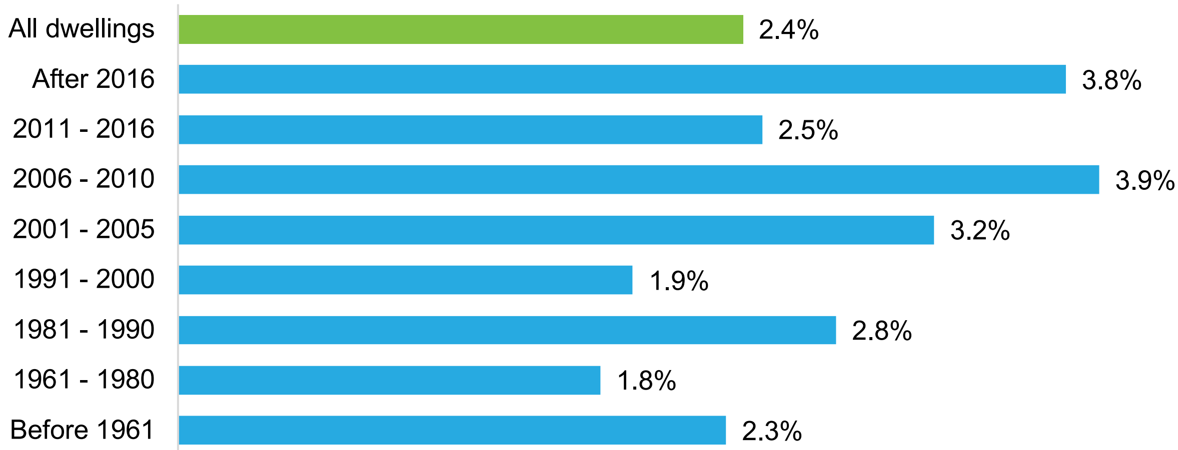
According to Environics, 2.4% of all London CMA residential dwellings are located in the Downtown BIA area. Since 2001, a larger share of the CMA total has been constructed in the downtown. Figure 11 shows the share of total dwellings constructed in the downtown by timeframe.

Between 2017-2020 (after 2016) there have been 287 dwellings constructed in the downtown or 3.8% of the total across the CMA. Another robust period of residential construction was the 2006-2010 period when 560 units were built or 3.9% of the CMA total. Overall, 29% of the total residential

[77] The Toronto, Hamilton, Kitchener and Windsor CMAs all have a lower rental share compared to London.

dwellings in the BIA were built since 2000 compared to 21% of all residential dwellings across the CMA.

Figure 11: Percentage of total London CMA dwellings constructed in the Downtown BIA by period

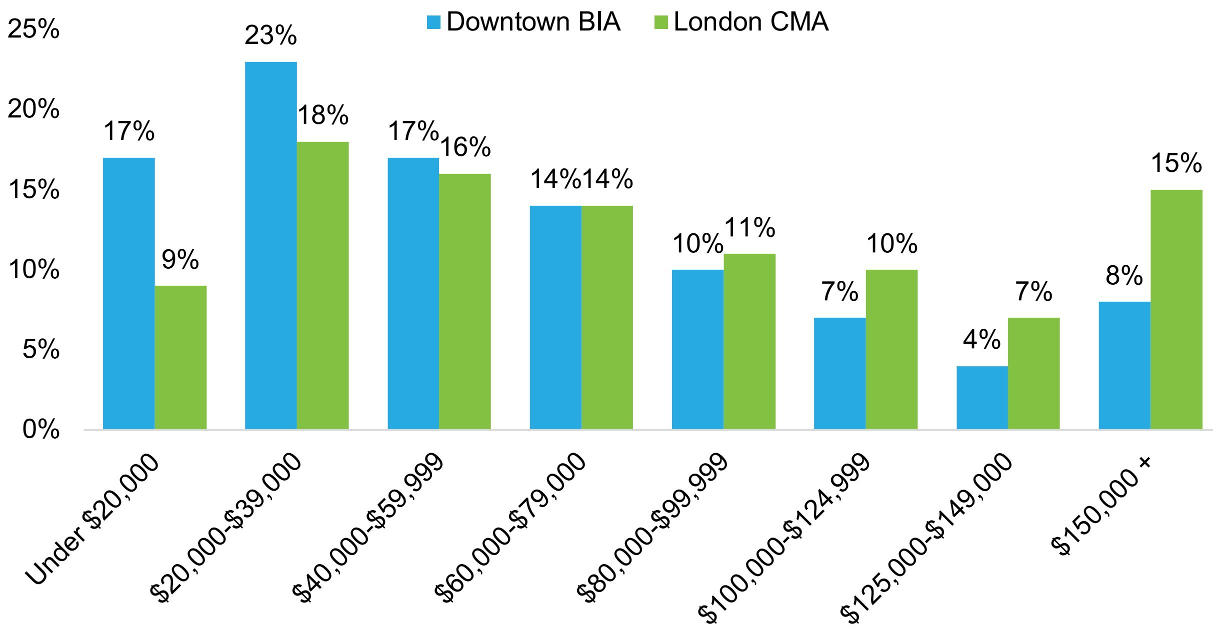


Source: City of London/Environics Analytics.

Household and personal income

Environics provides household income estimates for 2021 broken down by income cohort. The breakdown for the BIA area and the London CMA is shown in Figure 12. The BIA population has considerably more households at lower income levels (under $20,000 and $20,000-$39,000) compared to the CMA population overall and fewer at the higher end (over $100,000/year). Overall, Environics estimates that average household income in the downtown BIA is 23% lower than for the London CMA overall.

Figure 12: Household income by level, Downtown BIA area and London CMA, % of total



Source: City of London/Environics Analytics.

However, in this case, it is important to dig deeper into the definitions. Average household income may not be the best measure for comparison as the average household across the CMA is 61% larger than in the downtown (i.e. there is an average of 1.5 persons per household in the downtown and 2.4 per household in the CMA overall).

Personal income statistics may be a better measure because of this significant difference in household size. Using 2016 Census data for a similar geographic region, average employment income in the downtown is actually slightly higher than the average across the CMA and the number of individuals reporting income of $100,000 or more is also slightly higher in the downtown (6.9% of the total compared to 6.7% across the CMA).

However, there is a higher share of residents in the downtown living below the low income cut-off. As of the 2016 Census, 25% of downtown residents earned below the low-income cut-off compared to 19% across the CMA.

Housing costs

As discussed above, the vast majority of residents in the downtown are renting their dwellings. As of the 2016 Census, two out of every five households were spending at least 30% of total income on shelter costs. This was well above the CMA average of 27% of households.

Figure 13: Share of households spending more than 30% of income on shelter costs

Source: Statistics Canada 2016 Census.

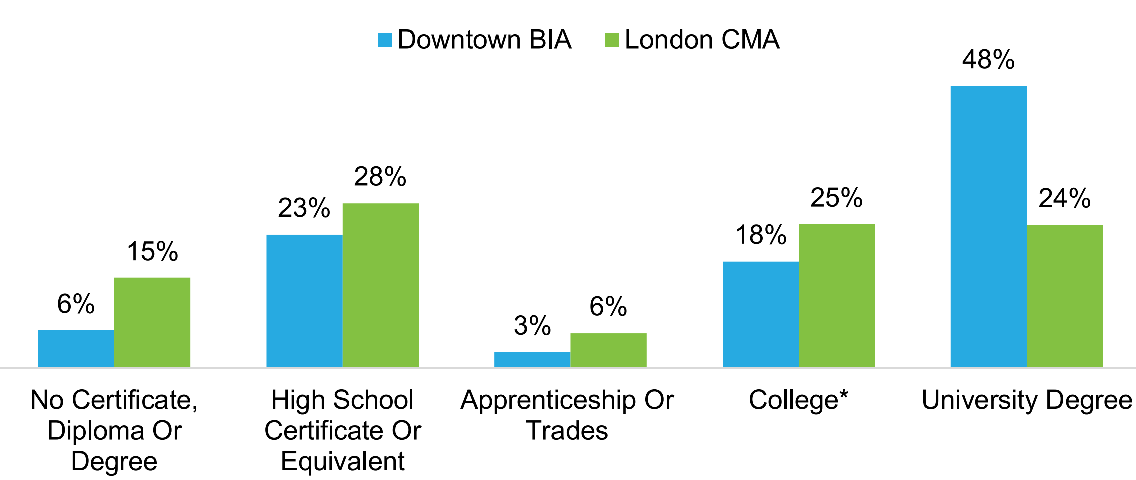
According to CMHC, between 2016 and 2020 average apartment rent in the London CMA increased by 25%, well above average household income growth over the period. While CMHC does not publish data specifically for the downtown, given the types of development in the intervening years it is likely average rents have increased significantly.

Educational profile of downtown BIA residents

Nearly half (48%) of the adult population living in the downtown BIA has a university degree compared to just 24% across the CMA. There is also a much lower share with no formal education (i.e. not completed high school). Figure 14 shows the breakdown of the adult population by education level for the Downtown BIA and the London CMA.

The share with an advanced university degree (Master's, etc.) in the downtown is 20.4% compared to only 8.5% across the CMA.

Figure 14: Share of the population by education level



Source: City of London/Environics Analytics.

The workforce living in the downtown BIA

Environics estimates there are 5,165 downtown BIA residents who are active in the workforce. The workforce participation rate (i.e. the share of the adult population working or looking for work) is 69.9 %, nearly eleven percentage points higher than the participation rate across the CMA (58.7%). It is important to note this data covers only those living downtown. The estimated number working in the downtown is developed later in this report.

The top three occupational groups by the number of employed are: sales and service; education/government/religion/social; business/finance/administration and health care. Table 8 shows the number of workers by broad occupational group for the downtown. The table also compares the breakdown of the workforce living in the downtown to the London CMA overall. As a share of the total, the downtown BIA area has 2.5 times as many employed in arts, culture and recreation; 2.3 time as many in sciences occupations, and 60% more in health occupations.

The workforce living downtown is much less reliant on car transportation to get to and from work. Nearly 36% either walk or bike to work compared to only seven % across the CMA. Nineteen percent use public transit compared to only eight percent across the CMA. Forty-four % of downtown residents use their car to get to work compared to 84% across the CMA.

Table 8: Downtown BIA workforce by occupational group, number and Index (London CMA = 100)

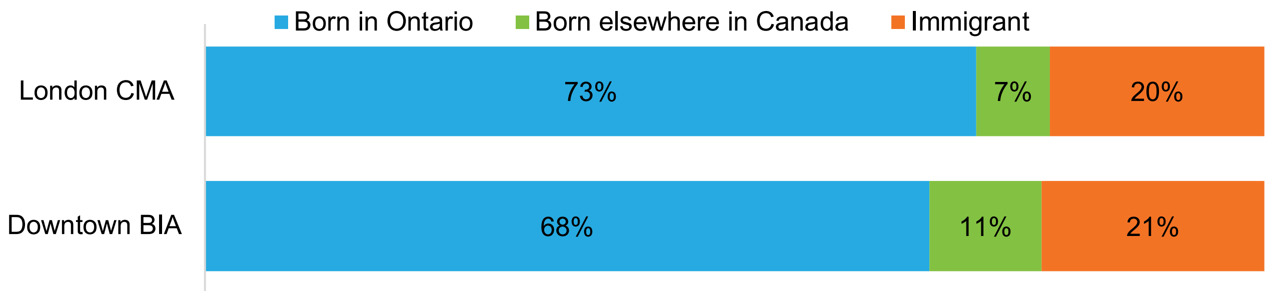
Occupational group:	Downtown BIA	London CMA = 100
Management	495	122
Business Finance Administration	716	121
Sciences	577	225
Health	618	160
Education, Gov't, Religion, Social	728	127
Art, Culture, Recreation, Sport	304	248
Sales and Service	1,237	123
Trades and Transport	255	44
Natural Resources and Agriculture	19	25
Manufacturing and Utilities	99	37

Source: City of London/Environics Analytics.

Immigration/Migration/Diversity

The majority of the population living in the downtown was born in Ontario (68%). Another 11% were born elsewhere in Canada and 21% were born outside of Canada. Immigrants account for a slightly higher share of the downtown population compared to the CMA overall. Nearly one in four residents in the downtown is a visible minority (23%) compared to 19% across the CMA. The top visible minority groups in order are: South Asian, Chinese, Arab, Korean and Black.

Figure 15: Downtown BIA population by place of birth, % of total

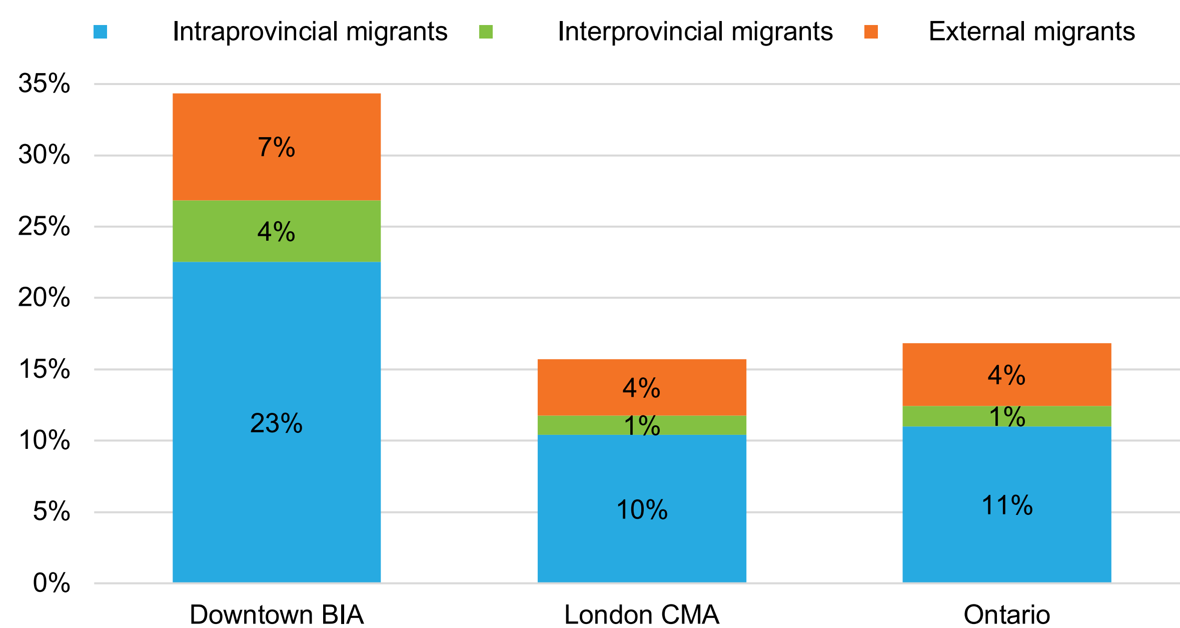


Source: City of London/Environics Analytics.

The BIA has a demonstrated ability to attract population. In the 2016 Census, nearly 35% of the population aged five and older living in the BIA had not lived there five years previous (in 2011). This compared to only 15% of the population living in the London CMA overall and 16% in the province overall. For the London CMA and the province, the figures represent the share who did not live in the same municipality five years previous.

This high rate of inward migration also means there was significant outward migration from the downtown BIA. The overall population in the downtown likely increased by less than 10% between 2011 and 2016 but 35% of the population aged five and older were new to the downtown BIA area[8].

Figure 16: Share of the population 5+ in 2016 who did not live in the BIA in 2011



[8] Statistics Canada does not publish population change between Census periods for dissemination areas. The "less than 10 percent growth" estimate is based on dwelling construction and other data.

Source: Statistics Canada 2016 Census.

Daytime population in the downtown BIA

In the daytime, the population in the downtown BIA area swells to 35,200, 4.6 times larger than the permanent population. Seventy-eight percent of those working downtown come to the same place of work each day while another 13% work 'mobile'.

4.3 Behavioural profile of the downtown BIA population

Using survey data and other sources, Environics provides a behavioural profile of the downtown BIA population (among those aged 14+).

Behaviour:	Profile:
Media consumption	The downtown BIA population spends considerably more time online but less time listening to the radio or reading newspapers/magazines compared to the London CMA overall. They are 3.5 times more likely to use public transit and consume outdoor advertising.
Activities	The downtown BIA population attends museums more than the CMA population overall but is slightly less likely to attend nightclubs/bars.
Sports	Residents of the downtown are more likely to follow professional baseball than ice hockey. The top played team sport is ice hockey (10.9%) followed by soccer (10.2%), volleyball (10.1%) and basketball (9.5%). In all cases, downtown residents play team sports at a much higher rate than the CMA population overall. The top recreation sports are fishing (19%), tennis (9.2%), in-line skating (6.2%) and snowmobiling (5.6%). In all cases, again, the downtown population has a much higher participation rate than the CMA population overall.
Leisure and fitness activities	Nearly 36% of the downtown BIA population is involved in photography as a leisure activity (well above the CMA population). They also play billiards a lot more (20.5% of residents), sewing/knitting (25% of residents) and camping (25% of residents). Downtown residents are more likely to exercise at home compared to the CMA population (39.4% of residents), 37.4% are regular swimmers, 19.5% are regular joggers and 17.3% are regularly involved in aerobics. In all cases this is well above the CMA level.
Grocery shopping	Residents of the downtown are far more likely to shop at a grocery store at least three times per week (43 % more). Almost all groceries are purchased from grocery stores. Only one % from department stores. The downtown population rarely uses coupons.
Cooking	The downtown population in general does not like to cook as much as the CMA population.
Environmental activities	The downtown population is more likely to pay for environmentally friendly products, make a conscious effort to recycle, buy products in bulk to avoid over-packaging, give preference to 'green' products. The downtown population is far more concerned about the quality of drinking water (70.3% of residents).

Motivation	Over 30% of residents want to "get to the very top of my career" – modestly more than the CMA population overall. They are less interested in working in teams. Just over 17% are "willing to sacrifice time with family to get ahead", considerably more than the CMA population overall.

4.4 Downtown BIA Households: PRIZM Profile

Environics assigns households into over 60 different segments that paint a broad picture of the population. In the downtown BIA area, only five different segments accounted for over 97% of the population. These segments, in order are:

PRIZM Segment:	Description:
Grads & Pads (61% of households)	The youngest lifestyle type in Canada, Grads & Pads is a collection of young city dwellers living near universities. Present since 2004, segment members have become slightly younger, less affluent and more likely to be living in low-rise apartments than in the past. But it is still a progressive mix of well-educated singles and couples, students and recent grads, white-collar professionals and service workers—all living in apartments within a short commute to work by public transit or foot. Their incomes are not high, but these young adults just entering the workforce enjoy the freedom of spending their first pay cheques solely on themselves. With two-thirds of the adults unattached, Grads & Pads residents are night owls who frequent bars, nightclubs and art galleries. They stay active by jogging, mountain biking, playing squash and working out at health clubs. They are also the kind of young consumers who, to balance their alcohol-fueled partying, are health-conscious foodies who prefer organic veggies and patronize grocery stores that offer sustainably sourced products.
Silver Linings (18% of households)	Located in big cities across Canada, Silver Linings consists of older and mature singles, widows and divorced individuals living in high-rise apartments—increasingly, the dwelling of choice among city residents. More than half of residents are over 55 years old; some 55% are unattached. Although nearly 40% of adults have attended a university, the segment's members have below-average incomes, in part because so many are retired. Those still working have jobs in administrative support, professional, scientific and technical services. But what they lack in income, Silver Linings members make up for in leisure-rich lifestyles. They have high rates for going to casinos, food and wine festivals, and ballet, opera and symphony performances. For exercise, they enjoy participating in activities like tennis, ice hockey and bowling. And they like to travel, particularly to the United Kingdom, Africa and the northern territories in Canada.
Sunset Towers (8% of households)	With nearly half of its maintainers over 65 years old, Sunset Towers is one of Canada's oldest lifestyles—as well as one of the least affluent. These low-income retirees tend to live in older, seniors-oriented low- and high-rise apartment buildings in cities across Canada. More than two-thirds its members are retired, typically getting by on modest pensions. Because most never made it beyond high school and spent their working lives at low-paying service sector jobs, their

PRIZM Segment:	Description:
	lifestyles today are unpretentious. Residents like to spend their time quietly, sewing, birdwatching and reading. But they also like to escape the routine of their apartments to go to racetracks and casinos. Many support the arts, regularly patronizing community theatres and the opera. But in this low-key, slow-paced world, residents show a preference for simply entertaining at home.
Urban Digerati (6% of households)	The most urban of all the segments, Urban Digerati is a collection of younger, tech-savvy singles concentrated in the downtown apartment buildings of two cities: Toronto and Montreal. Reflecting two emerging demographic trends—the increasing urbanization of Canada and the growth of high-rise neighbourhoods—Urban Digerati offers residents a vibrant vertical world, with bedrooms in the clouds and a lively social scene on the ground. Upper-middle-income, highly educated and culturally diverse, Urban Digerati neighbourhoods are typically filled with recently built high-rise apartments and condos located near fitness clubs, clothing boutiques and all types of bars—from wine to coffee to microbrew. Because many residents have yet to start families, they have the time and discretionary income to pursue active social lives, going dancing and barhopping, and hitting film festivals and food and wine shows. And they like to look good while on the social scene, taking aerobics and Pilates classes and purchasing the latest fashions and electronics online. But they are not simply acquisitive materialists; many are globally conscious consumers who support the arts and are actively involved in their communities.
Striving Startups (3% of households)	Situated in once-thriving downtown districts, the duplexes and low-rise apartments of Striving Startups no longer anchor new and expanding neighbourhoods. Yet these urban communities attract a mix of predominantly young singles and single-parent families for their affordable rentals near in-town amenities. Despite modest incomes from jobs in sales and services, these households have active social lives, with high rates for going to bars and nightclubs, music festivals and community theatres. Many like to exercise at a health club, swimming, doing Pilates and taking fitness classes. These younger consumers like to shop—whether to pick up low-priced, trendy apparel from Fairweather or bargains at second-hand clothing stores. Describing themselves as discriminating consumers, they follow the latest trends at craft, boat, and health and living shows. And many have aspirations to improve their lot, with a disproportionate number going to career colleges, community colleges and universities.

4.5 Strategic Considerations: London's Downtown Population

Issue:	Strategic considerations:
The lack of families in the downtown	There are very few children living in the downtown (e.g. 78% fewer residents aged 10-14 compared to the CMA). Many downtowns across North America have made considerable strides retaining young people downtown after they decide to have children. Montreal, as one example, has built schools, parks and other amenities to retain young families in the downtown.
The growth in housing stock in the downtown	According to Environics, housing unit construction has been 60% faster in the BIA area between 2017 and 2020 than the CMA overall. Building permit data shows a similar trend. This is good news although it is important to ensure a mix of housing to ensure a diverse population in the downtown.
Diversity in the downtown	There modestly higher share of immigrants in the downtown and a more visibly diverse population. This is a feature that should be promoted. A larger share of London's population growth in the future will come from immigrants and attracting them to the downtown should be a priority.
The high level of population churn in the downtown (moving in and out)	The fact that nearly 35% of the population five and older in the downtown in 2016 did not live there five years earlier is an indication of significant church (people moving in and out). Ideally the downtown would be attractive to more than just young 'Grads & Pads' or older 'Silver Linings' and 'Sunset Towers' to use the Environics PRIZM segments.
The high share of renters vs. owners	This could be a driver of the high level of population churn. Even though a very large share of the population lives in apartments having more of them owning their dwellings rather than renting could reduce the level of outward migration.
The highly educated population	The highly educated population in the downtown is an important selling feature when marketing the area as a place to live.
The relatively high cost of housing	The downtown should strive to have a mix of housing options to support a diverse population.
Above average poverty rates	At least at the time of the 2016 Census, the share of the population below the low-income cutoff was above the CMA average but not by a wide margin. Still, 25% below the poverty line is a significant concern.
The swelling daytime population	According to Environics, the daytime population in the BIA area swells by 4.6 times compared to the permanent population. This is an important reminder of the strategic importance of the downtown as an economic engine.
The behaviour profile of downtown residents	In general, downtown residents are more educated, more environmentally friendly, more involved in sports and exercise and more motivated to succeed in their careers. This profile of the population should be part of the marketing to potential residents.

DOWNTOWN LONDON RE-IMAGINED

4.6 Downtown Population Growth Forecasts

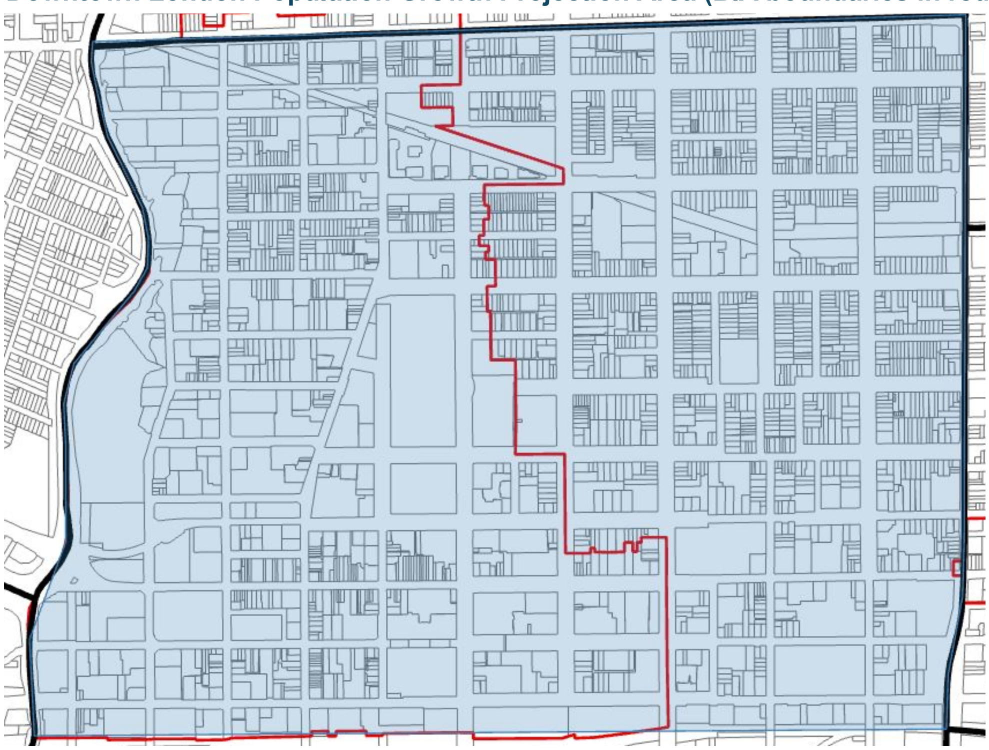
The City of London does not have a population growth forecast specifically for the downtown BIA boundaries, but it does have growth projections for a larger area as shown in Figure 17. In this larger downtown, the city is forecasting strong population growth of over 2.3% per year between 2019 and 2029, tapering only slightly to 1.8% per year from 2029 to 2039.

Table 9: Downtown London population growth projections through 2039

Year:	Population	Growth by period	Cumulative growth
2016 (Census):	13,386		
2019	14,209	+6%	+6%
2024	15,852	+12%	+18%
2029	17,538	+11%	+31%
2034	19,046	+9%	+42%
2039	20,710	+9%	+55%

Source: City of London

Figure 17: Downtown London Population Growth Projection Area (BIA boundaries in red)



Source: City of London.

4.7 Implied market size for goods and services: Downtown BIA residents

The total annual income of downtown residents in 2021 is estimated to be $376 million ($47,800 per capita). Using average household expenditure data from Statistics Canada for Ontario, an implied market size for various goods and services can be derived. While the total market size in the downtown represents only a small fraction of the city or CMA overall, it is tightly concentrated with nearly three times the population density compared to the rest of the city.

As shown in Table 10, downtown residents will spend an estimated $277 million on current goods and services in 2021 (the rest of income goes to taxes and savings). Of this food is a top spending category with over $29 million spent on food purchased from stores and $11 million on food purchased from restaurants. Shelter costs is the top spending category accounting for an estimated $86 million in spending in 2021. Of this, $44.5 million will go towards rent and mortgage payments and another $10 million+ on water, fuel and electricity. Communications providers generate an estimated $10.8 million from downtown London BIA residents and suppliers of household furnishings and equipment another $10.7 million.

Transportation is another top spending category. The purchase/leasing of vehicles, insurance, operations and maintenance; along with other costs such as public transportation accounts for 18% of current consumption. Downtown residents spend another $17.6 million on recreation and nearly $15 million on health and personal care.

Table 10: Implied market size for selected goods and services, downtown BIA residents

Total household income	$376,000,000
Total current consumption	$277,330,000
Food expenditures	$40,197,000
Food purchased from stores	$29,336,000
Food purchased from restaurants	$10,865,000
Shelter	$86,291,000
Mortgage/rent payments	$44,500,000
Water, fuel and electricity for principal accommodation	$10,418,000
Communications (telephone, Internet, etc.)	$10,754,000
Household furnishings and equipment	$10,661,000
Clothing and accessories	$13,705,000
Health and personal care	$14,951,000
Transportation (vehicle operation/maintenance, public transportation, etc.)	$49,496,000
Recreation	$17,595,000
Personal insurance payments and pension contributions	$20,627,000
Pet food and services	$3,133,000
Gifts of money, support payments and charitable contributions	$8,689,000

Source: Derived using Environics and Statistics Canada data.

Because the downtown is a focal point for commerce and services for the city, its merchants provide a full range of goods and services for downtown residents. There are 146 different retail shops in the downtown or 10 per 1,000 population. This compares to less than four retail shops per 1,000 population in the city overall[9].

There are 36 personal care firms (beauty salons, barber shops, etc.) in the downtown, nearly five times more than the city overall adjusted for population size. There are 144 restaurants in the downtown, over six times more than the rest of the city, adjusted for size. There are 13 bank branch operations, five times more than the rest of the city, on a per 1,000 population basis.

Table 11 shows the number of establishments in selected local services sectors compared to the city overall adjusted for population size. There are more than five times as many fitness and recreational sports centres in the downtown adjusted for population size (Index = 523) and seven times as many full-service restaurants (Index = 731).

Table 11: Selected retail shops and services in the downtown area[6]

	Establishments*	Index: City of London = 100
Retail trade	146	290
Food and beverage stores	29	337
Clothing and clothing accessories stores	30	344
Furniture, appliance, electronics and building materials	11	157
Banking services	13	471
Repair and maintenance services	17	173
Funeral services	5	855
Religious organizations	13	267
Barber shops, beauty salons	26	423
Other personal care services	10	592
Drinking places (alcoholic beverages)	7	979
Full-service restaurants	86	731
Limited service eating places	58	489
Fitness and recreational sports centres	9	523

*With employees. Source: Statistics Canada location counts, June 2020.

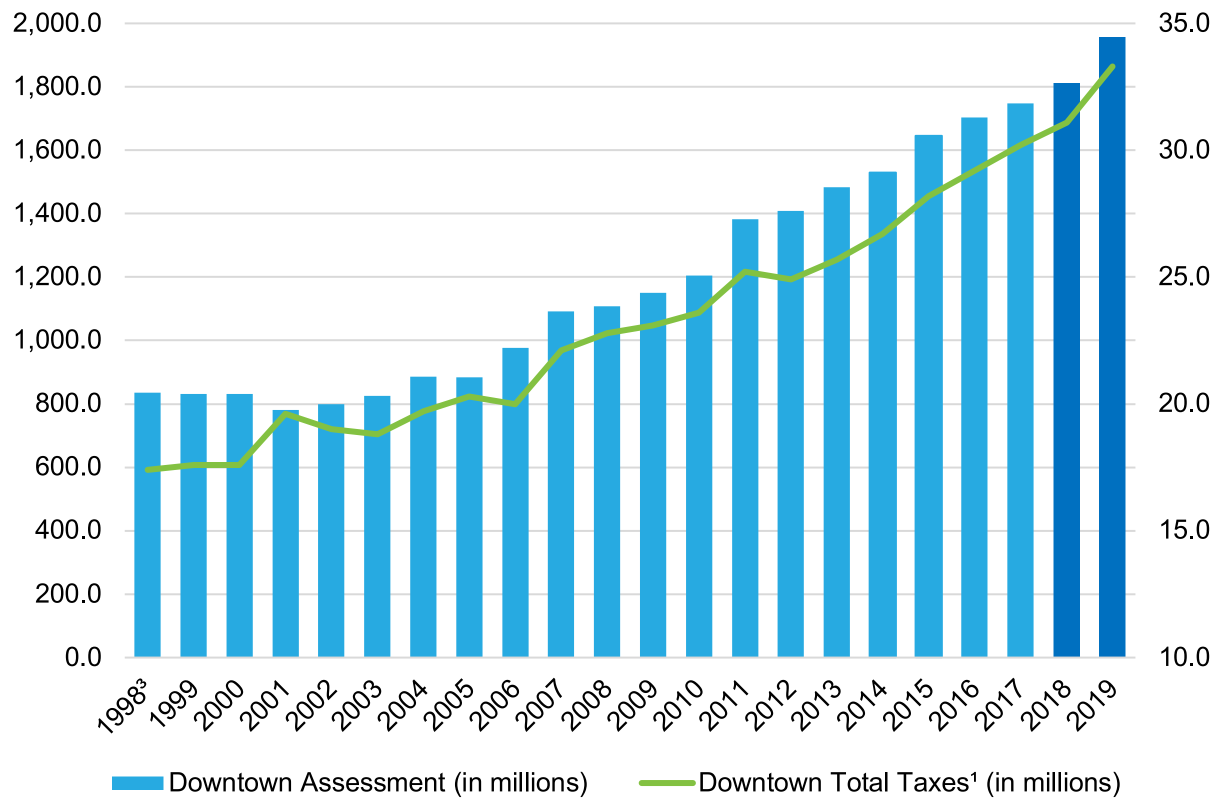
[9] This is based on the wider downtown area as defined in Section xx. The business count data specific to the BIA boundaries is not published by Statistics Canada. It only includes establishments with employees.

4.8 Trend in downtown assessment and taxes

The downtown London BIA covers approximately 0.7% of the city's land area but generates 4.4% of the value of city assessment and 5.5% of city taxes collected (excluding education taxes). Relative to its geographic size, the downtown London BIA generates nearly eight times as much tax revenue compared to the rest of the city.

As shown in Figure 18, annual taxes generated for the city from the downtown have nearly doubled from $17.6 million in 1999 to $33.3 million in 2019. Total assessment increased by $145 million in 2019 or eight percent the fastest annual growth since 2011. The annual growth in tax revenue in 2019 collected from the downtown was the largest increase since 2007. Annual tax revenue from downtown assessment has remained at approximately 5.4% of the city total for more than a decade.

Figure 18: Downtown BIA assessment value and taxes, 1998 - 2019



1. Excludes education but includes general and transit taxes.
Source: Taxation and Revenue Division, City of London.

5 Member Analysis and Levies

The Downtown London BIA is funded by a levy on commercial properties in the BIA geographic area. Each year the BIA determines its budgetary requirements and submits the budget to City Council. Once approved, the budget is translated into an amount relative to the assessed value of commercial properties in the BIA area and levied along with the total property taxes paid. In 2019, the amount of the levy was approximately 0.21% of the assessed value of the downtown/BIA commercial properties.

The BIA levy equates to approximately 6% of the total property tax bill each year. The other 94% goes to the City of London to fund public services and investment.

Downtown BIA members (Levy Payers)

There are 643 different levy paying entities in the Downtown London BIA. Most of them pay less than $1,000 per year into the BIA (52%). As shown in Table 12, over half of all levy payers contribute a total of only nine percent of the BIA revenue from the levy. The largest cohort are those that pay between $1,000 and $4,999. A total of 248 levy payers in this category (39% of the total) contributing 27% of the total amount.

There are 16 levy payers that contribute $20,000 or more each year or 46% of the total.

Table 12: BIA members/levy payers by level of payment, 2020

Levy amount:	#	% of total	Total $$*	% of total
Under $500	159	25%	$39,000	2%
$500-$999	175	27%	$131,000	7%
$1,000-$4,999	248	39%	$509,000	27%
$5,000 - $19,999	45	7%	$362,000	19%
$20,000+	16	2%	$875,000	46%
	643		**$1,916,000**	

*Rounded. Source: City of London

As shown in Table 13, the top five levy payers contribute 36.5% of the total levy each year. The top levy payers are, in order, include Sifton Properties Limited, 2155110 Ontario Inc. (mortgage held by the Caisse de dépôt et placement du Québec), CITI Plaza London Inc., WMJ (LCC) Holdings Inc. and the Canada Life Assurance Company.

There is not sufficient data to determine the breakdown of BIA levy payers by industry (e.g. retail, financial services, etc.). Many of the levy payers are owners of commercial real estate in the downtown that, in turn, lease the property to tenants. We can discern that top levy payers include hotels (Pall Mall Hotel GP, WW Hotels, Royal Host, etc.), financial institutions (Libro Credit Union), insurance (Canada Life) and parking (Station Park).

Table 13: Top Downtown London levy payers by dollar value, 2020

	Levy $$	% of total
Sifton Properties Limited	$185,022	9.7%
2155110 Ontario Inc*	$164,370	8.6%
Citi Plaza London Inc	$138,513	7.2%
WMI (LCC) Holdings Inc	$108,003	5.6%
The Canada Life Assurance	$103,502	5.4%
Farhi Holdings Corporation	$57,156	3.0%
Richmond Block London	$49,880	2.6%
Bluestone Properties Inc	$49,637	2.6%
BSN London Corporation	$47,612	2.5%
Royal Host Gp. Inc. Tte.	$31,650	1.7%
Libro Credit Union Limited	$29,815	1.6%
Bradel Properties Ltd	$28,849	1.5%
Colborne Street Limited	$27,756	1.4%
Station Park (London) Inc	$25,352	1.3%
Pall Mall Hotel Gp. Ltd.	$22,187	1.2%
WW Hotels (London) Company	$21,079	1.1%
Sub-total	**$1,090,383**	**56.9%**
All others	*$825,488*	43.1%
Totals	**$1,915,871**	

**Mortgage held by the Caisse de dépôt et placement du Québec.*
Source: City of London

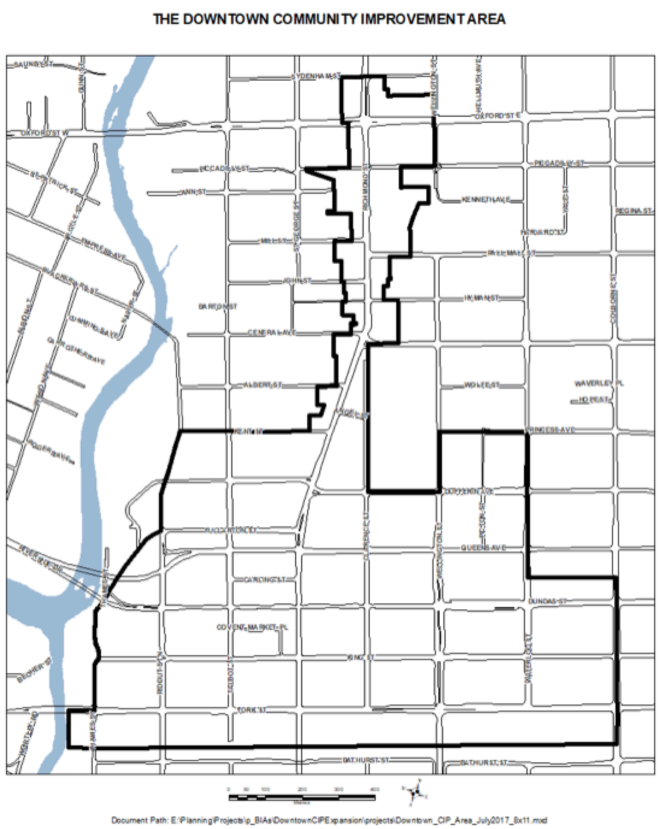
6 CIP Program and Utilization

6.1 City of London Programs

On November 16, 2020 City Council considered recommendations from a staff report entitled Community Improvement Plans: Performance Measures and Indicators of Success[10], that discusses recent grant and loan activity and includes draft proposals regarding possible refinements to the programs including reduction and elimination of one or more of the programs. Information in this section is taken directly from that report.

There are two Community Improvement Plans (CIPs) that are applicable to London's downtown, the Downtown Area CIP and the Heritage CIP. The Heritage CIP is not discussed further in this section as its review, along with the review of the Brownfield CIP, is not currently part of City staff's work program and will remain as is for the moment. Within the area shown on the Downtown Community Improvement Area map below.

Figure 19: Downtown London Community Improvement Plan Area



Number of hectares: 119.9

[10] Novermber 16, 2020
https://getinvolved.london.ca/18093/widgets/71516/documents/43472

6.1.1 Downtown Area CIP Grants

The Downtown Area CIP provides for two grant programs. The **Residential Development Charges Grant** provides a grant equal to a rebate of development charges for residential units constructed. Development charges are required to be paid up-front at the time the building permit is issued or as agreed upon by a Development Charges Alternative Payment Agreement. The program grants back a portion of the residential development charges paid by the applicant over an approximately 10-year schedule until 100% of the residential development charges have been repaid to the applicant. This program works in conjunction with the Tax Grant program.

The **Rehabilitation and Redevelopment Tax Grant** provides a grant equal to a portion of the increase in municipal property taxes that results from renovating or adding onto an existing building, or constructing a new building. Upon completion of the development project and reassessment of the property by the Municipal Property Assessment Corporation, a 10-year grant schedule is calculated based on the incremental municipal property tax increase in pre-project and post-project assessment value. Only the municipal portion of property taxes is included.

In the period from January 2018 to November 2020 there were four active commitments for the Residential Development Charges Grant program. When the report was written in November 2020 there were 19 active Tax Grant applications in the Downtown and the Old East Village and 43 Tax Grant commitments (the report does not distinguish between the two areas). The report noted that it was expected that less than 50% of these commitments would result in a grant agreement and grant schedule mostly because much of the work completed (eg. façade improvements) would not likely trigger a supplementary reassessment by the Municipal Property Assessment Corporation for the improvements made to the property.

6.1.2 Downtown Area CIP Loans

The objective of the **Upgrade to Building Code Loan** and **Façade Improvement Loan** programs is to support the maintenance, improvement, beautification, and viability of the older building stock and, in some cases, support the development of residential units through the renovation, conversion, or adaptive re-use of a property.

The Upgrade to Building Code Loan program provides loans to property owners who improve their buildings for items that relate to Ontario Building Code requirements, Fire Code requirements, addresses one or more health and safety issues, and accessibility and/or environmental sustainability issues. The program provides loans of up to $200,000 or half the value of work, whichever is less. Loans are paid back at 0% interest over a 10-year period.

The **Façade Improvement Loan** program provides loans to property owners for building façade improvements up to a maximum of $50,000 or half the value of work, whichever is less. Loans are paid back at 0% interest over a 10-year period.

Properties within a defined targeted area of the Downtown and the Old East Village are eligible for a portion of the loan repayments to be forgiven in the form of a grant if the ground floor of the property is actively occupied by a targeted use. For Façade Improvement Loans issued after 2018, 25% of the loan repayments are potentially forgivable if all the criteria are met. For the Upgrade to Building Code Loan, 12.5% of the loan repayments are potentially forgivable.

In 2020, the ability to defer loan repayment due to road construction projects was introduced. Further, for property owners who decided to defer, loan repayments have been deferred because of COVID-19 until January 2021.

Because of the COVID-19 repayment deferrals, many of these loans will take an additional 10 months to repay in full.

At the time of writing, there were 48 active Upgrade to Building Code Loans and 28 active Façade Improvement Loans (including two now discontinued Non- Street Façade Improvement Loans) in the Downtown. There were also an additional six Façade Improvement Loan commitments and 11 Upgrade to Building Code Loan commitments where loans would be issued once approved work is completed and paid for in full by the applicant.

6.1.3 Future of the Grant and Loan Programs

As part of the CIP review consultation process, members of the Downtown London BIA and the Old East Village BIA met to discuss potential changes to the grant and loan programs on October 8, 2020. The report noted that there would be additional discussions with BIA members in the future.

The report noted that in 2017 Council directed staff to establish baseline indicators and performance targets and success measures for all CIPs in London. These monitoring and evaluation measures would allow City Council to make evidence-based decisions on whether and when any of the financial incentive programs should be refined, reduced or eliminated. For example, one draft proposed target for the Downtown area (excluding Richmond Row) is to grow the population from 4,415 persons in 2016 to 12,000 people in 2031 with an accompanying increase in residential density from 43.5 persons/hectare to 118 persons/hectare. City staff's draft proposal recommended to gradually reduce the Residential DC over time and eliminate it entirely when the population reaches the 12,000-person mark. The report says that the downtown should, "…become a neighbourhood with the ability to support the needs of the residential and commercial communities."

6.2 Main Street London Programs[11]

In addition to the grants and loans available through the City's Downtown Area CIP and the Heritage CIP, MainStreet London offers an About Face Façade Grant and a Tenant Improvement Loan (for new and expanding businesses).

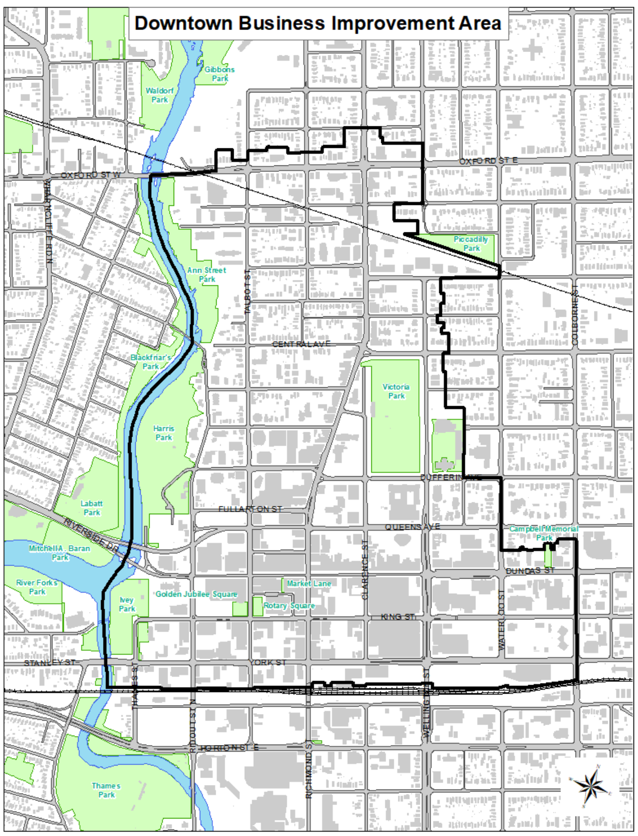
The Main Street London Programs covers the entire BIA area, which differs from the City's CIP program as shown in Figures 20 and 21. The Core Area Community Improvement Plan includes land outside of the LDBA area but does not include all of the LDBA area including a large area in the northwest quadrant of the LDBA.

[11] The Façade Grant and Tenant Improvement Loan programs were discontinued, and funds were re-allocated to a COVID-19 grant program. Additional details about the grant and loan programs including those offered by MainStreet London, can be found at https://www.downtownlondon.ca/wp-content/uploads/2020/06/Fact-Sheets-CIP-2018-F.pdf.

The **About Face Facade Grant** program provides grant funding for registered property owners or business owners with approval of property owner. to improve their building façades. The MainStreet London board reviews plans and estimates and determines a grant amount. The applicant must contribute financially to the project. The grants are be coordinated with City of London incentive programs and property owners must also apply for the City's Façade Improvement Loan.

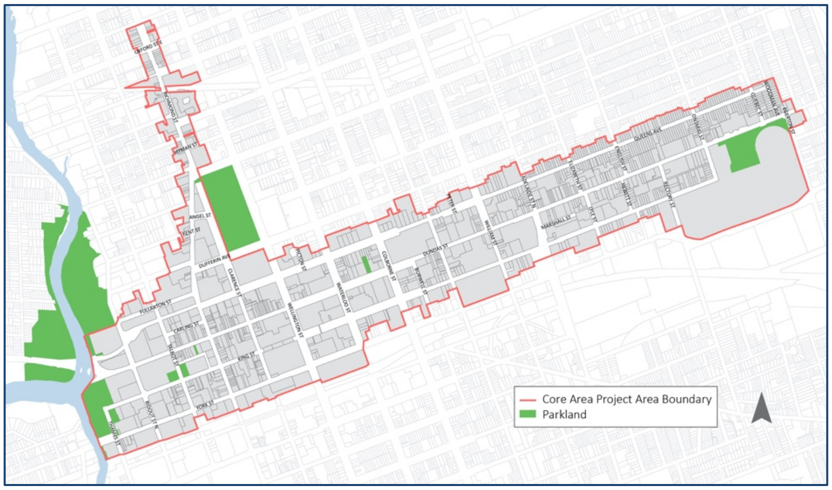
The **Tenant Improvement Loan** program assists qualifying downtown businesses and/or property owners (i.e., a building owner with a minimum of 10% equity in the property or tenant with a signed multi-year lease with the registered property owner) interested in improving their premises for use "by a creative, innovative, new, relocating or expanding business that will attract new customers into the core". Qualifying business owners may be eligible for a five-year, interest- free loan to complete tenant improvements with approval from the property owner.

Figure 20: Map of Downtown Business Improvement Area



Source: City of London

Figure 21: Map of City of London Core Area Project Area



Source: City of London Core Area Community Improvement Plan

Table 14: Incentives offered in downtown London

City of London CIPs	
Upgrade to Building Code Loan	• Loan of up to $200,000 or half the value of the work (whichever is less) with 0% interest over 10 years. • Eligible expenses: fire code requirements, health and safety issues, accessibility and/ or environmental sustainability. • Up to 12.5% of the loan repayments forgivable for qualified applicants
Façade Improvement Loan	• A maximum of $50,000 or half the value of the work (whichever is less) with 0% interest over 10 years • Up to 25% of loan repayments forgivable for qualified applicants
Main Street London Grants & Loans[12]	
About Face Façade Grant	• Grants for registered property owners or business owners with property owner approval to improve the façade • Applicant must contribute financially to the project • Amounts determined by the MSL board based on façade plans and estimates
Tenant Improvement Loan	• Up to a 5-year interest free loan

[12] Additional details on the Mainstreet London program are available at https://www.downtownlondon.ca/wp-content/uploads/2020/06/Fact-Sheets-CIP-2018-F.pdf

	• Loans for building improvements by a creative, innovative, new, relocating or expanding business that will attract new customers into the core.

7 London Downtown BIA Programs and Events

7.1 Special Events

Previous Events
Based upon the supplied 2021 Activation & Special Events Calendar, the majority of annual events were temporarily suspended due to COVID-19. A review of 2019 events (the last full year pre-COVID) is included later in this section.

2021 Events (webinars)

https://www.downtownlondon.ca/explore-downtown/events/

Current events are highlighted on the Downtown London website. The text encourages organizers to submit "any event, big or small, as long as it's taking place downtown!" The webpage also links to Tourism London's events page https://www.londontourism.ca/events/all-events

As of April 2021 (in the midst of a lockdown due to COVID-19) the following events were listed

- London and Area Works Virtual Job Fair
- Strip & Flip Quilt Workshop
- A fundraiser London Gives: A Virtual Gala
- Blue Rodeo – Live (Sponsored by Budweiser Gardens)

2021 Special Events
Downtown London staff have done their best to provide a year long schedule of events while working adapting to the ever-changing provincial COVID-19 lockdowns and rules. Not surprisingly many event organizers have to yet to confirm dates, many have had to move dates, while some events have cancelled for later in 2021 or are planning for 2022.

The event offerings are wide in choice and diverse in content and include music, food, multicultural, arts, and annual events for Canada Day, Pride, Canadian Film, Ghost walk, Halloween, Santa visits and Christmas lights. Downtown London also hosted a Winter Walk using QR codes in decorated windows. The duration of time for these events ranges from an ongoing series offered one a week for eight consecutive weeks to three days within the season. Most of the special events were single day events.

2021 Programs from Downtown London, City of London, Arts Council, Organizers.
Co-organized events with the above partners include fitness and wellness events, sidewalk sales, arts, music and movies.

Downtown Champion Task Force Campaign 2021
The Downtown Champion Task Force is a working group of representatives from downtown businesses and community partners. The group meets monthly and share ideas and develop a framework for potential new marketing campaigns and events. The group is developing new ideas and participating in the development of programs to make the downtown an exciting hub of activities. News of all events and programs will be promoted via Downtown London's website, social media

platforms, digital media (newsletters and email) and print throughout the year from a specific marketing budget.

Task Force participants will have an insider understanding of what is coming and the ability to provide input and feedback throughout the process. All members will be recognized on the Downtown website and across social media and one member will be recognized with The Downtown Champion Award for going above and beyond for their community.

The group has discussed basic marketing channels with more real- life interactions such as contesting, reward programs, participating in online/zoom cooking events with a particular restaurant's chef, once the participant has collected the ingredients from the restaurant.

7.2 Review of 2019 Events and Sponsorships

This section provides a review of the events organized or sponsored by Downtown London in 2019; the last full year of events prior to the COVID-19 pandemic.

Sponsorships:

There were 30 sponsored events in 2019 in the following categories:

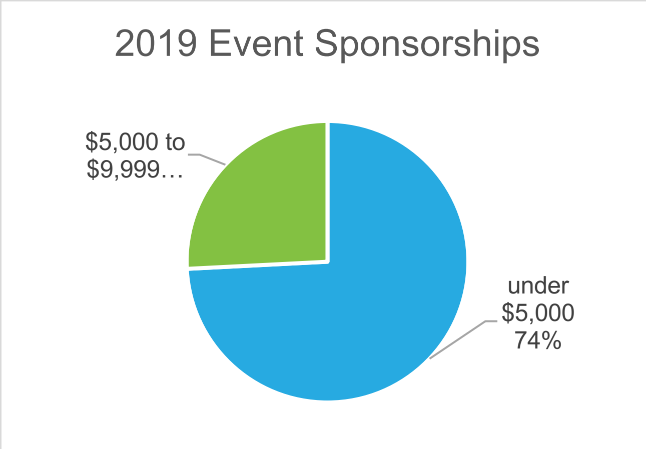
- Marketing
- Member Events
- Community Events
- Tourism Partner Events
- Arts Council, TAP Centre for Creativity Events
- Fanshawe Events
- Downtown Dollar Prizes
- Ticket Purchases
- RBC Place Partner Events
- Award sponsorships

The total investment in sponsored events in 2019 was $128,631. The majority of the sponsorships were under $4,000, ranging from $225 to $3,999.

There were eight sponsorships, representing one quarter of the sponsorships, between $5,000 and $10,000, including sponsorships for London Arts Live, Parkjam and the London Fringe Festival at $10,000 each.

In addition, Downtown London sponsored London Knights marketing at a value of $47,211.

Figure 22: LDBA Event Sponsorship, 2019



Members Events:

There were five member events in 2019, including merchant organized projects and events, one project in coordination with a Dundas Place Partner and two Downtown London Signature Events for a total investment of $24,125

Non sponsored events but supported by marketing downtown events:

There were 33 non sponsored events that were included in Downtown London's marketing including Canada Day, Craft Beer & Food Festival, Sunfest, Farmer's Market, Jazz for the People and Expressions in Chalk.

DTL Superguides activations:

There were 38 superguide activations including a community piano, Art Block Festival, Blind Date with a Book, event flyers and a Garbage mediation program.

8 Marketing Trends

COVID-19 has caused a global paradigm shift in marketing. Deloitte's Global Marketing Trends 2021 describes the following trends that accelerated during the pandemic, are expected to continue into the future and there is a strong probability that nothing will ever be quite the same as it was pre-COVID-19. [13]"

8.1 Global Marketing Trends 2021[14]

- **Empathy and human connection:** The pandemic has reinforced the importance of the human connection and community. People care about their families, friends, neighbours, and

[13] https://www2.deloitte.com/ca/en/pages/consumer-industrial-products/articles/global-marketing-trends.html?id=ca:2ps:3gl:4project_evolve_2020::6er:20211101:GLOBAL_MARKETING_TRENDS
[14] Ibid.

cities. They realize they care about people in other parts of the world, the environment and global health.

- **Customer interaction** is at its core a human experience. Brands need to connect by demonstrating authenticity, empathy and commitment to both stakeholders and communities by satisfying expectations and needs beyond just the purchase journey. Brand trust is built upon what people value and ensuring the brand promise aligns with the organizations ability to deliver.
- **Customer participation:** Successful marketers are creating marketing engagement strategies that lead into and encourages customer participation at its deepest levels. They are using digital tools to deepen relationships by uncovering and understanding what people value and then addressing how those values influence behavior.
- **Data driven personalized connections**: Successful organizations will create and activate human experiences by leveraging data and using customer insights to uncover and customize uniquely personalized interactions with their stakeholders.

8.2 Predicted Marketing Landscape by Communication Tool

8.2.1 Content creation and delivery

Content continues to be king[15] in 2021. Inbound and outbound marketing tools are becoming more sophisticated by the day, offering more opportunities to organizations to laser target audiences, and deliver exactly what that identified audience wants, exactly when they need require it. Staying aware of the growing sophistication and greater expectations of end-users of all marketing content is critical.

8.2.2 Developing content with what you have

The COVID health crisis and the limitations of human interaction forced brands to think of other ways to market their products and engage viewers. They realized that user generated content (UGC)[16] was a practical way to generate content that would engage, entertain, and publicize the human experience with the brand products. UGC has been used by social media influencers as testimonials or endorsements. Brands have seen the benefit of showcasing raw and genuine customer footage in their advertising to boots brand authenticity. Two examples of the user generated content are the "To those who mother". Mother's Day Campaign for Iconic Clothing Company[17]. and "Cooking with Colin" in partnership with the Australian Pork Board[18]

On the extreme opposite end of UGC is high quality branded content, showcasing very high standard of execution while remaining relevant, human, and promote the brand product(s). A brilliant example is "The Whole Working from Home Thing" by Apple[19]

---

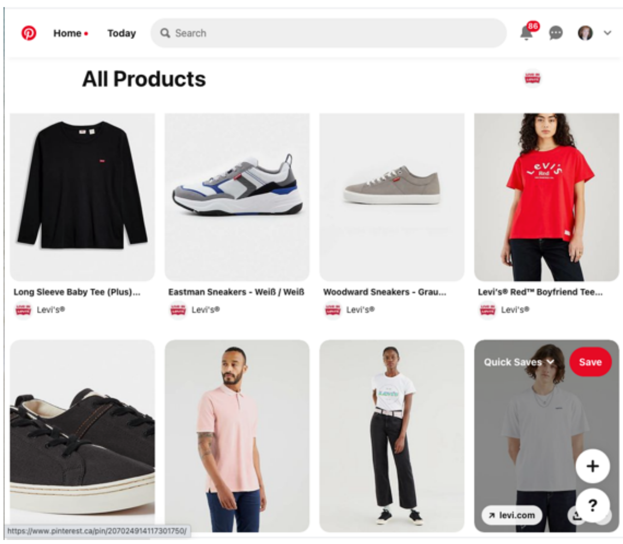
[15] https://www.cmswire.com/digital-marketing/the-results-are-in-content-is-still-king-in-2021/#:~:text=The%20Results%20Are%20In%3A%20Content%20Is%20Still%20King%20in%202021
[16] https://m.youtube.com/watch?v=huU_0WYO5Z8
[17] Iconic Clothing Company Mother's Day Campaign https://m.youtube.com/watch?v=reDxSE8BwHw
[18] Australian Pork Board Cooking with Colin campaign https://m.youtube.com/watch?v=viaX67uPHI8
[19] Apple's, The Whole Working from Home Thing, https://m.youtube.com/watch?v=6_pru8U2RmM

8.2.3 Social Commerce

Social commerce is the next generation of e-commerce, (think amazon and social media combined) to provide a seamless shopping experience via a range of social media shop fronts, shoppable posts accessed through social media feeds. Instagram is leading the way by providing a far more authentic experience to shoppers than the website shop front. Pinterest is also gaining momentum with saving a pin which is attached directly to the sales site. Hootsuite, a social media dashboard network estimates that livestream shopping in the US will generate $25 Billion in sales by 2023.[20]

Levi's' Pinterest page demonstrates the immediacy and ease of use of use of social commerce platforms.

Figure 23: Social Commerce, Levi's Brand Pinterest



Source: https://www.pinterest.ca/levisbrand/_shop/4672925082001/

8.2.4 Social media interactions

Brands are realizing that many, as much as 68%, of people feel that brands do not share interesting social content. Smart brands are focusing on social listening and, when the time is right, releasing content that is relevant, lighthearted, and fun.

Buyers are more likely to be influenced by their peers than a brand. User-generated content and opinions will influence buying decisions more than a brand's advertising. Brands are searching for new ways to engage consumers and encourage user-generated content aligned with their products.

According to Hootsuite, baby boomers (age 55 to 64) joined the online shopping trend in larger numbers in 2020 because of the pandemic, with 70% of boomers purchasing online. Both their spending and social interaction is expected to continue to increase[21].

[20] Hootsuite
[21] https://www.hootsuite.com/research/social-trends

Social media adding to the storytelling

Augmented Reality (AR) technology projects virtual, computer generated augmentations onto real world settings. It includes filters used in social media while recording footage for a story, snapchat, a post or while chatting on a video call.

Personalized Marketing

Brands are creating personalized marketing to provide a unique experience for the customer, based upon what they know about them. Because so many people are on social media it has become easier to personalize brand experiences by using customer data and pinpoint targeting. The pandemic has given marketers renewed appreciation for social media as a strong bridge to connect with customers.

8.2.5 Connecting and interacting with content

Industry watchers reported that YouTube usage grew by 80% in 2020 with over 500 hours of video are uploaded every minute[22] This platform, already the world second largest search engine and second most visited site after Google[23], with an average view time of 40 minutes[24] will continue to grow and quite possible dominate in the next five years. YouTube CEO Susan Wojcicki's 2021 priorities are: "… growing the creator economy, living up to our responsibilities, helping people learn new skills.[25]" YouTube demonstrates they are planning to leverage the opportunities arising out of the pandemic lockdowns.

Every individual interacts with content in different ways, customizing what works best for them. Videos convey a message quickly, are easily consumed and can be used across many platforms. Think Media provides a detailed analysis of the future of video starting with a channel strategy[26].

8.2.6 Solutions to the loss of "in person" events

COVID-19 restrictions forced event organizer, event participants and the public to completely re-imagine how their beloved concert, book festival or sporting event was to be delivered and consumed. Although these virtual solutions will never replace the real-life experience, in some instances event organizers have expanded on ways to extend the event experience. Consumers could purchase tickets to join the actual event (via zoom or the technical equivalent) for a price of admission, take a "week-long" admission pass, with access for a limited amount of time to experience the live event. Event organizers could then use the live event content to promote the next event.

[22] https://www.brandwatch.com/blog/youtube-stats/#:~:text=500%20hours%20of%20video%20are,lasts%20more%20than%2040%20minutes.
[23] Ibid.
[24] Ibid.
[25] https://blog.youtube/inside-youtube/letter-from-susan-our-2021-priorities/
[26] The Future of Video in 2021, Think Media, https://m.youtube.com/watch?v=dcvbSyL2GkA

8.2.7 The graphic look of content

Being in lockdown, people have realized just how important nature and outdoor experiences are to their mental & physical well-being. This appreciation for nature is being reflected in marketing elements from organic textures, natural shapes, botanicals and neutral colour palettes.

Expanding on the organic theme, “handmade”, “personal” “DIY” look, and feel is resonating with many consumers to support their altruistic efforts to support local artisans and give back to their community.

Hand drawn marketing elements continue to build in popularity, enabling complex concepts to be expressed in unique illustrations that allow for graphic styles to tap into emerging trends of organic and nature-based elements but provides a “handmade warmth” to corporate marketing materials.

8.2.8 Remembering a better time

A trend for Nostalgia grew throughout 2020 and is continuing to build momentum. To counteract the anxiety of unpredictability and loss of control due to the pandemic, nostalgia and imagery, products and experiences that support the need for “comfort, familiarity and reassurance” are providing consumers with a trip down memory lane to a happier, safer, and simpler time.

8.2.9 Brand activism

In the wake of social upheaval and growing support for addressing environmental concerns, consumers are demanding that brands take a political position and showcase their values and political viewpoints, especially for social equity and environmental causes. A recent Lego video for example highlight’s the company’s commitment to environmental responsibility and supporting creativity and learning[27].

8.2.10 Changing website ranking

Google has announced a move to “Google Core Web Vitals” to assess website page experience and google search ranking. The assessment of the user experience will be measured by Google’s standards for website loading, interactivity and visual stability and will impact website ranking. Marketers are preparing now to ensure their websites will address this new measurement system to ensure high Search Engine Optimization (SEO).

8.3 Implications of the Pandemic on Downtowns

The Progressive Urban Management Associates (PUMA) Global Trends Report – Pandemic Update identified a variety of trends expected to accelerate due to the pandemic, with specific considerations for downtowns[28].

The PUMA report predicts that younger generations are more likely to return to social gatherings and pre-pandemic preferences quickly. Once conditions stabilize, it anticipates a surge in demand for entertainment, dining and services that appeal to younger demographics. Baby boomers are most

[27] https://m.youtube.com/watch?v=QkH13mO0uog
[28] Progressive Urban Management Associates, Top 10 Global Trends Affecting North American Downtowns, Pandemic Update, July 2020

likely to change behaviour moving forward and older groups will be reluctant to gather and the last to recover.

The trend towards online sales is expected to continue. Local independent and experiential retail will be important to distinguish downtowns. Stores that demonstrate social impact and community service will command a premium. PUMA predicts a surge in entrepreneurship “that can be focused to fill and enliven storefronts”.

Younger demographics are expected to continue to drive demand for downtown living although the preference for larger units may emerge after months of lockdown. The report also predicts that pandemic experimentation in public spaces could “accelerate trends to close streets, activate sidewalks and enliven plazas”, increase demand for safer bicycle and pedestrian movement and “accelerate the trend to diversify beyond autos”.

9 Marketing Best Practices

Downtown marketing can be divided into four categories:

- Image development – Building an image that accentuates the positives and dispels the negatives
- Retail/Business Promotions – Initiatives to generate immediate sales
- Special Events – Efforts focused on generating traffic, activity and positive experiences
- Place making – Creating authentic experiences to attract locals and visitors

This section provides case studies of BIA marketing efforts in these four categories.

9.1 Downtown Winnipeg

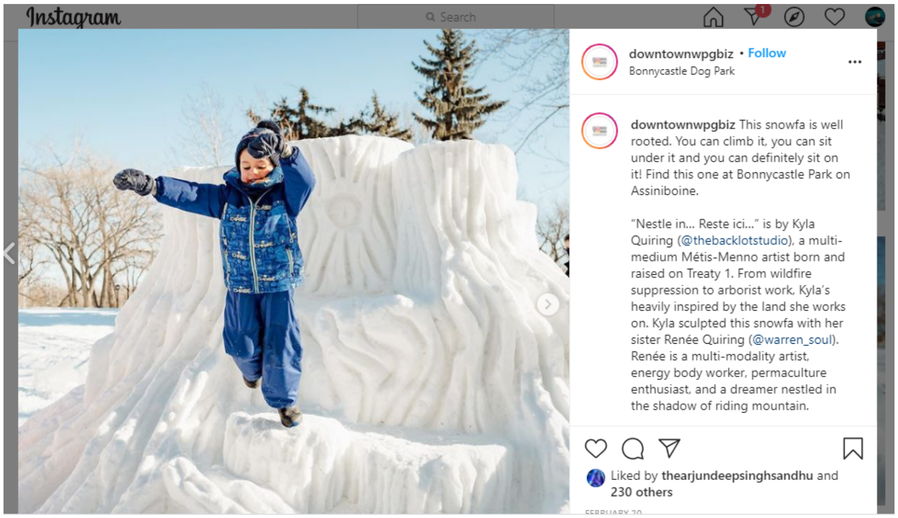
Figure 24: Winnipeg BIZ logo

DOWNTOWN WINNIPEG BIZ

Brand image development – Downtown Winnipeg BIZ is a leader in brand image development starting with the positive messaging on the website home page, “Despite a challenging year, the future of downtown remains bright.” The Business Improvement Zone (BIZ) engages the community on its social media accounts via the #FinditDowntown campaign.

In February 2021, Downtown Winnipeg created “There’s Snow Place Like Home” campaign. Seven SNOFAs (larger than life size sofas made of snow) were created by local artists, coordinated by the Festival du Voyageur, and placed in public spaces. Accompanying signs directed participants to Downtown Businesses where they could find sweet treats. Participants were also encouraged to share their images via social media with the hashtag #snowfa.

Figure 25: Special Events Example, Winnipeg BIZ



Source: https://www.instagram.com/p/CLh7ZdfAeL4/

The Downtown Winnipeg Instagram feed demonstrates the organization's values including support of independent businesses, social issues such as Black Lives matters; COVID-19 safety protocols and volunteers contributing to the downtown's beautification efforts.

Social Activism: Winnipeg promotes its annual Earth Day as a signature event involving Downtown Winnipeg BIZ business and community members.

A combination of placemaking and social activism, 2021 will mark the sixth year of its Indigenous Gardens. The planting of the garden at Air Canada Park will begin with an elder blessing of the plants. The blessing will be live streamed on the Downtown Winnipeg BIZ Facebook page. Volunteers will then plant the garden following physical distancing protocols.

Retail/Business Promotions: Downtown Winnipeg BIZ created #Openwithcare to support Downtown Winnipeg businesses. The BIA provides businesses with PPE and materials to demonstrate the businesses' commitment to operating safety while instilling trust in the public to continue shopping, eating, and exploring downtown safely.

The Downtown Winnipeg BIZ pandemic-related assistance zone includes:

- Offering a $1,000 micro-grant program to small businesses negatively impacted by COVID-19
- Providing designated curbside pickup locations
- Working with the city to provide one-hour free parking downtown
- Enhancing cleaning measures for high-traffic areas like bus shelters

Shoppers are encouraged to support Local by partnering with GoodLocal (everything good and everything local), a conduit between local buyers and sellers via an online store. Products are sold by category. Customers orders over $75 can be delivered, for free. Shoppers are reminded that they are supporting 100% local vendors and they can feel good in the knowledge that this helps to re-invest in local businesses.

The Downtown Winnipeg website includes a comprehensive “Downtown Marketing Toolkit” for local businesses to download. The toolkit provides information on available marketing tools with instruction on how to use them. It also includes tips on how to work with the Marketing, Events and Communications Team and learn about the news, promotions, and events that further the Downtown BIZ brand.

Special Events: “Fitness in the park” is an inclusive and fun event of free lunch time fitness class outside. The Downtown music festival series featuring local musicians and a downtown farmers market.

Figure 26: Special Events Example, Winnipeg BIZ

Source: https://downtownwinnipegbiz.com/event/fitness-in-the-park-2-2021-06-15/

Place making: Successful place making is a complex mixture of the elements that combines to make a unique place to the people who live, visit, shop and do business in its vicinity. Downtown Winnipeg clearly has a community that is proud to call Winnipeg their home. Downtown Winnipeg BIZ even has cool Downtown Winnipeg “merch” (minimalist T-Shirts and coffee mugs) for the community to proudly share the love for downtown.

Figure 27: BIA Merchandise, Winnipeg BIZ

Source: https://downtownwinnipegbiz.com/merch/

9.2 Downtown Toronto East – Leslieville BIA

Brand image development

Leslieville's logo captures the essence of their particular place. The font is unique and handwritten, denoting individualization and creativity. The colours suggest diversity, a proud and social community, with residents are friendly, who love their park space to gather and enjoy their lifestyle. The logo is also well suited to use across their social media platforms as it is simple and memorable. This logo was extended across the physical city area by painting public benches and placing banners along Queen Street.

Figure 28: Consistent branding and colour applications, Leslieville BIA

Source: https://www.visitleslieville.ca/

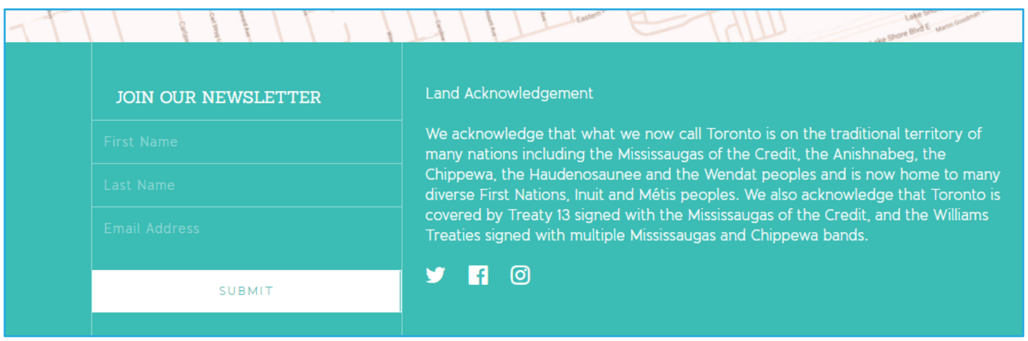
The hand drawn illustration of people working, living, and playing, intertwined with individual letterforms on Leslieville's BIA homepage and throughout the entire website expresses Leslieville is a diverse, hip neighbourhood (which it is) its tagline supports the image "It's better in the "ville".

Figure 29: Website Example, Leslieville BIA

https://www.visitleslieville.ca/

Social Activism: At the bottom of every webpage is a Land Acknowledgement statement. Leslieville BIA supports "Neighbors in Need", a small business initiative under their "Donations Directory" section of the site. The initiative is locally organized and supported by the BIA to assist individual businesses or organizations suffering because of the pandemic, to connect with local donors via a donation directory.

Figure 30: Land acknowledgement example, Leslieville BIA



Source: https://www.visitleslieville.ca/

Downtown Leslieville's website includes a simple and very easy to use business directory, clustered by four main categories: Arts & Culture, Food & Dinning, Retail, Services. Under these categories are seven more focused entry points Bars, Beer & Spirits, Café & Bakery, Fast Food, Grocery & Variety, Restaurants and Specialty Foods.

DOWNTOWN LONDON RE-IMAGINED

Figure 31: Business Directory Example, Leslieville, ON

Source: https://www.visitleslieville.ca/business-directory/

Visitors can search businesses alphabetically or use a general category search. Each business has its own mini portal. The directory is simple to use and gets the user to where they need to go quickly. An individual business section shows the businesses logo, their physical street address, and a "bio" pop up for its "story", with direct links to the businesses' own website and social media platforms.

Figure 32: Business Directory Details, Leslieville BIA

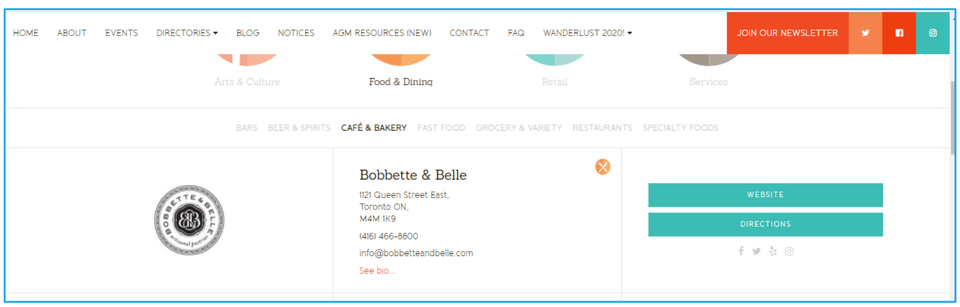
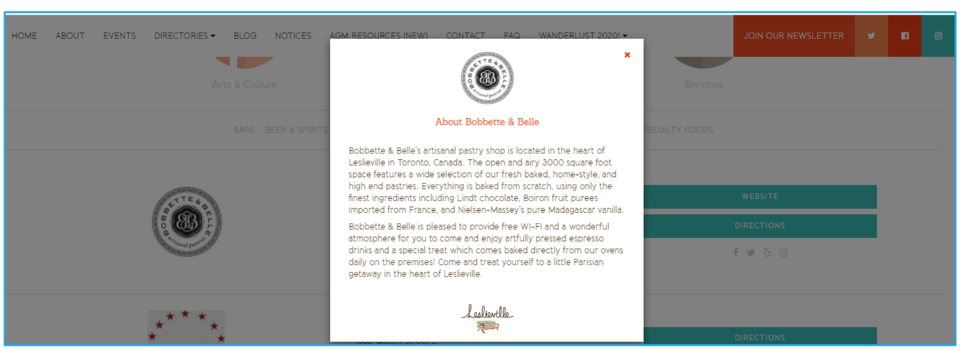


Figure 33: Business Directory Example, Leslieville BIA



Source: https://www.visitleslieville.ca/

Special Events: Due to the current lockdown the Events page is empty but the blog section indicates that community events will return when it is safe to do so.

The Leslieville BIA produces an annual digital gift guide (to read online as a magazine through issuu[29] or download as a PDF[30]) for the Christmas season. The 2020 gift guide was released with a launch party on YouTube.

Place making: The true goal of place making is; to align the inherent strengths of a place with it's people, businesses and investment so that as a destination, visitors come and experience an authentic brand promise. Leslieville BIA delivers to that strategy from a strong and clear brand, that is echoed across every piece of it marketing material. The geography is defined by the colourful benches, murals and banners across the region. Their 8th anniversary message from Mayor John Tory encapsulates that alignment from the City level[31].

10 Governance

The following excerpt from the Province of Ontario Business Improvement Areas Handbook provides direction for the board of management structure and typical roles for board members

"Board of management - Overview
Administration and strategic management of a Business Improvement Area is generally the responsibility of the board of management. In particular, the board of management is typically responsible for overseeing the planning, budgeting, implementing and evaluating of BIA projects.

Rules in the legislation (the *Municipal Act, 2001* and *City of Toronto Act, 2006*) may apply to the term of directors of a BIA board of management. Traditionally:

- The term of the directors of a board of management is the same as the term of the council that appointed them, but continues until their successors are appointed
- Directors are eligible for re-appointment

Traditionally, the municipality appoints one or more directors directly and the remaining members are chosen by a vote of the membership (and later approved by municipal council). The board of management usually consists of between five and ten members.

In most cases, council designates a position on the board of management for the local councillor that represents the area within which the BIA is situated. Apart from the position on the board usually reserved for council appointees, the rest of the board is selected through a vote by the BIA membership subject to their approval by council.

Typical roles of the BIA board of management
Composition and activities of the board of management and its officers:
The BIA board of management typically establishes or makes recommendations to council about rules for the composition and activities of the board of management and its officers (e.g., chair, vice-chair, treasurer).

[29] https://issuu.com/hexcode/docs/wanderlust_giftguide_2020-dec-13
[30] https://www.visitleslieville.ca/wanderlust-gift-guide/
[31] https://www.visitleslieville.ca/about/

Among the issues often considered are:

- The size of the board of management
- Officer positions
- Rules for quorum
- Procedures for vacancies
- Responsibilities of the board
- Duties and responsibilities of board of management members and officers

BIA Boards of management also often form rules on:

- Creation, functions and meetings of committees and sub-committees
- General meetings of BIA
- Annual budget
- General expenditures
- Rules of order
- Contracts
- Elections
- Voting/proxy voting

Budgets, funding and financial and annual reports

BIA boards of management traditionally submit their annual budget estimates for council approval. Traditionally, BIA boards could not spend money unless it was included in the estimates, or in a reserve fund. In addition, such boards could not borrow money, and could not incur debts extending beyond the current year without prior council approval. Finally, boards traditionally submit to council an annual report including audited financial statements for the preceding year, by the date and in the form set by council.

The BIA board of management generally exercises a number of informal responsibilities. These often include:

- selecting an executive
- establishing and reviewing committees
- hiring staff
- establishing BIA policies, constitution, and operating bylaws
- reviewing and assessing BIA programs and projects"[32]

[32] Managing and Operating a BIA, Province of Ontario https://www.ontario.ca/document/business-improvement-area-handbook/managing-and-operating-bia

The following table provides examples of BIAs across the country and their governance models

Table 15: BIA Governance Examples

Organization	# of board members	Levy	Governance Notes
Downtown Windsor	11 incl chair and past chair	$643,172 (2019)	Board membership includes: Member at large, professional services, bars & nightclubs, restaurant (unlicensed), restaurant (licensed), retail, professional services, commercial property owner/developer, municipal representative Mission and vision available online Minutes & audited statements are posted online https://www.downtownwindsor.ca/about/board-of-directors/
Downtown Kitchener	11 including Executive Director	$1,379,000 (2019)	Board membership includes: Executive Director and 2 municipal Councillors. There are also 4 ex-officio members (Mayor, 2 economic development staff and 1 police services) Separate marketing committee listed Minutes available online https://downtownkitchenerbia.ca/team-and-board
Downtown Guelph	12 voting directors and 3 nonvoting positions	$660,000 (2020 & 2021)	Board membership includes 12 voting directors with a 4-year term and 3 non-voting positions filled by representatives from the Chamber of Commerce, University of Guelph and City of Guelph https://downtownguelph.com/about/ Minutes available on request
Downtown Hamilton	11 board members	$400,000 (2021)	The 11-member board includes 1 member of City Council 453 businesses and 173 property owners AGM minutes available online Mission & vision available online http://downtownhamilton.org/
Downtown Winnipeg	15 board members	$3.1 million (2020)	The 15-member board includes 1 member of City Council

Organization	# of board members	Levy	Governance Notes
			Strategic Plan and Annual Report available online https://downtownwinnipegbiz.com/what-we-do/
Downtown Calgary	10 board members	N/A	In addition to the 10 board members, there are 2 non-voting, Council representatives https://downtowncalgary.com/about/
Downtown Rideau (Ottawa)	8 Board Members not including Executive Director	$915,241 (2019)	The Board includes 1 member of Council and has 1 Committee (Finance and Governance) and 2 Advisory Groups (Clean and Safe & Marketing and Tourism) https://www.downtownrideau.com/about-us/structure/

The City of Calgary has established the following principles of good governance for BIAs which have application for all downtown business associations including Downtown London[33]:

- Establish a clear mandate.
- Conduct annual governance orientation.
- Communicate clearly to board members re: roles and responsibilities.
- Apply a comprehensive and transparent decision-making process.
- Full disclosure of relevant information.
- Ensure decisions reflect taxpayer values and concerns.
- Employ ongoing and effective fiduciary monitoring.
- Use a feedback mechanism.
- Continually report on results and accountability.
- Understand board responsibility and liability.

11 Parking

Downtown parking practices vary considerably among Canadian cities depending on conditions such as overall city size, the state of the transportation systems that provide convenient access to and from the downtown, the range, scale and type of existing land uses, and the location and type of existing and planned parking spaces. Some cities also have municipal and/or downtown parking strategy.

London's Downtown Parking Strategy which as prepared in December 2017 by the BA Group in association with Kimley Horn and Read, Jones Christopherson, contains an Appendix B entitled Parking Management and Design Best Practices that delves into things like communication and community engagement, branding, safety and security, and Transportation Demand Management. This report provides the City and community stakeholders with a comprehensive review of parking strategies and management practices. Having said that, the field is always evolving, and this report

[33] https://www.calgary.ca/business-economy/csps/abs/bia-board-governance.html

provides some examples of Canadian BIAs contributed that have found new ways to address downtown parking issues and opportunities.

11.1 Downtown Edmonton, Edmonton, AB

City Council in the City of Edmonton voted to enable Open Option Parking city-wide effective July 2, 2020. This means that minimum on-site parking requirements have been removed from Edmonton's Zoning By-law so that developers, homeowners, and business owners are now responsible for deciding how much parking to provide on their properties. The implication for Edmonton's downtown is that developers can potentially make more effective use of the land that is available for development and redevelopment and reduce costs associated with the provision of surface and/or structured parking. Maximum parking requirements have been retained for the Downtown.

11.2 Downtown Winnipeg BIZ, Winnipeg, MB

Downtown parking supply is not an issue. There are over 3,200 on-street parking spots and several parkades located throughout the Downtown. The cost of parking, however, is an issue. Advocacy efforts led by the Downtown Winnipeg Business Improvement Zone (BIZ) in 2020 led to a $0.75 reduction in hourly parking rates, effective July 1, 2020, a 1-hour free parking program and a commitment to a new city parking strategy by 2021.

11.3 Downtown Rideau BIA, Ottawa, ON

Downtown Rideau is a leader in providing an effective on-line presence on matters relating to parking. The BIA's website contains clear and easy to use links to a colourful and easy-to-read parking map and the websites of the 6 main organizations that provide parking in the BIA. It even provides a link to BestParking.com, a privately operated website which allows users to search parking locations and costs in the downtowns Rideau and other locations across North America. Sample screen shots of the website are shown below.

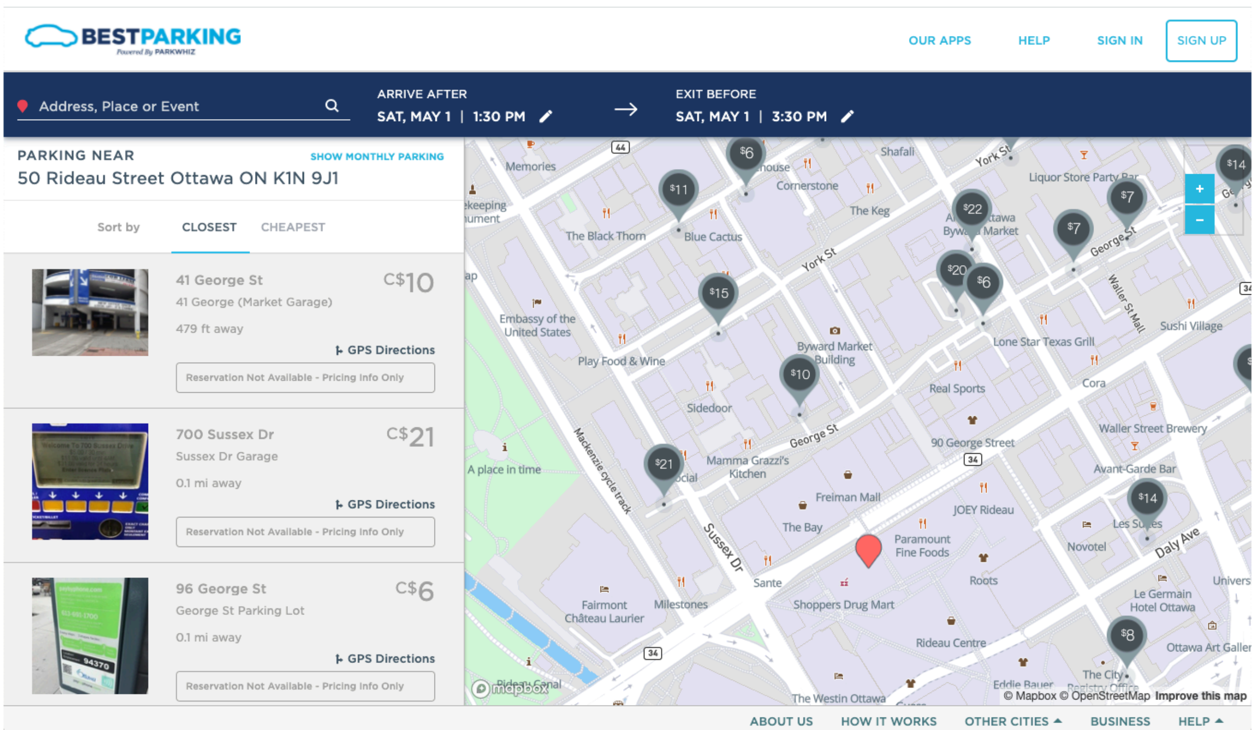
Figure 34: Parking map, Rideau BIA, Ottawa

Source: https://www.downtownrideau.com/programs/parking/

Figure 35: Parking Suppliers, Rideau BIA, Ottawa

Source: https://www.downtownrideau.com/directory/?category=parking-and-visiting

Figure 36: Third party parking map and review



Source: BestParking.com

12 Business Attraction and Retention

The role of BIAs in business attraction and retention varies considerably across the country. Many BIA websites contain no references to these matters at all, aside from special initiatives that have been undertaken to help businesses deal with the negative effects of COVID-19.

In most communities, business attraction is the responsibility of the municipal economic development department or agency and/or the Chamber of Commerce. The BIAs work collaboratively with these organizations to attract businesses to their respective downtowns. Financial incentives such as grants and loans and development charge reductions or exemptions are common in many Canadian downtowns, but they are almost exclusively provided and managed by the municipalities, rather than the BIAs.

This section provides several case studies showing different approaches for business attraction and retention.

- The Downtown Edmonton Business Association (DBA) uses a committee to address business attraction and retention,
- Communities in the Niagara Region use a diverse array of grants and loans to attract businesses to and support businesses in their downtowns,
- The City of Kitchener has structured two new programs to provide relief to existing businesses that have been hurt by the pandemic.

12.1 Downtown Edmonton, BIA Accelerating Tech

In Edmonton, business attraction and retention is overseen by a 16-member Business Recruitment Committee (BRC) whose members are experienced real estate and property management executives who have an interest in Downtown Edmonton. In 2019 the DBA (through the BRC) partnered with the Alberta School of Business and hired an MBA student to examine the Downtown tech ecosystem and provide recommendations for further growth. report, entitled “Accelerating Tech in Downtown Edmonton: Impacts and Opportunities” was released in August 2020 with five recommendations:

1. Establish a Downtown Accelerator to increase the number of successful and investable companies.
2. Continue to develop tech-focused office space.
3. Retain homegrown talent by collaborating with post-secondary institutions to secure jobs for our talented graduates.
4. Continue to enhance the urban experience to attract top caliber tech talent
5. Collaborate with Edmonton Advisory Council on Startups (EACOS) and other organizations in the ecosystem to connect the tech community to the broader Downtown business community.

The BRC to works with City staff to improve business permit times and reduce red tape and has directed sponsorship dollars and marketing support to the City's Small Business Series which includes workshops and presentations to help small business prepare for the regulatory process.

12.2 Welland's Downtown CIPs

Many Canadian municipalities provide some form of financial incentives to attract and retain businesses in their downtowns. Municipalities in Niagara Region have long provided a very broad range of incentives as a means of trying to offset investment and employment losses due to a steep decline of the automotive-related businesses over the last 20 years. There is a plethora of financial incentives available to existing and future businesses in many of the region's downtowns.[34]

This section highlights the range of financial incentives that are available in the City of Welland. The Town of Welland has some unique incentives intended to develop a Wellness Cluster in the downtown. There are two CIPs that apply to downtown Welland; the **Downtown and Health and Wellness Cluster CIP**[35] and the **Brownfield CIP**.[36] Together, the CIPs provide a comprehensive array of financial incentives designed to foster investment and improvement in existing businesses, stimulate new investment, and enhance the design of the buildings and overall quality of the streetscape.

The Downtown CIP provides for the following financial incentive for existing and/or new businesses:

- Urban Design Study Grant Program
- Façade Improvement Grant Program
- Building Improvement Grant/Loan Program
- Residential Grant/Loan Program
- Tax Increment Grant Program
- Development Charge Reduction Program (25% reduction for Wellness-related uses)
- Planning and Building Fee Grant Program

The Brownfield CIP focuses primarily on the redevelopment of vacant or unused sites and provides an/a:

- Environmental Site Assessment Grant Program
- Tax Assistance Program
- Rehabilitation Grant Program
- Planning and Building Fees Refund Program.

12.3 Downtown Kitchener Community Builder Program

The Downtown Kitchener BIA worked with the City of Kitchener to develop a financial incentive program and expanded the range of traditional incentive programs to focus on helping groups of downtown businesses to work together to host events and programs.

[34] The federal government has also designated a portion of Niagara Region as a Free Trade Zone.
[35] https://www.welland.ca/Planning/DowntownCIP/DowntownHWCIP-Report.pdf
[36] https://www.welland.ca/Planning/BrownfieldIncentive/Brownfield_Community_Improvement-Plan.pdf

The **Downtown Kitchener Community Builder Program** provides grants of up to $10,000 for events that:

- Showcase local businesses, arts and culture and/or community organizations
- Encourage the development of new partnerships through local businesses
- Involve promotion of a minimum of three (3) Downtown businesses
- Are accessible and open to the general public

Examples of qualifying events include block parties, arts and culture events, cross-sector events, and outdoor murals.

Downtown businesses are also available for funding under the **COVID-19 Business Sustainability Grant Program** which help downtown businesses develop or refine online platforms. Funds are available to applicants looking to invest in: digital marketing; e-commerce platforms; website enhancements for e-commerce; brand photography; and other costs related to reconfiguring for social distancing, such as: PPE (Personal Protective Equipment), sneeze guards, etc. A second round of the program made available in October 2020, provided qualified applicants with funding to assist with advertising, live entertainment and “additional programming initiatives.”[37]

13 Attracting people to live downtown

Residential development is fundamental to the vitality of downtowns. A 2019 report published by the International Downtown Association (IDA) concluded that residential growth in the downtown would be even more important in the years ahead as the “traditional, office-segregated central business district model may no longer be sustainable.”. Growing the downtown residential population is “critical to the survival of small businesses and community in dense urban districts”. Efforts to attract population downtown across the United States are having success. Of the 37 of the larger downtowns in the United States included in the IDA study, between 2000 and 2018 downtowns outpaced residential growth compared to the rest of the city growing an average of 40% against the citywide average of 15%.

13.1 The case for living downtown

If the City of London wants to attract people to live downtown, there needs to be a strong value proposition for living downtown. The evidence across North America is that people are moving downtown but are looking for specific attributes such as:

- A safe and healthy environment: Resident do not want to feel unsafe in their downtowns.
- A vibrant retail sector: Residents are looking to live in downtown neighbourhoods with most services available within close proximity. This is central to the value proposition for downtown. As one example, in recent years large format grocery stores have been locating in downtowns across North America.
- Creative and cultural hub: Downtown London already has considerable strengths in this area.

[37] Additional information on Downtown Kitchener’s Grants and Incentive programs is available at https://downtownkitchenerbia.ca/grants-and-programs

- Housing: It is important to offer a wide range of housing options: from small units for young professionals, to family focused dwellings and luxury housing. Further, cities that are growing their downtown populations have been putting a focus on reasonable housing costs.
- Schools: For several years, the City of Montréal has focused on attracting people to live downtown and that led to a large number of new luxury housing units and smaller units for young single professionals. The city had considerable success attracting young professionals, but many would leave after having children as the downtown was not perceived to be family friendly. In its most recent downtown development strategy, the city focuses on building family housing and planning community facilities needed by families with "elementary schools topping the list".
- Attractive, safe, and accessible public spaces including parks, plazas/squares and sidewalks.

13.2 Campaigns to attract people to live downtown

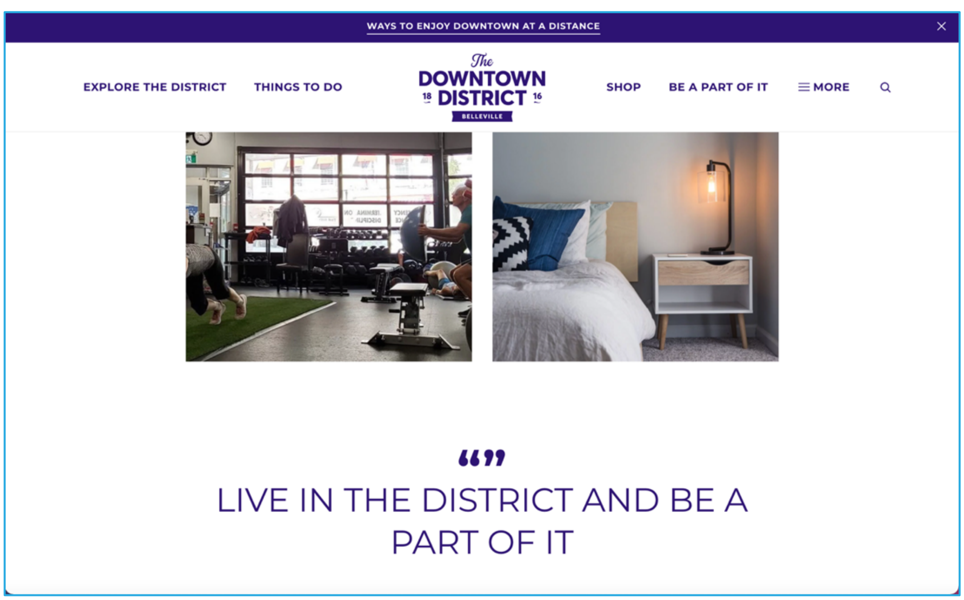
While there are some organizations that are actively working to attract people to live in the downtowns of mid-sized and larger urban centres such as London, they are mostly in the United States. In Canada a few smaller city BIAs have invested in people attraction initiatives.

These downtown resident attraction campaigns focus on branding downtown living targeting a wide range of demographic groups. The section highlights a few examples of cities that are actively working to attract people to live downtown.

13.2.1 Belleville, Ontario's 'Live in the District' campaign

The Belleville Downtown District BIA has a specific campaign to attract people to live downtown. The 'Live in the District' campaign includes marketing the advantages of living downtown including proximity to shops and services, thriving events and nightlife and contemporary living spaces.

Figure 37: Resident Attraction, Belleville, ON



Source: https://downtownbelleville.ca/live-in-the-district/

13.2.2 Downtown Kingston: Building up

The Kingston BIA is supporting residential attraction through its advocacy strategy which supports residential intensification in the downtown. The BIA is active in the City's planning meetings and stakeholder consultation efforts. It has produced a series of opinion papers and policy statements on behalf of its members which are shared with city officials and posted on the BIA website.

The BIA's message to city hall is[38]:

- Residential intensification maximizes benefits re: economics, environmental, social, health and wellness etc.
- A high-rise location must be in a full-service commercial district, on a major transit line, in/near a major employment zone, with a high "walkability score".
- Downtown Kingston has the highest walkability scores in the city. Residents are close to restaurants, pubs, services, grocery stores, and a variety of other desirable amenities.
- A densified community encourages more walking, cycling and transit use and high-rise buildings consume less energy, use less water and produce less waste than single family homes.
- More downtown residents will be able to take advantage of the many cultural amenities the city has invested in; Market Square, Artillery Park, The Grand Theatre, The Leon's Centre etc.

13.2.3 Downtown North Bay & Waterfront BIA

The Downtown North Bay & Waterfront BIA promotes the downtown for residential and commercial development. The BIA website promotes the many benefits of living downtown and provides a list of available residential and commercial properties in the downtown[39].

13.2.4 Kicking the tires: Minneapolis, Minnesota

Minneapolis established a downtown development plan that includes an initiative focused on getting people to change their minds about living downtown. The Explore Downtown Living campaign provides weekly downtown tours of residential developments across five neighborhoods of downtown Minneapolis.

Explore Downtown Living is free and lets people tour Downtown Minneapolis and all it has to offer at their own pace. Tour attendees visited residential communities that provide a range of views and experiences in each of downtown's five neighborhoods. They are making the case that downtown Minneapolis has an abundance of activities and conveniences for all stages of life and that living downtown keeps people in close proximity to many entertainment and dining options, jobs, great public transit options and an assortment of outdoor and family activities. Downtown residents also enjoy many grocery, shopping, and medical options at their fingertips. The targets are everyone from Millennials to Baby Boomers.

[38] www.downtownkingston.ca/development/intensification

[39] Additional information is available at https://downtownnorthbay.ca/available-property

The campaign seeks to support the growth of downtown's population and residential development in order to support the council's Downtown 2025 Plan, which calls for doubling downtown's residential population to 70,000 by the year 2025. The Explore Downtown Living has showcased more than 21,000 unit tours in 12 days since its launch in 2015, "helping thousands of people get better acquainted with downtown's thriving and dynamic residential neighbourhoods."

The program is funded by the local downtown development group, the city and private sector sponsors.

Figure 38: Resident Attraction, Minneapolis

Source: https://www.exploredtliving.com/

13.2.5 Cash to move downtown: Tulsa Remote

More than a dozen mid-sized cities in the United States are now offering cash incentives and other incentives to get people to live downtown. The City of Tulsa, Oklahoma is specifically targeting tech workers from across North America through their 'Tusla Remote' campaign (rolled out before the onset of COVID-19).

Tulsa Remote offers:

- $10,000 in cash to help cover the costs of relocating to the city.
- A free space at a coworking space for a period of time.
- Community building programming, events and meetups to help tech professionals network with organizations, local non-profits and individuals that are working to make Tulsa the best it can be.
- Curated housing options to make renting and purchasing of housing as easy as possible.

The initiative is funded by the City of Tulsa and the George Kaiser Family Foundation.
https://tulsaremote.com/

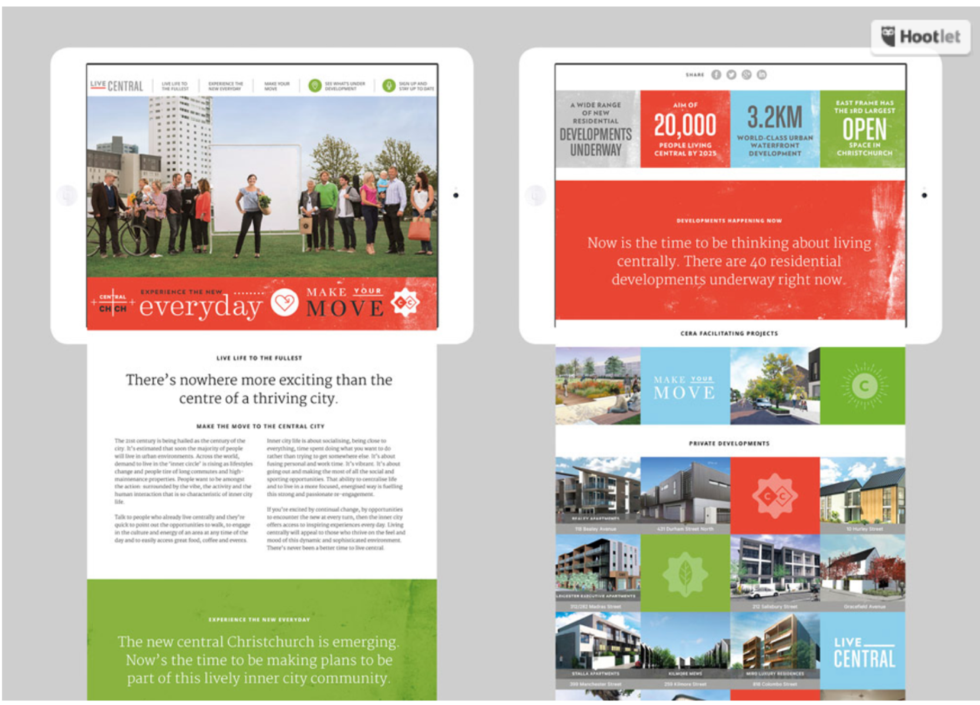
13.2.6 Selling a dream: Christchurch, NZ

Christchurch, New Zealand launched a large scale campaign to attract residential development and population to the downtown following the 2011 earthquakes with devastated the downtown area. The “Live Central” campaign is focused on attracting 20,000 people to live downtown by 2025.

The campaign included a major focus on downtown lifestyle marketing. Target market research found: “all primary audiences saw inner city living as a vehicle for a more active, exciting, and fulfilling life. Campaign success was not focused physical location or central city attractions but about people’s lifestyle aspirations. The rollout strategy was broken down into three parts: ‘sell the dream’, ‘make it real’, 'promote the opportunity’.

A review of the Live Central campaign including brochures and other creative can be found here: https://insightcreative.co.nz/work/cera-live-central

Figure 39: Resident Attraction Christchurch, NZ

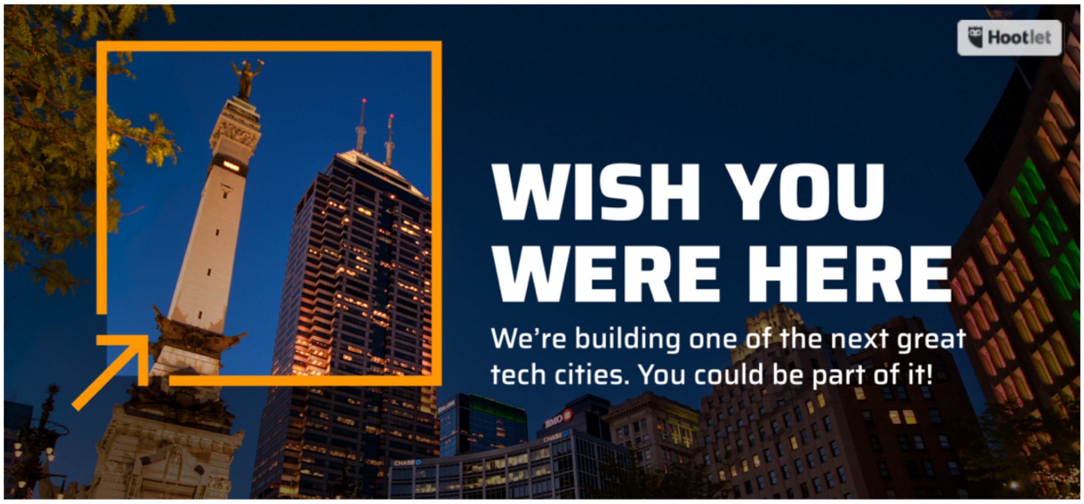


https://insightcreative.co.nz/work/cera-live-central

13.2.7 Enlisting Downtown residents to promote living in the downtown: Indianapolis

In 2019, the City of Indianapolis rolled out a national campaign to attract tech talent to the downtown. The campaign is funded by the city and many of the big tech firms in the region (e.g., Cummins, Eli Lilly and Company, GEICO, Raytheon and Salesforce).

Figure 40: Resident Attraction, Indianapolis



Source: https://techpoint.org/2019/05/wish-you-were-here/

The "Wish You Were Here" campaign includes a "Red Carpet Experience" to help attract talent to Indiana and meet with the fast-growing startups, scale-ups and enterprise companies that have jobs to fill.

To help promote the campaign, local tech workers are encouraged to sell the idea to their friends in other cities. Tech workers are asked to:

1. Think about who you want back home. No coders in your contact list? That's OK. Tech companies need lots of people – tech workers, sure, but also people in marketing, finance and other roles.
2. Send your out-of-staters a text, post, email or call and tell them about our campaign.
3. Encourage them to apply for our Red Carpet Experience at www.techpoint.org/here

Additional information on the initiative is available at: https://www.downtownindy.org/blog/indy-needs-you/

14 Crime and Graffiti

Edmonton, Winnipeg, Ottawa, and Kitchener provide excellent examples of collaborative partnership-based strategies for addressing crime and safety issues common to many Canadian downtowns.

14.1 Crime prevention through Design, Edmonton, AB

In Edmonton, the Downtown Business Association's (DBA) Business Recruitment Committee (BRC) works with the City and other partners to identify and implement initiatives that will help make the Downtown safer. Examples include increased policing and community foot patrols, the application of crime prevention through design (CPTED) process and techniques to the planning review of new developments, community communication strategies and social programs. The DBA recently made a $10,000 donation to a City-led program called Downtown Proud to resurrect the litter removal program and employ 5 people. The program was refined to add more routes and garbage collections services in the hours following events at Rogers Place.

The DBA also has an Operations Committee (OC) that works extensively with various departments of the City of Edmonton and members of the business community regarding infrastructure, safety and security issues. The objectives of the Committee include proactive projects and monitoring in the areas of Downtown beautification, maintenance, safety, security and operational matters in both public and private sectors.

The Committee assisted the production of a panhandling pamphlet to provide tips and resource to help busines owners and their employees respond appropriately to the issue. The Committee helped raise money to support the opening of the Mackay Avenue Playground, Downtown Edmonton's first community playground. The playground was an initiative of the Edmonton Police Service, the DBA and several community organizations to help ensure that the Downtown is inviting and inclusive.

The Committee also meets with Edmonton Police, and other stakeholders to identify possible immediate and long-term solutions to problems associated with increased gang activities in several parts of the Downtown[40].

14.2 Downtown Community Safety Partnership, Winnipeg, MB

In Winnipeg, the Downtown BIZ worked with the Province of Manitoba, City of Winnipeg, Winnipeg Fire Paramedic Service, Winnipeg Police Service, and True North Sports & Entertainment to form the Downtown Community Safety Partnership (DCSP) in 2020.

The DCSP builds on the already established programs (e.g. Community Ambassadors, the Downtown Watch team [now called CONNECT], the Community Homelessness Assistance Team [now called Community Outreach Advocacy Resource or COAR] with the addition of new 24/7 team called Mobile Assist and Connect (MAC247). All teams have uniforms designed to be recognizable on the street and reflect a friendly and welcoming presence. DCSP is expected to lead to important enhancements including additional training, improved coordination with other downtown outreach agencies, increased visible presence on the street and improved coverage for BIZ members. This evolution means a greater presence of highly trained teams and increased support for those experiencing complex issues in Winnipeg's core. The DCSP model is designed to develop based on collaboration, evaluation and research and deliver data-driven results[41].

There is also a Downtown Winnipeg BIZ Enviro Team that works 7 days a week to clean and beautify downtown streets, sidewalks, storefronts and public spaces. The Province of Manitoba provides additional funding to hire students in the summer months. The Enviro Team keeps detailed statistics on their activities.

[40] Additional information is available at https://www.edmontondowntown.com/downtown-business-association/

[41] Further information is available at https://downtownwinnipegbiz.com.

In the period January 1, 2020 to October 1, 2020, the 2020 Annual Report cites the following statistics:

- 79,264 pails* of litter picked by hand.
- 3,812 graffiti tags* removed.
- 2,646 sidewalks* ploughed.
- 630 posters* removed.
- 6,932 transit shelters* cleaned.
- 84 hanging flower baskets* installed.

14.3 Street Ambassadors and Outreach, Ottawa, ON

The Downtown Rideau BIA in Ottawa runs several complementary programs. The Downtown Rideau Street Ambassador Program is an integral part of providing a welcoming experience in "Ottawa's Arts, Fashion & Theatre District." The Ambassadors provide a street presence monitoring and reporting public disorder for response place calls for service response to the city, police, and outreach services. They also provide on-street customer service and information on BIA member offerings and services and assist the public with tourism inquiries, directions and information on businesses and services in Downtown Rideau. The Ambassadors program is operated in partnership with Centre 454 of the Anglican Social Services.

Figure 41: Downtown Rideau Street Ambassadors

Source: https://www.downtownrideau.com/

The complementary Downtown Rideau Street Outreach Program provides early intervention to individuals in crisis by engaging them on street with support and providing businesses with an alternative to calling police or 911 for assistance.

The Downtown Rideau Street Detail is tasked with on-street public space maintenance (eg. pick up litter, tidy street furniture, remove posters from lampposts and surfaces, and empty waste receptacles) and reporting resources to augment basic city services. The BIA is responsible for program development, hiring, implementation, communications, training, managing personnel, reporting and evaluation. Staffing resources include: Ottawa-Carleton Association for Persons with Developmental Disabilities, and Canada Summer Jobs.

The BIA conducts annual safety and lighting audits to help identify opportunities to improve safety in the area, which includes lighting, hazards and entrapment concerns. An innovative idea connected with the audits has been the installation of programming infrastructure called (FX Poles) to provide music and street theatre performance opportunities in high pedestrian traffic areas and to discourage loitering and negative social behaviour[42].

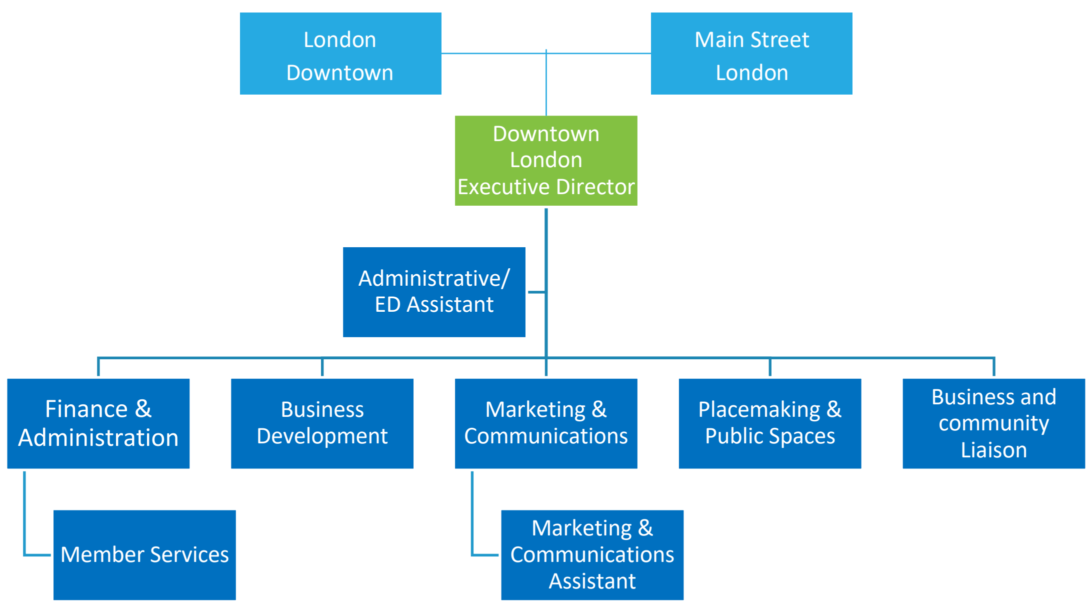
14.4 Messaging Apps in Kitchener, ON

The Downtown Kitchener BIA together the Waterloo Region Police Service, and City of Kitchener Bylaw + Security have developed a Slack App for sharing information that could lead to crime prevention in the downtown core. The focus of the program is to encourage greater communication, reduce negative impacts in Downtown Kitchener, and facilitate social supports. The app is free to download and provides participating businesses with access from either their mobile device or desktop.

15 Governance review – MSL & LDBA

Downtown London is made up of two complementary non-profit organizations. The London Downtown Business Association (LDBA), with 13 board members, is responsible for the finances and operations of the business improvement area. MainStreet London (MSL), with 11 board members, is a separate non-profit corporation that administers grants and loans providing incentives for members that could not legally be provided by the LDBA.

Figure 42: Downtown London Structure



[42] Additional information is available at https://www.downtownrideau.com

Both organizations have boards that provide oversight for the administration of their respective programs and services. The LDBA board members are all levy-paying members of the business improvement area. The MSL board consists of key stakeholders in the downtown area, including a representative from the City of London, the London Economic Development Corporation, non-levy paying anchor businesses (e.g. RBC Place, Budweiser Gardens, Covent Garden Market, the Grand Theatre and the public library) and other key stakeholders.

Table 16: LDBA and MSL Responsibilities

London Downtown Business Association	MainStreet London
• Finance, administration & member services • Investment attraction & retention • Marketing & communications • Placemaking & community liaison • Business & community liaison	• Investment incentives (grants & loans)

MainStreet London was initially established and funded by City of London. Funding for the organization now comes from LDBA. Main Street London was established to provide funding that could not be provided by the LDBA due to Municipal Act guidelines that prohibit bonusing. In 2020 MainStreet funding was revamped for 2020 to support businesses impacted by the COVID-19 pandemic for marketing, PPE and other adaptations. (see appendix)

The Downtown London Executive Director reports to both boards. All other staff are employees of the LDBA.

In a review of governance best practices, outlined earlier in this report, the consulting team was not able to find any examples of a similar governance model to that of Downtown London. Communities such as Brandon, Manitoba and Winnipeg, Manitoba have downtown development corporations that complement the work undertaken by the downtown BIAs (or BIZs or BIDs as appropriate).

In Winnipeg's case, CentreVenture Development Corporation's is described as follows:

> "Established in 1999, CentreVenture Development Corporation is an arms-length agency of the City of Winnipeg, whose mandate is to provide leadership in the planning, development, coordination, and implementation of projects and activities in the downtown.
>
> CentreVenture's staff, under the guidance of a volunteer, private-sector board of directors, develops and implements strategies to identify and capitalize on economic development opportunities in Winnipeg's downtown.
>
> CentreVenture expedites development in Winnipeg's downtown by supporting private-public cooperation and innovative partnerships. The Corporation encourages new retail,

> entertainment, housing and commercial ventures, along with public sector investment in public spaces, amenities and services."[43]

Brampton, Ontario's Downtown Development Corporation was established in 2006 as a public-private partnership formed with a mandate to attract and retain business and investment to downtown. However, following a study commissioned by City Council, the corporation was disbanded in 2015 and replaced with a BIA. The reasons for the decision are unclear, but media reports suggest that some people felt the corporation did not have the legislative tools required to make a meaningful difference while other people felt that the corporation was not being managed in a fashion that was appropriate for a public-private partnership.

A preliminary review of the advantages and disadvantages of the current two-board governance structure is outlined in Table 17. Further analysis will be completed through the stakeholder engagement in phase two of this project.

Table 17: Advantages and Disadvantages of Downtown London's Current Governance Structure

Advantages of current governance structure	Disadvantages of current governance structure
• MainStreet London provides funding for businesses in Downtown area while satisfying Municipal Act guidelines • The current structure reduces potential for conflicts of interest because business funding applications are not evaluated by competing businesses, • The current structure engages stakeholders with expertise and influence in the downtown London economy while ensuring members are responsible for the oversight of the BIA operations.	• Some levy paying members are unhappy that non-levy paying members make funding decisions on their behalf • Main Street London board members' connection with the overall BIA is limited. There is potential for a disconnect between LDBA and MSL visions for the downtown. • Increased administrative burden for Executive Director reporting to two boards • The two-board system is confusing for members and external stakeholders alike

[43] https://www.centreventure.com/about

16 Data Sources and Methodology for BIAs

16.1 Types of relevant data

Data collection and analysis is a very important role for the Downtown London BIA. Having good data on the economy, population and other trends helps effective profile the downtown and assess trends. Having good data related to the outcomes of BIA activities helps ensure the effectiveness of the organization and that it is achieving its mission. There are three basic categories of relevant data:

1. **Data related to the *activities* of the BIA**. Informs board, funders and stakeholders on the activities of the BIA (marketing, support services, advocacy, etc.)
2. **Data related to *outcomes* related to specific BIA initiatives**. Informs the board, funders and stakeholders on the success of specific BIA initiatives.
3. **Macro-level data on the economic, environmental, and social health and trends in the downtown**. Ensures the board, funders and stakeholders are aware of key trends that help inform the strategy and tactics of the BIA and partner organizations in the downtown.

Ideally, BIA activities lead to effective outcomes that positively influence the macro-level outcomes in the downtown.

The Downtown London BIA is working to ensure the downtown remains a thriving centre for commerce, entertainment and living within the City of London. What should the BIA be measuring to determine if the downtown is progressing and if initiatives undertaken by the BIA specifically are having the intended results? There are basically three sources of data the BIA should collect on a periodic basis (frequency is discussed below):

1. General economic and demographic information on the BIA area

   This information helps the organization and its partners/stakeholders understand key trends in the downtown. This information can be used for promotional purposes (e.g. building permits are up 50%) and to help inform and support the activities of the BIA. This data is not a direct reflection of the success of the work of the BIA but it should be aligned with the work of the BIA.

2. Information on the BIA members

   The members pay the taxes that are used to fund the BIA's activities and it is important to track and understand key trends related to their activities in the downtown.

3. Information specific to initiatives undertaken by the BIA

   This is important for two reasons. First, it helps the BIA understand if its activities are helping to meet its mission and objectives and address key challenges and opportunities in the downtown. Without good information, it is very difficult to assess success. Second, tracking specific initiatives helps calibrate the efforts of the BIA. Without information on what is or isn't effective, it is hard to know if the BIA is making a difference.

DOWNTOWN LONDON RE-IMAGINED

Other considerations:

- **Comparative analyses**

  Data on its own doesn't provide much value. Knowing the downtown population increased by 1% last year without context is not that helpful. If the downtown population increases by 1% while the city or CMA population increased by three times that amount, then the growth rate probably should be questioned. If it increased by 1% and the population in the city overall declined that provides a much different context.

  Ideally, downtown data collected would be compared to historical data (e.g. 1% growth this year, 3% last year and 4% the year before) and to at least the city overall (e.g. downtown is home to 63% of the CMA's total IT employment). For certain datasets it would be valuable to compare to other downtowns (comparators) but it can be challenging to gather apples-to-apples data on the various downtowns.

- **Frequency**

  For most data sets, an annual review is an acceptable frequency. In certain cases, data that is available monthly or quarterly should be shared with stakeholders assuming the effort to collect and analyze the data is limited. There are some datasets that only become available periodically (such as the five-year Census). It is important for the BIA to analyze this data as it becomes available.

- **Return on Investment (ROI) on data collection/analysis**

  One of the most important concepts when considering what and when to measure it the concept of return on investment (ROI). In this context the ROI is an estimation of the relative benefit of collecting data to the cost of its collection. For example, the BIA would benefit from a comprehensive annual survey of all members to determine revenue, customers, employment, investment and other metrics. However, there are somewhere in the range of 700 individual businesses in the downtown not including those who are self-employed and working out of their residences. The effort and cost required to track the full universe of businesses in the downtown needs to be weighed against the benefit compared to a proxy for similar data such as using Statistics Canada business location counts.

  It would be valuable to have a precise count of how many people actually come to the downtown each year to shop, eat or engage in recreation. The effort and cost required to track the full universe of traffic downtown needs to be weighed against the benefit compared to a proxy for similar data such as Environics.

  It would be nice to have a complete analysis of all the restaurants in the downtown including sales, demographics of customers, etc. but the effort and cost required to track the full universe of people who eat in downtown restaurants needs to be weighed against the benefit compared to a proxy for similar data such as Environics.

16.2 Sources of data[44]:

Statistics Canada: The country's statistics agency publishes a considerable amount of data on a regular basis related to cities, counties and urban centres (CMAs, CAs). It does not provide the same level of detail at a more granular level such as a Census Tract (CT) or Dissemination Area (DA) which would relate to the downtown area.

Every five years Statistics Canada conducts a comprehensive Census. and this data is available for an area similar to that covered by the BIA. Release of the detailed 2021 Census data will begin in 2022 and it would be a very good idea for the BIA to conduct a detailed review of the Census specific to the downtown at that time.

Business locations counts data is also available at the Census Tract level. The business location counts are developed using CRA tax filing and other data sources. This data set provides a detailed taxonomy of the business establishments in the Census Tracts by detailed industry (six-digit NAICS[45]) and by employment level (non-employer, 1-4 employees, etc.). There are three Census Tracts that approximately conform to the London Downtown Business Association geographic boundaries. This data can be an important tool to understand trends in the industrial profile of the downtown over time. It can also show the relative concentration of city or CMA firms and employment in the downtown. The data is published twice a year for a fee.

Secondary data providers (Environics, etc.): There are firms that provide detailed economic and demographic data on the area covered by the BIA. For many datasets the firms use Statistics Canada Census data supplemented by their own analysis between Census periods. Environics provides a wide range of data on the firms in the downtown, commercial activity, population, visitors, etc. The City of London has a license for Environics data and has agreed to provide specific data for the downtown through this license.

City of London administrative datasets: Tracking functions like business licenses and permits are an important source of data on the downtown. The information is gathered by government administration and may be subject to data privacy considerations.

Local primary data gathering: For specific downtown information, primary data gathering where surveyors document vacancies, space sizes, and business mixes storefront by storefront in a neighbourhood can offer insights of detailed local business conditions. These types of surveys can be time and resource intensive to conduct but are often more timely and customizable than administrative datasets.

Crowdsourcing: Some datasets are gathered through mass appeals for responses to Web-based surveys from certain populations (crowdsourcing). This data can be timely and relatively affordable to gather but results may be biased to certain groups that are more likely to respond to the survey.

Mobile location data: This is an emerging source for more precise data on the downtown. Credit card transactions, mobile location data, and transportation counts are just a few of the datasets that

[44] Derived using multiple sources including the Canadian Urban Institute, OMAFRA, Ontario BIA Association, and the International Downtown Association.
[45] North American Industry Classification System

are being made available by firms such as Mastercard and Google. This data can be costly to purchase and difficult to analyze.

16.3 Using Data: Examples from the OMAFRA Downtown Revitalization Manual

Business Mix and Location Analysis

The Business Mix and Location Analysis incorporates two different components:

1. Commercial Structure Analysis – businesses are classified based on consumer behaviour;
2. Location Analysis - analyzes the locations of business types in the community.

This data is collected primarily through direct surveys of businesses in the downtown.

Customer Origin Survey and Trade Area Analysis

A Customer Origin Survey can be used to develop a good picture of the trade area for the downtown. Traditionally this data is gathered by a customer origin survey filled out by visitors to the downtown. The emergence of mobile location data (particularly credit card data) should provide a more comprehensive picture of customer origins as that data is tracked to the home addresses of the credit card customers. Further, secondary data providers such as Environics provide data on customer segmentation and trade areas using their own surveys and other data.

Market Threshold Analysis

A market threshold analysis assesses whether a community has enough businesses to meet local demand. For example, if there are three dentists per 1,000 households across Canada and only one dentist per 1,000 households in a specific community, the first level analysis would suggest there is demand for more dentists.

The most efficient way to conduct market threshold analysis is with Statistics Canada business location counts data. Statistics Canada provides business counts for over 900 detailed industries including private sector, public sector and the not-for-profit sector, a quick analysis of potential gaps (and clusters of activity) can be developed by adjusting this data for population size. A community can also determine if there is 'leakage' to other adjacent municipalities Using business count data.

Some communities use surveys to gather information on what services residents leave the community to access. If 40% of survey respondents leave the community to purchase vehicles, that is an indication of a potential business attraction project for the community.

Market threshold analysis is different for downtown areas. First, the analysis should consider the local population living in the downtown and determine if there are gaps in the provision of services to the downtown population (i.e. what services do they leave the downtown to access?). If there are gaps, an effort can be made to attract those services to the downtown.

Second, the analysis should consider what clusters of business activity could be enhanced in the downtown – not based on the local population but on the downtown's ability to draw in residents and visitors. This activity could include entertainment, recreation, post-secondary education, etc.

16.4 Downtown Metrics by Type

Table 18 shows a full list of potential metrics that could be used to support downtown planning and initiatives.

Table 18: Downtown metrics by category and source

Category:	Metric:	Source (s):
General economic and demographic indicators	• Business mix by sector and size • Employment by industry and occupation • Growth in total employment • Growth in commercial activity • Real estate transactions • Commercial vacancy rates • Office vacancy rates • Downtown resident demographics • Percentage population growth in downtown • Household income and trends (incl. low income) • Municipal tax base (changes over time) • Educational institutions and students	• Statistics Canada • City Hall • Third party data providers (Environics, etc.)
Investment in the downtown	• Downtown land uses • Construction activity in the downtown • Building permit values • Municipal capital investment in downtown • institutional development • Commercial and residential assessment • Dwelling growth in the downtown	• City Hall
Relative impact of the downtown	• Downtown as proportion of city land area • Downtown as proportion of population • Downtown as proportion of office, housing, retail and open space • Downtown as proportion of jobs • Downtown as proportion of tax revenue • Downtown as proportion of assessment value • Downtown office space as a % of citywide inventory	• Statistics Canada • City Hall
Livability measures	• Population growth (changes over time) • Migration (domestic and international migration) • Housing (types and household sizes) • Cost of housing/renting • Safety (crime rates) • Car parking spaces • Public transportation • Access to services downtown (e.g. full service grocery stores) • Resident attitudes	• Statistics Canada • City Hall • Primary surveys • Secondary data sources

Category:	Metric:	Source (s):
City investment in the downtown	• Number and value of capital projects in the downtown as proportion of total capital budget.	• City Hall
Downtown as gathering place	• Tourist/visitor counts • Vehicular counts • Activities/events/festivals • Parking spaces • Activity counts (restaurants, hotels, etc.)	• Venue-specific statistics • Primary surveys • Secondary data providers (e.g. Environics • City Hall
BIA impact metrics	**Operational metrics:** • BIA levy - % of assessment • Operating budget – adjusted for size • BIA employment **Impact metrics:** • CIP incentive programs • Facade improvement and other loan programs • Other incentive programs • Advocacy initiatives • Housing/residential development initiatives • Marketing and promotion initiatives • Streetscape conditions • Beautification initiatives (artwork, flowers, storefront, etc.) • Open spaces (parks, plazas) • Enhanced sanitation services (trash management, graffiti, vandalism) • Decorations/lighting for seasonal purposes • Enhanced security services • Transportation and mobility initiatives (cycling, pedestrian, parking) • Targeted population initiatives (students, downtown workers, tourists, etc.) • Commercial mix evolution (retail, commercial, office, residential) • Businesses turnover rates • BIA office vacancy rates • Customer surveys • Pedestrian counts • Media coverage • Members' feedback	• BIA collected • Primary surveys • City Hall

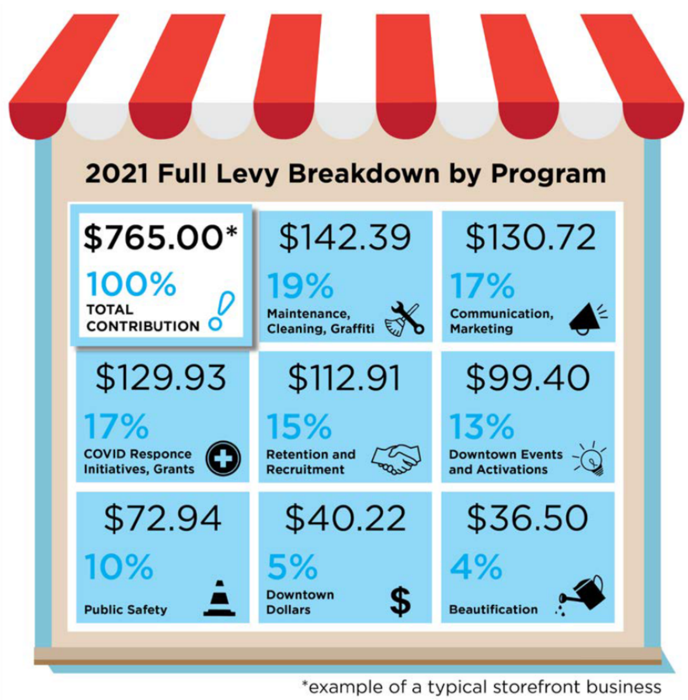
The City of London's State of the Downtown Report is a strong and data rich report. Currently the report provides data on the City's Official Plan downtown boundary, not the LDBA area. The LDBA geographic area is twice the area as the Official Plan downtown boundary. Working with the City to develop an annual set of broad economic and demographic metrics would assist the City and LDBA to monitor the activity and measure the impacts of their combined efforts to support this area.

This analysis could include:

- Economic and demographic trends in the downtown.
- New investment in the downtown (commercial, retail, residential, office, city hall, etc.)
- Activity in the downtown – visitors/tourists, events, etc.
- City and BIA initiatives to address strategic priorities in the downtown.

Additionally, the LDBA needs track and report on the impact of its initiatives on an annual basis. Figure 43 was developed for LDBA's 2020 Annual General Meeting to inform stakeholders of the program focus.

Figure 43: How the Downtown London BIA levy is spent by program area



Source: Downtown London AGM (2020).

17 Appendix

17.1 Document Review

17.1.1 London Economic Development Corporation: London's community Economic Road Map

5 strategic priorities including one specifically targeting the downtown

An exceptional downtown and vibrant urban environment:

- Implementation of 4 related strategies: the Downtown Master Plan, Cultural Prosperity Plan, Strengthening Neighbourhoods Strategy and resources of the City's Housing strategy.
- Includes recommendations to work with property owners to update the state of properties in the downtown
- Investment in public spaces, public art and culture.
- Further references to the tourism development including supporting tourism related businesses

More recently LEDC has added Film/TV production to its target sectors.

17.1.2 RBC Place London COVID-19 Strategic Directions, July 2020

The RBC Place, formerly known as the London Convention Centre, established the following strategic directions in response to the pandemic. The organization's revised vision is: Venue of choice in Southwest Ontario for knowledge transfer and social engagement.

RBC Place divided the pandemic response into three phases: prepare, add value and launch the next normal.

Prepare: includes exploring alternative uses, instill confidence and trust and identifying revenue generation opportunities.

Add value: includes food and beverage delivery, reinforcing the mission and economic value and addressing human resource retention.

Launch the next normal: provide client with unique experience propositions, launch a market strategy to build confidence and trust and explore technological innovation and interactive engagement.

The RBC Place updated strategic directions document states that the pandemic demonstrated the centre's sensitivity to economic conditions. Of particular relevance to Downtown London, the document recognizes the centre's role as an anchor for the revitalization of the eastern downtown.

17.1.3 City of London 2020-2023 Business Plan

The economic development component of the City's business plan recognizes the roles of the London Economic Development Corporation, the small business centre and the Tech Alliance.

Who we are
"These City services work in our community to improve the economic wellbeing of Londoners through the attraction of new companies, growth of existing business as well as entrepreneurship support activities. This is mainly provided through purchase service agreements which include: London Economic Development Corporation, London Small Business Centre and TechAlliance. This grouping also captures contributions to the Economic Development Reserve Fund and the Municipal Accommodation Tax which supports various capital projects."

What we do
"The service strives to accelerate sha sustain the growth of a strong and vibrant economy and foster private sector investment in the City. Organizations provide support and expertise to facilitate the creation of new jobs and attraction of new investment in London that lead to economic growth and overall wealth creation in the London region."

17.1.4 Downtown London Annual General Meeting 2020

Member priorities as outlined in the annual general meeting presentation include financial support, business retention and resilience, safety (crime and social issues), attracting people to the downtown and removing barriers to business.

Financial supports include the COVID-19 response fund, contingency fund and a 2% levy reduction

COVID grants were provided for marketing resiliency, restarting and a mural program.

Business retention and resiliency included webinars, sourcing grants, insider emails, a marketing campaign, member outreach and construction mitigation efforts.

Member management including establishing the Salesforce CRM, member issue tracking and newsletters.

Business recruitment – Downtown London welcomed 23 new businesses and 2 business expansions.

Construction support: Downtown London developed a member toolkit, hosted webinars and received $51,000 in City funding.

Public safety efforts included a town hall, weekly public safety meetings and participation in the Mayor's Task Force for Economic Recovery and the London Community Recovery Network along with a dedicated staff resource

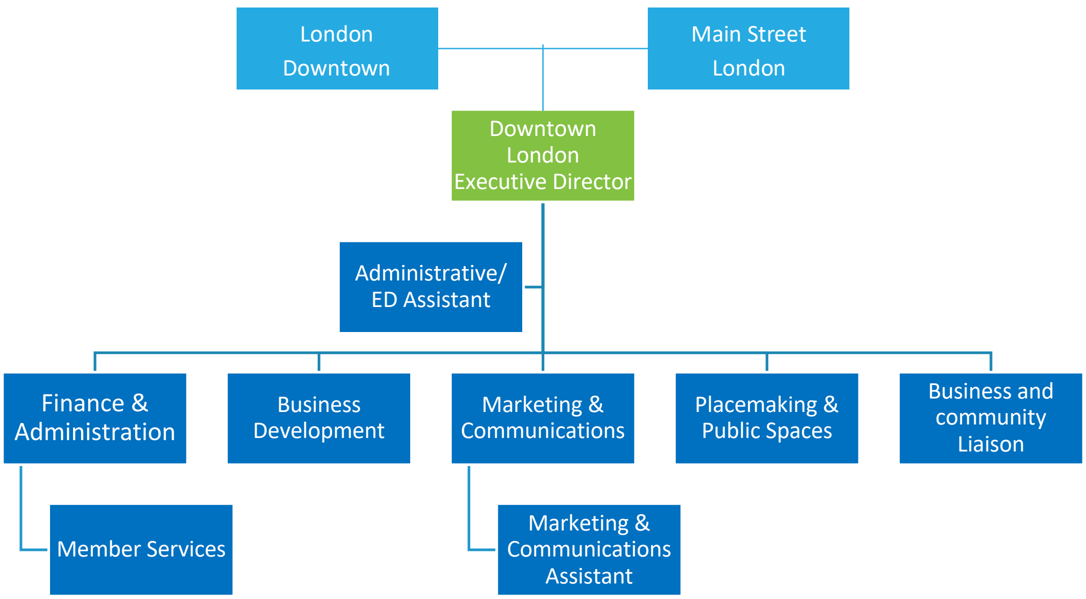
Street vibrancy efforts included a clean team, beautification, music performances, activation and car-free Dundas place weekends.

Marketing & Engagement included incentivizing for local and downtown businesses (small is the new mall), promoting new business models and sharing good news stories of LDBA members

The New Downtown London website includes a searchable busines directory, interactive map showing parking and transit options, member resources and online sales of Downtown dollars.

Removing barriers included allowing curbside and delivery parking and free 2-hour parking, patio permit exemptions, advocating for members needs and leadership roles in the Business to Business program, London Community Recovery Network and the Downtown and Core Area table.

17.1.5 Downtown London Board & Executive Director/Staff Responsibilities and 2021 Job Descriptions



Downtown London has nine staff members including the Executive Director. The Executive Director reports to two boards; the London Downtown Business Association and Main Street London.

Downtown London's mission is to steward the levy paid by member businesses by leading and championing programs and investments that make London's downtown a destination of choice and an economic centre that supports the entire community.

The London Downtown Business Association board and Main Street London Board are responsible for establishing Downtown London's goals direction, limitations, fiduciary, and accountability frameworks. Downtown London Executive Director provides the operational framework and management of the organization.

This report outlines the distinct responsibilities for the board and Downtown London staff for strategic planning, operational oversight, budget, purchases, operational expenses, employee recruitment, board recruitment, employee work plans and assignment, human resource policies, employee compensation, employee evaluations, board member and volunteer nominations and evaluations, policies and procedures, public and media relations, board committees, task force teams, board meetings and annual general meetings.

17.1.6 London Recovery Network Recovery Initiatives

This document outlines the recovery efforts of the London Community Recovery Network. This summary includes the recovery initiatives specific to Downtown London.

- Regular update meetings with downtown businesses
- Business recruitment, retention, and expansion efforts
- New marketing campaigns (e.g. Small is the new mall)
- Activations and place making; patios, socially distanced performances, Dundas Place weekend openings, car free weekends
- Social/public safety, safety survey, safety audit, incident follow-up
- Advocacy – identify opportunities, issues & solutions
- Reallocated $500,000 to $790,000 to recovery grants for PPE, marketing, murals, marketing activation, Digital Mainstreet promotion and consultation

17.1.7 London Economic Development Corporation (LEDC): London's Community Economic Road Map 2015-2020

This five-year strategic plan is currently under review.

LEDC priorities area as follows:

- A city for entrepreneurs
- A supportive business environment
- An exceptional downtown and vibrant urban environment
- A top-quality workforce
- A national centre of excellence for medical innovation and commercialization.

Under the supportive business environment, the plan identifies four core industry sectors: manufacturing, digital creative, food processing and life sciences. Digital creative is a prime target for downtown business and investment.

Specific actions under the Exceptional Downtown Pillar include the following:

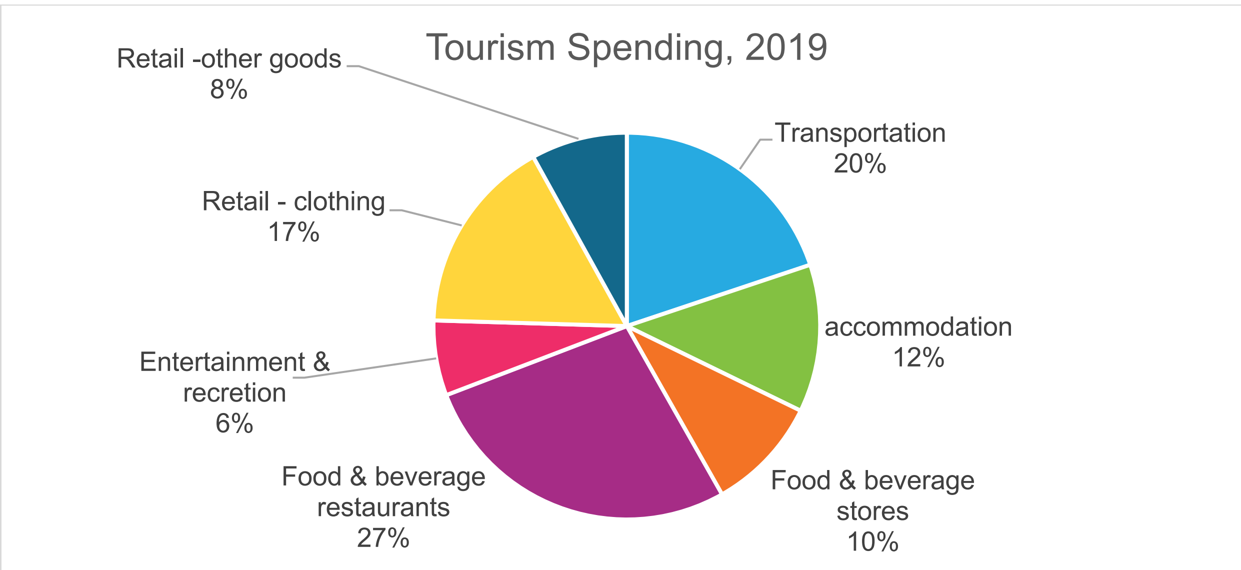
- Improve the urban environment
  - Implementation of the downtown Master Plan
  - Implementation of the Cultural Prosperity Plan
  - Implementation of the Strengthening Neighbourhoods Strategy
  - Implementation and resources of the City's Housing Strategy
- Vibrant attractive downtown
  - Engage property owners to upgrade/enhance the state of properties in the downtown
  - Ensure the use of development incentives to attract needed investment as it relates to the City's Community Improvement Plan
- Enable a variety of cultural, sporting and entertainment events and activities

- Animate the downtown with public spaces, public art, culture, formal and informal programming for a wide range of age groups and population segments
- Promote the range of cultural institutions and entertainment offerings, events and programs
- Support the economic sustainability of individual tourism and hospitality businesses

17.1.8 Tourism London Economic Impact Analysis

This analysis by the Conference Board of Canada estimates visitor spending in London in 2019 at $823 million with an estimated 2.13 million overnight visitors. The large majority (89.7%) of visitors were from Canada.

Of the $823 million tourism spend, the largest share is spent on food & beverage at restaurants (27.4%), 16.5% of the total or $135 million is retail spending and 12.3% for accommodation.



Adapted from Economic Impact Analysis of Tourism in the City of London, Conference Board of Canada, September 2020

17.1.9 Tourism London Marketing Strategy Opportunities by Audience

The marketing strategy prepared in June 2017 provides an analysis of three tourism audiences: millennial travellers, Gen x/ family travellers and boomer travellers. The marketing plan provides some details on the targets' key drivers, tourism offering opportunities and most appropriate marketing channels. The opportunities that align with Downtown London's offerings include culinary packages with speciality food offerings (vegan, organic and local), discovery unique and authentic neighbourhoods, vintage/thrift/shopping excursions, summer festivals, culinary and theatre packages and learning tours/opportunities such as Museum London and Jill's Table (a cooking products and teaching business).

17.1.10 The 8-Step process for Leading Change – Dr. Kotter

The 8-step process for Leading Change outlines the following process as follows:

1. Create a sense of urgency
2. Build a guiding coalition
3. Form a strategi vision and initiatives
4. Enlist a volunteer army
5. Enable action by removing barriers
6. Generate short-term wins
7. Sustain acceleration
8. Institute change

17.1.11 LDBA and MainStreet London History

The history of the LDBA and Main Street London has evolved significantly since the establishment of the LDBA in 1993. In 1998, some 23 years ago, the City contributed $100,000 annually to the Main Street London Downtown Revitalization organization. The funding was halved in 2011 and then completely removed in 2012. Main Street London was established in 1998 and by 2009 the organizations were merged to oversee the Downtown London brand (established in 2010), to avoid duplication and create efficiencies.

The BIA boundary was expanded north and west including Richmond Row and the member levies were reviewed and amended in 2015. In 2019 the MainStreet London completed a review of its mandate and in 2021 all functions were moved to the LDBA with the exception of the MainStreet London grant program.

Year	London Downtown Business Association (LDBA/BIA)	MAINSTREET LONDON (MSL)
1993	• LDBA BIA established (previously an association). • Various staff roles; focus on Marketing, Events & Promos, Cleaning, Beautification	N/A
1998	• City Council approved the Downtown Millennium Plan. • The city proposed a matching partnership ($100,000 each) with LDBA to create MSL Downtown Revitalization Organization	MSL volunteer Working Group created to: • Help rebuild the tax base • Create a more vibrant district to attract investment and consumers • Strengthen businesses through education and support, start-up and expansion mentoring • Produce visible improvements to storefronts (design consults, About Face grant, and CIP incentives) • Vacant space improvements and promo

Year	London Downtown Business Association (LDBA/BIA)	MAINSTREET LONDON (MSL)
2000	• LDBA Operations Manager (1 staff) worked with LDBA board (bookkeeping, board minutes, graffiti removal program) • Separate BIA and MSL budgets per KPMG advice	• MainStreet London Downtown Revitalization Organization incorporated. With a four point approach (design, promotion (marketing), organization and economic restructuring) • Manager hired. Later Deputy Manager hired (2 staff). • Volunteer committees struck: Design, Economic Restructuring, Organization, Marketing (MSL only, 4-point approach) • About Face Grants program created (BIA prohibited from paying grants to members)
2007	• LDBA requested MSL staff (1 manager and 1 staff) take over, expand BIA programming. • Focus on Marketing, Beautification, Event Sponsorships, etc.	• All staff moved into MSL, including 1 BIA role (a hybrid BIA) • BIA and MSL programs operated by staff. • Focus on Recruitment, Retention and Member Education; About Face Façade Grants (BIA not permitted to offer grants)
2009	• LDBA and MSL boards merged to avoid duplication (same discussions at both board meetings; BIA wanted input to MSL). Created efficiencies (e.g. staff time, faster decision making)	
2010	• Downtown London (DTL) re-brand of BIA+MSL to address role confusion. Same staff operating programs of both organizations (see 2007)	
2011	• The City of London cut back MSL funding to $53,000 due to budget cuts at the City (zero Increase budget mandate)	
2012	• The City of London pulled funding entirely for MSL due to budget constraints, need to support other new BIAs.	
2015	• BIA Expansion north and west; includes Richmond Row; rebalanced levies evenly across the entire district.	
2019	• Governance Review Task Force struck to address member concerns; recommendations made; requested review of MSL mandate, as the sole funder.	
2020	• Existing programs ran in modified formats due to COVID-19 restrictions.	About Face grant program suspended, other than existing pledges. Funding redirected to COVID-19 recovery grants
2021	• At the request of the board, all functions other than grant programs moved to the LDBA budget.	MSL focus realigned to grants only.

17.1.12 Core Area Action Plan 2019

The Core Area includes the Downton London, Old East and Midtown and encompasses most of the Downtown London and the Old East Village Business Improvement Areas (BIA). Note: Midtown is not a BIA and does not receive any tax levy. Many of the 69 recommendations from the plan have been delayed due to COVID and staffing gaps at the City of London.

London's Core Area was thriving until about the 1970s. Like most cities across North America, London's Core Area declined throughout the following decades as everyday commercial uses spread into the suburbs, residential neighbourhoods grew strong outside the core, and congestion, urban decay and disinvestment made the Core Area less attractive to many Londoners.

Feedback from consultations:

- People struggling with homelessness and health issues need help.
- People need to feel safe and secure.
- Businesses need an environment that allows them to be successful.
- The Core Area needs to attract more people.

There is a Coordinated Informed Response Pilot Program put in place in 2018. Between April and August 2019 (the time of the report's publication), The program made 284 referrals to emergency shelters, 177 referrals to food services, 703 referrals to housing services, 37 referrals to health services among other activities.

At the root of the Action Plan is a vision for the Core Area to be a place that:

- Signals our city's economic vibrancy and attraction;
- Helps us to attract and retain talent and investment;
- Tells the story of who we are as a city;
- Serves as a canvas for culture, arts, music and entertainment;
- Is safe, secure and welcoming for a broad diversity of people;
- Offers strong local and tourist attractions;
- Provides opportunity for business success;
- Offers compassionate care for those who need it;
- Is buzzing with activity at all times of the day and night; and,
- People can proudly identify as their home and neighbourhood.

Short term actions:

- Strengthen delivery of Coordinated Informed Response Program
- Implement Housing Stability Week pilot project
- Implement early-morning Coordinated Informed Response Program
- Implement breakfast Coordinated Informed Response Program
- Establish Headlease Program (city co-signs leases for targeted populations)
- Double foot patrol officers in Core Area for a discrete period of time
- Create new Spotlight Program (raise awareness of security cameras)

- Enhance Service London Portal to allow for complaints, concerns, and enquiries on Core Area issues
- Install kindness meters to directly support Core Area social service agencies (don't contribute to panhandlers but give to specific charities)
- Stage police command vehicle in strategic locations
- Issue request for proposals on Queens Avenue parking lot
- Explore new ways to support Core Area property owners to dispose of
- found syringes
- Conduct three-week Core Area By-law Enforcement blitz
- Prioritize Core Area building and sign permits
- Streamline event processes
- Provide incentives for installing uplighting on privately-owned
- Buildings
- Proactively recruit food trucks in dedicated area along Dundas Place
- Identify opportunities for new parking spaces in the Core Area

Medium-term actions

- Establish permanent Coordinated Informed Response Program
- Establish more daytime resting spaces (40)
- Establish Core Area stabilization spaces (up to 20 beds for addiction support)
- Create new housing units with supportive living arrangements (up to 30 new housing units)
- Expand case management approach for helping vulnerable populations
- Complete and implement Affordable Housing Community Improvement Plan
- Create four-year Core Area Ambassador pilot program (wear uniforms and provide assistance)
- Undertake Core Area safety audit
- Establish new storefront space for foot patrol, By-law Enforcement Officers and public washrooms
- Increase London Police Services foot patrol
- Enforce loitering regulations
- Develop and deliver safety training for business owners, employees and residents existing Façade Improvement Loan Program to incent decorative gates through existing Community Improvement Plans
- Undertake safety blitz for aggressive driving in the Core Area
- Proactive enforcement of Property Standards By-law
- Package Core Area patio, signage, licensing and other regular business
- Processes
- Brand uniforms and equipment for all City staff providing service in the Core Area
- Establish, implement and regularly monitor a higher clean standard for the Core Area
- Implement new pressure wash program for sidewalks and civic spaces
- Provide incentives for installing plumbing and hose connections on storefront through existing Community Improvement Plans

- Implement Core Area infrastructure monitoring program
- Encourage shipping container pop-up retail uses during construction
- Provide incentives for installing awnings through existing Community Improvement Plans
- Fund four-year Core Area “construction dollars” pilot program (give $$ to the BIAs that can be given to customers who visit despite construction)
- Experiment with temporary free municipal parking
- Increase range and intensity of programming in Core Area
- Activate spaces and places with bistro chairs and tables
- Create a projection art program
- Create an infrastructure art and beautification program
- Engage Core Area businesses to lead, volunteer or fund initiatives
- Explore partnership opportunities with educational institutions for
- Immersive learning in Core Area

Long-term actions

- Establish new Core Area garbage and recycling collection program
- Regenerate London and Middlesex Housing Corporation housing stock (social housing average building 50 years old).
- Complete and implement the Housing Stability Plan
- Open permanent supervised consumption facility in appropriate location and close existing temporary facility
- Provide grants to implement safety audit recommendations on privately-owned property through Core Area Community Improvement Plan
- Implement safety audit recommendations on public property
- Implement Core Area digital solutions (B2B, B2BIA, public concerns, etc.)
- Use CityStudio to explore innovative approaches to addressing Core Area social issues
- Work with surrounding communities to establish a regional strategy for addressing vulnerable populations
- Explore opportunities to partner with agencies to provide a Core Area Resource Centre
- Prioritize Core Area for public art
- Explore opportunities for additional public washrooms
- Eliminate encroachment fees for patios, signage and awnings in the Core Area through Core Area Community Improvement Plan
- Eliminate application fees for encroachments, signage and patios in the Core Area through Core Area Community Improvement Plan
- Eliminate fees for use of on-street parking spaces for temporary restaurant patios through Core Area Community Improvement Plan
- Discourage perpetual extension of temporary surface parking lots in Core Area
- Continue to enhance transit service to the Core Area
- Continue to improve cycling infrastructure in the Core Area
- Plan and save funds for a public parking garage
- Inventory social services in the Core Area

17.1.13 Downtown London Market Assessment 2017

Defines the downtown in the following zones:

Downtown Core
The downtown core population is 4,835. It grew strongly between 2011-2016 (+16%), median age 34 and educated 44% have a bachelor's degree or higher. Daytime population is 51,000

BIA Population
The BIA population is 7,059 (Census) also growing fast and young/educated. The median household income $49k (Census)

4,800 workforce – health/education 30% of total, professional services, admin and finance (28%) and accommodation/food/retail (17%). The population is 48% young professionals, Empty nesters and some young families.

Daytime population is 55,000

32 of the top 100 employers are downtown and 21% of all London workers are downtown

Greater Downtown Core
The Greater Downtown Core (CBRE boundary) has a population of 14K (2016), growing relatively fast (+7%) a little lower level of education.

Downtown Visitors
Downtown visitors come for the farmers market, seasonal events, Budweiser Gardens (670K/year), London Knights (250K/year) and major events (2.75 million) – conferences, etc.

The report also discusses the wider trade area for London and has a review of residential markets.

17.1.14 State of the Downtown 2019 report

Begins with generic overview of why downtowns are important.

Includes a summary of previous public investment in the downtown including:

- In 1986, financial incentives programs for the downtown were initiated (Façade Improvement Loan) and continue to this day.
- The Downtown Millennium Plan, prepared in 1998. Due to this plan, over $100 million was invested in public facilities including Budweiser Gardens the Central Library and Covent Garden Market.
- Our Move Forward: London's Downtown Plan was adopted in 2015 includes 10 transformational projects that focus on large-scale improvements to public spaces and facilities. One of these, Dundas Place, was completed in 2019.
- In November 2019, Council received the Core Area Action Plan which outlined approximately 70 initiatives to help support the downtown. Through the 2020-2023 Multi-Year Budget, funding was approved for many of those initiatives, highlighting the City's continued commitment to the vitality of the downtown.

2019 downtown highlights:

- Dundas Place, the first Transformational Project in Our Move Forward, London's Downtown Plan, was completed in 2019.
- In 2018 and 2019, seven different projects/initiatives in the downtown won awards including 2 International Downtown Association (IDA) awards, 4 London Heritage Awards and 1 Urban Design Award.
- In 2019, the downtown – 0.2% of the city's land area - contributed 5.5% of the total municipal taxes.
- The assessment value of downtown has increased by 70% over the past 10 years, reaching $1.96 billion in 2019.
- For 2018 and 2019, the total construction value in the downtown for residential, commercial, institutional, and industrial projects totaled over $143 million.
- In 2018 and 2019, a total of 134 affordable housing units were added downtown.
- Four downtown technology companies were featured on the 2019 annual ranking of 500 of Canada's Fastest Growing Companies.
- The second building in Fanshawe College's Downtown Campus successfully opened in 2018; drawing over 3,300 student and 250 staff/faculty in total to the downtown.
- Almost 40,000 people are employed in jobs in downtown - 19% of all jobs in the city.
- Downtown retained approximately 75% of London's total supply of office space.
- Music, entertainment, and cultural events drew over 5.5 million people to indoor and outdoor downtown destinations in 2018 and 2019.
- The City hosted the 2019 JUNO Awards and Home County Music & Art Festival, producing a combined total of almost $18 million impact on the economy.
- CIP financial incentives contributed approximately $1.24 million in loans during this two-year period, leveraging $3.35 million in private sector investment.

17.1.15 Downtown Occupancy rates

In Q4 2018 CBRE reported that by the fourth quarter in 2018, the London core office vacancy rate was 21.3%; above average for the market's five-year average of 16.4% and higher than what is considered to be a "healthy" rate of 5 to 8%.

In 2020 CBRE reported a vacancy rate of 17.7% - down slight from 2019 and 2018.

There has been no new supply (net) of office space in the past three years[46]

The vacancy rate for seniors housing dropped from 12% in 2019 to 3% in 2020 (CBRE).

[46] . https://www.cbre.ca/-/media/cbre/countrycanada/services/vashotels/2020-canada-market-outlook_english.pdf

17.1.16 Downtown building permit report

Commercial construction values have remained relatively limited in recent years averaging less than $20 million /year since 2014. Residential values have been higher until 2019 when the was almost no residential construction activity.

The city added no new apartments in 2019 after 175 in 2018 and 245 in 2017.

From the CBRE 2020 report on London:

Multifamily Pipeline to Change Downtown Skyline

Developers are pushing ahead with new high-rise developments that will change London's downtown skyline. Forecast to deliver 1,300 new units with another 2,000 in the planning and permitting stages, this development cycle is expected to boost population figures in the city's core. In turn, this should help to increase the performance of all assets and lead to greater investment activity.

17.1.17 List of Downtown Levy Paying members

The BIA submits a budget to council each year, when approved the budget is then applied to the commercial tax rate.

In 2021 the total commercial assessment is $887 million. The BIA levy amount is $1.89 million resulting in a levy 'rate' of about 0.21% of assessment. As a share of total property taxes, the BIA levy is just under 6% of the total.

17.1.18 Live Work Learn Play Report

Downtown London Retail Use Catalogue/ Downtown London District Strategy & Program (October 2017) - 70+ page report

Outlines 11 different retail districts: The Forks, North Row, Richmond Row, Victoria Park, The Civic, Convention Centre, Carling Lane, Dundas Place, South Row, Market Garden and King Talbot.

The report provides a summary of each district including future programming. For example, for The Forks district, the focus is on a scenic and natural setting for activity-based activities such as cycling, running, and walking along the Thames River. Potential Future Programming:

- Picnic tables and seating
- Interactive installations and wayfinding
- Food and beverage carts
- Pop-up retail
- Activity-based rental kiosk
- Microbrewery beer garden
- Outdoor gathering space

The report describes the program use categories along with Target customer, suggested location, size range and peak hours of operation:

- Destination Food & Beverage

- Quick-Serve/Grab-and-Go
- Treats
- Food-Related Retail
- Retail
- Activity-based Retail
- Entertainment
- Amenities and Services
- Arts & Culture
- Institutional/Education

Other analysis from the 2017 Live Work Learn Play includes:

Reconnaissance & Strategic Assessment
What IS working in the downtown: 1. Strong bones, Strong Anchors, 3 Emerging Regional Identity.
What IS NOT working in the downtown: Drug use and street culture; lack of development sites; conflicting mandates

Recommendations:
Immediate: Disarm Drug Use & Street Culture
Short-term: Advance Downtown Transformations, pilot new strategic interventions
Medium-Term: Sponsor More Development Downtown; Reprogram & Re-tenant Downtown
Long-Term: Coordinated Economic Development Plan for Town & Gown Integration Improve the Downtown Experience

Market Assessment
- 1.9 million visited the downtown (2015). 55,000 work in the downtown.
- Residential market has significant new supply planned
- Downtown is not a dominant retail node
- Retail vacancy has come down, but office vacancy is high
- A digital cluster is emerging, but other clusters are scarce.
- 30% of hotel rooms are in the downtown
- Convention centre is a driver of activity.

17.1.19 Downtown Business Directory

There are two sources of data here. The BIA list from the city – which has about 700 or so businesses and the Statistics Canada location counts data base for the three Census Tracts closely conforming to the BIA (but slightly larger) which show about 1,485 businesses with employees including:

- 52 construction establishments
- 146 retail establishments
- 128 finance and insurance establishments
- 101 real estate firms
- 306 professional services firms
- 170 health care and social assistance

- 137 personal services
- 158 food services and drinking places
- 11 accommodations services providers

Also, the downtown is home to 20% of the IT firms in the London CMA and an estimated 56% of estimated IT employment. A more fulsome analysis will be completed on this data.

17.1.20 Open/Closed Business List

The report is for both 2018/2019 and indicated 952 businesses in the downtown of which there were 21 openings and 12 closings for a net gain of nine.

17.1.21 Canadian Urban Institute (2020) Bringing Back Canada's Main Streets

In response to the COVID -19 pandemic, the Canadian Urban Institute published a table of possible actions that BIAs, municipalities and other partners can undertake to bring business, investment and people back to Canadian downtowns. The actions are grouped under five categories - People, Places, Anchors, Businesses and Leadership – and a number of actions are highlighted as either Priority Immediate Actions or Immediate and Longer Actions. Examples of Priority Immediate Actions include:

- Promote and support year-round sidewalk cafes and patios by reducing or eliminating fees, streamlining and fast-tracking approvals), and allowing annual permits
- Develop local plans, strategies and design guidelines for winter-friendly place-making and encouraging people to visit main street
- Offer financial assistance and waive fees to mitigate the costs to small businesses of adapting to COVID-19
- Redesign commercial rent assistance programs based on lessons to date, in consultation with the business community
- Extend and expand emergency small business financial assistance to address ongoing revenue and cashflow shortfalls well into 2021
- Collect neighbourhood-level data in order to measure the economic recovery and support decision-making at the local level.

Examples of Immediate and Longer Actions include:

- Develop a coordinated approach to occupying and animating vacant retail spaces
- Provide or increase grants or property tax relief for live music and cultural venues
- Review municipal permitting processes to ensure they support new business creation
- Review and update municipal and provincial procurement policies to ensure they favour local and diverse businesses.
- Explore options to reduce or mitigate the property tax burden on main street small businesses, such as by enabling municipalities to set differential tax rates or caps to establish new commercial property classes, or to implement split assessment that reflect current rather than unrealized future use
- Establish local "Main Street Alliances" to lead a coordinated revival of main street districts.
- Establish neighbourhood main street offices to engage communities and businesses in main street recovery and planning

DOWNTOWN
LONDON
RE-IMAGINED

17.1.22 City of London Core Area Action Plan (October 28, 2019)

The Core Area Action Plan includes Downtown London, Richmond Row Old East Village and Midtown. The Action Plan opens with the statement, “The health, vitality and resiliency of the Core Area is key to any successful economic development strategy for London and sends an important message to the world about London as a place to live and do business.”

Figure 44: London Core Area

Source: City of London

The Core Area includes the Downtown, Richmond Row and the Old East Village and encompasses most of the London Downtown and the Old East Village Business Improvement Areas (see Map1 below).

The Action Plan references the 2017 State of the Downtown Report and the Old East Village Progress Report and notes that the City has invested over $200 million in projects and programs such as Budweiser Gardens, Covent Garden Market, the Fanshawe College Downtown Campus, Dundas Place Flex Street and financial incentive programs.

Despite these investments, the Core Area was widely viewed having several persistent issues that inhibit it from becoming the successful, as not the healthy, vital, and resilient place that was envisioned. Interviews with a diverse group of Londoners who have an interest and experience in the Core Area identified a number of key perspectives about what is preventing the Core Area to succeed including:

- people struggling with homelessness and health issues
- people not feeling safe
- the need to create an environment that allows businesses to succeed
- the need to attract more people

Accordingly, the Action Plan identified a series of short-term (immediate to 6 months), medium -term (6 months-12 months), and long-term (1-2 years) actions that complement or build on existing initiatives such as the Housing Stability Plan, The Middlesex-London Community Drug-and Alcohol Strategy, Our Move Forward: London's Downtown Plan, The Rapid Transit Master Plan, The Downtown Parking Strategy, and The Core Are Construction Program.

The actions are comprehensive in scope and involve many partners. Examples of the recommended actions include:

- Create a permanent Co-ordinated Informed Response Team that would "…compassionately work with individuals to find safe locations for them to rest and focus on their needs to maintain housing stability"
- Creating a Headlease Program whereby the City or a partner agency signs the headlease to secure the housing unit for the participant
- Deter crime and facilitate public order by increasing the number of foot patrol officers, staging the London Police Services Command vehicle at strategic locations, creating a Spotlight Program to raise the visibility and awareness of security cameras, and providing financial incentives for installing up lighting on privately-owned buildings
- Increase public parking at the Queens Avenue parking lot, identifying opportunities for the creation of new parking spaces
- Create and implement the Affordable Housing Community Improvement Plan that would provide financial incentives for constructing new affordable housing
- Create approximately 30 new supportive housing units
- Create a four-year Core area Ambassador Program where Ambassadors will walk throughout the Core Area from 7am until 11pm, seven days per week, offering information, assistance, and a welcoming perspective. They will identify issues that they encounter and connect with the Coordinated Informed Response team to get people the help and care they need.
- Complete a Core Area Safety Audit
- Package Core Area patio, signage, licensing and other regular business processes and hire one of more Core Area Specialists to make it easier for business owners to locate a new business to expand an existing business.
- Enhance the City's maintenance, cleaning, garbage pick-up and recycling standards, programs, and operations.
- Support an increased range and intensity of event programming and provide more resting places (e.g. bistro chairs, benches) for people to rest.
- Prioritize the Core Area for public art and create an infrastructure art and beautification program.

- Eliminate application fees for encroachments, signage and patios and eliminate fees for the use of on-street parking spaces tor temporary restaurant patios.
- Discourage the ongoing extension of surface commercial parking lots

17.1.23 The London Plan (Approved in December 2016)

The "Urban Places" chapter of the London Plan – the City's Official Plan – contains a section entitled "Downtown".

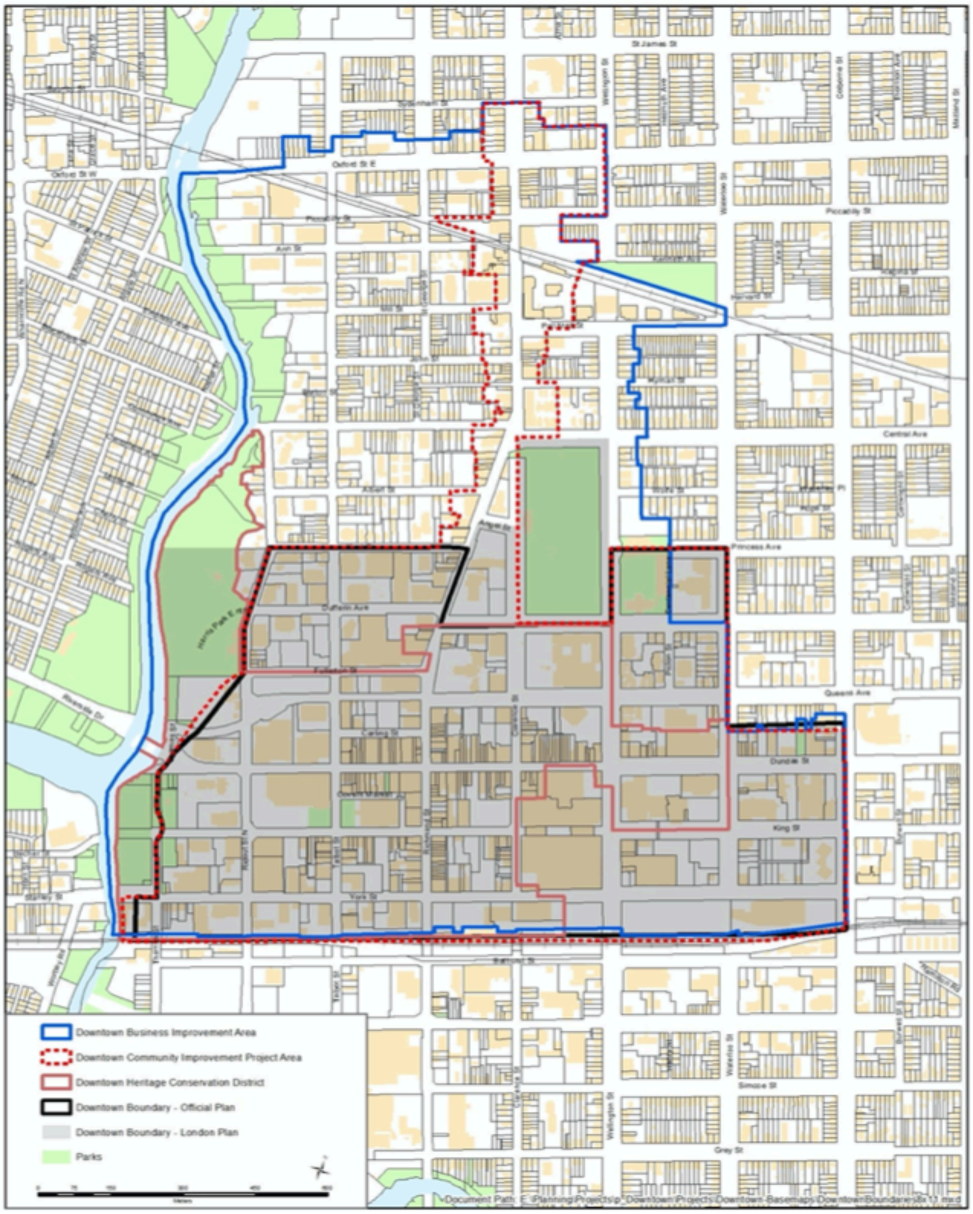
The vision for the Downtown, the boundaries of which are shown on the Downtown Boundaries Map below, is:

> "Our Downtown will exude excitement, vibrancy, and a high quality of urban living. It will be the preeminent destination place for Londoners, residents from our region, and tourists to experience diverse culture, arts, recreation, entertainment, shopping and food. Our Downtown will showcase our history and offer vibrant and comfortable public places filled with people, ranging from large city-wide gathering places to heavily treed urban plazas and intimate parkettes."

The vision is to be achieved through the implementation of numerous initiatives such as:

- Preparation of a Downtown Master Plan, a Community Improvement Plan, a Heritage Conservation District Plan, a Parking Plan, and Urban Design Guidelines.
- Ensuring that civic infrastructure is planned to facilitate and accommodate growth and development Downtown.
- Investing in cultural and institutional uses that will act as catalysts for Downtown improvement.
- Investing strategically in the development and maintenance of the Downtown's public realm.
- Encouraging residential development including such measures as building residential neighbourhood amenities, designing inviting park spaces and offering financial incentives for residential construction.
- Creating strong connections to the Thames River through our streets, pathways, and by fronting Downtown development onto to the river corridor wherever possible.
- Developing a network of urban parks, lanes, and plazas to provide passive recreational and social spaces and common useable amenity space within the Downtown.
- Directing large-scale office developments, greater than 5,000m 2, to the Downtown to prevent the deterioration of the important Downtown office market while still allowing for a reasonable supply of office uses outside of the Downtown. locating major government buildings, hotels, convention centres, and large entertainment and cultural facilities in the Downtown.
- Establishing strong physical and collaborative connections between the Downtown and the surrounding urban business areas such as Richmond Row, the Old East Village, SOHO, and Hamilton Road.
- Establishing the Downtown as the hub of mobility in our city, serving as the city's primary station for rapid transit, regional bus, rail and any future high speed rail network.

DowntownBoundaries8x11.jpg

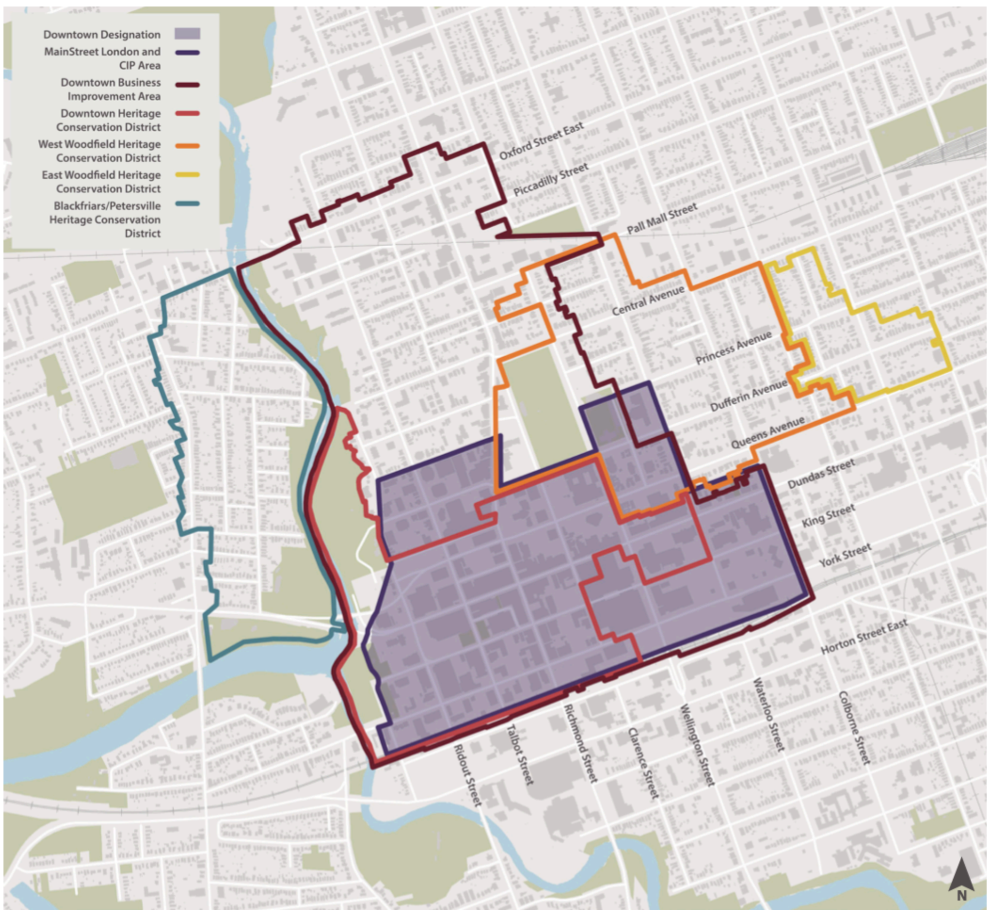


The Downtown is to have the tallest buildings and the highest densities permitted in the city.

17.1.24 Our Move Forward: London's Downtown Plan, April 14, 2015

This Plan is a guideline document under Chapter 19 of London's Official Plan. As with past planning documents such as 1998's Downtown Millennium Plan, it emphasizes public and private partnership initiatives in the context that downtown London is London's face to the world and that a successful downtown is key for retaining and attracting business investment in London. The boundaries of the Downtown and associated neighbourhood and organizational boundaries are shown on Map 1 below:

Map1: Downtown Boundaries



Our Move Forward seeks to build on past successes using a series of public realm-oriented Transformational Projects to tie together the successful work that has already been completed leverage private sector investment. Map 11 shows the location of the proposed Transformational Projects.

Map 11

These Transformational Projects are complemented by medium- and small-scale projects and other initiatives and it was envisioned that a municipal budget allocation of $500,000 annually over four years would be sufficient to complete up to 10 small-scale projects.

The Implementation and Targets section of the Plan discusses the timing associated with the initiatives and Transformational Projects and establishes a system to prioritize these to help direct budgeting and planning in future years. It was anticipated that the first four years of implementing this Plan would include pursuing Dundas Place and Forks of The Thames for the large-scale projects, and/or phases of each as medium- scale projects. The Plan notes that a municipal budget allocation of $500,000 annually would be sufficient to complete up to 10 small-scale projects over a four-year period. Finally, the Plan proposed the creation of a standing downtown coordinating committee of City, agency and BIA staff to regularly set targets and measure progress on them in a variety of operational areas where mandates overlap.

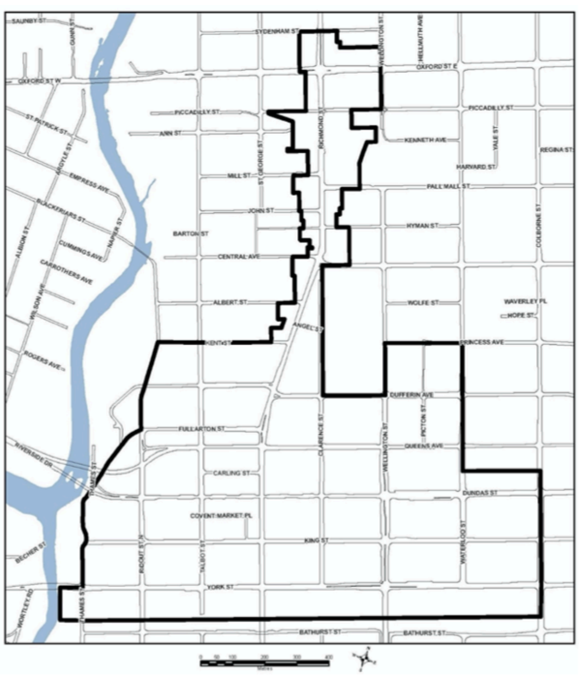
17.1.25 Downtown London Community Improvement Plan (1995?)

The purpose of the Downtown Community Improvement Plan (CIP) is to provide the context for a coordinated municipal effort to improve the physical, economic and social climates of the Downtown. The initiatives undertaken through the CIP, "…are intended to stimulate private investment and property maintenance and renewal in the Downtown. The focus of these initiatives, and of the Community Improvement Plan, is to foster an environment that will increase the supply of residential units within the Downtown to ensure a viable Downtown population, and to encourage the provision of unique or specialized attractions and public facilities, and the location of community events and public improvements such as streetscape improvements and pedestrian amenities to make the Downtown an attractive place for these types of investment to occur. The Downtown Community Improvement Plan will be administered through the Planning Division, with assistance provided by the various Departments and Divisions assigned the responsibility for specific implementation project." The area covered by the Downtown London CIP (Figure 1) as the same area that is designated as "Downtown Area" in the Official Plan.

The CIP envisages use of a broad range of strategies and incentives including: rehabilitation grants, tax incentives for historic preservation, development charge reductions/exemptions for residential development, no development application or permit fees for renovation and rehabilitation projects, no parking requirements for Downtown development, and an expanded facade improvement loan program/facade restoration loan program. The CIP also refers to partnership programs (e.g., a Downtown Development Corporation and joint venture projects) and regulatory incentives (e.g., restricting suburban office space and entertainment facilities, limiting temporary surface parking lots, and implementing a Development Permit system).

The City's website refers to a proposed amendment to the Downtown CIP that would introduce, "… performance measures, indicators of success, and targets for the Residential Development Charges Grant, Rehabilitation and Redevelopment Tax Grant, Upgrade to Building Code Loan, and Façade Improvement Loan programs. When met, the targets will inform Civic Administration to modify the incentive programs, including potentially reducing grant or loan funding, or to discontinue the incentive program." The information posted on the website is dated December 17, 2020 so it may be that the amendment process has been delayed because of the pandemic. The Notice for the proposed amendment shows that the boundaries of the Downtown CIP area either have been or are proposed to be extended north along Richmond Street from Kent Street to the intersection of Richmond Street and Oxford Street.

Figure 45: Downtown Community Improvement Area



Source: City of London

17.1.26 Report to Civic Works Committee Re: Cycling and Transportation Demand Management Upcoming Projects (March 30, 2021)

The purpose of the report was to update Committee and Council on key cycling and Transportation Demand Management (TDM) projects in 2021 in the areas of: measuring progress on cycling, bike parking, cycling infrastructure, measuring progress on Transportation Demand Management, Business Travel Wise Program, development of a Transportation Management Association (TMA), development of a Bike Share System, permitting E-scooter use and potential pilot project, and permitting cargo e-bikes. The report also provides details to allow Committee and Council to approve the recommended minimum number of e-scooters at 250 in the micro-mobility request for proposal (RFP). This report also seeks direction to develop a plan and initiate a process to allow cargo e-bikes in London. The Province has recently permitted a five-year pilot framework subject to a municipality passing a by-law containing the operating parameters and requirements for cargo e-bikes. There is nothing in the report specific to the Downtown.

17.1.27 City of London Road Safety Strategy 2014-2019

Led by the City of London, and in collaboration with the Middlesex London Health Unit, Middlesex County, and other partners. Based on a review of collision history data for the period 2008-2011, it was determined that the key areas need to be addressed by the Strategy were: Young Drivers, Intersections, Distracted and Aggressive Driving, Pedestrians, Cyclists, and Red Light Running. The countermeasures were based on Engineering, Enforcement, Education and Empathy approaches with special focus on prevention of future fatal and injury collisions. All programs and their respective actions forming the Road Safety Strategy have been adopted by the City of London, County of Middlesex, and their partners. They believe that these programs can be realistically delivered and will effectively result in 155 fewer fatal and injury collisions by 2019/2020. The Strategy does not contain any specific references to the Downtown in terms of problems, issues or countermeasures.

17.1.28 IBI and WSP, Shift -London's Rapid Transit Initiative Business Case (May 2016)

The development of some form of rapid transit system is a key element of implementing the London Plan and the Business Case document concluded that a Bus Rapid Transit system was the most effective option for London and yield key benefits in a number of areas including:

- Connect major economic activities
- Address existing and increasing transit capacity shortfalls
- Support healthy communities and active transportation
- Help strengthen London's connectivity across Ontario
- Reduce costs needed to expand the road network
- Support broader city-building in London

The draft London Plan envisions a city that grows in a compact way – taking advantage of existing infrastructure, minimizing energy costs, reducing emissions, allowing for healthy lifestyles and minimizing intrusion into our agricultural lands. Municipal Council has established an intensification target of 45%, with 75% of that intensification to occur within the central portion of the city (defined as the Primary Transit Area).

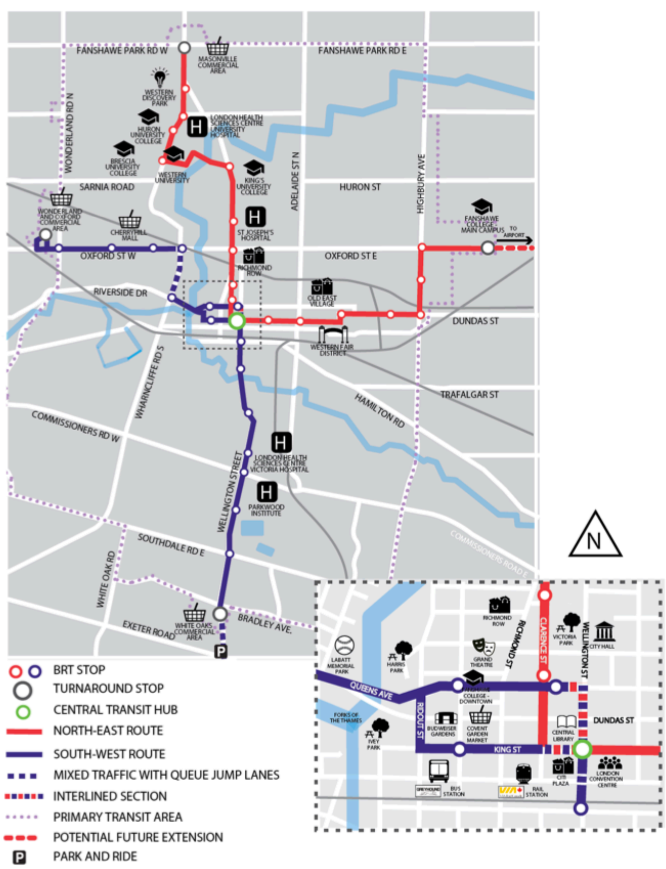
Rapid transit is a fundamental requirement to support and stimulate this shape of growth. Rapid transit will allow for urban regeneration and the Downtown Vision to be realized (emphasis added).

17.1.29 IBI and WSP, London Bus Rapid Transit Project Assessment Process and Environmental Project Report (March 2019)

The BRT system will be a total of 24 kilometres in length with 38 stops over two routes: 1) North and East; and, 2) South and West as shown below on Exhibit ES – 3: London's Bus Rapid Transit Network. The South and West Route includes a Downtown Loop and both routes connect with a Central Transit Hub located in Downtown London and within a five-minute walk of the Via Rail Station. The key benefits of the new

Construction of Phase One of the Downtown Loop on King Street, from Ridout Street North to Wellington Street, will add new streetscape elements as well as transportation and transit improvements above ground, while repairing and replacing aging sewers, watermains and other underground infrastructure. Construction is expected to run from April 2021to December 2021.

Exhibit ES- 3: London's Bus Rapid Transit Network



17.1.30 Kathy McLaughlin MSL Incentive Program Summary (March 21, 2021)

The following is a summary of incentive programs available in the downtown. Downtown London no longer provides hand-on support for the City programs. Applicants are referred to the City Planner who administers the programs.

Incentive Program Summary

1/ Overview of programs:

- Attached documents provide fact sheets and historical data on grants to date, and boundary map showing the 4 different incentive boundaries. I also shared our About Face application and addendum FYI. The addendum is the same one used by the City... covers liability issues related to these projects and programs
- Three different combinations of City incentives are available, depending on property location (Richmond Row, the Targeted Incentive Zone, and the old Community Improvement Plan area). ONLY property owners can apply for the City incentive programs. Note we lobbied for Richmond Row incentives after the boundary expansion.
- MainStreet programs apply to ALL buildings within our BIA boundary (ie, outside of the City's three targeted zones). Any business owner or property owner can apply for our funding (this is what I call the fourth version/option... if all else fails, we still can help)
- Currently we DO NOT OFFER the About Face Facade Grant (except for the $100,000 Fanshawe grant instalment); the remaining About Face budget was absorbed into the COVID grant programs.
- Currently we DO NOT OFFER the Tenant Improvement Loan. It was previously offered to targeted new and expanding current businesses. We recently proposed a much smaller Business Expansion Grant for existing businesses to move into new/bigger spaces and applies to leasehold improvements only, no equipment or portable items.
- We currently DO NOT OFFER incentives for new businesses to do tenant improvements - board had no time to review/approve these requests for the past 2 years, and funding was reallocated to COVID relief budget. Previously this was a helpful attraction tool to get targeted businesses into sub-standard vacant spaces. One business was offered a tenant loan but we couldn't get it to the board for approval in 2019 due to competing priorities.

2/ Our role:

- Marketing and promoting all of the incentive programs (building owners, business owners, investors, realtors, etc.) This includes creating fact sheets (see attached). The City only has a generic brochure, and detailed program documents approved by Council. We provide print and digital versions of the fact sheets for existing members, and use them as recruitment tools with businesses and investors.
- Up-front consultation on project design, scope of work, navigating all the incentives and identifying which ones they can apply for based on the scope of work/location.
- Maximizing incentives available to support investment projects (both property investors and business owners), sometimes persuading owners to do more than the minimal amount of work for maximum impact (e.g. Mike Manuel/ London Music Hall marquee and illuminated sign)
- Helping business owners and property owners navigate through the project preparation, application, consultation, approval and construction stages of the work
- Application prep, completion and submission to Planning for review/approval (as needed)
- Heritage consultation, Heritage Alteration Permit completion and submission, and approvals with City Heritage Planners, attendance at London Advisory Committee on Heritage (LACH) - facade and sign design, lighting design for uplighting grant
- Referrals to contractors (general, heritage specialists), sign companies and other specialized service providers -- note that these are referrals only, not recommendations (there are potential liability issues, and also perceptions of favouritism that we need to be mindful of in this part of our work)
- Zoning and permit issue resolution (permitted uses, variance applications/ Committee of Adjustment, business licenses, building permits, sign permits, etc);
- Arrange and attend site visits with City staff to scope projects, check progress (large scale projects), engage City staff in helping the member fix their building.
- Celebrate and promote the finished project!

3/ How the MSL and C of L incentives work together:

- For sign projects, usually the business owner just wants grant funding (About Face)
- For larger scale facade / upgrade projects, we work with the client to identify the proposed scope of work, make sure they are aware of all the incentives that may support the work and sometimes encourage the client to do more than they were originally planning if it's appropriate/necessary to rehab the property. I usually sit with the applicant and complete applications for them, as needed. Once I have their estimates, I submit them. Most City incentive applicants ask for this help. Compiling and organizing the estimates can be challenging, causes delays. We also help them with incentive applications because they are busy with other aspects of getting their business open and delays cost them time and money. They can't start the renos until they are approved for funding.
- For the larger projects, I coordinate site visits with Planning and Heritage staff to review the scope of work, introduce the members and build the supportive relationship.
- If it is a facade project, I always try to get them to apply for the interest-free loan as well as the About Face grant. If the landlord won't apply for it (usually because a lien gets placed on the property title until the loan is repaid), then the grant is the only incentive the tenant can qualify for.
- If it's an Upgrade to Building/Fire Code project, the only incentive we had for interior work was the tenant improvement loan, which complemented the upgrade loan program but did not cover the same expenses. It was more of a "last mile" program to cover a gap left by the City's incentives, but only available to new or expanding downtown businesses. It was not to be used for redecorating/refreshing interiors.
- For all larger scale improvements, where the scope of work/building permit requirement may trigger an MPAC reassessment and ultimately increase taxes, I get them to apply for the Rehabilitation and Redevelopment Tax Grant. They must be pre-approved, no retroactive grant requests. I did help a property owner appeal this rule once, but it's a 3-4 month process through PEC and Council. We supported their request. MSL has no tax-related programs, but these (including the development charge grant) were popular with investors who were making significant improvements to their buildings.
- For facade projects, we hold back grant funding until City staff sign off on completed projects, to ensure their design and property standards are met. Their final inspection is key to achieve optimal results and ensure we have no liability issues.
- Our grant amount calculation was typically in the range of a matching grant for the applicant's portion of the expenses, with the City loan covering the other half, up to the maximum. Our maximum facade grant was $25,000 (except the Fanshawe grant).

17.1.31 MSL Loans and Grants Summary

As shown in the Table below, in the five-year period from 2016-2220, 109 loans and grants valued at $3,825,362.31 were issued with a related construction value of $3,825,362.31. The most commons forms of financial incentives were Tax Grants and Upgrade to Building Code Loans. The total annual value of Tax Grants has decreased every year since 2016 from a high of $470,437 in 2016 to a low of $92,768 in 2020

Table 19: Downtown London Grants 2016 to 2020

Type Of Loan/Grant	Number Awarded	Value	Construction Value
Upgrade to Building Code Loan	27	$2,068,068.67	$5,784,036.66
Façade Improvement Loan	15	$338,193.64	$1,003,074.41
Façade Up lighting Grant	5	$24,410	N/A
Heritage CIP	1	$79,177	N/A
Brownfield CIP	2	$19,888	N/A
Post-2018 DC Grant	1	$14,895	N/A
Tax Grants	58	$1,280,730	N/A
TOTAL	**109**	**$3,825,362.31**	**$6,787,111.07**

17.1.32 Ontario BIA Association and the Toronto Association of BIAs (April 2017) Return on Investment of BIAs Report

Prepared by FOTENN Consultants with financial support from the Ministry of Municipal Affairs, the report was intended to identify a common set of indicators for BIAs across Ontario that could be used to demonstrate the BIAs' roles in local economies and community development. The research led to the identification of 30 indicators under four key goals: Street Appeal, Economic Development, Supporting Small Business (Business Impact, Visitation, Movement, Marketing), and Community Building (Internal and External Community Building). Based on feedback from BIAs, the following seven key indicators were identified:

1. Sales (actual numbers)
2. Gross District Product (sales and employment by square acreage)
3. Employment
4. Business Mix (anchors, critical mass, plan alignment)
5. Business Resiliency (turnover vacancy and longevity)
6. Money leveraged for streetscape
7. Visitor satisfaction

The report noted that some of the data required to consistently and accurately report on the indicators would require funding support from the province and municipalities and recommended that a central data portal that could be used by BIAs and municipalities, should be created by the OBIAA and TABIA. The report suggested that the OBIAA and TABIA partner with an institution such as a university or college to create a research hub for Small Business and BIAs that could assemble, analyze and house the relevant data. Finally, the report references a long-range communications plan and need for a communications toolkit that will help each BIA use and share information and stories using the indicators that best meet their respective ongoing needs.

17.1.33 The Canadian Real Estate Association London and St. Thomas Association of Realtors Statistical Package, February 2021

The Statistical Package provides monthly and year-to-date data about sales activity, dollar volume, new and active listings, months of inventory, new listings, average and median price and median days on the market for single detached dwellings (one and two storey), townhouses and apartments. The markets information is presented for the entire London and St. Thomas market and for the London, Egin, Middlesex, Strathroy-Caradoc and St. Thomas sub-markets. No information is provided specifically for Downtown London.

The data show that the London housing market is experiencing similar trends to major housing markets across Canada in that:

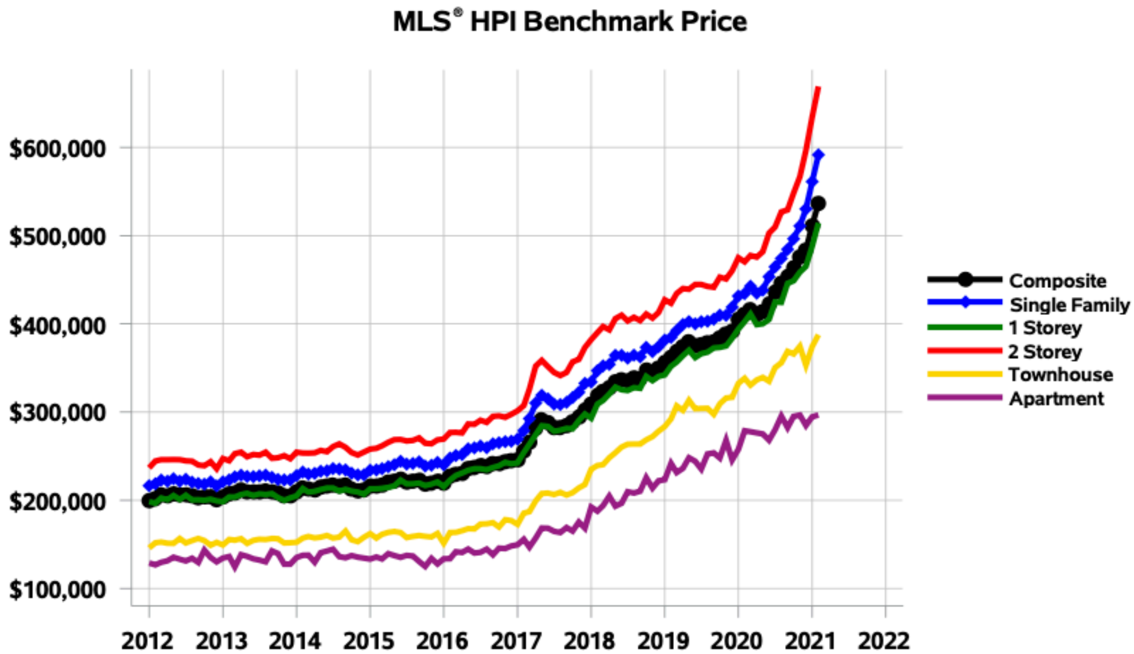
- sales of all forms of housing are considerably higher than in previous years
- available inventory is lower than it has been at any point in the last 20 years
- housing affordability is a major issue as median, average and benchmark prices – especially for single family homes – have all increased considerably in the past few years (see MLS HPI Benchmark Price table and graph below)

CREA THE CANADIAN REAL ESTATE ASSOCIATION

LONDON ST. THOMAS ASSOCIATION OF REALTORS

London and St. Thomas
MLS® HPI Benchmark Price

MLS® Home Price Index Benchmark Price							
		percentage change vs.					
Benchmark Type:	February 2021	1 month ago	3 months ago	6 months ago	12 months ago	3 years ago	5 years ago
Composite	$536,500	4.9	12.8	20.5	30.5	68.3	136.7
Single Family	$591,600	5.4	15.8	24.8	36.3	70.5	138.7
One Storey	$514,400	5.4	12.2	21.2	27.8	66.5	130.8
Two Storey	$669,100	5.5	18.0	27.0	42.3	71.6	141.7
Townhouse	$387,700	3.6	3.5	9.0	14.6	61.9	137.3
Apartment	$296,700	0.7	0.0	0.4	6.4	58.1	121.7



17.1.34 CBRE LONDON Quarterly Statistics Q4 2020 Office

The report describes London's office market as, "…continues to be very slow with minimal movement in the market…although office demand is substantially limited, most of it has been in the suburban areas." As shown in the table below, the 16.4% office vacancy rate in Downtown London far exceeds the suburban area office vacancy rate of 6.3% and despite average office lease rates Downtown London being slightly less than the rates in the suburban areas.

STATISTICS	DOWNTOWN			SUBURBAN			TOTAL		
	Q3 2020	Q4 2020	Q/Q△	Q3 2020	Q4 2020	Q/Q△	Q3 2020	Q4 2020	Q/Q△
Net Rentable Area	4,585,942	4,585,942	◀▶ -	1,605,465	1,605,465	◀▶ -	6,191,407	6,191,407	◀▶ -
Overall Vacancy Rate	17.8%	16.4%	▼ 140 bps	7.5%	6.3%	▼ 120 bps	15.1%	13.8%	▼ 130 bps
Direct Space	742,772	653,219	▼ 12.1%	119,926	101,732	▼ 15.2%	862,698	754,951	▼ 12.5%
Sublet Space	74,008	98,820	▲ 33.5%	0	0	◀▶ -	74,008	98,820	▲ 33.5%
Sublet % of Vacant Space	9.1%	13.1%	▲ 400 bps	0.0%	0.0%	◀▶ -	7.9%	11.6%	▲ 370 bps
Class A Vacancy Rate	11.1%	10.9%	▼ 20 bps	N/A	N/A	◀▶ -	11.1%	10.9%	▼ 20 bps
Average Class A Net Rent (psf)	$14.53	$14.06	▼ $0.47	N/A	N/A	◀▶ -	$14.53	$14.06	▼ $0.47
Current Quarter Absorption	29,670	64,741	▲ 35,071	-508	18,194	▲ 18,702	29,162	82,935	▲ 53,773
Year to Date Absorption	10,763	75,504		160,177	178,371		170,940	253,875	
Current Quarter New Supply	0	0	◀▶ -	0	0	◀▶ -	0	0	◀▶ -
Year to Date New Supply	0	0		67,652	67,652		67,652	67,652	
Under Construction	0	0	◀▶ -	0	0	◀▶ -	0	0	◀▶ -

CBRE RESEARCH | Q4 2020 Quarterly Statistics

CBRE

OFFICE

Market	Inventory (SF)	Net Absorption (SF)	Under Construction (SF)	Average Asking Lease Rate ($/SF)	Vacancy Rate (%)
Core Class A	1,890,953	3,918	-	14.06	10.9
Core All Classes	4,585,942	64,741	-	13.38	16.4
Suburban	1,605,465	18,194	-	15.54	6.3
London Total	**6,191,407**	**82,935**	**-**	**13.67**	**13.8**

17.1.35 CMHC Rental Market Report Canada and Selected Markets (January 2021)

The London CMA section of the document noted that the CMA-wide residential rental vacancy rate increased from 1.8% in October 2019 to 3.4% in October 2020. The vacancy rate in the Downtown-North area that includes Census Tracts closer to Western University showed a corresponding increase from 1.8% to 5% due to the fact that many domestic and international students were either required to or chose to study remotely due to the pandemic. Overall, the London CMA saw an increase of 968 newly completed purpose-built rental units excluding units built for seniors and students and the rate of supply growth exceeded stagnant demand for rental accommodations. Only 2.3% of the rental dwelling units in the London CMA were affordable to households in the lowest income quartile. The report does not provide any details on the reasons for residents leaving the downtown.

17.1.36 Our City, Our Culture: London's Cultural Prosperity Plan Report (2018)

This report highlights our successes London's Cultural Prosperity Plan since its adoption in 2013. The report states, "…culturally, the City of London is "Open for Business" and committed to the sectors' sustainability."

The City's Culture Office participates in an 18-city municipal data measurement consortium and a Municipal Benchmarking Canada initiative to measure and monitor direct investment in the culture sector. The report contains many statistics in this regard, but none are specific to the Downtown.

The City has two culture granting programs: The Community Arts Investment Program and the Community Heritage Investment Program that includes Tax Increment Grants and Development Charge Equivalent Grants. The document notes that the Downtown Community Improvement Plan provides for Façade Improvement Loan Program, a Tax Grant Program, an Upgrade to Building Code Loan Program, and a Combined Residential Development Charges Grant and Tax Grant Program. The document includes a section entitled "A Healthy Core is London's Cultural Showpiece" and notes that a key component of the Cultural Prosperity Plan is to "…nurture the diverse and vibrant cultural scene in the heart of London." Specific reference is made to developing Downtown London as a regional, national and international education centre featuring reuse of the former

Kingsmill Department Store building, and a plan to transform Dundas Street between Wellington Street and Dundas Street into a "…seamless flexible street and linear public space, enabling it to easily transition functions…"

17.1.37 BA Group, Kimley Horne, Read Jones Christofferson Consulting Engineers, Downtown Parking Strategy for the City of London (December 2017)

The City of London (the City) has recently completed a number of planning, urban design and transportation studies that support the future development of the downtown. The provision, management and supply of parking are an area of special relevance to the successful implementation of the Our Move Forward: London's Downtown Plan. The purpose of this Strategy is to determining how much parking is necessary for the functional and economic viability of downtown development programs and the success of the downtown transit hub as well as how the right amount of parking is provided are critical ingredients for future success.

MMM Group was retained by the City of London to prepare the *Downtown London Parking Study 2014 Update* and *2014 Downtown London Parking Needs Assessment.* There are a total of 15,436 parking spaces within the Downtown including on-street, municipal (public), off-street (owned by the City), commercial (public) off-street (privately owned/operated) and private off-street parking (not available for public parking). The total parking supply available across the downtown *for **public use*** is 9,897 spaces with a peak demand of 7,658 spaces (77% occupied).

Parking occupancy observations undertaken in September 2014 found a peak utilization of 71% of the parking spaces across the Downtown with localized demands for Downtown Sub-Areas ranging from 49% to 89% (Figure 1). Peak-period use of different forms of parking spaces ranged from a low of 38% for miscellaneous privately-owned parking spaces to 86% for privately owned parking structures.

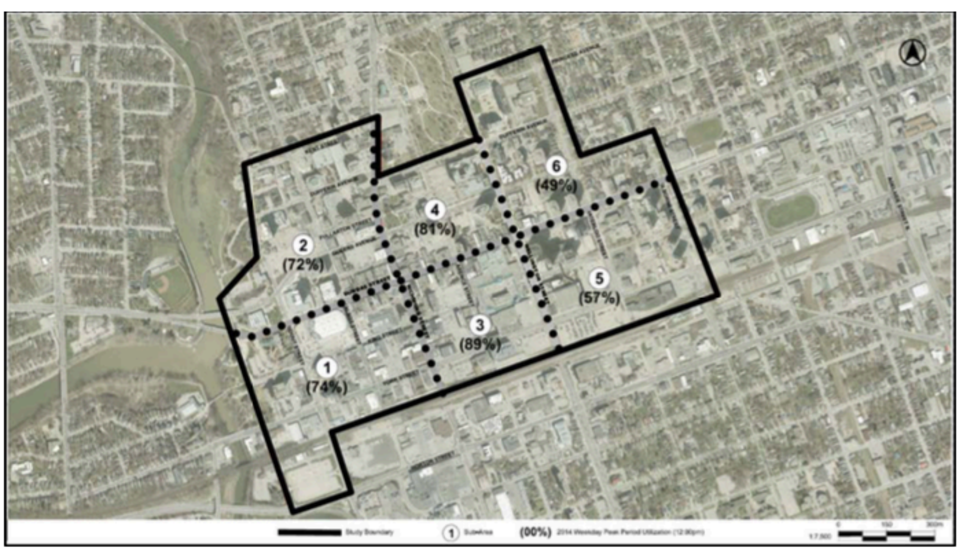


FIGURE 1 - PARKING UTILIZATION BY STUDY SUB-AREA

Table 1 Peak Parking Demand by Facility Type

Category	Parking Supply	Overall Peak Parking Demand	Utilization Percentage
Municipal Parking Lots/Structures	1,953	1,510	77%
Public Pay Lots (Privately Owned)	3,820	2,811	74%
Public Structures (Privately Owned)	3,413	2,950	86%
Private Reserved Lots/Structures	3,653	2,411	66%
Private Miscellaneous Lots	120	46	38%
Semi-Private Public Free Parking Lots[1]	1,766	836	47%
On-Street Parking	711	387	54%
Total	**15,436**	**10,953**	**71%**
Total Publicly Available Parking	**9,897**	**7,660**	**77%**

Notes:
1. Free parking for customers and/or staff (e.g., Tim Hortons). Generally available for the general public that uses the associated services.

The expected development of many existing surface parking lots to accommodate new commercial, residential and institutional uses could result in a significant reduction in existing parking supply and a deficit of parking spaces in some parts of the Downtown, particularly Sub-Area 3.
The Key Recommendations of the Strategy are:

- Explore opportunities to improve coordination of all City owned and controlled on and off-street parking facilities to achieve improved downtown area wide parking management and transportation demand management opportunities.
- Manage the consolidated parking system by using the Enterprise Model. Under this model, the municipal parking system is managed by a City department on a financially self-sustaining basis including operational and life cycle costs as well as future garage development funding. In order to achieve this objective over time, it is recommended that: a) net revenue should be allocated from both on-street and off-street parking operations to a parking reserve fund to assist in financing future shared public parking resources: and, b) the proceeds of future parking lot sales should be allocated to the parking reserve fund.
- Provide 200 to 300 new public parking spaces over the next twenty years through investing in joint venture projects by participating with developers to integrate public parking in new developments in sub-areas 3, 4 and 1 in central and southwest downtown, in order to facilitate meeting City growth targets and urban design objectives.
- Amend the Downtown Community Improvement Plan (CIP) to provide the opportunity for Council to enter into a joint venture financial partnership with private developers to provide additional public parking and municipal parking garages in the downtown including the use of grants and density bonusing
- Take a gradual approach to the discontinuation of temporary zone permissions for temporary surface commercial parking lots in downtown where there is surplus public parking.

- Maintain the current minimum zoning by-law parking supply requirement for new commercial development in the downtown of one space per 90 square metres GFA (1.11 spaces per 1000 square feet) and add bicycle supply requirements.
- Revise the Payment in Lieu (PIL) parking by-law which would provide the flexibility for the City to require a developer to make a cash payment per space to the City for each parking space they are unable to provide. Set the payment in lieu amount at approximately 50% of the estimated capital cost of providing new public parking in the downtown and allocate payments to the reserve fund for public garages.
- Continue strengthening TDM activities and awareness in the downtown area including a focus on integrating and aligning current and future business actions with City actions.
- Ensure that parking facilities that support sustainable mobility choices (e.g., bike parking, car pool spaces, car share, electric vehicle charges, etc.) are positioned to be highly visible and easily accessible.

17.1.38 Downtown London Brand Guidelines Document

As explained in the introduction to the document, the reason for creating and maintaining a strong brand image is critical to its success. They explain that the brand is Downtown London's "ambassador" to be used, shared, and managed by everyone in a consistent and professional way. It is Downtown London's chance to inspire investors / consumers to discover the unique experiences and opportunities in Downtown London. The document outlines the Brands positioning, and character attributes which at their essence are "Inspiration Through Discovery". Any visual imagery or language used must reflect and support "London's downtown character, vibrant, dynamic and diverse; an open invitation to discover all that Downtown London offers and to be inspired by the possibilities".

DOWNTOWN LONDON

The Masterbrand graphic is clearly defined in its allowed uses: typeface, primary colour, support colour palette and clear demonstrations of what is not allowed. All recognized as best practices for a brand manual guidelines.

DOWNTOWN LONDON RE-IMAGINED

17.2 Table of Figures

17.3 Table of Tables

DOWNTOWN
LONDON
RE-IMAGINED

DOWNTOWN LONDON STRATEGY

Community Engagement Report

July 2021

Downtown London Strategy

London Downtown Business Association, 2021

Consulting Team

Aileen Murray, Ec.D. (F), Mellor Murray Consulting

David Campbell, MBA, Jupia Consultants Inc.

Kevin Curtis, PhD, MCIP, Curtis Planning Inc.

Tracy John, Amplify Communications

Advisory Committee

Barbara Maly, Executive Director, Downtown London, Project Lead

Andrew McClenaghan, London Downtown Business Association Board Chair

Don McCallum, Main Street London Board Chair

Jim Bujouves, Farhi Holdings Corporation

Steve Cordes, Youth Opportunities Unlimited

Allan Drewlo, Drewlo Holdings

Cheryl Finn, Tourism London

John Fleming, Western University

Christina Fox, Tech Alliance of Southwestern Ontario

Michelle Giroux, Fanshawe College

Graham Henderson, London Chamber of Commerce

Andrea Hibbert, London Arts Council

Kapil Lakhotia, London Economic Development Corporation

Steve Pellarin, London Small Business Centre

Kelly Scherr, City of London

D/Chief Trish McIntyre - London Police Services

Community Engagement Report

Note: This report is part of the background research for the Downtown London Strategy. The intent of this working paper is to support the analysis and recommendations to be developed in a subsequent phase of the strategy. The opinions included in this report should not be considered recommendations and public input has not been altered even in instances where some comments may not accurately reflect Downtown London policies and practices.

1 Introduction

This report has been prepared as part of the Downtown London Strategy. The intent of this report is to summarize themes emerging from the consultation activities undertaken to support the analysis and recommendations to be developed in the subsequent phase of the strategy. This report provides a summary of the perspectives and insights provided by participating stakeholders, businesses, staff and residents.

The objective of the public engagement is to obtain public input, identify and evaluate options to build a prosperous downtown. The Community Engagement Plan was developed to attract a high level of public and stakeholder participation, involvement and ownership in the development of the Strategy with broad input from a variety of stakeholder groups.

The process of developing the Downtown London Strategy includes the following reports:

- Phase 1: Environmental Scan
- Phase 2: Community Engagement Report (this document)
- Phase 3: Downtown London Strategy
- Executive Summary Report

The entirety of the community engagement was conducted during the COVID-19 pandemic. In May 2021, the pandemic had been a reality for 14 months, when the majority of engagement was conducted, only essential workers were permitted in workplaces. While stakeholders were asked about their behaviour and perceptions pre-COVID-19, it is clear that the impact of the pandemic has influenced the responses throughout this report.

1.1 Community Engagement Plan

The Community Engagement Plan included the following formats and communication tools.

Date	Item	Format/ communication tools
March 2	Project Initiation	PowerPoint presentation Facilitated discussion via Zoom
March 29	Staff Focus Group	PowerPoint presentation Facilitated discussion via Zoom
May 3 - 31	Stakeholder Interviews	Zoom, telephone
May 5	Strategy Public Launch	Project branding Web page Social media Email
May 5 – May 28	Community and Business Surveys	Media release Email members Email stakeholder networks Web page Social media
May 17	Board Governance Focus Group	PowerPoint presentation Facilitated discussion via Zoom
May 28	Boards & Advisory Committee Strategy Focus Group	PowerPoint presentation Facilitated discussion via Zoom
June 9	Arts & Culture Collaboration Focus Group	PowerPoint presentation Facilitated discussion via Zoom
July 6	Summary Engagement Report	Written report PowerPoint presentation

2 Interviews

2.1 Community Stakeholders

Individual interviews were scheduled with key community stakeholders including representatives from major downtown destinations, residential developers, London Mayor and Council, City staff, student presidents, office managers and other aligned organizations. The consultants conducted a total of 23 individuals which was supplemented by an equal number of interviews by Downtown London staff throughout April and May 2021.

These discussions were conducted with the understanding that the comments would not be identifiable to any one person in order to encourage candid input.

The following themes, presented in no particular order of priority or frequency, are listed below:

- **Social issues** – The number of individuals congregating in the downtown who are experiencing homelessness, mental health issues or addiction has increased in the past several years. The social issues became more prominent and more challenging through the COVID-19 pandemic. The centralization of social services in the downtown has contributed to this issue. Several people shared experiences of being confronted by individuals and expressed concern for their personal safety. The safety and security concerns were described as a major deterrent for shoppers, downtown office workers and tourists. Downtown operations are also faced with significant additional costs related to theft, security, building repairs and cleaning.
- **Opportunities out of Adversity** – Many felt that the loosening of the pandemic restrictions would provide an opportunity for a reset in Downtown London. There was general consensus that Downtown London had an exceptional mix of restaurants, cafés and pubs. As COVID-19 restrictions ease, the cluster of unique and independent restaurants will be a great draw for individuals who are missing social interactions and dining experiences.

  There has been a greater appreciation for local business through the pandemic and Downtown London is well positioned to continue to promote its local business community. Downtown business who adapted to E-business in addition to their traditional store-front operation could become more resilient in the long term. Some predicted a resurgence of entrepreneurship post-pandemic that could provide additional demand for retail and service business locations.

  The increasing population in London overall and especially in the downtown was also expected to result in greater opportunities for Downtown London businesses.

  Several people expect the federal and provincial governments to provide more funding programs over the next several years post-COVID-19 which could be used to pay for several of the LDBA programs as it re-engages consumers with the downtown business community.
- **City and BIA Relations** – Some felt that City Council has previously underestimated the contribution the downtown makes to the City's overall economic development and vibrancy through small business development, investment attraction, resident attraction, tourism, culture and diversity. City staff have initiated projects without consulting downtown businesses.

Downtown London's programs have expanded beyond the typical BIA mandate to address unfilled gaps in City programs or services.

The recent City reorganization was seen by many as an opportunity to build greater connections with City and LDBA staff, in number, frequency and effectiveness. It has been noted however that the City reorganization does not include staff at the City Manager's senior team. The middle manager responsible for several urban files includes Downtown London has limited authority to make strategic changes for Downtown London.

Governance – The large number and diversity of LDBA members and the footprint of Downtown London make it difficult to get consensus on the downtown priorities. There is concern about the LDBA board's ability to develop strategy vs. tactics. There has been a history of divisiveness between different districts within Downtown London.

Holding meetings for both the LDBA and MSL boards on the same day has contributed to the confusion of the different mandates of the two organizations. The role of MSL has changed dramatically over its history and some feel it is time to consider a new focus for MSL as a catalyst for larger development projects in the downtown.

Representatives from non-levy paying developments in the downtown are major contributors to traffic in the downtown but reported they feel they are limited in their ability to contribute to Downtown London's strategic direction or governance.

- **Parking** – Concern about the cost and access to parking was a common thread of discussion. Many described limited parking access as a deterrent for clients and customers and an additional cost for staff and employers[1]. Several expressed frustrations about the city's role in granting leases for surface parking lots. They also noted that much of London's population is still car focused.
- **Vacant Buildings** – Another common theme was the frustration with the number of vacant buildings in the downtown with little to no apparent effort to fill these buildings. The vacant buildings contribute to a feeling of disrepair in the downtown and take away from the vibrancy of the street. Some suggested that current City policies were not sufficient to discourage long term vacancies There was also discussion about taking a more active role in business attraction and pop-up shops in the downtown.
- **Downtown Stakeholder Considerations** – There were a number of opportunities or considerations related to specific groups in the downtown:
    - **Major developments** – Downtown London could take a leadership role in creating greater collaboration between 'anchor' developments such as the Budweiser Gardens, convention centre, market, library, museum and the LDBA members. Representatives from these anchor developments were in support of attending meetings of the anchors hosted by Downtown London. Several referenced earlier successful efforts when

[1] The City currently does not have any data that distinguishes between parking usage by downtown workers and those visiting or shopping in the downtown.

Downtown London businesses had collaborated and leveraged anchor events and programs.

- **Arts and culture sector** – Downtown London is the core of an arts and culture district. There is great potential to leverage arts and culture as an economic development driver. Arts and culture contribute to the vibrancy of the downtown and counter the negative impacts of the social issues.
- **Office workers** – The demand for office space post COVID-19 is unclear but many expect it to decrease with greater adoption of remote working for many downtown offices. There will be a need to create public spaces where office workers feel safe. Activation, especially in the transition time immediately after office hours, will help to encourage workers to remain downtown to shop and dine.
- **Residential development** – Many recognized the opportunities resulting from increased residential development in the downtown. They saw a role for Downtown London in supporting the residential developers and creating an inviting atmosphere to support resident attraction efforts. They also saw a need for an association to provide a voice for residents and ensure their needs and concerns are addressed.
- **Stores and restaurants** – These businesses have been seriously impacted by COVID-19. Businesses will need assistance with business plans, hiring and other human resources issues. They will also need to rethink their business models to balance store-front, and E-commerce sales and services as the economy re-opens.
- **Post-Secondary Education Connections**– Fanshawe students can be a source of new customers, part-time staff and residents. Many programs in Fanshawe's downtown campus are related to careers in the arts and hospitality sectors. The large international student population (post-COVID-19) will also add to the diversity. Fanshawe is exploring a meal plan that could include downtown London businesses.

  Western University has also indicated interest in exploring a greater connection with downtown businesses and stakeholders.

2.2 City Council

One-on-one interviews were scheduled with the Mayor and members of Council. A total of 13 interviews were completed by Downtown London staff.

The following were the common themes throughout the interviews.

- **Downtown is a great asset -** There was generally great support for the downtown area which included the diversity of cultural, recreational, social amenities. Making downtown a great place to live, play and work was a common theme shared by all. The architectural mix of historic and new construction, anchor organizations, big employers and small business seems to be the desired result of all interviewed. The use of green space and trails throughout the city are identified as something to build on. Making downtown a destination of choice remained a priority.

- **Parking -** There is a diversity of opinion regarding the types, placement and accessibility of parking within the downtown area. While some believe there is sufficient parking that is accessible, others believe that some of the parking available may not be the best use of real estate. An overall parking strategy may need to be established considering all the downtown partners and be supportive of other plans currently in place. Some Council members highlighted the need to consider alternative modes of transportation, the centrality of a transportation hub and its impact on parking.
- **Safety and Social issues** - There is unanimous support to address social issues in the downtown. This included homelessness, mental health and addictions, housing needs, and poverty. The safety and security of people in the downtown was also highlighted as an issue of paramount importance. Councilors were able to identify the impact of these social issues on the general perception and comfort by those who either live and work downtown or who chose not to come into downtown as a result of the fear they experience. This in turn has had and will continue to have an impact on the businesses and merchants in the downtown core. Many highlighted the location of Citi Plaza and the services located within that building as a contributing factor. Some councilors indicated that the implementation of the CORE Action Plan might be a place to begin. The impact of COVID-19 has highlighted an already problematic issue.
- **Housing -** While many councilors support the need to have people live and work in the downtown, the exact type of housing required is less clear. While there is support for the development of high rises, some also suggested a need for mixed residential. It was suggested to consider using the University as a planning resource. Some highlighted the need for additional amenities including a downtown grocery store, a variety of transportation options to move easily in and out of the downtown and greater shopping options.
- **Downtown development -** A push for reducing the number of vacant store fronts remains on all councilors agendas. They discussed several options to fill vacant stores including increased public/ private partnership, reviewing development charges, zoning changes, removing incentives for downtown ownership of vacant building and a review of development charges. The Councilors recognize the significant financial impact of filled commercial buildings makes and as a result, this issue is a significant priority. Any master plan should include all stakeholders as well as those who reside outside the downtown.
- **A new vision for Downtown** -The need to establish a new vision for Downtown London was a common theme. Many mentioned the need to include all stakeholders and partners and ensure that there is a common vision that is well supported, well communicated and forms the basis for future planning and decision making. There needs to be a renewed emotional tie to downtown by the community at large and the businesses both large and small that are part of the downtown. Creation of the "downtown identity" will be a valuable communication, marketing, recruiting tool moving forward.
- **Partnerships and collaborations** – Another strong theme was the divisiveness within the Downtown London board and between its members. The Board and its members must find common ground and align their strategies into a common vision. If Downtown London provides a

unified position, Council will be able to assist them. Everyone will benefit with the establishment of a collaborative, coordinated plan to create synergies between DTL, City Council and other partners based on positive outcomes.

- **Roles and responsibilities-** Council members said that the clarification of roles of the DTL, City staff and Council was needed. Several Councillor and the Mayor indicated that are not always aware of what Downtown London does. They said there could be opportunities for the board chair, and executive director to have more regular meetings with the Mayor and provide an annual or semi-annual report to Council beyond the AGM report. They suggested that city staff have meaningful conversations with Downtown London. Building a true partnership will require significant and timely discussion of common issues and strategic priorities for all businesses and organizations.

- **COVID-19 Impacts** - The COVID-19 Pandemic has significantly impacted the downtown. Understanding the specific impact to the businesses in the downtown will help to create the most appropriate recovery measures. The recovery will provide an opportunity to revision reimagine the downtown with new ideas. They recommended building a strong relationship with the Economic Impact and Recovery Task force.

3 Focus Groups

A variety of focus groups were held as part of the stakeholder engagement plan for the Downtown London Strategy. The consultation started with the first meeting of the Boards and Advisory Committee. A focus group with Downtown London staff ensured that their insights contributed to the strategic planning process.

The LDBA and MSL boards met for a focused discussion on Downtown London's governance. The boards and advisory committee also met to discuss the vision and strategy for the organization. Downtown London also hosted a focus group in cooperation with the London Arts Council to explore opportunities to foster greater collaboration between the arts and culture organizations and businesses in the downtown and Downtown London.

A summary of the various focus groups continues in the section below.

3.1 Project Initiation

The consulting team met with 20 respresntatives from the LDBA and MSL boards, the project steering committee and Downtown London staff on March 2, 2021 to launch the strategic planning process. The goal of this meeting was to confirm the project objectives and workplan. It also provided the participants with an opportunity to share their initial thoughts and desired outcomes of the Downtown London Strategy.

The participants were asked to provide their vision for the Downtown London strategy

A summary of their responses is included below in three categories: overall vision for the strategy, how to conduct the strategic planning process and issues and actions to be addressed.

Vision for the Strategy

- To re-set our vision.
- To become more strategic; to become more pro-active, less reactive.
- To have direction for longer term recovery.
- To consider fresh ideas. A new vision, goals, a new way of doing business.
- To be better prepared for next "issues" that may come (COVID-19 and the like)
- To reimagine downtown with short, medium and long-term framework
- To build partnerships and break down silos.

How to conduct the Strategy

- Make the journey transparent and encompassing for all partners and stakeholders.
- Provide an understanding of why initiatives are being suggested.
- Learn from the global, progressive ideas from other organizations facing same issues as Downtown London.
- Think more globally in short, medium, and long-term stages.

Issues and actions to be addressed

- Placemaking – create a downtown that will attract people
- Define the roles of the BIA, the City and other stakeholders
- Determine the advocacy role/ objectives for Downtown London's relationship with the City
- Align tourism and Downtown London plans so that we can be good partners
- Engage new and existing residents to bring them downtown
- Address the security concerns in the downtown
- Establish measures and framework for tracking our progress and promoting our success
- Get more people on the street through events, promote walkability, bike routes and other means to come to downtown
- Address symptoms and underlying problems in the downtown
- Become advocates for positive living, outdoor/shopping/eating/arts & culture and build a community
- Expand the linkages with the consumer
- Build business diversity (in size and type) in the downtown to become more resilient
- Consider the Downtown's role in diversity and inclusion
- Leverage Fanshawe College opportunity, access to students, international students. Convert them into long term London residents
- Build communication and connections for all partners and stakeholders
- Re-vitalize downtown to support and attract tech companies and their employees
- Foster a vibrant downtown culture
- Establish measurement tools for Downtown London core, board and members
- Consider the future of London's office space and commercial real estate. How will we fill and re-genereate that space?

3.2 Staff Focus Group

A focus group was held on March 29, 2021, to gather input from the Downtown London staff. All Downtown London staff members participated in the one and a half hour Zoom meeting to hear about the strategic planning process and to share their insights with the consulting team. Discussions centred on the key roles of the LDBA, issues, the relationship of LDBA and Main Street London, downtown stakeholders, marketing and the staff vision for the future.

The summary of these discussions has been reorganized by theme area. The notes represent the input received and are not recommendations. The order in which they are listed does not indicate any recommended priority level.

Key Functions of the LDBA

The staff identified the following key roles for the LDBA:

- **Activation** - small-scale activity on downtown streets, events and promotions organized by the LDBA and support and sponsorship for large festivals organized by third parties.
- **Investment** - Investment attraction, business retention and expansion into the downtown
- **Marketing and communication** - promoting the district and providing media relations for Downtown London
- **Member Services** - member communications, guidance and problem solving for members, advocates for merchants, community partners and general infrastructure in the downtown, financial resources (grants) for members, liaison for members and funding and support programs and regulations
- **Public safety** - liaison with police services, social agencies
- **Beautification** - planters, seasonal décor, murals, graffiti abatement and cleanliness

Issues in the Downtown

The staff spoke of several issues that are impacting their ability to achieve their goals:

- **Public safety and street behaviour** – increasing crime and vandalism, lack of traffic to discourage undesirable behaviour
- **Relationship with the City** – limited or unsatisfactory coordination and communication, limited follow through, expectation that BIA is responsible for everything downtown
- **Changes in office & retail landscape** – COVID-19 lockdown and physical distancing measures, competition with online shopping
- **Parking** – consumers and members unhappy with location, cost and enforcement of parking
- **Negative media**– negative bias of downtown by media, LDBA members who actively engage media on negative issues
- **Size and diversity of LDBA members** – differing opinions on the role of the LDBA, hard to support so many members, different needs of different members/districts, members' support needs require high touch, businesses need help developing skills & facing strong competition
- **Lack of data** – need to better understand downtown shoppers, etc.
- **Development/ investment** – persistent vacancies, property owners, new residential development under threat
- **Nostalgia for the past** – residents wish to return to a past that is unattainable

Main Street London (MSL) and the LDBA

- **Role of Main Street London**
  - The role has evolved over the years. The staff discussed the Municipal Act directives and how it has impacted Main Street London and the LDBA functions.
  - The organization's diminished responsibilities have left some board members frustrated and questioning the need for the organization,
  - MSL members provide an important community engagement role
  - MSL board doesn't have the same potential for conflicts of interest as LDBA members

- **LDBA influence**
  - Main Street London board members are not all LDBA members, some LDBA members has expressed dissatisfaction with non-LDBA members overseeing the grant programs.

Key Downtown Relationships

- **BIA Meetings** held every month
- **City of London**
  - The formal relationship with one staff and one Councillor on the board
  - Staff have ad hoc meetings with various City staff but no one key person
  - An MOU with the City could provide greater understanding and support?
  - Interact with roads & transportation, waste management, planning office, parks & recreation, operations, neighbourhood services, bylaw & parking enforcement, communications, city economic development staff
- **Economic Development Stakeholders**
  - LEDC, Small Business Centre, Tourism London, Fanshawe College
- **Police**
  - Increased police presence in the downtown due to increased crime
  - Police provide downtown foot patrol
  - LDBA has ongoing meetings with Chief
- **Social agencies** - 519 pursuit, Youth Opportunities Unlimited, Addiction services, Health Unit, Crisis Informed Response
- **Downtown Anchors** – RBC, Public Library, Budweiser Gardens, Covent Garden market, Grand Theatre, London Arts Council, London Music Office
- **Downtown Developers**
- **Greater connections needed with:**
  - Western University
  - Residents
  - Western Fair – to explore opportunities for mutual support

Downtown London Vision

The staff was asked to describe how things would be different in the future if the strategy and implementation plan are successful.

- **State of the downtown**
  - There will be more full storefronts and less vacancies in the downtown
  - There will be a new mix of businesses in the downtown
  - Lots of movement on the streets
  - Everyone will feel safe
- **Governance**
  - There will be more strategic discussion at the board level
  - The board will be working in the best interest of all – conflicts of interest will be recognized and addressed
  - Discussion will focus on what the LDBA needs – less parochial thinking
  - Richmond Row and LDBA core will work collaboratively
- **Shared understanding**
  - Clarity on who does what (esp. LDBA and City responsibilities)
  - Mutual understanding with partners on the definition of success
  - Meaningful relationships with City and other partners
  - LDBA recognized for its hard work, value of the LDBA,
  - Members and board more trusting, less adversarial
  - Harmony with members, City, partners
  - Common goals
  - Understanding that downtown belongs to everyone
  - Citizens & London residents understand role of Downtown London
- **Relationship with City**
  - The City will have clearly stated strategy for the downtown which aligns with the Downtown London strategy. Actions will be more strategic and reactive
  - Strong relationship with City Council – greater understanding of importance of the downtown
  - Formal understanding of the relationship with the City
  - Shared accountability, roles, goals & responsibilities, MOU in place
  - More meaningful collaboration with City
  - Make the health of the downtown part of the City's performance measures
- **Business approach**
  - Cool new business models
  - Innovative and forward-thinking approach
  - Openness to change
  - Better change management

Marketing

Staff discussion focused on the targets for downtown, marketing themes and messaging.

- **Marketing Targets**
  - Clarity of the new targets

DOWNTOWN LONDON RE-IMAGINED

  - Opportunity to rethink and align our targets (e.g., office workers) and campaigns to speak with them
  - Need to determine who shops downtown and what they want
  - Need to pick the key targets – needs to be intentional
  - Will need to have agreement with businesses of who we want to attract
  - Focus on who we can influence – seek out the champions
  - Focus on who will love who we are authentically
  - Tap into a younger generation (e.g., adventure seekers – use psychographics)
- **Themes**
  - Marketing the destination – the value of the entire area
  - Address common interest of the targets
  - Downtowns offer high end and low-end experience at the same time
  - Support all the issues and activities of the LDBA
  - Need to be visible doing our job (e.g., cleaning downtown, addressing graffiti)
- **Messaging**
  - Need to provide honest picture of the downtown - believability
  - Must manage expectations
  - Match the experience in the downtown with what we say

Final Thoughts

The staff was then asked to provide any additional thoughts of the development of the Downtown London strategy. The key themes are listed below:

- **Looking to the positive**
  - Staff would like to move forward in a positive way. It is easy to get stuck in the negative. Staff should make the strategy focus on the positive experience
- **Downtown London has made a positive impact**
  - DL has lifted up so many businesses and new entrepreneurs. Everyone benefits from this success
- **Focus**
  - We need to narrow the staff and board focus
  - We should not try to be everything for everyone
  - Downtown London is bridging a lot of gaps that others should be doing – especially the City
  - How can we get others to fix their processes and fill gaps?
- The strategy should be **realistic and achievable**
- Downtown London needs **metrics** to measure its progress
- Staff shared the role of a BIA according to the Province:
  - A local municipality may designate an area as an improvement area and may establish a board of management, (a) to oversee the improvement, beautification and maintenance of municipally owned land, buildings and structures in the area beyond that provided at the expense of the municipality generally; and (b) to promote the area as a business or shopping area. 2001, c. 25, s. 204 (1). https://www.ontario.ca/laws/statute/01m25

3.3 Board Governance Focus Group

The LDBA and MSL board members met on May 17, 2021, to discuss the role of governance in the effective management and operation of Downtown London.

For the purposes of this focus group, governance was defined as follows:

- The act, process, or power of governing
- Decision making processes in the administration of an organization
- A structure that, at least in theory, works for the benefit of everyone
- A structure of relationships and processes to direct and control the enterprise in order to achieve the enterprise's goal

The consulting team also summarized the current responsibilities of the two boards

London Downton Business Association	Main Street London
• Finance administration & member services • Business attraction, expansion and retention • Marketing and communications • Placemaking and community liaison • Business liaison	• Investment incentives (grants and loans)

The participants also reviewed the responsibilities of the board and executive director.

Board	Executive Director	Results
Defines Expectations	Communicates Expectations	Stakeholder Expectations Met
Grants Authority	Implements	Effective Quality Programs
Verifies Performance	Reports Performance	Compliance with Requirements and Regulations

Downtown London Constituents

The focus group participants were then asked to identify their constituents. The list is summarized in alphabetical order below:

- Businesses
- City Hall
- City of London residents
- Customers and clients
- Developers
- Downtown businesses
- Downtown residents
- Employees of members
- Executive Team
- Investors
- LDBA levy payers
- New businesses recruits
- Office Workers
- Property owners/ landlords
- Students
- Visitors to London

Board responsibility

The participants were asked to define the most essential responsibility of their board. The answers are summarized below;

- Ensure fairness, ethics, governance and responsibilities to our the membership and London
- Ensure outstanding communication
- Ensure policies are being followed and adapted as we evolve
- Fiduciary responsibility of the members levy
- Good Governance
- Keep the members happy (demonstrate value for members)
- Serve our membership, creating endless opportunities and introducing effective initiatives for the prosperity of existing and potential new members and downtown
- Set direction and expectations
- Stakeholder accountability
- Use resources responsibily to improve the quality of the downtown
- Establish the vision

The participants were then broken into three smaller groups where they could discuss Downtown London's governance in more detail. The following is a combined summary of the three small groups' discussions.

Main Street London's Role

The participants were asked to discuss how Main Street London could support recovery and downtown investment.

Main Street London responded to the pandemic by diverting funding from invesment incentives to COVID-19 relief funding for local businesses. This funding was very much appreciated and helped sustain many downtown businesses.

The vision for MSL in the long term was less clear. Some questioned the effectiveness of incentives that overlap with the City of London's CIP program. Others felt there should be a clearer separation between the LDBA and MSL. Several stated they would like MSL to focus on larger investments and developments such as Budweiser Gardens and the convention centre with façade grants as just one effort employed to foster invesment.

Some suggested that MSL could become active in acquirig vacant properties in the downtown to ensure they are repurposed and marketed to support new business activity. MSL's efforts in the downtown would counter those of some developers who have employed a buy and hold model to downtown commerical property. This strategy is decreasing the number of available properties for new and expanding businesses and creating a drag on the overall vitality of the downtown. Main Street Lonodn could access funds not available to the City of London which would support strategic land acquistion and property redeveclopment.

The participants contemplated expanding the MSL geographic boundaries to include other BIAs in London. They saw an opportunity to seek additional federal and provincial funds to support invesment in the downtown.

The role of Downtown London

The participants were asked what actions or efforts would be more effective if delivered under Downtown London. They noted that there was much confusion in London about MSL's operations and how it differs from the LDBA. Currently the LDBA is the sole funder of MSL.

The participants agreed that the LDBA should narrow its focus to BIA activities. It is harder to convince small levy payers to pay for investment attraction efforts. They want more ground level efforts that support them.

Some felt that if MSL was to broaden its mandate and its funding base it could also expand its efforts to include investment attraction and resident attraction. Currently MSL is not funded or equipped to take on this responsibilty.

Board activities

The participants were asked to describe the board they would like to be by detailing the things they would like to stop doing or do less and those things they would like to start or engage in more. The following table provides a summary of their responses.

Actions to stop or do less	Actions to start or do more
• Leading the safety and security activity • Paying for members' PPE • Investment in individual businesses with levy money • Combining MSL and LDBA agenda • Tactical COVID-19 response – time to become more strategic • Taking on City responsibilities • Getting heavily involved in BIA operations	• Speaking with one voice • Take on greater advocacy role especially related to safety and cleanliness • Use board members to support advocacy • Provide specific tasks for ED, board • Get downtown 'heavy hitters' more engaged • Collect more data to help inform decisions and support advocacy efforts • Consider re-branding – Downtown London name adds to the confusion • Be more involved with the membeship • Commit to transparent operations – show rationale for decisions • Provide more feedback, connections with the City • Consider service agreements • Focus on bold strategy direction – leave implementation to staff • Communicate better ouside LDBA membership

The particicpants were asked to consider what they would like to leave as a legacy as a member of the LDBA or MSL board. The responses are summarized below in three categories: their vision for the future of the organization, action-oriented objectives and the individual board member's role.

What do you want your legacy to be from your time on the LDBA/MSL board?	
Future State/Vision	• A prosperous and vibrant downtown that has become the city's and region's prime business and leisure destination • Strong vibrant safe business district that all of Londoners use and enjoy
Action oriented	• Strong ethical organization that will enhance the downtown vibrancy • A clear long term vision, executed with a sound strategic plan and monitored regularly through concise metrics. Challenging orthodoxies and being bold, especially in light of the pandemic's massive impact on traditional downtown workplaces • Establish clarity on the two organizations, and create a path that both can robustly fulfill their respective mandates • Assist in the transition of MSL to a City wide driver of the Economy. • Strong foundation for growth and prosperity

Board member role	• Communicator –(with members, stakeholder groups) • Successfully pivoted the organization from tactical response to a more strategic vision -- delivering plinth for DTL growth / recovery • A steady hand on the wheel during a time of great disruption • Turned things around and revitalized downtown

3.4 Downtown London Strategy Focus Group

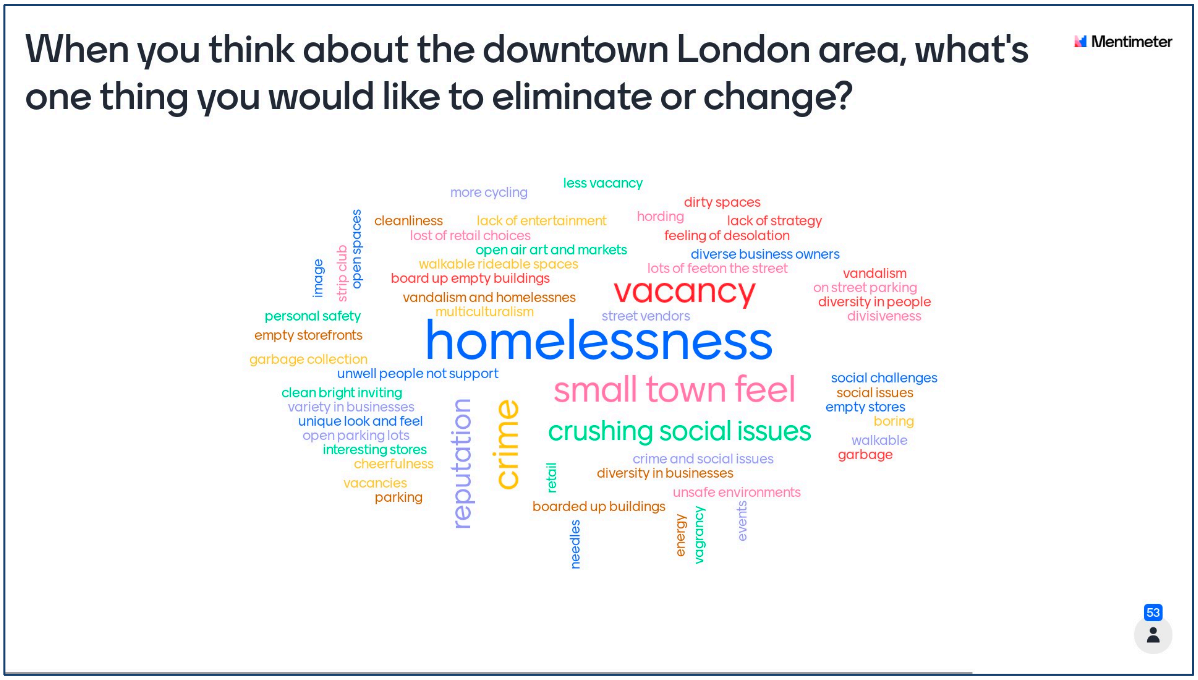
On May 28, 2021, Downtown London hosted a focus group to discuss the organization's strategic direction. In total, 25 people, plus staff and the facilitators, participated representing the London Downtown Business Association, Main Street London, the Strategy Advisory Committee.

The focus group began with a presentation on BIAs' mandate as outlined by the Province of Ontario, trends and best practices in BIAs and some preliminary economic and demographic analysis highlights.

The participants were then asked to share their insights on a variety of questions related to the Downtown London's strategy.

When asked about what they wanted to maintain or save in downtown London, patios and live music were the most popular choices. Other popular messages were the heritage buildings and streetscapes, the commercial employers and employment base, entertainment, events and culture were all references.

When asked what they would like to eliminate or change, the answers were more definitive. The social issues facing the downtown were clearly represented, aligned with crime, cleanliness and reputation. Vacancy and boarded up buildings were also referenced. Small town feel was a prominent choice, upon further disucssion, the participants reported that it related to a desire to go backward to the way things used to be and no support for a bolder vision for the downtown.



The participants were then asked to think about desirable characteristics that Downtown London could aspire to, in order to create a desirable locacation to live, work, shop or visit. This list included a welcoming environment that supports diversity in business, resident and visitors, events and activity, green and open spaces, intersting stores, more foot traffic and an exicitng place to be.

Think about other downtowns around the province. What characteristics makes them more desirable to live, work, shop and visit than Downtown London?

- A place for all. Professionals, members of our city, students, teens, and visitors
- Activation of riverfront
- All of the buildings are being developed and used
- Always something interesting and entertaining happening.
- Cool vibe, always something to do
- Diversity in businesses, business owners
- Easy to walk around
- Interesting stores
- Lots of feet on the street
- More walkable, youthful, events, music
- Not dominated by cars. Not a thruway but the destination
- Open spaces, greenery
- parkland / open space. wide sidewalks - places to sit
- Safe, convenient, vibrant, cool, fun
- Safer, cleaner, more desirable shops, grocery store, unique stores/restaurants. Vibrant, Exciting, A Place To Be In!

- Street activations that limit or eliminate cars. Diversity of activities and places to sit and enjoy what's happening
- Strong attraction anchors
- Unique look and feel
- Unique shopping, fun, vibrant, modern, trendy
- Walkability. Close proximity of dining/patio, theatre, riverfront, shopping, cool vibe.
- Wonderful diversity of shops

Issues and Opportunities

The participants were asked to consider the issues and opportunities that must be addressed to enhance Downtown London as a place to live, work, shop and visit.The following is a summary of the discussions.

Safety and Social issues - Safety and mental health issues were overriding concerns for making Downtown London a desirable place to live, work, shop and visit. The presence of a large number individuals dealing with homelessness, mental health issues and addiction is impacting Downtown London's potential for residents, workers, shoppers and tourists. It is also impacting employers' abilty to attract and maintain workers. One group stated that it was not the BIA's job to police the situation. They did suggest that the BIA play a role in quantifying the size and nature of the problems to advocate for support and further measures to address this complex issue.

The following section provides a summary of the considerations to enhance Downtown London as a place to Live, Work, Shop and Visit

Live:

- Safety
- Create an attractive image
- Infill strategies with less parking lots and more building
- Consider more student housing – student housing is needed to support the growing Fanshawe campus
- A better mix of housing is needed to meet needs of students, proesssionals and retirees
- Need more discussion on family living in the downtown
- Change the reputation
- Target a grocery store, larger stores to fill all resident needs
- Work with our critics – address myth busting
- Create a vibrant downtown – instagrammable – with more of a cool factor
- Downtown rents are too high for many young professionals
- Green spaces and access to green spaces is important for apartment & condo dwellers

Work

- Safety – a lot of dark spaces
- Safety concerns affecting workers spending in restaurants, some do not feel safe on the bus
- Recognize difference between general parking and reserved parking for employees
- Parking affordability and walkability an issue for employers

- More flexible workspaces, spaces for team meetings, get tothers a variety of flexible options, convention space
- Imporve cycling options, other public transportation
- Availability of services and support after 5pm. – need to provide incentives to encoruage workers to stick around
- Need to help employers by making downtown a place people want to come to work
- Employers don't see downtown's competitive position
- Construction doesn't help

Shop

- Expand diversity of retailers
- Downtown has high and low end - middle ground is at the mall
- Create cool, intresting divers exeritences for shoppers
- Experiential shopping and persoanal services
- Link enterntianment, restaurants
- Customize message & marketing to the target audience
- Transportation is quite expensive – not enough people use the transit system
- Tell the story of the personal tourch in downtown – you don't get the same experience at the mall
- Higligh the uniqueness of shop and entrpreneurial ventures
- Grow E-commerce capacity
- Need mmore flagship retailers
- Better parking options
- Create identities within the BIA
- Encourage retail, service clusters within the BIA

Visit

- London is the largest urban area in SW Ontario – message should be we offer so much that you can't get elswhere
- Everyone should feel welcome – including cars
- Need more flexibile parking –Need to provide for quick in and out visitors and long -term
- Need safe & secure cycle parking
- Tell better stories about the downtown
- Make it easier to set up events and festivals
- Rentals, insurance and safety concerns making it harder

Key Actions

The participants were then asked to discuss the actions that LDBA and MSL should take in the next five years. The results are summarized below:

- Programmming key to next steps – need a diversity of evennts – major ones and smaller every day and evening activities on a daily basis
- Beautification, marketing and promotion are our core responsibilities
- Support target marketing

- Improve how people get to downtown and how they can get around once here
- Get storefronts filled
- Make downtown investment-ready. Why would people open a retail shop downtown. The BIA and City need to create the investment ready case. Have data avilability
- BIA in a police security role and are not equipped to handle these issues – get retailers and owners involved by keeping lights on security washrooms
- Put artwork in the windows of empty stores
- Address empty properties. The City has more authority to urge development
- Make the case you can do/find anything downtown within a short walk
- Transit – a downtown loop bus – e.g. downtown bus in Cleveland
- Adjust parking policies in specific circumstances – monitor and get data to inform future decisions
- BIA should have positions on municipal decision making on parking lots, vacant buildings
- Safety issues must be addressed – keep advocating to allow commerce to thrive

3.5 Arts & Culture Focus Group

On June 9, 2021, Downtown London and the London Arts Council hosted a focus group of individuals active in the arts and culture sector to explore the opportunities for greater or more meaningful collaboration between the arts and culture sector and Downtown London. In total 11 people took part, representing various cultural operations, artists, the London Arts Council, Downtown London and others.

The focus group began with a brief overview of the strategic planning process and highlights from earlier stakeholder engagement exercises. The group reviewed the components of a SWOT (strengths, weaknesses, opportunities and threats) analysis to ensure a common understanding of the framework for the focus group discussion.

The participants were asked to share their thoughts on the strengths, weaknesses, opportunities, threats and opportunities related to arts and culture in Downtown London. They were then asked to describe their vision for the future of arts and culture in Downtown London and the actions needed to achieve the vision.

For this exercise, the definitions of strengths, weaknesses, opportunities and threats follow:

Strengths	(Positive, Internal): Positive attributes or assets currently present in Downtown London that give a potential advantage over other similar organizations
Weaknesses	(Negative, Internal): Local issues or characteristics that limit the current or future growth opportunities for Downtown London.
Opportunities	(Positive and External): Trends the Downtown London could leverage for local benefit.
Threats	(Negative and External): Trends that threaten Downtown London's future.

A summary of the participants' responses follows:

Strengths

- Anchor institutions, quality venues of varying sizes and functions
- Established art galleries
- Great restaurants in proximity to cultural venues
- Ability to attract and house massive arts and culture events
- Diversity of arts & culture delivery
- Variety of venues from the very large to more intimate
- Quality venues (indoor and outdoor)
  - Budweiser Gardens, Convention Centre, Covent Garden Market, Grand Theatre, Dundas Place, Victoria Park, museum and many more)
  - Variety of music venues within walking distance
- Opportunities for post-secondary collaboration, education spaces
- A lot of arts entrepreneurs - individually owned businesses
- Outdoor assets – the Forks, river walks, gorgeous outdoor walks and bike trails
- Downtown hotels allow arts patrons to spend time at arts venues
- London is on the map – e.g., SunFest Arts history Paul Peele, Banting House
- Success with previous activations through Arts Council - London Arts Live - not just music
- Walkability – It's possible to enjoy multiple events and activities in one visit.
- The river plays a significant role in downtown- lots of history and mythology
- A cultural hub for Southwestern Ontario
- Variety of building forms – not all high towers add to the interest in the downtown

Weaknesses

- Drugs, homeless population, and safety concerns- huge hurdle to feeling safe and welcomed in the downtown. spaces between the cultural assets are not pleasant
- Social challenges - divide between public and private property - who is responsible for safe keeping of those properties?
- Social challenges impacting cultural activities (e.g., needles in public spaces, people yelling and disrupting performances)
- Lack of representation of culturally diverse groups or organizations in the downtown
- No overarching strategy to support arts and culture collectively (e.g., mural program lacking overall theme, maintenance program)
- Not taking advantage of London's student population and the night life economy
- Parking is difficult – perceived as a struggle with how to pay and when to pay
- Lack of coordination - Maintenance and support around cultural activities required
- City streets are not welcoming – spaces between the cultural assets are not pleasant
- Vacant buildings take away from the downtown streetscape
- City of London rules that restrict vibrancy of the downtown
- Collaboration between the City, property owners and the arts and culture sector is missing
- Lacking infrastructure for live events - need 66% agreement to close City streets for activations/festivals

Weaknesses

- Lack of coordination between larger events and other smaller potentially complimentary activities
- Missing some fundamental things like rehearsal spaces due to price point and zoning
- No musical instrument/supplies store - example of things that support culture
- Affordability of gallery space
- Limited funding for London's Arts and Culture Plan
- Bigger cities have higher end versions of grocery and liquor stores which adds to the experience downtown
- Weak connection to the Thames River

Opportunities

- London's application for UNESCO City of Music designation (collaboration with London music office)
- Council approval for music, culture and entertainment district in the downtown
- Opportunity to participate in building the City's music plan
- COVID-19 recovery - funding for programming post-COVID-19. Gradual opening will create an opportunity for London residents to rediscover their own backyard and then share with visitors and guests
- Greater interest and priority to reflect diverse ideas and faces in the community
- Opportunities for Downtown London, Tourism London and the Arts Council to partner for City funding programs, including the London Community Recovery Network.
- Provincial incentives for tourism activities will encourage tourists to spend money in London's arts, culture and tourism businesses
- 2021 Canadian Country Music Awards in the Fall of 2021 will help arts and culture venues and raise the profile of London's arts and culture scene
- Transition to online cultural activities during COVID-19 has expanded the offerings and reach of arts and culture organizations – can integrate online experiences with activities in the downtown.
- Participation in outdoor activations in Dundas, Victoria Park and other venues outside the peak summer months during the pandemic. Shows people will participate in events throughout the year
- Residential development in the downtown – new opportunity to engage with the property developers and the new residents
- Cultural organizations outside the downtown may welcome collaborations with downtown cultural organizations
- A lot of vacant space that could be used for cultural hubs and rehearsing.
- Ability for Fanshawe students could grow careers downtown after graduation
- Existing or new Incubator centres, accelerator centres could be developed to support arts and culture growth
- Opportunity to expand on the indigenous history and stories related to the Thames River

Threats

- Mental health, homelessness and addiction is escalating - Creatives and the public do not feel safe and a barrier to cultural activity and attracting visitors to the downtown.
- Not all cultural businesses will survive the economic impact of COVID- 19 which will impact the diversity of the arts & cultural assets
- many cultural workers left the sector due to COVID-19 - may be hard to find cultural workers, artists post COVID-19
- Western bubble - difficult to get students to engage with activities and programs downtown.
- Governments will need to address looming debt post COVID-19 - potential governments will reduce funding to arts & culture.
- People have established new patterns during COVID-19 – may not be interested in coming back
- Competition from elsewhere in London with cultural and activity venues, restaurants and galleries with free parking and ease of access
- Physical distance a challenge e.g., tours on narrow sidewalks, lower occupancy numbers for performance spaces
- Restrictions on arts funding – limitations on the support of private arts businesses
- Economic impact of COVID-19 - Will former customers/ patrons have the disposable funds for arts and culture
- Impact of COVID-19 on funding agencies – will they have the funds to continue to support
- Safety concerns –will people feel comfortable coming back into spaces with others?
- London's Asian and Muslim communities are not part of the downtown conversation
- Property owners not flexible on leases for arts and culture tenants

Vision for Arts and Culture in Downtown London

The focus group participants' vision of arts and culture in Downtown London includes a variety of cultural activities in the core. There is always something to see downtown. Each building has something unique to offer.

Visitors take delight in coming downtown. Eating, drinking, and shopping are layered with cultural experiences. Visitors wander in and out of the shops and galleries. There are people on the streets, sidewalks, in the parks and institutions. Stores are open, accessible and full of people. Flex space is available for musicians and artists to rehearse, perform and create at affordable rates.

In this future state, arts and cultural organizations and downtown businesses collaborate on programming that contributes to a vibrant downtown and attracts people to the downtown core. The cultural anchors, activities and related businesses all contribute to a pride and excitement in the downtown. There is broad representation by a diverse collection of cultural and heritage organizations.

Community access and communications are working effectively. It is easy to learn about all the things happening downtown. There are activities planned year-round and even patios are open in the off-season. Small organizations are engaged in the arts and culture scene and individual businesses align their offerings with the cultural activities and experiences downtown.

Downtown's image has been rehabilitated and people feel safe. Individuals facing social and mental challenges can access the supports they need. Previously distressed areas in the downtown have been rehabilitated and are reinhabited. Downtown London's image and cultural scene contributes to the City's efforts to attract conferences and corporate events.

Downtown London is a place to go for children, with lots of family experiences. Teens enjoy the cool atmosphere and stores targeting their interests. Breweries and niche businesses appeal to young professionals. The transit system supports easy access from across the City. Downtown London offers experiences, a vibe and energy for all demographics.

Building the Future Together

The participants suggested a variety of actions for Downtown London and the arts and culture community to support the vision.

Communication was identified as an important factor in sharing the vision of arts and culture in Downtown London and getting stakeholder buy in and support. The vision should be shared widely. There should be one information hub that connects culture to the residents and businesses in the downtown. They would like to highlight things that are going well, both big and small. They recommended harmonizing competing events calendars and sharing communications resources to create greater awareness and help people pre-plan their time in the downtown.

They suggested 'conscious collaboration' where interested parties work toward common goals and shared communication with greater connections between the arts and culture community, businesses and residents. Arts and culture organizations should align their efforts and support each other. Key stakeholders should meet to review, plan, build on and collaborate on larger events.

There was discussion on audience redevelopment, targeting specific sectors and demographics with targeted initiatives including landowners, families and teens.

They want to work with landowners to address the vacant and missing pieces in downtown. They would like to encourage or incentivise owners to provide opportunities for youth and cultural sectors. They would like developers to become more engaged in creating a better London and become ambassadors for the arts and culture sector.

They suggested engaging teens as the next generation of arts customers and patrons. They recommended providing places and spaces for teens downtown and funding activities that appeal to teens. The participants also recognized teens' role as an emerging workforce, many with first jobs in arts and cultural organizations in downtown London.

They recommended developing maps and itineraries, defined by personality types or favourite activities, to help visitors to plan their time downtown. They would like to host events modeled after Door Open to encourage more visits the downtown. They were encouraged by the recent establishment of ambassadors to help visitors navigate downtown and find out what's going on. They also suggested offering free parking on Saturdays.

They recognize a need for strong advocacy at all political levels to get longer term commitment and leadership on issues affecting the downtown. They want to get better at telling the story of the economic impact of the arts to get the attention of elected officials. They would like to greater access to funding, incentives and subsidies to better engage property owners.

They would like better communication with the City staff to assist downtown visitors with navigating construction and street closures.

They want to ensure there are programs and supports for individuals experiencing homelessness and other social challenges.

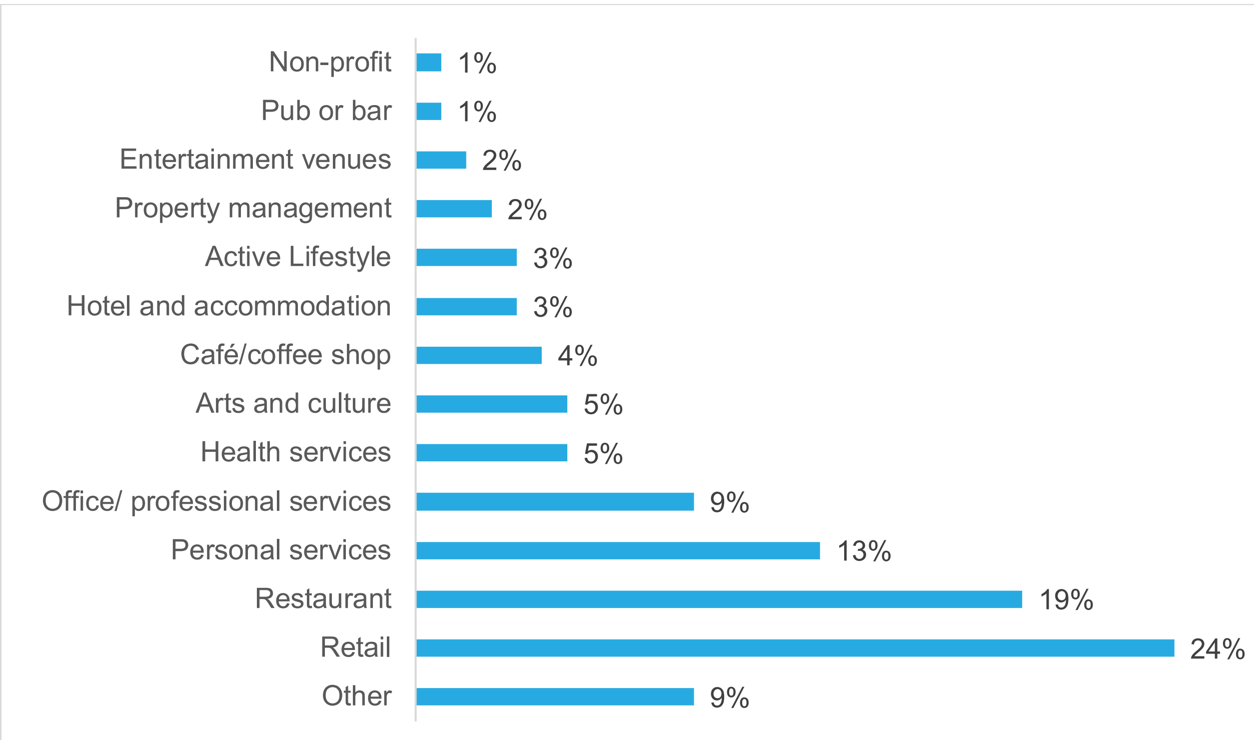
4 Business Survey

An online survey of the London Downtown Business Association members was conducted between May 5 and May 28, 2021, to solicit the member's opinions, insights and priorities for the effective operation of Downtown London and its efforts to create a strong and vibrant downtown.

There were 174 responses of which 66% were business owners, 17% were property owners and 18% were both business and property owners. Most respondents (90%) represented independent businesses. Almost half (48%) reported that their business had been in downtown London for more than 10 years with 12% operating for less than 2 years, 24% operating for 2 to 5 years and 15% operating between 5 and 10 years.

The largest share of respondents were from the retail sector (25%), followed by restaurants (19%), personal services (13%) and office/professional services (9%).

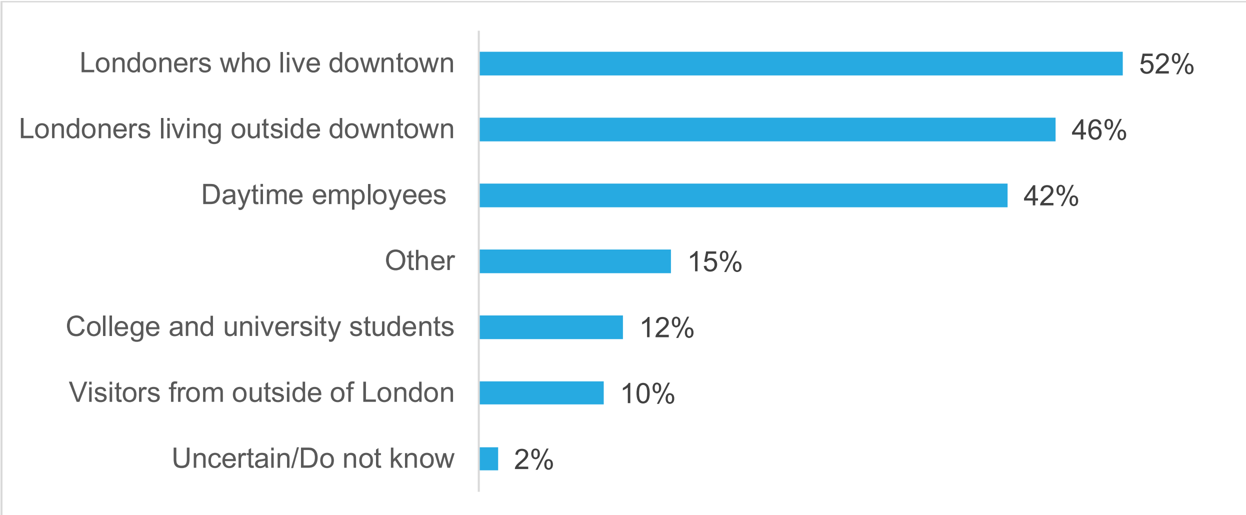
Figure 1: Business Q2: What business sector are you in?



N=124

The top target markets for the members were Londoners living in the downtown (52%) and outside the downtown (46%) and daytime employees (42%).

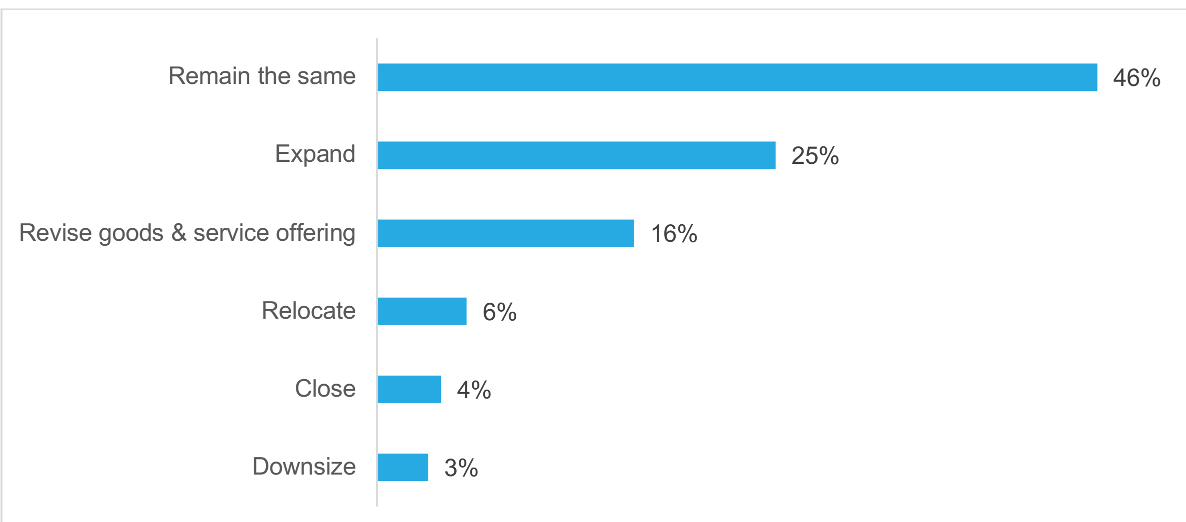
Figure 2: Business Q5: Please identify your top two target markets for your business.



N=130

The business representatives were asked to share their plans for their business in the next 3 years. Almost half (46%) planned to remain the same, with one quarter planning to expand. A combined 13% of businesses polled said they planned to either relocate (6%), close (4%) or downsize (3%). Of note, 16% of businesses said they intended to revise their goods and service offering over the next three years.

Figure 3: Business Q6: Within the next 3 years, which of the following do you plan for your Downtown London business?



N=123

The survey respondents were asked to rate the importance of a variety of factors on the success of their business pre-COVID-19.

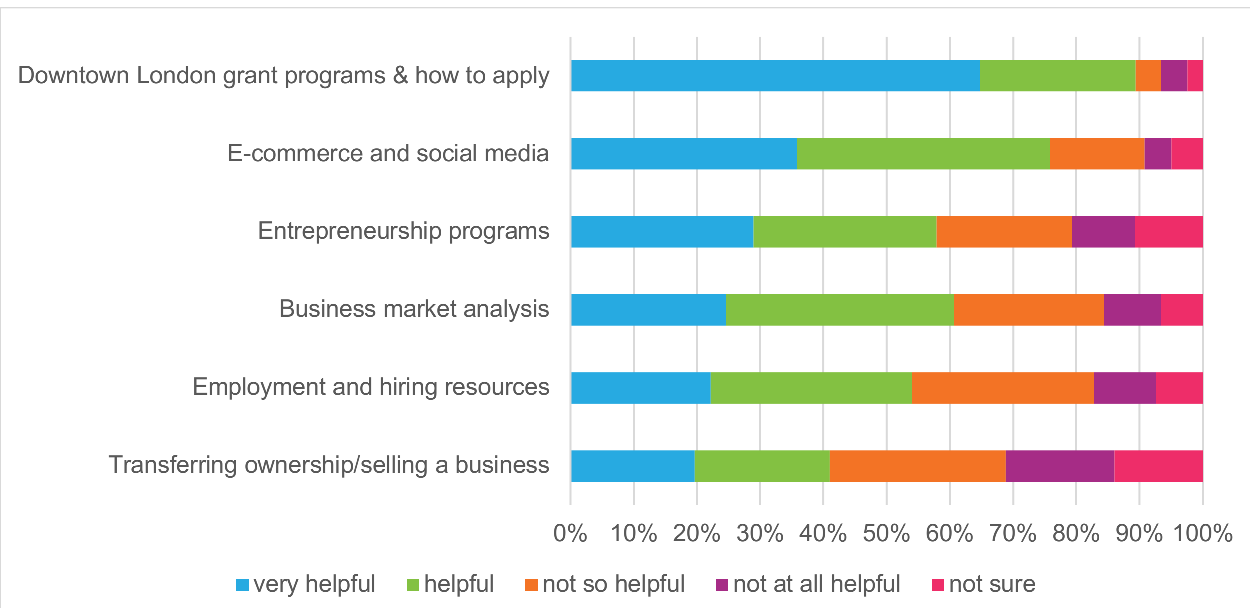
The three most critical factors, according to respondents were safety and security (87% very important), cleanliness (85% very important), attracting new business (73% very important). And parking (70% very important).

Almost half reported that beautification and physical improvements, downtown marketing and promotion and large-scale events were very important at 52%, 51% and 45% respectively. The respondents ranked other factors, in order of importance as follows: transportation options (41% very important), supports for existing businesses (40% very important), Downtown London hosted smaller events and activations (36% very important), wayfinding and directional signage (20% very important) and E-Commerce/online shopping (24% very important)

The respondents were then asked their opinion on the helpfulness of a variety of existing or potential programs to help growth their business.

The respondents were most favourable towards the Downtown London grant programs and information on how to apply. Assistance with E-commerce and social media was either important or very important to 76% of respondents. Entrepreneurship programs, business market analysis and employment and hiring resources were important or very important to 58%, 61%, and 55% respectively.

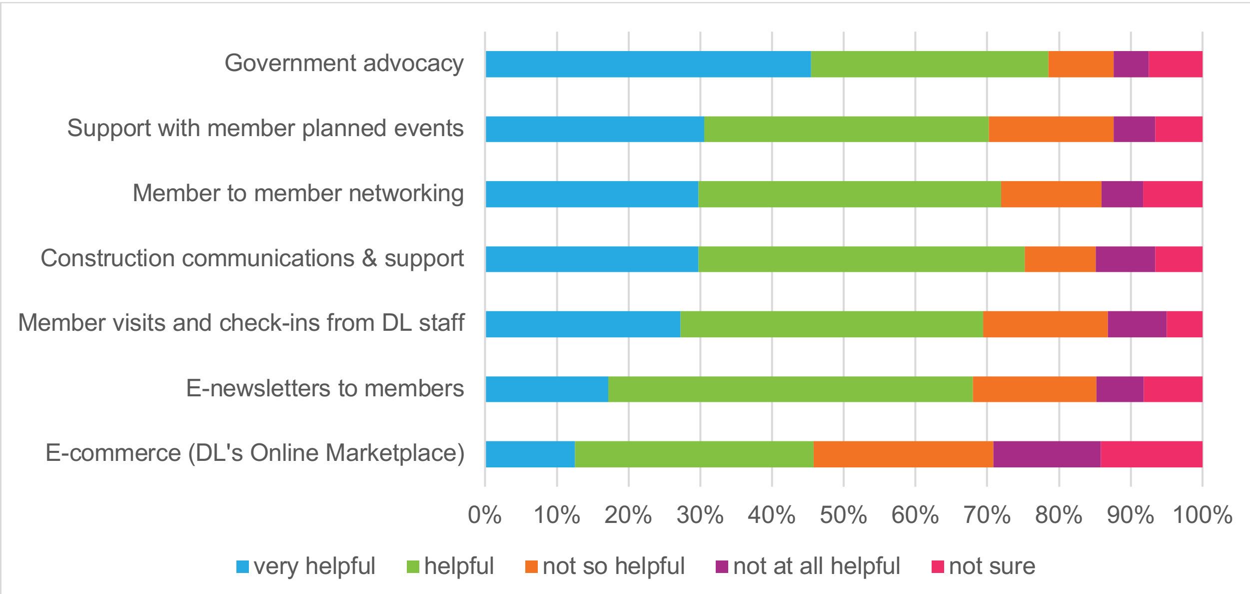
Figure 4: Business Q7: Business advice and consultation services. Thinking of the downtown prior to the COVID-19 pandemic, please rate the importance of the following factors in the success of your business.



N=123

The majority of members (78%) indicated that government advocacy would be very helpful or helpful. The members also provided high ratings for member planned events, member to member networking, communications on construction, visits from Downtown London staff and E-newsletters to members. The assessment of Downtown London's online marketplace was mixed with half rating it as helpful or very helpful and half rating it as not so helpful, not at all helpful or not sure.

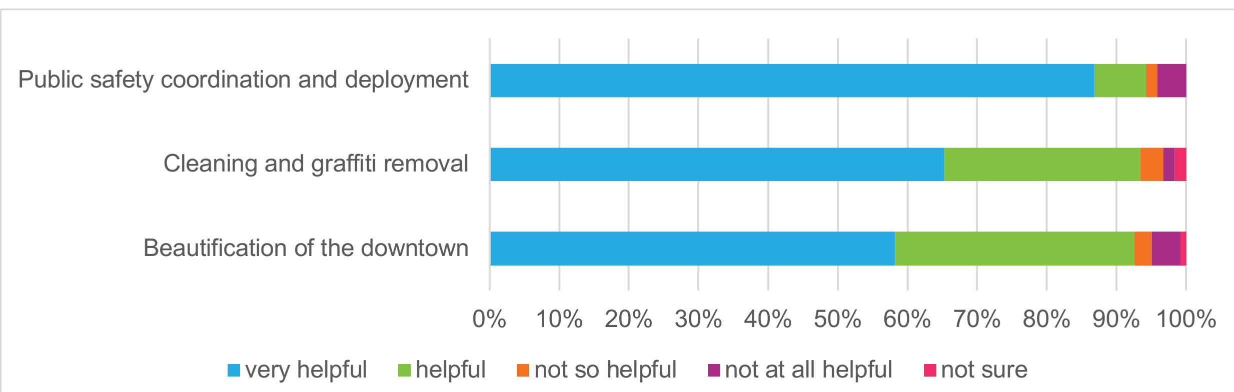
Figure 5 Business Q7: Communications, collaboration and advocacy. Thinking of the downtown prior to the COVID-19 pandemic, please rate the importance of the following factors in the success of your business.



N=123

The respondents all indicated strong support for addressing public safety coordination, cleaning and graffiti removal and beautification.

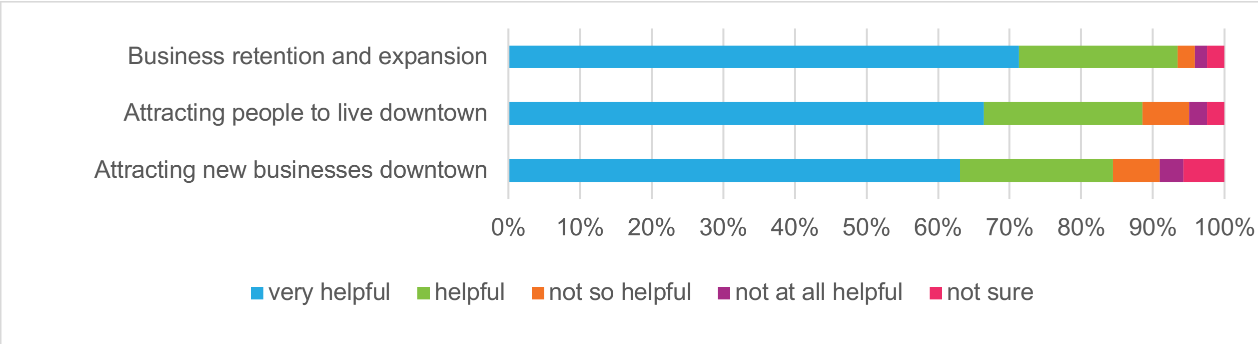
Figure 6: Business Q9: Public safety and appearance. How helpful would the following new or existing LDBA activities be for growing your business?



N=122

Efforts to support existing businesses and attract new businesses and residents were viewed as very helpful or helpful by a wide margin of the respondents.

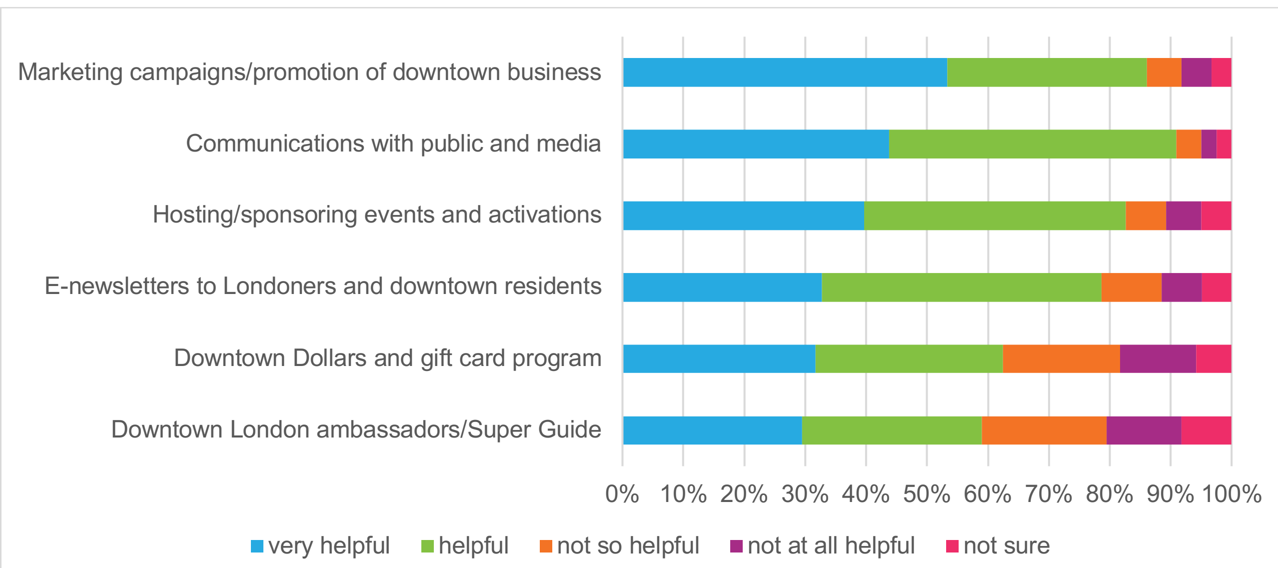
Figure 7: Business Q9: Business attraction and retention, people attraction. How helpful would the following new or existing LDBA activities be for growing your business?



N=122

The respondents rated all the marketing programs highly including (in order) marketing campaigns and promotion of downtown businesses, communications with the public and media, hosting and sponsoring events and activations, an e-newsletter to consumers, downtown dollars and downtown ambassadors.

Figure 8: Business Q9: Marketing activities: How helpful would the following new or existing LDBA activities be for growing your business?



N=122

The respondents were also asked to assess the helpfulness of different information and training to support their business. Providing information on grant programs and how to apply received the highest rating with 90% indicating it would be helpful or very helpful. Three quarters (76%) rated information and training on E-commerce and social media as helpful or very helpful. A full 61% rated business market analysis as helpful or very helpful followed by entrepreneurship programs (58%)

and employment and hiring resources (54%). Information on transferring ownership and selling a business was rated helpful or very helpful by 41% of respondents.

Figure 9: Business Q10: How helpful would the following new or existing information or training be for growing your business?

N=122

Advantages

The businesses noted several advantages for businesses located in downtown London. Key themes included the downtown's central location and ease of access, the food traffic and crowds that could be persuaded to shop or dine at the individual stores, the community of business owners and operators that support each other, the activity and vibrancy of the downtown area and the role other businesses play in attracting shoppers to the area.

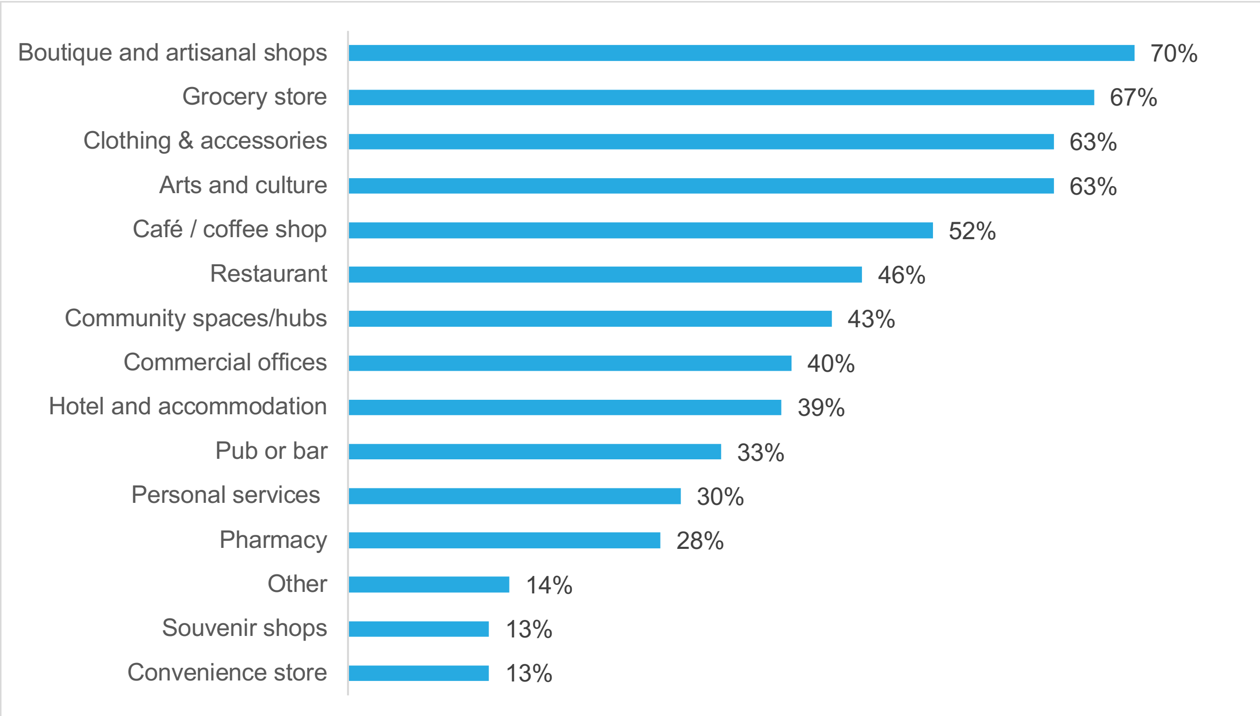
Disadvantages

The main disadvantage identified by the respondents was the social issues in the downtown including homelessness, drug use, safety concerns and perceived slow or limited response from the policer. Parking access, cost and availability was also identified as a concern. Ongoing construction and its impact on accessing and discouraging shoppers was a concern by many of the respondents.

Many expressed frustrations with the City's lack of support or poor coordination in addressing the distinct needs of the downtown. Other concerns included the large number of vacant buildings with what was perceived as little incentives or interest in developing or filling them.

The businesses named a variety of new or additional businesses that should be attracted to Downtown London. The top five included boutique and artisanal shops (70%), a grocery store, (67%), clothing and accessory stores (63%) arts and culture operations (63%) and cafés or coffee shops (52%).

Figure 10: Business Q13: What types of business should Downtown London attract or have more of?



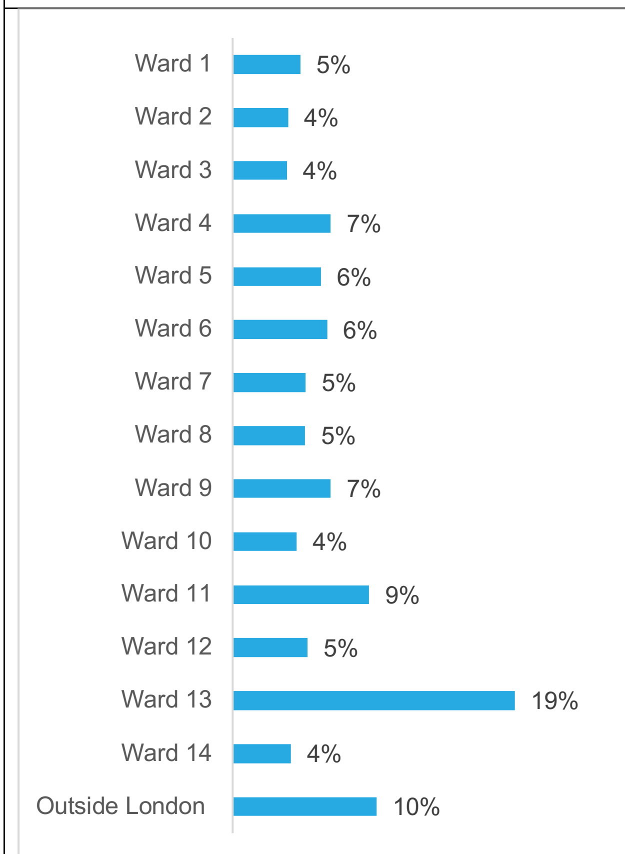
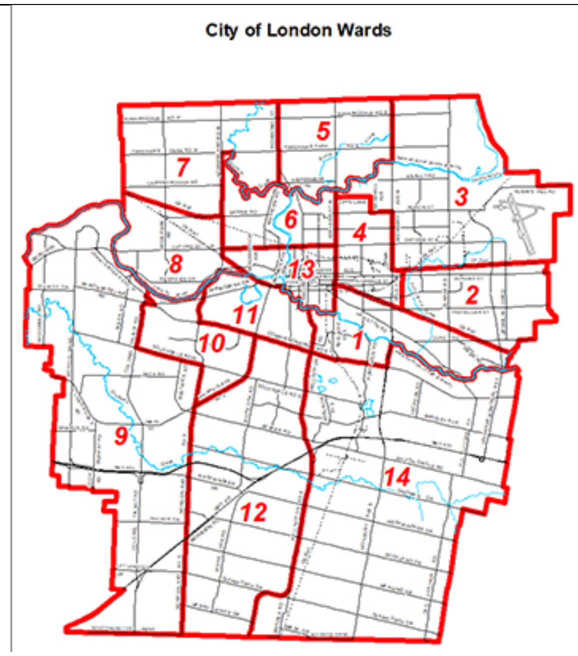
N=111

5 Community Survey

London and surrounding area residents were asked to provide their experiences, insights and opinions on creating a vibrant Downtown London. Between May 5 and May 28, 2021, 2,407 people completed the online survey.

The largest share of respondents were from Ward 13, the downtown area at 19%. In total 70% of the respondents live elsewhere in London and 10% of respondents live outside the City.

Figure 11: Resident Q1: Where do you live?

<table>
<tr><th>Respondents’ Residence</th><th>London Ward Map</th></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td>N=2399</td><td></td></tr>
</table>

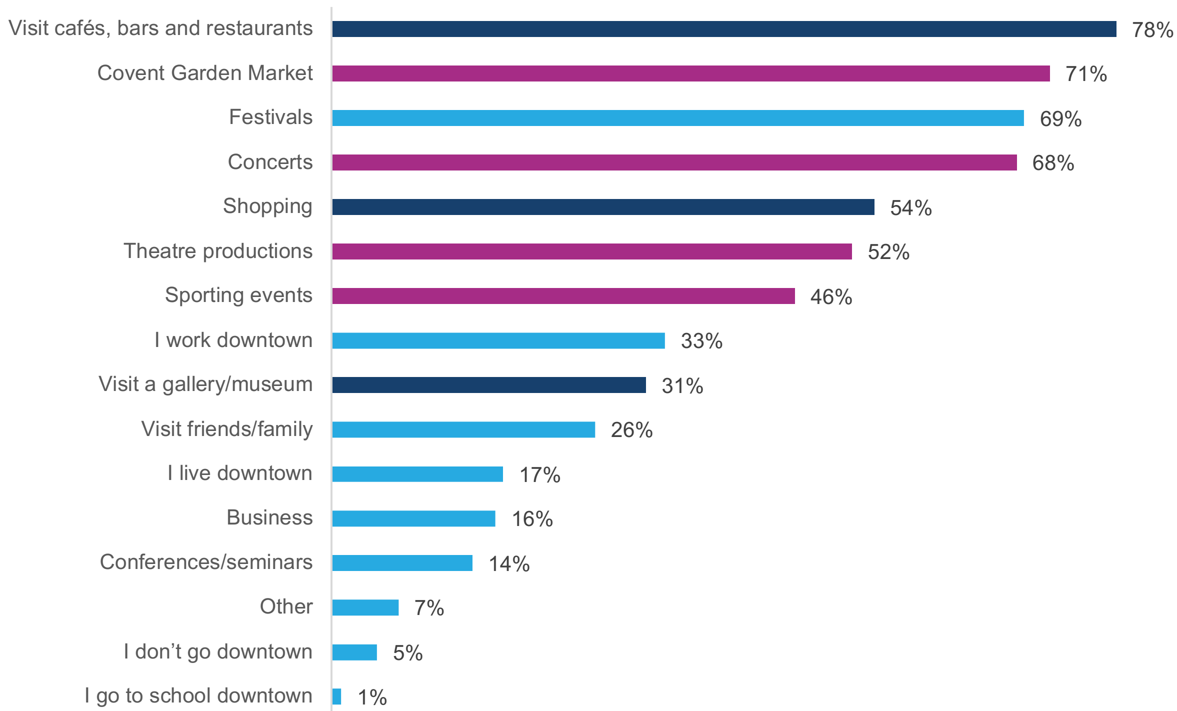
The respondents were fairly evenly distributed between ages 25 to 34 (18%), 35 to 34 (19%), 45 to 54 (23%) and 55 to 64 (22%). There were 386 respondents (16%) age 65 plus and just 3% age 18 to 24. The largest share of respondents were female at 59%.

The respondents participated in a variety of activities in Downtown London. The largest share reported that they visit cafés, bars and restaurants when they are downtown, 54% shop and 31% visit galleries and museums (shown in dark blue).

A large number of respondents said they visited key downtown assets including Covent Garden Market (71%), concerts (68%), theatre productions (52%) and sporting events (46%), (shown in purple).

Also of note, a full 69% attended festivals in the downtown, one third of the respondents work in the downtown, and 17% live downtown.

Figure 12: Resident Q4: Which of the following activities do you do in Downtown London?



N=2386

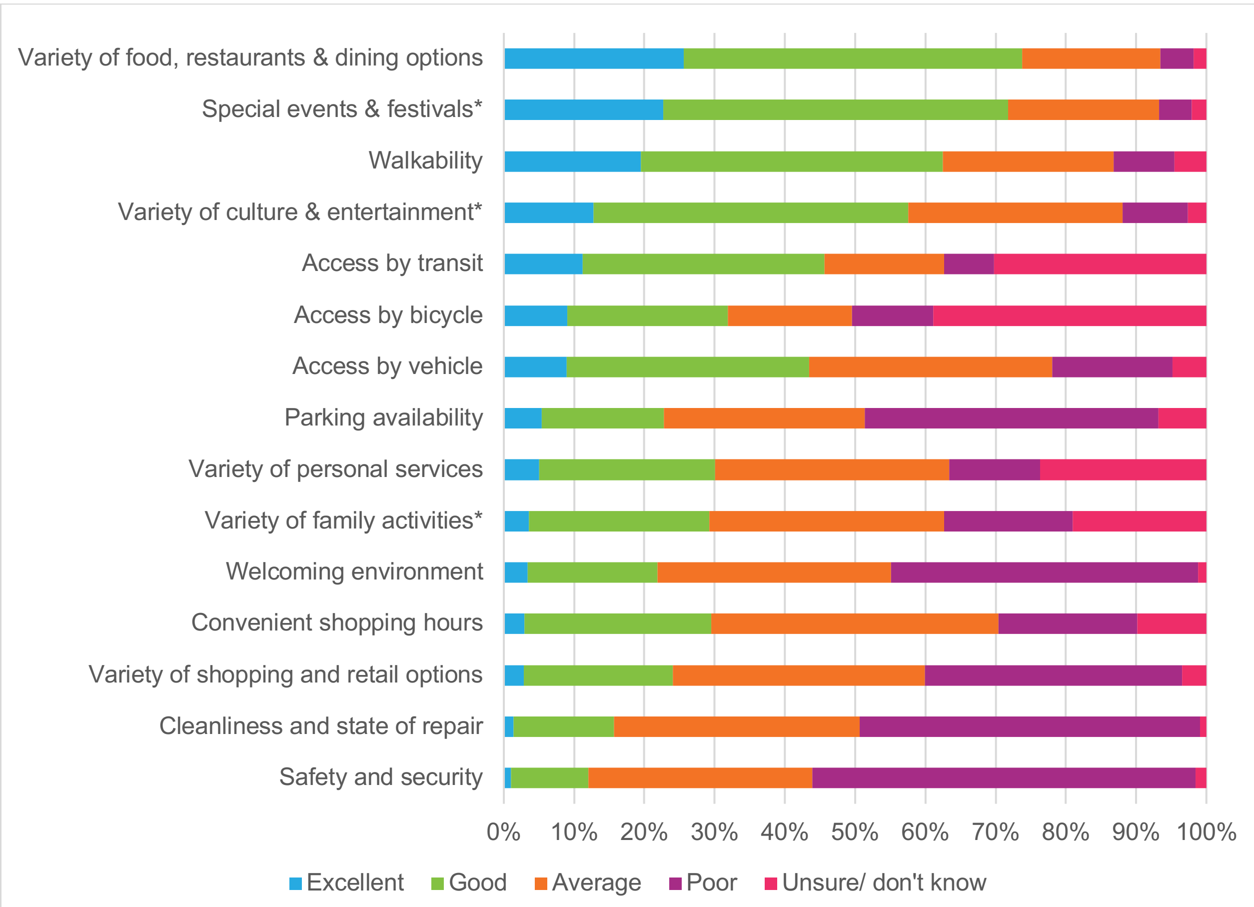
Prior to the COVID-19 pandemic one third of the respondents came to downtown London every day. A full 43% visited downtown at least 2 to 3 times a month. Just 7% indicated that they rarely or never came into the downtown. Over half of the respondents (54%) drove by themselves with another 9% carpooling. Walking was the usual way of travelling downtown for 18% of respondents. Another 9% took public transit and 4% cycled.

The respondents were asked to rate a variety of aspects of the downtown, prior to COVID-19, from excellent to poor. The variety of food, restaurants and dining, special events and festivals, walkability and variety of culture and entertainment all received high marks with over 50% of respondents rating them as good or excellent.

Safety and security and cleanliness and state of repair were at the other end of the scale with at least half the respondents rating them as poor. A welcoming environment and parking were rated as poor by 43% and 41% of respondents respectively.

A large share of respondents reported they were unsure or didn't know about the access to the downtown by bicycle or transit, indicating an opportunity for greater focus in marketing and communications. Almost one in four were unsure about the variety of personal services and 18% were unsure about the variety of family activities in the downtown, also indicating a potential area of focus for future marketing efforts.

Figure 13: Resident Q7: How would you rate the following aspects of Downtown London?

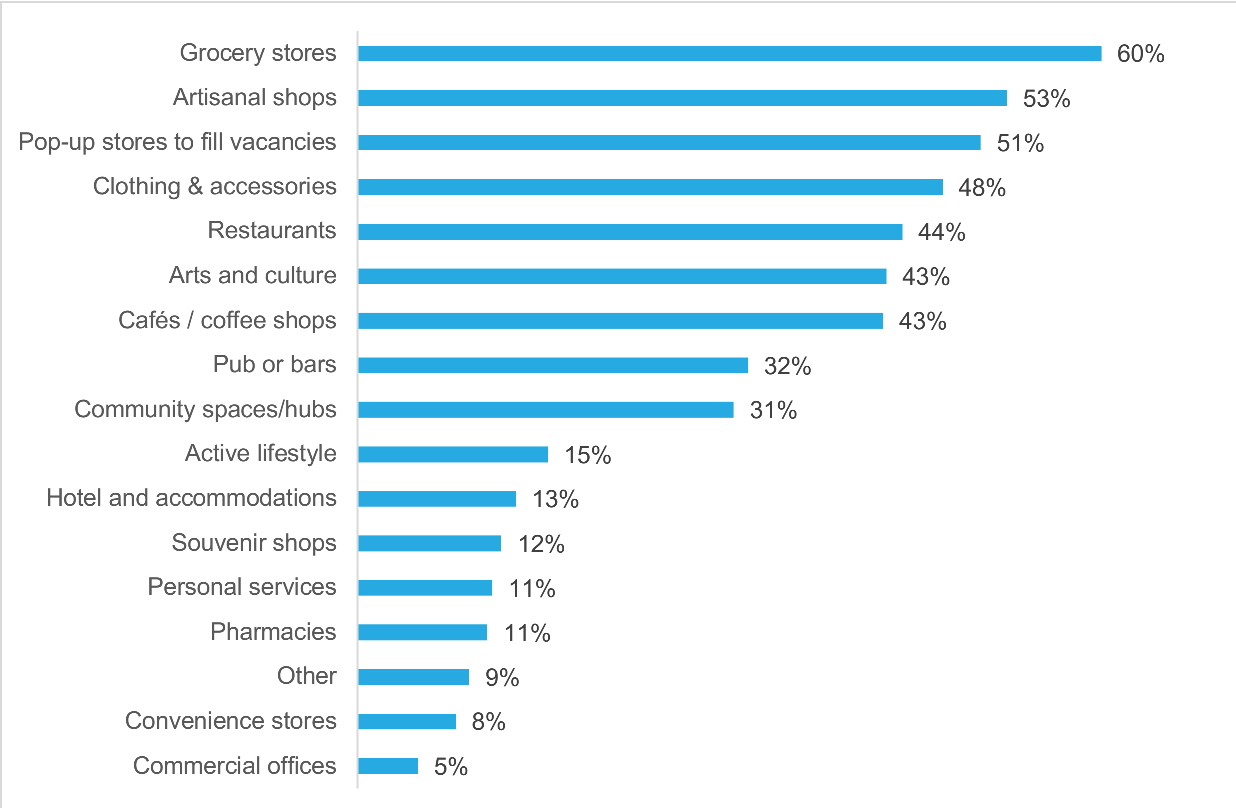


N=2330

The respondents ranking of the types of businesses they would like to see in the downtown mirrored that of the business survey (Figure 14).

The largest share (60%) would like to see a grocery store in the downtown. Artisanal stores, pop up shops and clothing stores were also referenced by approximately half of the respondents. Restaurants, arts and culture venues, cafés and coffee shops and pubs followed. One third of respondents would like to see community spaces or hubs in the downtown.

Figure 14: Resident Q8 What types of businesses are missing, or would you like to see more of in Downtown London?



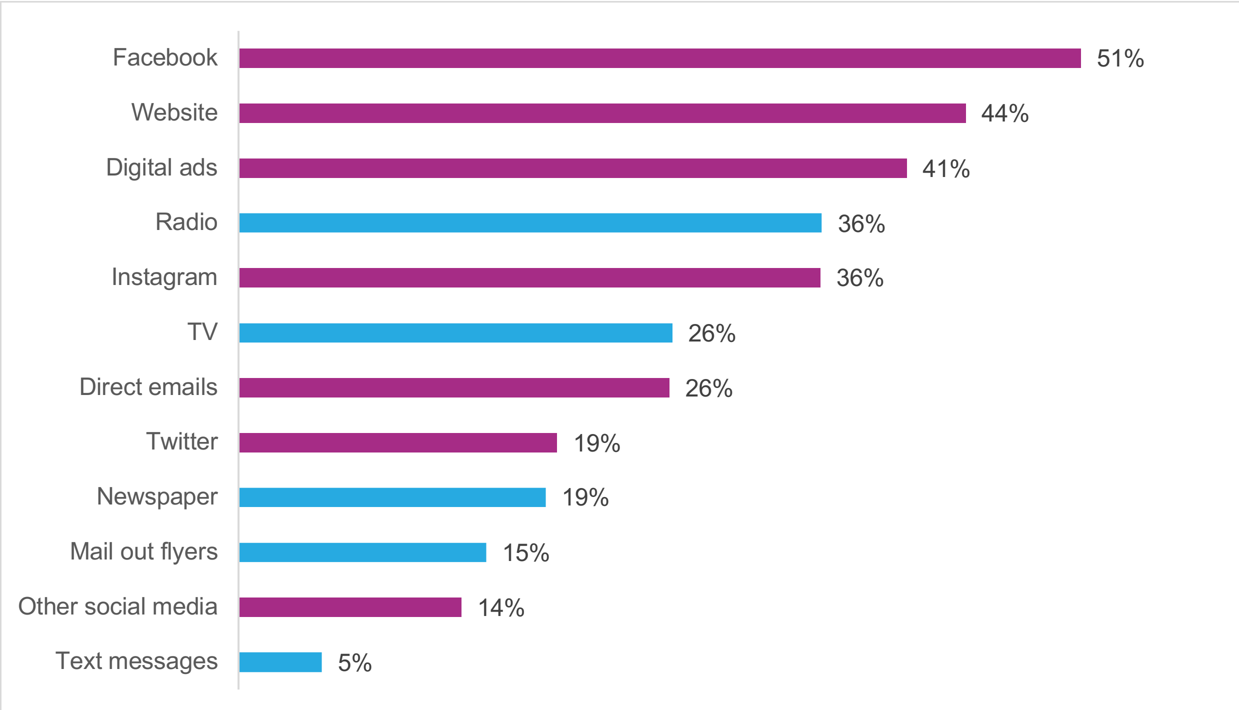
N=2255

Communications

Digital communication was the preferred source of information on activities in the downtown. Social platforms were very highly rated as highlighted in purple in Figure 15. The ranking of social platforms was Facebook (51%), Instagram (31%), Twitter (19%) and other social media (14%). A website or digital ads was the preferred sources for 44% and 41% respectively with 26% indicating they would like to receive direct emails.

Radio was popular with over one third of the respondents (36%) and television was identified by one quarter (26%). Newspaper and mail out flyers were less popular at 19% and 15% respectively. Text messages were preferred by just 5% of respondents.

Figure 15: Resident Q9: What is your preferred method of learning about the shopping, dining, entertainment and events in Downtown London?



N=2259

Figure 16 shows the respondents rating of the factors which would motivate them to make more of their purchases downtown. As noted in other areas of the survey, a safe and secure environment (76%) and cleanliness (71%) were the most common responses.

Outdoor patios, in the spring through fall (March through November) would be a motivator for 60% of respondents with 25% saying they would be attracted to patios in the winter months (December through February).

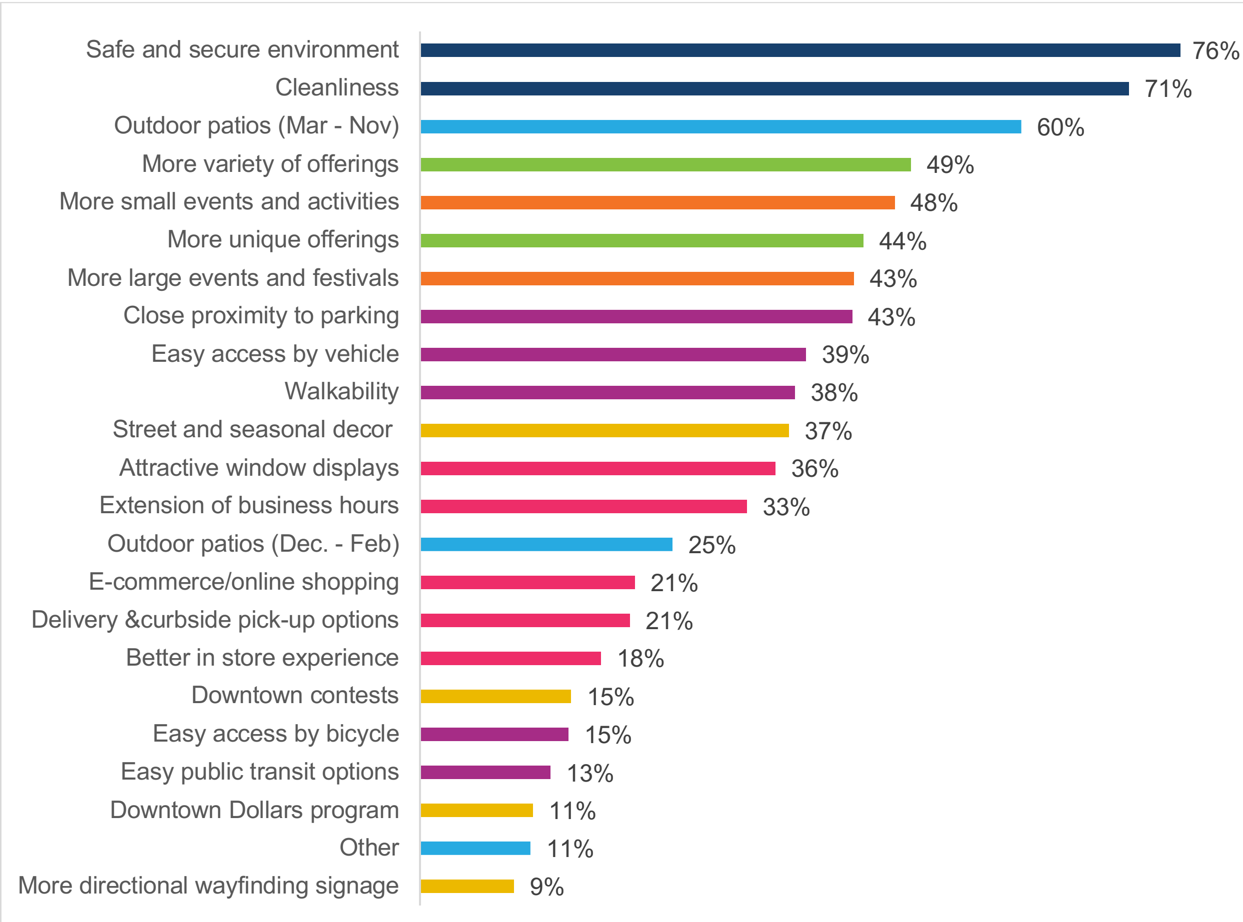
A greater variety of offerings (49%) and unique offerings (44%) were important motivators for just under half of the respondents. Events were also important motivators with small events and activities selected by 48% of respondents, and large events selected by 43% of respondents, highlighted in orange.

Access to the downtown (highlighted in purple) was a common theme. The respondents reported that with close proximity to parking (43%), easy access by vehicle (39%), walkability (38%), and easy access by bicycle (14%) would motivate them to make more purchases downtown.

Factors related to individual business promotion and operations factored into several of the motivators including attractive window displays (36%), extension of business hours (33%), E-commerce (21%), delivery and curbside pickup options (21%) and better in store experience (18%).

Place making, marketing and related motivators included street and seasonal décor (37%), downtown contests (15%), Downtown Dollars (11%) and more directional and wayfinding signage (9%).

Figure 16: Resident Q10 Which of the following factors would motivate you to make more of your purchases downtown?



N=2210

Issues for Downtown London

The respondents were asked to identify the most important issue facing London's downtown. Many of the issues identified were consistent with the response from the business survey.

Social issues and supporting/ addressing the homeless population were the most commonly referenced issues, by a large margin. It was identified by 40% of the respondents. Crime, safety and security was also a critical issue for residents. The respondents were keenly aware of social issues including a large homeless population and drug use in the downtown. Many shared experiences of being confronted by individuals who appeared mentally ill or impaired. Others spoke of persons sleeping in store doorways and witnessing individuals urinating and defecating on the street.

The residents were concerned with the number of vacant buildings in the downtown, what they perceived as a lack of motivation by the developer to fill the vacancies and lack of action by City Council and administration to discourage long term vacancies.

Other issues included the business mix and the lack of stores to attract shoppers to the downtown, ongoing construction, walkability (described by some as like a maze) and parking (including the cost, proximity to downtown shops and lack of signage).

Theme	# of comments
Commercial development	50
Parking	50
Housing	56
Walkable	60
Construction	88
Drug use	111
Cleanliness	120
Business mix	141
Vacant buildings	153
Crime, safety, security	469
Social issues homeless	819

Opportunities

The respondents were asked to identify the greatest opportunities to build a vibrant and prosperous downtown. As in the previous question, addressing crime, safety and security and providing supports for the homeless and social issues in the downtown was the most referenced opportunity. Other related opportunities included addressing drug use, cleanliness and providing greater police presence in the downtown.

Some other common opportunities identified by the respondents were offering more events. Attracting more retail and service businesses (including a grocery stores), filling vacant buildings and addressing buildings in disrepair was also considered an important opportunity.

The respondents were optimistic about the role additional patios could play in attracting people to the downtown and attracting more restaurants in general. They saw the growing housing development in the downtown as an opportunity to contribute to the vibrancy of the downtown.

They also recommended improving access to the downtown through cycling lanes and transit although they expressed a range of positions, both for and against the existing models.

Supporting arts and culture was seen as an opportunity to attract more traffic, support downtown workers and attract more residents into the downtown.

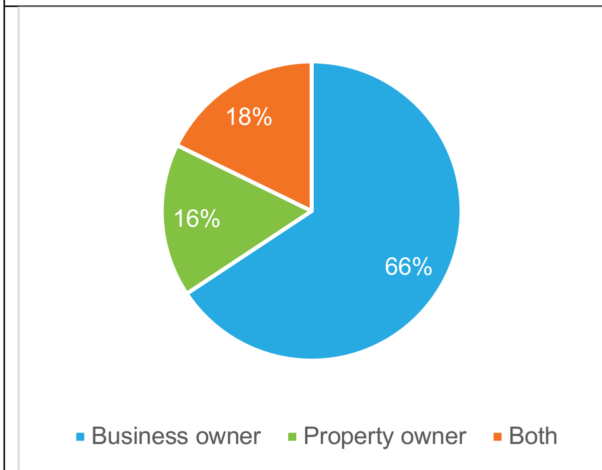
Theme	# of comments
Grocery store	50
Parking	50
Restaurant	50
Police	51
Cleanliness	56
Transit	63
Arts & culture	70
Drug use	81
Housing	81
Patio	88
Vacant building	90
Cycling	92
Social/ homeless	96
Biz mix attraction	128
Events	139
Crime safety security	188

6 Table of Figures

7 Appendix

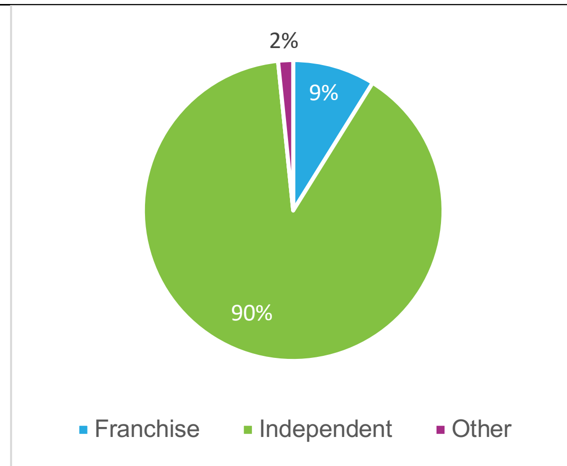
7.1 LDBA Business Survey Respondent Profile

Figure 17: Business Survey Ownership Profile



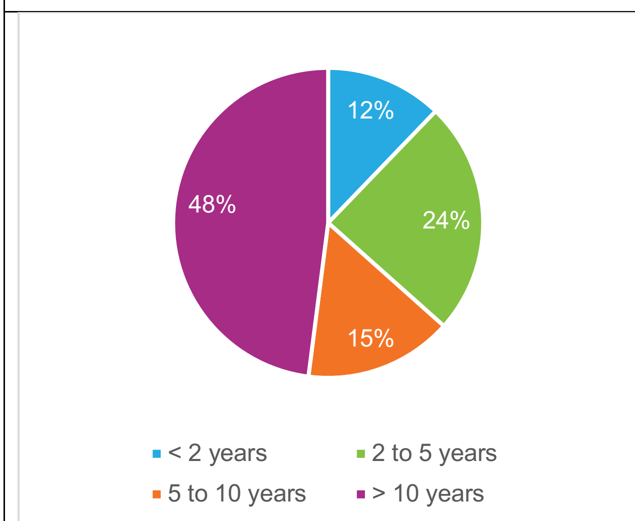
N=169

Figure 18: Business Survey Type of Business



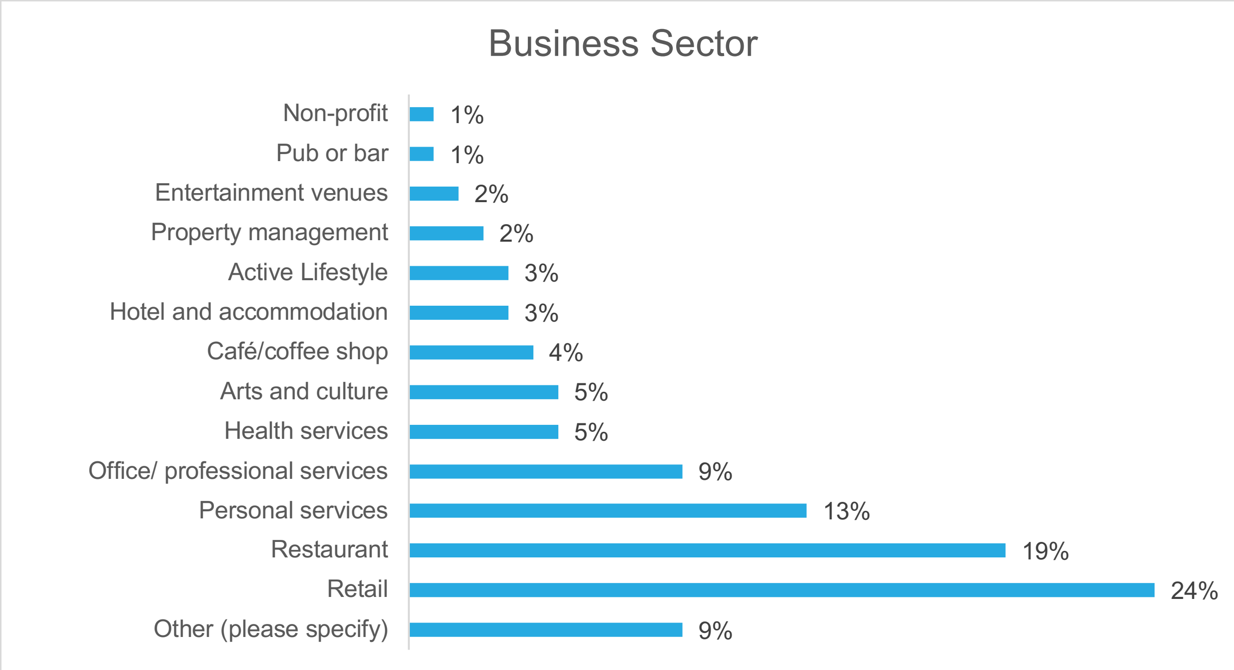
N=124

Figure 19: Business Survey Time in Downtown London



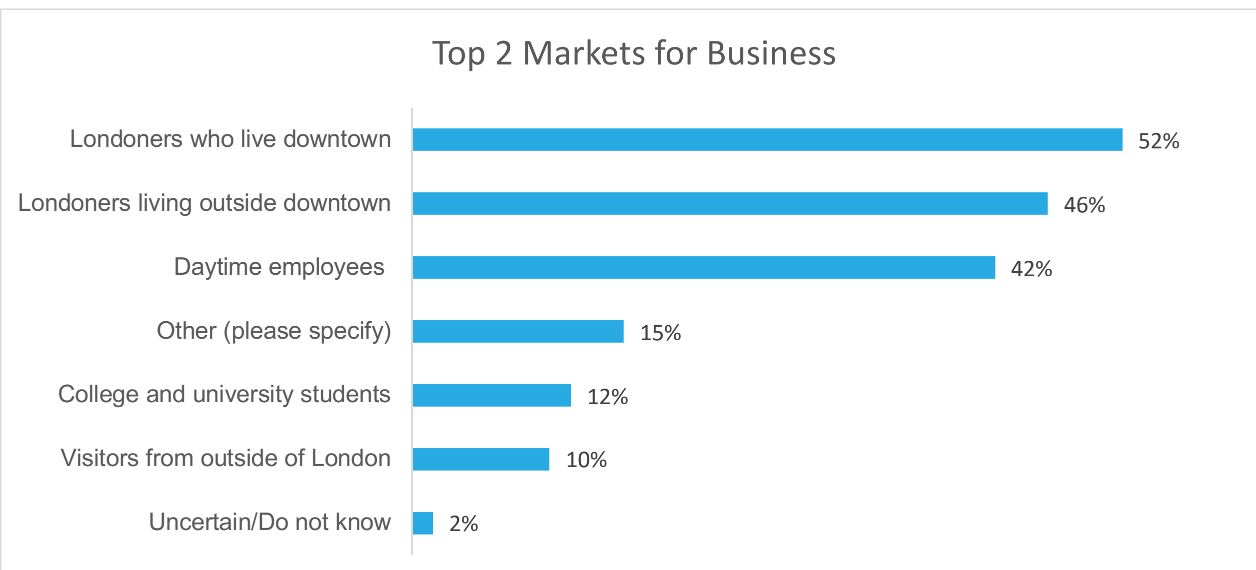
N=123

Figure 20: Business Survey Sector Represented



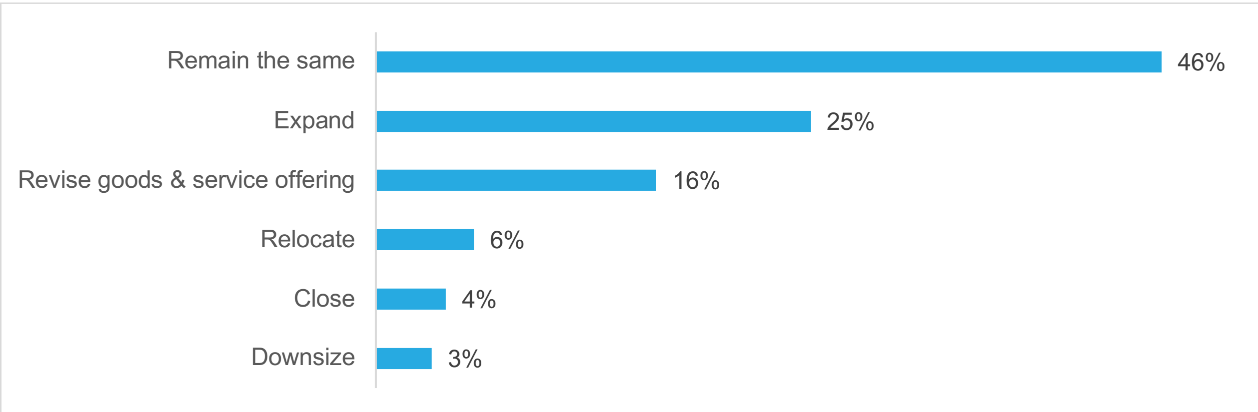
N=124

Figure 21: Business Survey Top two markets for your business



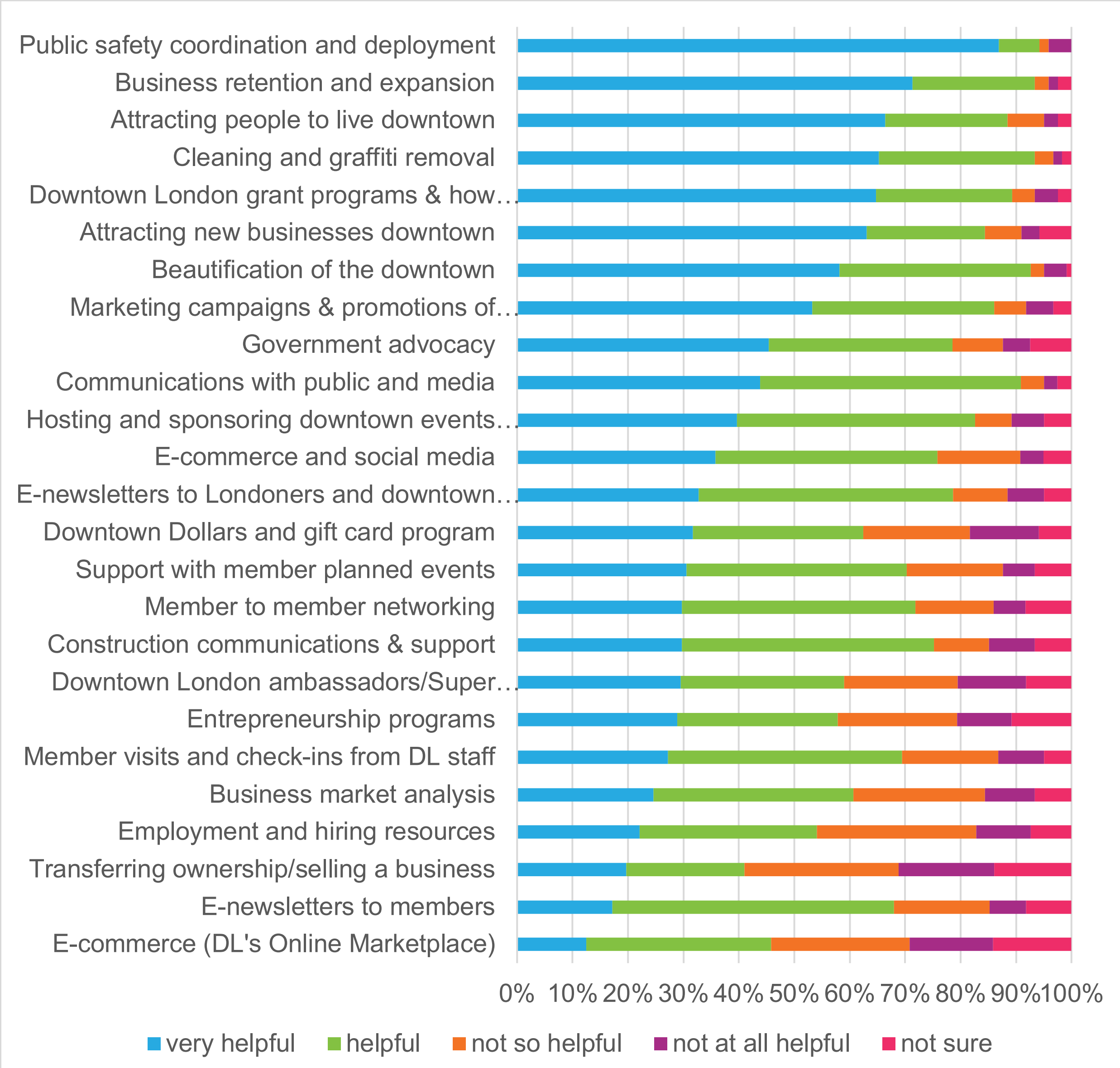
N=130

Figure 22 Business Survey Plans for your downtown business in the next three years



N=123

Figure 23: Business Survey Assessment of existing and potential new services (combined)



N=122

7.2 Community Survey Respondent Profile

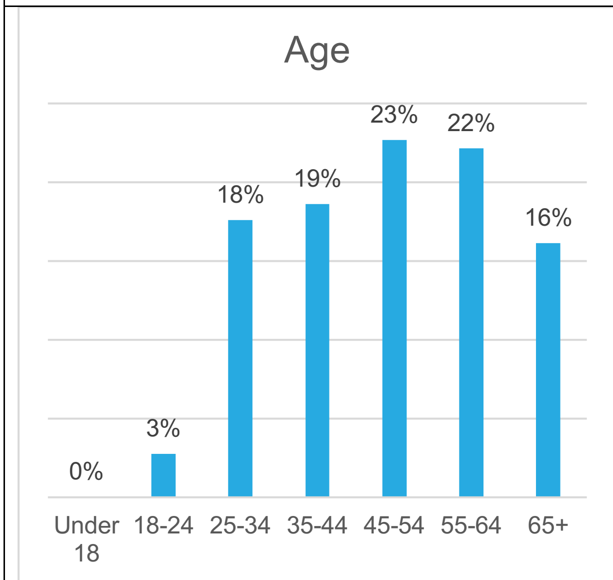
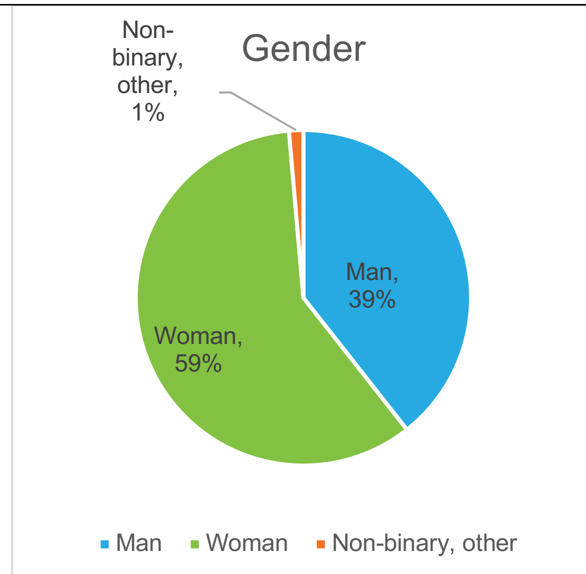
Figure 24: Community Survey Respondent Age	Figure 25: Community Survey Respondent Gender
	

Figure 26: Community Survey Which activities do you do in Downtown London?

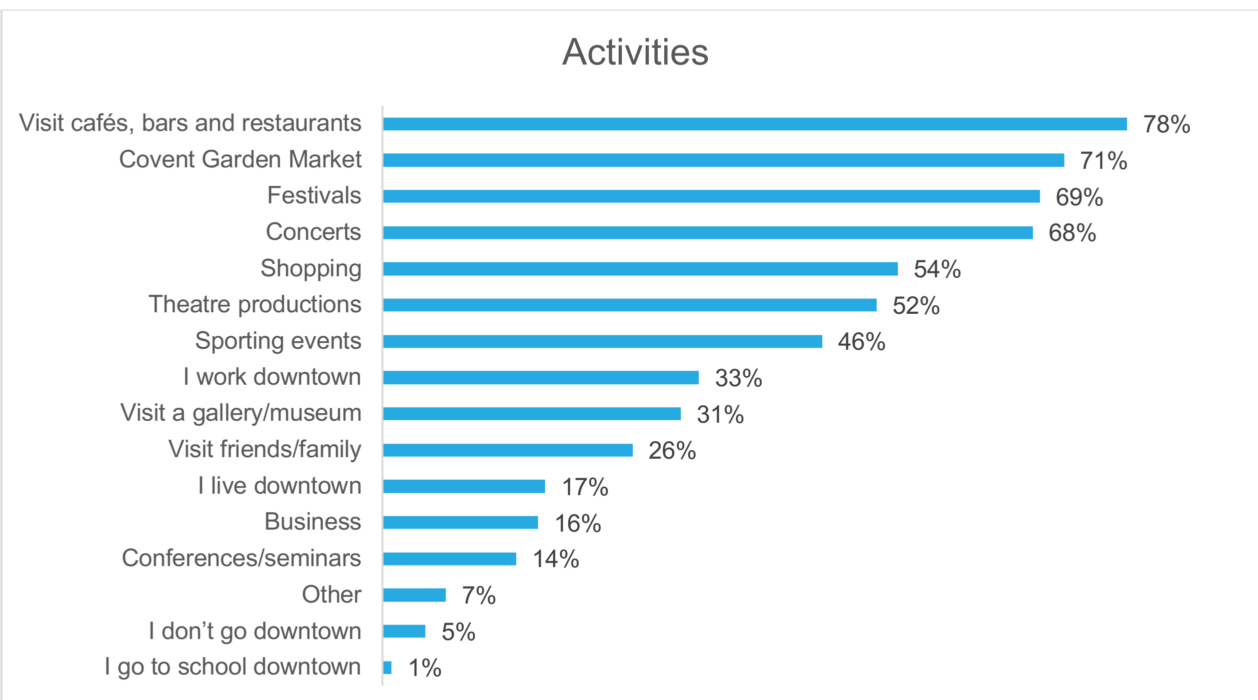


Figure 27: Community Survey How often did you come downtown before the COVID-19 pandemic?

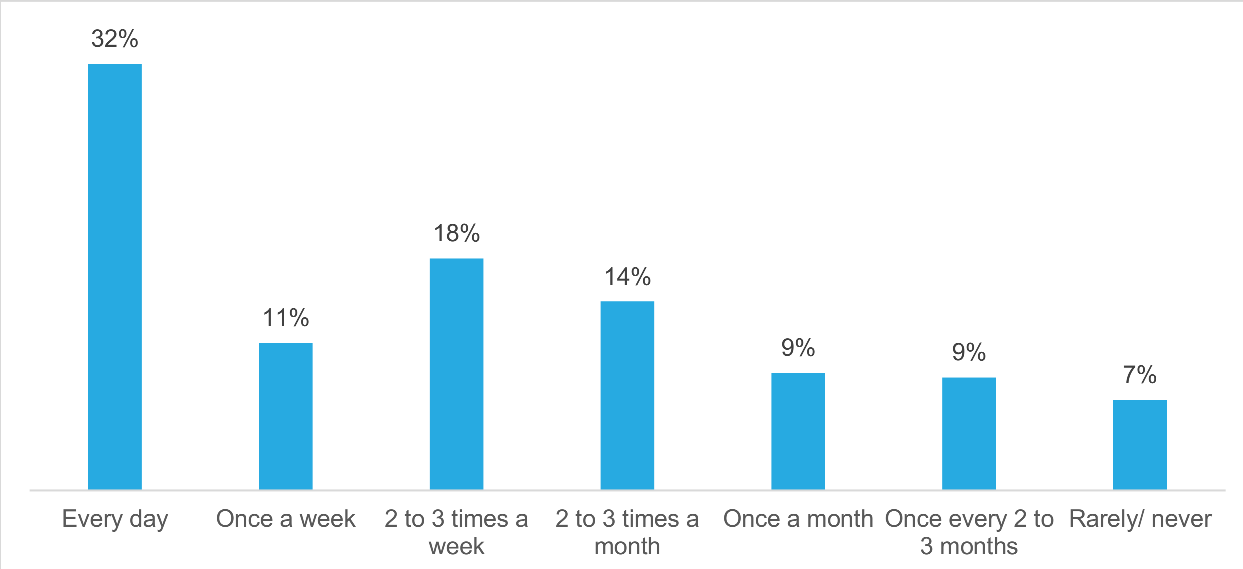
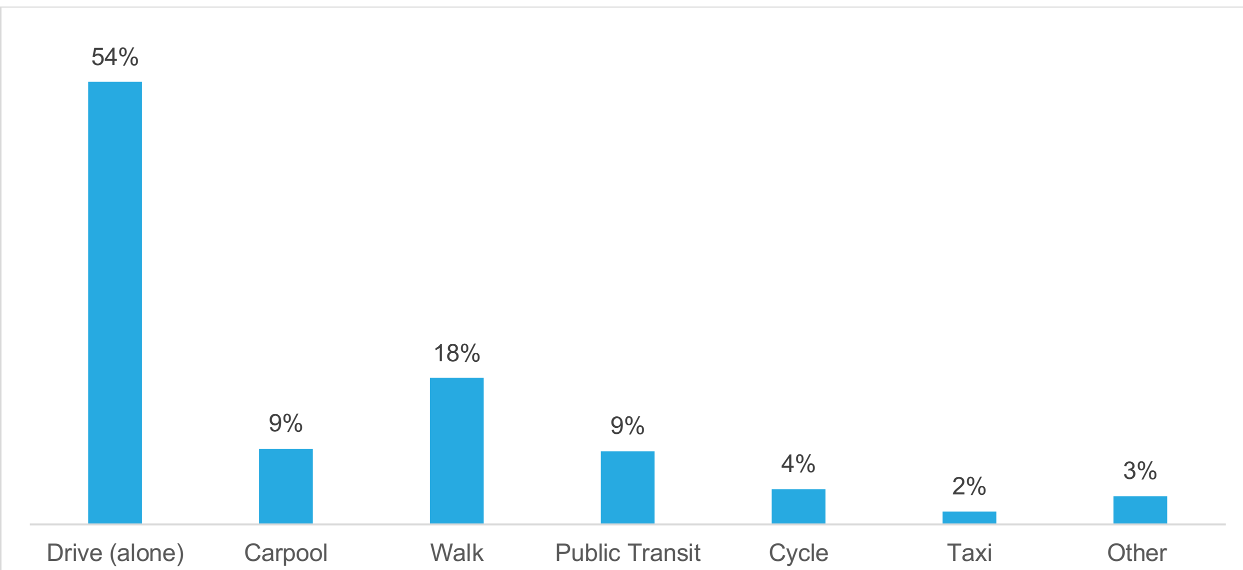


Figure 28: Community Survey: How did you usually get to downtown London prior to COVID-19?



DOWNTOWN LONDON RE-IMAGINED

DOWNTOWN LONDON STRATEGY

SWOT Analysis and Strategic Priorities

July 2021

Downtown London Strategy

London Downtown Business Association, July 2021

Consulting Team

Aileen Murray, Ec.D. (F), Mellor Murray Consulting

David Campbell, MBA, Jupia Consultants Inc.

Kevin Curtis, PhD, MCIP, Curtis Planning Inc.

Tracy John, Amplify Communications

Advisory Committee

Barbara Maly, Executive Director, **Downtown London**, Project Lead

Andrew McClenaghan, London Downtown Business Association Board Chair

Don McCallum, MainStreet London Board Chair

Jim Bujouves, Farhi Holdings Corporation

Steve Cordes, Youth Opportunities Unlimited

Allan Drewlo, Drewlo Holdings

Cheryl Finn, Tourism London

John Fleming, Western University

Christina Fox, Tech Alliance of Southwestern Ontario

Michelle Giroux, Fanshawe College

Graham Henderson, London Chamber of Commerce

Andrea Hibbert, London Arts Council

Kapil Lakhotia, London Economic Development Corporation

Steve Pellarin, London Small Business Centre

Kelly Scherr, City of London

D/Chief Trish McIntyre - London Police Services

SWOT Analysis and Strategic Priorities

1 Introduction

Downtown London, incorporating the London Downtown Business Association (LDBA) and MainStreet London (MSL) commissioned the development of a Strategy and Implementation Plan[1]. This strategic planning process is divided into three phases: research and analysis, community engagement and strategy development.

This document is one in a series of reports developed during the strategic planning process as outlined below:

Downtown London Strategy and Implementation Plan Reports

- Environmental Scan Summary Report
- Community Engagement Report
- SWOT Analysis and Strategic Priorities (this report)
- Strategic Plan
- Operations Plan, Marketing and Communications Plan
- Implementation Plan & Performance Measures
- Executive Summary

This document includes a SWOT (strengths, weaknesses, opportunities and threats) analysis and potential strategic priorities based on the finding from the Environmental Scan Summary Report and Community Engagement Report. The strategic priorities, once adopted by **Downtown London**, will be the basis of the strategy development in Phase 3.

[1] To help distinguish between the two similar names, **Downtown London** the organization appears throughout this document in bold while the geography of London's downtown is not in bold.

2 Setting the context

2.1 The London CMA

By almost all economic and demographic measures, the City of London and its surrounding metropolitan area (CMA) is prospering. According to Statistics Canada, on a seasonally adjusted basis, the size of the labour force in the London CMA swelled by 20 percent between June 2019 and June 2021, an unprecedented growth rate, faster than all other CMAs across the country by a wide margin. This growth in the number of people in the workforce translated into significant employment growth. While total employment across Ontario declined by three percent between June 2019 and June 2021, the London CMA added 34,000 net new jobs, a growth rate of 14 percent.

The population is growing to meet this accelerated workforce demand. Statistics Canada also reported in June that the population aged 15 and older was up 3.5 percent compared to the same month in 2019, one of the fastest growth rates among the country's metropolitan areas. Much of this population growth is being fueled by immigration. According to statistics published by the Department of Immigration, Refugees and Citizenship Canada (IRCC), the number of permanent residents admitted to the London CMA in the first five months of 2021 was 23 percent higher than in the same period in 2019, before the pandemic. This compares to a significant decline in total admissions across the country over the same period.

The total value of residential building permits issued in the first five months of 2021 was $838 million, more than double the amount in 2019 before the pandemic. In fact, the value of residential building permits issued across the London CMA so far in 2021 smashed the previous record level set back in 2017 by more than 80 percent.

This strong economic rebound in 2021 is a return to the strong economic growth the London CMA was experiencing pre-pandemic. In the past five years, the CMA population increased by over 10 percent, a faster growth rate than all but a handful of other urban centres across the country.

According to the Conference Board of Canada, average annual real gross domestic product (GDP) growth between 2017 and 2019 averaged 3.3 percent, over one-third faster than GDP growth across the province over the same period. The Conference Board is predicting the London CMA will have eliminated all of its GDP loss from the pandemic in the third quarter of 2021 and grow strongly again through end of 2022.

This growth has brought with it some challenges such as a tightening housing market (rental and owned) as well as a number of social challenges such as increased poverty and mental illness among the population.

2.2 London's downtown

Downtown London was benefitting from many of the positive economic and demographic trends pre-pandemic. The population was increasing and the growth in the value of building permits was strong. Coming out of COVID-19, there are a number of positive trends but also a number of challenges that have worsened in 16 months or so since the onset of the pandemic.

It is likely the number of people coming downtown to work each day has dropped sharply. While there is limited data specific to the downtown, according to Google's COVID-19 Community Mobility Report for Middlesex County (including the City of London), the number returning to formal workplaces was still down 42 percent as of the week of July 14th compared to the baseline (immediately preceding the pandemic). The use of public transit was down 53 percent. While this data is for the county and City of London overall, it is likely the same or even more pronounced in downtown London.

Many of the social challenges that existed pre-pandemic became more pronounced during the pandemic. While there are a number of community initiatives underway to address these challenges, the social issues remain a potentially serious barrier to the prosperity and growth of the downtown.

2.3 The role of **Downtown London**

This is the strategic planning process for **Downtown London**, which consists of the London Downtown Business Association (LDBA also known as the BIA) and MainStreet London (MSL). It is not a strategic planning process for the development of downtown London[2]. This is an important distinction as the LDBA represents the over 600 BIA levy payers in the downtown and the strategic plan will reflect their priorities and collective aspirations.

However, the success of **Downtown London** and the success of the downtown are aligned. A thriving and growing downtown will support the ambitions of LDBA members and therefore the focus of the **Downtown London** strategic plan will be based on ways the organization can help influence the success of the downtown moving forward.

[2] The City of London's Core Area Action Plan is the plan that guides the overall development of downtown London and adjacent neighbourhoods.

3 SWOT Analysis

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis involves identifying the factors that are influencing **Downtown London's** current and future growth and potential. The analysis is based on the internal and external factors that can positively or negatively impact **Downtown London**'s ability to realize its objectives. A SWOT analysis is an important tool in the evaluation of an organization's ability and capacity to achieve its established mandate.

A SWOT analysis is characterized by the following terms:

	Strengths	Internal positive attributes or assets current present in **Downtown London** that give the organization a potential advantage.
	Weaknesses	Internal negative issues or characteristic that limit the current or future opportunities for **Downtown London**.
	Opportunities	Positive external factors or trends that **Downtown London** could leverage to achieve a positive outcome.
	Threats	Negative external factors that threaten **Downtown London**'s future.

The SWOT analysis was developed based upon the extensive document review, economic analysis, best practice review and stakeholder engagement through the strategic planning process. The SWOT analysis begins the process of narrowing the focus for **Downtown London**'s strategy by identifying those areas of particular importance where specific actions may be required such as strengthening and leveraging internal strengths and external opportunities while removing and mitigating internal weaknesses and external threats.

Downtown London faces a unique set of conditions that have led to its current situation. These conditions will heavily influence the future trajectory of the organization.

Figure 1: SWOT Analysis

	Positive		Negative
Internal	**Strengths**	*Develop & Defend*	**Weaknesses**
	Strengthen & Leverage		*Remove & Mitigate*
External	**Opportunities**	*Apply & Protect*	**Threats**

3.1 SWOT: Downtown London (the place)

The environment and context in downtown London play a fundamental role in the success of **Downtown London** (LBDA and MSL). Based on the broad feedback provided during the consultations and the research conducted for the strategic planning process, the following is a SWOT analysis for the downtown itself. Below, in Section 3.2 is a SWOT for the LBDA/MSL. The analysis is not meant to address every single strength, weakness, opportunity or threat. Rather it is meant to provide an assessment of the state of the downtown as it relates to the strategic plan that will guide the efforts of **Downtown London** over the next few years.

	Strengths

- The number and variety of quality restaurants, cafés, bars, unique shops
- High concentration of firms and employment in the downtown including personal care firms (5 x CMA), restaurants (6 x CMA), banks (6 x CMA) and full-service restaurants (7 x CMA)
- Presence of the Thames River
- VIA station, new transit hub and BRT routes
- Intact, heritage streetscape
- Public spaces (Victoria Park and others)
- Cluster of creative arts and culture, library, music venues, galleries etc.
- Young professional population adds to the energy and progressive image of downtown
- Fanshawe College – ability to attract # of students, international students, source of part time employees – key role of MSL in supporting the development in the downtown
- Dundas Place is designed to be flexible to accommodate a variety of outdoor event
- Daytime population in BIA areas swells by 4.6 times compared to the permanent population
- Downtown residents are more educated, more environmentally friendly, and more motivated to succeed in their careers make the area attractive to prospective businesses/ employers
- The Core Area Action Plan represents an opportunity to advocate for, and where appropriate, partner with the City on improvements in the downtown
- BRT service provides an opportunity to bring more City residents into the downtown
- Existing CIP loans available to support downtown businesses
- Relatively untapped university student market
- Strong tech sector representation in the downtown

Weaknesses

- Persistent social issues that have contributed to higher crime rates, vandalism, graffiti, garbage, and safety concerns among residents, visitors, business owners and employees
- COVID-19 has weakened the market for visitors, residential development, retail and office space
- The high number of vacant properties in the downtown
- Ownership of downtown land and buildings concentrated with a few developers
- Large number of surface commercial parking lots
- Lack of families and children in the downtown
- Parking – worker and public frustration with parking accessibility and price
- Accessibility of the downtown – a challenge for cars to get in
- Lack of grocery store – identified as a missing retail offering for residents and office workers
- Construction downtown has changed traffic patterns and discouraged visitors

Opportunities

- Greater appreciation of local businesses as a result of COVID-19
- Cultural District Strategic Plan implementation could attract greater investment and foot traffic
- Concentration and variety of the music, arts and cultural activities and organizations in the downtown is unique- recent efforts to get UNESCO recognition as a musical city
- City's recent expanded commitment with activation programming, ambassador program (funded through to December 2023) and addressing social issues
- LEDC's work to attract film production is expected to result in economic activity in downtown
- City's Core Area Action Plan is expected to increase # of patios in the downtown and streamline approval processes
- A post pandemic surge in demand for entertainment, dining and services is expected starting with younger demographics – also expected to drive demand for downtown living
- Growing number of residential developments in the downtown
- Population in downtown London is projected to continue to grow - forecast at 2.3% annually between 2019 and 2029
- Proximity to the riverfront, and greater public interest in connection to nature during the pandemic
- Pandemic experimentation could accelerate trends to close streets and expand patios, accelerate the trend to diversity beyond cars
- Growing societal interest in cultural diversity offered through downtown restaurants, shops and cultural organizations

	Threats

- City may have less money to provide to finance incentives in the short and medium term. There is a risk that funding in the downtown could be reduced in future budgets
- A decrease in the number of office workers is expected in the short and medium term
- May be some reluctance for employees, residents and tourists to return to the downtown which could further challenge businesses' ability to rebound after COVID-19
- Risk that many existing buildings and surface parking lots do not get improved or redeveloped could negatively impact potential new investment in the downtown
- Construction in the critical re-opening post-pandemic time frame could discourage the return of shoppers and downtown workers to the downtown

3.2 SWOT: **Downtown London** (LBDA and MLS)

The **Downtown London** SWOT is organization-specific and summarizes its current strengths and weaknesses, opportunities that could influence its direction and activities moving forward and the threats that could hinder its efforts to support a prosperous downtown in the years ahead.

	Strengths

- Experienced staff
- Solid financial resources
- Committed board and members
- Partnerships with anchor tenants such as Budweiser Gardens, Covent Garden Market, RBC Place, Fanshawe College, the Grand Theatre, Museum London, and London Library
- Partnerships with community building organizations such as the London Economic Development Corporation, Tourism London, Tech Alliance, Small Business Centre and London Arts Council
- New Executive Director – opportunity to forge new working model
- Strengthening relationship with the City administration
- Strong relationship with the individual business owners and members
- Track record of developing and implementing successful events and programs and establishing sponsorships

Weaknesses

- **Downtown London** has assumed many roles beyond those of a typical BIA. There is a lack of focus and agreement on core activities
- The public is confused about the programs offered by the City of London and MSL
- Confusion between **Downtown London** the organization and London's downtown (the geographic area) makes branding and communications more difficult
- Limited understanding among some members of the assessment allocation for the LDBA
- Limited tools for data collection and analysis to track LDBA performance and general City metrics
- Partners do not understand the relationship between the LDBA and MainStreet London, further complicated by overlapping membership on the boards and combined board meetings
- Complicated history and previous organizational infighting have damaged reputation of **Downtown London** in eyes of City Council
- The LDBA, City's downtown CIP, and Core Area Action Plan boundaries are not aligned
- MainStreet London not functioning as originally intended
- **Downtown London** is vulnerable to downturn in BIA revenue due to a small number of levy payers (16 of 643) that pay just under half of the total levy

Opportunities

- Recent corporate reorganization of the City of London could provide greater emphasis and priority on addressing issues and opportunities for **Downtown London**
- Leveraging the major investments by the City of London in the downtown
- Key downtown anchors (Budweiser Gardens, London Museum, RBG Place, Covent Garden Market, and others) have expressed interest in greater collaboration with **Downtown London**
- Fanshawe College and Western University interested in increasing their contribution and engagement with **Downtown London**
- City of London's data access and services can support **Downtown London**'s market intelligence
- Rapid population growth across London is creating a greater pool of residents, shoppers, potential investors

	Threats

- Risk that recent collaborative partnerships to address social issues will not have desired effects in short -medium term and may keep many visitors, residents and employees from coming back
- Some in the City of London views the BIAs collectively – **Downtown London** (LDBA) is just one of the BIAs – some see it as an appendage of the city. The LDBA mandate is much broader than the City's perception – need to demonstrate a greater degree of separation from the City.
- Competition - other areas like Mid-town or Old East Village have the potential to overshadow the downtown's role in terms of unique, small, independent businesses
- Challenges with relationship with City regarding decision-making that impact the downtown, limited connection with the various departments and individuals that impact downtown
- Some City Council members do not recognize the important role the downtown plays in the City's overall vibrancy and economic development
- Some businesses (LDBA members) may not survive the economic shock of the COVID-19 pandemic

3.3 Strengths

Downtown London has an experienced staff and solid financial resources to implement the organization's strategic plan, once established. The LDBA and MSL boards have demonstrated their commitment to the strategic plan through their participation in the development of the strategic plan. The individual LDBA members have also been active participants in the development of the strategy through the completion of the members survey.

The organization has a track record of organizing, partnering and sponsoring successful events and programs in the downtown. The LDBA members report a positive, supportive relationship with **Downtown London**.

Downtown London is part of a supportive and collaborative ecosystem of anchor organizations and community building organizations, most of which were located in the downtown. **Downtown London** and the businesses in the downtown have benefited from the foot traffic and activity generated by the anchor organizations such Covent Garden Market, Budweiser Gardens and RBC Place. The organization also has positive relationships with a host of community building organizations like LEDC, Tourism London, Small Business Centre, Tech Alliance and others who are mostly centred in the downtown.

Throughout the pandemic, **Downtown London** staff has worked closely with the City of London and other partners as part of a collaborative response to the pandemic and the social challenges in the downtown.

The downtown has a number of key assets. The downtown features a large number and variety of restaurants, bars, restaurants and shops that are highly valued by residents. It is home to a vibrant cultural centre with a cluster of arts, entertainment and music venues and events. Fanshawe

College's downtown campus brings a large number of students into the downtown adding potential customers and employees and activity into the downtown. It is also the hub of the city's transportation network including the BRT and VIA rail. The area has a number of public spaces including Dundas Place, Victoria Park and connection to the Thames River.

The downtown is also the centre of commerce. The daytime population swells by nearly five times with the influx of downtown workers (pre-pandemic). The downtown has a high concentration of personal care firms, restaurants and banks. The downtown population is growing with investment in new high rise residential developments. Downtown residents are highly educated professionals who add an energy and vibrancy to the area.

The City of London has a number of programs and incentives that support new and existing businesses in the downtown.

3.4 Weaknesses

The prevalence of social issues concentrated in the downtown and the related crime, vandalism, graffiti and garbage is the most pressing issue facing the downtown and by extension **Downtown London** as identified by residents, visitors, business owners, employees and employers.

Downtown London has assumed a number of activities and programs beyond that of a typical BIA and staff report feeling stretched beyond the organization's capacity.

Downtown London faces several communication challenges. The name **Downtown London** is confusing for many; it is not always easy to distinguish between the organization and the place. The public and in some cases City staff, don't understand the responsibilities of the City and the LDBA. Also of concern, the boundaries of the LDBA, the City's CIP program and the Core Area Action Plan boundaries are not aligned.

Governance and the relationship between MainStreet London and the LDBA are also not well understood, further complicated by overlapping memberships on the two boards. MainStreet London's mandate has changed multiple times over its history, and it is not functioning as originally intended. Earlier infighting has damaged **Downtown London**'s reputation with City Council.

A small number of levy payers (primarily corporate employers) are responsible for just under half of the total levy leaving the organization vulnerable to changes in demand for office space in the downtown.

COVID-19 has created an economic and social crisis, upending the tourism, retail, office and residential industries. The vacancy rates of commercial buildings in the downtown exceeds the measures of a healthy downtown. Ownership of these vacant properties is concentrated in a small number of developers and these owners may not be motivated to fill the vacancies with any urgency.

There is a great deal of workers and public frustration with parking access and prices in the downtown. The construction and overall traffic access are also areas of frustration for businesses, employees and London residents alike.

On the residential front, there is high turnover of residents, a disproportionate share of people living alone and a lack of families and children in the downtown. Limited grocery store items mean that downtown residents leave the downtown for groceries.

3.5 Opportunities

The City of London's recent corporate reorganization indicates a shift in City policy and an opportunity to find greater support for addressing social challenges, safety concerns, COVID-19 recovery and re-animation of the downtown. The City has also committed to support **Downtown London** with access to data to support better use of metrics to track the downtown's economic and demographic trends.

The key anchors in the downtown, already strong partners for **Downtown London,** have expressed interest in greater collaboration with the organization. Fanshawe College, already an important partner in the downtown is exploring further opportunities to support **Downtown London**'s activities. Western University's recently released strategic plan lays the groundwork for a physical presence, programming and partnerships in the downtown.

There are a number of complementary strategies and initiatives underway that have the potential to drive economic opportunity in the downtown including the City's Music, Entertainment and Culture District Strategy (2018), the application for UNESCO recognition as a musical city, LEDC's investment attraction efforts for film production and the City's Core Area Action Plan. The growing number of residential developments in the downtown will contribute to the continued population growth in the downtown.

The pandemic has resulted in some broader societal changes that have the potential to positively impact the downtown. The greater appreciation for local business and cultural diversity bodes well for the unique stores and restaurants in the downtown. The number of patios and streamlined approvals processes is expected to remain post COVID-19. Also expected as the economy opens up, will be a demand for entertainment, dining and services, starting with the younger population, which is expected to drive even greater demand for downtown living.

3.6 Threats

The societal issues and related safety concerns in the downtown facing have impacted the operations of LDBA members, downtown businesses and residents. The collaborative effort of the City, social agencies, **Downtown London** and other stakeholders is critical to addressing these issues. Lack of participation and engagement in addressing this challenge by all stakeholders could seriously compromise the collective's efforts and impact.

MainStreet London has struggled to find its role in supporting investment in the downtown. Unless changes are made to the mandate and the operation of MSL, **Downtown London** risks continued confusion and disagreement about its future, which will take away of the important work of strengthening the downtown.

The City's relationship with **Downtown London** is pivotal to the success of the organization. The organization has made good progress in establishing deeper connections and a more collaborative relationship with City Council and staff. There is a risk that the City will view **Downtown London** as one of the several BIAs in London and fail to recognize its significant role as a centre of economic activity and the heart of commerce in London. Other areas like old East Village and Mid-Town are organizing and providing the unique shops and restaurants that residents value. Without a concerted effort **Downtown London** could be overshadowed by these other commercial districts.

The post-COVID period is expected to be incredibly busy as LDBA member businesses shift from maintaining to rebuilding and re-imagining their business. The **Downtown London** staff have previously indicated that they are stretched. These increasing demands could compromise the team's focus and effectiveness.

Unfortunately not all business are expected to survive the economic shock of the COVID-19 pandemic, causing greater holes in the commercial landscape in the downtown that will contribute to a negative image. Working from home has become a popular alternative for many office workers during the pandemic and many may be reluctant to return. A decrease in the number of office workers is expected, resulting in fewer people in the downtown.

A decrease in demand for office space in the downtown and developers who are not motivated to invest in vacant buildings or surface parking lots could discourage new investment in the downtown.

The current construction projects could also discourage shoppers, workers and other visitors from returning to the downtown.

4 Strategic Priorities

Strategic priorities are those factors that will have the most significant impact on **Downtown London**. These strategic priorities, when confirmed, will provide the foundation for **Downtown London**'s vision, mission, goals and objectives.

This document will feed into the strategic plan for **Downtown London** which consists of the London Downtown Business Association (LDBA) and MainStreet London (MSL). The destinies of the downtown and **Downtown London** are intertwined but the goal of this document is to determine what role **Downtown London** should play to ensure a prosperous downtown.

The City of London's Core Area Action Plan is guiding the development of a wider area that includes the downtown. It lays out a series of short, medium and longer-term actions that will build a stronger foundation from which the downtown will be positioned to thrive in the years ahead. These include infrastructure investments, plans to address housing, parking, safety, and other social challenges.

The **Downtown London** strategic plan will be the roadmap that will detail how the LDBA members and the levy will be used to support the city's Core Area Action Plan vision of "a place that is vibrant, attracting investment and talent; a canvas for culture, arts, music and entertainment; safe and secure; and buzzing with activity at all times of the day and night".

4.1 Determining **Downtown London**'s strategic priorities

Despite the challenges of engagement during a pandemic, it was imperative to undertake a broad-based consultation with businesses, the public and other key stakeholders to support the development of the new **Downtown London** strategic plan. The strategic priorities listed below were identified following a detailed review of dozens of related research reports and documents; interviews and focus groups with close to 100 individuals and online surveys that resulted in more than 2,200 individuals providing their vision for a prosperous downtown.

From these priorities will arise the strategic plan for **Downtown London**. This strategic plan will be anchored by a vision and mission for the organization. The strategic priorities form the basis for the goals and objectives that will guide the organization over the next five years and for the development of specific actions and initiatives that will use the levy and the capacity of **Downtown London** to address the objectives, fulfill the mission and work towards the vision of a prosperous downtown.

The following strategic priorities have the potential to establish **Downtown London** as a high performing organization that effectively supports its members, attracts investment, residents, shoppers, diners and visitors and contributes to the City's economic development and quality of life.

Strategic Priorities

	Supporting a safe and welcoming environment in the downtown
	Diversifying economic base in the downtown
	Strengthening partnerships
	Expanding Downtown London's role as the downtown's champion
	Supporting members

4.2 Supporting a safe and welcoming environment in the downtown

The consultations with stakeholders were clear. Downtown London needs to return to a place where everyday thousands of people are walking through the streets, eating at restaurants, shopping, attending school, staying in hotels, engaged in recreation, attending events and visiting tourism venues. Residents want an exciting downtown with pop-up events and other daily and weekly activities that draw people in from across the CMA, province, country and world. The vision of downtown as a visibly thriving place requires it not only to have the activities that attract people but also a safe and attractive environment in which they can interact.

What is the role of **Downtown London** to support a safe and attractive environment? There are many organizations involved in supporting a safe and attractive downtown including the City of London, London Police Service, social services groups and others. For example, the BIA could support this priority by:

- Continuing to contribute to the collaborative efforts to address social issues in the downtown, monitoring progress, educating members and encouraging open communication between all impacted stakeholders.
- Striving for clean and well-maintained member premises and streetscapes.
- Minimizing the visibility of vacant buildings.
- Ensuring there is adequate lighting across the BIA area.
- Encouraging members to stay open longer where appropriate.
- Advocating with the City and other key partners on related issues and arming them with key insights and data from member, resident and visitor surveys.

There is significant infrastructure investment occurring in the downtown. While this is important to the future, it will continue to cause considerable disruption in the short term. **Downtown London** will need to work with its partners to try and minimize the negative impacts associated with construction.

4.3 Diversifying the economic base in the downtown

The COVID-19 pandemic accelerated a number of trends that have been impacting downtowns across North America. One big trend is that office-related work is becoming more distributed. While many firms and organizations still prefer to bring together professional and administrative workers in a central location, others are now pursuing hybrid models that allow for either fully remote working or options that mix office and home-based work. Another trend that pre-dates the pandemic has been the move of retail shopping out of the downtown. Big box retailers, large suburban shopping malls and outlet malls have eroded downtown's role as a central hub for retail activity. Even downtown as a tourist destination has been challenged with the rise of more eco-tourism and a focus on the natural environment as a driver of visitor traffic.

To ensure the downtown can thrive and prosper moving forward it will need to diversify its economic base. The downtown will always be a hub for office activity. Very few envision a future without office work altogether but a prosperous future for downtown will be based on a wider base of economic activity. This means more population living in the downtown. Many other cities are working to broaden the base of population living in the downtown to include young families and other demographic groups. London will need to attract more services to support the downtown population. Residents reported that they want more grocery options downtown, more artisanal shops, clothing stores, restaurants and arts and cultural activity.

A more diversified downtown economy moving forward means boosting the number of people that come downtown to shop, access services, eat and drink, and attend activities and events. Many will still come for work but many more will congregate in the downtown because of its unique and complementary mix of retail, services, entertainment, arts, food and drink and accommodations.

What is the role of **Downtown London** to help diversify the downtown economic base? Again, there are many partners that are involved in efforts to attract people downtown to live and to play. For example, **Downtown London** could address this strategic priority by:

- Supporting efforts to attract population by making a strong case and promoting the opportunities of living downtown.
- Advocating with the city to invest in infrastructure that bolsters the case for living in the downtown. This could include better signage connecting downtown to the river or investing in family-friendly infrastructure and services.
- Helping partner organizations such as the LEDC to attract industry to the downtown where there is mandate alignment (e.g. attracting tech firms, film production and digital media firms).
- Working with partners to expand entrepreneur incubation and scale up services in the downtown.
- Supporting and celebrating downtown's role as a centre for music, arts and culture.
- Working with partners to attract more events and activities to the downtown.
- Leading initiatives to attract specific services wanted by downtown residents (e.g. a grocery store).

4.4 Strengthening partnerships

Many different organizations have a role in the success of the downtown. First and foremost is the City of London. Through its Core Area Action Plan and other initiatives, the City is investing in the downtown and working on many of the issues that are of paramount interest to the members of **Downtown London.** There are many other partners in addition to City Hall.

The London Economic Development Corporation is working to attract industry and investment to the region. From the information technology cluster to film development, much of this investment should find its way into the downtown but **Downtown London** will need to work with the LEDC to ensure the value proposition is strong. Tourism London is working hard to rebuild visitor traffic to the region in the wake of the pandemic. Many of the region's top tourism assets, hotels and best restaurants are located in the downtown. Fanshawe College has provided a significant boost to the downtown and Western University is interested in strengthening its role moving forward.

The real estate development community will be critical to ensuring investment occurs downtown in the years ahead. The London Police Force is a vital partner in support ensuring a safe and attractive downtown. The London Arts Council is a champion for the arts sector, bringing vibrancy and people into the downtown.

What is **Downtown London's** role in building stronger partnerships among the key organizations that influence the development of the downtown? **Downtown London** has an important role to play engaging with these different organizations to ensure the downtown can thrive in the years ahead. For example, it can support this priority by:

- Formalizing the relationship with City Hall. Given the strategic importance of the downtown to the city and to the Downtown London, a more formal relationship should be established. Ideally this working group or committee would be made up of key city staff involved in downtown development.
- Establishing some form of a committee or formal relationship of key stakeholders. This group would meet on a regular basis to discuss initiatives and address any challenges or opportunities that arise.
- Regularly reporting on and celebrating the successes of all partners.

4.5 Expanding **Downtown London's** role as Downtown Champion

While there are many important partners, no other organization is as uniquely qualified and mandated to be the unabashed champion of downtown London. **Downtown London** is ideally positioned to report on the state of the downtown and its opportunities and challenges. It can celebrate the downtown and tell its stories like no other organization. The role is much broader than providing input on planning policy. The City's decisions on parks, affordable housing, transit, garbage pick-up, safety and engineering all impact **Downtown London** and its members.

Downtown London should provide thoughtful and informed opinions on City policies, programs and regulations that affect the downtown as an ally and voice for its members. It can promote opportunities in the downtown far and wide. As examples, **Downtown London** can address this strategic priority by:

- Establishing a marketing and communications plan with clear messages targeting internal and external audiences.
- Ensuring the City has consistent feedback from the business community.
- Commissioning surveys and research that support successful downtown development.
- Organizing events and gathering partners to address key challenges and opportunities
- Being the go-to organization for information and insight on the downtown economy and population.

The Future of MainStreet London

During the stakeholder consultations the Mellor Murray Consulting team heard that many of **Downtown London**'s stakeholders were unaware of the purpose of MainStreet London or were confused as to the distinction between the roles of MainStreet London and the LDBA. The team heard that some partners felt that MainStreet London was no longer performing the role envisaged for the organization when it was first established. Most people felt there was an opportunity to reimagine MainStreet London, perhaps as an organization independent from the LDBA.

One alternative that is available for use in Ontario is an economic development corporation. This alternative is used less frequently in Ontario downtowns[3] than in some other Provinces such as Manitoba and Alberta due in part to the success of BIAs working in collaboration with municipalities and other partners. Under Section 203 of the Municipal Act, a downtown economic development corporation could be responsible for things like: site acquisition, development and disposal for certain uses, including residential uses; the provision and management of general parking facilities; and the provision of culture and heritage systems. These areas are consistent with suggestions that were made by stakeholders during the consultations.

Accordingly, one suggested strategic direction for **Downtown London** to pursue would be to separate MainStreet London from **Downtown London** and the LDBA and establish them as independent organizations. MainStreet Lonnndon's mandate would be to pursue one or more of the above-noted responsibilities and complement the work done by the LDBA, the City of London, the London Economic Development Corporation and other stakeholders.

4.6 Supporting the members

Supporting the businesses, property owners and economic activity in the downtown London catchment area is a fundamental priority for the LDBA. There are more than 700 individual businesses in the downtown BIA area ranging from small retail shops to companies with more than 500 employees. The LDBA has always had a mandate to support these businesses with specific services while supporting them more broadly with activities meant to support the downtown as a whole (e.g. events). For example, the LDBA can address this strategic priority by:

- Continuing to develop and promote the online marketplace.
- Promoting downtown businesses through traditional media, social media and other innovative channels.
- Providing access to grant and support programs.
- Implementing buy-local campaigns and other marketing campaigns.
- Developing programs such as Downtown Dollars.
- Generating activity and visitation in the downtown.
- Encouraging LDBA members to collaborate.

4.7 Operational alignment with the strategic priorities

Downtown London has an annual budget of approximately $2 million and nine staff. One of the challenges with any new strategic plan is the alignment of resources to address strategic priorities. The **Downtown London** Strategy will include a series of goals and objectives to achieve the mission of the organization and work towards the vision of a prosperous downtown. It will also outline a

[3] The Downtown Brampton Economic Development Corporation (disbanded in 2015) and the Sudbury Downtown Village Development Corporation are two that come to mind

series of action items and initiatives for each objective and discuss how to effectively resource these actions.

5 Next Steps

This SWOT and Strategic Priorities report marks the end of Phase 2. The strategic priorities identified in this report will be reviewed, refined and established during a strategic priorities workshop.

Downtown London's Strategy will include the establishment of a vision, mission and values. The goals and objectives are based on the strategic priorities and provide the framework for the strategic actions for **Downtown London**.

These actions will include recommendations for **Downtown London**'s governance, operations and marketing. Once these actions have been confirmed, the Mellor Murray team will work with **Downtown London** staff to establish an Implementation Plan including the action lead, timing, priority level and estimated budget. The Implementation Plan will also include recommended performance measures to track overall economic and demographic metrics for the downtown and those measures that will track progress towards **Downtown London**'s goals and objectives.

Phase	Element	Description
Strategic Plan	Vision	An aspirational statement of where the organization wants to be in the future.
	Mission	A statement of who the organization is, what it does, for who and how.
	Values	The core principles and behaviours that guide and describe the organization's culture.
	Goals	Broad based strategies needed to achieve the organization's mission.
	Strategic Objectives	Specific, measurable, action oriented, realistic and time bound strategies that achieve the organization's goals and vision.
	Specific Actions	Specific actionable items that are assigned to individuals or organizations to achieve.

Phase	Element	Description
Implementation Plan	Action Lead	The individual or lead responsible for implementing the specific action
	Timing	Ongoing, immediate, short-term (within 12 months), mid-term (1 to 3 years), long term (3 to 5 years)
	Priority	Critical – must do, High – important, Medium – Good to do
	Budget	The cost to implement the project
	Performance Measures	A measure of the output or outcome related to the specific strategic objective

Downtown London
123 King Street, London, ON N6A 1C3
www.downtownlondon.ca