



THE VALUE OF INVESTING IN CANADIAN DOWNTOWNS

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Canadian
URBAN
Institute



International Downtown Association

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Downtown Charlottetown Inc
The City of Charlottetown
The City of North Vancouver
The Downtown Windsor BIA
The City of Windsor
The City of Hamilton
Downtown Hamilton BIA
City of Kingston
Downtown Kingston! BIA
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Downtown Vancouver BIA
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The Partnership - Saskatoon
City of Saskatoon
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City of Winnipeg
City of London
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Downtown Yonge BIA
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Core Team:

Glenn Miller, Vice President of Education and Research, Project Manager
Katherine Morton, Senior Planner - Economics and Research
Project Lead
Tom Weatherburn, GIS Analyst
Christine Meehan, Planner - Education and Research

Research Team:

Thevishka Kanishkan, Book Design & Data Visualization
Hoda Matar, Researcher
Georgia Luyt, Researcher
Tiffany Ing, Researcher
Julie Nguyen, Researcher

Tanya O'Brien, Dyne Holdings Limited
Jason Lee, Spry Consulting
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Mike Cochrane, Confederation Centre

Hamilton

Glen Norton, City of Hamilton
Jeff Paikin, New Horizon Homes
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Susan Braithwaite, International Village
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Scott Burke, The Downtown Windsor BIA
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Mayor Edie Francis, City of Windsor
Fulvio Valentinis, City Councillor
Mark Lalovich, Remax
Paul Twigg, Retailer/Business Owner

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Richard White, City of North Vancouver
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TABLE OF CONTENTS

- INTRODUCTION 6

- KEY FINDINGS 16
 - VISIBILITY 18
 - VISIONARY 24
 - PROSPERITY 34
 - LIVEABILITY 52
 - STRATEGY 64

- QUICK WINS 72

- APPENDIX 1 - PROJECT DESIGN 86

- APPENDIX 2 - BIBLIOGRAPHY & PHOTO CREDITS 98



Downtown Regina, SK



Downtown Kingston, ON

WHAT IS “THE VALUE OF INVESTING IN CANADIAN DOWNTOWNS”?

The Canadian Urban Institute (CUI) has been engaged by the International Downtown Association – Canadian Issues Task Force to carry out one of the most significant reviews of Canadian downtowns to date.

This ‘living’ project is the first of its kind – examining 17 downtowns across Canada to assess changes in attitudes, perceptions, functionality and performance over time. This project is envisaged to act as a resource for city builders, compiling evidence-based research that illustrates the importance of investing in downtowns. It also aims to inspire and inform city builders, with many excellent and innovative approaches to downtown revitalization and the various efforts that are being applied across the nation.

As part of this publication, this research examines downtown Charlottetown, Kingston, Hamilton, St.Catharines, Windsor, Regina and North Vancouver. The earlier round of this research issued in May 2012 examined Halifax, Fredericton, Ottawa, Toronto, London, Winnipeg, Saskatoon, Edmonton, Vancouver and Victoria. As part of this publication, findings from both studies have been integrated to provide readers with an extensive picture of the contribution being made by downtowns across Canada.

This project will continue to grow with research being conducted in downtown Timmins, North Bay, Sudbury, Sault Ste Marie and Thunder Bay. All of these research efforts, when combined, are powerfully contributing to our collective knowledge of the value of investing in Canadian downtowns.

WHAT ARE WE TRYING TO DO?

Every downtown featured in this report is unique. A number of downtowns play multiple roles, which has a bearing on their economic performance and relative importance within the wider city.

Several downtowns carry the responsibility of being a Provincial Capital. Others function as international and regional gateways or transportation and economic hubs. Some cities have had to reposition themselves, and therefore their downtown, in light of dramatic shifts in the economic focus of their province or the country.

The project has been designed to account for these differences. This report assesses and summarizes the complex dynamics of city building – and downtown resilience – with 17 downtown case studies analyzed through five common criteria.



1) MEASURE THE PERFORMANCE OF CANADIAN DOWNTOWNS

This project aims to measure the economic, social, and cultural health of 17 downtown study areas. To achieve this aim, CUI (with the support of our project partners) developed five principles that contribute to a successful downtown, and then assembled extensive time series data sets to measure how well each downtown is performing relative to each of these principles. Analysis of these data sets provides city builders with information (in many instances for the first time) on the levels of growth and investment happening in their downtown.

2) BENCHMARK THE PERFORMANCE OF CANADIAN DOWNTOWNS

The project also aims to compare the performance of all downtown case study areas. To this end, the downtowns have been assessed against the same principles and data has been consistently collected (i.e. where possible, data is drawn from the same sources and time periods) for each of the 17 downtown case studies to maximize opportunities for comparability. This provides important information to city builders to gauge how their downtown is developing relative to other downtowns across Canada.

3) ASSESS MUNICIPAL CAPITAL INVESTMENTS IN CANADIAN DOWNTOWNS

This project demonstrates the level and type of investments in the various downtowns. Our project partners took on the immense task of assembling municipal capital project data from the past decade. These data sets provide downtown stakeholders with information on the level of priority being given to their own downtowns, as well as the level of downtown investment across Canada.

4) SHARE SUCCESS STORIES FROM CANADIAN DOWNTOWNS

The project also shares success stories to help Canadian downtowns overcome the challenges they face, to ensure they can prosper into the future. This project showcases the most beneficial and innovative programs and policies being implemented by municipalities and/or business improvement districts in downtowns across Canada.

5) CREATE A BASELINE FOR FUTURE DATA COLLECTION

Few municipalities in Canada collect data specifically relating to their downtowns. This project highlights the importance of collecting data on the health of Canada's downtowns and the need to commit to this practice in the future. This study approach has been designed to be dynamic and flexible to fulfill the goal of creating a baseline for the health of Canadian downtowns that can be expanded and developed long into the future.



HOW WILL WE DO IT?

One of the most critical elements of the project design was the development of five principles that underpin a successful downtown in Canada. The principles developed were sufficiently broad to account for the uniqueness of every downtown case study, but specific enough to create a platform for comparison.

The CUI developed indicators and a range of metrics to measure performance of the downtowns against each of these principles. CUI developed these principles using a three-pronged approach.

First, the project team surveyed CUI staff and Board members to determine ‘What Makes a Downtown Great?’.

Second, the team undertook a detailed literature review to consider how others had developed principles relating to urban growth. The project team was particularly influenced by Michael A. Burayidi’s (2001) text, *Downtowns: Revitalizing the Centers of Small Urban Communities*. From this text, passages from Kent Roberston of Saint Cloud State University were used to help further articulate and define the principles.

Third, the principles were tested throughout the research to ensure that they were being reinforced by the research findings.

**FROM THIS BACKGROUND RESEARCH,
CUI DEVELOPED FIVE PRINCIPLES FOR A
SUCCESSFUL DOWNTOWN.**



VISIBILITY

Does the downtown have an integral and central role in the life of the wider city?

In the context of ongoing city growth and expansion, a downtown can suffer declining interest from the public and private sector. To measure how well a downtown is performing against this principle, the CUI team undertook interviews to learn about the history and make-up of each downtown - its role, function and vitality and the contribution the downtown makes to the wider city.



VISIONARY

Does the downtown benefit from a multiplicity of strong, bold leaders who collaborate to achieve and sustain a shared vision?

Strong leaders, a bold vision and a high degree of collaboration are critical ingredients for a downtown to achieve its potential. To measure the strength of the vision in each downtown, the team analyzed the perceived effectiveness of downtown plans and policies, the level of priority being given to the downtown, as well as attitudes towards collaboration between the public and private sector.



PROSPERITY

Does the downtown have a robust and innovative economy?

A cornerstone of a strong downtown is a prosperous and diverse economy. To measure the strength of a downtown's economy, the team tracked property and financial data, both downtown and city-wide and analyzed how this has changed over time.



LIVEABILITY

Is the downtown vibrant, liveable and connected?

A liveable core contributes to a downtown's vibrancy and attractiveness and can cement its place as the literal and symbolic heart of the city as a whole. To measure liveability, the project team considered how people use, move around and enjoy the downtown core.



STRATEGY

Is the city investing strategically in its future?

Strategic investments are important, as they leverage further investments. To measure the degree to which investments have been made strategically, CUI examined the type, value and location of public investment, as well as how various investments fit together to complement and support each other.

HOW DO WE DEFINE A DOWNTOWN?



The responsibility for defining downtown boundaries lay with the project partners, given their intimate knowledge of their city and their role in collecting the data to support each case study.

Having said this, the project partners had to balance these various expectations and other key considerations in selecting this boundary. CUI provided support to each project partner to create a boundary that made sense for each city.

The preferred approach was adopting the working definition of “downtown” used by the relevant municipality. Yet where the municipality had not created a definition of the “downtown” or where this definition would create challenges for the data collection, CUI developed general criteria to guide the creation of the boundaries.

DEFINING DOWNTOWN BOUNDARIES IS A MAJOR CHALLENGE, AS EACH PERSON LIVING IN A CITY HAS A DIFFERENT UNDERSTANDING OF DOWNTOWN BASED ON THEIR PERSONAL EXPERIENCES.

1) The downtown boundary had to include the City’s financial core.

2) The downtown study area had to include diverse urban elements and land uses.

3) Where possible, CUI recommended a hard edged boundary such as major streets or train tracks, or a natural feature such as a body of water.

4) An overarching consideration was that data compiled should align with the selected downtown study areas.

The project has also been designed to balance the challenges that come with each city determining their own boundaries. For example, some cities decided on more generous boundaries than others. To balance this, CUI measures trends over time (% growth) and intensity factors (for example population and jobs per hectare) and places these numbers alongside raw numbers to allow for a clearer picture of downtown activity.

Additionally, in the downtowns where a more conservative boundary has been selected, the project team has provided significant commentary about key assets, pieces of infrastructure and residential communities just beyond downtown boundaries.

“ FROM WHAT I SEE, DOWNTOWN MUST BE MANY THINGS TO MANY PEOPLE. YOU NEED ABOUT 10 SOLID REASONS TO COME DOWNTOWN...IT MUST BE APPEALING TO ALL AGE CATAGEORIES AND INTERESTS. ”





Interviewee, City of Windsor



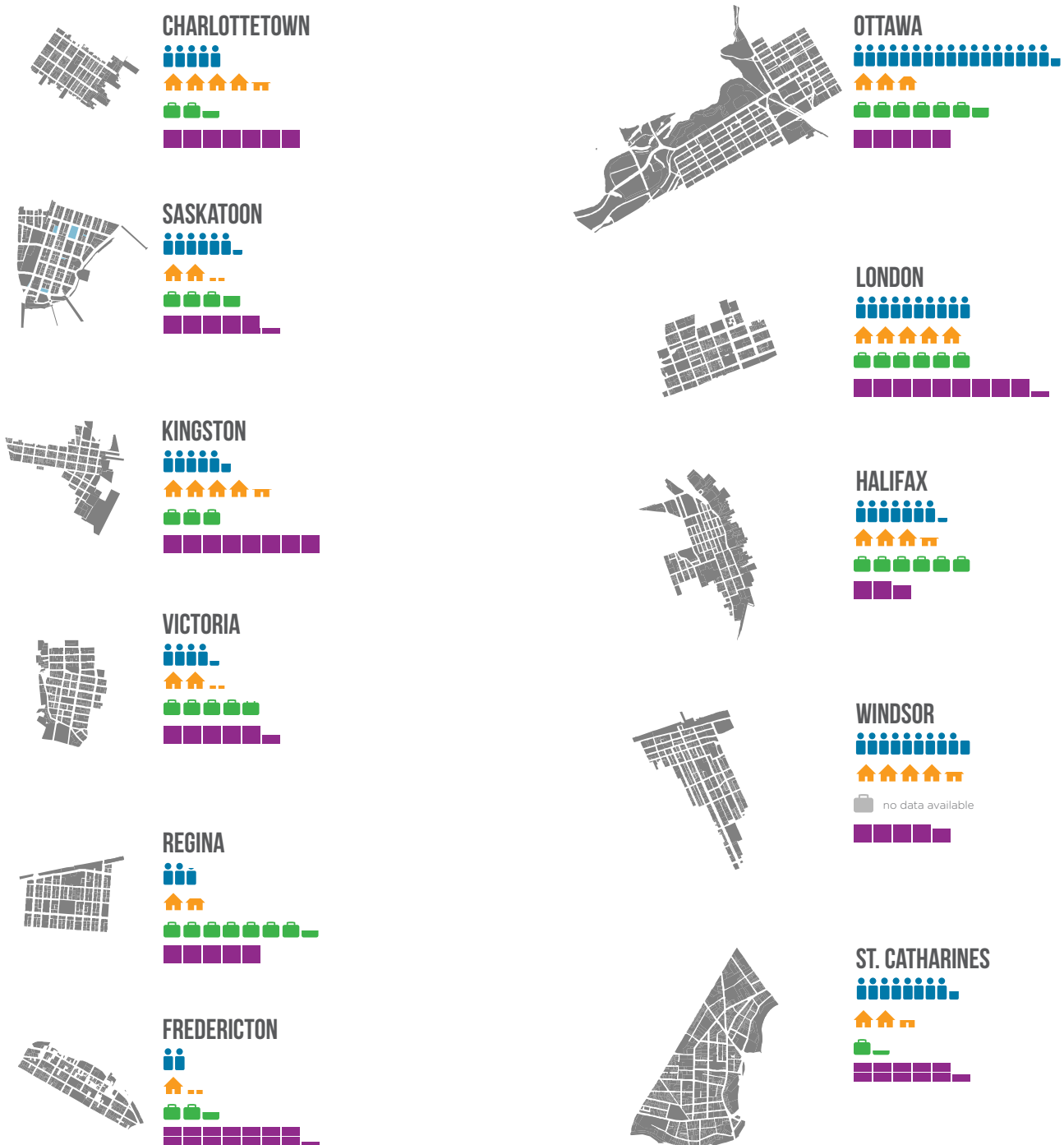
DOWNTOWNS AT A GLANCE

*Cities are presented in no particular order
*Values are from 2011 census data & data provided by city partners

LEGEND

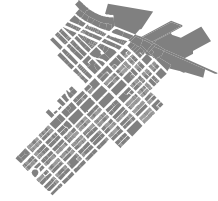
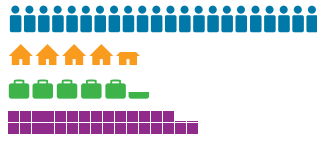
- Population  = 500 people
- Population Density  = 10 people / ha
- Job Density  = 50 jobs / ha
- Average Block Sizes  = 0.25 ha

SCALE

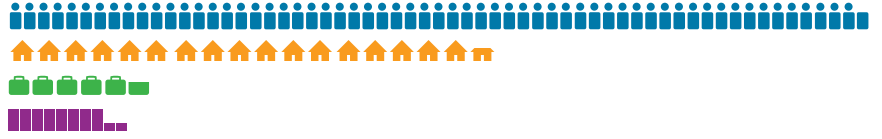




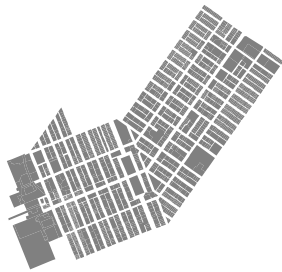
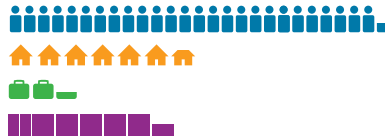
EDMONTON



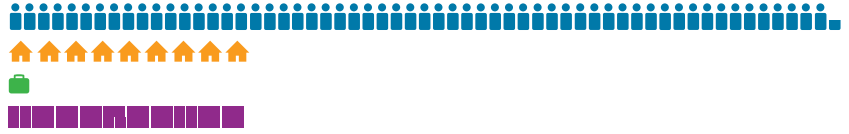
VANCOUVER



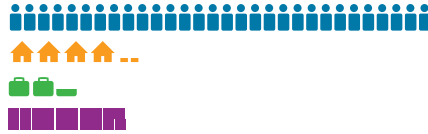
HAMILTON



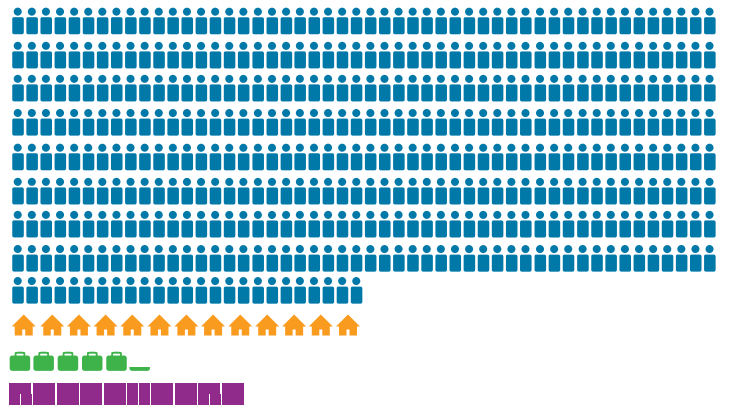
NORTH VANCOUVER



WINNIPEG



TORONTO



This analysis was designed to provide city builders with clear and accurate information on the levels of growth and investment happening in their downtown. The study has now examined 17 downtowns of varying sizes, scales and functions across Canada since publishing the first report in May 2012. And we have learned a few key findings about downtowns along the way.

The majority of the downtowns examined underwent a period of renaissance and are now more livable complete communities that encourage walkability, cycling and transit use. This study has documented the increasing popularity of living in urban centres driven by a growing preference to live closer to work, to walk grocery stores and other amenities, as well as have a variety of recreational and entertainment opportunities. Almost all of the downtowns experienced positive levels of residential dwelling growth between 2001 and 2011. This increased residential development is bringing back vitality to downtowns while providing more diverse housing options.

Promising trends for downtown retail are also emerging. In the same way that retailers followed residents out to suburban areas in the post war era, retailers are now following people back into the core. New large format stores downtown, with a more compact layout and less parking reflect a more 'urban' lifestyle. Downtowns have also been able to maintain their concentration of office space and hold their position as 'the heart of commerce' in their respective cities. Most have managed to retain over half of their city's office space inventory.

The economic rationale for investing in downtowns is clear. The findings of this research demonstrate that although the downtowns studied generally occupy less than 1% of citywide land area, they are making a major contribution to the city's bottom line. The economic importance of downtown is also reflected in the high levels of investment they have received over the past decade. As a portion of citywide investment, downtowns have attracted on average one fifth of city-wide construction value between 2003 and 2011. The downtowns studied have also seen some major public investments in new forms of housing, enhancing heritage features and improving aging infrastructure over the last decade.

However, some worrisome national trends have emerged. Although, the downtowns studied have seen significant capital investment, they are generally receiving well under 5% in citywide capital investments when averaged over a decade. This investment must be considered alongside the fact that these same downtowns are responsible for generating one tenth to a quarter of the cities' tax revenues. Another emerging trend is the fact that downtowns are representing a declining portion of the City's assessment base, even though the downtown's assessment value has been increasing over the last decade.



KEY FINDINGS

The project team developed the following key findings with respect to the overall performance of the 17 downtown case studies, guided by the five principles for a successful downtown. It should be noted however, that these findings emphasize the seven cities that have been studied as part of this second phase of the project (Charlottetown, Kingston, Hamilton, St. Catharines, Windsor, Regina and North Vancouver).



VISIBILITY



**DOES THE DOWNTOWN HAVE AN
INTEGRAL AND CENTRAL ROLE IN
THE LIFE OF THE WIDER CITY?**



“ THE COMMUNITY DOES SEE THE VALUE OF THE DOWNTOWN. REALLY THE DOWNTOWN IS THAT AREA THAT DISTINGUISHES US FROM OTHER CITIES. IT IS THE AREA PEOPLE SEE WHEN THEY COME TO REGINA. ”

Interviewee, City of Regina



DOWNTOWNS ARE SMALL NEIGHBOURHOODS THAT ‘PUNCH ABOVE THEIR WEIGHT’

Downtowns generally occupy less than 1% of city-wide land area, yet attract an average of 20% of city-wide construction value. The 17 downtowns examined through this research are uniquely shaped by their historic circumstances, their size, functionality and geographic context.

Despite the differences between the downtowns across Canada, they share many commonalities and have undergone a similar evolution; from their position of dominance which lasted until the 1950s, their decline through the post war years; and an exciting period of renewal from around the 1980s extending through to today.

The downtowns studied are all the ‘heart of commerce’ in their respective cities. They are all important locations for employment, offering a diverse range of jobs to the population at large. The downtowns accommodate a significant concentration of office space, and most have retained over half of their City’s office space inventory. Downtowns are also important retailing destinations, often providing a more traditional shopping experience.

The economic importance of downtowns is also reflected in the high levels of investment they have received over the past decade. Already serviced by infrastructure, these downtowns are economically and geographically efficient places to absorb new growth. This construction activity is adding to the significant contribution these downtowns are making to their municipality’s bottom line.

The downtowns are accommodating a growing population base, with their population sometimes doubling between census periods. This renewed interest in living downtown has been driven by a growing preference (particularly among younger generations) to be closer to work, to be able to walk to buy groceries and run errands, as well as have a variety of recreational and entertainment opportunities close at hand. Downtowns will play a critical role in offering this increasingly desirable ‘urban’ living environment to future generations.

These downtowns are highly visible and valued by the population of the wider city as hubs for social and cultural activity. The downtowns all contain concentrations of historic, civic and institutional buildings, entertainment and retailing facilities. They are highly accessible and walkable, connected to a strong ring of inner neighborhoods, and are generally at the centre of their city’s transportation network. This clustering of activity contributes to the quality of place offered by these urban centres.

Overall, these 17 downtown neighbourhoods are ‘punching above their weight,’ re-asserting and re-establishing themselves in ways that could not have conceived of just a few decades earlier. These downtowns are critical places for their local economy, for innovation, for learning and for bringing their communities together to grow a local identity.



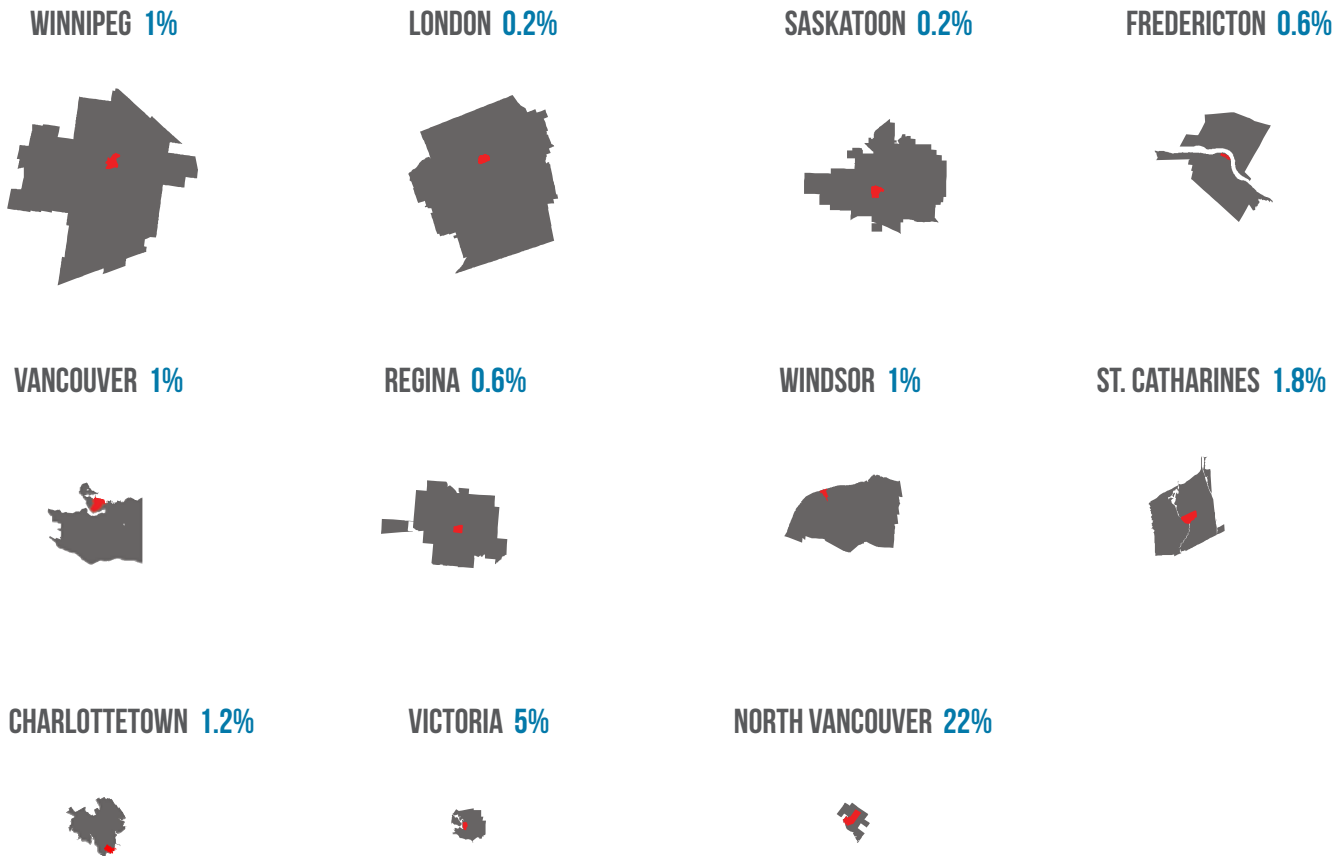
VISIBILITY OF DOWNTOWNS IN THEIR MUNICIPAL CONTEXTS

*Cities are presented in no particular order

LEGEND

- Downtown core
- Municipal boundary
- % Downtown's % of total municipal area

SCALE



DOWNTOWN AREA, RANKED FROM LARGEST TO SMALLEST :

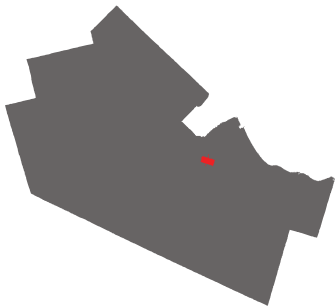
TORONTO	WINNIPEG	NORTH VANCOUVER	OTTAWA	EDMONTON	HAMILTON	ST. CATHARINES	VANCOUVER
1618	360	323	307	242	202	173	172

*Area is in hectares

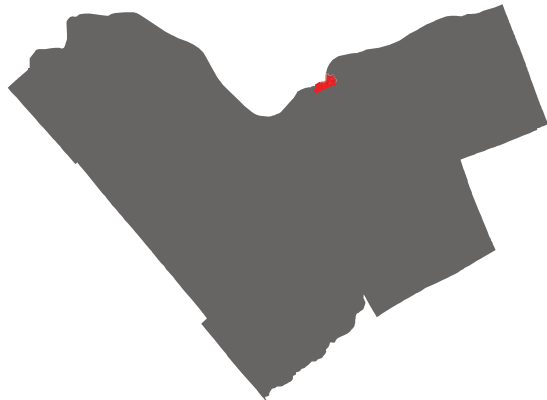
HALIFAX 0.0012%



HAMILTON 0.2%



OTTAWA 0.1%



TORONTO 3%



KINGSTON 0.1%



EDMONTON 1%



SASKATOON
117

WINDSOR
105

LONDON
99

VICTORIA
98.3

HALIFAX
98

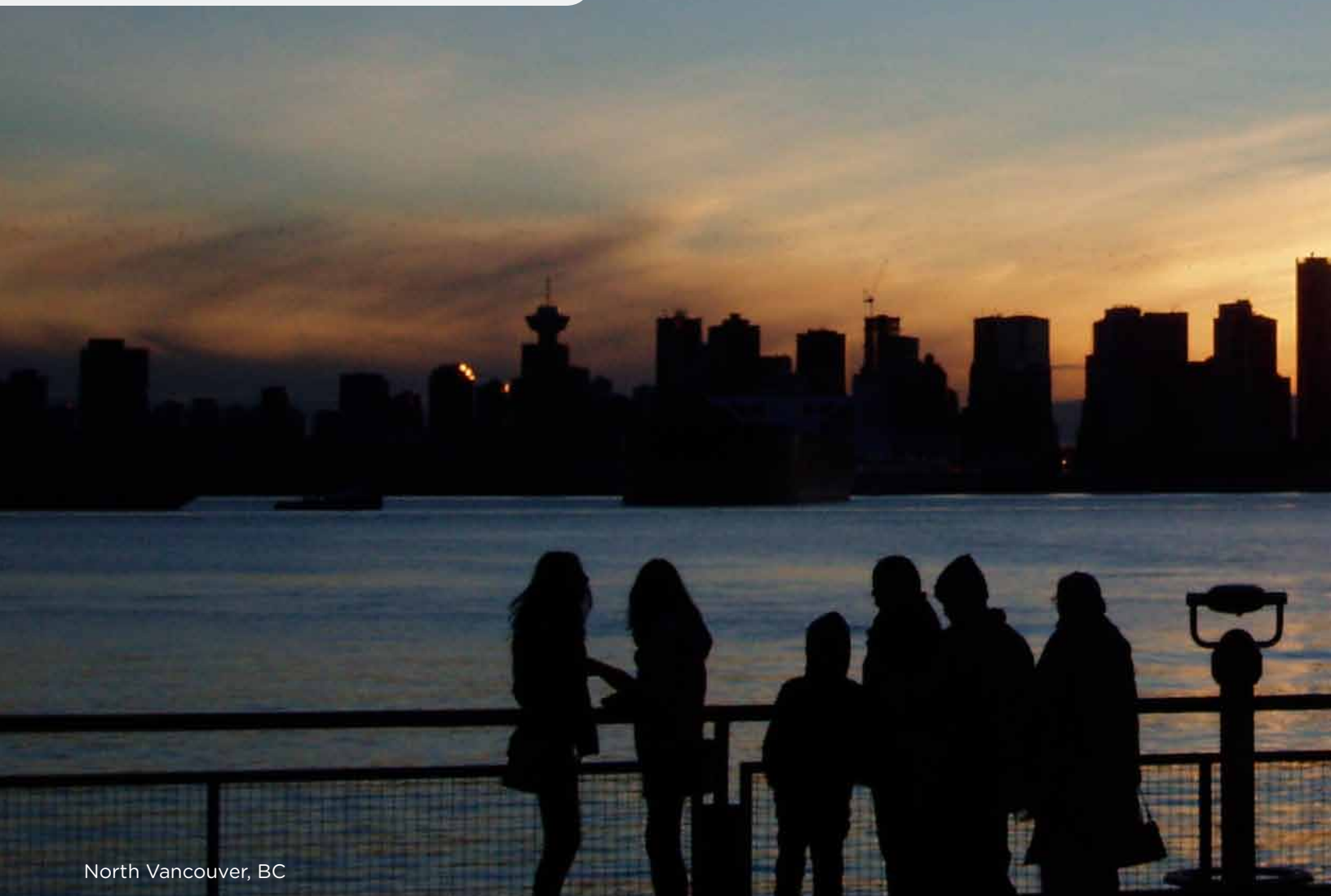
FREDERICTON
82

REGINA
82

KINGSTON
59

CHARLOTTETOWN
54

VISIONARY



North Vancouver, BC



**DOES THE DOWNTOWN BENEFIT
FROM A MULTIPLICITY OF
STRONG, BOLD LEADERS WHO
COLLABORATE TO ACHIEVE AND
SUSTAIN A SHARED VISION?**

DOWNTOWNS WITH A CLEAR, FLEXIBLE, AND UNIFYING VISION TEND TO HAVE THE MOST MOMENTUM BEHIND THEIR REVITALIZATION EFFORTS

A clear vision is important to guide both decision makers and the many individuals responsible for its implementation. For example, several interviewees in Vancouver noted that they envisaged the core as 'a downtown for people.' This is not only a simple and inspiring idea but it simultaneously provides a framework for determining priorities.

A flexible vision is also important to support the interests of diverse stakeholder groups at work in the core, as well as allowing for it to be adapted to reflect changing circumstances and attitudes in the downtown.

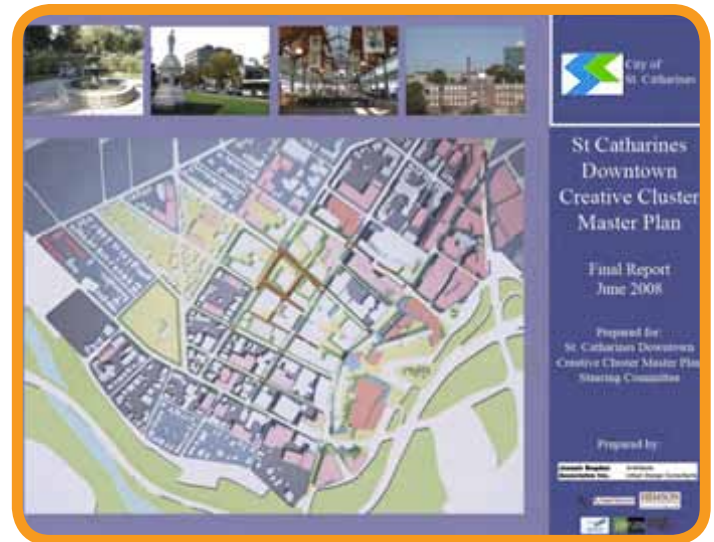
A unifying vision is important for attracting enthusiasm, excitement and momentum. Above all, a unifying vision guides stakeholders and connects them with resources and to each other.

A VISION BY ITSELF IS NOT ENOUGH - REVITALIZATION NEEDS PATIENCE, PATIENCE, AND MORE PATIENCE

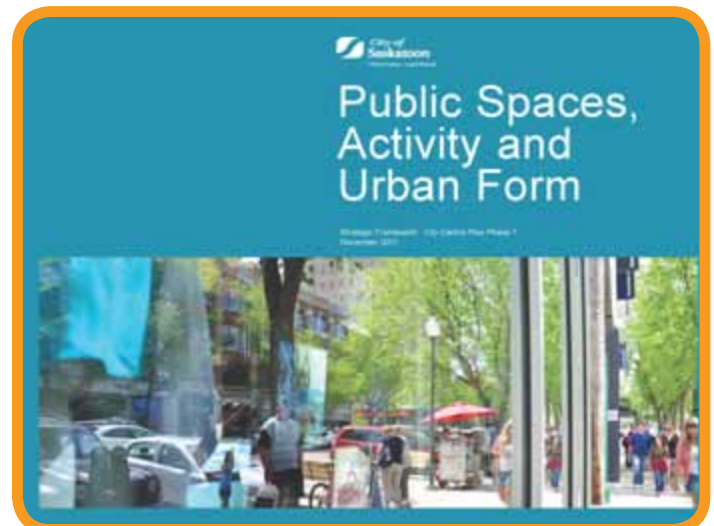
The downtowns that have achieved the most success and transformation have been patiently committed to revitalization efforts for decades.

They have pursued their vision over many political cycles. Moreover they have adapted their vision to reflect changes in trends, attitudes, land uses and activities taking place in the core and across the city. Interviewees from almost every downtown case study discussed the need for patience when achieving a vision, commenting that they had watched their downtown decline over several decades (around the 1950s-80s) and that this could not be turned around overnight.

They also acknowledged that downtown revitalization must be understood as a continuous process, a race that never ends, due to the cyclical process of renewing urban economies.



St. Catharines Downtown Creative Cluster Master Plan



Saskatoon has now developed a detailed inventory of its public realm.

“ **THE DOWNTOWN IS THE KEY TO PULLING THE CITY TOGETHER AGAIN...COUNCIL HAS TAKEN ON A MANTRA THAT THE DOWNTOWN WILL BE HEALTHY, WEALTHY, AND VIBRANT.** ”

Interviewee, City of Saskatoon



STRONG AND STRATEGIC PARTNERSHIPS ARE CRITICAL TO REALIZING VISIONS

Several interesting partnership models have been established that have given rise to increased investment activity and vitality.

For example, the Charlottetown Area Development Corporation (CADC) is owned largely by the Province of PEI, in partnership with the City of Charlottetown and the Town of Stratford. The CADC is an organization that attracts private sector commercial development and investment opportunities in Charlottetown. It has championed the renewal of downtown Charlottetown's waterfront and has recently spearheaded the development of the new Charlottetown Convention Centre.

The City of St. Catharines and the City of Windsor have both built strong partnerships with local post secondary institutions, as well as provincial levels of government, to allow for the downtowns to emerge as critical centres for learning.

In downtown Halifax, the Strategic Urban Partnership provides a forum for stakeholders to meet and discuss new developments and partnership opportunities. This forum has been highly successful at connecting key stakeholders from different sectors and organizational backgrounds.

In Ottawa, the National Capital Commission, City, and private sector interests have worked to build an influential partnership.

Similarly, Edmonton created the Downtown Vibrancy Taskforce comprised of 'blue ribbon' businesses, community, and social agencies that work together to prioritize and implement catalytic projects identified in the downtown master plan.

Winnipeg has also established an arms-length agency Centre Venture, which has had tremendous success at forming the partnerships and conditions needed to realize major investments and redevelopment projects.

The importance of partnerships cannot be underestimated when working to implement a specific downtown master plan and its accompanying vision.

GAIN SUPPORT FROM ALL LEVELS OF GOVERNMENT

Federal and Provincial levels of governments play a key role in city building. One important and direct way they contribute to the strength of cities is where they decide to site their offices and service centres. Capital cities like Charlottetown and Regina have long benefited from having a strong concentration of provincial office buildings located in their downtown cores. However, it is important that governments show leadership by continuing to bring jobs to these urban centres.

In Charlottetown, several interviewees expressed concern over a recent decision to move some federal government offices and nearly 600 employees to a neighbourhood further from the core.¹

Another example can be found in St. Catharines, with the relocation of the Niagara Regional Police Service headquarters from the downtown to a high-way location, extracting 380 employees out of the core as well as an estimated \$22 million in potential expenditure over the next 20 years.² In addition, the downtown Passport Office (with 23 employees) relocated to a suburban mall.

These decisions not only undermine revitalization efforts in St. Catharines, but also negatively impact the downtown's ability to fulfill its provincially mandated role as an Urban Growth Centre.

A similar example can also be found in Kingston, where the downtown has just seen their Kingston Police Head Quarters and Services Ontario office move out of the downtown; the latter moving to a suburban location only accessible by private automobile. Kingston's Limestone District School Board is also considering the closure of four of its inner city schools. Even with all the strong provincial policies in place to push urban revitalization efforts forward in these downtowns, these decisions are inconsistent with this forward momentum.

There are many excellent examples of strong leadership from all levels of government in downtown revitalization efforts. However, it is important that the benefits stemming from one good initiative are not undone by the next.



The Charlottetown Convention Centre; a project spearheaded by the Charlottetown Area Development Corporation (CADC)

ACHIEVING MORE COMPACT, EQUITABLE AND SUSTAINABLE CITIES CAN BE ACCOMPLISHED BY BUILDING ACCESSIBLE GOVERNMENT FACILITIES IN LOCATIONS THAT CAN SUPPORT A CRITICAL MASS OF RESIDENTS AND BUSINESSES.

¹ Fisheries and Oceans Canada (2010, July 16). Fisheries and Oceans Canada to Relocate within Charlottetown Area. Retrieved from <http://www.dfo-mpo.gc.ca/media/npress-communique/2010/hq-ac40-eng.htm>

² Memorandum provided by the Downtown St. Catharines Association (November 7, 2012)

ENGAGE IN ‘DOWNTOWN-SPECIFIC’ PLANNING PROCESSES

Many of the downtowns examined have ‘downtown-specific’ master plans in place. As well as setting out a vision, these master-planning processes can be invaluable for bringing together stakeholders, building trust and identifying opportunities for growth, which can in turn unlock development potential in the downtown.

These plans can send a signal to both the public and private sectors that the downtown is an important priority for government and that it is ‘open for business.’

St. Catharines’ Downtown Creative Cluster Master Plan was so clear in the vision it laid out for the core that one interviewee described it as being the “backbone of every decision made.” The plan was also critical in helping to secure several major government grants to develop key pieces of infrastructure, as well as for strengthening partnerships between the City and its post secondary institutions to develop the new Performing Arts Centre.

In downtown North Vancouver the City undertook planning processes for the redevelopment of several key City-owned sites in Lower Lonsdale. The result of these planning processes was a detailed development concept that had regard for the downtown context and was supported by the community at large. This process allowed for the private sector to purchase the land with all of the appropriate approvals in place.

It was also emphasized by interviewees that it is critical for these downtown plans to be underpinned by an investment or implementation strategy to make sure that the great ideas contained in the plan can become a reality.

**THE EMERGING CONSENSUS IS THAT
DOWNTOWN-SPECIFIC PLANNING
PROCESSES ARE HIGHLY BENEFICIAL AND
ABLE TO UNIFY STAKEHOLDERS.**

DEVELOP ‘LOCAL’ APPROACHES THAT WORK FOR THE COMMUNITY

There is no ‘one size fits all’ approach to realizing a stronger downtown. However, the downtowns that have seen the most transformation have all carefully considered their local circumstances and built on their strengths.

For example, downtown Windsor saw an opportunity to grow its post secondary sector; and the City and all levels of government have worked with St Clair College and University of Windsor to see the emergence of four new satellite campuses. This is a tremendous achievement that will likely redefine Windsor’s urban core in the years to come.

St. Catharines can boast similar successes from partnerships with post secondary institutions. The downtown also recognized its strength as a tourist destination, given its proximity to Niagara Falls, the USA, the Niagara Wine Region and other important tourism assets.

The downtown will soon capitalize on this strategic location, by being incorporated into the Niagara Wine Route opening up all manner of new economic development opportunities. Charlottetown has also built on the strength of its tourism industry. The downtown has seen its waterfront transformed over recent decades and recently opened its new waterfront convention centre.

Downtown Hamilton has also built on two of its key attributes; its stock of unique, heritage buildings and its proximity to the Greater Toronto Area. The City has been highly strategic in the way it has positioned itself as a hub for artists and the creative class where people (particularly Torontonians) can afford to buy their own home or start their own business, all while enjoying a high quality of life.

Overall what makes these varying approaches successful is that they have each been developed in response to local conditions. Whether it is creating new partnerships or establishing new economic development opportunities to generate increased interest and investment in the downtown core from the community and the private sector.



Downtown Hamilton, ON



Saskatoon Exhibition, Saskatoon, SK

TRACKING AND MONITORING DOWNTOWN ACHIEVEMENTS IS INVALUABLE TO PLAN IMPLEMENTATION

Measuring downtown performance can help city builders to understand the value of their downtown programs and investments, build ongoing support and momentum for these programs, as well as demonstrate the health of the downtown and the role it is playing relative to the wider city.

With a couple of exceptions, the performance of downtowns has not been closely tracked.

London stands out as a positive exception, as the City has been tracking the performance of its downtown for close to a decade through the semi-annual 'State of the Downtown Report.' This monitoring has empowered city builders to make informed decisions and see the value of the various investments they have made.


The Saskatoon report 'Public Spaces, Activity and Urban Form' is a major inventory on the quality and utilization of the City's public realm. Although this is a new study, it will likely become a critical building block for downtown revitalization in Saskatoon.



THE VALUE OF GOOD-QUALITY INFORMATION AND DATA CANNOT BE OVERSTATED.

PROSPERITY





**DOES THE DOWNTOWN HAVE
A ROBUST AND INNOVATIVE
ECONOMY?**

RESIDENTIAL DEVELOPMENT IS BRINGING VITALITY BACK TO DOWNTOWNS

Almost all of the downtown case studies were experiencing positive levels of residential growth.

In absolute terms, downtown Toronto and Vancouver were leading the charge with dramatic condominium booms in recent years. In percentage terms, Victoria, Vancouver and Edmonton had the highest levels of residential growth. London, Ottawa, and Halifax were also attracting unprecedented levels of growth. North Vancouver and Kingston were also seeing strong growth, particularly along their respective waterfronts.

Other downtowns seemed to be on the brink of a significant surge of residential development.

Regina and Saskatoon both seem to be in this position, against the backdrop of provincial growth and investment in up-and-coming downtown neighbourhoods. Likewise, Hamilton has several major condominium developments underway in its downtown neighborhoods. Downtown Windsor has seen some decline in its dwellings; in fact, the City as a whole has been challenged to grow its population on the heels of the financial crisis. However, the new post secondary institutions are expected to spur on new residential growth downtown to accommodate faculty and students.

RESIDENTIAL DEVELOPMENT HAS NOT BEEN AS RAPID IN THE DOWNTOWNS OF SMALLER AND MEDIUM-SIZED CITIES

With a few exceptions, the downtowns in smaller and medium sized cities have not seen the same level of residential growth as the downtowns in the larger cities. There are many explanations for this outcome :

Populations in these larger downtowns are well established, have a greater acceptance of apartment and/or car-free style living and have more incentive to live downtown to avoid long commutes.

Housing prices also play a role. Toronto has high housing prices where a young person may be able to purchase condominium downtown but not a single family dwelling in one of the residential areas surrounding the downtown core.

In contrast, St. Catharines, Charlottetown, Fredericton and Hamilton have not seen the same level of condominium development in their downtowns, but they have all reported a significant surge of young people moving into the historic, residential neighbourhoods surrounding their respective downtowns where housing is relatively affordable.

Municipalities that are in this position may benefit from tracking residential investment beyond their downtown cores to include the surrounding residential neighbourhoods to gain a more complete understanding of this trend of people moving back to the core.



DOWNTOWNS ARE INCREASINGLY ATTRACTING EDUCATIONAL INSTITUTIONS

Downtown Toronto stands out in this regard, as the university sector is emerging as one of the most transformational city builders in the core. The University of Toronto, Ryerson University, George Brown College and OCAD University have each been responsible for iconic and inspiring additions to the downtown.

London, Edmonton, and Winnipeg have also had great success attracting universities to re-purposed and heritage buildings. In downtown Vancouver, the redevelopment of the Woodward's Building adds a Simon Fraser University campus to existing satellite campuses in the core.

Windsor is also positioning itself as a critical post secondary hub in Ontario. St. Clair College and the University of Windsor, in partnership with all levels of government, have brought four new satellite campuses into the heart of the downtown. This development is a crucial step for Windsor's downtown revitalization, as the influx of students may help to re-animate the streets.

Downtown St. Catharines will also see McMaster University and Brock University satellite campuses in its core. Hamilton is another city making important strides in encouraging educational development in its downtown. As a result of financial and political support from the City, McMaster University was able to build its new Downtown Health Campus on the site of a former School Board building. This new campus increased McMaster's ability to teach medical students, but also will provide increased access to healthcare for residents of the downtown, making the area more liveable.

These trends are highly promising as downtown post secondary institutions provide a double value :

Firstly, post secondary institutions located downtown bring a student population to the core that is able to support local business, and add a critical mass of pedestrian activity throughout the day and evening. Secondly, students attending the university may form bonds to the downtown and decide to stay on after they have completed their studies, adding to a highly skilled labour market.³

³ International evidence of this comes from Paris, where the national government provides subsidies to the regional government to allow that government to invest in student housing. This invariably cultivates vibrancy in the downtown and ensures downtown residency is feasible for all income levels. Farro, S. (1997). Les aids au logement. Retrieved from <http://sos-net.eu.org/etrangers/fiche5.htm>. February 13.

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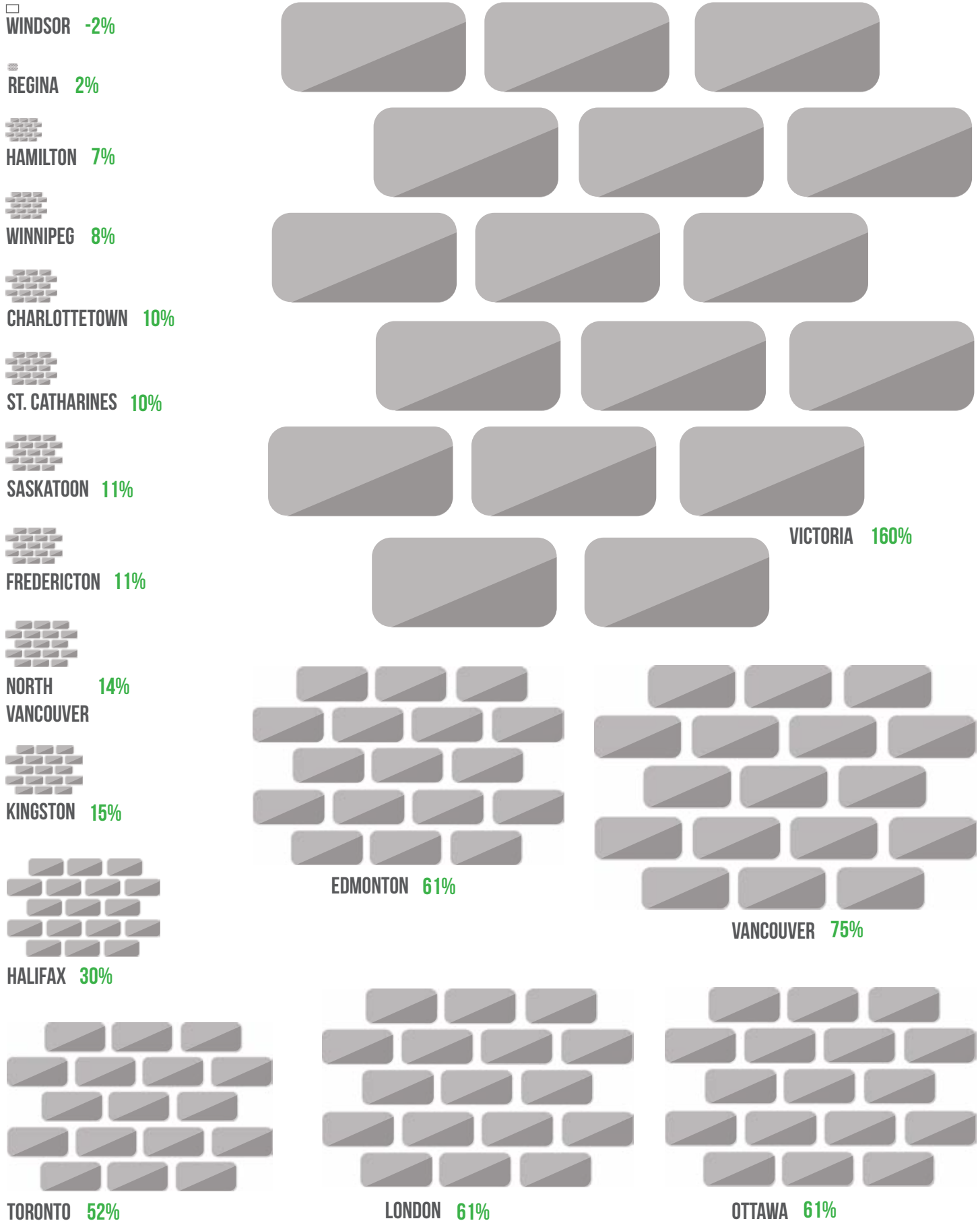
**WHAT WE ARE BEGINNING TO SEE IS
NEW DOWNTOWN DEVELOPMENT, NEW
CONDOMINIUMS GOING UP...NOW, NEW
RESIDENTS ARE SUPPORTING THE DOWNTOWN
JUST AS MUCH AS TOURISTS ARE.** ”

Interviewee, City of Victoria

”



DWELLING GROWTH IN DOWNTOWNS, 2001-2011 (%)



NUMBER OF LARGE-FORMAT GROCERY STORES WITHIN THE DOWNTOWN BOUNDARY (AS COUNTED FROM GOOGLE MAPS)



LEGEND

 = one large-format grocery store

*There were no large-format grocery stores counted in the downtowns of Regina, Victoria, Saskatoon, Fredericton, Charlottetown, and St. Catharines.

ACHIEVING A VIBRANT RETAILING SECTOR IS A MAJOR CHALLENGE FOR DOWNTOWNS

The retailing sector in every downtown was negatively impacted by the creation of suburban malls in the post-war era, and then once more by the emergence of ‘big box’ stores in more recent decades.

While many downtowns have started to recover and no longer face the reported ‘extreme vacancy challenges’ of the 1970s and 1980s, the impression that has emerged from dozens of interviews is that downtown retailing is still challenged by competition from suburban retailing.

There is some promise, however. In the same way that retailers followed residents out to suburban areas in the post war era, retailers are now following people back into the core.

For example in the larger downtowns with established populations like Toronto, there has been renewed interest from national retailers such as Canadian Tire, Loblaws, Best Buy, Bed Bath and Beyond stores and others. This is resulting in new large format stores downtown, with a more compact layout and less parking, to reflect a more ‘urban’ lifestyle.

For downtowns in the smaller and medium sized cities, there are promising trends for those that are finding their own niche, positioning themselves as boutique retailing destinations that also offer a range of restaurants, specialty food stores and services.

North Vancouver’s Lower Lonsdale neighbourhood is emerging as a dining destination. Downtown Charlottetown has invested considerably in the Victoria Row shopping district. Downtown Windsor has also invested significantly in its public realm; and downtown Kingston is seeing some dramatic enhancements to its streetscape and street furniture.

These streetscape improvements are allowing the smaller and medium sized downtowns to offer a unique retailing experience through the creation of vibrant pedestrian-friendly destinations.

PROMISING TRENDS FOR DOWNTOWN RETAIL ARE NOW EMERGING.



Edmonton food trucks, Edmonton, AB

DOWNTOWNS ARE RETAINING THEIR OFFICE INVENTORY

Downtowns have generally been able to maintain their concentration of office space and hold their position as 'the heart of commerce' in their respective cities.

Most have managed to retain over half of their city's office space inventory. Some are showing decline in the proportion of downtown office space over time. Therefore, if downtowns are to maintain their dominance, it will be important that they are able to attract office growth.

Regina has developed an innovative policy to concentrate office space within its downtown core and inner city neighbourhoods. Regina's policy has been designed to maintain the core's high proportion of office space (currently the downtown and surrounding neighbourhoods create a combined 84% of the City's office space) by disallowing major offices buildings (over 4,000 sq. m) to locate outside the Downtown Central City Office Area, except in limited situations. This policy stipulates an 80/20 split between office space downtown and citywide, and will contribute to Regina's compact downtown and impressive skyline.

London has similar policies in its Official Plan, directing large scale office space downtown, and has 80% of its office space concentrated in its core. There have also been some bold steps taken to grow the number of office buildings downtown.

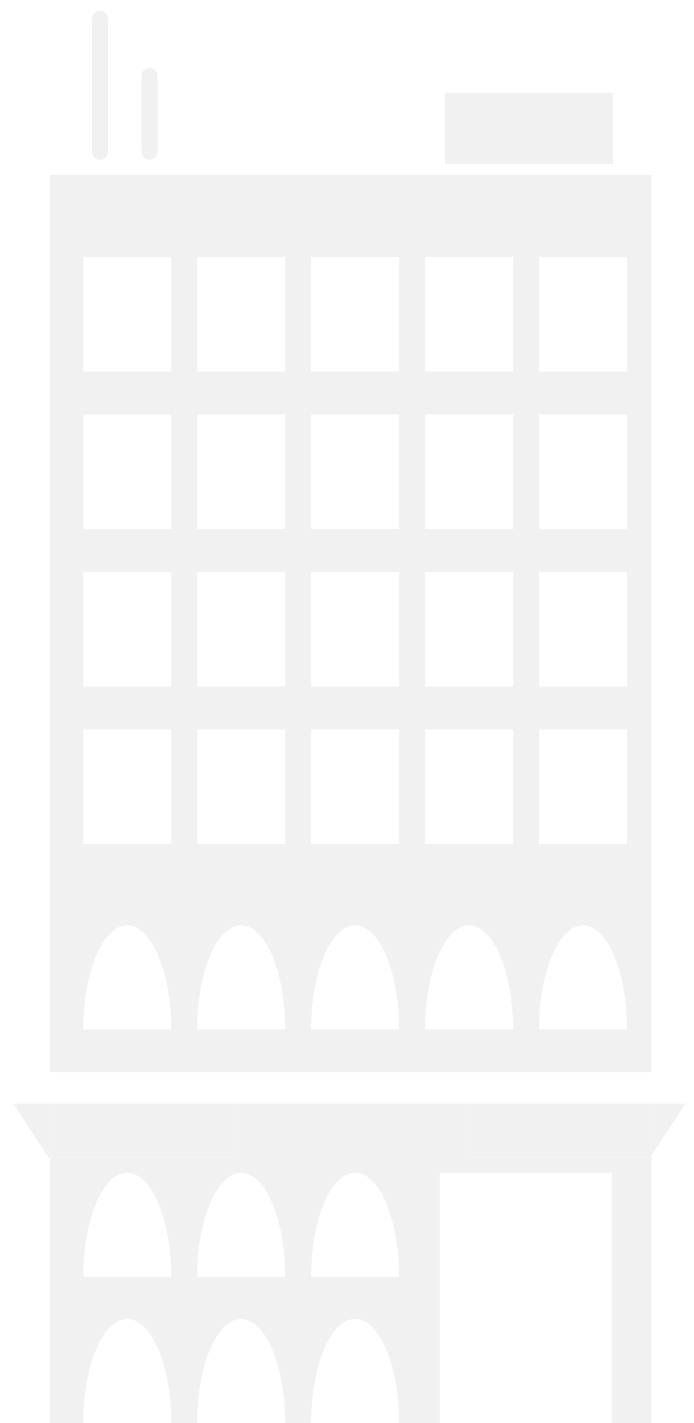
Windsor was involved in supporting development of one of the city's largest, newest and most prestigious office developments in the downtown. The City assembled properties to realize this building; leasing part of the space to see it built and spent \$16M on building the attached parking garage, which it continues to own. This type of leadership signals the City's commitment to diversifying the downtown economic base. Windsor also led the development of a new City Hall Campus to consolidate all city staff downtown, as well as accommodate Service Canada and Service Ontario.

Downtown Vancouver also has an interesting story regarding its office space. The downtown saw a significant increase in residential units that were undermining opportunities for commercial development. In response, the city introduced policies to preserve lands for employment uses and commercial development and is now seeing several major office buildings under development.

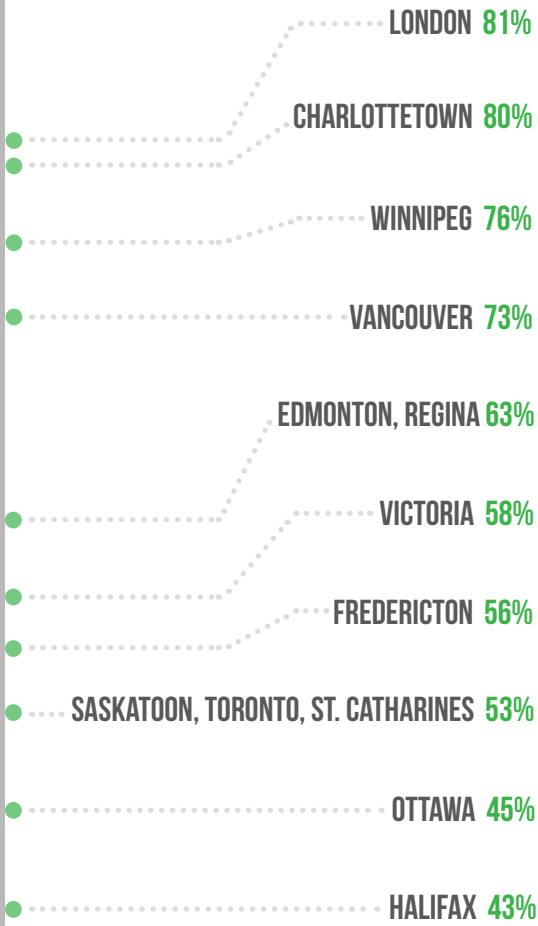
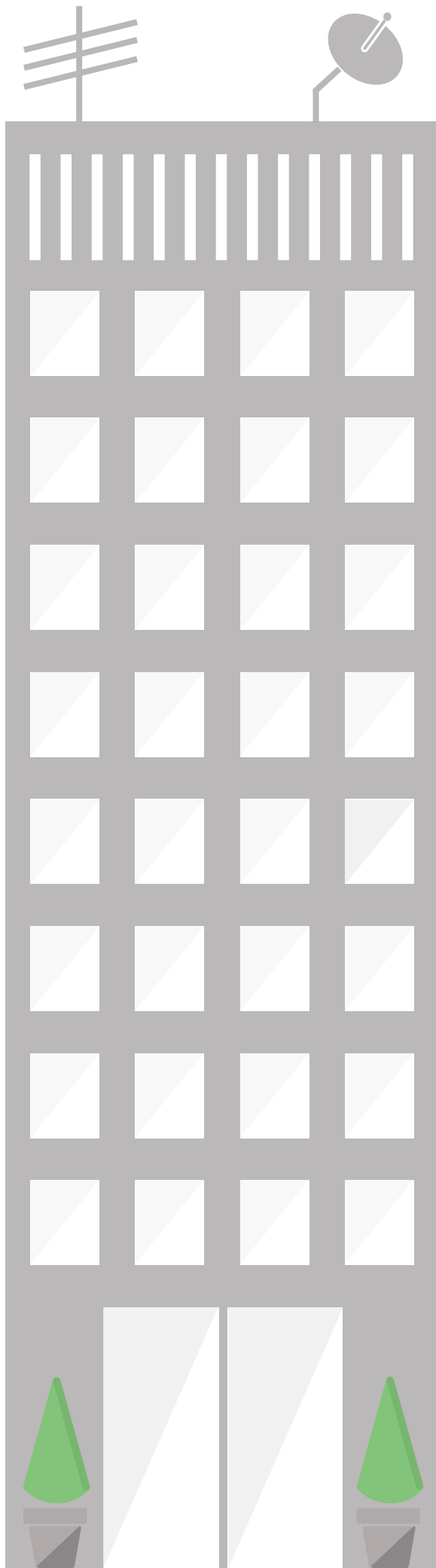
It will be critical for downtowns to help promote the market conditions to attract office space to the core.

This is important not only for downtown vitality but also to maximize transportation and infrastructure investments.

The importance of office buildings to house place-based employment is increasingly recognized as an issue that needs to be acknowledged in public policy.



100%



*Data unavailable for Kingston, Windsor, Hamilton, and North Vancouver

DOWNTOWN OFFICE SPACE AS A PERCENT OF CITY-WIDE INVENTORY



Financial District, Toronto, ON

DOWNTOWNS HAVE A HIGH CONCENTRATION OF JOBS

It is not surprising that Toronto, the largest of the downtowns studied, has the highest number of jobs. What is interesting to note however is that Downtown Ottawa has the second largest number of jobs and the second highest density of jobs at 318 per hectare.

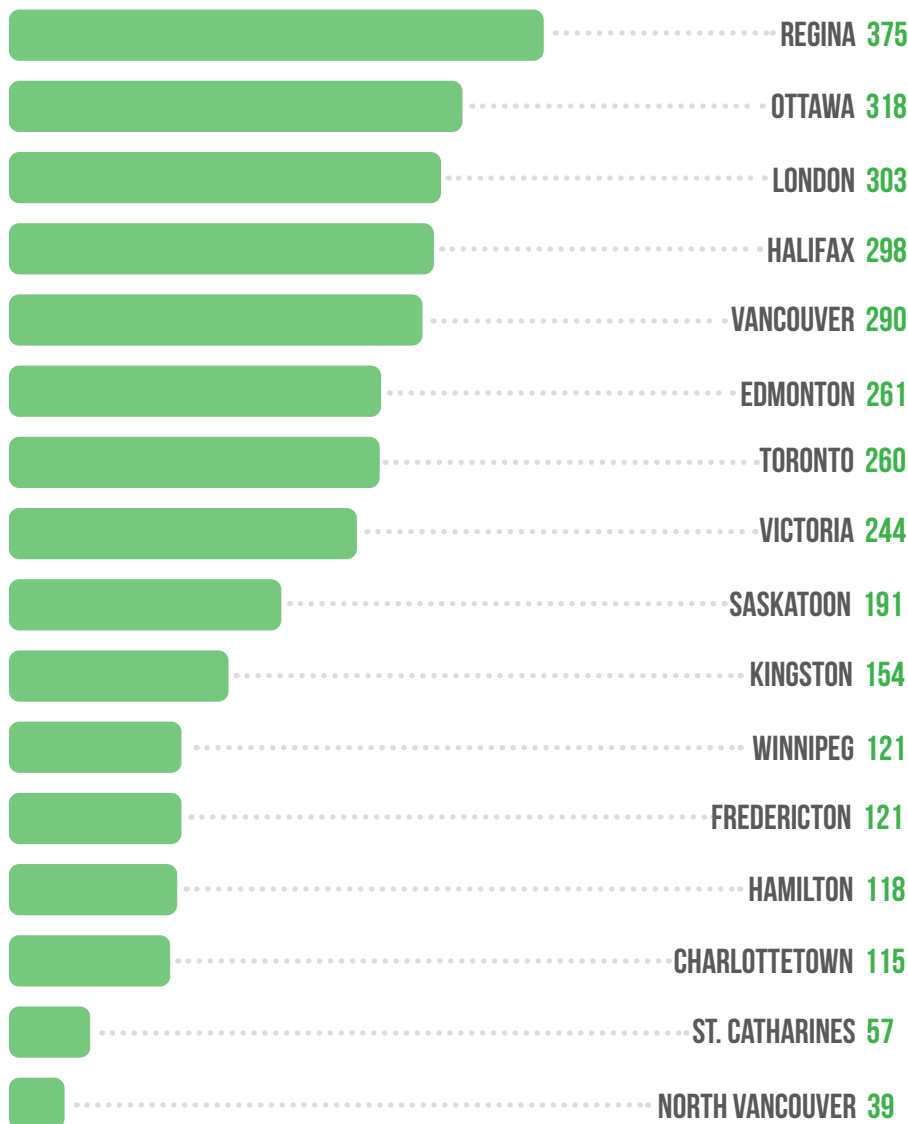
The provincial capital of Regina has the highest density of jobs at 375 per ha. The compact downtowns of London and Halifax have a similar number and density of jobs, with 303 and 298 jobs

per hectare, respectively. Saskatoon, Kingston, Winnipeg and Fredericton have a very high number of jobs, but relatively lower density, which could be due to the larger land area that comprises their downtown study area.

Edmonton, Victoria and Toronto each have a similar density of jobs in their downtown cores despite the dramatic differences between the physical layout and size of the three downtown study areas.

North Vancouver had a relatively low density of jobs, which will be important to consider as the City works to build new mixed use communities.

JOB DENSITY IN DOWNTOWNS



LEGEND


● number of jobs per hectare of downtown

*Data unavailable for Windsor



DOWNTOWNS PERCENTAGE OF TOTAL CITY PROPERTY TAX

LEGEND

Percent of property tax  = 1%

*North Vancouver has the highest percent of land area at 22%, compared to 10% on average. This difference accounts for North Vancouver's downtown having the highest percentage of city property tax.



DOWNTOWNS ARE MAKING A MAJOR CONTRIBUTION TO THE BOTTOM LINE OF MUNICIPALITIES

Downtowns often comprise as little as 1% of citywide land area, but attract ten or 20 times that in terms of contributing to the City's assessment base and generating property tax revenues. All of the downtowns featured in this report are making major contributions to their City's bottom line and economic prosperity.

The two cities that made the most significant contribution to their City's property tax base were downtown North Vancouver and Toronto. Downtown North Vancouver comprises 50% of the City's assessment base and generates nearly half of all property taxes collected by the City of North Vancouver.

In Toronto, the downtown also generates a quarter of the City's property tax revenues. In both cities, this contribution has been relatively stable in recent years.

A worrying trend in some downtowns is that they often comprise a declining portion of the City's assessment base. For example, Windsor's downtown assessment base fell from 4% to 2% of the city-wide assessment between 2008 and 2012.

A City that managed to reverse a similar experience was Edmonton. The downtown had a declining tax base in the 1980s and 1990s which meant that the city was losing a major source of revenue. Through targeted programs, it shifted its focus back to achieving a strong downtown core. Today downtown Edmonton is surging forward and is contributing 10% of the City's assessment base (almost double its contribution from 2004).

Also of some concern, was that the data revealed that the assessment base in downtown Hamilton grew slower than the rest of the city between 2002 and 2012. Similarly, data in Kingston shows that while the downtown's assessment base has increased by an impressive 38% between 2007 and 2012, there are a growing portion of properties paying taxes in lieu.

Overall, downtowns are generating a significant portion of citywide tax revenues. Into the future it is hoped that more complete data sets can provide even greater insights on the extent of this contribution.

DOWNTOWNS ARE ATTRACTING A HIGH PROPORTION OF NEW INVESTMENT

The economic importance of downtowns is reflected in the high levels of investment they have received over the past decade.

As a portion of citywide investment, downtowns have attracted on average one fifth of city-wide construction value between 2003 and 2011. The percentage of construction value that has been concentrated in Canadian downtowns tells a story of urban intensification, and is evidence of a growing preference to live and work in more urbanized, mixed use environments.

Toronto, North Vancouver and Vancouver have consistently attracted high levels of growth in their downtown. Saskatoon, Fredericton, Ottawa and Windsor have also seen some bursts of activity in downtown investment.

It is important to remember that each of the downtowns has continued to attract significant proportions of new investment, given that they occupy well under one percent of the city's total land area.

As cities reach their developable boundaries, these trends to intensify the downtown will continue to accelerate.

DOWNTOWNS HAVE ATTRACTED, ON AVERAGE, ONE FIFTH OF CITY-WIDE CONSTRUCTION VALUE BETWEEN 2003 AND 2011.

INVESTING IN AGING INFRASTRUCTURE IS NECESSARY TO ACCOMMODATE GROWTH

Given that infrastructure in many of Canada's downtowns is aging, ongoing investment will be needed to ensure that these districts can continue to absorb high levels of growth. These projects will be critical and likely offer an excellent return on investment, given the density of development that is currently underway or planned for these urban cores.

There are many examples of municipalities prioritizing these infrastructure upgrades. The City of Kingston, for example, developed a Downtown Action Plan in 2004 prioritizing upgrades and the replacement of underground infrastructure (some of these assets were over 200 years old). These improvements are currently underway and the City is also taking the opportunity to enhance their public realm.

The City of St.Catharines undertook similar upgrades of its underground infrastructure to ensure the downtown could absorb future growth.

Other municipalities are taking the lead by investing in energy infrastructure. The City of Hamilton's District Energy Plan from 2002 was designed to achieve a more energy efficient heating delivery system for a number of downtown buildings. Though the plan is still underway, it has already led to significant gains in promoting a sustainable and competitive downtown district. An innovative partnership with a local school board allowed the district plant to be centrally located, while giving the school board a deep discount on energy prices for their facilities.

Similarly, the City of North Vancouver has developed a district energy system in Lower Lonsdale that is delivering some of the most economically efficient energy in the region.



Major efforts to replace older infrastructure in downtown Kingston has facilitated new growth opportunities.

“

**WE INSTITUTED A SCREETScape
IMPROVEMENT PROGRAM ON QUEEN STREET...
THE INTERESTING THING TO ME WAS HOW THE
PRIVATE SECTOR INVESTMENT FOLLOWED.
YOU COULD SEE THE DIFFERENCE, WALKING
DOWN THE STREET.**

”

Interviewee, City of Charlottetown



CONSTRUCTION VALUES OF DOWNTOWNS AS A PERCENTAGE OF CITY-WIDE, 2003-2011

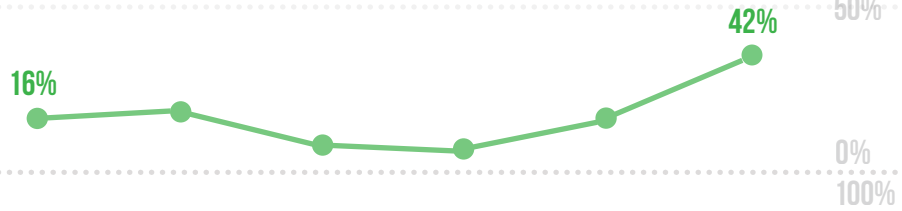
*Data points are omitted where data was unavailable
 *Some cities are omitted because data was unavailable

20% is the average of how much citywide construction value downtowns are attracting each year, based on the available information



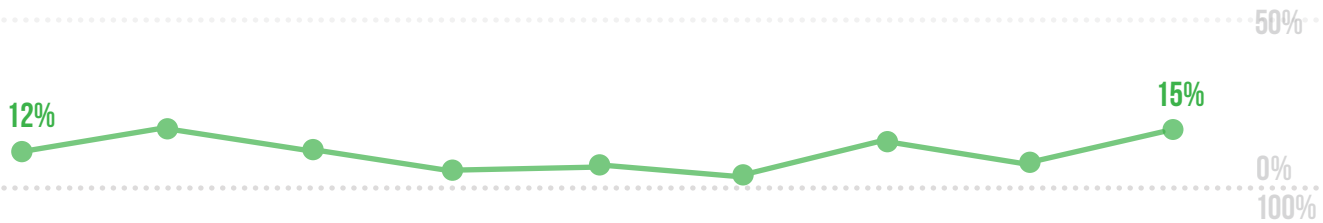
FREDERICTON

Peak : 42%



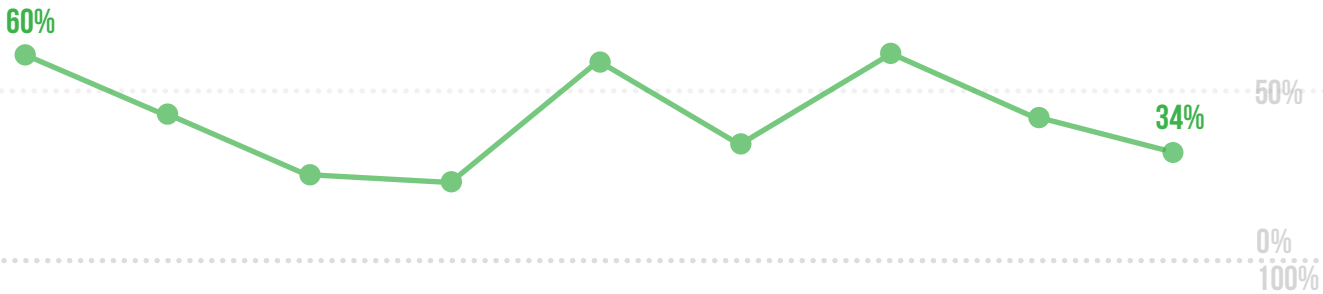
OTTAWA

Peak : 19%



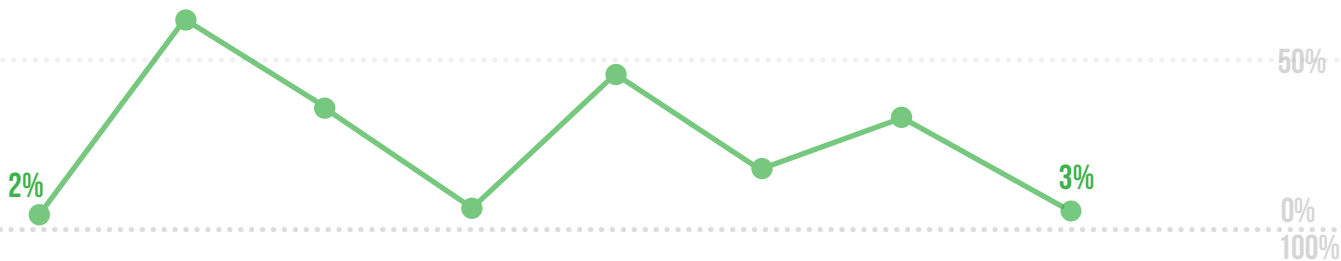
VANCOUVER

Peak : 60%



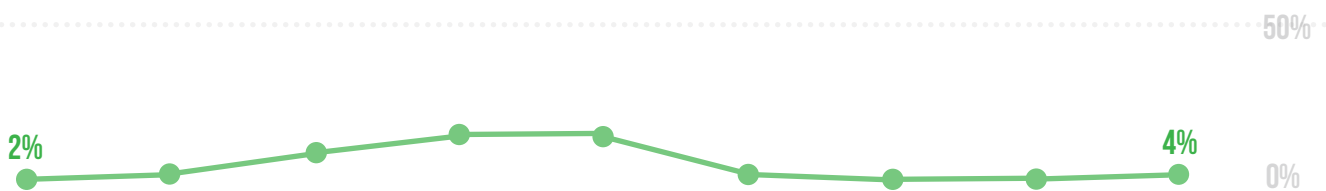
SASKATOON

Peak : 61%

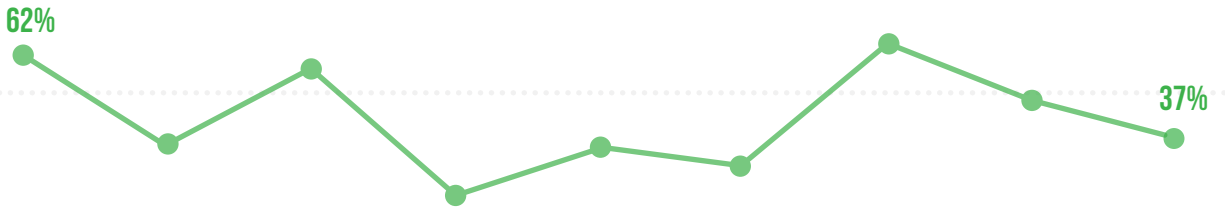


KINGSTON

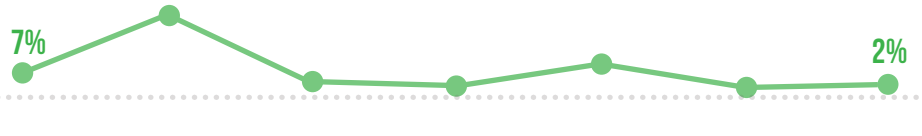
Peak : 17%



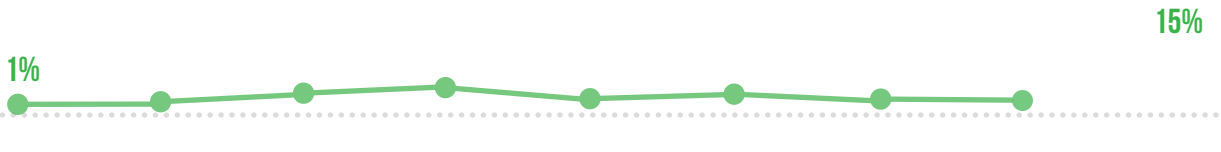
NORTH VANCOUVER
Peak : 62%



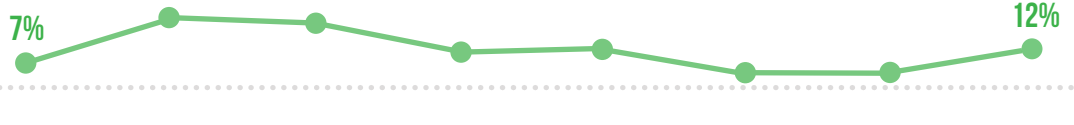
WINDSOR
Peak : 26%



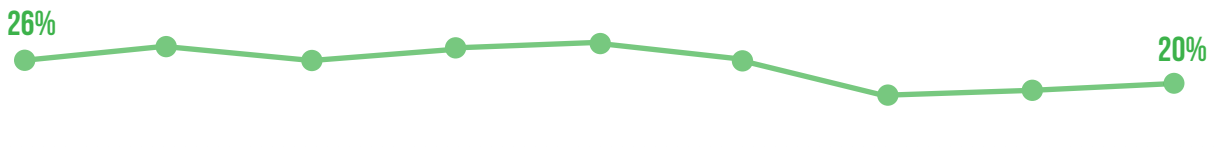
ST. CATHARINES
Peak : 8%



REGINA
Peak : 20%



TORONTO
Peak : 31%



HAMILTON
Peak : 16%



2003

2004

2005

2006

2007

2008

2009

2010

2011

LIVEABILITY



Cat Empire performing at the Winnipeg Music Festival, Winnipeg, MB

**IS THE DOWNTOWN VIBRANT,
LIVEABLE, AND CONNECTED?**



DOWNTOWNS ARE EXPERIENCING POSITIVE POPULATION GROWTH

It is considered that this positive growth reflects changing attitudes and lifestyles across Canada, with people increasingly seeking to live in more active neighbourhoods, close to high quality amenities and their workplaces so they can avoid a long commute times. This trend will likely continue into the future.

The downtown that has experienced the most rapid population growth in percentage terms is Victoria, with 141% growth between 2001 and 2011. This is followed by downtown Vancouver (95%) and Edmonton (77%) during the same period. Other cities such as London and Ottawa saw their downtown population grow by over one third (48% and 41% respectively). Toronto, Halifax, Regina and Saskatoon saw a population increase of approximately 20%. Kingston, Winnipeg and Charlottetown have experienced a modest increase in population.

Fredericton and Windsor have experienced some loss of population. It will be important to understand this trend; as discussed earlier it is possibly connected to the size of the cities, as there is a very short distance between these inner city neighbourhoods and the downtown cores, as well as availability of high quality housing in the inner city.

When reviewing these figures it is also worth considering the size of the downtown population; downtowns with smaller populations can see some significant proportional increases or decreases based on some relatively minor shifts in numbers.

Larger cities might see slower growth proportionally, while still intensifying at a fast pace. Cities such as North Vancouver may have a lower growth rate, but are still powerhouses when it comes to the size of their downtown population.

The densest downtown is Vancouver with 177 people per hectare. This was followed by Toronto with 131 persons per hectare and North Vancouver, with 90 persons per hectare. Regina and Fredericton have the lowest population densities at 18 and 12 persons per hectare.

London, Charlottetown, Windsor, and Kingston also have similar population densities at 51, 47, and 46 persons per hectare. Despite having one of the highest rates of population growth, the population density in downtown Victoria is one of the lowest with 22 persons per hectare.

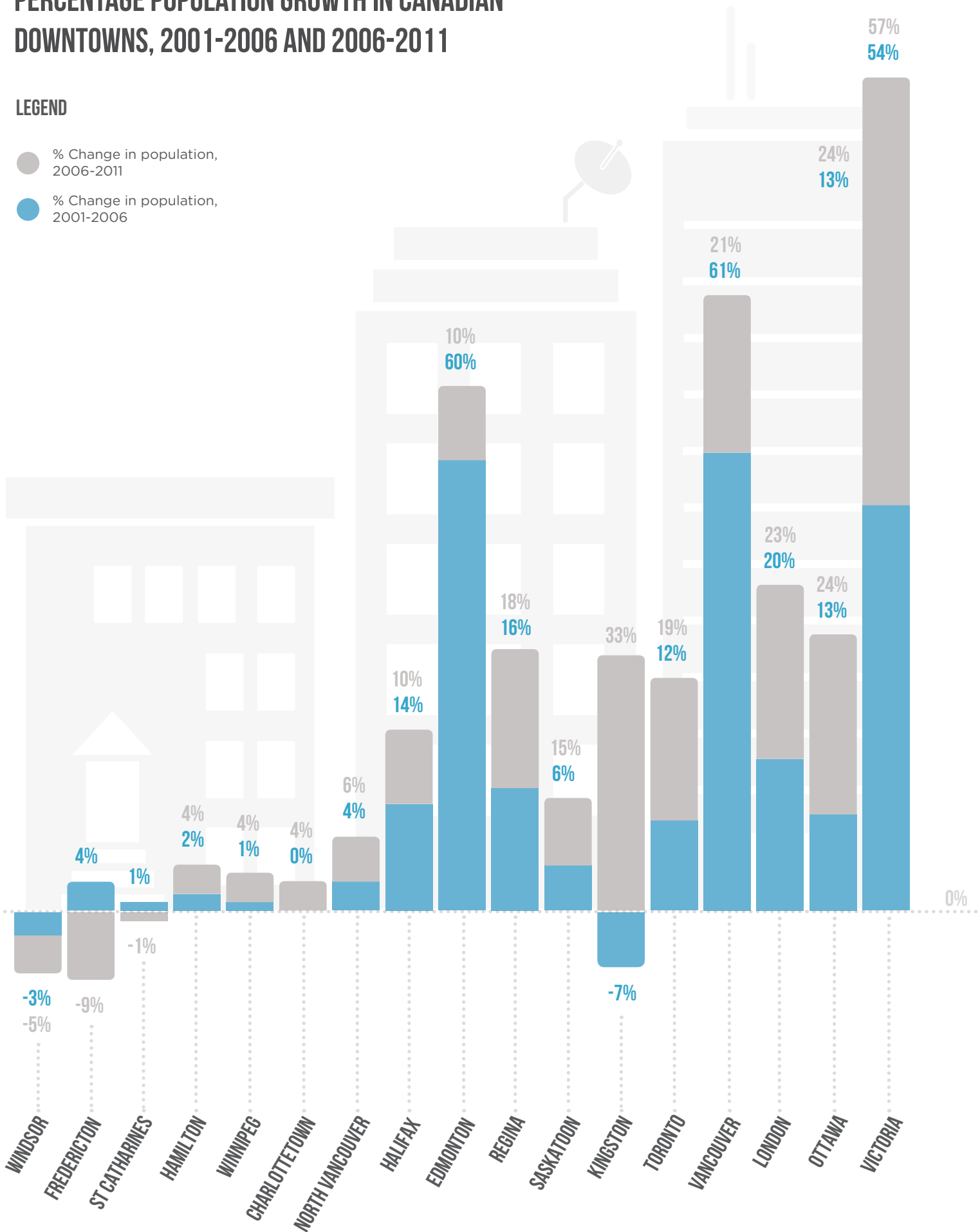
When reviewing these figures it is also worthwhile looking at the size of the study areas that were selected for each downtown. Some were significantly larger than others which can affect density calculations.

RATES OF GROWTH VARIED BETWEEN THE DOWNTOWNS, BUT OVERALL THERE WAS A STRONG INCREASE IN THE NUMBER OF DOWNTOWN RESIDENTS.

PERCENTAGE POPULATION GROWTH IN CANADIAN DOWNTOWNS, 2001-2006 AND 2006-2011

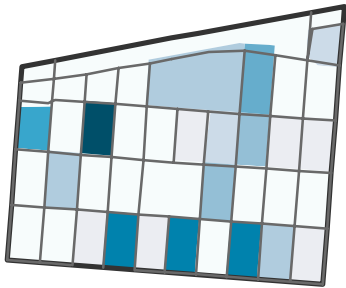
LEGEND

- % Change in population, 2006-2011
- % Change in population, 2001-2006

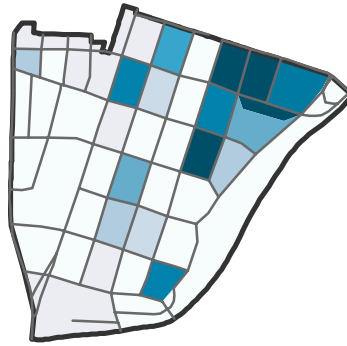


DOWNTOWN POPULATION DENSITY

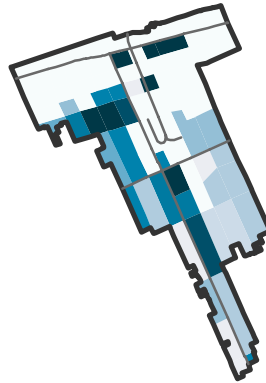
*Scale is shown beside each map



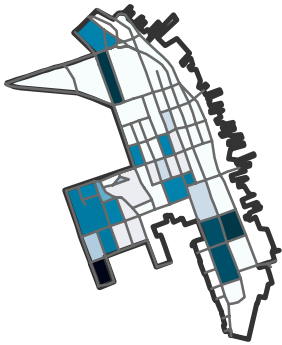
REGINA
1:25,000



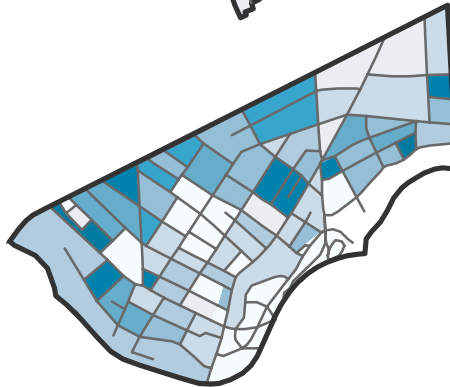
SASKATOON
1:30,000



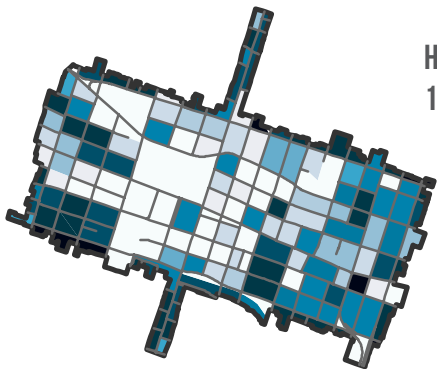
WINDSOR
1:40,000



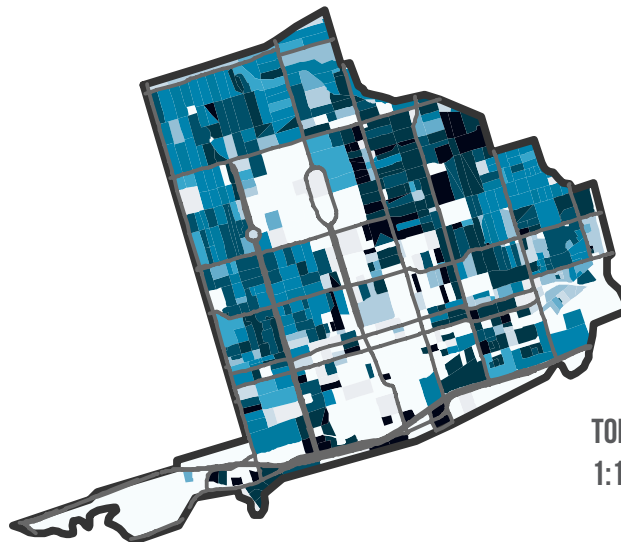
HALIFAX
1:40,000



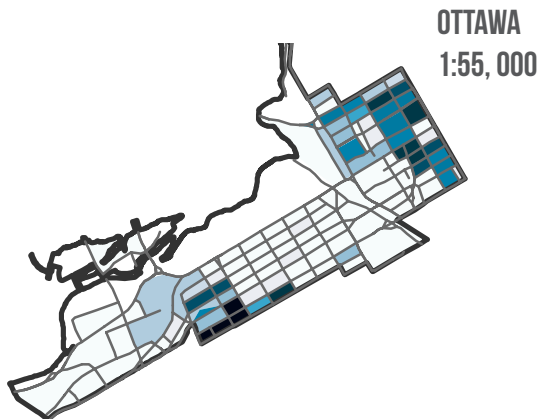
ST. CATHARINES
1:35,000



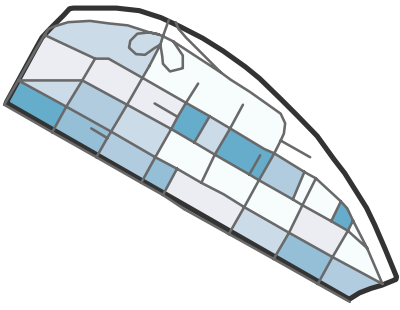
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1:55,000



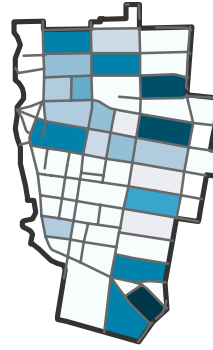
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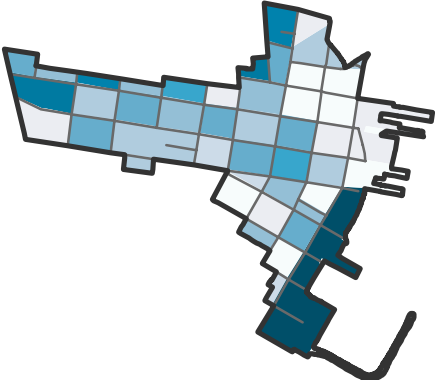
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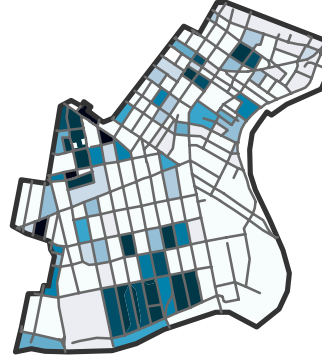
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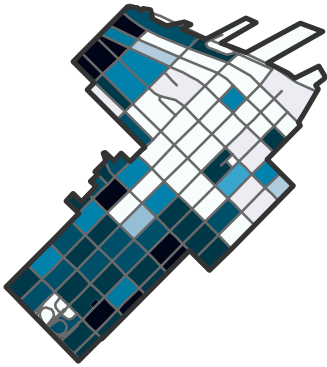
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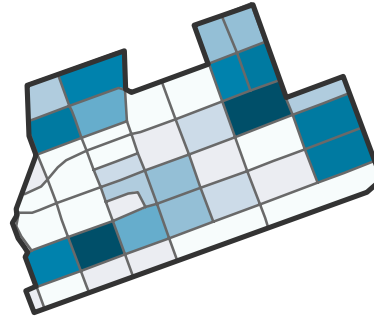
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1:25,000



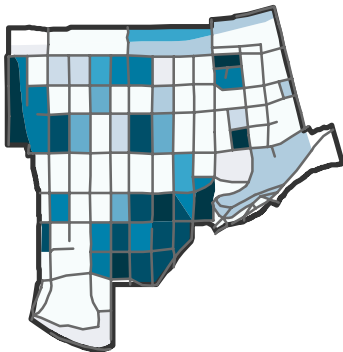
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1:55,000



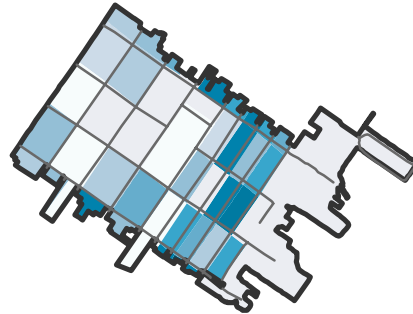
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1:40,000



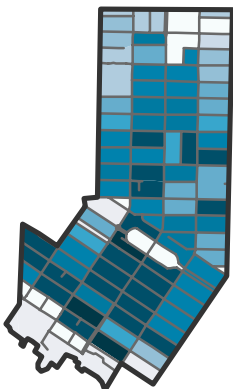
LONDON
1:30,000



EDMONTON
1:30,000

















CHARLOTTETOWN
1:25,000



NORTH VANCOUVER
1:80,000

LEGEND

Dissemination Blocks (people/Ha)

-  501 +
 -  201 - 500
 -  121 - 200
 -  101 - 120
 -  61 - 100
 -  51 - 60
 -  41 - 50
 -  31 - 40
 -  21 - 30
 -  11 - 20
 -  1 - 10
 -  0
-  Downtown Boundary
 -  Major Streets

DOWNTOWNS ARE MIXED-USE COMMUNITIES

While the downtown case studies are dominated by commercial development, they also accommodate substantial areas of institutional, retail, recreational and residential uses.

To illustrate this point, the following page provides an overview of land use data for most of the downtown case studies. It is acknowledged this data has some limitations. The key challenge stems from differences in the way that municipalities collect and categorize 'land use' information. There is also some complexity when it comes to mixed use development; residential buildings with retail at grade are classified in all manner of ways by their respective municipalities. To reconcile this issue, CUI showed the predominant use at the parcel level.

For example, a condominium building with retail at grade would be classified as 'residential' for the purposes of this study. Therefore it is important to interpret this data cautiously and with the knowledge that it is intended to provide a starting point for further investigation.

This data provides insight into the development opportunities that exist in each of the downtown case studies. The 'transportation' category generally provides an indication of the amount of surface parking in the downtown. When combining this with 'vacant' land there is an even more accurate picture of how much developable land is in the core.

For example in downtown Winnipeg, more than a quarter (27%) of the total land area is categorized as either 'vacant' or 'transportation,' representing significant development opportunities.

Downtown Victoria also has a large portion of 'transportation' land (19%), some of which are

the large parking lots along the harbourfront, which offer tremendous opportunity for future redevelopment.

The scarcity of land in downtown Vancouver and North Vancouver is represented with a mere 1% of land classified as 'vacant' respectively.

The downtowns of capital cities have the largest proportions of institutional functions. Just under a third (30%) of land in downtown Fredericton is occupied by institutional uses. In Ottawa a fifth of land area (20%) is classified as having an institutional function. Downtown Winnipeg and Edmonton have 16% and 12% of institutional uses respectively. Downtown Victoria and Regina are slight exceptions to this pattern, due to their Legislatures being just beyond the boundaries of the respective downtown study areas.

Additionally, the ceremonial role and functions carried out in Ottawa are reflected with the high proportion of open spaces, 32% of land downtown.

These data sets also help us see how successful downtowns have been at attracting residential growth.

Winnipeg, Ottawa, Saskatoon and Victoria have seen a recent residential influx, yet residential land uses still only occupies a small area of the core (under 10% of land area). Edmonton and London have similar proportion at 15% and 16% respectively. Downtown Fredericton, St.Catharines and Hamilton have high portions of residential land uses, yet this largely reflects the often lower density dwellings that circle these downtowns' historic financial cores. Downtown Vancouver and Downtown North Vancouver have a large area of their land dedicated to residential uses, 29%, and 68% respectively.

EACH DOWNTOWN TRULY HAS MIXED USES, AND PROVIDES AN IMPORTANT MODEL FOR DEVELOPMENT IN OTHER LOCATIONS.

DOWNTOWN LAND USES



LEGEND

- Commercial
- Industrial
- Institutional
- Residential
- Open Space
- Transportation
- Vacant

“

**WE NEED TO DEVELOP A CULTURE HERE
THAT IS OUR OWN...THE CHALLENGE
ISN'T GETTING PEOPLE TO COME HERE,
BUT GETTING PEOPLE TO THINK THAT
THIS IS A GREAT PLACE TO LIVE.**

”

Interviewee, City of St. Catharines



DOWNTOWNS ARE ACCOMMODATING BOTH YOUNGER AND OLDER RESIDENTS IN SMALLER HOUSEHOLD SIZES

Generally the downtowns had a substantial cohort of young people, compared to citywide information. They also had consistently smaller household sizes and their residents typically had higher levels of education.

In many cases, this is likely linked to the presence of post secondary institutions downtown. The downtowns are also accommodating a growing number of seniors; this trend was particularly clear in Windsor, Kingston, Charlottetown and St. Catharines.

Older populations have some specialized needs and it is important that downtown neighborhoods are accessible and able to meet these needs.

Overall, the demographic profile of our downtowns will be important to understand, as it could contribute to less diverse communities.

For example, in CityPlace in Toronto, a “doorman survey” conducted by a local councillor found only 128 children living in the nearly 5,000 units that are in the neighbourhood.⁴ As each of the downtowns continues to grow, it will be important that strategies are developed to achieve vibrant, diverse, and multi-generational communities.



AS EACH DOWNTOWN CONTINUES TO GROW, IT WILL BE IMPORTANT THAT STRATEGIES ARE DEVELOPED TO ACHIEVE VIBRANT, DIVERSE, AND MULTI-GENERATIONAL COMMUNITIES.

⁴ Keenan, E. (2011). Is City Place Toronto's Next Ghetto. Retrieved from <http://www.thegridto.com/life/real-estate/is-city-place-toronto%E2%80%99s-next-ghetto/>. Accessed 2012 January 16.

MODE OF TRANSPORTATION IN DOWNTOWNS VS. CITY



LEGEND

- By car (%)
- Other modes of transport (%) (bicycle, transit, walking etc.)



DOWNTOWNS ARE GREAT PLACES TO ENCOURAGE WALKABILITY, CYCLING, AND TRANSIT USE

The downtown case studies tend to be the city's most easily accessible neighbourhoods. The downtowns are generally at the centre of their city's transit network and are invariably well served by the road network. Downtowns also tend to be the focus, or at least a key node, in the delivery of new transit projects. Downtown residents have far higher rates of walking, cycling and utilizing transit, which is important for moving people more seamlessly around the city.

More specifically, downtown residents are more likely to use alternative modes of transportation as part of their daily commute. In St. Catharines, nearly 90% of city-wide residents commuted to work by car, while only 60% of downtown residents commuted to work by car. Likewise, in Kingston 79% of citywide residents commuted to work by car, compared to only 30% of downtown residents commuting by car. Both cities have made substantial investments in walking and cycling infrastructure downtown. North Vancouver and Hamilton are notable for their high proportion of car use by downtown residents in getting to work (both over 60%), which could partly reflect a lack of local jobs, as well as the proximity of these municipalities to large urban regions with dispersed employment offerings.



STRATEGY



Provencher Bridge, Winnipeg, MB

**IS THE CITY INVESTING
STRATEGICALLY IN ITS FUTURE?**



BIG INVESTMENTS GROW CONFIDENCE IN THE DOWNTOWN, BUT THE VALUE OF THESE INVESTMENTS CAN BE MAXIMIZED WITH SMALL-SCALE FINANCING INCENTIVES

Downtown revitalization efforts are maximized when they are happening on multiple levels.

The impression emerging from dozens of interviews is that big investments are important to grow confidence and increase the profile of the downtown core, yet small scale financial incentives can lead to many improvements that add up.

A mix of these actions can therefore demonstrate a City Council's ongoing commitment to enhancing the core and help spur more favourable market conditions to attract private investment.

The City of London has had significant success investing in both large scale cultural and entertainment facilities designed to bring new users to the core, coupled with smaller scale financing programs and waiving of residential development charges in priority areas of the downtown. As a result the core has increased its levels of vitality with more visitors and residents, as well as seen significant public realm improvements from property owners making use of incentive programs to enhance their buildings.

The City of Edmonton has adopted a similar approach, yet they have taken the lead on many public realm improvements in emerging neighbourhoods to increase the attractiveness of these areas for new residential developments. Reportedly, this formula has seen significant success and has been used to stimulate growth in various new neighbourhoods across the core.

The City of Hamilton has also put in place an aggressive public investment program. These investments were largely made following the financial crisis and were important in stimulating local economic growth and supporting local construction firms. Again these investments have been coupled with a Community Improvement Plan that has been strategic in the way it attracts private developers into the downtown with financial incentives. The City of Hamilton has also maintained a strong focus on marketing and positioning itself as a creative city where one can enjoy a high quality of life.

The Regina Revitalization Initiative is another highly innovative and ambitious project, which seeks to redevelop the downtown rail yards. This major redevelopment project will involve the creation of a new stadium, new housing and an entertainment district. This plan has benefitted from continued support through political cycles, which will be critical given the scale of this major revitalization project. To move this plan forward, it is critical to ensure efforts can continue to be made at multiple levels and that the public and private sectors can be equal partners.

A downtown that has generally made large scale investments is Winnipeg. These investments have increased confidence in the core, signaled by the return of the Winnipeg Jets and high levels of commercial growth.⁵ Yet one interviewee commented that while downtown Winnipeg received lots of large scale investments, these alone have not attracted the residential development that city builders hoped to see. In response new residential incentives have been introduced to the core and this is reportedly spurring residential development in downtown Winnipeg.

Downtown Ottawa, on the other hand, has been focused on small scale investments in the downtown, primarily through the waiving of development charges that has helped the City see \$235M in residential growth between 2002 and 2011. Downtown Ottawa also benefited from significant investments in the public realm at the direction of the National Capital Commission.

Downtown Toronto, Vancouver and North Vancouver have not had to go to the same lengths to attract new growth to their downtowns. This could be due to a range of factors, such as their size, economic conditions, land constraints, established residential populations, or local life style preferences.

In fact the City of Vancouver has had to place limits on residential growth in the core. A recent report on the competitiveness of Toronto's office market by the CUI was also critical of a trend that has seen a steady reduction in the number of sites for office developments in the downtown.⁶

Additionally, all three cities are leveraging private funds from new developments rather than providing financial incentives to attract growth. Each has

benefited from private investment in community facilities, public realm upgrades, parks, public art. For example, as part of the Time development on West First Street, the City of North Vancouver leveraged \$40M for the development of a community centre.

Overall there is no one 'right way' for a City to invest, yet it seems that many of the downtowns which are receiving both large and small scale public investments are seeing some of the most significant transformations.

Moreover the impression emerging from dozens of interviews with private developers is that they are motivated to invest in the downtown if they see a City Council consistently prioritizing the core, showing high levels of both vision and commitment to a variety of investments over a sustained period of time.

Therefore having a comprehensive range of investments allows for a municipality to lead by example and demonstrate its ongoing support for the downtown.



The Shaw Conference Centre was a major investment for the city of Edmonton, AB.

**DOWNTOWN REVITALIZATION EFFORTS
ARE MAXIMIZED WHEN THEY ARE
HAPPENING ON MULTIPLE LEVELS.**

5 Downtown Winnipeg Biz. (2011). BIZ Trends 2010-2012. Retrieved from: http://www.downtownwinnipegbiz.com/resource/file/DBIZ_Trends_2010.pdf. Accessed 2011 November 29.

6 Canadian Urban Institute. (2011). The New Geography of Office Locations, As Consequences of Business as Usual in the GTA. Retrieved from: http://www.canurb.com/sites/default/files/reports/2010/TOC_CUI_Report_April2011.pdf. Accessed 2011 October 15.

DOWNTOWNS ARE SUPPORTING A WIDE RANGE OF NEW CAPITAL PROJECTS, YET THERE ARE MANY CHALLENGES TO GAINING A FULL PICTURE ON PERFORMANCE

When a city makes a major investment it would be ideal if they could have a clear understanding of the impact it has on their downtown.

It would be even better if a city could gain an understanding of the benefits of one investment over another or the way that various investments are able to support each other.

This study provides a baseline to begin considering the impact of these investments and it is hoped that this baseline can be built upon into the future.

It is acknowledged that the data underpinning the capital projects information presented in this study has some limitations. For example, the data varies in terms of the years collected, as capital projects are funded over many years and this makes it difficult to separate out the period being studied.

Municipalities can also be challenged to spatially query their capital projects data, which can mean that not all investments are captured.

On a positive note however there are many similarities between the data collection process and data collected for downtown Kingston, Hamilton, St.Catharines, Windsor, Regina and North Vancouver, Halifax, Vancouver, Fredericton, Edmonton, Saskatoon, Charlottetown and London and thus we have an opportunity to cautiously compare this information.

TO COMPARE THE TYPES OF INVESTMENTS THAT HAVE BEEN MADE, THE PROJECT TEAM HAS CATEGORIZED THE CAPITAL PROJECTS AS FOLLOWS:

CIVIC SPACES AND STREETSCAPES

Streetscape projects, city squares, urban design studies for streetscape improvements, street tree programs, new furniture and large scale programs.

COMMUNITY FACILITIES AND SERVICES

Improvements to City Hall, social housing, community child care, police stations, fire stations and public pools.

ARTS AND ENTERTAINMENT

Entertainment venues and arenas, public art programs, statues and galleries.

PARKS AND OPEN SPACE

Upgrades to parks and facilities i.e. upgrade to parks spaces and park buildings etc

EDUCATIONAL

Universities, high schools, elementary schools, research facilities, libraries and museums.

COMMERCIAL AND CONFERENCE FACILITIES

Conference centres, car parking facilities, investments in hotels or office buildings.

DEVELOPMENT INCENTIVES

Investments to leverage private investment or large scale redevelopments.

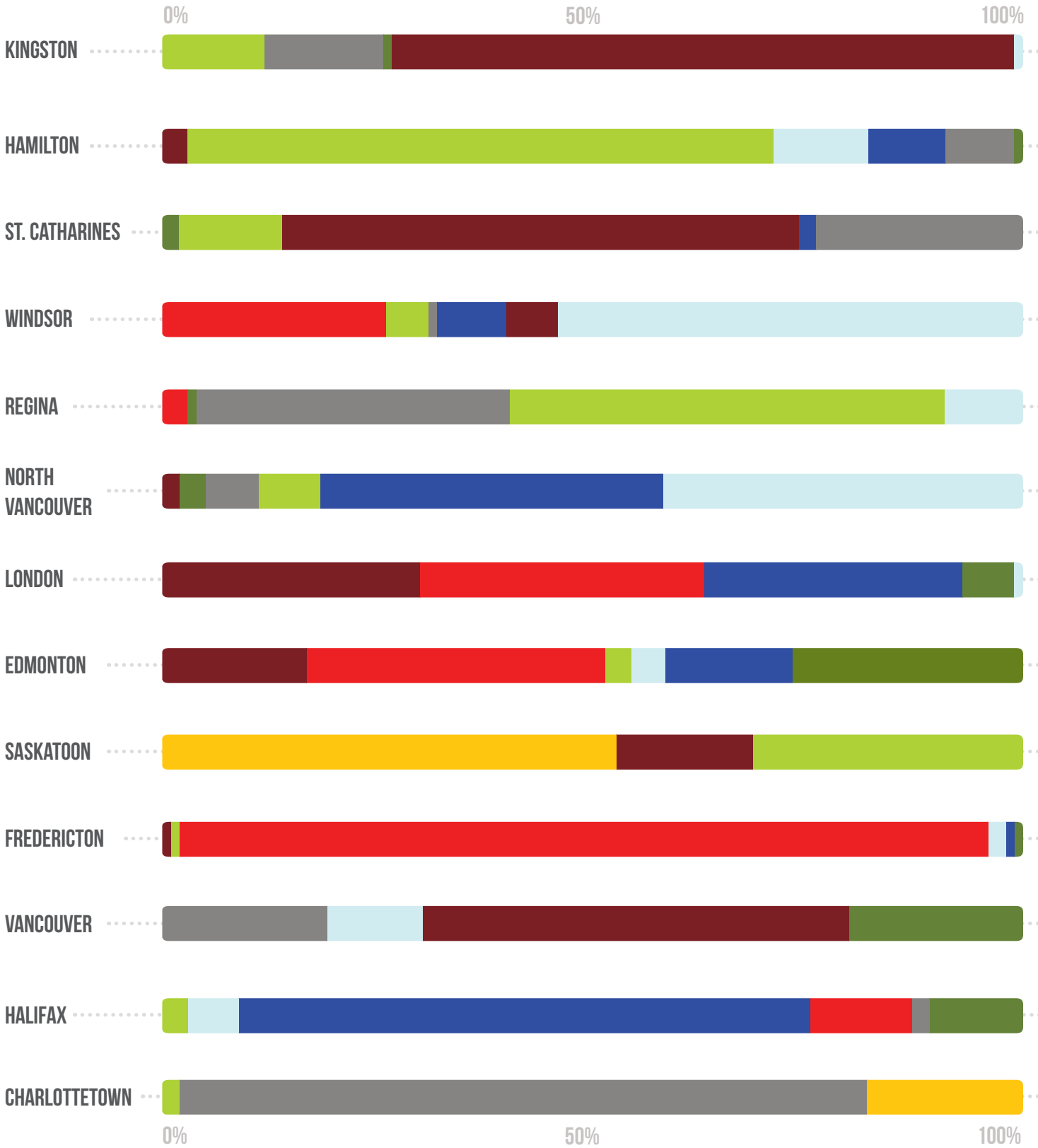
INFRASTRUCTURE, UTILITIES AND TRANSPORTATION

Investments in water, energy and/or transportation infrastructure.



Byward Market, Ottawa, ON

TYPES OF MUNICIPAL CAPITAL INVESTMENTS IN DOWNTOWN, SHOWN AS A PERCENT OF TOTAL



LEGEND

- Parks & Open Space
- Civic Spaces & Streetscapes
- Arts & Entertainment
- Educational
- Community Facilities & Services
- Commercial & Conference Facilities
- Development Incentives
- Infrastructure, Utilities & Transportation

**TOTAL MUNICIPAL
CAPITAL INVESTMENT :**

**LARGEST INVESTMENTS
MADE :**

\$85,668,293	\$45M : K-Rock Sport and Entertainment Centre \$18M : Total Grand Theatre renovations
\$203,231,000	\$75M : City Hall improvements \$10M : Central Library improvements
\$30,602,540	\$18M : Niagara Centre for the Arts \$11M : Carlisle St. Parking Garage
\$138,900,000	\$62.6M : Downtown Family Aquatic Complex \$45.6M : 1 Riverside Dr. Office Building redevelopment
\$15,037,000	\$7M : City Square WOW Project \$4.5M : Lorne Street reconstruction
\$87,887,058	\$33.6M : Library and Block 62 \$16M : City Hall
\$174,100,000	\$52.8M : John Labatt Centre (multipurpose venue) \$40.5M : London Convention Centre
\$149,552,000	\$47.3M : Shaw Conference Centre \$36.7M : Louise Mickinney Riverfront Park
\$109,831,568	\$50M : River Landing (mixed-use community) \$21.5M : 25 Street Redevelopment (mixed use neighbourhood)
\$84,097,550	\$34M : Provincial Office building \$32M : East-End Project (new convention centre)
\$148,860,000	\$60.7M : Queen Elizabeth Theatre \$27M : Emery Barnes Park, Phases 1-3
\$34,017,000	\$20.3M : downtown Central Library \$3M : City Hall stone restoration \$56M : downtown Convention Centre
\$21,477,150	\$9M : Investments in downtown parking parkades \$7M : Downtown Wastewater Treatment Plant

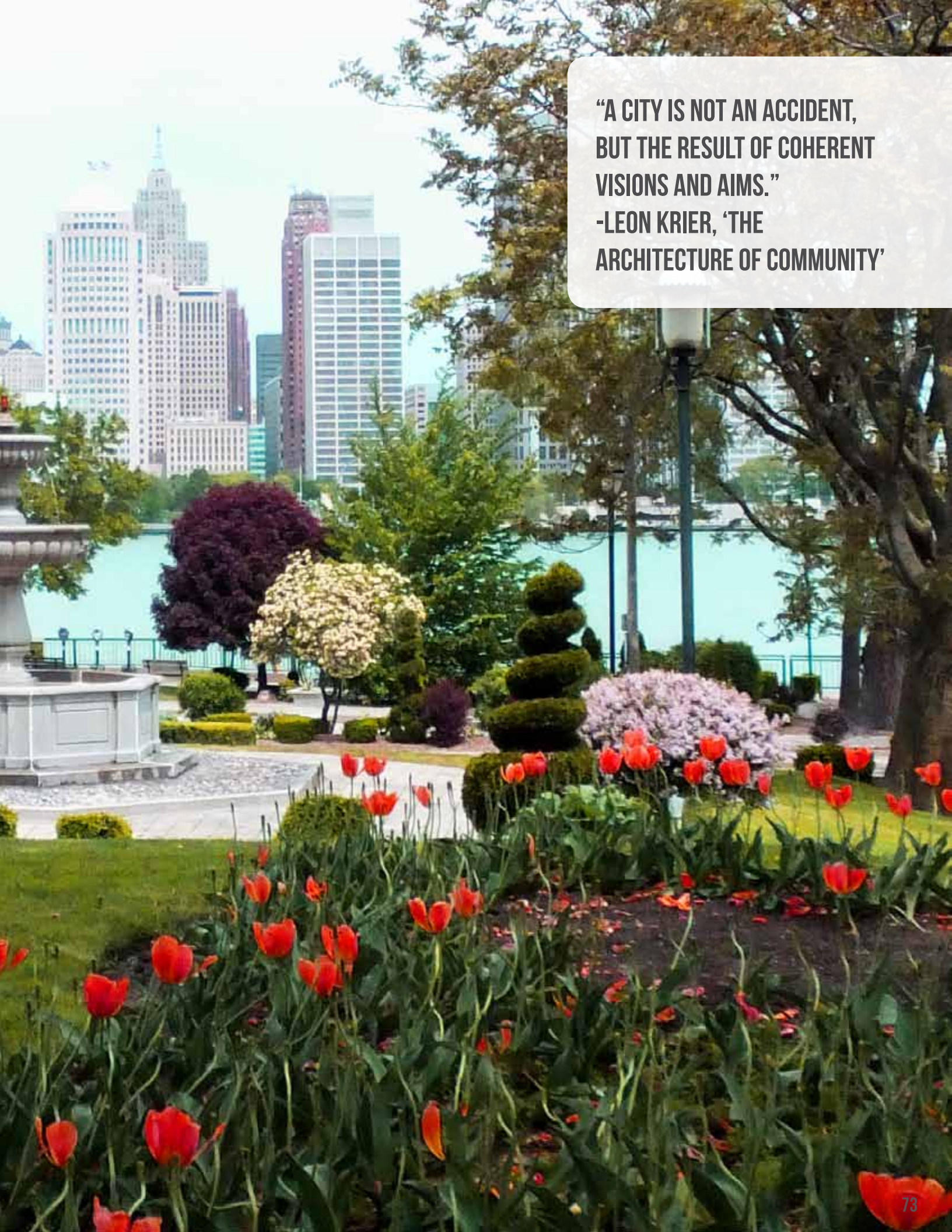
Data from every downtown was compiled by its corresponding City based on a list of major capital projects in the Downtown (1998-2011). There could be other smaller scale improvements that have not been captured in this data. Additionally, this data does not reflect individual grants, loans or incentives in the downtown.

QUICK WINS

Over the course of CUI's research it was apparent that many cities in Canada – both large and small – have come up with all manner of great ideas to strengthen their downtown cores. Moreover, CUI learned of other best practices from around the world that have also been highly successful at contributing to downtown revitalization.

This section is by no means a comprehensive review of best practice approaches to downtown revitalization. Rather, it intends to share some of the best ideas or the quick wins that the study team came across through its research.

These ideas are all about making better use of what is on the ground to achieve increased vitality without spending a lot of money. This section is aimed to spark ideas that could be tailored and applied to meet the needs of any downtown across Canada, as well as provide an evolving base of knowledge that can be built on and strengthened for years to come.



**“A CITY IS NOT AN ACCIDENT,
BUT THE RESULT OF COHERENT
VISIONS AND AIMS.”
-LEON KRIER, ‘THE
ARCHITECTURE OF COMMUNITY’**

MAKING USE OF UNDERUTILIZED SITES AND SPACES

Almost all of the downtown case studies had many vacant sites and/or surface parking lots. In the long term, these sites offer immense opportunity for redevelopment.

Yet in the short term, these vacant sites can be detrimental to downtown density, the pedestrian experience and people's overall impressions of the core.

Around the world cities are beginning to temporarily transform vacant lots into more humanized spaces that can both revitalize and differentiate the downtown core, until market conditions are in place to achieve a major redevelopment.

Street food programs are growing in popularity as both a means to expand the cultural offerings of a city and to grow the local economy of small businesses and entrepreneurs.

Portland has had high-profile success with its city-wide food cart program, including a downtown cluster of about 20 vendors that form an interesting, attractive envelope around a large surface parking lot.

Food trucks have also been successful in the revitalization of Gore Park, Hamilton. Parking lots can be used for programmed events, such as the farmers markets at Square One in Mississauga or an outdoor cinema.

Similar initiatives are already underway in Edmonton and Saskatoon, yet these programmed events could be expanded to make use of publicly owned parking lots, particularly on weekends. Fun events like PARKing day, born out of DIY urbanism, where citizens build small parks on to parking lots, are now worldwide and were successfully undertaken in downtown Victoria.

On larger sites there are also opportunities to increase their value in the shorter term until the market conditions are in place for a large scale redevelopment, such as energy generation or urban farming.

Copenhagen is a good example of the former, developing waste incineration plants in the city to solve the problem of the lack of space for waste whilst generating more energy for the city, and putting inner city spaces to good use.

The BIG-Bjarke Ingels Group Waste-to-Energy Plant furthers this effective use of underutilized space by aiming to create this 95,000 square meter development, also Denmark's largest environmental initiative, along with creating a 31,000 square meter ski slope on the roof, made up largely of recycled material. This ensures effective pedestrian connections while readdressing the relationship between waste management and the public.

Barcelona is a further example, requiring solar energy sources on new builds, and with its creation of Europe's largest sculptural solar panel (10,500m² surface area) in the Forum Esplanade's promenade.

Additionally, out of adversity, the world's largest urban farm (Hantz Farms) is being developed in Detroit by turning abandoned properties into agricultural fields. Many large and underutilized sites could lend themselves to this type of use.



Food trucks can add vitality and functionality to otherwise vacant strips in Calgary, AB

MAXIMIZING USE OF DOWNTOWN FACILITIES

A mix of uses increases downtown vitality. Yet this concentration of activity can be even further strengthened by encouraging downtown facilities to have multiple uses at all times of the day and night.

Some examples of this were 'The Atrium' in Victoria. This office development includes a large atrium that hosts performances and has late night restaurants around its edges bringing people to the building well beyond 9-5.

Similarly, some Toronto dance troupes have been finding rehearsal space in the the lobbies of large buildings.

Another interesting arrangement is between Ryerson University and AMC Theatre, where the movie theatres are used for both university lectures and to screen films.

These types of opportunities and partnerships could be more commonly considered to make better use of infrastructure, as well as add colour, interest and activity to the core.



The Atrium, Victoria, BC



Skating in Market Square, Downtown Kingston, ON

EMBRACING THE WINTER

Many downtowns in North America and Europe have embraced winter and are busy, interesting places year-round.

Perhaps the most famous example is Copenhagen, where sidewalk cafes remain open throughout the winter thanks to efficient heating, partial enclosure, free blankets provided by cafe owners, and vibrant street life that is worth sitting out in the cold to watch. In Canadian cities, on the other hand, sidewalk cafes are generally dismantled in November (if not earlier).

Skating is an accessible and popular winter activity that brings people outdoors. Downtown skating rinks are often iconic landmarks in their cities, like those at Rockefeller Center in New York City, or in front of the city hall in Toronto, or at Market Square in Kingston.

A length of the Rideau Canal, running through central Ottawa, is turned into a popular linear skating rink every winter and attracts skaters both locally and from across the country.

Large winter festivals like Quebec City's Winter Carnival, Charlottetown's Jack Frost Festival or Ottawa's Winterlude are effective ways to draw huge crowds downtown and make lots of people more comfortable with the downtown in winter, but such massive efforts are not always necessary.

Holiday-themed markets, for example, require only a small investment to operate in downtowns that already have regular outdoor farmer's markets in the summer, and are often very well patronized.

As at all times of the year, having good seating, interesting activities like musicians or buskers, lots of (warm) food and drink, welcoming lighting, and clear sidewalks are essential to making downtown hospitable.

CONNECTING THE DOWNTOWN WITH NATURAL FEATURES

Vibrant waterfronts, view planes to mountain ranges or natural features and natural corridors are just some of the ways that downtowns are trying to ensure that their cities feel a connection with the natural world.

Some downtowns have been highly successful with this. For example Ottawa, Fredericton and London have extensive trail systems radiating outward from the downtown core along their waterfronts, while other downtowns such as Kingston, Windsor, Edmonton, Toronto and Saskatoon have gone to significant effort to connect city dwellers with the waterfront through the creation of new parks and public amenities.

The North Shore Spirit Trail is also under development and will create regional connections with Lower Lonsdale in North Vancouver via a multi-use, fully accessible greenway from Horseshoe Bay to Deep Cove.

Another stand out is Vancouver's Stanley Park, connected to waterfront trails, that brings the beauty of nature to the centre of the city and provides spectacular mountain vistas. Both Vancouver and Halifax have developed strong design policies to protect view corridors.

PROGRAMMING PUBLIC SPACES IS A CRITICAL ELEMENT OF ANY DOWNTOWN'S EFFORTS TO DRAW PEOPLE OUT OF THEIR HOMES AND CARS IN THE WINTER.

CREATING COMPLETE COMMUNITIES

There is a trend in North America for young people, professionals, and older couples to move to the city centre to experience an urban lifestyle.

Cities are generally trying to capitalize on this trend and going to great lengths to attract the lucrative young-professional demographic. Yet sometimes downtowns may be “getting too much of a good thing.”

If the downtown does succeed at attracting more residents it is also important that it can attract a wide range of household types from a wide range of backgrounds, age groups and income brackets.

The City of Vancouver has made some strides here, pioneering designs that provide 2-3 bedroom units in the lower floors of residential buildings that look out over communal space where children can play. Additionally, high levels of safety and good schools are important to attracting families to life in a downtown core.

The City of North Vancouver has also been working hard to attract a range of housing types to its downtown core.

BUILDING STRONG PARTNERSHIPS

Building great relationships and strong partnerships is easier said than done, but collaboration is critical to achieving an exciting, diverse and prosperous core.

Several interesting partnership models have been identified in the downtown case studies, which have helped generate increased investment and vitality. For example, the Charlottetown Area Development Corporation (CADC) is a self-financed entity representing a partnership between the Province of PEI, the City of Charlottetown and the Town of Stratford. CADC attracts private sector commercial development and investment and has played a major role in redeveloping downtown Charlottetown’s waterfront.

In Downtown Halifax the Strategic Urban Partnership provides a forum for people to meet and discuss new developments and partnerships opportunities. This forum has been successful at connecting key stakeholders from different sectors and company backgrounds.

Similarly Edmonton created the Downtown Vibrancy Taskforce comprised of ‘blue ribbon’ businesses, community and social agencies that work together to prioritize and implement catalytic projects identified in the downtown master plan.

Winnipeg established the arms-length agency Centre Venture, which has had tremendous success at forming the partnerships and conditions needed to realize major investments and redevelopment projects.

Waterfront Toronto is another example of an arms-length agency that has bought more agility, flexibility and responsiveness than might be possible with a larger government agency. Waterfront Toronto has brought together three levels of government, quasi public and private interests to begin the transformation of the shores of Lake Ontario.

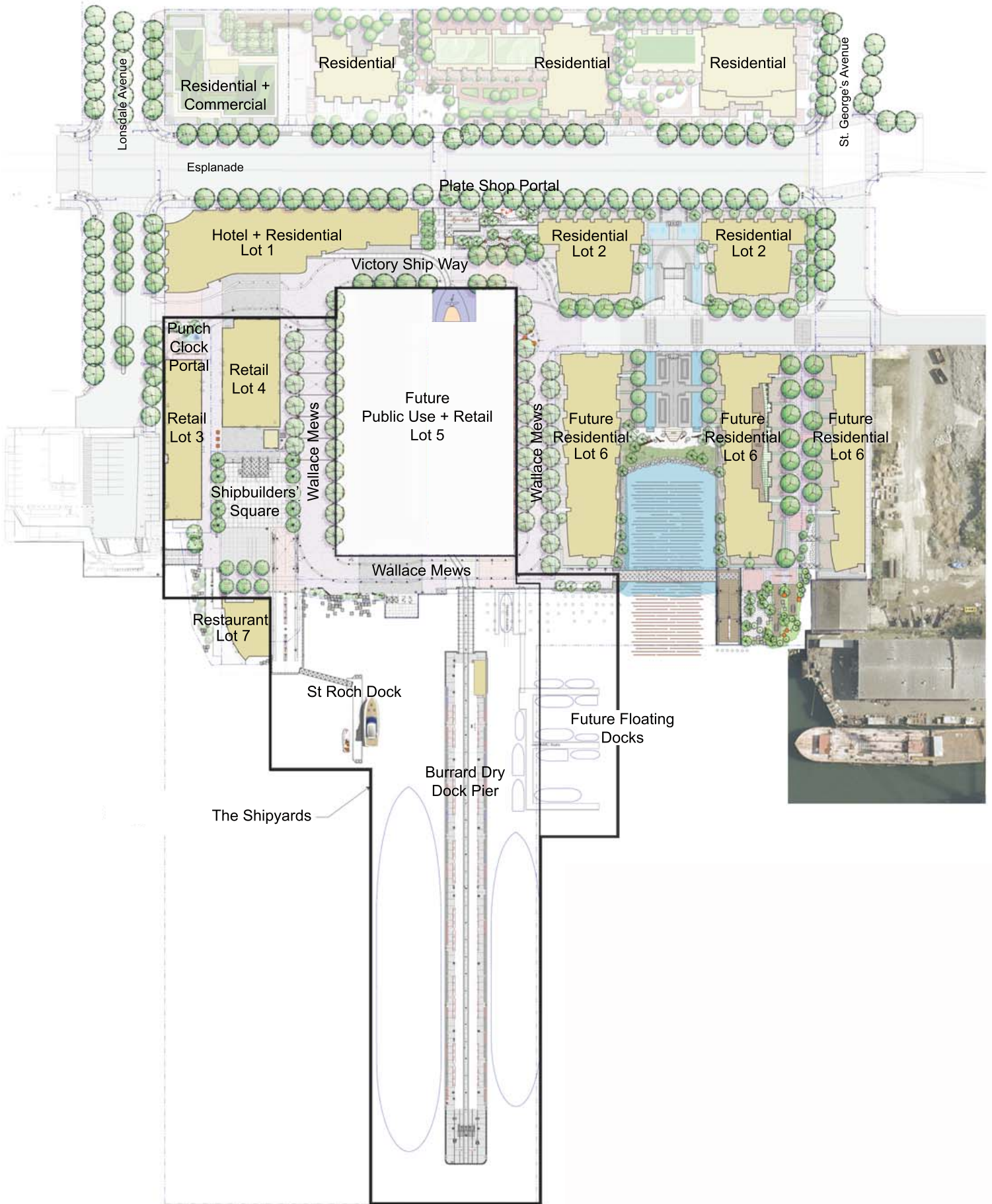
Partnerships are also important for realizing the full potential of individual redevelopments, and the Woodward’s Building in Downtown Vancouver demonstrates a successful partnership between Simon Fraser University, the Goldcorp Centre for the Arts, the City of Vancouver and the wider community.

Business improvement organizations can offer municipalities with a strong partner with high levels of commitment to downtown revitalization efforts.



“ WITHOUT A DOUBT, A SUCCESSFUL DOWNTOWN IS CRITICAL. THE CITY’S INVOLVEMENT IS EVEN MORE SO. DOWNTOWN’S DON’T HAPPEN - MOST OF THEM HAVE TO BE NURTURED AND WORKED ON FROM BOTH THE PUBLIC AND THE PRIVATE SIDE. ”





North Vancouver Pier Development Plan

QUALITY PLANNING PROCESSES AND COMMUNITY ENGAGEMENT

Halifax, Victoria, St Catharines, Regina, Kingston, Hamilton and Edmonton have undergone comprehensive planning processes to bring together and unify downtown stakeholders. Moreover London, Saskatoon, Ottawa and Fredericton are in the process of developing and/or releasing a new downtown specific master plan.

There was a general impression from interviewees that these planning processes were highly beneficial and were able to unify stakeholders, particularly the private sector with the public sector. Yet it was also emphasized that it is critical these downtown plans are underpinned by an investment strategy to make sure they can be implemented on the ground.

Zoning and regulatory tools can also offer municipalities with a strong tool to realize its plans. For example Downtown Edmonton addressed its large supply of parking by creating an innovative by-law package that limits additional downtown parking from being built.

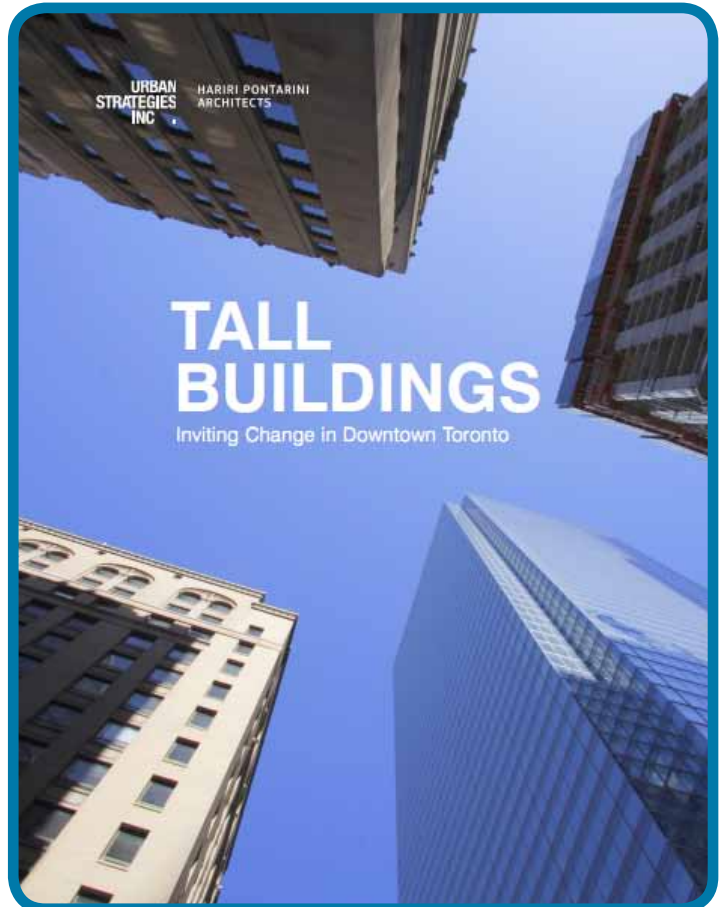
Similar moves have been made by other cities in North America and Australia. These tools also influence the type of use that can be developed on site.

For example, the City of Vancouver undertook its Metro Core Jobs and Economy Land Use Plan and implemented a series of policies to help protect land for commercial uses into the future.

Regina has also used planning policies to help concentrate jobs and employment within the core. Policies direct larger scale office buildings to the downtown core, except in limited and specific contexts (e.g. accessory to an institution). The new policy will ensure at least an 80/20 split between the central area office inventory and the rest of the city to maintain the core's dominance. A similar policy also exists in London, Ontario.

Planning processes can also deal with issues of contention in a community. One issue that was frequently raised was the height of new developments in the downtown. This issue seems to routinely aggravate the relationship between the public and private spheres and imposing building height regulations is a common response.

Vancouver and Toronto have both addressed this issue through the Downtown Vancouver Skyline Study and Toronto's Tall Buildings Plan, respectively. These planning processes have helped bring together the community and the private sector to ensure that the new development does not come at the cost of qualities the community most strongly values.



Toronto's Tall Building study has helped guide large development forms in the downtown core.

IN RECENT YEARS, THE DOWNTOWN CASE STUDIES HAVE INCREASINGLY BEEN THE SUBJECT OF DOWNTOWN-SPECIFIC MASTER PLANS.

REACHING THE BALANCE WITH HERITAGE

Balancing heritage preservation and new development is a major challenge for many cities. Moreover, communities can quickly become polarized around these issues and discussion can rapidly degrade to either “development equals destruction of heritage;” or “protecting heritage equals economic decline.”

Yet cities can have the best of both worlds and simultaneously achieve heritage protection and economic growth.

When Halifax found itself locked in a stalemate over heritage and development, it reversed the situation through an inclusive planning process that aimed to achieve a more positive dialogue with a focus on good design outcomes. This process has delivered design guidelines that have built trust, certainty, contributed to new development and encouraged significant re-investment in the Downtown’s treasured heritage buildings.

Downtown Kingston has also enhanced its heritage buildings, particularly heritage facades, by offering tax incentive and grants. Downtown Kingston! BIA and the City recognize these efforts through an awards program. Additionally, the Kingston’s Official Plan prohibits large format retail uses that interrupt pedestrian traffic and the building fabric in the

downtown. Therefore national retailers have had to adapt from their typical suburban forms in order to open locations downtown, which helps to enhance heritage qualities and create a high quality public realm.

Some cities are also managing challenges associated with past decisions to demolish heritage buildings. More specifically, many downtowns across Canada were the subject of major provincial or national urban renewal programs that left the super blocks (large scale retail or housing developments that are invariably inward looking).

In London the Galleria Mall opened in the 1960s, occupying one major street block and providing high, blank walls along each elevation. This mall has since folded and the City should be applauded for its efforts to revitalize the building and reconnect it with surrounding streets by attracting the new central library, office space, a post secondary institution and a smaller retail component (i.e. Goodlife Fitness with direct street access).

The Toronto Eaton Centre also sets a great example and has attempted to activate almost all of its edges to the street allowing for traffic to move seamlessly between the mall and the streets outside.





Town Clock, Downtown Halifax, NS

INNOVATIVE APPROACHES TO FINANCING NEW DEVELOPMENTS AND INFRASTRUCTURE

Cities have a number of incentives they can deploy to promote new development. The permits for certain kinds of proposals, for example, can be moved to the front of the queue, receiving quicker approvals. Application fees, development charges, and parking requirements can also be reduced or waived.

For example, the City of Ottawa waived development charges for a number of years, which coincided with a major influx of new residents to the core.

Some cities are experimenting with tax increment equivalent grants or loans, which essentially delay property tax increases on properties that are developed in ways that support city policy. Grants are given in anticipation of future tax revenue.

More specifically, the City of London has established a suite of downtown grant and incentive programs, as well as targeted incentive programs for its 'main street' that have been highly successful at attracting private sector investment. Since 2008 the City of London has issued a combined total of 104 grants and loans worth \$1.1 million, leveraging \$3.8 million in construction value from the private sector.⁷

Toronto has also leveraged high levels of private investment in the public realm through Section 37 of the Ontario Planning Act. This arrangement has allowed the developer to gain increased density and height in exchange for investment in various types of social facilities that will provide a public good.

Similarly, as part of the Pier Development on the waterfront, the City of North Vancouver negotiated nearly \$40M worth of public amenities provided by the developer at no cost to the taxpayers.

Another highly innovative approach to funding was established in Saskatoon by The Partnership. This collaboration between the City and the business improvement district sees money collected from parking meters being spent on upkeep and improvements of infrastructure. This has been successfully implemented since the 1980's and has resulted in major streetscape upgrades through the downtown.

⁷ City of London. (2011). *State of the Downtown Report 2011*. Retrieved from: http://www.london.ca/Planning/PDFs/SOTD_AnnualReport_09.pdf. Accessed 2011 October 20.

ENCOURAGING ALTERNATIVE MODES OF TRANSPORTATION

A highly visible and irritating quality of any successful downtown is congestion. Yet a certain amount of congestion contributes to the “buzz” associated with vibrant downtowns.

The greatest asset of any downtown is its density of people and jobs, and its intensity of activity. The challenge for cities is to accommodate as much density and intensity as possible without grinding to a halt or affecting the quality of the urban experience. The key is to find the balance.

In contemporary Canadian cities, this generally involves getting people out of their cars, because automobiles are inefficient users of land and incompatible, in great numbers, with vibrant, prosperous downtowns. While transit undoubtedly plays a key role here, there are other less costly options that could be considered to help move people away from private vehicles.

Residents of several Canadian cities have access to car sharing programs which offer residents short-term rentals at an affordable cost. Car sharing programs allow downtown residents to live without the high costs of maintaining or parking a car, while still having a convenient option to drive when necessary. Many municipal planning departments are requiring condominium developments to provide car shares in parking lots.



Bixi bikes in Montreal, QC.

Similarly, bicycle sharing programs have recently been established in a number of North American cities. As well as serving local residents they have the added attraction of being accessible to tourists and non-drivers. In combination with safe cycling infrastructure, bicycle sharing can make short trips around the downtown faster and more reliable than by car or public transit.

Today, these programs tend to be unprofitable in Canada, but they are still young; the oldest, Montreal's Bixi, has only been in operation since the fall of 2008. Downtown Toronto and Ottawa also have Bixi programs.

The availability of car parking also significantly influences car usage. If there is ample and cheap supply of parking in a downtown, it will be incredibly difficult to encourage people to consider other modes of transit to access the Downtown. Yet pricing parking effectively can act as a deterrent and also help reflect the real cost of parking on a downtown core.

In San Francisco, a new system of 'smart parking' has been implemented, whereby sensors monitor spaces and determine prices based on parking data. The cost varies by time, day and block, and the price is adjusted every six weeks or so based on supply and demand. This scheme was set up as an attempt to reduce car use and congestion in the city centre, and also allows online checking of parking space availability.

A HIGHLY VISIBLE AND IRRITATING QUALITY OF ANY SUCCESSFUL DOWNTOWN IS CONGESTION. YET THIS IS ALSO WHAT CONTRIBUTES TO THE 'BUZZ' ASSOCIATED WITH A VIBRANT DOWNTOWN.

APPENDIX 1: PROJECT DESIGN

This study has been designed to have two key components.

Firstly, it aims to provide an in-depth analysis on the performance of 17 downtowns. It brings together a wide range of data on how a particular downtown has been performing overtime and how it is performing relative to the rest of the city.

Secondly, this report aims to compare the results from these in-depth case studies to see how downtowns are performing across Canada.

To achieve these aims we have developed a consistent approach to defining the downtown boundaries, collecting data and measuring and benchmarking performance. These components of the project and approach to achieving them are described in the following pages.



PROJECT COMPONENTS

IN-DEPTH ANALYSIS OF 17 DOWNTOWNS :

CUI designed the study to include an in-depth analysis for seventeen downtown case studies to date. This analysis provides an overview of how the downtown case studies have evolved overtime and important lessons that the downtowns have learned throughout their development.

To inform this analysis, the project team researched each downtown case study (within a defined downtown boundary) by collecting quantitative data; Geographic Information Systems data (GIS); and interviews with key stakeholders. The study team then used this data to measure and provide an assessment on how well the downtown had performed.

COMPARISONS BETWEEN 17 DOWNTOWNS :

CUI studied 17 unique downtowns that stretch from east to west across Canada. These downtowns range in population from the thousands to the millions and serve many distinct roles and functions. This diversity creates many challenges for a benchmarking study. The in-depth analysis is intended to maximize opportunities for comparison between the downtown case studies.

More specifically, to achieve comparability, every downtown was assessed against the same five principles and indicators that were developed to consistently present data collected from each city. Key indicators were also selected based on some of the more interesting results of this study to allow for a quick overview of key findings and an easy way to compare the varying cities to each other.

DEFINING DOWNTOWN BOUNDARIES

The first challenge for almost every project partner was defining the boundary for the downtown case studies. Every single person living in a city will likely have a different understanding of what constitutes their “Downtown” based on their personal frame of reference – are they a resident, a worker, how do they utilize the downtown and how often? - and the project partners had to balance these various expectations and other key considerations in selecting this boundary.

CUI provided support to each project partner to create a boundary that made sense for each city. The preferred approach was adopting the working definition of “Downtown” used by the relevant municipality in plans and policies. Yet, where the municipality had not created a definition of the “Downtown,” CUI developed general criteria and considerations to help guide the creation of these boundaries.

There were four key criteria/considerations for defining the downtown:

Financial core: Firstly, the downtown study area should function as the central business district for the wider city and/or include the city’s historic financial core.

Diverse ‘urban’ elements: Secondly, the downtown study area should include diverse urban elements such as the City’s main “high street”; a concentration of commercial and mixed use buildings; major civic buildings, such as the City’s Town Hall; major public spaces, such as a city square or plaza; religious or ceremonial spaces. Other features include high density residential housing well served by public transportation. This should ideally also generate high volumes of pedestrian traffic.

Hard edged boundary: Thirdly, the study area would ideally be bound by a hard edge, from manmade features such as major streets or train tracks, or a natural feature such as a body of water. Hard edges provide a clear justification for the location of the boundary.

Workable for data collection: Lastly, an overarching consideration is that the data being compiled must align with the selected downtown study areas. Therefore project partners had to consider Census Tracts and other important data collection boundaries that would make the study area workable and logical for the purposes of the project.

The study has been designed to balance challenges that come with each city determining their own boundaries. For example, some cities have decided on more generous boundaries than others. This could mean that when collecting raw data, the population of residents or jobs etc may appear to be larger than if a smaller area was selected.

To balance this, CUI measures many intensity factors (for example population and jobs per hectare) and trends over time (% growth), alongside raw numbers to allow for a clearer picture of downtown activity.

Moreover, this study provides significant commentary about key assets or pieces of infrastructure just beyond downtown boundaries, as well as the inner core suburbs that support each of the downtown case studies.

Overall, endless debate could be had around the exact boundaries of a downtown, what constitutes a downtown and what elements should be 'in and out.' Yet it is the hope of this study that anyone picking up this report and flicking to their home city will generally think : "Give or take a little, this downtown boundary makes sense to me for my own home city."

DATA COLLECTION

To gain a clear picture of what is happening in each of the 17 downtown case studies the project began with an extensive data collection phase. This stage was guided by CUI but was undertaken by the project partners.

It is important to emphasize that this is just the first step toward building a body of data that specifically relates to Canadian downtowns. CUI would encourage that this project is regularly updated and refined to ensure that a body of data relating to Canadian downtowns will grow into the future.

QUANTITATIVE DATA

Quantitative data was collected to develop a specific set of data that could help identify key trends occurring in the downtown overtime. The collection of quantitative data was generally undertaken by the municipal project partners with the support of their downtown BIAs. CUI guided this process through a standard Data Request List. To collect the diverse range of data requested, the project partners needed to facilitate conversations between their City's Planning, GIS and Finance Departments.

Data requested covers the following four key areas:

CENSUS DATA (2001, 2006, 2011): Data collected has covered three national census periods –2001, 2006 and where available 2011. Data requested relates to population, age structure, dwellings, labour force, ethnicity, incomes, employment, housing tenure, transportation and crime rates.

DOWNTOWN ECONOMY DATA: Economic data was collected to determine the economic health of the downtown and the wider city. This data was generally collected for the past decade and included: building permit activity and investment, commercial floor space, rents, vacancy rates, business growth, tourism and jobs.

MUNICIPAL FINANCE DATA: Municipal financial data was collected to derive the revenue generated by downtowns across Canada. This data was generally collected for the past decade and included taxable assessment data, tax revenue and non-tax revenue data for both the city and the downtown.

CAPITAL PROJECTS DATA: Understanding the types and impacts of capital investments was a key part of this project. Therefore, the project partners compiled downtown capital budget and city wide capital budget information. This data has created many

challenges for those responsible for data collection as it is often not collected on a downtown basis. This data provided a detailed picture of the downtown and its health overtime.

GIS DATA

The CUI developed an extensive GIS platform through this project to spatially represent the characteristics of each downtown.

The CUI was provided with GIS data that included: downtown and citywide boundaries, land uses, zoning, roads and transit routes, parcels fabric, heritage properties, assessment roll and building footprints.

This data allowed for the development of all the mapping components included in this project: a context map, a land use map and a capital projects map.

INTERVIEWS

Interviews were undertaken with a wide range of downtown stakeholders to develop local insights and knowledge into downtown growth and development. Questions asked during the interviews captured a range of perceptions, impressions, experiences, and opinions.

They covered themes such as: changes experienced in the downtown over time; perceptions on the downtown as a place to live/work/invest; aspirations for downtown future growth; leadership and partnerships; public and private investments, what drove these and their impact on the life of downtown; incentives and tools that have been adopted to strengthen and attract private investment in the downtown.

CUI spoke with all types of downtown stakeholders, such as politicians, planners, developers, downtown residents, business people, artists, architects and advocates to gain a diverse range of views. These interviews helped to augment data gaps and provide context for the data being reviewed. A minimum of five interviews was undertaken for each downtown. A full list of people interviewed is included in the “acknowledgements section.”

DATA LIMITATIONS

This project is the first of its kind, and to date no body of data specifically relating to “downtowns” exists in Canada. This project is a first attempt to compile downtown StatsCan Census data (2001, 2006, 2011), downtown economy data, municipal finance data, capital projects data and GIS data.

As a result, the project team faced some significant challenges with managing data gaps: such as accessing the data we required to undertake our analysis; to access data in a usable and understandable format; and to access consistent sets of data so we could compare City performance.

The partner cities also faced some challenges with having the time and resources available to support this very large data request.

DATA GAPS

From the outset of this project, it was clear that very few of our participating cities have organized data that distinguishes the performance of their downtown from the rest of the city.

There are some notable exceptions, the City of London has been tracking the performance of their downtown in great detail for more than a decade; the City of Edmonton have recently undertaken a detailed downtown master planning process where significant data was compiled and the City of Saskatoon have also recently completed a very exciting inventory project in their downtown to map and count downtown activity.

However, generally the data sets requested were being developed for the first time, which resulted in some cities not being able to fill the data requests or not being able to fill the entire request. As a result we have some of the following data gaps.

STATSCAN CENSUS DATA (2001, 2006, 2011): Given that the 2011 census data was not available when the first volume of this study was released, CUI updated and incorporated this data where possible for all 17 cities. This has allowed the CUI to provide up to date comparisons for all 17 downtowns studied. Also, to more accurately provide census information within the downtown boundaries, CUI developed a tool to provide population and dwellings estimates for 2011.

Another challenge CUI faced with Census data resulted from boundaries being redrawn between census periods. The project team have identified all places in the report, where this limitation has arisen.

DOWNTOWN ECONOMY DATA: Generally, downtown economy data was available to the project study team. Yet, many cities did struggle to access information relating the number of jobs in their downtown, as well as office space inventories and data on construction values and building permits that specifically related to downtown activity.

Less than a handful of cities had access to a retail inventory downtown. The project team was also unable to gain any data relating to retail sales downtown. It should also be noted that CB Richard Ellis provided support to the project team by generously providing office data for a few of the downtown case studies.

Overall, if the project team exhausted all options to fill these data gaps and was unsuccessful, then the partner city has been simply left out of the comparative analysis.

MUNICIPAL FINANCE DATA: The project study team found that municipal finance data, tax revenue and assessment is generally not collected on a downtown and city wide basis, so collecting this data involved significant effort from the finance departments of our partner cities.

With limited resources, some cities were only able to provide information on assessment base or tax revenue generated downtown and not both. Moreover, for the partner cities where a business improvement association was driving this study and not the municipality, such as in the case of Downtown Yonge for the City of Toronto, it was a significantly greater challenge to gain access to this type of sensitive data.

As a result, some cities do not have complete sets of data for the municipal finance indicators. Again, if the project team exhausted all options to fill these data gaps, then the partner city has been simply left out of the comparative analysis.

CAPITAL PROJECTS DATA: The biggest challenge for the project team was gaining an understanding of the portion of the capital budget being spent on the downtown. It is clear that almost every city organizes their budgeting process differently, with different elements in capital and operating budgets.

The vast majority of cities do not track capital investments geographically instead they track investments by departments so it is incredibly challenging to separate out downtown investments from city wide investments.

Moreover, an additional challenge is that cities develop a budget (forecasting) and then an actual budget (the money spent), and the actual budget (which the study team was interested in) can be very difficult to gain access to. To manage this gap, we have not been able to compare number of capital projects and portion spent on capital projects between cities overtime. Yet, this is some of the most interesting data collected, and is incredibly valuable for individual cities to review what is happening within their own boundaries.

As this project evolves into the future it is the hope of the project team that detailed capital projects data can start to be collected for every downtown case study.

Therefore, given these limitations to compare the level of investment for all our partner cities, the study team have developed a “Capital Projects Map.” This map depicts municipal expenditure and develops a category to see the type of investment. The study team have included all major projects and enhancements to the downtown that have been designed to grow interest in the downtown as a place to live, work and invest.

GIS DATA: The project team faced few limitations collecting GIS data. Generally, developing a quality GIS base seems to be a growing priority for all cities in Canada. Moreover, open data sites (such as in the City of Fredericton and the City of Vancouver) seem to be a growing trend.

RESOURCES

Collecting this data was a significant commitment for all partner cities. Many cities simply did not have the resources to commit to delivering this complete data request. As a result cities that did commit a high level of resources have much more complete data sets than cities that were challenged by a lack of resources.

Overall, this is a dynamic document and it is the hope of the study team that the importance of collecting data on downtowns will become a growing priority for cities across Canada. In time, it is hoped that data will continue to be collected for downtowns and eventually data will be fully available so every partner city can have a complete data set.

MEASURING AND COMPARING DOWNTOWN PERFORMANCE

Once this data was compiled and provided to the CUI, the study team organizes, synthesizes, and assesses the data against the five principles required for a successful downtown. CUI developed these principles following an extensive literature review and research into what factors contribute to a strong, vibrant and liveable downtown.

PRINCIPLES

The CUI developed a set of principles to explain and measure what makes a successful downtown in Canada. The principles had to be sufficiently broad and robust to account for the fact that each downtown is unique, with different characteristics, attributes and conditions that have shaped their evolution. Yet the principles must also be specific enough to allow for comparisons between the various downtown case studies to determine how they are performing over time and into the future.

DEVELOPING THE PRINCIPLES

The CUI developed these principles using a three-pronged approach. Through stakeholder surveys, extensive literature review and the lessons from the successes in the downtowns studied, CUI determined five key principles against which the 17 downtown case studies will be assessed. The foundation of the five principles was the survey distributed to the Institute's Board and network of practitioners to answer the question - WHAT MAKES A DOWNTOWN GREAT? Based on the feedback received, the team developed the preliminary principles for analysis.

THE FOLLOWING REFLECTS THE OUTCOME OF THIS ENQUIRY:

ARCHITECTURE AND DESIGN: landmark projects, heritage protection, development at the human scale

CONNECTIVITY: appropriate forms of public transit, walking, cycling, marine, design for all ages

CULTURE: vibe, values, virtuosity

INNOVATION: education and research, partnerships and networks, venture capital, universities and colleges, educated and skilled labour force.

EMPLOYMENT: a variety of and medium sized enterprises, creative industries, diverse economic base

PUBLIC REALM: quality streets and streetscape, plazas and squares, parks and other gathering places, destinations, private space that enhances the public realm (e.g. sidewalk cafes)

SUSTAINABILITY: sustainable development, good air and water quality, community energy projects

DIVERSITY: open fluid society that facilitates participation and opportunities for new immigrants

VENTURE CAPITAL: availability of venture capital and management of research market

....AND "IT'S ALL THESE THINGS AT ALL TIMES OF ALL FRONTS" SUPPORTING EACH OTHER THROUGH INFRASTRUCTURE INVESTMENTS, GUIDED BY A CLEAR VISION AND LEADERSHIP WILLING TO TAKE RISKS.

Following this, a literature review was conducted and Michael A. Burayidi's (2001) text, *Downtowns: Revitalizing the Centers of Small Urban Communities*, served as the primary foundation for the research.

From this text, passages from Kent Roberston of Saint Cloud State University were used to help further articulate and define the principles.

Finally, the information gathered from the 17 downtown case studies was synthesized in accordance with the principles and specific examples were discovered which further reinforced the principles we established from the outset.

THE FIVE PRINCIPLES ARE AS FOLLOWS :

The five principles are as follows:

VISIBILITY

Does the downtown have an integral and central role in the life of the wider city?

VISIONARY

Does the downtown benefit from a multiplicity of strong, bold leaders who collaborate to achieve and sustain a shared vision?

PROSPERITY

Does the downtown have a robust and innovative economy?

LIVEABILITY

Is the downtown vibrant, liveable and connected?

STRATEGY

Is the city investing strategically in its future?

The next step was to develop methods of assessment to determine if the downtown case studies are evolving in a way consistent with the five principles. In other words, are these downtowns evolving into great downtowns?

To this end, the team utilized a range of qualitative and quantitative measures and indicators. In collecting qualitative data, the CUI undertook surveys and interviews to learn about the history of each of the downtowns, gain perspectives and insights concerning the drivers of growth and change, as well as to learn about each city's leaders and how they have approached and prioritized downtown development.

The team also analyzed quantitative data and developed indicators to baseline the downtown performance relative to the wider city. The goal is to ensure that quantitative data is consistently available across Canada for each of the 17 downtown case studies.

INDICATORS AND BENCHMARKING

The team then analyzed quantitative data and developed indicators to baseline the downtown performance relative to the wider city. The goal is to ensure that quantitative data is consistently available across Canada for each of the 17 downtown case studies.



VISIBILITY

DOES THE DOWNTOWN HAVE AN INTEGRAL AND CENTRAL ROLE IN THE LIFE OF THE WIDER CITY?

A downtown can have a complex relationship within a large, sprawling city. In the context of ongoing expansion, a downtown can suffer declining interest from the public and private sector, as well as the general community.

Strong public and political support is necessary if downtowns are to remain prominent, strong in the hearts and minds of citizens, and able to grow seamlessly with the city as a whole.

To measure how well a downtown is performing against this principle the CUI team has been undertaking interviews to learn about the history and understand the make-up of each downtown, as well as surveying stakeholders to gain their perceptions on the downtown -- its role, function and vitality.

Quantitative and GIS data is also being assembled on the contribution that the downtown makes to the entire city and how the relationship between the downtown and the city as a whole is changing over time.

INDICATORS TO MEASURE PERFORMANCE AGAINST PRINCIPLE:

- Downtown proportion of land area
- City Typology
- Downtown proportion of population
- Downtown proportion of office, housing, retail and open space
- Downtown proportion of jobs
- Downtown proportion of tax revenue
- Downtown proportion of assessment value



VISIONARY

DOES THE DOWNTOWN BENEFIT FROM A MULTIPLICITY OF STRONG, BOLD LEADERS WHO COLLABORATE TO ACHIEVE AND SUSTAIN A SHARED VISION?

Strong leaders, a bold vision and a high degree of collaboration are critical ingredients for a downtown to achieve its potential. A clearly articulated vision can unite a city’s public and private stakeholders, align their interests and lead to more strategic growth and investment.

To measure the strength of the vision in each downtown, the team analyzed the perceived effectiveness of downtown plans and policies, as well as attitudes towards collaboration and the ways that the public and private sector are working together to achieve the shared vision for the downtown.

INDICATORS TO MEASURE PERFORMANCE AGAINST PRINCIPLE:

- Years that a plan specific to the downtown has been in effect



PROSPERITY

DOES THE DOWNTOWN HAVE A ROBUST AND INNOVATIVE ECONOMY?

A cornerstone of a strong downtown is a prosperous and diverse economy. A strong economy generates jobs and leads to economic opportunity. A strong downtown with vibrant businesses and growth also provides a city with a strong tax base and a major source of revenue.

To measure the strength of a downtown’s economy, the team tracked assessment value for downtown and city-wide revenue and analyzed how this has changed over time.

Data was also collected that examines property market i.e. the types, values and styles of new development for residential, commercial and institutional sectors.

Finally, jobs and household incomes were examined across each city to measure opportunities for wealth generation.

INDICATORS TO MEASURE PERFORMANCE AGAINST PRINCIPLE:

- Commercial office, retail, residential and institutional development (value and changes to inventory overtime)
- Municipal tax base (changes overtime)
- Educational Institutions and Students
- Household income



LIVEABILITY

IS THE DOWNTOWN VIBRANT, LIVEABLE AND CONNECTED?

Presently, downtowns across North America are adopting all manner of tools and policies to stimulate the growth of residential populations in downtown.

This growth is seen as critical to downtown vitality and facilitates activity beyond the working day. This vibrancy allows the downtown to become more attractive to existing residents, visitors and newcomers alike, and cement its place as the literal and symbolic heart of the city as a whole.

One measure of liveability is the strength of residential growth in downtown; another is whether there is sufficient infrastructure available to support a downtown population.

A third indicator is the nature of urban form and quality of the urban fabric to determine if the downtown is offering an interesting urban experience for current and future residents.

INDICATORS TO MEASURE PERFORMANCE AGAINST PRINCIPLE:

- Population growth (changes overtime)
- Migration (domestic and international migration)
- Housing (types and household sizes)
- Safety (crime counts)
- Land use downtown on per capita basis
- Car parking spaces (particularly surface parking)
- Average parcel size, block size and road width
- Transportation mode split



STRATEGY

IS THE CITY INVESTING STRATEGICALLY IN ITS FUTURE?

Public investments should be strategic and maximize opportunities for revitalization in the downtown.

Ideally, they will leverage existing investments and infrastructure and be able to support the investments from the private sector. This allows for the city and the wider community to gain maximum returns on their investments.

To measure the degree to which investments have been made strategically, the CUI examined the type, value and location of public investment. It has also been important to learn about the rationale behind these investments, as well as how various investments fit together to complement and support each other in terms of the vision for the downtown.

A key goal is to determine the extent to which private investments can be said to have emerged in response to public investments.

INDICATORS TO MEASURE PERFORMANCE AGAINST PRINCIPLE:

- Number of capital projects (overtime) and proportion of total capital budget
- Dollar value spent on municipal capital projects and proportion of total capital budget

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- Table of contents
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- Page 6, Page 7
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- Page 8
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- Page 16, Page 17
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- Page 19, Page 19
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- Page 24, Page 25
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- Page 26
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Bottom : Saskatoon's 'Public Spaces, Activity, and Urban Form' report. Photo credit courtesy of the City of Saskatoon. Retrieved from : <http://www.saskatoon.ca/DEPARTMENTS/Community%20Services/PlanningDevelopment/UrbanDesign/CityCentrePlan/Documents/Public%20Spaces%20Activity%20and%20Urban%20Form.pdf>
- Page 29
Charlottetown Convention Centre. Photo credit courtesy of the City of Charlottetown.
- Page 31
Hess Village, Downtown Hamilton, ON. Photo credit : Rick Cordeiro. Retrieved from : <http://commons.wikimedia.org/wiki/File:HessVillageHamilton.JPG>
- Page 32
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Page 34, Page 35

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Page 41

Edmonton food trucks, Edmonton, AB. Photo credit : Mack Male. Retrieved from : <http://www.flickr.com/photos/master-maq/7720544518/>

Page 44

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Page 52, Page 53

Cat Empire performing at the Winnipeg Music Festival, Winnipeg, MB. Photo credit unavailable. Retrieved from : <http://en.wikipedia.org/wiki/File:CatEmpireFF2013.jpg>

Page 64, Page 65

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Page 67

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Page 69

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Page 72, Page 73

Downtown Detroit as seen from the waterfront, Windsor, ON. Photo credit : Aidan Wakely-Mulroney. Retrieved from <http://www.flickr.com/photos/aidaneus/7612700146/>

Page 74

Food trucks in Calgary, AB. Retrieved from : <http://www.avenue-calgary.com/blogs/calgary-food-trucks-hit-the-streets>

Page 75

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Page 76

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Page 80

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Page 81

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Page 83

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Page 85

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Page 86, Page 87

Maman, by Louise Bourgeois, National Gallery of Canada, Ottawa, ON. Photo credit : John Talbot. Retrieved from : http://en.wikipedia.org/wiki/File:Giant_spider_strikes_again!.jpg

Page 98, Page 99

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Back page

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The Redball Project, Old City Hall, Toronto, ON.