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- Downtown Winnipeg BIZ
- City of Winnipeg
- City of London
- Downtown London
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- Downtown Rideau
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Brandon Langille, Researcher

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INTRODUCTION

The Canadian Urban Institute (CUI) has been engaged by the International Downtowns Association – Canadian Issues Task Force to carry out one of the most significant reviews of Canadian downtowns to date. This project is the first of its kind - examining 10 Canadian downtowns (Halifax, Fredericton, Ottawa, Toronto, London, Winnipeg, Saskatoon, Edmonton, Vancouver and Victoria) to assess changes in attitudes, perceptions, functionality and performance over time. This project also aims to inspire and inform city builders, with many excellent and innovative approaches to downtown revitalization that are being applied across the nation.

PROJECT AIMS

Measure the Performance of Canadian Downtowns

This project aimed to measure the economic, social, and cultural health of our 10 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 provide city builders with information (in many instances for the first time) on the levels of growth and investment being experienced in their downtown.

Benchmark the Performance of Canadian Downtowns

The second aim of this project was to be able 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 10 downtown case studies to maximize opportunities for comparability. Data has also been consistently organized into sets of indicators for each downtown; these indicators are often measured on a per capita, percentage or intensity per hectare basis to allow for comparability between downtowns of varying sizes and functions. This provides important information to city builders to gauge how their downtown is developing relative to other downtowns across Canada.

Assess Municipal Capital Investments in Canadian Downtowns

This project aimed to determine the level and type of investments in the various downtowns. To support this aim, 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.

Share Success Stories from Canadian Downtowns

The project also aimed to identify opportunities for Canadian downtowns to overcome the challenges they face and prosper into the future. From the cities featured in this report, it is clear that Canadian downtowns are facing similar challenges and that each downtown is doing at least one thing really well and in a way that others could learn from. This project showcase the most successful and innovative programs and policies being implemented by municipalities and/or business improvement districts in downtowns across Canada.

Create a Baseline for Future Data Collection

Few municipalities in Canada collect data specifically relating to their downtowns. This project aimed to highlight the importance of collecting data on the health of Canada’s downtowns and strengthen this practice. 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.
Additionally this project aims to be a living and breathing document that is constantly evolving. Stage two of this project is currently underway, as Regina and St Catharine’s have signed up to be a part of the study. A second volume of this report is anticipated to be released later on in 2012. As this report is updated, it will incorporate 2011 Census data, which will be fully released by the end of 2012.

**PROJECT DESIGN**

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. In this regard, several downtowns carry the responsibility of being a Provincial Capital. Others function as gateways, either to a continent, a region, or the immediate economic hinterland. Some cities – and therefore their downtown – have had to reposition themselves in light of dramatic shifts in the economic focus of their province or the country; others have needed to demonstrate resilience and staying power, either to replace the economic driver responsible for this creation or to find ways to sustain and continue to lead. The project has been designed to account for these differences and the following section assesses and summarizes the complex dynamic of city building – and downtown resilience – with the use of ten downtown case studies analyzed through five common criteria.

**Principles for a Great Downtown**

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. Firstly the project team surveyed CUI staff and Board members to determine ‘What Makes a Downtown Great?’ (responses are summarized on the right). Secondly 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. The third prong of the approach involved testing the principles throughout the research to ensure that they were being reinforced by our research findings.

The project team surveyed CUI staff and board members on – WHAT MAKES A DOWNTOWN GREAT? – and received the following responses:

**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, 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 market research
From this background research, CUI developed the following five principles for a successful downtown below:

**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 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, the CUI examined the type, value and location of public investment, as well as how various investments fit together to complement and support each other.

**Defining downtown boundaries**

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. Yet defining boundaries is a major challenge, as one can be sure that each 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? 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 in plans and policies. 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 and considerations to help guide the creation of these boundaries.

There were four key criteria/considerations for defining the downtown. Firstly, the downtown boundary had to include the City’s financial core. 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 and residential land uses. Third, 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. Lastly, an overarching consideration was that data compiled was to 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 project has also 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 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, 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 “yes, give or take a little, this downtown boundary makes sense to me for my own home city.”

Data collection and limitations

This project is the first attempt to compile a comprehensive set of downtown specific data across Canada. This project brings together StatsCan Census data from 1996, 2001 and 2006 (2011 StatsCan Census data will be integrated into this study in due course); downtown economy data (from 2000-2010); municipal finance data (from 2000-2010); capital projects data (from 2000-2010) and GIS data. It is noted that unless a source has been provided for the data, the team has sourced data from the respective municipality or business improvement district.

In collecting data to support this project, the team were challenged to access usable and understandable data from consistent sources. These challenges generally stemmed from: municipalities not having data organized in a way that would easily support CUI’s data request, or municipalities being constrained by time and resources to support CUI’s substantive data request. As a result, the project team could not collect complete sets of data for every downtown case study and there are several data gaps. The project team has noted these gaps throughout the report, and left some downtown case studies out of data comparisons. In some instances, CUI was also compelled to develop its own methodology to fill data gaps. Where this has occurred, CUI has provided a detailed explanation of the approach taken.

Overall, it is critical to understand that 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 of data to fully inform decision makers and city builders on the most beneficial ways to approach downtown revitalization.

| A detailed explanation of: the project design and methodology; criteria for defining the downtown boundaries; approaches to data collection and types of data collected; data limitations; and detailed information on project principles and indicators is provided in APPENDIX 1. |
DOWNTOWNS AT A GLANCE

The following image provides an overview of the 10 downtown case study areas:

*All downtown grids are at the same scale*
KEY FINDINGS

The project team developed the following key findings with respect to the overall performance of the 10 downtown case studies, relative to the five principles for a successful downtown:

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

Downtowns across Canada are undergoing a renaissance

Even though each downtown is uniquely shaped by its history, size and geographical context, downtowns across Canada share more similarities than differences. The downtowns featured in this report have each faced many common experiences and distinct stages in their evolution and they are all currently experiencing a renaissance.

The Powerful Downtown - Until the 1950s

Historically the dominant role of Canada’s downtown was secure, and the downtowns all had the advantage of being the most central and accessible neighbourhoods in their respective cities. Downtowns possessed key assets such as major transportation routes and were home to the principal concentration of offices, retail, entertainment, and public services. Moreover these downtowns were developed with well defined street grids, strong heritage features and were closely connected with adjacent suburbs. As is clear from the case studies, all the downtowns benefit from this legacy and remain at the centre of their city’s transportation network, contain historic civic and institutional buildings, are still connected to a strong inner ring of suburbs, are highly walkable, and have a strong heritage fabric.

Toronto in the 1910s

Downtown Saskatoon, 1913
The Declining Downtown – 1950 - 1980s
In the post war era, each of the downtowns featured in CUI’s case studies underwent a period of economic decline and reduced interest; some faced a more serious state of decline than others. This decline was generally brought about by increased congestion in the core, higher land values out of sync with economic returns and deteriorating surrounding neighbourhoods, accompanied by a perception that downtowns were fast becoming less desirable to businesses and residents. The mix of uses was also being seen in a more negative light against emerging zoning regimes that sought to segregate land uses across cities. Moreover, declining support for downtowns was coupled with major technological advancements that were dramatically altering the production and movement of goods and the way people moved around the city. The advent of climate controlled buildings ushered in a reduced interest in street related activity. These factors combined in a powerful way, to hollow out the downtown of businesses and residents and facilitated what is often known as a ‘flight to the suburbs.’ In response to this challenge, downtowns were often the focus of large scale revitalization efforts, such as major highway projects, housing developments and enclosed shopping malls. These projects had varying levels of success, but each project had an enduring impact on the form and structure of the “downtown” for decades to come.

The Downtown Renaissance – 1980s - 90s - 2000s
In the 1980s many municipalities started to re-evaluate what was happening in their downtowns. There was a growing understanding that a strong downtown was not just beneficial to those with vested interests, but was a stimulator for economic growth and potentially a key revenue generator for local government.

Revitalization efforts began once again, but a different approach was adopted than those of the earlier decades. These revitalization approaches focused on enhancing the unique, physical and heritage features comprising the downtown cores. Efforts were focused on areas where the downtown enjoyed a competitive advantage and was able to differentiate the downtown experience from the suburbs. These efforts coincided with renewed attempts to achieve a mix of land uses (rather than the more segregated approach of the previous decades) and had a strong focus on bringing residential development back to the downtown.

During this period, business improvement districts were also starting to grow in strength and contribute to revitalization efforts. The first ever Business Improvement Area (BIA) was established in the 1970s in Toronto’s Bloor West Village and this movement has since spread throughout the world. Currently there are close to 400 BIAs throughout Canada and many of these groups have been working hard to improve quality of life in their downtowns.

Overall, as illustrated in these case studies, downtowns are well on their way to coming full circle. Each of the downtowns featured are surging forward, focused on rebuilding their strength and momentum to emerge as the centre and heart of their respective communities.

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Downtowns are iconic and powerful symbols for a city
The downtowns featured in this report often contain the most iconic landmarks, distinctive features, and unique neighbourhoods in their respective cities. Moreover, given that the downtowns were one of the oldest neighbourhoods citywide, they offered rare insights into their city’s past, present and future. For example, downtown Halifax is one of Canada’s oldest maritime cities where people can experience the past simply by walking the same distinct street grid pattern from the 1700s, looking down to the same harbour, and up to the same Citadel as residents did centuries ago. The downtown case studies also provided a strong representation of the city in the present. For example, Toronto has emerged as a powerful financial centre, its downtown skyline reflects this prosperity and dominance more than any other neighbourhood. Lastly, the downtown provides an opportunity for each city to differentiate themselves. For example, the City of Vancouver is striving to emerge as one of the world’s
greenest cities and many of the major projects that set an example are located downtown.

Downtowns may be physically small in area, but are typically highly visible
The downtowns in this project occupy only a small land area (some do not even take up one percent of their City’s total land area). Yet, these downtown nodes are all major economic, social and cultural hubs and are highly visible and valued by the population at large. Despite this high level of visibility, a challenge frequently referenced by interviewees is that as cities grow in size and area, the downtown can receive declining priority as efforts and resources are directed to building new communities on the peripheries.
Canadian Downtowns

City-Wide Context Maps

Fredericton
- 0.6% (82 ha) of total land area
- 1% (567) of total population
- 2% (1445) of total office space
- 11% construction value downtown

Victoria
- 5% (98.3 ha) of total land area
- 2% (1445) of total population
- 58% of total office space

Saskatoon
- 0.2% (99 ha) of total land area
- 1% (3,430) of total population
- 53% of total office space

Vancouver
- 1% (151 ha) of total land area
- 4.6% (26,590) of total population
- 73% of total office space

London
- 0.2% (99 ha) of total land area
- 1% (3,430) of total population
- 81% of total office space

Edmonton
- 1% (242 ha) of total land area
- 1% (9,330) of total population
- 60% of total office space

Winnipeg
- 1% (350 ha) of total land area
- 2% (13,470) of total population
- 77% of total office space

Ottawa
- 0.1% (307 ha) of total land area
- 1% (7,050) of total population
- 42% of total office space

Toronto
- 3% (1,618 ha) of total land area
- 7% (1,68,604) of total population
- 53% of total office space

Halifax Regional Municipality
- 0.0012% (98 ha) of total land area
- 1% (4,500) of total population
- 46% of total office space

The Value of Investing in Canadian Downtowns May 2012
Prepared for the Canadian Issues Task Force of the International Downtown Association
VISIONARY  Does the downtown benefit from a multiplicity of strong, bold leaders who collaborate to achieve and sustain a shared vision?

A clear and unifying but flexible vision goes a long way
Downtowns with a clear, flexible and unifying vision tended to have the most momentum behind revitalization efforts. A clear vision is important to guide both decision makers and the many individuals responsible for 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. Lastly, a unifying vision is important for attracting enthusiasm, excitement, momentum and above all, connecting independent stakeholder revitalization efforts to resources and to each other.

Realizing a vision for the downtown takes patience
A vision by itself is not enough - 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.

Specific Downtown Master Plans are helping to shape and articulate visions for the core
In the development of a workable vision, many downtown case studies have been increasingly the subject of downtown specific master plans. Halifax, Victoria and Edmonton have recently undergone comprehensive planning processes to develop a vision for the future. Moreover London, Saskatoon, Ottawa and Fredericton are also in the process of developing and/or releasing a new downtown specific master plan. Toronto does not have a master plan for its downtown per se, but it does have broad principles to guide the evolution of the core and the City is implementing various secondary and neighbourhood level plans across downtown.

As well as creating a vision, these master planning processes can be valuable for bringing together stakeholders and building trust and consensus, which can in turn unlock development potential in the downtown. For example, Halifax, London, and
Victoria have very sensitive downtown cores due to the presence of a significant number of heritage buildings. These downtowns have each undertaken planning processes to work through issues associated with how to create positive and respectful development forms, which will enhance heritage qualities. As a result, these downtowns are seeing increased levels of new development, but this is happening in a way that can be understood and supported by the community.

Overall from the dozens of interviews undertaken with both public and private sector stakeholders, there was consensus that these downtown-specific planning processes can be highly beneficial and are able to unify stakeholders across the downtown. Yet it was also emphasized by interviewees that it is critical for these downtown plans to be underpinned by an investment strategy or an implementation strategy to make sure that the great ideas contained in the plan can become a reality.

**Implementation of a downtown master plan must carefully consider local circumstances**

It was also apparent that there is not ‘one way’ to realize a vision and municipalities have adopted all manner of approaches (and in many instances a combination of approaches) to build a stronger, more vibrant downtown. For example, some of the downtowns have benefited from a bold city council that has led by example and demonstrated faith in the future of the downtown through a committed investment program. London, Winnipeg, Saskatoon, Edmonton, and Fredericton have each developed their own approaches to investing in downtown projects that deliver high profile public facilities, a high quality public realm and leveraged private investment and improvements.

Other cities have worked on achieving their vision through a stronger focus on good design. For example, Vancouver has a strong, overarching vision and philosophy for its downtown core, but this is coupled with detailed design guidelines to achieve an aesthetic vision – a “look and feel” of the downtown and its neighbourhoods. The approach is the result of a beneficial partnership between City planning staff, ratepayer groups, and the city’s development community – forged during a period of rapid growth – with support from City Council. Design outcomes also play an important role to achieving the visions developed for downtown Victoria and Halifax. This type of approach seems particularly successful when there is a strong development demand in the core.

Overall what makes these varying approaches successful is that they have each been developed in response to local conditions. Whether it is creating an investment program that is tailored to meet the needs of the city, or working on achieving inspiring new designs in the core, these programs have each been designed to generate increased interest and investment in the downtown core from the community and the private sector.
Implementation efforts benefit from strong partnerships

Building strong and strategic relationships has been a critical element for the downtown case studies to realize their respective visions. Moreover several interesting partnership models have been established that have given rise to increased investment activity and vitality. In downtown Halifax, the Strategic Urban Partnership provides a forum for stakeholders to meet and discuss new developments and partnerships 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 partnership developed through the efforts of Downtown Yonge BIA, the City of Toronto, and Ryerson University also illustrates how a multi-sector collaboration can have beneficial results. Dundas Square has emerged as the nexus of considerable public and private sector investment. Partnerships are also important for realizing the full potential of individual redevelopments and the Woodward’s Building just outside the defined boundary 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. Overall the importance of partnerships cannot be underestimated when working to implement a specific downtown master plan and its accompanying vision.

Tracking and monitoring downtown achievements is invaluable to plan implementation, but rarely carried out

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 quality information and data cannot be overstated. 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.
PROSPERITY Does the downtown have a robust and innovative economy?

Residential development is bringing vitality back to downtowns

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, Edmonton had the highest levels of residential growth. London, Ottawa, and Halifax were also attracting unprecedented levels of growth. Data was unavailable for Winnipeg, but the City has created a major new residential community on a brownfield site along its riverfront. Saskatoon is also likely to be on the brink of significant residential growth, with development opportunities emerging in the city’s new downtown neighbourhoods.

Achieving a vibrant retailing sector is a major challenge for downtowns

The retailing sector in every downtown was severely impacted by the creation of suburban malls in the post war era and then once more by the emergence of the ‘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 emerged from dozens of interviews is that downtown retailing is still challenged by competition from suburban retailing.

Notwithstanding this negative assessment, promising trends for downtown retail are emerging. In the same way that retailers followed residents out to suburban areas in the post war era, so too are retailers following people back into the core.
For example, Toronto’s core has experienced major population growth and has simultaneously seen renewed interest from national retailers such as Canadian Tire and Best Buy stores. Downtown Toronto has also seen more than a handful of large format supermarkets open in the core in recent years. Notably these large format retailers are adopting new compact urban formats. Similar trends have been reported in Vancouver. Winnipeg has also recently attracted a new Mountain Equipment Co-Op. Overall these trends are very positive for downtown retailing and will likely continue as downtown populations continue to grow.

**Downtowns are retaining office space**

Downtowns have generally been able to maintain their concentration of office space and remain at the heart of commerce and jobs in their respective cities. Most have managed to retain over half of their city’s office space inventory. Yet with the exception of London, which introduced policies to direct office space downtown, the portion of office space located in each of the downtown case studies has declined over the past decade. Therefore, if the downtowns are to maintain their dominance long into the future, it will be important that they can reverse this trend and increasingly attract office growth.

Attracting major new office buildings is a challenge for all downtowns. Downtown Edmonton faced close to two decades without a large office development before it managed to attract the new EPCOR building that is reportedly helping to stimulate additional commercial interest. Downtown Saskatoon also faced a prolonged period of minimal activity, until 2009 when the new Discovery Plaza was built. Other downtowns have also seen recent surges in commercial development, for example downtown Winnipeg accommodated the Manitoba Hydro building in 2009. Downtown Fredericton saw the development of the new Chancery Place in 2011; and, The Atrium was developed in downtown Victoria in 2010.

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2 The case of Toronto is somewhat more complex and has been summarized in more detail in subsequent pages of the report.
More than three-quarters of Winnipeg’s office space is located downtown, among the highest proportions in Canadian downtowns. The new Manitoba Hydro Place is a prestigious addition to the downtown skyline.

Department of National Defense is consolidating staff from over 40 locations across the National Capital Region to the former Nortel Buildings. These and other efforts to consolidate federal government employees could have a significant impact on the vibrancy of the downtown core.

Downtowns have a concentration of jobs

The downtowns featured in this report all have a strong and dense concentration of jobs. Unsurprisingly Toronto (by far the largest of the downtowns studied) has the highest number of jobs. Downtown Ottawa follows with the second largest number of jobs, but also boasts the highest intensity of jobs at 318 per hectare. The compact downtowns of London and Halifax have a similar number and intensity of jobs, with 303 and 298 jobs per hectare, respectively. Saskatoon, Winnipeg, and Fredericton have a very high number of jobs, but...
relatively lower intensity, which could be due to the larger land area that comprises their downtown study area. While, Edmonton, Victoria and Toronto each have a similar intensity of jobs in their downtown cores despite the dramatic differences between the physical lay out size of the three downtown study areas.

**Downtowns are increasingly attracting educational institutions**

Many of the downtowns have been successful in attracting post secondary institutions over the past decade. 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/heritage buildings; while downtown Saskatoon has attracted a satellite campus for the University of Saskatchewan. In downtown Vancouver, the redevelopment of the Woodward’s Building is an exemplary project that adds an SFU campus to existing satellite campuses in the core.

This trend is highly promising as the role of post secondary institutions in the downtown essentially provides a double value. Firstly, post secondary institutions 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 each university has a generation of students that may form bonds and attachments to the downtown and decide to stay on after they have completed their studies, adding to a highly skilled labour market.³

Downtowns are making a major contribution to the bottom line of municipalities

Downtowns often take up as little as 1% of citywide land area, but attracted ten or twenty 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.

From the data available, the two cities that made the most significant contribution to their City’s property tax base were downtown Vancouver and downtown Toronto. Downtown Vancouver comprises 10% of the City’s assessment base and generates a fifth of all property taxes collected by the City of 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 although they may have an increasing assessment value, they have a declining portion of the City’s assessment base. Reportedly a City that was cognisant of this trend and managed to reverse it was Edmonton. The downtown had a declining tax base in the 1980s/90s which meant that residential taxes in other parts of the City needed to be raised to maintain City services. As the municipality was beginning to lose a major source of revenue, it started to shift its focus back to achieving a strong downtown core. Today downtown Edmonton is surging forward and is contributing 7% of the City’s assessment base (almost double its contribution from 2004). Other cities could learn from this, where there is evidence that new suburban investment outstrips efforts to intensify the core.

Downtowns also attract a large portion of citywide construction value. Where data was available the downtown case studies averaged around 17% of total city construction value per year (values are pictured right). The percentage of construction value downtown provides some insight on if the city is generally moving towards intensification or decentralization. Additionally as downtowns generally attract increased residential growth, it will be important to keep in mind that tax revenues associated with residential properties are generally lower than taxes associated with commercial properties that could also impact the City’s revenue potential in the downtown core.
**LIVEABILITY**  Is the downtown vibrant, liveable and connected?

**Downtowns are experiencing positive population growth**

The downtown case studies are all enjoying positive population growth. Levels of growth varied, and some downtowns experienced more rapid levels of growth than others, yet overall there was a strong increase in the number of people living in the downtown. It is widely considered this growth reflects changing attitudes and lifestyles that people now desire 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.

Many interviewees from downtowns that had experienced more rapid levels of population growth described that their downtown almost reached a ‘tipping point.’ More specifically, their downtown had been experiencing slow but steady growth for many years, but once the population reached a critical mass it served to further accelerate population growth. It was considered by many interviewees that once a downtown is able to support a large format supermarket, this can make a major contribution to the attractiveness of the downtown as a place to live.

The downtown case study that has experienced the most rapid population growth in percentage terms is Victoria, with 83% growth between 1996 and 2006. This is closely followed by downtown Edmonton with an 82% growth rate during the same period. Other cities such as London saw its population grow by over one third (37% growth), and Toronto, Halifax and Ottawa saw an increase of around one fifth. Vancouver also experienced a 62% increase in its downtown population between 2001 and 2006.
The densest downtown is Vancouver at 176 people per hectare. This was followed by Toronto with 90 persons per hectare. London, Winnipeg, and Saskatoon also have similar population densities at 35, 38, and 39 persons per hectare. Despite having one of the highest rates of population growth, the population density in downtown Victoria is one of the lower population densities at 15 persons per hectare. When reviewing these figures it is also worth while looking at the size of the study areas that were selected for each downtown, some were significantly larger than others, which can impact density calculations.

<table>
<thead>
<tr>
<th></th>
<th>Edmonton</th>
<th>Saskatoon</th>
<th>London</th>
<th>Vancouver</th>
<th>Winnipeg</th>
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<tr>
<td><strong>Population Density</strong></td>
<td>21/ha</td>
<td>39/ha</td>
<td>35/ha</td>
<td>176/ha</td>
<td>38/ha</td>
</tr>
<tr>
<td>Halifax</td>
<td>Fredericton</td>
<td>Ottawa</td>
<td>Victoria</td>
<td>Toronto</td>
<td>45/ha</td>
</tr>
</tbody>
</table>

### Downtowns are accommodating young, educated populations in smaller households

The downtown case studies all had younger population profiles compared to citywide results on average. Downtowns also had consistently smaller household size and their residents usually had higher levels of education. In many cases, this is probably linked to the presence of post secondary institutions. Yet, this will be an important trend for city builders to understand as it could contribute to less diverse communities. For example, in CityPlace (in downtown Toronto), a “doorman survey” conducted by Councillor Adam Vaughan’s Office found only 128 children living in the nearly 5,000 units that have been completed.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 that are able to meet the needs of their populations for an entire life span.

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Downtowns are providing a growing number of dwellings but are challenged with housing diversity and affordability

While the downtown case studies have generally enjoyed many successes in attracting residential development, providing a range of unit types has been more difficult. Driven by high land costs and relatively tight sites, developments are marketed to young adults or older “empty nesters.” Condo units are typically priced per square foot, with the result that most buildings often offer only bachelor, one or two bedroom units. Family sized units – with three or more bedrooms and appropriate amenities – are rare. The City of Vancouver has made some strides here, pioneering designs for the provision of 2-3 bedroom units on the lower floors of residential buildings that look out over communal space where children can play. Yet these types of strategies will be increasingly important to consider in providing a wider range of housing in Canada’s downtowns in the future.

Downtowns have to overcome perceptions and concerns over lack of safety

The most prominent deterrent and misconception of downtown areas is the level of safety. Exodus from the downtowns in the post war period was in part attributed to a lack of safety. The suburbs were seen as cleaner and greener and more attractive to populations. All of the downtowns have been working hard on improving perceptions of crime and some struggles are fiercer than others. Yet one theme that clearly emerged is that the busier and more vibrant a downtown is, the less there are concerns over safety with people tending to feel more comfortable with larger crowds and a wide range of downtown users. More specifically, many downtowns reported that increased residential development helped increase that level of activity on the streets, which in turn contributed to downtown users feeling safer.

Downtowns are a blend of the old and new, they often contain the City’s key heritage assets

Given the downtowns are one of the oldest neighbourhoods in each of their respective cities they all have a rich collection of heritage buildings. For example, Victoria has 65% of the heritage sites in British Columbia and 240 buildings are concentrated in the downtown. Ottawa, Halifax, Fredericton, Winnipeg and London are also renowned for their historic cores. This concentration of heritage buildings provides significant and exciting redevelopment opportunities for a downtown. Yet it can also create challenges, as anti development sentiment can emerge in response to new developments proposed in historic areas. Moreover it can be costly to revitalize heritage properties. Downtown Halifax has made great strides in responding to both of these challenges through the HRMbyDesign planning process that achieved a more positive dialogue around new development

“Just look at all these ‘occupy protests’, they are all happening in Canada’s downtowns – that is because downtowns are always the place where these matters play out...downtowns are always the place where groups organize, where people go to be heard, where decisions are made and this has been going on for centuries.”

CUI Interview with Downtown Stakeholder

Heritage designated buildings in downtown Victoria can take advantage of financial assistance to support facade restoration, structural improvements, upgrading required by building codes, and other rehabilitation costs.

The 19th century wing of City Hall in Ottawa originally built in 1874.
with a focus on good design outcomes, as well as a more generous heritage incentive scheme.

**Downtowns are important places for public expression**
The downtown case studies were all important places for public expression. They tended to offer a central meeting place for all manner of regional events and cultural activities. Moreover, downtown streets are open to all and often the place where some of the community’s most significant social struggles play out (i.e. against homelessness, addiction, civil disobedience and even riots). This complicated range of activities and experiences are at play in downtowns every day and contribute to the core being one of the most important neighbourhoods for bringing people and ideas together.

**Downtowns are inherently mixed use and committed to increasing diversity of activity**
Downtowns are inherently mixed use neighbourhoods. While the downtown case studies are dominated by commercial development, they also accommodate substantial areas of institutional, retail, recreational and residential uses. The downtown case studies are each true mixed use communities, and provide an important model for development in other locations.

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. For example commercial parking lots are an area where there is some divergence. Most municipalities classify parking lots as a ‘transportation’ use, yet some classify it as ‘commercial’ use and others as ‘vacant.’ There is also some complexity when it comes to mixed use development. For example, residential buildings with retail at grade are classified in all manner of ways by their respective municipalities. To deal with this, the CUI team aimed to present data to show the predominant use at the parcel level. Therefore it is important to interpret this data cautiously and with the knowledge that it provides a great starting point for understanding the different components that make up each of the downtown case studies.

For example, this data provides a lot of insight into development opportunities that exist in each of the downtown case studies. The ‘transportation’ category generally provides an indication of the amount of surface parking lots in the downtown (with the exception of the Vancouver Waterfront Station and London Railway Station). When combining this proportion with ‘vacant’ land there is an even more accurate picture of how much developable land is in the core. For example in Winnipeg’s large downtown more than a quarter (27%) of the total land area is either ‘vacant’ land or ‘transportation’ land (primary surface parking lots), reflecting significant development opportunities. Downtown Victoria also has a large portion of ‘transportation’ land (19%), some of which is the large parking lots along the harbour front that offer tremendous opportunity for future redevelopment, while downtown Edmonton has 19% of its land utilized for ‘transportation’ or classified as ‘vacant’. Additionally, downtown London is rife with development opportunities as surface parking lots comprise around a fifth of its land area. The scarcity of land in downtown Vancouver is also reflected with limited vacant land and 6% classified as ‘transportation’ land, which is to a large extent taken up by the Waterfront Station.

The downtowns of capital cities also 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 is a slight exception to this pattern, due to its Legislature being just beyond the southern border of the downtown study area. 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 smaller area of the core (under 10% of land area). Edmonton and London have similar proportion at 15% and 16% respectively. While some of the downtowns only have a significant portion of residential development, such as downtown Vancouver with 29%. Downtown Fredericton also has a high level of residential land uses (24%), yet this largely reflects the lower density, historic dwellings that circle the downtown’s financial core. In most cases, municipalities receive a measure of compensation for this type of land use through receipt of ‘tax in lieu’ payments from federal or provincial governments.

<table>
<thead>
<tr>
<th>Land Uses* **</th>
<th>Winnipeg</th>
<th>Vancouver</th>
<th>Fredericton</th>
<th>Ottawa</th>
<th>London</th>
<th>Saskatoon</th>
<th>Halifax</th>
<th>Edmonton</th>
<th>Victoria</th>
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</thead>
<tbody>
<tr>
<td>Commercial</td>
<td>37%</td>
<td>49%</td>
<td>38%</td>
<td>28%</td>
<td>54%</td>
<td>82%</td>
<td>50%</td>
<td>45%</td>
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<tr>
<td>Industrial</td>
<td>8%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Institutional</td>
<td>16%</td>
<td>10%</td>
<td>30%</td>
<td>19%</td>
<td>11%</td>
<td>1%</td>
<td>18%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Residential</td>
<td>8%</td>
<td>29%</td>
<td>24%</td>
<td>7%</td>
<td>16%</td>
<td>3%</td>
<td>23%</td>
<td>15%</td>
<td>9%</td>
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<tr>
<td>Open Space</td>
<td>4%</td>
<td>6%</td>
<td>3%</td>
<td>32%</td>
<td>1%</td>
<td>11%</td>
<td>9%</td>
<td>12%</td>
<td>1%</td>
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<tr>
<td>Transportation</td>
<td>13%</td>
<td>6%</td>
<td>5%</td>
<td>3%</td>
<td>18%</td>
<td>1%</td>
<td>13%</td>
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</tr>
<tr>
<td>Vacant</td>
<td>14%</td>
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<td>9%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

*This data is based on land parcels only – not streets and roads.

** Every municipality collects land use data in different categories. To overcome this challenge, we have generally aimed to present data to show the predominant use at the parcel level. For example, in this study a residential building with retail at grade is classified as residential. While this presents some limitations, this data provides a good starting point for understanding the different components that make up each of the downtown case studies.
Downtowns are great places to encourage walkability and transit use

The downtown case studies tend to be the 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. The downtown case studies also tend to have a high level of amenities and a concentration of culture and activities. Perhaps, because they have places to walk to, downtown residents also have far higher rates of walking, cycling and utilizing transit, which will be important to moving people more seamlessly around the city in the future. Moreover, this accessibility makes the downtown an ideal location for the provision of essential public services and major investments in cultural or entertainment infrastructure, as well as the place to concentrate commerce and jobs to provide for maximum accessibility for all city residents.

Yet to fully leverage these benefits it is important that effort is placed on achieving these levels of walkability. Vancouver has gone to a lot of effort to improve its sidewalks and bicycle lanes, and has seen great results. Saskatoon has also upgraded its pedestrian realm. Toronto has taken a lot of positive initiatives with its highly functional PATH system and improvements to its sidewalks. However, one Toronto interviewee described the downtown as having a lot of ‘forced walking’ where downtown residents are walking because there is not enough capacity on transit; and many believe walking will be quicker than waiting for a transit vehicle to come along that has space for them.
**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.

A downtown that has generally made large scale investments is Winnipeg. These investments have increased confidence in the core, signalled by the return of the Winnipeg Jets and and high levels of commercial growth ($469.6M between 2005 and 2009). Yet one interviewee commented that while downtown Winnipeg received lots of large scale investments, these by themselves have not attracted the residential development that city builders hoped to see (approximately $159.2M between 2005 and 2010). 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.

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Downtown Toronto and downtown Vancouver are in a different position to the other case studies. 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. These two municipalities have not had to go to the same lengths to attract new growth to their downtowns. 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 depleting number of sites for office developments in the downtown. Moreover both cities are leveraging private funds from new developments rather than providing financial incentives to attract growth. Each have benefited from private investment in community facilities, public realm upgrades, parks, public art etc. This is an ideal scenario, yet it is still important that both municipalities continue to invest in their downtowns to strengthen these communities for years to come.

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.

**Investments that are designed to meet local needs have seen exciting transformations**

There are many similarities between each of the downtown case studies, yet what works well in one downtown cannot necessarily be transplanted to another. For example building the MTS Centre in downtown Winnipeg helped attract a National Hockey League team, but this is by no means a formula every downtown could rely on when building an arena. Therefore it is the downtowns that have collaboratively reviewed their aims, goals, limitations and resources, and designed their investment strategy accordingly, that have seen some of the most significant transformations. This approach also allows for a long view and an understanding of the interconnections between various investments that can help sustain momentum in the downtown over time. Similarly, the success of Ottawa’s and Fredericton’s recently opened Convention Centres and the prospect of one in Halifax are examples of strategic investment that will accrue long-term gains for their respective cities.

**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 that this investment has on their downtown. It would be even better if a City could start to gain an understanding of how much more beneficial one investment has been over another, or the way that various investments are able to support each other. This study provides a baseline to begin considering these important issues; however it is acknowledged that this study has faced many challenges in the collecting capital projects data for each of the downtown case studies.

More specifically the data underpinning the capital projects information presented in this study has several limitations. Firstly the data varies in terms of the years collected; the key reason for this is that capital projects are funded over many years, yet data is often collected as a single line item for the total amount spent on a project, which makes it difficult to separate out the period being studied. Secondly the types of investments collected vary, which again

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relates the issue of aggregated amounts being spent on projects, some downtown case studies have been able to separate out the downtown portion of major citywide investments other have not. In these instances there is a notation that data collected may not reflect every single investment that has occurred downtown over the past decade. Lastly there is variation in the methodology for data collection, which largely results from municipalities all collecting this data differently. Some of this data have been collected by a municipal representative filtering through a long list of capital projects from the past decade and selecting those which have occurred in the downtown; other lists have been compiled from scratch by a municipal representative connecting with various city departments and receiving input on their investments in the downtown; while a couple of the lists were compiled based on filtering city wide building permits to separate public and quasi public investments in the core. Overall, these limitations can create challenges for comparison and readers should apply some caution when comparing one downtown to another on the levels of municipal capital expenditure.

On a positive note however there are many similarities between the data collection process and data collected for downtown Halifax, Vancouver, Fredericton, Edmonton, Saskatoon, and London. Therefore there is some opportunity to cautiously compare the value of investments in these downtowns (keeping in mind the notations relating to each of the sets of data). Despite the potential limitations of the data, it does allow for a clearer understanding of the types of investments being made by municipalities and their revitalization priorities for the downtowns case studies.

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.
### Municipal Investments

**Mapped investments only**

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<tr>
<th></th>
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<tbody>
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<td><strong>Total</strong></td>
<td>$174,100,000</td>
<td>$136,686,000</td>
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### Portion of Municipal Investments

**by mapping category**

- **Arts and Entertainment**
- **Commercial and Conference Facilities**
- **Educational**
- **Parks and Open Space**
- **Community Facilities and Services**

### Top Two Investments in Downtown ($)

- **John Labatt Centre ~$52.8M**
  Investment in a multipurpose entertainment venue that hosts sporting events and concerts.
- **London Convention Centre ~$40.5M**
  Investment in a venue to hold conventions.
- **Shaw Conference Centre ~ $47.3M**
  Investment in a venue to hold conventions.
- **Louise McKinney Riverfront Park ~$36.7M**
  Investment in Downtown’s waterfront park.
- **River Landing ~$50M**
  Investment in an emerging mixed use community at the river front.
- **25 Street Redevelopment ~$21.5M**
  Investment in an emerging mixed use neighbourhood at the north end of the downtown.
### Downtown Fredericton

**Municipal Investments**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<td>Arts and Entertainment</td>
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<td>Civic Spaces and Streetscapes</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$84,097,550.00</strong></td>
</tr>
</tbody>
</table>

This data was compiled by the City of Fredericton based on a list of all capital expenditure between 2006-2010. There could also be some citywide projects that benefit the downtown that have not been captured in this data. Additionally, this data does not reflect individual grants, loans or incentives issued in the Downtown by the City of Fredericton.

### Downtown Vancouver

**Municipal Investments**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure, Utilities and Transportation</td>
<td>$26,600,000</td>
</tr>
<tr>
<td>Community Facilities and Services</td>
<td>$16,700,000</td>
</tr>
<tr>
<td>Educational</td>
<td>$400,000</td>
</tr>
<tr>
<td>Arts and Entertainment</td>
<td>$73,660,000</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>$29,500,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$148,860,000</strong></td>
</tr>
</tbody>
</table>

This data was compiled by the City of Vancouver, based on input from all city departments on their Downtown capital expenditure between 2002-2010. Generally, the Downtown portion of capital investments was able to be separated out of citywide investments for larger projects; yet it is possible there remains some citywide projects that benefit the Downtown that have not been captured in this data. Additionally, this data does not reflect individual grants, loans or incentives issued in the Downtown by the City of Vancouver.

### Downtown Halifax

**Municipal Investments**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civic Spaces and Streetscapes</td>
<td>$854,000</td>
</tr>
<tr>
<td>Community Facilities and Services</td>
<td>$2,000,000</td>
</tr>
<tr>
<td>Educational</td>
<td>$22,700,000</td>
</tr>
<tr>
<td>Commercial and Conference Facilities</td>
<td>$4,000,000</td>
</tr>
<tr>
<td>Infrastructure, Utilities and Transportation</td>
<td>$560,000</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>$3,903,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$34,017,000</strong></td>
</tr>
</tbody>
</table>

This data was compiled by Halifax Regional Municipality (HRM), based on input from all city departments on their Downtown capital expenditure between 2000-2014. It is possible there remains some citywide projects that benefit the Downtown that have not been captured in this data. Additionally, this data does not reflect individual grants, loans or incentives issued in Downtown by HRM.

### Top Two Investments in Downtown ($)

- **Provincial Office Building** ~$34M
  - Investment in a new office building that is being purchased by the provincial government
- **East End Project** ~$32M
  - Investment in a new convention centre and other supporting facilities in the east end of Downtown.

### Downtown Fredericton - Municipal Investments - 2006-2010

- **Queen Elizabeth Theatre (Renovations)** ~$60.7M
  - Investment in renovating a theatre to support the arts.
- **Emery Barnes Park - Phases 1-3** ~$27M
  - Investment in an urban park.
- **Central Library** ~$20.3M
  - Investment in a new Downtown library.
- **City Hall Stone Restoration** ~$3M
  - Investment in City Hall.
- Council has also committed $56M in funding for a Convention Centre that has been proposed in the heart of downtown Halifax.
DOWNTOWN CASE STUDIES