DOWNTOWN CALGARY
RETAIL CORE ENHANCEMENT STRATEGY

PREPARED FOR:

CALGARY DOWNTOWN ASSOCIATION

PREPARED BY:

HarrisConsulting

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EXECUTIVE SUMMARY

Calgary's retail core area – situated between 6th and 9th avenues from Centre Street S to 5th Street SW – represents the heart of retail activity in Calgary's downtown.

Currently, Calgary's core area enjoys an enviable market position, with significant retail vitality supported by a vibrant commercial core, a sizeable downtown population, and a number of high-quality arts, cultural, entertainment, and recreational attractions.

However, downtown Calgary's retail market share has, in recent years, been slowly eroding. While downtown Calgary is still a place to work and a place to visit, continued retail and residential development in outlying suburban locations have led to steady erosion of the importance of the downtown core as the city's principal shopping destination.

Looking primarily at the retail core area (but also dealing with specific linkages between the retail core and the rest of the downtown), this document considers characteristics of other successful downtown retail areas, as well as identifies specific challenges facing Calgary's downtown retail core. Based on this overview, a number of strategies that support greater retail vitality in Calgary's downtown core will be presented that support the preservation of the central area as a vibrant, active and attractive focal point to the City of Calgary. These strategies include:

- *Defining the retail core through improvements in the area's urban design and upgrades to the public realm*. This includes enhanced urban design guidelines and improved signage and wayfinding; all to create a visual and tangible feeling of place within the retail core.
- *Improving access within the retail core*. This includes re-introducing general-purpose traffic moving in both directions on Stephen Avenue and some streets elsewhere in the downtown, and expanding the Plus 15 system to better integrate it with the street. It also includes enhanced legibility of the retail core area.
- *Improving street front retail offerings in the core*. This strategy calls for integrating retail uses into transit stations while placing more active retail uses at grade level. This also calls for new private investment in retail building façades to provide a more attractive "face" to the retail core.
- *Revitalizing Devonian Gardens.* A revitalized Devonian Gardens offers significant potential for downtown enhancement by drawing increased numbers of people into the retail core area. This revitalization could include either the major renovation of the existing facility now being

proposed, or an expanded process that explores the feasibility of moving the Devonian Gardens to another site within the downtown core.

- *Expanding the availability and visibility of special "twoonie" weekend parking in the downtown.* The abundance of free parking at suburban shopping centres represents a distinct competitive advantage for those centres. By increasing the amount of discounted, convenient parking in the central core and improving the wayfinding system to allow easier navigation between parking and shopping areas, a significant barrier for downtown visitors would be eliminated.
- *Improving the perception of safety in the retail core area.* The introduction of "Downtown Ambassadors" into the retail core will improve visitors perceived level of safety while also providing assistance and local information to downtown visitors.
- *Expanding the downtown housing market.* Greater numbers of local residents will provide a larger pool of regular shoppers within the downtown core, supporting general merchandise and luxury goods retailers, as well as a variety of service commercial uses.
- *Expanding tourist, arts and cultural, recreational, and entertainment offerings in the downtown core, while also improving linkages between these types of uses.* Recreational, arts and cultural uses in the downtown core provide support for retail activity by generating a steady flow of activity within the central area during both day and evening hours.
- *Supporting expanded educational uses in the downtown core.* These types of uses aid in diversifying the pattern of use within the core and support local retail vitality.

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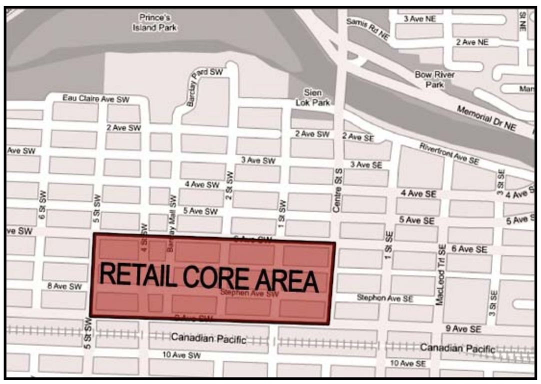
INTRODUCTION

Harris Consulting Inc. was retained by Calgary Downtown Association (CDA) and the City of Calgary in late 2004 to prepare a Retail Core Enhancement Strategy for Calgary's central downtown area.

The Calgary Downtown Association (www.downtowncalgary.com) is a non-profit organization representing about 3,500 businesses within Calgary's downtown area. The mission of the CDA focuses on enhancing Downtown Calgary's vitality by increasing the diversity and density of attractions, activities, housing, and employment opportunities.



The retail core area – situated between 6th and 9th avenues from Centre Street S to 5th Street SW – is the heart of retail activity in Calgary's downtown. While currently in a strong market position relative to other Canadian retail areas, Calgary's downtown is in the midst of a number of structural and competitive challenges. The outcome of this strategy will be a better understanding of the downtown's competitive edge and positioning within Calgary's highly competitive retail environment, while also advancing strategies that strengthen downtown's unique identity and role or "niche" within the local market.

In developing this retail core enhancement strategy, Harris Consulting Inc. worked with the CDA to meet with and interview key property owners and managers and public agency representatives in the retail core. A workshop with a group of these public and private sector stakeholders was held on January 11th to test assumptions about retail activity in the core area and to identify strategic choices to enhance downtown Calgary's retail vitality.

The Calgary Downtown Association commissioned this Retail Core Enhancement Strategy in order to support and contribute to the creation of a more vibrant downtown. A number of public and private sector initiatives either underway or under construction have the scope to bring about significant change in the retail core. These include major upgrades and changes to the C-Train stations along 7th Avenue, reinvestment in the Devonian Gardens, renovations to TD Square and Scotia Square, and other improvements including potential extensions to the existing Plus 15 pedestrian links in the downtown.

This Retail Core Enhancement Strategy looks at these initiatives and others throughout downtown Calgary in order to provide recommendations designed to ensure that the vision of a more vibrant downtown centre can be achieved.

This study was completed by Gordon Harris, MCIP and Jonathan Tinney of Harris Consulting Inc. (www.harrisconsults.com), under the direction of Lynne Dale of the Calgary Downtown Association. Information sources include the Calgary Downtown Association, the City of Calgary, and Harris Consulting's own files. Photos by Andrew Forsyth (www.stuartappleby.ca), the Downtown Calgary Association, and Corbis (www.corbis.com).

DOWNTOWN TRENDS

Over the past two decades, Canadian metropolitan downtown areas have gone through a significant process of restructuring. Largely due to increasing residential and retail development in suburban areas, downtown retail districts within the majority of North American cities have shown significant retail sales declines over the past decade. A 2002 study by the Brookings Institution indicated an average decline of 26 percent in downtown retail spending across the 25 largest US metropolitan regions between 1990 and 2000. The Canadian experience has been somewhat less pronounced, Statistics Canada data shows, on average, a 16 percent decline in retail sales within Canada's 10 largest metropolitan areas between 1990 and 1998.

A number of major metropolitan areas saw significant declines over the period. For example, Edmonton's downtown retail sales declined by almost fifty percent, Winnipeg and Ottawa witnessed losses of more than 40 percent, and Hamilton's downtown retail sales were reduced by one-third. Declines observed in Calgary downtown core were somewhat less pronounced totaling approximately nine percent over the period.

More recent data suggests a slight recovery, with sales in Canada's metropolitan downtowns increasing by 4.5 percent between 1999 and 2001. However, downtown sales growth was still a percentage point less than total retail sales growth and subject to substantial variability.

In recent years Calgary's downtown core has seen some recovery in retail spending with growth just slightly below the national average (4.4 percent over the period, however, anecdotal evidence suggests that this may have increased in the intervening period) resulting from a dramatic increase in downtown employment from the lows observed during the mid-1980s; Quebec City's downtown has shown a significant tourism-fuelled recovery with sales growth of 15 percent between 1999 and 2001; and Toronto has seen strong core area retail sales growth (5.3 percent between 1991 and 2001) based on an increase in inner-city residential growth. At the same time, centres such as Winnipeg, Hamilton, and Ottawa have continued to see significant declines (-10.4 percent, -2.4 percent and -2.2 percent respectively).

While many downtowns are once again exhibiting increases in total retail sales, all of the nation's downtowns have consistently posted declining retail spending market shares when compared to local suburban shopping centres. For example, in 1989, an average of 10.1 of retail spending within Canada's 10 largest metropolitan regions occurred in the downtown core. By 1999 this had declined to an average of 6.8 percent.

What is apparent from this data is that Canada's downtown retail areas continue to struggle to redefine themselves within a changing metropolitan retail landscape. No longer are downtown areas the primary shopping destination for residents of a given urban region. Retail forms prevalent in downtown areas such as the department store are losing market share and quickly being supplanted by numerous auto-oriented, large-format power centres that can be easily accessed by local consumers – the majority of whom increasingly live and work in suburban areas closer to regional shopping centres than to the downtown core.

CALGARY'S DOWNTOWN TODAY

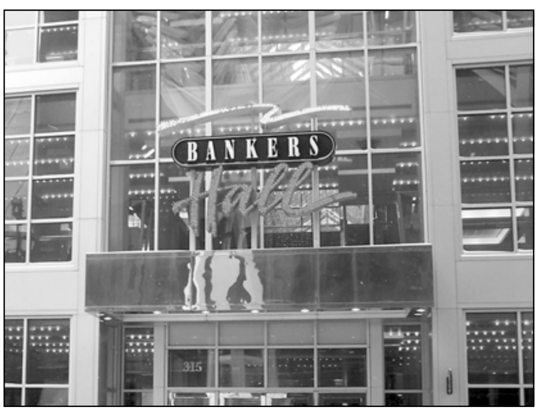
The retail core area is just one part of a downtown that extends north from the CPR mainline to the Bow River, from 4th Street SE west to 11th Street SW. Calgary's downtown retail core is centrally located just south of the Central Business District and just west of the City's hotel and convention area. The greatest concentration of the downtown's retail activity is within an area between 6th and 9th avenues, bounded by 5th Street SW to the west, Centre Street S to the east. Within the downtown core are 32 million square feet of office space and over four million square feet of retail floor space. Approximately 120,000 people work in downtown Calgary and another 15,000 plus people live in this area.

Each day approximately 560,000 people travel through the downtown core. Of these, approximately 410,000 travel by car, 136,000 enter and leave via the City's C-Train light rail transit system, and a further 17,000 travel to and from downtown on one of Calgary Transit's 36 bus routes serving the central area.

CALGARY RETAIL SPENDING: DOWNTOWN VS. SUBURBS 1999-2001				
	1999	2001	Difference	% Change
Total CMA	$10,115,092,000	$12,159,970,000	$2,044,878,000	20.2%
Downtown	$588,811,000	$614,944,000	$26,132,000	4.4%
Suburban	$9,526,281,000	$11,545,026,000	$2,018,746,000	21.2%
Downtown Share	5.82%	5.06%	-0.76%	

Calgary, like most Canadian cities, has experienced a shift in retail activity over the past several decades. As stated previously, suburban expansion has fed the development of a number of sizeable suburban shopping centres, large-format retail power centres, and other emerging retail concentrations that compete directly with the downtown retail core.

The result during the 1999 to 2001 period was an overall decline in the downtown's share of total retail spending. Strong suburban sales growth (21.2 percent over the same period) has continued to erode downtown's share of the overall Calgary retail market. Over that three year period, downtown Calgary's market share of total retail sales decreased by three-quarters of one percent.



However, Calgary's retail core is in a strong relative position. While many Canadian cities have experienced overall declines in total sales in their downtown shopping districts, Calgary has seen significant growth (4.4 percent between 1999 and 2001) in the total amount of retail spending in the core area. This is due to a number of factors. As a single municipal entity, Calgary has escaped competition from adjoining municipalities for large retail concentrations on the City's fringe. Secondly, long-range planning has ensured that Calgary's growth in new retail space is in scale with new suburban development. Thirdly, and perhaps most importantly, Calgary's downtown has emerged as a strong destination not just for retail stores but also for a sizeable downtown employment base, and for the city's arts, culture, entertainment, civic, and recreational attractions. The many non-retail activities that draw residents and visitors into the downtown core provide a significant customer base for businesses within the retail area.

Public investment and reinvestment in the public realm is ongoing in the downtown core and downtown Calgary has a vibrant and growing arts/culture /entertainment district. The University of Calgary is looking to establish an urban campus in the downtown's East Village, and a broader mix of land uses in the downtown – including more residential uses – are currently being considered as part of the creation of the City of Calgary's *Downtown Urban Structure Plan*.

Overall, downtown Calgary's future outlook is positive. However, continued vitality in the retail area faces a number of significant challenges, as evidenced by the core's slowly eroding market share. Going forward, plans and policies should work to grow and enhance downtown Calgary as a retail area, ensuring it remains a vital and vibrant centre for the City of Calgary well into the future.

DOWNTOWN SUCCESS FACTORS

Increasingly, the revitalization of urban downtowns (and their corresponding retail cores) have become a significant focus for urban decision-makers. An analysis of the factors influencing the success or failure of retail core areas across the country represents a distinct set of lessons learned that may be applicable to cities across the country. As part of the development of this strategy, HCI undertook a comprehensive analysis of successful retail core areas in Canada highlighting the specific factors that led to their success.

Consistent with the currently conventional wisdom, HCI found that a mixture of uses in the central core beyond just office commercial and retail uses is vital to the creation and maintenance of a viable and vibrant downtown. Many cities have had great success in revitalizing downtown retail districts by significantly increasing residential development, at the same time as promoting entertainment (bars, pubs, cinemas, etc.) and arts/cultural uses in close proximity to their commercial and retail cores.

At the same time, increasing demand for continuing education services and executive training programs has led to an increased presence in the downtown of local post-secondary educational institutions. In an attempt to offer programs that can be easily accessed by working individuals, universities and community colleges have begun to open downtown campus facilities, adding vitality to downtown areas during non-work hours. Examples include Grant MacEwan Community College in downtown Edmonton; BCIT, SFU and UBC in downtown Vancouver; and the University of Manitoba in Winnipeg.

Many city governments and downtown land owners have begun to acknowledge that the creation of attractive public spaces and pedestrian environments within the downtown core can lead to increased vitality and vibrancy. In recent years, a number of cities have begun to see improvements in urban retail districts due to investments made to enhance urban design elements, create new public spaces, and aid local businesses as they upgrade their properties, all in an attempt to create a more attractive and inviting public realm.

Changes have also been observed in the way downtown areas are dealing with vehicle access and movement. A number of cities have begun to examine the success of their one-way street patterns, as well as their downtown transit and pedestrian-only malls. Many are acknowledging that full, two-way vehicle access can add vitality and easier perceived access to core areas.

Overall, an examination of the trends observed in other Canadian downtowns highlights a number of factors that contribute to the strength and vibrancy of core area retail in metropolitan areas. These "success" factors include:

LARGE CORE AREA POPULATION

Cities such as Vancouver, Toronto and Montreal have large and growing residential populations living in and immediately adjacent to their downtown core areas. This provides local retailers with a built-in base of customers who support not only area comparison shopping opportunities but also a number of local-serving retail and service amenities.

EXTENDED ACTIVITY

Successful downtowns have active areas or "hot spots" throughout the day and evening, not just during working hours. Arts, entertainment, employment, civic, and residential uses, in combination, make the downtown core of cities more vibrant, and support a more diverse and active retail and service base.

EDUCATIONAL USES

Many Canadian cities have taken advantage of new university and other post-secondary education institutions in the downtown core areas, as a catalyst to increase local retail activity. Cities such as Edmonton, Vancouver, and Winnipeg have all seen development of downtown extension's to local university and community college campuses which have helped to bring about revitalization of the local area. These institutions bring students, faculty, and staff to the heart of a city, stimulate retail spending, housing demand, support for entertainment and arts and culture venues, and generally add life and vitality throughout the day and into the evening, seven days a week.

AN EMPHASIS ON THE PUBLIC REALM

Successful downtowns emphasize the retail core and foster investment and reinvestment in the public realm. Examples include the significant reinvestment in the Yonge Street façade of Toronto Eaton Centre to provide transparency, street-level interest, and to open up this large enclosed shopping mall to the street. This coupled with a program to promote retail storefront renovation, and the creation of a new programmed public space at Yonge-Dundas Square, have helped revitalize what was once a rundown section of Toronto's retail core.

A HIGH LEVEL OF PEDESTRIAN AND VEHICLE ACCESS

Successful downtowns are easily accessible from the rest of the city and allow for easy movement within the downtown area, especially by automobile. This contributes to greater street activity and ensures ready access by occasional visitors. Great streets such as Robson Street in Vancouver, Queen Street in Toronto, and Ste. Catherine Street in Montreal are streets shared by private cars, pedestrians, and transit. Conversely, those streets that remove cars such as Vancouver's Granville Street Mall, Ottawa's Sparks Street, and Montreal's Rue Prince Arthur all experience lower sales and greater concerns about a street culture that includes drug use, panhandling, and related problems than other nearby retail areas.

DOWNTOWN CALGARY'S CHALLENGES

Downtown Calgary shares many of the features and qualities of other successful downtowns. However, it does face some significant challenges.

CRITICAL MASS AND SCALE

While downtown Calgary has a relatively large inventory of retail floor space, it is spread across a large geographic area. The retail core is dominated by four enclosed shopping centres of various scales: the three largest, Eaton Centre, TD Square and Banker's Hall comprise approximately 580,000 square feet of retail space, while Scotia Plaza adds another 75,000 square feet of mostly underutilized floor space. These centres are anchored by two multi-level department stores operated by the Bay and Sears which combine to add an additional 600,000 square feet of retail floor space to the retail core area. Downtown Calgary also has an estimated 150,000 square feet of other shops and services spread across 12-15 block faces. This retail space is at grade, on the Plus 15 level, and on the Plus 30 level. Overall, the retail core offers slightly less than 1.3 million square feet of retail floor space. While this is significant, for visitors and shoppers this retail core does not read as a single, cohesive retail destination with coordinated hours of operation and marketing (as, for example major retail malls such as Chinook Centre or Market Mall do). A number of Calgary's regional shopping centres can offer similar critical mass and are of a scale and design that better facilitates comparison shopping. For example Chinook Centre offers 1.2 million sq. ft, Southcentre and Market malls each offer one million square feet and the proposed Deerfoot Meadows in southwest Calgary will soon offer more than 1.4 million square feet of floor space.

An average of 500,000 people frequent core area shopping malls in a given week, the majority of this traffic is generated by downtown's large captive market of office workers. However, the larger suburban malls generate similar traffic volumes, with greater numbers of shoppers during evenings and weekends when consumers are more likely to engage in higher volume comparison shopping and spending. For retailers looking to enter the Calgary market, especially larger destination retailers, suburban locations offer more attractive location options. Through suburban shopping centre locations, these destination retailers can reach a larger number of shoppers, spread over a longer trading day, more days of the week, and with the added advantage of free parking and overall larger and more varied mix of retail stores and services.

RESIDENTIAL POPULATION

While Calgary's downtown area has an estimated population of 15,000 people, the downtown housing is, for the most part, situated at the westerly and northern edges of downtown. Therefore, for most downtown residents the retail core is not centrally or conveniently located. Other, smaller, concentrations of shops and services in the downtown such as those found on 8th Street SW tend to meet the day to day needs of these residents and therefore the retail core derives little benefit.

ACCESS

Specialized streets such as the Stephen Avenue and Barclay Street malls, the 7th Avenue transit mall, and downtown's numerous one-way streets create both opportunities and challenges for the retail core area. While respectively, these rights-of-way may offer an attractive and inviting pedestrian environment, a centralized transit hub within the downtown area, and more efficient vehicle throughput, they also create real and perceived impediments for those trying to access downtown's shopping district.

As attractive as it is for much of the day, Stephen Avenue is inaccessible by private automobile traffic, creating a barrier for many who might otherwise visit shops and services in the retail core. Similarly, the 7th Avenue LRT right-of-way cuts through the centre of the retail core limiting vehicular access to downtown shops and services, while the numerous one-way streets in Calgary's downtown further exacerbate problems of convenient access to the retail core.

LEGIBILITY

A further – and associated – challenge relates to the "legibility" of the retail core. There is currently little to signal visitors that they have arrived in – or are approaching – the retail core. Calgary's downtown core currently has no specific set of building treatments, urban design elements, or entry features that mark the edges and interior spaces of its downtown shopping district. In order to be more successful the retail core must be more easily "read" as a destination within Calgary's downtown.

PARKING

According to a 2004 market research study commissioned by the Calgary Downtown Association, the second most often cited challenge deterring Calgarians from visiting the downtown core was parking (only traffic congestion was cited by more respondents). More than a quarter (26 percent) of those polled suggested that parking availability and cost were the primary reason they do not visit the downtown.

Further, for those who do come downtown, signage and directions to and from parking areas to the retail core are often not posted or are not easily visible to infrequent visitors. If downtown is going to compete with suburban shopping areas, parking must not only be plentiful and close to retail uses, but it must appear to be that way as well. This can most easily occur through the use of adequate signage and wayfinding systems that direct visitors between parking areas and shopping districts.

SAFETY

Downtown Calgary, like many other metropolitan downtowns in Canada, is seeing increasing numbers of homeless and indigent residents panhandling and taking shelter in public spaces within the downtown core. Statistics compiled by the Calgary Downtown Association report a one year increase in the number of individuals panhandling in the downtown of 59 percent (from 357 to 569). While the number of incidents of violence or property crime committed by the homeless in downtown areas is quite low, large numbers of visibly poor individuals in an area can create the perception of danger for many visitors. Almost one-fifth (19 percent) of respondents in the Calgary Downtown Association's perception survey suggested that homelessness, panhandlers and street people were the most significant challenge facing the downtown core.

Crime does occur in the downtown core, and preliminary data show that the increase in the incidents of violent crime in the downtown was three times that observed in the city as a whole, while the increase in property crimes observed was more than four times that observed city wide.

RECOMMENDED STRATEGIES AND DIRECTIONS

Districting and Marketing

Downtown Calgary includes over 70 square blocks and stretches over a large geographic area. Retail consumers typically will not walk more than about 1,200 to 1,500 feet, even in an interesting, fully activated shopping area. In Calgary, this typical walking distance translates into a maximum of three to four city blocks. Because of this 'behavioural distance', downtown Calgary should be considered as a series of different sub-areas each catering to a different type of use and set of activities. Currently however, districts within the downtown core are nominal and the identity of each is sometimes difficult to decipher.

The retail district specifically is characterized by a mixture of businesses, building forms (low-rise street-front retail spaces, enclosed malls, office tower complexes, etc.), street fixtures, and urban design elements that fail to define a distinctive retail core out of the broader central business district.

Urban design guidelines developed by the Downtown Calgary Association are not likely to remedy this condition as they amalgamate the business core, the convention/hotel district and the retail core area into one harmonized neighbourhood stretching from 3rd Avenue in the north, south to the CPR right-of-way, and east from 3rd Street to 9th Street in the west. It may be more appropriate for urban design standards to define the retail core area separately from business and hotel areas. This would work toward defining the retail core as a distinct area within downtown Calgary.

The Calgary Downtown Association has recently been carrying out a coordinated marketing program aimed at promoting the retail core. This program could be expanded to better define this district as a distinct area within the broader downtown area. Expansion of this type might encourage harmonized hours of operation, common advertising and a series of cross-marketing campaigns between downtown retailers, thereby synchronizing the drawing power of individual businesses.

There has been some suggestion that this type of program might aid in attracting high-volume, destination retailers to the downtown, which would anchor the core and draw greater number of shoppers. However, research conducted by Dr. Kent Robertson at the Massachusetts Institute of Technology in the Spring 2004 issue of the Journal of Architectural and Planning Research indicates that these types of programs are not at all effective in attracting key retailers. In a longitudinal study of downtown revitalization efforts across the US, Dr. Robertson's research found that recruitment activities were the least successful measure surveyed in terms of its effectiveness in furthering retail area enhancement goals. Therefore, HCI does not recommend giving a high priority to a retail recruitment program at this time.

RECOMMENDATIONS:

- Define a retail sub-area within the Downtown Urban Design Guidelines. This sub area should extend from 4th Street east to 1st Street and from 6th Avenue south to 9th Avenue.
- Develop a distinct set of urban design/public realm guidelines for the retail core area that defines it as a distinct area within the central business district. This should include the creation of entrance features, urban design elements (seating, pedestrian realm etc.) and guidelines for the form and character of new developments in the area.
- Co-ordinate with Calgary Transit to amend the 7th Avenue Transit Mall redevelopment plan to highlight the retail core.
- Develop a corridor plan to strengthen connections between downtown districts allowing for easy wayfinding between core area attractions.

- Expand the existing marketing and promotion campaign by focusing efforts toward defining the retail core area as a single destination in the minds of local consumers.

One-Way Street Network

Currently, the majority of streets within the retail core area allow traffic to travel in one direction only. 1st, 2nd, 3rd and 4th streets, as well as 4th, 5th, 8th (when traffic is allowed) and 9th avenues are all one way streets. One way street networks are useful when a street's sole mission is to move traffic into and out of the downtown employment centre as quickly as possible. Therefore, one-way streets offer significant convenience to commuters and regular visitors to the downtown, especially since these motorists have learned the downtown network and know the "best route" to their destination.

However, infrequent visitors to the downtown are easily confused and disoriented by the city's one-way street network. Often, these motorists are able to see their destination but are shunted away from it by the one-way streets. The creation of active retail streets is further hampered by the speed and volume of traffic facilitated by the one-way street network.

Recent academic research carried out by Dr. G. Wade Walker et. al. for the Transportation Research Board (gulliver.trb.org/publications/circulars/ec019/Ec019_f2.pdf) indicates that one-way street networks increase the number of turns required to reach a given destination by an average of 160 percent, increase average vehicle speeds by 16 percent, and decrease retail visibility to local motorists by 25 percent. This research also cites seven cities across North America (including Berkeley, CA; Edmonton, AB; Toledo, OH; and Albuquerque, NM) who have opened significant portions of their one-way street networks to two-way traffic since 1997. The reasons cited for these conversions included improvements to the pedestrian environment, enhancement of retail activity, and easier accommodation of transit.

RECOMMENDATIONS:

- Examine the effect on peak hour travel times and congestion of conversion of all or part of the one-way street network to two-way traffic.
- Priority should be given to returning two-way traffic to the north-south streets within the retail core (2nd, 3rd and 4th streets), as well as on 5th Avenue.

Stephen Avenue Pedestrian Mall

Stephen Avenue Mall, like many of the pedestrian-oriented shopping districts created in North American cities in the 1970s and 80s, separates vehicle and pedestrian traffic along a linear retail strip in an attempt to create an attractive environment for local shoppers. However, declining activity and retail vitality on the street has recently prompted a decision to allow vehicle access during the evening and nighttime hours.

Calgary is not alone in its decision to re-open its pedestrian shopping area to limited vehicle use. Cities across North America have begun to question the benefit of pedestrian-only retail corridors within their downtown cores. There is an emerging awareness that regulated traffic flow on adequately sized streets adds to rather than detracts from the retail experience. Santa Monica's Third Street Promenade, Tampa's Franklin Street Mall, Tulsa's Main Mall, Eugene's Broadway Mall, and Fresno's Fulton St. have all recently reintroduced vehicle traffic in attempts to improve retail vitality. Access to vehicles removes real and perceived barriers for those considering a trip downtown, increases visibility to local businesses, provides added safety to those using the area at night, and helps to add an overall sense of activity to the street.

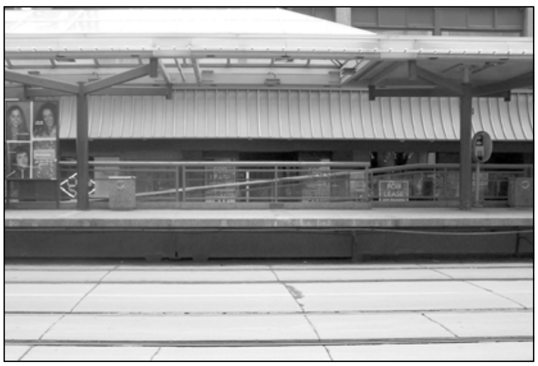
Currently, activity on Stephen Avenue, as in much of the downtown, occurs mainly during the late morning and early afternoon period of the work week. This is a pattern observed in other pedestrian-only zones such as Rue Prince Arthur in Montreal and Sparks Street in Ottawa. Visitor traffic is limited to daytime hours as it is dependent largely on tourists and local workers. Contrast this to streets where traffic is permitted but still controlled such as Yorkville and Cumberland streets, or the Kensington Market areas of Toronto; or Hamilton and Mainland streets in Vancouver's Yaletown district. Much like in the examples cited above, Stephen Avenue would benefit from the improved access brought about by consistent vehicle access. A consistent and controlled flow of private vehicle traffic throughout the day would maintain attractive pedestrian zones, while enhancing retail vitality by making the many restaurants and pubs along Stephen Avenue generally more accessible to visitors.

RECOMMENDATIONS:

- Explore options for allowing permanent vehicle access to Stephen Avenue.

7th Avenue Transit Mall

Seventh Avenue is centrally located and is the primary conduit for east-west transit service in the downtown, accommodating approximately 500 trains and more than 400 city buses each day. The stations are heavily used and are rapidly reaching the end of their useful life with respect to their functionality, appearance, and ability to absorb further ridership growth. Given the volume of traffic it sees, 7th Avenue is one of the best known streets in Calgary, however its current state of disrepair, and limited street front retail space, impede opportunities created by the high volumes of transit riders who use the street.



Retail uses on the street are limited. Floor space is insufficient and tends to be filled by small, marginal retailers such as pawn shops, used furniture stores or small independent food service establishments. The majority of the street front is dominated by uninviting commercial plazas and underutilized stretches featuring bare walls or curtained windows. Despite the fact that a number of the downtown's shopping centres open onto 7th Avenue, these entranceways are unengaging and add little visual or human activity to the street.

Currently, 7th Avenue is in the midst of a significant redevelopment plan undertaken by the City of Calgary and Calgary Transit. This presents a number of opportunities for invigorating Calgary's retail core. A revitalized public realm and expanded retail uses that benefit from this corridor's high traffic volumes would begin to reintegrate 7th Avenue as a part of the city's downtown retail core.

RECOMMENDATIONS:

- Work with Calgary Transit and the City to create a distinct retail core sub-region within the 7th Avenue revitalization process. This would include an enhanced streetscape and urban design elements that make the retail core visually distinct from the balance of the 7th Avenue transit corridor.

- Incorporate retail opportunities into the 7th Avenue Revitalization plan. This would include permanent or semi-permanent retail spaces integrated into transit stations. These spaces would be appropriate for businesses such as news vendors, convenience retailers, small-scale food service operators, etc.
- Linkages between transit stations and major retailers should be strengthened.

The Plus 15 Walkway System

From its inception in 1970, Calgary's Plus 15 elevated walkway system has expanded to become the largest system of its kind in the world. Sixteen kilometres of walkway, and 57 bridges at the 15, 30, and 45 foot levels extend to cover the majority of Calgary's downtown core. The system is provided as a part of commercial development that takes place in the downtown. New developments are required to connect into the system by providing walkways and bridges that connect the development to neighbouring ones. Given the size of this system and the rate of development expected in Calgary's downtown core, the Plus 15 system has the potential to significantly affect retail viability in the downtown core.

The system's convenience and popularity, especially in colder months, work to remove pedestrian traffic from the street level and direct into the enclosed retail spaces within the downtown core. This has the effect of decreasing traffic for storefront retail outlets, while increasing traffic to downtown's enclosed malls. There has been some recent discussion regarding the addition of retail offerings to the corridors of the Plus 15 system. This is likely to further remove traffic from the street and the area's enclosed shopping centres, leading to a greater dispersion of retail spending in the downtown core.

Expansion of the Plus 15 system is recommended as this is likely to increase traffic levels bringing more of the downtown's many office workers to the retail core. However, as the system expands, design improvements to the bridge and pathway system should be explored that allow for better visibility and access to and from street front retail areas. This will aid in better integrating the interior and exterior retail offerings within the core area. Coupled with an upgraded wayfinding system that highlights access and egress points as well as local retail attractions, these improvements will help downtown shoppers move more easily between shopping destinations.

RECOMMENDATIONS:

- Support the continued expansion of the Plus 15 system.
- Carefully assess any proposed additions of retail space within the Plus 15 system to ensure that it does not negatively impact street-level or exiting Plus 15 retail activities.
- Work with the City to improve visibility from Plus 15 to the street.
- Work with the City to improve street access from Plus 15 to the street.
- Support the upgrading of the downtown-wide wayfinding system.

Retail Space Street Façades

In some areas, the built fabric and form of Calgary's downtown presents a number of challenges that impede the creation of a vibrant retail district.

Streets and buildings are often disconnected as there are few doorways, and street walls often are made up of featureless concrete or darkened glass. Many building façades feature colonnades between the sidewalk and the street which act to "privatize" the sidewalk and separate the pedestrian from adjacent buildings.

Further, many buildings in the retail core do not feature retail uses at grade level. Many buildings contain banks or large commercial office lobby and reception areas on their main floors. This form of building and at-grade use is not conducive to the creation an attractive pedestrian realm or to an active retail district.

While research carried out by Dr. Kerry Vandel and Jonathan Lane at the Harvard School of Design (Aruea Journal) suggests that building façade and urban design improvements within a retailing area can improve retail sales on average, by as much as 20 percent, and decrease vacancy rates by an average of 12 percent, in order for landowners to make the substantial new major capital investments needed to improve street façades in the downtown, they must be able to demonstrate a direct financial return on the investment. To do so, any capital improvement would need to result in an increase in rental income or at least protect existing cash flow (preventing retail tenants from moving to another shopping area for instance).

One way for Oxford Properties, the single-largest land owner/manager of retail space in downtown Calgary and owner/manager of Calgary Eaton Centre/ TD Square/Scotia Centre, to achieve a reasonable financial return that could then support retail street front façade improvements would be to increase the gross leasable retail floor space within their premises. This could be achieved by moving some of the larger non-retail-related activities within Oxford's properties such as, activities associated with Scotiabank and other financial institutions, from prime main floor and Plus 15 locations into upper level office spaces.

Further, additional incentives could be offered to landowners through a dedicated streetscape enhancement program. This refers to a set of city policies that would see the municipality forgoing the collection of some portion of properties municipal tax for a set period of time in order to support streetscape enhancing renovations. It could also refer to a Business Revitalization Zone program which provides lower cost financing to fund necessary upgrades that are then paid back over a maximum period of 15 years. Both of these forms of public reinvestment were employed in the exterior renovation of both the Toronto and Edmonton Downtown Eaton Centre developments, and may be useful as a means to encourage public realm upgrades in downtown Calgary.

RECOMMENDATIONS:

- Encourage Oxford Properties to expand grade-level retail in its downtown properties through the movement of financial services and other non-retail uses currently at grade level to other less visible floor space.
- Work with the City of Calgary to assess the feasibility of creating a streetscape enhancement initiative to fund exterior upgrades to private commercial properties in the downtown retail core.

Devonian Gardens

The Devonian Gardens occupy approximately 110,000 square feet of the TD Centre at the heart of the retail core area. The gardens attract more than 700,000 visitors each year, and represent a major draw within the downtown core. However, the gardens themselves are not as prominent or visible as they could be due to their location on the upper floor of a shopping mall/commercial complex. As well, there has been little reinvestment in the Devonian Gardens since they were opened in 1977 and after 28 years, the gardens' facilities now need significant upgrades.

Currently, the City of Calgary is in the midst of creating a plan that would see a major reinvestment in the gardens over the next several years. While no attendance projections have yet been created, city staff anticipate that the revitalization holds significant potential to increase the number of visitors to Devonian Gardens, and by extension the retail core area.

Despite this, there is some indication that the utilization of such a large space by the gardens within the centre of the downtown's retail core could represent a lost opportunity for more retail space – thereby increasing the critical mass of retail uses in the core area. This suggests that there may be some potential in moving Devonian Gardens to another site within the downtown core. This strategy would see the downtown core retain the draw provided by Devonian Gardens, while allowing for the creation of a signature structure that highlights Devonian as a significant city landmark. This would also free up a significant amount of floor space for expanded retail uses. This strategy could be used to offer some incentive to Oxford Properties to upgrade its facilities and enhance the exterior streetscape surrounding their downtown properties.

While the costs and benefits of this strategy are not currently known, given that the City of Calgary is already looking at changes and upgrades to the Devonian facilities, there may be some potential in expanding the current revitalization assessment to also examine the feasibility of moving the gardens to another location within the downtown.

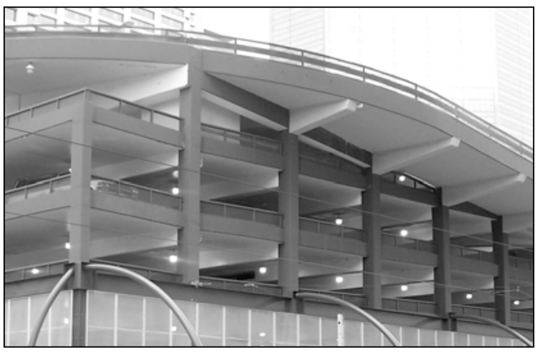
RECOMMENDATIONS:

- Support the City of Calgary in its Devonian Gardens revitalization process. This revitalization could include either the major renovation of the existing facility now being proposed, or an expanded process that explores the feasibility of moving the Devonian Gardens to another site within the downtown core.

Parking

The downtown core contains approximately 56,000 parking spaces. Spaces are discounted during the weekend, and approximately 3,000 of these spaces are available at discounted rates during the weekend. While this is a valuable program, it currently provides only a small proportion of the total parking supply at discounted rates and its locations are not well known, especially to occasional visitors. The cost of pay parking downtown during the weekend is quite reasonable, with an average four hour stay costing between $1 and $6. However, given the large supply of free parking available at suburban shopping centres any parking cost can be considered a barrier to prospective visitors.

It is recommended that the number of discounted parking spaces be increased within the downtown core. Ideally, a large number of these less-expensive spaces would be provided in on-street locations, in close proximity to retail areas. This would serve the dual purpose of providing easily visible and adjacent discounted parking to visitors, while also advertising the downtown's weekend parking program.



Other issues such as the visibility of parking in the downtown, wayfinding and directional signage to and from parking areas must also be addressed. A comprehensive parking signage and wayfinding program needs to be instituted to highlight parking availability in the downtown and to direct visitors between parking structures and retail areas.

RECOMMENDATIONS:

- Expand the discounted parking program to include Saturdays as well as Sundays.
- Increase the number of discounted parking spaces available for the retail core area to at least 6,000 spaces.
- Coordinate with parking authorities to offer the majority of discounted parking spaces in metered, on-street spaces or in surface parking lots throughout the retail core area.
- Institute a comprehensive parking signage and wayfinding program throughout the downtown retail core.

Safety

Strategies to deal with issues of safety in the downtown core fall into two general categories: strategies that increase the actual safety of downtown visitors, and strategies that increase the perceived safety of downtown visitors.

The former refers mainly to actual crimes both personal and property, that are committed in the retail core. While the number of crimes has been increasing in the downtown at a faster rate than in the city as a whole, the overall crime rate within the downtown is still lower than the crime rate for other major metropolitan downtowns in Canada such as Toronto, Montreal, Edmonton, and Vancouver.

Therefore, issues of safety relate much more to visitor's perceived level of danger rather than to actual crimes or complaints. Issues such as graffiti, homelessness and panhandling, a run-down physical environment, poor street lighting, and a lack of visible police presence have an adverse effect on visitor's perceptions of downtown as a safe place to be, especially after dark. Calgary's Downtown Association has undertaken efforts to minimize the appearance of graffiti, to decrease the number of homeless on the streets of the downtown, and to work with the area's new Community Policing Office to implement programs with the aim of decreasing crime in the downtown.

Going forward, however, additional strategies such as the "Downtown Ambassador" program used by the Downtown Vancouver Association may work to minimize safety concerns in Calgary's downtown core. The Vancouver program utilizes a number of uniformed, security/hospitality "ambassadors" on foot or on bicycle throughout the downtown. These individuals provide eyes on the street, report disturbances, and offer tourism information and local directions to visitors. These ambassadors significantly increase perceptions of safety through observation, while also aiding public relations and adding to the general downtown experience for visitors.

RECOMMENDATIONS:

- Liaise with the Community Policing Office to determine adequate strategies that make crime prevention and personal safety programs more effective and visible to downtown visitors.
- Incorporate strategies that minimize graffiti, improve the physical appearance of downtown spaces, and provide adequate street lighting into the design of the public realm.
- Continue to work with the City, provincial social welfare agencies, and local not-for-profits to coordinate outreach programs that provide services to get homeless individuals off the street.
- Explore the creation of a "Downtown Ambassador" program similar to those that exist in other cities.

Surrounding Issues

The goal of a more vibrant and successful retail core will not be achieved simply by addressing issues, problems, and challenges within the core.

The retail core is just one part of a larger downtown area and the linkages and inter-relationships between the retail area and the rest of the downtown are essential to maintaining vitality and creating a vibrant and viable retail core area.

The factors that contribute to the success of other cities' downtowns can help play a part in enhancing and providing direction for the development of downtown Calgary. For this reason, the retail core enhancement strategy needs to look beyond the retail core area to identify strategies and actions that can contribute to a more vibrant central area.

Downtown Calgary is home to more than just retail uses. The central area features a number of arts and cultural attractions (the Glenbow Museum, the Art Gallery of Calgary, the EPCOR Centre for the Performing Arts, the Lunchbox and Globe theatres, etc.), several significant tourist attractions (the Calgary Tower, the Calgary Science Centre, Fort Calgary, etc.), a host of successful major festivals and celebrations (the Calgary Stampede, Canada Day celebrations, the Jazz Festival, etc.), and a selection of attractive parks and natural areas (Olympic Plaza, Prince's Island, Shaw Millennium Park, etc.)

Together these attractions draw between 3.5 and four million visitors to the downtown core annually. Given this volume of visitor traffic, the expansion of arts, entertainment, tourism, recreational and special events attractions within the downtown core can act as a significant catalyst for retail revitalization. These types of uses also offer significant potential for cross-marketing opportunities that advertise the downtown core as a single entity, offering a diverse array of attractions.

While Calgary currently offers a significant array of arts, entertainment and cultural activities within its downtown, there are some uses which could be added or expanded. An examination of other North American cities of comparable size to Calgary suggests that there may be some potential for an expansion to the number of cinema screens within the downtown core area. Currently, Calgary has eight cinema screens in the downtown (five major release screens and four showing smaller independent and art house films). Other cities such as Ottawa, Ontario have as many as 16 cinema screens in its downtown core, while Providence, Rhode Island has 20 cinema screens within its central area.

This suggests that there may be some potential to encourage additional cinemas (or expansion of existing theatres) within Calgary's downtown.

Other projects such as the University of Calgary's proposed downtown campus would bring significant additional day and evening activity to the downtown core. The university is proposing the development of a 600,000 square feet complex featuring a mixture of educational, commercial and residential uses within the East Village area of the downtown core. This complex would join similar educational facilities within the downtown such as those run by the Alberta College of Art and Design, the Southern Alberta Institute of Technology, Bow Valley College and Mount Royal College that aid in diversifying the pattern of use within the core and support to retail activity in the area. Going forward it will be important to coordinate with the University of Calgary to determine the siting, design and use mix of their development to ensure that it will support retail and associated uses within the core area.

While entertainment, arts, tourism, recreational, special events and educational attractions will most certainly support retail growth, it is the expansion of the downtown's local population base that will have the most significant impact on retail revitalization in the central area.

In order to ensure the long-term vitality of the retail core, Calgary's downtown population must increase beyond its current level of 15,000. Increased numbers of local residents will support not only local-serving uses, but will also provide a larger pool of regular shoppers within the downtown core supporting general merchandise and luxury goods retailers, as well as a variety of service commercial uses such as personal and professional services, health and wellness services, and other activities often closely associated with retail activity areas.

The City of Calgary is currently in the midst of creating a new Downtown Urban Structure Plan that will help to identify the scale and form of residential development in the downtown core. Going forward it will be important for the Calgary Downtown Association to be at the table to work with the City to ensure that housing growth in the downtown occurs in a manner that supports retail core vitality.

RECOMMENDATIONS:

- Encourage the continued development of arts and cultural, entertainment, tourism and recreational uses within the downtown core. Continue to promote downtown as the site for special events and celebrations within the City of Calgary.
- Coordinate with stakeholders to create cross-marketing strategies that see downtown marketed to visitors as a single destination.
- Coordinate with the University of Calgary to determine appropriate siting, design and ancillary uses for their proposed downtown campus that help to support retail vitality in the central area.
- Coordinate with the City of Calgary to provide input into the Downtown Urban Structure Plan regarding in-fill housing, linkages between downtown districts, one-way streets, parking/wayfinding, safety, post-secondary educational uses, and expansion of the Plus 15 System.

CONCLUSION

In comparison to many downtowns in Canada, the City of Calgary is in a strong and enviable position. Retail vitality in Calgary's central core is supported by a dynamic commercial core, a sizeable downtown population, and a number of high-quality arts, cultural, entertainment, and recreational attractions. However, downtown Calgary's role as a retail attraction is slowly eroding. Strong population growth and retail development in suburban locations have contributed to a decrease in the downtown core's retail market share. Downtown Calgary is still a place to work, and a place to visit, but for an increasing share of the Calgary population, it is less a place to shop than it has been in the past.

This retail core revitalization strategy identifies strategies that support retail vitality in the downtown core, while also supporting the preservation of the central area as a vibrant, active and attractive focal point to the City of Calgary. These strategies include:

- *Defining the retail core through improvements in the area's urban design and upgrades to the public realm*. This includes enhanced urban design guidelines and improved signage and wayfinding; all to create a visual and tangible feeling of place within the retail core.
- *Improving access within the retail core*. This includes re-introducing general-purpose traffic moving in both directions on Stephen Avenue and some streets elsewhere in the downtown, and expanding the Plus 15 system to better integrate it with the street. It also includes enhanced legibility of the retail core area.

- *Improving street front retail offerings in the core*. This strategy calls for integrating retail uses into transit stations while placing more active retail uses at grade level. This also calls for new private investment in retail building façades to provide a more attractive "face" to the retail core.
- *Revitalizing Devonian Gardens.* A revitalized Devonian Gardens offers significant potential for downtown enhancement by drawing increased numbers of people into the retail core area. This revitalization could include either the major renovation of the existing facility now being proposed, or an expanded process that explores the feasibility of moving the Devonian Gardens to another site within the downtown core.
- *Expanding the availability and visibility of special "twoonie" weekend parking in the downtown.* The abundance of free parking at suburban shopping centres represents a distinct competitive advantage for those centres. By increasing the amount of discounted, convenient parking in the central core and improving the wayfinding system to allow easier navigation between parking and shopping areas, a significant barrier for downtown visitors would be eliminated.
- *Improving the perception of safety in the retail core area.* The introduction of "Downtown Ambassadors" into the retail core will improve visitors perceived level of safety while also providing assistance and local information to downtown visitors.
- *Expanding the downtown housing market.* Greater numbers of local residents will provide a larger pool of regular shoppers within the downtown core, supporting general merchandise and luxury goods retailers, as well as a variety of service commercial uses.
- *Expanding tourist, arts and cultural, recreational, and entertainment offerings in the downtown core, while also improving linkages between these types of uses.* Recreational, arts and cultural uses in the downtown core provide support for retail activity by generating a steady flow of activity within the central area during both day and evening hours.
- *Supporting expanded educational uses in the downtown core.* These types of uses aid in diversifying the pattern of use within the core and support local retail vitality.

It should be noted however, that there is no single strategy that will create a vital and active retail core in downtown Calgary. All of the strategies put forth above will need to be advanced together in order to create the maximum potential for success.

To that end, there exists a great deal of research and numerous plans all aimed at revitalizing or improving Calgary's downtown core. Moving forward, it will be extremely important to implement these plans. The City of Calgary is currently in a unique situation, dramatic economic growth and an expanding population are providing the city with a strong catalyst to carry out positive change. Action should be taken now to capitalize on this opportunity while conditions are most favourable.