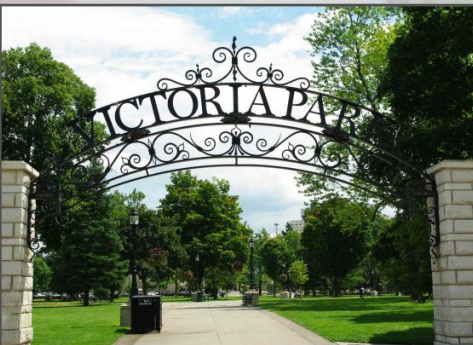




# Reconnaissance & Strategic Assessment

Evaluation & Recommendations to Advance London's Downtown

Monday October 24, 2016



**LiveWork**  
**LearnPlay**

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# Statement of Mandate

## Reconnaissance & Strategic Assessment

This Reconnaissance and Strategic Assessment is the culmination of a 4-month process undertaken by LiveWorkLearnPlay (LWLP) between May and August 2016 in collaboration with Downtown London. The goal of this tool is to **provide an overview assessment of the downtown's challenges and opportunities**, offering **ideas, recommendations** and **direction on priorities** that should guide future planning, development and investment decisions, **with the view towards helping London's Downtown to grow and improve upon itself.**



## LWLP's Key Objectives

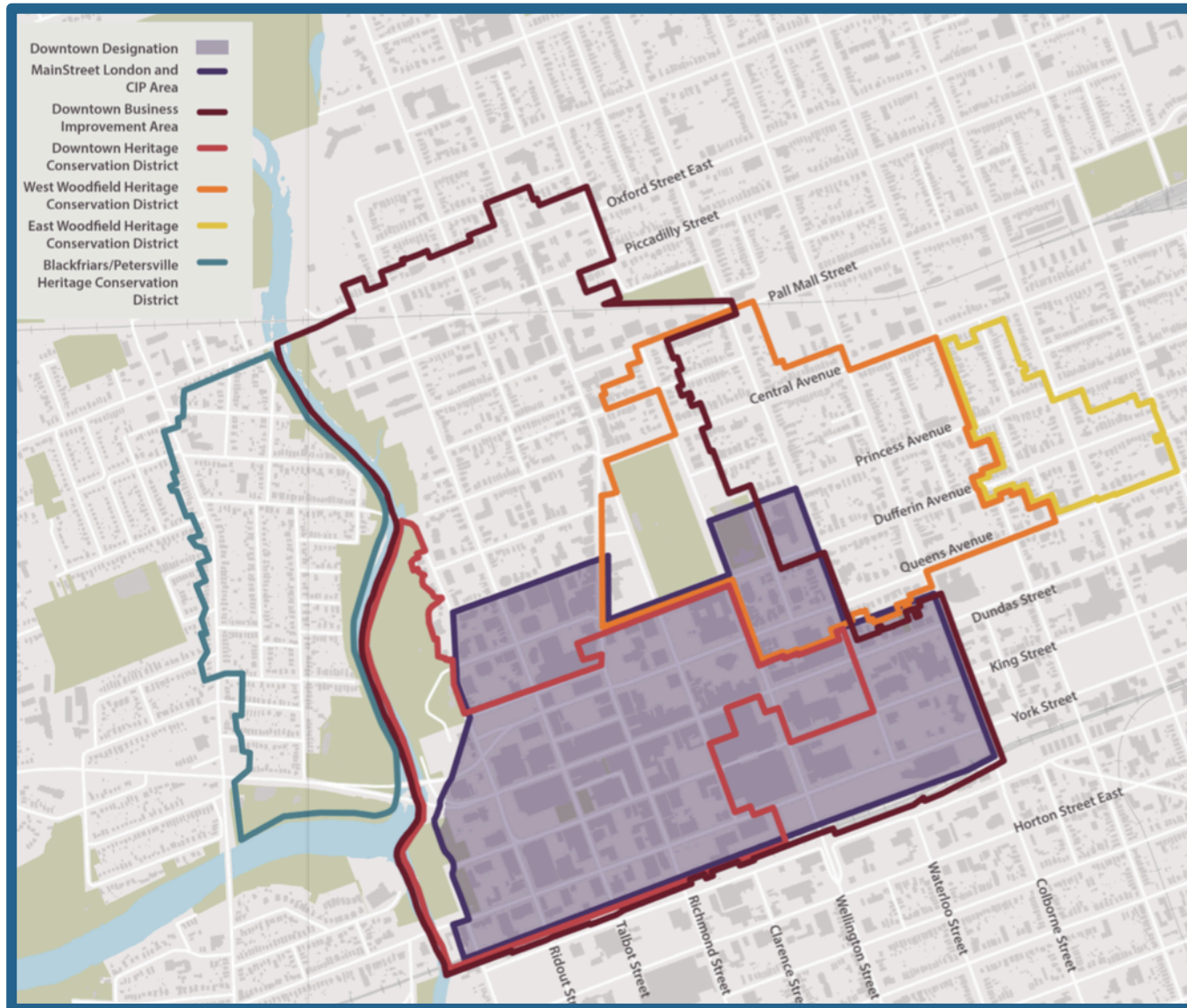
1. Review of existing plans, objectives, and information relating to Downtown London
2. Develop a contextual understanding of Downtown London, including:
  1. The surrounding region, and
  2. Key downtown stakeholders
3. Provide preliminary guidance on priority enhancement strategies for the development of Downtown London
4. Identify enhancement opportunities for key nodes/districts in early phases of Downtown London
5. Identify and facilitate ongoing dialogue key stakeholders relating to current and future retail assets in or nearby Downtown London





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# Context: Downtown London Study Boundary

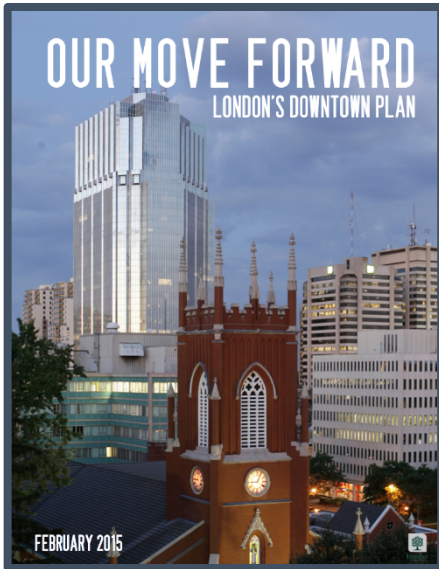


Downtown London occupies a complicated geography, with several overlapping boundaries and areas of interest including:

- The Downtown London! Business Improvement Area's Boundaries: ■
- City of London Boundaries: ■
- 4 overlapping or adjacent Heritage Conservation Districts: ■ ■ ■ ■

*For the purposes of this Reconnaissance and Strategic Assessment the Downtown area has been defined within the boundaries of the Business Improvement Area's boundaries as outlined by: ■*

# Context: The Policy Context of Downtown London



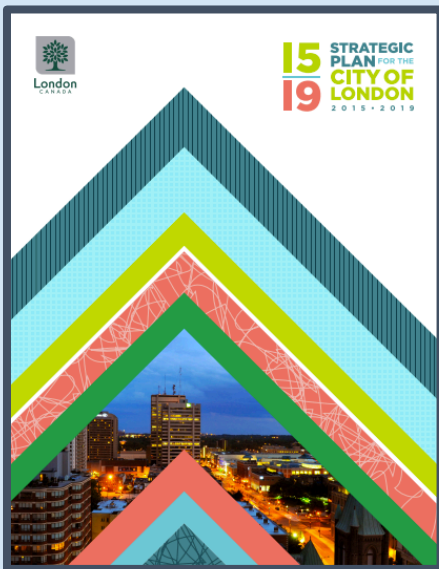
## The Downtown Plan

- Sets the vision for the downtown's revitalization
- Identifies opportunity sites for redevelopment
- Overviews several transformational projects for London's Downtown
- Provides tools and implementation strategies to see that these transformational projects can be completed



## Community Economic Roadmap

- Designed to work in conjunction with the City of London's Strategic Plan to achieve economic priorities, objectives, and actions for a 5-year period
- Develops actions, tools and strategies for 5 key focus areas – the Downtown is one



## City of London Strategic Plan

- Identifies the mission, values, and strategic focus areas of London's City Council from 2015-2019
- Establishes strategies, initiatives, and goals for the achievement of each strategic focus area – the downtown is one

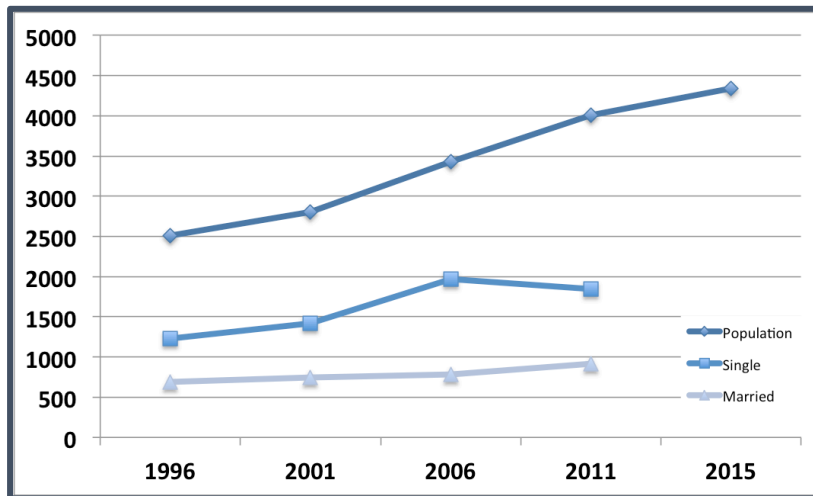


## State of the Downtown Report

- Provides measurements, trends, and data outlining the economic health of downtown
- Discusses the changes and opportunities of the downtown
- Is used as the measure of success and benchmark for other plans

# Context: The Downtown at the Present Moment

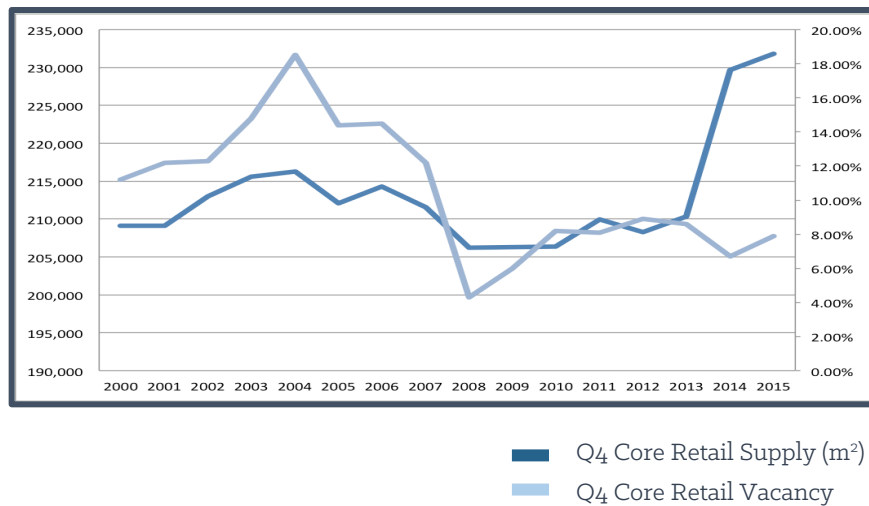
## Population



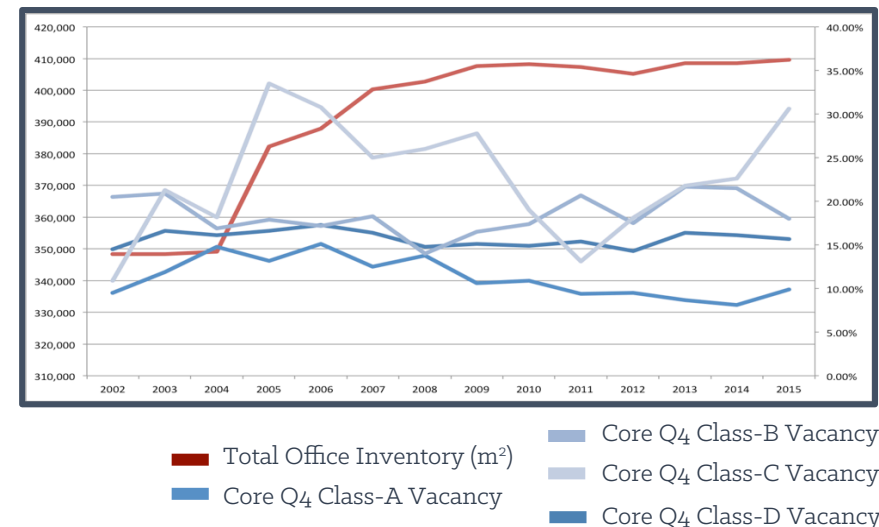
## Residential Market

| Variable / Year          | 2011 (% Change 2006) | 2015 (Estimate) |
|--------------------------|----------------------|-----------------|
| Total Occupied Dwellings | 2,600 (22%)          | 2820            |
| Apartments <5 Storeys    | 615 (7%)             | 645             |
| Apartments >5 Storeys    | 1975 (28%)           | 2165            |
| Owned                    | 545 (-11%)           | 735             |
| Rented                   | 2065 (36%)           | 2035            |
| Average Rent             | \$1074/month         | ↑               |
| Average Value            | \$172,447            | ↑               |

## Retail Market



## Office Market



# Key Considerations of Downtown London: SWOT Analysis

## Strengths

### Downtown

- Growing percentage of **technology and creative sector locating downtown**
- Strong entertainment & cultural anchors
- **Large stock of unique heritage properties**
- Proximity to the Thames River & Parkway
- Previously **hosted large scale national and international events**
- Prominent downtown supporters, champions, and investors
- **Affordable real estate market**

### Macro (London & Region)

- **Nationally & internationally recognized post-secondary institutions**
- Internationally recognized **health institutions**
- Increasing attractiveness of London real estate market
- **Strong provincial & federal government presence** and employment base
- **Regional center** for surrounding Middlesex County
- Affordable housing market
- **Active and strong development sector**

## Weaknesses

- **Uncertain political support** for downtown revitalization
- **Concentration of drug related activity**
- **High rate of commercial and retail vacancies**
- **Concentration of downtown land and building ownership** by limited number of stakeholders
- **Over designation of heritage properties** within the downtown area
- **Centralization of social services**
- **Lack of public understanding** of the role of downtown
- **Lack of consistency along Richmond Row** street edge

- **Lack of “eyes-on-the-street”** during evening hours
- **Economic development does not see the downtown as a core priority**; must work in conjunction with city building efforts
- **Public safety concerns**
- **Negative public perceptions of the downtown**

# Key Considerations of Downtown London: SWOT Analysis

## Opportunities

### Downtown

- **Concentration of university student life at Richmond & Oxford**
- **Centralization of downtown governmental responsibility and coordination**
- Momentum being created due to Fanshawe's downtown campus investment
- **Potential town and gown partnerships** with large institutional anchors such as Western University & London Health Sciences Center
- **Access to the majority of London's "9-5" business population**

### Macro (London & Region)

- City of London is currently undertaking work to **re-establish connection with the Thames River** riverfront
- Recapture the public's nostalgia of downtown London
- **Downtown will play a central role within London's SmartMove Transit Plan 2030**

## Threats

- **Suburban areas eroding the primacy of downtown** within London's cityscape
- Disproportionate amount of **social service usages in the downtown** at present
- Perceived **lack of mainstream broker interest** in downtown commercial space leasing
- **Numerous surface parking lots in prime redevelopment sites**
- Difficulties in raising families within the downtown area
- **Animosity between downtown property owners**
- **Lack of access to utilities and spaces for large scale public events**

- **Difficulty in redeveloping heritage properties** to bring them into adherence with the Ontario Building Code
- Very high commercial office vacancy rate – **suppresses ability to engage in new development**
- **Challenges identified in leasing commercial office space despite vacancy**
- **Continued conversions of suburban retail space** to office space further eroding downtowns office stock
- **Abundance of free parking at suburban retail centers**

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1

## Downtown London! Advisory Team

- Janette MacDonald – CEO & General Manager
- Kathy McLaughlin – Manager: Mainstreet Program
- Andrew Sercombe – Marketing Coordinator
- Jim Yanchula, Manager, Urban Regeneration: City of London
- Charles Parker, Senior Planner: City of London

2

## City of London

- Mayor Matt Brown
- Councillor Tanya Park
- City of London Planning Department
- Art Zuidema, City Manager
- Senior Leadership Team, City Directors
- Chief John Pare & Deputy Chief Daryl Longworth
- Kapil Lokotia, President & CEO & Keith Gibbons, Board Member, London Economic Development Corporation
- Dundas Place Environmental Assessment Team (Dillon Consulting)

3

## Social Services

- Steve Cordes, Executive Director: Youth Opportunities Unlimited
- Dr. Chris Mackie, Medical Officer of Health: Middlesex London Health Unit
- Laura Di Cesare, Director of Corporate Services: Middlesex London Health Unit
- Jan Richardson, Manager, Homeless Prevention, Neighbourhood, Children and Fire Services: City of London

4

## Private Sector & Cultural Institutions

- Shmuel Farhi, Founder: Farhi Holdings
- Adam Carapella, Vice-President: The Tricar Group
- Amanda Stratton, Managing Partner: Hacker Studio
- Marvin Rivas, Owner: Che & The Honest Lawyer
- Jeff House, Co-Founder: JeffHouse
- Justin Konikow, Co-Founder: TheClosers
- John Rodgers, Principal: The Rygar Group
- Mike Manuel, Owner: London Music Hall
- Vito Frijia, President: Southside Group
- Jens Stickling, CEO: Westany Holdings
- Michelle Giroux: Fanshawe College
- Jamie Crich, President: Auburn Developments
- Kurt Bromhall, Property Manager: London City Center
- Dennis Winkler, Owner: Winks Restaurant
- Peter Rocca, CEO: Start Communications
- Lori Da Silva, CEO & General Manager: London Convention Center
- Kathy Navackas, Executive Producer: London Fringe Theatre Festival
- Shannon McCartney, Account Manager: Impark
- Julia Stewart: DL Board Member
- Carolyn Young: Western University Continuing Education

# What IS Working In Downtown London



## 1. Strong Bones

**Downtown has strong** bones including:

- Established fine-grain streetgrid
- Cluster of important commercial uses including an established office cluster
- Plentiful significant park and open spaces to meet resident needs
- Good transit connectivity to the rest of the City and the GTA region
- Good selection on Food and Entertainment offerings



## 2. Strong Anchors

Downtown has **several strong anchors that create powerful attractive forces, animation, and counter-cyclical market forces** for the entire city. These anchors include:

- London Convention Centre
- Budweiser Gardens
- Covent Garden Market
- Fanshawe College – Phases 1 and 2
- Victoria Park

To date the City of London has invested approximately \$190,000,000 into these anchors since 2002.



## 3. Emerging Regional Identity

Downtown is currently emerging within the surrounding market as **a place with a unique identity of providing exceptional music and culture**:

- The renovation of the London Music Hall, the upcoming music hall of fame
- The growth of live nights at other establishments on the dundas corridor and quality of acts brought to Budweiser Gardens
- A great relationship with London Tourism

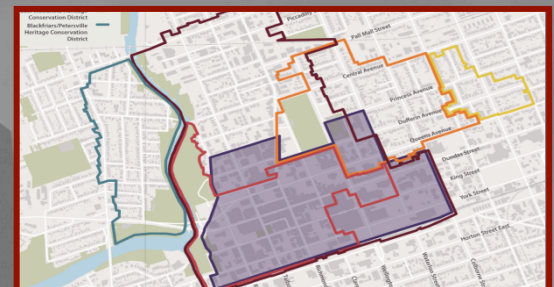
# What IS NOT Working In Downtown London



1. Drugs Use & Street Culture



2. Supply of Development Sites



3. Conflicting Mandates



4. Coordinated Ec.Dev.



5. City Commitment



6. Desired Retail Experience



7. Heritage



8. Urban Design



9. Customer Service Provision

# What IS NOT Working In Downtown London



## 1. Drugs Use & Street Culture

Drug Use and Street Culture is seen by all as the **defining issue in the downtown**. The issues identified include:

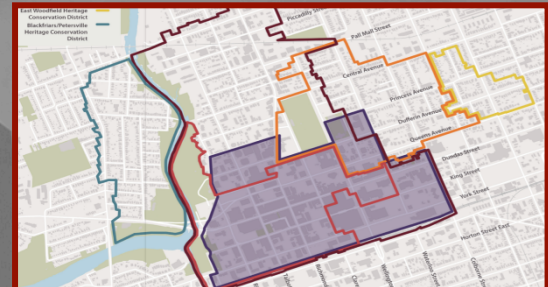
- A centralized collection of overlapping social services, some who take a less rigorous approach to case-management
- The type of drug use in London
- Funnelling of city buses along the main corridor
- Institutions and businesses confronting the issue by not occupying public spaces



## 2. Supply of Development Sites

There is a **shortage of developable downtown sites** due to the majority being concentrated with a limited number of landowners.

- Downtown has numerous surface parking lots on prime development sites
- Shortage of sites has yielded inflated land prices for other developable properties and inflated commercial rents
- Stakeholders identify lack of co-ordination and communication among downtown landowners



## 3. Conflicting Mandates

There is the perception of an **absence of ownership of downtown management and operations**:

- A lack of co-ordination and communication between municipal departments result in inefficient practices and slow adoption of possibly catalytic changes for the downtown
- An absence of a central municipal department, group or individual to act as a resource or facilitator



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5. Next Steps

# Strategic Recommendations for Downtown London!

## Immediate



**Disarm Drug Use & Street Culture**

## Short-Term



**Advance Downtown Transformations**



**Pilot New Strategic Interventions**

## Medium-Term



**Sponsor More Development Downtown**



**Reprogram & Retenant Downtown**

## Long-Term



**Coordinated Economic Development**



**Plan for Town & Gown Integration**



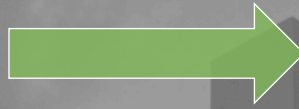
**Improve the Downtown Experience**

# Immediate Recommendations

Immediate




Disarm Drug Use & Street Culture



- A. Establish “Green Zones” in the Downtown
- B. Establish a Coordinated Approach between City Staff, Local Agencies, Downtown Stakeholders, Police & Health Units



## Potential “Green Zones”: Places to Progress to & Stop At

An aerial photograph of downtown London, Ontario, showing a grid of streets and the River Thames. A green oval highlights a park area near the river. A green line with arrows at both ends follows a path through the city, starting from the bottom left, moving up and right, then turning left and following a street. White arrows point from the text boxes to specific locations on the map. Labels for 'Richmond St' and 'Wellington St' are oriented vertically. A faint 'Dundas St' label is visible near the bottom right.

Green Zones should be established along **Dundas Street** (ahead of it becoming Dundas Place), **Victoria Park** and retrofitted into **Market Lane**.

These areas are critical areas to the downtown (main & main and the central green space respectively) that, in tackling the drug and street culture issue, have removed features that would make them safe and pleasant to occupy.

# Short-Term Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



- A. Establish Activation and Safety Plans**
- B. Appoint an “Urban Coordinator” to Manage the Downtown Area**
- C. Manage New Transformative Projects with a Holistic View of the Whole Downtown (AKA: Strike a Downtown Working Group)**

# Short-Term Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



Pilot New Strategic Interventions

## New Interventions: Gateways, Things-To-Do, More Activity



# Pilot New Strategic Interventions in the Downtown

|  |   |                         |  |                           |  |
|--|---|-------------------------|--|---------------------------|--|
| Sports & Physical Activity Activations | Sports Outfitter - Bikes, rollerblades, snowshoes, etc.<br>Pop-up Bike Repair/Self-Repair Station<br>Ice Climbing (Seasonal)<br>Ice Slides/Urban Luge (Seasonal)<br>Small Outdoor Rink<br>Outdoor Fitness Equipment<br>Rock Climbing Center/ Wall<br>Roller Skating Rink<br>Zip-Lining<br>Ropes Course<br>Naturalized Playground<br>Outdoor Ping Pong/Foosball Tables<br>Basketball Court<br>Beach Volleyball<br>Hockey Nets<br>Outdoor Slip & Slide (Summer)<br>Bixi Terminal<br>In-line Path<br>Skating Canal<br>Mini Putt  | Outdoor Screen          | Live Streaming (Sports), Movies, Events<br>City/Street Scenes<br>Faces from around the world<br>Interactive Games<br>Live Webcam (Skype)<br>Interactive Light & Sound Displays<br>Light Therapy<br>Garden of Lights<br>Light Shows   | Sports, Wellness & Events | Hockey Night<br>Olympic Village<br>March Madness<br>Superbowl<br>Grey Cup<br>MLS Experience<br>World Cup Soccer<br>Grand Prix<br>MLB Roadshow<br>NFL Sundays<br>Summer Hockey<br>Quad Windsor presents MTL 3-on-3<br>Quad Windsor presents Volleyball in the City<br>Foga<br>Cross Fit<br>Tai-Chi<br>Boot Camp<br>Sp   |
|  | Food Hub/Food Central<br>Shipping Container Food Village<br>Food Kiosks<br>Rotating Food Trucks<br>Urban Demonstration Garden<br>Coffee Carts<br>Beer Garden & Resto<br>Cooking School<br>Cabane à Sucre with Maple Snow (seasonal)<br>Design Lab (Interactive Planning Area)<br>Artisan Shops/Kiosks<br>Makers Space<br>Ice Hotel<br>Public Art Structures<br>Graffiti Walls<br>Art Park<br>Ice Sculptures (Seasonal)<br>Amphitheatre/Stage<br>Sports Statues<br>Garden Art<br>Fashion Incubator Space<br>DJ Booth<br>Tech Working/Robotics Showcase (ETS)<br>Pop-up Fashion Retail (Quebec Design Showcase)<br>ETS Tech Art<br>Interactive Public Art Installation (e.g. My Montreal)<br>Large Picture "Frames"<br>Photo Booth<br>Giant Chairs<br>Love Locks<br>Musical Swings<br>Human Piano<br>Giant Games (Jenga, Connect 4, Tic Tac Toe)<br>Giant Kaleidoscopes<br>Lego Display<br>Garden Sanctuary<br>Relaxation Center<br>Meditation Room<br>Urban Demonstration Garden<br>Urban Spa<br>Living Wall<br>Reading Room |                         | Lighting & Sound   |                           | Quad Windsor Running Club<br>Quad Windsor Walking Club<br>Griffintown/Lachine Canal Walking Tour<br>Griffintown/Lachine Canal Biking Tour<br>BBQ Fest (Food Festival)<br>Vegetarian Food Festival<br>Harvest Festival<br>International Food Festival<br>Wine and Cheese Festival<br>Beer Fest<br>Cabane à Sucre in the City<br>High School Culinary Challenge<br>Chef Challenge<br>Arts & Crafts<br>Reading Circles<br>Day Camps<br>Star-Gazing<br>Mommy & Me<br>Movies<br>Concerts (local sounds)<br>Dance Lessons<br>Completement Cirque<br>Nuit Blanche<br>Quad Windsor's Block Party<br>Improv Montreal<br>Arts Fest<br>Local Artisan/Makers Market<br>Fashion<br>Holiday Market<br>Canada Day<br>Halloween<br>New Years<br>Valentine's Love Luau<br>Winterfest/Winter Village |
| Food & Beverage Activations            |   | Water Features          | Fountain with Seating Area<br>Wishing Pond<br>Waterfall Swing<br>Splash Pad Area<br>Interactive Water Features<br>Aquarium/Fish Displays<br>Mist Machines<br>Unique Benches<br>Lawn Chairs<br>Muskoka/Adirondack Chairs<br>Colourful Movable Chairs<br>Bean Bags<br>Umbrellas<br>Hammocks<br>Arenas Seats<br>Shade Features<br>Picnic Tables<br>Sitting Pods<br>Warming Lamps<br>Public Art-Seating<br>Fire Pits | Food Festivals & Events   |  |
| Arts, Design & Cultural Activations    |   | Furniture & Seating     | Enhanced Site Connectivity - Designed Walking Paths<br>Bike Paths<br>Signage/Wayfinding<br>Connection from Windsor Station<br>Connection from Bell Center<br>District Branding<br>Hardscape/Grass/Paving   | Family Fun                |  |
| Relaxation Activations                 |   | Full Site Interventions |  | Arts & Entertainment      |  |
| "Urban Playground" Activations         |   |                         |  | Holiday Events            |  |

**An example "menu" of urban activations based on a clients unique goals, end users, development objectives...** For downtown London, these interventions (and many others) could work, so long as they are properly tested – physical exploration of needs, business plans, understanding of spin-offs, etc.

# Strategic Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



Pilot New Strategic Interventions

Medium-Term



Sponsor More Development Downtown



- A. Establish a City “Gold Star” Program for Downtown Developments
- B. Unlock Underutilized Development Sites in the Downtown
- C. Take a Review of Heritage Assets in the Downtown

# Strategic Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



Pilot New Strategic Interventions

Medium-Term



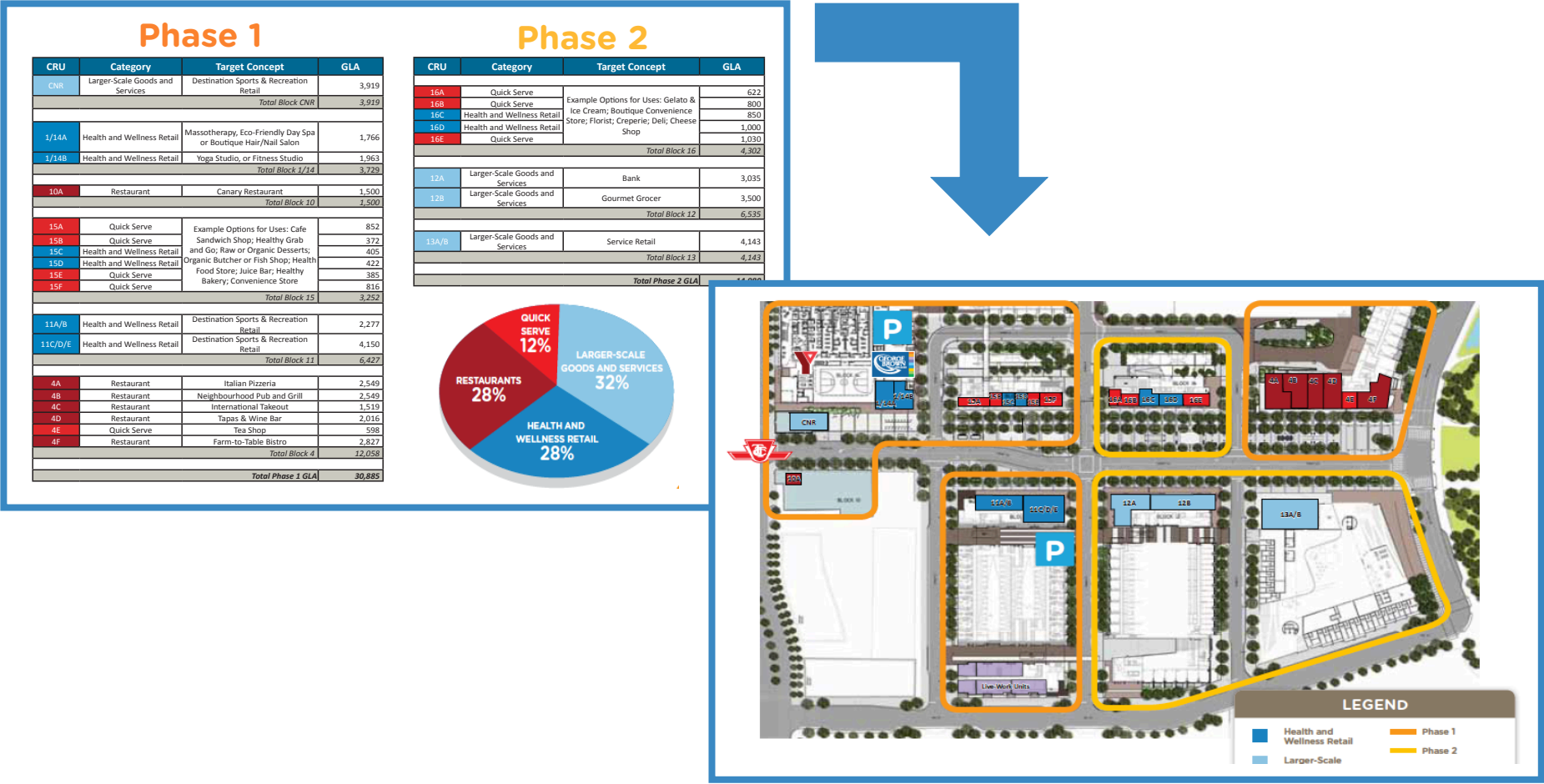
Sponsor More Development Downtown



Reprogram & Retenant Downtown

# Strategically Reprogram and Retenant The Downtown

**A. Establish a Targeted Leasing and Programming Strategy for the Downtown**  
to recruit the right tenants, achieve viable rents and establish long-term uses within the downtown. Steps to achieving this strategy should include:



# Strategic Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term

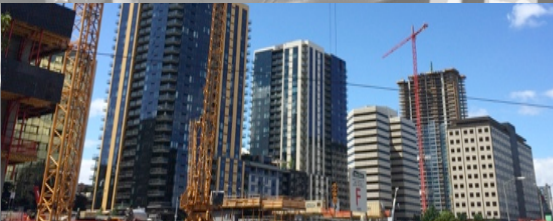


Advance Downtown Transformations



Pilot New Strategic Interventions

Medium-Term



Sponsor More Development Downtown



Reprogram & Retenant Downtown

Long-Term



Coordinated Economic Development

**A. Review & Coordinate Initiatives Related to Downtown Attraction, Events, Marketing & Other Economic Development Priorities**

## The Downtown is the Economic Engine of the entire City

**When investment is made in the downtown, it pays off for all of London by creating increased taxes, tourism, activation, entertainment and more... It improves neighbourhood economic resiliency**



# Strategic Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



Pilot New Strategic Interventions

Medium-Term



Sponsor More Development Downtown



Reprogram & Retenant Downtown

Long-Term



Coordinated Economic Development



Plan for Town & Gown Integration



**A. Support and Plan for Increased Town & Gown Integration**

# Strategic Recommendations

Immediate



Disarm Drug Use & Street Culture

Short-Term



Advance Downtown Transformations



Pilot New Strategic Interventions

Medium-Term



Sponsor More Development Downtown



Reprogram & Retenant Downtown

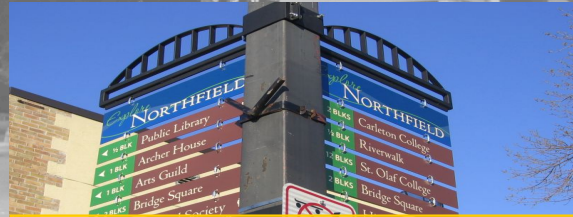
Long-Term



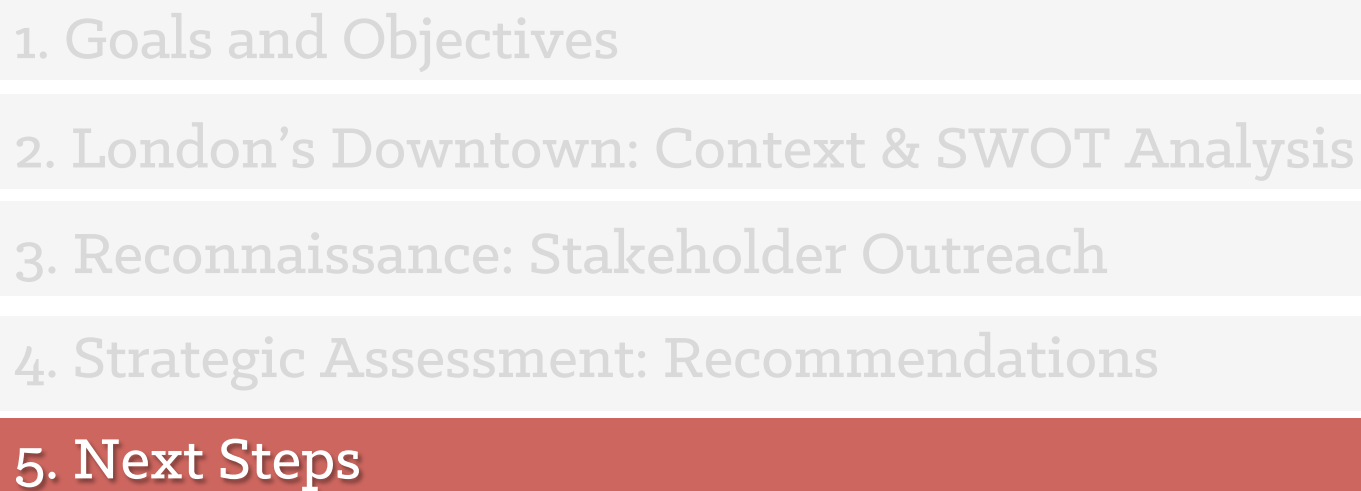
Coordinated Economic Development



Plan for Town & Gown Integration



Improve the Downtown Experience



# Next Steps for Downtown London



## Establish the Downtown London Working Group

A Downtown London Working Group should have membership composed of core downtown stakeholders and decision makers:

- Property Owners
- City Staff
- DL! Staff
- Stakeholders

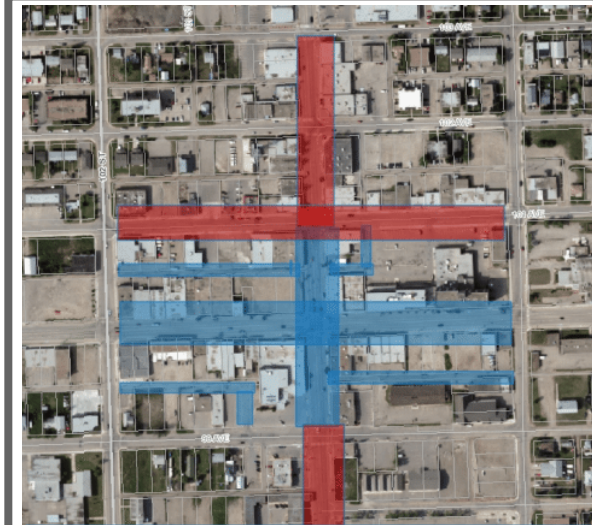
Bring the right people to the table to address the areas where the downtown needs improvement.



## Develop Action Plans to Target Implementable Projects

With direction from the Working Group over which party is the most equipped to lead/champion:

- Develop implementable Action Plans that focus on projects and interventions to help transform the downtown
- Focus on correcting what isn't working



## Implement Projects that Can Transform the Downtown

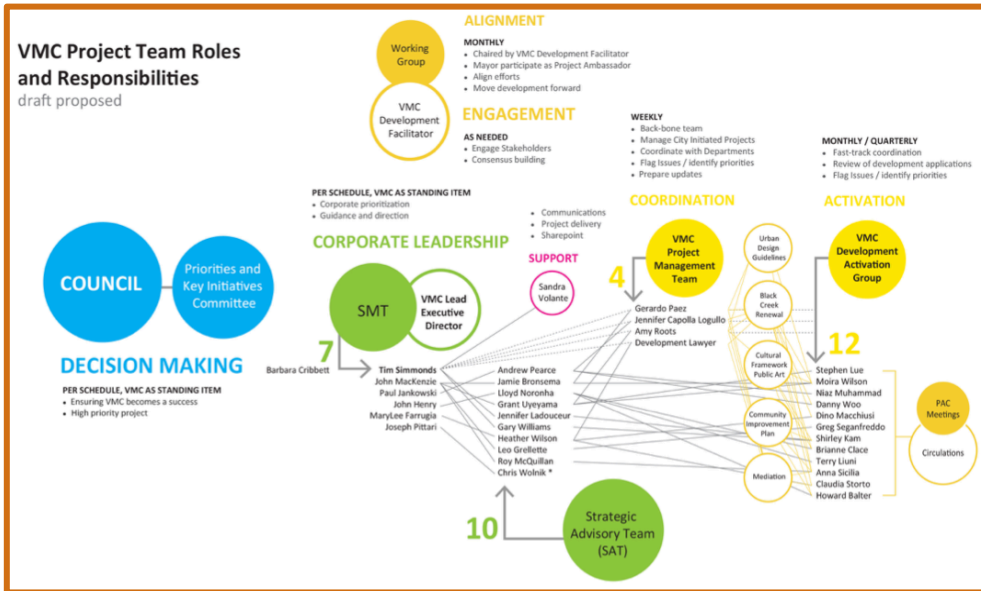
Implement projects be they short-, medium- or long-term undertakings:

- Show civic and stakeholder commitment to the downtown's transformation
- Demonstrate that change is happening
- Test ideas that can form the basis of new developments or commitments

# Next Steps for Downtown London: The Working Group



- A Downtown Working Group **is a tool to ensure that coordination** (Public/Private, Departmental, Service Providers, etc.) is brought to **major city building initiatives**
- It ensures that **mistakes are not unintentionally repeated, work replicated, or problems unaccounted for** so that the maximum value can be unlocked from new initiatives.
- Membership should be made-up of **vested stakeholders who have decision-making power**; some areas to consider are:



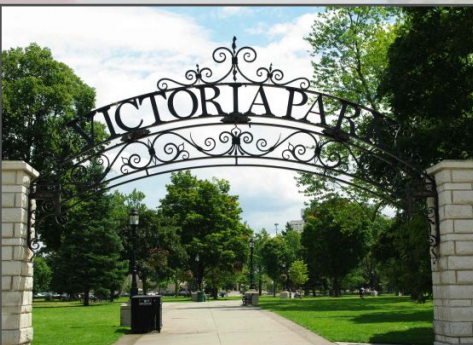
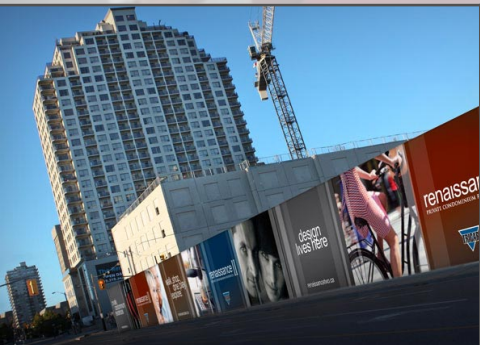
*The City of Vaughan Downtown Working Group: City, Private Sector, Stakeholders and Consultants coming together to further downtown initiatives; supported by a city structure designed to take outcomes from the working group and advance them into action.*



# Reconnaissance & Strategic Assessment

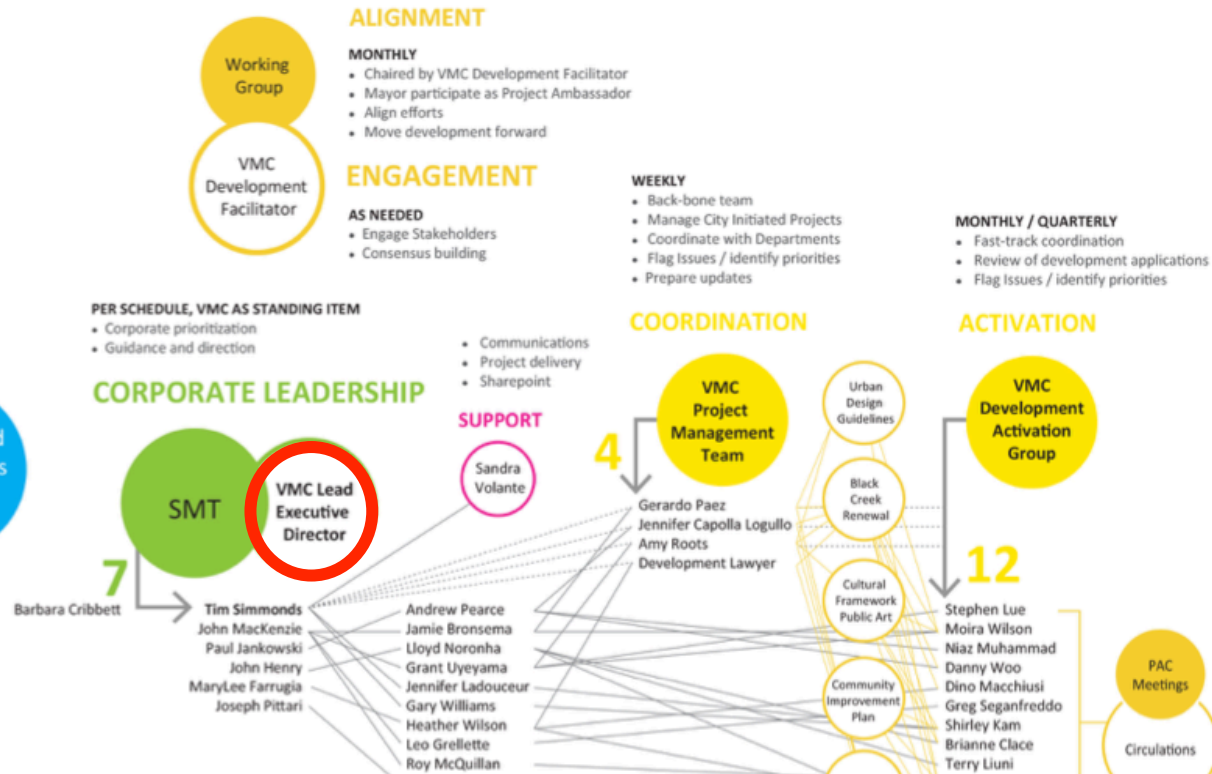
Evaluation & Recommendations to Advance London's Downtown

Monday October 24, 2016



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# The Downtown Coordinator



In Vaughan it is the Executive Director, Office of the City Manager supported by this organization Structure

In Mississauga it is the Manager of the Downtown Collaborative

In London it is likely a role tasked with coordinating various departments that interface with the urban core area