



## EXECUTIVE SUMMARY

# Mapping Growth

## A Comparative Look at Downtown's Transformation (2010-2017)

Downtown Edmonton has transformed significantly over the past few years. 2016-2017 proved to be an eventful year with the grand opening of Rogers Place, Hyatt Place Hotel, and the recent launch of the Downtown Bike Network. The Downtown Business Association has constantly worked towards supporting, connecting and enriching Edmonton's Downtown community. New developments, both private and public, have spurred growth and vibrancy in Downtown, and this report is an attempt to measure how our Downtown has transformed over the last seven years.

The first part of the report will highlight some of the important findings from an online Downtown survey conducted by the DBA from June 19 to July 9, 2017. The results include 1,499 responses from Downtown Residents, Downtown Employees, and Non-Downtown Respondents.

The purpose is to compare how people's opinions and behaviours have changed relative to the changes in Downtown since the last survey conducted in 2010.

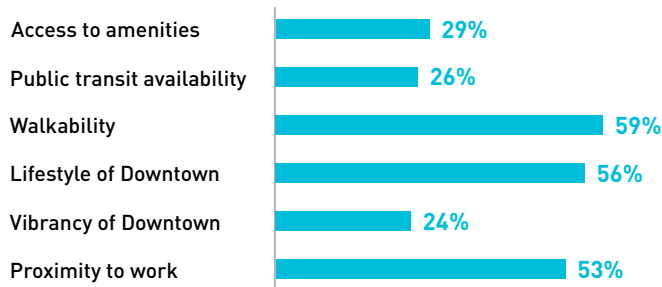
The second half of the report consists of all probable, proposed and rumoured developments taking place in Downtown, based on the 36 projects that were identified by the DBA in 2012 in addition to 14 new prospects for the next five years. These 50 developments are estimated to have a combined value of more than \$7 billion and include a mix of commercial, residential, municipal and other projects.



downtown  
business  
association

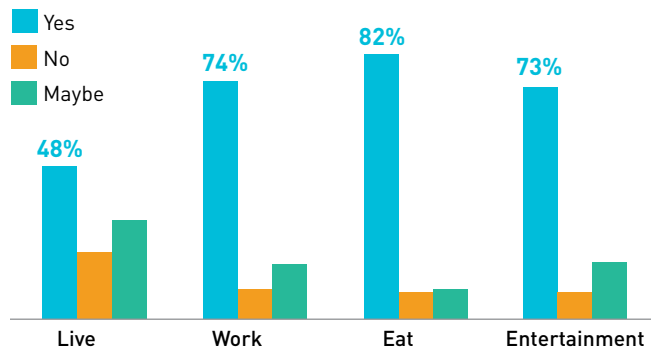
# SURVEY HIGHLIGHTS

## Main reasons to live in Downtown - 2017



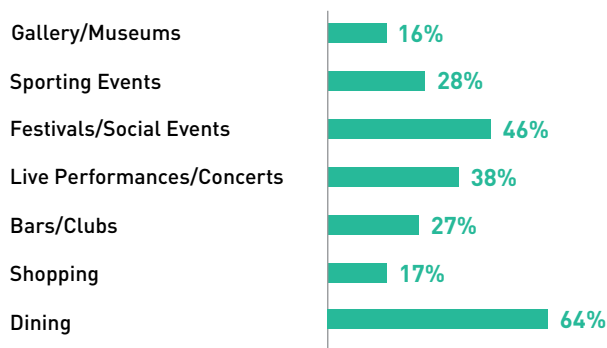
In 2010, main reasons to live in Downtown were "Proximity to shopping and services" and "Proximity to Work". "Walkability" and "Lifestyle of Downtown" have significantly gained importance in 2017.

## Recommending Downtown as a Place to Live, Work, Eat and for Entertainment - 2017



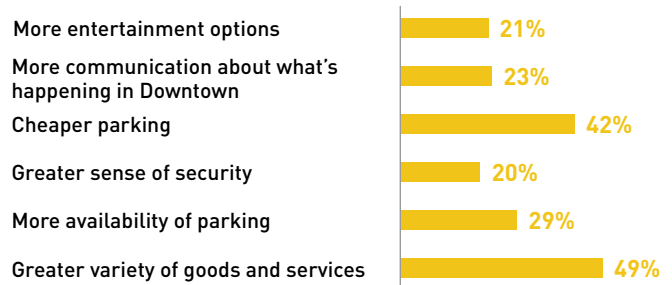
30% of Downtown Residents said that they plan to use the Downtown Bike Network anywhere between "Every day to once a week", while only 12% of Non-Downtown Residents said so.

## Main Purposes to Visit Downtown - 2017



In 2010, "Casual Dining", "Live Performances" and "Festivals" were the top three priorities that survey respondents wanted more of in Downtown. In 2017, they have become the main purposes to visit Downtown.

## Motivations to Make Purchases Downtown - 2017

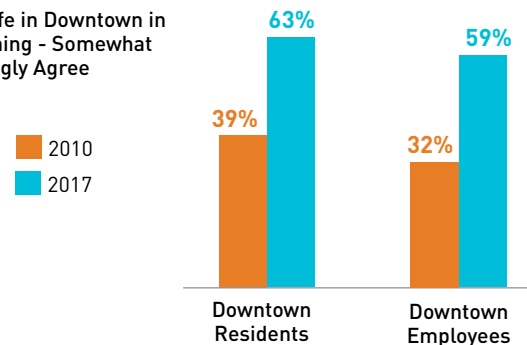


Similar motivations in 2010 and 2017, with the only difference in "Greater sense of security" not being in the top three motivations in 2017, unlike 2010.

73% of the respondents have visited Rogers Place since it opened in 2016. Of these, 45% said that "I patron a Downtown restaurant/bar before or after my visit to Rogers Place". 43% also said that "I walk to Rogers Place."

## Downtown Safety - Significant Improvements

I feel safe in Downtown in the evening - Somewhat or Strongly Agree



## Level of Agreement with Various Statements

I would visit the new Royal Alberta Museum once it has opened in Downtown	84% AGREED
Rogers Place has helped in the revitalization of Downtown	74% AGREED
There is effective communication of what is happening in Downtown	45% DISAGREED
Parking rates in Downtown should be consistent every day of the week, irrespective of event nights	60% AGREED
Downtown is a place for everyone	57% AGREED
A variety of housing options are available in Downtown	40% DISAGREED

# DEVELOPMENT PROJECTS - 2012 REPORT

Name of Development		Value (\$M)	Current Status	Key Figures
<b>Category 1 - Probable Projects</b>				
<b>Commercial</b>				
1	Kelly Ramsey Building/Enbridge Centre	298.00	Completed	551,000 sq. ft.
2	Quarter's Hotel/Hyatt Place	45.00	Completed	255 rooms
3	First & Jasper	20.00	Completed	216,610 sq. ft.
4	Telus Building and Grounds Upgrade/ATB Place	20.00	Completed	-
<b>Residential</b>				
5	Mayfair Village/The Mayfair on Jasper	100.00	Completed	238 units
6	Ultima Condominiums	75.00	Completed	199 units
<b>Municipal &amp; Other</b>				
7	Downtown Arena/Rogers Place	483.50	Completed	819,200 sq. ft.
8	Ancillary Arena Infrastructure	130.20	Completed	-
9	Royal Alberta Museum	375.50	Opening January 2018	82,000 sq. ft.
10	Federal Building and Centennial Plaza	375.00	Completed	-
11	MacEwan University - Allard Hall	180.00	Opening September 2017	430,000 sq. ft.
12	Jasper Ave New Vision (3 Phases)	105.00	In Process	-
13	Boyle Renaissance (Phases I & 2)	64.20	Completed	240 units
14	Quarters Downtown - Armature Infrastructure	56.00	Completed	-
15	Capital Boulevard	17.60	Completed	-
16	Ukrainian Canadian Archives Restoration	16.80	On Hold	-
<b>Total Probable</b>		<b>2,361.80</b>		
<b>Category 2 - Proposed Projects</b>				
<b>Commercial</b>				
17	107 Street Annex/The Edge Building	15.00	Completed	46,910 sq. ft.
<b>Residential</b>				
18	Fox Towers I & II	100.00	Completed	311 units
19	Corners I	-	Renewed	-
20	Azure on the Park	20.00	Proposed	-
<b>Municipal &amp; Other</b>				
21	Capital City Downtown Plan CRL Projects (Excluding Arena and Jasper Ave New Vision)	208.00	In Process	-
22	Norquest College North Learning Centre	192.00	Opening September 2017	242,188 sq. ft.
<b>Total Proposed</b>		<b>535.00</b>		
<b>Category 3 - Rumoured Projects</b>				
<b>Commercial</b>				
23	Edmonton Arena Development Group - Commercial Developments	907.00	In Process	1.3 million sq. ft. office + 300,000 sq. ft. retail
24	102 Street Centre - AIMCo	400.00	Proposed	-
25	Melcor Centre	-	Cancelled	-
26	The Cascadia	70.00	Proposed	-
27	Melton Block	20.00	Proposed	-
<b>Residential</b>				
28	Edmonton Arena Development Group - Residential	625.00	In Process	1,292 units
29	Corners II	80.00	Proposed	-
30	10330 106 Street Condo	-	Renewed	-
31	9847 Bellamy Hill Condo	-	Cancelled	-
32	Augustana Lutheran Church Redevelopment	80.00	In Process	216 units
<b>Municipal &amp; Other</b>				
33	Edmonton Performing Arts Centre/Galleria	200.00	Proposed	-
34	Francis Winspear Centre for Music Expansion	100.00	In Process	-
35	Citadel Redevelopment	-	Cancelled	-
36	Stanley A. Milner Library Renovation	69.00	In Process	-
<b>Total Rumoured</b>		<b>2,551.00</b>		
<b>TOTAL</b>		<b>5,447.80</b>		

## DEVELOPMENT PROSPECTS: 2017 AND BEYOND

Name of Development		Developer	Category	Estimated Value (\$M)	Current Status	Key Figures (Units)
<b>Category 1 - Probable</b>						
1	WSP Tower Reclad	ProCura	Commercial	15.00	Estimated Opening Summer 2017	-
2	Encore Tower	Westrich Pacific Corp.	Residential	120.00	Estimated Opening 2019/2020	179
3	Symphony Tower	Allan Wasnea	Residential	70.00	Estimated Opening 2018	143
4	Jasper House Condominiums	Lamb Development Corp.	Residential	100.00	Estimated Opening 2020	240
5	Students' Association of MacEwan University Building	MacEwan University	Institutional	40.00	Estimated Opening 2019	-
<b>Total Probable</b>				<b>345.00</b>		<b>562</b>
<b>Category 2 - Proposed</b>						
6	North	Lamb Development Corp.	Residential	150.00	Proposed	350
7	Sedona 1 and 2	ProCura	Residential	Not Available	Proposed	106
8	X-Tower	ProCura	Residential	Not Available	Proposed	450
9	Jasper and 108 Street	John Day and Maclab Enterprises	Residential	320.00	Concept/Rezoning	800
10	Quarters - Corners Site	Cidex Group	Residential	70.00	Proposed - Pending	221
11	Healy Towers (106 street condo)	Rise Developments	Residential	400.00	Proposed	1,300
12	Ice District Phase 2	Katz Group/One Properties	Mixed Use	Not Available	Concept/Rezoning	3,000
13	Alldritt Tower	Alldritt Land Corp.	Mixed Use	250.00	Proposed	-
<b>Total Proposed</b>				<b>1,190.00</b>		<b>6,227</b>
<b>Category 3 - Rumoured</b>						
14	109 Street and Jasper Avenue	ProCura	Residential	Not Available	Planning – Two Projects	750
<b>Total Rumoured</b>						<b>750</b>
<b>TOTAL</b>				<b>1,535.00</b>		<b>7,539</b>

## THE WAY AHEAD: CHALLENGES AND OPPORTUNITIES

With more than 1,800 residential units currently under construction and another 6,000-7,000 units being planned, it is anticipated that the Downtown residential population is going to increase substantially in the coming years. Downtown is increasingly becoming the ideal destination to work, dine and for a variety of entertainment options. This influx of people will bring new challenges especially with respect to parking and security. It is essential to improve awareness around parking options and rates, and also promote the use of other means of transportation. More vibrancy and a greater visibility of the Edmonton Police Service can make a notable impact on the level of safety Downtown.

Leveraging the right opportunities will prove to be significant as we bring more people Downtown. Making Downtown more family-friendly is one of the important steps by

promoting housing that can cater to the needs of families as well as development of supporting infrastructure such as child care centres, parks and after school programs. A greater variety of goods and services is also needed. Developers need to offer a mix of both basic neighbourhood amenities and unique shopping destinations by encouraging more creativity and flexibility to meet the demands of potential retailers.

It is imperative to reach out to the community and communicate what's happening in Downtown through strong messaging that emphasizes real success stories and notable initiatives that have made an impact in changing our Downtown. As we move into the next phase of Downtown Edmonton's transformation, it is essential to overcome the stereotypes and create a Downtown for everyone – A Downtown that is identified as inclusive, vibrant and enriching.