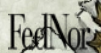




Downtown Sudbury a plan for the future

going downtown growing downtown

Documents à l'appui Supporting Reports



January 2012





section 1

Baseline Reports



goingdowntowngrowingdowntown
a plan for the future

fréquenter et développer le centre-ville
un plan pour l'avenir

May 2011

Downtown Sudbury Master Plan Background Analysis

From Sudbury Junction to Greater Sudbury 2011

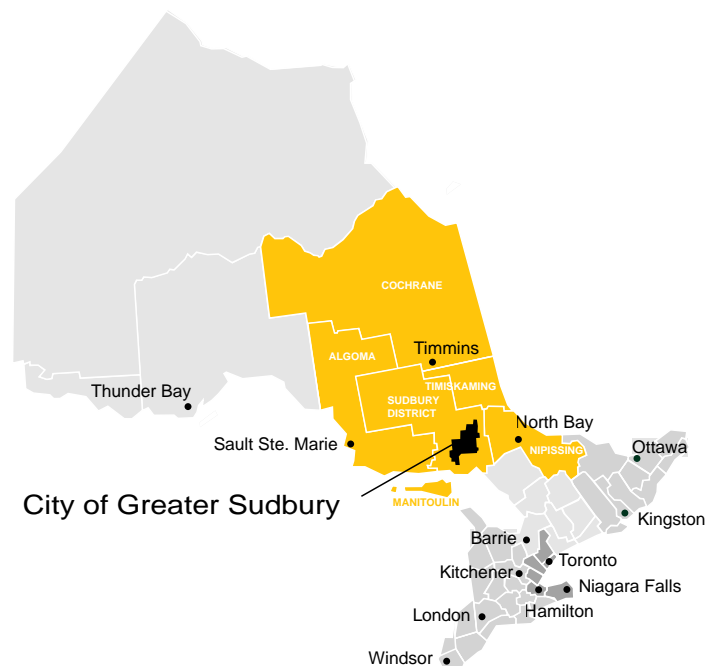
Few cities in Canada have undergone the transformations that the City of Greater Sudbury has undergone since its birth as a railway camp called Sudbury Junction in the late 1800s. Fame and fortune came quickly to the settlement due to the extensive concentrations of nickel-copper ore discovered during construction of the Canadian Pacific Railway in 1883. The development of the railway through the area not only led to the discovery of metals, but also made large-scale mining economically feasible. Capitalizing on this new economic opportunity, Sainte-Anne-des-Pins grew rapidly from a sleepy lumber camp into an important commercial centre and transport hub to serve the various mining camps that sprung up in the area. By 1893, the town well established as commercial hub serving the various mining communities and Sainte-Anne-des-Pins was rechristened as Sudbury.

Although the past 120 years have been brought both boom and bust to this northern city, Greater Sudbury has managed to continue to grow and prosper even in some of the most difficult economic periods. Over the past century, Greater Sudbury has evolved from its modest beginnings as a lumber town to a world-recognized leader in mining innovation and a growing regional capital for northern Ontario. Today, Greater Sudbury is an impressive city with potential to become an even more significant centre in Ontario.

Today, Greater Sudbury has several identities, each of which are summarized below:

Capital of the North

Due to its population, sophisticated cultural offer, level of service provision, community diversity and strength of economy, Greater Sudbury is the Capital of Northern Eastern Ontario, if not Northern Ontario. The Downtown plays an important role in further cementing this position as regional hub and centre of investment for the north. In addition, due to the city's strategic position bridging both southern and eastern Ontario with the far north of the province, the City of Greater Sudbury also acts as a Gateway between the north and these important economic partners to the south and east.



A City of Communities

Greater Sudbury, like many other municipalities, was formed through amalgamation in 2001. The result of this amalgamation was the formation of Ontario's largest municipality (when measured by land area). Within the sprawling boundaries of the City, Greater Sudbury is comprised of 14 communities including Sudbury, Capreol, Dowling, Lively-Mikkola-Naughton, Coniston, Falconbridge, Onaping, Azilda, Chelmsford, Garson, Valley East, Copper Cliff, Levack and Wahnapiatae. Although many of these locations have their own 'town centres', Downtown Sudbury acts as the shared centre that is common to all of Greater Sudbury's 157,000 residents. Maintaining a healthy Downtown Sudbury reflects positively on all 14 of Greater Sudbury's communities.

A City of Excellence

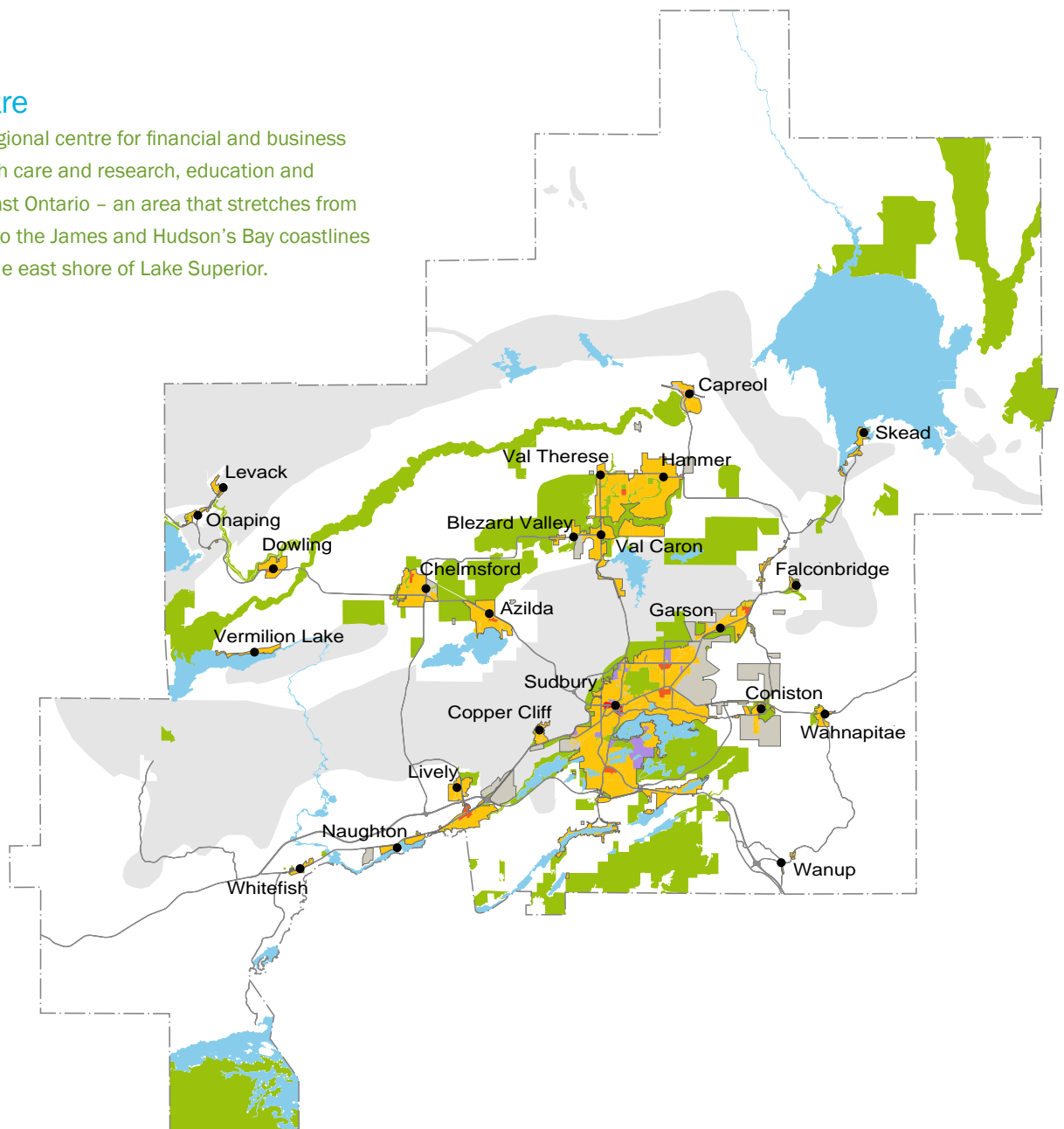
Over the years, Greater Sudbury has successfully diversified its mining sector and is now considered to be a world-leader in mining innovation. In recognition of its re-greening efforts, the city is now recognized world leader in environmental restoration. Since 1979, the community has planted nearly 9 million trees to re-green 3,350 hectares of land harmed by past mining practices. The City is also an emerging leader in the health care sector, with expert care provided in cancer treatment and research as well as seniors' health care.

A Regional Centre

Greater Sudbury is a regional centre for financial and business services, tourism, health care and research, education and government for Northeast Ontario – an area that stretches from the French River north to the James and Hudson's Bay coastlines between Quebec and the east shore of Lake Superior.

A City of Lakes

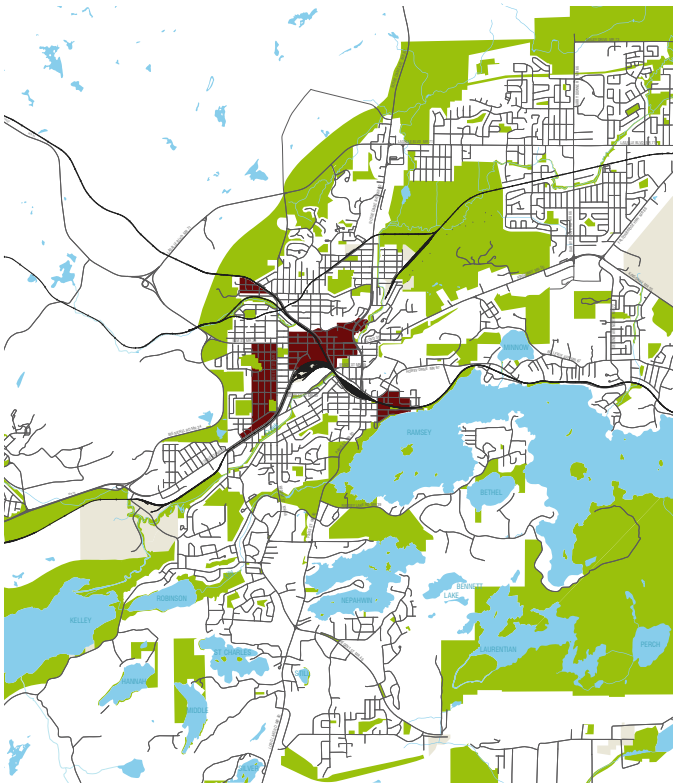
In contrast to its industrial landscapes, Greater Sudbury is also a city of lakes. There are approximately 330 lakes that are at least 10 hectares in area within the city limits. The largest of these, Lake Wanapitei is 13,257 hectares in area, making it the largest city-contained lake in the world. Lake Ramsey is the most central lake and a showpiece for the Downtown.



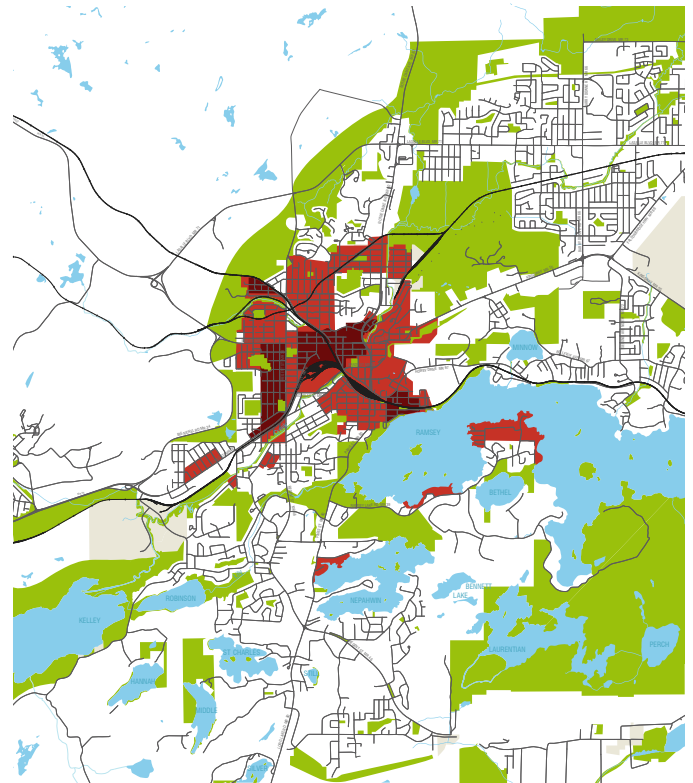
Growth Pattern of the Community of Sudbury

Downtown's history can be traced back more than 125 years to the plan to connect a newly-formed Canada with a transcontinental rail line. This section traces the growth pattern of the community of Sudbury over the last century, highlighting its evolution from a construction camp to an urban metropolis. Downtown Sudbury is central to this story and remains the urban centre for the region.

Sudbury's downtown got its start in 1883 as a camp for workers building the main Canadian Pacific Rail (CPR) line and a branch line. At this time, the rich minerals embedded in the Sudbury Basin were discovered. This discovery was soon followed by large scale mining activity that drove demand for land to build new homes and businesses. The CPR responded to this demand by creating the Plan for the Village of Sudbury in 1887. This Plan placed the railway at the heart of the village and imposed a fine grained network of urban streets, blocks and lots on the shield landscape. Sudbury grew quickly in its first 40 years. Growth was fuelled by demand for nickel and continued investment in regional rail and road transportation and communications (telephone) infrastructure.



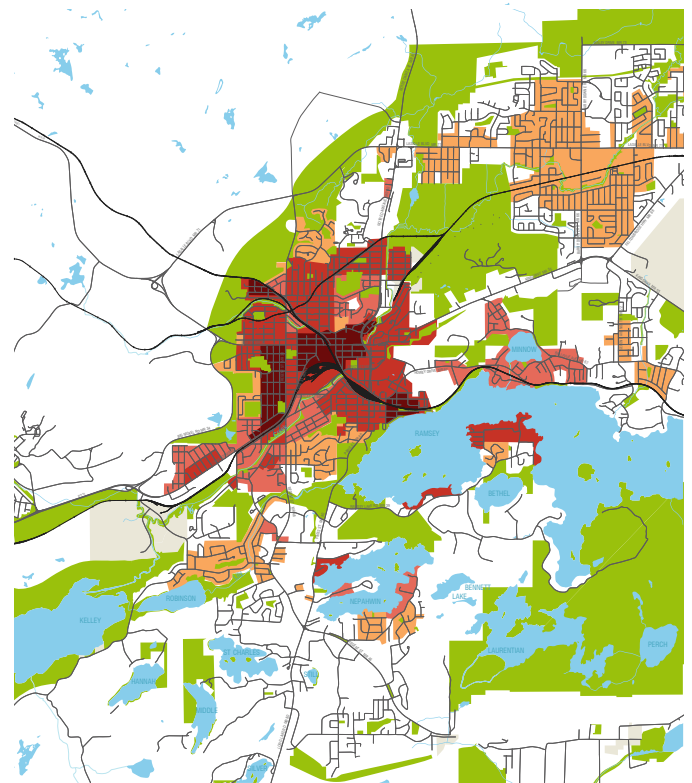
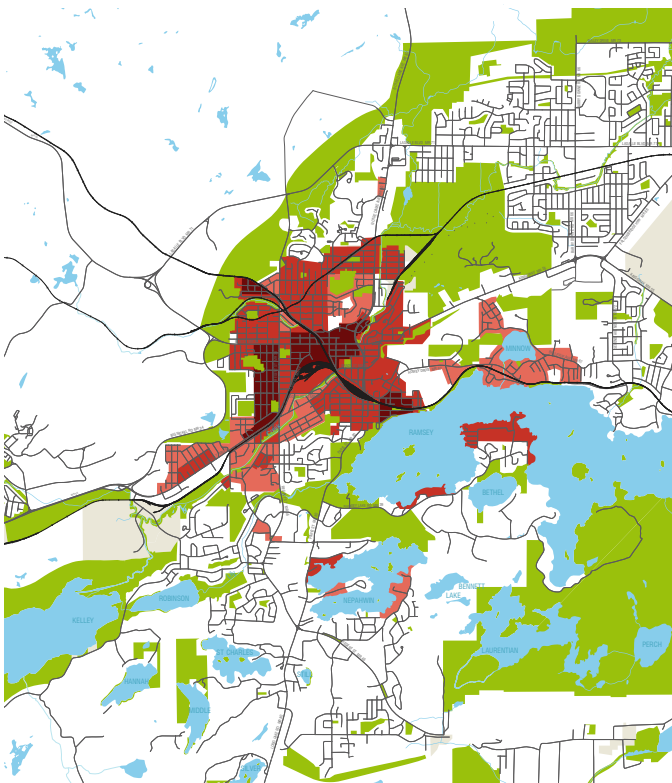
year 1901 /sudbury ■
population 2,027



year 1921 /sudbury ■
population 8,621

After the World War Two, growth began to spread out beyond the city limits following major roads such as the Kingsway, LaSalle Boulevard and Paris Street. By the end of the 1950's, Sudbury's urban structure was changing radically. Like in many other cities at that time, the relatively lower land costs outside the city and increased automobile ownership saw the growth spill out beyond Sudbury's city limits into the surrounding townships. In the mid-1950's, the New Sudbury Shopping Centre was built at the corner of Barry Downe Road and LaSalle Boulevard in the suburbs. Major retailers, attracted by new buildings, availability of car parking and easy access, migrated from the Downtown to the suburbs.

In the 1960's, Sudbury responded to this challenge by planning for a better future for its Downtown. Through urban renewal, it would comprehensively redevelop 60 acres of its most blighted areas on the north end of Downtown, replacing them with a new system of streets and blocks, parks and open spaces and residential uses. It would also build a new urban mall there, and a civic centre on two city blocks in the southern end of the Downtown. These plans took shape in the 1970's.

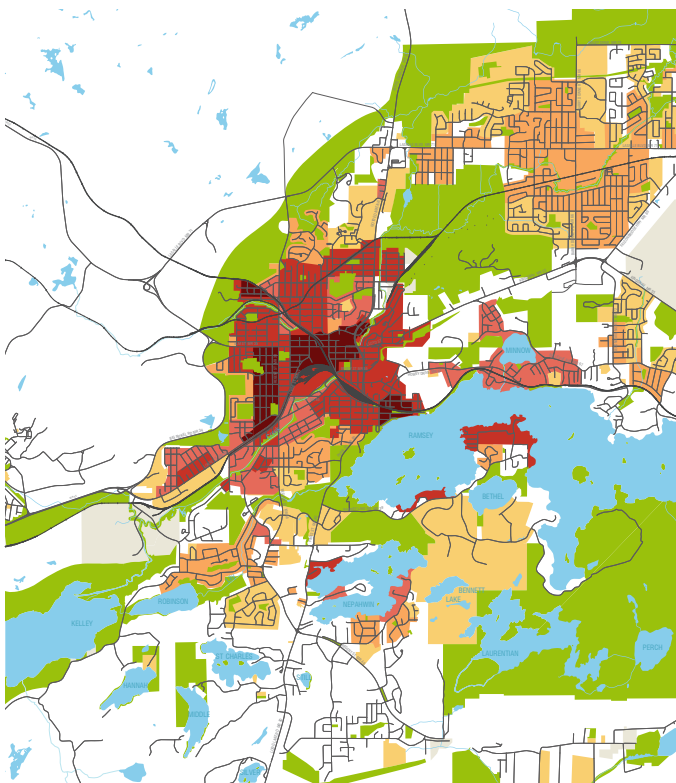


year **1941** /sudbury ■
population **31,888**

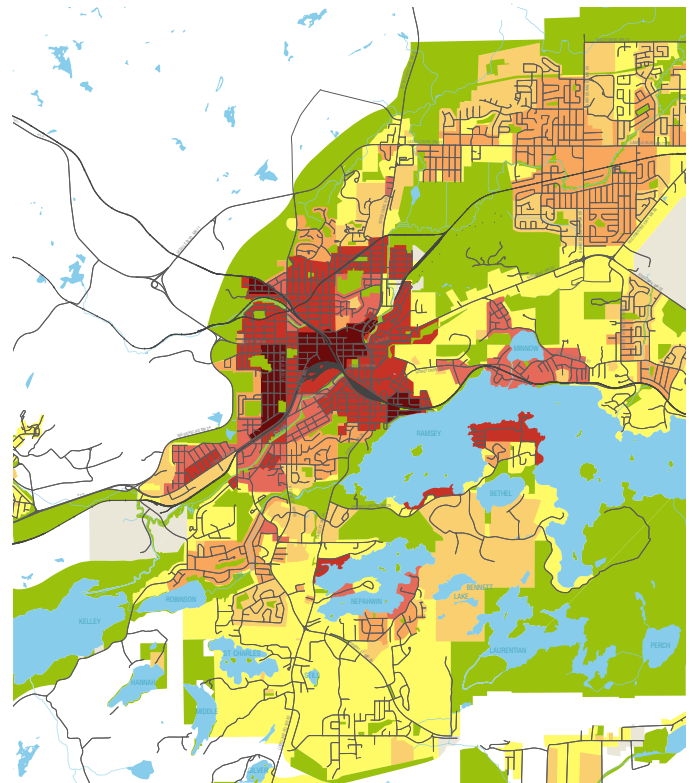
year **1961** /sudbury ■
population **80,120**

Today, the downtown area remains a major centre in Greater Sudbury, encompassing 92.5 hectares, including the Central Business District and areas east of Paris Street and west of the railway tracks. Downtown is the centre of government services, financial services, retail, sport and entertainment uses, community uses, arts and culture, and institutional uses

Today, the traditional downtown remains centrally located in the heart of the city's geography. As presented to the right, the downtown is ringed by a series of economically and socially important assets, including a wealth of post secondary educational institutions, important health care hubs (including three hospital complexes), regional shopping, entertainment and tourist destinations, and Greater Sudbury's signature lakes and landscapes.

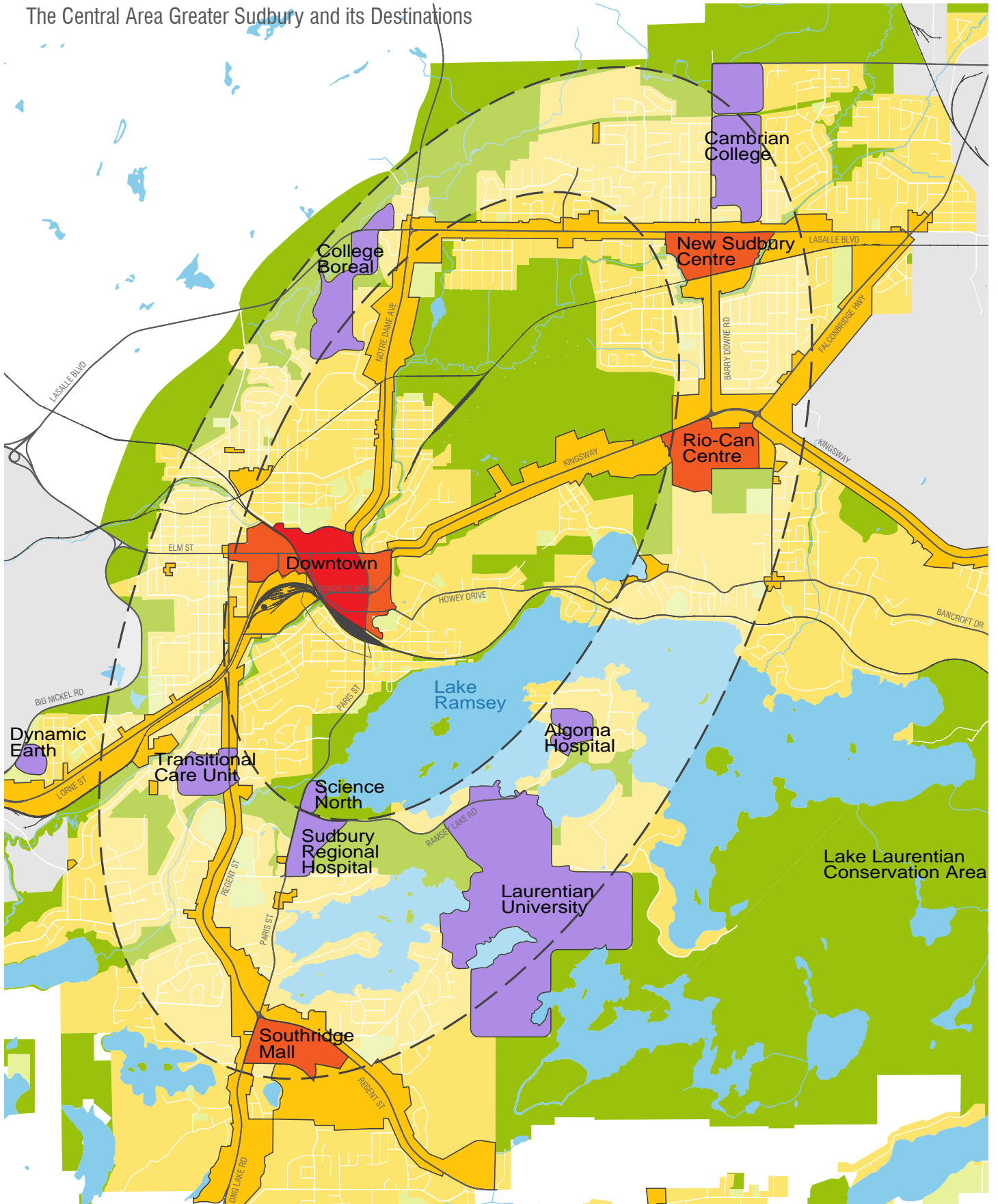


year **1981** /sudbury ■
population **91,829**



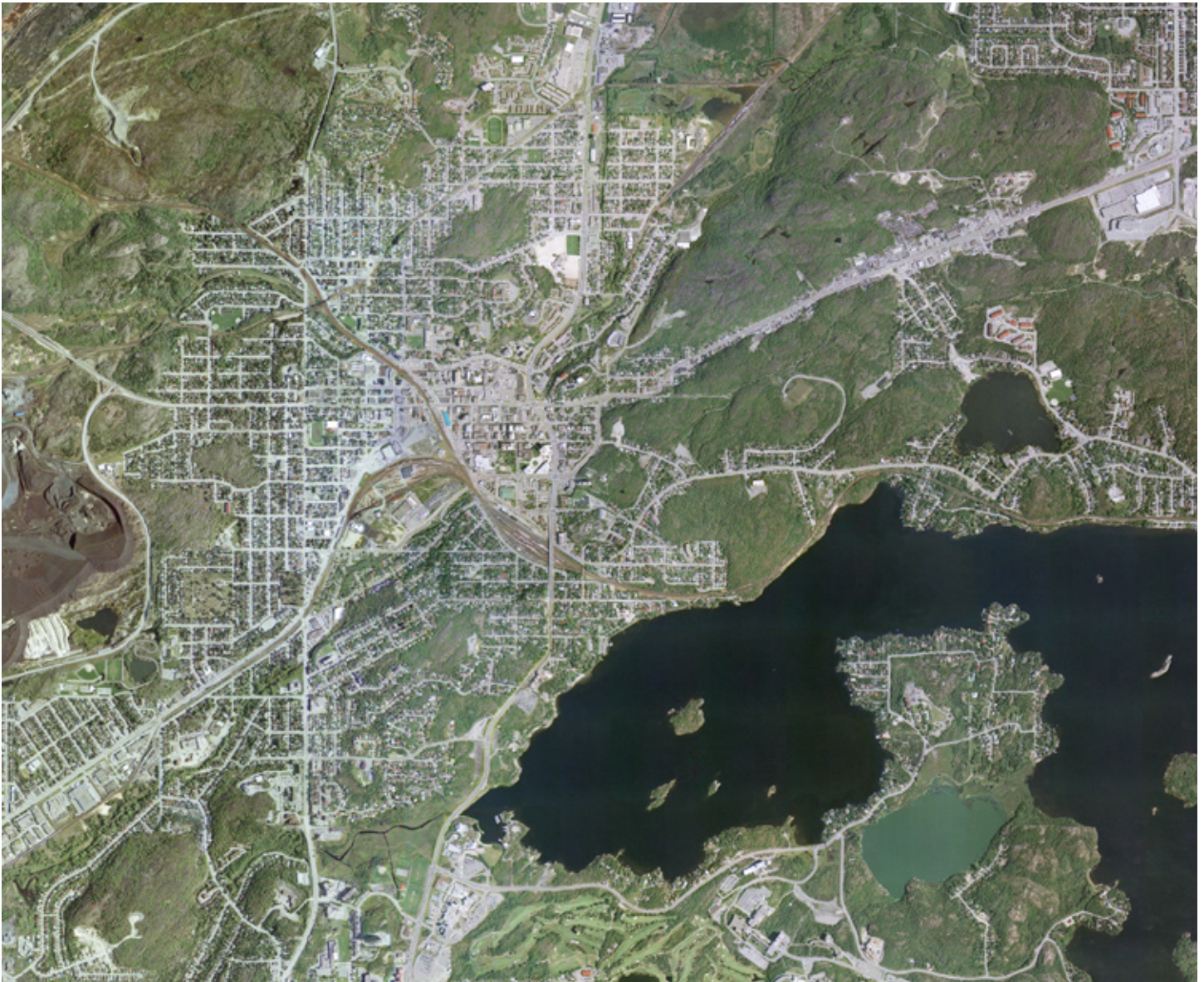
year **2006** /greater sudbury ■
population **157,857**

The Central Area Greater Sudbury and its Destinations



The Study Area

Downtown Sudbury is Greater Sudbury's first neighbourhood. It is the historic core and centre of government services, financial services, retail, sport and entertainment uses, community uses, and arts and culture. It is where people live, work, shop, worship, recreate and celebrate. It is a key tourism focal point and important economic engine. Its image defines the character of Greater Sudbury. Its health is crucial to Greater Sudbury's future economic competitiveness and success.



The core study area for the Downtown Master Plan is represented by the dashed line below. Triangular in shape, the core study area is bound by Ste. Anne Road to the north, Paris Street to the east and the rail corridor to the west. Although these streets form the boundary of the core study area, the influence of the Master Plan will extend beyond these boundaries. As such, the wider

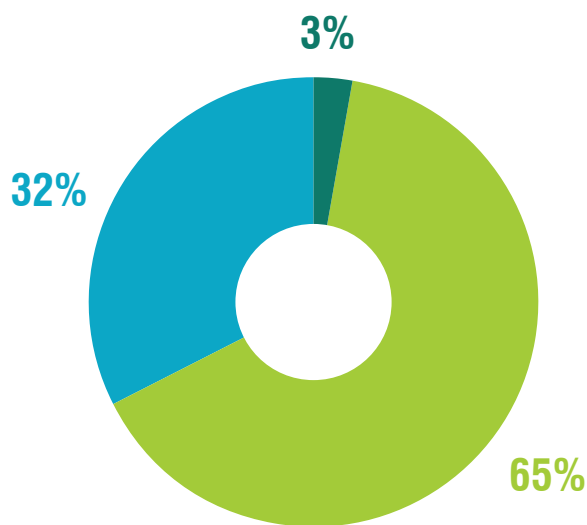
'area of influence' is shaded in yellow and includes the mixed use Cedar-Larch neighbourhood to the east, the Rail Lands to the south and the neighbourhoods to the north that are immediately adjacent to the downtown. Also considered will be the gateway approaches to the Downtown along Notre Dame Ave, Elm Street, Paris Street, Howey Drive and the Kingsway.



The Study Area ● Area of Influence ●

Analysis: The Structure of Downtown

To produce a viable long-term plan for any community, it is important to first understand the physical, market and policy environments that influence the area. The following provides an overview of the Downtown's physical components that define both its existing character and its future opportunities. Understanding the layers that comprise the urban structure is the starting point for analysis of the physical form of the area and preparing responsive recommendations for how the area could evolve.

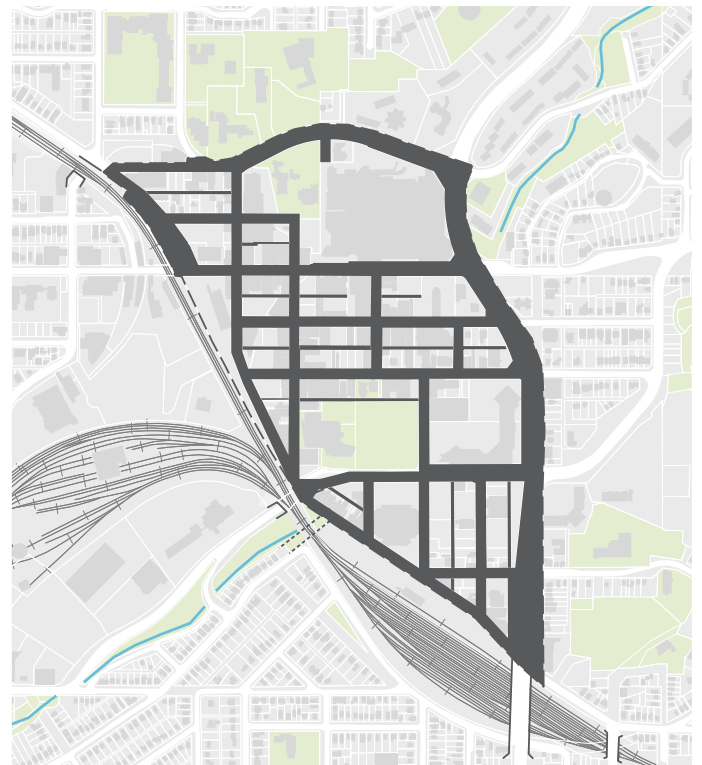


source: USI calculation

- road network = **32%** of the Downtown
- parks and open spaces = **3%** of the Downtown
- development parcels = **65%** of the Downtown

Composition

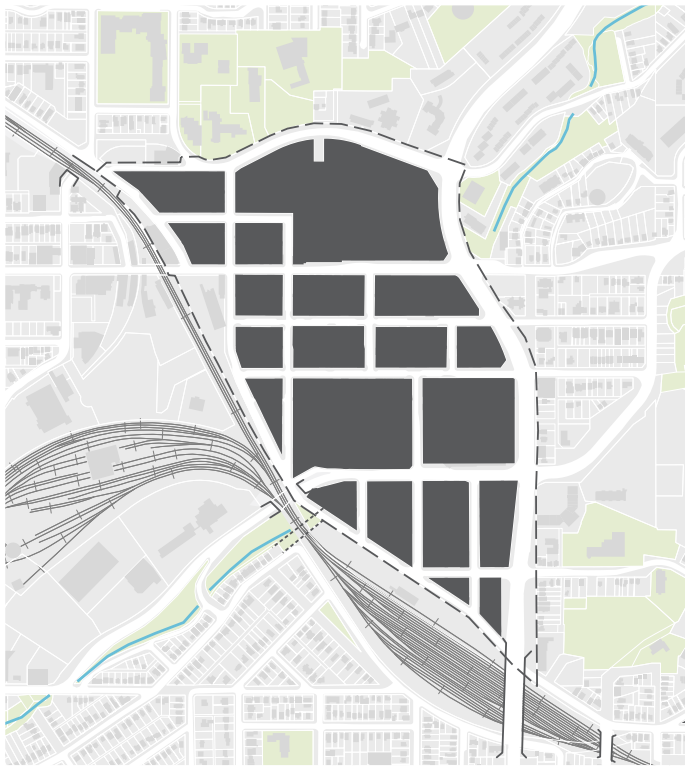
The building blocks of the downtown can be defined as streets, buildings and open spaces. The graph above illustrates the split between these three dominant components of Downtown Sudbury. Not surprisingly, development parcels demand the most significant percentage of land area. This is followed by the road and street network, which covers almost one-third of downtown's land. The above calculations highlight the under representation of parks and open spaces in the core, representing only 3% of land coverage.



Road Network

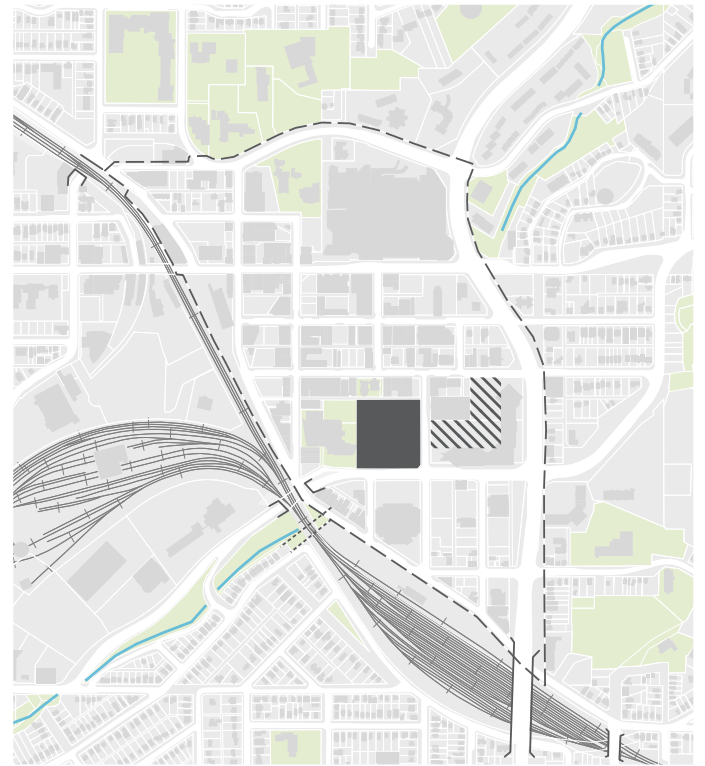
The road network serving the downtown is based on a traditional grid-system. Over the years, as the downtown has evolved, large portions of the grid-system have been removed. This has effectively created gaps in the movement system. Where the grid system remains, movement within the network is good.

As the city has grown, so has the demands on its road network. Today many of the streets that define the downtown act more as busy arterials than downtown streets (Elm, Ste. Annes, Paris). This creates challenging conditions for businesses and people.



Development Parcels

The road network defines a series of parcels where development exists. Where the traditional street grid remains, parcels tend to be smaller in size. Smaller parcels typically allow for more flexibility in development and allow the area to more easily meet changing urban trends (retail, office, residential). Where the street grid has been removed, larger 'super parcels' have resulted. These super parcels have often been the result of previous revitalization initiatives, such as Metro Centre, Tom Davies Square or the Sudbury Arena. Larger parcels are more difficult to redevelop and often require sub-division.



Parks & Open Spaces

By their very nature, downtowns are urban spaces built around bustling streets supporting a mix uses housed in a variety of building types. Downtown tends to be the most dense part of the city. As such, the relief and amenity offered by parks is one of the essential components of healthy downtowns. In Downtown Sudbury, there is a notable absence of park space. Only 3% of the downtown land area is comprised of park space. Furthermore, although Memorial Park and Tom Davies Square are centrally located, neither space is easily accessible or highly visible when in the downtown.

The Physical Elements

Downtown Sudbury is comprised of a large number of different, yet inter-related structural components. These components may be viewed as the layers of the city. When combined, they shape the physical form of the Downtown Sudbury.

This section presents each of these component, clustering them under the structuring element that they support:

Road Network

- > Street Hierarchy
- > Transit
- > Cycling and Walking
- > Utilities
- > Parking



Development Parcels

- > Character Areas
- > Land Uses
- > City Lands
- > Built Form Heritage
- > Street Wall



Open Spaces

- > Natural Heritage
- > View and Gateways

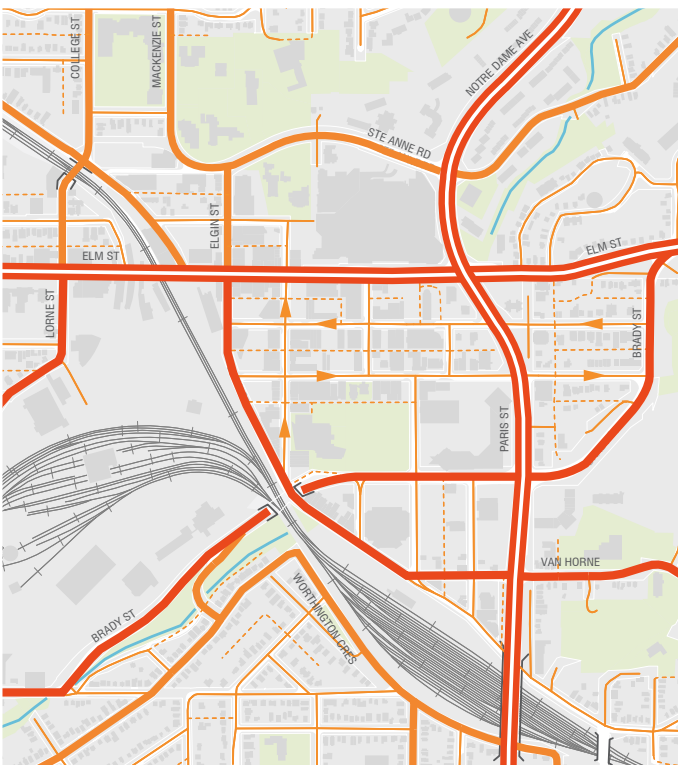


Street Hierarchy

Compared to many downtown areas of cities similar in size to Greater Sudbury, the transportation system in downtown Sudbury works quite well. As presented above, the street hierarchy is relatively clear, with a downtown loop formed by the primary arterials of Paris Street/Notre Dame Avenue and secondary arterials of Elm Street and Elgin Street. Within the downtown, one-way streets are present on Larch Street and Cedar Street, and along the portion of Durham Street between Elgin and Elm streets. The one-way streets do not provide a continuous connection through the City and hence do not carry significant volumes. In general, the vehicular level of service in and through Downtown Sudbury is good, with few locations that have recurring congestion issues.

Additional observations:

- Large and fast moving streets surround and isolate the Downtown. These should be better balanced.
- Two large streets (Brady and Elm) dissect the Downtown into three disconnected sections. Connections between these sections need to be improved.
- A laneway system is used extensively throughout the Downtown. This is a good system, but could be improved.



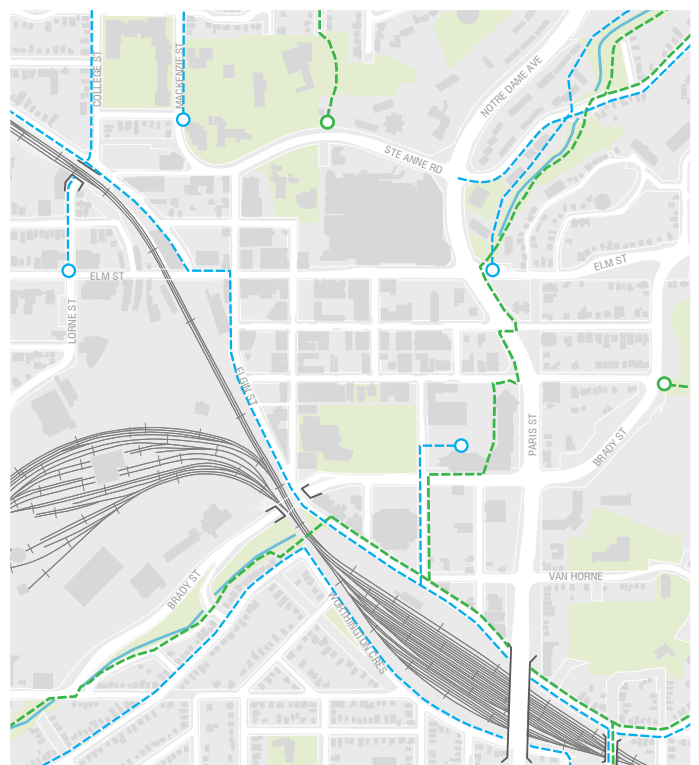
- major road
- collector road
- local road
- laneway

Cycling and Walking

The Downtown is difficult to access by foot or by bike. Although the areas surrounding the Downtown benefit from dedicated cycling routes and walking trails, many of these terminate when they enter in proximity to downtown. No routes traverse through the heart of the Downtown and only one cycling and one walking trail edge the periphery of the core. Several barriers hinder the introduction of a more complete network, including oversized roads, rail corridors, pedestrian subways and the city's topography. Opportunities exist to provide additional routes through the downtown as well as to better connect and integrate existing routes into a more complete network.

Additional observations:

- Although cycling and pedestrian routes are present, the network breaks down at the interface with major roads and the connections to the surrounding neighbourhoods. In these locations, it is difficult to access the downtown by foot - ie. Brady underpass and crossing Paris Street.
- The public realm condition along many pedestrian routes could be improved.
- Access to and through the Downtown for those with mobility issues is challenging (due to pathways, paving methods, etc)



- trails
- cycling routes

Transit

The Downtown is generally well served by bus transit, namely the Greater Sudbury Transit. The transit terminal is an important asset for the City that delivers 15,000 people to the downtown per day. The terminal is currently undergoing improvements. Rail travel to Greater Sudbury is challenging. The main Via station is outside the downtown on LaSalle Boulevard. A small station is located with the downtown on Elgin Street. This station provides infrequent service on the Sudbury-White River line. Rail lines in the downtown are heavily used by CP for freight.

Additional observations:

- Safety, security, and maintenance of the transit centre could be improved.
- The Via Station is underutilized and could be re-purposed.
- Regional train service does not serve Downtown.
- Connectivity to and from the western side of the Downtown is limited by the presence of the CP rail yards and rail lines that act as significant barriers.
- Freight use creates traffic, noise, odour, and vibration issues along Elm and Elgin Streets.
- Improving inter-regional rail service would require either 26km of new rail tracks or a dedicated Sudbury-Toronto service.

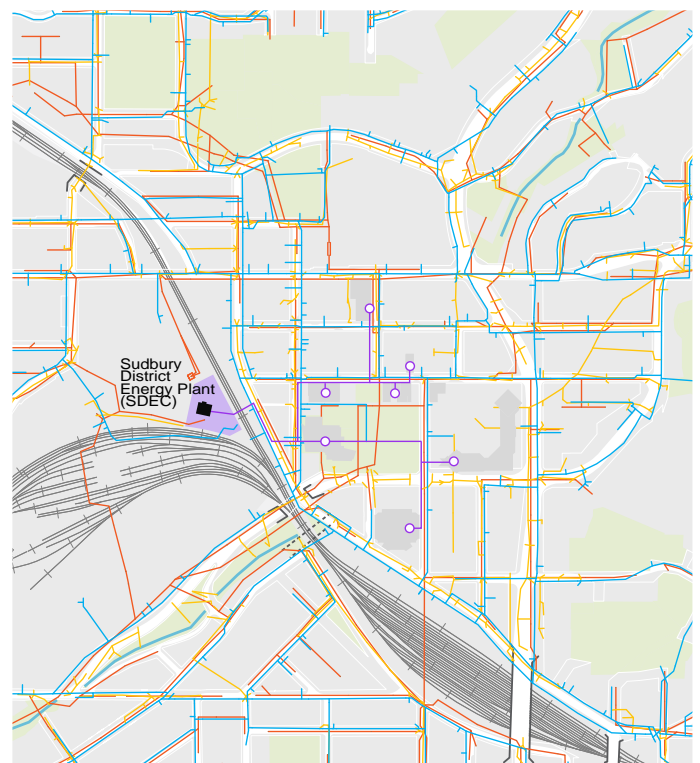
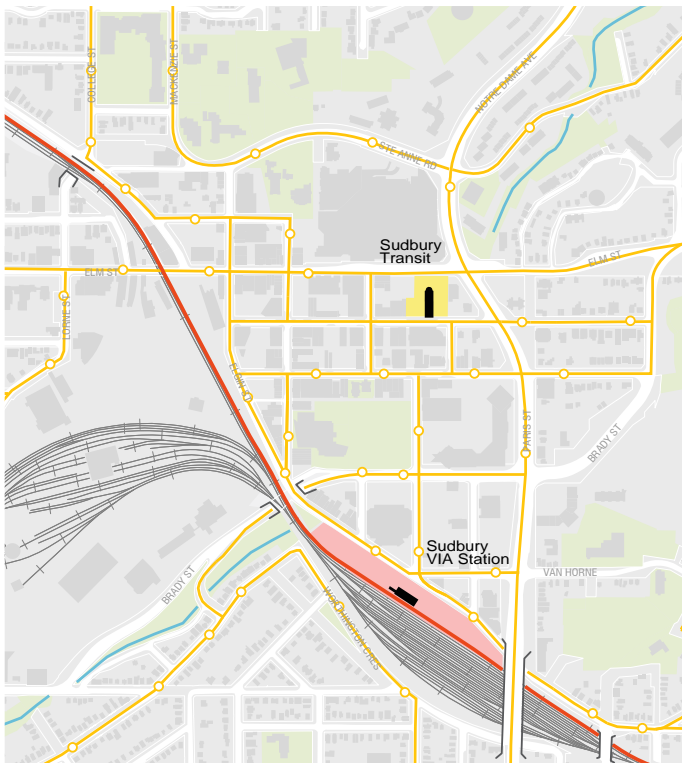
Water, Waste Water and Utilities

Generally, existing water and wastewater facilities are operating under capacity and able to meet current peak flows. With the exception of a few areas, the existing infrastructure system has capacity to meet forecasted growth within the City. In addition to traditional municipal infrastructure, there are also opportunities to expand on the success of the Sudbury District Energy Cogeneration Plant. The District Energy Plant currently provides heat to 7 buildings in the core, but it is understood that it has capacity to serve additional users. A separate facility, located at the Sudbury Arena, provides cooling for 3 buildings.

Additional observations:

Although current provision is adequate, for the Downtown to support long term growth may require improvements to the following areas:

- Replacement or expansion of existing treatment plants and new facilities;
- Reduction programs;
- Upgrades to pump stations and sewer collection systems;
- Improvements to Water and Sewer models.

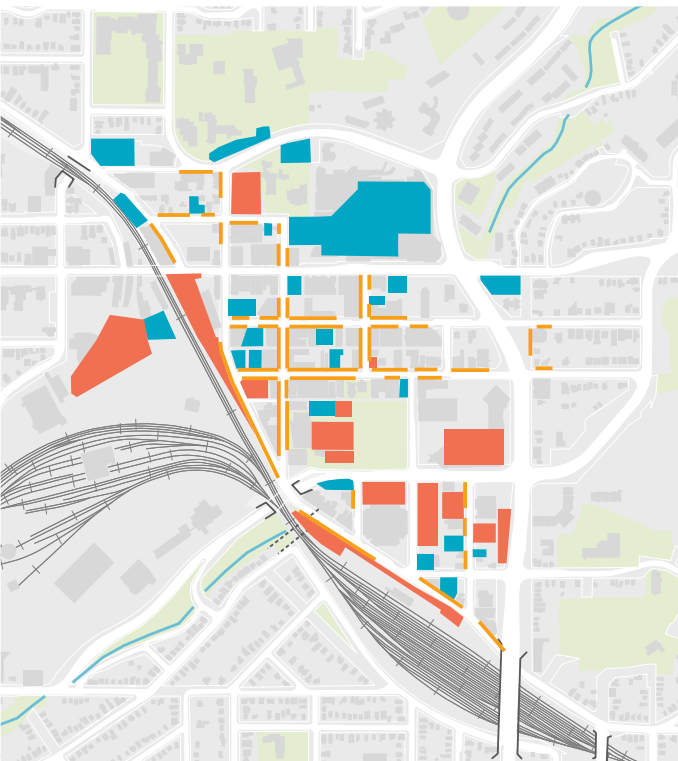


Parking

There are nearly 3,800 off-street and on-street parking spaces serving the Downtown: approximately 305 on-street, 1,574 off-street municipal and 1,921 private parking spaces. In the downtown, the majority of parking is provided by surface parking lots that are scattered throughout the Downtown (with a high concentration to the south and west). The proliferation of surface parking lots in the downtown creates gaps in the urban fabric of the core and contributes to some concerns around personal safety. The recently completed Parking Study found the overall parking systems appeared to have sufficient capacity to meet current parking demands in Downtown Sudbury.

Additional observations:

- The high concentration of surface parking across the downtown contributes to a lack of critical mass in the core.
- The current supply of parking has decreased with the redevelopment of the lot along Elm St. and Froot Road.
- There may potentially be a long term need for a structured parking facility in the downtown. Since parking demand growth estimates indicate future demands are likely to be highest south of Brady Street, consideration should be given to planning for structured parking in this vicinity.



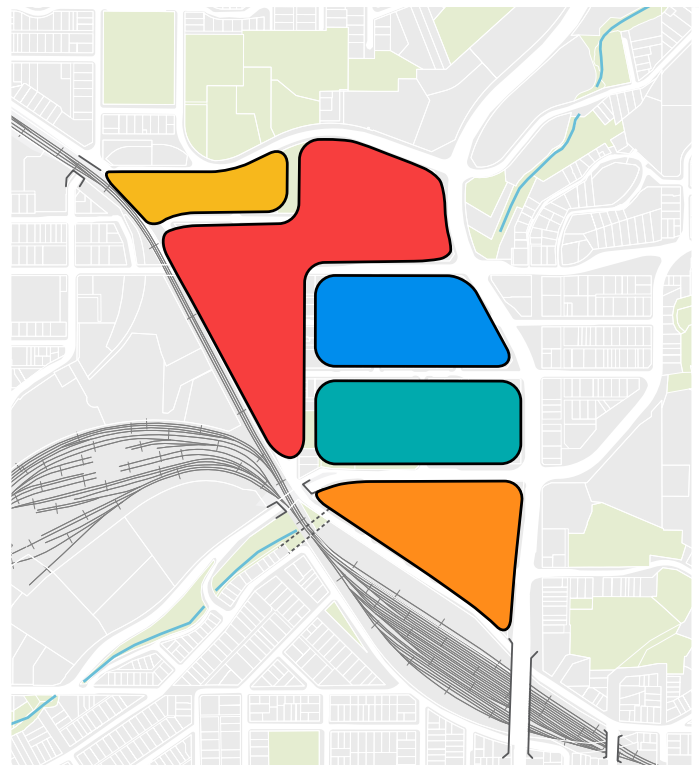
— on street metered parking (305 spaces)
— public parking lot (1574 spaces)
— private parking lot (1921 spaces)

Character Districts

Downtown Sudbury is comprised of a series of sub-districts, each playing a different role and supporting a distinct character. The retail district is structured along Durham and Elm streets. These traditional main streets, coupled with the Rainbow Centre, act as a shopping and dining destination. The office district, home to purpose built office buildings and thousands of jobs, is situated internally along Larch, Cedar and Lisgar streets. The arts and entertainment district anchored the Arena, the Theatre and lower Elgin is located to the south. The civic and institutional district has a strong presence on Paris Street and extends across Minto Street to include Memorial Park and the community services on Durham and Larch. The residential zone is isolated in the north.

Additional observations:

- Downtown living is under-represented in the core and requires a strategy to be put in place if this ambition is to be realized.
- Although a traditional main street, Elm Street needs support to thrive as a retail street. The Rainbow Centre is an important destination, but it is not well integrated into the downtown and requires a better interface with the city.



— living
— shopping
— working
— civic & institutional
— arts & entertainment

Uses

Downtown Sudbury contains a broad mix of uses, including retail, office, arts & culture, civic, community and institutional. Although a thoroughly mixed-use area, the focus of the downtown is very much on employment with more than 6,000 people working in the core. In contrast, only 600 people live downtown. Creating a more equitable balance between living and working in the Downtown can help deliver significant benefits to the city, including a more stable downtown, greater localized spend, an expanded tax base and more people on the streets to help create a positive environment for the downtown. In addition to the uses present day-to-day, the Downtown is also home to more than a dozen events and festivals throughout the year.

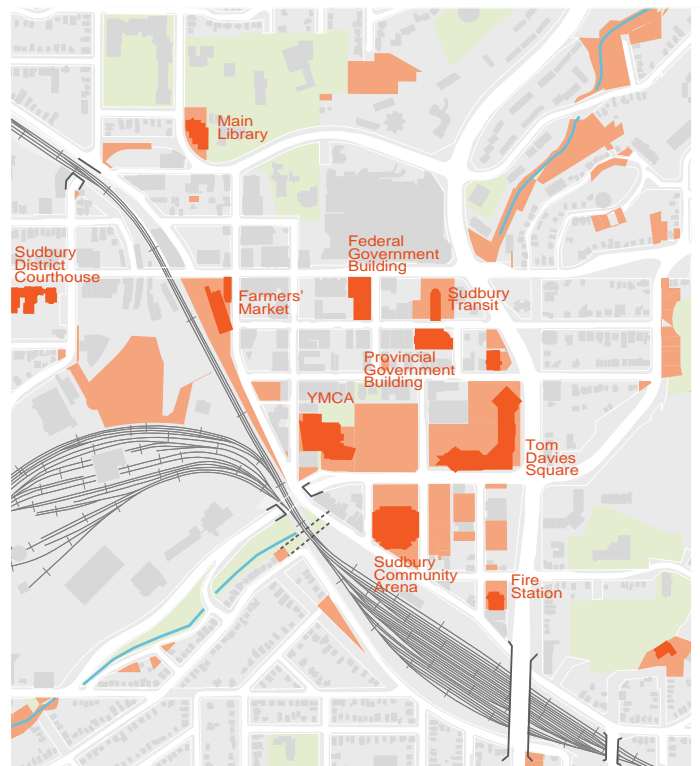
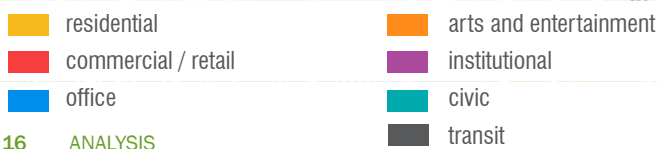
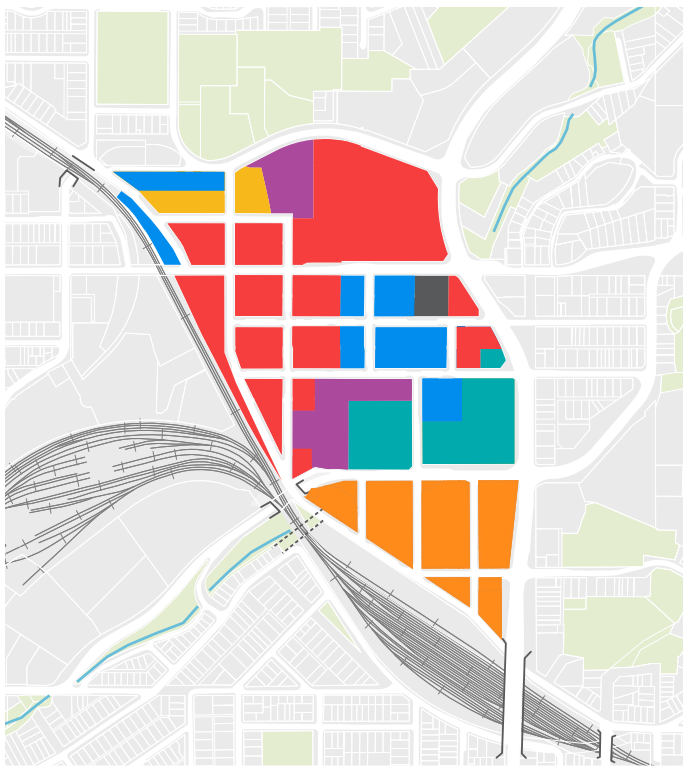
Additional observations:

- Transit is an important use for the core, but the site is underutilized and could be better integrated.
- Although the Downtown is mixed use, a better blend of uses between districts would help the Downtown function as a more integrated destination.
- Stronger residential representation should be a priority.
- Downtown is underprovided by conference, hotel, Class “A” and large format office space.

Publicly Owned Lands

A significant amount of land in Downtown Sudbury is controlled by public sector interests. All levels of government - municipal, provincial and federal - have land holdings. This ownership offers significant opportunities for partnership.

On its own, the City of Greater Sudbury controls an adequate amount of property to leverage additional investment and make meaningful change in the Downtown.



public lands

Heritage

The Downtown is the oldest neighbourhood in Greater Sudbury. As such, it supports a large number of historic buildings. However, over the years, as the city has evolved and the role of downtown changed, many of Sudbury's oldest and most historic buildings have been demolished, as shown below. At present, only three buildings in the Downtown are formally protected. Preserving the additional heritage buildings of genuine value should a priority for the City.

Additional observations:

- The story layers that define Greater Sudbury include, the First Peoples' Story, the French / Jesuit settlements, the English story, the clear cutting of the first growth White Pine forests to supply wood for the rebuilding of Chicago, the Railway story, the CPR 1887 plan, growth and prosperity, the mining story, the back story to Greater Sudbury being the capital of the north. Methods must be developed to tell these stories in the Downtown.
- new commercial, educational, institutional and residential uses should be directed some of the higher profile heritage sites in the Downtown to give them a contemporary and functional use. This may require subsidy.

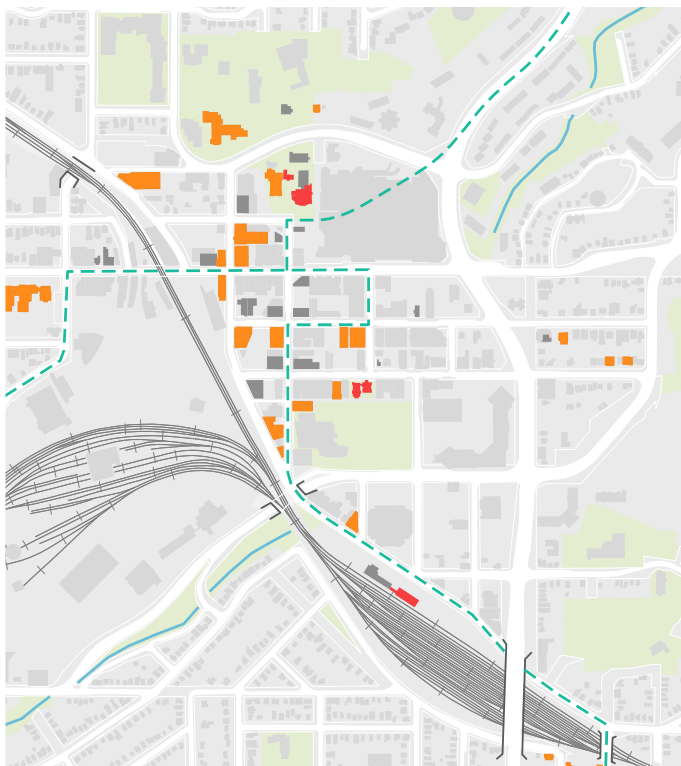
Street Wall

Downtown Sudbury is structured along key streets, namely Elm, Durham, Larch and Cedar. These streets support continuous commercial frontages that generate a positive pedestrian experience. It is important to note, however, that these streets are internal to the Downtown. This results in the best image of the downtown being visible only from an internal perspective.

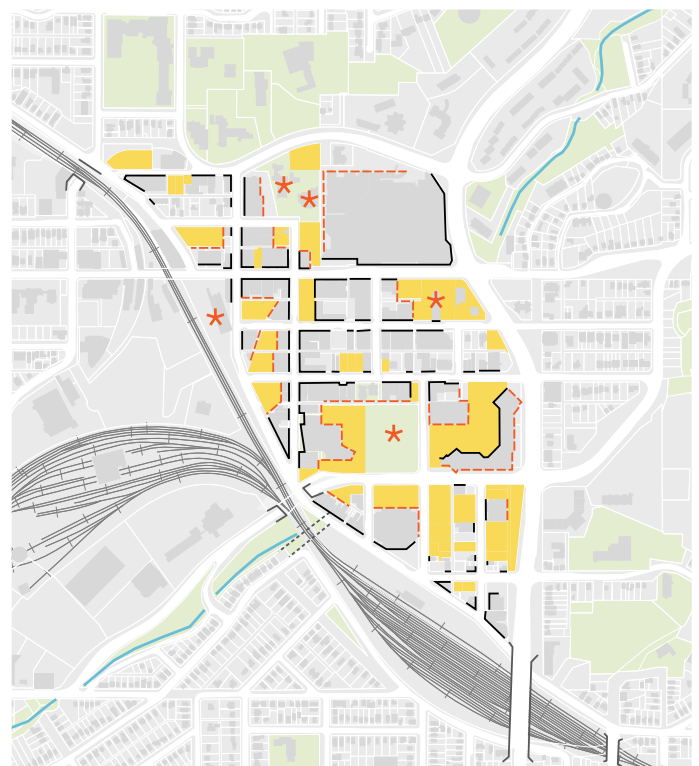
In contrast, when viewed from an external perspective (from Paris, Ste Annes, Elgin and Brady), visitors generally see the backsides of buildings that are characterized by blank walls, service area and surface parking. This results in both a poor impression of the Downtown as well as a poor pedestrian experience on the ground.

Additional observations:

- Some Downtown's most important destinations, such as Memorial Park and Le Carrefour francophone, are flanked by the backs of buildings. This makes these spaces feel disconnected from the city and to safety concerns.
- Many locations in the Downtown are characterized by an inconsistent streetwall supporting frequent breaks and gaps in the urban fabric.



- protected buildings
- heritage assets
- demolished heritage assets
- original streetcar alignment



- building frontage
- building back
- vacant or underutilized land
- * downtown destination

Natural Heritage

Greater Sudbury's well recognized rugged northern landscape reaches right into the core and touches the edges of the Downtown. Rock outcrops edge two sides of the downtown, creating a dramatic setting for the Downtown. The raised topography surrounding the core creates a 'bowl effect' for the Downtown where it is fully contained by the surrounding raised landscape. Although creating a beautiful setting, the topography also creates challenging accessibility and connectivity issues when entering the downtown from surrounding communities. In addition to the physical landscape, the Junction Creek and Nolin Creek waterway systems run under the downtown and requires on-going ecological repair.

Additional observations:

- Greater Sudbury is a Winter City, every effort must be made to make the downtown easier for people to access and move about the core in the winter months.
- Greater Sudbury is a Water City characterized by the large number of lakes within its borders and the creek system. There is no reflection of this downtown. This quality needs to be reflected more strongly in the core.

Views and Gateways

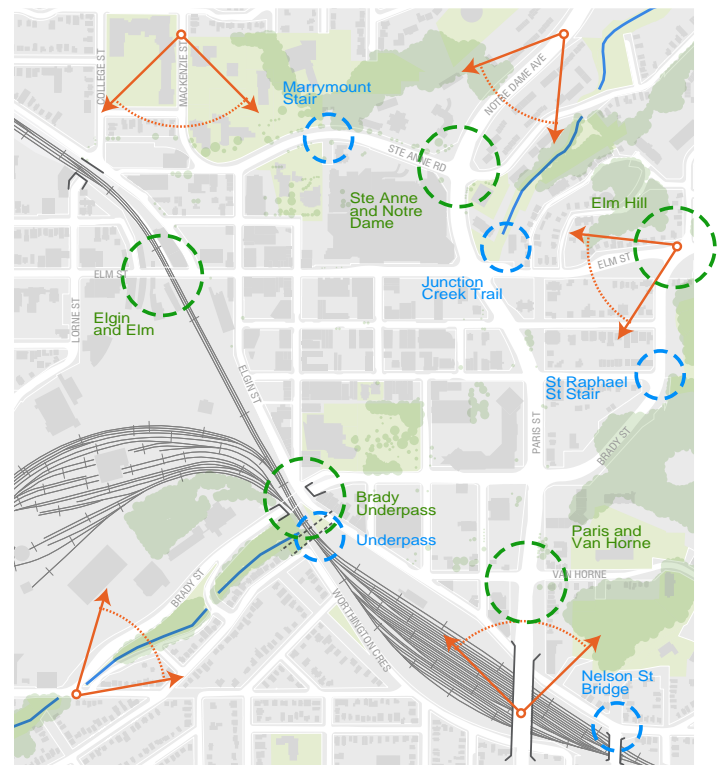
When entering the Downtown from outside, the topography of the city provides several opportunities for creating captivating civic views and a memorable entry sequence. These views capture the best of the downtown and contribute to creating a positive urban experience. However, at the moment, other than the Bridge of Nations, the primary gateways are not fully celebrated. Many are marked only by parking lots or vacant sites. At the pedestrian scale, many of the downtown entry points are challenging to navigate and often lead to under utilized sites, such as parking lots.

Additional observations:

- The downtown is in a bowl surrounded by hills and punctuated by an iconic water tower, can this setting be enhanced, defined even made more dramatic?
- Consideration could be given to protecting certain view corridors into and out from the Downtown.



- TTTT major topography
- █ creek network
- - - original creek alignment



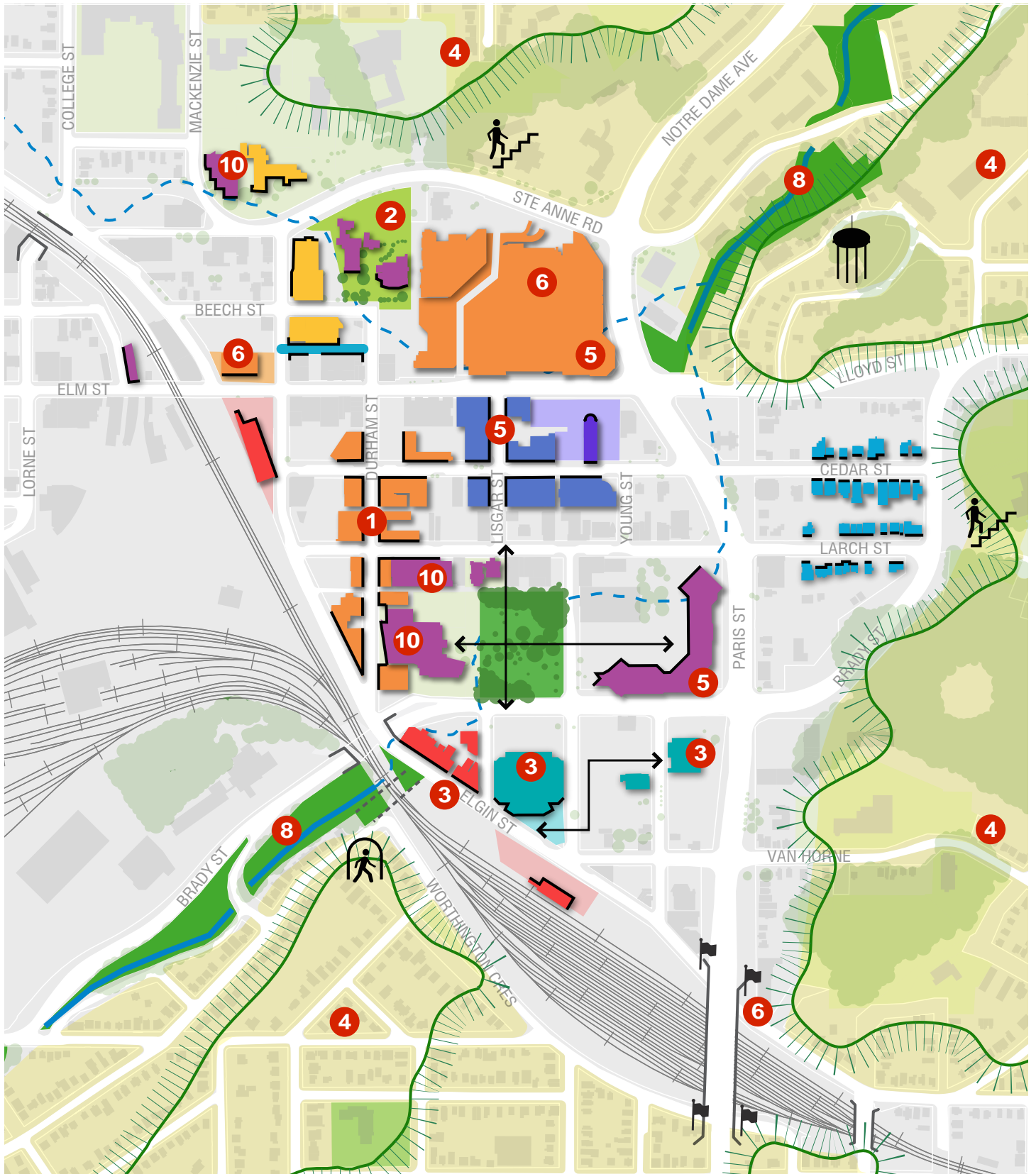
- primary gateways
- pedestrian gateways
- primary entry views



Analysis Summary: The Strengths

Below is a summary of the very best aspects of Downtown Sudbury. The Downtown Master Plan & Action Strategy will protect and enhance these existing strengths.

- 1 Durham Street is Greater Sudbury's 'Main Street'.** It is a wonderful example of a charming, well-maintained shopping street offering a good mix of independent shops and services. With some of Greater Sudbury's best restaurants and cafes, Durham is a destination for the whole city. Parts of Larch St., Cedar St. and Elgin St. also help contribute to the 'authentic' feel of Downtown Sudbury.
- 2 Downtown Sudbury acts the hub of the First Nations and Franco-Ontarian cultural experience.** The strong presence of these groups in the Downtown has helped establish Greater Sudbury as the 'Centre of Culture' for these important and culturally rich communities. Few other cities can compete with Greater Sudbury for the richness of its cultural offer, much of which is hosted in the Downtown.
- 3 The Downtown is home to a vibrant cultural scene that draws thousands of visitors to the core every year.** Places such as Artists on Elgin, la Galerie du Nouvel Ontario, Sudbury Theatre Centre, the Townhouse, Arts North, Le Carrefour francophone, and the Art Gallery of Sudbury (amongst others) all contribute to this creative identity. The many festivals hosted in the downtown also work to keep Greater Sudbury's creative spirit strong.
- 4 The Downtown is ringed by a series of stable, healthy neighbourhoods.** These communities located within easy walking distance of the core are important support systems for the downtown. Residents who live in these thriving neighbourhoods use the downtown as their local shopping, recreation and support service centre.
- 5 With approximately 6,000 people working in the greater downtown area, Downtown Sudbury is one of the city's most important employment destinations in Greater Sudbury.** Already home to some of Greater Sudbury's best quality office buildings, the Downtown continues to successfully attract new employers, such as Hatch Engineering. As a regional capital, the Downtown is also an important centre for all levels of governmental employment.
- 6 Downtown Sudbury is getting better every year.** Both the public sector and the private sector are investing in making the Downtown look and feel better. The City is rolling out a new streetscaping initiative and upgrading the Transit Centre. The Rainbow Centre continues to renovate and attract new retailers. Vacant land is being converted to new business, like Shoppers Drug Mart, with more opportunities for re-development on the horizon.
- 7 The City and its public partners are important landowners in the Downtown.** Opportunities for the continued evolution of Downtown will be led by the redevelopment of vacant sites, some of which are in public ownership. This high level of public ownership means that the City can be an active partner in reshaping and improving the Downtown.
- 8 Greater Sudbury is famous for its rugged landscape.** This landscape reaches right into the Downtown and touches its edges, creating a beautiful backdrop that contains the Downtown. Other natural assets, such as Junction Creek and Nolin Creek, also help to make the downtown a unique mix of 'city-life' and 'the natural world'.
- 9 Downtown Sudbury knows how to throw party!** Home to almost a dozen festivals, the Downtown acts as one of the city's main stages for having fun. With some events attracting more than 30,000 visitors, these world class festivals keep Greater Sudbury fun and active. They generate the excitement that attracts thousands of visitors to the city.
- 10 The Downtown is the heart of the city and a communal meeting place for its citizens.** As such, the Downtown supports not just shops, restaurants, culture and jobs, but also important community services. Amenities like the YMCA, the Library, health services and the municipal and provincial buildings all provide critical services and help enrich the Downtown offer.



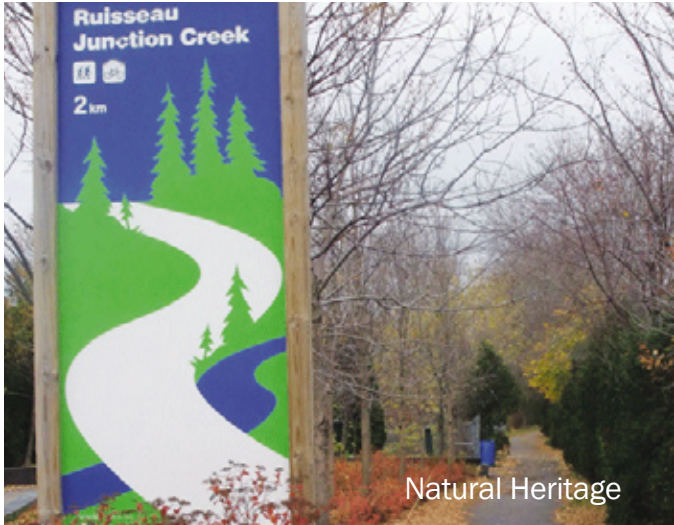
Downtown Sudbury: Your Strengths



Grass Roots Arts



Events & Festivals



Natural Heritage

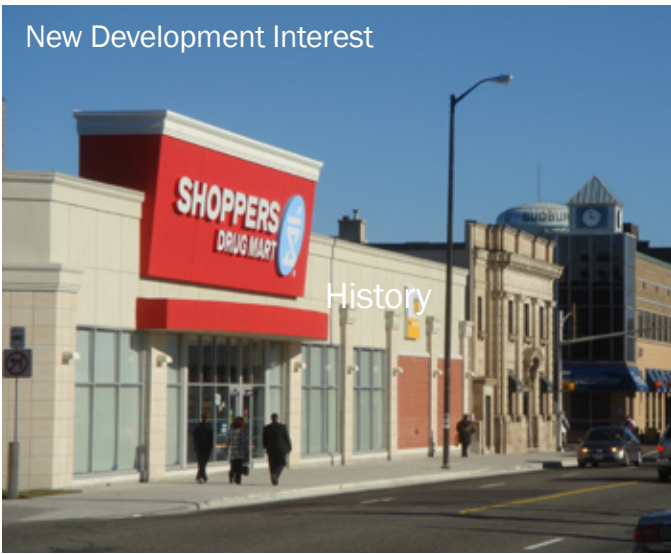


Investment in Your Public Realm



Cafe Culture

New Development Interest



History



History



Proximity to stable neighbourhoods



Cultural Heritage

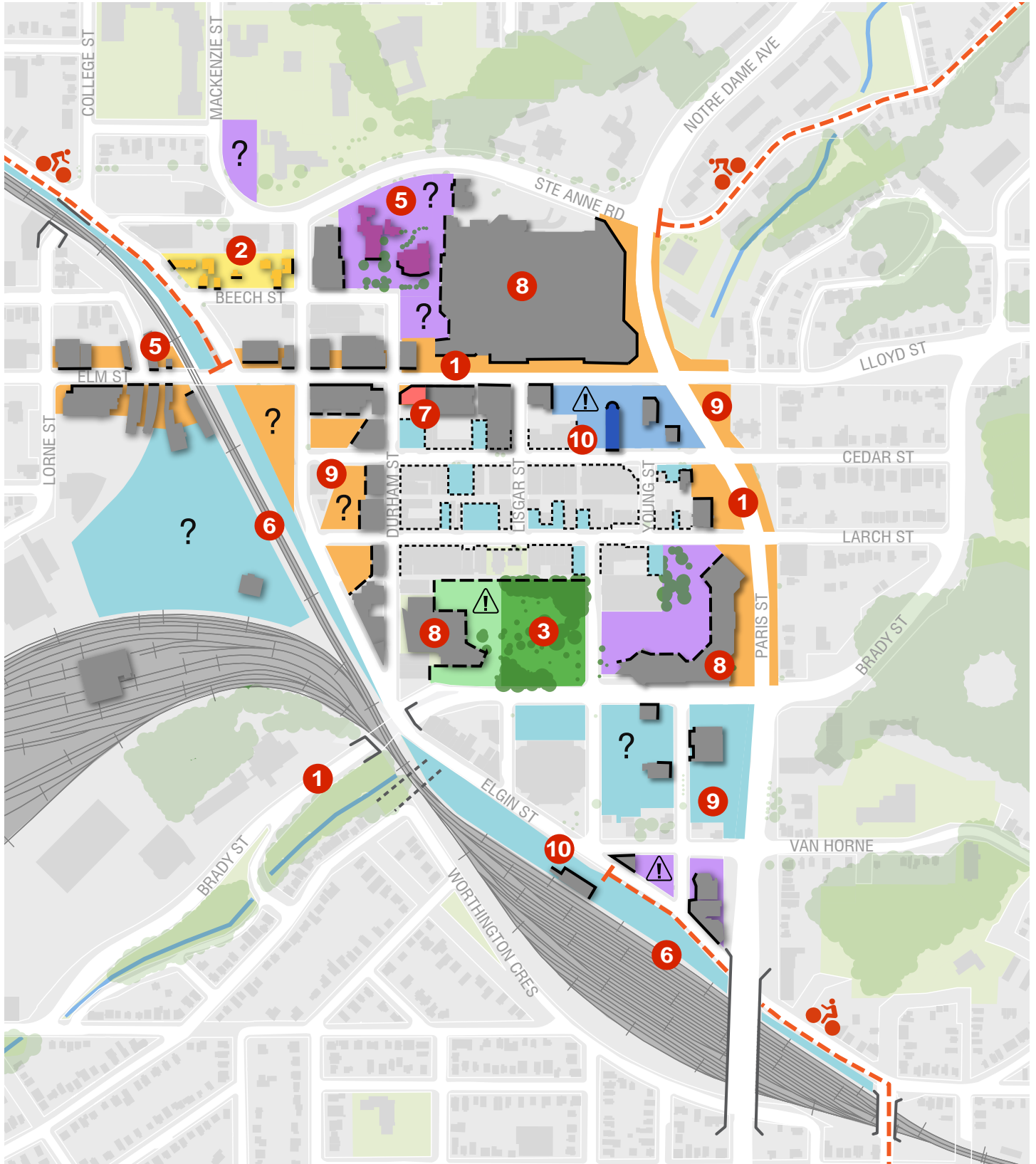


Diversity

Analysis Summary: The Challenges

Not everything in the Downtown is a success. Summarized below are a some of the Downtown's biggest challenges. The goal of the Downtown Master Plan & Action Strategy is to address these issues and to reposition the Downtown for a better future.

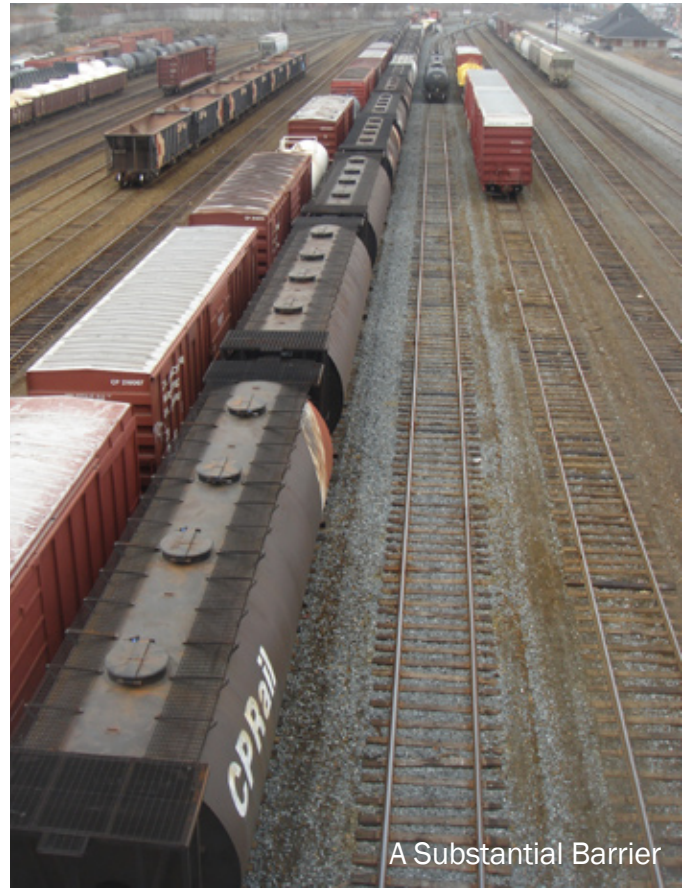
- 1 Big roads like Paris, Elm, Brady and Ste Anne's move a lot of cars, but create tough environments for pedestrians and cyclists.** These big roads also work to dissect the downtown into three disjointed districts. What can be done to make these mean streets more friendly and help to stitch the downtown back together?
- 2 People living in the downtown bring life to its streets and shops, creating activity and buzz.** This level of activity makes people feel that the Downtown is a safe place to be. However, with only 600 people living in Greater Sudbury's Downtown, the local residential population is under-represented and insufficient to generate an urban buzz. Downtown Sudbury has the opportunity to become a new residential destination.
- 3 Memorial Park is a wonderful green space in the very heart of the city.** However, this park is also the only green space in the downtown, resulting in an under-provision of usable park space in the core. Green spaces are critical components of urban centres, providing the setting for relaxation and active play. Parks also deliver important environmental benefits to urban centres.
- 4 For a downtown to be well used by its residents, the downtown must feel safe.** However, there are pockets of Downtown Sudbury that may at certain times of day feel unsafe. This results in the perception of crime and fear of crime negatively influencing the image of the Downtown – even if actual crime rates are quite low! Fear of crime is a particular concern in locations that are not well overlooked or are disconnected from the rest of the downtown.
- 5 Greater Sudbury has a deeply rich cultural offer located in the Downtown,** however, many of these important cultural groups, such as the Franco-Ontarian communities and the First Nations communities are situated on the periphery of the core and hidden from site. These groups would benefit from higher profile, more accessible locations that are better integrated with the activities and action of the Downtown.
- 6 Downtown Sudbury is geographically well defined.** However, the busy roads and rail corridors that create this definable centre also act as physical barriers to the Downtown, resulting in a centre that feels disconnected from its immediate surroundings and isolated from the rest of the city.
- 7 Downtowns are typically the oldest part of a city.** With a downtown that has been built over the past 130 years, Greater Sudbury is no exception. Unfortunately, many of the reminders of this history – such as the buildings and monuments – have been demolished over the years. Historic buildings are an essential part of creating a downtown identity that helps distinguish the core from the rest of the city. The history and heritage of the Downtown is what makes it unique and this should be protected.
- 8 Over the years, there have been several attempts to revitalize the downtown.** These have often manifested themselves in large-scale projects, such as the Rainbow Centre, the Civic office complex, Memorial Park and the YMCA. To accommodate these projects, land was consolidated and streets closed. This resulted in large scale 'mega-blocks' that turn their backs to surrounding areas.
- 9 The identity of the Downtown is strong along streets like Durham, Larch and Cedar.** However, around the edges of the Downtown, its identity is not as positive. Here, parking lots, vacant shops, busy rail lines and oversized streets present themselves to arriving visitors. Unfortunately this is the first impression that people have of the Downtown when arriving from outside.
- 10 Bringing people into the downtown from across the City is important.** However, the transit station is at capacity and overflowing with big, polluting busses. Furthermore, there are person safety concerns around the station, especially at night time. The transit station is an important City asset that needs some help to overcome its growing pains.



Downtown Sudbury: Challenges



Perceptions of Safety



A Substantial Barrier



Vacant and Under-utilized Sites



Tough Public Realm



Creeks in Need of Help



Forgotten Spaces



Retail Challenges



Poor Integration



An Under-utilized Opportunity



Big, Busy Roads



Dysfunctional Public Spaces

The Future: Downtown's Continued Evolution

This is an exciting time for Downtown Sudbury. The Downtown is buzzing with emerging opportunities - new ideas, new developments and new interest for making the Downtown a stronger, more active and exciting destination to be enjoyed by all of Greater Sudbury.

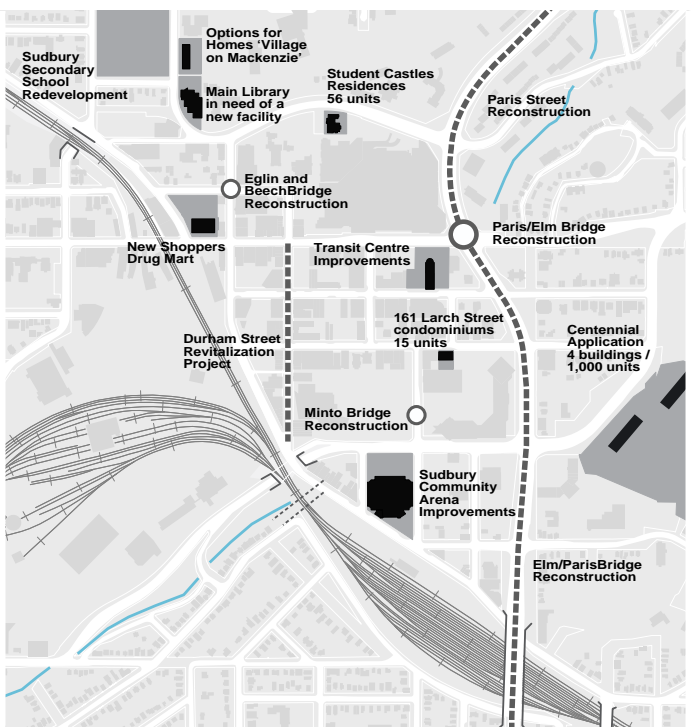
Several opportunities sit on the horizon that can accelerate Downtown's evolution. One of the most immediate is the proposed Laurentian Architecture Laurentienne, tentatively opening in September 2012. This exciting project would be Canada's first new school of architecture in 40 years and the first for Northern Ontario. When fully operational, the school will bring approximately 400 new people to the Downtown core, including faculty and staff. With new university facilities comes the requirement to provide other related staff and student services, such as student residences, restaurants, health care, and so forth. Growing a student population in the core is an exciting aspiration that will help to re-energize the Downtown.

Other public projects being considered include the relocation and expansion of the Art Gallery of Sudbury. Built to showcase the works of the Group of Seven's **Franklin Carmichael**, the Gallery would be rechristened as the **Franklin Carmichael Art Gallery**. The city's Francophone community are also talking about the possibility of creating a new cultural centre in Downtown.

Currently, the building housing Sudbury's Central Library is close to the end of its life and interest has been expressed for opportunities to relocate the branch to a more central location and build a purpose designed building that will act as a contemporary library and community hub.

On the private sector side, the Rainbow Centre continues its transformation from a largely shopping complex to an office complex. One of the city's major developers is planning to create a new 15-unit residential condominium in a former office building (currently in sales) and a more ambitious 1,000 unit residential complex has been proposed for the eastern edge of the Downtown (in planning approval process).

Individually these projects will each contribute to a more successful Downtown and incrementally build confidence in the core. Collectively, these projects will dramatically change the landscape of Downtown over the next ten years.



Emerging Opportunities

- > franklin carmichael art gallery
- > laurentian school of architecture
- > student residence(s)
- > improved central library
- > franco-ontarian cultural centre
- > improved sudbury arena
- > conference & meeting space
- > renewed farmers' market
- > ongoing improvements to Rainbow Centre
- > court house improvements
- > structured parking
- > rail lands relocation & redevelopment
- > private sector-led 'downtown living'





Downtown Sudbury Retail Market Strategy: Baseline Conditions

Table of Contents

1.0	Executive Summary	1
2.0	Introduction	2
3.0	Downtown Sudbury’s Target Markets	4
3.1	Residential.....	7
3.2	Downtown Workers	14
3.3	Overnight Stay Visitors	16
3.4	Arts and Entertainment, Sporting, and Other Attractions.....	19
3.5	Target Market Summary	25
4.0	Retail Supply	26
5.0	Current Retail Positioning	28
5.1	Retail Vision.....	28
6.0	Retail Potential	29
7.0	Conclusions and Next Steps	33

1.0 Executive Summary

The Master Plan process for Downtown Sudbury presents opportunities to enhance the retailer performance and future tenanting program. At present, Downtown Sudbury has already witnessed significant retail investment and is reaping the rewards in terms of a relatively low vacancy rate and a unique mix of independent retailers.

The Rainbow Centre is undergoing a significant redevelopment including re-tenanting. Retailers have made use of the facade improvement program offered by the City to improve their storefronts and create increased customer draw. There is a mix and critical mass of unique stores with specific emphasis on specialty food stores, mid-to-high-end clothing and accessories stores, good home furnishings stores, art galleries, and excellent food service operations.

The target markets for Downtown Sudbury are numerous. The Downtown Sudbury consumer experience changes throughout the day, week, and season. During a typical day, office workers are replaced by early evening diners, who are then replaced by entertainment-seekers. Summertime brings out the restaurant patio patrons, farmers market attendees, and special event attendees; and winter brings the hockey crowds and francophone book aficionados. The stories about Downtown Sudbury are rich and varied and need to be captured and marketed as a selling feature.

As the Downtown develops according to the Master Plan, the retail opportunities should be focused on assisting the existing retail tenants improve their performance and to allow new, unique businesses to flourish. The focus should be on improving those linkages with existing businesses with new infill developments (including retail) to create increased consumer flow throughout the Downtown. Enhancement of the target markets include more middle-to-upper income households in and near Downtown, niche activities that will draw regional visitation, and increased outside visitor levels.

2.0 Introduction

The City of Greater Sudbury (the City) and Greater Sudbury Development Corporation (the GSDC), in partnership with many community associations and organizations, are preparing a new Vision, Plan, and Action Strategy for Downtown Sudbury. Urban Marketing Collaborative/J.C. Williams Group (UMC) is part of a team led by Urban Strategies Inc, who has been retained to assist the City and GSDC with this assignment.

In recent years, a considerable amount of work has been done to better understand and characterize existing commercial conditions and opportunities in Downtown Sudbury. The Downtown Village Development Corporation (the DVDC), with the support of the federal and provincial governments, as well as the Downtown Sudbury Business Improvement Area (the BIA), has completed a Business Retention and Expansion Survey (2007).

More recently, the DVDC and BIA partnered with the Ontario Ministry of Agriculture, Food and Rural Affairs to complete a Business Mix Analysis (2010) and a Trade Area Report (2010), both for Downtown Sudbury. The Business Mix Analysis identifies the structure, function, and potential business opportunities in Downtown Sudbury. The Trade Area Report provides information on local consumer demand and demographic characteristics, which is important to learn the characteristics and buying habits of consumers in the trade area; determine the most important consumer groups to target; and enable assessment of the types of business, merchandise sold, and services offered. OMAFRA's Business Mix Analysis and Trade Area Report for Downtown Sudbury are attached.

Building on this understanding, the retail component of the master plan exercise, identifies future best-fit opportunities that are suited to Downtown Sudbury. More specifically, the retail component will identify the "how much," "who," "where," and "how" of downtown retail, including:

- The most likely amount of new retail space that can be supported Downtown;
- The most appropriate types of retail to fill existing gaps;
- The most appropriate location for new retail, commercial, and residential uses;
- How the downtown can best support and retain its existing retail base;
- How the downtown can best attract new retail uses; and
- How the downtown can differentiate itself from other retail centres.

The results of this work will be woven into the master plan as it is developed.

As a first step in assisting Downtown Sudbury to develop a retail commercial strategy and resulting opportunities, UMC conducted several fact-finding initiatives:

Target Markets:

- Review of existing trade area delineation exercise;
- Review of existing demographic data for Downtown Sudbury's trade areas; and
- Review of all other relevant studies.

Retailer / Supply-Side Profile:

- Review of existing interview findings conducted by Urban Strategies Inc.;
- Interview a variety of retailers and key stakeholders to identify issues and opinions about commercial success in the area;
- Inventory and inspection of businesses and services; and
- Review of the physical environment.

This position paper provides a summary overview of Downtown Sudbury's existing target market, retail supply, and retail positioning. It also begins to look at how much retail could be supported in Downtown Sudbury in the future based on population growth estimates. This information is presented for consideration by the client, its partners, and the master plan team.

3.0 Downtown Sudbury's Target Markets

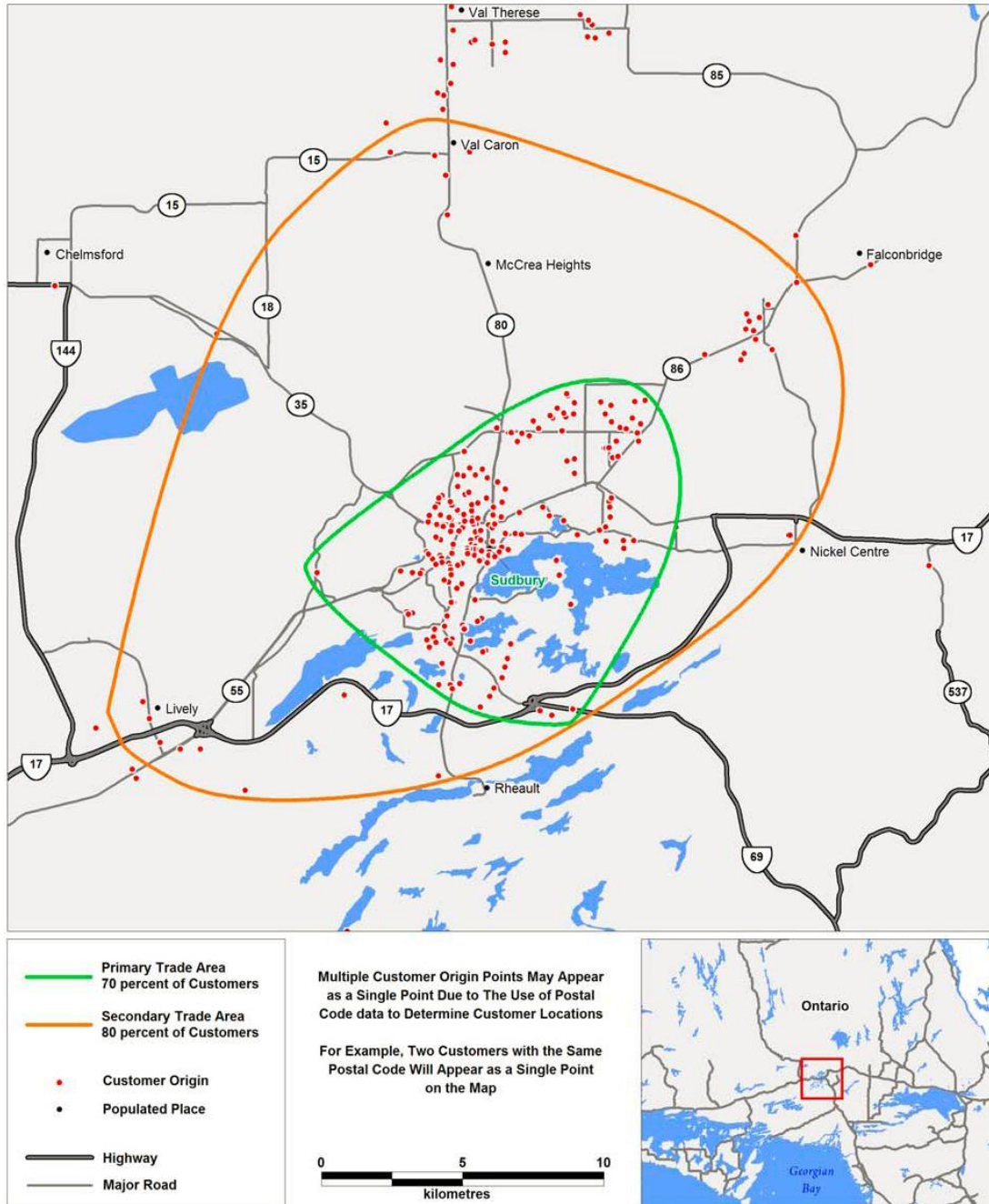
The study area for the master plan exercise focuses on that portion of Downtown Sudbury bounded by Ste. Anne Road, Paris Street, and Elgin Street. Although these streets form the boundary of the core study area, the influence of the master plan will extend beyond these boundaries.

Downtown Sudbury is the centre for government services, financial services, retail, sport and entertainment uses, community uses, and arts and culture. It is where people live, work, shop, worship, recreate, and celebrate. The character of Downtown Sudbury changes throughout the day, week, and season.

The 2010 Trade Area Report prepared by OMAFRA suggests that Downtown Sudbury's primary trade area (i.e., the geographic area in which the 70 percent of current and potential customers for retail and business services live) is centred on the former community of Sudbury. Its secondary trade area (i.e., the geographic area where a further 10 percent of current and potential customers live) extends to Val Caron, Garson, Coniston, the South End, Lively, and Azilda.

A 2009 consumer survey of visitors in Downtown Sudbury revealed the following customer origin data. While two trade areas were developed for this study, this report will focus on the Downtown trade area and the City of Sudbury. There will be additional inflow from other outlying communities.

Customer Origin Consumer Survey for Downtown Sudbury



Source: Downtown Sudbury's Trade Area Report, Sept 2010, OMAFRA

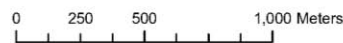
Given its role as a centre for a wide range of uses and activities, Downtown Sudbury serves different target markets. It is important to understand the characteristics of each of these target markets as they all have retail demand implications. Key retail-related target markets for Downtown Sudbury include:

- Greater Downtown residents and regional residents;
- Downtown workers;
- Overnight-stay visitors;
- Arts and entertainment patrons;
- Sporting event patrons; and
- Special event patrons.

3.1 Residential

Downtown Sudbury’s residential development is focused on the Greater Downtown Trade Area, additional inflow from elsewhere in the City of Greater Sudbury, then beyond the city into the region. To facilitate a statistical comparison, for the purposes of this position paper, the Greater Downtown Area includes those lands bounded by Kathleen Street, St. Raphael Street, Lake Ramsey, and Regent Street. This area includes those residents who live within a 15–20 minute walk of Downtown Sudbury.

City of Greater Sudbury - Greater Downtown Area



Prepared by the Community & Strategic Planning Section
August 12, 2008

Source: Statistics Canada, 2006 Census of Canada;
Dissemination Area boundaries and Street Network File for Greater Sudbury CMA

Relevant socio-economic characteristics for the Greater Downtown and City trade areas are included in the following charts.

Socio-Economic Data - 2006

	Greater Downtown	City of Greater Sudbury
Population 2006	10,658	157,860
Households	5,775	65,075
Age Profile		
< 20	15.7%	23.5%
20 to 29	19.2%	12.4%
30 to 39	12.6%	12.5%
40 to 49	14.9%	16.8%
50 to 59	14.1%	14.6%
60 to 69	9.3%	9.7%
70 +	14.3%	10.6%
Household Size		
1 Person	51.2%	27.0%
2 Persons	30.9%	35.8%
3 Persons	9.7%	16.2%
4 to 5 Persons	7.7%	19.7%
6+ Persons	1.0%	1.4%
Persons Per Household	1.8	2.4
% Own Their Housing	35.2%	67.0%
Children at Home	23.5%	38.5%
Bilingualism		
English Only	64.2%	59.3%
French Only	1.3%	1.6%
English and French	34.0%	38.9%
Other	0.5%	0.2%
Occupation		
Management	7.3%	n/a
Business, Finance, Admin.	18.9%	n/a
Science	5.1%	n/a
Health	4.3%	n/a
Government, Education, Social Science	13.5%	n/a
Arts, Culture, Recreation	3.1%	n/a
Sales and Service	27.6%	n/a
Trades, Transport	12.0%	n/a
Primary Industry	1.7%	n/a
Processing, Manufacturing, Utilities	1.1%	n/a

Socio-Economic Data - 2006

	Greater Downtown	City of Greater Sudbury
Education Level (15+ Years)		
Less than high school	25.0%	25.7%
High school	24.7%	25.0%
Certificate, diploma	29.5%	33.8%
University or greater	20.8%	15.5%
Average Household Income	\$49,143	\$68,126
Median Household Income	\$35,712	\$55,019

Source: Statistics Canada

New and proposed housing developments include the following:

Announced New Developments

	Units	Status
Short-Term		
161 Larch	15	Marketing
164 Mackenzie	100 units	Marketing
Centennial Enterprises Application	850	Rezoning application in process
Dalron Application	750	Rezoning and draft plan of subdivision in process
Total	1,715	

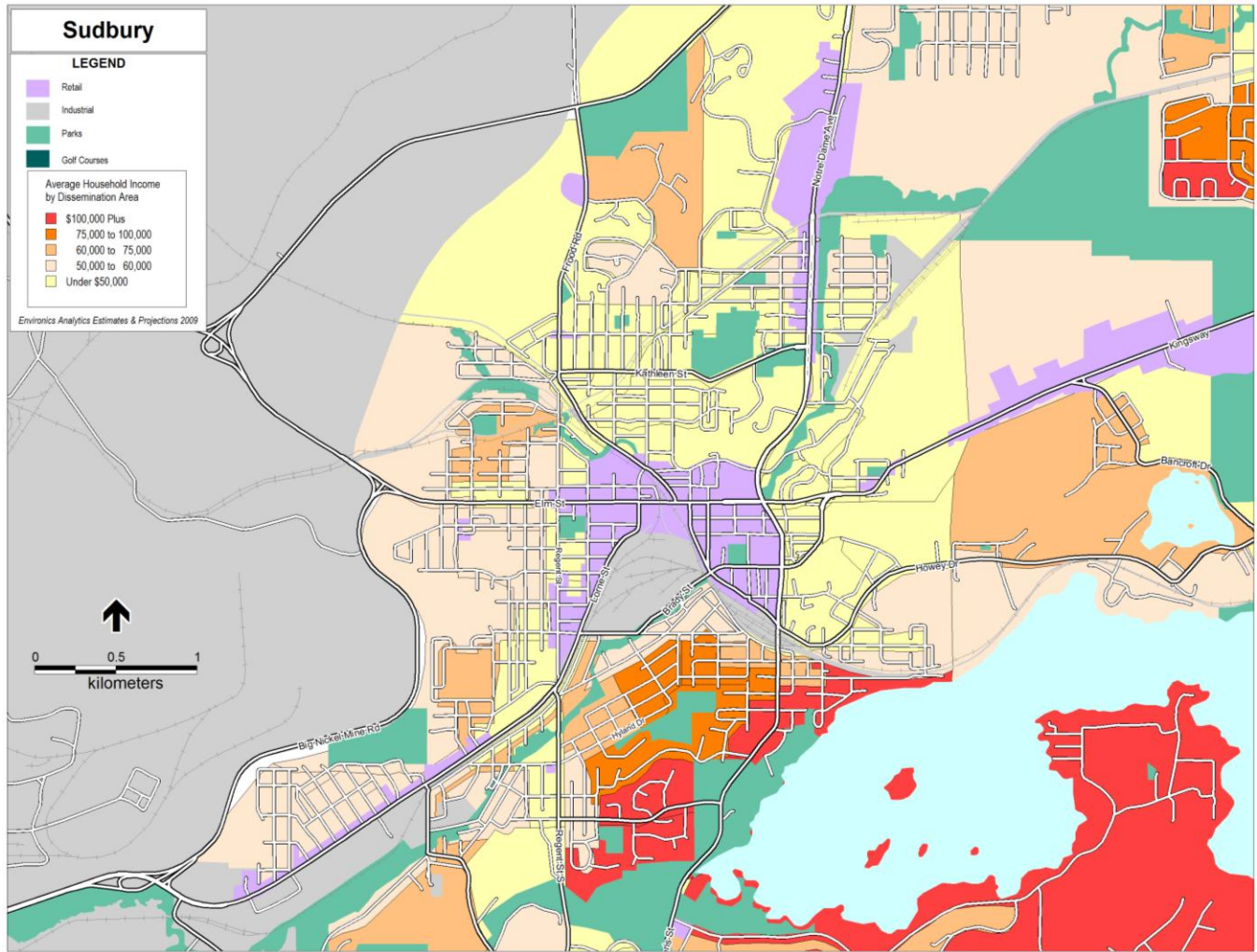
There are other sites in and near Downtown Sudbury that are suitable for infill or adaptive reuse. In some cases, the owners of these properties are actively considering residential and mixed-use opportunities.

Retailer Implications

Key findings include the following:

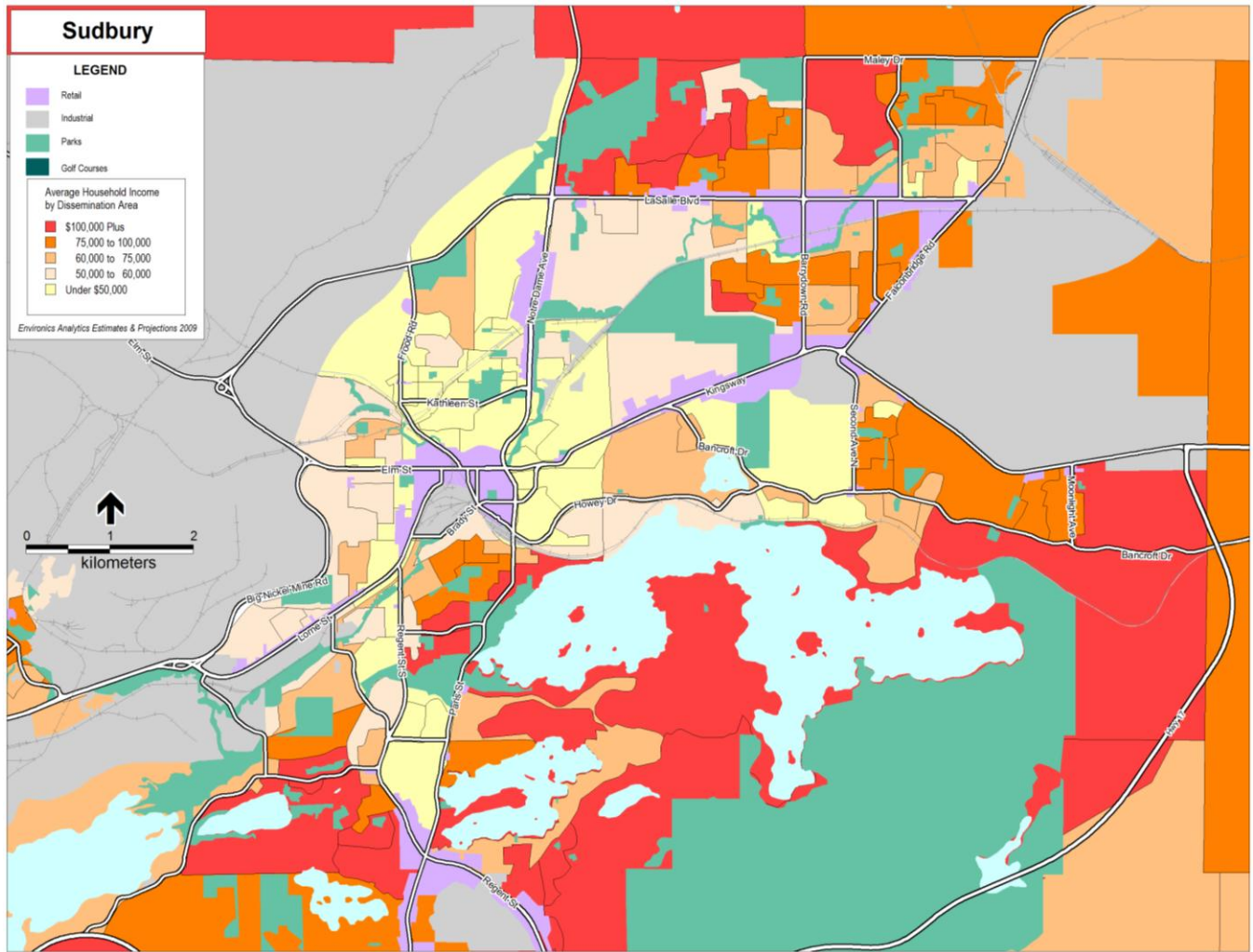
- There is a sizeable neighbourhood population of over 10,000 in the Greater Downtown Area. However, a larger population of mid-to-higher income households in the Greater Downtown would be ideal to support neighbourhood, convenience-based retail. (note that increased residential also sends a strong symbolic message that the area is safe and desirable)
- The age profile is polarized between young urban residents and older urban residents. Nineteen percent of the population is between 20 and 29 years of age and 24% is over 60 years of age. This makes it difficult for retailers if they are unable to develop a concept that has broad age appeal.
- The household sizes are very small – over 50% are single person households including both urban singles and seniors. The urban singles can be a worthwhile target market for Downtowns who search out the diverse offerings and unique retailer attributes that are available. Young empty nesters often are looking for similar cultural and experiential offerings.
- Average household income is 28% lower than in the City. Average household incomes are very high to the south of Downtown but lower elsewhere.
- Education levels are higher than elsewhere, indicating a more consumer who is more inclined to want to spend on quality food services, unique clothing, and leisure items despite average incomes being less than elsewhere.
- A high proportion of residents have occupations that are government and quasi government related (e.g., education, health). Coupled with higher education levels, there is a more urban-type consumer living in and near Downtown Sudbury.

Average Household Income - Zoomed In



Source: Statistics Canada, Environics 2009

Average Household Income



Source: Statistics Canada, Environics 2009

Household Expenditure

A review of annual household expenditure data for the Greater Downtown Trade Area in comparison to the benchmark City of Sudbury reveals the following.

Greater Downtown trade area residents spend proportionately more, the same, or less on the following retail commodities.

Proportionately More	Proportionately the Same	Proportionately Less
<ul style="list-style-type: none"> • Artist materials • Electronic goods • Pet supplies • Health care goods • Sporting events • Toys 	<ul style="list-style-type: none"> • Food from stores • Men’s clothing • Sporting goods • Home furnishings • Children’s clothing • Women’s clothing • Home equipment • Personal care • Alcohol from stores • Fabric, notions, sewing 	<ul style="list-style-type: none"> • Reading materials • Packaged travel • Garden equipment • Food from restaurants • Movies • Alcohol served • Performing arts events • Laundry and dry cleaning

Source: Statistics Canada

Retailer Implications

Given the higher age profile in Greater Downtown, there is a correspondingly higher proportionate spend on health care goods. The local artist community near Downtown accounts for a higher proportion than elsewhere. This group tends to spend higher amounts on artist materials.

Leisure spending is geared towards having fun at home including items such as electronic games, toys, and pet supplies. Greater Downtown residents will spend higher proportions of their budget going out to a sporting event.

The high number of seniors in care facilities is partially responsible for the lower proportion spent on food service and drinking operations. There are pockets of residents who spent a higher proportion on food services.

3.2 Downtown Workers

Downtown Sudbury employees and business owners are one of the most marketable target markets for retail sales. This group is the closest to the retail and have the highest impact because they are Downtown for a significant amount of time. They are the residents who are most aware of what Downtown has to offer including sporting events, cultural events, and festivals.

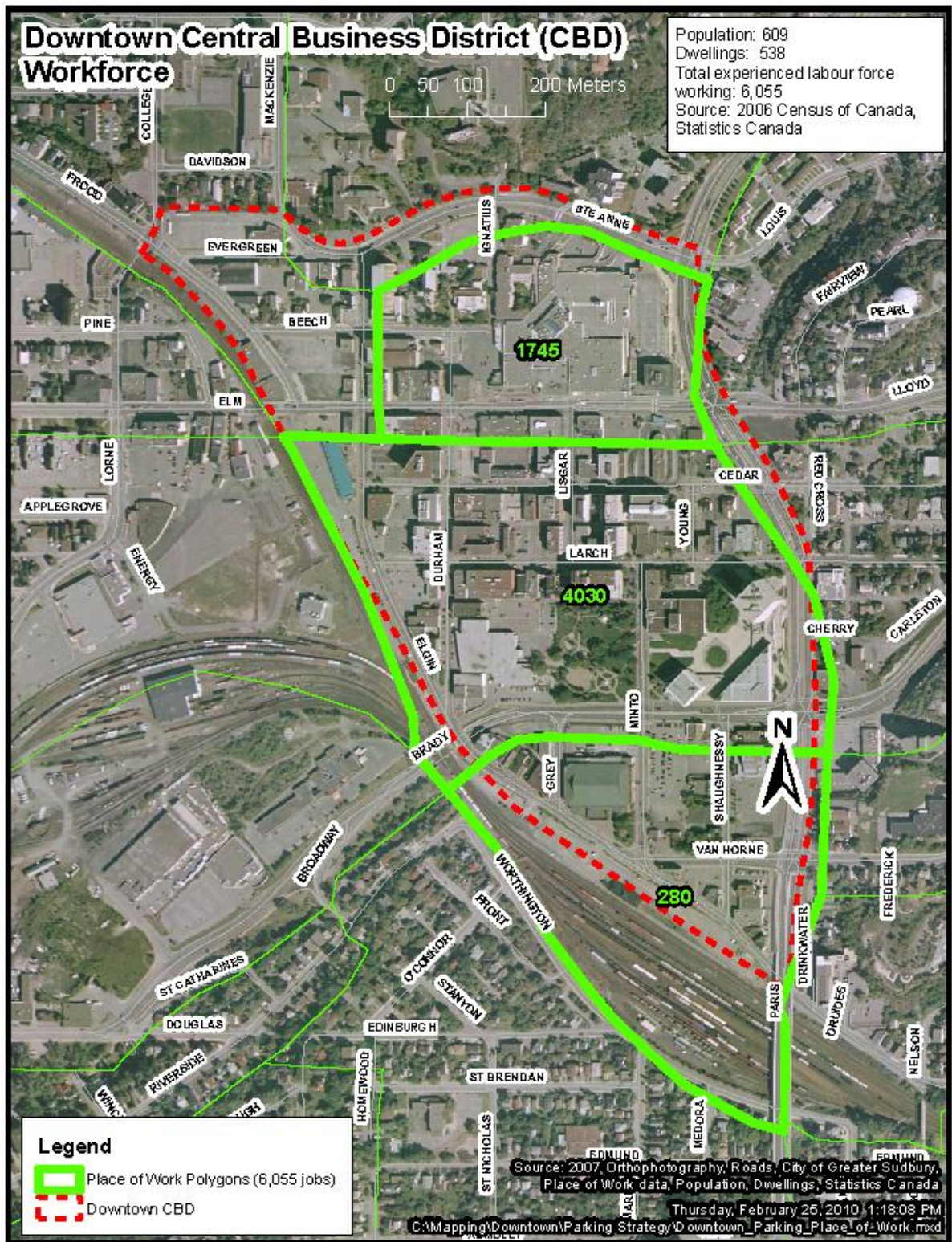
According to Statistics Canada, daytime office worker population for the Downtown is approximately 6,055 workers. A 2007 study by the Downtown Village Development Corporation (DVDC) estimates Greater Downtown worker population at approximately 9,000.

For this report, the conservative estimate of 6,055 workers is used.

Retailer Implications

Typically, this is the target market that will return to Downtown for shopping and dining activities on weekends. They are also Downtown's greatest cheerleaders. They bring other colleagues Downtown for business meetings, meet up with friends after work, and they have positive news stories to tell. Creating peer reviews and developing innovative marketing programs are important for this target market.

This target market responds well to inexpensive but highly focused marketing programs that offer the biggest return on investment. Examples include loyalty cards, after work entertainment programming, and lunch-hour charity events (e.g., a bank sponsors a longest putt tournament for charity).



3.3 Overnight Stay Visitors

Visitors to Sudbury who stay overnight have a greater propensity to spend, especially on food services and retail merchandise. In 2007, there were an estimated 805,000 overnight person visits to Sudbury. This was composed of the following:

Visitor Category	% of Total	Number of Overnight Person Visits
Visiting Friends/Relatives	50%	402,500
Pleasure	27%	217,350
Business	23%	185,150
Total	100%	805,000

Source: Tourism Sudbury, Statistics Canada from City of Greater Sudbury Performing Arts Centre Development Plan July 2008 by Novita, CS&A, and IBI Group

It is noted that total visitation including overnight and day visitors was estimated at 1.3 million.

A review of hotel accommodations in Downtown Sudbury and elsewhere illustrate that approximately 35% of the quality hotel rooms are located in Downtown.

	Number of Rooms
Downtown Sudbury	
Quality Inn	99
Best Western Sudbury Downtown	49
Radisson Hotel	147
Howard Johnson Plaza	75
Days Inn	103
Auberge du Village B&B	2
Total Downtown	475
Other Sudbury	
Holiday Inn	197
Travelodge	140
Hampton Inn by Hilton	121
Super 8	85
Travelway Inn	84
Fairfield Inn	81
Comfort Inn East	81
Comfort Inn	80
Ambassador Hotel	45
Total Other Sudbury	914
Total	1,389

There are an estimated further 300 rooms available at the 15 motels and 10 guest houses/B&Bs and other accommodations in the Greater Sudbury area.

Approximately 400,000 of the total overnight guests stay in a hotel in Sudbury. Downtown Sudbury person guests are estimated at 150,000 (65% occupancy, 1.7 guests per room, average length of stay 1.3 nights).

The City of Greater Sudbury appears to be performing well in comparison to other cities and regions in Ontario. Hotel occupancy rates for January to June 2010 compared to the same period 2009 illustrate the relative standing. Ottawa and northern Ontario communities appear to be less impacted in the overall decline in tourism brought about by the global recession than elsewhere. While there has been some positive increases from 2009 to 2010 other communities remain stagnant.

Hotel Occupancy Rates

	Jan-Jun 2010	Jan-Jun 2009
Thunder Bay	66.4%	62.0%
Ottawa	65.9%	66.1%
Sudbury	64.9%	58.3%
GTA	63.6%	58.1%
Ontario	57.0%	54.3%
London	52.8%	52.8%
North Bay	52.1%	62.7%
Kingston	51.7%	58.9%
Kitchener/Waterloo/Cambridge/Guelph	48.8%	44.9%
Hamilton/Brantford	48.7%	49.1%
Sault Ste. Marie	48.4%	47.2%
Niagara Falls	47.2%	47.5%
Windsor	42.8%	42.3%

Source: Trends and Canadian Hotel Industry, OKF Consulting

Retail Implications

The 475 rooms in Downtown Sudbury provide a direct linkage between visitor sales expenditure and Downtown retail businesses. The bulk of spending will be related to food services but other unique-to-Sudbury products may also be on their to-buy list.

Overnight visitors at other Greater Sudbury hotels will also have a high propensity to spend in Downtown if marketed correctly. There are currently several associations and organizations active in the Downtown and the City that have the organizational capacity to market the Downtown offer. These groups should create hospitality programs that link accommodation, activity centres, and food service operations.

Options may include a new hotel to complement existing Downtown hotels in Downtown Sudbury. The high end and boutique hotel segment appears to be missing in Downtown and in the City. A new hotel may bring in more visitors to Downtown Sudbury but it may not increase the total number of visitors to the overall area.

3.4 Arts and Entertainment, Sporting, and Other Attractions

Investment in arts, entertainment, culture, and sporting carry the added benefits of potential retail spin off sales directly attributed to the event. Some events are meant to showcase the Downtown but not necessarily produce retail sales activity for the merchants. It is important to understand the differences and the potential impact they can have from a retail sales generator or a goodwill, public relations initiative.

The 2004 A Premier Ranked Tourism Destination report for the City of Greater Sudbury on the tourism potential summarized the depth and breadth of arts, entertainment, cultural, and sporting attractions in the City. This includes the fourth largest film festival in Canada and the range of Franco-Ontario events and activities, as well as sporting. The City of Greater Sudbury has an enviable wealth of attractions.

The spinoff retail activities can be significant under some conditions:

- Generally there is a greater spinoff for food service retailers associated with performing arts than with museums or events
- The development of a food service type “restaurant row” scenario is contingent upon having performing arts activities, events, and sporting events programmed throughout the year to provide a stable business model for these businesses. A restaurateur cannot develop a proper business model based upon only being busy 50 to 60 days of the year. The benefit of having several theatres and sporting venues close to one another is that there is a greater likelihood that one of them will be busy on a given night thereby providing a steady stream of target market customers to the area restaurants.

Performing Arts

There are an estimated 3,919 seats available in the City of Greater Sudbury for arts and cultural performances. This includes the Glad Tidings Tabernacle Church that can hold approximately 1,300.

According to the 2008 report “Performing Arts Centre Development Plan,” total ticketed arts and cultural performance events were 436,750 annually. This is a very sizeable number of performing arts events held throughout the year that surpasses many other cities. While many events are held outside of the Downtown, there remains the opportunity to market to these visitors to visit Downtown for dining either before or after the event (note that according to ARCCO the City of Greater Sudbury has 2.27 seats

per 100 residents compared to 1.6 for Thunder Bay, 1.22 for Kitchener, 0.75 for London, and 1.33 for Hamilton)

There are 69 performances scheduled for the 2010/2011 Sudbury Theatre Centre. At 85% occupancy, this is equivalent to 16,715 visitors. In addition, in 2009 there were 14 concerts at the Sudbury Arena (average attendance is 5,000), equating to 70,000 attendees.

Excluding Sudbury Arena, the City of Greater Sudbury's performance venues includes:

Performance Venues

	Seats
Downtown Sudbury	
Sudbury Theatre Centre	285
Sudbury Community Arena	Approx 5,000
Other City of Greater Sudbury	
Theatre du Nouvel Ontario - College Boreal	150
Great Hall - Laurentian University	700
Fraser Auditorium - Laurentian University	664
Auditorium Alphonse Raymond - Laurentian University	n/a
Sheridan Auditorium - Sudbury Sec. School	520
Theatre Cambrian - St. Eugene's Parish Church	300 (approx.)
Glad Tidings Tabernacle - Sudbury Symphony	1,300
Total Seats	8,919 (approx.)

Trade Show Type Events

Added to this are the trade show type events held at the Sudbury Arena. The arena holds approximately 5,000 and has approximately 14 additional trade show type events throughout the year (70,000 attendees).

Other Events in Downtown

In addition, events held in Downtown Sudbury draw additional visitors. A sample of events includes the following:

Events	Estimated Attendance or Details
Salon du Lievre - Bi-annual	20,000 (Sudbury Arena)
Market Square	125,000 season
Carrefour Francophone de Sudbury events	Various venues including Sainte Ann des Pins
La Slague	Various venues including Sainte Ann des Pins
St. Jean Baptiste	Various venues including Downtown
Earth Day	Market Square
Sudbury Rocks Marathon	Downtown YMCA - start and finish
Rib Fest	Downtown
Blues for Food	Durham Street
National Aboriginal Day	Memorial Park
Canada Day Celebrations	Sudbury Arena
Sudbury Pride Week	Tom Davies Square for outdoor music
Summerfest	Bell Park (2010 held in Downtown)
Pumpkin fest	Market Square
Garlic Festival	Hnatyshyn Park
Blueberry Festival	Various venues including Downtown
Greater Sudbury Artist Studio Tour	Various venues including Downtown

There are an estimated 200,000 to 300,000 attendees at different events, farmers' market, and special events in Downtown Sudbury.

Museums and Art Galleries

Although located outside of Downtown, visitation to these attractions has the potential to impact Downtown Sudbury retail if marketing correctly. In addition, there is discussion of an expansion/relocation of the Art Gallery of Sudbury, and Downtown Sudbury is a potential option which has been confirmed by the art gallery as a preferred relocation option.

Venue	Annual Attendance
Science North	136,740
Destination Earth	41,718
Art Gallery of Sudbury	11,000 + 7,000 education camps (primarily children)
Total	189,458 (=7,000 education camps)

Source: Science North, Destination Earth, Art Gallery of Sudbury 2010

Sporting Events

Sudbury Wolves host 35 home games in a regular season at the Downtown Sudbury Arena. Average attendance is 3,000, for a total attendance of 105,000.

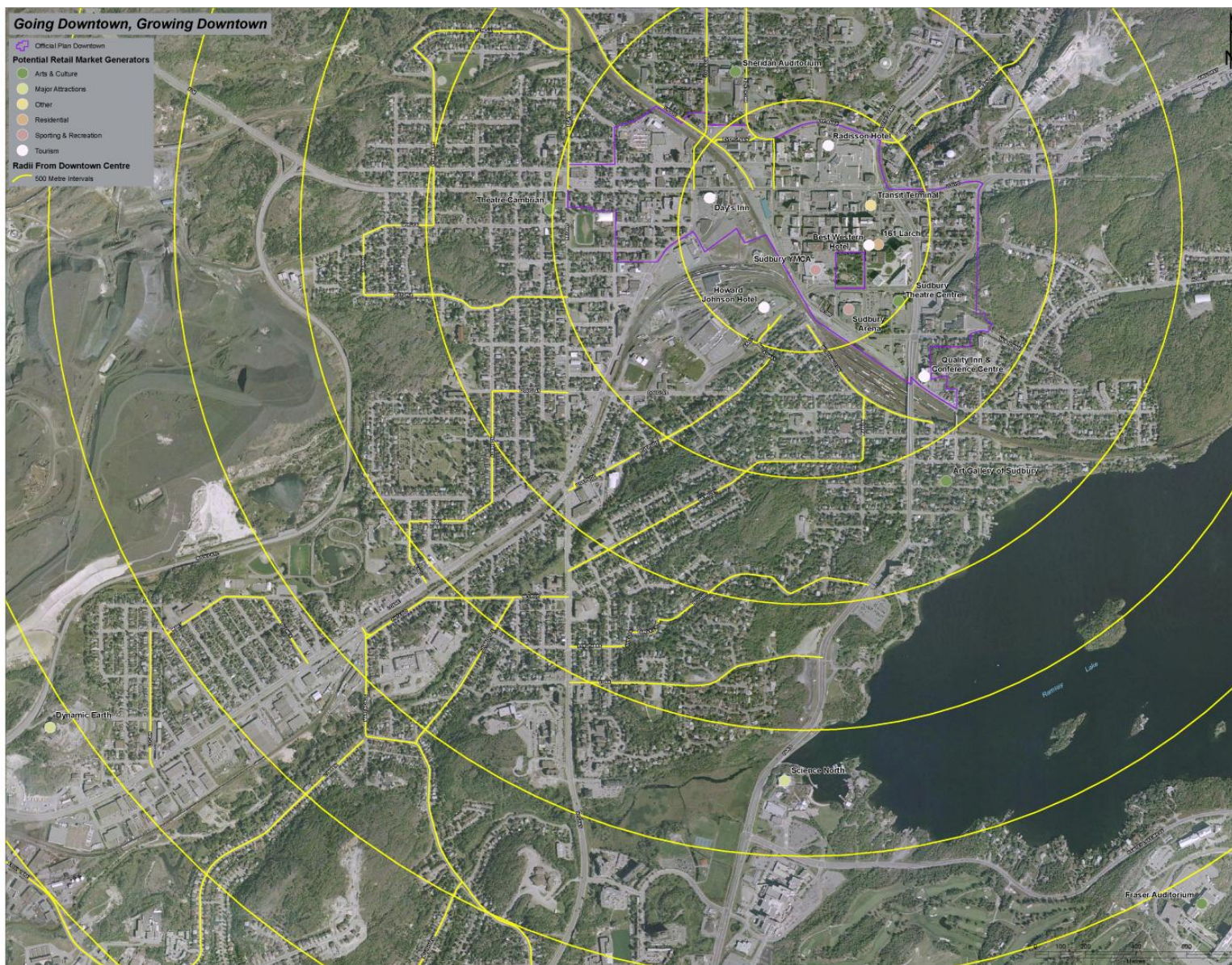
Other Attractions

Other venues that may influence retail sales potential include the following:

- Transit Terminal 15,000 daily passengers
- Rainbow Centre Cinema 6 screens
- YMCA 70,000 sq. ft. facility - recreation, events (no attendance figures are available at present)
- Downtown Sudbury Library approximately 200,000 visits annually

Source: City of Greater Sudbury

Map of Major Attractions in Downtown Sudbury and Nearby



New Developments and Redevelopments

Several redevelopment and new development proposals will impact Downtown retail sales potential. These include:

- Laurentian Architecture Laurentienne – school of architecture
- Downtown Sudbury Library;
- Sudbury Arena; and
- Relocated and expanded Art Gallery of Sudbury.

Retailer Implications

The City of Greater Sudbury has a very strong arts, entertainment, cultural, and sporting heritage. While there is built-in demand for retailer goods and services from activities and events that are happening in Downtown Sudbury, the proposed redevelopments and developments will increase demand. The concern is centred on the ability to retain, enhance, and develop these activities centres in such a way as there is a continual draw of patrons to Downtown. This creates the situation for businesses such as restaurants to develop the type of business model whereby they are busy throughout the year and more profitable.

In addition, as much of the activity is happening elsewhere in the City, the Downtown's retail sales potential are contingent upon businesses and organizations such as the Downtown Association being able to create effective marketing campaigns to capture a portion of that spinoff sales activity (e.g., going to a restaurant in Downtown before going to the Symphony that is located outside Downtown).

3.5 Target Market Summary

A summary of the target markets in Downtown and elsewhere in the City of Greater Sudbury includes the following:

Target Markets

	Current Estimate
Greater Downtown	10,658
City of Greater Sudbury	147,202
Additional Inflow	50,000
Downtown Workers	6,000
Downtown Hotel Guests	150,000
Other Hotel Guests	250,000
Downtown Performing Arts	86,715
Downtown Sporting Event Attendees	105,000
Other Performing Arts	350,000
Other Museum/ Art Gallery	200,000
Downtown Special Events	200,000

Overall, there is a rich variety of different target markets that affect retail sales potential in Downtown Sudbury. The most important is significant residential growth opportunities in and near Downtown (should be closer to 15,000) to create the critical mass of people that warrant additional goods and services.

4.0 Retail Supply

Based on information on floor plate sizes provided by the City of Greater Sudbury and using the Downtown Association's website retailer directory, the following retail audit was conducted. Note that the audit includes only ground floor retail commercial space and easily accessible space. In addition, it is concerned with retail merchandise, convenience goods, food services, personal services, and commercial banking. It does not include professional services at either the ground floor or any other level.

Downtown Sudbury Retail Commercial Audit

	Number of Businesses		Square Footage	
	Number	% of Total	Total	% of Total
Retail Merchandise				
Apparel and Accessories	30	15.9%	67,973	18.6%
Home, Appliance, Electronics	9	4.8%	31,734	8.7%
Leisure	7	3.7%	8,000	2.2%
Other General Merchandise	10	5.3%	19,514	5.3%
Total Retail Merchandise	56	29.7%	127,221	34.8%
Convenience - Food and Drug				
Food and Beverage	13	6.9%	19,972	5.5%
Health and Personal Care	3	1.6%	26,500	7.3%
Total	16	8.5%	46,472	12.8%
Eating and Drinking				
Café, Fast Food	25	13.2%	21,000	5.8%
Restaurant	25	13.2%	25,872	7.1%
Drinking	11	5.8%	38,141	10.5%
Total	61	32.2%	85,013	23.4%
Services				
Personal Services				
Total Personal Services	29	15.3%	39,821	10.9%
Financial Services	9	4.8%	36,000	9.9%
Total Services	38	20.1%	75,821	20.8%
Total Occupied Commercial	171	90.5%	334,527	91.7%
Vacant Commercial	18	9.5%	30,360	8.3%
Total Commercial	189	100.0%	364,887	100.0%

Source: Downtown Association, City of Greater Sudbury, UMC

Note: ground floor professional office space is not included

Salient findings include the following:

- There is approximately 365,000 sq. ft. of retail type space in Downtown Sudbury. A sizeable amount that is comparable to other major shopping nodes. (Note this is twice the size of Downtown Thunder Bay (Heart of the Harbour BIA).
- Vacancy is relatively low and excluding Rainbow Centre is very low.
- Retail merchandise is the dominant retail category. Approximately 35% of the total square footage is devoted to retail merchandise. This is higher compared to other Downtowns and a strength to build upon. Apparel, footwear, and accessories account for almost 70,000 of the total square footage. Home furnishings and furniture account for a sizeable portion of the total square footage. The quality of these two categories is good to very good. There is an important leisure category but the small nature of the retailers means the others dwarf this category.
- Almost one-quarter of the total square footage is devoted to food services. The largest component is the bars, clubs, and venues for entertainment. The range of food services varies from eclectic and modern, to French cultural, to traditional. As the Downtown Sudbury market grows and develops, there will be a possible re-alignment and/or redevelopment of many of these larger venues.
- Convenience retail including food and beverage and pharmacy and health care also includes a sizeable amount of space. The two large pharmacies account for the majority of the space but smaller eclectic specialty food retailers create great food spaces, many that carry unique Sudbury products. Doyle's Marketplace is able to satisfy a significant amount of grocery shopping needs and the farmers' market is a great draw for fresh foods and craft items. Food retail is competitive including the nearby Loblaws (Dumas YIG) and Food Basics. Smith's Market, in New Sudbury, provides a more unique food experience in the City of Greater Sudbury.

Retailer Implications

The amount of retail in Downtown Sudbury is impressive and competitive with the other centres in the City of Greater Sudbury. The strengths in the retail mix include:

- Food services - varied mix of options from coffee houses, cafes, bistros, restaurants, and late evening entertainment;
- Apparel, footwear, accessories - the independent nature of Downtown Sudbury includes a mix of mid-to-high apparel brands. In addition, Rainbow Centre caters to the discount and junior fashion shopper;
- Home furnishings - good quality home furnishings; and
- Specialty food - including the Farmers' Market there are a number of specialty food shops showcasing local products as well as good quality unique food products. Doyle's Marketplace is able to provide a range of food and beverage staples for the local households.

5.0 Current Retail Positioning

As stated, the other two major retail centres in the City of Greater Sudbury are the south end near Paris/Regent and New Sudbury. Major retailers at each location include the following:

- South End – Walmart, Canadian Tire, Southridge Mall, Regent Street larger formats
- New Sudbury – New Sudbury Centre (Sears, Walmart, Future Shop, SportChek, Aeropostale, Laura, American Eagle, HMV, Coles) and Rio Can Centre (Chapters, Staples, Sears Whole Home, HomeSense, Pier 1, Old Navy, PetSmart, Winners, Michaels, Silver City)

Due to the City of Greater Sudbury's size, the population can typically support only one of each major retailer's banner (e.g., one Chapters store, one Winners).

Within Downtown Sudbury, there are several streets (centres) with varying strengths related to retail potential. Current positioning includes the following:

- Rainbow Centre – junior fashion, discount, food court, office serving
- Elm Street – large format stores, banks, convenience, large restaurants, home furnishings, electronics
- Elgin (south end) – arts district, small independent stores, difficulty due to one-side retail (however, consumers view it as an extension of Durham Street's retail offering)
- Durham – eclectic village, men's and women's clothing and accessories, home furnishings, specialty food, leisure retail, food services, patio restaurants
- Cedar (west) extension of Durham – men's and women's clothing and accessories, food services – mix of office serving and regional visitation
- Cedar (east) – transit and worker oriented retail and services
- Larch – no defined role, personal services, cafes, office serving goods and services, medical centre
- Shaughnessy's or Minto – destination entertainment and food services
- Paris – highway commercial retail (vehicular dependent). Any development on the east side of Paris must have reinforced connections with Downtown

5.1 Retail Vision

The retail vision for Downtown Sudbury includes:

- Entertainment centre including food services;
- Neighbourhood convenience goods and services;
- Shopping destination for apparel, home furnishings, and leisure goods (books, sporting goods); and
- Office servicing goods and services.

6.0 Retail Potential

Two retail potential scenarios have been developed:

- 2010 Base Case
- Future date – increased population and slight increase in capture rates for some categories. This future scenario is not based on any particular set of developments but modest increases. J.C. Williams Group has prepared this as a template so that other future scenarios can also be tested to ascertain their impact on retail sales and total square footage.

The retail categories include retail merchandise (e.g., apparel, home furnishings, electronics, and leisure retail), convenience goods (e.g., grocery, convenience stores, specialty food, wine and liquor stores, and health care stores), and eating and drinking (cafe, coffee shop, lunch, fast food, full-service restaurant, and bar). Personal services have not been included in the analysis due to the difficulty in assessing average sales potential and average sales per square foot (e.g., travel agents, banks, and personal care services).

Target Markets

	Current Estimates	Option A
Greater Downtown	10,658	12,700
City of Greater Sudbury	147,202	154,710
Additional Inflow	50,000	50,000
Downtown Workers	6,000	10,000
Downtown Hotel Guests	150,000	200,000
Other Hotel Guests	250,000	250,000
Downtown Performing Arts	86,715	100,000
Downtown Sporting Event Attendees	105,000	150,000
Other Performing Arts	350,000	350,000
Other Museum/ Art Gallery	200,000	250,000
Downtown Special Events	200,000	250,000

Note – the option is one scenario related to growth in the above listed target markets

The following table contains:

- Annual visitation/attendance levels or the population levels; and
- Retail expenditure for retail merchandise, convenience goods, and eating and drinking. These represent the average sales associated with each visitor regardless of whether they are a purchaser or not.

- Total Potential is the visitation level multiplied by the retail expenditure. This represents the total dollar value of sales that are available to be captured by Downtown Sudbury.
- Capture rates are estimated based partially on the Downtown Sudbury survey and UMC's experience with other downtowns and shopping districts.
- Downtown Sudbury expenditure is the result of the total potential multiplied by the capture rates.
- Because there is cross-over in expenditure between the target market groups, an adjustment has been made to lower expenditure by one-third.
- Average sales per square foot based on industry standards are used to determine the square footage that is possible. This is achieved by total adjusted sales divided by sales per square foot.
- The option is only one scenario based on redevelopment and development options. This is solely used to illustrate the impact on retail square footage demand based on this scenario. The option does not suppose any changes in the marketing that may also increase capture rates.

Based on the one option for increased target market sizes, the demand for retail merchandise, food services, and convenience retail increased by approximately 25,000 sq. ft.

Current Retail Demand Summary

The following chart represents the current retail situation in Downtown Sudbury.

2010 Downtown Sudbury Retail Expenditure														
	Downtown Residents	Greater Sudbury	Additional Inflow	Students Living Downtown	Students Studying Downtown	Downtown Workers	Downtown Hotel Guests	Other Hotel Guests	Performing Arts	Sudbury Arena - Sporting Events	Other Performing Arts in Sudbury	Other Museum and Art Gallery	Special Events Attendees	Total
Retail Potential														
Population	10,658	147,202	50,000	0	0	6,000	150,000	250,000	86,715	105,000	350,000	200,000	200,000	
Expenditure														
Retail Merchandise	\$1,815	\$1,879	\$1,879	\$1,815	\$1,160	\$870	\$30	\$30	\$1	\$1	\$1	\$2	\$2	
Convenience Goods	\$3,052	\$3,160	\$3,160	\$3,052	\$512	\$170	\$5	\$5	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$408	\$423	\$423	\$408	\$888	\$1,400	\$50	\$50	\$13	\$9	\$13	\$6	\$6	
Total	\$5,275	\$5,462	\$5,462	\$5,275	\$2,560	\$2,440	\$85	\$85	\$14	\$10	\$14	\$8	\$8	
Total Expenditure Potential														
Retail Merchandise	\$19,344,270	\$276,592,558	\$93,950,000	\$0	\$0	\$5,220,000	\$4,500,000	\$7,500,000	\$86,715	\$105,000	\$350,000	\$400,000	\$400,000	
Convenience Goods	\$32,528,216	\$465,158,320	\$158,000,000	\$0	\$0	\$1,020,000	\$750,000	\$1,250,000	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$4,348,464	\$62,266,446	\$21,150,000	\$0	\$0	\$8,400,000	\$7,500,000	\$12,500,000	\$1,090,875	\$934,500	\$4,403,000	\$1,164,000	\$1,164,000	
Total	\$56,220,950	\$804,017,324	\$273,100,000	\$0	\$0	\$14,640,000	\$12,750,000	\$21,250,000	\$1,177,590	\$1,039,500	\$4,753,000	\$1,564,000	\$1,564,000	
Downtown Capture Rates														
Retail Merchandise	30%	13%	3%	20%	5%	25%	50%	25%	75%	75%	0%	0%	80%	
Convenience Goods	65%	2%	2%	55%	15%	75%	75%	10%	75%	50%	0%	0%	50%	
Eating and Drinking	65%	40%	10%	40%	50%	80%	75%	50%	85%	85%	25%	10%	85%	
Downtown Expenditure														
Retail Merchandise	\$5,803,281	\$35,957,033	\$2,818,500	\$0	\$0	\$1,305,000	\$2,250,000	\$1,875,000	\$65,036	\$78,750	\$0	\$0	\$320,000	
Convenience Goods	\$21,143,340	\$9,303,166	\$3,160,000	\$0	\$0	\$765,000	\$562,500	\$125,000	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$2,826,502	\$24,906,578	\$2,115,000	\$0	\$0	\$6,720,000	\$5,625,000	\$6,250,000	\$927,243	\$794,325	\$1,100,750	\$116,400	\$989,400	
Total	\$29,773,123	\$70,166,777	\$8,093,500	\$0	\$0	\$8,790,000	\$8,437,500	\$8,250,000	\$992,280	\$873,075	\$1,100,750	\$116,400	\$1,309,400	\$137,902,805
Supportable Square Footage														
Retail Merchandise (\$300/sq. ft.)	19,344	119,857	9,395	0	0	4,350	7,500	6,250	217	263	0	0	1,067	126,181
Convenience Goods (\$600/sq. ft.)	35,239	15,505	5,267	0	0	1,275	938	208	0	0	0	0	0	43,824
Eating and Drinking (\$500/sq. ft.)	5,653	49,813	4,230	0	0	13,440	11,250	12,500	1,854	1,589	2,202	233	1,979	78,557
														248,562

Retail Potential Summary

The result of the analysis illustrates that there is not a significant amount of new retail space that is warranted based on modest increases in target market demand. Many of the proposed changes will allow for better functioning of the Downtown as well as providing needed space for increased residential.

The resulting impact on the retail situation is improved sales and profitability for existing retailers and providing infill opportunities for new retailers (shift from marginal businesses to increased profitability).

7.0 Conclusions and Next Steps

The following represents the existing retail conditions in Downtown Sudbury that was used as input into the new Vision, Plan, and Action Strategy. This information forms the basis for the final strategy sections that include district and block retail strategies. In addition, retention and recruitment protocols will also be developed.

City of Greater Sudbury

DOWNTOWN SUDBURY MASTER PLAN

TRANSPORTATION POSITION PAPER

APRIL 2011



TABLE OF CONTENTS

1.	INTRODUCTION	1
2.	PREVIOUS REPORTS.....	2
3.	MOBILITY ANALYSIS.....	4
3.1	General Transportation Conditions	4
3.2	Pedestrians	4
3.3	Cyclists.....	5
3.4	Transit	6
3.5	Vehicular	9
3.6	Intercity Travel.....	9
3.7	Parking	10
	3.7.1 Existing Supply and Utilization	11
	3.7.2 Future Parking Demand.....	16
3.8	Infrastructure	16
4.	PUBLIC AND STAKEHOLDER INPUT AND IDEAS	19
	4.1.1 Stakeholder Meetings	19
	4.1.2 Community Forum #1	19
5.	TRANSPORTATION ISSUES AND DIRECTIONS FOR MASTER PLAN	21
5.1	Initial Issues Raised by City	21
	5.1.1 Completion of the Ring Road System	21
	5.1.2 Pedestrianization of Durham Street	21
	5.1.3 Conversion of the One-way Pair System on Cedar and Larch	22
	5.1.4 Calming of the Ring Road System.....	22
	5.1.5 Opportunities for Strengthening Active Transportation Connections to Adjacent Neighbourhoods.....	23
	5.1.6 Parking Supply and TDM	23
	5.1.7 Status of CP Rail Yards	24
5.2	Other Considerations for Master Plan.....	25
	5.2.1 Creating a Central Greenway.....	25
	5.2.2 Developing a Downtown Way-finding System.....	25
6.	SUMMARY CONCLUSIONS AND NEXT STEPS	26
6.1	Key Conclusions and Recommended Directions.....	26
6.2	Next Steps.....	27

TABLE OF CONTENTS (CONT'D)

List of Exhibits

Exhibit 3.1: Existing and Planned Trails from Official Plan	6
Exhibit 3.2: Ridership per Capita Peer Review	7
Exhibit 3.3: Sudbury Transit Downtown Coverage	8
Exhibit 3.4: Road Classification from Official Plan	9
Exhibit 3.5: Intercity Rail Services.....	10
Exhibit 3.6: Downtown Off-street Parking Lots	12
Exhibit 3.7: On-street Parking Supply and Time Limit	13
Exhibit 3.8: Peak-Hour Utilization Rate – Off-Street Parking.....	15
Exhibit 3.9: Existing Infrastructure System in Downtown Sudbury	17

1. INTRODUCTION

The City of Greater Sudbury has embarked on an exciting process to create a vision for Downtown Sudbury that secures buy-in from all levels and develops an action-oriented Master Plan and Action Strategy to deliver the Vision. IBI Group is working as an integral part of the Urban Strategies lead team to explore and develop ideas and actions related to transportation, parking, heritage and infrastructure. IBI Group also lead the preparation of the Strategic Parking Plan for the city, which is informing the Downtown Master Plan.

The purpose of this report is to present the initial analysis of transportation, parking and infrastructure conditions. Specifically, the report includes the following:

- A review of existing reports that contain analysis or recommendations on the transportation and parking system;
- An analysis of existing conditions, issues and opportunities by mode and topic;
- A summary of what was heard during the stakeholder meetings and public events; and,
- Directions to guide the development of the Master Plan.

2. PREVIOUS REPORTS

A number of reports have been prepared for previous initiatives that are relevant to the transportation aspects of the Downtown Vision.

Official Plan

The City of Greater Sudbury 2008 Official Plan contains a number of policies for transportation in the City, generally organized by roads, public transportation, parking active transportation, rail and air. The transportation policies were guided by the 2005 Transportation Study Report (prepared for the Official Plan by EarthTech).

The Transportation Study Report contains details of the existing and proposed road hierarchy and the existing truck routes through the City.

Operational Studies

A Downtown Transportation Review was carried out by the former Regional Traffic and Transportation Section (undated but thought to be written between 1997 and 2001), covering a number of issues including one-way or two-way traffic operation, consideration of traffic calming, goods movement, on-street parking on Elm Street, pedestrian crossings and transit. The report contained several recommendations related to changing intersection control, retaining one-way streets, postponing introduction of on-street parking on Elm Street and the introduction of a pedestrian crossing on Elm Street.

In 2001, a Parking and Truck Traffic Study was carried out by City staff to investigate traffic issues on Elm Street. The study included analysis of origins and destinations of trucks on Elm Street and Lorne Street and found that approximately 3.6% of daily traffic on Elm Street was large commercial trucks. Of those trucks, it was determined that approximately 28% were not on the most direct route, and could be redirected to Brady Street.

Sustainable Mobility Plan

This plan was received by Council in June 2010 for information only. There is no funding attached to the recommendations of the study. One of the key recommendations of the study is that it recommends the establishment of a joint committee to guide decisions on sustainable transportation. At the moment there are a number of groups addressing different aspects of sustainability but no overarching umbrella group. This is likely to be an advisory committee of Council.

Cycling Plans

The current cycling plan is getting dated and is no longer up-to-date with respect to recommended networks. In 2010 the Bicycle Advisory Panel completed a new cycling plan but this is not yet approved by the City nor has it been made public. The Official Plan, which was adopted in 2008, also has a recommended trails network.

Pedestrians

There have been no stand-alone plans with regard to the overall pedestrian network. However, there has been a walkability panel established to address pedestrian issues. A study of particular pedestrian crossing locations was carried out by iTrans on behalf of the City in 2005, but has not been presented to Council for approval. However, the study's recommendations for the Ste Anne

pedestrian crossing have been implemented in 2010. A Pedestrian Crossing Best Practices Policy, was prepared at the same time, but has also not been presented to Council for approval.

Downtown Sudbury Streetscape Project (Phase 1 – 2005, Phase 2- 2008)

The Streetscape Project was started to respond to one of the goals of the Greater Sudbury Development Corporation's Economic Development Strategy. The Streetscape Project put forward a conceptual plan that identified a number of locations and proposed treatments to improve pedestrian amenity on downtown streets. Phase 2 of the study identified traffic calming measures, crosswalk treatments, pedestrian gateways, and implementation details and phasing.

Transit

The City completed a transit study in 2006 (study by ENTRA). This study largely identified minor revisions to the route network which have now been implemented. In recent years Sudbury Transit has been undertaking a number of projects in improving bus stop announcements, gathering detailed data by bus stop and addressing space constraints at the downtown terminal. No radical changes to the transit system are anticipated in the coming years.

3. MOBILITY ANALYSIS

3.1 General Transportation Conditions

Compared to many downtown areas of cities similar in size to Sudbury, the transportation system in downtown Sudbury works quite well. There is no single street that experiences major congestion and with the exception of one at grade rail crossing on Elm Street, there are no major bottle necks leading into or out of the downtown. Indeed, the term congestion was barely mentioned in any public or stakeholder discussion. Normally, a lack of congestion might be associated with a downtown that is devoid of economic vitality and pedestrian activity, but this is by no means the case for Sudbury. In general, there is a good balance between road capacity and pedestrian spaces. The only exceptions to this could be Paris Street and Brady Street which some may say are overbuilt for vehicles and under-provide for pedestrians.

Because the road network is not broken in the vehicular movement sense, it means that there are opportunities to incrementally change the streets to support economic development and increase pedestrian activities. Such changes, which are discussed throughout this report, may include allowing on-street parking where it is currently restricted, adding bicycle lanes, or widening sidewalks.

Another unique attribute of downtown Sudbury is that all activities within the area bounded by Elgin Street, Ste. Anne Road and Paris Street are within a 10 minute walk of each other and focused on a major transit hub. What this means is that downtown Sudbury can effectively function as a place of exchange focused on people rather than entirely on cars.

Perhaps one of the biggest challenges and opportunities for transportation in the downtown is to improve connections to the surrounding neighbourhoods and activities, specifically for pedestrians, cyclists and transit riders. As it stands, the arterial ring roads and CP Rail yard are significant barriers. Ideas on how to improve connectivity are discussed throughout this report and the goal of connecting to surrounding communities will be a major focus of the overall master plan.

Finally, while not a direct transportation issue, the perception of personal safety concerns in the downtown that are expressed by many Sudbury residents is a major concern because these types of perceptions undermine efforts to promote the downtown as a vibrant walkable place. Fortunately, there are many small changes that can be pursued to dispel concerns about safety ranging from improved signage and way-finding to enhancing the attractiveness of the downtown transit terminal. The theme of changing the perceived image of safety in the downtown will be vigorously pursued throughout the development of the transportation recommendations and overall master plan.

3.2 Pedestrians

Factors that contribute to the quality and safety of the pedestrian environment include:

- Land Use
- Street and Sidewalk Connectivity
- Access Management
- Site Layout and Design



- Level of Service

Generally speaking the pedestrian environment in downtown Sudbury is quite good. All streets have sidewalks on both sides, the street network is generally continuous and retail streets such as Durham, Cedar and Larch are quite walkable with buildings lining the edge of the street and at a pedestrian scale.

Where the pedestrian network breaks down is at the interface with major arterials and the connections to the surrounding neighbourhoods. This includes:

- Brady between Minto Street and Paris Street
- Elm Street in the vicinity of the transit hub
- Virtually all of Paris Street, Notre Dame Avenue and Ste. Anne Road where traffic speeds are relatively high and pedestrian crossings are far apart
- The Brady Street underpass, which is not accessible for pedestrians
- The pedestrian underpass from Elgin Street to Riverside Drive



In recognition of these issues, the City did commission a Pedestrian Crossing Study and Pedestrian Crossing Best Practices Policy in 2005, and some of the recommendations from this study have been implemented. Significantly more improvements are required; however, to further improve pedestrian safety. Such improvements, to be detailed in subsequent stages of the Master Plan, include raised intersections, new intersections, pavement markings and traffic calming.

Another element that is lacking somewhat in the downtown is signage. Street signs are too small to read (though the City is replacing these) and there are no overall way-finding systems for pedestrians.

With the on-set of the new regulations under the Accessibility for Ontarians with Disabilities Act (AODA), changes will be required to accommodate increased accessibility. Specifically, the Final Proposed Accessible Built Environment Standard provides recommendations to government on how to remove barriers in buildings and outdoor spaces for people with disabilities. The proposed standard includes recommendations on items such as curb ramps, pedestrian crossings, pedestrian signals and street furniture. It makes specific reference to the challenges that cobblestone pavers create for persons in wheelchairs and scooters in terms of vibration. This comment was already expressed by the accessibility committee about Sudbury's albeit visually attractive unit paver sidewalks.

3.3 Cyclists

There are currently no dedicated bicycle lanes in downtown Sudbury; however, with the exception of the primary arterial streets, downtown streets are suitable for most adult cyclists. The one-way streets sometimes contribute to wrong-way riding, but not to a significant extent.

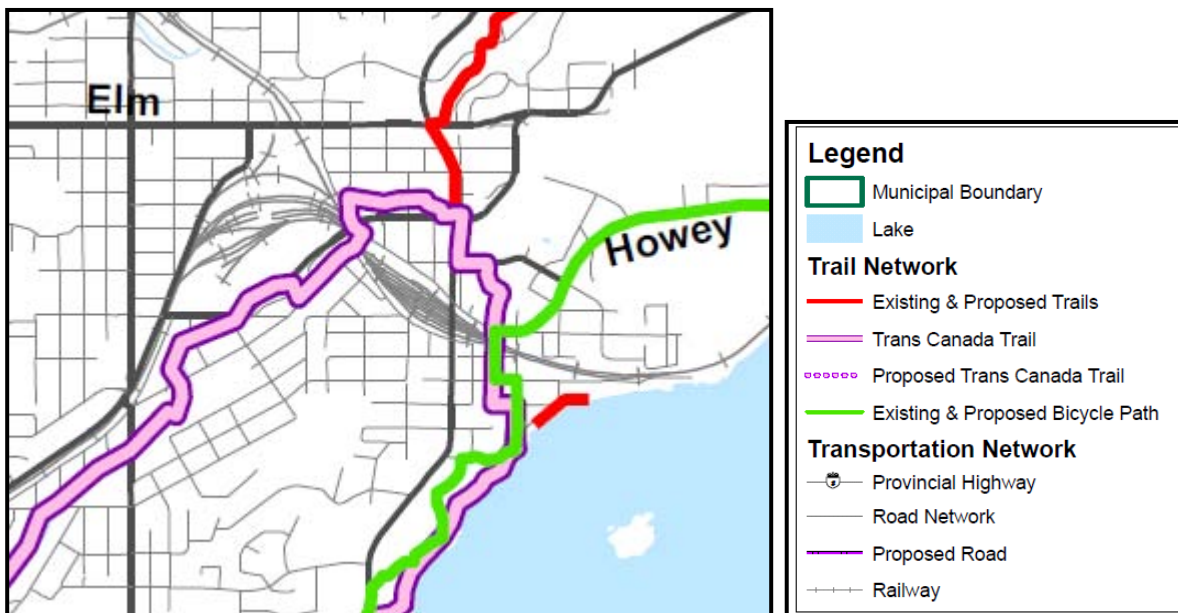
Downtown Sudbury is also surrounded by an excellent trail system, most notably the Bell Park trail and boardwalk, the trail that follows junction creek north and south of the downtown and Froid Road/Nolins Creek trail.

Therefore, the greatest opportunity for cyclists is to implement improvements within the downtown core that serve to tie together these external assets while improving conditions for cycling within the downtown. Similar to pedestrians, there is also a need to overcome the barrier effect of the ring roads and rail corridor.

One idea, which is discussed later in Section 4, is to create a central greenway (i.e. walking and bicycle corridor) through the downtown, most likely using Elgin Street as the spine. The idea of upgrading laneways to accommodate/encourage cyclists has also been suggested, but is not without challenges (e.g. safety at street crossings, lighting, etc.).

In addition to infrastructure solutions, there is also a need to significantly enhance amenities for cyclists in the downtown, starting with bicycle parking, and to develop supporting policies for new development. Many ideas are presented in the Sustainable Mobility Plan prepared by the Rainbow Routes Association.

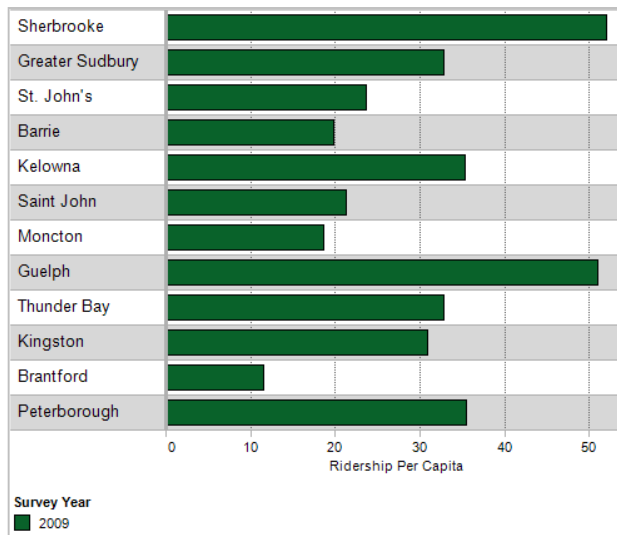
Exhibit 3.1: Existing and Planned Trails from Official Plan



3.4 Transit

In 2009, the City's transit system reported 4.2 million passenger trips along its 43 fixed routes. Its ridership per capita is comparable to other peer cities across Canada (see Exhibit 3.2). Sudbury does not do quite as well as cities like Sherbrooke and Guelph where university riders drive the numbers up, but it does do better than cities such as Barrie and Brantford which are not as self contained as Sudbury. Although Greater Sudbury's ridership had been steadily growing between 1996 and 2006, it has remained fairly steady over the past 5 years. In addition to fixed route service, the City provides specialized transit and trans-cab service connections to serve areas not covered by regular fixed route service. The City has also implemented express routes from the Downtown terminal to Laurentian University and Cambrian College and special school services during the school year.

Exhibit 3.2: Ridership per Capita Peer Review



Source: Canadian Urban transit Association, Canadian Transit Fact Book, 2009 Operating Data

The City’s transit system provides good coverage to a large geographic area, with a radial network of routes. The majority of routes terminate at the Transit Centre in downtown allowing for convenient connections to various areas of the City and good circulation within Downtown. Most transit streets in Downtown are served by at least one transit route, as shown in Exhibit 3.3. The Transit Centre is a great amenity located at the heart of Downtown within walking distance to major shopping destinations (e.g. Rainbow Centre) and government offices.

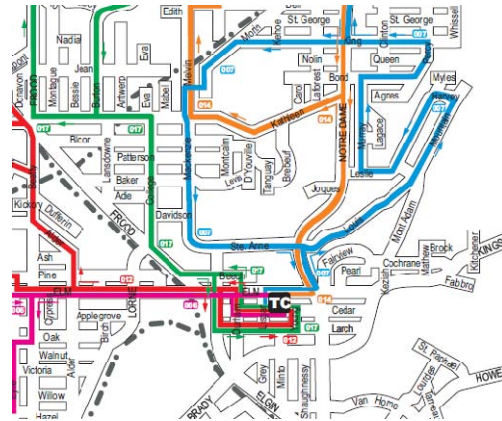
Recent initiatives by the City to promote transit include the bike racks on transit buses pilot project, the introduction of the U-Pass program in September 2006, and the implementation of its Stop Announcement System (SAS). Additional improvements, to be detailed in subsequent stages of the Downtown Master Plan, are discussed.

As a result of the large geographic area, transit routes in the system tend to be fairly lengthy. Improvements in the transit network to consider are introducing express routes to outer areas or major generators. Express service from key locations and communities would encourage more transit trips into downtown among commuters. This strategy should be considered along with other TDM and parking strategies to decrease long-term parking demands in downtown, and provide higher incentives for transit use over auto driving. Another element to encourage transit use among commuter is the implementation of volume discounted transit passes made available to large employers made available for purchase or as a transportation benefit to their employees.

The City should continue to pursue user-interface improvements through technology. The SAS is a significant improvement to riders who are hearing and visual impaired, or to those who are not familiar with the system, especially tourists. Additional opportunities exist in the area of user information including system-wide transit maps available online and throughout the downtown area (see Pedestrian wayfinding discussion), and trip-planner tools.

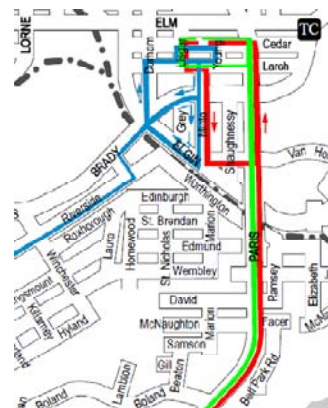
The Rack and Roll pilot project should be expanded and bike racks should be implemented across all buses and routes to encourage multi-modal travel and active transportation.

Exhibit 3.3: Sudbury Transit Downtown Coverage



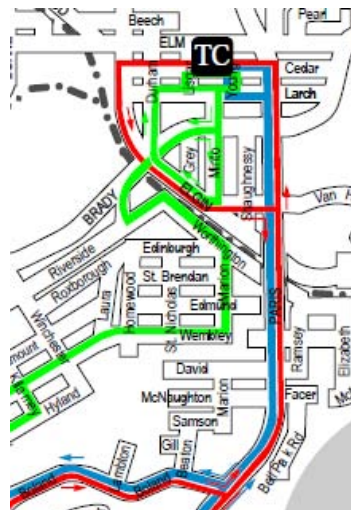
- 006** West End
- 007** North End
- 012** McKim
- 014** Kathleen / College Boreal
- 017** Donovan

Downtown Routes



- 500** University / via Paris
- 501** Regent / University
- 500x** University EXPRESS

University Routes



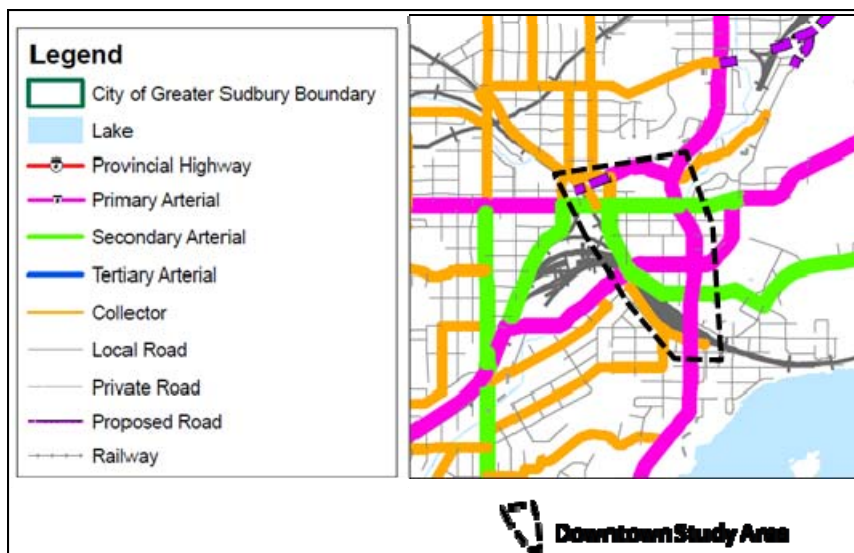
- 181** Paris / LoEten
- 182** Ramsey view / Algonquin
- 819** Copper / Four Corners

Four Corners Routes

3.5 Vehicular

In general, the vehicular level of service in and through Downtown Sudbury is good, with few locations that have recurring congestion issues. The street hierarchy is relatively clear, with a downtown loop formed by the primary arterials of Paris Street/Notre Dame Avenue and secondary arterials of Elm Street and Elgin Street. Exhibit 3.4 shows the classification of roads in the 2008 Official Plan. With the planned connection of Elm Street to Ste Anne Road via College Street as shown in the Official Plan, there would be a continuous east west primary arterial connection through the northern part of the downtown in addition to the existing east-west connection along Brady Street through the central part of the study area. Connectivity to and from the western side of the downtown is limited by the presence of the CP rail yard.

Exhibit 3.4: Road Classification from Official Plan



Within the downtown study area, one-way streets are present on the east-west pair of Larch Street and Cedar Street, and along the portion of Durham Street between Elgin Street and Elm Street. The one-way streets do not provide a continuous connection through the City and hence do not carry significant volumes through the downtown. In 2009, Cedar Street and Larch Street each carried approximately 4,500 vehicles per day, which is far less than could be accommodated by two traffic lanes. Durham Street also carried approximately 3,300 vehicles per day on two traffic lanes.

Hourly traffic volumes recorded at intersections on each of the one-way streets indicate volumes of approximately 300-400 vehicles per hour, which could easily be accommodated by one traffic lane. This suggests that there is an opportunity to investigate reallocation of some of the street space on the downtown's one-way streets, apart from Cedar Street in the immediate vicinity of the transit terminal where reductions in traffic lanes may result in manoeuvring issues for buses. For most of the sections of Larch, Cedar and Durham Streets in the study area, the road configuration is for two lanes of traffic and two lanes of parking (one parking lane on each side of the street).

3.6 Intercity Travel

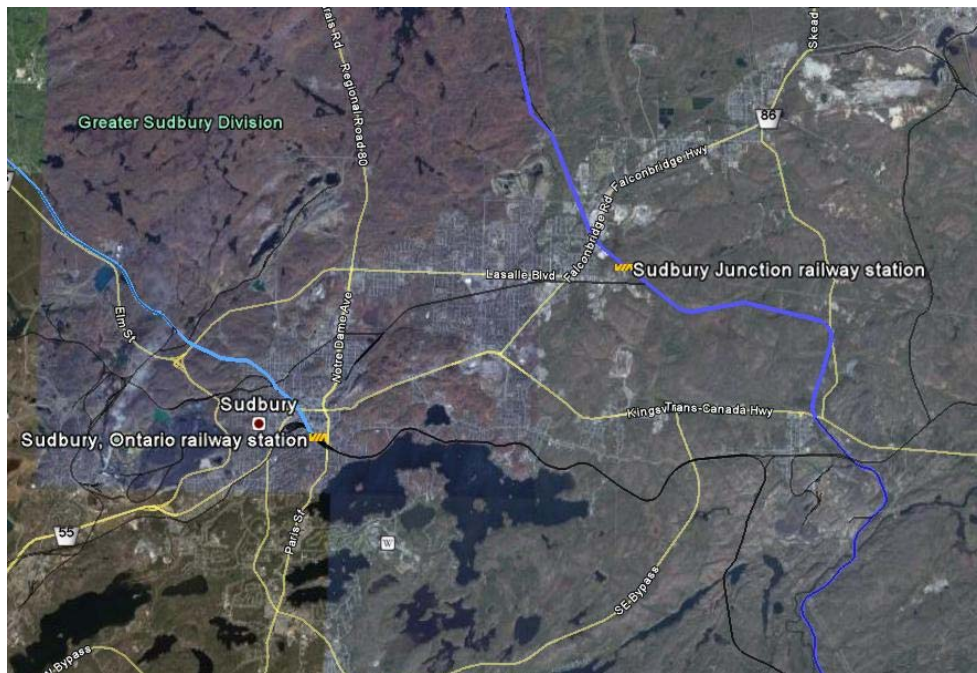
Downtown Sudbury is not well served by intercity travel and this could be considered a barrier to economic development and tourism. Intercity bus services are provided by Greyhound and Ontario

Northland, but the bus terminal is located 3 kilometres north of the downtown core. VIA Rail also serves Sudbury, but the services are not geared towards Toronto-bound trips and the main service is not located downtown (See Exhibit 3.5). The out-of-town station (Sudbury Junction station) is served by the Toronto-Vancouver service The Canadian, and the downtown station (Sudbury station) is served by the Sudbury-White River service (formerly named Lake Superior, but now unnamed). The Sudbury-White River service runs along CP's Cartier, Nemegos and White River subs, while The Canadian runs along CN's Bala sub, enabling it to serve different communities in northern Ontario. Schedules for the Toronto-Vancouver service are not suitable for Toronto travel given the trains leave at 2 AM for southbound travel and arrive at 5 AM for northbound travel.

Air travel options are improving for Sudbury, particularly with the introduction of the new Porter Air service to Toronto, but schedules remain limited.

Probably the main improvements for intercity travel over the next two decades will be the completion of the 4-laning of Highway 69 and continued air service schedule enhancements. Although it is important to protect for the possibility of connecting the downtown to a Toronto bound VIA rail service, this would either require a new rail line to be built to connect the CP line back to the northbound CN line (requiring 26 km of new track), or a service that terminates in Downtown Sudbury. Finding interim uses for the downtown train station would serve to maintain this long term possibility.

Exhibit 3.5: Intercity Rail Services



3.7 Parking

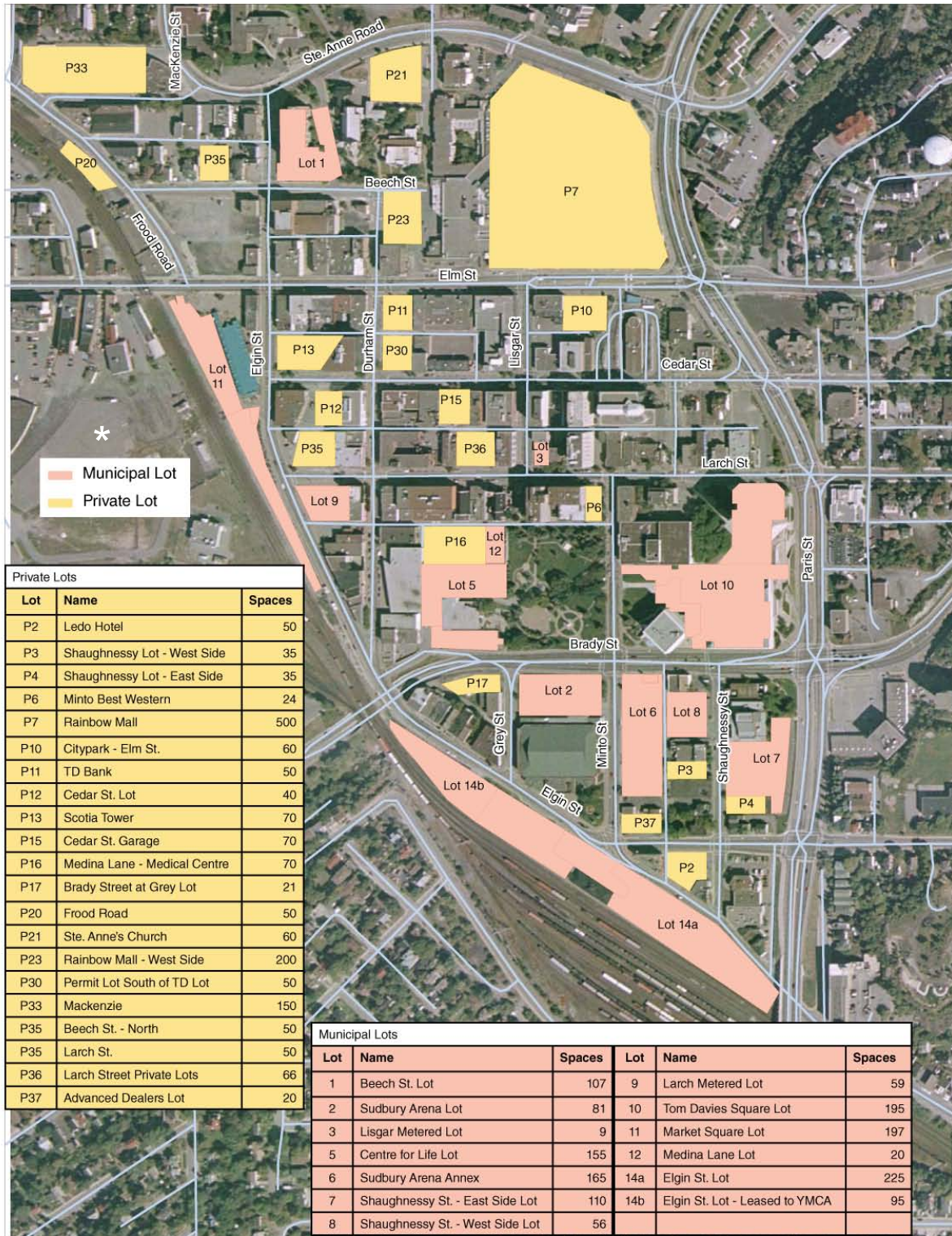
IBI Group recently completed the Strategic Parking Plan for the City of Greater Sudbury which assessed the existing and future parking needs in the Downtown area and developed a forward-looking and sustainable parking plan for the next 15-20 years. The following sections summarize the existing conditions and estimates of future demand on the parking system.

3.7.1 EXISTING SUPPLY AND UTILIZATION

As part of the Strategic Parking Plan, parking inventory and utilization surveys were carried out for all on-street public parking and for all off-street public and private parking facilities in the Downtown area. At the time of the surveys (November 2009), there were nearly 3,800 off-street and on-street parking spaces: approximately 305 on-street spaces, 1,574 off-street municipal and 1,921 private parking spaces. Public and private off-street parking lots surveyed are shown in Exhibit 3.6. This supply of parking has decreased with the redevelopment of the lot along Elm St. and Froot Road and will decrease further as surface lots are replaced by development.

The parking occupancy surveys found the overall parking systems (all municipal and private parking spaces) appeared to have sufficient capacity to meet current parking demands in Downtown Sudbury, although some issues were observed.

Exhibit 3.6: Downtown Off-street Parking Lots



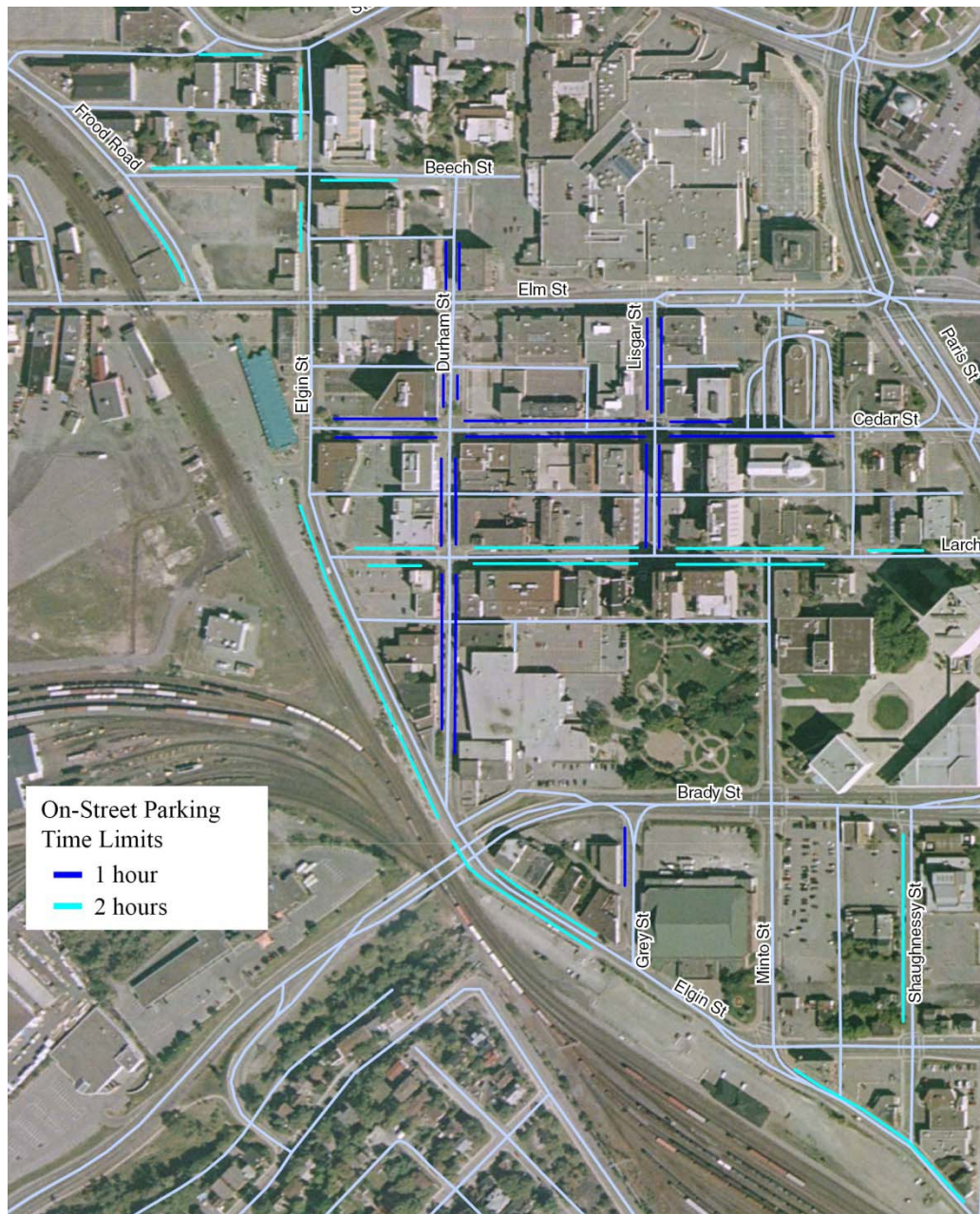
* Energy Court lot not in use and not surveyed

3.7.1.1 On-Street Parking

On-street parking supply and time limits are shown in Exhibit 3.7. On-street parking is limited to one hour for spaces on Cedar, Durham and Lisgar Streets, with the remaining spaces having a two-hour limit. Parking costs are \$1.00 per hour between 8 a.m. and 6 p.m. Parking is free after 6 p.m. and on weekends, but no overnight parking in the winter months.

On-street parking was found to be well used throughout the day. Parking in the core area, along Cedar, Larch, Durham and Lisgar Streets were observed to operate at or near capacity at some point during the day. Parking utilization rates are much lower for spaces in the outer perimeters, specifically those along Elgin St.

Exhibit 3.7: On-street Parking Supply and Time Limit



3.7.1.2 Off-Street Parking

Around 20 municipal and 21 private off-street parking lots are located in the Downtown area. Parking costs are as follows:

- \$1.00 per hour at public off-street parking lots, up to a maximum of \$5-\$12 per day depending on lot, from 8 a.m. to 6 p.m. Parking is generally free after 6 p.m. and on weekends; and,
- City monthly permits range from \$30 to \$100 depending on the lot; private monthly rates vary between \$40 and \$120.

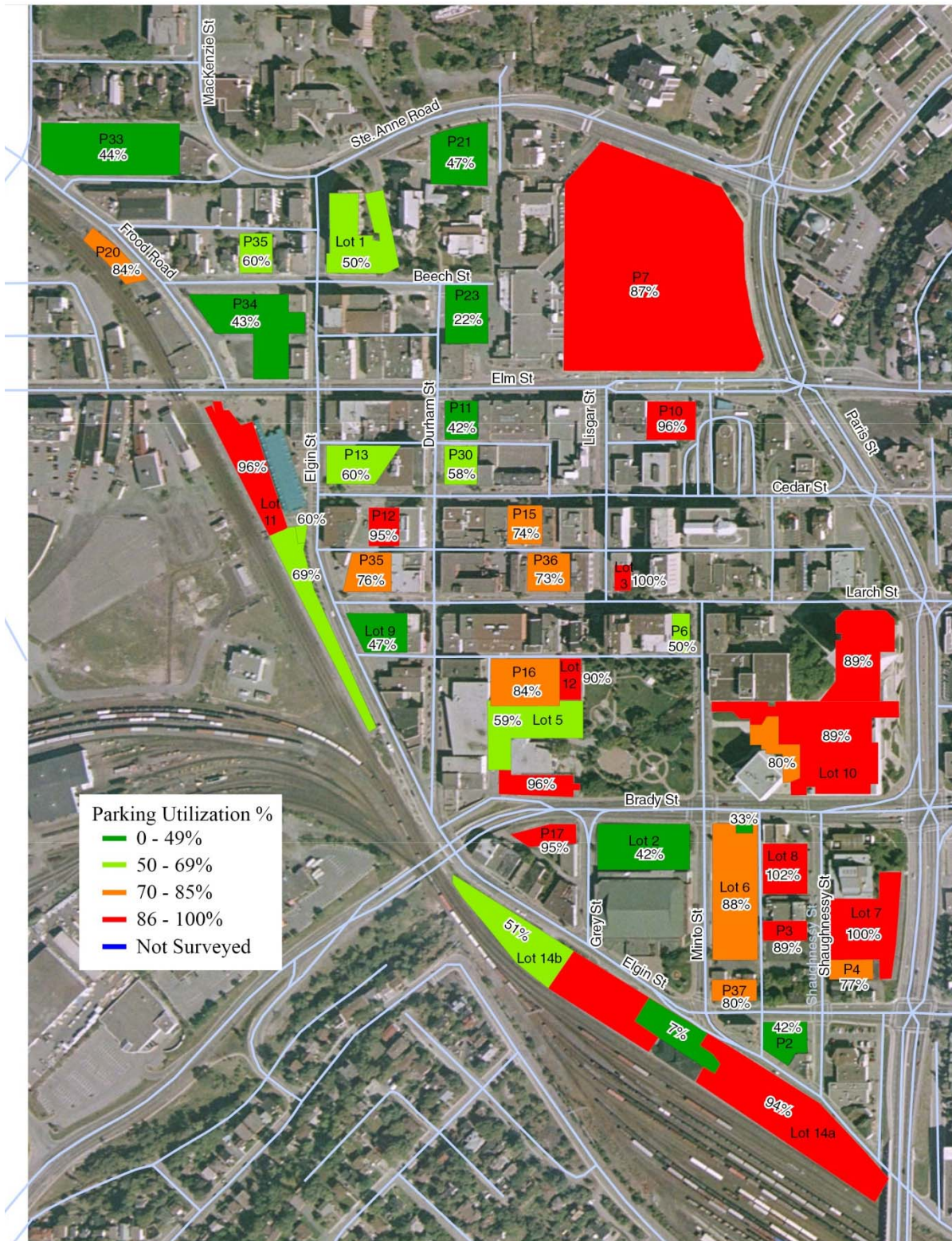
For off-street parking, capacity issues were more prevalent among the municipal lots compared to the private lots. Peak-hour utilization rates observed for all off-street lots (municipal and private) are shown in Exhibit 3.8. At the time of the parking surveys, the City-owned Energy Court lot on the west side of the CP Rail line (west of the Market Square lot) was not open for use, and is not included on Exhibit 3.8. The Energy Court lot can accommodate approximately 220 parking spaces.

Municipal lots were observed to have a high utilization rates at their respective peak hours, although some private lots not requiring a parking permit were also experiencing near capacity issues. Available capacity in the system is primarily found on private lots, which are disproportionately located in parking lots north of Larch Street. Parking demand for off-street spaces was greater for permit lots in the southern part of Downtown, with many lots having a utilization rate greater than 85% at some point during the day.

3.7.1.3 Parking Pricing

The Strategic Parking Plan occupancy surveys also found that City parking permits are the primary payment method at municipal lots in Downtown Sudbury. The low monthly rates are not only lower than the cost of parking in comparable cities, but is also a disincentive to transit use as they are generally also lower than a monthly transit pass, which is \$72 for adults.

Exhibit 3.8: Peak-Hour Utilization Rate – Off-Street Parking



3.7.2 FUTURE PARKING DEMAND

The Strategic Parking Plan estimated future parking demands based on various scenarios of population and employment growth as well as a number of potential future developments in Downtown: The Art Gallery of Sudbury, Northern Ontario School of Architecture, redevelopment of the Market Square building, and the Greater Sudbury Synergy Project.

The study estimated future parking demand for 2026 to range between 2,750 and 3,250 – a 12 to 13% increase from the existing observed peak utilization in 2009. This estimate represents an increase in demand of 300 to 800 vehicles.

With an estimated 3,260 parking spaces available to the general public, including on-street and off-street spaces but excluding restricted spaces, the future parking demand will be close to current capacity. However, this is considering supply and demand on a system-wide basis. As previously noted, available capacity is concentrated in private lots and in the north part of Downtown. Parking capacity may become an issue for lots south of Larch Street. Many of these lots are already in high demand and may be subject to additional demands arising from new developments.

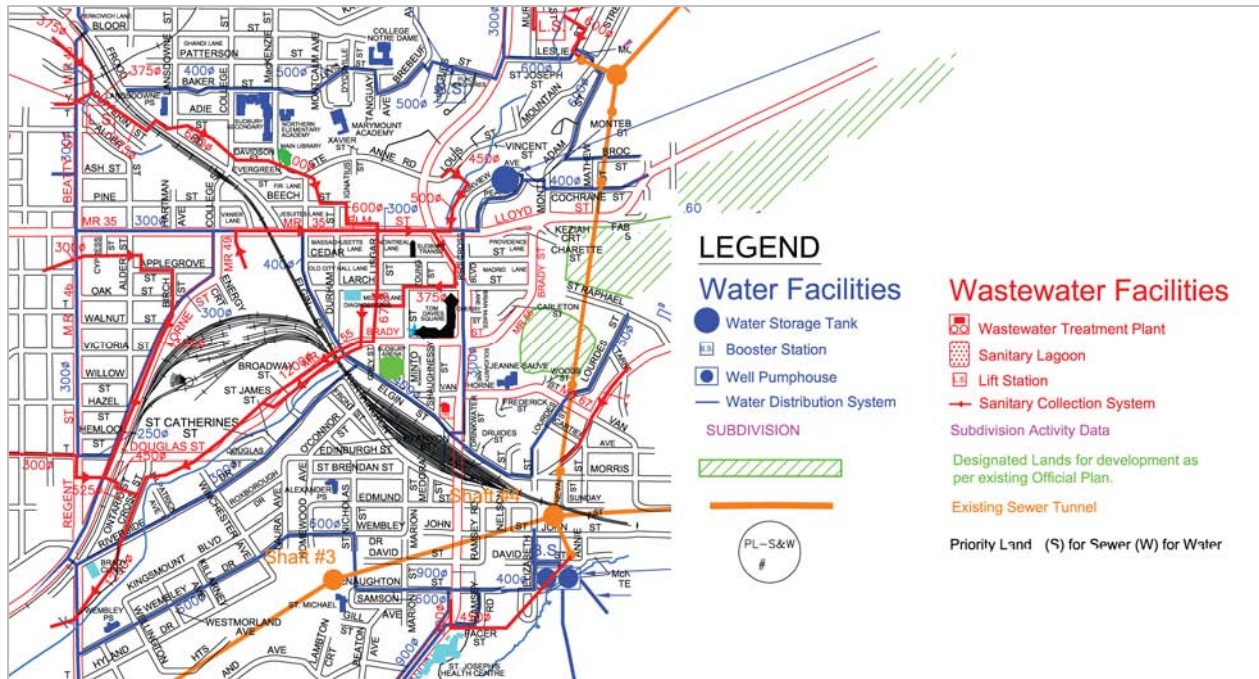
The Plan recommended that *“Based on these considerations, redevelopment of parking lots in the southeast downtown area should be considered and planned for to support future growth and development proposals, potentially consolidating at-grade surface lots into a parking structure. Provision of a structure to consolidate parking supply could free up other parking lots for development, and could be designed to meet both current and future increases in demand. The design of a parking structure should also contribute to the urban fabric and integrate the City’s vision to support high quality urban design and increased pedestrian activity”*.

Given on-street parking is highly utilized and convenient for short-term use in the downtown area, the Strategic Parking Plan discussed the addition of more on-street parking. The potential for redesign of existing spaces or addition of spaces on streets where it is currently prohibited were explored but not recommended for immediate implementation, as potential locations such as Elm Street and Paris Street are major thoroughways and changing travel lanes to parking would restrict traffic capacity.

3.8 Infrastructure

As part of the City’s review and update of their Official Plan, an Infrastructure Background Study was conducted in 2005 to analyze existing water and wastewater infrastructure systems, identify needs and opportunities, assess capacity in view of future growth and development, and identify long-term issues. The water system reviewed included water treatment plants, well systems, pump stations and the network of distribution pipes, and the wastewater system infrastructure included wastewater treatment plants, lagoons, pump stations and the network of collection pipes. Existing infrastructure is shown in Exhibit 3.9.

Exhibit 3.9: Existing Infrastructure System in Downtown Sudbury



With regards to existing conditions, the study found facilities operating under capacity and are able to meet current peak flows, and with the exception of a few areas, the existing infrastructure system has capacity to meet forecasted growth within the City. The background study identified some negative issues of fire flow and system inefficiencies, and listed 8 items to support and manage long-term growth. These items were in the following areas:

- Large scale capital projects, including the replacement or expansion of existing treatment plants and new facilities, such as the potential future development of a Lake Wanapitei water supply system to address long-term water resource needs;
- Reduction programs to address infiltration and inflow, and waterloss;
- Upgrades to pump stations and sewer collection systems; and,
- Improvements to Water and Sewer models to enhance long-term planning, as well as the City's tracking system to determine and monitor reserve capacities.

Within the downtown area, the storm system and sanitary system operate as separate systems. Storm run-off is captured from hard surfaces (e.g. rooftops, roads and parking lots), treated and released into the natural drainage system. Similarly, wastewater is captured in the sanitary system and sent to the Kelly Lake Plant for treatment.

The City intends to complete a major water and wastewater master plan in 2011, which will include an assessment of capacity issues and needs within the downtown. To date, capacity needs have assessed on a site by site basis. Generally there have been minimal capacity issues in the downtown, but this has been because growth has been slow. If there are capacity constraints, the typical process is to identify necessary upgrades and enter into a cost-sharing agreement with the developer.

In addition to traditional municipal infrastructure, there are also opportunities to expand on the success of the Sudbury District Energy Cogeneration Plant, a 5.0 MW natural gas-fired cogeneration power plant located just west of the downtown. Currently, the plant produces 4.4 MW of thermal energy in the form of steam for seven different steam hosts in downtown Sudbury but it is understood that it has capacity to serve additional users.

4. PUBLIC AND STAKEHOLDER INPUT AND IDEAS

4.1.1 STAKEHOLDER MEETINGS

From September 22-24, members of the study team held a number of interviews with various stakeholder groups. In addition, a separate meeting on transportation and parking was held on October 20, 2010 with participation from the Transit, Roads, Parking, Transportation and Traffic and Rainbow Routes. From the general stakeholder meetings, the following observations were made:

- Stakeholders had conflicting views on one-way streets
- Many transportation issues are also connected to perception issues
- There are conflicting views on whether Durham Street should be closed to traffic
- Completing the Ring Road has benefits and drawbacks, one of which is that it would place more traffic on Ste. Anne Road
- Most participants agreed more residential development in the downtown would help generate pedestrian activity
- There is a need to balance parking supply with development –there is enough parking for current needs, so supply increases need to go hand in hand with development
- There is a lack of cycling facilities downtown
- Transit not as effective as it could be

One interesting observation is that none of the stakeholder cited traffic capacity or congestion as an issue and nobody expressed major concerns about traffic volumes and speeds, except on major arterials.

4.1.2 COMMUNITY FORUM #1

The Community Vision Forum and Targeted Youth Engagement held on November 9th and 10th solicited a wide range of input. Common themes related to transportation in terms of what is working were as follows:

- Downtown Sudbury is fairly walkable
- Short blocks are good
- There are lots of cultural activities which bring people to the streets

Suggested improvements related to transportation and parking included:

- More bike parking
- Improving unsafe pedestrian crossings/intersections
- Addressing lack of intercity transit to/from downtown
- Over-coming barrier effect of rail tracks

- Addressing lack of cycling facilities
- Extending bus service hours

There were also several suggestions on long term possibilities including a potential LRT from New Sudbury to the downtown using the abandoned spur line (although the south portion of this line is now a trail). Some participants also suggested that the CP rail yards be relocated from the downtown.

5. TRANSPORTATION ISSUES AND DIRECTIONS FOR MASTER PLAN

5.1 Initial Issues Raised by City

Numerous ideas on how to improve the downtown transportation system have been raised at various times over the past decade. This section provides a brief analysis and commentary on these issues.

5.1.1 COMPLETION OF THE RING ROAD SYSTEM

The connection of College Street to Ste. Anne Road would complete a missing link in the ring road system around the downtown. This project has been on the books for a while, but still requires a Class Environmental Assessment before it can be completed. Accordingly, at best this would be a medium term improvement. It is understood that replacement of the rail bridge structure will be required in the next 10 years, and that there may be an opportunity to widen College Street and/or create more clearance at that time.

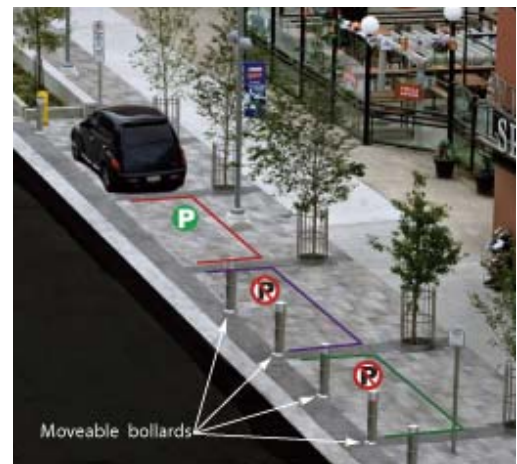
Completion of the primary arterial connection from Lorne Street/Elm Street to Ste Anne Road as shown in the Official Plan will provide an opportunity to remove some of the through traffic from Elm Street between Lorne Street and Paris Street. This in turn will provide the opportunity to review the ability to provide on-street parking on Elm Street. Previous reviews of on-street parking on Elm Street have concluded that the existing four-lane capacity on Elm Street is required to accommodate existing traffic volumes. According to data received from the City, Elm Street currently carries approximately 16,000 vehicles per day between Lorne Street and Paris Street, with peak direction volumes of up to approximately 700 vehicles per hour. Based on analysis carried out for the Official Plan, completion of the Ste Anne connection could result in 100-200 eastbound vehicles in the peak hour east of Elgin Street being relocated from Elm Street to Ste Anne Road, which would lower peak hour volumes sufficiently on Elm Street to allow the use of one lane for parking. While the creation of on-street parking is not the only justification, one factor to consider is the number of spaces that will be realized relative to the cost of the connection. Another strategy could be to create a structured parking facility in the area to meet parking demands for retailers along Elm.

5.1.2 PEDESTRIANIZATION OF DURHAM STREET

Durham Street is already quite pedestrian-friendly. It is often closed to traffic for festivals during the summer months. Some members of the community recall Durham Street was closed to traffic more permanently during the 1970's and have suggested this closure be re-instated.

Based on observations on traffic, which moves relatively slowly, it is unclear what benefits a full closure might bring. Certainly parking is very important to businesses along the street as is exposure. It is also noteworthy that many permanent street closures such as Sparks Street in Ottawa have not had the positive effect on business that was expected.

On this basis, it is not recommended that Durham Street be closed to vehicular traffic. However, it is



Flexible Parking using Moveable Boulevards, King Street Kitchener

recommended that the Master Plan explore ideas on how to maximize pedestrian space on Durham Street when required. This could include additional weekend closures or more innovative design strategies such as flexible parking. IBI Group recently designed this concept for King Street in Kitchener whereby bollards are used to restrict parking in the summer and removed to allow parking during winter months. Six months following construction the feedback has been extremely positive.

The idea of flexible streets could be extended beyond Durham Street. For example, one or more parking spaces along a street segment could be converted to bicycle parking.

5.1.3 CONVERSION OF THE ONE-WAY PAIR SYSTEM ON CEDAR AND LARCH

The conversion of Cedar and Larch is something that often comes up in discussions pertaining to the downtown transportation system. In general these streets operate fairly well as one-way streets with traffic speed being very low and pedestrians finding it easy to cross the streets. The only issue is that sometimes tourists turn the wrong way not knowing that these are one-way streets. Some of the key pre-requisites for converting streets back to two-way (e.g. high traffic speeds, poor pedestrian environment, and difficult wayfinding) do not exist on Cedar and Larch. Perhaps the only rationale for converting these streets back to two-way would be improved wayfinding and reduced traffic circulation. There would be few benefits to transit, where the current one-way nature of Cedar allows buses to enter and exit the transit terminal relatively easily.



With some creativity, one-way streets can be re-configured to enhanced conditions for active transportation without restricting vehicular mobility

Based on the existing volumes on the downtown's one-way streets, an opportunity exists to reallocate some of the road space, apart from Cedar Street in the immediate vicinity of the transit terminal where reductions in traffic lanes may result in reduced manoeuvring problems for buses. For example, one of the two traffic lanes could be reallocated to a wider sidewalk or a cycle track, while maintaining two parking lanes and one travel lane. In the context of the overall downtown vision, retaining one-way movement and reallocating road space would likely provide greater opportunities than reverting to two-way operation.

5.1.4 CALMING OF THE RING ROAD SYSTEM

In addition to considerations for Elm Street as discussed above, there is a general desire to apply treatments to Brady Street, Paris Street and Ste. Anne Road to improve pedestrian safety and comfort. A key area of focus for the Master Plan will be on improving the pedestrian environment at intersections all along the ring road system. These improvements could be stand alone, or implemented in conjunction with gateway improvements as identified in the Streetscape Master Plan.

5.1.5 OPPORTUNITIES FOR STRENGTHENING ACTIVE TRANSPORTATION CONNECTIONS TO ADJACENT NEIGHBOURHOODS

There is a significant need to improve connections to and from surrounding neighbourhoods and activities. One of the biggest opportunities would be the connection to Ramsey Lake, Bell Park, and the adjacent trail system. Another area of need is the connection across/under the rail corridor – there are no sidewalks on Brady Street under the Elgin Street bridge, and the pedestrian/cycle tunnel is viewed as being a personal safety concern. It was also noted that while the downtown transit terminal functions as a major gateway for pedestrians, it is not viewed as such by many people and there is a need to draw people from the transit terminal into the downtown as opposed simply transferring buses.

Overcoming the barrier of the railway corridor will not be easy, but sometimes extreme challenges create iconic solutions. For example, there may be an opportunity to work with the school of architecture to design a pedestrian bridge which spans the rail tracks but is made out of wood – one of the areas of interest of the school. This could be a stand alone structure, or an extension of a yet to be constructed building along the rail corridor on Elgin.



Meshing engineering, art, architecture and development could yield some interesting solutions for bridging the rail corridor and connecting adjacent communities

5.1.6 PARKING SUPPLY AND TDM

The Strategic Parking Plan recommended the consideration for a parking structure in the south area of Downtown. The structured parking would serve three objectives: replace loss of parking through development, meet future parking demands in the Downtown area and consolidate existing parking lots. There are a number of surface lots in this area and consolidation to a multi-level parking structure would free areas and promote additional redevelopment of Downtown. The parking structure should be planned as a joint-development with private, mixed-used projects to reduce costs and land-use impacts. Without a joint-development, a new parking structure with leasable retail space at the ground level was estimated to cost approximately \$35,000 per space – for a parking structure with 250 spaces, the construction costs would be approximately \$8.75 million. A joint-development strategy would significantly decrease this cost. Strict urban design guidelines should also be implemented in the construction of a large parking structure to integrate with the City’s vision to improve the aesthetics of the downtown area and increase pedestrian activity.



Parking structures provide opportunities to increase development densities and should be built to enhance urban character of the neighbourhood.

Additional Transportation Demand Management (TDM) strategies that encourage other alternatives to the automobile and reduce the growing parking demand in downtown should be further explored and implemented by the City. As previously discussed, the low cost of monthly parking in downtown creates a disincentive for commuters to use transit. Parking policies should continue to encourage

commuters to use parking lots in the periphery by pricing lots in the core area at a higher price, and should further be examined to make transit or active transportation a viable and cost-effective commuting alternative. Implementation of volume discounted transit passes by large employers would increase the share of journey-to-work transit trips and reduce the demand of monthly parking permits by daily commuters. Allowing overnight residential parking permits in the core area will also encourage residential redevelopment and reduce the need for additional supply. These TDM measures offer tools to reduce current and future parking demand and decrease the need for additional supply in the Downtown.

5.1.7 STATUS OF CP RAIL YARDS

The CP Rail Yards are a prominent feature in Downtown Sudbury. Extending along the south side of Elgin Street and then westward to Lorne Street, the rail yards essentially form the south and most of the west edge of the downtown. These rail yards are highly active and are located at the junction of CP's cross-Canada mainline and the Copper Cliff spur.

Given the prominence of these rail yards, the idea of re-locating them outside of the downtown is an idea that has been raised numerous times in the past. The rationale is that lands could be freed up for development, which could in turn help pay for the cost of relocating the yards.

In order to put some context to this idea, IBI Group conducted a review of current and potential rail lands relocation projects across Canada. Some notable case studies are as follows:

- **Regina, Saskatchewan:** CP operates an intermodal rail yard on the north side of Regina's Downtown, commonly referred to as the Warehouse District. Facilitated in part by the development of a major global trade hub outside of Regina's urban area, there are plans to abandon these yards. The cost of relocation of these rail yards is not published, but the cost of the project, which includes a new entertainment centre in place of the yards, is pegged at \$93 million. Though plans have advanced quite far, the project has not received final approval or funding.
- **Red Deer, Alberta:** Red Deer's Downtown rail yards were relocated the early 1990's and replaced with retail, residential, recreational and parkland. The total cost of this project was reported at \$72.5m of which 90% was paid for by the province and 10% by the City. Again, no breakdown of how much of this cost was due to rail removals vs. development is easily available.
- **Winnipeg, Manitoba:** CP Rail operates a major rail transfer yard in the north end of Winnipeg. For over three decades, there have been suggestions that this rail yard be relocated outside of the urban area. Although CP is planning on moving some activities to Winnipeg's new global trade hub called "Centreport", there are no active plans to move the main yard.
- **Hamilton, Ontario:** In late 2010, one of the sites proposed for Hamilton's Pan Am stadium was a small (50 acres) intermodal rail yard just outside downtown Hamilton. However, after some investigations, it was determined that the cost of moving this rail yard would be prohibitively expensive and the idea was abandon. The costs were estimated at \$70-90 million which included land purchase and remediation, and were exclusive of development costs.

Although each of the above examples is somewhat unique, there are some insights that can be applied to Sudbury. The most notable insight is that the costs of moving rail yards are significant (\$70 million in the case of Hamilton) and a large part of this is driven by increasingly stringent regulations on clean-up. The second observation is that there must be a replacement site for the

rail yard activities. In the case of Regina, the replacement site is a major trade hub project which is being driven by the province. The third observation is that there needs to be a potential for a significant “driver” of development for the newly created lands in order for there to be an economic development case. In most cases, this driver is a major residential need, which was the case for rail lands re-developments in Toronto and Vancouver, or a stadium, casino or other entertainment facility.

One notable observation on Sudbury is that, while the C.P. yards could technically be relocated, replacing the mainline tracks themselves would require a major by-pass around the City which is unlikely to happen in the foreseeable future.

5.2 Other Considerations for Master Plan

5.2.1 CREATING A CENTRAL GREENWAY

As noted previously, downtown Sudbury is lacking an active transportation corridor that links together the various activities within the downtown and in adjacent communities. The idea of creating a central greenway system is something that will be explored in the Master Plan. Elgin Street would be an ideal location to create this greenway, not only from a transportation perspective, but also from the perspective of buffering the downtown from railway activities. The central greenway would include a multi-use path, sidewalks, greenery and other amenities to draw people to this area.



5.2.2 DEVELOPING A DOWNTOWN WAY-FINDING SYSTEM

It is easy to navigate downtown Sudbury by car, but less so as a pedestrian. The idea of a downtown way-finding system that integrates information on active transportation routes, transit, parking and key activities could serve to complement many of the strategies that are being considered for the Master Plan. The development of this system would also serve to force people to think about the many activities within the downtown area. Such a concept will be developed further in subsequent stages of the Master Plan.

6. SUMMARY CONCLUSIONS AND NEXT STEPS

The City of Sudbury is sitting on a tremendous opportunity to enhance the transportation and parking system within the downtown in conjunction with growing the downtown. One of the key observations from all of the analysis to date is that the transportation system generally functions well in all respects, and therefore can be improved through incremental change. Mega projects are neither a necessity nor desirable. Essentially, by focusing efforts on pedestrians, cyclists, transit riders and retail patrons who need to park, the downtown can become a major hub for economic activity and trade.

6.1 Key Conclusions and Recommended Directions

Some of key conclusions by mode/issue are as follows:

- The **pedestrian environment** is generally quite good and is not harmed significantly by high traffic volumes or speeds, except on the primary arterials. Primary arterials also present challenges in terms of pedestrian crossings and real/perceived safety. Recommendations to improve the pedestrian environment will therefore focus on improving crossings and building on the strengths of the existing network. This will include measures to improve lighting, signage, way-finding, landscaping and accessibility.
- Conditions for **cycling** in the downtown are lacking considerably in that there are no on-road facilities and very few amenities such as bicycle parking. Notwithstanding this, most streets would be easy to bicycle on. Recommendation in this area will focus on providing some strategic and highly visible facilities within the downtown, to make a statement that cycling is encouraged. This will be supported by recommendations to enhance options for bike parking, and other amenities such as change facilities, bike stations, etc.
- Downtown Sudbury is well served by **transit** as the downtown terminal is the transfer point between most routes. The downtown terminal presence some challenges in terms of its size and the number of people and buses that pass through it, but the benefits greatly out-weight any impacts. Recommendations to improve transit will likely focus on improving user information and attracting more “choice riders” through express services or other services that compete with the private automobile. The cost differential between transit and parking (which favours driving) should also be reduced.
- **Vehicular travel** to/from and within downtown Sudbury is both easy and efficient as the primary arterial network has more than sufficient capacity to handle existing demands as well as growth. There may be opportunities to use some excess capacity for other modes, or to implement streetscape enhancement measures that benefit pedestrians.
- **Intercity travel** options to and from downtown Sudbury are limited somewhat by geography and infrastructure. Intercity bus or rail services do not include connections to the downtown and rail travel to/from Toronto is near impossible given the schedules. Air travel options are improving as are highway levels of service. Recommendations for intercity travel will likely focus on improving connections between the downtown and existing facilities.
- There is sufficient **parking supply** to meet current demand, although some lots and on-street segments experience high utilization throughout the day contributing to

perceived parking issues. Generally on-street parking operating at capacity, as it should be. Recommendations on parking supply will need to be developed in conjunction with the land use vision, but key objectives will be to maximize opportunities for shared parking, partnerships with the private sector to develop new supply where justified, and strategies to reduce commuter parking demand through TDM.

- **Municipal Infrastructure** to service growth is as or more important than transportation infrastructure. Fortunately, there appears to be sufficient capacity in terms of water and wastewater to handle existing and forecasted growth. Efforts can therefore focus on improving the condition of existing infrastructure. Sudbury also has a unique opportunity in that the Sudbury District Energy Cogeneration Plant is located just west of the downtown.

In response to issues that have been raised by City staff or the public at large over the years, preliminary recommendations are as follows:

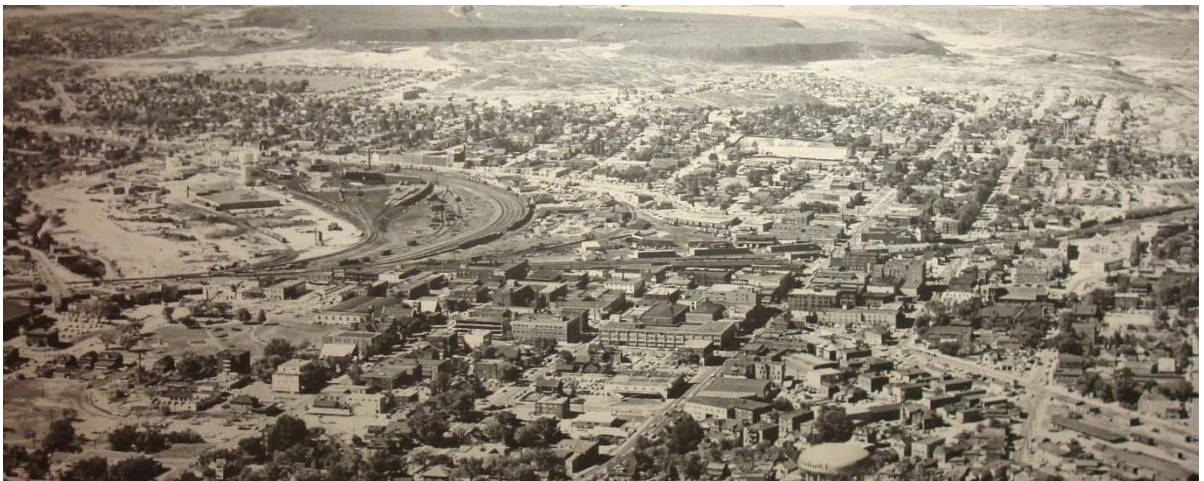
- The connection of College Street to Ste. Anne Road would effectively complete the **Ring Road system**, but it is not an essential improvement. Costs would need to be weight against benefits, and the potential impacts of additional traffic on Ste. Anne and the adjacent residential community taken into account.
- The full **pedestrianization of Durham Street** is not recommended since some traffic and parking on Durham Street is required to support businesses, and there is no indication that traffic volumes are hurting the pedestrian or business environment currently. Notwithstanding this recommendation, more frequent closures for events and/or innovative treatments to expand the pedestrian realm when required will be explored.
- **Converting Cedar and Larch to Two-way operation** is not deemed to be a priority as the one-way system does not contribute to excessive speeds or way-finding issues. Keeping the one-way street system may also provide greater opportunities to re-allocating space to non-motorized modes or parking.
- In terms of **calming the Ring Road system**, there are many improvements that can and should be made to the pedestrian crossings. In addition, options to reallocate road space on Elm Street to other uses will be explored.
- **Strengthening walking and cycling connections** to adjacent neighbourhoods emerged as a key theme in the preliminary analysis and discussions. While challenging, overcoming the barrier effect of the railway is seen as at top priority.
- **Parking supply** changes are dependent on development proposals. Some development proposals could displace existing parking. In these cases, replacement of parking with supply that can be shared by several users is critical, as is the need to reduce overall commuter parking demand.

6.2 Next Steps

The next stage of the Master Plan will start to detail what the changes to the transportation system will look like and how they might be implemented. Issues such as if and where a parking structure is required and how much existing road space should be reallocated are items that need to be consider in the context of the overall downtown development plan.

City of Greater Sudbury

DOWNTOWN SUDBURY MASTER PLAN



HERITAGE POSITION PAPER

APRIL 2011

TABLE OF CONTENTS

1.	INTRODUCTION	1
2.	KEY MESSAGES	1
3.	DOWNTOWN HERITAGE ASSETS, CHARACTER AND VALUE	2
4.	DOWNTOWN CHARACTER AREAS “PROPERTY OF CULTURAL HERITAGE VALUE AND INTEREST”	3
4.1	Elm Street Character Area	3
4.2	Durham Street Character Area	4
4.3	Cedar Street Character Area	4
4.4	Larch Street Character Area.....	4
5.	HERITAGE PRESERVATION AND PROMOTION STRATEGY	7
6.	CONSERVATION OF HERITAGE RESOURCES, IMPLEMENTATION.....	8
7.	CONCLUSIONS, NEXT STEPS.....	9

APPENDIX A: Character Area Sites

APPENDIX B: List of Heritage Properties & Location Plan

1. INTRODUCTION

The City of Sudbury has embarked on an important process to create a vision for Downtown Sudbury that secures buy-in from all levels of government and develops an action-oriented Master Plan and Action Strategy to deliver the Vision. IBI Group is working as an integral part of the Urban Strategies lead team to explore and develop ideas and actions related to the preservation, rehabilitation and adaptive re-use of cultural heritage properties in the downtown. IBI Group is also retained to provide transportation expertise.

The purpose of this report is to present the initial analysis and recommendations with respect to the significance of the remaining heritage buildings in the downtown. These properties make an important contribution to the character and authenticity of the downtown. Integration of these resources into the regeneration initiatives that are recommended in the Master Plan is the basis of cultural, environmental and economic sustainability for downtown Sudbury. Specifically, the report includes the following:

- Key heritage messages,
- A review of downtown heritage assets,
- Downtown character areas,
- A heritage preservation strategy,
- Recommendations for implementation.

2. KEY MESSAGES

The following comments/messages are based a review of background documents, discussions with the Sudbury Municipal Heritage Committee, City Staff and consultant team members and reflect a deep commitment to a sustainable downtown.

Sudbury has a **unique heritage and identity**. The story of this identity can be communicated through the language of its architecture. The preservation of this heritage helps to tell the story of its people and to define the place that they live in. Too much of this heritage story has been **lost** and the voices of the past silenced.

The entire downtown should be designated a '**special character area**' and all cultural heritage resources should be identified and protected and no further demolition should occur until the master plan is complete. This differs from a Heritage Conservation District, which would be difficult to support and unnecessarily restrictive.

Heritage planning is one of the critical elements for a sustainable community, along with economic viability, energy and resource conservation and public transportation. The building that is preserved and reused is one of the most sustainable buildings that is built.

The City should develop **detailed guidelines** for the intensification, preservation of heritage resources and redevelopment of the downtown.

The story layers that define Sudbury include, the First Peoples' Story, the French / Jesuit settlements, the English story, the clear cutting of the first growth White Pine forests to supply wood for the rebuilding of Chicago, the Railway story, the CPR 1887 plan, growth and prosperity, the

mining story, the back story to Sudbury being the capital of the North. Methods must be developed to tell these stories downtown.

The economic viability of heritage preservation requires REAL incentives to support property owners – tax breaks, grants, innovative leasing and ownership models, supportive zoning etc.

There is not enough **landscaped park and open space** that can be used to define downtown heritage resources.

A pro-active City should aggressively and inventively seek to attract new commercial, educational, institutional, recreational and residential uses to re-animate the remaining inventory of heritage buildings and development sites downtown.

Access and linkages to the downtown need improvement. The streets could be normalized, connections to the surrounding residential areas like bike paths, bridges etc, should be considered and a parking strategy need to be implemented to eliminate surface parking or otherwise define the street edge architecturally.

Sudbury is a Winter City, every effort must be made to make the downtown easier for people to move about, from buildings to cars and buses. Ideas like heated sidewalks, and a better snow removal system, sheltered walkways, a downtown jump on, jump off shuttle should be explored.

Sudbury is a Water City characterized by the large number of lakes within its borders. There is no reflection of this downtown, Ramsey Lake is invisible from the downtown and the two downtown creeks have been buried. Explore ways to celebrate water/ice downtown.

Topography – the downtown is in a bowl surrounded by hills, two with iconic water towers, can this setting be enhanced, defined even made more dramatic?

3. DOWNTOWN HERITAGE ASSETS, CHARACTER AND VALUE

The downtown is topographically definable within the hills that surround it. It is also defined by the railway lands and the original 1887 street grid. The concentration of the commercial and institutional buildings, ranging from the early and mid- 20th century, manages to communicate the idea of **the downtown as the civic and commercial heart of Sudbury**. This wealth of brick and stone, downtown buildings from the 1920's to the 1950's is an eloquent statement of Sudbury's history of **confidence and prosperity**. The heritage buildings reflect these attributes.

The shift of population and commercial activity from the downtown and the general decline over the last three decades has resulted in the demolition and under use of significant portions of this heritage.

Sudbury's challenge with respect to its downtown heritage resources is three-fold;

1. Find sustainable uses to re-animate the existing heritage buildings that conserve their heritage character and attributes.
2. Encourage sustainable, new infill development that is compatible with and supports these heritage assets.
3. Preserve and communicate the intangible heritage assets as well.

A socially, culturally and economically viable downtown will have authentic temporal depth, a rich cultural character and a dynamic economy that will reflect a successful balancing of these challenges.

Sudbury's heritage assets consist of the **tangible** – the topography, the street grid, the railway lands, the buildings and open spaces, as well as the **intangible** – the hidden streams, invisible lakes and buildings that have gone, the stories of the lives of the people that came before, and civic ambitions and confidence.

These remaining tangible heritage assets **must** be preserved, adapted and reused and the intangible assets must be interpreted and remembered.

Under Section 27(1) of the Ontario Heritage Act, a municipality is required to keep a current register of **properties of cultural heritage value or interest** situated in their municipality. The City of Sudbury, with the Municipal Heritage Committee has provided the study team with a list of 64 properties that are located within the downtown Sudbury study area that they consider to possess heritage value or interest. The list, with photographs and a location plan are included in Appendix C.

Given that all of these properties have been identified as having cultural heritage value or interest by the SMHC, for the purposes of the Downtown Master Plan we have organized these properties of interest into 3 categories. This typology is adapted from the Ontario Regulation 9/06 and is intended to not only reflect their heritage value but to reflect as well the properties' ability to support the regeneration of the downtown and their contribution to their immediate urban context.

1. **Design/Physical Value** -Architecturally, historically significant, defines and contributes to their urban context
2. **Historical/Associative Value** - Architecturally, historically significant, isolated from an urban context.
3. **Contextual Value** - Their architectural and historical character contributes to their immediate urban context.

4. DOWNTOWN CHARACTER AREAS "PROPERTY OF CULTURAL HERITAGE VALUE AND INTEREST"

As a method of understanding and planning for a renewed downtown we have grouped downtown Sudbury's, "properties of cultural heritage value or interest", into 4 character areas that generally correspond to the streets where they are located. Each character area has properties that fit into our contribution categories, 1- Design/Physical Value, 2 – Historical / Associative Value or 3- Contextual Value. In most cases, the buildings that form these areas are categorized, as '1' i.e. they are architecturally historically significant, and define and contribute to their urban context.

The following indicates which of the properties on the City/ SMHC list are located within each of the four character areas. Many of the other buildings in each area, though not on the City list or noted below would fit into contribution category 3, as having contextual value.

4.1 Elm Street Character Area

- 80 Elm St, the Sterling Silver Bank (1);
- 49 Elgin St., the corner of Elm and Elgin Streets, CNCP Telecommunications Building and Market Square (1);
- 73 Elm St., the Muirhead Building (1);
- 67 Elm St., the Silverman's Building (1);
- 56 Elm St., the Maki Building (1);
- 24 Elgin St., the Grand Theatre (1);
- 25 Elgin St., former DeMarco Building (1).

Standing at the corner of Elm and Elgin Streets, these 7 masonry buildings are all visible from this location and speak to the diverse commercial history that once characterized the entire downtown. Each echoes a fundamental element of a vigorous city, banking, railways and communication, retail, hotels and theatre, spanning the first half of the 20th century. This collection of architectural

and historic stories in this area is probably the most cohesive part of the downtown from a heritage perspective.

4.2 Durham Street Character Area

- 30 Beech St., Christ the King Church and Rectory (1);
- 14, 32 Beech St., Paroisse Ste-Anne des Pins and Rectory.
- 56 Elm St., the corner of Elm and Durham (1);
- 57 Durham St., Scotia Tower (1);
- 86 Durham St., the Coulson Hotel (1);
- 93 Durham St., the Stafford Block (1);
- 118 Durham St., the Northern Ontario Building (1);
- 135 Durham St., Roy's Furniture (1);
- 143 Durham St., the Moses Block (1);

The five block Durham Street character area is the longest area and most diverse. Beginning with Christ the King Church and Rectory from the 1920's at the top or north end, it crosses Elm, with the Maki building at the corner. Except for the recent Scotia tower it's not until the block between Cedar and Larch that coherent built form emerges. The 1937 Coulson Hotel and the earlier, former T. Eaton's, the Northern Ontario and Roy's Furniture buildings provide a clear sense of scale and built form that typifies the mid-century commercial heart of Sudbury. The diversity of the area continues with the exciting new YMCA ending at the flatiron, Moses Block.

4.3 Cedar Street Character Area

- 7 Cedar St., the Rothschild Block (1);
- 83 Cedar St., the Old City Hall (1);
- 93 Cedar St., Bell Building (1);
- 127 Cedar St., the Twin Towers (3).

The Cedar Street character area is the most discontinuous area that is partially defined by default with its location between Elm and Larch with Durham running through it. It is anchored on the west by the former LCBO, and except for Old City Hall and the Bell Building, all of which qualify as 1's, and the Twin towers as contextually important number 3's, the area is broken up by a parking structure and lots and the bus station.

4.4 Larch Street Character Area

- 93 Durham St., the Stafford Block, the corner of Durham and Larch Streets (1);
- 86 Durham St., the Coulson Hotel, the corner of Durham and Larch Streets (1);
- 75 Larch St., Knox Presbyterian Church (1);
- 85 Larch St., Church of the Epiphany (Designated);
- 111 Larch St. St. Andrew's Place (2).

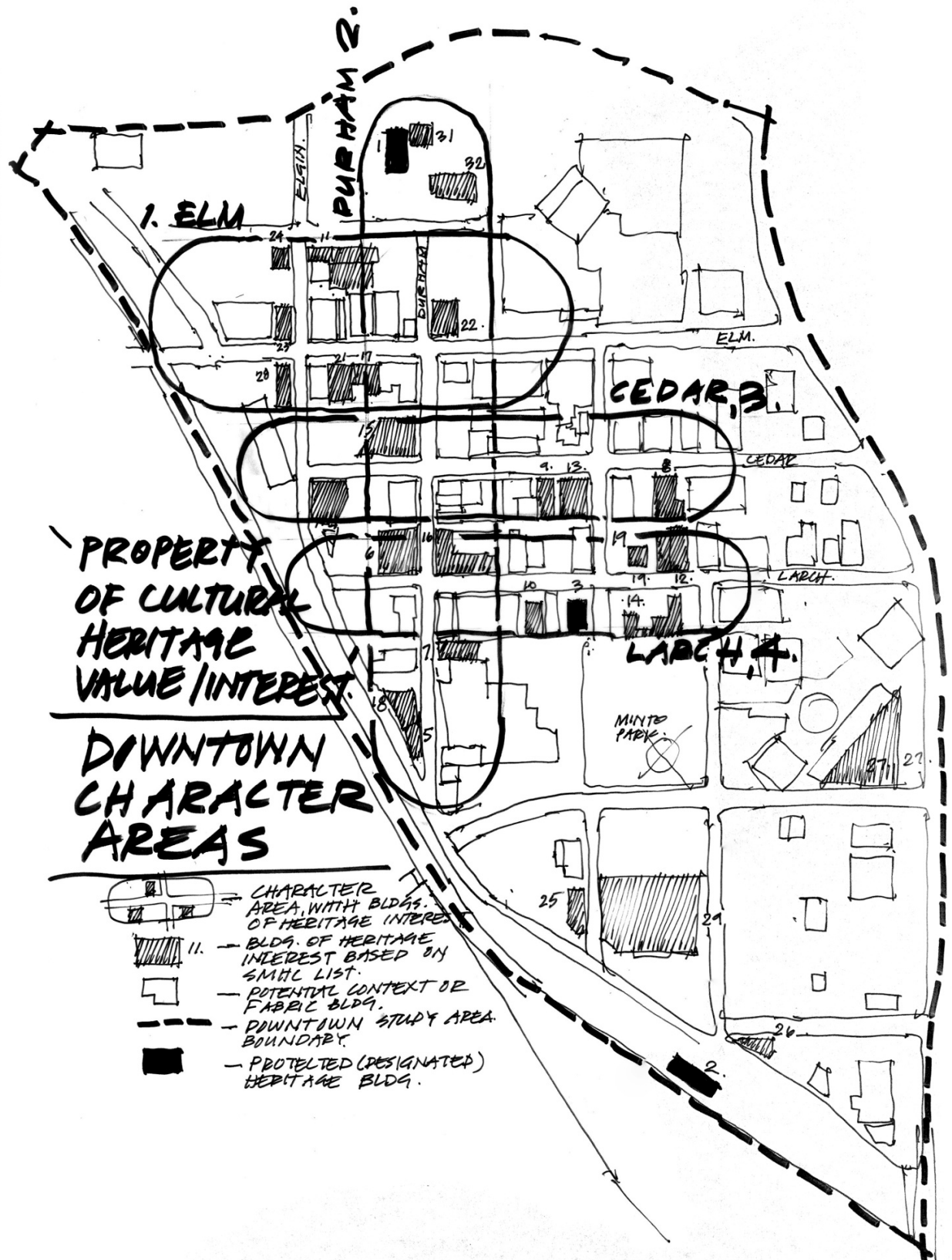
The Larch Street character area is similar to the Cedar area in that it is connected to and borrows from Durham Street and is defined in a large part by its location downtown. Except for the two churches on the south side, the urban/built-form fabric does not make a significant contribution to the character of the downtown.

It is significant that each of these 4 character areas consist of a series of single large buildings or groups of smaller buildings that have a strong street presence and character that help to define that particular area. Being street related and linear, the character areas overlap at corners and are interconnected, often sharing the same buildings.

For the purposes of the Downtown Master Plan these four areas can be seen as the **framework and structure** that reinforces the grid of downtown streets. These character areas are anchored and defined by the 20-25 architecturally and historically significant buildings, located within each as noted above. It is this Design / Physical Value or architectural character, form and massing that will form **the basis for urban design and architectural guidelines** for infill development projects in and around these specific character areas. Adjacent buildings in each area, though not listed in the SMHC list, are 'fabric' buildings that are important for their contextual contribution to the street and character area and should be preserved and adaptively reused as well.

See Appendix A: Character Area Sites – for photographs of each building within the 4 character sites.

Outside of these four character areas there may be 4-6 category '2' properties that are architecturally and historically significant buildings that are distinct from their immediate urban context. These stand alone buildings do not fit easily into a character area and often have the potential to be an anchor for new development, for example the Sudbury Community Arena.



5. HERITAGE PRESERVATION AND PROMOTION STRATEGY

Based on the 4 overlapping core areas of special interest or 'Character Areas' the following is a recommended action list which is intended to support the Heritage Preservation and Promotion Strategy.

- 1) The Downtown Master Plan shall preserve and enhance downtown Sudbury as the **historic cultural and commercial regional hub of north-eastern Ontario**.
- 2) The City should consider an **Interim Control By-Law** to be put into place to prevent further demolition or alteration of any building or structure within the downtown area until the detailed Downtown Vision, Plan and Action Strategy has been completed and accepted by the City of Sudbury and other, more permanent planning controls are in place.
- 3) The SMHC and the City shall, as soon as possible, review the 'long list' to assign a '1, 2, 3' category designation to the inventory as an immediate, interim step. This inventory should locate and provide addresses, a brief history and a statement of the buildings and structures cultural heritage significance within the community.
- 4) The SMHC and City shall compile a summary of the downtown '**Sudbury Stories**'. These story layers would include the stories of - the First People, the French, the English, of the railways, deforestation, mining, union struggles etc. The community should develop a program to collect and communicate these stories. Each story could have a **real or symbolic element or presence** within the downtown that would contribute to the vision and speak for the past. **Properties that have been demolished** that have contributed to the heritage character or history of the downtown, , should be identified publicly to help tell the story of the community, e.g. the Nickel Range Hotel, D'Youville Orphanage, the King Edward Hotel, as well as open spaces such as Memorial Park.
- 5) The Downtown Master Plan should include '**Real**' incentives for building owners to invest in the restoration and adaptive reuse of their properties that support the preservation of the built heritage that is the foundation for a renewed downtown. These could include:
 - a direct reduction in municipal property taxes that would be based on degree and quality of preservation efforts - the greater the investment and preservation success the lower the taxes;
 - the current ZBL permits unlimited height and density Downtown and does not require parking for non-residential and new residential uses created through the conversion of a building that is a least five years old. The height and density aspects should be reviewed in conjunction with a revised Secondary Plan ;
 - a reduction or elimination of parking requirements based on heritage preservation successful efforts;
 - façade restoration grants, and or loans from the City;
 - renovated, upgraded downtown heritage building could be the first choice for municipal overflow office space or public agencies or boards of all kinds;
 - new users looking to establish a business in Sudbury could be encouraged by the City to locate downtown in a heritage building.
- 6) Building on work undertaken for the Downtown, the City should prepare detailed urban design guidelines that can inform **Secondary Plan** guidelines that preserve and enhance the public realm protecting the unique heritage characteristics of the pedestrian-oriented environment and historic grid street pattern that is typical of Downtown Sudbury.

- 7) The City can designate the downtown core, or at a minimum the 4 character areas, as an **Area or Areas of Special Interest**. In a new **Secondary Plan**, using clear language to identify the special character, and with design guidelines forming part of the plan, the City can create a **framework of protection** for the buildings of cultural heritage interest as well as the contextually valuable buildings. Under this area designation these urban design and planning guidelines can establish the scale, height, massing, set-backs, view shed protection, shadowing etc. for new infill projects compatible with the heritage resources. These guidelines could extend into the surrounding City neighbourhoods to protect important vistas and views to and from the downtown as well.

6. CONSERVATION OF HERITAGE RESOURCES, IMPLEMENTATION

This section is intended to suggest a method of reconciling the community's desire for the recognition, preservation, and some degree of celebration of their heritage with the realities of development and rate of economic growth today. The 2005 Provincial Policy Statement is clear about heritage objectives, the following suggests methods.

- 1) The Provincial Policy Statement, 2005, Section 2.6.1 states the following, "Significant built heritage resources and significant cultural heritage landscapes shall be conserved."
- 2) PPS Section 2.6.3 states the following; Development and site alterations may be permitted on adjacent lands to protected heritage property where the proposed development and site alteration has been evaluated and it has been demonstrated that the heritage attributes of the protected heritage property will be conserved. Mitigating measures and/or alternative development approaches may be required in order to conserve the heritage attributes of the protected heritage property affected by the adjacent development or site alteration."
- 3) Given the PPS position with regard to the conservation and protection of heritage resources, and given that the downtown buildings that are potentially able to be designated are relatively few in number and scattered throughout the study area, we recommend that the four character areas, described earlier, be recognized for their contribution to the skeleton or structure of the downtown today. There are **20-25 buildings** within these four areas that are vitally important as anchors and as significant architectural and historical evidence of Sudbury's heritage of pride and vitality. It is our belief that a Heritage Conservation District designation for the historic 1887 Plan area, which covers most of the downtown core, would be difficult to support and unnecessarily restrictive.
- 4) It is our recommendation that the objectives of conserving Sudbury's heritage resources as well as supporting the redevelopment of the downtown can be met by the combination of a **Secondary Plan** that clearly identifies Areas of Special Identity within the downtown as well as the **Designation** of these 20-25 individual buildings and structures within the study area.

Under Section 29 of the OHA, there are six steps to designate individual properties:

- (i) Identify the property
 - (ii) Research and evaluation
 - (iii) Notice of intention to designate
 - (iv) Passing and registering the designation By-law
 - (v) Listing the property on the Municipal Register
 - (vi) Listing on the Provincial Register.
- 5) The Parks Canada "Standards and Guidelines, for the conservation of Historic Places in Canada" should be used as a basis for the conservation of all "Buildings of cultural heritage value and interest."

7. CONCLUSIONS AND NEXT STEPS

The groups of Sudbury's heritage buildings, in pockets along major downtown streets are eloquent statements of confidence and prosperity from the City's rich history. Their preservation and re-use will be the basis for a culturally rich and economically dynamic downtown. The next stage in this process is to identify uses for these buildings and to create guidelines for infill development around them.

APPENDIX A

CHARACTER AREA SITES

1. Elm Street Character Area

Sterling Silver Bank

80 Elm Street

#23 SMHC List



CNCP Telecommunications Building

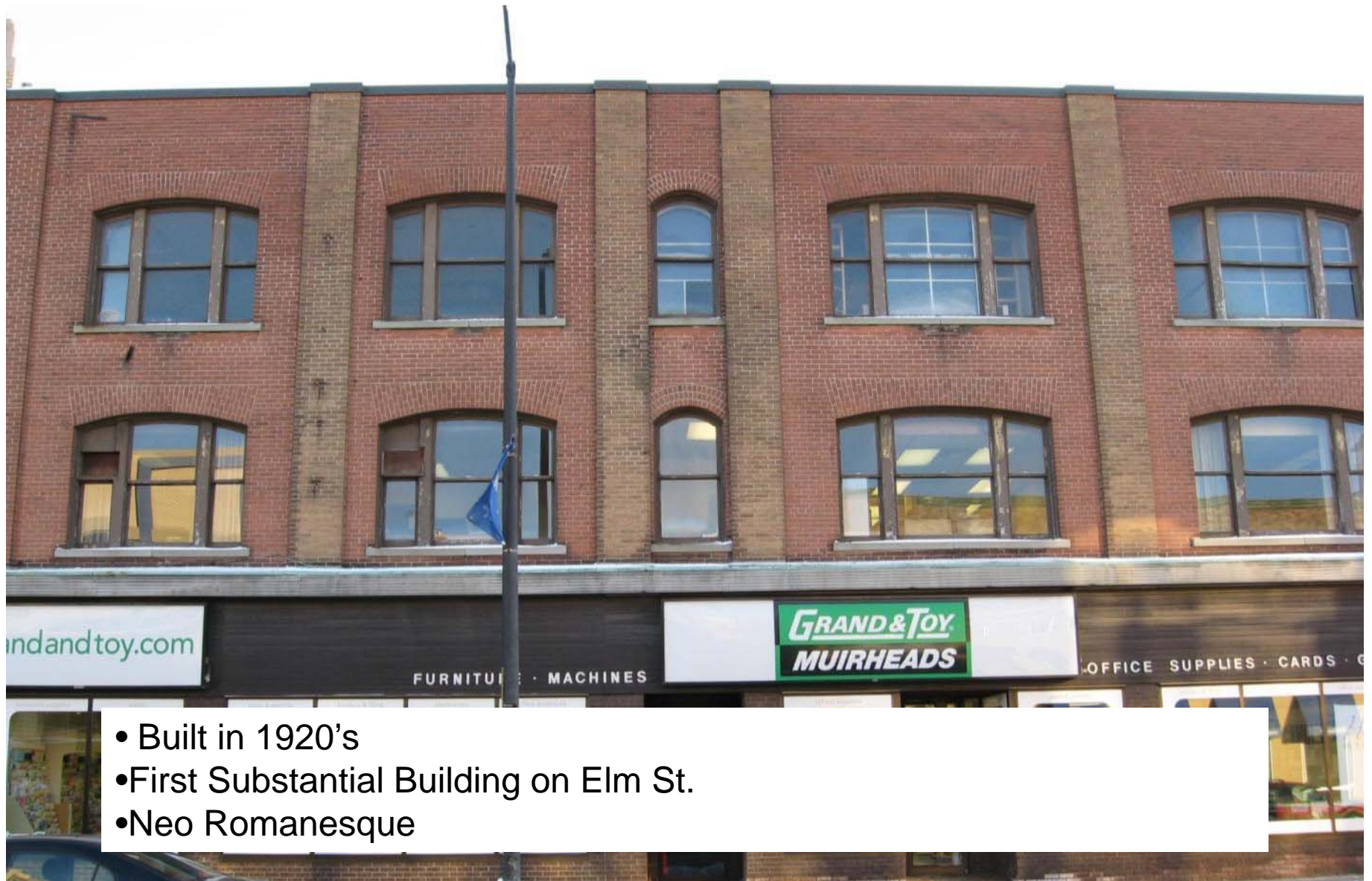
49 Elgin Street #28 SMHC List



Muirhead Building

73 Elm Street

#21 SMHC List



- Built in 1920's
- First Substantial Building on Elm St.
- Neo Romanesque

Silverman Building

67 Elm Street

#17 SMHC List



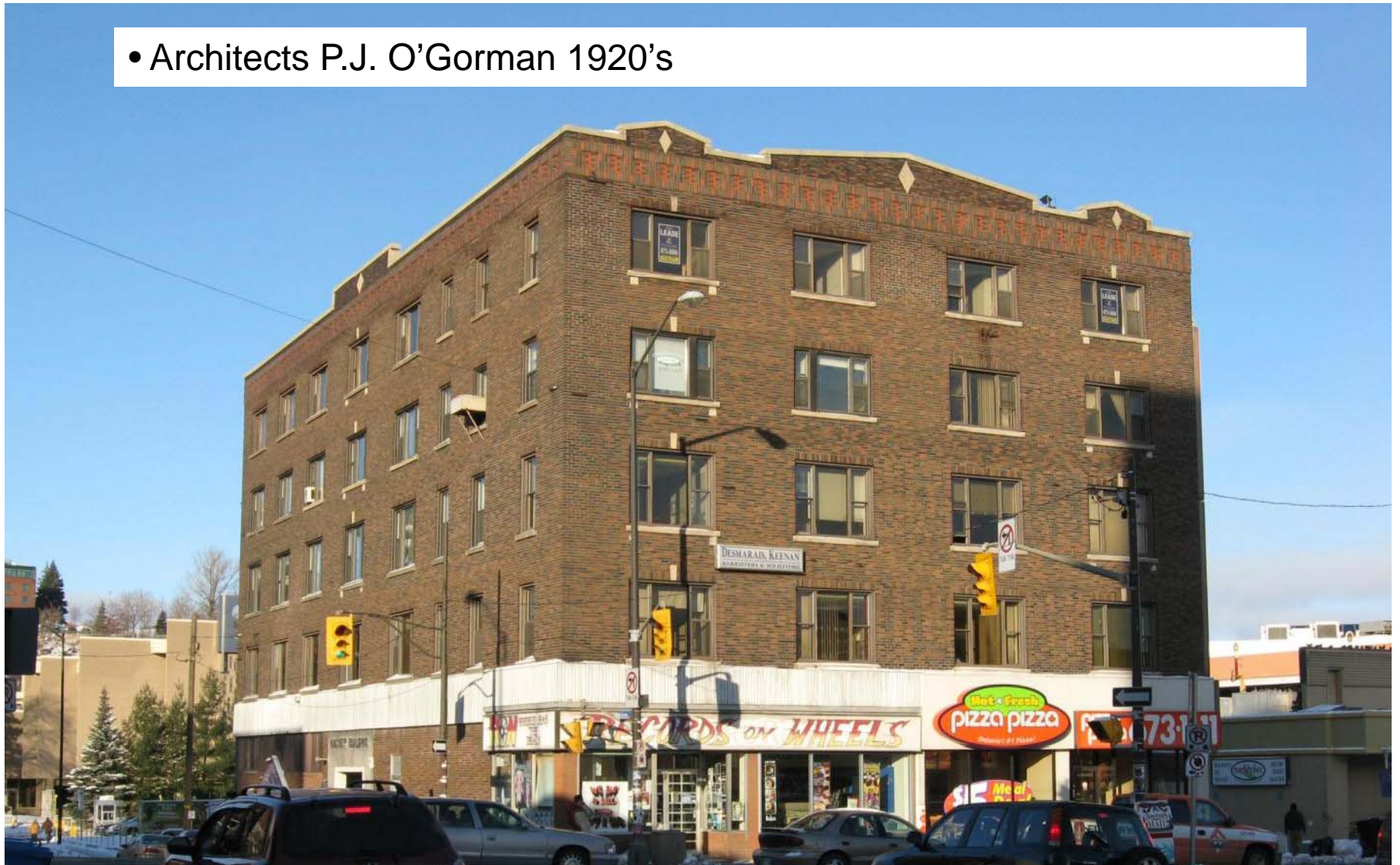
- Art deco
- Department store owned by local family

Maki Building

56 Elm Street

#22 SMHC List

- Architects P.J. O’Gorman 1920’s



Former Demarco Building

25 Elgin Street

#24 SMHC List



- Architect L.N. Fabbro constructed 1950 +/-

Grand Theatre

24 Elgin Street #11 SMHC List

- Original use was an “Opera House” then converted to Cinema
- In 1950, a Timmins entrepreneur had building re-vamped into 2 cinemas (Empire Theatre) with the stage house & Elgin St. converted to commercial at grade and office spaces above.



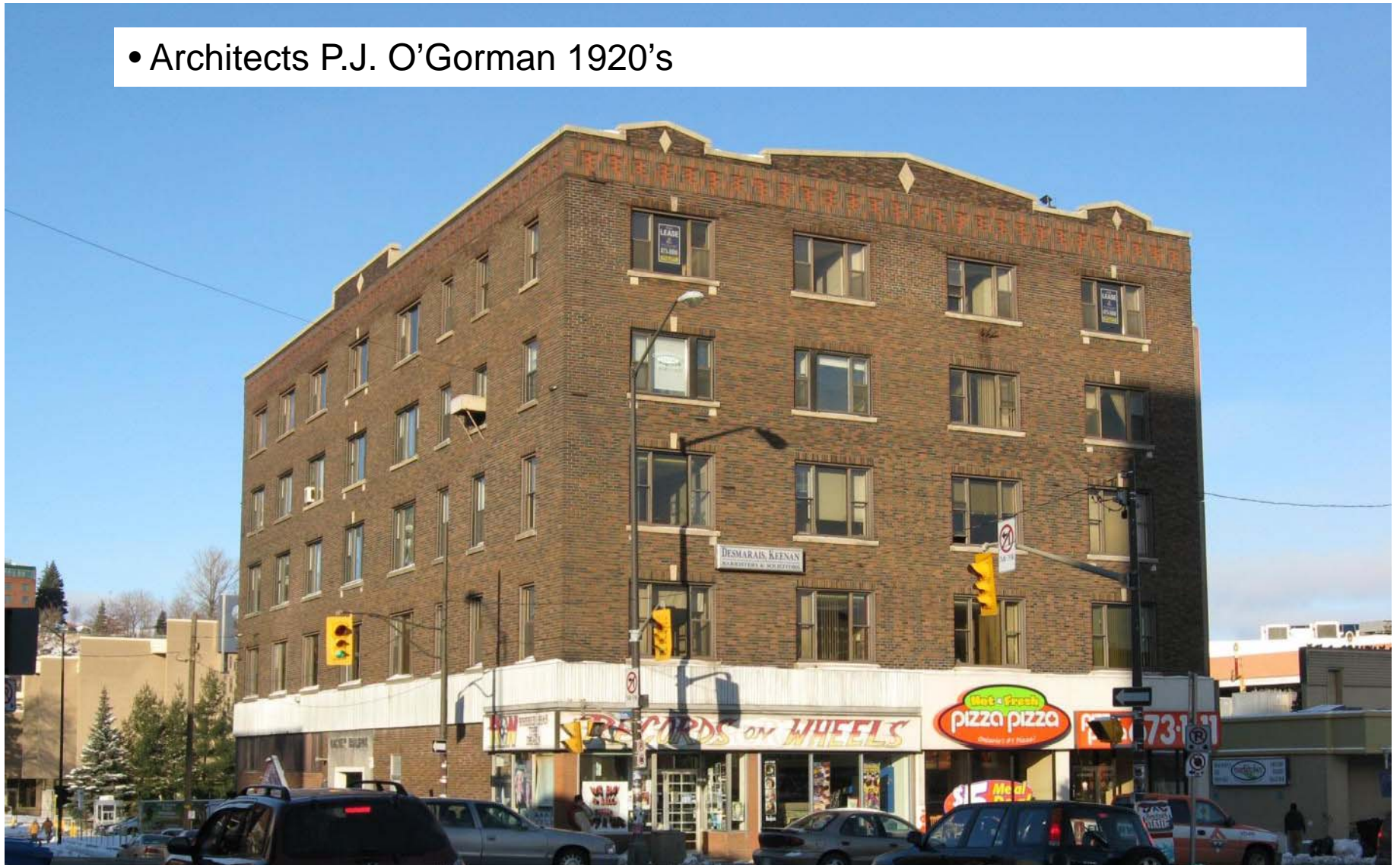
2. Durham Street Character Area

Maki Building

56 Elm Street

#22 SMHC List

- Architects P.J. O’Gorman 1920’s



Scotia Tower

57 Durham Street

#15 SMHC List



- Architect – Akos Frick
- Site originally was Cochran-Dunlop Hardware Company

Coulson Hotel

86 Durham Street

#16 SMHC List

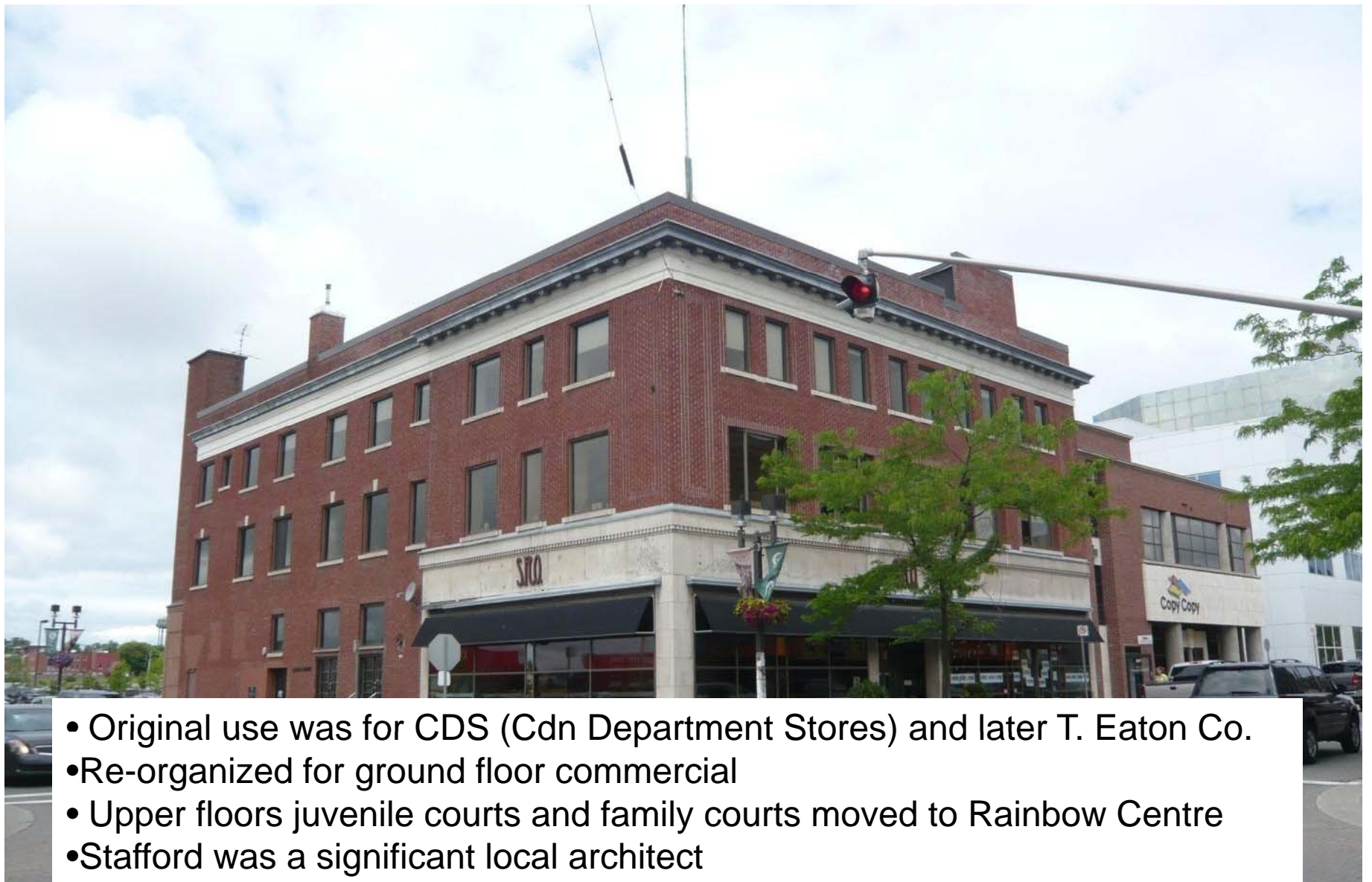


- Original site of North-American Hotel destroyed by fire about 1937
- Coulson Hotel replaced it on the same site shortly thereafter.
- Art Deco

Stafford Block

93 Durham Street

#6 SMHC List



- Original use was for CDS (Cdn Department Stores) and later T. Eaton Co.
- Re-organized for ground floor commercial
- Upper floors juvenile courts and family courts moved to Rainbow Centre
- Stafford was a significant local architect

Northern Ontario Building

118 Durham Street
#7 SMHC List



Roy's Furniture

135 Durham Street

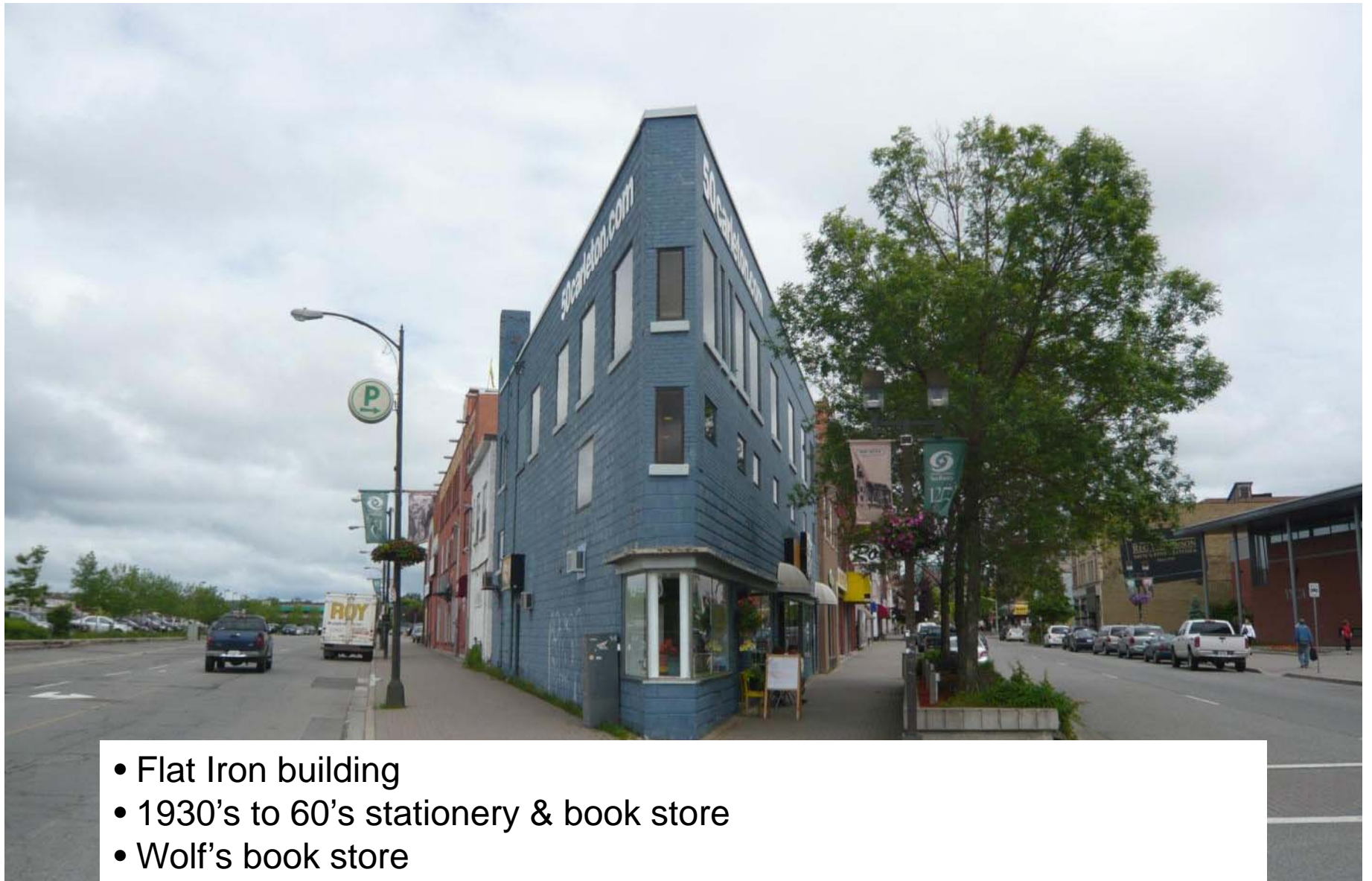
#18 SMHC List



Moses Block

143 Durham Street

#5 SMHC List



- Flat Iron building
- 1930's to 60's stationery & book store
- Wolf's book store

Christ the King Church

30 Beech Street #1 SMHC List



- Original architect PJ O’Gorman
- 1920’s Construction
- One of the early Catholic churches
- Romanesque design
- Relatively intact
- * Fire destroyed nave in 30’s
- * Was rebuilt in late ‘50s
- * L.N. Fabbro was rebuild Arch.

Christ the King Rectory

30 Beech Street #1 SMHC List



•1920's Construction

3. Cedar Street Character Area

Rothschild Block

7 Cedar Street

#20 SMHC List



- Original LCBO

Old City Hall

83 Cedar Street #9 SMHC List



Bell Building

93 Cedar Street #13 SMHC List



Twin Towers

127 Cedar Street / 128 Larch Street

#8 & 12 SMHC List

- General leasehold buildings
- Architect – Townend, Stefura, Baleshta late 1960's
- Built by Acme Bldg & construction
- Both Cedar St & Larch St bldg constructed consecutively

4. Larch Street Character Area

Stafford Block

93 Durham Street

#6 SMHC List



- Original use was for CDS (Cdn Department Stores) and later T. Eaton Co.
- Re-organized for ground floor commercial
- Upper floors juvenile courts and family courts moved to Rainbow Centre
- Stafford was a significant local architect

Coulson Hotel

86 Durham Street

#16 SMHC List

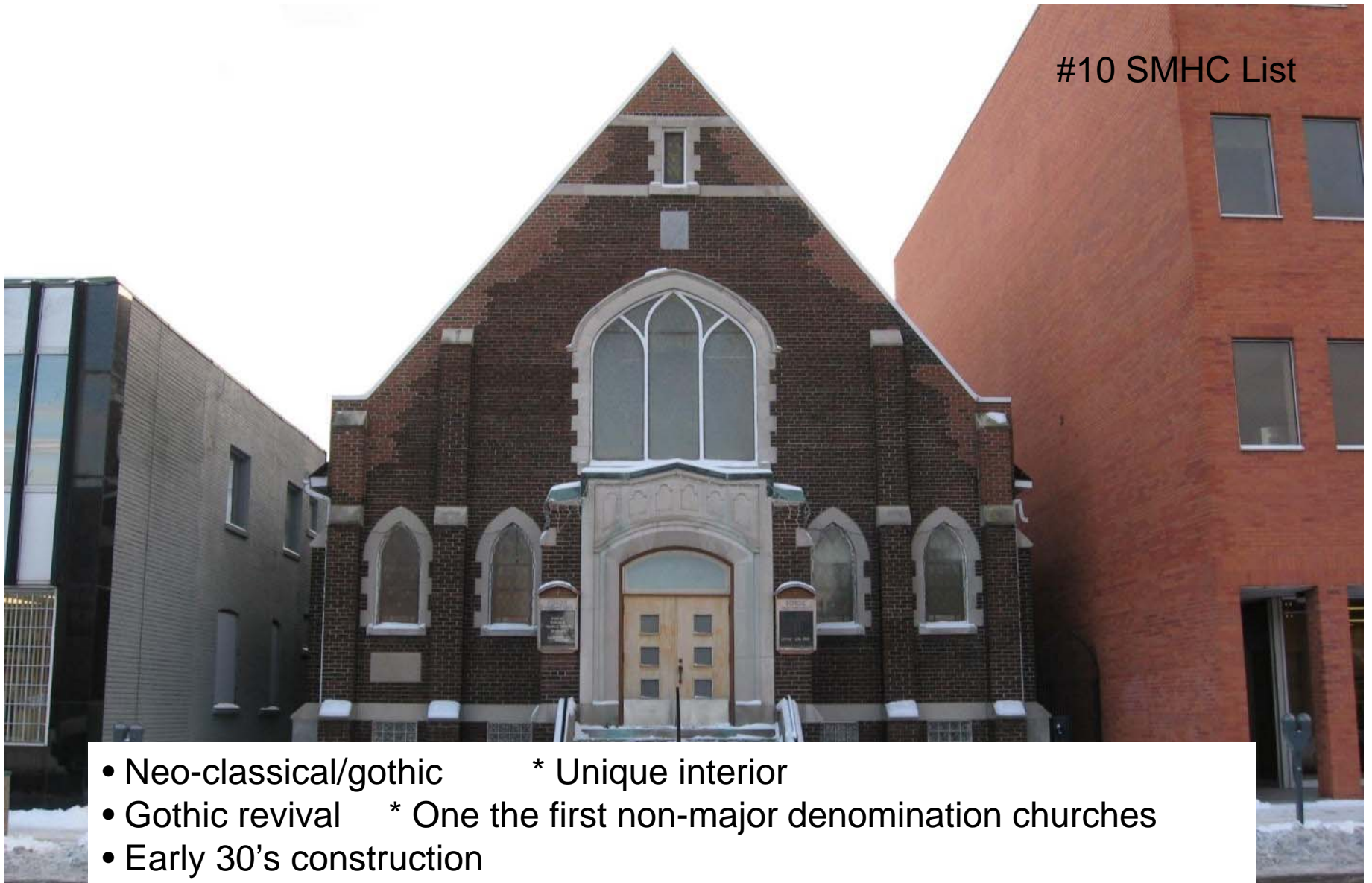


- Original site of North-American Hotel destroyed by fire about 1937
- Coulson Hotel replaced it on the same site shortly thereafter.
- Art Deco

Knox Presbyterian Church

75 Larch Street

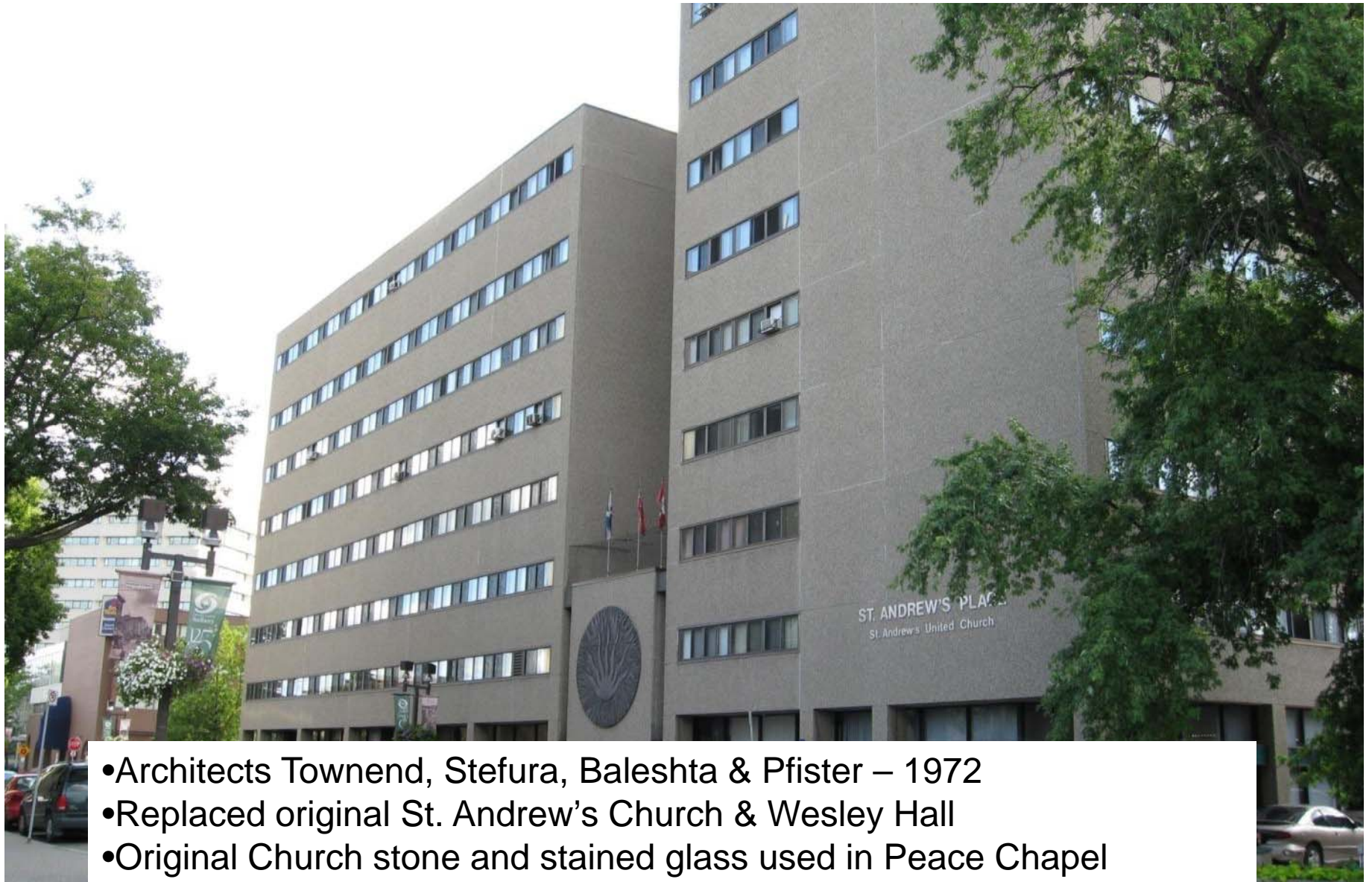
#10 SMHC List



- Neo-classical/gothic * Unique interior
- Gothic revival * One the first non-major denomination churches
- Early 30's construction

St. Andrew's Place

111 Larch Street #4 SMHC List



- Architects Townend, Stefura, Baleshta & Pfister – 1972
- Replaced original St. Andrew's Church & Wesley Hall
- Original Church stone and stained glass used in Peace Chapel

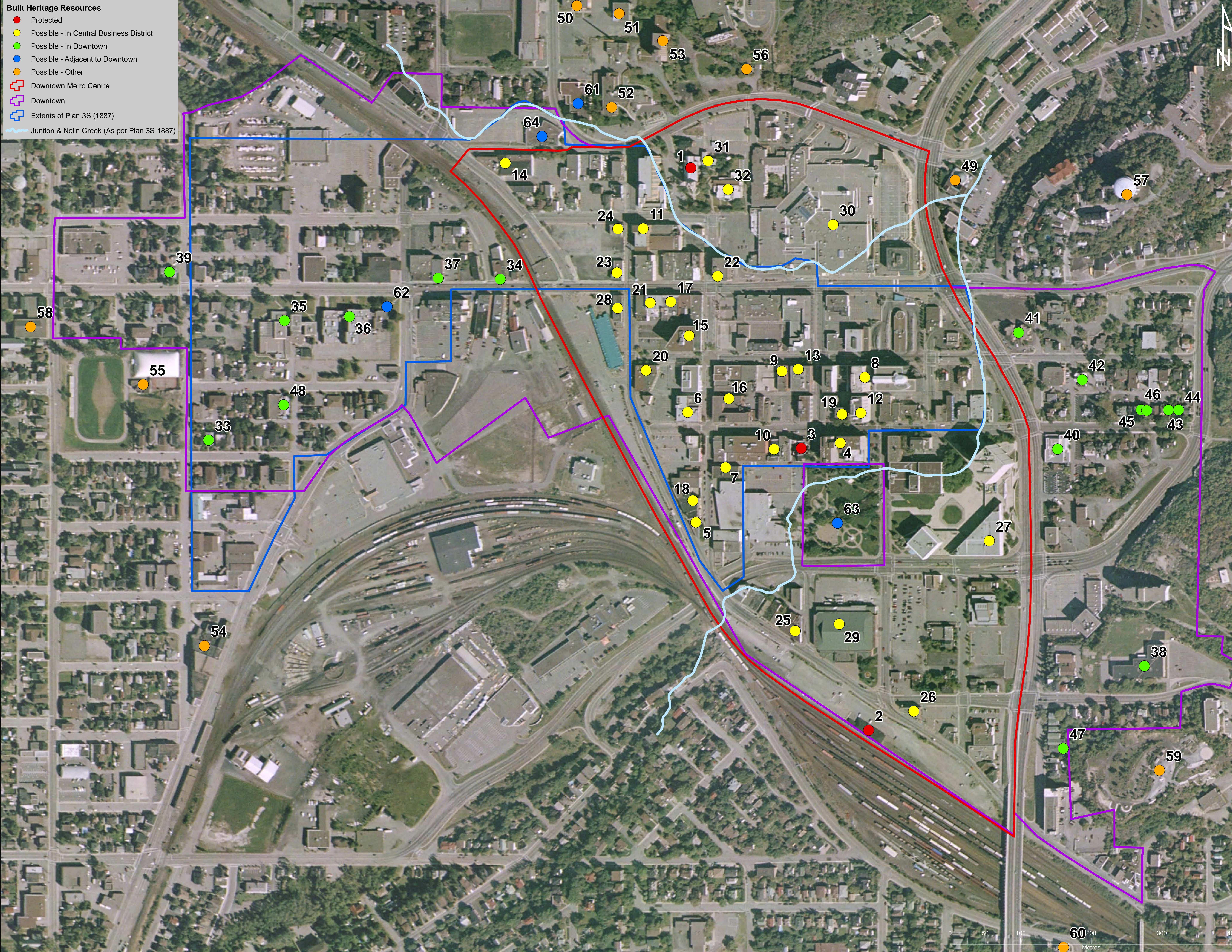
APPENDIX B

SMHC LIST OF HERITAGE PROPERTIES & LOCATION PLAN

Key Location	Address	Name
1	30 Beech Street	Christ The King Church and Rectory
2	233 Elgin Street	CP Rail Station
3	85 Larch Street	Church of The Epiphany
4	111 Larch Street	St. Andrew's Place
5	143 Durham Street	Moses Block (Bertolo's)
6	93 Durham Street	Stafford Block (SRO Night Club)
7	118 Durham Street	Northern Ontario Building (Reg Wilkinson's)
8	127 Cedar Street	Twin Towers
9	83 Cedar Street	Old City Hall
10	75 Larch Street	Knox Presbyterian Church
11	24 Elgin Street	Grand Theatre (Grand Night Club)
12	128 Larch Street	Twin Towers
13	93 Cedar Street	Bell Building (Canada Brokerlink Ontario Inc.)
14	62 Froot Road	Former INCO Club
15	57 Durham Street	Scotia Tower
16	86 Durham Street	Coulson Hotel
17	67 Elm Street	Silvermans Building
18	135 Durham Street	Roy's Furniture
19	120 Larch Street	Gougeon Insurance Building
20	7 Cedar Street	Rothschild Block (BIA)
21	73 Elm Street	Muirheads Building (Former Grand & Toy)
22	56 Elm Street	Maki Building (Records on Wheels)
23	80 Elm Street	Sterling Silver Bank (Fiorino's Men's Wear)
24	25 Elgin Street	Former DeMarco Building
25	206 Elgin Street	Prete Block (Towne House Tavern/Sportsbury)
26	300 Elgin Street	Former Ledo Hotel
27	200 Brady Street	Tom Davies Square
28	49 Elgin Street	CNCP Telecommunications Building and Market Square
29	240 Elgin Street	Sudbury Community Arena
30	40 Elm Street	Rainbow Centre Mall
31	14 Beech Street	Paroisse Ste-Anne des Pins
32	14 Beech Street	Paroisse Ste-Anne des Pins
33	232 Oak Street	Lansdowne Residence
34	110 Elm Street	N'Swakamok Native Friendship Centre

35	181 Elm Street	Sudbury District Courthouse and Jail
36	155 Elm Street	Sudbury District Courthouse and Jail
37	128 Elm Street	Former Vapaus Finnish Publishing House
38	300 Van Horne Street	Ecole Publique de Jeanne Sauver
39	250 Elm Street	Parker House
40	233 Larch Street	Jackson & Bernard Building (J.A. Laberge Res)
41	210 Cedar Street	Randolf Centre
42	249 Cedar Street	Fournier Residence
43	296 Larch Street	Riddell Terrace
44	302 Larch Street	Riddell Terrace
45	282 Larch Street	Dickie Residence
46	284 Larch Street	Dickie Residence
47	Drinkwater Street	Drinkwater Street Homes
48	189 Applegrove Street	Jubilee Heritage Daycare
49	40 Notre Dame Avenue	St. Mary's Ukrainian Catholic Church
50	164 MacKenzie Street	Separate Schools (St. Louis de Gonzaque)
51	164 MacKenzie Street	Separate Schools (St. Aloysius)
52	20 Ste Anne Road	Former St. Joseph Hospital (Red Oak Villa)
53	30 Ste Anne Road	RC Episcopal Corporation Building
54	185 Lorne Street	Former Northern Breweries Facility
55	30 Cypress Street	Queens Athletic Field
56	64 Xavier Street	Native People of Sudbury Development Corporation
57	87 Pearl Street	Pearl Street Elevated Water Tank
58	19 Regent Street	Navy League of Canada
59	Van Horne Street	The Grotto
60	363 Ramsey Road	Skene Residence
61	74 MacKenzie Street	Main Library
62	Elm Street	Cenotaph @ Courthouse
63	Minto Street	Memorial Park
64	33 MacKenzie Street	Sudbury Star

- Built Heritage Resources**
- Protected
 - Possible - In Central Business District
 - Possible - In Downtown
 - Possible - Adjacent to Downtown
 - Possible - Other
 - + Downtown Metro Centre
 - + Downtown
 - + Extents of Plan 3S (1887)
 - + Junction & Nolin Creek (As per Plan 3S-1887)



A photograph of a modern multi-story building facade. The lower portion is made of reddish-brown brick, while the upper portion features light blue vertical metal panels. Large windows are visible on all levels. The name 'CLARIDGE CENTRE' is mounted on the brick section in white, bold, sans-serif capital letters. A tree with some autumn-colored leaves is visible on the left side of the frame.

**CLARIDGE
CENTRE**



section 2

Strategy Reports



Downtown Sudbury Retail Strategy

DRAFT

June 2011



Downtown Sudbury Retail Strategy

Contents

1.0 INTRODUCTION	1
2.0 FUTURE RETAIL POSITIONING	2
3.0 RETAIL DEMAND POTENTIAL- ATTAINING A STRONGER RETAIL OFFER	5
3.1 Overall Discussion	5
3.2 Retail Potential Calculations	10
3.3 Summary	13
4.0 FUTURE RETAILER OPPORTUNITIES	14
4.1 Hospitality	14
4.2 Neighbourhood Retail Goods and Services	15
4.3 Specialty Niche Retailer Strategy	16
4.4 Retailer Locations	20
5.0 HOW TO MARKET AND GROW THE DOWNTOWN RETAIL OFFER	21
6.0 CREATING A DIVERSE DOWNTOWN RETAIL EXPERIENCE	29
6.1 Hospitality	29
6.2 Neighbourhood Retail Goods and Services	34
6.3 Specialty Niche Retailer Strategy	36

1.0 Introduction

The City of Greater Sudbury (the City) and Greater Sudbury Development Corporation (the GSDC), in partnership with many community associations and organizations, are preparing a new Vision, Plan, and Action Strategy for Downtown Sudbury. Urban Marketing Collaborative/J.C. Williams Group (UMC) is part of a team led by Urban Strategies Inc, who has been retained to assist the City and GSDC with this assignment.

In recent years, a considerable amount of work has been done to better understand and characterize existing commercial conditions and opportunities in Downtown Sudbury. The Downtown Village Development Corporation (the DVDC), with the support of the federal and provincial governments, as well as the Downtown Sudbury Business Improvement Area (the BIA), has completed a Business Retention and Expansion Survey (2007).

More recently, the DVDC and BIA partnered with the Ontario Ministry of Agriculture, Food and Rural Affairs to complete a Business Mix Analysis (2010) and a Trade Area Report (2010), both for Downtown Sudbury. The Business Mix Analysis identifies the structure, function, and potential business opportunities in Downtown Sudbury. The Trade Area Report provides information on local consumer demand and demographic characteristics, which is important to learn the characteristics and buying habits of consumers in the trade area; determine the most important consumer groups to target; and enable assessment of the types of business, merchandise sold, and services offered.

Building on this understanding, the retail component of the master plan exercise, identifies future best-fit opportunities that are suited to Downtown Sudbury. More specifically, the retail component will identify the “how much,” “who,” “where,” and “how” of downtown retail, including:

- The most likely amount of new retail space that can be supported Downtown;
- The most appropriate types of retail to fill existing gaps;
- The most appropriate location for new retail, commercial, and residential uses;
- How the downtown can best support and retain its existing retail base;
- How the downtown can best attract new retail uses; and
- How the downtown can differentiate itself from other retail centres.

This action plan report builds off of the UMC Position Paper that documents the existing conditions for Downtown Sudbury in terms of demand and supply.

2.0 Future Retail Positioning

As stated in the Positioning Paper, the other two major retail centres in the City of Greater Sudbury are the south end near Paris/Regent and New Sudbury. Major retailers at each location include the following:

- South End – Wal Mart, Canadian Tire, Southridge Mall, Regent Street larger formats
- New Sudbury – New Sudbury Centre (Sears, Wal Mart, Future Shop, SportChek, Aeropostale, Laura, American Eagle, HMV, Coles) and Rio Can (Chapters, Staples, Sears Whole Home, Home Sense, Old Navy, PetsMart, Winners, Michaels, Silver City)

Due to the City of Greater Sudbury's size, the population can typically support only one of each major retailer's banner (e.g., one Chapters store, one Winners).

In the future, Downtown Sudbury cannot position itself as a competitor with the south end or New Sudbury shopping destinations. These retail centres have a firm grasp on traditional, middle market consumer and will be the location of choice for most major national and international retailers. Downtown Sudbury retail has to be more specialized, niche market driven, and generally represent a higher quality offering.

Retail Vision

The retail vision for Downtown Sudbury includes three pillars:

1. A focus on hospitality as a central overarching theme
 2. Neighbourhood convenience goods and services;
 3. Specialized shopping destination for food services, apparel, home furnishings, and specialty food
1. **Hospitality** – Hospitality-type retail and other supporting businesses includes a broad range of goods and services including retail, experiential retail, entertainment, arts, culture, recreation, special events, and accommodation that are focused on providing a great experience to the visitor in Downtown Sudbury. Amazing personal service at restaurants, Market Square, unique specialty food stores, food related special events such as Savour Sudbury and Rib Fest, improved overnight accommodation amenities, engaging hockey games at the Sudbury Arena, and then the potential spin off to other retailers is part of the overarching theme that focuses resources on hospitality-related initiatives in Downtown Sudbury. The focus is not so much on the quantity of the hospitality-related retail businesses but the quality. There are many excellent businesses, and improving their operations, their sales productivity levels, and their customer appeal are of primary importance. It also positions Downtown Sudbury away from price, selection, and efficient shopping that the other shopping areas dominate.

Hospitality Focused Ideas



2. **Neighbourhood** – As the residential population increases in the Greater Downtown, there will be continued interest to provide goods and services to meet the local resident's daily and weekly needs.

Downtown Sudbury should begin to market and develop itself as a residential neighbourhood with quality goods and services for these consumers. While many of these businesses exist, the full range of goods and services includes quality grocery, urban grocers, specialty food stores, urban pharmacies, alcohol stores, and beauty and health supply stores as well as services such as dry cleaners, banks, travel agents, beauty and barber services, cafés, and bistros.

Not only does Downtown Sudbury serve their shopping needs, it becomes the place where local residents like to hang out and meet their neighbours, thereby furthering demand for more residential.

3. **Specialized Retail Niches** – Unique specialty items that cannot be found elsewhere is the basis for the niche specialization. The depth and breadth of retailers attained in certain categories are a real strength for Downtown Sudbury. This includes food service operations, women's and men's clothing as well as home furniture/furnishings. Others that can be enhanced include specialty food and art related type stores.

3.0 Retail Demand Potential- Attaining a Stronger Retail Offer

Increasing retail sales and further retail demand through lowered vacancy and new retail development is the primary goal.

As indicated, there the emphasis is primarily on improved quality of the retail operations including higher sales productivity for the retailers.

3.1 Overall Discussion

There are three ways to increase retail sales:

1. Increased visitation - through a combination of either the same people visiting more often or people that do not visit becoming visitors. Experience has shown that it is easier to encourage visitors to visit more often than attempting to convert non-visitors to become visitors
2. Higher conversion - when a customer visits Downtown the goal is to increase the amount they spend in each trip. Longer stays often benefit in higher sales, having adjacent similar retailers encourages customers to shop more, among other tactics.
3. Higher prices - higher sales are the result of higher prices. However, retailers are often able to attain higher prices through increased services (e.g., home delivery, better personal service, follow up phone calls with loyal shoppers, and overall being very solution oriented).

The City, Greater Sudbury Development Corporation (GSDC), Downtown Sudbury BIA, and the DVDC from a planning perspective cannot control directly the prices that are charged, how a store is laid out for higher conversion rate, nor the ability for a retailer to get a passerby to walk into a specific store. They can help to foster increased visitation and the location of potential retailers to create ideal retailer adjacencies.

While there are many tactics, three focused initiatives should include:

1. **Increased residential.** There are better sales opportunities for retailers when there are more people with moderate to higher household incomes living in or near Downtown. Generally, people shop closer to home for most neighbourhood and convenience goods type shopping. However, there are thresholds that retailers generally adhere to when looking for expansion sites.

Examples include the following:

- One book store for 12,000 residents
- One jewellery store for 6,200 residents
- One menswear store for 6,000 residents
- One 20,000 sq. ft. grocery store for 5,000 residents
- One small to medium sized pharmacy for 8,000 residents
- One small home furnishings store for 4,000 residents
- One café/bistro for 1,500 residents

In addition, the general rule is approximately 2,000 employees to support a food service operator.

2. **More activity centres in Downtown** – Office space, hotel rooms, arenas, performing arts centres, libraries, museums, parks, YMCA, colleges/universities, etc. all provide activity generators that encourage visitors to come to Downtown, and each carries a potential for spin off retail sales. There is a higher spin-off associated with office workers, performing arts patrons, and sporting event attendees, especially for food service operations. The spinoff is less evident with activities such as local-oriented trade shows (home and garden show) or museums, as these trips are primarily event-driven and do not coincide with other shopping or recreational type activities. It is important to understand when these activities occur through the week or year, as this will be a key influencer on whether retailers can create a business plan whereby they make money throughout most of the year. This is why theatre districts become important to certain downtowns as these districts concentrate a consistent flow of patrons to the specific area, which can then support a range of food service options.

The recent announcement of the Laurentian Architecture Laurentienne school locating in Downtown Sudbury will be a significant activity centre for Downtown retail businesses by bringing over 400 students on a regular basis along with over 40 staff. Not only will it produce more demand for goods and services (e.g., quick service eatery on its own as well as affordable food service options) but when combined with other initiatives and the added marketing and good will received will lift overall retail sales activity. As well, a new hotel would provide additional demand for food service in Downtown Sudbury (note that demand for a new hotel has not been conducted in this study but the consultant believes there is a gap in the mid quality hotel market).

The following chart illustrates current visitors at select activity centres throughout Downtown Sudbury (note it is not complete and is solely an illustrative example of how to approach activity planning in Downtown Sudbury). For retailing purposes it is

broken into daytime visitation and night time visitation as different retailer categories are open at different times of the day.

Selection of Daytime and Nighttime Activity Generators in Downtown Sudbury

Daytime	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Office workers: 6,000 M-F	120,000	114,000	138,000	120,000	126,000	132,000	120,000	132,000	126,000	120,000	132,000	120,000
Number of days/month	20	19	23	20	21	22	20	22	21	20	22	20
Hotel Visitors: 475 rooms	177,137	177,137	177,137	205,432	205,432	205,432	205,432	205,432	205,432	176,843	177,137	177,137
Hotel Occupancy	60.1%	60.1%	60.1%	69.7%	69.7%	69.7%	69.7%	69.7%	69.7%	60.0%	60.1%	60.1%
Sudbury Theatre Daytime: 285 seats	257	770	513	770	0	0	0	0	0	513	513	1,539
Number of performances	1	3	2	3	0	0	0	0	0	2	2	6
Sudbury Wolves: Arena 3,500 attendance	0	3,500	0	0	0	0	0	0	0	0	0	3,500
Number of games		1										1
Market Square	0	0	0	0	6,000	12,000	32,000	32,000	20,000	20,000	0	0
Trade shows at arena			15,000		20,000							
	297,394	295,407	330,650	326,202	357,432	349,432	357,432	369,432	351,432	317,356	309,650	302,176
Nighttime												
Sudbury Wolves: Arena 3,500 attendance	21,000	17,500	7,000	0	0	0	0	0	7,000	24,500	21,000	14,000
Number of games	6	5	2	0	0	0	0	0	2	7	6	4
Sudbury Theatre Nighttime:285 seats	1,026	3,335	2,052	3,591	0	0	0	0	257	3,335	2,052	1,796
Number of performances	4	13	8	14	0	0	0	0	1	13	8	7
Concerts at Arena: 5,000 seats	10,000	0	5,000	10,000	10,000	10,000	10,000	5,000	0	5,000	5,000	5,000
Number of concerts	2	0	1	2	2	2	2	1	0	1	1	1
Total Nighttime	32,026	20,835	14,052	13,591	10,000	10,000	10,000	5,000	7,257	32,835	28,052	20,796

Excluding the residential population, there is a range of 297,394 to 369,432 people per month in Downtown Sudbury.

- 3. **Critical Mass (more is more)** – Higher retail sales conversion rates are achieved when similar retailers are clustered together. There are specific strengths in retailing in Downtown Sudbury, and adding more retailers can mean that it will have a greater draw throughout the region. This may include food services, apparel, specialty food stores, and home furnishings. The prevailing wisdom is that more retailers of the same genre but all with a slightly different approach/theme will do well to attract more visitors. An example is Ottawa Street in Hamilton that has emphasized textiles and home décor to their success.



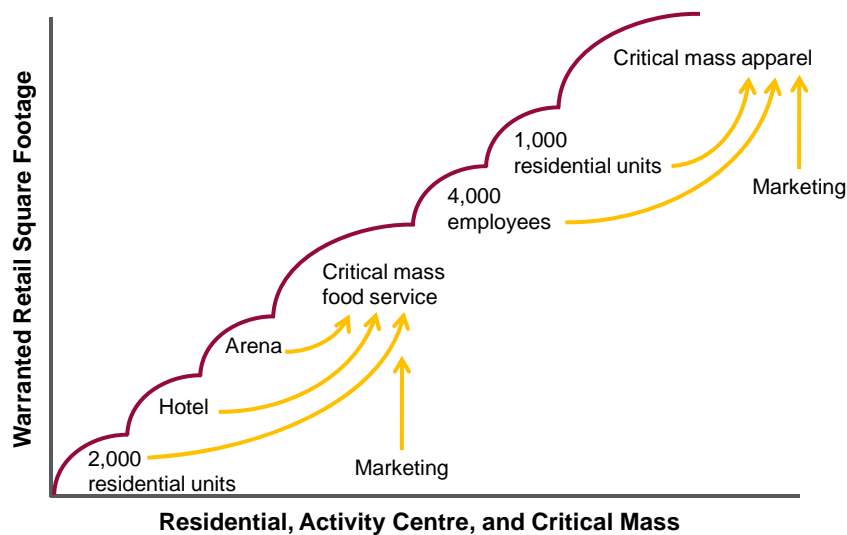
The Ottawa Street BIA realized the strength and wanted to recruit more home décor-type places including antiques. The success has pushed the recognition further and it is becoming a very experiential type street environment. Other places have had similar success such as Jackson Wyoming and arts; home furnishings and King Street East in Toronto; jewellery row in Downtown Miami, restaurant rows throughout North

America, among others. In addition, the International Council of Shopping Centres' Survey of Office Workers documented that office workers in Downtowns with ample retail offerings spend significantly higher amounts than Downtowns with limited retail emphasizing that the more retail there is, the more that consumers will actually spend.

As an illustration, Downtown Sudbury may add several hundred new employees in office buildings but existing retailers will likely absorb these potential retail expenditures. It is only when there are a further 2,000 workers that an additional food service operator would be warranted. Once there are three or four cafés serving office workers located in close proximity to one another, then they may have reached a tipping point where the businesses will draw deeper and further. (Existing office workers who ate there will spend more and office workers who never ate there in the past will become current shoppers, as there will be a greater choice of food service operators.)

The following illustration shows that when several smaller steps happen together the resulting critical mass can move demand ahead significantly when marketed successfully. Each initiative on its own whether it is a 2,000 additional housing units, or a new hotel adds to retail demand. However, when several projects coincide together the whole is greater than the sum of its parts for specific categories such as food services or apparel.

Retail Demand Critical Mass



Other important initiatives will include a strong emphasis on marketing Downtown Sudbury and increased visitation of the current visitors.

Criteria for Success

- Success in Downtown Sudbury will not just be measured by additional square footage. The initial years of revitalization will see an increase in the sales productivity (sales/sq. ft.) of existing retail businesses. There will be a shift as less productive larger spaces are no longer required and they are replaced with smaller-scale formats (e.g., a nightclub closes and a small bistro opens).
- Other measures will include average sales/sq. ft. and increasing retail rent levels. High rents signal to retailers that the sales volume potential is higher and therefore the profitability is higher, justifying a retail location. Retailers should spend approximately 15% of their sales on occupancy type costs (at over 25% there is a concern the retailer is not producing the sales to justify the rents).
- A shift in the retail mix that favours desired hospitality based retailers as well as specialty niche retailers such as apparel, home furnishings, specialty food stores, and small-scale food services. As well, retention of neighbourhood convenience retail including food and beverage (urban grocery, pharmacy, alcohol, specialty food stores) is required.

3.2 Retail Potential Calculations

Three retail potential scenarios have been developed:

1. 2010 Current Estimates
2. Future Date Target Market Increase – increased population of the target markets but capture rates are kept the same. This future scenario is not based on any particular set of developments but modest increases. J.C. Williams Group has prepared this as a template so that other future scenarios can also be tested to ascertain their impact on retail sales and total square footage.
3. Future Date Target Market and Capture Rate Increase – same assumption as in Scenario 2 but increased capture rates through the development of critical mass

The retail categories include retail merchandise (e.g., apparel, home furnishings, electronics, and leisure retail), convenience goods (e.g., grocery, convenience stores, specialty food, wine and liquor stores, and health care stores), and eating and drinking (cafe, coffee shop, lunch, fast food, full-service restaurant, and bar). Personal services have not been included in the analysis due to the difficulty in assessing average sales potential and average sales per square foot (e.g., travel agents, banks, and personal care services).

Target Markets

	Current Estimates	Target Market Increase for Scenarios 2 and 3
Greater Downtown	10,658	12,700
City of Greater Sudbury	155,957	164,780
Additional Inflow	50,000	50,000
Downtown Workers	6,000	10,000
Downtown Hotel Guests	150,000	200,000
Other Hotel Guests	250,000	250,000
Downtown Performing Arts	86,715	100,000
Downtown Sporting Event Attendees	105,000	150,000
Other Performing Arts	350,000	350,000
Other Museum/ Art Gallery	200,000	250,000
Downtown Special Events	200,000	250,000

Sources: Statistics Canada, MapInfo, City of Greater Sudbury, Tourism Sudbury, Statistics Canada from City of Greater Sudbury Performing Arts Centre Development Plan July 2008 by Novita, CS&A, and IBI Group, Trends and Canadian Hotel Industry, PKF Consulting, Science North, Destination Earth, Art Gallery of Sudbury 2010

Note – the options are one scenario related to growth in the above listed target markets and no time frame given

Assessment

Based on Scenario 2 for increased target market sizes only, the demand for retail merchandise, food services, and convenience retail increased by approximately 23,350 sq. ft over the current estimates.

For Scenario 3 that includes Scenario 2 but allows for greater capture rates due to improved critical mass, the retail demand for these three categories increases to 37,358 sq. ft. (14,000 sq. ft. greater than in Scenario 2).

Current Estimate Calculations

As background information, the current estimate retail demand was calculated using the following assumptions.

- Annual visitation/attendance levels or the population levels; and
- Retail expenditure for retail merchandise, convenience goods, and eating and drinking. These represent the average sales associated with each visitor regardless of whether they are a purchaser or not.
- Total Potential is the visitation level multiplied by the retail expenditure. This represents the total dollar value of sales that are available to be captured by Downtown Sudbury.
- Capture rates are estimated based partially on the Downtown Sudbury survey and UMC's experience with other downtowns and shopping districts.
- Downtown Sudbury expenditure is the result of the total potential multiplied by the capture rates.
- Because there is cross-over in expenditure between the target market groups, an adjustment has been made to lower expenditure by one-third.
- Average sales per square foot based on industry standards are used to determine the square footage that is possible. This is achieved by total adjusted sales divided by sales per square foot.
- The option is only one scenario based on redevelopment and development options. This is solely used to illustrate the impact on retail square footage demand based on this scenario. The option does not suppose any changes in the marketing that may also increase capture rates.

Current Retail Demand Summary

The following chart represents the current retail situation in Downtown Sudbury.

2010 Downtown Sudbury Retail Expenditure												
	Downtown Residents	Greater Sudbury	Additional Inflow	Downtown Workers	Downtown Hotel Guests	Other Hotel Guests	Performing Arts	Sudbury Arena - Sporting Events	Other Performing Arts in Sudbury	Other Museum and Art Gallery	Special Events Attendees	Total
Retail Potential												
Population	10,658	155,957	50,000	6,000	150,000	250,000	86,715	105,000	350,000	200,000	200,000	
Expenditure												
Retail Merchandise	\$1,815	\$1,879	\$1,879	\$870	\$30	\$30	\$1	\$1	\$1	\$2	\$2	
Convenience Goods	\$3,052	\$3,160	\$3,160	\$170	\$5	\$5	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$408	\$423	\$423	\$1,400	\$50	\$50	\$13	\$9	\$13	\$6	\$6	
Total	\$5,275	\$5,462	\$5,462	\$2,440	\$85	\$85	\$14	\$10	\$14	\$8	\$8	
Total Expenditure Potential												
Retail Merchandise	\$19,344,270	\$293,043,203	\$93,950,000	\$5,220,000	\$4,500,000	\$7,500,000	\$86,715	\$105,000	\$350,000	\$400,000	\$400,000	
Convenience Goods	\$32,528,216	\$492,824,120	\$158,000,000	\$1,020,000	\$750,000	\$1,250,000	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$4,348,464	\$65,969,811	\$21,150,000	\$8,400,000	\$7,500,000	\$12,500,000	\$1,090,875	\$934,500	\$4,403,000	\$1,164,000	\$1,164,000	
Total	\$56,220,950	\$851,837,134	\$273,100,000	\$14,640,000	\$12,750,000	\$21,250,000	\$1,177,590	\$1,039,500	\$4,753,000	\$1,564,000	\$1,564,000	
Downtown Capture Rates												
Retail Merchandise	30%	13%	3%	25%	50%	25%	75%	75%	0%	0%	80%	
Convenience Goods	65%	2%	2%	75%	75%	10%	75%	50%	0%	0%	50%	
Eating and Drinking	65%	40%	10%	80%	75%	50%	85%	85%	25%	10%	85%	
Downtown Expenditure												
Retail Merchandise	\$5,803,281	\$38,095,616	\$2,818,500	\$1,305,000	\$2,250,000	\$1,875,000	\$65,036	\$78,750	\$0	\$0	\$320,000	
Convenience Goods	\$21,143,340	\$9,856,482	\$3,160,000	\$765,000	\$562,500	\$125,000	\$0	\$0	\$0	\$0	\$0	
Eating and Drinking	\$2,826,502	\$26,387,924	\$2,115,000	\$6,720,000	\$5,625,000	\$6,250,000	\$927,243	\$794,325	\$1,100,750	\$116,400	\$989,400	
Total	\$29,773,123	\$74,340,023	\$8,093,500	\$8,790,000	\$8,437,500	\$8,250,000	\$992,280	\$873,075	\$1,100,750	\$116,400	\$1,309,400	\$142,076,051
Supportable Square Footage												
Retail Merchandise (\$300/sq. ft.)	19,344	126,985	9,395	4,350	7,500	6,250	217	263	0	0	1,067	131,528
Convenience Goods (\$600/sq. ft.)	35,239	16,427	5,267	1,275	938	208	0	0	0	0	0	44,515
Eating and Drinking (\$500/sq. ft.)	5,653	52,776	4,230	13,440	11,250	12,500	1,854	1,589	2,202	233	1,979	80,779
												256,822

3.3 *Summary*

The result of the analysis illustrates that new initiative such as residential, arena, office developments by themselves will not significantly affect demand for new retail space. However, it does illustrate that there will be improved retailer productivity and that through retail planning and attaining good retailer adjacencies on specific retail streets in Downtown Sudbury there can be benefits from attaining higher critical mass. Focusing on projects that increase critical mass and thereby the capture rates for the specialized retail categories (and in similar locations in Downtown) would add further to the overall demand for retail space.

4.0 Future Retailer Opportunities

Overall, there is demand in Downtown Sudbury for opportunities related to food services, home furnishings, sporting goods, leisure retail, apparel, local goods and services. The opportunities have been categorized as per the three pillars in the retail vision however, it is noted that these are not mutually exclusive.

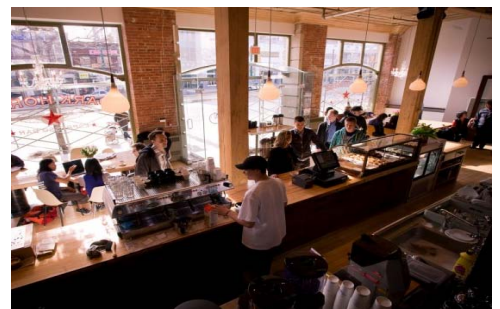
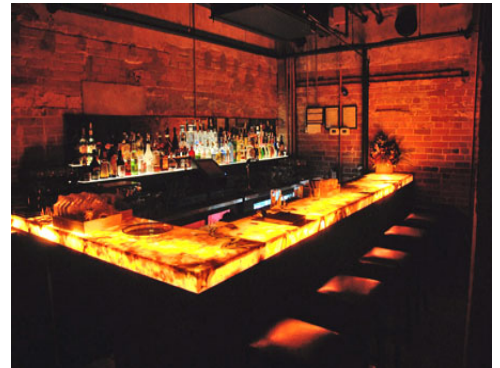
1. A focus on hospitality as a central overarching theme;
2. Neighbourhood convenience goods and services;
3. Specialized retail niche.

4.1 Hospitality

The focus of a hospitality pillar will be primarily on food service type businesses.

Food Services

- There are many examples of good quality food service operators in Downtown Sudbury. These range from cafes, bistros, restaurants, and nightclubs. In addition, the range of options includes traditional to ethnic, franco-ontario, white table cloth, to eclectic. It is anticipated that there is not a significant degree of new space warranted overall in Downtown Sudbury but rather a continual shift towards higher quality and high sales productivity within the same amount of total square footage.
- The emphasis should always remain on good quality independent food service operators. National retailers may include coffee shops and quick service eateries.
 - Starbucks – Should recruit Starbucks for Downtown
 - Other coffee shops – Second Cup, Timothy’s, Coffee Culture should be developed
 - Retain local coffee shop/roaster – Old Rock Coffee
 - Quick service – Better quality quick service eateries located in Rainbow Centre and on high visibility streets should be encouraged including both local, regional, and national operators.
 - Toppers
 - Deluxe
 - Fit for Life
 - Freshii
 - Chipotle
 - Hero Burger
 - Five Guys Burger



Specialty Sports Oriented Food Service

Combining sports and food may provide a unique appeal in Downtown Sudbury for some of the larger spaces. Current trends in urban and bistro bowling alleys and as well as ping pong appeal to the young adult population that is not necessarily nightclub oriented. It matches well with the Sudbury Arena and recreational aspects of Downtown Sudbury.

While the obvious hospitality focused retailer opportunities are centred on food service operations, as stated, the majority of the retail operations should be focused on providing exceptional service and linkages/partnerships with the activity centres in Downtown or elsewhere (e.g., arena hockey games, performing arts, office workers, tourism, etc.)

4.2 Neighbourhood Retail Goods and Services

Food and Beverage

- Downtown Sudbury is well served by local food and beverage stores. Doyle's Marketplace, La Fromagerie Elgin, LCBO, Eat Local Sudbury, Frank's Delicatessen, Golden Grains, and Northern Flavours provide goods for both local and regional residents. In addition, the Downtown Sudbury Market Square is active throughout the growing season on Saturdays and Sundays providing fresh produce, meat, seafood, and other food (and craft) items.
- The buy local movement and the renewed emphasis on quality foods has shifted buying patterns in favour of specialty food type stores.
- Downtown Sudbury should work to ensure they retain the LCBO as well as the small urban grocery store. Doyle's Marketplace illustrates a good example of how to make an urban grocer financially viable. The high margin café is located at the front of the store and carries the bulk of the sales activity and the low margin food is located more towards the back. Other food stores do similar merchandising plans by locating high margin prepared foods, quick meals, and home meal replacement at the front with high exposure and other products at the back of the store.
- Specialty food stores that are highly specialized and when there is critical mass of them together begin to act as an anchor themselves and draw people. Shoppers can visit the many



different shops that have become experts in their field. These stores should be authentic to the local Sudbury experience including Franco-Ontario culture, locally available foods, and other ethnicities such as Italian and Ukranian.

- Other specialty food shops include:
 - Bakery, cake store
 - Meat (and seafood) store, butcher
 - Ice cream, desserts, gelato
 - Prepared foods such as perogies, lasagna, cabbage rolls
- Location – The specialty food stores should be located in relatively close proximity to provide for ease of shopping.

Health Care and Pharmacy

- In Downtown Sudbury, there is success in the recent opening of the Shoppers Drug Mart. At present there are two large national pharmacies. The focus should be on retention of these retailers. There is an opportunity for smaller, more specialized health care stores related to beauty. This may include a Bath and Body Works type store that would cater to the office worker population and the regional visitor. It is noted that Jan Browning Boutique carries beauty related products.

Services

A full range of personal and medical type services are available in Downtown. There should be emphasis on maintaining and enhancing the quality personal and medical-related services available. Consumption patterns indicate a growth in services that are replacing traditional retail or retailers that combine both goods and services (e.g., bicycle store and service shop, electronics store that is also sells service related to installation, grocery stores that include home meal replacement options and/or catering, etc.)

- Medical
- Dental
- Veterinary
- Spa services
- Beauty – barbershop, beauty salon, nails, brows, etc.
- Other personal services such dry cleaning, travel, shoe repair, etc.

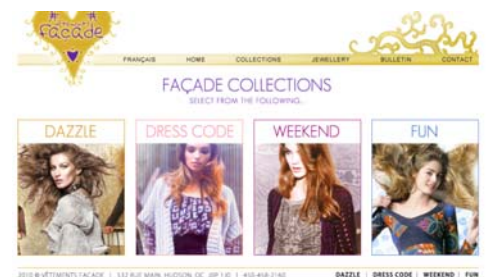
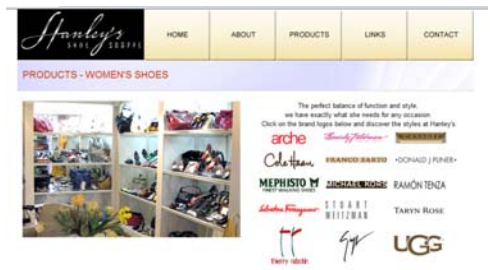
4.3 Specialty Retailer Niches

Apparel and Accessories

- Men’s and women’s mid-to-high end clothing is a strength whereby there is critical mass to build off of. The majority of these stores will be from 1,000 to 3,000 sq. ft. in size but there may be opportunities for larger format apparel stores.
- Apparel and accessories retailers will be primarily focused on independent retailers that carry a narrow line of goods but deep product lines – narrow and deep retailers. For

example, a shoe store that carries a limited number of brands but an extensive array within that brand such as:

- Ron White – focuses on a limited number of brands such as Stuart Weitzman, Thierry Rabotin, Donald Pliner, Cole Haan, Frye, and their own custom made shoes
- Hanley’s Shoes – Aquatalia, Arche, Beverly Feldman, Casadei, Cole Haan, Donald J Pliner, DVF, Guisepppe Zanotti, La Canadienne, Mephisto, Michael Kors, Stuart Weitzman, Thierry Rabotin, and UGGS
- Becker Shoes – Stores located in downtowns throughout North/Central Ontario including Orillia, Barrie, Huntsville, etc.
- Walking on a Cloud.
- There may be some national chains located in Sudbury or considering Sudbury who would opt for a non-mall or non-power centre location. These include Walking on a Cloud, Mark’s Work Warehouse, Roots, and Urban Outfitters (at present there are few Urban Outfitters in Ontario and would tend to locate in Southern Ontario first before a Sudbury location).
- A focus for clothing and outerwear should be on quality apparel pieces built for northern climates. There is a very good selection of high end business attire in Downtown Sudbury.
- Additional sales potential will come from outside the local area, as regional visitors/tourists will visit either the critical mass of clothing-type retailers or for the destination appeal. Retailers should market as solution oriented rather than just saying there are tops, pants, and skirts, etc.
- Apart from the optical store located in Rainbow City Centre, another optical store tied to an optometrist would do well in Downtown Sudbury.



Furniture and Home Furnishings

- Furniture and home furnishings is a strength in Downtown Sudbury. Further development of home furnishings should be encouraged. This includes traditional, contemporary, and mid-to-higher end home furniture and furnishings. In addition, kitchen supply-type stores would do well.
- With population size and the modest population growth in the City of Greater Sudbury along with competition from large format stores, this will be a difficult category to pursue. However, a focus on urban products that are not available will resonate with the young professionals living in the area.

- Franchise stores such as Saturday Afternoons would do well in Downtown Sudbury along with contemporary stores such as Details in Alliston, Keeping Room in Dundas, and custom-made local furniture such as Artisan Interiors in Stratford if marketed successfully.

Sporting Goods

- City Sports in Downtown Sudbury is a great store geared to the recreationalist. Other similar product stores should be able to do well catering to different brands and product lines. The issue will be once these stores become successful they tend to relocate to larger premises with their own parking, often outside of Downtowns.
- A collection of specialized sporting goods and sporting wear stores could become a strong destination rather than a large generalist sporting goods store. Sporting goods could become another specialty niche including athletic footwear, bicycles, skateboarding, skating, skiing, hiking/camping, canoeing, etc.
- Running stores such as Runners' Choice are able to draw extensive customers due to their specialization niche strategy and running clinics.

Leisure

- Leisure retail includes those stores that people shop at to enhance their leisure time. This may include sporting goods stores, hobby stores, music stores, musical instrument stores, book stores, computer stores, photography stores, art galleries, etc.
- Hobby – Knitting store, specialized yarns and needles, collectibles.
- Pet store – Pet supplies, bird feeders, northern Ontario focused.
- Music store – Used CD store should be improved but no opportunity for new CD store.
- Bookstore – The Librairie Grand Ciel Bleu exists in Downtown Sudbury predominantly providing French reading materials. It is difficult to recommend more books stores given the growth of online book purchases. A bookstore would have to include other features such as textbooks as in Downtown Orillia, a café as in Downtown Guelph.
 - The Bookshelf in Downtown Guelph offers a book store, café, bistro, patio seating, and a small cinema. The used bookstore Books and Company in Downtown Picton has a café attached.





A specialized cycle shop would blend well with the vision of Downtown Sudbury. The business plan of selling bicycles and then providing the annual servicing requirements ensures a profitable business model.



Sporting good stores beyond cycle stores should be considered. This includes independents as well as retailers such as The Running Room and Runners' Choice. A great power wall featuring the products is an excellent way to show specialization.

Other

Electronics

- Apple authorized dealer computer store.

Garden Equipment and Building Supplies

- The large format stores have taken the bulk of this business from those few traditional Downtowns. There are a few Home Hardware and True Value main street locations in Canada. There is neither a large demand nor the space to justify a large building supply or garden type store.
- Specialized smaller garden stores fit in with an urban environment as well as urban areas with condos. However, the turnover of these stores tends to be higher than average as it is often difficult to make them profitable. Often they are combined with a florist. Dahlia's in Kleinburg provides a unique lifestyle store that includes flowers, apparel, and home furnishings in a very contemporary setting.

4.4 *Retailer Locations*

Within Downtown Sudbury, there are several streets (centres) with varying strengths related to retail potential. Positioning includes the following:

- Rainbow Centre – junior fashion, discount, food court, office serving
- Elm Street – larger format stores, banks, convenience, larger restaurants, home furnishings, electronics, larger eclectic stores such as an Urban Outfitters type store
- Elgin (south end) – arts district, small independent stores, difficulty due to one-side retail (however, consumers view it as an extension of Durham Street’s retail offering)
- Durham – eclectic village, men’s and women’s clothing and accessories, home furnishings, specialty food, leisure retail, food services, patio restaurants
- Cedar (west) extension of Durham – men’s and women’s clothing and accessories, food services – mix of office serving and regional visitation
- Cedar (east) – transit and worker oriented retail and services – offers good vehicle accessibility from Paris Street
- Larch – personal services, cafes, office serving goods and services, beauty related goods and services, medical centre
- Shaughnessy and Minto – destination entertainment and food services
- Paris – highway commercial retail (vehicular dependent). Any development on the east side of Paris must have reinforced connections with Downtown

5.0 How to Market and Grow the Downtown Retail Offer

The following represent action items related to recruitment and retention strategies for Downtown Sudbury.

Recruitment Protocols

A well thought-out retail recruitment strategy is a worthwhile task for Downtown Sudbury led by City-GSDC/Downtown Sudbury BIA/DVDC. The number of projects that have begun to align in the Greater Downtown area will create a dynamic place for retailers. These include residential projects, college/university schools/departments (specifically the Laurentian Architecture Laurentienne school), Art Gallery of Sudbury, as well as other arts, recreation, and cultural developments. By building retailer pressure to locate in Downtown Sudbury, better retailers will succeed, property owners and developers can improve or build more space to fill demand, and retail critical mass and momentum will grow.

The City/GSDC/BIA/DVDC have taken an initiative role in the residential and retail recruitment initiative. They have completed several studies, some of which were in conjunction with OMAFRA to document the demand and the resulting retail opportunities. The first step is to establish firm communication and logistical protocols between the property owners/developers, the City- GSDC, the BIA, and the DVDC.

There are a multitude of different sources and ways to prospect for potential retailers. As stated, there must be a shared vision among the City-GSDC, Downtown Sudbury BIA, the DVDC, and the private sector to ensure success. The majority of these stakeholders must be on the same page for leasing and development initiatives. A program should include a property owner/brokerage council (e.g., Recruitment Council) to share vision ideas and discuss how to ameliorate any possible issues that arise.

An intense coordinated retail leasing program that has been tried in some downtowns (e.g., Washington, DC) is very difficult. This requires active recruitment by property owners to a select list of retailers and coordinating which property owners will go after which retailers. Rather, a cooperative approach is better. Everyone recognizes that a property owner is faced with limited options for leasing and that they may not be able to hold out for the ideal tenant. If there is consensus among the participating property owners, then that is better than outright mandated coordination.

The Recruitment Council may prove to be a good committee to initiate this work. It includes the City-GSDC/BIA/DVDC to help determine a joint marketing sales pitch and to keep all parties informed on changes (e.g., vacancy, leasing activity, rental rates). This needs to be in accordance with the province's privacy policy and the municipality's ability to release information about subject properties. This was successfully done in Downtown Ithaca and Duncity Providence.

An internal monthly/quarterly leasing report for the committee could be developed, illustrating who has been contacted, what was discussed including location, rent, and inducements, and required follow up. This would be a normal protocol in the shopping centre industry with brokers and retail centre management.

It is important to share information and be open but it is also important not to publicize potential deals too early. This could jeopardize the process. In addition, if the deal does not materialize, it will appear worse than if no deal were announced.

The coordination of prospective retailers with suitable vacant properties is essential, as is the distribution of correct information at appropriate times in the negotiation process. Neither the City-GSDC/BIA/DVDC will be responsible for “signing up the retailer.” They will be active in setting the stage, locating and attracting some prospects, and putting the property owners/developers in contact with the retailer. Then the property owner (and real estate brokers and lawyers) will frame the deal and sign it.

Recruitment Council

The City-GSDC/BIA/DVDC, should develop a Recruitment Council as part of the economic development process that is made up of interested stakeholders and local retail real estate professionals who already know how the local area works and what retailers are looking for (note this could be a DVDC or BIA board committee). Once the specifics of what a target retailer is looking for are identified, specific information targeted at their needs should be packaged for them. One basic package that has separate sheets is sufficient, thereby allowing more or less information to be provided. In addition, updates can be easily changed without having to reprint or adjust the entire brochure.

As part of the database of local businesses and properties, information should be collected beyond square footages and available parking so that there are fewer surprises when leasing negotiations begin in earnest (e.g., potential issues with venting, air conditioning, creek beds, roof conditions, etc.). This will put the recruitment effort in a better position to help address property deficiencies during the lease negotiation before it becomes too late. The potential retailer will want to know what has to be done to the property as part of tenant or landlord improvements. The actual leasehold improvements would be negotiated between the prospective tenant and the landlord (not the City-GSDC/BIA/DVDC).

In addition, the DVDC and the Downtown Sudbury BIA potentially in coordination with the City can hold seminars with brokers or property owners on Downtown opportunities, Downtown Sudbury realities of retail sales potential and rent expectations, and what retailers can afford.

Additional Policies, Rules, and Regulations

In addition, some municipalities have enacted policies and rules/regulations that encourage retail merchandise stores (e.g., no professional services allowed on ground floors on certain streets). This has been enacted in Downtown Calgary’s Stephen Avenue Mall to help preserve the retail character as well as in Downtown Burlington and Unionville. Other municipalities have required that any new retailer within certain categories must consider a downtown location first before being allowed to locate elsewhere (e.g., Owen Sound, Lincoln, NE). Further requirement polices have directed downtown developers to have the requirement that all new developments must have retail space on the ground floor (e.g., Portland, OR). Also, many municipalities use Community Improvement Plans as part of their retail recruitment programming. In this example, there may be incentives (e.g., façade improvement matching funds, low interest loans, density bonus, waiving development fees, etc.) that flow to developers/property owners if they recruit a business from the ideal tenant category lists (and are new businesses and not relocated businesses from elsewhere in the City). Some municipalities have used CIP programs to earmark funds specifically for the development of recruitment materials and staff resources to target specific businesses such as the City of Kingston recruiting Gap into the Downtown. Any use of these incentives and restrictions should be properly weighed as to their pros and cons before enacting them.

Government and Quasi Government Developments

Any municipally owned property should give consideration to how retail may potentially be used to activate the street. A review of any government property development with respect to the need for retail on the ground floor and, if so, what type of space it should look like, should be completed. This would include places such as a relocated library, Art Gallery of Sudbury, the arena, and the Laurentian Architecture Laurentienne school, among others (note this report is not advocating retail in all government and quasi government buildings but it should be reviewed as to the appropriateness and feasibility).

Retail Block Development Planning

Using the Downtown Master Plan, which will identify potential sites and redevelopment site, the City-GSDC/BIA/DVDC should develop a block-by-block list of potential sites and redevelopment sites. For each site, begin to develop ideas for specific retail categories and square footages that are ideal. This process will also reveal where there are deficiencies in retail size units; e.g., is there a lack of retail units of 5,000 sq. ft. that should be built? This will include the following tasks:

- Begin to place potential retailers and retailer ideas along the blocks in Downtown Sudbury;
- Identify soft sites that can be redeveloped;
- Determine the shortfall of space requirements and where the best locations for these retailers should be; and
- Do block planning by retail clusters as appropriate – food services, convenience retail, apparel, etc. to encourage appropriate adjacencies and pedestrian flows in the Downtown.

Create a Contact List of Preferred Uses

Begin to develop a list/database of retailers as a starting point that includes the business type, head office name, banners they carry, contact details, and leasing or agent information. Local, regional, and national tenants should be on this list. A hit list should be established using the Yellow Pages, industry directories, newspapers, and personal contacts. The City-GSDC/BIA/DVDC and the property owners may attend industry trade shows (e.g., arts and craft show, the giftware show, food show, food festivals in other communities, or antique shows) to find new stores. Other ideas include checking industry association magazines including the Retail Council of Canada. Franchise shows are a good way to connect retailers and potential entrepreneurs. New start-up businesses should be encouraged through partnerships with educational institutions such as university and college programs as a potential source for retailers (e.g., Timothy’s Coffee was a student project for at the University of Western Ontario). There is no easy way to develop the prospect list; it is simply a lot of grinding.

Recruiting efforts should always begin locally by looking for businesses who are willing to expand or whose leases are expiring. Visit other nearby communities. Take note of local, regional and national retailers such as Runners’ Choice in Downtown London, The Bookshelf (bookstore café) in Downtown Guelph, Herbert’s Boots and Details in Alliston, Saturday Afternoons and Becker Shoes in Downtown Orillia as well as Smith’s Markets in Sudbury.

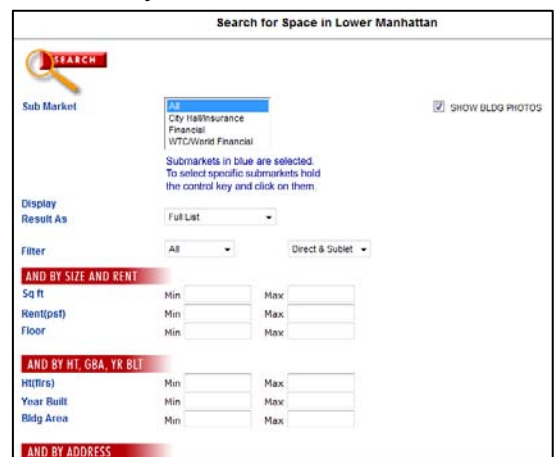
Also, local Downtown Sudbury business owners can saturate the market and create their own competition (e.g., Jan Browning’s Boutique and El Mercado (business partners) and Reg Wilkinson’s Mens Wear and the associated shoe store). Additionally, other retailers have actively recruited to complement their own business such as Artists on Elgin.

The City-GSDC/BIA/DVDC will need to research high-prospect retailers. They should look for information on the number of stores a company has, where they are currently expanding, their typical store size, and the demographics of the markets they are already in. Some of this work has been started in the contact list that has been provided.

Online Activity

Vacant space is marketed on the DVDC’s websites and should be continued to be enhanced through social media and other interactive and search tools.

More detailed recruitment programs including interactive search functions may be warranted in the future. Examples include Downtown Alliance in NY.



Developing Facebook, YouTube, and Twitter accounts related specifically to retail recruitment programs are important social media steps. Small videos on recruitment success stories can be easily developed and disseminated to would-be entrepreneurs. Retail success stories and sales productivity information from other local Downtown businesses need to be collected. The City-GSDC/BIA/DVDC need to be able to talk to prospective businesses on the sales level of the better performing stores (ranges instead of exact figures) and successes related to businesses that opened and then continued to expand. Short video clips attached to each organization's website on these peer recommendations can be effective selling tools. In addition, the City-GSDC/BIA/DVDC should all have linked websites and link to one central Downtown property finder database.

Marketing Brochure

A professionally prepared and “to the point” marketing/leasing brochure should be prepared and can be used in conjunction with a video or separately as the situation warrants. A folder-style brochure with inserts covering the major marketing points, such as the following:

- An aerial view (how to get there) with key buildings highlighted.
- A site plan of the Downtown Sudbury area showing major developments, planned new developments, and a list of the retailers and major businesses in the area. Vacancies can be shown if there are not too many. In addition, you may start to add potential retailers in vacant spots that you are courting (e.g., show potential restaurant location on the map when courting restaurants).
- Trade area socio-economic profile, employment figures for the trade area, the anticipated student population, and the daily or weekly visitors for events such as Rib Fest, Sudbury Theatre, etc.
- Any sales information would be helpful and may be customized to specific tenants (e.g., average restaurant sales for food service operators). Note this may be very difficult to obtain.
- An overview of “Why You Should be There” selling the benefits.
- A good news story.
- A contact list for owners or brokers and a contact list for the DVDC, the Downtown Sudbury BIA, and City of Greater Sudbury (including potential incentive programs that may become available).

The brochure should be five pages maximum (unbound). Additional pages can easily be added for presentations to specific retailers such as a grocery store or home furnishings store. In addition, the City-GSDC/BIA/DVDC should condense the package to a one-pager (two sided) of salient facts about recruiting in Downtown Sudbury. A basic package may be good for most retail types and for a “foot in the door.” If the retailer requires specific information, this can be customized to their needs and it is a good opportunity to arrange a second meeting.

A video/DVD should also be prepared that showcases Downtown Sudbury using professional images and video footage.

Launch Party

The City-GSDC/BIA/DVDC should coordinate to hold a launch party. Invite people from the contact lists of each organization involved. Send them a special invitation and then follow up with phone calls until you receive a reply. Hold the launch at high profile locations such as City Hall, Sudbury Theatre, or Market Square with wine and cheese (including some local food items) and include a few small gifts or a give-away and a short presentation by the Mayor (10 minutes max.). Send attendees away with the new brochure and DVD. Those not in attendance should receive a sorry we missed you letter plus the brochure and DVD.

Retail Retention and Small Business Assistance Programs

The DVDC and the Downtown Sudbury BIA with the City of Greater Sudbury's Regional Business Centre can assist by developing a number of programs to help new retailers become successful, such as the following:

- Facilitating the process of obtaining licenses, permits, zoning, etc.
- Setting up a new retailer support group to guide new retailers on accounting, banking, buying, customer service, promotion, etc.
- Providing resource referrals such as how to obtain small business incentives (e.g., low cost loans, insurance pools, design assistance from architects, security alarm systems, etc.)
- Improving retailer and other activity wayfinding throughout Downtown Sudbury
- Helping to launch new stores with:
 - "Welcome" ads and posters
 - A mailer to members
 - Customer lists provided by non-competing retailers in the area, and a PR campaign.

Other Ideas - Retail Leasing Incentives

Property owners in Downtown Sudbury should be prepared to offer incentives to help attract quality tenants. Possible program incentives include the following:

- Rent breaks, equal or better than the competition (e.g., one to three months free rent, or an increasing rent structure that is below market rate in the first few years of operation, gradually increasing to market rate, and then it could possibly be increased above market rate)
- Build out the walls, lights, and heating on a five or more year lease but recoup these expenses in the amount of rent (property owners' responsibility)

It should be noted that occupancy costs (rent, taxes, utilities, etc.) should not exceed 15% of sales or 25% of the store's gross margin. Therefore, if landlords expect rents of \$15 to \$20 per square foot plus other occupancy charges, the store must typically do sales of \$150 to \$200 or more per square foot.

Summary of Action Items

- Establish communication and liaison protocols
- Develop a Recruitment Council
- Develop a list of agreed upon recruitment categories and develop block planning
- Weigh pros and cons of possible recruitment incentives as well as recruitment rules such as retail only along Durham Street.
- Ensure coordination of City-owned properties and other government buildings are developed that maximize the retail potential for at-grade opportunities.
- Create a contact list of preferred uses and retailers
- Develop full range of recruitment efforts
- Develop programs at the DVDC, the Downtown Sudbury BIA and the City (through the Regional Business Centre) that can help foster small independent businesses

5.2 Retail Recruitment Procedures

The following are key procedures for recruiting retailers.

- Arrange one-on-one meetings with all key tenant contacts (e.g., Oberfeld Snowcap, NorthWest Atlantic, Cara Group, franchisee head offices, plus major local and regional contacts, and small independents and regionals). There is no magic formula; it is simply a repeat process. Get the names of the contacts, arrange a meeting, invite them to Downtown Sudbury for a tour – and then repeat. Always try to offer the tenant a range of potential locations.
- Need to decide follow up protocol and who will be responsible – The recruiter must be in constant contact with potential tenants. This heavy logistical responsibility requires impeccable record keeping of who was contacted, how, response, follow up date, and response. Always take the follow up conversations as an opportunity to learn what can be done to improve the prospects of recruitment in Downtown Sudbury (e.g., do they require a higher population threshold, higher income residents, more visibility, etc.).
- The value proposition (selling the benefits of a Downtown Sudbury location) should focus on the residential development and the activity centre initiatives (arena, employment, theatre, university, library, and museum). In addition, the quality of the existing retailers and any success stories should be emphasized.
- Make use of follow-up letters, even if the prospect does not come through. They can serve as a reminder about Downtown Sudbury, especially when expansion plans arise in the future. Letters should reiterate information about the sites, the benefit of a Downtown Sudbury location, and invite the prospect to call anytime.
- Always set goals for the number of prospects to be contacted in a given month or other specified time.
- Send monthly newsletters or email blasts to the contact list (as well as existing retailers, property owners, developers, brokers, and interested stakeholders). As stated, follow-up using a constant flow of information is the key to developing and maintaining interest.
- Publicize successes in email blasts, newsletters, etc.

- Try to generate as much media interest for Downtown Sudbury’s retail recruitment as possible. This amounts to free advertising for the program. Send out press releases that highlight all of the good things about Downtown Sudbury, including a list of the businesses that have agreed to locate there and what sites they are moving to. This may spark interest in other available properties.
- Consider advertising to generate leads including print, radio, and television. Local stations may be looking for an interesting story about Downtown Sudbury recruitment efforts.

Example of Local Success Stories

BUSINESS
MAY 2010 9

BUSINESS

ADVERTISEMENT
BJ's Appliances and Burning Desires Gifts

MAKING BUSINESS WORK IN BARTONVILLE

Ask Tanya Sheets how her business on Barton and she will tell you it has never been better.

Tanya and husband Joe Lopes operate BJ's Appliances and Burning Desires Gifts. Tanya has been in the business of buying and refurbishing appliances for more than 20 years, earning her the nickname, the Appliance Girl.

Customers visit her shop at 365 Barton Street East at Oak Avenue from all over Hamilton, Ancaster, Dundas and as far away as Oakville, Mississauga and Toronto.

She set up shop in the current location 8 years ago and despite what outsiders might perceive about the economy of the area, Tanya says business was good enough that she decided to open up a second store to sell scented soy candles and gifts. Tanya bought the building containing the appliance store and leases a store next door for Burning Desires Gifts.

"There are great buildings on Barton with lots of potential," says Tanya. A typical Barton street storefront with a floor of apartments above can range in price from \$65,000 to \$170,000.

In Tanya's case, she and Joe occupy one of the apartments and the other two apartments more or less pay the mortgage on the entire complex.

What Barton Street needs says Tanya is more merchants who live and work in the neighbourhood as she and Joe do.

"Everything you need is here, and it's all within walking distance," Tanya notes pointing to long-time grocery and butcher shops like Rumor's and Duane's nearby, as well as pizzeria's and convenience stores. Even the Bank of Montreal moved back into the neighbourhood a while back.

Tanya is focused on growing the business at Burning Desires Gifts, with its offering of her hand-made scented soy candles, aromatic soaps and lotions. She is starting to promote a new exclusive line of Legends of Avalon figurines and a new line of animal figurines.

You can visit BJ's appliances at 365 Barton Street East Hamilton, - (905) 529-2319 or click on www.bjappliances.com. You can see what Burning Desires Gifts have to offer by visiting www.burningdesiresonline.com.

For a list of potential investment opportunities on Barton call 905-928-7888.

"Invest in Barton Village" (The Next Renaissance Area) "I Did!"

Tanya Sheets
Owner of BJ's Appliances
Business Ltd. 905-928-7888

Tanya Sheets, owner with her husband Joe Lopes of BJ's Appliances and Burning Desires Gifts.

Ottawa Street, the Road to Know-How

FABULOUS FURNITURE ON CONSIGNMENT

Maureen of The Millionaire's Daughter has passion for accessorizing and adding zest into rooms. With accessories and furniture coming in store everyday you will always find fabulous quality home decor with great prices to match everyone's budget.

Maureen's extensive experience in interior design and staging can help you find that perfect piece for your home. If you have something in mind, she also takes requests.

So if you're looking to make changes to your living space with adding or removing, Maureen will be happy to help you out!

Maureen

The Merchants of Ottawa Street
905-543-8000 www.ShopOttawaStreet.com
Next feature...Special Fur

Ottawa Street, the Road to Know-How

COME, SEE, TASTE WHY PEOPLE ARE LOCO ABOUT POCO LOCO

José and Jenise are as passionate and vibrant as their fresh Tex Mex cuisine. Together they bring a tasty menu of homemade Tex Mex located at 1311 Ottawa Street North.

See what they're all about:

- ✓ Fresh
- ✓ Healthy
- ✓ Tasty
- ✓ Homemade

TEX MEX

The Merchants of Ottawa Street
905-545-5626 www.ShopOttawaStreet.com
Next feature...designs on the move

In addition, the Downtown Sudbury BIA can profile the existing business success stories similar to Barton Village and Ottawa Street in Hamilton. This is currently being done for the City by Harold Carmichael's weekly article in the Saturday Sudbury Star.

6.0 Creating a Diverse Downtown Retail Experience

While the previous sections addressed increased retail sales opportunities through the recruitment and retention of retailers and where to place them to create critical mass through ideal adjacencies, this section addresses increased sales through marketing type programs.

To encourage people to visit, shop, and dine in Downtown Sudbury on a frequent basis, the mission should be to focus on those who currently visit either to increase the amount they spend on a given visit or to increase their patronage (visit more often). It is easier to work with current visitors than to convince non-visitors to come to Downtown. These customers are already loyal to Downtown Sudbury and aware of what there is to offer. Programs to increase expenditure incrementally will have a higher payback than programs geared to non-visitors. With non-visitors, there is a higher risk that they will never become Downtown Sudbury shoppers thereby wasting resources.

The following items are summarized as to hospitality, local, or specialized retail cluster strategies.

6.1 Hospitality

Issues related to hospitality include not only business development but marketing programs that tie in activities with retailers (e.g., dining opportunities before a cultural performance), as well as safety and management concerns (e.g., patio licensing, noise control, lighting, parking, trash pickup, etc.).

Emotional Marketing

The marketing of Downtown Sudbury for hospitality is focused on exceptional service, choice, good quality businesses, and overall atmosphere. Marketing images need to reinforce these concepts. These are more emotional type programs. Examples of more emotional-type marketing that is stronger on visual ideas include the following from Downtown Long Beach.

In addition, the marketing program should be more activity oriented such as those used by HP that state that the consumer should be there having these amazing experiences and then sharing them with others. Peer reviews in marketing today are at the pinnacle.



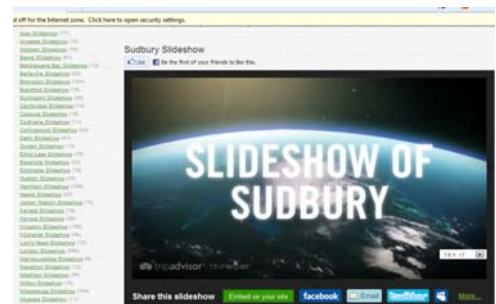


HP spent over \$300 million on a campaign telling consumers it's all about "you," and "you" should be taking pictures, sharing, forwarding, and printing them, AND, posting photographic essays on an HP Website. Downtown Sudbury should be telling prospective visitors that they should be in Downtown Sudbury having an amazing time with family or friends, taking pictures, hiking, shopping, relaxing, eating – and then sharing those memories with other peers on Downtown Sudbury BIA's website.

Stories and Peer Reviews

Finding and encouraging stories of people's experiences in Downtown Sudbury is an important element of changing people's perceptions of the area. These stories need to be included in social media outlets, websites, and distributed.

PR is an important element as well. It is often better to focus on getting a positive news story written about Downtown Sudbury in other communities. Then it is important to bring those stories to the local media's attention thereby generating good local press.



Concierge Program

Visitors can be marketed through partnerships with regional tourism organizations. In addition, businesses need to develop effective concierge programs with local arts, cultural, recreational, accommodation, and other tourism-related organizations, businesses, and associations. The most effective marketing is in the form of direct referrals. The accommodation staff/owners often make restaurant reservations on behalf of visitors or offer suggestions. Downtown Sudbury businesses should be courting these businesses to ensure that their business is recommended by the front-line workers.

Special Interest Groups

Marketing to groups, recreational groups, heritage groups, local dog walkers, girls' weekend out, golf weekends, university and college students, etc., should be assessed.




The imagery and communication is simple but effective. The message is for multi-generational families to get together in Downtown Naperville for a little shopping, dining, and overall good time. Family members recommend good shopping places to other family members and often use excursions such as this to get the family together. More people together for potentially longer periods translates into higher sales for retailers.

Event Attendees

If there are events and programs produced by the BIA or website sign up, there should be efforts to collect visitation data to build a database of customers that can be part of a direct mail campaign.

Noise and Safety

Noise controls are a concern especially with increased residential. The following example from Downtown San Diego uses a multi-pronged approach including the design of buildings, open communications, and other programs to address potential noise and safety issues.

SAN DIEGO CITY OF VILLAGES												
CREATING SAFE AND VIBRANT PLACES TO SOCIALIZE												
Draft			Music SESSION					Noise MUSIC		September 12, 2002		
QUALITY OF LIFE												
TRANSIT			ENTERTAINMENT		CONVERSATION			BUSINESS ACTIVITY			VENDORS	
Bus	Train	Car	Live	Recorded	Patio	Parking	Smokers	Deliveries	Trash	Equipment	Entertainers	Products
<p>Mixed use districts with higher concentration of residential units in retail and business districts precipitates a growth in dining and entertainment businesses for people seeking places to socialize. A number of factors combine to impact public health and safety and quality of life. One indicator of emerging conflicts is noise. Noise is simply the intersection between sound and the ears of someone who is disturbed by the sound. When there is no sound, there is no noise. When there is no person, there is no noise. When the sound is not disturbing there is no noise.</p> <p>There are many variables as to when sound becomes noise – sound level, quality and quantity. Among the sources are transit vehicles, entertainment, conversation, business activity or street vendors or entertainers. Noise can be increased or decreased through various means including the movement of people to their vehicles, the path vehicles move, crowd location and size, proximity of the noise generating activity to people who may be disturbed, construction of the structure and schedule of activity. Often age of people or intoxication can be contributing factors.</p>												
VARIABLES												
PEDESTRIANS			PEOPLE		PROXIMITY			STRUCTURE			SCHEDULE	
Pedestrian Flow Parking Area Signage Taxi Stands			Outdoor Seating Crowd Management Entrance Lines Promotions Intoxication Underage drinking		Residents Outlet Density Outlet Type Other Retail Parking			Sound proofing Windows Entrance Storage Access (trucks)			Hours of business Entertainment Deliveries Trash Removal	

CONFLICT RESOLUTION	
<p>Conflict resolution is the process of reducing or eliminating the sound, redefining the sound as to its source and purpose, or removing the person who is disturbed from the source of the sound. This is accomplished through communication, planning to reduce potential sources of noise or proximity of people to the noise generating activity.</p>	
QUANTITATIVE	QUALITATIVE
<p>The following are summaries of strategies used, typically through an ordinance, to regulate noise issues:</p> <ol style="list-style-type: none"> Entertainment Overlay: A district is designated as an entertainment district or "overlay" for the purpose of concentrating the number of establishments for the convenience of those visiting the area. Modifications are made to noise, parking, schedules and other zoning requirements to accommodate crowds and reduce impact on public health, safety and quality of life. Density: The number of establishments providing entertainment or licensed to serve alcoholic beverages are limited based upon population or restricted by distance between such establishments. <ol style="list-style-type: none"> Consideration: Using a "seating" basis rather than "outlet" basis for calculating density may provide more control over the number and types of businesses. A club with an occupancy capacity of 1,000 would have a greater potential impact on a neighborhood than 10 businesses with occupancy of 100. Proximity: Businesses seeking to provide amplified music or use outdoor speakers (i.e. drive-up windows) are not permitted within a specified distance from a residential unit. Noise Levels: The most common strategy is to regulate the level of decibels of amplified music an establishment can provide. Some cities allow a higher decibel level in a designated entertainment zone or "overlay" while others set a uniform standard when there are residential units in close proximity. Some focus on the more problematic bass or low frequency noise as a standard. <ol style="list-style-type: none"> Challenge: Enforcement can be difficult if measurements are not taken at the actual time the person notices the noise or when noise levels in the area 	<p>The following are summaries of strategies used to</p> <ol style="list-style-type: none"> Parking: Special arrangements are made to limit parking in residential areas to permit parking to prevent establishment patrons from parking close to residences. Pedestrians: Pedestrian flow is regulated, especially during late hours, to keep people away from residential areas as much as possible. Traffic: Automobile traffic is routed through commercial areas rather than residential neighborhoods during closing hours. Promotions: Businesses are discouraged from advertising or using promotions that may increase the rate of intoxication of patrons. Communication: Regular meetings held with club owners and managers, law enforcement, business district and residents to anticipate problems from special events, increased traffic or other sources of noise. Enforcement: Active enforcement of ordinances. Education: Organization of educational events for businesses to inform them of emerging issues or concerns and provide access to resources. Mediation: A formal process to resolve conflicts between residents and businesses either through working with the business to take corrective action, clarify misunderstanding of each individuals rights and responsibilities or agreement to a mutually agreed upon settlement prior to further legal remedies. Disclosure: A formal process of placing on notice residents, businesses, or developers of special conditions and responsibilities.

<p>surrounding the establishment from traffic or other sources is higher than coming from the club.</p> <p>5. Building Codes: New and existing buildings can be required to limit noise through the use of noise proofing materials, location of bedrooms relative to street and/or entertainment business, location of entertainment source in an establishment, location of outdoor seating and placement of speakers, use of sound walls and barriers, location of entrance and exit doors, use of double doors, restrictions on doors being opened during certain hours.</p> <p>6. Schedule: Schedules can be regulated for entertainment, deliveries, trash removal, parking areas.</p>					
STRATEGY					
STAKEHOLDERS	ASSESSMENT	RECOMMENDATIONS	INTEGRATION	EDUCATION	MEDIATION
<p>Alcohol Beverage Control BID's City Attorney Code Compliance Developers Development Services Environmental Services Fire Department Health Department Hospitality associations Planning Department Police Department Public Works Residential organizations</p>	<p>Current Codes: Other Cities: Community Forum: Issues and Trends</p> <ul style="list-style-type: none"> ❖ Gaslamp ❖ Lajolla ❖ North Park ❖ Hillcrest ❖ Little Italy ❖ Pacific Beach ❖ Ocean Beach ❖ East Village 	<p>Revise Current Ordinances Create New Ordinances Develop Alternate Strategies</p>	<p>Develop a final reading with all key stakeholders to properly integrate focus, standards, enforcement, jurisdiction, and resolution.</p>	<p>Organize information into a concise resource directory for businesses, residents and developers.</p> <p>Include resource directory with disclosure agreements</p> <p>Incorporate information into Hospitality Business Orientation</p> <p>Organize annual Hospitality Roundtables to review status of compliance and areas needed for improvement</p>	<p>Develop a systematic process for mediating conflicts between residents and businesses or between businesses.</p> <p>Develop a process for remedial assistance for businesses engaged in practices causing conflicts or violations of ordinances.</p>

6.2 Neighbourhood Retail Goods and Services

Local residents want to feel part of the neighbourhood that is Downtown Sudbury. They want to be recognized when they walk into a store, have the coffee shop already know how they like their coffee, and to have a trusted relationship. Marketing should carry a stronger commitment to marketing the unique personalities of the business owners, managers, staff, etc. of the local businesses.

Marketing to local residents will include a combination of overall atmosphere and emotional draws but should be more heavily weighted toward creating a community whereby you can meet the local shop owner and socialize with friends.

Marketing in postcards and local newspapers as well as email blasts should tell the story of the local business people. Other examples include:

Hassan's Fine Jewellery

Owner: Hassan S. Moustapha
 Phone: 519-936-7020
 Fax: 519-936-7019
 Email: info@hassans.ca
 Web: www.hassans.ca

Hassan's Fine Jewellery has served London and area since 2004. Hassan's is a family-owned and operated business. We are happy to fulfill customer's jewellery requests and are dedicated to help with our service. We take pride in our service and hope to earn your patronage and trust through integrity. Hassan's is a complete service centre for jewellery and watch repair. Hassan, our Goldsmith, is available Monday through Sunday for your service.

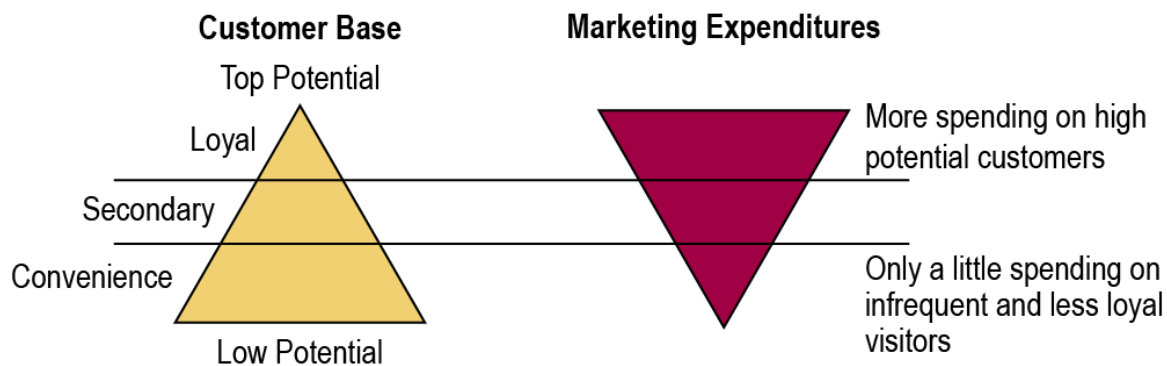
We offer fine gold jewellery, silver and accessories as well as small gift items. We also custom design jewellery and also offer cleaning, buffing, settings, engraving, plating and change watch batteries. We also carry a huge selection of bridal accessories.



Hasbeans

Owner: The Smith family
 Phone: 519-663-0237
 Email: paul@hasbeans.ca
 Web: www.hasbeans.ca

The Smith family has been part of Covent Garden Market for more than 125 years. Our business is now operated by: Paul (3rd generation), Debbie (4th) and Joel (5th). We are proud to offer only specialty coffees, sometimes known as gourmet coffees. We search world markets for only the finest grades in order to offer you the best of coffee with the finest of flavour. All our coffees are roasted daily on our premises. We make it a promise to only offer coffees that are roasted by us. Please feel free to drop by and see your coffee being roasted. Ask about our roasting process and see our offering of more than 39 varieties blends and roasts.



Marketing should focus on the top loyal customers that have a higher direct impact on sales revenue and gross margins.

Loyalty Programs for Local Residents, Local Businesses

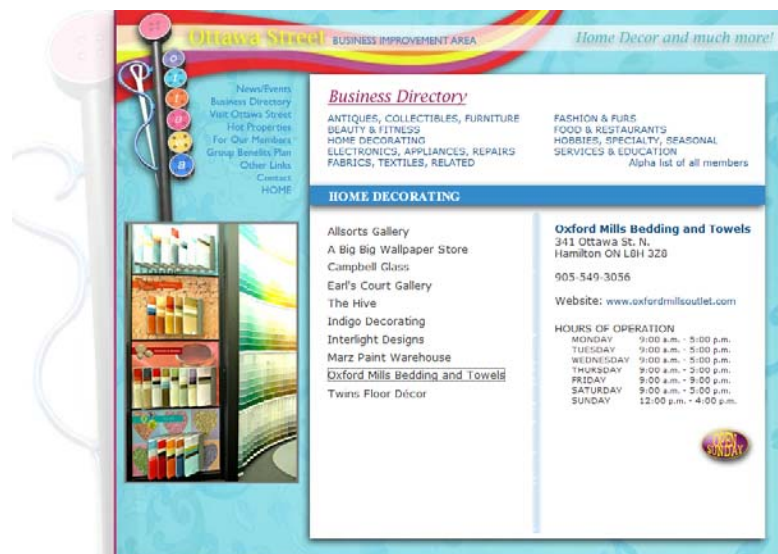
A loyalty card may also be considered for rewarding the most loyal customers with gift certificates and additional programs. The following is an example from Ancaster Heritage Village BIA on the promotions and discounts offered to other BIA members, but this can also be extended to other local residents.



Ancaster Heritage BIA Member Discounts

Hours of Operation

- Given that hours of operation are a concern, the following may be considered:
 - Encourage property owners to include standard hours in their leases with tenants.
 - Continue communication with merchants to keep longer hours of operation.
 - Offer incentives from the BIA in terms of additional marketing (e.g., for each business on the website indicate with a special sticker those that are open Sundays, or after 6:00 p.m.).
 - Businesses can offer to help out smaller businesses with offers to watch their stores while they run errands.



In the above example from Ottawa Street in Hamilton, those business that are open Sunday receive a special marketing sticker on the website from the BIA to show to consumers who is open that day.

6.3 Specialty Retailer Niches

Specific ideas for independent destination retailers in Downtown Sudbury include the following:

- Work on product spotlighting – A customer will usually turn or look right upon entering a store. Create a power wall display of goods that will impress the customer.
- Do not be discount driven – All ages are price conscious and discounts only attract the least loyal. Rather, offer rewards or something of value. For instance, a free slice of pizza with order; free scarf with purchase over \$100; \$20 off purchase of \$100 or more, etc. Percentage discounts just become meaningless in a sea of other advertising specials. Also, ensure there is a time limit so the customer will feel pressure to visit and buy.
- Food service and food and beverage stores should be encouraged to offer free samples. Restaurants should give free appetizers, amuse bouche, or free desserts to loyal patrons, and offer sampling on the street to passersby.
- Be solution-oriented – This is what we offer; this is what problem it solves; tie to the local economy; include an expiration date (come and get it now).
- Use direct marketing as much as possible. Sign up visitors for Downtown Sudbury BIA or to your store. Ask for name and birthdays, anniversary, etc. Offer something free for signing up (e.g., sandwich, scarf, pair of socks, appetizer). Send them a gift on special dates (their birthday, wedding anniversary) as a thank you that entitles them to \$5 or \$10 off something in your store.
- Use programs such as Constant Contact through email to see if they are keeping in touch and to follow through with more marketing programs.



City of Greater Sudbury

Downtown Sudbury Mobility and Infrastructure Strategy

**Submitted to City of Greater Sudbury
by IBI Group**

June, 2011



Table of Contents

1	Overall Mobility and Infrastructure Strategy.....	2
	1.1 Three Pillars of the Mobility and Infrastructure Strategy	3
2	Walking	4
	2.1 Objectives	4
	2.2 Policies and Actions	5
3	Cycling	11
	3.1 Objectives	11
	3.2 Policies and Actions	12
4	Transit	16
	4.1 Objectives	16
	4.2 Policies and Actions	17
5	Driving and Parking	20
	5.1 Objectives	20
	5.2 Policies and Actions	21
6	Sustainability	24
	6.1 Objectives	24
	6.2 Policies and Actions	25

1 Overall Mobility and Infrastructure Strategy

The vision for transportation and infrastructure in Downtown Sudbury reflects a shift in thinking in urban areas across North America. There will be a greater emphasis on expanding mobility choice, developing complete streets, and creating safe and vibrant streetscapes. Moreover, the strategy will focus on developing, maintaining, and enhancing connections between Downtown Sudbury and the surrounding communities to reinforce Downtown's role as the heart of Greater Sudbury. The environmental, social, and economic sustainability of the transportation and infrastructure systems will serve as the cornerstone of decision and policy-making in this plan.

The transportation network in Downtown Sudbury works well in moving residents, visitors, and workers into, and out of, the area. Congestion is not perceived to be an issue; parking is plentiful and affordable. It is forecasted that demand on the network will increase over the life of the Downtown Plan. The road network, however, has more than sufficient capacity to meet growth demands.

As a result, a tremendous opportunity lies in the streets of Downtown Sudbury to make incremental changes in the configuration and layout of downtown streets to facilitate and promote other modes of transportation other than the car. These changes can help offset the impacts of increased travel demand and shift trips onto more sustainable modes, such as walking, cycling, and public transit.

1.1 Three Pillars of the Mobility and Infrastructure Strategy

There are three main pillars to the Downtown Sudbury Mobility and Infrastructure Strategy. These overarching objectives guide the plans, policies, and initiatives that will help achieve the vision for transportation, infrastructure, and the overall Downtown Plan.

1. Maximize Use of Existing Infrastructure

The transportation network is well positioned to handle projected trip growth over the life of the plan as there is sufficient capacity in existing infrastructure. The Strategy focuses on finding incremental improvements to accommodate growth. These improvements could include 'right-sizing' road space to accommodate other modes of transportation and filling in gaps in the network to improve connections.

2. Promote Sustainable Modes

The predominant mode of access to and from downtown is by car. The Strategy will promote sustainable modes, such as transit, walking, and cycling, to access and move around downtown.

3. Put Pedestrians First

The key for a safe, active, and vibrant downtown is to put pedestrians first. The Strategy will accomplish this by ensuring the needs of pedestrians are met, whether it is to build and expand sidewalks, improve the safety of crossings, or encourage active uses to create a pleasant walking experience.

2 Walking

Everyone is a pedestrian in Downtown Sudbury. Walking gets us from transit stops and parking spots to building entrances. A warm, sunny day brings everyone out on the street for a stroll. The pedestrian network will play a key role in the future of Downtown Sudbury. The Strategy will improve its connectivity and quality to support the Downtown Plan's overall goals for a beautiful and vibrant centre for Greater Sudbury.



2.1 Objectives

1. **Make all downtown streets walkable.**

The Strategy will identify and address gaps in the pedestrian network and missing/deficient infrastructure on streets in Downtown Sudbury. Adequate and attractive space for pedestrians will be ensured on all downtown streets. All streets will be accessible for persons with mobility challenges.

2. **Create a safe pedestrian environment.**

Ensuring the safety and security of pedestrians is essential to make Downtown Sudbury more walkable. This means reducing vehicular travel speeds through traffic calming, improving intersections to reduce conflicts between pedestrians and cars, and creating well-lit and visible spaces at night.

3. Enhance the experience of walking.

Walking through Downtown Sudbury should be a pleasant and engaging experience, achieved by creating aesthetically pleasing streetscapes and active street frontages. Wayfinding and interpretative opportunities can increase the legibility and understanding of the pedestrian network and public spaces.

2.2 Policies and Actions

2.2.1 Identify and remove gaps and barriers in the pedestrian network within Downtown Sudbury and to adjacent communities.

Generally speaking the pedestrian environment in downtown Sudbury is quite good. All streets have sidewalks on both sides, the street network is generally continuous and retail streets such as Durham, Cedar and Larch are quite walkable with buildings lining the edge of the street and at a pedestrian scale. Within downtown, there are few gaps in pedestrian infrastructure.

Where the pedestrian network breaks down is at the interface with major arterials and the connections to the surrounding neighbourhoods. There are limited pedestrian crossings of the railway corridor, which is a major barrier between Downtown Sudbury and neighbourhoods to the south and west. The Elm Street at-grade crossing provides good access to the west; however, the Brady Street underpass does not allow pedestrians. The connection to neighbourhoods to the southwest of Downtown is primarily by the Elgin Street/Riverside Drive pedestrian underpass, which is a long, narrow tunnel that presents significant safety and security issues.

Paris Street is perceived as a pedestrian barrier. It is a wide arterial street with higher vehicular volumes and travel speeds. Traffic calming and intersection improvements (See 2.2.2) would improve the pedestrian environment.

Key projects to address gaps and barriers in the pedestrian system include:

- **Cedar Street Pedestrian Bridge:** In conjunction with the expansion of parking west of the rail corridor, a pedestrian bridge over the rail corridor at Cedar Street would be ideally located to connect the western part of Downtown with the surrounding community. The bridge should be designed as a showpiece, ideally out of wood consistent with northern architecture.
- **Extension of Larch Street:** The overall Downtown Plan envisions that Larch Street will be extended across the rail corridor to the west. This would significantly improve pedestrian connectivity.
- **Riverside Pedestrian Tunnel Upgrade:** The existing pedestrian tunnel under the rail corridor at Riverside Drive is functional, but not perceived as safe or attractive. Replacing this tunnel with a bridge

may address these concerns, but would likely cost \$1-2 million. Similarly, providing for pedestrians under the Brady Street tunnel would require major changes to this structure. Consistent with Pillar #1 of this strategy, it is recommended that incremental changes be made to improve this tunnel. This could include shortening the tunnel such that the access comes on the south side of Elgin Street as opposed to the north side. It could also include lighting improvements, security cameras and programming to increase the use of the tunnel.

- **Nelson Street bridge upgrades:** The Nelson Street bridge is reasonably functional, but with some minor upgrades, this bridge could become a more useful and visible connection to the surrounding neighbourhood. Upgrades should include re-painting, repaving and demarcating the approaches (currently the approaches simply lead into the adjacent roadways), traffic calming on Elgin Street before and after the bridge, and integrated connections to the proposed Elgin Street Greenway. The Nelson Street Bridge would also make a good location to place promotional signage for active transportation.

2.2.2 Implement traffic calming on streets where vehicular speeds create pedestrian safety issues.

Traffic calming measures already exist on streets within the Downtown. Many intersections feature “bulb-outs” which force vehicles to slow down and reduce the turning radii. Crosswalks have special paving or masonry work to increase visibility.

On arterial streets, high vehicular speeds are often raised as a safety concern, reducing the attractiveness of the pedestrian environment. A balance between maintaining the flow of traffic and improving pedestrian conditions will be the goal of traffic calming on these streets. Minor changes, such as reducing lane widths, could be immediate actions that would calm traffic. The additional road space could be used for other calming measures, such as bicycle lanes, sidewalk expansion, or providing a planted boulevard. Possible locations for traffic calming and potential techniques (to be determined following more detailed study) include:

- **Minto Street:** Implement curb extensions and raised cross-walk at Tom Davis Square-memorial Park crossing
- **Paris Street:** In longer term, widen and enhance tree planting in median between Van Horne and Ste Anne Road
- **Brady Street:** reduce speed limit from 60 km/h to 50 km/h and implement on-street parking during non-rush hours between Grey Street and Paris Street. Future street-front uses on the south side of the street will also provide a calming effect.
- **Ste Anne Road:** Implement lane reductions to allow for bicycle lanes (See Section 3.2)

2.2.3 Retrofit intersections on arterial streets to improve pedestrian safety.

The intersections on Paris Street, Brady Street and Ste. Anne Road are key to improving pedestrian connections to adjacent communities to the north, east and south of Downtown Sudbury. Currently, the width and physical layout of the intersections make it difficult to cross by foot.

To improve these intersections, physical and operational modifications should be considered, such as:

- the removal of right-turn channels, or, where they cannot be removed, expanding the pedestrian islands;
- reducing the curb radii at corners to force vehicles to slow down when turning while reducing pedestrian crossing distance;
- providing median refuge islands to allow two-stage crossing of wide arterial streets, such as Paris Street;
- use wide zebra-stripe road marking or different paving materials to create more visible pedestrian crossings to all major intersections; and,
- Introduce pedestrian countdown signals.



Pedestrian scale lighting



Improved Ste Anne's Road crossing

2.2.4 Improve night-time safety by providing pedestrian-scaled lighting and encouraging passive surveillance.

Pedestrian-scaled lighting is important in providing a safe and secure walking environment during the night. The smaller downtown streets currently use mid-height lighting that provides a moderate level of pedestrian-scale light. Most other main streets, such as Elgin Street, Elm Street, and Brady Street, use standard height lighting.

Recent proposals for streetscaping on Elgin Street propose for decorative street lighting at both the standard and pedestrian levels. This approach should be considered when street lighting is installed or renewed in the downtown.

2.2.5 Provide a pedestrian-oriented wayfinding and signage program in Downtown Sudbury.

Existing wayfinding and signage in Downtown Sudbury is primarily oriented to drivers. There are large signs at intersections along arterial roadways directing to the nearest parking lot and attractions, but directional signs within primary pedestrian areas in downtown. Street name signs are also inconsistent. Along arterial roads, street name signage is usually placed in locations that are difficult for pedestrians to use, such as on a pole in the median of the roadway. Within downtown, there are some intersections with stylized signage which may be difficult to understand, some with standard signage, and a few intersections with no signage.

A coherent and visible wayfinding system would make it significantly easier to navigate downtown by foot, especially for people who are unfamiliar with the city. Interpretive features, such as historic plaques, sit-out areas, and public art would provide added visual interest to the streetscape.

In general, urban wayfinding signs must:

- Be attractive;
- Direct to smaller destinations;
- Be part of an overall city identity
- Provide direction over very small distances at lower speeds;
- Compete with street, regulatory and storefront signs for the attention of the motorist/pedestrian; and
- Be planned and designed with a consistent set of standards

Examples of different levels of signage are provided below. The City of Sudbury has a unique opportunity to develop a comprehensive signage and wayfinding program for the Downtown in conjunction with the implementation of the overall Vision and in partnership with the BIA and other stakeholders.



Entry/Gateway signage



Pedestrian and Bicycle oriented signage



Orientation signage



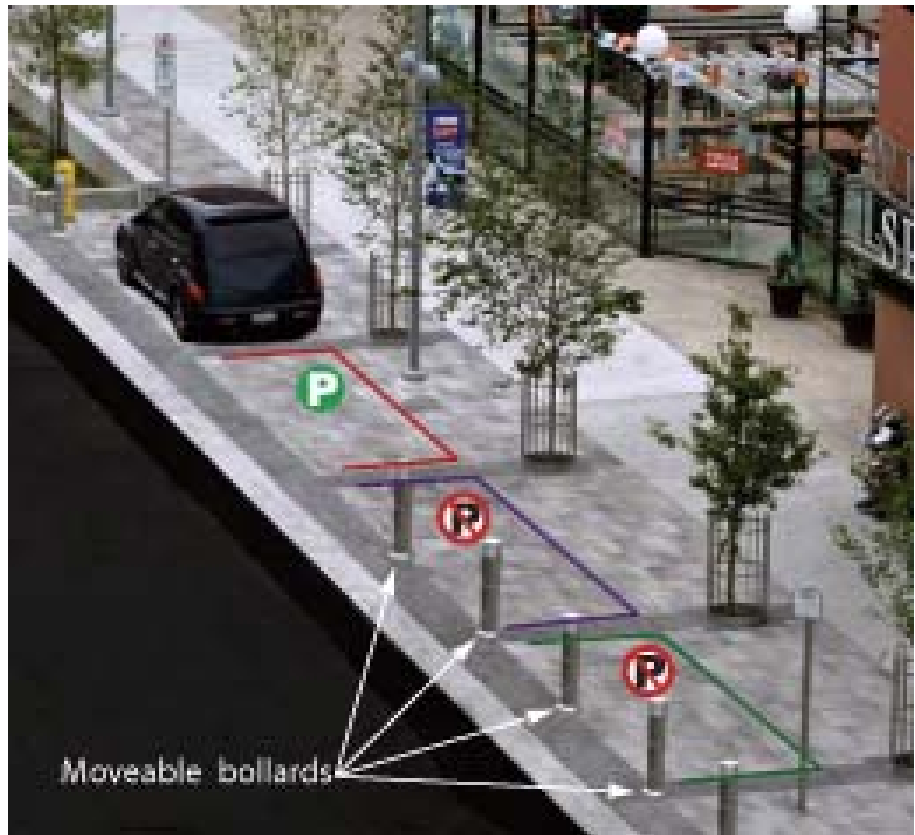
Heritage interpretation signage

2.2.6 Creating pedestrian priority areas with a high quality pedestrian environment.

As noted previously, most streets within Downtown are already fairly walkable. However, two streets in particular could be enhanced to improve the overall pedestrian experience even more: Durham Street and Minto Street.

- **Durham Street:** The nature of uses along Durham Street makes it ideally suited to an enhanced level of pedestrian treatment. The proposed strategy, subject to further discussions with businesses, would be to implement a flexible parking strategy. Essentially, this involves the use of bollard to temporarily close some or all parking spaces to provide for pedestrian space. IBI Group recently design and implemented this concept for King Street in Kitchener whereby bollards are used to restrict parking in the summer and removed to

allow parking during winter months. Six months following construction the feedback has been extremely positive. Treatments for Durham Street could also include raising the entire street in front of the YMCA or between Cedar and Larch Street to provide event space in conjunction with temporary closures. Treatments would need to be scaled to available funding. For example, the entire King Street project in Kitchener was in excess of \$8 million, including underground services.



Flexible sidewalk/parking and road closures concept in Kitchener, Ontario

- **Minto Street:** As part of the redevelopment of the block between Elgin Street and Brady Street, Minto Street should be re-designed as a pedestrian oriented street. This would include narrower traffic lanes, raised intersections and built-in curb extensions, for example.

3 Cycling

Cycling is an affordable, convenient, and healthy form of transportation that is increasing in popularity in urban areas across North America. Sudbury is in the midst of developing a connected cycling network and Downtown will play a key role as the network's hub. The Cycling Strategy aims to make Downtown a major destination for both commuter and casual cyclists. Even if for just the summer months, the presence of cyclists will add "people" to the Downtown.



3.1 Objectives

1. Connect Downtown Sudbury to the cycling network.

There are many activities within and around the Downtown which are within an easy cycling distance. These include Bell Park, Laurentian University, Sudbury Arena and the downtown transit terminal. With improved connections and facilities, cycling could become a viable mode of travel between these activities for a greater portion of the population.

2. Create a safe environment in which to cycle.

Most streets within the downtown have low vehicular volumes and speeds and are ideal environments for mixed-traffic cycling. However, there are several streets where high traffic volumes and speeds lead to unsafe conditions for cyclists. The Strategy will identify opportunities to improve safety for cyclists and other road users.

3. Make cycling a viable transportation alternative.

Cycling downtown can only become viable if amenities are provided at trip destinations. The most important of these amenities is short- and long-term bicycle parking, which is in short supply throughout Downtown Sudbury. Programs to promote cycling will be considered, such as encouraging employers to provide change facilities and ride to work outreach events.

3.2 Policies and Actions

3.2.1 Build safe and direct cycling connections from downtown to the City's existing and planned bikeway network.

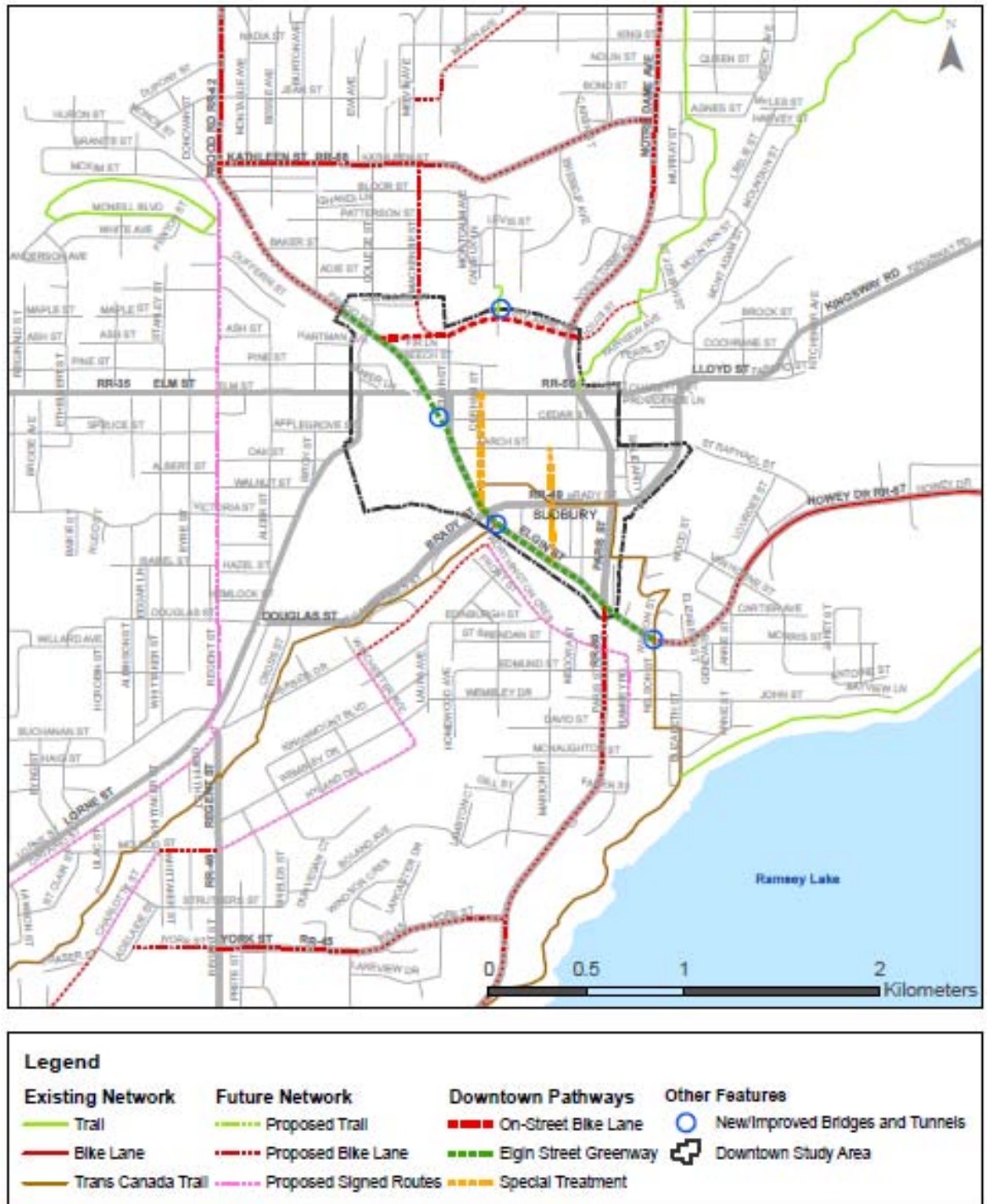
Typically most modestly experienced cyclists can bike 5-10 km with minimal effort. Even at 5 km, this means that a large number of Sudbury residents are within an easy cycling distance from downtown. With improved connections, it is anticipated that a greater number of residents will choose to bike to and from Downtown.

In 2010, Sudbury completed a major Active Transportation Plan which identified a number of planned cycling improvements in and around the downtown. This plan built on the 2006 Bicycle Advisory Panel recommendations. These plans were taken as the starting point for identifying improved facilities and connections around the downtown.

Exhibit 3.1 illustrates the planned cycling network and its relationship to Downtown. In effort to connect the downtown to the broader cycling network, several major improvements are recommended:

- **Ste Anne Road Bike Lanes:** This would provide a northerly connection between the Elgin Street greenway (see below) and the trailhead east of Notre Dame Ave. It is likely that lane reductions would need to be implemented to allow for bike lanes on Notre Dame; however, based on existing volumes, this should not be a problem. Average annual daily traffic volumes were 8,000 in 2009. Sharrows could be provided on Louis Street to highlight its linkage to the trail system.
- **New and upgraded rail corridor crossings:** A new pedestrian and bicycle bridge is proposed at Cedar Avenue to connect existing and future developments on the west side of the CP corridor. As discussed in Section 2, existing crossings at Riverside Drive and Nelson Street are proposed.

Exhibit 3.1: Existing and Proposed Cycling Connections



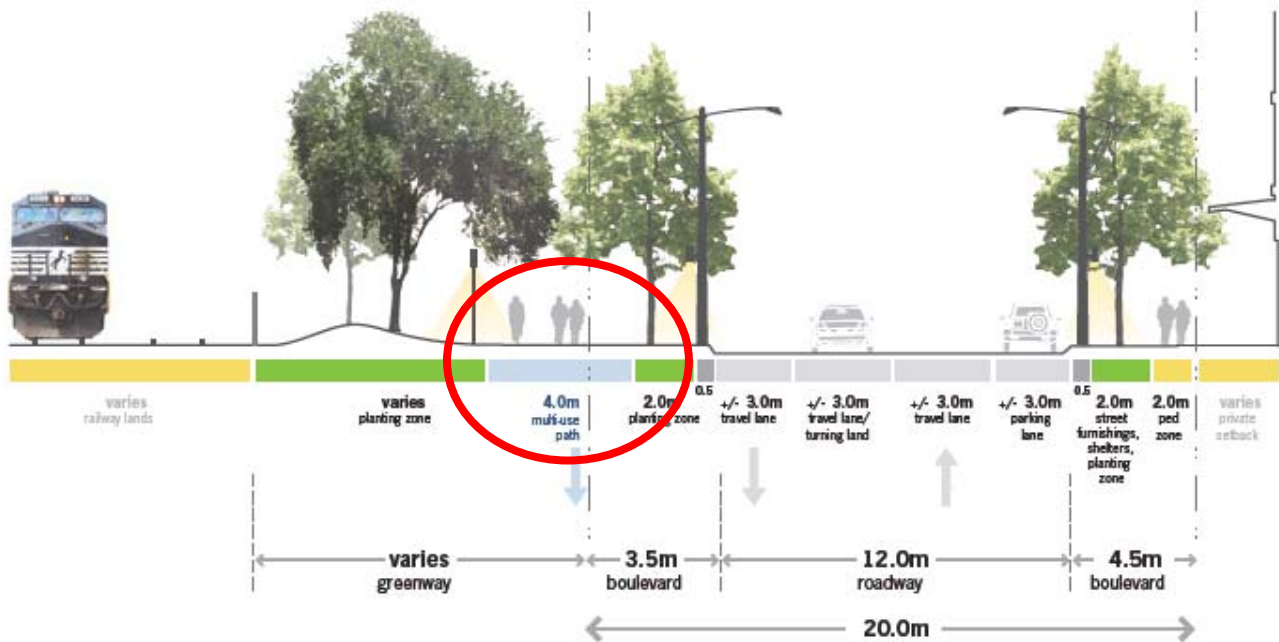
Map prepared by IBI Group based on the City Of Greater Sudbury Bicycle Advisory Panel Bicycling Master Plan and the Official Plan Trails Map

3.2.2 Transform Elgin Street into a Major Greenway and Cycling Connector

Downtown Sudbury is lacking an active transportation corridor that links together the various activities within the downtown and in adjacent communities. Elgin Street is ideally suited to fulfilling this role. It is therefore proposed that Elgin Street be redeveloped to include a major greenway system for cyclists and pedestrians. The central greenway would include a multi-use path, sidewalks, greenery and other amenities to draw people to this area. It will also serve to buffer the downtown from the rail tracks.

One of the benefits of the Elgin Street Greenway is that it will be a highly visible project and will serve to get people excited about cycling opportunities. According to the Transportation Association of Canada’s recent publication entitled Active Transportation: Making it work in Canadian Communities, “Participants from several successful municipalities pointed to the value of a backbone facility—that is, a corridor or node that is well-used in practice but also symbolic to elected officials and the general public. The demonstration effect of such visible facilities can have a dramatic cultural impact”.

A potential cross-section for the greenway is presented below. Given the varying characteristics of the right-of-way, the cross-section will need to be somewhat flexible. For example, on-street parking could be provided in some locations, but restricted in others to allow for turning lanes. From a cycling perspective, it is recommended that the ideal cross-section for the multi-use path be 3.0 m, not including space for pedestrians. If the path is shared with pedestrians, the width should be 4.0 m.



3.2.3 Implement a program to install on-street, short-term bike parking.

The availability of secure short term parking can make a big difference to the overall cycling experience. This can also add the appearance of the street environment in that bikes are not locked to signposts, trees and other objects. The City should initiate a program to install bicycle racks throughout the downtown. Simple rings are preferred, although innovative designs symbolizing the Downtown could be pursued.

Once a design is chosen, bike racks would be installed at key locations such as near the transit terminal, Tom Davies Square and near restaurants. Business owners could also request racks to be installed.

3.2.4 Encourage new and existing developments to provide sheltered long-term bike parking and change rooms.

Many cities are requiring bicycle parking to be provided as part of all new developments. While it is not essential for Sudbury to implement formal bicycle parking standards, it should be encouraged.

The City can initiate this strategy at municipal buildings and foster the provision of bike parking in other locations through partnerships and programming efforts. Other “soft” infrastructure may be provided at municipal buildings such as office showers.

3.2.5 Explore the feasibility of a municipally-operated bicycle station to provide central, long-term bike parking and change facilities.

Since cycling is not yet a mainstream mode for work and shopping trips to Downtown, the creation of a bicycle hub or station could be a highly visible supporting measure. Essentially, a bicycle station is a storefront type facility where cyclists can go and obtain information or perform basic repairs to their bicycles, with the assistance of others if required. To minimize costs, these stations are often manned by volunteers or students. A storefront along Elgin (next to the future greenway) would make an ideal location for a bicycle station as well as serving to increase activity along this street.

3.2.6 Organize events to promote cycling downtown and increase awareness.

Cycling based events can serve to increase awareness of the potential for cycling. These are usually implemented during the early stages of creating a cycling culture. Although many cities opt to implement bike to work weeks or similar events, Sudbury could start out with a simple bicycle tour involving one or more politicians. Other promotional opportunities could be built around the design and implementation of the Elgin Street Greenway.

4 Transit

Downtown Sudbury serves as the main hub for Greater Sudbury Transit, which carries over 4-million trips annually. Increasing the role transit plays in the downtown will be important to foster economic growth and improve access and mobility choice.



4.1 Objectives

1. Maintain Downtown's central role in transit network.

Virtually every transit trip in Sudbury travels through the downtown transit terminal, which serves as the hub for transit routes across Greater Sudbury. This role must be maintained in order to provide a high level of transit accessibility for Downtown Sudbury.

2. Position transit as the main alternative to driving downtown.

Greater Sudbury Transit is plays an established and prominent role in transporting residents, workers, and visitors to and from the downtown. A key to increase the role it plays will be to adopt strategies that attract riders beyond transit's captive market and position transit as a desirable transportation alternative.

3. Integrate transit into Downtown's urban fabric.

Transit is pivotal in encouraging a more compact urban form; however, for this role to be successful, it must be seamlessly integrated into the urban fabric.

4. Create seamless regional connections.

Increasing the role that public transportation plays in intercity and regional connections in Greater Sudbury and beyond will stimulate increased economic potential.

4.2 Policies and Actions

4.2.1 Maintain and enhance downtown's role as the main hub of the transit system in Greater Sudbury.

Increase transit service downtown.

Transit will be one of the main tools to support growth in Downtown Sudbury. Investing in transit service improves access while reducing the need to build more roads and parking. Research has shown that increased transit service, including more frequent service and extended service hours, is the most effective means to attract more ridership to a transit system.

Downtown Sudbury is currently the hub for every route operated by Greater Sudbury Transit. This gives an advantageous position for the area since it allows access by transit by all areas of the city. This role should continue through maintaining the downtown-focused route structure.

Maintain a Downtown-focused transit network.

Greater Sudbury Transit and the city should explore potential partnerships with destinations and attractions in the downtown that promote the use of transit. Many transit systems have introduced family/group day passes that promote transit use on weekends and holidays. Some systems have also worked with local attractions and destinations to provide discounts or special offers to visitors who present a valid transit pass or transfer. Downtown Sudbury has a clear advantage and opportunity to create these partnerships and programs as it has the highest transit accessibility and the greatest number of attractions.

Improve interregional transit connections.

Finally, transit's central role in Downtown Sudbury can be further improved through improved connections to regional transportation links. Encouraging regional transportation providers, such as Greyhound or Ontario Northland bus services, to provide stops in the downtown would improve access to downtown and connecting local transit service. Bus service should also be introduced to provide a transit link between the Sudbury Airport and downtown. Should VIA Rail service to Toronto be increased or improved, transit connections from downtown to the VIA Station should be implemented.

4.2.2 Improve access by transit into downtown by introducing express routes from key destinations and hubs.

Introduce express bus service.

To provide more competitive travel times and attractive service, Greater Sudbury Transit should explore the feasibility of providing limited stop express bus service from major districts and destinations to the downtown. Some of these destinations could include Laurentian University, the intercity bus terminal, Cambrian College, and New Sudbury Centre.

Explore feasibility of a regional park-and-ride network.

Given the large geographic area serviced by Greater Sudbury Transit, park and ride could also be used provide a high quality express transit connection from the suburban areas into the downtown. Free parking would be provided at central locations in outer communities where connections can be made to non-stop express shuttles downtown. These park and ride lots can also be used to arrange car pools.

4.2.3 Maintain the existing downtown transit terminal in the short term while improving pedestrian crossings and connections.

The Downtown Sudbury Transit Centre is the city's main transit terminal, providing connections to local bus routes that connect throughout Greater Sudbury. There are approximately 15 bus bays on four service platforms with an enclosed terminal building in the middle of the site. The terminal occupies a prominent location in downtown Sudbury, fronting on Cedar and Elm Streets.

The existing transit centre will meet the needs of Greater Sudbury Transit and the downtown in the short and medium term and should be maintained in its present location and configuration. Recent upgrades to the terminal building have improved passenger flow.

In the near term, it is recommended that additional improvements to the pedestrian environment surrounding the transit centre be made. The multiple entrances into the terminal on Cedar Street pose pedestrian safety and streetscape continuity issues. Improved streetscaping, visual buffers, and street treatments at bus entrances could mitigate these concerns. Pedestrian crossings from the transit centre across Elm Street should also be enhanced, such as providing a pedestrian-actuated crossing signal or developing traffic calming such as a shared space to slow traffic.

4.2.4 Explore feasibility of integrating intercity bus and municipal transit services downtown in long term.

In the longer term, the redevelopment value of the Downtown Transit Centre site may provide an opportunity to reconfigure transit operations in the downtown and integrate intercity bus services in a central location. The feasibility of developing a local and intercity bus terminal within the downtown should be explored. This would likely need to be on a relocated and expanded site given the space constraints of the existing terminal.

Greater Sudbury Transit's route structure raises requirements that must be considered in a new transit facility. An on-street terminal may not be feasible for two main reasons. First, the Downtown Transit Centre's role as the main transfer point between many routes requires a compact footprint in order to facilitate these transfers efficiently. And second, wide headways lead to the need for timed-transfers, which require long layovers that are difficult to accommodate on-street.

5 Driving and Parking

Driving is, and will continue to be, the predominant mode of access into Downtown Sudbury. Driving into the Downtown should be convenient and seamless to support local businesses, but not at the expense of the pedestrian environment. Parking should be used efficiently and unnecessary single occupant vehicle trips should be minimized.



5.1 Objectives

1. Increase connectivity of the Downtown Street system.

The strategy will implement small but strategic changes to the Downtown street network to improve connectivity with the surrounding road network. These changes are not intended to increase vehicular capacity, but rather provide additional routing options and allow for other objectives to be achieved (e.g. pedestrian connectivity, traffic calming).

2. Take advantage of streets with excess vehicular capacity to support sustainable transportation and on-street parking objectives

In general, the vehicular level of service in and through Downtown Sudbury is good, with few locations that have recurring congestion issues. This provides an opportunity to use some existing road capacity to achieve other objectives such as increasing on-street parking and providing additional pedestrian space.

3. Manage on- and off-street parking supply.

There is currently sufficient parking supply to meet regular demands, although some lots and on-street segments experience high utilization throughout the day contributing to perceived parking issues. Generally on-street parking is operating at capacity, as it should be. Key objectives for the strategy are to maximize the efficiency of on-street parking, maximize opportunities for shared parking, pursue partnerships with the private sector to develop new supply where justified, and strategies to reduce commuter parking demand through TDM.

5.2 Policies and Actions

5.2.1 Identify opportunities to provide increased connectivity in road network.

Improved road connectivity will result in better traffic routing options and more efficient use of the existing road network. Several strategic improvements are recommended for consideration:

Larch westward extension: The extension of Larch Street westward to Lorne Street will serve to formalize the street system west of the rail corridor for the purpose of development while providing an additional connection into the downtown. This would need to be achieved with a new level crossing, since an elevated crossing or underpass would have significant space and visual impacts. The introduction of a new level crossing of the CP rail corridor will not be easy, since railways generally resist new crossings in built up areas for liability reasons. The City may therefore need to assume liability for this crossing.

Elgin Street Re-alignment: The overall plan envisions a re-alignment of Elm Street to connect with Frood Road. This may have a minor benefit in terms of connectivity, but is not considered beneficial to open up opportunities for development. The cost of such an improvement would need to be weighed against the benefits. Similar to the above improvement, negotiations would need to occur with CP Rail since the signal system for the rail crossing would need to be tied to the new traffic signal which would be required at Elm Street. Just the traffic signal alone would be upwards of \$200,000 due to the complexities of the signal architecture.

College Street-Ste Anne Road Connection: The connection of College Street to Ste. Anne Road would complete a missing link in the ring road system around the downtown. This project has been on the books for a while, but still requires a Class Environmental Assessment before it can be completed. Accordingly, at best this would be a medium term improvement. It is understood that replacement of the rail bridge structure will be required in the next 10 years, and that there may be an opportunity to widen College Street and/or create more clearance at that time.

5.2.2 Expand the off-street parking supply in concert with new development while pursuing joint parking opportunities.

A Strategic Parking Plan for Downtown Sudbury was prepared by IBI Group in 2010. The Strategic Parking Plan estimated future parking demands based on various scenarios of population and employment growth as well as a number of potential future developments in Downtown: The Art Gallery of Sudbury, Northern Ontario School of Architecture, redevelopment of the Market Square building, and the Greater Sudbury Synergy Project. The study estimated future parking demand for 2026 to range between 2,750 and 3,250 – a 12 to 13% increase from the existing observed peak utilization in 2009. This estimate represents an increase in demand of 300 to 800 vehicles.

With an estimated 3,260 parking spaces available to the general public, including on-street and off-street spaces but excluding restricted spaces, the future parking demand will be close to current capacity. However, this is considering supply and demand on a system-wide basis. In reality, available capacity is concentrated in private lots and in the north part of Downtown. Parking capacity may become an issue for lots south of Larch Street. Many of these lots are already in high demand and may be subject to additional demands arising from new developments.

The 2010 Parking Strategy Plan recommended that *“Based on these considerations, redevelopment of parking lots in the southeast downtown area should be considered and planned for to support future growth and development proposals, potentially consolidating at-grade surface lots into a parking structure. Provision of a structure to consolidate parking supply could free up other parking lots for development, and could be designed to meet both current and future increases in demand. The design of a parking structure should also contribute to the urban fabric and integrate the City’s vision to support high quality urban design and increased pedestrian activity”*.

These recommendations are still valid and accordingly the overall plan recommends the creation of three new public parking structures as follows:

- **Parking Structure West:** A combined structure and surface lot expansion west of the rail corridor and south of Elm Street
- **Parking Structure South:** A new structure in conjunction with the redevelopment of the lands south of Brady Street
- **Parking Structure Central:** A strategically located structure to support intensified development in the core, but where providing parking as part of new development would be difficult due to geotechnical and space constraints.

5.2.3 Provide on-street parking wherever possible with simple pricing structures that are responsive to parking demand.

On-street parking is desirable from the point of view of supporting businesses as well as traffic calming. There are several locations where on-street parking could be added without significantly impacting traffic movement including:

- **Elm Street:** On-street parking could be permitted on one or both sides of the street as a pilot project. This would become permanent when the Ste Anne Road/College Street connection is completed. Initially the parking could be free to avoid the need for new meters.
- **Brady Street:** On-street parking in this area would support redevelopment as well as act as a traffic calming feature.
- **Paris Street:** In the longer term, off-peak period parking could be provided on the west side of Paris Street.

6 Sustainability

The environmental, social, and economic sustainability of transportation and infrastructure in Downtown Sudbury must be considered to foster a strong and vibrant community.



6.1 Objectives

1. Promote alternative modes of transportation.

Transit, walking, cycling, and carpooling are all viable modes of transportation into Downtown Sudbury, but need promotion and incentives to increase their use.

2. Ensure an accessible and equitable transportation network.

Transportation into and around Downtown Sudbury should be affordable, equitable, and universally accessible. This means expanding transportation options and removing barriers to accessibility.

3. Support development and growth with sustainable infrastructure.

Growth in Downtown Sudbury will be supported by not just sustainable and complete mobility, but also sustainable servicing and infrastructure.

6.2 Policies and Actions

6.2.1 Increase awareness of alternative modes of transportation through marketing and informational campaigns.

Raising awareness and providing readily accessible information is the key means to promote alternative modes of transportation. Simple measures, such as providing complete transit network information, can provide the information needed to lower apprehensiveness when trying a new form of mobility. Promotional events tied to test-driving a different mode to work, whether it be walk-, bike-, or carpool-to-work days, can dramatically raise awareness and induce changes in travel behaviour.

6.2.2 Encourage the use of travel demand management (TDM) planning in workplaces and new developments to identify and promote alternative modes of transportation.

Travel Demand Management (TDM) is a suite of tools and processes that focuses on providing incentives and disincentives (“the carrot and the stick”) to promote sustainable travel choices. Although these tools are most effective in larger urban centres with significant congestion, many can be adapted for application on smaller centres such as Greater Sudbury. The downtown is an ideal candidate due to the concentration of employment and the relationship between travel choices and land use objectives and goals.

Downtown Sudbury already uses one of the main TDM tools: parking pricing. Higher parking prices have a significant effect on travel behaviour with a high likelihood that alternative travel choices are made, such as transit, especially when the cost of a transit trip is significantly lower than the cost of parking. Other TDM parking pricing strategies that could be implemented in Downtown Sudbury include:

- providing preferential spaces for registered car-poolers; and,
- enacting a levy on parking spaces downtown, which would fund mobility improvements in the area.

TDM can also be used to promote and provide incentives for alternative transportation modes. For example, volume discounts on transit passes can be provided to allow employers to provide transit passes or for groups of employees to access reduced pricing. Cycling can be promoted through the provision of bike parking and change facilities.

6.2.3 Adopt an anti-idling bylaw in the downtown.

Vehicle idling has significant negative impacts on local air quality. An anti-idling bylaw is a tool implemented in many cities to reduce this behaviour. The City should look at best practices from other cities, particularly those with northern climates such as Sudbury, to draft a workable and enforceable bylaw.

6.2.4 Consider environmentally sustainable infrastructure to service downtown growth.

Sustainable principles will extend beyond transportation infrastructure and to the servicing infrastructure for buildings and development. The purpose of this policy is to reduce the environmental footprint of development downtown by adopting sustainable energy, water and wastewater, and waste management practices.

District Energy

Downtown Sudbury is currently serviced by a 5 MW natural gas cogeneration facility that provides heating, hot water, optional cooling, and electricity to a number of buildings in the area. The district energy system was established in 1998 and was the first such system in Northern Ontario.

The City should encourage all new development to connect to the Downtown District Energy Centre and support this by providing infrastructure connections to potential development sites. In addition, the City should continue to support the Sudbury District Energy Corporation to monitor the demand on the district energy network and provide funding and approvals support for future expansion.

Stormwater Management

Sustainable stormwater and wastewater management should also be considered in the Sudbury Downtown Plan. Reducing water run-off by providing permeable paving materials, developing bioswales, and ensuring adequate catchment and detention facilities will reduce the impact of run-off on adjacent waterways. These features can be integrated into streetscaping projects, parks and open space developments, and when city assets, such as municipal parking lots, are redeveloped. The City is currently conducting a stormwater management study and the outputs from this study can be used to develop a plan for water management in the downtown.

6.2.5 Ensure the transportation network is universally accessible.

The *Accessibility for Ontarians with Disabilities Act (AODA)* was adopted by the Provincial government to begin the transition to a barrier-free Ontario. The AODA includes standards for barrier-free transportation, built-form, and customer service and information. These standards must be a part of all planning and projects in Downtown Sudbury.

Greater Sudbury Transit recently became one of the few transit systems in Canada with a fully accessible transit fleet. It also operates a specialized transit system that provides transportation to persons with disabilities. The accessibility of the transit system should be supported in downtown Sudbury by ensuring transit stops and connecting paths are fully accessible.

The accessibility of the built environment must also extend beyond the transit stop. The *Built Environment Standard* in the AODA mandates minimum clearway width, ambient lighting, and wayfinding requirements.

One issue that needs to be addressed is the use of paving stones for sidewalks which are attractive, but present challenges for persons with visual limitations and those in scooters and wheelchairs.

6.2.6 Identify and develop a plan to address long-term servicing needs in the Downtown and across the city.

Long-range planning is an effective way to manage servicing needs and their impacts on capital expenditures. This in turn gives greater certainty when planning capital budgets and funding requirements – either from development or through other financing measures.

An overall land servicing plan should be conducted, using development envelopes from land use concepts approved as part of the Downtown Sudbury Plan. This plan would include triggers for new or improved infrastructure and servicing, funding strategies, and performance targets. It is anticipated that a City-wide water and wastewater master plan will be initiated in 2011.