Chinatown Economic Development Plan
唐人街的經濟發展計劃

City of Edmonton

AECOM

VRBANICS

May 04, 2016

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Revision history

Revision #	Date	Revised By:	Revision Description
1	5/24/2016	AECOM	Edits from City of Edmonton
2	5/27/2016	AECOM	Edits from City of Edmonton
xxxxx	xxxxx	xxxxx	xxxxx

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May 4, 2016

Claudia Wong - Rusnak
City of Edmonton
12th Floor, 10250-101 St NW
Edmonton AB T5J 3P4

Dear Claudia,

RE: Chinatown Economic Plan

We are pleased to provide you with the final Chinatown Economic Development Plan Report. This summarizes AECOM and Urbanics efforts from November 2015-May 2016 which includes our review of economic market conditions, best practices, strategy development, and outlines a path for plan implementation.

Sincerely,
AECOM Canada Ltd.

Courtney Gosselin, MCIP
Project Manager
Courtney.Gosselin@aecom.com

Quality Information

Report Prepared By: _____ Stamp

Courtney Gosselin, MCIP, RPP
Manager, Design, Planning + Economics

Report Reviewed By: _____

Linda Cheu
Vice-President of Economics

1. EXECUTIVE SUMMARY

1.1. Executive Summary

As North America's largest most northerly Chinatown, Edmonton's Chinatown shares a similar history and pattern of development, growth, decline and renewal. Chinatown established initially in response to prejudicial policies and transitioning into a thriving neighbourhood, serving the daily needs for goods and services in the Asian community. Chinatown has a strong history of cultural investment in preservation and boasts a vibrant business and entrepreneurial spirit serving the needs of the community and residents of Edmonton for more than a century.

Chinatown is now at a junction for continued growth. Chinatown is poised to capture and capitalize on the strengths of its residents and business community, its unique fare and retail offerings within Edmonton, and its proximity to downtown and adjacent large redevelopment sites. However, given some of the current challenges in the community, primarily stemming from safety and the concentration of social agencies operating in the vicinity, compounded by the spatial dispersed commerce and culture, has had a constraining effect on Chinatown's ability to retain, attract and grow. In response to this, the City, in collaboration with the community, have recognized the challenges and the need for a holistic plan for Chinatown and its future growth. The first step of this process has been to prepare a Chinatown Economic Development Plan.

The Chinatown Economic Development Plan Report aims to create a basis for strategy development that is driven by a thorough understanding of the market context, economic issues and identifying elements of what makes Chinatown districts successful. It includes the following elements:

- Market Conditions Assessment
- Analysis of the Current State of Chinatown
- Analysis of Best Practices from other Successful Chinatowns
- Strategies and Recommendations to Address Challenges and Implementation

Through conversations with the community, an economic market analysis, review of best practices in North American Chinatown's, five overarching strategies and associated recommendations have been developed. Strategies focus on:

a. **Establishment of an Economic Development Zone –** the community has been grappling with the definition and scale of Chinatown for many years, given the spatial spread between Chinatown South and Chinatown North. The establishment of a defined and smaller boundary that initially focusses efforts on Chinatown North, will help in targeting resources, investments and implementation in the area, which in turn will create a stronger core and identity for Chinatown, making it more attractive to future visitors and residents.

b. **Improving Physical Assets –** There are numerous physical assets in Chinatown, that contribute to the overall Chinatown experience and environment. These include but are not limited to Chinese gates (Harbin and 107th), gardens and parks (Mary Burlie and Louise McKinney), 97th Street and Bridge (as the focal point for retail and gateway into Chinatown), historical and pedestrian-orientated buildings.

c. **Focus on Safety and Security –** A reoccurring challenge raised by the community was the experience with the safety issues in the area and its impact on daily business operations, visitor perceptions, and the impact on tourism and promotion of the area. Without strong interventions to resolve challenges in relation to the cluster and presence of large social agencies and their clients, Chinatown will likely continue to see a disinvestment and perception issues.

d. **Creation of a Destination –** Chinatown's are destinations across North American, not only for tourists, but city locals as well. Visitors come for the unique cuisine and dining, but also to wander in and out of trinket stores, grocery markets and other various retail options. Additionally, Chinatowns are typically defined by unique characteristics that drive tourism such as narrow alleys, gardens, cultural centers and art galleries. Edmonton's Chinatown requires a broader strategy and approach to defining itself as a destination within Edmonton.

e. **Models for Implementation -** A plan is just plan unless it supported by solid framework for leadership, staff and volunteer resourcing, and has financial stability. There are likely several potential models to support the implementation of the Chinatown Economic Development Plan, however, it will be important to first establish a Chinatown Economic Development working group comprised of traditional and non-traditional Chinatown stakeholders, in efforts to kick off discussions regarding the implementation of the recommendations laid out in this plan.

Thank you to all the participants who contributed to the development of Chinatown Economic Development Plan, with special thanks to the following groups:

- Chinatown Business Improvement Area
- Chinese Benevolent Association
- Edmonton Chinese Young Leaders Council
- Chinese Elder's Mansion
- Edmonton Chinese Multi-Cultural Center
- Chinese Freemason Society
- Downtown Business Association
- McCauley Community League
- Boyle Street Community League
- Chinese Garden Society
- Edmonton Our Father's House
- Dub Architecture
- Edmonton Economic Development Corporation
- Raimond Fung Architecture
- Hyatt Hotel
- Yorkton Management Group
- City of Edmonton

Cities have the capability of providing something for ***everybody***.

2. INTRODUCTION

2.1. Introduction

This report provides an interim update on progress for the Chinatown Economic Development Plan, which forms Phase 1 of the overall Chinatown Plan. It provides a summary of preliminary economic research and background information collected to date, together with a summary of the public engagement process supporting the plan.

2.1.1. Project Context

A series of City-led plans for renewal and revitalization for Chinatown have been developed over the past 30 years. Many of these previous plans echo the similar challenges faced in the community today, such as a large concentration of social agencies, perception as an unsafe area, increase vacancy and decreased private investment. Initiatives dating back to 1978 include planning efforts such as:

- 1978 - The Future of Chinatown – Downtown Working Paper #1;
- 1980 – Revised Chinatown Plan;
- 2009 – Quarters Downtown Area Redevelopment Plan – The Way we Grow;
- 2010 – McCauley Area Revitalization
- 2012 – McCauley Area Urban Design Plan & Streetscape Improvements;
- 2014- The Quarter's Downtown Urban Design Plan

The culmination of urban design streetscape initiatives throughout north and south Chinatown, The Quarters Redevelopment Plan and discussions around the new Valley Line LRT expansion on Harbin Road, as well as the potential temporary removal/relocation of the Chinese gate on 97th and Harbin Road, and the desire to resolve the fractured geography of Chinatown, sparked a renewed interest and effort in creating a broader strategy for Chinatown.

On September 2, 2014, Executive Committee was presented with a report that outlined a strategic roadmap to create and implement a complete Chinatown Plan. At that meeting, Committee directed Administration to advance steps to proceed to develop a Chinatown Plan. This plan considers both areas of Chinatown to determine viability and to develop strategies to support a Chinatown which is both culturally diverse and economically sustainable. The focus of this plan is on action and implementation measures to ensure that real progress is made in ensuring long term growth for this vital area of the city.

The first component of this Plan, Phase 1, encompasses the preparation of an Economic Development Plan. This plan will be used to inform the direction of Phase 2, which will identify Economic Programming and an Urban Interface Plan, before proceeding to develop the final Chinatown Plan or Strategy document. The last phase in plan development, Phase 3, will be entirely focused on implementation activities.

2.1.2. Project Approach

The approach for the development of an Economic Development Plan is based on creating strategies that are driven by a thorough understanding of the market context, economic issues, and what makes Chinatown districts successful.

The Economic Development Plan includes the following elements:

- A market conditions assessment for Chinatown based on its unique cultural character, proximity to Downtown, nearby transformative projects and surrounding neighbourhoods.
- An analysis of the current state of Chinatown and key influences that impact economic growth opportunities.
- An analysis of successful strategies in other Chinatowns around North America.
- The development of strategies and recommendations to address challenges and provide pragmatic recommendations that include implementation plans.

The following page outlines the City of Edmonton's Chinatown Project Schedule.

PHASE 1

Phase 1 — **Economic Development Plan** ★

PHASE 2

Phase 2A — **Economic Programming**

Phase 2B — **Urban Interface Plan**

Phase 2C — **Chinatown Plan**

Public Consultation

PHASE 3

Phase 3A — **Pre-Implementation**

Phase 3B — **Implementation**
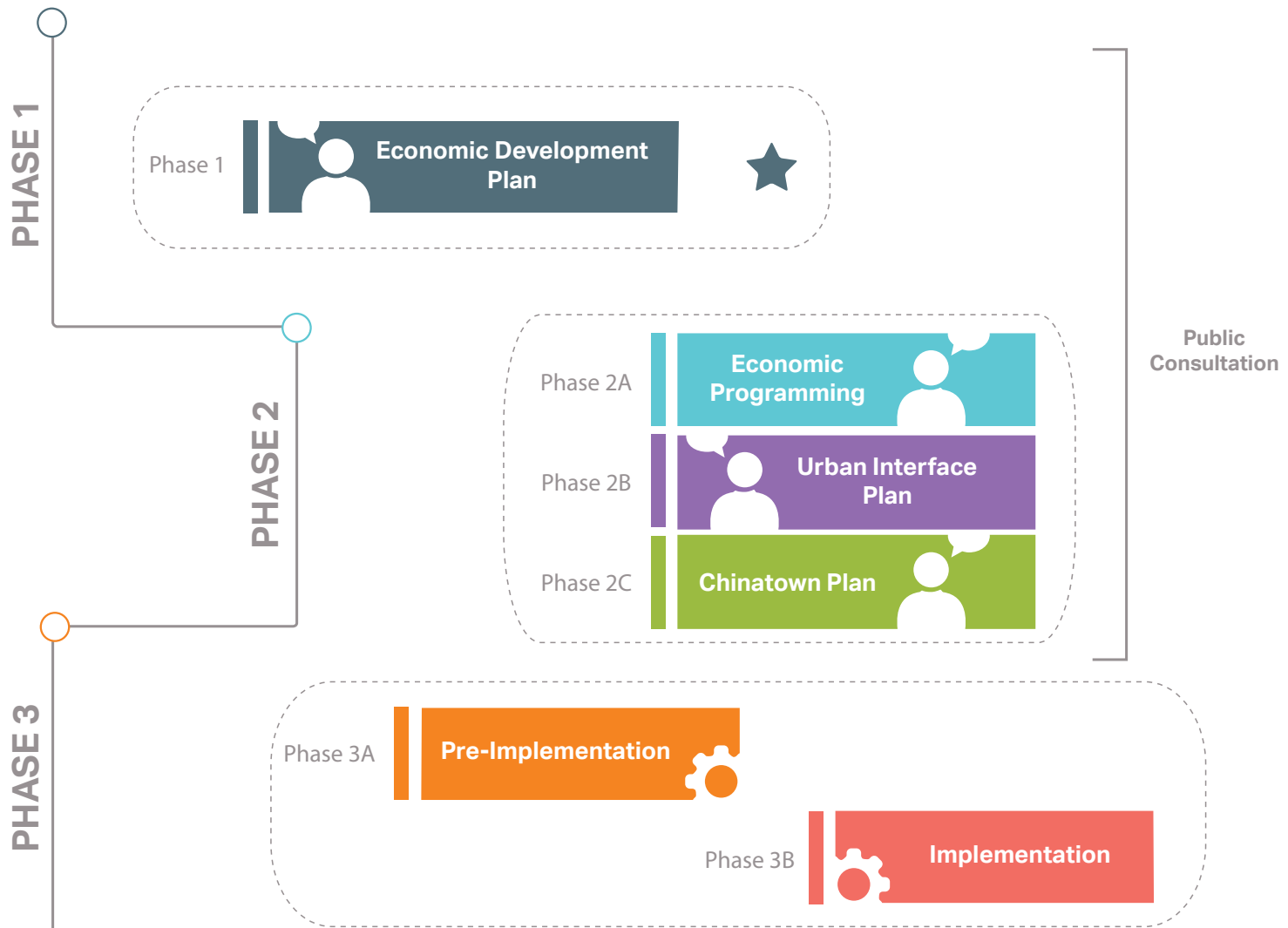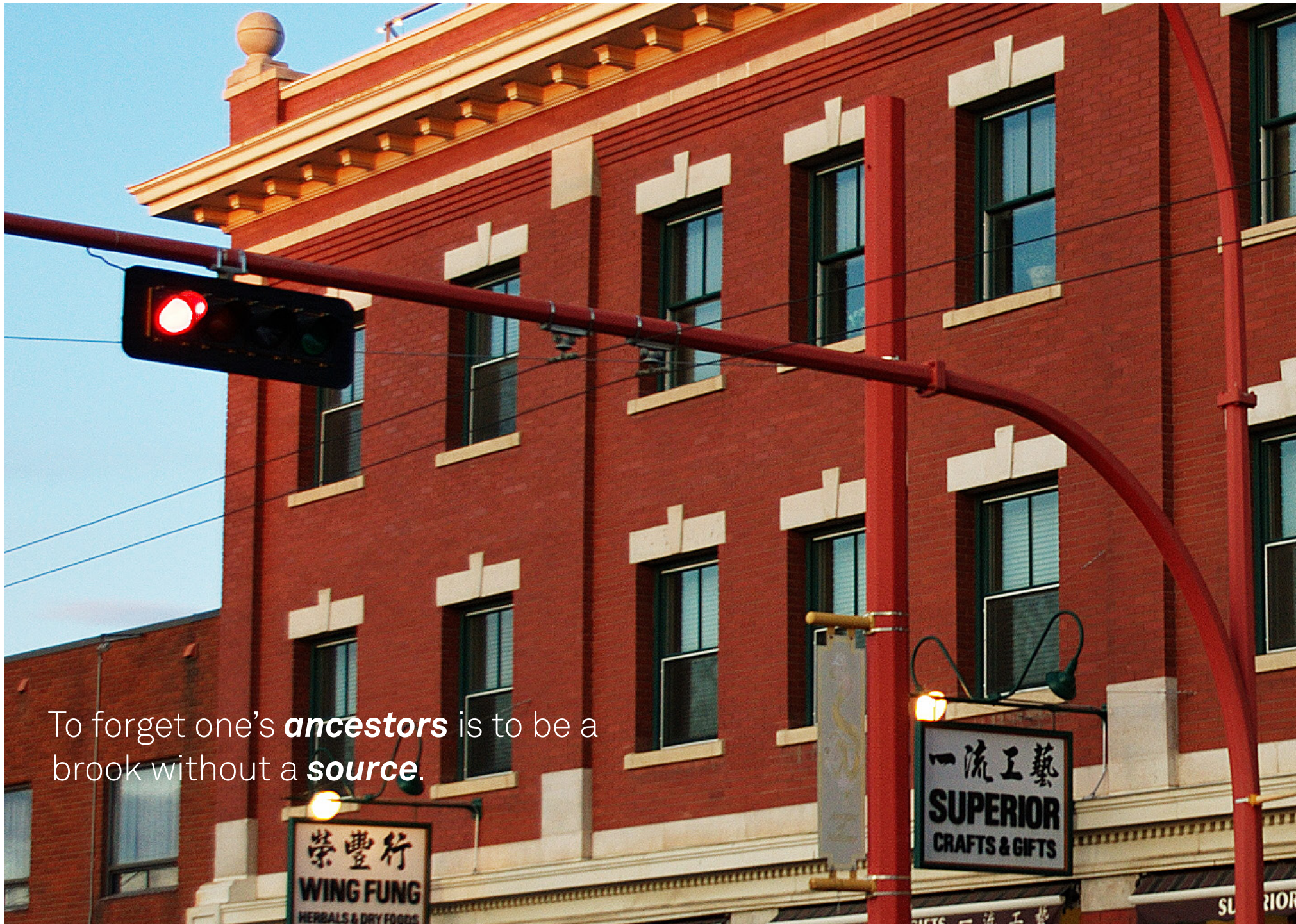
To forget one's *ancestors* is to be a brook without a *source*.

3. HISTORY

3.1. Historical Context

Edmonton's Chinatown was established over 100 years ago in the area around Jasper Avenue and 97 Street in the community of Boyle Street. Its history and development follows a similar growth and decline pattern to most North American Chinatowns, whereby immigrants arriving from China to Canada as labourers for the Canadian Pacific Railway, faced with prejudicial government policies, concentrated settlement in neighbourhoods adjacent or nearby the downtown core.

The emergence of Edmonton's Chinatown, and other Chinatowns across North American, is a response to the confining nature of the Exclusive Laws and a response by the Chinese community to provide housing, social and cultural support, as well as provide daily goods and services for the Chinese community.

Early Years

During the post-second world war period, Edmonton's Chinatown became a cohesive, self-sufficient community, providing services such as housing, employment, and social and cultural activities. Associations emerged to function in the capacity of welfare and protective agencies with leaders of these associations acting in turn as mediators between the Chinese and outside community. These associations still remain active in Edmonton's Chinese community today, and include associations such as the Chinese Benevolent Association, Gee Association, Albert Kaiping District Association, Tai Shan Society of Edmonton, Wong Benevolent Society, Chinese Freemasons Society, and so on. During the 1940's to 1960's, Chinatown experienced periods of growth and decline resulting from changing immigration policies and political events triggering emigration from China.

The slow recovery of Chinatown gained momentum in the 60s when families were permitted to immigrate, bringing more diverse Chinese people from Hong Kong, Taiwan, Singapore and Malaysia. Immigration continued throughout the 70's and 80's, and the Vietnamese and Chinese-Vietnamese population grew rapidly after 1979 when Canada agreed to accept refugees from Indochina. The new wave of immigrants began establishing a few blocks further north of the Canadian National rail bridge. This led the expansion of a commercial district and resulted in the infusion of many new Chinese businesses (now commonly known as "Chinatown North") to the area what would traditionally have been businesses owned and operated to serve the Ukrainian, Italian, and Eastern European communities.

1970-1980's

In 1977, the Chinese Elders' Mansion was constructed on 102 Avenue between 95 and 96 Streets. The Chinese Multicultural Centre added to the area when it was completed in 1985. Then in 1987, a Chinese gate spanning 102 Avenue at 97 Street was constructed to symbolize friendship with Edmonton's sister city, Harbin, China.

The confirmation that Canada Place would be constructed at the northwest intersection of Jasper Avenue and 97 Street triggered the need to work towards a new Chinatown in the late 1970s. The Chinese community and the City of Edmonton worked to create a new Chinatown that would see Chinatown develop east of 97 Street along 102 Avenue. A Chinatown Plan was contemplated in 1977 which culminated in the 1979 Chinatown Plan that focused on the area around 102 Avenue, between 95 and 97 Streets (See Figure 1). Since 1979, further study and development of the area (currently referred to as "Chinatown South") continued and significant investments to realize the Plan were carried out. These include the Chinese Elders Mansion in in 1977, a second tower completed in 1991, the Chinese Multicultural Centre in 1985, several family associations, and the arrival of the Harbin Gate in 1987.

1990-2000's

Over time, the development in the planned Chinatown did not fully materialize and the businesses that established in the north created a concentration of ethnic commercial entities. This gave way to the emergence of two separate and distinct areas identifying as Chinatown Edmonton today.

Additionally, over time, daily goods and services that had traditionally only been available in Chinatown, such as grocery, herbal medicines and services such as acupuncture, began to suburbanize, serving the Chinese community in various sectors of Edmonton. With the introduction of major supermarkets such as T&T Market (Northgate Center, West Edmonton Mall, 34 Ave NW), Korean Central Market and other large Asian supermarkets locating on the fringe of Edmonton, demand for Chinatown services decreased.

The cumulative effect of the development of two distinct and separate areas of Chinatown, one cultural (south) and the other commercial (north), declining consumer base and demand for Chinatown services, and the perpetuating perception of Chinatown as an unsafe place to visit has resulted in the need for a long term Chinatown economic strategy. Its changing character and evolving identity with increasing immigration from African, Korean, and Vietnamese populations also presents a challenge to what has traditionally been a district distinctly focused on providing goods, services, and community support to Chinese immigrants.
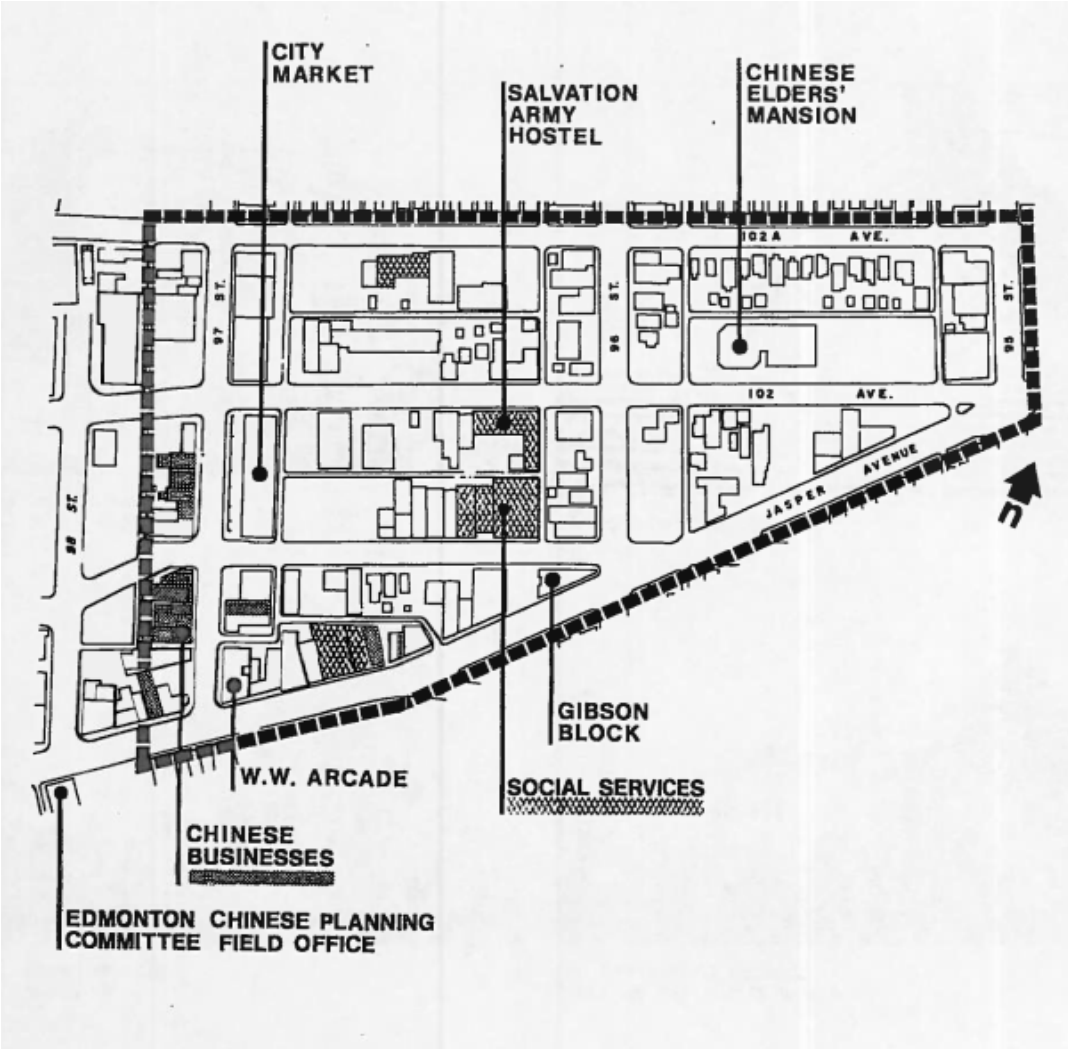
Figure 1: The Future of Chinatown (1978) Original Study Area

Civic engagement is key to success in urban *revitalization* and achieving and sustaining economic and social wealth.

4. PUBLIC CONSULTATION

4.1. Community Consultation Process

4.1.1. Overview

In order to identify all possible actions towards cultivating Edmonton's Chinatown into a sustainable and vibrant cultural destination, the consulting team with the City of Edmonton adopted an integrated approach to public consultation with four separate components as follows:

- Public Kick-Off/Ideas Workshop – December 9, 2015
- Economic Research Interviews – December 8-10, 2015 Personal interviews, multi-stakeholder meetings with BRZ and CBA
- Ground Level Retail Surveys – March 2016 One-to-One with Business Operators (Various targeted areas)
- Workshop #2: Market Findings & Strategies – April 21, 2016

Consultation Stakeholders

Engaged stakeholders include, but are not limited to:

- Cultural Community – Chinese Benevolent Association, Freemasons, Edmonton Chinatown Multi-cultural Centre, and a number of other family and cultural associations
- Business Community – Business owners, business improvement area
- Development Community – Local development investors, property owners, and realtors
- Orders of Government – Representatives of City Council,

Member of Parliament, Member of the Legislative Assembly
- Additional Community Stakeholders – Community leagues, tourism, youth groups, tourists.

City of Edmonton Stakeholders

In addition to the public feedback and engagement, various City departments from planning to transportation were engaged during this process to assess Chinatown's Economic Development Plan in relation to broader City-wide initiatives, goals, and surrounding neighbourhood plans to ensure Chinatown's success and future implementation is woven into future efforts by the City of Edmonton.

Workshop #1: Public Kick-Off Meeting & Visioning

On December 9, 2015, the City of Edmonton hosted a workshop to engage the community in a conversation regarding Edmonton's Chinatown Economic Development. The workshop was the first of two community workshops as part of an economic development planning effort and was led by AECOM, assisted by Urbanics. The purpose of the workshop was to develop an understanding and context for community perspectives related to strengths, challenges, and opportunities in Edmonton Chinatown.

Workshop participants were asked to answer four major questions:

a. What are the strengths and opportunities in Edmonton Chinatown?

b. What are the biggest challenges / weaknesses facing Edmonton Chinatown?

c. What does a successful future Edmonton Chinatown look like? What would you like to see in Edmonton Chinatown?

d. What other ideas do you have? What other issues are important? What do we need to know?

Feedback Response Summary

A summary of responses to the four questions are as follows:

a. What are the strengths and opportunities of Edmonton Chinatown?

- Chinatown has a rich and historical significance in Edmonton, including unique cultural attributes as well as historic buildings.
- Chinatown is very well-located. Its proximity to downtown and large redevelopment projects such as the Royal Alberta Museum, Ice District and Galleria projects are an advantage for Chinatown.
- Chinatown provides an authentic and unique shopping and dining experience in Edmonton. It offers a range of unique restaurants and supermarkets.
- The Chinatown community has many different organizations who are actively involved with numerous community leaders.
- Chinatown still supports new international immigrants moving to Edmonton.
- There is opportunity for redevelopment and plenty of land available for new projects.

b. What are the biggest challenges/weakness facing Edmonton Chinatown?

- The concentration of social agencies serving the homeless creates numerous challenges for Chinatown, including:
  - A perception that Chinatown is not safe, leading to limited visitation and pedestrian activity in the evenings. This negatively impacts business revenue potential.
  - Significant cleanliness and maintenance issues, often directly affecting individual businesses. Business costs are higher as a result of the increased need for cleaning and maintenance due to the transient population.
  - There have been challenges in communicating with senior leadership at social service agencies to address problems in a proactive manner.
- Limited residential population
- Lack of visibility & wayfinding from downtown
- Absence of a major cultural / heritage attraction and/or high quality central community plaza or indoor gathering space for major cultural events and programming
- Limited activities for younger generation
- Physical fragmentation
- Parking availability
- Limited redevelopment activity and turnover of properties; abundance of vacant lots; land speculation

c+d. What does a successful Chinatown look like? What would you like to see in Chinatown? Additional Ideas and Issues?

- Chinatown is a destination for both residents and tourists
- Welcoming and safe environment
- Preservation of culture and history remain central focus of district
- Urban design that celebrates the culture
- Cultural attraction such as a museum and facility for gatherings and programming
- Increased cultural programming and events on a regular basis
- Increased residential population
- Attractive to youth / young professional population through either increased nightlife, art, or retail
- Additional tourism and promotion, including a well-developed map for tourists, additional tourism products and experiences, better marketing of existing experiences
- Consider a development corporation or land bank for redevelopment
- Consider integration of the cultural and business groups

Economic Research Interviews

A series of one-on-one and small group stakeholder interviews were held in Edmonton in early December, 2015. The interviews included various representatives from the Chinatown and neighbouring Business Revitalization Zones (BRZ) organizations, City staff, community support workers, local developers, property owners, architects and others with interests in the long term future of Chinatown. Conversations were an informal, focused dialog and participants were asked for their input on the main issues and opportunities in the area, leadership and roles, and potential actions to support revitalization efforts in Chinatown.

The major challenges which emerged from the interviews were as follows:

- Social Issues – homelessness, poverty, social agency clustering
- Safety & Security – the low perception of safety in the area for residents and visitors
- Inter-Agency Cooperation– social agency clustering and coordination challenges
- Boundary Definition – defined focus area required, Chinatown North and South not united

The following opportunities were identified during interviews as follows:

- Promotion of Food/Culture in Chinatown
- Engagement of Youth in Planning Efforts
- Increased Tours/Events in area
- Increase and focus on attracting new developments in area

Ground Floor Retail Surveys

The ground floor retail surveys were conducted to evaluate the Chinatown retail business environment, customer characteristics, trends in business performance, real estate considerations and major issues facing the retail businesses in Edmonton's Chinatown. The consulting team engaged with business owners spatially dispersed across the Chinatown, from Chinatown North along 97th to 101 Streets and Chinatown South 102 Avenue NW to gain a broader sense of the retailing in each of these sub retail areas.

Discussions with these groups identified a number of major themes and concerns;

- Social Agency Concentration/Perception of Safety
- No major attraction/cultural activity draws
- Chinatown is in great proximity to capture development & density
- Population density is low to support district aspirations
- Sustainability and Longevity– youth involvement, diversified retailing, night life

Median Square Footage per Business	1,400
Median Net Monthly Rent	$2,700
% Owner Occupied	34%
Monthly Rent Per Sq. Ft.	$1.93

Survey Results: Types of Businesses in Chinatown

Chinatown is serviced by a broad range of different businesses. On the adjacent Figure, other* businesses comprise the following:

- Massage therapy
- Vehicle rental
- Cell phone store
- Food process
- Liquor & Convenience Store
- Newspaper publisher
- Travel agency
- Record Store
- Restaurant Equipment Sales

Types of Business

- Restaurant & Bar
- Other*
- Produce / Grocery / Meat Store
- Herbal / Dried Goods
- Personal or Business Service
- Jewelry Store
- Gift Shop
- Electronics Store
- Drug Store
- Stationary / Book Store
- Furnishing & Appliance Store

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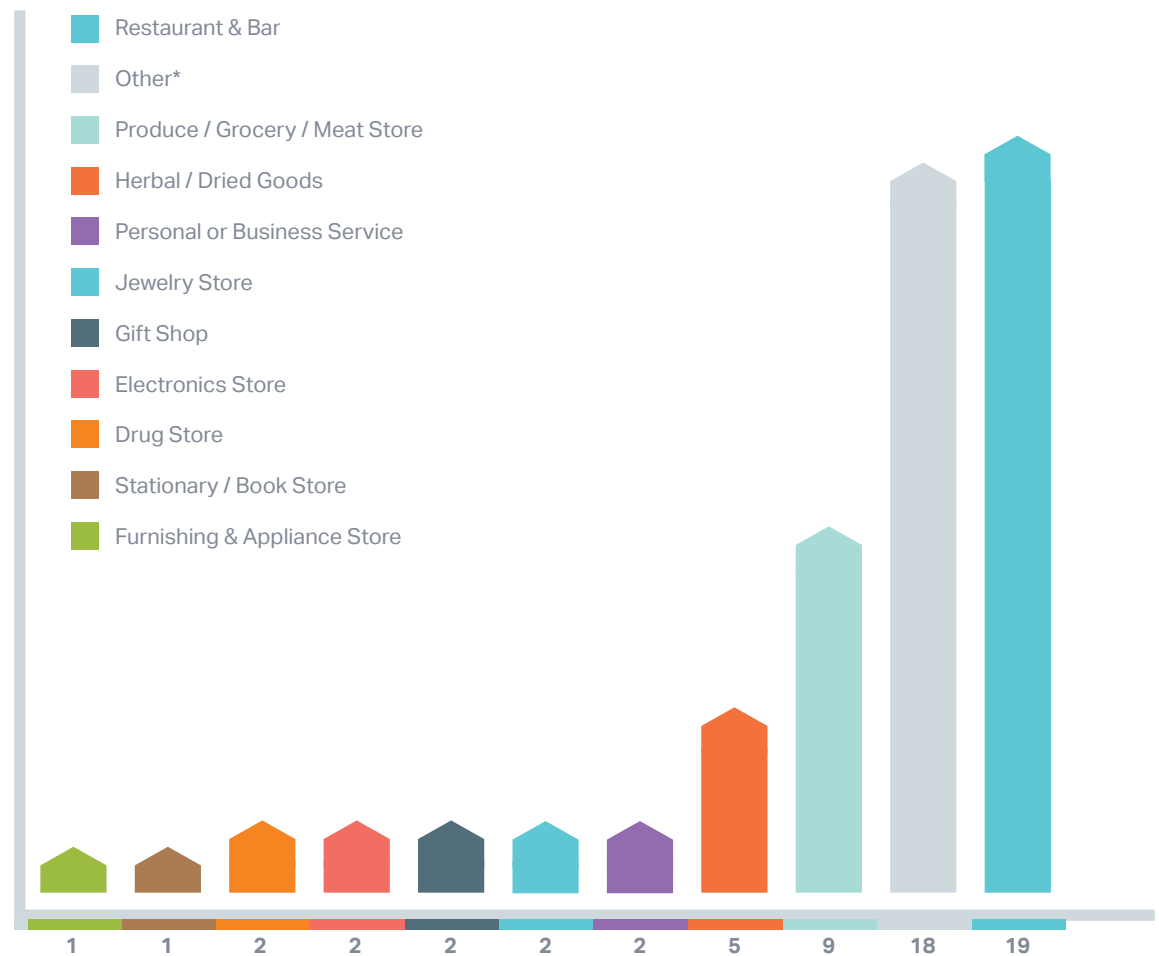
Figure 2: Types of Business

Estimate of Customer Base

- The majority of respondents said that at least a portion, if not 100%, of their customer base is the local Chinatown population.

- 19 respondents said their customer base comes from across the City of Edmonton.

- Only 6 businesses noted tourists as being part of their customer base and several noted that tourists only come during the summer months.

- On average, the restaurants that serve lunch benefit the most from the local and Downtown Edmonton employee base.

Due to safety concerns in the area it is not surprising that only 12% of businesses are open in the late evening, however, many respondents expressed a desire for a night market, late night entertainment and bars to activate the area in the late evening.

Years in Operation

- Less than 5 years
- 10-15 Years
- 5-10 Years
- More than 15 Years

24%
17%
25%
33%

Business Hours

- Daytime, Evening & Late Evening
- Evening & Late Evening
- Daytime
- Daytime & Evening

10%
2%
44%
44%
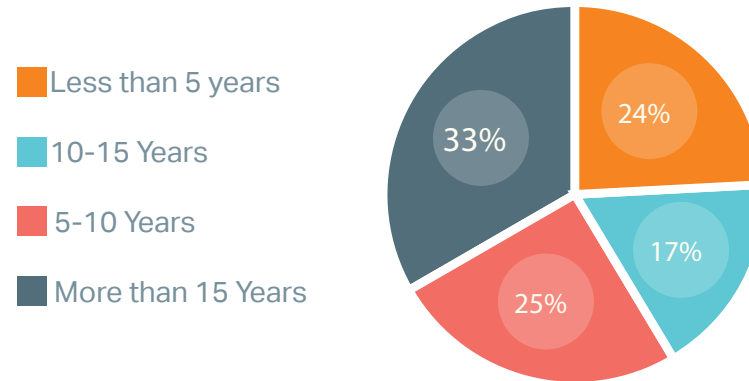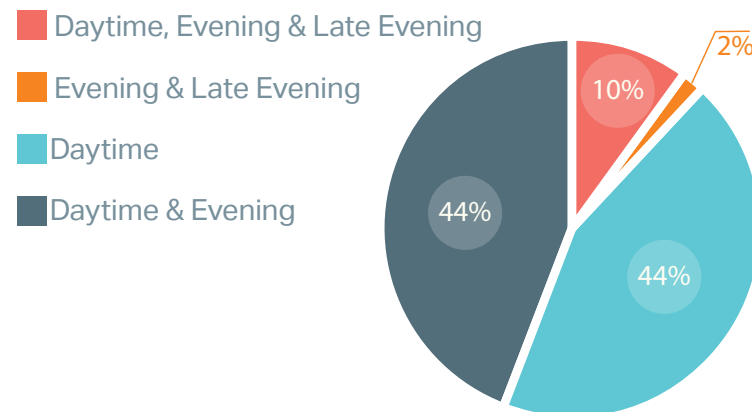
Survey Results: Reasons for selecting Chinatown

It is important to understand why businesses have chosen Chinatown. Businesses responses are illustrated by the graphic adjacent:

Reason for Locating in Chinatown

- Low Rent / Favorable Lease Terms
- Character of Space
- Other
- Business Reasons

| 4 | 4 | 13 | 45 |
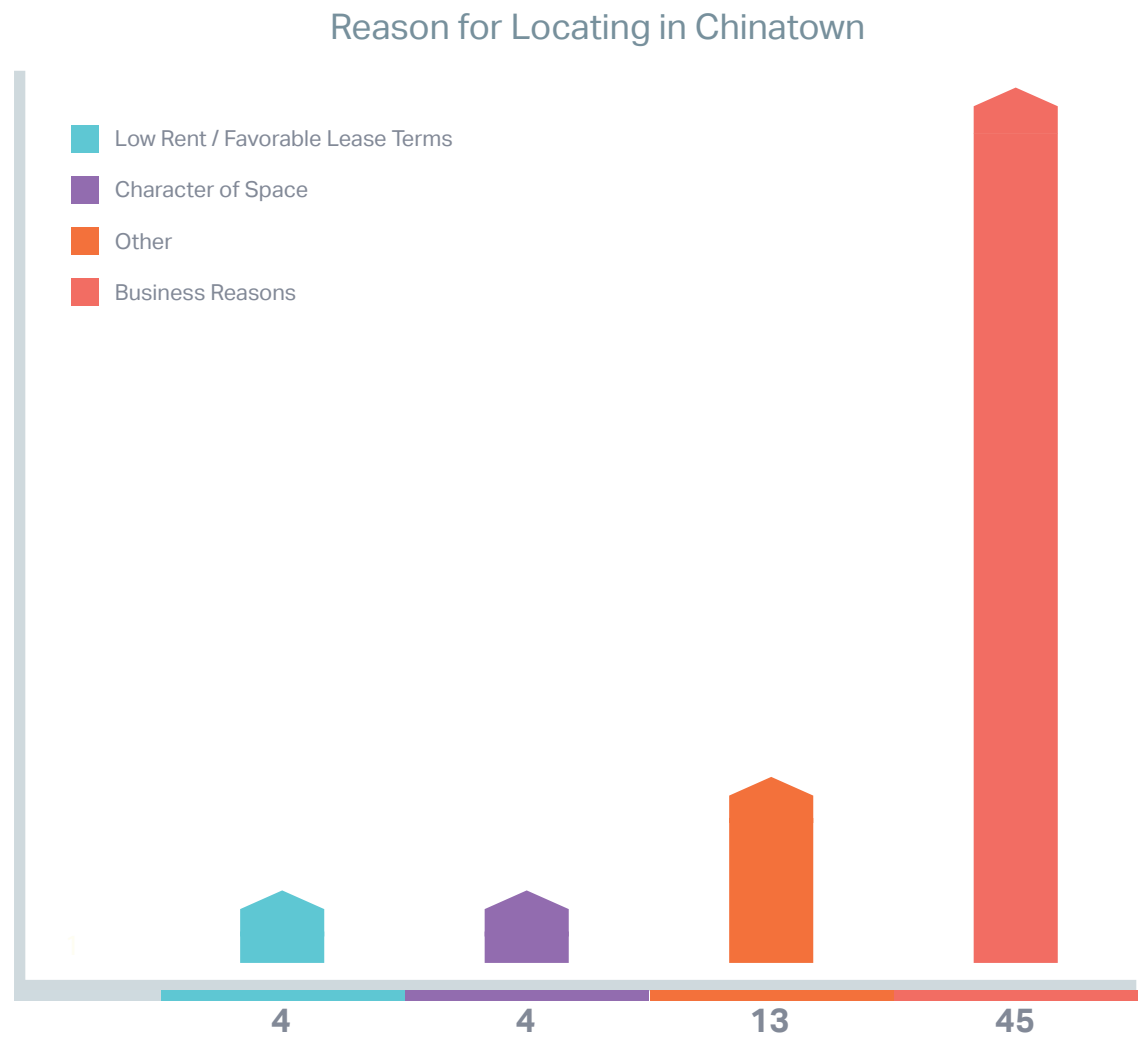
Figure 3: Reasons for Locating in Chinatown

Survey Results: Square Footage, Rent & Employment

- Total Persons Employed: 267
- Average number of employees per business: 4.5

Survey Results: Business Revenue

- Business in Chinatown has been stagnant or poor, with 87% of respondents reporting that business has either stayed the same or decreased in the last few years.

Changes in Business Revenue

Legend:
- Increased Substantially
- Increased Modestly
- Stayed about the Same
- Decreased Modestly
- Decreased Substantially

2%
11%
30%
35%
22%

Full Time v. Part Time

Legend:
- Full Time Employee
- Part Time Employee

34%
66%
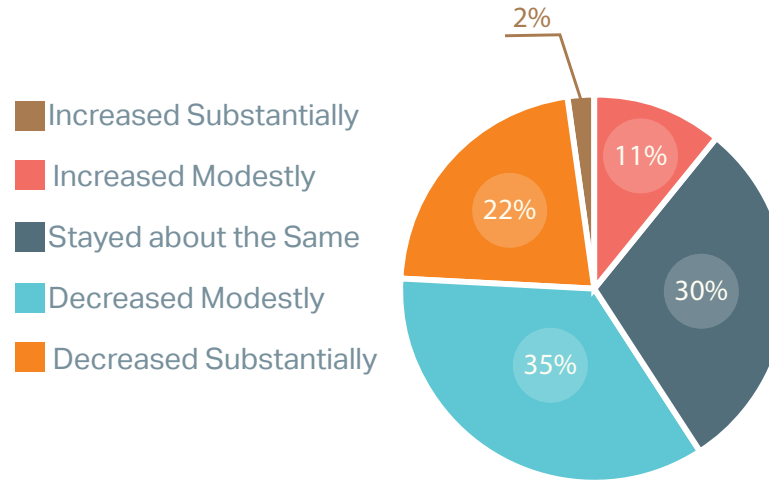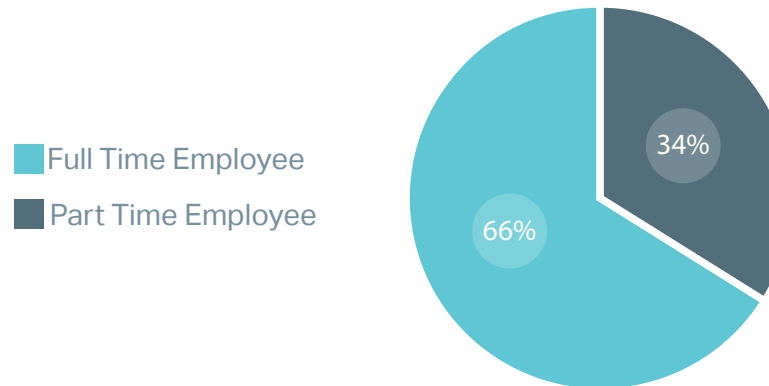
Survey Results: Business Environment

The issue of safety was identified by those surveyed as being an important component to establishing a competitive business environment in Chinatown. Key safety concerns and barriers to business growth are broadly characterized as the following:

- Safety problems in alleys
- Large homeless populations detracts from business
- Improve the urban environment
- Regular street clean-up

Business Factors that Create a Competitive Environment

Legend:
- Sense of Safety and Security
- Proximity to Public Transit
- Customer Parking
- Being in a Ground Floor Space
- More Attractions
- Heritage Environment

| 1 | 3 | 6 | 34 | 41 | 51 |
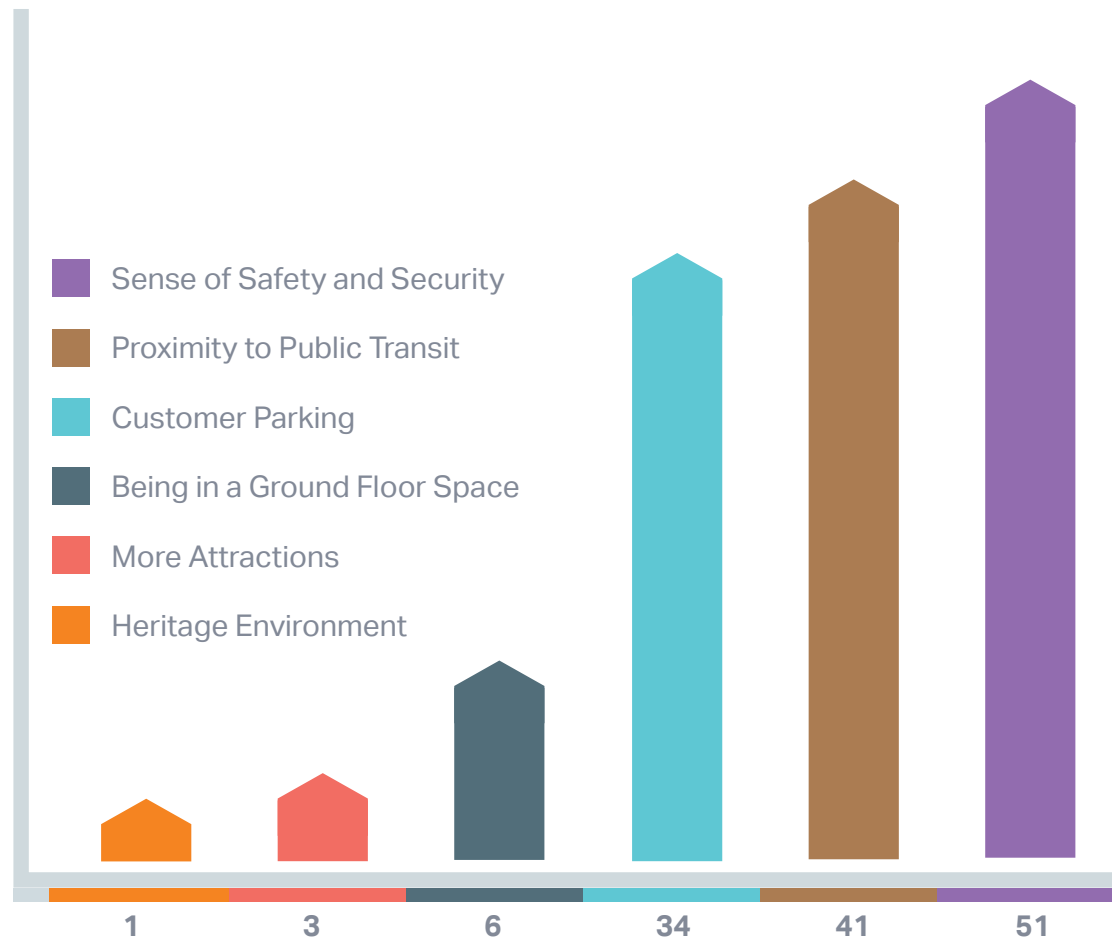
Figure 4: Business Factors that Create a Competitive Environment

Survey Results: Retail that is missing from Chinatown?
- Clothing boutique
- Family doctor with Mandarin/Catonese skills
- Supermarket
- Post Office
- Coffee shop
- Greater variety of restaurants (other cuisines besides Chinese & Vietnamese)
- Book store

Survey Results: Retail Features that are too numerous in Chinatown?
- Restaurants (most common response)
- Chinese medicine, herbal shops
- Hair stylists
- Empty parking lots
- Gift shops
- Restaurant arcades
- Optometrists

Workshop #2: Market Findings & Strategy Session

On April 21, 2016, the City of Edmonton hosted a workshop to engage the community in a conversation regarding Edmonton's Chinatown Economic Development. The workshop was the second of two community workshops as part of an economic development planning effort and was led by AECOM, assisted by Urbanics. The purpose of the workshop was to engage in a community dialog regarding proposed strategies and implementation models that will form the basis of action for the Chinatown Economic Development Plan and introduce the idea of the community as an Economic Zone.

A number of strategy topics were posed to community to discuss collectively in small groups. Participants were asked to move from table to table as to cover the four broader strategies proposed. This is a summary of their feedback.

Workshop participants were asked to engage in a conversation about the following four broad strategies and their role as it related to its implementation in the future as related to:

a. Chinatown as a Destination
b. Physical Assets
c. Safety and Security
d. Implementation Models

Chinatown as a Destination

Suggested Projects and Initiatives	
Branding and marketing (top priority)	Attract private investment
Urban design (ie. street lamps)	Create a gathering place for community
Paint mural on RAM	Redevelop Remand Center
Define connection along 97th Street from North to South	Attract start up businesses
Harbin gate relocation	Public washroom

Physical Assets

Suggested Projects and Initiatives		
97th Street and Jasper – relocation Harbin gate	Government building facades are sterile on 97th - need more street activation/ground floor business	New anchor destinations required
Social agencies buildings need façade improvements – not friendly, no queuing areas for clients	Add busking locations (i.e. Vietnamese Lantern at 107th & 97th)	101 Street need improvement – currently not walkable, gaps in buildings, traffic calming
Mural on RAM	Preserve heritage buildings - historical buildings tell the story of Chinatown	Naming committee – rename streets (i.e. Harbin Rd)
Street murals as wayfinding element between North and South along 97th	Food tours to promote the area	Design competitions for architects/artists/urban design.

Safety and Security

Suggested Projects and Initiatives		
Drop in center (i.e. Calgary model)	Foot & bike patrols	Increase affordable housing across the City
Shelters should retain clients in the morning, clients not on street	Increased lighting	Centralize/cluster social agencies
Social agencies near Casino and Ice district is a huge detractor to tourisms/ visitors walking to Chinatown	Wellness center	Redesign Mary Burlie Park
More parking	Night markets	Clean up 97th Street bridge

Implementation Models

Suggested Projects and Initiatives		
Formalize group with kick off meeting	Engage broader Asian community, not only Chinese	Ongoing process – no start and finish dates
Group should include: EPS, developers (local and abroad), social agencies, merchants, cultural groups	Create a community development corporation	Education and promotion of Chinatown and its future direction
City to help lead group until capacity is built	Support group with linguist – English to Chinese	Participation from broader Edmonton business community
Engage Chinese groups within broader Edmonton (i.e. Confucius Center.) Engage tourism agencies, hotels.	Overcome ambiguous leadership, roles and responsibilities need to be defined	Ensure community leadership fragmentation does not occur

4.2. Summary of Consultation

Overall, feedback from the community focused on four central themes which informed the strategy development for this economic development plan and are illustrated in the adjacent graphic.

Chinatown as a Destination

- Attracts both residents and tourists
- More residents and housing
- Attractive to youth and young professionals
- Additional tourism and promotion materials
- Nighttime activities
- Signature restaurants
- Regular events and place to gather

Culture and Heritage are Foundation

- Preservation of culture and history is central focus of district
- Urban design celebrates culture and heritage and unifies Chinatown
- Cultural attraction such as a museum and public assembly space for gatherings
- Increased cultural programming and events on a regular basis

Safe and Active Environment

- Welcoming and safe environment for residents and tourists
- Businesses can operate in a secure environment that does not limit customer base or create external costs
- More residential development to active the streets
- Increased night time activities; Chinatown is active all the time

Economic Development is Integrated

- Different model or structure that allows for better coordination and for ability to garner financial resources and investment and adds capacity
- Better integration of cultural and business organizations needed

Innovation is an inexhaustible engine for economic development

5. ECONOMIC MARKET ANALYSIS

5.1. Site Analysis

5.1.1. Study Area

The study area for the Chinatown Plan can be disaggregated into two distinct areas: Chinatown North or "Commercial Chinatown" and Chinatown South or "Historic Chinatown". The study area also includes the Chinese Garden, located south of Jasper Avenue, within the Louise McKinney Riverfront Park (see Figure 5). The total study area is approximately 170 acres (68.7 hectares) with Chinatown North making up 101 acres (41 hectares), Chinatown South making up 67 acres (27 hectares) and the Chinese Garden making up 1.7 acres (0.7 hectares).

This study area boundary is a reflection of both the Chinatown Business Revitalization Zone (north) and the historical Chinatown (south), also including the Chinese Garden on the north bank of the North Saskatchewan river valley in Louise McKinney Park. For the purposes of this study, a boundary has been established to reflect parameters for future recommendations and strategies. However, given that this is an economic development plan, the market assessment includes an analysis of citywide and regional trends.
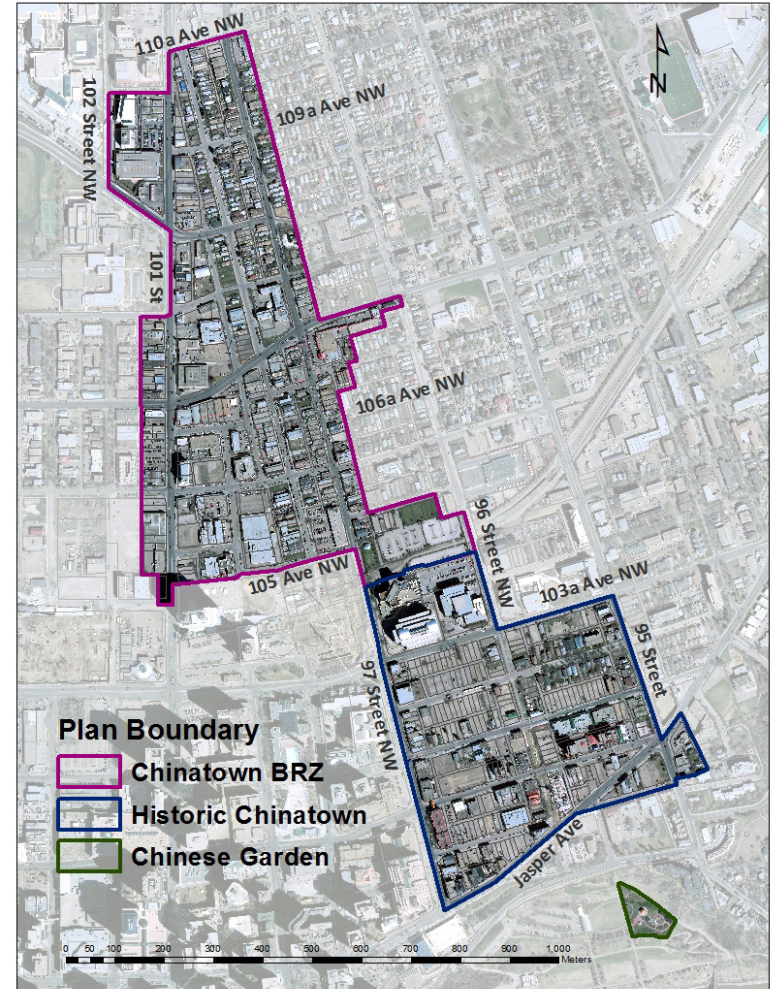
Figure 5: Location of Study Area

5.1.2. Surrounding Land Uses

There are a number of surrounding land uses that could have a significant impact on the future of Chinatown. These include, but are not limited to:

- **ICE District -** Phase 1 is well underway for the new 25 acre ICE District complex. The first phase features the new Rogers Place arena, Winter Garden (24,000 sq. ft. of public event space), the Edmonton Downtown Community Arena, the Edmonton Civic Tower (27 storey LEED Gold office tower), as well as the 60,000 sq. ft. Grand Villa Edmonton Casino, and the MacEwan LRT station. The second phase is expected to be developed from 2017 to 2020 and will feature a 50,000 sq. ft. public plaza, a 360 room four-star hotel with condominiums above, the 60 storey Stantec office tower, over 1,000 residential units, 270,000 sq. ft. of retail attractions, Cineplex VIP cinemas and a grocery store. The Ice District borders sections of Chinatown North, spanning from 101 Street to 104 Street and from 103 Avenue to 106 Avenue. In addition, an area of land north of Phase 1 and 2 has been earmarked for future development.

- **New Royal Alberta Museum -** The new Royal Alberta Museum (RAM) is currently being developed west of 97 Street and south of 105 Avenue. When complete, the museum will be the largest in Western Canada, with 419,000 sq. ft. of buildable area and over 82,000 sq. ft. of exhibition space. The museum is expected to open in late 2017 or early 2018.

- **The Quarters Downtown -** The Quarters Downtown is a city-led revitalization initiative located in the area of 97 Street to 92 Street and from 103A Avenue to the top of the river valley (approximately 100 acres or 40 hectares). The City of Edmonton has invested $56 million to improve infrastructure in the area and is actively seeking to redevelop a number of properties. The area currently houses some 2,400 residents; however it is expected to grow to accommodate up to 20,000 over the coming decades. Featured projects of the Quarters include the Armature and Boyle Renaissance, as well as the 13-storey Hyatt Hotel at 96 Street and Jasper Avenue. In addition, the 28-storey, 285 unit "The Corners" Residential Tower 1 (ON HOLD) at the intersection of Jasper Avenue and 95th Street is under development as is the Lodge Hotel and Brighton Block restoration and renovation which will house the Ukrainian Canadian Archives and Museum of Alberta. Further, the Artists Quarters, a new facility of 64 live/work studios for artists and arts organizations, has been proposed for 102A Avenue and 96 Street.

- **The Armature -** The Armature is a linear park corridor, currently under development, for 96 Street from 103A Avenue to Jasper Avenue. The Armature will include a new promenade with ample seating, mid-block "piazzas", and a granite paved plaza as well as new city park with a sunken lawn.

- **Boyle Renaissance -** The Boyle Renaissance project is a special planning area within the Quarters Downtown, located between 95 Street and 96 Street from 103A Avenue north to the LRT tracks. Boyle Renaissance is a city-led development to create a community of affordable and market housing opportunities. Phase I has been completed and includes the Melcor YMCA Village affordable housing units, and the Boyle Renaissance Plaza, which includes the new community centre and ample park space. Phase II has also been completed and includes the Renaissance Tower by the Métis Capital Housing Corporation, which includes 90 residential units that are senior-friendly and barrier free to accommodate seniors, people with disabilities and aboriginal people.

- **Lodge Hotel and Brighton Block** - Also under development is the Lodge Hotel and Brighton Block restoration and renovation which will eventually house the Ukrainian Canadian Archives and Museum of Alberta. Further, the Artists Quarters, a new facility of 64 live/work studies for artists and arts organizations, has been proposed for 102A Avenue and 96 Street.

- **McCauley Revitalization** - The McCauley Revitalization Strategy was approved by City Council in December, 2010. As of 2013, the City began a $10.5 million revitalization process. The process includes the creation of an overall safety plan, enhancements to Chinatown with banners, lighting and sidewalk decorations, improvements to 107A Avenue including pocket parks, improvements to Little Italy along 95 Street and developing plans for a multicultural tea house along 107A Ave.
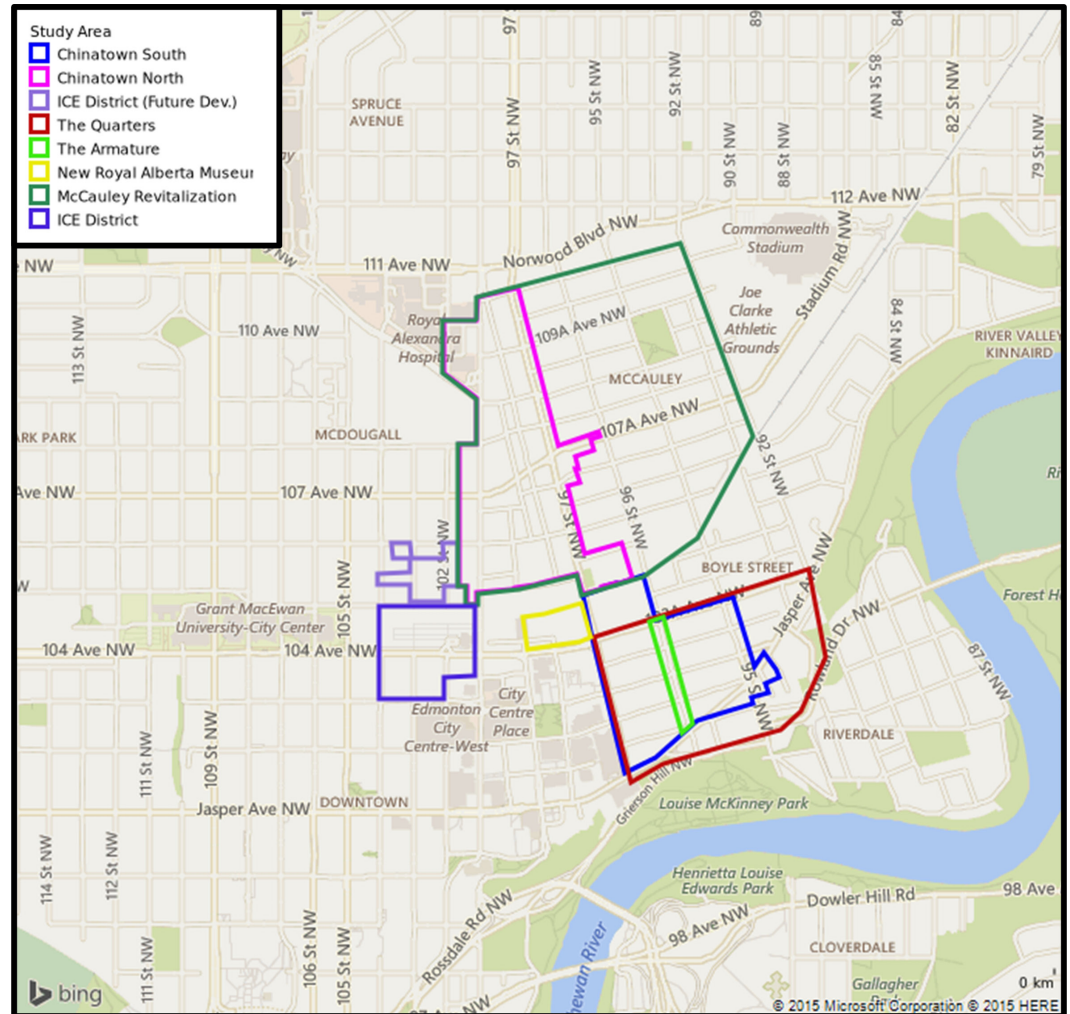
Figure 6: Edmonton Chinatown Surrounding Land

5.1.3. Access Considerations

Access considerations include the ability of pedestrians and vehicles to access the site or area. For vehicles there are several main thoroughfares running adjacent to or through the study area. Estimated 2015 average annual weekday traffic volumes are shown in Figure 7 adjacent. As indicated, some of the busiest areas within Chinatown North include the north-end of 97 St NW with 20,500 to 21,000 average annual weekday vehicles and 101 St NW with average volumes of 20,700 to 29,000. Going east-west, 107A Ave NW is the busiest street with 17,000 to 19,100 average annual vehicles. Chinatown South generally has much lower traffic volumes; the busiest streets being 103A Ave NW with 15,500 to 16,500 average annual vehicles, Jasper Ave with a volume of 17,600 and 95 St NW with 14,300 to 19,600 average annual traffic volumes.

The closest LRT station is Churchill, about 250 metres from the western border of Chinatown South and 800 metres from the southern border of Chinatown North. The Churchill LRT Station saw an average weekday service of 8,030 boardings and 7,560 alightings (on a typical fall day) The new Quarters LRT Station at 96 Street NW and 102 Avenue, anticipated to open around 2020, will allow for even greater access to Chinatown South.

Therefore, 97 Street NW and 101 Street NW represent important transportation corridors for both private vehicles and public buses. 102 Avenue NW is anticipated to become an increasingly important route for pedestrians and public transportation users as a result of the new Quarters LRT station.
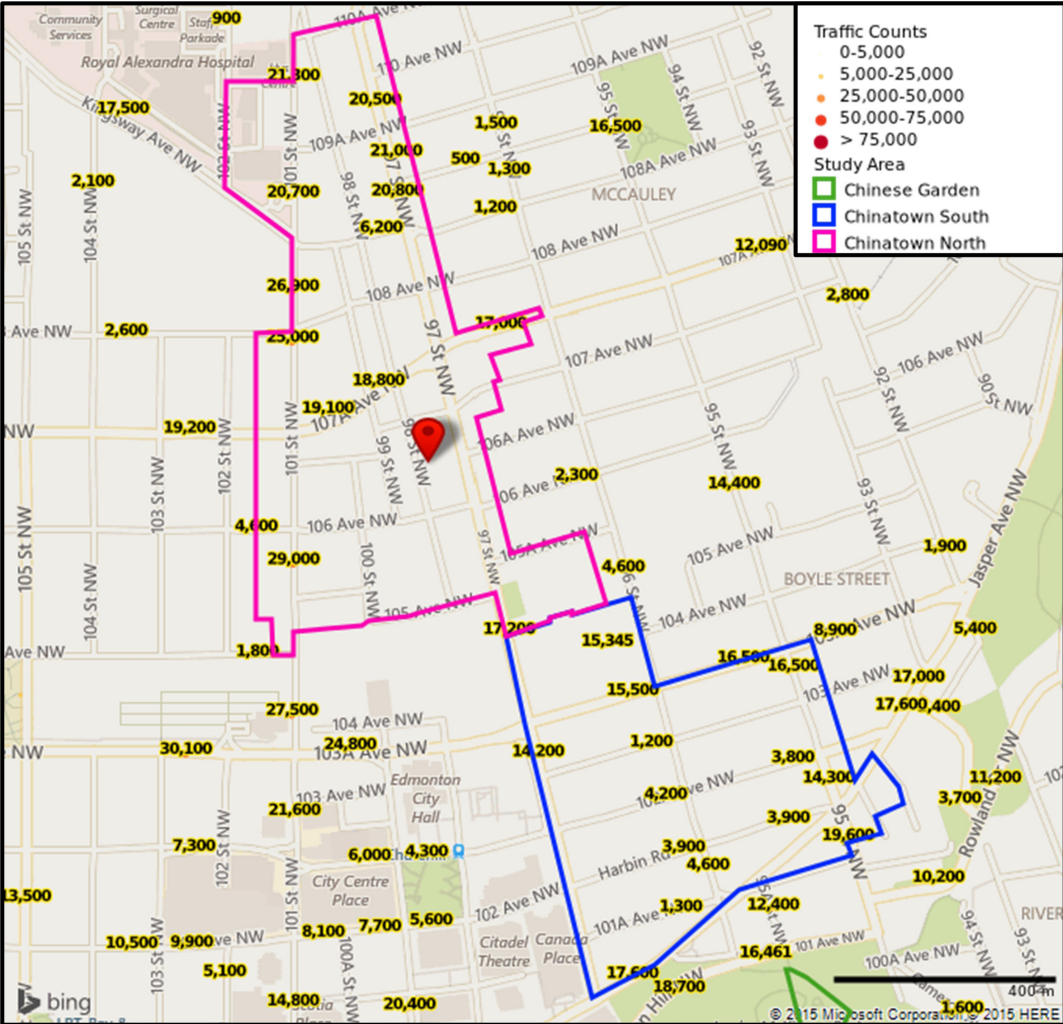
Figure 7: Edmonton Chinatown Traffic Counts, 2015

5.2. Inventory of Land Uses

5.2.1. Retail Uses

The study area of Chinatown North has an estimated 635,000 sq. ft. of rentable retail building area. Some of the largest buildings include the Lucky 97 Market on 97 Street NW with 38,000 sq. ft., the 99 Supermarket on 99 Street NW with 35,000 sq. ft. and The Brick on 101 Street NW with 35,000 sq. ft. Other large retail buildings include the 35,000 sq. ft. multi-tenant building on the northwest corner of 105 Avenue and 97 Street and the 18,000 sq. ft. firearm, knives and tactical gear shop on 99 Street, as well as the 18,000 sq. ft. Hull Block on the northeast corner of 106 Avenue and 97 Street.

Though 635,000 sq. ft. is a significant level of retail, a large proportion of this is large format retail located along 101 Street NW, including a car dealership, repair shop, gas station and other auto-oriented uses. The largest concentration of small format, pedestrian-oriented retail in Chinatown North is located along 97 Street NW, from about 105 Avenue NW to 108 Avenue NW (see Table 1).

There is significantly less retail square footage in Chinatown South, about 250,000 sq. ft. The retail is primarily concentrated along 97 Street NW, Jasper Avenue, and 95 Street NW and much of it requires significant maintenance and/or repair.

Property Type	Avg Number of Storeys	Rentalable Building Area (sq.ft.)	Number of Parking Space	Average Percent Leased
Chinatown North	**1.4**	**634,646**	**1,833**	**97**
General Retail	1.4	509,650	1,368	98
Neighbourhood Retail Strip	1.3	90,000	360	85
Strip Centre	1.3	34,996	105	100
Chinatown South	**1.8**	**251,403**	**583**	**93**
General Retail	1.8	251,403	583	93

Table 1: Edmonton Chinatown Retail Inventory

Figure 8: Edmonton Chinatown Retail Inventory

5.2.2. Office Uses

Edmonton's Chinatown North has approximately 91,000 sq. ft. of rentable building area that is primarily located within four addresses, all of which are 100% is leased. Three of these office buildings are existing Class C spaces while one of the buildings is a proposed Class B building, expected to be completed in 2016.

Chinatown South has a significant amount of office space, almost 1.2 million sq. ft. within 15 Class B and C buildings. A large portion of this office space is institutional in use, such as the Edmonton Police Headquarters (175,000 sq. ft.) and Recruiting Centre (75,000) and the Edmonton Remand Centre (250,000 sq. ft.). The largest office building within Chinatown South is the John E. Brownlee Building (480,000 sq. ft.), located on 103A Avenue, which houses Service Alberta, the Provincial Crown Prosecutors Office as well as Family Justice Services.

Property Type	Avg Number of Storeys	Rentable Building Area (sq. ft.)	Avg Typical Floor Size (sq. ft.)	Number of Parking Spaces	Avg Percent Leased
Chinatown North	**2.0**	**91,000**	**11,375**	**70**	**100**
Class B Office	2.0	10,500	5,250	-	-
Class C Office	2.0	80,500	13,417	70	100
Chinatown South	**3.6**	**1,173,130**	**12,976**	**799**	**95**
Class B Office	5.5	990,430	21,393	530	100
Class C Office	2.3	182,700	7,365	269	92

Table 2: Edmonton Chinatown Office Inventory

Figure 9: Edmonton Chinatown Office Inventory

5.2.3. Multifamily Residential Uses

Chinatown North is estimated to have approximately 365 multifamily residential units, while Chinatown South is estimated to have 670 units. The majority of these units are located in mid-rise buildings of seven to eight storeys. Chinatown North has six multifamily buildings ranging from 3 to 200 units. The largest building is 12 storeys, 200 units, and is located near the edge of Chinatown North at 101 Street NW and 106 Avenue NW.

Chinatown South has an estimated 11 multifamily buildings ranging from 3 units to 285 units. The largest building of 285 units, the 10 storey building called "The Corners", is currently on hold, and was expected to be completed in 2016. Other significant multifamily buildings within Chinatown South include the Chinese Elders Mansion I (100 units), Chinese Elders Mansion II (98 units) and the Chinese Freemasons (100 units), all located along 102 Avenue NW.

Property Type	Avg Number of Storeys	Number of Units	Rentable Building Area (sq. ft.)	Number of Parking Spaces
Chinatown North	**4.8**	**364**	**230,867**	**183**
Low-Rise Apartments	2.3	66	29,375	53
Mid-Rise Apartments	7.3	298	201,492	130
Chinatown South	**5.5**	**670**	**432,077**	**331**
Low-Rise Apartments	2.2	37	29,665	41
Mid-Rise Apartments	8.2	633	402,412	290

Table 3: Edmonton Chinatown Multifamily Residential Inventory

Figure 10: Edmonton Chinatown Multifamily Inventory
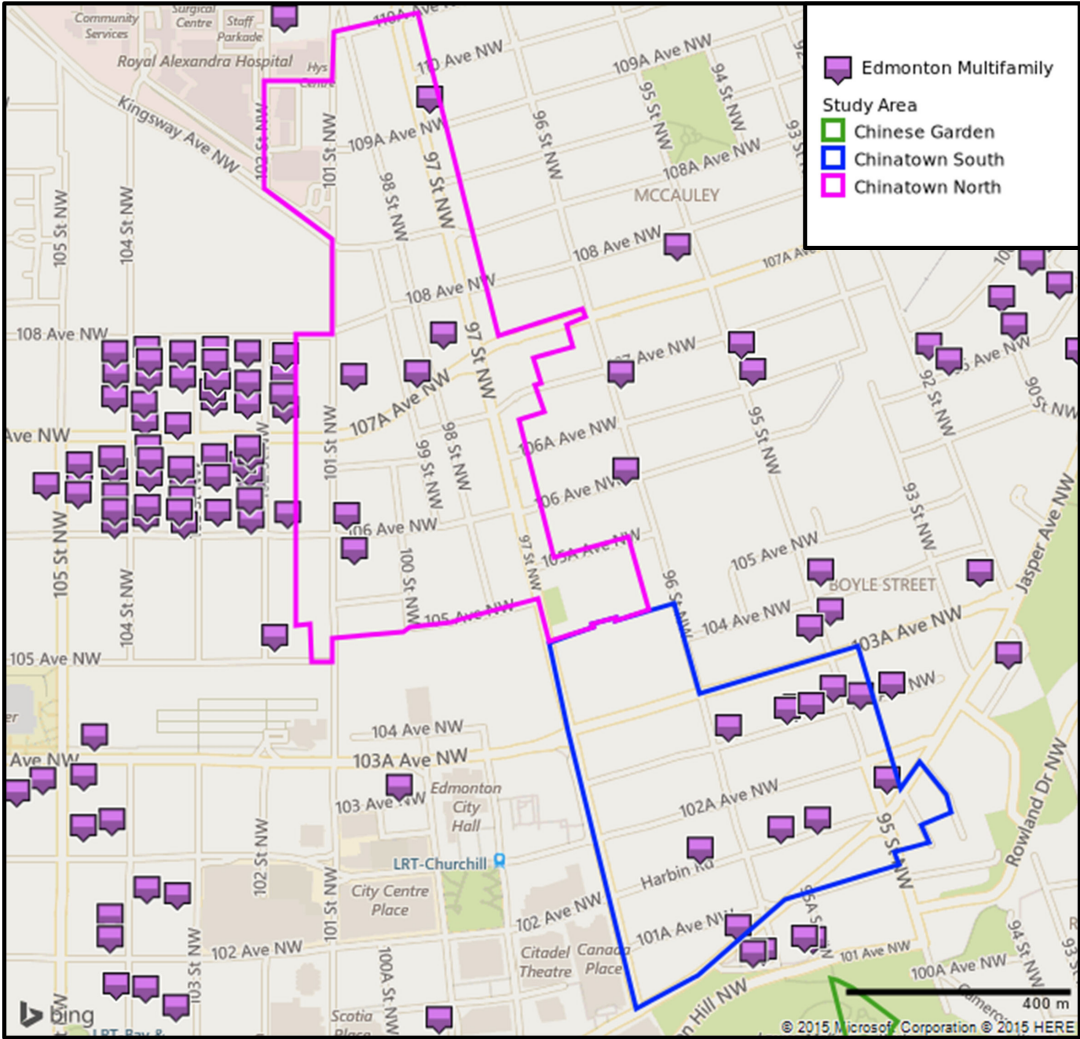
5.2.4. Hospitality Uses

There are four buildings considered hospitality uses within Edmonton's Chinatown, all of which are located in Chinatown South. Three of these buildings are long-term stay hotels or single-room occupancy type of accommodation. The one true hospitality use is the new Hyatt Place hotel, currently under construction, located in the Quarters district. The 13-story hotel, located at Jasper Avenue at 96 Street NW, will have 230 rooms and 11,000 sq. ft. of ground floor commercial space upon completion (early 2016).

Property Type	Avg Number of Storeys	Rentable Building Area (sq. ft.)	Number of Parking Spaces
Chinatown South	**4.5**	**274,411**	**140**
Existing	2.7	32,831	40
Under Construction	10.0	241,580	100

Table 4: Edmonton Chinatown Hospitality Inventory

Figure 11: Edmonton Chinatown Hospitality Inventory
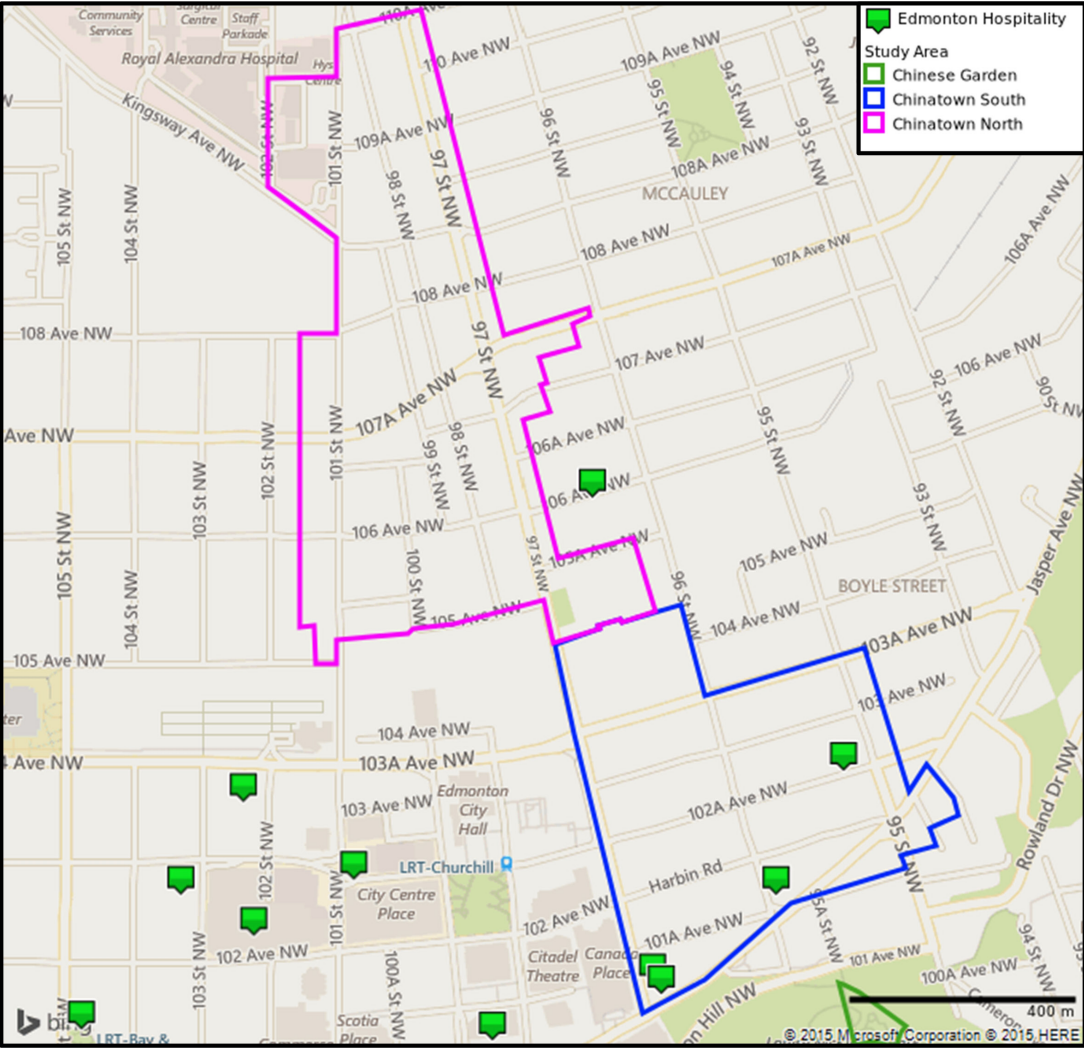
5.3. Competitive Markets

5.3.1. Supermarkets & Grocery

Grocery has always been a core retail anchor and draw to Chinatown's neighbourhoods across North America, providing consumers with access to specialty produce, butchering, seafood, and box goods not found in regular supermarkets. As such, many Edmonton residents frequent the local markets on a daily or weekly basis, providing a significant amount of retail consumer traffic to Edmonton's Chinatown. There are currently three larger markets operating in Chinatown: Lucky 97 on 97th Street NW, 99 Supermarket on 99st NW, and Tiem Thit Kim Phat on 107th Avenue, as well as a number of smaller specialty grocery markets dispersed throughout the area.

Given the suburbanization of Chinese focused retailing in the late 1970's-80's, Chinese grocery markets have relocated outward, to serve the needs of suburban demand. Figure 12 represents the presence of Asian or specialty grocers in the broader City of Edmonton. The advent of large grocers such as T & T, and Superstores in the Asian grocery retail market, has created a much more competitive retailing environment for Edmonton's Chinatown grocers to remain viable and competitive.
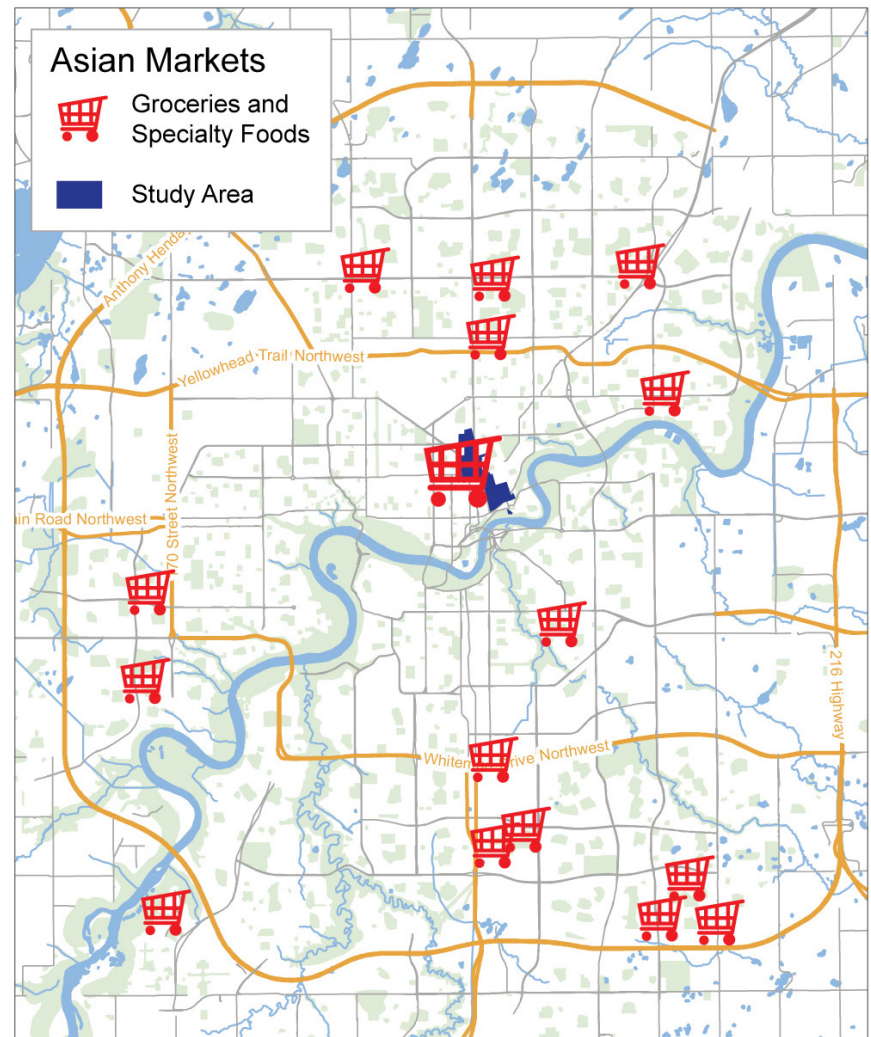
Figure 12: Edmonton Asian Markets

5.3.2. Edmonton Business Improvement Area (BIA)

Chinatown is 1 of 13 established business improvement areaz within Edmonton. A Business Improvement Area (BIA) is a unique opportunity for businesses to work together to accomplish mutual goals. A BIA attracts customers through a variety of enhancements in the retail and neighbourhood environment such as:

- Streetscape improvements
- Joint promotions and festivals
- Economic development initiatives
- Façade Improvement Program
- Development Incentive Program

Edmonton's BIAs, much like the traditional urban "high streets" are typically pedestrian-orientated and offers the consumer a richer experiential shopping experience, than would be provided in a mall environment. Within the 13 zones, some BIAs could be considered a destination and are well-known and recognized by City residents and visitors, currently these include areas such as Whyte Avenue, Downtown and 124 Street. Although, Chinatown is 1 of 13 zones competing for retail spending in Edmonton, it is the sole Asian shopping district within Edmonton and stands to benefit from this competitive advantage through its service offerings and promotion of cultural tourism.
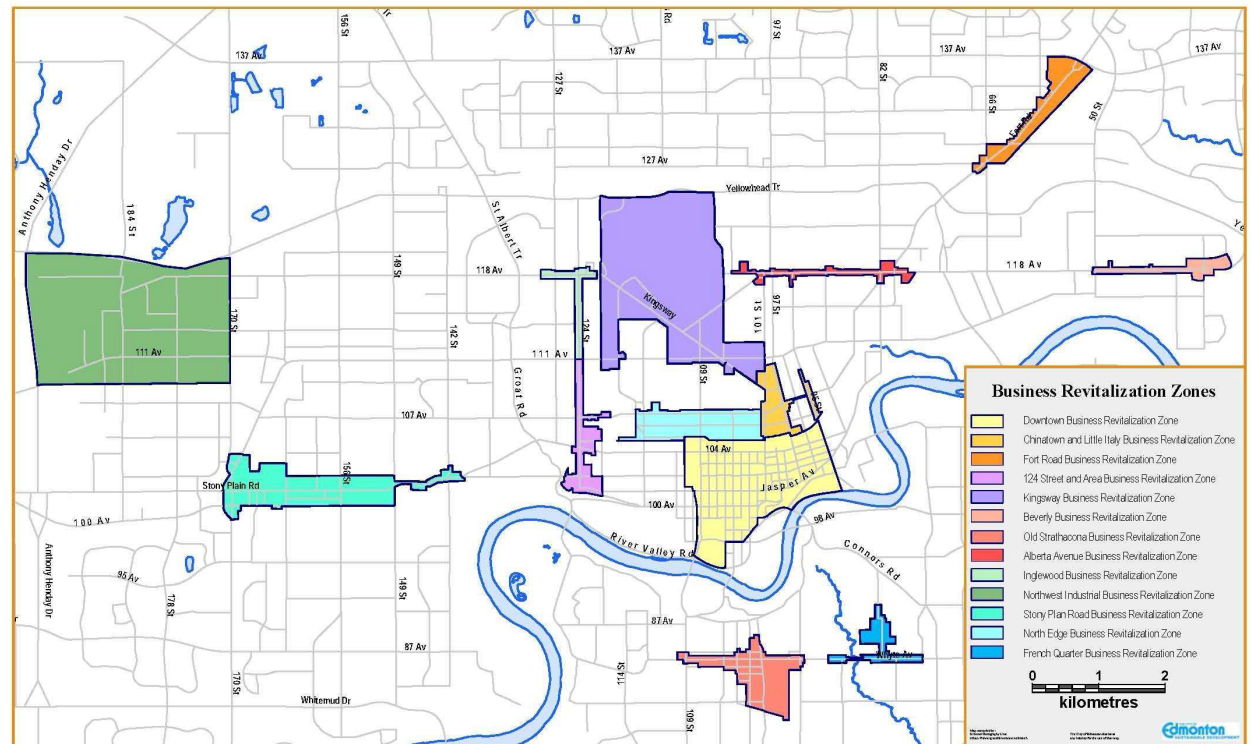
Figure 13: Edmonton Business Revitalization Zones

5.4. Other Site Assessment Considerations

5.4.1. Vacant or Undeveloped Property

Figure 14 adjacent shows the locations of vacant land within the study area and surrounding neighbourhoods. Chinatown North is estimated to have approximately 5.35 acres of vacant land scattered throughout the area, but especially prevalent along 98 Street NW. Chinatown South is estimated to have approximately 2.88 acres of vacant land, largely concentration around 95 and 96 Street NW and 103 and 103A Avenue.

It is important to note that Figure 14 identifies vacant lots. It does not identify buildings that are vacant or underdeveloped properties, of which there are significantly more. Additionally, inventory points may denote multiple parcels under one land owner.
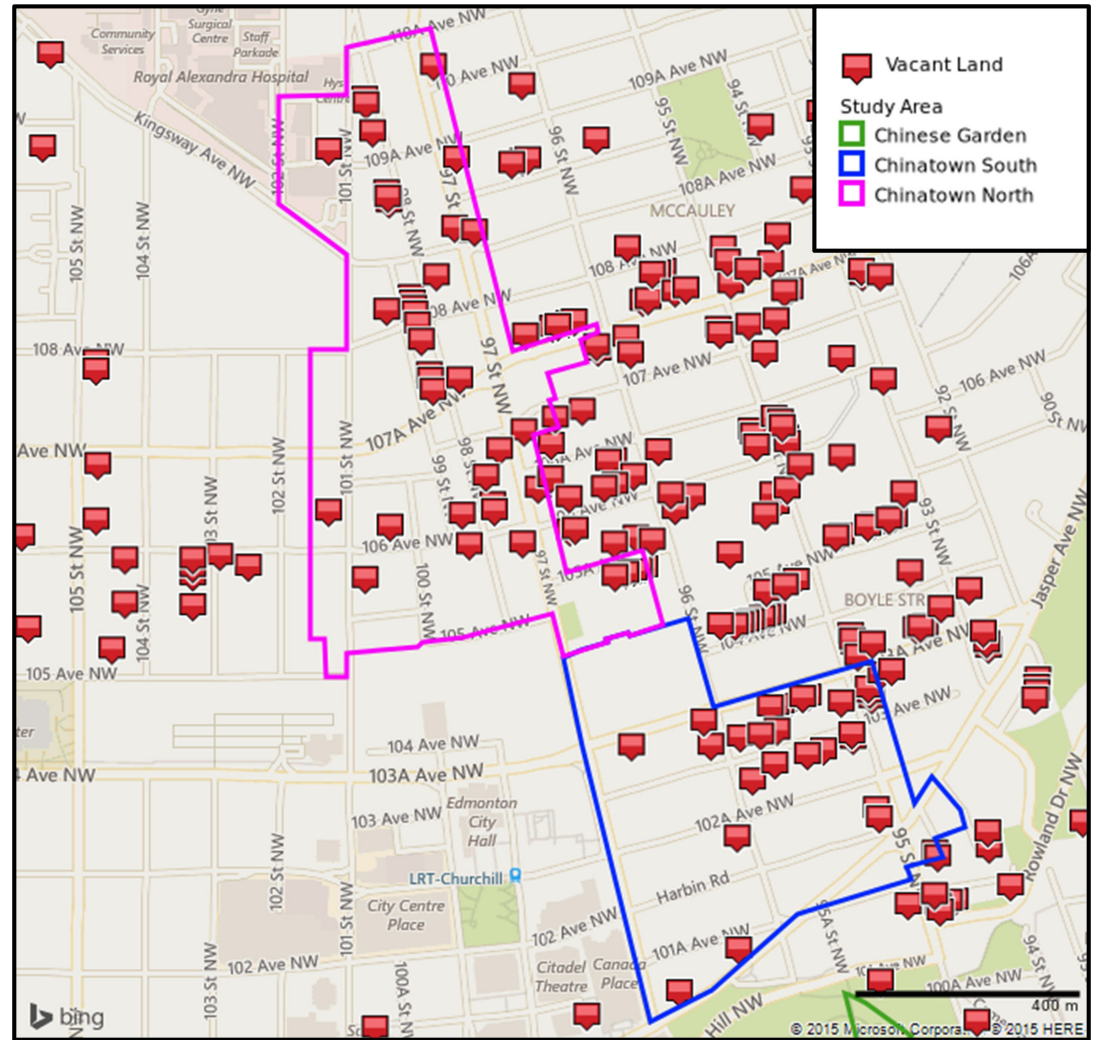
Figure 14: Edmonton Chinatown Vacant Land Inventory

5.4.2. Historical Buildings

Historical buildings provide neighbourhoods with added character and a sense of history and place. Efforts should be made to preserve and incorporate historical buildings into urban commercial districts to differentiate them from newer, more suburban shopping districts.

Figure 15 adjacent identifies the registered historical buildings in Chinatown and the surrounding area. There are two historical buildings within Chinatown North, the Hull Block on 97 Street and the Hagmann Block / Hotel Grand on 98 Street. A third historic building, the A. MacDonald Building, sits on 105 Avenue, just outside the Chinatown North boundary. In Chinatown South, there are seven registered historical buildings within the boundary and one just outside the area. The buildings are concentration on Jasper Avenue and the southern end of 97 Street. The buildings include the Kingston Powell Building, Lambton Block, Goodridge Building, Ernest Brown Block / Brighton Block, Pendennis Hotel / Lodge Hotel, and Gibson Block.

Figure 15: Edmonton Chinatown Historical Building Inventory

5.5. Demographic Analysis

Economic and demographic factors such as employment, population, income, household structure, age structure, ethnicity are important to forecasting the market opportunity for commercial and residential uses within the study area.

5.5.1. Employment Forecast

An employment forecast for the City and CMA of Edmonton, to the year 2030, is shown in Table 5. A sensitivity analysis with a low, medium, and high scenario has been utilized in an attempt to take the volatile provincial economy, heavily reliant on world oil prices, into account. Though the sensitivity analysis provides a range of possible employment figures, it is important to note that forecasting so far into the future is already unreliable and thus employment figures may still fall outside of the given range.

According to the employment forecast, the City of Edmonton's employment figures are expected to grow from 493,000 jobs in 2015 to between 582,000 and 781,000 jobs in 2030. This represents an incremental growth of between 89,000 and 288,000 jobs. The Edmonton CMA is forecasted to grow from 760,000 jobs in 2015 to 1,026,000 to 1,373,000 jobs in 2030. That is an incremental growth of between 266,000 and 613,000 jobs.

City of Edmonton	2013	2014	2015	2016	2017	2018	2019	2020	2025	2030
Low Scenario										
Employment (000s)	479	490	493	490	490	495	501	507	544	582
Medium Scenario										
Employment (000s)	479	490	493	495	500	510	521	533	600	675
High Scenario										
Employment (000s)	479	490	493	500	510	525	542	560	661	781
Edmonton CMA	2013	2014	2015	2016	2017	2018	2019	2020	2025	2030
Low Scenario										
Employment (000s)	717	742	760	779	796	813	843	857	938	1,026
Medium Scenario										
Employment (000s)	717	742	760	787	812	837	876	900	1,034	1,188
High Scenario										
Employment (000s)	717	742	760	795	828	862	910	944	1,139	1,373

Table 5: Edmonton City and CMA Employment Forecast

5.6. Population Forecast

A population forecast for the City of Edmonton to the year 2030 is shown in the table below. Population growth is largely dependent on employment growth and, thus, population projections are susceptible to similar uncertainties. As a result, the population forecast includes a sensitivity analysis, with a low, medium, and high scenario.

As shown on the following page, the City's population is projected to grow from 893,000 in 2015 to between 908,000 and 1,302,000 by 2030. This represents an incremental increase of between 61,000 and 455,000 people. Though this represents a wide range, there is significant uncertainty surrounding Edmonton's long-term economic outlook, which is heavily reliant on the oil industry.

City of Edmonton	2013	2014	2015	2016	2017	2018	2019	2020	2025	2030
Low Scenario										
Population (000s)	847	878	893	894	895	896	897	898	903	908
Annual Change		*3.6%*	*1.7%*	*1.6%*	*1.8%*	*2.0%*	*2.1%*	*2.1%*	*1.9%*	*2.0%*
Medium Scenario										
Population (000s)	847	878	893	907	924	943	962	982	1,082	1,193
Annual Change		*3.6%*	*1.7%*	*1.6%*	*1.8%*	*2.0%*	*2.1%*	*2.1%*	*1.9%*	*2.0%*
High Scenario										
Population (000s)	847	878	893	907	924	942	962	982	1,081	1,192
Annual Change		*3.6%*	*1.7%*	*1.6%*	*1.8%*	*2.0%*	*2.1%*	*2.1%*	*1.9%*	*2.0%*

Table 6: City of Edmonton Population Forecast

5.7. Other Demographics

Other demographics, such as income, household structure, age structure, and ethnicity have been analyzed as they will also affect the demand for commercial and residential uses within the study area.

5.7.1. Income

As shown in the figure adjacent, the study has a lower average and median income when compared to the surrounding neighbourhoods of McCauley, Boyle Street and Downtown, which overlap with parts of the study area. This is especially true of Chinatown South, which has an average income of only $15,000 and a median income of only $13,500. Chinatown North is considerably higher, with an average household income of $32,300 and a median income of $24,900. However, when compared to the City and CMA overall, both Chinatown North and South have significantly lower household incomes.

2011 Household Income (2015 $)	McCauley	Boyle Street	Downtown	Chinatown South	Chinatown North	Edmonton (CY)	Edmonton (CMA)
Under $10,000	17%	17%	9%	36%	18%	4%	3%
$ 10,000 - $19,999	22%	22%	14%	40%	23%	7%	6%
$ 20,000 - $29,999	17%	17%	13%	19%	18%	8%	7%
$ 30,000 - $39,999	13%	13%	11%	5%	14%	9%	8%
$ 40,000 - $49,999	9%	10%	9%	1%	10%	8%	8%
$ 50,000 - $59,999	6%	7%	7%	0%	6%	8%	7%
$ 60,000 - $69,999	4%	4%	6%	0%	4%	7%	7%
$ 70,000 - $79,999	3%	2%	5%	0%	3%	7%	7%
$ 80,000 - $89,999	2%	2%	4%	0%	2%	6%	6%
$ 90,000 - $99,999	2%	2%	4%	0%	1%	6%	6%
$ 100,000 - $ 124,999	3%	3%	7%	0%	1%	10%	12%
$ 125,000 - $ 149,999	2%	1%	5%	0%	1%	7%	9%
$ 150,000 - $ 174,999	1%	0%	2%	0%	0%	5%	6%
$ 175,000 - $ 199,999	0%	0%	1%	0%	0%	3%	3%
$ 200,000 - $ 249,999	0%	0%	1%	0%	0%	3%	3%
$ 250,000 and over	0%	0%	1%	0%	0%	3%	4%
Average Income	$36,543	$36,966	$59,948	$15,020	$32,266	$91,928	$100,004
Median Income	$26,525	$26,806	$43,546	$13,474	$24,939	$69,300	$77,018

Table 7: Edmonton Household Income by Neighbourhood

Figure 16: Edmonton Chinatown by Median Income, 2011
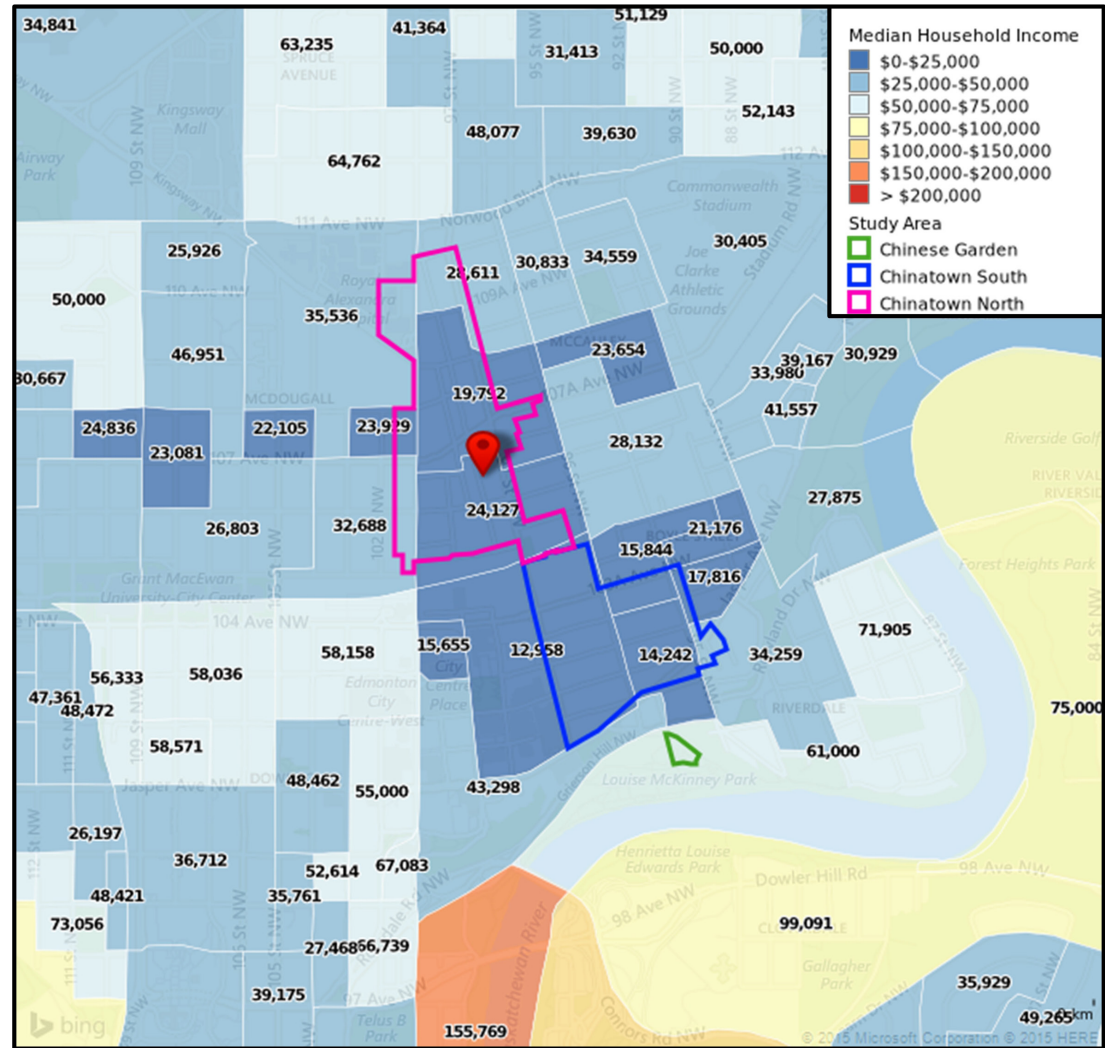
5.7.2. Household Tenure & Size

Chinatown South has a small quantity of occupied private dwellings, in part because of the large concentration of collective dwellings. Of the private occupied dwellings in Chinatown South, 94% of them are rented and the majority were built between 1981 and 1990. In Chinatown North 86% of private occupied dwellings are rented and the dominant period of construction was prior to 1960. Thus, the study area rental rates are significantly lower than the City and CMA overall. The surrounding neighbourhoods analyzed also saw higher rental rates, though not as significant as that of Chinatown North and South.

Chinatown North and South, as well as the surrounding neighbourhoods have significantly smaller households than the Edmonton City and CMA. Chinatown North, McCauley, Boyle Street, and Downtown Edmonton are made up of approximately 60% single person households. Chinatown South is even higher at nearly 70%.

2011 Household Tenure	McCauley	Boyle Street	Downtown	Chinatown South	Chinatown North	Edmonton (CY)	Edmonton (CMA)
Occupied Private Dwellings	2013	2864	6722	284	648	324756	450786
Owned	27%	21%	29%	6%	15%	65%	71%
Rented	73%	79%	71%	94%	86%	35%	29%
Dominant period of construction	Before 1960	1961-1980	1961-1980	1981-1990	Before 1960	1961-1980	1961-1980
2011 Household Size							
1 person	57%	57%	58%	69%	60%	29%	26%
2 persons	20%	27%	35%	28%	22%	33%	34%
3 persons	7%	9%	6%	1%	4%	16%	16%
4 persons	9%	4%	1%	1%	7%	14%	15%
5 persons	3%	2%	0%	1%	2%	5%	6%
6 or more persons	4%	1%	0%	0%	6%	3%	3%

Table 8: Edmonton Household Tenure and Size by Neighbourhood

5.7.3. Age Structure

Chinatown North and South have a higher median age than the Downtown neighbourhood, the City and the CMA. The neighbourhoods of McCauley and Boyle Street have similarly high median ages. Chinatown South, with its concentration of seniors' housing and facilities, has a median age of 57 years of age; 45% of the population is above 60 years old. Chinatown North, while still older than the City and CMA overall, is more balanced with only 17% aged over 60 years old, but with a higher concentration of those aged 40 to 59 years.

Going forward, Edmonton, like many Canadian cities is expected to grow older. As show in Table 10, while the 0 to 14 years of age cohort is expected to remain fairly stable, the 15 to 29 year cohort is anticipated to decrease quite significantly. Conversely, the 60 + years old age groups are expected to gradually increase. Edmonton's aging population is important to consider as, over time, it will affect the type of housing and services demanded.

2011 Census	McCauley	Boyle Street	Downtown	Chinatown South	Chinatown North	Edmonton (CY)	Edmonton (CMA)
Total Population	**4,770**	**6,356**	**11,044**	**1,187**	**1,677**	**812,201**	**1,159,869**
0 to 19 years	12%	12%	5%	3%	10%	23%	24%
20 to 39 years	29%	36%	60%	20%	31%	33%	31%
40 to 59 years	38%	30%	20%	31%	42%	28%	29%
60 to 79 years	18%	16%	9%	23%	15%	13%	13%
80 + years	3%	7%	6%	22%	2%	3%	3%
Median Age	**45.5**	**41.5**	**31.9**	**57.1**	**44.8**	**36.1**	**36.5**

Table 9: Edmonton Age Structure by Neighbourhood

Age Cohort	2006	2011	2016	2021	2026	2030
0 - 14 years	17%	17%	17%	18%	17%	17%
15 - 29 years	24%	24%	22%	20%	19%	20%
30 - 44 years	22%	22%	24%	25%	25%	23%
45 - 59 years	21%	21%	20%	19%	19%	20%
60 - 74 years	10%	11%	12%	14%	14%	13%
75 - 89 years	5%	5%	5%	5%	5%	6%
90 + years	0%	1%	1%	1%	1%	1%

Table 10: Edmonton Population Forecast by Age Cohort

5.7.4. Ethnicity

The study area of Chinatown North and South is more ethnically diverse than the surrounding neighbourhoods and City overall. As of the 2006 Census, approximately 48% of Chinatown South's population was a visible minority; 44% were Chinese, followed by 3% Black, 1% Southeast Asian, 1% Arab and 1% multiple visible minorities. In Chinatown North, approximately 42% of the population identified as a visible minority; 15% were Chinese, followed by 12% Southeast Asian, 5% Black, 2% South Asian, 2% Filipino, 2% Latin American, and 2% multiple visible minorities.

"2006 Census Visible Minorities"	McCauley	Boyle Street	Downtown	Chinatown South	Chinatown North	Edmonton (CY)
Total Population	**3,582**	**5,389**	**9,673**	**761**	**769**	**722,260**
Total visible minorities	33%	34%	26%	48%	42%	23%
Chinese	***15%***	***16%***	***12%***	***44%***	***15%***	***6%***
South Asian	1%	2%	5%	0%	2%	5%
Black	4%	8%	2%	3%	5%	3%
Filipino	1%	1%	1%	0%	2%	3%
Latin American	2%	1%	1%	0%	2%	1%
Southeast Asian	8%	3%	1%	1%	12%	1%
Arab	0%	2%	1%	1%	0%	2%
West Asian	0%	0%	0%	0%	0%	0%
Korean	0%	1%	2%	0%	0%	0%
Japanese	0%	0%	0%	0%	0%	0%
Visible minority, n.i.e.	0%	0%	0%	0%	1%	0%
Multiple visible minority	0%	1%	1%	1%	2%	1%
Not a visible minority (includes white and aboriginal)	67%	66%	74%	53%	58%	77%

Table 11: Edmonton Visible Minority Group by Neighbourhood

5.8. SWOT Analysis

Based upon the market analysis, we have developed an analysis of strengths, weaknesses, opportunities, and threats (SWOT) related to economic development in Chinatown. The primary objective of the SWOT analysis is to identify some of the key economic opportunities and constraints faced by Edmonton's Chinatown.

A SWOT is meant to be a succinct high level assessment of the strengths, weaknesses, opportunities and threats to the planning process and is not to be an exhaustive list

Strengths	Weaknesses
• Proximity to Downtown Edmonton and the civic and arts and culture district • Presence of vehicular thoroughfares and busy bus routes • Proximity of Churchill LRT Station and the future Quarters LRT Station • Presence of retail anchors that have a fairly strong following	• The study area (Chinatown North and South) is large and spread out; is also not contiguous • Immediate area surrounding Chinatown is relatively lower income • Aging and/or inadequate infrastructure • Concentration of social agencies contribute to the perception of safety issues • Fractious property ownership non-conducive to redevelopment
Opportunities	**Threats**
• The ICE District represents an opportunity as Chinatown may be able to draw consumers from the District with strong connectivity • Create linkages and connections to the Royal Alexandra Hospital district, and Downtown Edmonton (ex. new Royal Alberta Museum, office district) • Promote Chinese, Asian, and/or Chinese-Canadian arts and culture • Promote relationship with the Edmonton's sister city, the City of Harbin • Install a new "Chinatown" LRT station on the existing northeast line	• The ICE District also represents a threat as it is expected to have a significant quantity of commercial and entertainment land uses • The drop in oil prices may have negative long term effects on the rate of consumer spending, employment, population growth, and residential development • The revitalization of Edmonton's Chinatown will take significant measures and resources; incremental changes are not likely sufficient; a catalytic project may be necessary • Competition between for investment resources between southern and northern Chinatown areas.

Table 12: Edmonton Chinatown SWOT Analysis

5.9. Market Share Analysis

The following section will serve to identify the amount of market support that Edmonton's Chinatown North and South can realistically be expected to "capture" over the course of the study period given the market and economic context in Edmonton. It must also be noted that given the steady decline in investment in Chinatown over the years it should be inferred that such trends will continue without interventional policy, planning and design initiatives in place. Thus, in the absence of such measures, even the preliminary forecasts for Chinatown land uses found in later sections of this report may be significantly overstated.

Market Share Scenario Analysis

In order to provide a realistic forecast of the demand for varying land uses on the subject site, the relative strength of the market and the economy (i.e. growth of the economy, population growth, strength of the project, strength of competitors) and amount of market support or "capture" must be determined. Both factors, the overall market and the "capture" rate, are represented through the use of market shares.

Discussed below are three scenarios that broadly represent the most likely factors, external to each land use, that are seen as impacting the overall demand for land uses being evaluated in this study. Factors of consideration in the low, medium and high growth scenarios include economic growth, surrounding land uses and competition, demographic and population growth, and project related factors. The latter relating to the level of synergy or how

well the project's various components work together to complement one another and to create a project that is greater than the sum of its parts.

Separate and apart from this, market shares are used to reflect the percentage of total market demand that the project is anticipated to "capture". This is discussed further in each of the following sections relating to individual land use opportunities, but is designed to reflect the amount of market demand that a reasonably competitive project would attract.

While all efforts are made to base the market shares on accurate estimates and quantifiable figures, there is a broad array of external and internal influences that cannot be taken as a certainty and whose change would affect market shares. Thus, three separate market share scenarios have been employed. These scenarios take into account varying levels of regional and local economic performance, the level of development of Chinatown as a whole, level of competitiveness of surrounding land uses to be developed.

- **Low Scenario –** Assumes conditions such as lower economic or population growth, increased interest rates (resulting in lower demand for housing), slow residential development in surrounding neighbourhoods, little or no connectivity of surrounding developments (i.e. ICE District and/or Royal Alberta Museum) to Chinatown, significant delays in the LRT Quarter Station, or other similar factors.
- **Medium Scenario –** Assumes that economic forecasts remain as expected, surrounding neighbourhoods gradually increase housing density, the ICE District and RAM develop connections to Chinatown, the new LRT Quarters Station is delivered on schedule or only slightly delayed, and Chinatown becomes a diverse and active retailing and residential area.

- **High Scenario –** Assumes that regional or local economic growth is stronger than anticipated and that interest rates remain at present lows, surrounding area densify in the short term with medium rise residential developments, surrounding developments like the ICE District and RAM are highly connected to Chinatown through physical and programmatic mechanisms, the new LRT Quarters Station is developed on time and a new Chinatown station is developed on the northeast end, and Chinatown becomes an exciting, authentic retailing residential and commercial area.

The following opportunity analyses provide warranted demand forecasts under each of the low, medium and high capture/growth scenarios. Generally, the medium scenario represents the most likely growth and capture, though, depending on various economic growth factors, external development characteristics and subject site development features, specific land uses could experience the either low or high growth scenarios. It is important to note that, though every effort has been made to accurately forecast market shares, they do change as a result of both internal and external factors and should be reviewed from time to time.

Edmonton Office Inventory
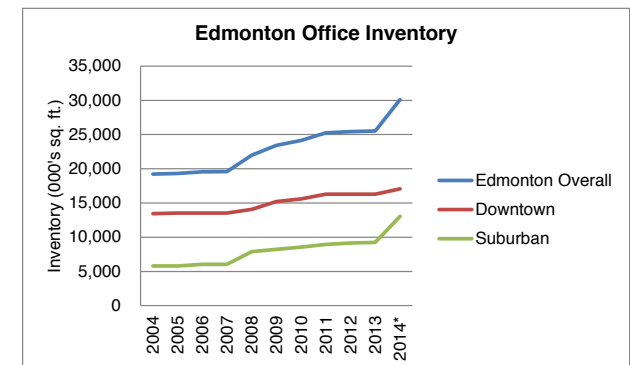
5.9.1. Office Market Analysis

Historical office inventory is shown in the table below. As shown, there has been a slight increase in inventory during the past year primarily related to suburban office market growth.

EDMONTON OVERALL	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014*
Total Office Inventory (000's sq. ft.)	19,218	19,312	19,550	19,580	21,977	23,429	24,151	25,241	25,435	25,523	30,115
Net Absorption (000's sq. ft.)	441	340	17	425	547	-206	-143	558	391	159	-142
Vacancy Rate (%)	9.29%	6.70%	7.25%	4.75%	6.85%	8.30%	9.10%	10.00%	8.80%	7.50%	8.50%
DOWNTOWN											
Downtown Total Inventory (sq. ft.)	13,428,600	13,522,712	13,522,712	13,531,661	14,072,895	15,203,610	15,604,170	16,292,000	16,292,000	6,291,737	17,075,055
Downtown Total Inventory (000's sq. ft.)	13,429	13,523	13,523	13,532	14,073	15,204	15,604	16,292	16,292	16,292	17,075
Net Absorption (000's sq. ft.)	331	254	-58	217	233	-184	52	439	211	108	-100
Vacancy Rate (%)	8.34%	6.14%	5.70%	4.10%	5.60%	5.80%	7.70%	8.50%	6.90%	6.50%	8.00%
Share of Total Inventory	*70%*	*70%*	*69%*	*69%*	*64%*	*65%*	*65%*	*65%*	*64%*	*64%*	*57%*
SUBURBAN											
Suburban Total Inventory (000's sq. ft.)	5,790	5,790	6,028	6,048	7,904	8,225	8,546	8,949	9,143	9,231	13,040
Net Absorption (000's sq. ft.)	110	86	75	208	314	-22	-195	119	180	51	-42
Vacancy Rate (%)	8.86%	7.50%	8.80%	5.40%	8.10%	8.30%	11.80%	11.20%	10.70%	9.40%	9.20%
Share of Total Inventory	*30%*	*30%*	*31%*	*31%*	*36%*	*35%*	*35%*	*35%*	*36%*	*36%*	*43%*

* Year to date figures (Q3, 2014)

Table 13: Historical Office Inventory

Office Demand Analysis

In order to facilitate the office market potential analysis, one methodologies has been employed as a means of better testing the demand for future office space in the City and subject site based on office space/employment ratio.

Once total citywide demand for office space over the study period is determined, the demand is disaggregated into a Downtown (includes Chinatown area by proximity) and suburban share. Suburban office share has been increasing in the City overall, while Downtown office share has been decreasing. This trend is expected to continue over the study timeframe, though to a lesser extent than historically seen. Increased interest in Downtown office developments in recent years show a renewed interest from companies in locating in Downtown Edmonton.

After projected the warranted Downtown office space, the warranted inventory is adjusted for vacancy allowance using the 10 year historic downtown office vacancy rate. From here, the incremental demand for Downtown office space going forward can be calculated. A low, medium, and high market share, the share the subject site can reasonably be expected to capture of the incremental demand for Downtown office space, is then applied.

Accordingly, in 2015, there is no demand for additional office space is warranted at the subject site. By 2020, there is anticipated to be a cumulative demand for 15,000 to 151,000 sq. ft. and by 2025 this demand grows to 55,000 to 299,000 sq. ft. By 2030, cumulative office space demand at the subject site is expected to be in the range of 100,000 to 465,000 sq. ft., with a medium most-likely scenario of 247,000 sq. ft. of cumulative demand.

Avg Incremental Demand for Office Space On-Site	2015	2020	2025	2030
Subject Site Market Share - LOW				
Warranted On-Site Office Demand (000's sq. ft.)	-	16	37	42
Cumulative On-Site Office Demand (000's sq. ft.)	-	16	53	95
Subject Site Market Share - MEDIUM				
Warranted On-Site Office Demand (000's sq. ft.)	-	82	74	84
Cumulative On-Site Office Demand (000's sq. ft.)	-	82	156	239
Subject Site Market Share - HIGH				
Warranted On-Site Office Demand (000's sq. ft.)	-0.5	163	137	153
Cumulative On-Site Office Demand (000's sq. ft.)	-0.5	162	299	451

Table 14: Edmonton Chinatown Office Market Opportunity Summary

5.9.2. Residential Market Analysis

Analysis A forecast of residential demand for the City of Edmonton has been projected in five year increments from 2011 to 2031. The forecast is delineated by rental and owned units, and by ground-oriented dwellings units (single-detached, rowhomes, apartments fewer than five storeys and movable dwellings) and apartment units of more than five storeys. In order to forecast housing demand to 2031, 2011 household maintainer rates by age cohort for the City of Edmonton have been applied to 2016, 2021, 2026 and 2031 population forecasts.

As shown in the table below, from 2011 to 2031, residential demand in the City of Edmonton is expected to be approximately 10,685 units a year, 93% of which will be in the form of ground-oriented dwellings and 7% in apartments of greater than five storeys. Of the average annual units demanded, approximately 69% are owner- occupied, while the remaining 31% are rental units. There are a greater proportion of apartment units (greater than five storeys) demanded within the rental housing category than the owner-occupied category.

2011 Census	Downtown	Chinatown South	Chinatown North	Edmonton (CY)	Edmonton (CMA)
Private Dwellings Occupied by Usual Residents, 2011	**6,746**	**233**	**607**	**324,756**	**450,786**
Single-detached house	0.7%	0.8%	19.4%	51.0%	58.6%
Apartment, building that has five or more storeys	78.0%	25.5%	12.3%	7.9%	5.8%
Apartment, building that has fewer than five storeys	19.8%	72.0%	57.9%	23.0%	18.7%
Apartment, duplex	0.2%	1.2%	9.1%	2.6%	2.0%
Row house	1.2%	0.0%	0.0%	9.6%	8.2%
Semi-detached house	0.1%	0.0%	1.3%	4.9%	5.0%
Other single-attached house	0.0%	0.6%	0.0%	0.1%	0.1%
Movable dwelling	0.0%	0.0%	0.0%	0.9%	1.6%

Table 15: Edmonton Chinatown Dwelling Type

Total Demand		2011	2016	2021	2026	2031	
Owner Housing							
	Ground-oriented dwellings	203,800	228,920	255,510	282,920	311,250	
	Apartments (5 + storeys)	6,870	7,730	8,540	9,380	10,290	
Rental Housing							
	Ground-oriented dwellings	95,880	106,180	116,260	126,690	137,480	
	Apartments (5 + storeys)	18,190	20,130	21,890	23,850	26,000	
Owner & Rental Housing							
	Ground-oriented dwellings	299,680	335,100	371,770	409,610	448,730	
	Apartments (5 + storeys)	25,060	27,860	30,430	33,230	36,290	
	Total	324,740	362,960	402,200	442,840	485,020	
Incremental Demand		2011	2016	2021	2026	2031	Avg Annual
Owner Housing							
	Ground-oriented dwellings		25,120	26,590	27,410	28,330	7,163
	Apartments (5 + storeys)		860	810	840	910	228
Rental Housing							
	Ground-oriented dwellings		10,300	10,080	10,430	10,790	693
	Apartments (5 + storeys)		1,940	1,760	1,960	2,150	130
Owner & Rental Housing							
	Ground-oriented dwellings		35,420	36,670	37,840	39,120	9,937
	Apartments (5 + storeys)		2,800	2,570	2,800	3,060	749
	Total		38,220	39,240	40,640	42,180	10,685

Table 16: City of Edmonton Residential Demand Forecast

5.9.3. Hospitality Demand

This section investigates the market potential for hospitality under two scenarios, Methods A and B.

	Historical		Projected				
	2006	2011	2014	2015	2020	2025	2030
HOTEL DEMAND BY POPULATION RATIO							
Total Population (Edmonton City)	730,372	812,201	878,000	893,000	982,000	1,082,000	1,193,000
Edmonton City Hotel Room Supply			11,000				
Population to Hotel Room Ratio			80	80	80	80	80
Projected Hotel Room Demand (no. of rooms)				11,163	12,275	13,525	14,913
Incremental Hotel Room Demand				163	1,113	1,250	1,388
Subject Site Market Share - LOW				2%	2%	2%	2%
Warranted On-Site Hotel Room Demand				3	23	28	33
Cumulative On-Site Hotel Room Demand				3	26	54	87
Subject Site Market Share - MEDIUM				3%	3%	3%	4%
Warranted On-Site Hotel Room Demand				5	35	41	50
Cumulative On-Site Hotel Room Demand				5	40	81	131
Subject Site Market Share - HIGH				4%	4%	4%	5%
Warranted On-Site Hotel Room Demand				7	46	55	66
Cumulative On-Site Hotel Room Demand				7	53	108	174

Table 17: Chinatown Hotel Market Opportunity (Method A)

	Historical		Projected				
	2006	2011	2014	2015	2020	2025	2030
HOTEL DEMAND BY POPULATION RATIO							
Total Population (Edmonton City)	398,060	451,395	490,000	493,000	533,000	600,000	675,000
Edmonton City Hotel Room Supply			11,000				
Population to Hotel Room Ratio			45	45	45	45	45
Projected Hotel Room Demand (no. of rooms)				10,956	11,844	13,333	15,000
Incremental Hotel Room Demand				-44	889	1,489	1,667
Subject Site Market Share - LOW				2%	2%	2%	2%
Warranted On-Site Hotel Room Demand				-1	18	33	40
Cumulative On-Site Hotel Room Demand				-1	17	50	90
Subject Site Market Share - MEDIUM				3%	3%	3%	4%
Warranted On-Site Hotel Room Demand				-1	28	49	60
Cumulative On-Site Hotel Room Demand				-1	27	76	136
Subject Site Market Share - HIGH				4%	4%	4%	5%
Warranted On-Site Hotel Room Demand				-2	37	66	79
Cumulative On-Site Hotel Room Demand				-2	35	101	180

Table 18: Chinatown Hotel Market Opportunity (Method B)

5.9.4. Chinatown Residential Forecast

This section investigates the market potential for residential units specifically at the subject site, Chinatown North and South. Each housing type, single-detached, semi-detached/duplex, rowhouse/townhouse, apartment 5 storeys or below, and apartment above 5 storeys has been assigned three market shares representing the low, medium most-likely and high scenarios. These market shares gradually increase over the study period to reflect the growing attractiveness of the subject site as revitalization measures are put in place.

When considering the market shares, it is important to note that they represent the subject site's estimated market capture for the entire City of Edmonton. The subject site has many positive attributes that make it attractive to potential residents, including its urban character, proximity to Downtown, connection to the LRT, existing cultural attractions and commercial uses. However, there are other areas of the City that are equally, or even more so, competitive. For example, apartment units developed at the subject site will be in direct competition with apartment units being developed in Downtown Edmonton, including the ICE District.

	2016	2021	2026	2031
Low Market Share **Owner Housing**				
Ground-oriented dwellings	126	140	151	164
Apartments (5 + storeys)	9	9	9	11
Rental Housing				
Ground-oriented dwellings	103	106	115	125
Apartments (5 + storeys)	29	28	32	37
Owner & Rental Housing				
Ground-oriented dwellings	229	245	266	289
Apartments (5 + storeys)	38	36	42	48
Total	266	282	308	337
Medium Market Share **Owner Housing**				
Ground-oriented dwellings	251	279	302	328
Apartments (5 + storeys)	17	17	19	21
Rental Housing				
Ground-oriented dwellings	206	212	230	250
Apartments (5 + storeys)	58	55	65	75
Owner & Rental Housing				
Ground-oriented dwellings	457	491	532	578
Apartments (5 + storeys)	75	72	83	96
Total	533	563	616	674

Continued from previous.

	2016	2021	2026	2031
High Market Share				
Owner Housing				
Ground-oriented dwellings	502	558	604	656
Apartments (5 + storeys)	26	26	28	32
Rental Housing				
Ground-oriented dwellings	309	318	345	375
Apartments (5 + storeys)	87	83	97	112
Owner & Rental Housing				
Ground-oriented dwellings	811	876	949	1,031
Apartments (5 + storeys)	113	109	125	144
Total	925	985	1,074	1,174

Table 19: Chinatown Incremental Residential Demand Forecast

5.10. Retail Demand Analysis

5.10.1. Trade Area Assessment

In order to effectively gauge the potential demand for various retail and entertainment facilities at the subject site, it is important to understand the retail trade area. This is a geographic area surrounding the subject site from which the vast majority, normally 85% to 95%, of annual sales volume is generated. For land uses that do not have an expenditure-based demand, such as residential, office and hospitality, the entire City of Edmonton is used as the study area.

Based on a thorough review of physical and psychological barriers, transportation patterns and notable commercial competition, it has been determined that the subject site's retail trade area is generally bounded by a 15 minute drive time, as noted in the figure adjacent.

Figure 17: Edmonton Chinatown Retail Trade Area

5.10.2. Retail Zones

The rate at which retail sales occur from residents within a trade area is considered to decay as one moves further away from a retail facility. Retail trade areas are often disaggregated into smaller trade zones to better represent different levels of market penetration from within the larger trade area.

These zones are then studied on the basis of demographic and economic characteristics for a more advanced analysis. Primary, secondary, and tertiary trade zones have been delineated for this study. The primary zone is represented by a 1 mile radius from the centre point of the study area, or a 15 – 20 minute walking radius. The secondary zone is represented by a 10 minute drive time, exclusive of the primary zone, and the tertiary zone is characterized by a 15 minute drive time, exclusive of the primary and secondary zones (see the figure adjacent).
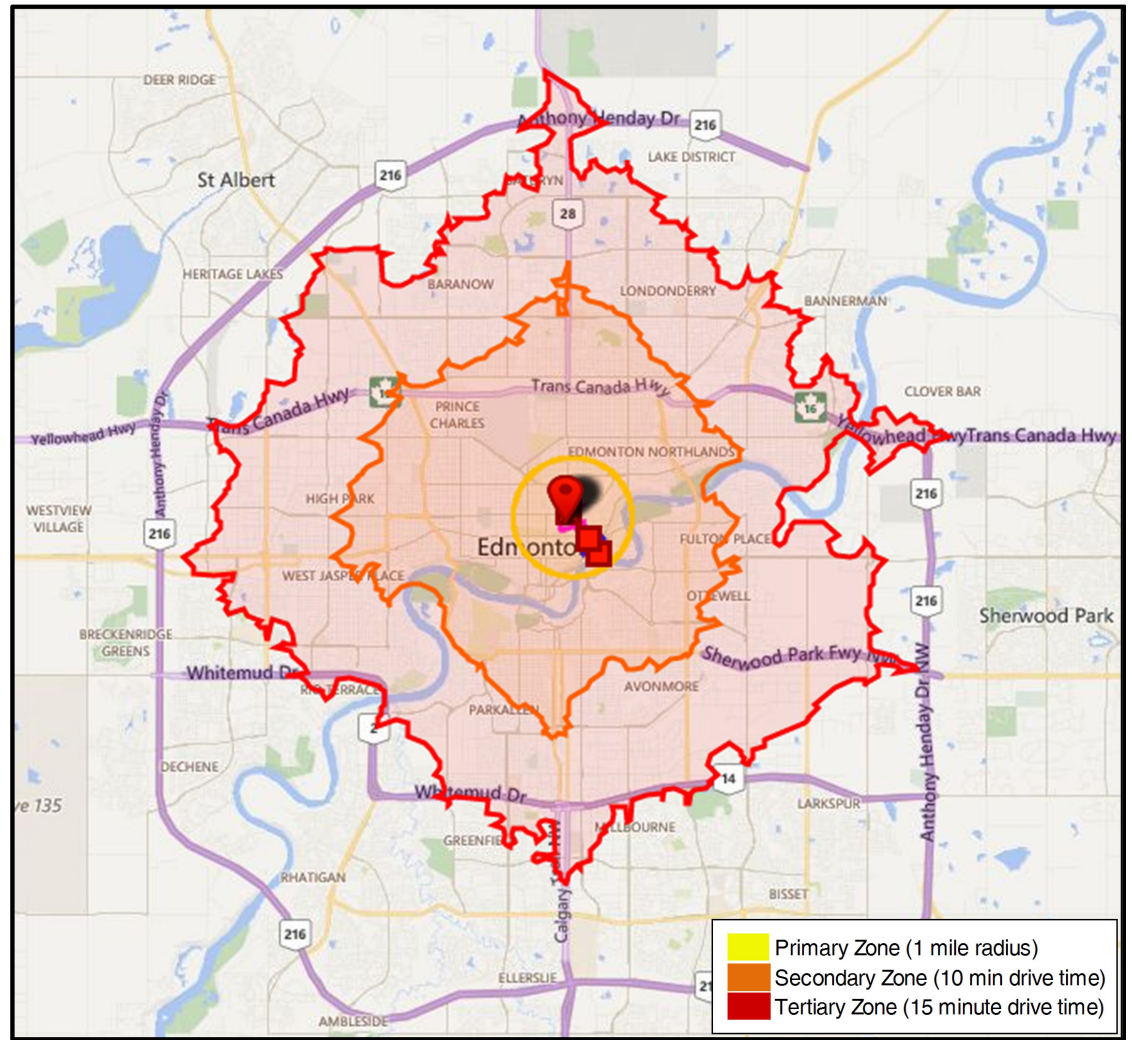

Figure 18: Retail Trade Zones

5.10.3. "Inflow" Sales Level

All other sales are anticipated to be "inflow" sales, sales that are a result of retail patronage by residents from outside of the trading area. There are typically three major origins of "inflow" sales, mainly: people who live outside of the trade area but occasionally shop in the trade area; people who work within the trade area but live outside of it; and tourists and visitors. In the case of the subject site, a large share of "inflow" sales will most likely be from people that are employed at offices in the surrounding downtown area, as well as visitors and tourists. Though, it is important to note that a portion of those employed at office space located within Chinatown or Downtown may also reside within the trade area. Additional "inflow" can be expected from those who travel to the area for the Royal Alexandra Hospital, the new Royal Alberta Museum and the ICE District, all major traffic generators.

The "inflow" factor for the retail categories in question generally ranges between 5% and 10%. These rates are derived with great care and relate to the trading area's delineation, particularly in terms of its geographic reach. For this study, the "inflow" is expected to be especially high for eating and drinking commercial uses, due to the study area's proximity to Downtown.

Population (persons)	HISTORICAL 2011	PROJECTED 2015	2020	2025	2030	Avg Annual Change
Primary Trade Zone	30,242	33,250	36,570	40,260	44,400	
Incremental Growth		3,008	3,320	3,690	4,140	745
Secondary Trade Zone	163,160	179,340	197,230	217,110	239,360	
Incremental Growth		16,180	17,890	19,880	22,250	4,011
Tertiary Trade Zone	250,692	275,570	303,060	333,610	367,820	
Incremental Growth		24,878	27,490	30,550	34,210	6,165
Total Trade Area	444,094	488,160	536,860	590,980	651,580	
Incremental Growth		44,066	48,700	54,120	60,600	10,920
Edmonton City	812,201	893,000	982,000	1,082,000	1,193,000	20,042
Edmonton CMA	1,159,869	1,400,000	1,542,000	1,690,000	1,833,000	35,428

Table 20: Trade Area & Trade Zones Population Forecast

5.10.4. Retail Market Potential

This section examines the market opportunities for various retail uses at the subject site. Given the expenditure figures and population projections discussed in the previous section, the anticipated trade area expenditures have been forecasted throughout the course of the study period. Expenditure figures are increased at a real rate of 1% per annum in order to account for anticipated growth in retail expenditures. It should be noted that this increase does not account for inflation; all figures are provided at real 2015 levels.

The expenditure figure for each retail trade zone, and for each retail category, is multiplied by the forecasted population for the corresponding trade zone to arrive at a total potential expenditure. This figure is applied to the subject site's anticipated market shares in each category and for each zone, which are derived with consideration of competition, demographic and economic factors. An "inflow" factor of 5% to 10% has generally been identified for the subject site, with the remaining 90% to 95% of sales driven by the population within the trade area. It is important to note that this study has not kept market shares constant. Market shares are anticipated to become stronger as the subject site is developed.

The table below summarizes the cumulative amount of additional retail space warranted in Chinatown over the study period. According to the forecast, Chinatown could support an additional 56,400 square feet of DSTM retail by 2030 under the medium growth and market share scenario.

Medium Scenario Warranted Floor Space (Sq. Ft.)	2015	2020	2025	2030
Department Store Type Merchandise (DSTM)	27,300	34,800	44,300	56,400
Service Commercial	7,900	10,100	12,800	16,400
Eating & Drinking	24,700	31,400	40,000	51,000
Supermarket & Other Grocery	36,300	46,200	58,700	74,900
Convenience Store	1,900	2,400	3,000	3,900
Specialty Food Store	1,300	1,600	2,100	2,600
Beer, Wine & Liquor	6,100	7,800	9,900	12,600
TOTAL OPPORTUNITY	105,500	134,300	170,800	217,800

Table 21: Summary of Retail Market Opportunities

You have to taste **culture** to understand i

6. CULTURAL ATTRACTION MARKETS

6.1. Cultural Attraction Market

6.1.1. Edmonton Tourism

AECOM reviewed tourism data available from Alberta Culture and Tourism over the last five years. Visitor statistics for Alberta are based on Statistics Canada's Travel Survey of Residents of Canada and the International Travel Survey. As reported by Alberta Culture and Tourism, 2012 is the most recent available year due to data processing time. Note that historic tourism volume estimates from 2008-2010 are not directly comparable to 2011-2012 due to a change in the survey methodology.

In 2012, the Edmonton area hosted 6.49 million total visitors, of which 2.89 million stayed at least one night in Edmonton. The average length of stay for all overnight visitors to the Edmonton area is 2.9 nights.

Note: Methodology change in 2011, prior years not comparable
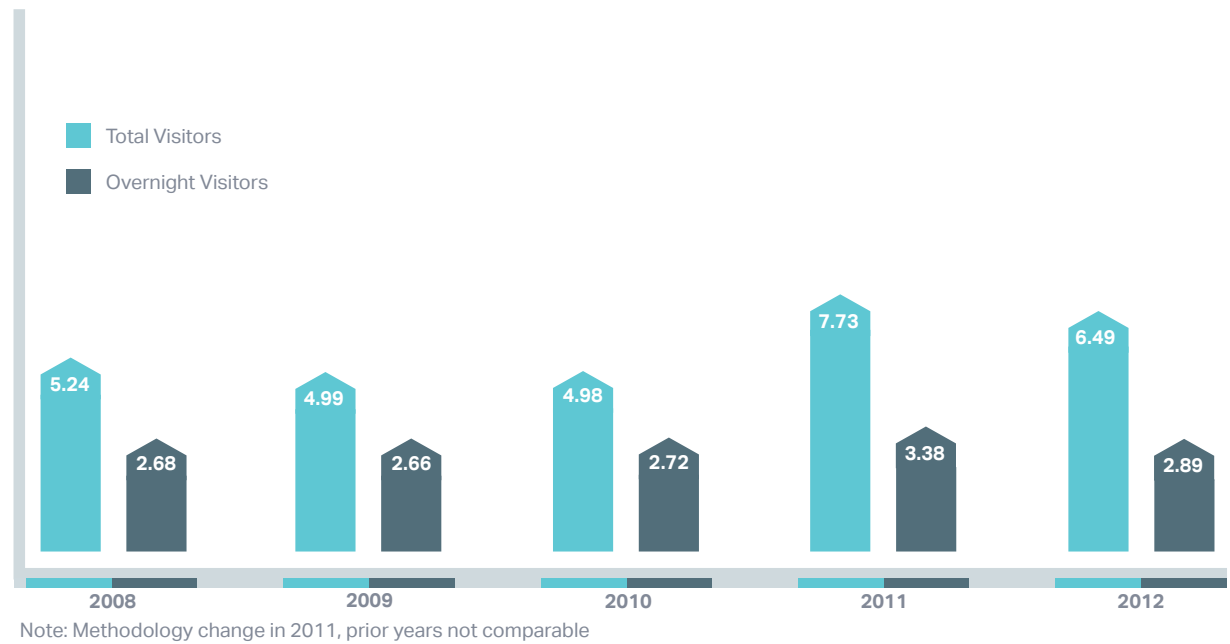
Figure 19: Edmonton Total Visitors, 2008-2012 (millions)

Visitors of all types to Edmonton were primarily Canadian travelers, with 84 percent from Alberta and 12 percent from elsewhere in Canada. Tourists from the United States and overseas were each only 2 percent of total.

Overnight visitors in the Edmonton area were primarily visiting friends and relatives (VFR) and pleasure travelers (48 percent to visit friends and relatives, 26 percent for pleasure). Business visitors comprised 15 percent of total overnight visitation.

Total Visitors by Origin, 2012

2%

2%

- United States
- Overseas
- Alberta
- Other Canada

12%

84%
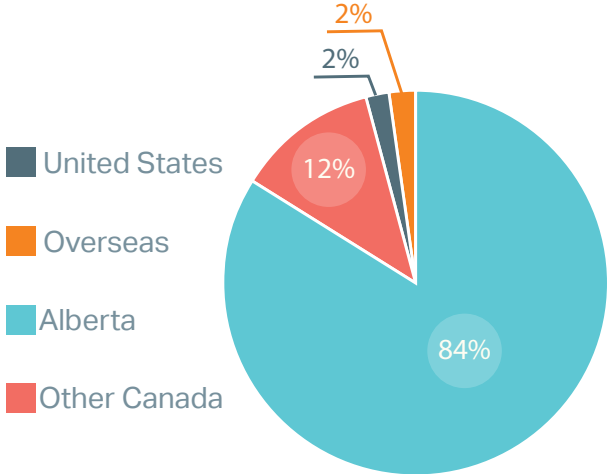
Overnight Visitors Purpose of Trip, 2012

- Pleasure
- Business
- Other
- VFR

26%

48%

15%

11%
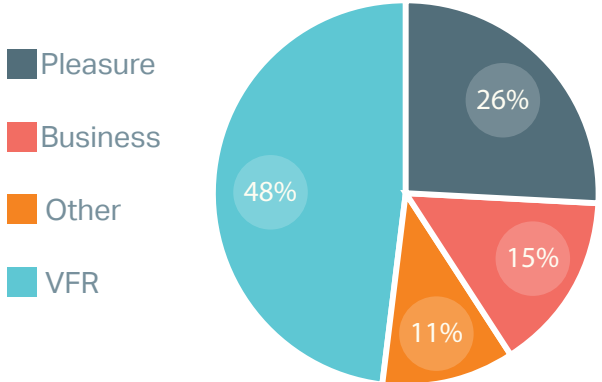
AECOM interviewed tourism officials in Edmonton with respect to trends, strategies, and the potential attraction of tourists to Edmonton. Key points are as follows:

- The primary marketing message Edmonton conveys to visitors is Edmonton is a place to visit multiple times, with year-round activities and events. The essence of the brand is a vibrant urban center in the wilderness, an urban area in Northern Canada, and the spirit of Edmonton as a place with activities and festival year-round.
- Edmonton is primarily a regional destination, attracting visitors for an urban experience in the northern-most metropolis in Canada.
- Many visitors are attracted to large big box stores.
- Air access to Edmonton is strong compared to cities of comparable size.
- Edmonton is also a gateway city, attracting international visitors going through to the Rockies or to the north.
- There is a fairly large meetings and conventions industry in Edmonton. Corporate business visitors are also part of the market, as the gas and oil industry brings strong visitation when the industry is doing well.
- Tourism is highly focused on sports, such as swimming and bicycle racing during the summer.
- The average stay is fairly short, at 2.3 nights. There are many people visiting friends and relatives, including the Chinese population and a large transient work population in the oil and gas industry that includes residents of camps as well as their friends and family who visit during their days off.

- Target markets for the tourism industry include short haul Canadians, long haul Canadians, California, Texas, United Kingdom, Germany, Holland, China, Australia, Japan, and South Korea.
- A major challenge for Edmonton is lack of tourism products; there are not sufficient cultural experiences for visitors.
- Opportunities include the large and growing hotel inventory, the new hockey and entertainment arena, strong air access, being an access point for aurora borealis, and the Northern Rockies.
- The tourism industry does not currently promote Chinatown as a destination, although individual events such as Chinese New Year are promoted. Chinatown is not currently viewed as ready to be a major tourism destination, as there are limited visitor experiences and cultural / tourism products.
- The tourism program of "Edmonton Original" would be a good fit for Chinatown.

6.1.2. Cultural Attractions Overview

Cultural destinations in the Edmonton market include a diverse mix of major institutions, outdoor /nature based attractions, smaller specialty museums, historic sites, and venues for the performing arts.

Major Institutions

- **TELUS World of Science** – Edmonton- Founded in the late 1970s, this science center includes an IMAX Theater, planetarium, and regularly hosts popular travelling exhibitions such as Indiana Jones & The Adventure of Archaeology, Star Wars, and Harry Potter. The IMAX Theater was renovated in 2013. Total exhibit area for the museum is over 100,000 square feet. This institution has the highest attendance of any cultural attraction in the market at 593,000 in 2014, translating to 5.4 visitors per exhibit square foot.

- **Art Gallery of Alberta**- Founded in 1924, the Art Gallery is the province's only museum dedicated exclusively to the presentation and preservation of arts and visual culture. The museum maintains a collection of over 6,000 works of art representing the development of Canadian art from the late 1800s to the present, with a particular emphasis on Western Canadian artists. The museum opened a new 85,000 square foot facility in 2010, which doubled the exhibit area and classroom space. The new facility includes a popular dining and events destination, ZINC which reports another 70,000 in attendance in addition to gallery admissions and events.

- **Royal Alberta Museum**- recently closed (December 2015) for expansion and relocation downtown to reopen by 2018. The new facility will be the largest museum in Western Canada, with over 400,000 gross square feet and more than 80,000 square feet dedicated to exhibitions. The total project cost is $375.5 million, funded by the Alberta government ($253 million) and federal government ($122.5 million). Attendance in the last year was approximately 160,000 and well below regular attendance levels of 400,000 due to access challenges, limited school programs and no temporary exhibition offerings. In the new downtown location, the museum expects attendance will return to historic levels of 400,000 after an opening year surge. Attendance is driven by the resident market with an estimated 80 percent of total visitation from within one hour of downtown. School groups are an important visitor segment (approximately 50,000 historically and expected to increase to 100,000 in the new facility). The Royal Alberta Museum is owned and operated by the province.

Edmonton has a number of nature-oriented attractions, many of which are outdoor experiences.

- **Edmonton Valley Zoo**- this City owned/operated Zoo features over 300 animal species and is open year round.

- **Muttart Conservatory** - these iconic pyramids were designed by Peter Hemingway in 1976 and renovated in 2009. The Conservatory includes 3 biomes featuring the plant science of western Canada and a fourth with changing interpretive exhibits. This City owned and operated venue is popular for dining and events as well.

- **Fort Edmonton Park** - this 158 acre park for living history features four periods: 1846 fur trade fort, 1885 settlement period, 1905 municipal period, and 1920 city life. The Park is currently fundraising to update and expand attractions as envisioned in the 2010 Masterplan.

- **John Janzen Nature Center** - nature center located in the heart of Edmonton's River Valley.

- **Devonian Botanic Garden** - a 240-acre property located 15 minutes southwest of Edmonton, with cultivated gardens and plant collections, greenhouses, and a nature trail system. The Garden is open seasonally and operated by University of Alberta.

Major Institutions	Type	Adult Admission	Child Admission	Annual Attendance
Royal Alberta Museum	Natural history museum	$11.00	$5.00	400,000
Edmonton Valley Zoo	Zoo	$13.25	$8.00	358,000
Fort Edmonton Park	Living history attraction	$26.20	$20.90	250,000
Muttart Conservatory	Nature attraction	$12.50	$6.50	129,000
John Janzen Nature Centre	Nature attraction	$3-$7.50	$3.00	79,000
Devonian Botanic Garden	Botanic garden	$13.50	$5.00	74,000
Art Gallery of Alberta	Art museum	$12.50	$8.50	65,000
Average		**$15.56**	**$8.79**	**244,000**
Median		**$13.25**	**$7.25**	**190,000**

Table 22: Key Factors at Major Cultural Attractions in Edmonton

Specialty Museums / Historic Sites

Specialty museums in the Edmonton market are a diverse mix of historic sites, museums of industry and cultural centers. Edmonton has a rich history of Ukrainian immigrants, whose stories are told in the Ukrainian Cultural Heritage Village, a living history museums with seasonal operations 25 minutes east of Edmonton and the future Ukrainian Canadian Archives and Museums of Alberta. The Lodge Hotel and Brighton Block buildings along Jasper Avenue are currently under restoration as the new home of the Ukrainian-Canadian Archives and Museum of Alberta, which anticipates up to 50,000 visitors at opening. One quarter of the building restoration project is complete, with the remainder waiting funding.

Specialty Museums	Type	Adult Admission	Child Admission
Alberta Aviation Museum	Aviation museum	$10	$7
Alberta Legislature Building	Historic site	Free	Free
Alberta Railway Museum	Railway museum	$5	$2
John Walter Museum	Historic house in Kinsmen Park	Free	Free
Loyal Edmonton Regiment Museum	Military museum	Free	Free
Rutherford House	Historic house	$6	$4
Ukrainian Canadian Archives and Museums of Alberta	Ethnic museum / archive	Free	Free
Ukrainian Cultural Heritage Village	Ethnic living history museum	$12	$6

Table 23: Specialty Cultural Attractions in Edmonton

Performing Arts Venues

Edmonton's major indoor venues for performing arts, including classical music and theatre arts, are both located downtown. Built in 1997, the Francis Winspear Centre for Music is home to the Edmonton Symphony Orchestra and Pro Coro Canada with a seating capacity of 1,716. The Citadel Theatre, just off Churchill Square, includes a variety of performance venues and the Foote Theatre School.

Edmonton is also home to one of the region's largest outdoor performance venues, the Heritage Amphitheatre. This venue's distinctive white canopy offers excellent acoustics with an open view of Hawrelak Park. There are 1,100 fixed seats and additional capacity for 2,900 on the surrounding grass.

Festivals

Edmonton, known as "Festival City", is host to dozens of annual cultural festivals, including:

- Canadian Birkebeiner Ski Festival- Cooking Lake - Blackfoot Provincial Recreation Area, The Ukrainian Cultural Heritage Village and Elk Island National Park (February)
- Cariwest Caribbean Arts Festival- City Hall and Churchill Square (August)
- Deep Freeze: A Byzantine Winter Festival- 118 Avenue NW & 91 Street (January)
- Dreamspeakers International Film Festival- Various venues (October)
- Edmonton Blues Festival- Heritage Amphitheatre (August)
- Edmonton Comedy Festival- Various venues (October)
- Edmonton Dragon Boat Festival- North Saskatchewan River Valley (August)

- Edmonton Folk Music Festival- Gallagher Park (August)
- Edmonton Fringe Festival- Old Strathcona and Whyte Avenue (August)
- Edmonton International Film Festival- Various venues (October)
- Edmonton Pride Festival- Old Strathcona and Whyte Avenue (June)
- Edmonton Rock Music Festival- Hawrelak Park (August)
- Farmfair International- Rexall Place (November)
- Festival of Light- Edmonton Valley Zoo (February)
- Festival of Trees- Shaw Conference Centre (November)
- Flying Canoe Volant- Mill Creek Ravine (February)
- Freewill Shakespeare Festival- Heritage Amphitheatre (June – July)
- Ice Castles- Hawrelak Park (January – March)
- Ice on Whyte Festival- Old Strathcona (January)
- International Children's Festival- St. Albert Place Promenade (May)
- Interstellar Rodeo- Heritage Amphitheatre (July)
- Kaleido Family Arts Festival- 118 Avenue NW, between 90 & 94 street (September)
- K-Days- Northlands Park (July)
- Luminaria- Devonian Botanic Gardens (December)
- Northwestfest- Various venues (May)
- Sand on Whyte- Old Strathcona and Whyte Avenue (July)
- Servus Heritage Festival- Hawrelak Park (July)
- Silver Skate Festival- Hawrelak Park (February)
- Sonic Boom- Borden Park (September)
- TALES Storytelling Festival- Old Strathcona and Whyte Avenue (May)
- Taste of Edmonton- City Hall and Churchill Square (July)
- The Works Art & Design Festival- City Hall and Churchill Square (June)

Neighborhood Arts Organizations and Key Projects

In addition to the museum relocation projects mentioned above, the downtown arts district has a wide range of arts activity and ongoing development, including the following organizations and projects:

- Mile Zero Dance company- Experimental dance company and studio
- iHuman Youth Society- An arts center for troubled youth
- The Creative Clubhouse- An arts organization focused on connecting communities in the urban setting through a variety of graffiti programs and music events
- The Drawing Room Studios and Salon- A co-work and exhibition space for interdisciplinary arts and community
- Quarters Arts - Promotes the arts in the Quarters Downtown and Boyle Street neighborhood
- The Aviary - An arts focused concert venue closed due to LRT construction; planning relocation to Norwood Boulevard
- Artist Quarters (corner of 102A Ave & 96 St) - Partnership of Arts Habitat Edmonton, Artists Urban Village and City for affordable live/work housing for artists. Project includes The Residences with over 60 units plus communal spaces including a kitchen /dining room, library, workshop and garden and The Podium with office and performance spaces, and facilities for anchor arts organizations.

Conclusions

- Edmonton was host to approximately 2.5 million overnight leisure visitors in 2012 and is primarily a regional destination for residents of Alberta.

- Chinatown is not currently viewed as a tourism destination due to a lack of visitor experiences and cultural offerings that are accessible to tourists.

- Attendance to major cultural institutions ranges from 65,000 to nearly 600,000, with an average of 244,000. Admission to these facilities ranges from $11 to $26.20 for adults, though most rates are less than $14.

- Among the eight major cultural destinations, more than half are nature-based or outdoor experiences. The marketing orientation and branding for Edmonton's tourist industry is outdoorsy and nature-experience focused. Edmonton is a popular destination for outdoor enthusiasts and branded as an urban destination in the wilderness.

- Edmonton also has an extensive number of festivals and programming year-round.

- There are a number of smaller arts organizations as part of the downtown arts district that may have the potential to collaborate as part of Chinatown art and culture strategies.

Practice is the best of all instruments.

7. BEST PRACTICE ANALYSIS

7.1. Overview

There are many lessons to be learned from other communities' successes. Sharing of best cultural planning practices will assist Edmonton's Chinatown community and the City in its future growth and stability. Borrowing strategies from other North American communities will be helpful in formulating strategies for Edmonton, as well as carving a path for the future implementation, while recognizing strategies will have to be repackaged and adapted to suit Edmonton's unique Chinatown. As part of this review, it is vital to review not only those most well-known gateway Chinatown's, such as Vancouver and San Francisco, but also non-coastal Chinatowns which have evolved in a similar fashion to Edmonton and also face different growth complexities and challenges such as colder climates, smaller populations, and less dense development patterns.

The selection of communities of best practice will be selected using a number of criteria, to ensure a measurable and quantifiable comparison as outlined in Table 24 As shown, the criteria are weighted according to importance and include three major categories:

• City factors
• District similarities
• Strategies

The combination of criteria in these three categories will help ensure that a balance between the need to select locations with a similar context to Edmonton Chinatown and the importance of selecting communities that have achieved some success is considered.

7.1.1. City Factors

The first set of criteria includes a comparison of the cities in which the districts are located. While cities do not need to be exactly comparable, it is important to consider factors such as resident and tourist market size, location relative to the coast, and location in Canada versus the United States in an effort to ensure that lessons learned are applicable and relevant.

7.1.2. District Similarities

The combination of criteria in these three categories will help ensure that a balance between the need to select locations with a similar context to Edmonton Chinatown and the importance of selecting communities that have achieved some success is considered.

7.1.3. District Strategies

Finally, while it is important to consider similarities in city or district characteristics, it is also important to select Chinatowns that have successfully implemented economic development strategies and have organizations in the community that are active in conducting economic development and partnering with the local public agency to implement economic development projects and priorities.

EVALUATION CRITERIA	Possible Points	Calgary Chinatown	Ottawa Chinatown	Vancouver Chinatown	Toronto Chinatown	San Francisco Chinatown	Boston Chinatown	Seattle International District	Chicago Chinatown	Cleveland Asiatown
CITY CRITERIA										
City Population	2	2	2	2	1	2	2	2	1	1
% Asian	2	2	2	1	1	1	2	2	2	1
Annual No. of Overnight Tourists	3	3	3	2	2	1	1	1	1	2
Coastal / Inland	2	2	2	1	2	1	1	1	2	2
Located in Canada	1	1	1	1	1	0	0	0	0	0
Subtotal	10	10	10	7	7	5	6	6	6	6
DISTRICT CRITERIA										
Population	3	3	3	3	3	1	3	3	2	3
Population Density per hectare	2	2	2	2	1	1	2	1	2	2
% Chinese	2	2	2	1	2	1	2	2	1	2
Subtotal	7	7	7	6	6	3	7	6	5	7
STRATEGIES /OTHER CONSIDERATIONS										
Implementation / existence of strategies with success	5	1	1	4	2	5	4	3	5	4
Presence of active community / development organizations	5	2	1	4	2	5	4	3	5	3
Accessibility of information	5	1	1	5	1	5	3	3	5	3
Subtotal	15	4	3	13	5	15	11	9	15	10
GRAND TOTAL	**32**	**21**	**20**	**26**	**18**	**23**	**24**	**21**	**26**	**23**
By Category										
Similarities	17	17	17	13	13	8	13	12	11	13
Success / strategies	15	4	3	13	5	15	11	9	15	10

Table 24: Best Practice Evaluation Matrix

7.2. Case Studies

Boston Chinatown

The goal of the 2010 Chinatown Master Plan was to identify, create and prepare community members and businesses for economic development opportunities which will serve the needs of local residents, the regional Asian American community, and neighboring districts. Strategies in Boston focus on:

- Chinatown Master Plan focused on preparing businesses and residents for economic development opportunities
- Job and career training
- Incubator space
- Preservation and development of affordable housing
- Promote Chinatown through tourism partnerships
- Broaden outreach to larger population
- Centralize information on activities, stores, shops
- Develop visitor resources

Chicago Chinatown

Unlike other Chinatowns in the United States, Chicago's Chinatown residential population has been growing, with an increase of over 26% between 2000 and 2010. These recommended strategies from the Chinatown Community Vision Plan will ensure that this community continues to thrive. Strategies in Chicago focus on:

- Growing residential population, with an increase of over 26% between 2000 and 2010
- Employment and workforce development
- Training resources for small businesses
- Work with cultural attractions, tourism organizations, restaurants and businesses to create events to draw people to Chinatown
- Physical development of retail and recreational amenities funded by TIF (Tax Increment Financing)

Cleveland Chinatown

The City of Cleveland chose to stimulate economic development through streetscape improvements while the neighborhood was undergoing revitalization through private investment. Original Chinatown was slowly disappearing, while other non-Chinese Asian communities started expanding. Asiatown Cleveland was developed as a branding and marketing campaign building on the growing prominence of the pan-Asian community in this area Multiphase Asiatown Master Planning Process sponsored by Councilman Jeffrey Johnson and co-sponsored by the St. Claire Superior Development Corporation. Strategies in Cleveland focus on:

- Facilitating more mixed-use in the future
- Creating main street and a strong sense of place
- Increased multi-modal accessibility of neighbourhood
- Streetscape improvements strategies incorporated Asian-inspired, culturally relevant public art and feature Asian art elements on benches, crosswalks, bus shelters, signage, bike racks, banners, lighting.

San Francisco Chinatown

The economy within San Francisco's Chinatown has declined steadily over the past decade and has not kept pace with the City's larger economic success. The Chinatown Economic Action Plan explored how to harness community and City resources to improve economic conditions in Chinatown.

Strategies in San Francisco focus on:

- Business development for small businesses serving tourists
- Affordable housing preservation and development
- Community development
- Alleyway improvement project – turned challenging physical conditions into assets
- Transportation linkages – Central Subway
- Major events, festivals, and ongoing regular activities
- Improvement of public assembly spaces
- Signature chef restaurant recruitment
- Parking / shuttle program
- Engagement of public relations professional

Vancouver Chinatown

Vancouver's Council adopted Chinatown Vision 2002, Chinatown Community Plan, and Neighbourhood Plan and Economic Revitalization Strategy. Vancouver's Chinatown received national recognition of the district's rich cultural heritage in 2011 when the Minister of the Environment designated it as a Historic Site. Strategies for Vancouver focus on:

- Diversify and intensify retail and commercial activities to create thriving business district
- Restore and maintain historic character of built environment as a lever to enhance tourism, draw investment and sustain long term economic viability
- Create vibrant public spaces
- Provide financing and incentives to leverage additional investment for restoring buildings
- Support local arts, cultural organizations and societies, heritage groups in programmingMajor events, festivals, and ongoing regular activities
- Laneway revitalization, clean up of public spaces, allowing temporary events and installations
- Develop resource kit for tour guides on how to feature and promote Chinatown.
- Promote residential intensification to increase demand for local services

7.2.1. Case Study Summary: Key Strategies

As North American Chinatown's share a common history, culture, development pattern, they also share a similar revitalization and renewal. The following are key strategies found across the case studies:

Increase Population

- Maintain existing and develop additional affordable and senior housing
- Promote residential intensification to increase demand for local services
- Development corporations are one mechanism

Business Environment

- Small business assistance to improve viability of retail tenants
- Diversify and intensify retail and commercial activities to create thriving business district.

Programming & Tourism

- Festivals, night markets, regular programming, partnerships with artists
- Resource kits for tour guides on how to feature and promote Chinatown
- Create signature projects or ongoing cultural programs.

Urban Design

- Elements of Chinese art and symbolism in urban design
- Beautification and intensification of Chinatown's unique alleyways, ideally to be used for business activity – turn physical challenges into assets
- Improve transit options

7.2.2. Case Study Summary: Funding Mechanisms

Funding is a critical element to an economic development plan and its implementation. During the case studies, various funding mechanism were identified:

Community Development Corporation

• Development corporations to generate profit from land redevelopment for reallocation into arts, cultural, district promotional activity

Municipal

• Facade improvement programs
• Infrastructure improvements
• Urban design/streetscaping
• Staff resources & support
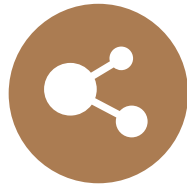
Other Orders of Government

• Heritage building preservation grants
• Arts & Cultural program grants
• Training & Education
• Tourism boards & Chambers of Commerce promotional materials

Private

• Philathropy
• Business & development community

7.2.3. Case Study Summary: Key Partners

Implementation of the Edmonton Chinatown Economic Development Plan is heavily tied to the roles and responsibilities outlined to each stakeholder and how they view and act on their role as part of revitalization and renewal efforts for Chinatown. During the case studies, various key partners were identified:

Increase Population
- City & State Housing Agencies
- Private Developers
- Community Development Corporation

Business Environment
- City Economic Development Funding and Agencies
- Chamber of Commerce
- Non-profit organizations
- Community and other colleges

Tourism & Programming
- Local Tourism Boards
- Nonprofit cultural organizations
- Chinatown Business Association
- Private Tour Providers

Urban Design
- City planning agencies
- Private Developers
- Department of Transportation
- Nonprofit organizations

Without **strategy**, execution is aimless.
Without execution, strategy is useless.

8. ECONOMIC STRATEGIES

8.1. Strategy Overview

The Edmonton Chinatown Economic Development Plan focuses on four umbrella strategies that will result in a number of underlying implementation actions over the course of the next 15 years. These strategies are encompassed in the development model and defined by the newly emerging need for a Chinatown economic development zone as illustrated in the adjacent graphic. The roles, responsibilities, and timelines for these strategies are outlined with the implementation section of this report.

Maintaining Physical Assets

Improving Safety & Security

Economic Development Zone

Establishing Implementation Models

Creation of Destination

8.2. Economic Development Zone

Edmonton's Chinatown is twice the size of San Francisco's and four times bigger than Vancouver's with only 25% to 50% of the metro area population

Scale and connectivity between both north and south Chinatown's has poised a significant challenge to the community over the years. Due to the previous migration of Chinatown commerce from its original location along 102 Avenue NW to its current location concentrated along 97th Street, Edmonton's Chinatown as a viable economic and culturally identifiable district has become dispersed. While cultural connectivity is still strong between the two locales, the area has experienced challenges in reaching a critical mass and focus for investment and renewal. This is compounded by an absence of wayfinding between north and south Chinatown and accessibility/walkability barriers such as fragmented low density development, inconsistent infrastructure, and the 97th Street bridge and underpass.

Key Findings:

- Currently two geographic areas that serve different functions
- Need to focus investment to have maximum impact on economic development
- Not feasible in the short or medium term to connect the two areas physically – the market won't support scale of development
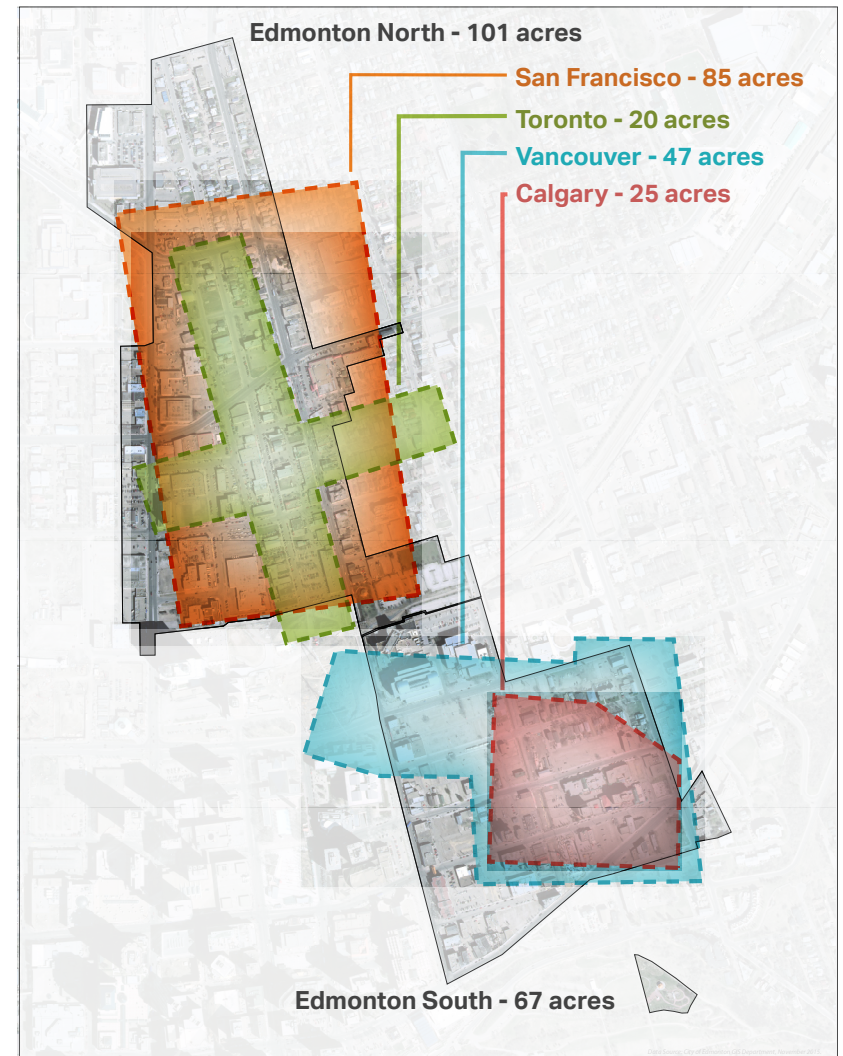- Chinatowns require culture and commerce to flourish, ideally integrated into a concentrated area

Figure 20: Chinatown Scale Comparison

- Edmonton North - 101 acres
- San Francisco - 85 acres
- Toronto - 20 acres
- Vancouver - 47 acres
- Calgary - 25 acres
- Edmonton South - 67 acres

8.2.1. Recommendations:

Boundary/Scale
- Define and establish an economic zone boundary to focus renewal efforts for Chinatown as a promotable desintation
- Focus all immediate economic development efforts on Chinatown North (5-10 years)
- Chinatown South & Garden should be promoted through tours, public art, The Quarter's Plan development.

Economic Development
- Prepare an economic development corporation study for Chinatown & potentially the broader City in efforts to increase redevelopment and increase commercial and residential building in the area
- The Chinatown BRZ prepare a Strategy Plan outline strategies to address marketing, promotion, to business diversification and training, tourism and event planning
- Prepare and identify high priority sites for redevelopment that are currently underutilized or vacant. These could include large surface parking lots, the vacant Remand Center.

Increase Residential Population
- Prepare a report on methods and policies to attract and increase redevelopment in Chinatown, such as potential policy interventions like tax abatements, tax incremental financing structures.

Chinatown North
- Focus of economic development in short and medium term
- Allows for concentration of resources in smaller area with greater return on investment

Chinatown South
- Historic roots of Chinatown
- Quarters Plan will result in change, need to ensure that it will support the cultural node
- Many ways to commemorate these historic roots – urban design, public art.

Chinatown Garden
- High quality cultural attraction with growth potential
- Strategies to connect with Chinatown through marketing, programming, and possibly a smaller secondary attraction or marketing piece

8.3. Physical Assets

Chinatown has a number of smaller design features that contribute to its overall character and cultural identity, however, it lacks a cohesive approach to the overall look and feel

The City of Edmonton with the community has championed a number of urban design efforts, façade improvement programs, and infrastructure upgrades successfully over the last 15 years. From planned streetscaping for 97th Street, to streetscaping improvements to 106 and 107 Avenue, to a large business uptake in the façade program, Chinatown is seeing a number of positive physical improvements in the area.

While urban design has been a key focus for City investment, there is an underlying aspiration to create a cohesive, unified design approach that can be easily experienced, appreciated and understood by visitors and residents alike. For example, greater consideration of the interfaces between both private and public realms, as accomplished through building façades and articulation, material usage, historical building preservation, street furniture, lighting, signage and public art, is needed reinforce the identity of Chinatown.

Key Findings:

Mary Burlie Park
- Tremendous potential for renewal and revitalization.
- Place for celebrations

Chinese Garden
- Tremendous asset, potential to be unique visitor destination
- Physically separated from Chinatown
- Opportunities for joint marketing / programming

97 Street
- Main retail core
- Walking / pedestrian area
- Urban design focused here
- Maintain retail on ground floors, focus on vacant lots
- Focus cleanup efforts

101 Street
- Secondary retail core areas
- Major entryway and travel corridor in and out of Downtown and the new Ice District.
- Larger parcels – opportunity for bigger mixed-use, residential projects and attractions

97 Street Rail Bridge
- Heritage - last rail crossing in the City
- Connection east to west: bike lane and pedestrian corridor
- Opportunity for a brilliant entranceway to Chinatown
- Proximity to RAM and opportunity for Mary Burlie Park reconfiguration
- Opportunity to partner with area developers
- Key wayfinding feature that could draw visitors

Harbin Gate
- Symbol of relationship and of celebration of partnership and friendship/kinship
- Assets should be complimentary to the focused zone
- Chinatown Gate normally defines entrance to business district

8.3.1. Recommendations:

Access/Connectivity
- Complete a pedestrian/cycling count in high volume traffic areas of Chinatown to assess the need for targeted wayfinding and urban design investment areas
- Complete a pedestrian/cycling linkage on the old Canadian National (CN) rail right-of-way and 97th Street Bridge to increase connectivity between Chinatown and larger (re)developments such as the Ice District, possible future LRT Station, Royal Alberta Museum.
- Identify key pedestrian corridors from the Royal Alexandra Hospital to Chinatown with the aim to improve access and wayfinding between the two areas
- Evaluate existing transit service to reinforce Chinatown as a destination
- Evaluate the potential for a future LRT Chinatown/ McCauley Station during the redevelopment of the Remand Center

Placemaking/Identity
- Work with the owner of the 97th Bridge to discuss options for branding the bridge as a Chinatown entry and ensure pedestrian access across
- Work with the community to identify a suitable future location of the Harbin Gate
- Prepare a maintenance report for the 107 Street Gate of Happy Arrival and identify annual and longer term maintenance schedules and funding to ensure its upkeep
- Work with cultural institutions, tourism boards, such as the Royal Alberta Museum and Art Galley of Alberta to promote and identify wayfinding elements that will further establish Chinatown as a destination for tourists
  - Strategies to add, enhance and activate green spaces & gathering places within the community (parks, squares, transit station area, gateway/entrance to Chinatown)

Heritage/Culture
- Conduct a historical building inventory to assess buildings that have cultural significance and contribute to the overall identity of Chinatown. These could include family association buildings, business facades.

8.4. Safety and Security

It's hard to promote Chinatown to visitors, when safety is a concern

A reoccurring sentiment in conversations with the community is the challenges business owners and residents experience with safety and security and how that impacts the promotion and overall perception of area to visitors. Safety is viewed as greatly impacted by the high clustering of social agencies in the area, serving clients in need of everything from daily food service to overnight sheltering.

Key Findings:

- Safety and security was a core challenge identified by the community through the various community engagements
- Business owners find it challenging to manage and mitigate the impacts of a large homeless population in the area and there are costs associated with increased maintenance as a result
- Businesses operating hours have not been negatively impacted by the perception of safety in a large way, 54% of businesses continue to serve clients in the evening and late evening
- There is a concentration of social agencies in the area, greater than 20, that is contributing to the overall lower perception of safety in the area

01 Social Service Agencies

02 Increased Business Challenges and Costs

03 Perception of area as unsafe

04 Lack of critical mass and activity compounds these problems

Strategy: Safety and Security

The Challenge

A Call to Action is required for all levels of community and government to work with agencies and police on managing safety and security issues in Chinatown.

8.4.1. Recommendations:

- Prepare a list of 'immediate" safety action items to be implemented such as:
  - Repair existing lighting and enhance lighting
  - Increase police presence by foot or bike
  - Ensure quick maintenance and clean-up of street garbage & parks
  - Host a meeting with sheltering groups to discuss challenges with exterior building queuing
  - Hire community ambassadors to help maintain, patrol and provide information to those seeking social services programs & support
- Install a public washroom in a highly visible area and ensure a regular maintenance schedule is followed
- Commence inter-agency monthly meetings with social agencies, BRZ, City and community leagues to discuss services, partnership and to address issues/conflicts that may arise between businesses, residents, and their cliental
- Prepare a feasibility study on piloting a community support workers 'outreach' program
- Prepare a report on the impacts of concentrating social agencies and incentives to encourage spatial dispersion

Physical Improvements
- Lighting
- Work to fill vacant spaces and lots
- Façade improvements and upkeep

Policing / Security
- CPTED
- Community Ambassadors
- In Language Services

Maintenance and Services
- Regular sidewalk power washing
- Install Public Washroom
- Garbage and street cleaning

Organizational
- Work with social service organizations
- Restructure lines and how services are provided
- Community task force

8.5. Create a Destination

Edmonton has many physical assets that contribute to creating an identifiable Chinatown cultural shopping district, but it lacks a signature attraction and collective approach to draw visitors to the area.

Experiential shopping and cultural districts are increasing in popularity among visitors and patrons. Merchants have recognized the value of experiential marketing: putting the shopper in an immersive environment and offering a host of product options to meet their needs and lifestyles. Simply put, the better the shopping experience the higher the profit generation.

As such, cultural districts such as Edmonton's Chinatown are well positioned to deliver and capitalize on their ability to offer patrons an authentic shopping and cultural experience. Chinatown is one-of-a-kind among the various shopping streets and fare offered in the City. Chinatown should aim to promote, market and harness this competitive advantage.

Key Findings:

- Successful Chinatowns all over the world are destinations for residents and tourists
- Mix of small scale pedestrian environment experiences and larger more formal attractions
- Includes retail experiences, cultural attractions, festivals, programming, walking tours, food exploration, and interpreted or non-interpreted visits to Chinese herbal shops, food tours (i.e. fortune cookie factory, homemade dumpling shop), temples, music, or other small specialty experiences

8.5.1. Recommendations:

- Prepare promotional materials for Chinatown, such as maps, websites, pamphlets.
- Increase regular cultural programming in Chinatown through events, festivals, artist-in-residence programs.
- Work with tourism merchants and agencies to prepare speciality tourism packages for visitors
- Explore the potential to develop a significant cultural attraction in Chinatown
- Prepare a feasibility study for the installation of a future North Chinatown LRT Station

8.6. Implementation Models

A plan is just a plan, unless participants are willing to action the aspirations through hard work and continued commitment.

A governance structure or vehicle for implementation is required to transition recommendations into actions and tangible outcomes. Economic development will be propelled through a collaborative effort working under a single governance structure, overseeing and focusing resources to ensure the greatest results. Although there are already many stakeholder groups and organizations, such as the Business Revitalization Zone, Cultural Associations, working to create a better Chinatown and promote and preserve its culture and rich history, many of these stakeholders have identified that City-wide and expanded participation is required to achieve the aspirations of the community.

Key Findings:

- Current economic development structure has gaps in ability accomplish these strategies
- Active groups and individuals, but not enough integration of efforts; relies on informal personal connections
- New structure is needed to:
  - Increase capacity
  - Bring additional resources to Chinatown
  - Increase partnerships with external organization
  - Integrate efforts of individuals and organizations

BRZ / Business Community

Culture & Social Organizations

Chinatown Economic Development Group

As illustrated in the best practice section of the report, Chinatown's across North American have employed Economic Development Groups as one avenue to streamlining their approach and management of Chinatown. Communities from Vancouver to San Francisco, have all engaged in the formalization of a implementation model. Over time, these governance models can evolve from an engaged stakeholder group/board into an economic development corporation and financial engine for continued growth and investment.

The first step for Edmonton Chinatown will be to convene a meeting, engaging a larger cast of participants than the past, from the builders to suburban cultural associations to youth entrepreneurs. It is important to gather the community to discuss the model for economic development, defining roles and responsibilities, strategy progress and monitoring successes, identifying financial supports, and establishing a framework for stakeholders. Establishing clear timelines for implementation, communications, and distinguishing who will be responsible for certain strategy progress will be critical.

While bilateral action with the city is a fundamental part of the Chinatown Economic Development Plan, successful Chinatown developments in North America have demonstrated the need for community lead initiatives. This approach is similarly adopted in this plan, emphasizing the role and importance of the community as a driver of positive economic change within Chinatown.

Chinatown Economic Development Group

- BIA
- Business Community
- Developers
- City
- Cultural Organizations
- Social Agencies
- Community Leagues
- Tourism
- Youth
- Other Stakeholders

8.6.1. Recommendations:

Leadership & Governance

- The City to work with community organizations to host a kick-off meeting to discuss the establishment of a Chinatown Economic Development Group

- The City of Edmonton review the funding of a implementation planner to support the Chinatown Economic Development Group

- Investigate the potential of adding non-voting board members to the Chinatown BIA to encourage and foster additional participation and communication between the business community and other Chinatown stakeholders

The journey of a thousand miles begins with a *single step.*
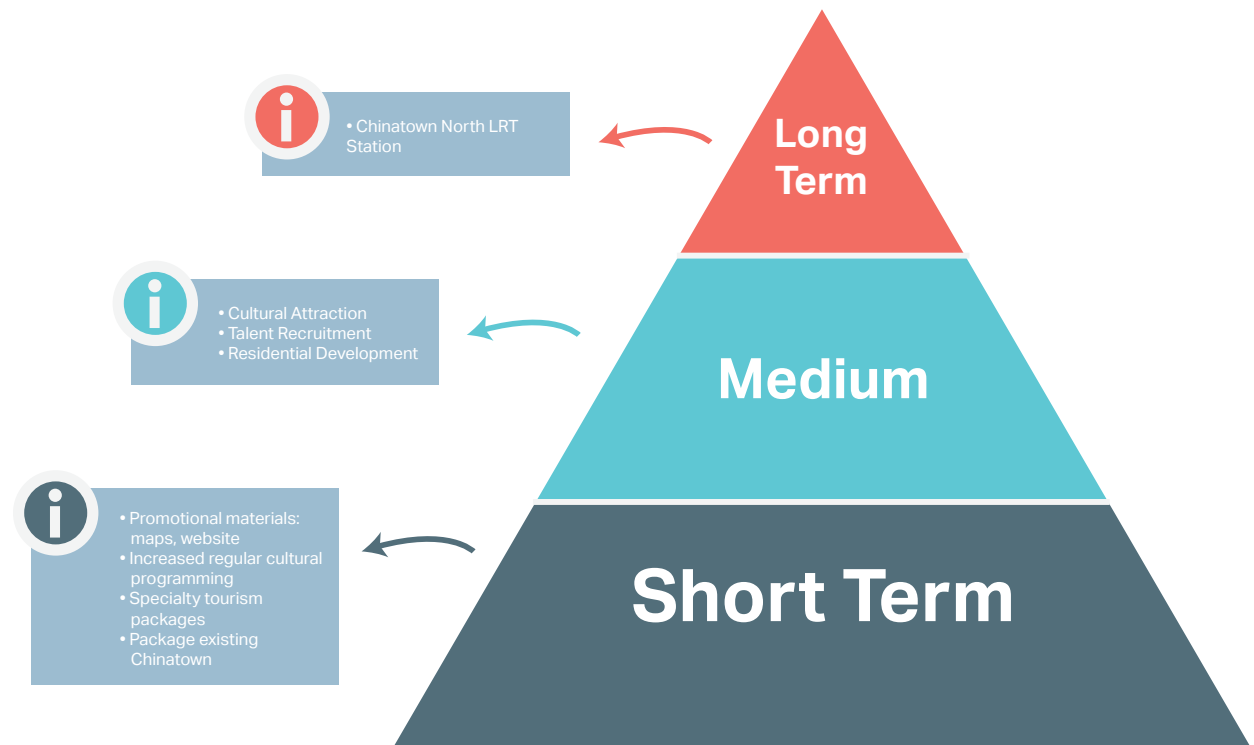
9. IMPLEMENTATION

9.1. Implementation Overview

An Economic Development Plan is a long term guiding document with an estimated horizon of up to 15 years to achieve full implementation. Some recommendations may come to fruition in the first year of plan adoption, while some may take much longer to accomplish fully. Below is a table of all strategy recommendations, their associated timeline, and roles and responsibilities for implementation.

Timing – Indicates when an action should start, does not define the end date as some actions will take years to fully realize

Responsibility – Identifies the lead and support organizations to start recommendation action & tasks associated

Recommendation – Represents a broad range of actions that may result in a number of steps to accomplish

- Chinatown North LRT Station

- Cultural Attraction
- Talent Recruitment
- Residential Development

- Promotional materials: maps, website
- Increased regular cultural programming
- Specialty tourism packages
- Package existing Chinatown

Long Term

Medium

Short Term

Implementation Roles

Community Roles

Inclusive community-led approaches to local economic development draw upon the experience and knowledge of neighbourhood stakeholders in order to achieve and bring about real change. These local stakeholders can be empowered by the guiding actions of the City in order to positively influence the direction the Economic Development of Chinatown takes. To date, the Chinatown Business Revitalization Zone and Cultural Associations of the Chinatown play a critical role in identifying local issues important to residents and improving the area through community action - however, during the consultation for this plan, the community has identified the need to go beyond traditional and established stakeholders to engage in a dialogue about its future growth and development. Chinatown represents a more diverse business community and new leaders are emerging which are important components required to ensure the legacy of Community Involvement in Chinatown. These new stakeholders could include, but are not limited to:

• Tourism Agencies
• Developers
• Youth
• Real-estate agents
• Broader Edmonton Chinese Community
• Universities
• Financial Institutions
• New Homebuyers

City Roles

The City of Edmonton plays an important role in guiding the Economic Development of Chinatown, acting as a facilitator but also contributing to policy development and the creation of incentives and financing that will encourage future growth in the community. By establishing a strong foundation built on community engagement and consultation, the City has created the framework necessary for proactive community-led economic development to flourish in Chinatown.

Other Levels of Government

The preservation and development of the Cities' cultural industries, tourism, arts, and non-profit voluntary sector remain an important component of both municipal governance as delivered through the Provincial Ministry of Culture and Tourism. Chinatown will require assistance and involvement from this Ministry to advance its cultural and tourism objectives in the future.

Additionally, Chinatown has historically been a center of socio-economic program delivery and provisions. Governmental and Social Agencies including provincial ministries have a vested interest in the economic and social growth of Edmonton's Chinatown Community. The Ministries of Municipal Affairs, Seniors and Housing, and Economic Development and Trade play an important role by directly and indirectly investing in local government initiatives, public safety, affordable housing, economic development efforts, and the health of vulnerable seniors in the Chinatown community. The City and Community can do a great deal when it comes to Chinatown's economic development however there is a need for support from other agencies like the Province and the non-profit voluntary sector.

9.1.1. STRATEGY: LEADERSHIP & GOVERNANCE

Implementation Action: Leadership & Governance

Timing	Responsibility	Recommendation
0-3 months	**Lead:** City **Supporting:** CED Group	**9.1.1.1 Kick-Off Meeting CED Group -** The City to work with community organizations to host a kick-off meeting to discuss the establishment of a Chinatown Economic Development Group
0-6 months	**Lead:** City **Supporting:** CED Group	**9.1.1.2 Roles and Responsibilities -** Confirm all group participation and determine representatives. In order to foster future generations of community leadership youth representatives should be encouraged to be a part of this group. Determine committee priorities using the recommended implementation framework. The CED Group should also identify any other important community issues that could be addressed.
8-24 months	**Lead:** City **Supporting:** CED Group	**9.1.1.3 Resource Implementation Plan -** The City of Edmonton review the funding of an implementation planner to support the Chinatown Economic Development Group

9.1.2. STRATEGY: ECONOMIC DEVELOPMENT

Implementation Action: Boundary/Scale Definition

Timing	Responsibility	Recommendation
0-3 months	**Lead:** City (until Chinatown Economic Development (CED) Group established) **Supporting:** (Lead once established): Chinatown Business Revitalization Zone, Benevolent Society/Cultural Associations, Schools, Community Leagues, Social Agencies, Business Owners, Developers, Realtors, Tourism Edmonton, Edmonton Economic Development Corporation, Edmonton Chinese Young Leaders Council, and Entrepreneurs	**9.1.2.1 Establish and Define Zone -** Define and establish an economic zone boundary to focus renewal efforts for Chinatown.
0-10 years	**Lead:** CED Group, City **Supporting:** Developers, Chinatown Business Revitalization Zone, Cultural Associations	**9.1.2.2 Chinatown North as Area of Focus** - Focus all immediate economic development efforts on Chinatown North
0-10 years	**Lead:** CED Group **Supporting:** Edmonton Chinese Garden Committee, Local hospitality industry tours, Tourism/Travel Lead: CED Group, City companies, City Quarters plan lead	**9.1.2.3 Maintain Chinatown South & Chinese Garden -** The South & Garden will remain and can be commemorated and promoted through tours, public art, and Quarters Plan development. The unique character of these areas should not be diminished by this process and will only benefit by growing.

Implementation Action: Economic Development

Timing	Responsibility	Recommendation
0-6 months	**Lead:** Business Revitalization Zone **Supporting:** CED Group, City, Tourism Edmonton, Business Owners	**9.1.2.4 Chinatown Business Revitalization Zone Strategy Plan -** The Chinatown Business Revitalization Zone prepare a Strategy Plan to address marketing, promotion, business diversification and training, tourism and event planning
1-4 years	**Lead:** City **Supporting:** CED Group	**9.1.2.5 Identify Redevelopment Sites -** Identify potential opportunities for future development within the economic development zone. The City can help identify potential opportunities for under/undeveloped sites. Property details should be compiled such as ownership, market status, zoning, & development challenges.
2-4 years	**Lead:** City **Supporting:** CED Group, Ministry of Solicitor General and Public Security of Alberta (Remand Center), IMPARK, Other Land Owners	**9.1.2.6 Redevelopment Potential Report -** Prepare comprehensive report to identify and assess high priority sites for redevelopment that are currently underutilized or vacant. These could include large surface parking lots, and the vacant Remand Center.
5-10 years	**Lead:** CED Group **Supporting:** City	**9.1.2.7 Economic Development Corporation Study -** Prepare an economic development corporation study for Chinatown & potentially the broader City in efforts to increase redevelopment and increase commercial and residential building in the area

Implementation Action: Increase Residential Population

Timing	Responsibility	Recommendation
3-5 years	**Lead:** City **Supporting:** CED Group	**9.1.2.8 Investment Incentives Report -** Prepare a report on methods and policies to attract and increase redevelopment in Chinatown, such as potential policy interventions like tax abatements and tax incremental financing structures.
0-10 years	**Lead:** City **Supporting:** CED Group	**9.1.2.9 Surrounding Area Considerations -** Comprehensive discussions and awareness of potential development sites surrounding the Economic Zone should be considered. Planning decisions in adjacent areas could impact future development of Chinatown.

9.1.3. STRATEGY: UTILIZE AND ENHANCE PHYSICAL ASSETS

Implementation Action: Access/Connectivity

Timing	Responsibility	Recommendation
0-12 months	**Lead:** City **Supporting:** CED Group	**9.1.3.1 Pedestrian Counts-** Complete a pedestrian/cycling count in high volume traffic areas of Chinatown to assess the need for targeted wayfinding and urban design investment areas
0-12 months	**Lead:** City **Supporting:** CED Group	**9.1.3.2 Identify Key Corridors** - Identify key pedestrian corridors from the Royal Alexandra Hospital to Chinatown with the aim to improve access and wayfinding between the two areas
1-2 years	**Lead:** City **Supporting:** CED Group	**9.1.3.3 Evaluate Transit Service** - Evaluate existing transit service to reinforce Chinatown as a destination
5-10 years	**Lead:** City **Supporting:** CED Group	**9.1.3.4 Future Chinatown LRT** - Evaluate the potential for a future LRT Chinatown/McCauley Station during the redevelopment of the Remand Center

Implementation Action: Placemaking/Identity

Timing	Responsibility	Recommendation
0-6 months	**Lead:** City **Supporting:** CED Group	**9.1.3.5 Chinatown Wayfinding Plan** - Work with cultural institutions, tourism boards, such as the Royal Alberta Museum, Art Gallery of Alberta to promote and identify wayfinding elements that will further establish Chinatown as a destination for tourists
0-12 months	**Lead:** City **Supporting:** CED Group	**9.1.3.6 Gate Maintenance Report** - Prepare a maintenance report for the 107 Street gate and identify annual and longer term maintenance schedules and funding to ensure its upkeep
1-2 years	**Lead:** City **Supporting:** CED Group	**9.1.3.7 Harbin Gate Relocation** - Continue to work with the community to identify a suitable future location of the Harbin Gate, whether it be reconstructed at it's current location,
1-2 years	**Lead:** City **Supporting:** CED Group	**9.1.3.8 97th Street Bridge Options** - The future of the 97th Street bridge will be decided through ongoing discussions with the owner and the community.
2-4 years	**Lead:** City **Supporting:** CED Group	**9.1.3.9 97th Street Bridge Budget Request** - A service package will be prepared to be presented to Council for budget consideration regarding the decision on the 97th Street Bridge.

Heritage/Culture

Timing	Responsibility	Recommendation
0-3 years	**Lead:** CED Group **Supporting:** Chinese Benevolent Association, Chinatown Business Revitalization Zone	**9.1.3.10** Find ways to commemorate and celebrate stories and memories, though film, art projects, pop-up projects in partnership with regular events.
3-4 years	**Lead:** City **Supporting:** CED Group	**9.1.3.11** Conduct a historical building inventory to assess buildings that have cultural significance and contribute to the overall identity of Chinatown. These could include family association buildings, business facades.

9.1.4. STRATEGY: SAFETY & SECURITY

Implementation Action: Safety and Security

Timing	Responsibility	Recommendation
0-12 months	**Lead:** City **Supporting:** CED Group	**9.1.4.1 Inter-agency Meetings -** Continue to build on the efforts of other City partnered initiatives like Homeward Trust and End Poverty Now strategies, to discuss services, partnership and to address issues/conflicts that may arise between businesses, residents, and their cliental
0-12 months	**Lead:** City **Supporting:** CED Group	**9.1.4.2 Immediate Safety Action -** Prepare a list of 'immediate" safety action items to be implemented such as: *a.* Repair of existing lighting and enhance lighting *b.* Increased police presence by foot or bike *c.* Ensure quick maintenance and clean-up of street garbage & parks *d.* Host a meeting with sheltering groups to discuss challenges with exterior building queuing *e.* Hire community ambassadors to help maintain, patrol and provide information to those seeking social services programs & support
2-4 years	**Lead:** City **Supporting:** CED Group	**9.1.4.3 Public Washroom -** Investigate possible locations to install a public washroom in a highly visible area and ensure a regular maintenance schedule is followed
2-4 years	**Lead:** City **Supporting:** CED Group	**9.1.4.4 Agency Spatial Study -** Prepare a report on the impacts of concentrating social agencies and incentives to encourage spatial dispersion
3-5 years	**Lead:** City **Supporting:** CED Group	**9.1.4.5 Community Support Worker's Pilot -** Prepare a feasibility study on piloting a community support workers 'outreach' program

9.1.5. STRATEGY: CREATE A DESTINATION

Implementation Action: Create a Destination

Timing	Responsibility	Recommendation
0-12 months	**Lead:** CED Group **Supporting:** City, Tourism Boards, Chinese Benevolent Association, Cultural Associations, Chinatown Business Revitalization Zone, Merchants	**9.1.5.1 Promotional Materials -** Prepare promotional materials for Chinatown, such as videos, maps, websites, pamphlet and explore all other social medial outlets to promote events and celebrate successes.
6-18 months	**Lead:** CED Group **Supporting:** Chinese Benevolent Association, Chinatown Business Revitalization Zone, Chinese Multi-Cultural Center, Confucius Institute of Edmonton, Edmonton Chinese Garden Committee	**9.1.5.2 Cultural Programming -** Increase regular cultural programming in Chinatown through events, festivals, artist-in-residence programs.
8-48 months	**Lead:** CED Group **Supporting:** Tour/Travel agencies, Hospitality industry, Alberta Hotel and Lodging Association, Travel Alberta	**9.1.5.3 Tourism Packages -** Work with tourism merchants and agencies to prepare specialty tourism packages for visitors
2-10 years	**Lead:** City **Supporting:** Chinese Benevolent Association, Chinatown Business Revitalization Zone, Multi-Cultural Center, Confucius Institute of Edmonton, Garden Committee	**9.1.5.4 Significant Cultural Attraction -** Explore the potential to develop a significant cultural attraction in Chinatown
5-15 Years	**Lead:** City **Supporting:** Chinatown Business Revitalization Zone, Remand Centre, CED Group	**9.1.5.5 Chinatown North LRT Station -** Prepare a feasibility study for the installation of a future North Chinatown LRT Station

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Contact

Courtney Gosselin
Project Director
courtney.gosselin@aecom.com