

WATER FRONT RETAIL REVIEW



Background and Recommendations



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ABOUT THE WATERFRONT BIA

The Waterfront Business Improvement Area's (BIA) mandate is to support the area's economic development. We are committed to supporting the continued growth of the waterfront as a premier destination that is well-connected to the rest of the City of Toronto and is beautiful and prosperous year-round.

As a business community voice looking to unify the waterfront, the purpose of this report and future work recommended is to create a cohesive and desirable retail environment that amplifies the current business community.

The boundaries of the Waterfront BIA, shown below, are from Stadium Road to Cherry Street along the Queens Quay corridor, with the northern boundary of Lake Shore Boulevard and the lake's edge to the south, inclusive of the Toronto Islands as well. We are funded by a special levy on commercial and industrial properties in our area.

For the purposes of this study, the BIA has been split into three different descriptive areas. This is primarily to reflect differences in building typology and demographics of these different areas that have been mapped out in the image below. The Toronto Islands are not included in this report as the nature of these businesses is drastically different, and the Islands are currently undergoing a Master Planning process by the City of Toronto Parks, Forestry and Recreation department.

FOCUS AREAS FOR THIS REVIEW



MAP OF WATERFRONT BIA BOUNDARIES, INCLUDING THE WEST, CENTRAL, AND EAST AREAS AS REFERRED TO IN THE STUDY
BASE MAP FROM GOOGLE, 2023

EXECUTIVE SUMMARY

The purpose of this Waterfront Retail Review is to understand what is and isn't working for public-facing commercial businesses located within the Waterfront BIA area, culminating in a series of recommendations that can be implemented or advocated for by our organization. This report contains an overview of the current planning context and best practices relevant to the area, a built-form review of existing commercial spaces along the waterfront, research summarizing the current retail conditions of the waterfront, and the results of surveys conducted with waterfront business owners, residents, and visitors to the waterfront in Summer 2023.

With most of the eastern waterfront under development, this report and the recommendations suggested here can be used to help inform future development planned for the area and to help future developers and business owners address the issues that are present in the western and central waterfront with the assistance of the Waterfront BIA.

Sample consumer journeys and resident experience sections have been developed to help guide the discussion of what factors need to be considered in the future to ensure that the right retail mix is in place to extend the customer experience on the waterfront for the multiple stakeholder groups that utilize the area.

The report also touches on comparable waterfront districts across North America to illustrate how Toronto's waterfront can be shaped to have a more engaging consumer-facing commercial experience.

The key insight from our study reveals a challenge in aligning the diverse aspirations for Toronto's waterfront, encompassing tourism, office, and residential spheres. This diversity of purpose has led to development decisions that, while well-intentioned, have not fully satisfied the needs of any particular group. Among these decisions, we've observed retail spaces positioned away from main thoroughfares, lobbies in locations better suited for public retail, limited retail engagement places along the water's-edge, retail spaces of sizes that may not be suitable for more diverse business use, uneven and inconsistent distribution of retail areas along Queens Quay, and restrictive signage and façade guidelines that complicate business visibility. Such decisions can impact the long-term vibrancy of the district, potentially affecting its attractiveness to tourists, office workers, and residents who are in search of a dynamic and accessible retail environment but find it hampered by the existing constraints, forcing them to go elsewhere in the city.

For areas of the neighbourhood that are still in the planning, early development or redevelopment stages, it is crucial for the Waterfront BIA to advocate for a re-evaluation of these practices to avoid repeating past oversights. In areas where development is already complete, implementing strategies and forging partnerships such as suggested in our recommendations section may provide significant support to businesses facing these challenges, enhancing the overall appeal and functionality of the waterfront area.

The summary of insights, concerns and recommendations on the next pages is intended to be a quick review of the main points we wish to raise about improved retail development and activation for the waterfront, and where we think we can make a difference with the Waterfront BIA's initiatives and advocacy, always in collaboration with local developments, businesses and multi-governmental stakeholders.

Sincerely,



Oliver Hierlihy
Operations Director
Waterfront BIA



Dorsa Alizadeh-Shabani
Operations Manager
Waterfront BIA

GENERAL PRINCIPLES FOR ADVOCACY RELATED TO PEDESTRIAN-LEVEL RETAIL for new development plans and for on-going redevelopment

A connected waterfront providing a continuous experience

- **Maximize visibility and frequency of retail and public amenity frontages along priority retail corridors to encourage continual exploration and discovery of waterfront opportunities.**
- **Add and enhance wayfinding and signage solutions wherever possible, including for parking access and interior businesses.**
- **Advocate for selective sizing and placement of retail spaces within new developments that considers a balance with current and proposed retail and amenities nearby, focused on a variety of uses for residents, visitors, and office workers.**
- **Support visible connections to retail, specifically those located at the above-ground PATH network. Entranceways to the PATH should be clear from the exterior ground level of buildings.**

The importance of the above are magnified along the high-traffic east-west corridors (Queens Quay, Water's Edge Promenade, Harbour Street) and north-south corridors.

Maximizing vibrancy of activity and showcasing the area's best shared asset - the water

- **Emphasize activity and creative usage of retail space along the water's edge and on the water wherever possible, e.g. waterfront patios, floating patios, water-focused businesses, etc.**
- **Focus on supporting opportunities to create more destination experience spaces that can enhance the area as a multi-element visitor experience, e.g. food halls, breweries, family-friendly activities, etc.**
- **Encourage support for flexible/adaptable commercial space configurations to embrace the seasonal nature of the neighbourhood, e.g. ice cream in the summer, hot chocolate in the winter.**
- **Support the development of spaces that allow the waterfront to house arts, culture, and musical amenities, including as a nightlife destination, e.g. extended hours of operation on special event days, high-quality soundproofing of spaces, etc.**
- **Consider temporary activation of vacant units through early development phases, e.g. artist and exhibition spaces, pop-up retailers, etc.**

Whole Waterfront

Key Insights

- Full 'Waterfront City' experience potential yet to be unlocked - area's destinations and experiences must be better integrated and connected with Port Lands, Toronto Islands, Bentway and 'Under Gardiner Corridor,' Ontario Place and Exhibition Place to ensure that the benefits from co-location of these destinations are realized.

Challenges

- Incomplete neighbourhood build-out and limited wayfinding signage discourages the east-west exploration of the waterfront. Further, inconsistent placement of commercial spaces makes business discovery difficult for newcomers to the area.
- Winter has significantly lower natural visitation, and seasonal use or flexible leases of retail spaces should be encouraged. Efforts should be made to extend shoulder seasons when weather is most agreeable through programming and events.
- Typologies of business spaces and types vary drastically between areas, with a range of target consumer audiences. For example, destination businesses are mostly focused on the central waterfront south of Queens Quay, while businesses that target residents are most concentrated in the far west section of the BIA. This concentration of uses is further exasperated by unit sizes in areas that prohibit diverse uses by being restrictively small or prohibitively large.
- Having most of the commercial spaces located on the north-side of Queens Quay and the multi-modal transit nature of the street, means that pedestrians are discouraged from 'ping-ponging' back and forth easily between the water's edge and the businesses.
- Parking signage is inconsistent and with no coordinated area strategy, leads to a perception of limited parking in the area.

Opportunities

- Market priority zones: The potential for markets and commercial partnerships in parks is growing with the build-out of the neighbourhood, but very difficult to achieve consistently when all new public spaces hope to include them. The WBIA should pick spots it is most likely to support/fund, e.g. Sherbourne Common, HTO Park and then Rees Park once it is open.
- Understand how to take advantage of a network of open spaces and parks in the area and identify what is needed in these spaces (i.e., power, market zones, etc.) for programming, events, and activations to achieve a successful signature waterfront event for shoulder seasons.
- The Martin Goodman Trail is the city's best cycling and pedestrian opportunity near retail, and should be activated in a way that makes the experience less passive and encourages users to 'stop and shop'. There may be opportunities to offer services such as 'bike parking valets' to encourage cyclists to dismount and lock their bikes securely in the area.

Next Steps and Recommendations

- Continue improving north-south connectivity through partnerships such as the City and The Bentway's Under Gardiner Corridor Public Realm Plan.
- Work to improve business wayfinding by implementing signage strategies that make business locations more apparent to visitors.
- Share economic impact data to show visitation and growth of the area to assist in recruiting vibrant retail. Build relationships with retail brokerages.
- Advocate for improved parking opportunities, including parking signage enhancements on public property, bike parking and bus/tour parking zones.

Eastern Waterfront (Yonge Street to Cherry Street)

Key Insights

- 31% vacancy by unit (from 81 units total), primarily units that are newly constructed and have never had a tenant.
- Future potential is significant with higher density, transit connectivity, public realm beautification maximized, and as general awareness of the area increases.

Challenges

- Modest natural pedestrian and user growth. Planned light-rail is not in place. Mix of developed and undeveloped properties and buildings with no public uses are an east-west barrier to use. The Gardiner Expressway creates a north-south barrier, discouraging southbound visitation.
- Limited signage and visibility for ground-level businesses on Queens Quay, and a disconnect with visitors' desire to walk by the water.
- First-mover businesses in area are taking a significant risk betting on near-term completion and occupancy of neighbourhood buildout.

Opportunities

- Prioritize Sherbourne Common as an activation area to support first-mover businesses in the near term, and to enhance long-term general awareness of the area's opportunity to the public.
- Work with Parks, Forestry and Recreation to activate unused retail/café space in Sherbourne Common South.
- Three additional parks planned for Yonge Street Slip, Lower Yonge/Sugar Wharf and Parliament Slip will increase resources and amenities. Advocate to avoid duplicate park amenities or opportunities.
- New Quayside development plans to include significant exciting retail in the area (directly southwest of the Distillery District).
- Redpath Sugar Refinery, a 300m stretch, has limited activation currently, as this is an active manufacturing site. There could be a significant opportunity to highlight and celebrate the site's importance in the food industry, and to expand the museum's presence, or other street front activations.

Next Steps and Recommendations

- Advocate and coordinate with new development retail plans, including Quayside to ensure east-west connectivity and not just north-south. Ensure that storefronts are placed in prominent locations along Queens Quay with articulated façades and patios to maximize high-quality retail opportunities.
- Advocate for the Waterfront East LRT and further PATH connections be completed in the east-end as soon as possible.
- Identify and implement with partners further placemaking interventions (e.g., markets, murals, street furniture, etc.) especially to support interim connectivity.
- Advocate for opportunities for floating patios, and other points of marine use activation and ambition along the East Bayfront promenade.

Central Waterfront (York Street to Yonge Street)

Key Insights

- 8% vacancy by unit.
- 79% of businesses are primarily open for workday population including food courts that are not open on evenings and weekends.
- Streetfront businesses benefit from proximity to the Scotiabank Arena, with little emphasis on the proximity to the water despite being in the waterfront's heavy tourist zone.

Challenges

- Staggered return-to-office since the pandemic, with low attendance on Mondays and Fridays.
- Very few businesses open in locations that service Ferry Terminal visitors. Past re-design of Jack Layton Ferry Terminal has not been funded.

Opportunities

- Properties facing Ferry Terminal may be long-term opportunities to increase retail locations servicing the Terminal (Westin Harbour Castle and Harbour Square apartments). These spaces were originally designed to serve ferry passengers and there is a possibility of converting back to their original use.
- Advocate for large multi-use docks and piers capable of docking Great Lake cruise ships and large vessels that draw visitors.

Next Steps and Recommendations

- Improved signage directing people to explore east-west on Queens Quay (i.e., pilot maps in parks, wayfinding arrows on utility boxes) to encourage visits to more of the growing waterfront than just the heavy tourist areas.
- Work with Parks and Waterfront Toronto to find ways to better activate the 'gateway' entrance area to Jack Layton Ferry Terminal.
- Work with property managers to encourage retail and food courts focused on office traffic to consider staying open for busy summer weekends and major events (e.g. NYE Fireworks).

Western Waterfront (Stadium Road to York Street)

Key Insights

- 7% vacancy by unit.
- Businesses closer to Harbourfront Centre are reliant on their programming and traffic to help bring visitors to the area.
- Businesses further west towards Bathurst are largely targeting the residential population.

Challenges

- Largest concentration of small square footage units, non-chain service, and street-front businesses.
- Highly residential area with limited commercial growth potential for new developments.
- Older arcade façades of buildings have created low visibility and poor signage conditions for existing businesses.
- Business owners express safety concerns due to the shelter and safe injection site at the west-end of the district.

Opportunities

- Maximize potential of planning at Bathurst Quay Malting Silos as a destination and attraction for the area. This includes alignment with Music Garden Park, a high-quality experience with limited activation potential (e.g. small concerts). With limited new development potential in the area, retail opportunities related to 545 Lake Shore and the Billy Bishop Toronto City Airport should be carefully considered to attract and support visitors and customers in this area.
- Rees Park: Currently a parking lot, this site's park plan is being re-designed, providing significant opportunity to improve its integration with the area. This includes alignment with Bentway/Under Gardiner Corridor Plan, commercial retail to its west and/or a park café/restaurant.
- Peter Street Basin Park: Unless a major refurbishment and improved use of the water lot is identified, we recommend filling in the basin to provide improved public space supporting new retail development there.

Next Steps and Recommendations

- Advocate for and educate businesses and property owners, about façade improvement opportunities (e.g., better lighting, signage). Work with the City to explore feasibility of taking on larger scale façade improvement programs through grants that apply to entirety of a building's commercial façade.
- Rees Park: Encourage multi-stakeholder collaborations and commercial partnerships to maximize the opportunity of the re-design. This should be a WBIA focus area for seasonal activation once completed (Commercial retail partnerships, skating rink tie-ins, bike valet service).



SECTION 1

CURRENT CONTEXT



1.1 PLANNING DOCUMENTS AND CURRENT STANDARDS

This section is a summary of planning documents and reports that have been published relevant to the waterfront and commercial space or retail within the city. It is meant to highlight the goals and the primary examples for retail spaces and typology, and architectural elements that need to be present along retail strips to help set them up for success. It also includes improvements to the public realm that will help highlight the retail opportunities in the area.

City of Toronto Retail Design and Development Best Practices Manual 2019

The City of Toronto's Retail Design Manual is a collection of best practices that are intended to provide guidance on developing successful ground floor retail spaces through the city by providing aspirational retail design best practices to inform, guide, inspire and educate those involved in the design and development of retail uses. It was adopted by City Council on October 27, 2020.

Some of the key guidelines mentioned in this manual that must be applied to the waterfront are listed below. The Waterfront BIA should encourage all new developments within its boundaries to reference these key principles, as well as others found within the manual to ensure best practices are followed.

Linear Retail Main Streets: Expanding, where possible, the public realm to provide additional pedestrian amenities such as wider clearways, patios, and retail spill-out areas. Maintaining a fine grain of entrances and clear glazing along the street edge that reflects the character of the street, utilizing a combination of storefront materials, lighting, hardware and signage to establish the businesses' brands. Limiting the size of office and residential lobbies on retail street frontages and providing pick-up/drop-off areas on side streets.

Retail Street Corners: Toronto is primarily a grid city, and corner sites are most visible. They are where the highest volume of pedestrian traffic exists, where transit stops are located, and, therefore, have the most potential for social interactions. Retail at corner sites should reinforce the identity and amenity of these sites. This can be done by 1) considering building setbacks to create more open spaces and incorporating pedestrian amenities such as patios, transit stops, landscaped areas and street furniture, and 2) locating retail uses with dynamic interiors and active outdoor uses to promote vibrant and memorable corners.

New Retail Streets: Many streets in the city are going through changes and growth as part of the redevelopment of larger sites. Often, these sites are part of planning frameworks that include new higher-order transit, subways, LRT lines, etc. The location, design, and phasing of retail on these large sites are integral to creating complete communities. A recommended practice mentioned in the manual is to design the ground floor with alternative uses that can be easily converted into retail when the time is reached that the population will support additional retail uses.

Central Waterfront Secondary Plan

The Central Waterfront Secondary Plan includes four core principles that the Waterfront BIA supports as crucial for retail success:

- A. Removing Barriers/Making Connections
- B. Building a Network of Spectacular Waterfront Parks and Public Spaces
- C. Promoting a Clean and Green Environment
- D. Creating Dynamic and Diverse Communities

The Central Waterfront Secondary plan breaks the waterfront into distinct districts with specific plans for each area. However, the general principles that pertain to retail and public space activation and design are summarized in the following page.

1.1

Ground-floor design and public realm enhancement: Developments on Queens Quay, Yonge St., Lower Sherbourne Street, Harbour St. (Downes) and Lower Jarvis will enhance the adjacent public spaces with a curated mix of interactive ground-floor facilities like shops and restaurants, as well as commercial uses that service residents, workers, institutions and arts facilities. The streetscape will feature active frontages with high window transparency and consistent entrance rhythms to maximize pedestrian activity and universal accessibility. Ground floor uses should enhance the safety and liveliness of adjacent streets and open spaces.

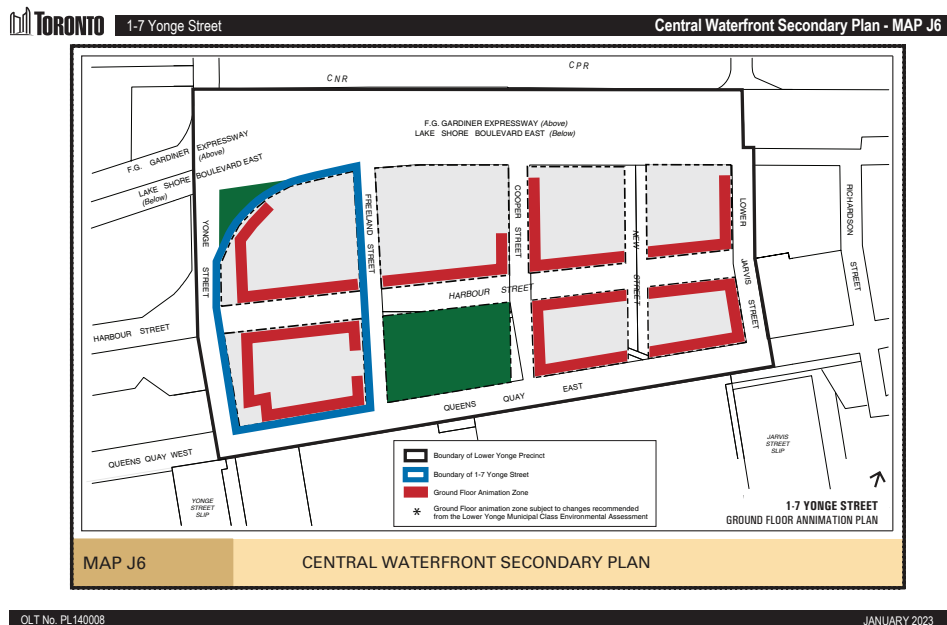
Focus on Queens Quay: Positioned as the primary street of the waterfront area, buildings fronting Queens Quay will have a consistent street wall of mid-rise buildings and active ground-floor uses to reinforce the street's importance.

Streetscape and pedestrian prioritization: Plans for the streetscape include pedestrian-friendly features, buffers between sidewalks and roads, high-visibility pedestrian crossings, mid-block connections, pedestrian promenades, and wide sidewalks with space for street trees.

Cycling infrastructure and vehicular lane reduction: Streets will be redesigned to include cycling infrastructure that connects to the city's more extensive cycling network. The width of vehicle lanes will be minimized to create safer and more spacious conditions for pedestrians and cyclists alike.

Loading and parking strategies: Using below-grade loading facilities is encouraged to avoid disrupting ground-floor animation zones. Buildings on the same block are encouraged to share consolidated access for parking and loading, with design integration into the building façade.

PATH connectivity: Opportunities to extend the PATH network will be pursued. The Waterfront BIA has agreed to support the continuation of above-ground or second-floor PATH connections as that is an established and popular standard for the indoor pedestrian network south of Union Station.



This consolidated version of the Central Waterfront Secondary Plan is unofficial and for reference only. For the official version of the Central Waterfront Secondary Plan policies and maps, please refer to the applicable Ontario Land Tribunal Decisions.

This map of the Lower Yonge Precinct Ground Floor Animation Zone from the Central Waterfront Secondary Plan illustrates how retail and other ground floor animation space will be focused primarily on arterial streets; Queens Quay, the new expanded Harbour Street (Downes), and Yonge Street, as well as adjacent to public spaces such as the forthcoming park at Sugar Wharf.

1.2 BARRIERS AND CHALLENGES

WESTERN AND CENTRAL WATERFRONT

Many of the primary barriers and challenges faced by the western and central waterfront were outlined in the WBIA's Strategic Framework and Tactical Plan written by Live Work Learn Play (LWLP) in 2017. The document was written before the expansion of the Waterfront BIA to include the eastern area, and their analysis is most relevant for the previous boundaries of the BIA (Stadium Road to Yonge Street).

The specific barriers that impact the consumer-facing commercial space in the area are:

1. Most of the retail in the western and central waterfront is located on the north side of Queens Quay, and having pedestrians more easily navigate between the two sides of the road will enhance the retail experience. Especially with multiple crossing barriers, bike lanes, LRT lanes and car lanes, it may discourage pedestrians from 'ping-ponging' freely between both sides of the street. There is a lack of sufficient pedestrian crosswalks and lights that also contribute to the issue.



MAP OF CENTRAL/WESTERN WATERFRONT - MAJORITY OF BUSINESSES ARE LOCATED ON THE NORTH SIDE WITH TRANSIT STATIONS ON THE SOUTH SIDE - BASE MAP FROM GOOGLE, 2023

2. Another area for improvement is the low overhangs and the old arcade-style entrances of the businesses along Queens Quay West, which hide the storefronts of the retail spaces, rendering them less visible to pedestrians. This will be discussed in further detail, in *Section 1.3 Built Form Review*.
3. The streetcar also lets passengers out on the south side of the street, which, combined with the street-crossing barriers, discourages pedestrians from exploring the north side of Queens Quay.
4. Most of the retail mix is designed for the workday population and the local residents, and while the target audience frequents the stores 5-7 times per week, this cannot be the only draw and source of revenue for the retail in the area.
5. The physical/psychological barrier created by the poorly maintained underpasses deters from the experience of visiting the waterfront.
6. There are only a few destinations along the waterfront that encourage visitors to linger and spend more time within the area. This is partly due to the need for more unique or destination commercial uses in the area.

1.2

EASTERN WATERFRONT

The eastern waterfront is mostly under development, and Queens Quay East still needs to be fully activated, but the Waterfront East LRT is still not funded with a construction timeline. The goal of the revitalization is to have the same general public realm design as the western and central waterfront. While the redevelopment is underway, the community expects construction and disruptions in the area before the streetscape is transformed into the ideal space for pedestrian activity. As mentioned in the *Toronto Retail Design Manual*, in this scenario, the best practice is to design the ground floor for alternative uses that can (afterwards) be converted into retail once the density and population are present in the area to support the commercial use. Section 4 *Recommendations*, has significant commentary and ideation about how to approach eastern waterfront retail vibrancy as the area is built-out.

1.3 BUILT FORM REVIEW

The built form of commercial spaces plays an important role in the economic success of any business that decides to move there. The exterior of any consumer-facing commercial unit is the first impression that the public receives and is a determinant of whether or not a person will enter the establishment. It also determines the overall pedestrian experience; therefore, a more inviting and visible store frontage will create a more positive atmosphere for visitors.

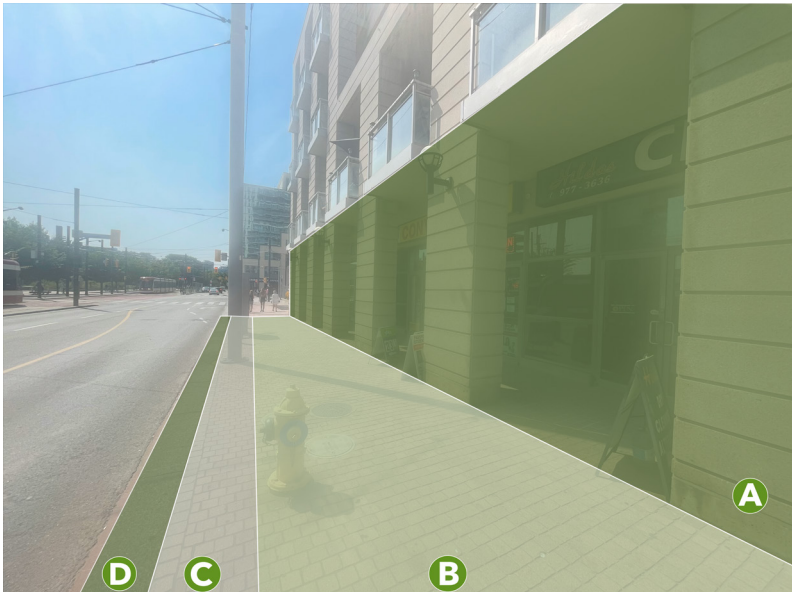
Toronto's Vibrant Street Guidelines identify four zones between the building façade and the roadway (Toronto Retail Design Manual, 2017):

- A.** The Frontage and Marketing Zone, which is next to the building and may consist of any privately-owned building setback plus the public right-of-way.
- B.** Pedestrian Clearway, which is the prime route for people moving along the sidewalk.
- C.** Furnishing and Planting Zone, which provides space for landscaping, benches, traffic lights and signage, etc.
- D.** Edge Zone, which buffers the sidewalk from parked cars and moving bicycles and vehicles.

THE DIFFERENT ZONES AS IDENTIFIED BY TORONTO'S VIBRANT STREET GUIDELINES



EXAMPLE OF DIFFERENT ZONES WITHIN THE WESTERN WATERFRONT



1.3

The second image (previous page) is an example of the commercial space street frontage that is seen on the western waterfront. Zone A is designated as the Marketing Zone, and as outlined in the images above, most of the zone is covered by the shadow created from the overhangs, which takes away from the “Marketing Zone” of each business. The Toronto Retail Design Manual also indicates the importance of appropriate overhang design, that is proportionate to the context of the street and building design, so it does not create shadows. The wide and closely spaced columns also take away from the public realm space that should be available to the commercial unit, which creates a less active and less lively pedestrian experience.

EASTERN WATERFRONT

The challenges concerning consumer-facing commercial space are similar to those of the west side. According to the research conducted by the Waterfront BIA, the challenges that business owners face are primarily with regards to signage and visibility as well, but in a different aspect than in the western area. The design of buildings on the eastern waterfront is more modern and large-scale than that in the west, including large office buildings. This includes lobbies with limited retail activity at ground-level but with retail on above ground levels overall. This can be confusing to navigate and emphasizes the need for signage and wayfinding enhancements within the buildings themselves as well as at the street-facing entrances to advertise the activities more hidden inside the buildings.

As mentioned previously, 79% of businesses are located on the north side of Queens Quay throughout the entirety of the newly expanded BIA boundaries. In addition, many businesses on the eastern waterfront do not have Queens Quay frontages, making it far more difficult for pedestrians to drop in as they are located in plazas or north-south streets. The most pressing issue that eastern waterfront businesses are facing is the need for more awareness and adequate signage. With the water being a primary draw for visitors, visitors typically walk on the south side of Queens Quay or the Water’s Edge Promenade, making it difficult for business owners to attract walk-ins.



IMAGE OF EASTERN WATERFRONT FACING EAST AT BAY STREET

CENTRAL WATERFRONT

The main issue the central waterfront currently needs help with is the slow return to work that has been ongoing since the pandemic. Most businesses in the central portion of the BIA focus on the workday customer base located in the office towers, with the majority of businesses in this area located within the indoor pedestrian PATH system. This, in addition to limited signage and wayfinding tools at the pedestrian level on Queens Quay has caused businesses to focus solely on internal building foot-traffic. The interior food courts would need external building signage and advertisement to attract customers outside the office buildings and beyond the workday hours.

WESTERN WATERFRONT

As mentioned earlier in this report, the arcade-style exterior of most of the commercial spaces on the western waterfront create a significant shadow. It prevents pedestrians on the south side of Queens Quay from being able to see what shops are located on the north side of the street. Although the overhangs provide adequate shelter from extreme weather events, their low height is a barrier to organically attracting passersby.

There are other issues with the design of the exterior of ground-floor commercial spaces on the western waterfront, which are outlined and explained in the image below.



EXAMPLE OF COMMERCIAL SPACE STREET FRONTAGE ON THE WESTERN WATERFRONT

1.4 CONSUMER JOURNEYS

The waterfront is a destination for many visitors, especially during the Spring and the Summer, and it is to the benefit of the local economy and the area businesses to extend these consumer journeys and stay as long as possible. This means that based on the demographics that are attracted to specific destinations within the BIA, there needs to be other businesses in the vicinity that attract the same type of demography and fulfill their needs while they are at the waterfront. A few successful examples are listed below, along with a few destinations along the waterfront that don't have complementary businesses to support their complete consumer journeys.

Examples of complete consumer journeys:

Urban Beaches (HTO Park or Sugar Beach) - A group of young adults decide to spend a hot summer day relaxing by the waterfront. They set their destination as one of the urban beaches along the waterfront; they decide to grab a snack from one of the convenience/grocery stores in the area or one of the fast-food restaurants. After a long day of tanning and snacking on the beach, they might want to settle down at a full-service restaurant to grab drinks and dinner before returning home.

Offices - The average office worker gets to the office around 9am and grabs a coffee and breakfast from a choice of coffee shops near most office buildings on the waterfront. Around noon, they head downstairs to find something to eat for lunch. There are more options within the central waterfront area than the eastern, with office buildings in the central area also being connected to the PATH system, resulting in a more complete customer journey in the central waterfront. After a long day of work, they may pick something up from the area grocery stores or dollar stores on their way back home.

Sports stadiums - Two major sports stadiums (Rogers Centre and Scotiabank Arena) are located adjacent to the waterfront and attract many sports enthusiasts. To service them and their needs, there are quite a few sports bars in the area for the attendees to enjoy drinks and food at before or after the game with other fellow fans and friends, extending these sports fans' journeys while they are in the area.

Examples of incomplete consumer journeys:

The Toronto Islands - Many visitors, primarily families with young children, come to the waterfront to spend a nice day and have a picnic/beach day at the islands. They may stop by area grocery stores to pick up supplies or food items missing from their picnic baskets before they board the ferry or the water taxis. After a long and eventful day at the Toronto Islands, they may be looking to sit at a family-friendly diner or restaurant to grab dinner or some snacks before they start their relatively long commute back home. Unfortunately, there are few options for family-friendly restaurants around the Ferry Terminal area, where most visitors would end their journey.

Family friendly attractions - This includes businesses such as *Lighthouse Immersive*, currently at One Yonge. Much like the Toronto Islands, these destinations also attract families. Unlike the Islands, these could be year-round destinations and the visitation isn't limited to the warm months, which is a rarity at the waterfront. On the other hand, these attractions lack the same supporting businesses as the Islands to extend the visitor experience. With no options for family-friendly dining, they resort to venturing outside the waterfront area or going back home to eat.

High-end clothing boutiques - These types of businesses are considered destination businesses, mainly because customers plan their trips to visit there. The result from these planned trips is that it should generate net new foot traffic to the area more than it benefits from passive passersby. As an example, a bridal party or a group of friends show up to the store to find the perfect dress for the wedding or an event they have coming up. After a couple of hours of perusing the store's inventory, they are ready to continue the celebration by going to a high-end bar or restaurant with an intriguing atmosphere to have drinks and maybe dinner. The eastern waterfront has limited options visible from the intersection of the bridal store or within walking distance, and therefore, they have to resort to options outside of the waterfront, or they cut their trip short and head home in separate directions.

1.4

Area colleges - There are a number of colleges located in the waterfront area (George Brown, Université de l'Ontario français, etc.), attracting many students to the waterfront. While they are in the area, mainly the eastern waterfront, they have a few fast-food restaurant options for a grab-and-go lunch at a low cost, in addition to the food options at the institutions' cafeterias. However, there are few student-oriented joints where they can hang out with their friends and classmates after a long stressful day in classes or to celebrate the end of a semester. Therefore, they either head home or to a more suitable bar or restaurant with a student-oriented vibe.

Area hotels - Many tourists visiting Toronto stay at one of the two hotels along the waterfront (Westin Harbour Castle or Radisson Blu). They choose these hotels because they are close to some of the city's attractions (the CN Tower, Ripley's Aquarium, etc.) and the downtown core. They can also enjoy a beautiful view and expect to take advantage of waterfront's activities and attractions. When they arrive, they might feel underwhelmed by the lack of things to do at the waterfront, considering that most waterfront cities worldwide are significant tourist attractions with various activities for visitors and are filled with waterfront-facing restaurants with patios facing the beautiful view.

Resident Experience

Due to the large boundaries of the WBIA the resident experience is expected to be different based on which area of the BIA they reside in, especially because of the developing nature of the eastern waterfront.

Eastern waterfront - These residents are likely new to the neighbourhood as the area quickly fills with new residential buildings. They are looking for a way to integrate into the community and establish the neighbourhood. These residents might include young adults who have moved out and want to find new friends and neighbours in the area. They are looking for local cafés and bars to do so but don't find themselves with many options and might resort to going north of the Gardiner Expressway. The residents also include empty nesters who have downsized from their bigger homes in the suburbs and have chosen the waterfront as a tranquil neighbourhood close to the downtown core. Both groups might feel disconnected from the rest of the city as there is no LRT line like there is on the Central and Western Waterfront.

Central and western waterfront - The residents in these parts of the neighbourhood are much more established as this area has gone through the Queens Quay Streetscape Revitalization and has a functioning LRT line. They have lived in the area for a very long time and enjoy the fact that they can enjoy the calm and quiet of the waterfront while living in the downtown core.





SECTION 2

RESEARCH AND FINDINGS



2.1 METHODOLOGY

This section includes an inventory of all the consumer-facing commercial space that is now available within the Waterfront BIA and a summary of the survey results conducted with area businesses.

The data on existing street-front businesses was collected through field surveys and supplemented with CoStar data. This section is meant to provide context to the current business typology that is mainly defined in East, Central, and West.

For the purposes of the study, “vacancy” is defined from the standpoint of consumer-facing vacancy and not from a real-estate perspective. If the property appears vacant and cannot be accessed by the public, the business is listed as vacant. Consumer-facing commercial space vacancy rates will typically be higher than real-estate leasing vacancy rates, e.g., a property could appear vacant, yet the lease is still being paid.

The business survey data was collected through business drop-ins and one-on-one interviews with business representatives. The discussions included a set of questions to guide the conversation, but other discussion topics regarding business conditions were also encouraged. The Waterfront BIA conducted the business drop-in surveys with 65 businesses throughout the waterfront, primarily restaurants, but inclusive of other notable categories as well.

In addition, the Waterfront BIA conducted neighbourhood walks and analyses with retail consultants and their insights, and recommendations were taken into account for the final recommendations that are listed in this report.



WBIA TEAM CONDUCTING PUBLIC INTERCEPTS



ONE-ON-ONE INTERVIEWS WITH BUSINESSES

Please note: vacancy and business category data is accurate as of Fall 2023, and will be updated on an annual basis going forward.

2.2 WATERFRONT BIA WHOLE AREA DATA



MAP OF WATERFRONT BIA AND ITS 800M TRADE AREA - BASE MAP FROM GOOGLE, 2023

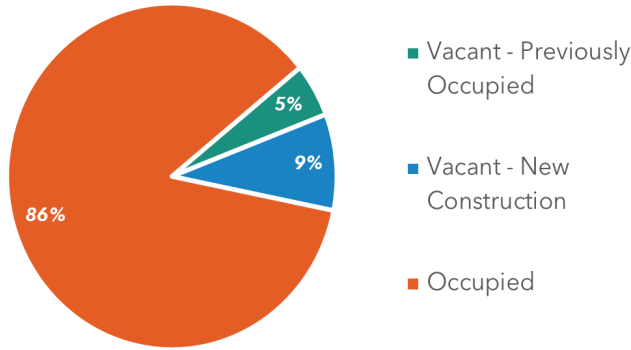
Vacancy, Inventory, and Rent

	Inventory (Sq. ft.)	Vacancy	Market Rental Rate	Market Sales Price
Waterfront BIA	911,600	14%* (9% new construction)	\$51.94**	\$848**
800m Trade Area	1,400,000	4.2%**	\$49.06**	\$648**

* Source: Waterfront BIA Inventory

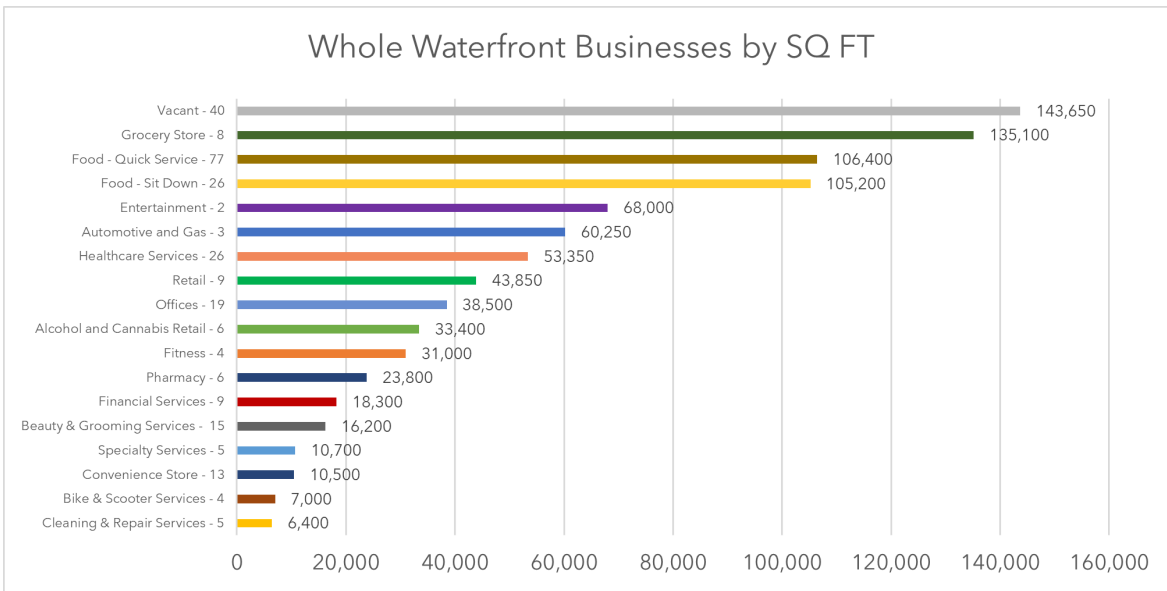
** Source: CoStar, June 2023. Note: CoStar Vacancy expected to be significantly lower than field research due to methodology

Whole Waterfront Vacancy - Unit Count



The waterfront has a notably high vacancy rate compared to the 400m and 800m Trade Areas that primarily stretch across the city's downtown core. While these two vacancy rates are not directly comparable due to their separate data sources, the higher rate on the waterfront can be reasonably attributed to 9% of the newly constructed retail inventory along the waterfront that is primarily in the eastern section of the waterfront. These units have not yet been leased out for a variety of primarily construction-related reasons. The total vacancy within the BIA is made up of a total of 40 units or 143,650 sq. ft. of commercial space.

Whole Waterfront Businesses by SQ FT

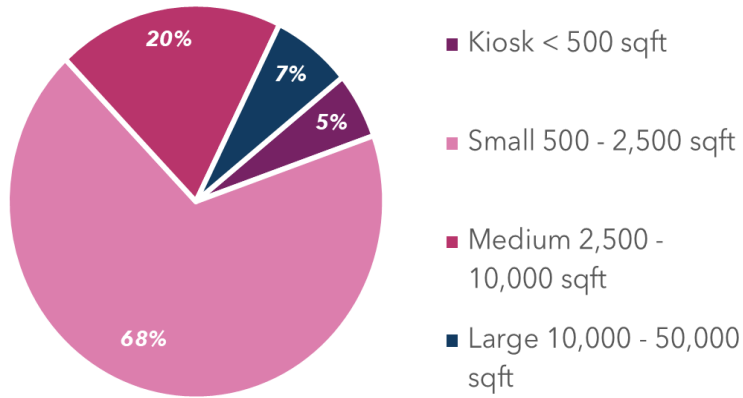


The vacancy rate, when viewed as a category of business, is the waterfronts largest category by square footage. Given that it will all be leased out such as the rest of the waterfront has, it is an optimistic growth area for the district. Other major categories for the BIA as a whole, by square footage, are Grocery Stores (8) and Entertainment venues (2), and by unit count, Food - Quick Service (77) and Food - Sit Down (26) and Healthcare Services (26).

Quick numbers for whole waterfront area:

- Chain Businesses: 42% (188/277)
- Businesses South of Queens Quay: 29% (79/277)
- Businesses Adjacent to the Water: 9% (24/277)
- Businesses Located Adjacent to a Park or Plaza: 10% (29/277)
- Interior Businesses: 25% (70/277)
- PATH connected businesses: 16% (44/277)
- Businesses with entryway not on ground level: 13% (38/277)
- Outdoor Patios: 52% of street-facing food services businesses (36/69)

Business Count by Unit Size -Whole Waterfront



Consumer Facing Commercial Units’ Size Distribution:

The waterfront has developed from west to east, with a significant variety of unit typologies and sizes constructed as the needs for the waterfront have shifted. For the purposes of analysis, we have categorized units along the waterfront as follows:

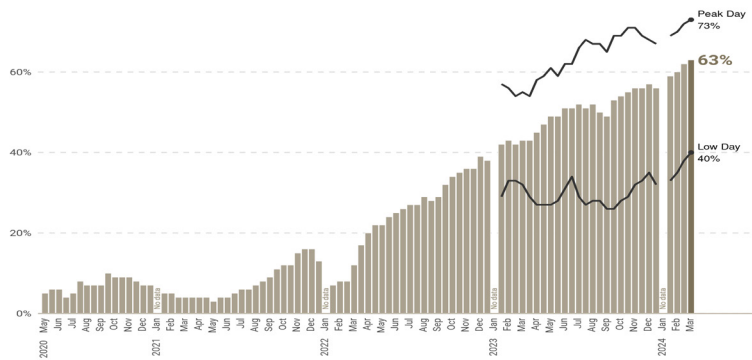
Kiosk < 500 square feet: This type of space is often found in mall-type environments and high foot traffic areas. They serve as temporary or small-scale retail points, usually lacking any significant preparation area or storage space.

This includes seasonal vendors, such as those at Harbourfront Centre or little cafes in the lobbies of office towers.

Small 500 - 2,500 square feet: This range includes the majority of waterfront retail space, as is to be expected, and is made up of business categories such as quick-service restaurants, small cafes, boutique shops, healthcare and beauty services, pharmacies, and storefront office spaces.

Medium 2,500 - 10,000 square feet: For the waterfront, this range primarily includes business categories such as sit-down restaurants, mid-sized grocery stores, and larger pharmacies.

Large 10,000+ square feet: The largest commercial spaces on the waterfront are made up of department and grocery stores, entertainment venues, large high-end restaurant spaces, as well as interim-use automotive retail space in the east end.



Index calculated as a percentage of pre-COVID occupancy.
 The Index is supported by the City of Toronto, Downtown Yonge and Downtown West BIA. It is a measure of the percentage of office employees returning to the office compared to the number of employees who would normally have come to their offices pre-COVID. For a detailed description of the calculation please contact Iain Dobson at idobson@ssraresearch.org

Office Vacancy:

For both the Waterfront BIA Boundaries and its trade area, the office occupancy rate is significant to many businesses whose primary customer base is office workers. This trend has significantly shifted following the COVID-19 pandemic. The SSRA Office Occupancy Index (at left) for all of downtown illustrates that just over 60% of the workday population has returned to the office, with the average workday occupancy of 63%, with a peak of 73% on Wednesdays and a low of 40% on Mondays.

With the shift away from office, it is anticipated that the development pipeline in Downtown Toronto will shift towards residential, which could have a resulting impact on the business mix throughout the waterfront over time.

Business Survey Results:

Reasons for Choice in Location: Looking at the waterfront, businesses primarily cited the below reasons for opening in the district. While these answers differed significantly by area of the neighbourhood, the themes remain the same for the value to a business locating itself in this part of the city: an increased density of customers attracted to the area’s attributes of attractions, waterfront recreation, and a significant office density.

2.2

- High Visitation (15)
- Beautiful Location (13)
- Office Workers (11)

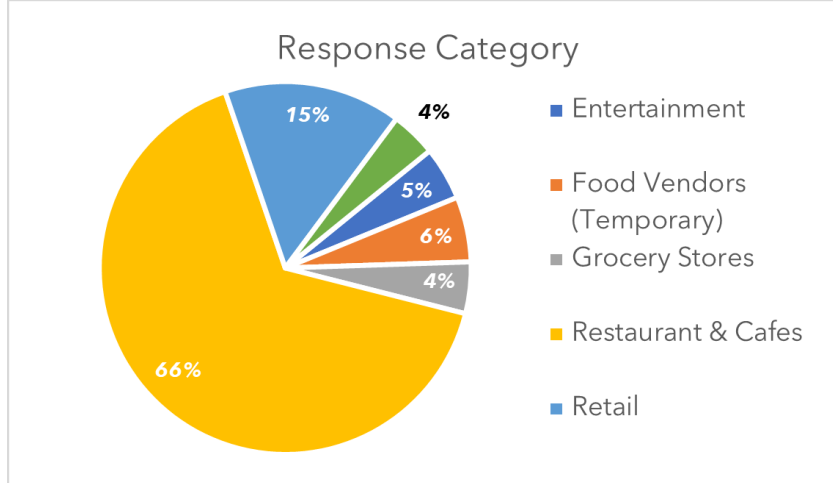
Seasonality of the Waterfront: When asked what they thought would prevent other businesses from opening on the waterfront, businesses, regardless of district, indicated that higher rents (32) and harsher winters (27) impacted conditions. Additionally, businesses overwhelmingly indicated that seasonal impacts were more significant on the waterfront than in other parts of the city (52), both in terms of substantial volumes of visitors in the Summer and a lack of visitors in the Winter.

Intriguingly, internal businesses in the central area food courts noted that winter was busier for them because people do not leave the office buildings to get lunch and aren't taking vacations as they do in the summer. This highlights how vital the PATH connection is to waterfront businesses, providing year-round shelter for businesses' customers.

Customer Survey Results:

A simple survey was conducted of people visiting the waterfront during the Summer of 2023, and they were asked the open-ended question, "What businesses are missing at the Waterfront?"

There were a total of 582 responses to the survey, 72% of which were commentary on food sold in the area. Of those responses, 27% identified specific types of food, while the remaining 33% identified qualities surrounding the places they wanted to see.



Top Survey Answer Categories

Food Types	Food Qualities	Retail Types	Entertainment
Coffee shop/Bakery (76)	More/Better (65)	Clothing/Shoe Stores (25)	Water Recreation (14)
Specific Ethnic Food (67)	Patios (22)	Local/Boutique (17)	Night Life (9)
Sweet Treats (55)	Quick Service (12)	Alcohol/Cannabis (7)	Theatre (4)

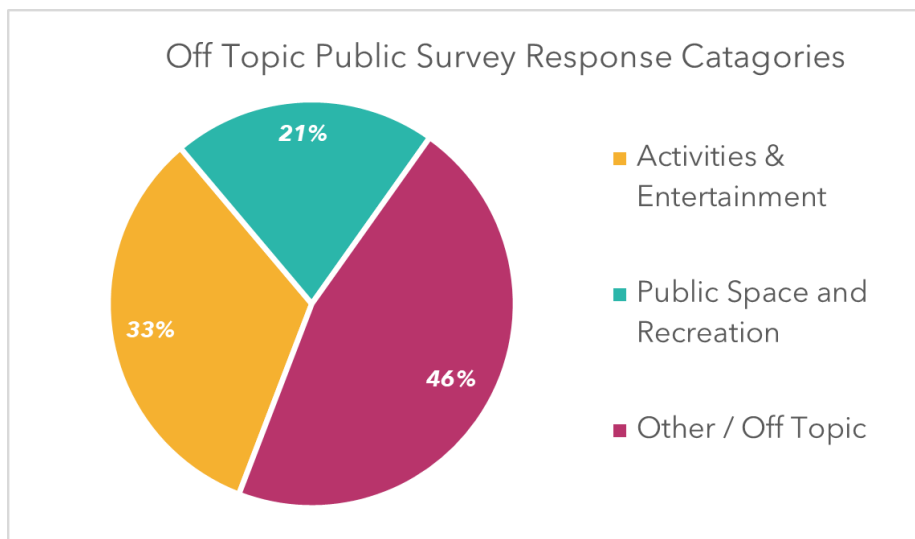
While these responses are interesting on their own, we do not expect these results to serve as a guide for what businesses should open on the waterfront but more as an indication of the type of experience people are broadly looking for when they come to the area. These categories show a strong desire for an increased visitor experience fueled by business to enhance the waterfront experience.

2.2

Interestingly, in addition to the 582 responses about businesses that should be on the waterfront, there were 242 intercept responses that needed to be filtered out of the initial dataset due to being off-topic based on the question "What Businesses are missing at the waterfront?". These comments were primarily about non-business activities, such as entertainment or public space and recreation.

While these answers were not directly related to the question, they are strong indicators of why people come to the waterfront: for something to do. Common activities cited were dog parks, ice rinks, live music, markets and events, splash pads and playgrounds, movie nights, beer festivals, and activities for kids.

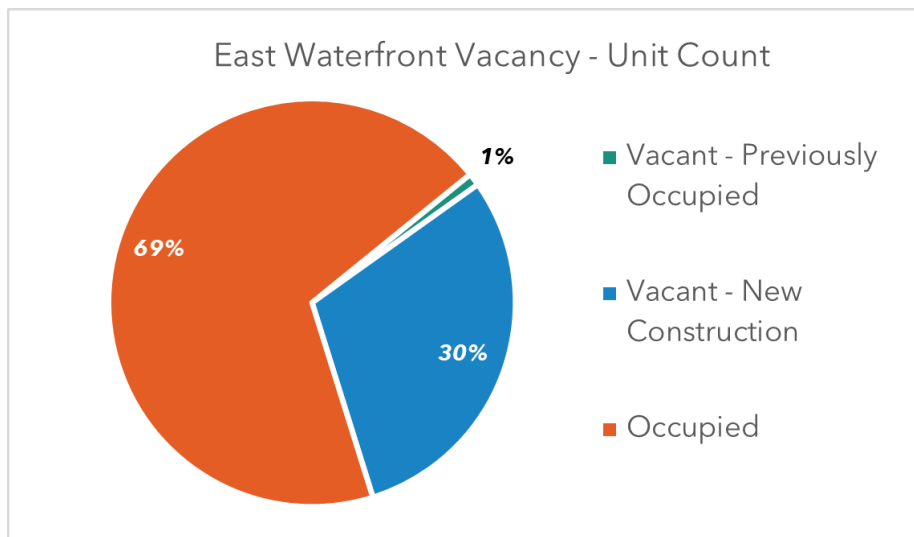
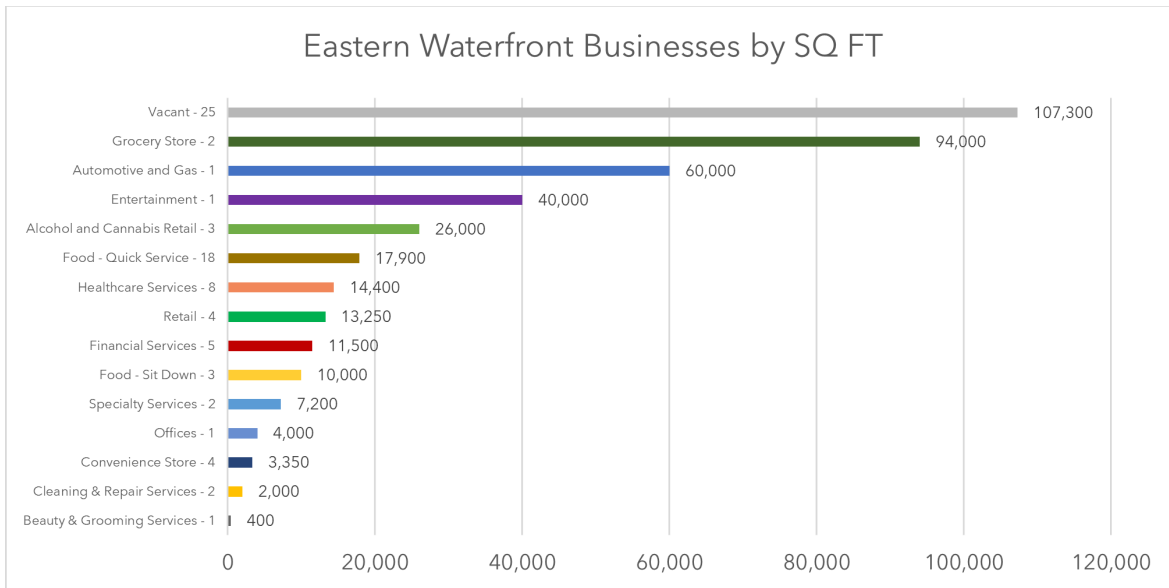
These types of waterfront adjacent recreation activities that give people "something to do" are crucial to differentiating the waterfront from the rest of downtown and co-adjacency opportunities to businesses that are otherwise just located at the city's edge.



2.3 EASTERN WATERFRONT YONGE ST. TO CHERRY ST.

Inventory of Businesses and Analyses:

Vacancy: Currently, there is an extremely high vacancy rate in the east end of 31% by units or 26% by square footage. This is predominantly due to many newly constructed units through the east end and delays driven by the COVID-19 pandemic to retail occupancy and new construction for the area.



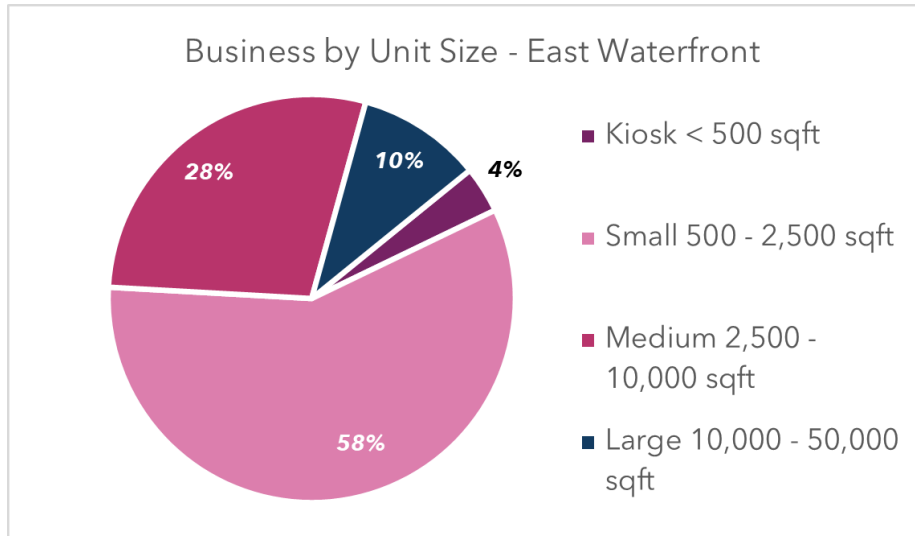
Pre-development Interim Use: There is a notable difference in the usage of space in the east end as compared to the rest of the neighbourhood, with legacy industrial spaces being used on an interim basis, waiting for developments like Quayside to begin, which are unusual business categories for the district and occupying significantly larger units as compared to businesses located in new-construction. These five interim-use businesses account for 26% of this district's total square footage of occupied commercial space at an estimated 107,200 - 411,300 sq. ft.

Chain Businesses: East end has significantly more chain businesses than other areas of the BIA, with 66% of units currently occupied by chains. This is likely due to chains being able/willing to take on the risk and build-out costs to occupy these newly constructed units.

2.3

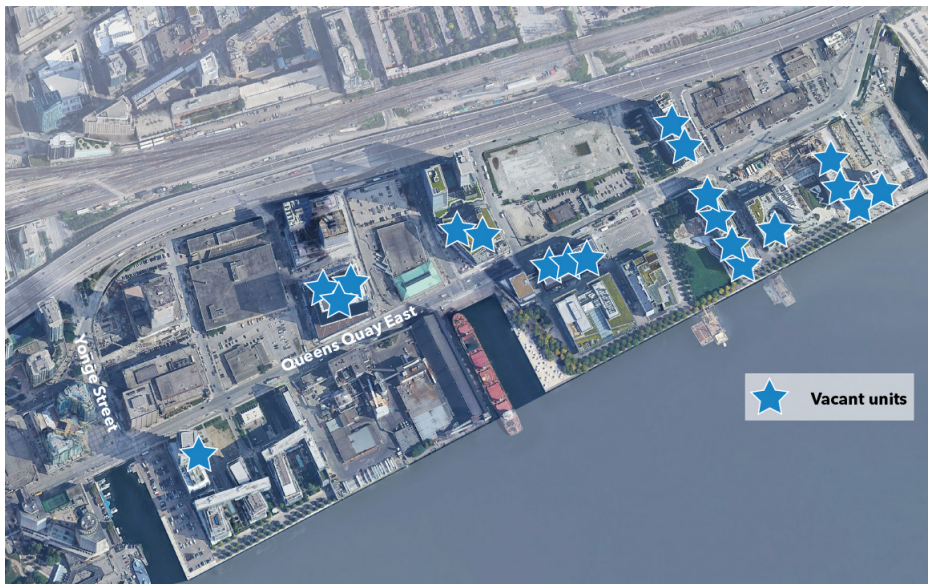
Primary Business Categories:

- Two grocery stores make up the largest capacity of square footage in the district at an estimated 94,000 square feet.
- Quick-service food makes up the highest number of units, with 18 total businesses, two of which are independent (non-chain).



Business Locations:

- 31% of commercial units are located south of Queens Quay East. However, only 10 of 26 units are currently occupied, as much of this space is located within the Bayside Developments, which is nearing completion. Only one of those occupied units is located adjacent to the water.
- Six businesses are located directly on the borders of parks (Sherbourne Common North and South), while 12 businesses are located within a plaza space separated from Queens Quay East (The Yard).

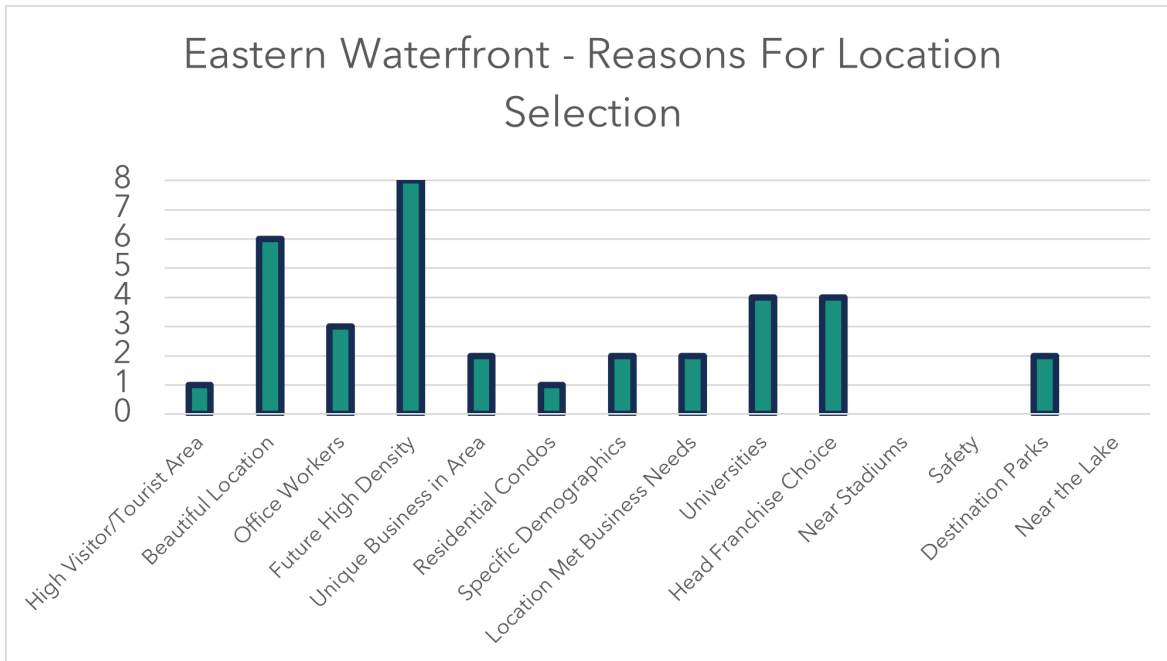


MAP SHOWING EASTERN WATERFRONT VACANCIES - BASE MAP FROM GOOGLE, 2023

Business Survey Results:

Reasons for Choice in Location: Eastern businesses are best categorized as trailblazers, as they frequently cited that they chose their location for the “future to-be-constructed” high-density buildings for the area. Interestingly, many businesses indicated that the corporate head office or franchisor chose their locations as part of a multi-year plan to develop a foothold in the area. The developing beauty of the area, frequently with references to the area’s destination parks such as Sherborne Common and Sugar Beach, was also highlighted as helping to attract customers. However, compared to the central and west BIA districts, it is notable that high visitation was not cited, possibly citing the slow development of the area.

- Future High-Density area (8)
- Beautiful Location (6)
- Universities (4)
- Head Office / Franchisor choice (4)



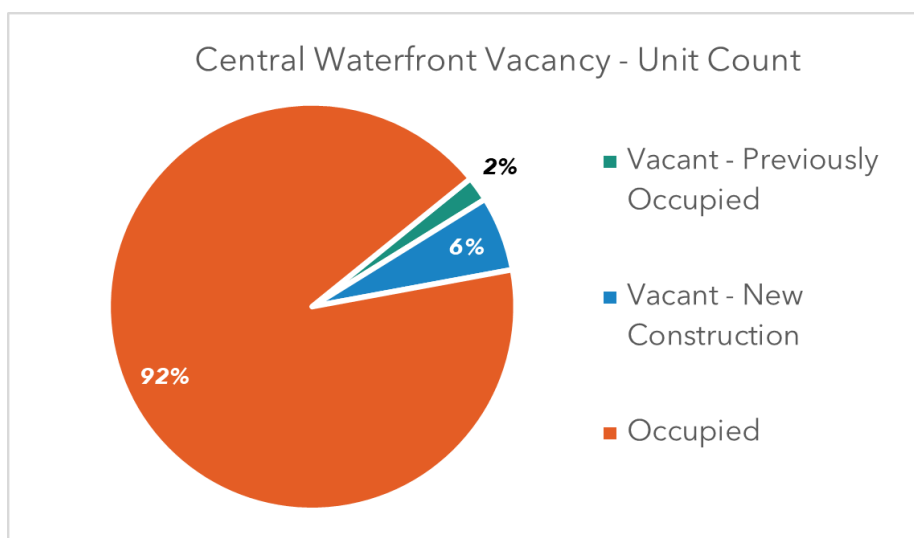
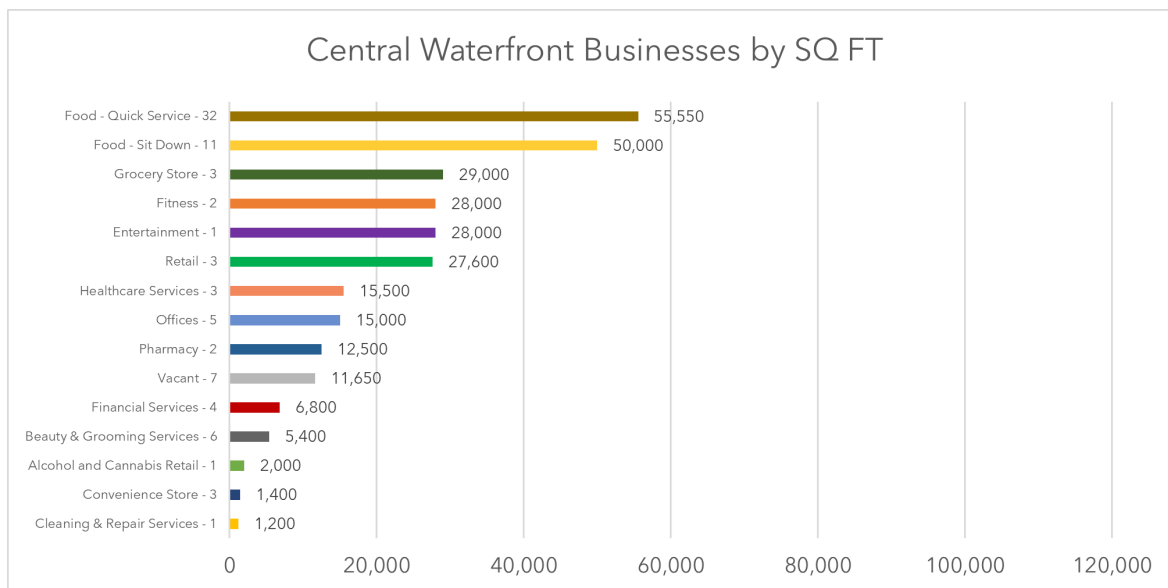
Issues Preventing Businesses from Locating in The Area: For the east-end, businesses highlighted that the district was challenging to get to, and the incomplete neighbourhood build-out were reasons other businesses might not open here, both of which are deeply connected to the ongoing development of the area and the need for the Waterfront East LRT.

- Difficult to get to because of underpasses, lack of transit, traffic, and parking issues (12),
- Incomplete neighbourhood build-out (11)
- Preference from customers to walk along the water rather than along Queens Quay. (8)

2.4 CENTRAL WATERFRONT YORK ST. TO YONGE ST.

Inventory of Businesses and Analyses:

Vacancy: The vacancy rate for the central area of the BIA is at 8% of units, or a low (4%) of square footage for the area.



2.4

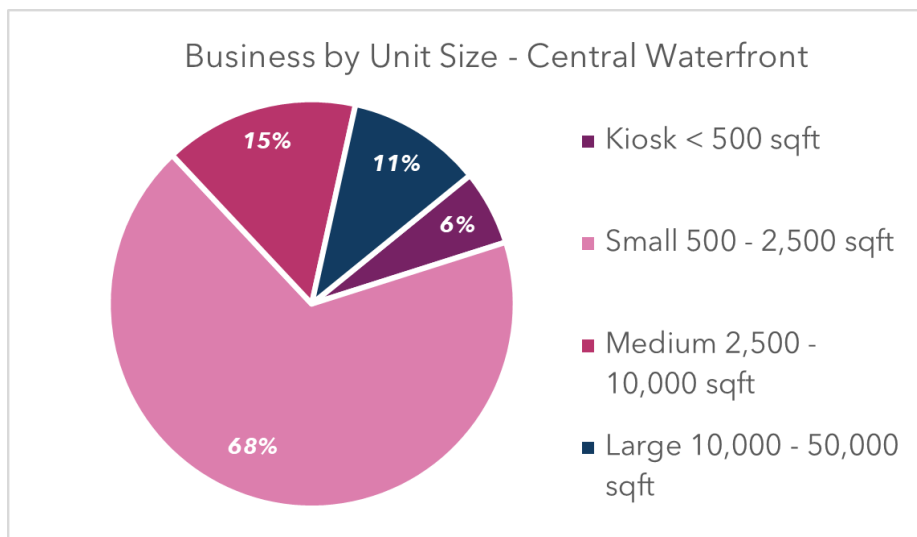
PATH-connected Retail: The central district is currently the only part of the waterfront connected to Toronto's PATH network. Over half (52%) of commercial units in this district (44/84 units) are connected to the PATH, making up 73% of the retail square footage in the area. Notably, the PATH-connected units allow for a significant variance in the size of space because of their location in multi-story mixed-use buildings rather than just at grade.

Chain Businesses: PATH-connected businesses were 79% chain businesses (places with four or more locations). Meanwhile, non-PATH-connected businesses are only 36% of chain businesses, suggesting that chain businesses likely benefit from being connected to the PATH. .

Business Categories: Food Service categories, with a majority of lunchtime food services, dominate the central area, representing 56% of all businesses counted in the area. Primarily resulting from the food courts located in the concentration of office towers.

Tourism Businesses: Notably, no businesses in this area are strictly tourism-related except for the Second City Comedy Club, likely because of the prominent influence of the workday population in the office towers and the Scotiabank Arena to the north. .

Business Makeup: The central area contains the most extensive variety in commercial space, with a significant number of commercial spaces in all categories, from small spaces like Kiosks (less than 500 square feet) to large spaces (between 10,000 and 50,000 square feet).



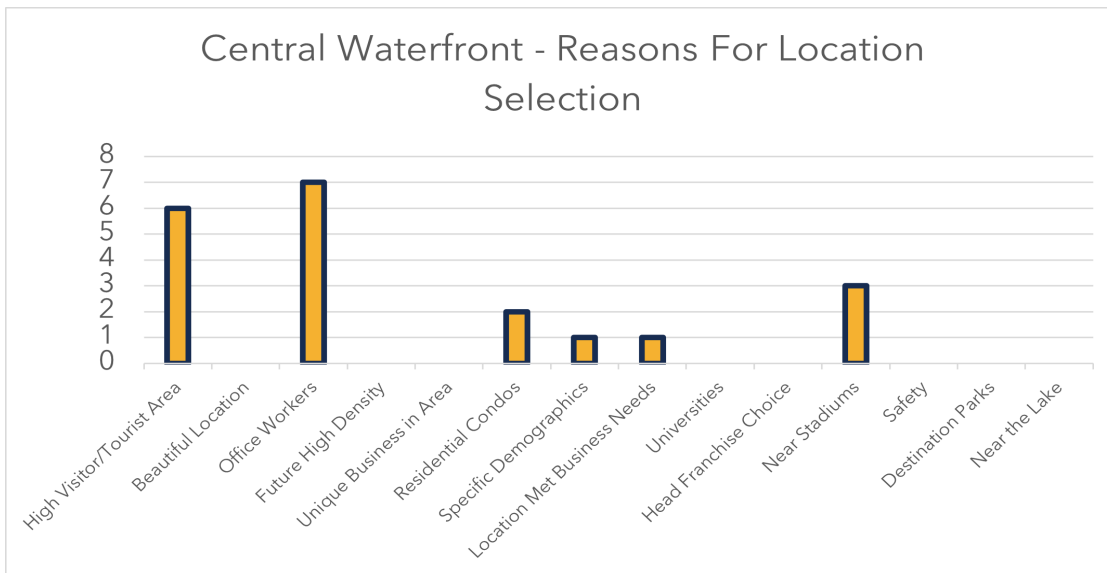
2.4

Business Survey Results:

Reasons for Choice in Location: Centrally located businesses were highly focused on the workday population, with visitor populations as a secondary target. Sit-down restaurants in the area also noted the nearby stadiums as a significant factor. Specific to the central area as compared to the others, businesses did not specify that they chose the location for its beauty and future density, further illustrating this district's unique position to the area as a PATH-connected office district above all else.

- Office Workers (7)
- High number of visitors and tourists (6)

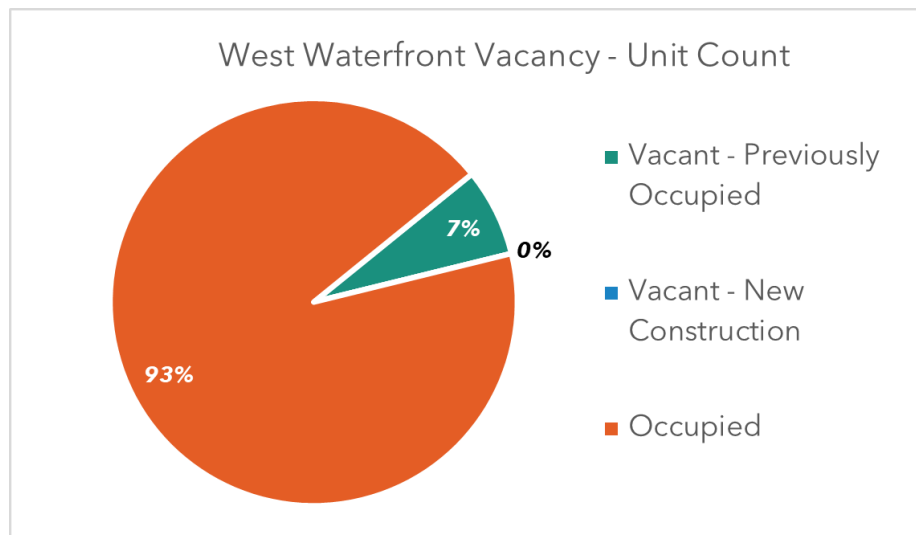
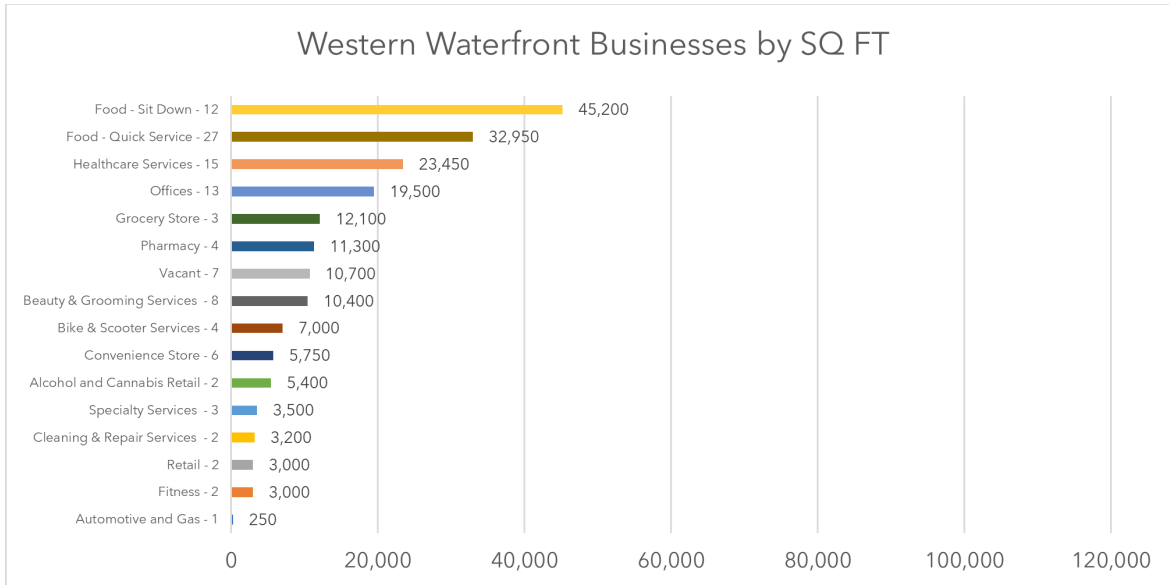
Issues Preventing Businesses from Locating in The Area: The central area businesses are interesting in that they did not specify any particularly unique reasons why businesses would not come to the waterfront as compared to businesses in the east and west, and comparatively did not indicate that the waterfront was difficult to get to (2) or that there was a preference for walking by the water rather than Queens Quay (2), out of a total of 15 respondents for the area.



2.5 WESTERN WATERFRONT STADIUM RD. TO YORK ST.

Inventory of Businesses and Analyses:

Vacancy: The vacancy rate for the western waterfront is moderate, with 7% of units or 12% by square footage in the area, all of which have been previously occupied and are in older buildings. The most notable vacancy in the area is the 14,000 square foot unit at 245 Queens Quay West, part of the Harbourfront Centre Campus, which holds a significant opportunity to become a destination on the waterfront.

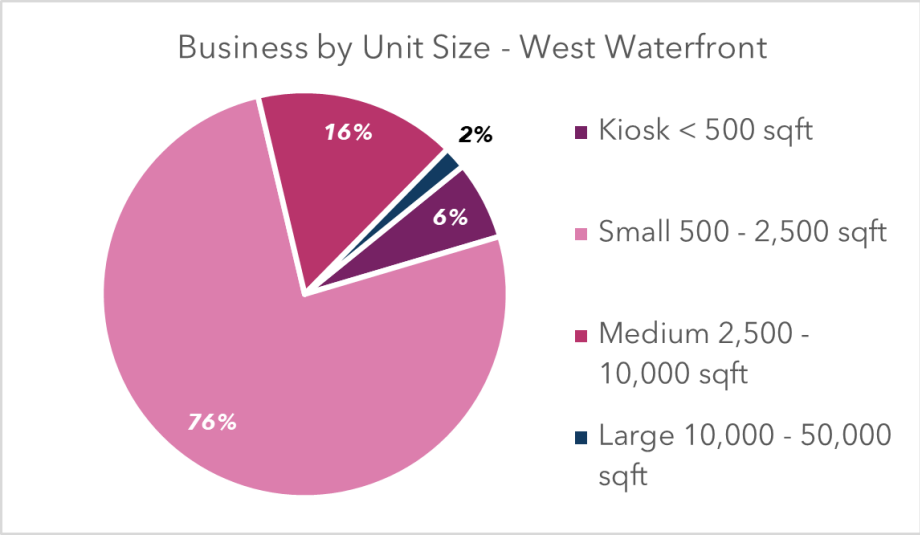


Non-Chain Businesses: The western area has by far the highest concentration of non-chain businesses at 66% of the total for the area.

Business Makeup: The primary makeup of businesses in the district is food service. However, more neighbourhood-type commercial uses can be found in the west, such as Healthcare Services, Pharmacies, and storefront offices.

2.5

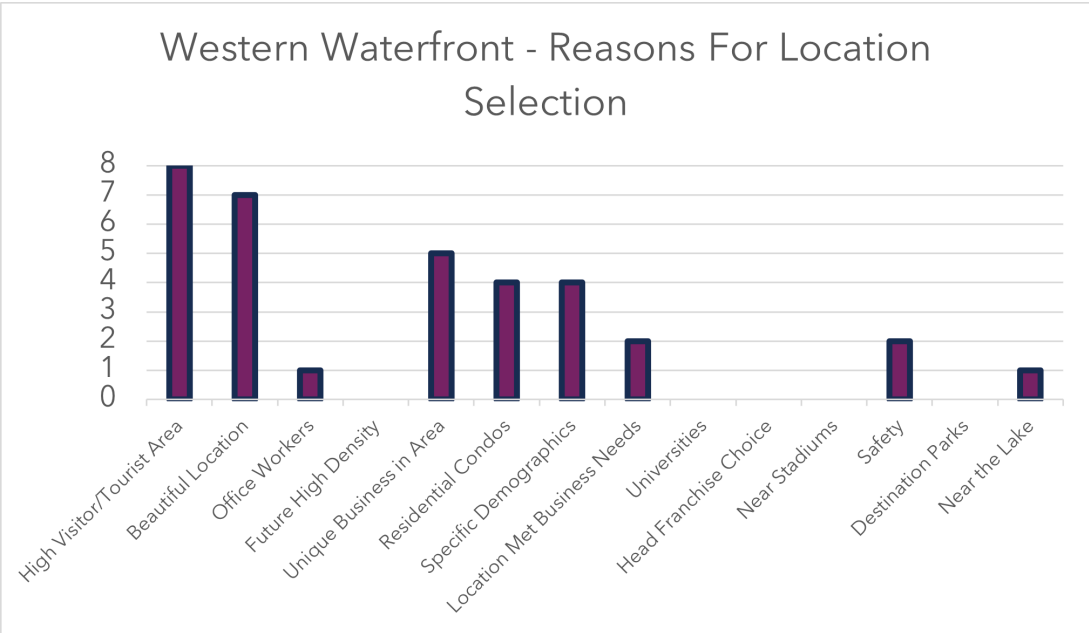
Small Commercial Spaces: While the west area has the highest count of business units at 112, it has the lowest total square footage of retail of the three areas at 210,700 square feet, making up just 23% of the BIA's commercial footprint. The units are predominantly small units, making up 75% of the number of units, the highest of any area in the BIA.



Business Survey Results:

Reasons for Choice in Location: Businesses in the west area primarily cited that they opened in the district due to the high numbers of visitors and tourists and the beautiful location. Notably, businesses in the west also emphasized that their businesses were unique to the area and targeted local residential populations or specific demographics for the area, which were insignificant factors for businesses located in other areas.

- High number of visitors & tourists (8)
- Beautiful Location (7)
- Unique Business to the area (5)
- Residential Density (4)
- Specific Demographics (4)



2.5

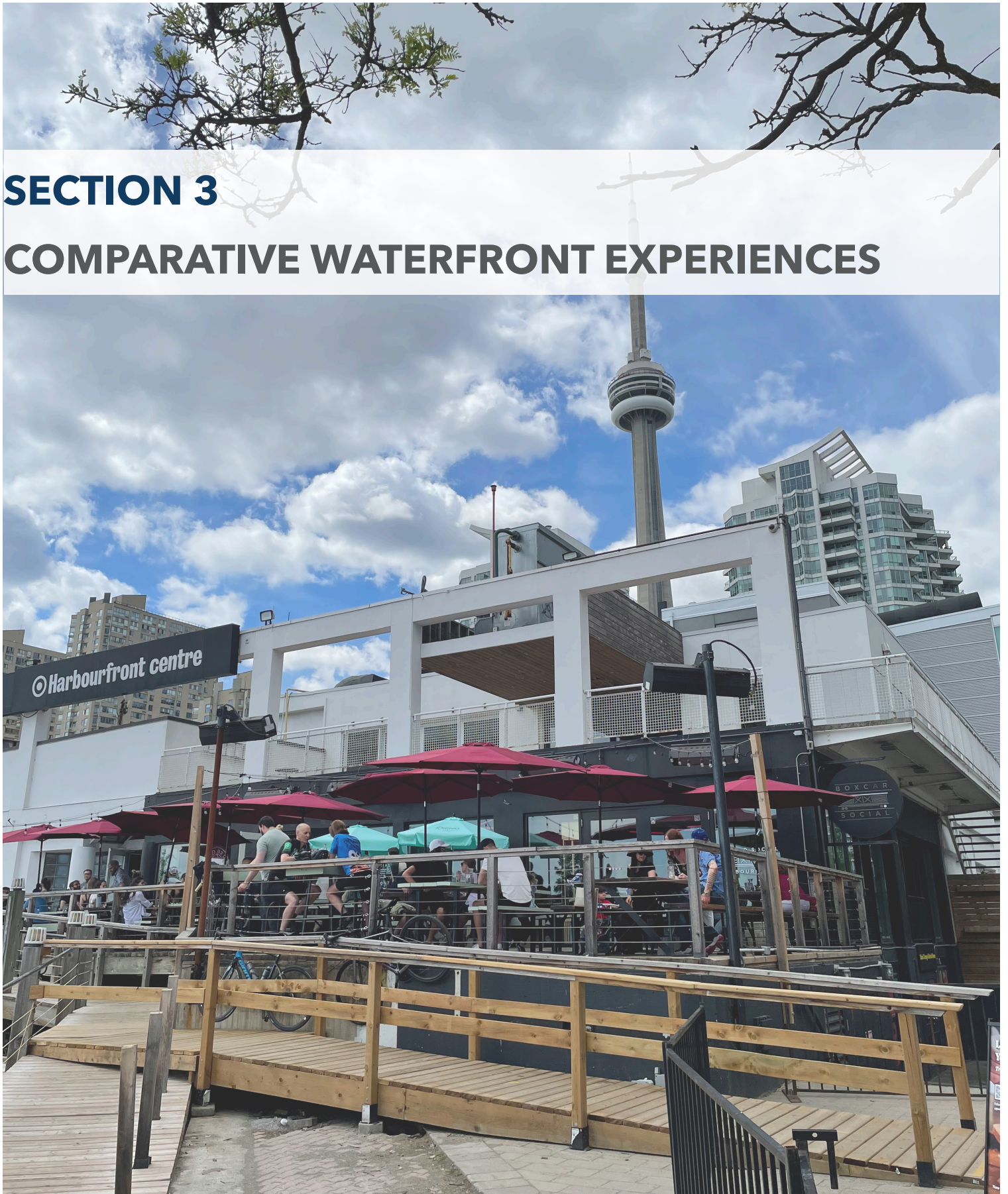
Issues Preventing Businesses from Locating in The Area: Businesses indicated factors that might be preventing other businesses from coming to the western waterfront might be:

- Difficult to get to because of underpasses, lack of transit, traffic, and parking issues (8),
- Lack of reason for customers to stay in the area (7)
- Preference from customers to walk along the water rather than along Queens Quay. (6)



SECTION 3

COMPARATIVE WATERFRONT EXPERIENCES



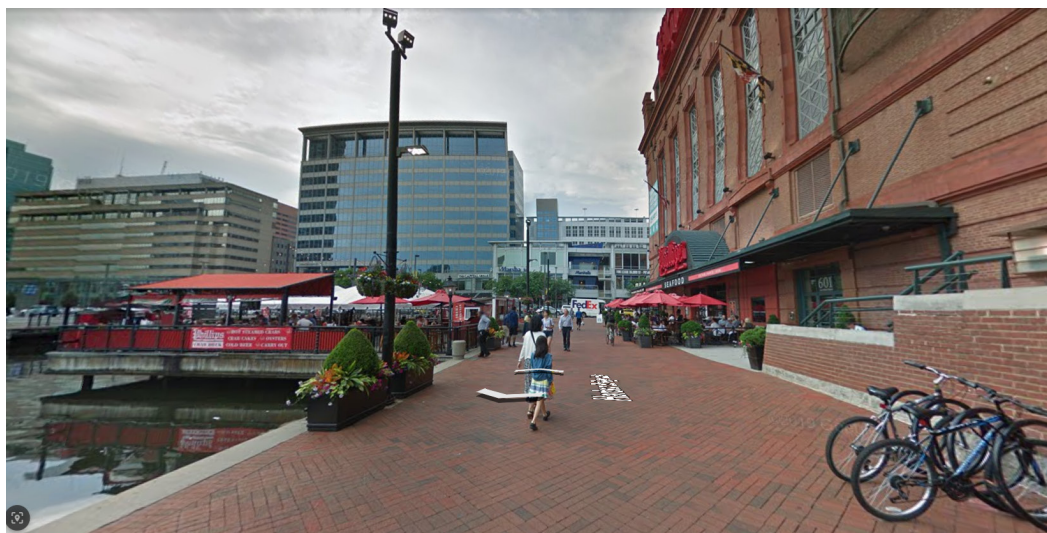
3.0 COMPARATIVE WATERFRONT EXPERIENCES

Cities worldwide have impressive waterfronts that offer an exhilarating experience and utilize commercial components as a core element that defines the experience. Based on the data collected through the Waterfront BIA's retail review, there is a notable de-emphasis on commercial spaces focusing on water adjacency as a primary draw for customers. For example, there are only five waters-edge patios along the waterfront in Toronto, able to accommodate approximately only 450-550 customers. Similarly, perhaps more drastic, is the almost complete absence of specialty retail on the waterfront. This is not necessarily a retail recruitment issue but a design issue, as developments across the waterfront have essentially turned their back on the water as an element that draws visitors to the area. Any businesses that do are spread thinly across the waterfront's length, preventing the opportunity for much-needed synergy in creating any one retail destination. As a unique strength that the waterfront has, compared to any other neighbourhood in the City of Toronto, this should be capitalized on in future developments and redevelopments to ensure that customer expectations are met when coming to this district. Below are some examples of waterfronts that utilize well-designed and intentional commercial spaces as part of their waterfront districts and may serve as inspiration for future waterfront retail opportunities.

Baltimore's Inner Harbour

Baltimore's Inner Harbour is very well connected to the rest of its downtown and is seen as the city's public face, utilizing commerce to ensure the waterfront experience is first class. A daisy chain of destination restaurants line their waterfront promenade, with prominent patios and tourism-focused businesses serving as points of interest. Floating patios can be found in places adjacent to their promenade, creating a unique space for visitors in warmer seasons. Activities for visitors are also very present, with popular destinations like the Maryland Science Center, Mr. Trash Wheel, heritage tall ships, and the National Aquarium co-located within the area. The area is notably similar to Toronto in its proximity to downtown; however, only low-rise non-residential buildings exist directly along Baltimore's waterfront.

Sample Businesses	Sample Activities	Sample Design Elements
Barnes & Noble - heritage building bookstore	National Aquarium	Purpose-built commercial spaces with large patios
Phillips Seafood - seafood restaurant with floating patio	Seven Foot Knoll Lighthouse - Museum / Lookout Point	Floating patios
Visitors Centre - place for tourists to get information	Mr. Trash Wheel - Environmental water cleaning installation	Continuous nodes of retail activity along promenade



BALTIMORE'S INNER HARBOUR, IMAGE FROM GOOGLE, 2024

3.0

Chicago's Riverfront

Pressed between Chicago's office and residential towers, highway, and river, Chicago's Riverwalk is a world-class example of a multi-faceted waterfront experience that combines landscape architecture, public art, and commerce to make places for people. Large patios connected to small service buildings host a mix of bars and restaurants along many sections of the Riverwalk, each patio playing a role in activating the walk, with elements such as live music, straw mazes, and bouncy slides for kids creating an exciting environment that is welcomed by visitors and residents alike. The Riverwalk also features large kiosk structures for boat cruise tickets to be purchased and boat launches for recreational kayaking, highlighting the importance of those activities as elements of the district. While there is a significant amount of commercially driven activity along the Chicago Riverwalk, there is a notable balance of non-commercial spaces dotted throughout the length of the district for people to enjoy, such as stepped terraces, lawn areas, decorative public benches, play structures, and public art woven cohesively into the riverwalks promenade. While the commercial elements of the Riverwalk do not occupy any formal retail space and are made up entirely of semi-permanent vendors, this district demonstrates how commercial elements can enhance a waterfront area through a consistency of activation that draws people in and provides options through which the public can enjoy the water adjacency.

Sample Businesses	Sample Activities	Sample Design Elements
The Northman - Beer Garden	Art on the Mart - video projection	Water-facing businesses
Chicago First Lady and Mercury Cruises ticket concession	Kids Zone attached to a Beer Garden	Semi-permanent commercial spaces as part of space activation
Urban Kayaks rental and launch point	Riverwalk Playground	Unique seating areas and public art activations on the promenade



CHICAGO RIVERFRONT, 2023



CHICAGO RIVERFRONT, 2023

3.0

District Wharf, Washington DC.

This waterfront area maximizes the commercial opportunities of their river edge walk, creating visually attractive and articulated storefronts that allow the businesses that occupy them to build a commercial personality through their façades, built form, and signage. These spaces, which run the length of the district’s waterfront, feature generous built-in patios, both on the building’s frontage and at the water’s edge. District Wharf also has a very well-programmed water’s edge promenade – with a floating stage and a year-round firepit area that is used to support free activities beyond the commercial spaces that line and activate the area. This district is comparable to Toronto’s waterfront in that the main-floor retail units are underneath multi-story mixed-use buildings. The commercial spaces are distinctly articulated along the water’s edge promenade, with residential and office entrances and amenities along the buildings’ rear. One building along District Wharf, The Channel, has a music venue built into it with \$3m of built-in soundproofing to ensure that residents are not bothered by the sounds. ([Washingtonian](#)).

Sample Businesses	Sample Activities	Sample Design Elements
The Anthem - Music Venue	Floating Stage	Large Integrated Patios
The Fish Market - Floating Market	Public Fire Pit - "Camp Wharf"	Articulated Façades
Bistro De Jour - Restaurant	Large waters-edge swing sets	Public Boat Launch



DISTRICT WHARF, WASHINGTON, IMAGE FROM GOOGLE, 2024



DISTRICT WHARF, WASHINGTON, IMAGE FROM GOOGLE, 2024

3.0

Pier 39, San Francisco

Pier 39 in San Francisco is notable in that it is essentially the opposite of Toronto’s waterfront, as it is a fully tourist-focused area comprised entirely of co-located specialty retailers and restaurants and activities curated to attract visitors. While unlikely to be a model for Toronto’s waterfront, similar elements that make these spaces successful should be considered, such as a densely co-located retail mix focused on appealing to visitors and year-round activations to draw people into the location, water-based attractions, and seafood restaurants. Learnings from Pier 39 could be incorporated into a strategy for centrally located spaces to be developed along the waterfront, such as Parliament Slip, Jack Layton Ferry Terminal, or Spadina Quay, that can act as a beacon for visitors to the waterfront.

Sample Businesses	Sample Activities	Sample Design Elements
Specialty Sword Retailer	San Francisco Carousel	Curated Façade Aesthetic
Chocolatier	Sea Lion Viewing Area	Scenic Viewpoints
Bubba Gump Shrimp Company	Piano Stairs	Destination Pier



PIER 39, SAN FRANCISCO, 2023



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SECTION 4

RECOMMENDATIONS



4.1 WHOLE WATERFRONT AREA

These recommendations are made by the Waterfront BIA and are influenced by the public intercepts and business surveys that were conducted throughout the area, observational walks of the district conducted with four retail consultants, and also analysis of the Toronto Retail Design Manual and the best practices that are outlined within it. The recommendations are organized by the different areas within the Waterfront BIA (Eastern, Central, and Western), and some recommendations would apply to the entire waterfront area.

THE WHOLE WATERFRONT BIA

This section will include recommendations that would benefit the waterfront as a whole and the recommendations will be addressing issues that are shared within all the different areas listed above.

Emphasise activity on the waterfront: World-class waterfronts highlight activity and recreation, including engaging public spaces, programmed events and activations, and complementary businesses that serve as points of engagement and activity. In isolation, none of these tactics can significantly move the needle, but in combination, their impact can be significant. The BIA should assist in recruiting and supporting the development of these types of activations, specifically along the ground-level of the buildings along the Water's Edge Promenade. In addition, an improvement in the nightlife activities that should be available at the waterfront will help establish a cultural identity for the area and encourage visitors to spend more time here.

Be intentional with the mix of retail space sizes: The use of commercial spaces is primarily defined by what the size of the retail spaces can accommodate, along with their strategic placement. For example, large units are used for grocery stores, medium units for sit-down restaurants, and small units for quick-service restaurants and convenience stores. With new developments, unit size and placement must be intentionally chosen and laid out to accommodate desired retail mix results.

Extending the shoulder seasons: Find ways to extend the shoulder seasons (Spring and Fall) by activating and sponsoring mid-season activities and installations. The dead of Winter is bad for retailers city-wide, and with the wind off of Lake Ontario, the impact of cold weather is heightened. The BIA should focus on programming and marketing to extend the season people see as acceptable to visit the waterfront into Spring and Fall by giving people a reason to come. This is of specific importance because many businesses on the waterfront are seasonal by nature, such as ice cream shops, bike rental businesses, and tour, charter and water taxi businesses that tend to close their doors in winter, when the BIA's efforts will have limited benefit.

Utilize co-location to create hubs for visitors: The waterfront experience isn't one thing; it is many, with anchor activity hubs such as Harbourfront Centre programming, Lighthouse Immersive shows, sports at the Rogers Centre and Scotiabank Arena, Sugar Beach, the Music Garden, and the Toronto Islands representing single trips for people coming to the area. Each of these visits serve as an opportunity to expand upon the consumer's journey through the co-location of businesses that serve the sample demographics visiting those anchor activity hubs. An excellent example of this in practice is sports bars on the waterfront at locations near the stadiums or restaurants with patios close to the Harbourfront Centre.

Traffic and parking: Construction and traffic issues are evident throughout the neighbourhood as the area continues to grow. Many businesses mentioned that one of the main issues customers complain about is the traffic and lack of parking. This can be one of the main reasons customers do not return to certain businesses on the waterfront. The Waterfront BIA conducted a parking study using a consultant in 2020 and can advocate for better signage for parking and for the City to put temporary traffic mitigation measures in place when multiple construction projects are taking place. Services such as Traffic Agents can help with better traffic flow and extra traffic safety in the neighbourhood at times of disruptions. In addition, the need for more customer parking within the waterfront can be addressed by arranging partnerships between parking management companies and businesses to establish a parking validation system for customers who are within walking distance of certain parking lots. The Waterfront BIA can step in as a connector and an assistant to businesses to help establish such a system and support business needs in the area

Utilize retail mix strategies to attract local customers: Having a solid mix of complementary businesses co-located can strengthen the business ecosystem. One example is locating an anchor business that brings customers to the area for necessities, such as a grocery store, pharmacy, gym or daycare, and co-locating businesses close to these that will benefit from that traffic, such as coffee shops and dry cleaners. An example of where this is being done exceptionally well is the Loblaws at Queens Quay and Lower Jarvis, where customers come to get groceries with access to convenient subsidized parking and, on the same trip, have access to a pharmacy, coffee shop, wine shop, shoe repair store, medical clinics, and clothing store. These strategies should be the focus while designing new retail spaces and modifying old ones.

Wayfinding: Better wayfinding, including maps of the waterfront, is needed throughout the area to improve the visitor experience and to guide the visitors to different sites, businesses, and activities once they are at the waterfront. Most people come to the waterfront to enjoy the lake or to visit the Islands and the parks, but once they arrive, they don't know where to go to get to the Islands or what else to do in the area. Better wayfinding tools, even temporary ones, would be beneficial to encourage and guide visitors to explore the entirety of the waterfront.

Building relationships with brokerages: The Waterfront BIA can also work with area brokerages and real estate firms to educate property managers and landlords about what type of businesses the visitors are asking for and what seems to be missing in the area. We can emphasize the importance of drawing exciting and unique businesses to the district that will attract visitors and provide them with a memorable experience. This report can act as an advocacy tool to inform area stakeholders what the community is asking for and to highlight the value of unique consumer-facing commercial spaces that bring in visitors year-round and not just during the warmer months.

4.2 EASTERN WATERFRONT YONGE ST. TO CHERRY ST.

The main issue with the eastern waterfront is that it is currently in the process of being developed, and the streetscape and the future LRT Transit Line have not yet been built out. This directly impacts the visitation and pedestrian numbers going into the area. This has created large 'dead-zones' in the area where there are limited consumer-facing commercial spaces, making the walking experience unpleasant and also creating a feeling of disconnection in the continuity of the waterfront. Recommendations to address this issue are listed below:

- Advocate for the accelerated build out of the Waterfront East LRT.
- Activate key areas central to the largest concentration of businesses impacted by 'dead-zones' that limit connectivity and discovery.
- Where safe and feasible to do so, soften some of the industrial atmosphere of the eastern waterfront through the installation of public art, to counteract the concrete nature. Continue to work collaboratively with those who may be redeveloping their street-facing façade.
- Take advantage of the Distillery District visitors that park on the waterfront due to lack of space on busy event days. There is an opportunity to keep them at the waterfront longer and to incentivize them to spend more time at waterfront businesses as part of their visit.
- Collaborate with properties such as Corus Quay and George Brown College Waterfront Campus to find ways to activate the Water's Edge Promenade.
- Work with Parks Forestry and Recreation to assist in improving conditions where businesses that front directly onto parks, such as at Sherbourne Common Park, where a water feature separates businesses from the parks and patio spaces are minimized. Helping to turn Sherbourne Common Park North into a more functional public space can help increase the foot traffic in the area and help the businesses directly adjacent to the park as well. In addition, highlight the need for utilizing the commercial space opportunity that is available right in the middle of Sherbourne Common Park South, where there is also a skating rink during the winter.



MAP SHOWING STRETCH OF STREET WITH LIMITED STREET-FACING ACTIVATION - BASE MAP FROM GOOGLE, 2023



AREA OF QUEENS QUAY EAST WITH MINIMAL STREET-FRONT RETAIL AND ACTIVATION

This 300m stretch of the eastern waterfront has limited activation or vibrant signage for activities to pull visitors further east or west that would like to explore the area but are not sure what is in the area for them to do. Possible solutions for this particular issue are highlighted in these recommendations as the area further develops and redevelops, including improved amenities in the future park, improved retail signage at existing buildings, more east-west wayfinding elements as well as collaboratively exploring options at the Redpath site to expand on public art opportunities and/or utilizing their street-facing building walls.

Site-Specific Recommendations for BIA Advocacy

Building	Recommendation
<p>One Yonge <i>2/5 buildings under construction</i></p>	<ul style="list-style-type: none"> • Expected to have at least one hotel. • Major retail location opportunities at Queens Quay and Yonge intersection. Encourage and support development to place 'anchor' businesses that create daily traffic through the site. • Advocate for second-floor PATH connections (including access points from street-level into the PATH).
<p>Yonge Street Slip Park <i>Pre-planning, expected to be completed with Waterfront East LRT construction.</i></p>	<ul style="list-style-type: none"> • Major landmark and public art opportunity where Toronto's famous Yonge Street and waterfront meet. • High-visibility location could be popular in attracting markets and activations. • Potential market priority zone.
<p>Pier 27 <i>4 residences complete, 1 more in planning</i></p>	<ul style="list-style-type: none"> • Advocate for attractive Queens Quay facing retail/restaurants as part of new buildings with activated façades and clear entryways.
<p>Sugar Wharf Park <i>Park, in planning and early construction</i></p>	<ul style="list-style-type: none"> • Will be designed to service the new primary school, likely to include children's play structures. • Advocate for joint planning with other Queens Quay parks to spread amenities and avoid amenity-duplication to encourage east-west exploration. (e.g. this park should not have a skating rink as Sherbourne Common nearby already has one.)
<p>100 Queens Quay East (Office) and Sugar Wharf Condos <i>(2/5 built)</i></p>	<ul style="list-style-type: none"> • Advocate for expedited development of above-ground PATH connections under the Gardiner Expressway all the way to this site. • Expand signage directing people to second floor retail locations and Downes St businesses. • Enhance the north-south street connections to help draw customers north of Queens Quay towards Downes. • Ensure that Sugar Wharf Park connects to the building and does not hide 100 Queens Quay frontages.
<p>10 Lower Jarvis (Loblaws site) <i>Redevelopment expected</i></p>	<ul style="list-style-type: none"> • Encourage highly-visible retail and public access connectivity points on Queens Quay and Downes frontages that encourage east-west connectivity
<p>Redpath <i>Industrial facility</i></p>	<ul style="list-style-type: none"> • Work with Redpath to understand future opportunities for retail or activation experiences. • Encourage Redpath to take advantage of major Queen's Quay-facing public art and placemaking opportunities along their street-fronting facade with further development of the property.

Building	Recommendation
Daniels Waterfront City of the Arts	<ul style="list-style-type: none"> Strong retail presence in 'The Yard' has low awareness due to difficulties of signage and visual cues indicating its location. BIA should encourage improved signage around the Queens Quay side of the building.
Sugar Beach, Water's Edge Promenade, Corus Quay and George Brown Campus <i>Multiple buildings with growing college involvement</i>	<ul style="list-style-type: none"> Very strong interest from businesses in retail activation partnerships at Sugar Beach. Explore retail activation partnerships that encourage taking advantage of the Water's Edge Promenade.
Waterfront Innovation Centre <i>Construction complete</i>	<ul style="list-style-type: none"> Support vacant retail/restaurant locations by promoting the area's growth potential as a visitor destination and encourage temporary pop-ups.
178/180 Queens Quay East <i>In early planning (currently a parking lot)</i>	<ul style="list-style-type: none"> Encourage highly-visible retail on Queens Quay and other future main-street frontages that encourage east-west connectivity.
Lakeside Residences <i>Early construction</i>	<ul style="list-style-type: none"> Retail expected to be targeted to local residents. New east-west street should maximize retail frontages and public access points to encourage use, especially at street corners.
Monde and Sherbourne Common North	<ul style="list-style-type: none"> Park design blocks foot traffic accessibility and signage of Monde retail. Without a significant high-quality experience at the park to draw users in, the visible water's edge draws users away. BIA should advocate for significant redesign of the site and upgrade existing playground equipment (e.g. dog park or other specific uses that add value in the waterfront amenity mix and attracts people).
Sherbourne Common South <i>Park with skating rink</i>	<ul style="list-style-type: none"> Empty retail location in park building ready to be activated - should be a WBIA priority in the area (including to support skating rink activations in Winter). Market priority zone on eastern waterfront, along with Water's Edge Promenade to Sugar Beach (over new Sugar Wharf Park).
Bayside Village <i>4 of six buildings complete (1 of 2 office)</i>	<ul style="list-style-type: none"> Encourage improved visibility, wayfinding or visual cues to help identify business locations. WBIA to advocate for increased signage allowances, better utilization of portal and patio-spaces surrounding the site.
Quayside and Parliament Slip <i>Redevelopment in planning</i>	<ul style="list-style-type: none"> Advocate for not only north-south connectivity and flow of visitors between Quayside and Distillery District, but also for east-west connectivity encouraging exploration along the water's edge and Queens Quay. Encourage design elements that attract anchor tenants for year-round and daily visitors. Ensure high visibility of ground-level commercial space and the addition of unique and attractive retail uses. Maximize water-focused and on-the-water activation as part of the Parliament Slip redevelopment.

4.3 CENTRAL WATERFRONT YORK ST. TO YONGE ST.

The central waterfront is the hub for most of the office towers within the area, and their primary struggle is with the return of workers to the office, or lack thereof, and the issues their customers experience with traffic and parking. The recommendations for these issues are:

- To promote and support more “return-to-work” experiences throughout the central waterfront area to encourage workers to come to the office on a more regular basis in order to help businesses go back to pre-pandemic levels.
- Find ways to soften the on-street experience for pedestrians between the office towers by commissioning engaging public art and public spaces using placemaking strategies.
- Help by increasing awareness of the businesses in the area to the residential neighbourhoods that are within walking distance. This can be done through advertising and also creating unique activations and events to attract customers from a bigger radius.
- Advocate to the City to increase signage for parking options in the area and guide drivers more effectively to the different parking options.
- Encourage businesses to extend their hours beyond workdays to serve residents and visitors, and especially encourage staying open on special event days.

Site-Specific Recommendations for BIA Advocacy

Building	Recommendation
Shops at One York	<ul style="list-style-type: none"> • Multiple levels of retail are difficult to navigate and discover. Assist to promote through promotion of experience to local area users.
WaterPark Place	<ul style="list-style-type: none"> • Encourage food court and retail to stay open on evenings and weekends, and especially for major event days (e.g. NYE Fireworks).
Conference Site (11 Bay Street) <i>Redevelopment expected</i>	<ul style="list-style-type: none"> • Support above-ground PATH connection from WaterPark Place to Westin Harbour Castle and the Ferry Terminal. • Intersection near Ferry Terminal (Bay St. and Queens Quay) will have large interest from retail business. BIA should encourage maximizing retail frontage over lobby space.
Jack Layton Ferry Terminal and Harbour Square Park	<ul style="list-style-type: none"> • Encourage collaboration with Westin Harbour Castle to support retail where hotel faces the Ferry Terminal entrance. • Harbour Square Park area is often utilized for major events. Supported by the BIA, but second priority for sponsorship as visitation is already high.
Westin Harbour Castle	<ul style="list-style-type: none"> • Redevelopment of Queens Quay entrance area along with new Yonge Street Slip Park can be used to enhance retail opportunities along Queens Quay. • Encourage conversion of west-face of building for retail or temporary/seasonal tenants targeting Ferry Terminal users.

4.4 WESTERN WATERFRONT STADIUM RD. TO YORK ST.

The main concern with the western waterfront is the restrictive exterior building typology. Due to the older style of buildings in the area, there are a lot of awkwardly spaced overhangs and columns that take away from the visibility of signage and from the public realm available to the businesses directly in front of their store. In addition, there are multiple safety concerns that have come up while talking to area businesses.

- The main recommendation is for the WBIA to support businesses in finding solutions to address these façade issues. This can be done by advocating for better opportunities such as improved lighting, and loosening signage requirements that property managers require. Another opportunity is to potentially work with the city to get a façade improvement grant for an entire arcade and prove out how the frontage of the building could be improved to better serve retail from a visibility/discoverability standpoint.
- While the businesses in the western part of the BIA are not particularly destinations, the types of storefront businesses might be appropriate for this residential section of the neighbourhood. However, if in the future there are redevelopment opportunities, the retail units should be designed to attract prime retail. More ambitious water-themed retail and experiences (e.g., arts and culture, museums, retail, and floating bars) are needed which would require significant site re-development.
- Find ways to make a sustainable visitor experience on the south side of Queens Quay with exciting developments in the Bathurst Quay area. These developments could help to sustain tourism interest in the area while also having minimum impact on residents.
- Continue to work with the different police divisions within the area to ensure safety is prioritized and that there is a visible police presence in the area.

Site-Specific Recommendations for BIA Advocacy

Building	Recommendation
Bathurst Quay, Malting Silos and Billy Bishop Toronto City Airport	<ul style="list-style-type: none"> • Support City of Toronto plans for development of the area, in particular as an arts and culture hub. (Spadina Pier Park, Malting Silos refurbishment and lighting strategy, Canada Ireland Foundation's Corleck Building) • WBIA priority area for events sponsorship to support visitation and awareness. • Advocate for arrival or gateway signage for Billy Bishop Toronto City Airport.
545 Lake Shore Blvd. West <i>Candere site to be redeveloped, currently a City of Toronto shelter</i>	<ul style="list-style-type: none"> • This intersection is the first impression that visitors arriving to Toronto at the Billy Bishop Toronto City Airport will have. • Redevelopment of this site may be the last opportunity to create a unique and interesting commercial experience and public realm at street level.
Peter Street Basin and The Quay <i>Redevelopment underway with additional redevelopment expected</i>	<ul style="list-style-type: none"> • The Quay is a site being redeveloped to enhance and increase its on-street retail presence • Redeveloped retail will be difficult to access and promote due to limits of Peter Street Basin - a City Park that is primarily a water lot in very poor condition and a regular nuisance for cleaning. • BIA should advocate for significant improvements at Peter Street Basin, or to be filled-in. This could mean a major refurbishment, e.g. water lot with floating patios, kayak and canoe landings. Alternatively, the basin should be filled-in to act as a public square and seating area in tandem with redeveloped retail under construction.

Building	Recommendation
<p>Arcade Façade Buildings <i>Examples: Harbour Point (250/270/290 QQW)</i> <i>King's Landing (460/480 QQW)</i></p>	<ul style="list-style-type: none"> • Encourage and support improvement of retail façades, including patios.
<p>Rees Park <i>Current parking, planned to become a park</i></p>	<ul style="list-style-type: none"> • Portal in The Quay development to the west includes a direct link to Peter Street Basin Park. • Encourage a new park design that includes: Bentway/Under Gardiner coordination, commercial partnership opportunities, and potential skating rink or other engaging activity. • Advocacy to maintain some parking as an underground lot, or with offsets such as improved parking wayfinding signage, bike parking valet hub, or a tour bus parking zone.
<p>Raddison Blu (245 Queens Quay W) <i>Redevelopment expected</i></p>	<ul style="list-style-type: none"> • Emphasize need for improved public realm around Robertson Crescent to be coordinated with any future redevelopment of site.
<p>Harbourfront Centre</p>	<ul style="list-style-type: none"> • Major destination that WBIA does not prioritize sponsorship funding for as it has very high visitation. • Coordination with management to support recruitment/utilization of retail/commercial opportunities through visitor data sharing, general area promotion.
<p>Queens Quay Terminal</p>	<ul style="list-style-type: none"> • Encourage external signage expansion to identify internal tenants and amenities, and as a known signature and destination building on the waterfront.



APPENDICES



APPENDIX 1: FUTURE OF THE WATERFRONT

Retail Development: Under and Pre-Construction: Waterfront BIA Area

Eastern Waterfront				
Address	Development	Mixed-Use Residential	Mixed-Use Office	Retail GFA Sqft.
95 Lakeshore Blvd E	Sugar Wharf (Phase 1)	✓		76133
263 Queens Quay E	Aqualuna	✓		30214
1 Yonge St	Pinnacle One Yonge (Phases 1 to 3)	✓	✓	56898
251 Queens Quay E	T3 Bayside (2 buildings)		✓	21000
55 Lake Shore Blvd E	Sugar Wharf (Phase 2)	✓		143472
162 Queens Quay E	Quay House	✓		8719
Western Waterfront				
350 to 370 Queens Quay W	The Quay Tower Three	✓	✓	-5296
Under Construction Total				331,140

Eastern Waterfront				
Address	Development	Mixed-Use Residential	Mixed-Use Office	Retail GFA Sqft.
7 to 25 Queens Quay E	Pier 27 (Phase 3)			No
Bonnycastle to Victory Mills Silos	Quayside	✓	✓	Yes
1 Yonge St	Pinnacle One Yonge (Phases 4 to 5)		✓	61160
180 Queens Quay E	Rom-Grand Waterfront Ltd	✓		8719
351 Lake Shore Blvd E	Dream Unlimited & Great Gulf	✓		122708
307 Lake Shore Blvd E	Plaza Partners	✓		No
324 Cherry St	3C	✓	✓	Yes
215 Lake Shore Blvd E	Lakeside Residences		✓	19619
253 Queens Quay E	R6 Bayside	✓		No
Central Waterfront				
30 Bay St	The Hub		✓	24348
Western Waterfront				
545 Lake Shore Blvd W	545 Lakeshore Blvd W	✓	✓	41398
200 Queens Quay W	200 Queens Quay W	✓		3875
Pre-Construction Total:				281,827

Under Construction + Pre-Construction Total Retail:	612,967
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APPENDIX 2: VACANT UNIT INVENTORY

Building Name	Area of Neighbourhood	Type of frontage	Estimated Sqft.	New Construction
100 Queens Quay East - Sugar Wharf	East	Internal	3300	New Construction
100 Queens Quay East - Sugar Wharf	East	Internal	7000	New Construction
100 Queens Quay East - Sugar Wharf	East	Internal	8500	New Construction
Aquabella	East	Street-facing	2500	New Construction
Aquabella	East	Street-facing	2500	New Construction
Aquabella	East	Street-facing	2500	New Construction
Aquabella	East	Street-facing	2500	New Construction
Aqualina	East	Street-facing	700	New Construction
Aqualina	East	Street-facing	1000	New Construction
Aqualina	East	Street-facing	1250	New Construction
Aqualina	East	Street-facing	2050	New Construction
Aqualina	East	Street-facing	2100	New Construction
Aqualina	East	Street-facing	2100	New Construction
Aqualina	East	Street-facing	4300	New Construction
Aquavista	East	Street-facing	27500	New Construction
Daniels Waterfront	East	Street-facing	1500	New Construction
Daniels Waterfront	East	Street-facing	1500	New Construction
Daniels Waterfront	East	Street-facing	1500	New Construction
Monde	East	Street-facing	2500	New Construction
Monde	East	Street-facing	2500	New Construction
One Yonge	East	Street-facing	4000	
Pier 27	East	Street-facing	2500	New Construction
Waterfront Innovation Centre	East	Street-facing	1500	New Construction
Waterfront Innovation Centre	East	Street-facing	7500	New Construction
Waterfront Innovation Centre	East	Street-facing	12500	New Construction
Pinnacle Centre	Central	Street-facing	1000	New Construction
Shops at One York	Central	Internal	700	
Shops at One York	Central	Internal	800	
Shops at One York	Central	Internal	900	
Shops at One York	Central	Internal	1750	
Shops at One York	Central	Internal	6000	New Construction
Waterpark Place	Central	Internal	500	
500 Queens Quay W	West	Street-facing	1500	
500 Queens Quay W	West	Street-facing	1500	
550 Queens Quay W	West	Street-facing	1200	
Harbour Point	West	Street-facing	1000	
Harbourfront Centre	West	Street-facing	2000	
Harbourfront Centre	West	Street-facing	14000	
Queen's Quay Terminal	West	Internal	1500	
The Quay	West	Street-facing	2000	

APPENDIX 3: RETAIL UNIT INVENTORY

Business Name	Building Name	Area of Neighbourhood	Type of frontage	Estimated Sqft.
Dark Horse Espresso Bar	100 Queens Quay East - Sugar Wharf	East	Internal	700
Farm Boy	100 Queens Quay East - Sugar Wharf	East	Internal	30000
LCBO	100 Queens Quay East - Sugar Wharf	East	Street-facing	24000
Nedco Electrical Supplies	200 Queens Quay E	East	Street-facing	6000
Summerset Studio	200 Queens Quay E	East	Street-facing office	1200
Porsche Downtown	259 Lake Shore Blvd E	East	Street-facing	45000
Budget Car Rental	307 Lake Shore Blvd E	East	Street-facing	15000
Gong Cha	Aqualina	East	Street-facing	1000
Lake Dental Centre	Aqualina	East	Street-facing	2000
Maverick Burger Co.	Aqualina	East	Street-facing	1500
Nforno Pizza	Aqualina	East	Street-facing	2000
Scotiabank	Aqualina	East	Street-facing	3000
Irene Restaurant	Corus Quay	East	Street-facing	2000
La Prep	Corus Quay	East	Street-facing	1500
INS Store	Daniels Waterfront	East	Street-facing	1200
RBC Royal Bank of Canada	Daniels Waterfront	East	Street-facing	3000
Tim Hortons	Daniels Waterfront	East	Street-facing	800
Triangle Physiotherapy	Daniels Waterfront	East	Street-facing	1200
Booster Juice	Daniels Waterfront - The Yard	East	Street-facing	600
Chaska Indian Street Food	Daniels Waterfront - The Yard	East	Street-facing	600
Chic Bridals/Candy Prom & Evening	Daniels Waterfront - The Yard	East	Street-facing	2000
Fresh Burrito	Daniels Waterfront - The Yard	East	Street-facing	500
Freshii	Daniels Waterfront - The Yard	East	Street-facing	500
GLB Brewpub & Store	Daniels Waterfront - The Yard	East	Street-facing	3000
INS Market	Daniels Waterfront - The Yard	East	Street-facing	600
Montfort Mediterranean Grill	Daniels Waterfront - The Yard	East	Street-facing	600
Nails For You Lakeshore	Daniels Waterfront - The Yard	East	Street-facing	400
PI CO Pizza Bar	Daniels Waterfront - The Yard	East	Street-facing	600
South St Burger	Daniels Waterfront - The Yard	East	Street-facing	800
Dry Cleaner	Loblaws Lower Jarvis	East	Internal	1000
Joe Fresh	Loblaws Lower Jarvis	East	Street-facing	8500
Loblaws	Loblaws Lower Jarvis	East	Street-facing	64000
Moneysworth and Best	Loblaws Lower Jarvis	East	Internal	1000
President's Choice Financial (CIBC)	Loblaws Lower Jarvis	East	Internal	1000
Primacy Medical Centre	Loblaws Lower Jarvis	East	Internal	2500
Queens Quay Cardiology	Loblaws Lower Jarvis	East	Internal	2000
Starbucks	Loblaws Lower Jarvis	East	Internal	200
The Mobile Shop	Loblaws Lower Jarvis	East	Internal	250
Theodore & Pringle Optical	Loblaws Lower Jarvis	East	Internal	1200
Wine Rack	Loblaws Lower Jarvis	East	Internal	1000
AM2PM Convenience	Monde	East	Street-facing	800
Kinetic Labs	Monde	East	Street-facing	2000
Mike-Paul Atelier	Monde	East	Street-facing	2500
Monde Dental	Monde	East	Street-facing	1500
Pizzaville	Monde	East	Street-facing	1500
Popeyes	Monde	East	Street-facing	1500
Thisel Cannabis	Monde	East	Street-facing	1000
Espresso Cultura	One Yonge	East	Street-facing	1500
Freshii	One Yonge	East	Street-facing	1500
INS Market	One Yonge	East	Street-facing	750
Lighthouse Artspace	One Yonge	East	Internal	40000
One Yonge Dental	One Yonge	East	Internal	2000
Art Hub 27	Pier 27	East	Street-facing office	4000
NBA Courtside Restaurant	Pier 27	East	Street-facing	5000
BMO	Pinnacle One	East	Street-facing	3000
CIBC	Waterfront Innovation Centre	East	Street-facing	1500
Alexandro's Gyros	5 Queens Quay W	Central	Street-facing	500
Harbour Sixty Steakhouse	60 Harbour St	Central	Street-facing	12000
Chris Cadas Dental	Harbour Square	Central	Street-facing	1500
Church's Texas Chicken	Harbour Square	Central	Street-facing	1500
Prayosha Threading and Wax Bar	Harbour Square	Central	Street-facing	1000
Remax Condos Plus	Harbour Square	Central	Street-facing office	3000
Scotiabank	Harbour Square	Central	Street-facing	2000
Cuppa Tea	One York Quay	Central	Street-facing	800
Fancy Nails & Spa	One York Quay	Central	Street-facing	400
Morning Café	One York Quay	Central	Street-facing	1500
Nav Grocery Store	One York Quay	Central	Street-facing	1500
Net Exchange	One York Quay	Central	Street-facing	300

One East Hair Salon	One York Quay	Central	Street-facing	500
1Clinic Pharmacy	Pinnacle Centre	Central	Street-facing	4000
Hair Story	Pinnacle Centre	Central	Street-facing	1000
Harbour Dental Centre	Pinnacle Centre	Central	Street-facing	4000
Harbourview Convenience	Pinnacle Centre	Central	Street-facing	500
Kibo Sushi	Pinnacle Centre	Central	Street-facing	500
Mama Lees	Pinnacle Centre	Central	Street-facing	500
Miller Tavern	Pinnacle Centre	Central	Street-facing	2000
Mr Pizza	Pinnacle Centre	Central	Street-facing	500
Platis Custom 1 Hour Cleaners	Pinnacle Centre	Central	Street-facing	1200
Remax	Pinnacle Centre	Central	Street-facing office	1000
Second Cup / Pita Pit	Pinnacle Centre	Central	Street-facing	1500
Subway	Pinnacle Centre	Central	Street-facing	850
The Butcher Chef	Pinnacle Centre	Central	Street-facing	3000
The Fox on Bay	Pinnacle Centre	Central	Street-facing	1500
Firkin Pubs	Shoppes of the World Trade Centre	Central	Street-facing	6000
Harbourfront Cannabis	Shoppes of the World Trade Centre	Central	Street-facing	2000
My Roti Place/My Dosa Place	Shoppes of the World Trade Centre	Central	Street-facing	1200
Oyshi Sushi	Shoppes of the World Trade Centre	Central	Street-facing	1500
Royal LePage - Terrequity	Shoppes of the World Trade Centre	Central	Street-facing office	2000
The Kitchen Table	Shoppes of the World Trade Centre	Central	Street-facing	2500
Tim Hortons	Shoppes of the World Trade Centre	Central	Street-facing	1200
Dollarama	Shops at One York	Central	Internal	10000
Glamour Secret / Trade Secret	Shops at One York	Central	Internal	1600
Health One	Shops at One York	Central	Internal	10000
Kinka Izakaya	Shops at One York	Central	Street-facing	2000
Kinton Ramen	Shops at One York	Central	Street-facing	2000
Nature's Emporium	Shops at One York	Central	Internal	25000
One York Food Hall by O&B	Shops at One York	Central	Internal	15000
Pure Fitness	Shops at One York	Central	Internal	25000
Rolltation	Shops at One York	Central	Internal	1000
South St Burger	Shops at One York	Central	Internal	1500
Taylor and Colt	Shops at One York	Central	Internal	1000
The Kryz	Shops at One York	Central	Internal	800
The Menkes Shop	Shops at One York	Central	Street-facing	1000
The Second City	Shops at One York	Central	Internal	28000
Winners	Shops at One York	Central	Internal	16000
A&W	Waterpark Place	Central	Internal	1300
Aroma Espresso Bar	Waterpark Place	Central	Street-facing	2000
Fast Fresh Foods	Waterpark Place	Central	Internal	1450
Fleet Complete	Waterpark Place	Central	Internal office	8000
Freshwest Grill	Waterpark Place	Central	Internal	1450
Impact Kitchen	Waterpark Place	Central	Street-facing	2000
INS Market	Waterpark Place	Central	Internal	500
Jimmy the Greek	Waterpark Place	Central	Internal	1450
Koha Pacific Kitchen	Waterpark Place	Central	Internal	1200
Kupfert & Kim	Waterpark Place	Central	Internal	1450
Maverick for Men	Waterpark Place	Central	Internal	1500
Miku	Waterpark Place	Central	Internal	13500
Mos Mos	Waterpark Place	Central	Internal	400
Olly Frescos	Waterpark Place	Central	Internal	1500
RBC Royal Bank of Canada	Waterpark Place	Central	Internal	3000
RBC Royal Bank of Canada Insurance	Waterpark Place	Central	Internal	1500
Rexall	Waterpark Place	Central	Internal	8500
Shanghai 360	Waterpark Place	Central	Internal	1450
Subway	Waterpark Place	Central	Internal	1450
Szechuan Express	Waterpark Place	Central	Internal	1450
Tim Hortons	Waterpark Place	Central	Internal	1450
Villa Madina	Waterpark Place	Central	Internal	1450
Waterpark Athletics	Waterpark Place	Central	Internal	3000
Bar & Lounge	Westin Harbour Castle Hotel	Central	Internal	1500
Don Alfonso 1890	Westin Harbour Castle Hotel	Central	Internal	5000
Harbour Coffee Bar	Westin Harbour Castle Hotel	Central	Internal	250
Harbour Gifts	Westin Harbour Castle Hotel	Central	Internal	400
The Mizzen Restaurant	Westin Harbour Castle Hotel	Central	Internal	5000
BeaverTails	145 Queens Quay W	West	Street-facing	2000
Gift Shop	145 Queens Quay W	West	Street-facing	250
I Love Churro/Lisa's Ice Cream	145 Queens Quay W	West	Concession	250
Toronto Harbour Tours (concession)	145 Queens Quay W	West	Street-facing	250
Amsterdam Brewhouse	245 Queens Quay W	West	Street-facing	14000
Harbourfront Centre Sailing & Powerboating	275 Queens Quay W	West	Street-facing	2500
Pancho's Bakery - I Love Churros	275 Queens Quay W	West	Concession	250
Harbourfront Canoe & Kayak Centre	283 Queens Quay W	West	Street-facing	750

Dentist on Harbourfront	500 Queens Quay W	West	Street-facing	1500
Duende Beauty Lounge	500 Queens Quay W	West	Street-facing	1500
Golden Tripod Group LTD	500 Queens Quay W	West	Street-facing	1500
Hyde Law	500 Queens Quay W	West	Street-facing office	1500
Implant Dentistry	500 Queens Quay W	West	Street-facing	1500
L Wang Accountants	500 Queens Quay W	West	Street-facing office	1500
Mandville Private Client Inc.	500 Queens Quay W	West	Street-facing office	1500
Master your Mind	500 Queens Quay W	West	Street-facing	1500
Symmetry Motions Physical Therapy	500 Queens Quay W	West	Street-facing	1500
Common Ground	550 Queens Quay W	West	Street-facing	1000
Iruka Sushi	550 Queens Quay W	West	Street-facing	500
Lakefront Clinics	550 Queens Quay W	West	Street-facing	1200
Remedy's Rx Lakefront Medical Pharmacy	550 Queens Quay W	West	Street-facing	1200
Ride One	550 Queens Quay W	West	Street-facing	1500
Circle K	553 Lake Shore Blvd W	West	Street-facing	1000
ESSO	553 Lake Shore Blvd W	West	Street-facing	250
Tim Hortons	553 Lake Shore Blvd W	West	Street-facing	250
Hildan Cleaners	Aqua	West	Street-facing	2000
Lakeview Convenience	Aqua	West	Street-facing	2000
Lakeview Tower Beauty Salon	Aqua	West	Street-facing	2000
Bloom Pharmacy	Harbour Point	West	Street-facing	1000
Bubble Baby	Harbour Point	West	Street-facing	500
Golden Eggs	Harbour Point	West	Street-facing	1000
Harbour Nails 2	Harbour Point	West	Street-facing	1000
Harbourfront Chiropractic	Harbour Point	West	Street-facing	1000
Harvey's/Swiss Chalet	Harbour Point	West	Street-facing	2000
Ice Creamonology	Harbour Point	West	Street-facing	500
Indian Roti House	Harbour Point	West	Street-facing	1000
Pizzaiole	Harbour Point	West	Street-facing	1000
Rabba Fine Foods	Harbour Point	West	Street-facing	1600
The UPS Store	Harbour Point	West	Street-facing	1000
Wild Wings	Harbour Point	West	Street-facing	1500
Boxcar Social	Harbourfront Centre	West	Street-facing	3500
Friends Fries	Harbourfront Centre	West	Concession	2000
Good Behaviour Ice Cream	Harbourfront Centre	West	Concession	1000
Lisa's Ice Cream	Harbourfront Centre	West	Concession	200
The Slip	Harbourfront Centre	West	Concession	2000
Cosmopawlitian	King's Landing	West	Street-facing	1500
Edible Arrangements	King's Landing	West	Street-facing	1000
Harbourfront Eye Care	King's Landing	West	Street-facing	1500
Music Garden Cafe	King's Landing	West	Street-facing	1000
Omnya Health	King's Landing	West	Street-facing	1500
Queen's Quay Dental Centre	King's Landing	West	Street-facing	2000
Selfie Nails	King's Landing	West	Street-facing	1200
Solace Tanning	King's Landing	West	Street-facing	1200
The National Ballet of Canada	King's Landing	West	Street-facing	4000
Guirei Toronto	Queen's Harbour	West	Street-facing	3000
Cabin: Barber and Gentlemen Supply	Queen's Quay Terminal	West	Internal	2000
Expedia Group, Inc	Queen's Quay Terminal	West	Internal	500
Farm Boy	Queen's Quay Terminal	West	Internal	8000
Goodman Pub & Kitchen	Queen's Quay Terminal	West	Internal	5000
Joe Bird	Queen's Quay Terminal	West	Street-facing	3000
Northam Realty - Queens Quay Terminal	Queen's Quay Terminal	West	Internal office	1000
Pearl Chinese Cuisine	Queen's Quay Terminal	West	Internal	6500
Pie Bar	Queen's Quay Terminal	West	Internal	2000
Tim Hortons	Queen's Quay Terminal	West	Internal	1200
Cafe Locale	Radisson	West	Street-facing	1200
Canada MedLaser	Radisson	West	Street-facing	2000
City Seeing Toronto	Radisson	West	Street-facing office	1500
City Tour	Radisson	West	Street-facing office	1500
Cruise Toronto Inc.	Radisson	West	Street-facing office	1500
Radical Wheelz	Radisson	West	Street-facing	1200
Shoeless Joe's	Radisson	West	Street-facing	3200
The Nautical Mind	Radisson	West	Street-facing	1500
Tim Hortons	Radisson	West	Street-facing	2500
Wheel Excitement Inc	Radisson	West	Street-facing	2800
Yankee Lady	Radisson	West	Street-facing office	1500
Harbourfront Dental	Spadina Quay Office Complex	West	Internal	1000
Kardia Athletica	Spadina Quay Office Complex	West	Street-facing	2000
Starbucks	Spadina Quay Office Complex	West	Street-facing	3000
Subway	Spadina Quay Office Complex	West	Street-facing	1500
Tim Hortons	Ten York	West	Street-facing	1000
Harbour Green Farms	The Atrium on Queens Quay	West	Street-facing	2500

Dream Cyclery	The Quay	West	Street-facing	1500
Harbourfront Animal Hospital	The Quay	West	Street-facing	1000
Queens Quay Convenience	The Quay	West	Street-facing	1000
Sculpture Nail & Spa	The Quay	West	Street-facing	1000
Shoppers Drug Mart	The Quay	West	Street-facing	7600
The Beer Store	The Quay	West	Street-facing	3900
Couture Vision	The Riviera	West	Street-facing	500
Golden Hanger Cleaners	The Riviera	West	Street-facing	1200
Penguin Pick Up	The Riviera	West	Street-facing	1000
Subway	The Riviera	West	Street-facing	1200
The Wine Shop	The Riviera	West	Street-facing	1500
Vape Store	The Riviera	West	Street-facing	1000
Freshii	Waterclub	West	Street-facing	500
Harbourfront Appletree	Waterclub	West	Street-facing	3000
Harbourfront Medicine Cabinet	Waterclub	West	Street-facing	1500
INS Market	Waterclub	West	Street-facing	500
Pizza Pizza	Waterclub	West	Street-facing	2200
Popeyes	Waterclub	West	Street-facing	2500
Queen's Quay Hair Design	Waterclub	West	Street-facing	500
Shatter Abbas	Waterclub	West	Street-facing	1500
Starbucks	Waterclub	West	Street-facing	1200
Waterview Dental	Waterclub	West	Street-facing	2750
Wings & Bites	Waterclub	West	Street-facing	500

Source: Inventory and Estimation done by John Archer & Associates + hRz Research Insights - July 2023

APPENDIX 4: TRADE AREA PRE-CONSTRUCTION

Retail Development: 400m and 800m Trade Area

Area	Status	Retail GFA Sqft.
400m Trade Area	Recently Completed	125938
	Under Construction	90783
	Pre Construction	-
	400m Recently Completed + Under Construction + Pre-Construction Total	216,721
800m Trade Area	Recently Completed	53962
	Under Construction	569239
	Pre-Construction	733836
	800m Recently Completed + Under Construction + Pre-Construction Total	1,357,037
400m Trade Area + 800M Trade Area Total		1,573,758

Source: Inventory and Estimation done by John Archer & Associates + hRz Research Insights - July 2023

APPENDIX 5: WATERFRONT ATTRACTIONS

- Waters Edge Walking
- Boat Experiences
 - Tour
 - Charter
 - Entertainment
 - Paddle / Active
 - Boat Rental
- Martin Goodman Trail
- Waterfront Parks
 - Urban Beaches (Sugar Beach, HTO Park)
 - Signature Parks (Love Park)
 - Landscaped Parks (Toronto Music Garden)
 - Toronto Islands
 - Terry Fox Park
 - Sherborne Common Skate Rink
- Toronto Islands
 - Beaches
 - Island Neighborhoods
 - Restaurants
 - Maze
 - Franklin's Children's Garden
 - Centerville
 - Paddling
 - Bike rentals
 - Nude Beach
- Paid Family Destinations
 - Lighthouse Immersive
 - Second City
 - Toronto Railway Museum (adjacent)
 - Ripley's Aquarium (adjacent)
 - Hockey Hall of Fame (adjacent)
 - Saint Lawrence Market (adjacent)
 - Distillery District (adjacent)
 - Centerville Amusement Park
 - CN Tower (adjacent)
- Cultural Programming
 - Power Plant Gallery
 - Harbourfront Centre
 - Fleck Dance Theatre
 - The Bentway (adjacent)
 - Exhibition Place (adjacent)
- Destination Restaurants
 - Don Alfonzo
 - Harbour 60
 - Butcher Chef
 - Amsterdam Brew House
 - Waters-edge patios.
 - Miku
- Sports / Major event venues
 - Scotiabank Arena (adjacent)
 - Rogers Centre (adjacent)
 - BMO Field (adjacent)
- Conference / Hotel
 - Radisson Blu
 - Westin Harbour Castle Hotel.
 - Westin Conference Centre
 - Metro Toronto Convention Centre (adjacent)
 - Delta Hotel (adjacent)
 - Royal York Hotel (adjacent)
- Transportation Hubs
 - Union Station
 - Union Station Go Bus Terminal
- Heritage Attractions
 - Toronto Island Lighthouse
 - Canadian Malting Silos
- Future Attractions
 - Bathurst Quay Common - Programable Park
 - Spadina Pier - Programmable Park
 - Corleck Building
- Art
 - Between the Eyes
 - Sundial Folly
 - Learn to throw your voice
 - Capitan Johns anchor
 - Terry Fox Monument
 - Love Park Animal Sculptures
 - Airport Arts Programming
 - Jack Layton Monument

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VERSION SUMMARY

- Early drafts were shared with key stakeholders, marked without "F-Final", in January-March 2024.

Version 1F - April 2024