City of Hamilton
WEST HARBOUR DEVELOPMENT
SUB-COMMITTEE REVISED

Meeting #: 19-002
Date: September 9, 2019
Time: 1:00 p.m.
Location: Room 264, 2nd Floor, City Hall
71 Main Street West

Tamara Bates, Legislative Coordinator (905) 546-2424 ext. 4102

1. CEREMONIAL ACTIVITIES

2. APPROVAL OF AGENDA
(Added Items, if applicable, will be noted with *)

3. DECLARATIONS OF INTEREST

4. APPROVAL OF MINUTES OF PREVIOUS MEETING
4.1 February 26, 2019

5. COMMUNICATIONS

6. DELEGATION REQUESTS

7. CONSENT ITEMS

8. PUBLIC HEARINGS / DELEGATIONS

9. STAFF PRESENTATIONS
9.1 Status of West Harbour Implementation (PW17075(c))

*9.1.a Presentation
10. **DISCUSSION ITEMS**

10.1 Piers 6 and 7 Commercial Village Activation Plan (PED19191)

Note: Due to bulk, Appendices A and B to PED19191, Piers 6 and 7 Commercial Village Activation Plan will not be printed, but will be available online.

10.2 For the Consideration of the West Harbour Development Sub-Committee: 0.13% Increase for Capital Financing of West Harbour Development

11. **MOTIONS**

12. **NOTICES OF MOTION**

13. **GENERAL INFORMATION / OTHER BUSINESS**

13.1 Amendments to the Outstanding Business List

13.1.a Items Considered Completed and to be Removed

13.1.a.a Pier 7 Parcels of Land

Item on OBL: B
Addressed as Item 10.1 on today's agenda.

13.1.a.b Status of West Harbour Implementation (PW17075(a))

Item on OBL: C
Addressed as Item 10.1 on today's agenda.

*13.2 Werner Plessel, Executive Director, Waterfront Trust, Update on Capital Projects (no copy)

14. **PRIVATE AND CONFIDENTIAL**

15. **ADJOURNMENT**
West Harbour Development Sub-Committee
Minutes 19-001
2:00 p.m.
Tuesday, February 26, 2019
Council Chambers, City Hall
71 Main Street West
Hamilton, Ontario

Present: Mayor F. Eisenberger, Councillors J. Farr (Chair), M. Wilson (Vice-Chair), C. Collins, and J.P. Danko

THE FOLLOWING ITEMS WERE REFERRED TO THE GENERAL ISSUES COMMITTEE FOR CONSIDERATION:

1. Appointment of Chair and Vice-Chair (Item 1)

   (Collins/Eisenberger)
   (a) That Councillor Farr be appointed as Chair of the West Harbour Development Sub-Committee for the 2018 – 2022 term; and,

   (b) That Councillor Wilson be appointed as Vice-Chair of the West Harbour Development Sub-Committee for the 2018 – 2022 term.

   CARRIED

2. West Harbour Re-Development Plan Implementation – Status Update (PED17181(a)) (Ward 2) (Item 10.1)

   (Danko/Collins)
   That Report PED17181(a), respecting the West Harbour Re-Development Plan Implementation – Status Update, be received.

   CARRIED

3. Status of West Harbour Implementation (PW17075(b)) (City Wide) (Item 10.2)

   (Eisenberger/Collins)
   That Report PW17075(b), respecting the Status of West Harbour Implementation, be received.

   CARRIED
4. Macassa Bay Year-Round Liveaboard Association 2018/2019 Transition Plan (PED18222(b)) (Ward 2) (Item 10.3)

(Eisenberger/Collins)
(a) That Council authorize the General Manager of the Planning and Economic Development Department to execute, on behalf of the City of Hamilton, an agreement with the Macassa Bay Yacht Club (MBYC) whereby the Macassa Bay Yacht Club (MBYC) permits the mooring of up to 15 boats owned by members of the Macassa Bay Year-Round Liveaboard Association (LAA) to reside at the Macassa Bay Yacht Club (MBYC) for the 2018/19 winter season in a form satisfactory to the City Solicitor; and,

(b) That Council authorize the General Manager of the Planning and Economic Development Department to execute, on behalf of the City of Hamilton, an agreement with each member of the Macassa Bay Year-Round Liveaboard Association (each a “Liveaboard”) who resides at the Macassa Bay Yacht Club (MBYC) with the Macassa Bay Yacht Club’s (MBYC’s) consent for the 2018/2019 winter season in a form satisfactory to the City Solicitor.

CARRIED

FOR INFORMATION:

Mayor Eisenberger assumed the Chair.

(a) CHANGES TO THE AGENDA (Item 2)

The Committee Clerk advised there were no changes to the Agenda.

(Collins/Danko)
That the Agenda for the February 26, 2019 meeting of the West Harbour Development Sub-Committee be approved, as presented.

CARRIED

(b) DECLARATIONS OF INTEREST (Item 3)

There were no declarations of interest.

(c) APPROVAL OF MINUTES (Item 4)

(i) April 10, 2018 (Item 4.1)

(Collins/Eisenberger)
That the Minutes for the April 10, 2018 meeting of the West Harbour Development Sub-Committee be approved, as presented.

CARRIED
Councillor Farr assumed the Chair.

(d) ADJOURNMENT (Item 15)

(Danko/Wilson)
That, there being no further business, the West Harbour Development Sub-Committee be adjourned at 3:08 p.m.

CARRIED

Respectfully submitted,

Councillor Farr, Chair
West Harbour Development
Sub-Committee

Angela McRae
Legislative Coordinator
Office of the City Clerk
COUNCIL DIRECTION

Not Applicable.

INFORMATION

OVERVIEW

The purpose of this report is to provide Council an update to report PW17075(b) "Status of West Harbour Implementation", submitted to West Harbour Development Sub-Committee on February 19, 2019.

PIER 8 PROJECTS

Since February 2019, staff has been engaged in finalizing tender documents and construction of four major infrastructure projects required to support development on Pier 8:

1. Pier 8 Shorewall Rehabilitation (awarded and under construction);
2. Pier 8 Sanitary Pumping Station (awarded and under construction);
3. Pier 8 Servicing (awarded and under construction); and
4. Copp's Pier (formerly Promenade Park – in tender period)
PIER 8 PROJECTS SCHEDULE AND OVERALL TIMING

As reported in PW17075(b), the original construction schedules for the Pier 8 projects anticipated that each would be under construction in 2018; however, for several reasons schedules for these projects have shifted because of unanticipated events in 2018 that strained available resources:

- Floating breakwater failure (caused by April 2018 storm)
- MacDonald Marina site clearing and Liveaboard Boaters Transition Plan
- Project design complexity and cost inflation

Record high water levels in 2019 have further exacerbated the schedule requiring construction of the shorewall to stop in May which in turn affected the start date of the pumping station. The delay in shorewall completion also affects the start of Copp’s Pier as it cannot start until the shorewall is, for the most part, complete.

The current schedule for all Pier 8 projects is:

a) Pier 8 Shorewall Rehabilitation [complete by end of Q4 2019]
b) Pier 8 Servicing (water, sewers, utilities, roads) [complete by mid Q2 2020]
c) Pier 8 Sanitary Pumping Station [complete by end of Q3 2020]
d) Copp’s Pier [start Q4 2019; complete by end of Q3 2020]
e) Gateway Park [follows servicing - start Q2 2020; complete by end of Q3 2020]

Note: timelines are estimates; project start dates assume a typical tendering/procurement process and project duration is based on historical experience and input from industry experts. Waterfront projects to date have been affected by weather and water level related issues.

Although there has been slippage in the schedule in 2019, delays in project delivery are still not expected to delay the overall Pier 8 redevelopment plan as the primary driver for project delivery is to meet time lines of the concurrent land disposition process Planning and Economic Development staff are leading. Major components of the Land Disposition Process include: Council approval of the Development Agreement with the Council approved Preferred Proponent for the Pier 8 Development Opportunity (Waterfront Shores Corporation), Zoning approval to be obtained from the Local Planning Appeal Tribunal (LPAT) with hearing dates set for October 2019, and the developer ultimately obtaining Site Plan approval from the City which could occur as early as 2020.

Based on this timeline staff anticipates that Pier 8, even with the recent delays caused by high lake levels, will be development-ready (fully serviced) in time for the developer to apply for building permits in 2020/21.
COPP’S PIER (FORMERLY PIER 8 PROMENADE PARK)
Staff postponed the tendering of the project this past spring subject to approval of legislation within Bill 66 which deemed municipalities, school boards, hospitals and other public bodies "non-construction employers". For the City, this means removing the requirement that the general contractor on the Copp’s Pier project be signatory to the United Brotherhood of Carpenters and Joiners of America and could equate to significant savings. In addition, tendering was postponed because of the potential effect high water levels could have on the cost of the project and the construction schedule.

The project is in the tendering period now and subject to acceptable bids and available capital funds, the project will start upon completion of the shorewall rehabilitation.

PIERS 5-7 REDEVELOPMENT
In conjunction with Pier 8, work has continued with implementing the West Harbour Recreation Master Plan (WHRMP) on Piers 5-7 in partnership with the Hamilton Waterfront Trust (HWT), including the planned relocation of the Police Marine Unit to Macassa Bay from Pier 7. The redevelopment project is comprised of five major components:

1. Shorewall rehabilitation (Phase 1 construction)
2. New boardwalk and fish habitat (Phase 1 construction)
3. Waterfront trail / public spaces / pedestrian bridges (Phase 2 construction)
4. Public Art installation at the foot of James (Phase 2 construction)
5. Multi-purpose public buildings (Artisan Village) (Phase 3 construction)

PHASE 1 CONSTRUCTION
Originally planned to start in fall 2018, a revised schedule for construction received from the HWT, shows Phase 1 construction including shoreline reconstruction and boardwalk construction with fish habitat (Items 1 and 2 above) starting in 2019 and completed in May 2020; however, a cost estimate received for Phase 1 construction has identified a $11.5M shortfall. HWT has been requested to consider options, including design changes, to reduce the shortfall; however, it is unlikely that design changes alone will eliminate the shortfall, thus the projects require increased funding.

Options to consider for addressing the budget shortfall for the Piers 5-7 projects include:

- design changes to lower the cost;
- increasing the capital budget;

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• deferring other West Harbour projects to allow funding to be directed to Piers 5-7; or
• any combination of the three.

Design changes to reduce the shortfall could mean eliminating certain elements in a design; e.g. a shade structure or seating area, or could mean changing materials to something more affordable; e.g. galvanized steel in place of stainless steel; however, changes with a greater cost impact will be required if significant reductions are to be found. For example, significant savings could be found by making minor adjustments to the shoreline and boardwalk configuration.

The shortfall could also be addressed through the Capital Budget by either approving new funding in 2020 to close the gap and/or deferring other planned West Harbour projects.

Following Piers 5-7, the West Harbour Implementation Plan includes several projects from the approved WHWRMP that are planned to enhance existing public amenity space along the shoreline. These include:

• Bayfront Park (Total Capital Budget $7.8M)
  • Phase 1 – Children’s Play Area ($500K)
  • Phase 2 – Upgraded / new washrooms, play areas, shelter, concessions, bistro, canoe storage, walkways, picnic pavilion ($6.5M)
  • Phase 3 – Entrance Fountain ($540K)
  • Public Art ($260K)

• Macassa Bay (Total Capital Budget $12.7M)
  • Shoreline Rehabilitation ($5.4M)
  • Waterfront Trail & Boardwalk ($7.1M)
  • Public Art ($160K)

• Pier 4 Park (Total Capital Budget $1.4M)
  • Gartshore Building, Trail & Pathway Upgrades ($1.3M)
  • Public Art ($120K)

• Bayview Park (Total Capital Budget $2.8M)
  • Remediation and Redevelopment ($2.5M)
  • Public Art (360K)
Generally, any one of the above projects could be altered and/or deferred so that funding could be made available to complete the Piers 5-7 projects. For example, plans / funding for Bayfront Park could be adjusted as some aspects of the plan for the park is linked to, and predicated, on the re-opening of Bayfront Beach. As reported in PW19057, the beach is currently closed by order of Public Health Services due to water quality problems and it is unlikely it will improve over the short to medium term.

Similarly, plans for Bayview Park remediation and redevelopment could be reassessed since this project was predicated on the proposed location of a future public parking garage being constructed on the site. Through the West Harbour Parking Strategy it was determined that the Bayview site is not large enough to accommodate the future parking supply requirements so this site has been removed from future consideration.

Depending on the priorities of Council, staff could examine various options similar to the examples above and report back with recommendations.

PHASE 2 CONSTRUCTION
The second phase of construction includes a new waterfront trail, plaza areas to support the future waterfront commercial village, pedestrian bridges along the boardwalk, and a public art gateway feature at the foot of James. The design is nearing completion; however, the City has not received detailed cost estimates for these components at this time so it is unclear if the budget allocated for the work is adequate. If cost escalation becomes an issue for this phase, options similar to those discussed for Phase 1 should be considered.

The three pedestrian bridges along the boardwalk are still subject to a future capital budget approval. Functional design level cost estimates for the three bridges total $4M (2018 dollars) with funding requirements identified in the capital budget forecast in 2020 and 2021. If cost escalation for these bridges becomes an issue, staff will report back to Council with recommends on how to proceed.

The public art installation, to be installed at the foot of James is being implemented in accordance with the City of Hamilton’s Public Art Master Plan process detailed in the Public Art Call for Artists Policy. It is being implemented at a fixed cost so this component of the project should not be subject to cost escalation.

PHASE 3 CONSTRUCTION
This phase of construction is to implement the planned Artisan Village at Pier 6. It was earlier reported (PW17075b) that the original plan to re-purpose two Port Authority buildings into multi-purpose public buildings is not feasible both because of building and fire code requirements and that they need removing in order to
complete the shorewall and boardwalk construction. In that respect, the funding allocation in the plan is deficient if they need to be replaced with two new buildings. To resolve the issue, staff and the HWT will review possible changes to the Artisan Village plan at this location which could include eliminating one of the proposed buildings and combining the available financial resources into one facility. In the interim, staff has identified an additional $3M in the West Harbour capital budget forecast for 2021; however, until a feasibility study is completed it is unclear whether the additional funding is adequate.

POLICE MARINE UNIT
The Police Marine Unit on Pier 7 is to be relocated to Macassa Bay to a newly constructed permanent facility in accordance with the West Harbour Waterfront Recreation Master Plan. Subject to a feasibility study, the new permanent facility is scheduled for as early as 2022. The Piers 5-7 redevelopment schedule has necessitated the need to move the existing Police Unit at Pier 7 into a temporary facility at the former MacDonald Marine site. The temporary facility is now complete and the Police have officially transferred to Macassa Bay.

CAPITAL BUDGET STATUS
Since 2014 the Waterfront Development Office has proceeded on the basis of staying within the overall program budget recognizing that some projects would invariably be delivered at less cost than estimated and that others may be more costly. Until 2019 the program has proceeded without the benefit of capital cost indexing. Moreover, the original costing established for the program between 2010 and 2012 was at a coarse master plan level and did not fully consider some of the site-specific issues and requirements that are being dealt with at the waterfront such as de-watering, soil contamination, stormwater management, and streetscaping, as examples. Given the complexity of the work, lack of well-defined scope (atypical municipal infrastructure such as shorewall rehabilitation), and the need to deliver in such a short time period, staff’s approach was to work with the original program budget allocation. Recognizing a shortfall could be driven by inflation, lack of scope and/or unanticipated work, staff was reluctant to unnecessarily increase a capital budget until it was clear if a cost escalation was expected. Notwithstanding, to reduce the impacts of inflation, in 2018 as part of the DC By-Law update all projects not underway were indexed to 2019 and were updated in the Capital Budget Forecast.

To date the 2013-19 West Harbour Initiatives Capital Budget totals approximately $96 million across 32 projects. An additional approximately $70M is required to finish the plan forecast in years 2020 to 2024+, over half of which is tied to the delivery of a new parking garage needed to support planned growth in visitors and to replace parking lost as part of the waterfront redevelopment and a new police station at Macassa Bay.
PRIORITY CAPITAL WORKS – PIER 8 AND PIERS 5-7

- Pier 8:
  In September 2018 staff alerted Council (PW18079) to the potential cost increase for capital works on Pier 8 and recommended the need to proceed with tenders for one hundred percent of the work required for the four major projects with any additional funding required to be referred to the 2019 Capital Budget process. Three of the four major projects on pier 8 are under construction; the fourth (Copp’s Pier Park) was postponed because of high water levels, but is now being tendered.

Overall the cost for Pier 8 capital works is expected to be approximately 5% higher than original bases estimates net of unanticipated scope. On Pier 8, examples of unanticipated scope include costs related to streetscaping and a public walkway identified during the Pier 8 Urban Design Study.

<table>
<thead>
<tr>
<th>Pier 8 Projects</th>
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<tbody>
<tr>
<td>Development-Ready</td>
<td>$20.4M</td>
<td>$27.2M</td>
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<td>$48.3M</td>
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- Piers 5-7:
  Presently, the HWT is finalizing the phase 1 detail design of the Piers 5-7 projects and subject to approval of the plans and cost estimates, anticipates starting the project in the fall; however, as noted previously, Phase 1 works are approximately $11.5M underfunded.
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Based on estimates received, the total cost for Pier 5-7 capital works is expected to be approximately 37% higher than the original bases estimates net of unanticipated work; however, cost estimates have not been developed for Phase 2 or Phase 3 work. Cost implications of this project will be refined further once certified cost estimates are submitted.

**APPENDICES AND SCHEDULES ATTACHED**

None
Status of West Harbour Implementation

SEPTEMBER 9, 2019
Status of West Harbour Implementation

Major Projects – Status Complete

• Pier 4 and 8 Shoreline Rehabilitation
• Pier 7 Shoreline and Transient Docks
• Marina
  • Floating Breakwater
  • Dock Replacement
  • Police Unit Relocation
• Pier 8 Site Preparation
  • Building Demolition
  • Sun-Canadian Pipeline Relocation
Status of West Harbour Implementation

Major Projects – Pier 8

• **Under Construction**
  - Pier 8 Shorewall Rehabilitation
  - Pier 8 Sanitary Pumping Station
  - Pier 8 Servicing (road, sewers, watermain)

• **In Tender Period**
  - Copp’s Pier (formerly Promenade Park)
Status of West Harbour Implementation

Pier 8 Construction Schedule

Current schedule for all Pier 8 projects is:

- **Shorewall Rehabilitation**
  [complete by end of Q4 2019]

- **Servicing (water/sewers/utilities/roads)**
  [complete by mid Q2 2020]

- **Pumping Station**
  [complete by end of Q3 2020]

- **Copp’s Pier**
  [start Q4 2019; complete by end of Q3 2020]

- **Gateway Park**
  [follows servicing; complete by end of Q3 2020]
Status of West Harbour Implementation

Major Projects – Piers 5-7 Public Realm

Currently finalizing design for Phase 1 and 2:

Phase 1 Construction (potential fall 2019 start)
- Shorewall rehabilitation
- New boardwalk and fish habitat

Phase 2 Construction (potential mid 2020 start)
- Waterfront trail / public spaces / pedestrian bridges
- Public Art installation at the foot of James

Phase 3 Construction (potential mid 2020 start)
- Multi-purpose public buildings (Artisan Village)
Status of West Harbour Implementation

Capital Budget Status

2013-19 Capital Budget:
- approximately $96 million approved across 32 projects

2020-2024+ Capital Budget:
- approximately $70M required to finish the plan
Status of West Harbour Implementation

Priority Capital Works - Pier 8

Cost for Pier 8 capital works is expected to be approximately 5% higher than original bases estimates net of unanticipated scope.

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Status of West Harbour Implementation

Priority Capital Works – Piers 5-7

Phase 1 Construction
(new shoreline, boardwalk and fish habitat)

- Phase 1 construction has identified a $11.5M shortfall.

- City has requested that options be considered to address shortfall, including design changes.

- It is unlikely that design changes alone will eliminate the shortfall.
Status of West Harbour Implementation

Priority Capital Works – Piers 5-7

Options to reduce Phase 1 budget shortfall:

- Design changes to lower the cost;
- Increasing the capital budget;
- Deferring other West Harbour projects to allow funding to be directed to Piers 5-7; or
- Any combination of the three above.
Status of West Harbour Implementation

Priority Capital Works – Piers 5-7

Phases 2 and 3 Construction

(new waterfront trail, plaza areas, gateway feature, pedestrian bridges and Artisan Village):

- cost estimates being prepared
- unclear if the budget allocated for the work is adequate
- options similar to those discussed for Phase 1 should be considered if costs escalate
Status of West Harbour Implementation

Priority Capital Works – Piers 5-7

Although still in the design stage, costs for Piers 5-7 capital works is currently expected to be ~37% higher than original bases estimates net of unanticipated scope.

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Questions/Comments
Piers 5-7 Functional Plan
Harbour West Concept Plan (January 2010)
TO: Chair and Members  
West Harbour Development Sub-Committee

COMMITTEE DATE: September 9, 2019

SUBJECT/REPORT NO: Pier 6 and 7 Commercial Village Activation Plan (PED19191) (Ward 2)

WARD(S) AFFECTED: Ward 2

PREPARED BY: Chris Phillips 905-546-2424 Ext. 5304

SUBMITTED BY: Jason Thorne  
General Manager  
Planning and Economic Development Department

SIGNATURE: 

RECOMMENDATION

(a) That staff be directed to prepare and execute a procurement process to select an external entity for the purposes of building, operating, and programming temporary commercial and public uses within the Pier 6 and 7 lands and potentially adjacent city-owned lands as an interim use;

(b) That the procurement process includes a short-term land lease of not more than three years with renewal options at the City’s discretion, at nominal value for the development blocks within these lands;

(c) That staff be authorized and directed to prepare the formal procurement process in a manner and on terms and conditions deemed appropriate by the General Manager of the Planning and Economic Development Department, and in a form acceptable to the City Solicitor;

(d) That the retail study attached as Appendix “A”, be received;

EXECUTIVE SUMMARY

On May 9, 2018, Council approved General Issues Committee (GIC) Report 18-010, which included the following motion from the West Harbour Development Sub-Committee Minutes 18-001:

OUR Vision: To be the best place to raise a child and age successfully.
OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.
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“That staff be directed to prepare a property disposition strategy for the residential and commercial blocks at Piers 5-7 with options and alternatives that outline the process, timelines and anticipated resources associated with their sale.”

Subsequently, on February 26, 2019, the West Harbour Development Sub-Committee received Report PED17181(a) entitled “Staff West Harbour Re-Development Plan Implementation (WHRD) - Status Update”, which provided the Sub-Committee an update on the non-Capital works projects and committed to reporting back to the Sub-Committee with the results of the on-going studies and disposition options for the identified private sector development blocks.

The Council approved West Harbour Waterfront Recreation Master Plan (WHWRMP), envisions the transformation of the Pier 6 and 7 lands with significant investments in infrastructure and public space, with the potential of creating a new destination for the City. A newly rehabilitated shoreline, a publicly accessible boardwalk along the water’s edge, a continuation of the existing waterfront trail, and a pedestrianized open space complemented by an adjacent commercial village development, are all features that are prominent within the plan.

The site is only part of a larger initiative to establish the West Harbour waterfront as a destination for those who live within the area and for the broader community. Identified as a potential area for private sector investment, the WHWRMP envisioned four new development blocks to be created within the Pier 6 and 7 lands, along with the rehabilitation and/or replacement of the existing buildings that currently occupy the site.

As part of the design and construction process, staff from the Waterfront Development Office (WDO) and the Hamilton Waterfront Trust (HWT) has identified more precisely the proposed location of the future development blocks.

West Harbour staff has undertaken an initial high-level review to determine the marketability, curation, valuation, and phasing plan for the proposed private sector development. This analysis included a review of past reports prepared by Deloitte, a review of the critical path for all outstanding work within the Piers 6 to 8 area, an internal financial assessment performed by City staff, and professional advice prepared by external consultants in the form of:

1. Retail and commercial uses study
   Staff retained the firm Beauleigh, a Toronto-based retail consulting and brokerage firm, to conduct a Retail Analysis for the entire West Harbour area, but with specific attention to the proposed commercial village concept in the Piers 6 and 7 lands, which is included as Appendix “A” to Report PED19191; and,
2. Public-space animation and place-making study

Staff engaged the organization Project for Public Spaces (PPS) to lead a collaborative process to consult with the community and stakeholders on how institutional and commercial uses, both proposed and existing, can work to support the vibrant new public spaces.

At this stage, staff believes it is premature for the City to engage in a process to determine the long-term disposition of the Piers 6 and 7 development blocks, specifically in the form of a land sale and/or long-term land lease. This is based on:

   i. the on-going construction schedule of the Piers 6 and 7 lands;
   ii. the uncertainty of the long-term parking for the Piers 6 and 7 development blocks;
   iii. the uncertainty of the existing market demand for retail in the short-term;
   iv. the uncertainty of land value for the development blocks;
   v. the potential to build value in the land through the continued public and private development in Piers 5 to 8; and,
   vi. the importance of immediate placemaking activities.

The recommended approach would be to offer a short-term land lease (up to three years with renewal options) to an external entity, for the purposes of building, operating, and programming temporary commercial and public-uses, within the Pier 6 and 7 lands. The recommendation seeks approval to offer this land-lease at a nominal value with all upfront capital and on-going operational costs to be borne by the approved external entity. Staff would also ensure that the terms of reference clearly identify the types of uses that would be acceptable to the City including the commercial, recreational, and public uses, as well as key deliverables including specified programming hours and objectives. This would be informed by the public consultation process undertaken by PPS. Appendix “B” to Report PED19191 provides some examples of precedents that illustrate placemaking in other communities.

Through the process of conducting both the retail and placemaking studies, staff identified external entities that not only would be willing to invest in Piers 6 and 7 but would prefer a temporary location at the waterfront. The unpredictability of construction schedules, the lack of existing amenities in the area, and the phased plan for the Pier 8 residential development, are all factors that favour investments in short-term temporary facilities as opposed to permanent bricks-and-mortar development at this time.

Further, there is a limited financial business case to be made at present for the development blocks on Piers 6 and 7, based on any traditional metrics of the development industry for commercial/retail properties. This is mainly due to factors such as the limited floor space available within the existing planning regime, the upfront cost of construction, the lack of existing residential density at the site, and the limited
existing amenities. Staff has not completed a real estate financial appraisal of the individual Pier 6 and 7 development blocks. However, the internal assessment would be that the development blocks, at the present time, have a limited financial land-value, based on the factors identified above.

The expectation is that as the public-space amenities are constructed, become activated, and the area is enhanced by greater residential density on Pier 8, the value of the Pier 6 and 7 development blocks will increase and the marketability of the commercial and retail uses increases as well.

Alternatives for Consideration – See Page 11

FINANCIAL – STAFFING – LEGAL IMPLICATIONS

Financial:
There are no specific financial implications for the recommendations contained in Report PED19191. The recommendation would lead to a nominal value lease for up to three years with renewal options, and all costs to be borne by external entities.

Staffing:
It is anticipated that the recommendations will be implemented by existing West Harbour staff within the Planning and Economic Development Department and Procurement.

Legal:
Legal Services will support the Council directions arising from this Report.

HISTORICAL BACKGROUND

On May 9, 2018, Council approved GIC Report 18-010, which included the following motion from the West Harbour Development Sub-Committee Minutes 18-001:

“That staff be directed to prepare a property disposition strategy for the residential and commercial blocks at Piers 5 - 7 with options and alternatives that outline the process, timelines and anticipated resources associated with their sale.”

Subsequently, on February 26, 2019, the West Harbour Development Sub-Committee received Report PED17181(a) entitled “Staff West Harbour Re-Development Plan Implementation (WHRDP) - Status Update”, which provided the Sub-Committee an update on the non-Capital works projects and committed to reporting back to the Sub-Committee with the results of the on-going studies and disposition options for the identified private-sector development blocks.
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POLICY IMPLICATIONS AND LEGISLATED REQUIREMENTS
N/A

RELEVANT CONSULTATION
N/A

ANALYSIS AND RATIONALE FOR RECOMMENDATION

On October 11, 2016, the WHD Sub Committee received Appendix “A” to Report PED16215 - City of Hamilton West Harbour Strategic Properties Real Estate Development and Disposition Opportunities – Final Report. Acting on behalf of the City, Deloitte was retained to develop a real estate and disposition plan for the City, which included an analysis of several City-owned properties within the West Harbour area.

As part of this study dated April 2016, Deloitte suggested that the City should consider the retention of the Pier 6 and 7 sites, with the long-term vision of focusing public amenities on this site to help draw residents and visitors to the waterfront area. At that time, the basis of this conclusion was predicated on their financial analysis that showed the site having a limited financial feasibility for the proposed commercial and retail uses, as well as a limited land valuation for the City.

During the preparation of this Report, West Harbour staff has undertaken an initial high-level review to determine the marketability, curation, valuation, and phasing plan for the proposed private sector development. This analysis included a review of past reports prepared by Deloitte, a review of the critical path for all outstanding work within the Piers 6 to 8 area, an internal financial assessment performed by City staff, and professional advice prepared by external consultants.

At this stage, staff believes it is premature for the City to engage in a process to determine the long-term disposition of the Piers 6 and 7 development blocks, specifically in the form of a land sale and/or long-term land lease.

Uncertainty of Planning Approvals:
At the time of writing this Report, there remains uncertainty as to the approved land uses for the development blocks on the Piers 6 and 7 lands, primarily due to two outstanding appeals before the Local Planning Appeal Tribunal (LPAT) of the planning instruments for the Piers 6 and 7 lands (OPA 233 and By-law 14-042). The appellants are local citizens, Dave Stephens and Bryan Ritskes, both represented by Herman Turkstra, and there are no hearing dates scheduled for these appeals.
OPA 233 and By-law 14-042 were approved to fully implement the overall intent of the Council approved WHWRMP, by specifically revising some of the land uses within the Pier 6 and 7 lands for the proposed commercial village. Therefore, the commercial village as envisioned cannot be fully implemented until such time as the LPAT process is completed.

Site Servicing and Construction Schedule:
As part of the broader WHRDP, City Council has approved approximately $100 million in capital investment since 2012 for asset and infrastructure rehabilitation, the construction of new parks and public space on Piers 5 to 8, as well as the construction of new and adequate municipal servicing infrastructure. Specific to the Pier 6 and 7 lands, in partnership with the Hamilton Waterfront Trust (HWT), the implementation of the WHWRMP projects are comprised of five major components:

1. Shorewall rehabilitation (Phase 1 construction)
2. New boardwalk and fish habitat (Phase 1 construction)
3. Waterfront trail / public spaces / bridges (Phase 2 construction)
4. Public Art installation at the foot of James (Phase 2 construction)
5. Multi-purpose public buildings (Artisan Village) (Phase 3 construction)

The municipal servicing of the Piers 6 and 7 lands will be completed as part of the Pier 8 servicing contract which is slated for completion by Q.3 2020. Phase 1 construction of the Pier 6 and 7 lands including shoreline reconstruction and boardwalk construction with fish habitat (Items 1 and 2 above) are planned to start in the latter part of 2019 with completion planned for May 2020, with Phase 2 construction completion planned by Q.3 2021.

Therefore, the Piers 6 and 7 lands will be constrained by construction throughout the 2019 - 2021 periods. Although adequate municipal services will be in place by the end of 2020 and the construction of the development block by a private sector firm could be coordinated with the planned construction schedule above, this would add to the complexity of the site, especially during the recreational boating season of May to September.

Long-Term Parking for Pier 6 and 7 Commercial Village & Marina:
As part of the WHRDP, existing public parking located on Piers 6 to 8, as well as the existing parking for the marina facilities, will be eliminated over time as development progresses. West Harbour staff have identified a long-term need to replace approximately 500 to 600 parking spaces over the life of the Piers 6 to 8 developments.
Although the WHWRMP identified the future need for a parking structure to address this concern, both the specific site and the funding options for this have not been finalized.

On February 26, 2019, the WHD Sub Committee received Report PW17075(b) entitled “Status of West Harbour Implementation”, which highlighted the status of the Parking Garage Location Study. A Request for Proposal (RFP) is intended to be released in 2019 and when complete, the study will identify the preferred location for the structure as well as the development of a preliminary design, an implementation schedule, and financial model. The study is expected to take approximately one year to complete.

As the WHWRMP intends for the Pier 6 and 7 lands to be pedestrianized, the location, size, and timing of adequate required parking for the identified land uses within the commercial village is a significant factor in determining both the functional plan and the financial feasibility of the development blocks.

**Land Value – Financial Feasibility:**
For the purposes of this report, City staff did not complete a real estate financial appraisal of the individual Pier 6 and 7 development blocks. Staff believes a land appraisal would be a challenge at this time. Approved land-use, availability of adequate parking, timing of servicing, phasing and absorption of both the residential and proposed commercial developments on Pier 8, and the future of the City-owned HWT (Discovery) Centre building are all uncertain factors that would be key considerations in an appraisal.

However, previous staff reports have indicated the financial feasibility of the Pier 6 and 7 development blocks to be low, using traditional business-case metrics. As stated earlier, the Deloitte study dated April 2016 concluded the following:

i. Piers 6 and 7 noted a negative financial Present Value (PV) limiting its financial feasibility in the short-term;
ii. The land valuation of the Piers 6 and 7 commercial village will be sensitive to construction costs, commercial rental rates, and variations in market supply;
iii. Financial feasibility is likely to be enhanced by the absorption of a significant number of residential units from Pier 8;
iv. The financial feasibility of the Piers 6 and 7 development blocks will be highly sensitive to the ability to draw the public to the waterfront;
v. The City should consider the retention of this site, with the long-term vision of focusing public amenities on this site to help draw residents and visitors to the waterfront area.

**Retail and commercial uses study – Key Findings:**
Staff retained the firm Beauleigh, a Toronto-based retail consulting and brokerage firm, to conduct a Retail Analysis for the entire West Harbour area, but with specific attention to the proposed commercial village concept in the Piers 6 and 7 lands. The study
incorporated background data analysis (e.g. demographic studies, market analysis and market trends), identified potential uses/concepts to create a viable merchandise mix and successful retail environment, and created a critical path by identifying key areas and features which would spell success for the project. The full report is included as Appendix “A” to Report PED19191.

Highlights of the report are as follows:

- The perception of Hamilton as a growing city with a quality of life, is appealing to a younger urban demographic, which sees Hamilton as a more vibrant than suburban community;
- Creating a vision for a vibrant waterfront with animated public spaces, connectivity to downtown and experiential retail and commercial uses, unlike anything that currently exists and one with its own unique identity, heritage and culture, could be the defining characteristic;
- The vision for West Harbour should include innovative design, community development, inclusiveness, environment awareness, health and wellness, culture and the arts and improving the quality of life for all Hamiltonians;
- West Harbour could have a distinct advantage over other neighbouring waterfront communities, particularly Oakville and Burlington, which lack the history, cultural vibrancy, generational and ethnic diversity of Hamilton;
- The West Harbour waterfront must be more than a residential and commercial development if it is to distinguish Hamilton from its neighbours. It needs to be a place for people. Bringing the community in is important. There must be a strategic approach to the growth and development of the waterfront, to create a visitor destination, through creative placemaking and community-building initiatives;
- The focus of West Harbour must be to create a multi-purpose destination. Without sufficient density on the site, it will be impossible to create a pure retail destination which would be economically viable, profitable and sustainable;
- The retail must be carefully curated with a focus on unique and flexible concepts and destination uses;
- A multi-pronged strategy must be adopted. One which includes retail but does not make retail or commercial the key driver of the site. Retail cannot thrive if it is dependent only on the on-site residents, as there will not be enough density on the site at the outset to support it;
- Permanent and temporary installations promoting arts, culture and community, along with family friendly programming, special concerts and events, must be a key priority for the area;
- Definitive steps must be taken to include placemaking initiatives, promoting a 24-hour destination with a focus on walkability, accessibility and connectivity to the City and between all components on the site.

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Public Placemaking and Activation Plan – Initial Findings:
Staff identified a need to create a Placemaking and Activation Plan, to program the spaces within and between the public and private areas and look for ways to make this area a “people-place” in the immediate term during construction, as well as the eventual long-term. As part of this process, staff engaged the organization Project for Public Spaces (PPS) to lead a collaborative process to consult with the community and stakeholders on how institutional and commercial uses, both proposed and existing, can work to support the vibrant new public spaces proposed for the West Harbour area, by building on the well-established plans. PPS is a New York City based non-profit organization that has built a 40-year legacy on a placemaking approach that creates public spaces that engage people, foster a strong sense of place, and improve health and well-being. PPS has defined the term Placemaking as the following:

“Placemaking inspires people to collectively reimagine and reinvent public spaces as the heart of every community. Strengthening the connection between people and the places they share, placemaking refers to a collaborative process by which we can shape our public realm in order to maximize shared value. More than just promoting better urban design, placemaking facilitates creative patterns of use, paying particular attention to the physical, cultural, and social identities that define a place and support its ongoing evolution.”

As part of their work plan, PPS has completed a comprehensive environmental scan, has identified and researched relevant precedents that could be used in the West Harbour, has conducted a series of community and stakeholder sessions over two separate trips to Hamilton, has assisted in organizing a series of mini-activations on Piers 6 and 7, and will prepare a Placemaking and Activation Plan that includes:

- program matrix that lists proposed uses and activities;
- list of potential programming partners and associated programs;
- conceptual plan that illustrates the multiple sites and their key uses;
- preliminary overview of management implications;
- schematic plan with recommendations for amenities, physical interventions, and programming for the proposed “mini-activation”; and,
- Will participate in an on-site mini-activation session in 2020.

The City and PPS partnered in a Community Conversation meeting on August 22, 2019, PPS’s final report will be completed by the end of September 2019. Although the formal report is still in progress, some of the key observations include:

- The Placemaking and Activation Plan should incorporate the entire West Harbour Waterfront area, from Bayfront Park to the west and Eastwood Park to the east;
• There are significant placemaking and activation activities currently taking place in the area of Pier 8, primarily managed by the HWT, Pier 9, managed by Parks Canada with the HMCS Haida, on water activation by the various recreational boating clubs, marinas, and rowing clubs, in addition to the various public and private-led festivals and special event activities;
• As the various new public-space amenities are built over the course of the next few years (Pier 8 Promenade Park-Copps Pier, Gateway Park, and the main basin area - Pier 6 and 7 lands) a coordinated placemaking plan will be critical in creating a destination;
• Although important, commercial retail uses do not normally create a sense of place in and of themselves, rather retail usually requires complementary programming;
• The initial Placemaking programming should be centred around the areas of food and beverage, arts and culture, and health and well-being;
• Initial placemaking, especially during the interim construction period, should be viewed through the lense of creating impact as identified by PPS’s “Lighter-Quicker-Cheaper” approach, which focuses on less expensive and labour-intensive initiatives, which are the most effective ways to bring energy and life into a community’s public space; and,
• A long-term management plan is required to ensure the activation of the West Harbour as it develops over time.

Short-Term Lease and Animation Solution:

Staff’s recommended approach is to offer a short-term land lease (up to 3 years with renewal options at the City’s discretion) to an external entity, for the purposes of building, operating, and programming commercial and public-uses, within the Pier 6 and 7 lands. The recommendation seeks approval to offer this land-lease at a nominal value with all upfront capital and on-going operational costs to be borne by the approved external entity. Staff would also ensure that the terms of reference clearly identify the types of uses that would be acceptable to the City including the commercial, recreational, and public uses, as well as key deliverables including hours of service and programming objectives.

The recommended procurement process would establish minimum requirements and parameters that must be delivered by the external entity. These would address issues such as:
• Seasonality (i.e. activation in all seasons)
• Incorporation of art/culture component(s)
• Provision of a mix of program elements including food and recreation and elements that are attractive to a broad demographic
• Opportunities for vendors of varying scales
• Minimum requirements for delivering scheduled events / special events
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- Site design / architecture that contributes positively and seamlessly to the overall waterfront experience
- Option for the City to reserve and directly program a portion of some areas
- Option to integrate other city-owned waterfront lands
- Financial viability / business plan

Through the process of conducting both the retail and placemaking studies, staff has determined there are external entities that not only would be willing to invest in Piers 6 and 7 but would prefer a temporary location at the waterfront. The unpredictability of construction schedules, the lack of existing amenities in the area, and the phased plan for the Pier 8 residential development, are all factors that favour investments in short-term temporary facilities as opposed to permanent bricks-and-mortar development.

With that said, the expectation is that as the public-space amenities are constructed, become activated, and are enhanced by greater residential density on Pier 8, the value of the Pier 6 and 7 development blocks will increase and the marketability of the commercial and retail uses increases.

Alternatives for Consideration

Alternative #1: Land disposition of development-blocks through a land sale
This alternative would have the City immediately market the individual development blocks for sale to the private sector. This alternative could be implemented through a variety of measures from simply marketing the property and selling to the highest bidder, to a comprehensive solicitation process as was completed for the Pier 8 lands. The key element of this alternative is that the City will sell the property and transfer title to the property for a financial payment.

Alternative #2: Long-term land-leases (approx. 20-years) of the development-blocks
Similar to Option #1, this alternative would offer a long-term land-lease for the individual development blocks. This alternative would be consistent with the contractual arrangement in use with many of the boating clubs within the waterfront, including Macassa Bay Yacht Club, the Royal Hamilton Yacht Club, and the Leander Rowing Club. This alternative would reduce some of the risks identified with a full land-sale, however, the long-term contractual obligation would still be considered risky, given the factors identified.

Alternative #3: City funded capital for construction of development-blocks, with long-term tendency leases.
This alternative would have the City retain ownership of the development blocks and over time, develop, construct, operate, and lease the facilities within the development
blocks. This alternative would require the City to upfront the capital cost of construction and recoup this investment by way of leasing revenue over time.

ALIGNMENT TO THE 2016 – 2025 STRATEGIC PLAN

Strategic Priority #1
A Prosperous & Healthy Community
WE enhance our image, economy and well-being by demonstrating that Hamilton is a great place to live, work, play and learn.

Strategic Objective
1.1 Continue to grow the non-residential tax base.
1.3 Promote economic opportunities with a focus on Hamilton’s downtown core, all downtown areas and waterfronts.

APPENDICES AND SCHEDULES ATTACHED

Appendix “A” to Report PED19191 - West Harbour Retail Strategy & Recommendations Report

Appendix “B” to report PED19191 – Placemaking Along the West Harbourfront – A Community Conversation by Project for Public Places
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## Conclusion
Growth in industries in the city of Hamilton such as health care and education is helping to transform Hamilton and to redefine it as a city. Health care is the largest employment sector and the arts scene is thriving. Hamilton has also unwittingly become the benefactor of soaring real estate prices experienced in other major cities. All of these changes have helped to attract a very significant younger demographic, who are driving a cultural shift in the city. Young people across the who have abandoned the big city are not only bringing their homes to Hamilton but recreating their careers in the city as well. The moniker of “Steel City” no longer matches Hamilton’s reality. The city is growing and evolving. The challenge is in creatively imagining what or who she will become.

The opportunity at West Harbour to transform its waterfront could help reinforce this cultural shift. As young millennials and urbanites from the GTA look to Hamilton, seeking affordable housing and lower rents, it is increasingly building a reputation as a thriving arts and culture community, known for its diversity, growing food scene and sense of community. The perception of Hamilton as a growing city with a quality of life associated with affordable housing, raising a family, growing arts and culture scene as well as culinary experiences, are appealing to a broad urban demographic, which sees Hamilton as more vibrant than other suburban communities. This perception creates a compelling platform for West Harbour to capitalize on and to reinforce this vision for the city.

For many people, the future of Toronto real estate is in Hamilton. The city has become an oasis of value and space, where properties list for roughly half of what their Toronto equivalents would, where there’s a bounty of detached houses with sprawling yards, where you can get the big-city experience at a discount. The average price of a home in the city of Hamilton is $541,720—a bargain compared to Toronto, where the average is nearing the million-dollar mark. People are buying into something you just don’t get in Oakville or Burlington: the opportunity to become part of a historic city, not a suburb, that’s undergone a dramatic grassroots transformation over the past few years. In the first quarter of 2017, 23 per cent of people who bought homes in the Hamilton area were from the GTA.

– “The New Hamiltonians” Toronto Life, June 2017
As the GTHA continues to grow and densify, people are looking for alternative and convenient options, where a type of urban lifestyle can be duplicated outside of the city. West Harbour provides an opportunity to create a new vision and implement new ideas for what urban waterfronts can offer. It is a compelling space, strategically located, where the city meets the waterfront. Capturing and bottling Hamilton pride by embracing and celebrating both the grit and steel that still defines it as a city and melding it into a new youthful pride could differentiate it from other waterfront communities.

Creating a vision for a vibrant waterfront with animated public spaces, connectivity to downtown and experiential retail and commercial uses, unlike anything that currently exists and one with its own unique identity, heritage and culture could be the defining characteristic for this city and its future.

Diversity in type of residential and commercial uses, the use of public realm, a focus on arts, cultural events and programming, and how they all interact with the retail at West Harbour is critically important. Placemaking is much more than opening up retail shops. The relationship between people and the waterfront uses is key to West Harbour’s success, as is seamless connectivity between all of these components. Most importantly easy access to public transportation as for example outlined in the Port Credit developments, as well as access to mostly free and/or low-cost parking (free on weekends) that is available all day and all year long, to a multi-purpose waterfront will attract not only locals but tourists and residents from neighbouring communities as well. This is imperative if West Harbour’s waterfront development is to succeed. Accessibility and walkability throughout the Piers, ensuring a holistic connection throughout the project is key. The ability to create a waterfront destination and a sense of arrival through significant and captivating placemaking concepts, focusing on health and wellness, activity based retail and entertainment and active live/work concepts, where memories are made and experiences are created, will further define West Harbour’s success. West Harbour could be the key which solidifies and captures Hamilton’s identity as a city on the national and global stage.
1. Market Analysis
   a. Market and Retail Trends
   b. Demographic Analysis
   c. Target Markets
   d. SWOT Analysis
   e. Quantitative and Qualitative Market Analysis
MARKET & RETAIL TRENDS

The retail landscape is continuing to evolve and change at a more accelerated pace. Both landlords and retailers will need to be nimble and flexible to keep up with these changes.

The convergence of two very significant generations - the Millennials and Gen Z will dictate retail trends going forward, as these two generations gain significant purchasing power. This generational shift will play a more important role in setting behaviours than socio-economic differences do, as Millennials and Gen Z’ers influence the consciousness of retailers. They are impacting how brands present and position themselves.

The most significant impact will be in the area of technology and how retailers respond to this to create a seamless shopping experience across every channel, including bricks and mortar, will dictate success or failure.

Ease and convenience are paramount to the shopping experience. Landlords will need to address every aspect of their shopping environment.

• From the size of retail spaces to diversifying shopping destinations.
• Creating flexibility in spaces with the ability to transition and transform as trends change.
• Densifying sites with office, residential, hotels and entertainment venues.
• Creating multi-purpose spaces.
• Tenant mix will need to be meticulously and carefully curated to address and answer the demands and needs of the consumer.
• Finding the appropriate balance in tenant mix between nationals and independents, as the pool of national tenants continues to dry up.
• Retail, office and service platforms which have been considered not “mall worthy” such as grocery stores, medical centres, spas, movie theatres, co-working spaces, fitness centres, event spaces and entertainment centres will play a major role in transforming retail environments and driving traffic. These will become an important part of the retail experience in the future.

As a result of this evolution, landlords will need to address the realities of shrinking store formats, less stores, reduced capex and inventory and limited or no covenants. Tenants will be less willing to invest in over the top fit-outs of their stores, as the need for long term leases is diminished. For the landlord, this will mean pursuing more innovative ways of balancing tenant mix and identifying key strategies to drive traffic, sales and ultimately revenue. Lastly, using innovative ways of structuring leases with more flexible lease terms will be key to securing this new generation of tenants.
MARKET & RETAIL TRENDS

FOOD HALLS

The idea of food halls has fast gained traction in North America. Although, Canada has been a late adoptee. The signing of the first Eataly in Canada at Manulife Centre at Bay and Bloor, which will open in October of 2019, has been a catalyst to this new phenomenon, creating a lot of buzz.

Food halls are not simply replacements of food courts or synonymous with food courts. They are unique and their success is completely dependent on the ability to curate something which is reflective not only of the space and its surroundings, but the community and its people. It has to be unique, not cookie cutter and the tenancies must reflect the boldness and quality of the best local independent operators.

WHAT HAS SPARKED A RISE IN FOOD HALLS?

- The rising interest in a foodie culture and instagrammable food trends.
- The erosion of traditional retail in urban centers and shopping centers.
- Millennials who provide a retrospective view of the world, evident in their quest for new and engaging experiences.
- The need for experiential retail formats to replace the cookie cutter sterility of traditional shopping formats.
- The emergence of food trucks and street food – vendors are delivering authentic food in non-traditional spaces.
- The move towards chef-driven offerings, embraced not only by millennials but the older generation as well.
- Landlords struggling to fill vacant space previously occupied by major department stores or large fashion tenants.

MARKET & RETAIL TRENDS

FOOD HALLS IN NORTH AMERICA: A TIME LINE

By 2020 the North American food hall market will nearly triple in size.

- **2015**
  - There was approx. 70 food hall projects announced and under construction in the United States

- **2016**
  - 70
  - In 2016 the number of food hall projects in the United States grew to 86

- **2017**
  - 86
  - In 2017 the number of food hall projects in the United States and now including Canada, grew to 118

- **2018**
  - 118
  - In 2018, the food hall count is set to rise to 140 this year across Canada and the US.

- **2019**
  - 140
  - In 2019, the number of food hall projects across Canada and the US is set to rise to 200+

- **2020**
  - 200
  - By the end of 2020, the number of food halls in North America is expected to rise to approx. 450
MARKET & RETAIL TRENDS

FOOD HALLS
OPEN IN CANADA

Curated by Beaulieh

Assembly Chef’s Hall
Toronto, ON

Annex Food Hall
Toronto, ON

Avenida Food Hall & Fresh Market
Calgary, AB

Food District
Square One - Mississauga, ON

Harbour Eats
Toronto, ON

Market & Co.
New Market, ON

Saks Food Hall by Pusateri’s
Yorkville, Eaton Centre & Sherway Gardens
Toronto & Mississauga, ON

Queen St. Fare
Ottawa, ON

MARKET & RETAIL TRENDS

FOOD HALLS
COMING SOON TO CANADA

Curated by Beaulieh

Hargrave St. Market at True North Square
Winnipeg, MB
Q2 2019

Eataly at Manulife Centre
Toronto, ON
Q4 2019

Time Out Market
Montreal, Quebec
Q4 2019

The Well
Toronto, ON
Q2 2020

Fresh Market at Union Station
Toronto, ON
Q4 2020

Williams Hall
Edmonton, AB
2020

Waterworks
Toronto, ON

The Kitchen
Oakridge Centre - Vancouver, BC
2025
EVOLUTION OF GROCERY STORES

Smaller urban format grocery stores continue to be relevant, driven by time pressed customers who no longer want to spend hours in a 50,000 SF+ store.

POP-UP RETAIL

COMING SOON TO CANADA

Pop-ups are fueling the retail revolution. The retail industry is evolving faster than ever before. There has been a shift in demographics and it's no secret that customers long for experiences and love the idea of something new. Landlords must react to this need-for-change and devote permanent space(s) to a constant, ever changing roster of pop-ups.

Pop-up retail in Canada is becoming more common than ever, with retailers and landlords coordinating temporary leases in a variety of interesting ways. It was not that long ago that pop-up retail was seen as a solution to fill a challenging space or seasonal endeavours.

In Canada, the pop-up scene has grown exponentially and is now seen by retailers as an opportunity to give their brand exposure, test it in an unfamiliar market or test new concepts. While for landlords, it allows them to introduce fresh concepts to the mix, acting as an incubator for brands and providing them with a platform to launch a new concept, or test an existing concept in a proven retail environment, creating a win for both parties.

MUJI

BERLIN, GERMANY

- World’s first grocery store for start-ups and new products that provide its partners with feedback based on market research.
- Kadete new innovative concept will only carry new products, but also help start-ups with market research to gather important insights about their product in order to build up credibility for investment and long-term sustainability and success.

TOKYO, JAPAN

- MUJI’s flagship at Ginza Six in Tokyo, spans over six floors. Here you can find a curated grocery store on the first floor.
- The grocery store includes a bakery, juice bar and a personalized tea service, with a fresh produce section outlining details on where the local food originated from and various recipes on how to prepare them, depending on the season.

INSTAGRAM

DICTATING DESIGN

Creating Instagrammable Moments
This is now part of architectural briefs. Clients are asking designers and architects to consider Instagram as a main objective when designing projects.

Attracting Millennials and Gen Z’s These demographic groups are driving the social media trends as they expect everything to be interactive and Instagrammable. These groups are always looking for a unique experience that they can share online.
EXPERIENTIAL RETAIL

Experience is the key to the future of commerce. Retail environments must be a compelling place where consumers want to spend time, not just transact. Experiential retail provides the customer with an unforgettable experience and human connection.

RETAILTAINMENT

As a driver of experiential retail, “retailtainment” will dominate the retail industry by fusing retail, entertainment and leisure. Creating a more immersive retail experience by enhancing the environment and elevating the overall experience, leaving customers with memories, not just products, which will keep them coming back time and time again. Developers need to maintain a balance between retail, F&B and entertainment to be successful.

EXAMPLES OF RECREATIONAL/ENTERTAINMENT AND IMMERSIVE CONCEPTS:

- Movie Theatres (Indoor/Outdoor)
- Virtual Reality
- Bowling
- Axe Throwing
- Adult Arcades/Game Centres
- Ice Rinks (Indoor/Outdoor)
- Indoor Skiing
- Indoor Skate Park
- Escape Rooms
- Aquariums
- Kid Park/Indoor Theme-Parks
- Zoo/Animal Centres
- Food Halls
- Outdoor Stage
- Sports Park
- Go-Karting
- Mini putt
- Indoor Waterpark
- Tech Hubs
- Art Galleries & Museums
**SUMMARY & HIGHLIGHTS**

In order to succeed in understanding what West Harbour could and should be, it is important to understand the demographics in the area and to address both the challenges and opportunities associated with existing and projected statistics. A multi-disciplinary approach with a long-term perspective is crucial when it comes to identifying the needs of the demographics.

Ultimately West Harbour must be a place that is treasured by the local community, embraced by outsiders and tourists and enjoyed by generations to come.

We took an in-depth look at both the demographics in the city of Hamilton and the area within a 3 km radius of Pier 8/Block 9 (47 Discovery Drive). Below are our findings:

**CITY OF HAMILTON**

- Existing population is 570,654 people (51% female, 49% male) with an average household income of $93,605
- By 2023, the population will increase 3.9% and the average household income will increase 13%
- 44.1% of the population is under 38; 22.8% of the population is Gen Z (ages 3 to 23) and 21.3% of the population is Millennials (ages 24 to 38)
- 47.7% of the city’s population is between the ages of 20 and 54
- 25.2% of the total population are children living at home under 24 years old
- 18.9% of the population is a visible minority
- 32.5% of homes are rented

**3KM RADIUS OF PIERS 6-8**

- Existing population is 58,776 people (49% female, 51% male) with an average household income of $61,059
- By 2023, the population will increase 2.7% and the average household income will increase 14.4%
- 46.2% of the population is under 38; 19.2% of the population is Gen Z (ages 3 to 23) and 27% of the population is Millennials (ages 24 to 38)
- 52.4% of the population is between the ages of 20 and 54
- 18.3% of the total population are children living at home under 24 years old
- 26.7% of the population is a visible minority
- 68.1% of homes are rented

The following is the complete demographic analysis:
### Demographic Analysis

**City of Hamilton**

**Hamilton, Ontario**

Source: Environics Analytics

---

#### Total Living Population 2018 & 2023

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>21%</td>
<td>20.7%</td>
</tr>
<tr>
<td>20-34</td>
<td>21.7%</td>
<td>20.4%</td>
</tr>
<tr>
<td>35-54</td>
<td>26%</td>
<td>25.9%</td>
</tr>
<tr>
<td>55-64</td>
<td>14%</td>
<td>13.7%</td>
</tr>
<tr>
<td>65+</td>
<td>17.6%</td>
<td>19.4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>570,654</td>
<td>586,024</td>
</tr>
</tbody>
</table>

#### Households 2018

Total Households is defined as the sum of Family Households and Non-Family Households.

- Total Family Households: 154,734 (68.1%)
- Non-Family Households: 72,556 (31.9%)

Note: The Family Household demographic category is defined as two-or-more related people living together in a household, i.e., married or common-law without children, parents with children, and/or single-parent with children.

#### Children Living at Home 2018

- Total Number of Children living at home (0-25+): 181,424 (31.8%)
- Children living at home under 24: 144,051
- Children living at home 25+: 37,373

Note: *Percentage represents total number of children living at home (0-25+) within the total population.

---

#### Visible Minorities

<table>
<thead>
<tr>
<th>Minority</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>1.3%</td>
</tr>
<tr>
<td>South Asian</td>
<td>4.2%</td>
</tr>
<tr>
<td>Black</td>
<td>3.9%</td>
</tr>
<tr>
<td>Filipino</td>
<td>2.1%</td>
</tr>
<tr>
<td>Latin American</td>
<td>1.7%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>1%</td>
</tr>
<tr>
<td>Arab</td>
<td>1.6%</td>
</tr>
<tr>
<td>West Asian</td>
<td>1%</td>
</tr>
<tr>
<td>Korean</td>
<td>0.6%</td>
</tr>
<tr>
<td>Japanese</td>
<td>0.2%</td>
</tr>
<tr>
<td>Visible Minority Not Listed</td>
<td>0.3%</td>
</tr>
<tr>
<td>Multiple Visible Minority</td>
<td>0.6%</td>
</tr>
<tr>
<td>NonVisible Minority</td>
<td>81.1%</td>
</tr>
<tr>
<td>TOTAL Visible Minorities</td>
<td>18.9%</td>
</tr>
</tbody>
</table>

Note: All demographics by age is defined by a fixed bracket. The data within an age group (i.e., 20-34) is not continuous outside of the ± 5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).

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#### Demographic Highlights 2018 & 2023

<table>
<thead>
<tr>
<th>Category</th>
<th>2018 [Existing]</th>
<th>2023 [Projected]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (24-38)</td>
<td>21.3%</td>
<td>21.9%</td>
</tr>
<tr>
<td>Gen Z (3-23)</td>
<td>22.8%</td>
<td>21.2%</td>
</tr>
<tr>
<td>20-44 Years Old</td>
<td>34.3%</td>
<td>34.1%</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$93,605</td>
<td>$105,925</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$69,926</td>
<td>$78,422</td>
</tr>
<tr>
<td>Bachelor’s Degree or Higher</td>
<td>21.8%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Owned Dwellings</td>
<td>67.5%</td>
<td>67.6%</td>
</tr>
<tr>
<td>Rented Dwellings</td>
<td>32.5%</td>
<td>32.4%</td>
</tr>
<tr>
<td>Population Increase from 2018-2023</td>
<td>2.7%</td>
<td></td>
</tr>
<tr>
<td>TOTAL POPULATION</td>
<td>570,654</td>
<td>586,024</td>
</tr>
</tbody>
</table>

Note: *Percentage represents total number of children living at home (0-25+) within the total population.*
**DEMOGRAPHIC ANALYSIS**

**WEST HARBOUR**

47 DISCOVERY DRIVE

HAMILTON, ONTARIO

Source: Environics Analytics

---

**DEMOGRAPHIC HIGHLIGHTS WITHIN 3KM 2018 & 2023**

<table>
<thead>
<tr>
<th>3KM</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (24-36)</td>
<td>27%</td>
<td>27.7%</td>
</tr>
<tr>
<td>Gen Z (3-23)</td>
<td>19.2%</td>
<td>17.3%</td>
</tr>
<tr>
<td>20-44 Years Old</td>
<td>40.4%</td>
<td>39.6%</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$61,059</td>
<td>$69,902</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$41,670</td>
<td>$48,357</td>
</tr>
<tr>
<td>Bachelor's Degree or Higher</td>
<td>21.5%</td>
<td>23.5%</td>
</tr>
<tr>
<td>Owned Dwellings</td>
<td>31.9%</td>
<td>32.3%</td>
</tr>
<tr>
<td>Rented Dwellings</td>
<td>68.1%</td>
<td>67.7%</td>
</tr>
<tr>
<td>Population Increase from 2018 – 2023</td>
<td>3.9%</td>
<td></td>
</tr>
<tr>
<td>TOTAL POPULATION</td>
<td>58,776</td>
<td>61,083</td>
</tr>
</tbody>
</table>

---

**TOTAL LIVING POPULATION 2018**

<table>
<thead>
<tr>
<th>AGE</th>
<th>1 KM</th>
<th>2 KM</th>
<th>3 KM</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>21.1%</td>
<td>20%</td>
<td>16.4%</td>
</tr>
<tr>
<td>20-34</td>
<td>25%</td>
<td>27%</td>
<td>27.8%</td>
</tr>
<tr>
<td>35-54</td>
<td>27%</td>
<td>25.8%</td>
<td>24.6%</td>
</tr>
<tr>
<td>55-64</td>
<td>13.6%</td>
<td>14.3%</td>
<td>13.7%</td>
</tr>
<tr>
<td>65+</td>
<td>13.7%</td>
<td>12.6%</td>
<td>17.7%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>3,937</td>
<td>16,679</td>
<td>58,776</td>
</tr>
</tbody>
</table>

**TOTAL LIVING POPULATION 2023**

<table>
<thead>
<tr>
<th>AGE</th>
<th>1 KM</th>
<th>2 KM</th>
<th>3 KM</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>20.9%</td>
<td>19.9%</td>
<td>16.4%</td>
</tr>
<tr>
<td>20-34</td>
<td>32.5%</td>
<td>25%</td>
<td>25.4%</td>
</tr>
<tr>
<td>35-54</td>
<td>27.1%</td>
<td>26%</td>
<td>25.1%</td>
</tr>
<tr>
<td>55-64</td>
<td>13.2%</td>
<td>13.8%</td>
<td>13.3%</td>
</tr>
<tr>
<td>65+</td>
<td>15.3%</td>
<td>15.2%</td>
<td>19.7%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,010</td>
<td>17,477</td>
<td>61,083</td>
</tr>
</tbody>
</table>

---

**HOUSEHOLDS 2018**

Total Households is defined as the sum of Family Households and Non-Family Households.

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Households</td>
<td>29,149</td>
</tr>
<tr>
<td>Total Family Households</td>
<td>13,284 (45.6%)</td>
</tr>
<tr>
<td>Non-Family Households</td>
<td>15,865 (54.4%)</td>
</tr>
</tbody>
</table>

Note: The Family Households is defined as two or more people living together within a relationship, i.e., married or common-law without children, parents with children, and/or single-parent with children. The Non-Family is defined as those people who are single-person household and/or living with household without relationship.

---

**VISIBLE MINORITIES WITHIN 3KM 2018**

<table>
<thead>
<tr>
<th>3 KM / 2018</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>3.6%</td>
</tr>
<tr>
<td>South Asian</td>
<td>3.9%</td>
</tr>
<tr>
<td>Black</td>
<td>6.7%</td>
</tr>
<tr>
<td>Filipino</td>
<td>2.5%</td>
</tr>
<tr>
<td>Latin American</td>
<td>2.7%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>3.3%</td>
</tr>
<tr>
<td>Arab</td>
<td>1.5%</td>
</tr>
<tr>
<td>West Asian</td>
<td>0.9%</td>
</tr>
<tr>
<td>Korean</td>
<td>0.8%</td>
</tr>
<tr>
<td>Japanese</td>
<td>0.1%</td>
</tr>
<tr>
<td>Visible Minority Not Listed</td>
<td>0.1%</td>
</tr>
<tr>
<td>Total Visible Minorities</td>
<td>20.7%</td>
</tr>
</tbody>
</table>

Note: The Aboriginal is defined as visible minority if they are visible minorities without relationship.

---

**CHILDREN LIVING AT HOME 2018**

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Number of Children living at home (0-25+)</td>
<td>13,685 (23.3%)*</td>
</tr>
<tr>
<td>Children living at home under 24</td>
<td>10,757</td>
</tr>
<tr>
<td>Children living at home 25+</td>
<td>2,928</td>
</tr>
</tbody>
</table>

Note: *Percentage represents total number of children living at home (0-25+) within the total population.
In addition to Hamilton, we also analyzed its neighbouring waterfront communities; downtown Oakville, Bronte, downtown Burlington, Port Credit as well as the Harbourfront downtown Toronto. Below are a summary of our findings:

### DEMOGRAPHIC ANALYSIS

### COMPETITIVE WATERFRONT NEIGHBOURHOODS

**SUMMARY & HIGHLIGHTS**

Source: Environics Analytics

In addition to Hamilton, we also analyzed its neighbouring waterfront communities; downtown Oakville, Bronte, downtown Burlington, Port Credit as well as the Harbourfront downtown Toronto. Below are a summary of our findings:

#### COMPARISON BETWEEN PIERS 6-8 AND SURROUNDING COMPETITIVE WATERFRONT COMMUNITIES:

<table>
<thead>
<tr>
<th>Index (2018)</th>
<th>3 km from Piers 6-8</th>
<th>Downtown Oakville</th>
<th>Bronte</th>
<th>Downtown Burlington</th>
<th>Port Credit</th>
<th>Toronto Harbourfront</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>58,776</td>
<td>3,838</td>
<td>17,924</td>
<td>7,296</td>
<td>11,598</td>
<td>15,317</td>
</tr>
<tr>
<td>Millennials [24-38]</td>
<td>27%</td>
<td>13%</td>
<td>13.50%</td>
<td>21.10%</td>
<td>22.80%</td>
<td>44.30%</td>
</tr>
<tr>
<td>Gen Z [3-23]</td>
<td>19.20%</td>
<td>17%</td>
<td>20.80%</td>
<td>12.10%</td>
<td>14.50%</td>
<td>10.90%</td>
</tr>
<tr>
<td>20-44 Years Old</td>
<td>40.40%</td>
<td>23.20%</td>
<td>26.40%</td>
<td>30.50%</td>
<td>24.50%</td>
<td>58.40%</td>
</tr>
<tr>
<td>65 Years +</td>
<td>17.70%</td>
<td>33.40%</td>
<td>25%</td>
<td>31.90%</td>
<td>21.80%</td>
<td>12.30%</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$61,06</td>
<td>$199,017</td>
<td>$149,583</td>
<td>$77,207</td>
<td>$104,079</td>
<td>$155,815</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$41,670</td>
<td>$96,341</td>
<td>$108,044</td>
<td>$53,591</td>
<td>$63,286</td>
<td>$77,876</td>
</tr>
<tr>
<td>Bachelor’s Degree or Higher</td>
<td>21.50%</td>
<td>42.40%</td>
<td>46.20%</td>
<td>37.50%</td>
<td>31.90%</td>
<td>71.40%</td>
</tr>
<tr>
<td>Owned Dwellings</td>
<td>31.90%</td>
<td>55.30%</td>
<td>75%</td>
<td>30.20%</td>
<td>36.10%</td>
<td>50.50%</td>
</tr>
<tr>
<td>Rented Dwellings</td>
<td>68.10%</td>
<td>44.70%</td>
<td>25%</td>
<td>69.80%</td>
<td>63.90%</td>
<td>49.50%</td>
</tr>
<tr>
<td>Visible Minority</td>
<td>26.70%</td>
<td>14.90%</td>
<td>20.30%</td>
<td>11.90%</td>
<td>19.30%</td>
<td>42.60%</td>
</tr>
</tbody>
</table>

Note: The boundaries for the waterfront communities have all been determined according to regional and municipal jurisdictions. As for the 1-3KM radii for Piers 6 to 8, because there is no official waterfront community boundary as of yet, and there is limited density on site, the use of the 3 KM radius has been used as a gauge to include neighbouring communities in Hamilton and Burlington within an approximate 10-minute drive commute.

### HIGHLIGHTS

- After Toronto, Hamilton has the youngest population of all the waterfront communities. Millennials make up 27% of the downtown population and the 20 -44 year old age group is a healthy 40.4% of the population, statistics which bode well for the revitalization of the downtown, especially when compared to downtown Oakville as an example, which has only 13% Millennials and the 20-44 year olds represent only 23.2% of its population. The lack of a younger demographic in downtown Oakville has hindered its ability to evolve as a community.
- Hamilton’s average household income is significantly lower than almost all waterfront communities with the exception of Burlington. The percentage of renters in downtown Hamilton (68.1%) is comparable to Burlington (69.8%) and with increased condo density at West Harbour the number of owned dwellings should increase.
- Downtown Hamilton has a diverse population with 26.7% being a visible minority. Only Toronto’s Waterfront is higher at 42.6%. Diversity is an important factor in creating a vibrant community.
## Total Living Population 2018 & 2023

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>21%</td>
<td>20.7%</td>
</tr>
<tr>
<td>20-34</td>
<td>21.7%</td>
<td>20.4%</td>
</tr>
<tr>
<td>35-54</td>
<td>26%</td>
<td>25.9%</td>
</tr>
<tr>
<td>55-64</td>
<td>14%</td>
<td>13.7%</td>
</tr>
<tr>
<td>65+</td>
<td>17.6%</td>
<td>19.4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>570,654</td>
<td>586,024</td>
</tr>
</tbody>
</table>

## Households 2018

- Total Households: 1,882
- Total Family Households: 1,133 (60.2%)
- Non-Family Households: 749 (39.8%)

Note: The Family Household demographic category is defined as two or more people living together within a relationship, i.e., married or common-law without children, parents with children, and/or single-parent with children. The Non-Family category is defined as those people who are single/person- person household and/or living with housemates without relationship.

## Children Living at Home 2018

- Total Number of Children living at home (0-25+): 901 (23.5%)
- Children living at home under 24: 700
- Children living at home 25+: 201

Note: *Percentage represents total number of children living at home (0-25+) within the total population.

## Visible Minorities

<table>
<thead>
<tr>
<th>Minority</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>1.6%</td>
</tr>
<tr>
<td>South Asian</td>
<td>1.6%</td>
</tr>
<tr>
<td>Black</td>
<td>6.8%</td>
</tr>
<tr>
<td>Filipino</td>
<td>1.0%</td>
</tr>
<tr>
<td>Latin American</td>
<td>1.1%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>0.6%</td>
</tr>
<tr>
<td>Arab</td>
<td>0.6%</td>
</tr>
<tr>
<td>West Asian</td>
<td>0.9%</td>
</tr>
<tr>
<td>Korean</td>
<td>0.4%</td>
</tr>
<tr>
<td>Japanese</td>
<td>0.0%</td>
</tr>
<tr>
<td>Visible Minority Not Listed</td>
<td>0.7%</td>
</tr>
<tr>
<td>Multi-Visible Minority</td>
<td>0.0%</td>
</tr>
<tr>
<td>Non-Visible Minority</td>
<td>85.1%</td>
</tr>
<tr>
<td>TOTAL Visible Minorities</td>
<td>14.9%</td>
</tr>
</tbody>
</table>

Note: All demographics by age is defined by a fixed bracket. The data within an age group (i.e., 20-34) is not continuous outside of the ±5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).

---

**Visible Minorities**

- Chinese: 1.6%
- South Asian: 1.6%
- Black: 6.8%
- Filipino: 1.0%
- Latin American: 1.1%
- Southeast Asian: 0.6%
- Arab: 0.6%
- West Asian: 0.9%
- Korean: 0.4%
- Japanese: 0.0%
- Visible Minority Not Listed: 0.7%
- Multi-Visible Minority: 0.0%
- Non-Visible Minority: 85.1%
- TOTAL Visible Minorities: 14.9%
OAKVILLE, ONTARIO

DEMOGRAPHIC ANALYSIS

Total Living Population 2018 & 2023

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>19.5%</td>
<td>18.7%</td>
</tr>
<tr>
<td>20-34</td>
<td>26.6%</td>
<td>24.2%</td>
</tr>
<tr>
<td>35-54</td>
<td>25.4%</td>
<td>15.3%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
<td>14.1%</td>
</tr>
<tr>
<td>65+</td>
<td>13.5%</td>
<td>27.4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>17,924</td>
<td>18,828</td>
</tr>
</tbody>
</table>

Households 2018

- Total Households: 7,399
- Total Family Households: 5,155 (69.7%)
- Total Non-Family Households: 2,244 (30.3%)

Children Living at Home 2018

- Total Number of Children living at home (0-25+): 5,286 (29.2%)
- Children living at home under 24: 4,215
- Children living at home 25+: 1,071

Note: All demographics by age is defined by a fixed bracket. The data within an age group (i.e., 20-24) is not continuous outside of the ±5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).

Visible Minorities 2018

- Chinese: 3.8%
- South Asian: 4.9%
- Black: 2.4%
- Filipino: 1.6%
- Latin American: 1.0%
- Southeast Asian: 0.3%
- Arab: 1.9%
- West Asian: 0.9%
- Korean: 1.4%
- Japanese: 0.7%
- Visible Minority Not Listed: 0.5%
- Multiple Visible Minority: 1.0%
- Non Visible Minority: 79.7%
- Total Visible Minorities: 20.3%

Note: *Percentage represents total number of children living at home (0-25+) within the total population.
**DEMOGRAPHIC HIGHLIGHTS 2018 & 2023**

<table>
<thead>
<tr>
<th></th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Millennials (24-38)</strong></td>
<td>21.1%</td>
<td>22.3%</td>
</tr>
<tr>
<td><strong>Gen Z (3-23)</strong></td>
<td>12.1%</td>
<td>11.4%</td>
</tr>
<tr>
<td>20-44 Years Old</td>
<td>30.5%</td>
<td>30.8%</td>
</tr>
<tr>
<td><strong>Average Household Income</strong></td>
<td>$77,207</td>
<td>$85,766</td>
</tr>
<tr>
<td><strong>Median Household Income</strong></td>
<td>$53,591</td>
<td>$59,776</td>
</tr>
<tr>
<td><strong>Bachelor’s Degree or Higher</strong></td>
<td>37.5%</td>
<td>41.7%</td>
</tr>
<tr>
<td><strong>Owned Dwellings</strong></td>
<td>30.2%</td>
<td>30.6%</td>
</tr>
<tr>
<td><strong>Rented Dwellings</strong></td>
<td>69.8%</td>
<td>69.4%</td>
</tr>
<tr>
<td><strong>Population Increase from 2018 to 2023</strong></td>
<td>11.1%</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL POPULATION</strong></td>
<td>7,926</td>
<td>8,107</td>
</tr>
</tbody>
</table>

Note: All demographics by age is defined by a fixed bracket. The data within an age group (i.e., 20-44) is not continuous outside of the ± 5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).

**HOUSEHOLDS 2018**

Total Households: 4,176
Total Family Households: 1,866 (44.7%)
Non-Family Households: 2,310 (55.3%)

**CHILDREN LIVING AT HOME 2018**

Total Number of Children living at home (0-25+): 1,169 (14.8%)
Children living at home under 24: 846
Children living at home 25+: 323

Note: *Percentage represents total number of children living at home (0-25+) within the total population.

**VISIBLE MINORITIES**

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>1.3%</td>
</tr>
<tr>
<td>South Asian</td>
<td>2.0%</td>
</tr>
<tr>
<td>Black</td>
<td>3.2%</td>
</tr>
<tr>
<td>Filipino</td>
<td>0.2%</td>
</tr>
<tr>
<td>Latin American</td>
<td>2.1%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>0.2%</td>
</tr>
<tr>
<td>Arab</td>
<td>1.8%</td>
</tr>
<tr>
<td>West Asian</td>
<td>0.9%</td>
</tr>
<tr>
<td>Korean</td>
<td>0.1%</td>
</tr>
<tr>
<td>Japanese</td>
<td>0.0%</td>
</tr>
<tr>
<td>Visible Minority Not Listed</td>
<td>0.1%</td>
</tr>
<tr>
<td>Multiple Visible Minority</td>
<td>0.2%</td>
</tr>
<tr>
<td>Non Visible Minority</td>
<td>88.1%</td>
</tr>
<tr>
<td>TOTAL Visible Minorities</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

**TOTAL LIVING POPULATION 2018 & 2023**

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>10.1%</td>
<td>10.3%</td>
</tr>
<tr>
<td>20-34</td>
<td>21%</td>
<td>20.6%</td>
</tr>
<tr>
<td>35-54</td>
<td>21.5%</td>
<td>21.1%</td>
</tr>
<tr>
<td>55-64</td>
<td>15.7%</td>
<td>15.6%</td>
</tr>
<tr>
<td>65+</td>
<td>31.9%</td>
<td>32.2%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>7,926</td>
<td>8,107</td>
</tr>
</tbody>
</table>

Note: The Family Household demographic category is defined as two-or-more people living together within a relationship, i.e., married or common-law without children, parents with children, and/or single-parent with children. The Non-Family category is defined as those people who are single/person or living with housemates (without relationship).
**Total Living Population 2018 & 2023**

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>13.8%</td>
<td>13.7%</td>
</tr>
<tr>
<td>20-34</td>
<td>20.8%</td>
<td>19.1%</td>
</tr>
<tr>
<td>35-54</td>
<td>28.4%</td>
<td>27%</td>
</tr>
<tr>
<td>55-64</td>
<td>15.8%</td>
<td>15.7%</td>
</tr>
<tr>
<td>65+</td>
<td>21.8%</td>
<td>24.3%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>11,598</td>
<td>12,346</td>
</tr>
</tbody>
</table>

**Households 2018**

Total Households: 6,902
Non-Family Households: 2,979 (50.5%)

**Children Living at Home 2018**

Total Number of Children living at home (0-25+): 2,440 (21%)
Children living at home under 24: 1,915
Children living at home 25+: 525

**Visible Minorities**

- Chinese: 2.4%
- South Asian: 3.9%
- Black: 2.9%
- Filipino: 1.6%
- Latin American: 1.9%
- Southeast Asian: 0.3%
- Arab: 2.9%
- West Asian: 0.4%
- Korean: 0.6%
- Japanese: 0.2%
- Visible Minority Not Listed: 1.2%
- Multiple Visible Minority: 1.1%
- Non Visible Minority: 80.7%
- TOTAL Visible Minorities: 19.3%

**Notes:**
- The Family Household demographic category is defined as two-or-more people living together within a relationship, i.e., married or common-law without children, parents with children, and/or single-parent with children.
- The Non-Family category is defined as those people who are single/person-person household and/or living with housemates (without relationship).
- All demographics by age is defined by a fixed bracket. The data within an age group i.e., 20-24 is not continuous outside of the +/- 5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).
**DEMOGRAPHIC ANALYSIS**

**TORONTO HARBOURFRONT**
TORONTO, ONTARIO  
Source: Environics Analytics

**TOTAL LIVING POPULATION 2018 & 2023**

<table>
<thead>
<tr>
<th>AGE</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
<td>8.2%</td>
<td>10%</td>
</tr>
<tr>
<td>20-34</td>
<td>39.1%</td>
<td>32.5%</td>
</tr>
<tr>
<td>35-54</td>
<td>29.9%</td>
<td>34.2%</td>
</tr>
<tr>
<td>55-64</td>
<td>10.6%</td>
<td>10%</td>
</tr>
<tr>
<td>65+</td>
<td>12.3%</td>
<td>13.5%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>15,317</td>
<td>16,850</td>
</tr>
</tbody>
</table>

**HOUSEHOLDS 2018**

Total Households is defined as the sum of Family Households and Non-Family Households.

<table>
<thead>
<tr>
<th>Housesholds</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Households</td>
<td>9,052</td>
</tr>
<tr>
<td>Total Family Households</td>
<td>3,730 (42.2%)</td>
</tr>
<tr>
<td>Non-Family Households</td>
<td>5,322 (58.8%)</td>
</tr>
</tbody>
</table>

**CHILDREN LIVING AT HOME 2018**

<table>
<thead>
<tr>
<th>Children living at home</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>at home (0-24)</td>
<td>1,809 (11.8%)</td>
</tr>
<tr>
<td>at home (25+)</td>
<td>1,415</td>
</tr>
</tbody>
</table>

**VISIBLE MINORITIES**

<table>
<thead>
<tr>
<th>Minority</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>12.4%</td>
</tr>
<tr>
<td>South Asian</td>
<td>10.7%</td>
</tr>
<tr>
<td>Black</td>
<td>1.4%</td>
</tr>
<tr>
<td>Filipino</td>
<td>2.7%</td>
</tr>
<tr>
<td>Latin American</td>
<td>1.7%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>1.8%</td>
</tr>
<tr>
<td>Arab</td>
<td>3.8%</td>
</tr>
<tr>
<td>West Asian</td>
<td>2.4%</td>
</tr>
<tr>
<td>Korean</td>
<td>1.4%</td>
</tr>
<tr>
<td>Japanese</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

**DEMOGRAPHIC HIGHLIGHTS 2018 & 2023**

<table>
<thead>
<tr>
<th>Category</th>
<th>2018 (Existing)</th>
<th>2023 (Projected)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (24-38)</td>
<td>44.3%</td>
<td>41.7%</td>
</tr>
<tr>
<td>Gen Z (18-35)</td>
<td>10.9%</td>
<td>9.8%</td>
</tr>
<tr>
<td>20-44 Years Old</td>
<td>58.4%</td>
<td>55.5%</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$155,815</td>
<td>$180,447</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$77,876</td>
<td>$86,326</td>
</tr>
<tr>
<td>Bachelor's Degree or Higher</td>
<td>71.4%</td>
<td>74.8%</td>
</tr>
<tr>
<td>Owned Dwellings</td>
<td>50.5%</td>
<td>49.5%</td>
</tr>
<tr>
<td>Rented Dwellings</td>
<td>49.5%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Population Increase from 2018-2023</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>TOTAL POPULATION</td>
<td>15,317</td>
<td>16,850</td>
</tr>
</tbody>
</table>

Note: All demographics by age is defined by a fixed bracket. The data within an age group i.e., 20-24 is not continuous outside of the + or – 5 year projection. Thus, the age interval does not shift between 2018 and 2023 (e.g., a 52-year-old in the 2018 category is not included in the 2023 projection data).
DEMOGRAPHIC ANALYSIS

LIVING & REAL ESTATE
HAMILTON & SURROUNDING CITIES

<table>
<thead>
<tr>
<th>CITY</th>
<th>AVERAGE $ CONDO (2 BEDROOM)</th>
<th>AVERAGE $ TOWNHOME (2 BEDROOM)</th>
<th>AVERAGE $ DETACHED HOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hamilton</td>
<td>Own $285k Rent/Per Month $1,473</td>
<td>Own $498k</td>
<td>Own $518k</td>
</tr>
<tr>
<td>Mississauga</td>
<td>Own $473k Rent/Per Month $2,232</td>
<td>Own $534k</td>
<td>Own $1.2M</td>
</tr>
<tr>
<td>Oakville</td>
<td>Own $547k Rent/Per Month $2,134</td>
<td>Own $595k</td>
<td>Own $1.4M</td>
</tr>
<tr>
<td>Burlington</td>
<td>Own $602k Rent/Per Month $1,990</td>
<td>Own $578k</td>
<td>Own $1.1M</td>
</tr>
<tr>
<td>Toronto</td>
<td>Own $717k Rent/Per Month $2,731</td>
<td>Own $731k</td>
<td>Own $879k</td>
</tr>
</tbody>
</table>

Source: Zolo Real Estate Trends, June 15 – July 13, 2019

NOTES

- Due to the varying average rental costs for townhomes and detached homes in each city, there is no static amount for rental cost. The rental price varies depending on the neighbourhood, property, proximity to Lake Ontario, reno's, walk-score etc.

- The size, number of bedrooms/bathrooms are not the determining factor for rental costs.

Although Hamilton, does not offer the same amenities such as sufficient restaurants, entertainment, food and service options and niche fitness venues (i.e. spinning, yoga, kickboxing, pilates, etc.) within a quick walking distance for residents, which a city like Toronto has, more young people and families from the GTA are making the move due to the simple fact that Hamilton is more affordable.
DEMOGRAPHIC ANALYSIS

DEVELOPMENTS

NEW AND UPCOMING IN HAMILTON

2018 - PRESENT

Source: City of Hamilton

<table>
<thead>
<tr>
<th>2018 - PRESENT</th>
<th>Address</th>
<th>Project Name</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>179-191 James Street N</td>
<td>*Acclamation</td>
<td>71</td>
</tr>
<tr>
<td>2</td>
<td>20-22 George Street</td>
<td>20-22 George Street</td>
<td>230</td>
</tr>
<tr>
<td>3</td>
<td>46 James Street N</td>
<td>*William Thomas Student Rentals</td>
<td>159</td>
</tr>
<tr>
<td>4</td>
<td>112 King Street East</td>
<td>*Royal Connaught (Phase One)</td>
<td>122</td>
</tr>
<tr>
<td>5</td>
<td>112 King Street East</td>
<td>Royal Connaught (Phase Two)</td>
<td>76</td>
</tr>
<tr>
<td>6</td>
<td>121-125 King Street East</td>
<td>Gore Park Lofts</td>
<td>40</td>
</tr>
<tr>
<td>7</td>
<td>15 Cannon Street West</td>
<td>Jamesville Lofts</td>
<td>45</td>
</tr>
<tr>
<td>8</td>
<td>205-215 Cannon Street East</td>
<td>*220 Cannon Street East</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td></td>
<td>843</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2019</th>
<th>Address</th>
<th>Proposal</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Plan/Breaking Ground</td>
<td>43-51 King St W</td>
<td>LIUNA/Kresge</td>
<td>525</td>
</tr>
<tr>
<td>10</td>
<td>212 King William Street</td>
<td>KIWI Condos</td>
<td>266</td>
</tr>
<tr>
<td>11</td>
<td>225 John Street South</td>
<td>Corktown Plaza</td>
<td>792</td>
</tr>
<tr>
<td>12</td>
<td>271 Bay Street N</td>
<td>Tiffany Square</td>
<td>200</td>
</tr>
<tr>
<td>13</td>
<td>154 Main Street East/49 Walnut</td>
<td>Main &amp; Walnut</td>
<td>267</td>
</tr>
<tr>
<td>14</td>
<td>64 Main Street East</td>
<td>Pensio on Main</td>
<td>183</td>
</tr>
<tr>
<td>15</td>
<td>41 Stuart</td>
<td>Harbour Condos on the Bay</td>
<td>76</td>
</tr>
<tr>
<td>16</td>
<td>15 Queen Street South</td>
<td>Platinum Condominiums</td>
<td>120</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td></td>
<td>2,429</td>
</tr>
</tbody>
</table>

PROPOSALS

<table>
<thead>
<tr>
<th>Address</th>
<th>Proposal</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 108 James St N</td>
<td>Tivoli Condos</td>
<td>106</td>
</tr>
<tr>
<td>18 134 Cannon Street East</td>
<td>Beasley Park Lofts</td>
<td>65</td>
</tr>
<tr>
<td>19 165 Jackson Street West</td>
<td>Television City</td>
<td>618</td>
</tr>
<tr>
<td>20 71 Rebecca Street</td>
<td>Sonoma Homes</td>
<td>371</td>
</tr>
<tr>
<td>21 206 King Street West</td>
<td>Vernon Shaw</td>
<td>120</td>
</tr>
<tr>
<td>22 98 James St S</td>
<td>98 James Street South Condos</td>
<td>315</td>
</tr>
<tr>
<td>23 210 Main Street East</td>
<td>Former Days Inn</td>
<td>205</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>1,800</td>
</tr>
</tbody>
</table>

ON-SITE

<table>
<thead>
<tr>
<th>Address</th>
<th>Project</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pier 6-8</td>
<td>Waterfront Shores</td>
<td>1,293</td>
</tr>
</tbody>
</table>

There are currently 8 developments nearing completion in downtown Hamilton. All are within a 3 KM radius of West Harbour, totaling 843 new units. On-site, Waterfront Shores will have a total of 1,293 units. In the next 2-3 years there will be 8 more developments breaking ground, adding an additional 2,429 units by approximately 2022. Another 7 projects are pending approval.
The primary and most important of the target markets is the Hamilton residents. The goal is to create a destination on the waterfront, which would transform the city, promoting a positive image while at the same time creating a more vibrant downtown for residents, visitors and businesses alike. West Harbour will bolster the city’s identity and serve as an important catalyst for the revitalization of downtown Hamilton.

The goal is to draw from the 58,776 people living with a 3km radius of West Harbour, as well as the entire population of the City of Hamilton, including the areas of Ancaster, Dundas, Flamborough, Glanbrook and Stoney Creek.

Hamilton is made up of 570,654 people with an average household income of $95,605. 47.7% of the city’s population is between the ages of 20 and 54. 25.24% of the total population are children living at home under 24 years old.
There are 65,113 students within a 15 minute drive and 5 km radius of West Harbour. The most influential and dominant group of students is Generation Z (students ages 18-23). Gen Z’ers are the next generation influencing market trends. With current estimates at two billion globally (22.8% of the living population in Hamilton) this generation is slated to be the single largest group of consumers worldwide in just a few years.

MCMASTER UNIVERSITY
31,843 Students
Drive: 15 mins
Bike: 25 mins
Transit: 40 mins

MOHAWK COLLEGE
30,000 Students
Drive: 15 mins
Bike: 32 mins
Transit: 50 mins

REDEEMER UNIVERSITY
670 Students
Drive: 12 mins
Bike: 35 mins
Transit: 50 mins

TRIOS COLLEGE
300 Students
Drive: 15 mins
Bike: 15 mins
Transit: 17 mins

There are an additional 685,027 people within a 25 – 45 minute drive of West Harbour.

On average, 61% of the families in the surrounding neighbourhoods have children living at home (25 and under).

The dominant age group within the neighbourhoods is consistently 5-19, which means there are a lot of young families. Ages 25-34 and 35-44 follow behind.

Hamilton’s waterfront should be built for locals first, and will inevitably be enjoyed by visitors from nearby markets as well. The following is a summary of cities within a 25-45 minute drive of the site.
Hamilton has seen a major increase in the number of visitors to the city. Since 2015 this number has increased by a significant 200%. In 2018 all records were broken, with 4.5 million visitors and 22,000 hotel stays recorded, bringing in over $360 million in revenue to the city. The growth in visitors is linked to the success of the city hosting major, national events such as the Canadian Open, CANUSA Games, Canadian Country Music Award and the North American Indigenous Games. All of this has contributed to the growing recognition that Hamilton's identity is changing. Millennials are now the largest generation group in Hamilton, exceeding the provincial average of 26.84%. They represent 27.58% of Hamilton's population. As such they have been instrumental in driving a wave of change in the city, whose growth is now being touted as “the greatest urban comeback of all time”.

Placemaking will be key to creating a waterfront destination at West Harbour. If Hamilton is to continue to attract young people or in fact keep their own young people and sustain this current momentum, it will not only need to continue to draw from and build on existing events and capitalize on popular landmarks/tourists destinations (like waterfalls, and historical museums), but it will become critically important to create vibrant spaces, shared spaces, where the community meets and there is a social connectedness. The ability to be agile, flexible and embrace change will be what will ultimately determine Hamilton’s place and unique identity as a one-of-a-kind city.

### THE TOURISTS & EVENT GOERS

Hamilton has seen a major increase in the number of visitors to the city. Since 2015 this number has increased by a significant 200%. In 2018 all records were broken, with 4.5 million visitors and 22,000 hotel stays recorded, bringing in over $360 million in revenue to the city. The growth in visitors is linked to the success of the city hosting major, national events such as the Canadian Open, CANUSA Games, Canadian Country Music Award and the North American Indigenous Games. All of this has contributed to the growing recognition that Hamilton's identity is changing. Millennials are now the largest generation group in Hamilton, exceeding the provincial average of 26.84%. They represent 27.58% of Hamilton's population. As such they have been instrumental in driving a wave of change in the city, whose growth is now being touted as “the greatest urban comeback of all time”.

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### THE NEIGHBOURHOODS SURROUNDING MARKETS

Following, is the complete surrounding markets demographic analysis:

<table>
<thead>
<tr>
<th>CITY</th>
<th>APPROX. DRIVE TIME TO HAMILTON</th>
<th>POPULATION</th>
<th>AVERAGE HOUSEHOLD INCOME</th>
<th>DOMINANT AGE GROUP</th>
<th># OF CHILDREN LIVING AT HOME UNDER 24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milton</td>
<td>30-40 min</td>
<td>120,556</td>
<td>$133,692</td>
<td>5-19 (22%)</td>
<td>40,133 (33.3%)</td>
</tr>
<tr>
<td>Grimsby</td>
<td>25-40 min</td>
<td>27,975</td>
<td>$117,779</td>
<td>5-19 (16.9%)</td>
<td>7,333 (26.2%)</td>
</tr>
<tr>
<td>Brantford</td>
<td>28-40 min</td>
<td>103,062</td>
<td>$83,559</td>
<td>5-19 (17%)</td>
<td>27,182 (26.4%)</td>
</tr>
<tr>
<td>Cambridge</td>
<td>30 - 40 min</td>
<td>135,656</td>
<td>$99,929</td>
<td>5-19 (17.8%)</td>
<td>34,115 (25.1%)</td>
</tr>
<tr>
<td>Lincoln</td>
<td>35-45 min</td>
<td>24,431</td>
<td>$105,968</td>
<td>5-19 (16.7%)</td>
<td>7,591 (31%)</td>
</tr>
<tr>
<td>Guelph</td>
<td>30 - 45 min</td>
<td>137,187</td>
<td>$102,383</td>
<td>5-19 (16.5%)</td>
<td>33,819 (24.7%)</td>
</tr>
<tr>
<td>St.Catherines</td>
<td>30 - 40 min</td>
<td>136,160</td>
<td>$84,250</td>
<td>5-19 (14.4%)</td>
<td>34,545 (25.4%)</td>
</tr>
<tr>
<td>Burlington</td>
<td>15 – 20 min</td>
<td>197,683</td>
<td>$128,372</td>
<td>5-19 (16.1%)</td>
<td>50,343 (25.5%)</td>
</tr>
</tbody>
</table>

Note: The communities of Milton, Brantford, Cambridge, Guelph and St. Catharines are significant communities within a 30-45 minute drive of Hamilton with an important population of young families to draw from.
THE TOURISTS & EVENT GOERS

EXISTING EVENTS
Currently there are 40 events planned for the waterfront in 2019 with an estimated 92,000+ attendees. These events include Canada Day celebrations (estimated 30,000 people), the Santa Clause Parade (estimated 50,000 people) as well as walks, marathons, festivals like Yoga Fest, Beer Festival and Dragon Boat Race Festival.

ADDITIONAL POPULAR TOURIST DESTINATIONS AND EVENTS IN HAMILTON:

- Sporting Events
  - Hamilton Tiger Cats (Football) and Forge FC (Soccer)
- Waterfalls
  - Albion Falls, Smokey Hollow Falls, Falkner’s Falls, Webster Falls etc.
- First Ontario Centre
- Year-round events like concerts and entertainment
- Art Gallery of Hamilton
- Ghost Tours
- Hamilton Fashion Week
- Gage Park
- Royal Botanical Gardens
- HMCS Haida National Historic Site
- Canadian Warplane Heritage Museum
- Hamilton Museum of Steam & Technology
- Rocktown World Fair
- Franco Fest
- Art Festivals - Liquid Art Fest, Arts Fest, Art Crawls and SuperCrawl
- Because Beer Craft Festival

WATERFRONT SHUTTLE
The Waterfront shuttle route runs during the summer months providing free service, seven days a week, from Gore Park in the downtown core of the city to the waterfront. Total ridership from June 24 to September 1st 2018 was 27,700. This is additional evidence that there is interest in the waterfront and by creating a destination which is animated all year round.
Location - Proximity to major highways (QEW and 403) as well as to Toronto.

Point of arrival at the waterfront.

Public transportation is accessible (GO Train and bus).

Hamilton’s population is expected to grow 5.3% over the next 5 years with the largest increase in the 25-44 year age category. This is an important demographic which would include young millennials, single or with families who will spend on leisure, recreation and entertainment.

If you include the Metropolitan area of Hamilton (Burlington and Grimsby) the total population is significant at 747,545, making it the third largest metropolitan area in Ontario.

Diversity in ethnicity (25% of the population is born outside of Canada).

Cheaper, more affordable housing.

Vibrant arts, culture and foodie scene which is appealing not only to young people but other generation groups as well.

Extensive waterfront as a scenic backdrop.

Small town pace but with a unique urban vibe.

Ranked #3 in “Ontario’s Top 10 Cities for Real Estate Investment” by Real Estate Investment Network Ltd. after Ottawa and Kitchener-Waterloo-Cambridge.

The city is already transforming into one where new jobs are being generated mostly in the tech, health and arts sectors. These sectors are becoming much more prominent industries in Hamilton.

Growth in tourism - In 2018 all records were broken, with 4.5 million visitors and 22,000 hotel stays recorded, bringing in over $360 million in revenue to the city of Hamilton.

Most importantly there is an awareness and recognition by the city and stakeholders that the right initiatives, alliances and partnerships with the community are key to continuing this revitalization.
A lingering negative perception of hate crime in Hamilton, which has been further perpetuated by negative press such as the December 2018 Macleans article, which cited Hamilton as having the third highest rate of hate crime in the country. Another example is the riots that took place on March 3rd, 2018 as reported by CBC and several other media outlets, including the Hamilton Spectator.

A sense of insecurity by some entrenched Hamiltonians who oppose the influx of city people and are afraid of increased housing/rental costs.

Negative perception by some that downtown is not safe.

Difficulty in getting to the site - Currently there is minimal public transportation directly to West Harbour, with the exception of the shuttle in the summer and the #20 (A-line) which operates only on weekdays until 7 p.m. and stops right in front of the HWT Centre. There is also the #4 (Bayfront) that is 7 days a week, year round, 5am-2am, that stops at James St. N. and Burlington St.

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West Harbour, given its location has a unique opportunity to set the tone for the future of the site and also the future of downtown Hamilton.

The location provides opportunities to integrate the community and to celebrate arts and culture through temporary and permanent installations, thereby inviting social gatherings, physical activity and opportunities to animate the site all day, all week and all year long.

Provides an opportunity to involve locals and encourage community participation, which would promote a healthier and safer community.

Capitalize on site density once Waterfront Shores development is completed.

Presents an opportunity for placemaking initiatives and to expand events that are already popular and taking place around the city i.e. Art Crawl, Super Crawl, Hamilton Fashion Week, Liquid Arts Fest, Because Beer Craft Festival, Winterfest, Canada Day etc.

Traffic congestion and lack of parking which are two issues that local businesses complain about, if not corrected will be a deterrent for those who are driving into downtown to come downtown.

If unchecked, escalating residential rents and real estate prices could ultimately be a deterrent for young people looking to move to Hamilton from outside areas like Toronto.
To provide a qualitative assessment of the market, we spoke to a spectrum of people in downtown Hamilton including business operators, employees and customers.

**WE ASKED THE FOLLOWING QUESTIONS IN NO PARTICULAR ORDER:**

a. What is your general feedback from consumers as a front-line employee working in Hamilton?

b. What is your personal view of Hamilton, in terms of what it does well and what it needs to improve upon?

c. If you were to visit, live or work on the Waterfront - what would you deem critical to its success?

d. What do you feel the city of Hamilton could improve upon - from an infrastructure and community societal standpoint?

**THE OVERWHELMING RESPONSE WAS AS FOLLOWS:**

- Lack of parking was the most common concern among all local businesses. More than one person said they leave 20-30 minutes earlier just so that they can find parking. Others said that lack of parking is what makes downtown Hamilton an unpopular choice when it comes to dining out.

- In terms of Hamilton’s infrastructure, focusing on creating more efficient parking for both the locals that commute, as well as visitors who travel from the surrounding cities and towns, was a point voiced by several business owners and operators.

- Traffic congestion is said to be an issue and particularly during peak times (between 3 pm and 7 pm).

- The ongoing construction on Locke Street was mentioned several times, with one business owner saying that it has resulted in less visits by customers from towns outside of Hamilton such as Burlington, Oakville and even some neighbouring communities within Hamilton, like Stoney Creek and Ancaster.
RESPONSES CONTINUED...

- According to several business owners, although they understand that Hamilton is a diverse community, the reputation of downtown carries a somewhat negative connotation when it comes to those with lower incomes and ongoing issues with homeless and vagrant people downtown. Their comments were that this acts as a deterrent for people from outside areas to visit Hamilton, even though this does not reflect the downtown community as a whole.

- Types of unique tenants vary. As an example, vegan restaurants have a strong and loyal following, but the comments were that vegan food fare has not quite hit the mainstream food and beverage scene to the extent that it has in Toronto. But the consensus is that Hamilton’s food scene is evolving with the rise of young, hip local restaurants downtown, driven mostly by the influx of young Torontonians in search of affordable real estate. Independent operators downtown Hamilton have fuelled a vibrant food scene, creating compelling dining experiences.

- Public space along the waterfront was emphasized by local businesses as a priority for the community, as this will attract more visitors and increase the demand for new business.

- There was an overwhelming desire for more green space, gardens, parks and walking and biking paths along the waterfront and downtown Hamilton.

- Numerous public parks, art venues and educational institutions (e.g., McMaster University and Mohawk College) are contributing to Hamilton’s evolution (from Steel Town). There is a growing perception that it is becoming an epicenter for creativity.

- The overarching view is that more culinary offerings, retail and service uses will encourage city-dwellers to try out new restaurants, cafes, and microbreweries in the downtown-core and along the waterfront.
SECTION B
THEMATIC CLUSTERING STRATEGY

1. Best Fit Strategies
   a. Retail Vision
   b. Place-making Initiatives
   c. Connectivity
   d. Design, Arts and Culture

2. Aspirational Strategies
   a. Beauliegh Portfolio
   b. Global Inspiration and Examples
BEST FIT STRATEGIES

RETAIL VISION
THAT BEST MATCHES THE CURRENT AND PROJECTED CONSUMER PROFILES

- Curate a mix of restaurants and destination uses that cater to both local and tourist markets.
- Destination retail with a focus on multi-purpose spaces. For example, concepts where a café is combined with a bike retail and rental outlet.
- Restaurant space integrating an events or co-working space. This will ensure animation and activity during the week and on weekends as well. This will also allow for maximum use of the space, maximizing income and generating traffic on the site at various times.
- Celebrate the water with specific compatible uses with orientation of retail to the waterfront. Incorporate patio areas, events and public spaces into the retail. Some examples are canoeing and kayaking rentals, as well as fitness studios with outdoor areas for yoga classes and bootcamps activating the public areas in the warmer summer months.
- Maintain flexibility in retail, profiling different uses at different times, taking into account the seasonality of the project.
- Incubate strong local brands, embracing and celebrating the local Hamilton identity to foster immediate interest in the project.
- Partner with progressive forward-thinking national tenants, where possible to create synergy in the project.
- Incorporate local art and music into the retail to encourage community participation and pride.
- Activate the public realm to create a sense of place, where retail is seamlessly integrated into the public spaces through outdoor patio areas and gardens.
RETAIL VISION

THE SUCCESS FOR PIERS 6-8 LIES IN PLACE-MAKING INITIATIVES, CONNECTIVITY, DESIGN, ARTS AND CULTURE

BEST FIT STRATEGIES

RETAIL VISION

PLACE-MAKING INITIATIVES

- Animating the public realm with landscaping and gardens, creating an interesting backdrop for photo opportunities for events (weddings), or become a destination of interest where Instagrammable moments are captured. Some examples include tulip or cherry blossom gardens in the spring and sunflower gardens in the summer, which would attract locals, visitors from surrounding communities, and tourists.

- Permanent installations which serve as a major recreational amenity for the area and encourage outdoor social gatherings, fostering a sense of community and creating a destination, which is locally relevant, and nationally acclaimed. One where sensations and experiences intersect.

- Creating and curating events and programming which are unique to Hamilton’s fabric, by celebrating the city and its people.

- Explore options for a ferry boat which would take tourists between Oakville, Burlington and Hamilton as an example. Explore the option of improving and enhancing the existing Dinner Cruise Boat that operates out of Pier 8, with the possibility of integrating into the restaurant experience proposed for the site.

- Maximize opportunities for continuous public access to the Waterfront, not only by car but more importantly, by boat, bike and foot.

- Emphasize physical activity and group participation - i.e. volleyball or rollerblading,

Examples can be found in Section C of this report under Waterfront Marketing Tactics: Placemaking, Animating Spaces and Programming.
Exploring opportunities to create seamless connections and walkability between all areas and Piers. The site must be considered holistically as one continuous experience in order to be successful. Access from one area to the other must be made easy.

Connecting the buildings at West Harbour is of paramount importance. Connectivity enabling easy access from downtown is a must. Shuttle service from the GO train should be explored. Physical connections which will enhance and facilitate easy access to the waterfront.

Easily identifiable entrances to access the site.

Incorporating activities which will link all destinations successfully. It is the sum of all parts which will ultimately ensure the success of the waterfront as a whole, allowing the attraction of one to create interest in the others.

Public spaces and place-making opportunities will be the glue that binds all areas, adding to the vibrancy of the project.

Finding unique ways to tap into local talent in the community. An example would be the initiative taken by the Collective Arts group with the mural outside their brewery.

Flexible design, which encourages adaptability in the use of the space, depending on the time of day or season. This is integral to the success of any retail or commercial space, and more specifically at Piers 6-8. As the site densifies, the use must be able to transition and transform into something more appropriate for the residents and community.

Arts, culture and the local community are key drivers of traffic. The local identity should be showcased and celebrated in the design to stimulate interest and create a sense of place i.e. celebrating Hamilton’s history as a “Steel City”. Frequent opportunities to profile celebrated local residents and artists, whether through music or theatre will help promote community and create a sense of pride and ownership for the Waterfront and the local community.
Queen’s Quay Terminal is an iconic landmark mixed-use property on Toronto’s waterfront. For decades the award-winning architecture that defined Queen’s Quay Terminal plagued the retail. The brutalist structure had turned its back to the water and there was no connection between the retail and the bustling tourist traffic on the waterfront. There was also limited opportunities to profile and position the retail with visibility to the water. The retail was a mixed bag of service, food and fashion with no particular focus.

The challenge Beauleigh faced was to overcome the negative perception of years of failed retail and mediocre restaurants. The goal was to revitalize the retail component and to curate a mix which would be appealing to an increasingly younger demographic. The vision was to create a hive of activity along the lakefront with beautiful and activated patios. In essence, creating seamless communication between the interior and exterior. Queen’s Quay Terminal had to become a compelling destination on the waterfront for more than just the office workers resident in the building or the tourist crowds in the summer. It had to become a place where people from the community could come together, relax, spend some time with family and friends and enjoy the waterfront, the food and vibe and create memories. The result was the careful curation of an eclectic mix of independently operated restaurant concepts, created by
seasoned Toronto restauranteurs, along with some unique service retail. Coupled with creative design by working with a creative design team. This re-merchandising initiative has revitalized the retail at Queens Quay, which now not only attracts the residents, office workers, people from the surrounding GTA and the two million tourists that visit Toronto’s waterfront every year, but also those working in the financial core and the event-goers to the Scotiabank Arena and Rogers Centre, creating a true waterfront destination. The operators are able to capitalize on traffic and maximize sales in the summer months, while establishing a local following in the neighbourhood residents and office workers, which sustains them during the tougher winter months.

The retail strategy was carefully executed focusing on selecting the “right tenant mix”, unique to the waterfront. Restaurants were selected based on their ability to deliver an optimum food and beverage mix, with accessible price points. They also had to have the right design and vibe to successfully address and cater to the various market segments.

Sun Life Financial Centre is a 1 million square foot office complex with approximately 40,000 sf of retail space, strategically located in the heart of downtown Ottawa. In December of 2018, the prominence of Sun Life Financial Centre was elevated with the opening of Queen St. Fare, Ottawa’s first food hall in the financial district.

Working with Sun Life Financial and Bentall Kennedy, (management team at Sun Life), Beauleigh conceptualized the vision for the food hall and outlined the retail strategy, carefully selecting an eclectic tenant roster which profiled some of the best food operators in the city. The space had previously been occupied by a Hy’s Steakhouse, which was old and dated and was not appealing to a younger employment base, which was being fuelled by a booming technology industry and the launch of a light-rail transit system.

The 9,000 square foot food hall, complete with a stage for live music and DJ, has helped spark the area’s nightlife and weekends, with a full complement of offerings, addressing all market segments. It has a licencing capacity for 390 people, which transitions into cocktail hour after 5 pm and into the night and themed brunches on the weekends are a hit as well. Queen St. Fare has been a driving force in transforming Ottawa’s financial core.
Beauleigh created the retail vision and merchandising plan for Union Station, working collaboratively with the owner, architects and designers in planning the layout and configuration for the 170,000 square feet of new retail. Beauleigh then carefully curated the roster of tenants and developed the marketing strategy for the execution of the plan. 

Respecting the heritage and location of Union Station within its marketplace, Beauleigh created a merchandising strategy with a focus on targeting the best operators in the city, embracing and celebrating the cultural diversity and entrepreneurial spirit of the city, and bringing the best of Toronto to the station. So for those that only read about the newest, coolest independent restaurants or retail in the city, they would have a chance to experience them first hand at Union Station.

The focus was to be able to attract various segments of the market to the station. Not just the commuters, but the residents in the surrounding residential towers, the office workers in the financial core, the event-goers and the tourists. The result - Union Station has been recognized for two years in a row by Monocle, a renowned international global affairs and lifestyle magazine, as one of the top 50 travel destinations for 2019 and 2020. Scheduled completion for the entire station is slated for Fall, 2020.

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**ASPIRATIONAL STRATEGIES**

**TRUE NORTH SQUARE**

**WINNIPEG**

True North Square is a brand new mixed-use office, retail and residential development in downtown Winnipeg. Connected to the MTS Centre, home of the Winnipeg Jets, it was the goal of the owners of True North Square to redefine the heart of the city, Downtown Winnipeg had never been known to be a place where people who worked would want to stay after 5 pm.

The goal was to change the perception of downtown Winnipeg, moving away from the cookie cutter chains that proliferated downtown Winnipeg, and instead focus the retail on the best, independent local operators in the city, providing them with a platform to showcase their talents to the local community and also to visitors to the city, who would be going to the MTS Centre for a concert, event or game. Beaulieuh conceptualized the vision, then worked with the team at True North and their architects and designers to develop the plan and layout for the project.

The result was a curated 17,000 square foot food hall on the 2nd level, a roster of cool, independent retail operators which includes a third wave coffee shop, partnered with a well-known barber in the city, a local urban format grocery concept specializing in fresh grab and go items, a liquor store, and other service retail. The retail faces a large public square, which is landscaped with benches and patios where people can hang out. It is also directly connected to Winnipeg’s 2 km of Walkway System, a network of pedestrian skylways and tunnels, connecting True North Square to the rest of the downtown core.

The food hall is scheduled to open late summer of 2019.

**GLOBAL EXAMPLES**

**WATERFRONT COMMUNITIES**

**REFSHALEØEN ISLAND**

**COPENHAGEN**

(Former shipyard Burmeister and Wain)

What was once home to one of the world’s largest shipyards, is now being transformed into the ultimate urban destination 15 minutes from Copenhagen’s city centre. The revamped historical and industrial island is now known as Refshaleøen Island, is home to multiple concept driven restaurants, a food hall, creative office spaces, adult playgrounds, sport complexes and music festivals. Urban exploring at Refshaleøen includes:

- **Copenhagen** - Sitting atop the city's new water-to-energy incinerator, Copenhagen (Amager Bakke in Danish) will be one of the world's largest artificial ski slopes. The 180-meter facility, designed by Bjarke Ingels, will also feature the world’s tallest artificial climbing range. Ski-lifts will take you to the very top where there will be sweeping views of the city and the sea.

- **Raffen Food Hall** - 107,6395 sf indoor/outdoor food hall with a total 54 units including food, workshops and bars.

- **Alchemist** - A 50-course menu, five dining rooms, art installations and a research lab set the stage for Alchemist–Rasmus Munk’s restaurant, which is set to open in Summer 2019. By merging theatre, art, chemistry and gastronomy in a massive industrial warehouse on Refshaleøen, he explores new fine dining-territory.

- **Urban Ranger Camp** - An adult only playground where you can experience the rush of walking on ropes and ladders at a height of 50 meters.


- **Bungee Jumping, Rock Climbing and Paintball**

Source: “What to see and do in Copenhagen's Refshaleøen” VisitCopenhagen.
Source: refshaleoen.dk
ASPIRATIONAL STRATEGIES

GLOBAL EXAMPLES

WATERFRONT COMMUNITIES

TIME OUT MARKET

LISBON, PORTUGAL

Time Out Market opening in 2014 is a curated food hall from Michelin stars to the city’s best kept secrets on Lisbon’s waterfront.

Time Out is one of the most popular attractions in Portugal’s capital for both locals and tourists alike with over 3.6 million visitors a year.

The food hall also has programming throughout the year from pop concerts to art exhibitions, from cooking master classes to business summits.

Time Out Market recently opened new locations in New York, Boston, and Miami. More locations are set to open in late 2019 in Montreal, and Chicago.

Source: Time Out Market Lisbon

Photo Credits: Left: Time Out Market, Top Right: Time Out Lisbon, Middle Right: Time Out Market (YouTube), Bottom Right: Time Out Lisbon

GLOBAL EXAMPLES

WATERFRONT COMMUNITIES

DOMINO SUGAR FACTORY

WILLIAMSBURG, NEW YORK

(Former Sugar Factory, which was built in the 1880s and was formerly the largest sugar refinery in the world)

A public park on the waterfront site around the former Domino Sugar Factory in Brooklyn, features stadium seating, a sunbathing spot, an industrial-style playground and a restaurant (Tacocina). Tacocina is a big part of the project, as it’s the only place to sit by the water, eat, drink and overlook the views of the Manhattan skyline and Williamsburg Bridge.

Beyond the tacos and drinks, one of Tacocina’s main attractions is the view. “The biggest thing that excites me about Tacocina is where it is,” – Danny Meyer, CEO, Union Square Hospitality Group.

Source: Eater, 2018

Photo Credit: Daniel Levin

Source: Time Out Market Lisboa

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ASPIRATIONAL STRATEGIES

GLOBAL EXAMPLES

WATERFRONT COMMUNITIES

HUNTERS POINT SOUTH
LONG ISLAND, NEW YORK

An abandoned industrial waterfront site in Long Island has been revitalized and transformed into an 11-acre riverfront park completely accessible with bike paths and walkways. The park includes a children’s playground, basketball courts, dog run, fitness terraces with exercise equipment and a multipurpose play field, as well as an urban beach with a spot for launching kayaks.

The development overlooks the East River and Manhattan skyline which can be enjoyed by large elevated decks and sweeping shade canopies. What is lacking at the massive park is the F&B options with only one café on site leaving residents and tourists alike with no options. Residents have complained though the park is impressive and the place to be, the food is mediocre and overpriced.

Under construction is the rest of the planned revitalization which will include up to 5,000 new housing units, 60% targeted to middle-income families which will also include 100,000 square feet of retail, 50,000 square feet of community space and two schools. Plans for retail have not been announced, but the focus will be on local operators.

GLOBAL EXAMPLES

WATERFRONT COMMUNITIES

BATTERY PARK
CAPE TOWN, SOUTH AFRICA
(Former fortification, built in 1784 by the Dutch settlers. Than a prison built in 1827 by the British)

129,166 SF

Battery Park, a 12,000 square metre urban park, located in the V & A Waterfront district of Cape Town, South Africa.

An old coastal fortification in Cape Town has been transformed into an urban park that includes a basketball court, skate park, stand-up paddling, swimming and kayaking facilities in the waterway, swings, jungle gyms and barbecue, facilities.

Battery Park is accessed via a number of pedestrian routes, and is well connected to various streets. It is also on the waterways, on which water taxis transport visitors. These waterways connect the V&A Waterfront to the Cape Town International Convention Centre (CTICC). Under Battery Park, there is a parking garage that can accommodate 1,200 cars.
ASPIRATIONAL STRATEGIES

GLOBAL EXAMPLES

WATERFRONT COMMUNITIES

CHICAGO RIVERWALK

CHICAGO, ILLINOIS

What was once a shipping channel and a neglected downtown riverfront, is now a destination in the city of Chicago. Completed in 2016, the initiative to reclaim the Chicago River for the ecological, recreational and economic benefit of the city was met. The vision for Chicago’s riverfront was to break up the blocks (rooms) along the river into 6 sections each with a different design and program of a different river-based typology. These blocks include:

The Marina Plaza: Restaurants and outdoor seating provide views of vibrant life on the water, including passing barges, patrols, water taxis, and sightseeing boats.

The Cove: Kayak rentals and docking for human-powered crafts provide physical connections to the water through recreation.

The River Theater: A sculptural staircase linking Upper Wacker and the Riverwalk offers pedestrian connectivity to the water’s edge and seating, while trees provide greenery and shade.

The Water Plaza: A water feature offers an opportunity for children and families to engage with water at the river’s edge.

The Jetty: A series of piers and floating wetland gardens offer an interactive learning environment about the ecology of the river, including opportunities for fishing and identifying native plants.

The Riverbank: An accessible walkway and new marine edge create continuous access to Lake Street and sets the scene for future development in this critical space at the confluence.

PARIS PLAGES

PARIS, FRANCE

Temporary transformation (July/August) on an Expressway along the canal in the centre of Paris into an urban beach vacation.

The artificial beaches are an effort to reclaim the riverfront from overcrowded, busy traffic streets to attract locals who would typically seek refuge from the summer heat on France’s coast, and offer those who can’t afford an expensive getaway the chance to relax for free.

Expanding 2 miles from the Notre Dame Cathedral, the street is transformed into a series of beaches, complete with sand, palm trees, umbrellas, lounge chairs, a pop-up library, and a range of recreational activities such as swimming pools suspended over the Seine, kayak stations, free evening concerts, and dancing.

This ties into the placemaking and animating the public realm. By animating and transforming the canal seasonally, it creates a gathering place for the locals in the summer.

Creating a temporary unique destination with programming and events in an unexpected place, encourages and excites the community as well as brings in and attracts more people to the site.

Ultimately, acting as a backdrop, enhancing placemaking and adding value to the other amenities.
SECTION C
EXECUTION STRATEGY

1. Tenant Profiles
2. Proforma - Potential Achievable Rents
3. Premises Configurations/Design Analysis
4. Retail Phase-in Strategy
5. Waterfront Marketing Tactics
## TENANT PROFILES

## RECOMMENDED USES FOR PIERS 6-8

<table>
<thead>
<tr>
<th>TENANT PROFILES</th>
<th>RECOMMENDED USES FOR PIERS 6-8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Service Restaurants</td>
<td>Full dining experience with unique patio presence on the waterfront</td>
</tr>
<tr>
<td>Quick Service Restaurants</td>
<td>Smaller floor plates, more grab-n-go driven</td>
</tr>
<tr>
<td>Café</td>
<td>Neighbourhood hangout spot i.e. with bike and/or skateboard shop and/or canoe/kayak rentals</td>
</tr>
<tr>
<td>Service/Fitness Retail</td>
<td>Niche gyms i.e. yoga, boot camp classes, rowing club etc. while also integrating live classes in the public realm to promote health and fitness in the community, as well as enhance the presence of operators and Piers 6-8</td>
</tr>
<tr>
<td>Public Realm</td>
<td>Activating public space as a draw to potential visitors with temporary uses which allow flexibility and the option to transition seasonally i.e. temporary farmer's market, community gardens, seasonal installation of basketball courts, volleyball courts and/or skate parks in public spaces</td>
</tr>
<tr>
<td>Tourist Attraction</td>
<td>Create a must-see destination with experiential and interactive installations fostering positive and memorable experiences. i.e. landscaped beach, water sport rental, gardens, swings (ties into waterfront marketing tactics)</td>
</tr>
<tr>
<td>Co-Working &amp; Event Space</td>
<td>Creating a vibrant space that transforms from day to night and can be used for events</td>
</tr>
</tbody>
</table>
TENANT PROFILES

FULL SERVICE RESTAURANT

MOODBOARD

Full dining experience with unique patio presence on the waterfront.

Photo Credits - Top Left: Cosmin Dragomir, Bottom Left: Yuki To, Middle Right: Blacksheep - Kate Berry, Bottom Right: B Seated Global

QUICK SERVICE RESTAURANT

MOODBOARD

Smaller floor plates, more grab-n-go driven.

Photo Credits - Top Left: Focal Interior Photography, Bottom Left: Boulom, Top Right: ATO Studio, Bottom Right: Christian Harder
CAFE + BIKE SHOP

MOODBOARD

Neighbourhood hangout spot.

CO-WORKING SPACES

MOODBOARD

Creating a vibrant space that transforms from day to night and can be used for events.
**SERVICES / FITNESS RETAIL**

**MOODBOARD**

Niche gyms including yoga, boot camp classes and rowing club.

---

**TOURIST ATTRACTION**

**MOODBOARD**

Create a must-see destination with experiential and interactive installations fostering positive and memorable experiences.

Photo Credits - Top Left: Eloy Rodriguez, Top Right: Beauleigh, Bottom Right: KLOOK
PUBLIC REALM

MOODBOARD

Activating public space as a draw to potential visitors.
POTENTIAL ACHIEVABLE RENTS

All rent will depend on timeline for completion of construction on the site, density on the site and occupancy for the residential.

All rent will be impacted by seasonality and density on the site. Unless and until regular events are scheduled and programmed, and there is both day and night time density and traffic and infrastructure for public transportation is improved, market rents will have to be determined using a Gross Rent Occupancy Cost analysis i.e. rent as a % of sales.

EXAMPLE

Projected sales: $1M per annum
Sustainable Gross Occupancy Cost as a % of Gross Sales: 10%
Expected Gross Rent: $100,000/annum
Size of Space: 4500 SF
Gross Rent Per Square Foot: $22.22 (includes TMI)

Recommended Gross Occupancy Costs based on use:

**Full Service Restaurants** 8 to 10% of Gross Sales

**Quick Service Restaurants** 10 to 12% of Gross sales

**Café** 12 to 14% of Gross sales

**Co-Working & Event Space**

Subject to percentage of the space which could be considered retail and restaurant and percentage allocated for events or co-working space. Gross rent will be based on a flat monthly rate for the first 3 years of the term and at least until there is sufficient density on the site to support the retail operation.

**Build Out**

Tenants to be responsible for full build out. However there will need to be a significant contribution required from the Landlord to build out the space. Landlord cost will vary depending on the use and infrastructure required and could range from $150 - $300 psf.

Ultimately the recommended structure will attract the right uses and tenants to create a one-of-a-kind destination for the city and surrounding areas. This will ultimately ensure the success and sustainability of the concept as the site develops.
At a combined 25,563 SF of retail (Block 9.1 is 11,362 SF and Block 9.3 14,201 SF) the space will need to be leased as a multi-purpose concept, whether single or multiple leases.

There would not be enough sales generated by a single use to be sustainable long term, especially given the seasonality of this location. Winters could be very tough on the waterfront particularly during the months from December to March, even with activation and events.

An example is Queens Quay Terminal in Toronto, which has much higher density on the site and 2 million tourists annually, however even with this, winters are tough to overcome.

Retail must be partnered with an experiential and interactive component. As an example simply having a bike store selling bikes will not work. However, if partnered with spinning classes, bike rentals, and a bike shop (for bike repairs), the multi-faceted nature of the concept ensures its appeal to a wider audience and creates repeat visits by customers to the site.

If the concept is a boot camp or yoga classes, an outdoor component where boot camps or yoga classes can be conducted during the warmer months could create an added benefit and drive more traffic and sales, while at the same time creating animation on the site.
The retail that is being programmed at Waterfront Shores (Pier 8) of approximately 70,000 SF must tie into the retail at West Harbour and the uses must be complementary and not competitive. For example, having 2 or 3 coffee shops on the site because they’re easiest to lease will be detrimental to the site. What comes first in terms of the retail development is critical and will set the tone for the rest of the site.

If there are multiple owners/landlords throughout the development, there has to be coordination and collaboration between the various stakeholders in terms of appropriate uses and concepts and timing for the release of the retail. The success of any retail is dependent on multiple factors i.e. density on the site, ability to draw from outside the site (not solely reliant on the on-site density), addressing seasonality and ability to attract customers during the harsh winter months.

Whatever concept(s) or use(s) is launched first must be a platform for identifying what is to come. It must create excitement for the community at large to be engaged. If there is not sufficient density on the site to ensure success of the food or retail concept, then flexibility and adaptability must be built into the design to ensure that the retail space can be transformed into a different venue and use which will be right for its time.

**FLEXIBLE DESIGN FOSTERS ADAPTABILITY.**

**WATERFRONT SHORES RENDERING**

All Premises are to be delivered in a shell condition and all services are to be brought to the space.

<table>
<thead>
<tr>
<th><strong>Full Service Restaurants</strong> Approx. 3,000 - 5,000 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Positioned facing the water</td>
</tr>
<tr>
<td>• Patio is a requirement with waterfront facing views</td>
</tr>
<tr>
<td>• Kitchen exhaust and gas required</td>
</tr>
<tr>
<td>• 12-14 ft ceilings</td>
</tr>
<tr>
<td>• Storefront to be fully glazed with ability to open up onto the water front for enhanced sight lines and views and to create seamless connection between the retail and the waterfront.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Quick Service Restaurants</strong> Approx. 1,000 - 1,500 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 12-14 ft ceiling heights (clear)</td>
</tr>
<tr>
<td>• Kitchen exhaust requirement</td>
</tr>
<tr>
<td>• Good visibility and frontage (storefront) required with street access as well</td>
</tr>
<tr>
<td>• Outdoor patio(s) is a requirement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Café &amp; Bike Shop</strong> Approx. 800 - 1,200 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Should be positioned near bike path to give optimum exposure and visibility to the bike path in order to capitalize on traffic from bike path with connectivity to the street</td>
</tr>
<tr>
<td>• Accessibility from the street for daytime traffic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Service / Fitness Retail</strong> Approx. 1,500 - 3,000 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Must have street front access with outdoor area to conduct boot-camps and yoga classes to create vibrancy and animation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Public Realm</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Retail and public realm areas must be integrated into the rest of the site with seamless connectivity to all areas.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Co-Working &amp; Event Space</strong> Approx. 3,000 - 5,000 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Should have street front access and waterfront exposure</td>
</tr>
<tr>
<td>• Infrastructure required for such space: exhaust/ecologizer units, gas, electrical, water, storage areas for patio furniture (event space may require specific patio furniture)</td>
</tr>
<tr>
<td>• Must have outdoor patio</td>
</tr>
</tbody>
</table>
RETAIL PHASE-IN STRATEGY

PHASING

Spaces must be built with flexibility, keeping in mind that the site will evolve and transform in its first 8 - 10 years as new blocks are brought online. Phasing of the development must be incorporated into the overall strategy for the retail, as this affects on-site population and density, types of uses/concepts, which in turn affects traffic for the retail and overall programming for the site.

This building (Block 9) has to function as a launching pad for the project, setting the tone for the entire site. There must be synergy throughout the site, including Piers 6-8 which will not be sustainable without the rest of the development.

There has to be a holistic vision of the site, with connectivity and walkable areas throughout the site. Each area must strengthen the other. Access by boat, foot or bike (other than by car), is critically important and must be a priority.
WATERFRONT MARKETING TACTICS

PLACEMAKING, ANIMATING
SPACES & PROGRAMMING

It is crucial to be able to animate the waterfront and tap into events and programming so that the community is engaged as well.

Stadium Seating
Unique Seating Options
Picnic Seating
Markets
Pop-Ups
Shipping Containers
Chef Cook Off
Food Festivals
Art Installations
Fashion Week
Music Festivals
Performance Stage
Celebration Square
Landmarks
Skating Rink
Ski & Snowboard Slopes
Sports Park
Marathons
Fitness Classes
Flower Gardens
Event Space
Water Fountains
Boating Rentals
Fireworks
Holiday Markets
Ferry Services & Cruise Boats
Experiential
STADIUM SEATING

Animate the public realm with tiered stadium seating.

Unique seating options for people to enjoy and interact with.
WATERFRONT MARKETING TACTICS

PICNIC SEATING

Areas for people to get together with friends and have a picnic.

MARKETS

Seasonal Farmers Markets.
WATERFRONT MARKETING TACTICS

POP-UPS

Temporary retail pop-ups for brand activations.

SHIPPING CONTAINERS POP-UPS

Temporary shipping containers for pop-up opportunities.

Photo Credits - Top Left: Darling's Fashion Truck (Facebook), Bottom Left: Addicted to Retail, Top Right: Astound Group, Bottom Right: PopUp Republic.
CHEF COOK-OFF

Local and/or celebrity chef cook-offs for entertainment and events i.e. charity events and giving back to the community.

Celebrating local and cultural food with the community.

FOOD FESTIVALS

FOOD FESTIVALS

Celebrating local and cultural food with the community.
WATERFRONT MARKETING TACTICS

ART INSTALLATIONS

Temporary art installations creating interactive experiences.

FASHION WEEK

Host Hamilton Fashion Week events both inside and outside.
MUSIC FESTIVALS

Venue for both local and international artists.

PERFORMANCE STAGE

Outdoor stage for concerts, shows and performance.

Temporary Stage, that can be easily set up and taken down with on-site storage for tables, chairs etc.

Opportunities to celebrate local art and music as well as embrace local identity and history.
**CELEBRATION SQUARE**

A community gathering place for special occasions and events i.e. sporting events.

**LANDMARKS**

Landmarks creating placemaking opportunities for the community to enjoy.
SKATING RINKS

All season skating rink operating year round.

SKI & SNOWBOARD SLOPES

Outdoor artificial slopes for all seasons, as well as indoor real snow slopes.

Photo Credits - Top Left: Gear Junkie, Bottom Left: Ross Woodhall, Top Right: Notable Life, Bottom Right: Alexea Hopkins.
WATERFRONT MARKETING TACTICS

SPORTS PARK

Beach Volleyball, Rock Climbing Wall, Running Tracks, and Basketball Courts.

Sport Fields, Tennis Courts and Skateboarding Parks.
MARATHONS

Sponsored marathons or walks for charity, starting and ending on site.

FITNESS CLASSES

Outdoor fitness classes, including bootcamps, yoga, and running clubs.
FLOWER GARDENS

Gardens of seasonal flowers such as tulips, sunflowers and/or cherry blossoms creating an interesting backdrop for photo opportunities for events (weddings), or become a destination of interest where instgrammable moments are captured.

EVENT SPACE

Outdoor venue and event space for weddings and/or conventions. Waterfront and gardens to act as backdrop for photos, capturing memories and instgrammable moments.
WATER FOUNTAINS

A play area for children and families to enjoy and cool-off in the summer.

BOATING RENTALS

Sail boat, kayak, canoe and paddle board rentals.
Outdoor winter markets celebrating the holidays.

Firework celebrations for holidays such as Canada Day, Victoria Day and New Years Eve.
FERRY SERVICES & CRUISE BOATS

Ferry services creating connectivity between neighbouring communities. Cruise ships offering dinner and spa services. Food and beverage catered by restaurant on site.

EXPERIENTIAL

Experiential programming and retail such as virtual reality, outdoor movie nights, mini golf and go-karting.
WATERFRONT MARKETING TACTICS

SUSTAINABILITY & GREEN SPACES

Developers and retailers are becoming more aware when it comes to sustainability, conservationism and green spaces when it comes to design, practices and products. Examples include:

- Rooftop Farming
- Modular Farming
- Vertical Farming
- Eco-friendly design
- Herb and vegetable gardens
- Greenery

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- Rooftop Farming
- Modular Farming
- Vertical Farming
- Eco-friendly design
- Herb and vegetable gardens
- Greenery
WATERFRONT MARKETING TACTICS

SUSTAINABILITY & GREEN SPACES
West Harbour is in a unique position where this development could become a part of reimagining Hamilton’s future as a city. There are numerous examples to look to and learn from and West Harbour could take both positives and negatives from global experiences and its neighbours to the east, specifically Oakville, Burlington and Port Credit. The vision for West Harbour should aim for a more sustainable and inclusive development model that leads in innovative design, community development, inclusiveness, environment awareness, health and wellness, culture and the arts and improving the quality of life for all Hamiltonians. Positioning West Harbour for the future and as an example of what to do right when it comes to waterfront developments, will put West Harbour at the forefront of waterfront communities.

West Harbour could have a distinct advantage over other neighbouring waterfront communities, particularly Oakville and Burlington, which lack the history, cultural vibrancy, generational and ethnic diversity of Hamilton. Olde Oakville’s reputation as an older, more sterile, well-established community presents a challenge for the city. There is a significantly older demographic (over a third of the population is over 65 years) and a limited younger generation (only 13% are millennials). Businesses in downtown Oakville have suffered over the last several years. High rents, lack of parking, high price of parking and high ticket fines, compounded by ongoing construction on the Lakeshore has left many storefront shuttered. The focus on downtown Oakville as a shopping only destination for an older crowd, skewed mainly to women, along with a limited range of choices in retail, food and drinking options, has led to a very sterile downtown environment. One which is now threatening Oakville’s relevance and image and has resulted in low pedestrian traffic and an unanimated street front, failing to attract
visitors from outside the community. Burlington, a bedroom community with predominantly single family homes, is known mostly as a nice place to raise a family and lacks any urban vibe. Restaurants are limited and the only way to get around is by car. Although situated on the waterfront, it will be difficult for Burlington to be anything more than a local community and a suburb outside of Toronto. There is not enough to attract visitors from outside. Public transportation is limited and there is a lack of interesting retail and restaurant venues and generally things to do in this community.

Downtown Port Credit, in contrast, is a good example of a growing vibrant waterfront neighbourhood. It has small town charm, a bustling streetscape, easy access to public transportation (Port Credit GO is 3 blocks from the Waterfront) and is a short drive to downtown Toronto. There is a healthy mix of residences and residents. Types of dwellings include everything from modest pre and post war homes and historic residences to newer luxury homes and townhomes. Renters make up about 60% of the residents in Port Credit and there is an eclectic mix of people from varied backgrounds. One third of the population is immigrants. The fact that it is part of Mississauga, a global and intensely multi-cultural city contributes to its rich vibrancy.

There is much history in this town where generations have grown up and many continue to live today. From its historical Port Credit Memorial Arena to its well-known events, fairs, concerts, festivals, bike paths and Marina, this Village on the Lake, is a popular destination in the summer. It is also home to boating, fishing charters, cruises, sailing, canoeing and kayaking, as well as hiking and biking along the Waterfront. Port Credit is also poised for further growth with two major waterfront projects underway which will further transform the Village by the Lake.

Hamilton could look to Port Credit, a community with much diversity as an example of a waterfront neighbourhood, where growth has spelled success. The City’s political leaders have led in this discussion. Decisions made for the waterfront development will determine whether Hamilton is just “having a moment” or if there is enough momentum to continue its renaissance. The question has been asked whether Hamilton could be to Toronto what Brooklyn is to New York. With the opening of new restaurants in recent years, there has been a veritable explosion of the food scene in downtown Hamilton. There is already a healthy and growing arts scene, and the monthly Art Crawl, is hugely popular with the locals. Hamilton’s identity is changing quickly as continued growth redefines its image.

Projects like the LRT and the Waterfront will be a driving force in creating a compelling narrative for the city. The Waterfront must be more than a residential and commercial development if it is to distinguish Hamilton from its neighbours. It has to be a place for the people. Bringing the community in is important. There must be a strategic approach to the growth and development of the waterfront, to create a visitor destination, through creative placemaking and community-building initiatives. This in turn will benefit the whole community economically and socially.

Leveraging Hamilton’s growing reputation as a place with a distinctive and growing creative community will be important to increasing the appeal of Hamilton to outsiders. Permanent and temporary installations promoting arts, culture and community, along with family friendly programming, special concerts and events must be a key priority. These will be as important and integral to the conversation and visioning process as the residential and components. The City must play a leading role in this conversation. By engaging local residents and civic stakeholders collaboratively in a discussion regarding placemaking initiatives, important connections between the people and the waterfront will be cultivated.
CONCLUSION

The focus of West Harbour must be to create a multi-purpose destination. Without sufficient density on the site, it will be impossible to create a pure retail destination which would be economically viable, profitable and sustainable.

WEST HARBOUR MUST HAVE A "HEART"

It must become a place that people like and want to go to. In order to achieve this, a multi-pronged strategy must be adopted. One which includes retail, but does not make retail or commercial the key driver of the site. Retail cannot thrive if it is dependent only on the on-site residents, as there will not be enough density on the site at the outset to support it.

Definitive steps must be taken to include placemaking initiatives, promoting a 24 hour destination with a focus on walkability, accessibility and connectivity to the city and between all components on the site. A roadmap must be created to ensure its sustainability and success. And the retail must be carefully curated with a focus on unique and flexible concepts and destination uses.

The infrastructure of the physical space must be flexible and adaptable as well to be able to transform and transition as the site develops and densifies and the needs and requirements of the residents and locals change.

SOME INITIATIVES TO CONSIDER:

1) Temporary and flexible installations using the public space such as:

Public gardens can play a powerful role in establishing a sense of place. From community gardens to public gardens which can create a tourist destination. Some examples of amazing public gardens globally and nationally are The Rose Garden in the city park in Madrid, and Ottawa’s annual Tulip Festival, as seen in previous images of this report.

Community gardens can also promote social ties with the community. Vegetable and herb gardens, can promote sustainable practices and social ties with the community as seen in previous images of this report as well. The gardens could be operated and managed by local groups in the community and could also be used for a variety of purposes, including as an educational tool to promote health, wellness in the community. Youth programs could be implemented to encourage and educate students on nutrition, as another example. Lastly, the gardens could also become part of an ecosystem within the development, where the resident restaurant operator(s) can use the garden to source the herbs and vegetables needed for the restaurant(s). This in turn could create a beautiful narrative where the site becomes a platform for community co-operation, interaction and self sustenance.

More examples that can be found throughout the report:

• Temporary or permanent art installations
• Stadium seating
• Celebration Square
• Unique permanent landmarks

2) Entertainment and leisure

Developing West Harbour and its public spaces along the waterfront to include artistic, cultural, recreational, entertainment and tourist components will attract visitors from outside communities as well as tourists. This component will be crucial to ensuring long term viability and success.
More examples that can be found throughout the report:

**Recreational and Experiential**
- Outdoor movies
- Mini putt
- Virtual Reality

**Food**
- Temporary food hall – As was done on Paper Island in Copenhagen where local chefs are celebrated and profiled
- Celebrations focusing on the cultural diversity of Hamilton
- Chef nights and/or chef cook-offs
- Food Trucks
- Temporary food festivals and/or markets

**Health and Wellness**
- Multi-use sports park used for basketball, soccer, ball hockey or tennis
- Outdoor fitness classes i.e. boot camps or yoga
- Water sports such as kayaking and canoeing
- Cycling, rollerblading and/or rock-climbing walls
- Beach volleyball
- Marathons

**Arts and Culture**
- Cooking classes held in the restaurants
- Site to be integrated into the already popular Art Crawl
- Museum celebrating Hamilton’s heritage
- Temporary Art installations
- Events and performances such as concerts, music festivals or fashion shows

This waterfront development should enhance the ongoing revitalization which is happening around the City of Hamilton. The success of West Harbour as a “Gateway” to the waterfront and a catalyst of things to come is dependent on the collaboration between the city, the community and the developers. Single purpose use at Piers 6-8 as a retail building cannot work without all of the components previously mentioned.

Important best fit strategies for the retail component must include incubating local brands through the curation of a mix of restaurant and destination uses and venues. Maintaining adaptability and flexibility in structure and design is crucial for the execution of a long-term vision and strategy. The ability to use the waterfront as the canvas and backdrop not only to maximize sales for the retail and restaurants but to animate the public realm must be prioritized. Restaurants, recreational, service and entertainment uses must be outward facing to the water, with outdoor patios and outdoor areas for bootcamps or fitness classes such as yoga for example (if the use is a fitness facility).

West Harbour must be viewed as a platform for the entire waterfront development, a connection between people, place, neighbourhood and city. It must become a place for social interaction, creating a sense of place and identity. Like Copenhagen’s Paper Island, which was known for its industrial storage warehouses, Hamilton is known for its past history as a steel and manufacturing town. West Harbour can capitalize on this history to create a compelling destination, becoming the hub to advance Hamilton’s already dynamic food, arts and culture scene.
PLACEMAKING ALONG WEST HARBOURFRONT HAMILTON, ON

A Community Conversation
August 22^{nd}, 2019
West Harbour Waterfront (2017)
Transforming Hamilton’s West Harbour
Built on a Foundation of Public Parks & Open Spaces
Piers 5 to 7: Planned Enhancements
Piers 5 to 7: Redevelopment Vision
Future Vision for Hamilton’s West Harbour
About PPS

Project for Public Spaces (PPS) is a nonprofit organization dedicated to helping people create and sustain public spaces that build strong communities.

We are the central hub of the global placemaking movement, connecting people to ideas, resources, expertise, and partners who see place as the key to addressing our greatest challenges.
43 countries, 6 continents, 50 US states, 7 Canadian provinces, 110 major cities, 3,000 communities

40+ Years of Placemaking
“People tend to sit where there are places to sit.”
“It’s hard to create a space that will not attract people, what is remarkable, is how often this has been accomplished.”
“What attracts people most it would appear, is other people.”
“If you want to seed a place with activity, put out food”
TODAY’S SCHEDULE

6:00 – 6:10pm      Welcome & Introductions (CoH)
6:10 – 6:40 pm      Introduction to Placemaking (PPS)
6:40 – 7:15 pm      Activity #1 – Activations by Area
7:15 – 7:35 pm      Groups report back
7:35 – 7:55 pm      Activity #2 – A Day at West Harbourfront
7:55 – 8:00 pm      Wrap-Up and Next Steps (CoH)
GOALS FOR TODAY’S CONVERSATION

• Get inspired!
• **Propose program and activation ideas** for existing and future destinations at the West Harbourfront
• Identify **short term** LQC (Lighter, Quicker, Cheaper) **interventions** to be implemented in the next 3-6 months
• Help ensure an engaging and friendly waterfront experience!
Placemaking is a collaborative process of people coming together to create the great public spaces at the heart of their communities.
BASICS ELEMENTS IN WATERFRONTS & PUBLIC SPACES

- Food
- Places to Sit
- Water
- Sun/Shade
- Sense of Scale
- Triangulation/
Multiple Things to Do
- Places to People Watch
- Programming
DESIGN LED VS. PLACE LED PROCESS

PROBLEM/SOLUTION DEFINED

IDENTIFY CONSTRAINTS

DESIGN TO AVOID CONSTRAINTS

EVALUATE DAMAGES OF CONSTRAINTS

MITIGATE DAMAGES OF CONSTRAINTS

GET ENVIRONMENTAL APPROVALS

PUBLIC INPUT

DESIGN

PUBLIC INPUT

BUILD

MEET WITH THE COMMUNITY & IDENTIFY STAKEHOLDERS

EVALUATE SPACE & IDENTIFY ISSUES

PLACE VISION & MANAGEMENT STRATEGY

SHORT-TERM EXPERIMENTS

ONGOING REEVALUATION & LONG-TERM IMPROVEMENTS
WHAT MAKES A GREAT PLACE?
OUTCOMES OF GREAT PLACES

PLACE

- Promotes sense of comfort
- Creates improved accessibility
- Nurtures & defines sense of community
- Builds & supports the local economy
- Promotes health
- Fosters social interaction
THE COMMUNITY IS THE EXPERT
“Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody.”

– JANE JACOBS
WE CAN’T DO IT ALONE
START WITH SIMPLE IMPROVEMENTS LIGHTER, QUICKER, CHEAPER
WATERFRONTS & LIGHTER QUICKER AND CHEAPER
A SIMPLE STRATEGY FOR IMMEDIATE IMPLEMENTATION

• Create energetic anchors of activity
• Make it a “movable feast”
• Get life outside in parks & plazas, on streets, sidewalks and boardwalks
• Bring the inside out
• Use short-term experiments
YOU ARE NEVER FINISHED
THE POWER OF TEN

THINKING SMALL
IN A BIG WAY
BUILDING A NETWORK OF PLACES

City/Region
10+ MAJOR DESTINATIONS

Destination
10+ PLACES IN EACH

Place
10+ THINGS TO DO, LAYERED TO CREATE SYNERGY
Power of 10 at the Beach Scale

- Watch the Fountains
- Catch a show
- Eat dinner/lunch
- Find some shade
- Play in the sand
- Dance
- Lounge in the sun
- Have a drink
- Meet a friend
- Play a game
WHAT MAKES A GREAT PLACE?

PLACE

USES & ACTIVITIES

SOCIABILITY

ACCESS & LINKAGES

COMFORT & IMAGE

KEY ATTRIBUTES

INTANGIBLES

MEASUREMENTS

PROJECT FOR PUBLIC SPACES

Appendix "B" to Report PED19191

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USES & ACTIVITIES
COMFORT & IMAGE
ACCESS & LINKAGES
Detroit: Belle Isle -- Event Signage
SOCIABILITY
WHAT'S HAPPENING AT THE WEST HARBOUR WATERFRONT?
WEST HARBOURFRONT

TIMELINE

1993  Opening of Bayfront Park and Pier 4
2010  Recreation Master Plan/Public Input
2019-20 Construction of waterfront trail and water edge boardwalk
Opening of Main Basin (Piers 5-6-7) to public
2020-? Pier 8 Promenade and development infrastructure construction for Pier 8 construction
August 2019 Placemaking Conversation to guide future activation
Fall 2019-
Spring 2020 Short term intervention and activities
BAYFRONT PARK

EXISTING CHARACTER:
Large natural park area and event space

EXISTING USES:
Overlook
Diner
Gazebo and beach
Nature Trail
Boat launch
BAYFRONT PARK
EXISTING CHARACTER:
Recreational boating & naturalized shoreline

EXISTING USES:
Yacht clubs
Police marine facility
Boardwalk/trail
EXISTING CHARACTER:
Festival & Small Scale Event Space

EXISTING USES:
Bayport tugboat Playground Trail
Gartshore Thomson building
Leander Rowing Club Beach Piers
MAIN BASIN
(Piers 5, 6, 7)

EXISTING CHARACTER:
Marine uses

EXISTING USES:
Close to general public
Marine uses Boardwalk
Yacht Club
MAIN BASIN
EXISTING CHARACTER:
Active Recreational

EXISTING USES:
Ice Rink/Roller skate
Café’
Ice cream parlor
Waterfront Stage Lawn
Coffee Pub
HWT Centre
FUTURE CHARACTER:
Play
Residential development

PLANNED USES:

Hammer Harbor
- Washroom
- Information
- Gantry Pavilion
- Amphitheater

The Landing
- Art
- Observation Deck
- Lawn

Boatworks Promenade
- Steel Beach
- Picnic Lawn
- Ball Courts
- Playground
- Wetland & Plaza
- Outdoor Library & Lounge
The Landing marks the transition between the north and east piers. It is the site of forgotten and imminent rituals; a place to celebrate a solstice sunrise and contemplate art. The Landing will mean many things to many people; it is a space for Hamilton to define.

The Boatworks Promenade uses the forms of the steel freighters that once moored along its edge to create iconic forms that house a range of program. The forms of the boats are used to manipulate the topography, creating negative and positive spaces, which offer a diversity of micro-climates, program and views.

Hammer Harbour is the sheltered heart of the site where Hamilton gathers together. A multi-use Gantry Pavilion provides the infrastructure for events like farmers markets, art shows, music nights and concerts. A floating stage dramatically set against the iconic industrial skyline of Hamilton expands the site’s offerings. Spaces adjacent to the mixed-use buildings allow for first-floor restaurants to utilize the site for outdoor dining.

Pier 8 Park is a celebration of industrial Hamilton: past, present and future. The park adopts forms from Hammer Town’s iconic industrial harbours and transforms them into scaffolding for public spaces in three unique ways. Along the Boatworks Promenade the huge steel hulls transform intoNegative spaces, create parkettes of program along the north shore. In Hammer Harbour a monumental Gantry Pavilion transforms to support diverse city-scale events. At the corner of the site, the Landing provides a powerful site ready for Hamilton to define it. Built with steel, concrete and timber, Pier 8 Park is a reflection of the strength and genuine character of the city. Fort Hamilton 8.

PIER 8 PARK
1 SITE, 3 PLACES

HAMMER HARBOUR

THE LANDING

BOATWORKS PROMENADE

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EXISTING CHARACTER:
Historical- **HMCS Haida** is a Tribal-class destroyer that served in the Royal Canadian Navy from 1943 to 1963, participating in World War II and the Korean War. She was named for the Haida people.

EXISTING USES:
Haida Historical site
Naval base
Dock Service Road connecting to Westwood Park
EASTWOOD PARK

EXISTING CHARACTER:
Recreation
Local Park,
neighborhood events,
Ball fields games

EXISTING USES:
Baseball
Soccer
Playground
Spray pad
Shade and restroom
building
SHARE YOUR IDEAS!
GROUP ACTIVITIES

ACTIVITY #1 – Activations by Area
Power of 10 at the Destination level

ACTIVITY #2 – A Day at West Harbourfront
Power of 10 at the Waterfront level
ACTIVITY # 1
Activation by Area

Create an Action Plan to turn your assigned area into a great place with multiple activations with the Power of 10.

• Select one person from your table to be the NOTETAKER of your group for this activity.
• As a Group, review the map and images of your ASSIGNED AREA.
• Individually, take 10 minutes to answer the questions in your PLACE GAME.
• As a group, create an ACTION PLAN. Fill out the Placemaking Activation Plan form using your answers to the questions in your Place Game. Come to consensus on your group’s top five ideas.
• Pick a PRESENTER to share your ACTION PLAN with the workshop audience.
WHAT MAKES A GREAT PLACE?

- KEY ATTRIBUTES
- INTANGIBLES
- MEASUREMENTS

Project for Public Spaces (PPS) is a nonprofit planning, design, and educational organization dedicated to helping people create and sustain public spaces that build stronger communities. Our pioneering Placemaking approach helps citizens transform their public spaces into places that highlight local assets, spur rejuvenation and serve common needs.

PPS was founded in 1975 to expand on the work of William H. Whyte, author of The Social Life of Small Urban Spaces. We have since completed projects in more than 5000 communities in 43 countries and all 50 U.S. states and are the premier center for best practices, information, and resources in placemaking. More than 600 people worldwide are members of our Placemaking Leadership Council.

West Harbourfront - Hamilton ON
August 2019
### AREA NAME: Bayfront Park

#### PLACEMAKING ACTION PLAN

<table>
<thead>
<tr>
<th>Type of activation</th>
<th>Amenities</th>
<th>Implementing Partners</th>
<th>Short Term Improvements</th>
<th>Long Term Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boating and bird watching tours</td>
<td>10 small rowing boats and instructors</td>
<td>Bird watch group and Macassa Yacht club</td>
<td>Boat Launch Storage shed with binoculars and</td>
<td>Bird watching center</td>
</tr>
</tbody>
</table>

*Short Term (3-6 mos), Med Term (6 - 12 mos), Long Term (a year or more)*
ACTIVITY # 2
A Day at West Harbourfront

Use the role assigned to your table to help you map an itinerary for a day at West Harbourfront.

• Assign a new NOTETAKER to record your group’s ideas on the map.
• With your GROUP, come up with a day’s worth of activities and map it out. Aim for at least 10 things to do along the waterfront.

ROLES
• Northend resident
• Senior
• Caregiver with a young child in a stroller
• Family
• Teenagers
• Boater/Marina patrons
• Downtown Resident/Employee
• Tourist Couple
• Youth group
Example:

"A tourist couple's day at West Harbourfront"

Appendix "B" to Report PED19191
Page 115 of 116
TO: Tamara Bates
   Legislative Coordinator,
   Office of the City Clerk

DATE: July 15, 2019

FROM: Stephanie Paparella
   Legislative Coordinator,
   Office of the City Clerk

SUBJECT: 0.13% Increase for Capital Financing of West Harbour Development

Please be advised that, at its meeting of July 12, 2019, Council approved Item 4(h) of the General Issues Committee, which reads as follows:

4. **2020 Budget Guidelines, Outlook and Process (FCS19054) (City Wide) (Item 9.2)**

   (h) That the matter of a 0.13% increase for capital financing of West Harbour Development (WH) for a total of 1.3% tax increase, be referred to the West Harbour Development Sub-Committee for consideration.

Please take the necessary steps to carry out the direction of Council, with respect to the resolution above.

Thank you!