



City of Toronto

Toronto Retail Design and Development Best Practices Manual
Retail Design Manual 2019

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Visit Retail Design Manual online:

Toronto Retail Design and Development Best Practices Background Report
<https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/design-guidelines/retail-design/>

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Executive Summary

The City of Toronto Retail Design Manual provides guidance on developing successful ground floor retail spaces. The intent is to provide aspirational retail design best practices to inform, guide, inspire and educate architects, retail designers, City staff and the development community.

The Manual is the product of research and consultation that considered how other jurisdictions have approached retail design, current retail trends, Toronto's planning context, retail design practices that have been demonstrated to meet the needs of businesses and an evaluation of retail development case studies. This foundational research is summarized in the following Background Report.

A self-contained Retail Design Manual summarizes best practices to consider when developing and designing retail spaces. It considers the design of the ground floor along the street edge and public spaces and does not address the layout of basement or second floor retail space, interior malls or the internal layout of shopping centre sites.

The two documents are intended to be used together, with the Background Report summarizing the foundational research and providing the context for the design considerations outlined in the Manual.

<https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/design-guidelines/retail-design/>



1.0 Introduction

- 1.1 Purpose**
- 1.2 Why Now?**
- 1.3 Study Process**
- 1.4 Scope of the Study**

1.1 PURPOSE

The City of Toronto Retail Design Manual provides guidance on developing successful ground floor retail spaces. The intent is to provide aspirational retail design best practices to inform, guide, inspire and educate architects, retail designers, City staff and the development community.

1.2 WHY NOW?

The City of Toronto Planning Division initiated the production of a Manual in 2018 to help deliver on the objectives of complete communities and vibrant streets. The City's ability to secure successful, resilient and dynamic retail uses through the development review process is closely tied to its success in achieving these objectives.

In a context of rising land values and intensification, much of the new retail space added in Toronto has been and likely will continue to be incorporated within the base of mixed use buildings. In contrast to single use retail buildings, retail in mixed use buildings cannot be readily modified to reflect changing conditions. This increased permanence, combined with significant redevelopment pressures along Toronto's traditional and evolving main streets, necessitates increased diligence on design quality, resiliency, adaptability, and long-term viability of street-oriented retail uses.

The need for improved retail design in new developments was raised in consultations across the city as well as in the ***TOcore Retail and Service Commercial Land Use Study***. It was noted that retail development is a specific niche specialty within the development and architectural industry. Some buildings with a retail ground floor in a predominately residential, office or institutional development had left a legacy of spaces with inflexible retail interior design not well suited to most retail operations or to future adaption to transitioning markets and new technologies. Many had inefficient loading and servicing spaces, limited opportunities for independent and small businesses, or facades that did not successfully animate the sidewalk. The TOcore Proposals Report (November 2016) recommended the development of a non-statutory document to provide direction on retail design:

"Well-designed and flexible retail spaces are able to evolve over time to meet the changing needs of tenants while better activating the public realm. Through public consultation, it was identified that achieving better designed retail space was an important priority. To help support this objective, City Planning – in consultation with the BIAs and industry stakeholders – will be developing a Street Retail Best Practices Design Manual. This Manual will provide guidance to developers, architects and staff on the best practices in street retail design."

1.3 STUDY PROCESS

The study and the Retail Design Manual were products of close collaboration between City staff and the consultant team of Three Sixty Collective in association with GH+A Design, assisted by HrZ Research Insights and Kool Space. The following background research was undertaken:

1. A review of the Toronto planning and regulatory context, summarized in Section 2;
2. An evaluation of retail design guidelines and manuals in use in other jurisdictions, summarized in Appendix 1;
3. A review of changes that are impacting the retail sector and their implications for design and development, summarized in Section 4; and
4. An extensive industry wide stakeholder engagement.

This work informed consideration of the questions:

"What is successful retail development?"
 "What role does design play in determining retail success?"

As summarized in Section 5, it was concluded that successful retail spaces should contribute to the city building objectives of complete communities and vibrant streets as well as meet the needs of the consumer and the retail businesses that will occupy the spaces. In addition, they must contribute to economic development objectives, environmental sustainability and the overall quality of the built environment and community life. They must enhance the character and amenity of surrounding commercial blocks and nearby residential neighbourhoods. They must be flexible to allow for the incorporation of new technologies and for a diversity of uses that may evolve over time. The interplay between these various factors was explored for three different geographic scales: (i) the neighbourhood, (ii) commercial area and (iii) individual buildings and retail units.

Ten case study retail projects that represented a range of development contexts were evaluated with reference to the principles that define retail success. This work is summarized in Section 6 and Appendix 4.

This work led to the identification of a set of best practices in retail design. The companion Retail Design Manual describes the best practices for each design element. The Manual focuses on the customers' experience of the retail street, encompassing the public realm and the building façade and retail frontage. It begins with the overall building as seen from far away and then proceeds to consider the elements that customers become aware of as they move closer. It is organized into three Sections – The Building, The Street & Retail Frontage and The Retail Space. It proceeds from the macro scale (e.g. overall building massing, materiality) to the micro scale (e.g. entrances, display windows) to the functionality of retail operations from the customers' perspective (e.g. lighting, interior columns).

The study process was highly collaborative. A Technical Advisory Committee made up of City staff from across the City Planning Division as well as from Economic Development and Culture, Transportation Services and Toronto Buildings was consulted at key milestones. Eight members were individually interviewed to ensure that a wide range of perspectives and areas of expertise were incorporated in the study.

External stakeholders and industry experts also were consulted. The consultant team included a commercial broker who specializes in retail leasing. Discussions were held with BIA representatives, Toronto Design Review Panel and with a cross section of retail industry and development experts. Their feedback was considered in developing the Manual.

1.4 SCOPE OF THE STUDY

The term “retail” applies to stores selling merchandise as well as to restaurants, personal services, entertainment venues, small medical, financial and professional offices and other uses that typically occupy ground floor space in commercial districts and buildings. Auto-oriented uses (e.g. car dealerships, service stations, gas stations) are not addressed.

The focus of the study is on architectural and design factors for the street frontage of buildings, public realm interface and retail units. It considers the design of the ground floor along the street edge and public spaces, and does not address the layout of basement or second floor retail space, interior malls or the internal layout of shopping centre sites.

It is intended that the resultant Retail Design Manual apply city-wide to all new developments that include ground level retail space which intersects with the street edge or public spaces. This encompasses a diversity of street and development contexts, summarized in Section 3.

The Retail Design Manual supports the implementation of Toronto's Official Plan and should be read comprehensively and together with other City documents that provide direction on built-form and public realm. The most relevant policies and guidelines are summarized in Section 2 and Appendix 2.



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2.0 Planning Framework

The Retail Design Manual supplements the City of Toronto's current planning framework as it pertains to the design of retail spaces at grade. It should be read comprehensively and together with other City documents that provide direction and built-form and the public realm. The key foundational policies are summarized below. Appendix 2 lists and provides references for other city-wide guidelines and regulations and some area-specific studies and Secondary Plans that address retail design considerations.

It should be noted that the following description and Appendix 2 are provided for contextual purposes only. It is not comprehensive and may omit requirements or policies for specific sites or situations. It reflects the planning framework as it existed in October 2019. More recent studies, policies, regulations and amendments are not included.

- 2.1 Growth Plan for the Greater Golden Horseshoe, 2019**
- 2.2 Toronto Official Plan**
- 2.3 Avenues and Mid Rise Buildings Performance Standards**
- 2.4 Other City-Wide Regulations and Guidelines**
- 2.5 Heritage Conservation Districts**
- 2.6 Business Improvement Areas (BIAs)**

2.1 GROWTH PLAN FOR THE GREATER GOLDEN HORSESHOE, 2019

The Province of Ontario's Growth Plan requires that development support the achievement of "complete communities", which are intended to meet people's needs for daily living throughout an entire lifetime by providing convenient access to an appropriate mix of jobs, local services, public service facilities and a full range of housing to accommodate a range of incomes and household sizes.

The Plan also emphasizes optimizing the existing urban land supply to support intensification, and the development of communities with a diverse mix of land uses, a more compact built form and a vibrant public realm.

2.2 TORONTO OFFICIAL PLAN

The City of Toronto's Official Plan implements the Growth Plan. The vision of the Plan is relevant to the context for the Retail Design Manual.

The Plan's vision is to create an attractive and safe city that evokes pride, passion and a sense of belonging – a city where people of all ages and abilities can enjoy a good quality of life. Characteristics that will achieve this goal include:

- Vibrant neighbourhoods that are part of complete communities,
- Attractive tree lined streets with shops and housing that are made for walking,
- Beautiful architecture and excellent urban design that astonish and inspire.

The Plan recognizes that the population of Toronto is going to grow. It provides a policy framework to support the expansion of the retail sector to serve the growing population in different forms and settings. The Plan also acknowledges that the land base of the City will remain the same despite anticipated population growth, and as a result encourages more intensive formats of retail within multi-storey buildings with less emphasis on surface parking to make the best use of the available land.

The Plan also highlights the importance and relevance of the **Public Realm** and **Built Form** to the design of the retail ground floor. Building a high quality public realm that features a comfortable environment for pedestrians and cyclists and ensuring a built form that complements the existing and planned context is essential to attract businesses, workers, residents and shoppers.

Section 3.5.3 of the Plan provides the policy context for the **Future of Retailing**. This Section was introduced by Official Plan Amendment 231, was appealed, and a decision by the Local Planning Appeal Tribunal (LPAT) had not yet been determined at the time of writing (October 2019).

The policies in Section 3.5.3 provide guidance for pedestrian shopping areas and in particular, they:

- Recognize the role of pedestrian shopping areas as centres of community activity;
- Provide for limits on new retail development and store sizes in support of that role;
- Recognize such limits may also function as 'triggers' for review of proposals; and
- Identify matters to be addressed in applications for development that may exceed such limits.

In addition, the Plan recognizes that a key element of the City's pedestrian shopping areas is the typical built form of small stores and the fine-grained rhythm of doorways and windows. This built form creates a safe, comfortable and interesting experience for shoppers and pedestrians.

2.3 AVENUES AND MID RISE BUILDINGS STUDY

Further to the Official Plan, the City undertook a city-wide study of how to promote mid-rise mixed use development on the Avenues (2010). This resulted in a set of performance standards to be applied when considering development applications in areas where a local Avenues Study has not been completed (see Appendix 2 for reference).

Avenues are categorized and mapped based on where retail commercial at grade is required, encouraged or permitted. This is based on an understanding of where existing and future communities are located or evolving.

The study identified a number of Performance Standards with particular applicability to the design of retail ground floor uses, such as the alignment and articulation of the front building façade, street wall continuity, building width, residential at-grade uses, loading and servicing considerations, and heritage and character areas contexts.

2.4 OTHER CITY-WIDE REGULATIONS AND GUIDELINES STANDARDS

- The Zoning By-law's (By-law 569-2013) requirement that the floor level of the first storey of non-residential use must be within 0.2 m of grade in CR districts (40.10.40.1 (2a));
- The Zoning By-law's requirement that the minimum height of the first storey, as measured between the floor of the first storey and the ceiling of the first storey, be 4.5 m (40.10.40.10 (5));
- The Toronto Sign By-law (Chapter 694 of the Toronto Municipal Code);
- Boulevard Café and Marketing Display Regulations (Chapter 742 of the Toronto Municipal Code), which establishes requirements for permitting cafes and merchandise displays in the public right of way;
- Tall Buildings Design Guidelines, which include design guidelines for the building base that are generally aligned with those for mid-rise buildings;
- Toronto Bird Friendly Development Guidelines, which include recommendations for bird-friendly lighting;
- Complete Streets Guidelines, which include guidelines for sidewalk widths, amenities and building setbacks; and
- Vibrant Street Guidelines, which establish sidewalk zones and guidelines for street furniture.

References to these documents are listed in Appendix 2.

2.5 HERITAGE CONSERVATION DISTRICTS

The City of Toronto designates neighbourhoods with distinct heritage character as Heritage Conservation Districts (HCD) under the authority provided by the Ontario Heritage Act. Detailed studies and plans are done for these areas to define and conserve the significant qualities of their natural and cultural resources. The plans often include guidelines and regulations for the massing of buildings, elements on the building façade, store unit sizes and storefront widths. Twenty-one Heritage Construction Districts have been designated in Toronto, four Districts have been approved by Council but are under Appeal to the LPAT, and ten potential Districts are being studied (See Appendix 2 for reference).

Toronto offers a Heritage Tax Rebate Program whereby commercial property owners may receive a rebate of up to 50% of the cost of eligible maintenance and conservation work up to a maximum of 40% of the annual property taxes. Eligible work includes the maintenance and conservation of buildings' exterior heritage elements.

2.6 BUSINESS IMPROVEMENT AREAS (BIAS)

There are 83 BIAs in the City of Toronto. Many BIAs have undertaken Streetscape Master Plans to guide future investment in streetscape improvements. Also, properties in these areas are eligible for façade improvement grants. There may be area-specific guidelines relevant to the design of the retail ground floor of new developments in these areas that should be checked.



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3.0 Commercial District Typologies

Toronto has an enormously complex retail commercial structure that has evolved over the city's close to two century history. It has been estimated that in total, there is approximately 6.5 million square metres of floor space located in about 380 different commercial nodes across the city (Centre for the Study of Commercial Activity, Commercial Activity in Canada, 2011, p. 82).

The physical characteristics of the main types of commercial districts are briefly summarized below. The Retail Design Manual should be used in all of the city's commercial districts.

- 3.1 Linear Retail Main Streets**
- 3.2 Heritage Commercial Districts**
- 3.3 Retail Street Corners**
- 3.4 Transitioning Retail Streets**
- 3.5 Auto-Oriented Retail Streets**
- 3.6 New Retail Streets**
- 3.7 Mall Redevelopments**
- 3.8 Freestanding "Big Box" Stores**
- 3.9 Commercial Development in Employment/Institutional Districts**
- 3.10 Commercial Development in Residential Neighbourhoods**

3.1 LINEAR RETAIL MAIN STREETS

These are traditional main streets in neighbourhoods first developed before about 1950. They often follow streetcar lines. Roads are narrow and are easily crossed. A fine grain of lots (typically about 7 metres wide and 30 metres deep) with ground floor retail and apartments above emerged on these streets. Some lots are serviced by rear and side yard public lanes but many rely exclusively on the main street frontage for access. Many main streets have clusters of other important community places such as churches and libraries which reinforce their social importance.

New development should maintain and support the continuity of the retail street in these locations. The design of the retail ground floor should respect the existing physical characteristics of the street, respond to changing markets and promote community identity and character.

3.2 HERITAGE COMMERCIAL DISTRICTS

Some main streets have been identified for their heritage character, significant buildings, and association with important architects, people and/or events. These districts may include properties on the City's Heritage Register, properties identified as having heritage potential through a planning study, or may be located within a Heritage Conservation District (HCD). In a retail main street context, important attributes of these properties may include the rhythm of entrances and glazing, window bays, cornice lines, signage, etc. In many cases, the City provides guidance on infill development in these contexts through HCDs, Urban Design Guidelines or other planning policies to ensure development in these districts respects and reinforces the prevailing heritage character.

3.3 RETAIL STREET CORNERS

Most of Toronto has a strong street grid that defines its neighbourhoods and transportation system. In a street grid city, these corner sites are the most accessible and visible. Corner sites generally have higher volumes of pedestrian traffic, are the locations of transit stops and therefore have the greatest potential for social interaction and sales opportunities. New developments should reinforce the visual prominence and social interaction potential of corner sites. The Retail Design Manual includes best practices to achieve this objective.

3.4 TRANSITIONING RETAIL STREETS

Many of Toronto's streets have limited or discontinuous retail uses, often interspersed with other uses and building types. Examples include Harbord Street, Bayview Avenue and College Street. As the city intensifies and accommodates increased residential development along its arterial roads, these non-retail block segments present opportunities to extend the retail frontage provided that sufficient growth in the neighbourhood residential market is anticipated. If there is insufficient market to support retail development in the short term but longer term growth is anticipated, the ground floor should be designed to accommodate both retail and non-retail uses to facilitate their future transition. Community uses that serve the local neighbourhood and are synergistic with retailing also are excellent options for these areas.

3.5 AUTO-ORIENTED RETAIL STREETS

Large sections of the arterial roads across the city that were developed after about 1950 are lined with commercial uses that are designed for customers arriving by automobile. In many cases, these roads are significantly wider and blocks are longer than on traditional main streets. Buildings are typically one or two storey with larger floor plates, varied setbacks and frequent side and front yards. "Strip malls" made up of contiguous retail units are common. Some malls are under single property ownership. In other cases, different property owners may own the individual units. Surface parking often is located between the retail and the public sidewalk.

While these retail spaces support their local communities and provide good locations for small independent businesses, this form of retail is not conducive to creating a positive pedestrian experience. As these areas are redeveloped, the retail streets should be incrementally transformed to better serve pedestrians and transit users while still maintaining their primary appeal to local communities.

3.6 NEW RETAIL STREETS

There are many areas in Toronto where growth is happening as part of the redevelopment of large sites. These large sites are being planned with new public streets, parks and open spaces and multiple buildings. This growth is often associated with the introduction of higher order transit.

It is intended that these areas become new complete communities over time. The location, design and phasing of the development's retail component is integral to achieving this goal and the retail component should be integrated as part of the planning framework at the outset. The new retail spaces should be located on streets which will have high volumes of pedestrian traffic, are adjacent to any transit stops and on streets that have existing retail uses. The Retail Design Manual provides best practices to apply when developing new retail streets in these contexts.

3.7 MALL REDEVELOPMENTS

Developers began to build comprehensive shopping centres in the 1950s's. They are centrally planned, curated and managed concentrations of stores and services designed to meet the needs of well-defined target markets. The original planning model was based on geographically defined communities ranging from convenience centres to neighbourhood, community, regional and super-regional centres, each with a formulized size range and tenant mix intended to meet the needs of a defined neighbourhood and population threshold. Power Centres, Outlet Centres, Life Style Centres and Hybrid Centres are more recent models based on attracting customers from large areas for specialized purposes.

All but the smaller convenience centres typically face away from the public street, designed to funnel customers in cars onto the site and have them park in surface lots or garages from which they can access individual stores or interior mall entrances. Planned shopping centres in higher density mixed use developments have adopted parallel principles oriented to drawing customers inside from transit stops and the public sidewalk.

Many of Toronto's shopping centres are now of an age where redevelopment is being considered to capitalize on new retail concepts and land owner ambitions for increased density. The approach to redevelopment ranges from the addition of public spaces or new retail buildings on surface parking areas to more ambitious plans incorporating residential or office towers and the phased redevelopment of the original retail buildings to a more urban form.

The Retail Design Manual includes guidelines for the development of the edge between comprehensive shopping centres and the public street. It does not include detailed guidelines for the design of the interior of these sites or interior malls.

3.8 FREESTANDING "BIG BOX" STORES

Big Box stores typically are purpose-built for a specific retailer. They generally are one or two storeys with floor plates exceeding 3,000 square metres. The size depends on the type of good sold and the business model of the particular retailer. Some build stores exceeding 10,000 square metres (e.g. Costco, Home Depot).

In Toronto, "big boxes" have often been built on former factory and warehouse sites, many in Employment Areas. Smaller big boxes (e.g. Staples, PetSmart, Indigo outlets) also have located along retail main streets or as freestanding buildings on shopping centre sites.

Incorporating big box stores into the fine-grained structure of pedestrian-oriented linear retail streets presents design challenges. These are often discouraged, and in some cases City policies or Zoning by-Laws prohibit retailers of a certain size in these locations. Where they are permitted, the Manual provides some solutions for more context sensitive integration.

3.9 COMMERCIAL DEVELOPMENT IN EMPLOYMENT / INSTITUTIONAL DISTRICTS

Small-scale commercial development is common in employment and institutional districts to serve the needs of local employees and clients. Restaurants, pharmacies, dry cleaners and convenience stores are typical uses.

Commercial development also has moved into employment areas to occupy vacant warehouse and manufacturing buildings. In other cases, factories add retail functions as an ancillary use, selling directly to the consumer from an on-site showroom. In Toronto, there are many examples of these retail clusters, for example in the Caledonia Road / Castlefield area, Orfus Road and Kennedy Road south of the 401. In this context, walkability can be improved when retail commercial uses are located on the ground floor of buildings along the sidewalk and transit routes.

3.10 COMMERCIAL DEVELOPMENT IN RESIDENTIAL NEIGHBOURHOODS

Some residential neighbourhoods in the city include local convenience stores, often located on street corners or in small clusters. In the city's older neighbourhoods they are sometimes on the ground floor of house-form buildings and, for the most part, started up organically and before zoning by-laws were created.

In post-1950 subdivisions the location of convenience shopping typically is pre-planned and organized in shopping centres. Post-1950 apartment neighbourhoods typically permitted only small amounts of commercial space in the ground floor of buildings. This resulted in local residents having to travel significant distances for shopping and convenience services. The City of Toronto introduced "Residential Apartment Commercial Zoning" (RAC) in 2017 to enable the location of a greater range of community and commercial uses in apartment neighbourhoods.

Active uses, including convenience retail, located on the ground floor of buildings and lining the sidewalk improves the walkability of these neighbourhoods' main pedestrian routes.



4.0 Drivers of Retail Change

Retailing is subject to constant change and transformation. The key drivers behind current change in the sector and their implications for design are described in Appendix 3. They are grouped into three themes: (a) changing consumer shopping behaviours and technology, (b) new retail experiences, and (c) retail and community building.

It is important to note that these selected drivers are interrelated and that there is no single driver that will define the future of retail. The drivers may impact retail businesses in different ways, over different time frames and to varying degrees. As a result, successful retail design and development best practices need to be both flexible and adaptable to meet the needs of a broad spectrum of retailers to create vibrant and viable retail spaces for the community over the longer-term.

At a high level, the drivers' cumulative impact on design is fourfold:

1. A blurring of activities that take place within stores and shopping districts as shopping becomes integrated into all aspects of life. For example, in-store delivery of on-line shopping and workstations and meeting spaces in coffee shops are being integrated into design.
2. Location, location, location is still a key determinant in retail decision making as time-strapped consumers place a premium on convenient access. The clustering of highly visible retail stores in easy-to-get-to locations near home and work is a required design element.
3. The emphasis in bricks-and-mortar stores and shopping districts is increasingly experiential and social. There is a need to provide meaningful and memorable experiences and opportunities for social interaction and “people-watching”. This is supported by:
 - using interesting high quality design elements,
 - integrating space for value-added services and store-made or grown artisanal products,
 - integrating space for people to gather and socialize both inside and outside the store.
4. Incorporating flexibility to adapt retail spaces to future trends, the ever-changing customer journey (decision-makers can now access detailed customer data almost instantaneously) and to test new products and concepts in small temporary spaces.

Appendix 3 provides a more detailed description of the drivers and their design implications as well as examples.



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5.0 Defining Retail Success

The Retail Design Manual is grounded by a set of principles that underpin most successful retail developments. The principles were determined by the Consultant Team's collective experience in working with retailers and retail developers as well as City Planning staff's experience in consulting with local residents, recommending planning policy and regulations and working with the development community. They reflect the principles used by other jurisdictions in their retail design guidelines, take into account recent changes impacting the retail sector and were tested by reviewing retail development case studies. They also were informed by consultation with the Technical Advisory Committee.

Four intertwined principles were identified and are explored below:

1. Support retail business functionality and profitability.
2. Support the achievement of complete communities and city building objectives.
3. Support local economic development and job growth.
4. Design adaptable structures that can accommodate the evolution and repurposing of retail space over time.

The principles are not mutually exclusive. They work in a mutually supportive fashion to achieve successful retail environments. In many cases, the same considerations influence the achievement of several principles.

How each of the principles can be achieved should be considered for the surrounding neighbourhood as a whole, for the commercial district and for the individual development or building. The following discussion provides illustrative examples. The main objective is to illustrate how retail design best practices should be supported by other considerations that are unrelated to design to achieve successful retail environments and complete communities. It is not intended to be a comprehensive or in-depth review of all possible approaches.

5.1 SUPPORT RETAIL BUSINESS FUNCTIONALITY AND PROFITABILITY

Retailing plays a key role in city building and economic development, but only if the space intended for retailing is occupied by successful businesses. There are four key considerations in achieving this principle.

5.1.1 PROVIDE SUFFICIENT MARKET POTENTIAL AND SUPPORT RETAILERS IN ATTRACTING CUSTOMERS

Community Level

There needs to be balance between the retail demand market conditions in the surrounding area and the amount of retail space.

- Well-established stable neighbourhoods usually will have achieved a balance. The types of retail businesses will change incrementally in response to changing neighbourhood demographics and consumer preferences or new opportunities. Consideration should be given to how any major new development will impact the balance and any resulting implications for the surrounding community's convenient access to goods and services and the planned functions of existing commercial districts.
- Residential intensification and the associated encouragement of mixed-use development with retail space on the ground floor can impact the balance. Assessments of the neighbourhood residential growth potential and associated retail market implications are useful components of planning studies to determine where retail space is to be required or encouraged. Many factors influence the amount of retail space that can be supported in any specific area or location. These are best evaluated in the context of a "market study". Such studies should include consideration of service establishments as well as retail stores and other sources of market support such as local employees. Additional market opportunities provided by post-secondary students, region-wide residents, tourism potential and specialty niche shopping and services may also be factors in some locations.

Commercial District Level

Clustered retailing is more convenient for shoppers and therefore usually more successful in attracting customers than scattered stores.

- The minimum size of an effective cluster varies depending on types of commercial services provided. Typically at least 4,000 m² of space is needed to begin to provide a good range of neighbourhood convenience goods and services. Larger clusters can incorporate a greater range of food services, shopping items, entertainment uses and specialized services.
- The maximum size of an effective cluster is set by average comfortable walking distance – about 800 m. Established linear retail streets almost always will have a natural break in commercial activity within this distance.
- On urban streets with right of way widths up to about 25 m and relatively short blocks, double sided commercial frontages form more effective clusters than single sided commercial frontages. People can readily shop along both sides of the street and don't have to double back along the same route.

Access is key to attracting customers.

- Consider how people will reach the commercial district by car, transit, cycling and walking. Provide adequate bike and car parking within convenient walking distances of storefronts. Ensure adequate wayfinding (including ride share drop-off).
- When redeveloping large sites, look for opportunities to provide direct routes to surrounding residences and employment areas for pedestrians, cyclists and vehicles.

Ensure strong visibility of the retail storefronts to attract customers (See Section 2.1 of Retail Design Manual).

- Enable pedestrians to walk close enough to storefronts to be able to see inside - generally within about 8 m.
- Design street elements and landscaping to enable storefront visibility from both the street and sidewalk.

Building Level

Encourage building owners and developers to assess market potential and retail gaps and identify tenants suited to the market opportunities early in the development process.

Design building to ensure strong visibility for retailers as is set out in the Retail Design Manual. Especially see Sections:

- 1.1 Building Massing
- 1.2 Material Differentiation
- 1.3 Overhangs, Weather Protection & Awnings
- 2.0 The Street and Retail Frontage
- 3.1. Lighting
- 3.2 Mechanical, Electrical & Plumbing

5.1.2 MEET TENANT COST AND FUNCTIONAL REQUIREMENTS

Tenant needs include space for efficient unit layouts and competitive operating cost structures. Many of the required considerations transcend physical design.

Community Level

Government policy needs to enable competitive operating cost structures.

- Tax rates
- Wage levels
- Energy rates

Government provides an efficient regulatory framework.

Commercial District Level

Real estate property values/rents and property tax assessments in a commercial district area should be in balance with retail sales potential (and therefore ability to pay).

Building Level

Design unit layouts that meet the functional requirements of desired tenants as set out in the Retail Design Manual. Especially see Sections:

- 1.4 Storefront Width to Depth
- 1.5 Ceiling Heights
- 2.3 Contiguous Retail Frontage
- 2.4 Entrances
- 3.4 Columns

Use energy-efficient materials and lighting to save on operating costs.

Set rents and terms of lease appropriate to the desired tenant mix and competitive with other buildings.

5.1.3. MEET TENANT “BACK OF HOUSE” AND OTHER FUNCTIONAL REQUIREMENTS

Community Level

Provide adequate services to meet commercial needs including solid waste collection, snow clearing and removal, street cleaning, etc.

Commercial District Level

Avoid curbside garbage storage and pick-up where feasible; where it's necessary, minimize impact on sidewalk amenity.

Where rear access for deliveries is not feasible, ensure that adequate curbside loading can occur.

Building Level

See Retail Design Manual, Sections:

3.2 Mechanical, Electrical & Plumbing

3.3 Shipping & Receiving

5.2 SUPPORT THE ACHIEVEMENT OF COMPLETE COMMUNITIES AND CITY BUILDING OBJECTIVES

Retailing plays a key role in city building by supporting the vibrancy of neighbourhoods and complete communities and by contributing to the amenity, interest and appearance of streets. There are eight key considerations in achieving this principle.

5.2.1 SUPPORT WALKABILITY

Community Level

Provide for a critical mass of retailing sufficient to meet convenience shopping needs within walking distance of most residences.

- Generally this can be achieved where there is a population of about 12,000-15,000 people living within about 800m of a “neighbourhood” shopping district (minimum 4,000 to 6,000 sq m of floor space oriented to the everyday needs of households). However, it should be noted that the relationship between market support and retail space is influenced by the specific neighbourhood’s demographic characteristics, other available markets (e.g. local employees), access to other alternative shopping options, etc. These factors are best evaluated in the context of a market study.
- Neighbourhoods with lower population densities will be more reliant on transit, car, taxi or bicycle use for everyday shopping.
- Smaller nodes with more limited ranges of convenience goods and services can partially address the need for some walkable shopping in lower density neighbourhoods.

Look for opportunities to shorten walking distances to commercial districts in neighbourhoods with curvilinear street patterns or large blocks. Provide pedestrian-scale lighting and other amenities to enhance the walkability of pedestrian routes.

Concentrate retail uses along transit routes or adjacent to transit stations.

Commercial District Level

Improve pedestrian access and safety in auto-oriented retail streets and mall redevelopments by providing improved sidewalks, landscaping and streetscape amenities, and by reducing points where pedestrians must cross vehicular traffic.

See Retail Design Manual for additional best practices, especially Section 2.1 – Sidewalk Interface.

Building Level

See Retail Design Manual. Most Sections include best practices that support walkability.

5.2.2 SUPPORT SOCIAL INTERACTION

Community Level

Locate community gathering places and services in commercial districts, including libraries, community centres, day care centres, etc.

Provide pedestrian open spaces for community programming, public art, seating, etc.

Commercial District Level

Where appropriate, activate laneways and parking areas for community use.

Where appropriate, develop programming and design public spaces to attract people throughout the week and during daytime and evening hours.

When redeveloping large retail sites such as shopping centres, provide a central focus in the form of courtyards or squares with publicly-accessible seating, trees and landscaping and space for community programming and events.

Retail Design Manual includes design-related best practices. Especially see Sections:

2.1 Sidewalk Interface

2.2 Hierarchy of Retail Frontages

Building Level

In larger developments, include public gathering spaces visible to and accessible from the sidewalk (for example, lobby areas of office towers and institutions).

Retail Design Manual includes design-related best practices. Especially see Sections:

2.1 Sidewalk Interface

3.1 Lighting

5.2.3 ENABLE A DIVERSITY OF COMMERCIAL USES

Community Level

Plan for convenient access within the community to a full range of shopping, leisure and community services.

Higher order commercial clusters and large-scale retail uses that attract customers from beyond the local neighbourhood should be located along transit routes and close to transit stations.

Commercial District Level

Plan for a range of lot and building floor plate sizes to accommodate a wide range of retail uses within the district.

Permit a wide range of uses supportive of commercial activity.

Where appropriate, permit multi-level commercial space.

Building Level

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.4 Storefront width to depth
- 1.5 Ceiling Heights
- 2.3 Contiguous Retail Frontages
- 3.4 Columns

5.2.4 ENABLE A HIGH DEGREE OF ACCESS AND CONNECTIVITY FOR ALL PEOPLE

Community Level

Extend key streets from surrounding neighbourhood into large retail sites.

Encourage intensification resulting in a sufficient density of people and jobs within a tightly defined trade area to support a critical mass of convenience shopping.

Also see strategies for supporting walkability (5.2.1).

Commercial District Level

Consider the accessibility needs of people arriving at the district by all modes of transport. Remember that once in the district, all shoppers become pedestrians.

- Provide for good pedestrian access from transit stops.
- Provide sufficient parking for car-driving customers within walking distance of stores.
- Provide generously sized landscaped sidewalks that meet AODA standards within parking areas and between parking and storefronts (also see 5.2.1).

Building Level

Encourage larger developments to incorporate public parking garages and bike storage.

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.3 Overhangs, Weather Protection & Awnings
- 2.1 Sidewalk Interface
- 2.2 Hierarchy of Retail Frontages
- 2.4 Entrances

5.2.5 SUPPORT PUBLIC SAFETY

Community Level

Provide community crime prevention programmes and adequate policing resources.

Commercial District Level

Avoid pedestrian – bicycle – vehicle conflict points.

Avoid dead end spaces and entrapment areas.

Provide for high visibility and good sight lines throughout the public realm.

Encourage diverse activities which will attract people throughout the week and during the day and evening hours.

Provide pedestrian-scale lighting in the public realm and in privately owned parking areas and walkways.

Building Level

Provide safe, visible, well-lit access to parking structures.

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.4 Storefront Width to Depth
- 2.1 Sidewalk Interface
- 2.4 Entrances
- 3.1 Lighting
- 3.3 Shipping & Receiving

5.2.6 ENCOURAGE HIGH QUALITY DESIGN TO SUPPORT ATTRACTIVE, DURABLE AND ADAPTABLE PLACEMAKING

Community Level

Include Official Plan policies, design guidelines and programs promoting and recognizing design excellence.

Commercial District Level

Include Official Plan policies, design guidelines and programs promoting and recognizing design excellence.

Building Level

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.1 Building Massing
- 1.2 Material Differentiation
- 2.1 Sidewalk Interface
- 2.4 Entrances

- 2.5 Display Windows
- 2.6 Identity, Branding and Signage
- 3.1 Lighting

5.2.7 HAVE REGARD FOR THE CHARACTER AND PHYSICAL, SOCIAL AND ECONOMIC CONTEXTS OF THE SITE

Community Level

Include Official Plan, urban design and heritage preservation policies that encourage area-specific guidelines recognizing the physical, social and economic characters of different neighbourhoods as it relates to retail.

Commercial District Level

Undertake area-specific assessments of physical, heritage, social and retail character and develop guidelines for enhancing and preserving key elements.

Building Level

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.1 Building Massing
- 1.2 Material Differentiation
- 1.3 Canopies, overhangs and awnings
- 1.5 Ceiling Heights
- 2.1 Sidewalk Interface
- 2.4 Entrances
- 2.5 Display Windows
- 2.6 Identity, Branding & Signage
- 3.1 Lighting

5.2.8 SUPPORT ENVIRONMENTAL SUSTAINABILITY AND RESPONSIBILITY

Community Level

Include City policies and programs supporting environmental sustainability and responsibility.

Commercial District Level

Encourage community leadership in promoting and implementing environmental sustainability and responsibility (e.g. pollinator-friendly streetscape planters and gardens).

Building Level

The Retail Design Manual best practices support environmental sustainability. Especially see Sections:

- 1.2 Material Differentiation
- 3.1 Lighting

5.3 SUPPORT LOCAL ECONOMIC DEVELOPMENT AND JOB GROWTH

The retail and consumer service sector is an important employer. Its vitality and growth is driven primarily by the buying power of Toronto residents, employees and businesses. Tourism and specialized shopping, entertainment and services for the surrounding region also are important in Toronto.

There are four key considerations in ensuring that local economic development benefits are maximized.

5.3.1 SUPPORT LOCAL JOB GROWTH

Community Level

Support local job growth by increasing opportunities for residents to shop within the community. Provide convenient access to shopping and consumer services meeting community's needs.

Increase opportunities for local neighbourhood residents to work close to home by nurturing vibrant commercial districts.

Support independent business growth. Independent businesses tend to source products locally to a greater extent than corporate chains and therefore can have a greater positive impact on the local economy. In addition, they support other local businesses that may be local (e.g., graphic designers, lawyers, accountants, delivery, etc.)

Commercial District Level

Support initiatives encouraging local businesses to hire local residents.

Building Level

Design spaces that meet the functional needs of retailers so that they can be successfully leased. Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.3 Storefront Width to Depth
- 1.4 Ceiling Heights
- 2.3 Contiguous Retail Frontage
- 3.4 Columns

5.3.2. ENCOURAGE LOCAL RESIDENTS AND EMPLOYEES TO SHOP LOCALLY

Community Level

Build partnerships with BIAs and other business associations and support “buy local” marketing programs. (also see Section 5.3.1).

Commercial District Level

Support BIA and other local community organization strategies and programs encouraging residents to shop locally (including branding, streetscape enhancements, marketing, festivals).

Building Level

Follow business practices that meet local consumer needs (e.g. operating hours, local delivery services, pick-up and drop off spaces, parcel pick-up).

5.3.3 SUPPORT THE PROSPERITY AND GROWTH OF LOCAL INDEPENDENT BUSINESSES

Community Level

Undertake economic development programs supporting small business formation and growth.

Commercial District Level

Support “pop-up” initiatives, temporary markets, retention and recruitment programs targeting independent businesses, etc.

Building Level

In larger developments, consider land use planning controls that are supportive of utilizing a portion of the floor space for micro-businesses.

Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.4 Storefront Width to Depth
- 2.3 Contiguous Retail Frontage
- 3.4 Columns

5.3.4 SUPPORT TOURISM AND EFFORTS TO ATTRACT CUSTOMERS FROM OUTSIDE THE LOCAL AREA

Community Level

Include distinctive retail experiences and districts in tourism marketing programs and visitor information services.

Support “tourism product development” initiatives that help distinctive retailing become “tourist-ready” (e.g. facilitating “tourism-readiness” education, tour development, bundled “packages”, etc.)

Commercial District Level

Develop tourism infrastructure (e.g. tour bus parking, information services) where needed and appropriate.

Support distinctive high quality architecture, heritage renovations and preservation, public realm; include gathering spaces; support event programming, etc.

Support the night time economy in appropriate districts with measures encouraging and attracting people during the evening and on weekends.

Building Level

Include design elements that enable distinctive retail, dining and entertainment experiences. Retail Design Manual includes design-related best practices. Especially see Sections:

- 1.1 Building Massing
- 1.2 Material Differentiation
- 2.1 Sidewalk Interface
- 2.2 Contiguous Retail Frontage

3.1 Lighting

3.4 Columns

5.4 PLAN FOR ADAPTABILITY

“The challenge is to design for long-life and loose-fit solutions that are robust enough to have a future beyond their original function. Flexibility and adaptability should be considered from the outset, so that developments are designed to be capable of refurbishment and conversion to other uses, particularly in the light of the implications of today’s social and technological change on future shopping trends”.

(-Government of Ireland, Department of Arts, Heritage and the Gaeltacht, Dublin Retail Design Manual (2012), p. 78).

How can commercial spaces adapt to accommodate future demographic and technological change without redevelopment? Considering resilience and adaptability is more critical now than in the past since change is occurring at an ever increasing pace as consumers and retailers embrace new technologies. Also, retail spaces in Toronto increasingly are being built within larger mixed-use buildings, making their reconstruction more difficult, disruptive and expensive.

Incorporating resiliency can increase design and construction costs in the short term. However, the long term pay-off in being able to lease to a wider range of tenants or add new MEP systems or technologies without extensive time delays or reconstruction may well make the additional expense worthwhile.

There are three key considerations.

5.4.1 ENABLE A DIVERSITY OF COMMERCIAL USES

Considerations were discussed in 5.2.3 above.

5.4.2. ENABLE THE INCORPORATION OF NEW TECHNOLOGIES

Community Level

Provide future-oriented municipal infrastructure such as high speed broadband internet, wi-fi, sensor technology, blue tooth, transportation innovations.

Commercial District Level

Provide wi-fi hotspots.

Accommodate “last mile” pick-up and delivery solutions for on-line shopping.

Incorporate charging stations in parking areas.

Building Level

Provide sufficient infrastructure for heavy internet use, video screens, sensors, etc.

Incorporate cell phone charging stations, on-line shopping pick-up services, etc.

Retail Design Manual includes design-related best practices. Especially see Sections:

1.5 Ceiling Heights

3.2 MEP

5.4.3 ACCOMMODATE FUTURE INTENSIFICATION

Community Level

Provide appropriate infrastructure and planning framework to support and encourage intensification.

Commercial District Level

In lower density commercial areas, anticipate future intensification in laying out circulation patterns, below grade infrastructure and building foundations (especially for large site redevelopment).

Identify areas where future intensification is likely to support additional retail space and the blocks where the new retail space should be clustered.

Building Level

In the blocks envisaged as future retail districts, design ground floors that can accommodate future retailing with minimal reconstruction even if there is insufficient market in the short term.

Refer to Retail Design Manual for best practices in designing a retail ground floor. Section 2.2 – Hierarchy of Retail Frontages – offers some suggestions for intensifying areas.

6.0 Case Studies: Key Observations

Ten retail development case studies were analyzed to illustrate how retail design supports retail success and to test the applicability of the principles discussed in Section 5. The case studies were selected to represent different building types, retail character, accessibility to transit and level of pedestrian activity. Four developments are located in Toronto and six in other cities in Canada, the U.S. and other countries. The list and selection criteria are summarized below.

Case Studies Index

Toronto

- 1 109 Ossington Ave.
- 2 438 King St. W.
- 3 4841 Yonge St. (Yonge/Sheppard)
- 4 QRC 134 Peter St.

Non-Local and International

- 5 The Rise, Cambie St., Vancouver
- 6 Suter Brook, Port Moody
- 7 Connaught, North Vancouver
- 8 Pearl District, Portland, US
- 9 Mandarin Gallery, Singapore
- 10 Mood, Stockholm

Criteria		Toronto				Non-Local and International					
		1.	2.	3.	4.	5.	6.	7.	8.	9.	10.
Building Type	Mid-Rise	×				×	×	×		×	×
	Tower / Podium	×	×	×	×				×		×
Retail Character	Retail			×			×		×		×
	Eating		×	×	×			×	×	×	×
	Entertainment		×		×				×		
	Local	×	×	×	×	×	×			×	
	Office			×	×	×			×		
	Side Street						×	×			
Access	Transit Oriented		×	×							
	Transit Adjacent				×	×	×		×	×	×
Pedestrian Activity	High		×	×					×		×
	Medium	×			×		×			×	
	Low					×		×			

* Integrates adaptive re-use of heritage building

Appendix 4 provides more information about each of the case studies and evaluates how they illustrate the design principles. The holistic lens is very important since it allows an assessment of the interconnectivity of the design elements and enables a discussion of success to move beyond purely aesthetic considerations.

It is important to note that primarily positive design elements of the case study buildings are identified. If other design elements of the case study building are not identified in the case study assessment the consultants felt that they did not support any of the principles listed.

The case studies demonstrate that the following considerations for building design elements support the achievement of the retail principles and retail success:

- Building massing and geometry is critical to the success of retail – whether through the use of volumes and material differentiation, colours, step backs, setbacks, canopies, architectural flourishes, heritage character, etc.
- Retail scale has to be proportionate to the street retail context.
- Choosing the primary retail frontage and treating it differently than the other sides of the building.
- Width to depth ratios: depends on the retail uses and retail character of the street. More traditional retail merchandise stores might prefer a 1:3 ratio (narrow and deep) for the purposes of merchandising along longer walls. Eating establishments may prefer wider frontages to allow more interactivity between the public realm and the seating areas. People in restaurants and bars want to “see and be seen”. Current retail trends are seeing a greater growth in eating establishments than in retail merchandise stores.
- Loading/receiving areas are completely internalized for larger retail developments versus semi-open loading areas for smaller developments.
- Columns: tall mixed use towers need to transfer the load to the exterior walls of the building to ensure better internal functionality of the retail space.
- Importance of outdoor space for people gathering: urban plazas, patios and outdoor retail merchandising allows for increased interconnectivity between the retail unit and people on the street.
- Placement of elevators to create usable retail depth to width ratios: residential circulation including elevator placement and loading areas can disrupt the ability to create good retail spaces that can expand and contract based on individual retailer demand.
- Lighting is critical to the success of retail as people are shopping more and more during the evening hours. Effective lighting both highlights the retail space from a distance and pulls people closer to see and experience the retail spaces up close.

Appendix 1

RETAIL DESIGN GUIDELINES FOR OTHER JURISDICTIONS - ANNOTATED BIBLIOGRAPHY

Summary

Fifteen retail development guideline manuals from eleven other jurisdictions were reviewed and analysed.

Commonalities:

- Most of the guidelines are directed at achieving objectives and principles.
- Most are highly visual with goals and best practices illustrated with photos and drawings. In some cases “don’ts” also are illustrated.
- The content of the guidelines are fairly similar. Most variations relate to their application to different development contexts (e.g. heritage main streets versus shopping centre sites).

Differences:

- All of the other guidelines address specific development contexts whereas the Toronto manual is to apply to all street-oriented ground floor retail development across the city.

ANNOTATED BIBLIOGRAPHY (ALPHABETICAL BY JURISDICTION)

1. **City of Calgary Planning, Development & Assessment Department; Large Retail Urban Design Guidelines (2016)**
<https://www.calgary.ca/PDA/pd/Pages/Planning-and-development-resource-library/Publications.aspx>
 - Guidelines apply to developments larger than 9,300 m² (100,000 s.f.).
 - Good organization of design guidelines under principles and big ideas.
 - Focus is on supporting city building principles. Economic development and retail functionality principles are not addressed.
2. **City of Calgary Planning, Development & Assessment Department, Downtown Retail District Strategy (2009)**
<https://www.calgary.ca/PDA/pd/Pages/Planning-and-development-resource-library/Publications.aspx>
 - A comprehensive study recommending a multi-pronged retail strategy for the downtown. Section 4, p. 77, discusses Urban Design Interventions.
 - Purpose is to improve some currently poor pedestrian experiences created by building design.
 - Doesn't address economic development or retail functionality principles.
 - Relevant to high rise/mid rise mixed-use environment.
 - Organized by building context: corners, mid-block, +15 Walkway, gateways and underpasses.
 - Focus is on ameliorating poor experiences created by existing buildings vs. design guidelines for new buildings.
3. **City of Cambridge ON (prepared by Brook McIlroy), Main Street Urban Design Guidelines, (2013)**
<https://www.cambridge.ca/en/build-invest-grow/resources/Main-Street-Urban-Design-Guidelines.pdf>
 - Intended to assist the City of Cambridge, landowners, businesses, developers and the public with clear tools to guide the design of heritage renovation and redevelopment projects in downtown Galt.
 - Guidelines are quite specific and heritage focused since they apply to a well-defined existing heritage main street.
 - Addresses city building from a heritage perspective.
 - Does not address economic development or retail functionality principles.
 - Good example of Developer Checklist for use in planning and reviewing applications (p. 49).
4. **Government of Ireland Department of Arts, Heritage and the Gaeltacht, Dublin Retail Design Manual (2012)**
<https://www.housing.gov.ie/sites/default/files/migrated-files/en/Publications/DevelopmentandHousing/Planning/FileDownload%2C30028%2Cen.pdf>
 - 10 principles are defined – all are broad city building considerations (e.g. “Have regard for the character and the physical, social and economic contexts of the site and its location”). Questions for developers and city officials to consider are provided under each principle.

- Manual is not prescriptive. Sets the objectives but doesn't address how they should be (or could be) achieved.
- Developers are to submit design statements indicating how they will meet the questions posed under each principle.
- Manual emphasizes the positive and gives examples of how each question might be addressed.
- Case studies are used to illustrate how the principles have been addressed in specific projects.

5. Town of Gravenhurst (prepared by Stempski Kelly Associates) Gravenhurst Streetscape and Façade Guidelines (2013)
<https://www.gravenhurst.ca/en/doing-business/resources/Community-Improvement-Plan/StreetscapeDesignGuidelines.pdf>

- Focuses on streetscape plan and guidelines.
- Community members rated images of different building facades.
- Very general.

6. University of Oregon, Sustainable Cities Initiative, Gresham Oregon Review of Large Scale Retail Design Standards and Development Principles (2010)
<https://scholarsbank.uoregon.edu/xmlui/handle/1794/10723>

- Summarizes Gresham's efforts to shape the design of large scale retail so that it better supports 5 city-building principles (accessibility, public space, human scale, safety and sustainability).
- Provides questions for planners to ask when reviewing development for each principle which is similar to the Dublin approach.
- Very high level and general.
- Does not address economic development or retail functionality principles.

7. City of Gresham Downtown Design Guidelines and Standards (2015)
<https://greshamoregon.gov/WorkArea/DownloadAsset.aspx?id=1814>

- All land uses in the downtown are addressed.
- Provides guidelines to achieve city-building principles (Provide a Vibrant Mix of Uses; Promote Excellence in Design, Create a Vibrant Public Realm and Create Strong Connections Between Districts).
- Guidelines are similar to those used in other jurisdictions. Developers are permitted to choose from a selection of possible strategies.
- Does not address economic development or retail functionality principles.

8. Transit for London, (U.K.) Retail Design Standards for Tube Stations (2015)
<http://content.tfl.gov.uk/retail-design-standards.pdf>

- Purpose is to guide the design of retail units in Tube stations.
- Goal is to provide consistency while still being sensitive to design and context of individual stations.

- Good use of good and bad example photographs to illustrate principles.
- Detailed content is more applicable to enclosed shopping centre environments than to ground floor retail interface with public street.
- Does not address economic development or retail functionality principles.

9. New York City, Department of Housing Preservation and Development, “Laying the Groundwork” (2015)

<https://www.cambridge.ca/en/build-invest-grow/resources/Main-Street-Urban-Design-Guidelines.pdf>

- Purpose is to strengthen the City’s and the not-for-profit sector’s expertise in designing retail and community facility ground floor spaces in mixed-use developments.
- The Manual codifies a set of guidelines that capture best practices for mixed-use projects.
- Addresses tenant needs (retail functionality) and city building in the context of encouraging ground floor convenience retail and community services in small scale mixed use development.
- Provides clear and concise specific guidelines.

10. City of Ottawa Urban Design Guidelines for Large Format Retail (2006)

<https://ottawa.ca/en/urban-design-guidelines-large-format-retail>

- Purpose is to provide urban design guidance at the planning application stage.
- Applicability is limited to large format retail development in mainly suburban context. Planning goal is to enable future intensification.
- Addresses city-building objectives.
- Does not address retail functionality or economic development objectives.

11. City of Ottawa Urban Design Guidelines for Development along Traditional Mainstreets (2006)

<https://ottawa.ca/en/urban-design-guidelines-large-format-retail>

- Purpose is to provide urban design guidance at the planning application stage to better ensure compatibility with pedestrian orientation and compact built-form typical of traditional main streets.
- Guidelines address city-building objectives.
- Does not address retail functionality or economic development objectives.

12. City of Ottawa Urban Design Guidelines for Development along Arterial Mainstreets (2006)

<https://ottawa.ca/en/urban-design-guidelines-large-format-retail>

- Purpose is to provide urban design guidance at the planning application stage to improve the pedestrian environment and appearance of the streetscape while facilitating the gradual intensification of these areas.
- Guidelines address city-building objectives.
- Does not address retail functionality or economic development objectives.

13. Philadelphia City Planning Commission, Design Guidelines for Commercial Façade Improvements (2006)

<https://www.phila.gov/CityPlanning/resources/Publications/designguide.pdf>

- Addresses city-building considerations for facades in traditional main streets.
- For each building element, guide lists and illustrates “recommended” and “not recommended” treatments.
- Reads like a straightforward guide for small property owners; avoids jargon and technical information; keeps it simple.
- Does not address retail functionality or economic development objectives.

14. San Francisco City Planning Department, Commission Guide for Formula Retail (2018)

http://default.sfplanning.org/publications_reports/FormulaRetail_Commission_Guide.pdf

- Includes both when and where chain stores (formula retail) should be permitted and how they should be designed.
- Focus is on integrating chain stores into traditional main streets.
- Good way of illustrating “recommended” and “not recommended” examples.
- Emphasizes visual compatibility; does not address economic development or retail functionality considerations.
- Façade and storefront design guidelines are extremely specific and prescriptive, perhaps more suitable for individual heritage areas.

15. Historic Environment Local Management, UK, Retail Development in Historic Areas (2005)

http://www.historictownsforum.org/files/documents/free_download_publications/Retail_Development_in_Historic_Areas.pdf

- Analyses 10 case studies of successful integration of new large scale retail developments in historic UK city centres.
- The design principles which the case studies have in common are summarized. Compatible with findings in other more specific manuals.
- Focus is on maintaining distinctiveness of heritage context while enabling retail development.
- Does not address retail functionality or economic development considerations.

Appendix 2

PLANNING CONTEXT REFERENCES

City-Wide Regulations and Guidelines

Avenues and Mid-rise Buildings Study and Performance Standards

<https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/design-guidelines/mid-risebuildings/>

Boulevard Café and Marketing Display Regulations: Chapter 742 of the Toronto Municipal Code

<https://www.toronto.ca/legdocs/municode/toronto-code-742.pdf>

Toronto Sign By-law: Chapter 694 of the Toronto Municipal Code

https://www.toronto.ca/legdocs/municode/1184_694.pdf

Complete Streets Guidelines

<https://www.toronto.ca/services-payments/streets-parking-transportation/enhancing-our-streets-and-public-realm/complete-streets/complete-streets-guidelines/>

Vibrant Streets: Toronto's Coordinated Street Furniture Program (updated July 2012)

https://www.toronto.ca/wp-content/uploads/2017/11/96e3-Vibrant_Streets-Documents.pdf

Toronto Bird Friendly Development Guidelines (2017)

<https://web.toronto.ca/wp-content/uploads/2017/08/8cd7-Bird-Friendly-Development-Guidelines.pdf>

Tall Buildings Design Guidelines (2013)

<https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/design-guidelines/tall-buildings/>

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Agincourt Mall Official Plan Amendment (3850 and 3900 Sheppard Ave. E. and 2350-2362 Kennedy Rd) (2019)

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<https://www.toronto.ca/city-government/planning-development/planning-studies-initiatives/bloor-west-village-avenue-study/information-reports-bloor-west-village-avenue-study/>

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<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2019.TE7.59>

Dufferin (401 to Lawrence) Secondary Plan and Urban Design Guidelines Parts 1, 2, 3 and 4 (Oct-Dec 2015)

<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2015.NY10.42>

Dundas West and Roncesvalles Built Form Study and Official Plan Amendment (2018)

<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2018.TE34.9>

Golden Mile Secondary Plan Study (2019)

<https://www.toronto.ca/city-government/planning-development/planning-studies-initiatives/golden-mile-secondary-plan-study/golden-mile-secondary-plan-study>

Mimico by the Lake Secondary Plan (2013)

<https://www.toronto.ca/legdocs/mmis/2013/ey/bgrd/backgroundfile-57052.pdf>

Mirvish Village Development (Official Plan and Zoning By-law Amendments for 571-597 Bloor St. West, 738-782 Bathurst St., 26-38 Lennox Ave. and 588-612 Markham St (2017)

<https://www.toronto.ca/legdocs/mmis/2017/te/bgrd/backgroundfile-102235.pdf>

North York Secondary Plan (2017)

<https://www.toronto.ca/wp-content/uploads/2017/11/8fe9-cp-official-plan-SP-8-North-York-Centre.pdf>

Sheppard West Dublin Secondary Plan (2017)

<https://www.toronto.ca/wp-content/uploads/2017/11/97a8-cp-official-plan-SP-23-SheppardWestDublin.pdf>

TOcore Retail and Service Commercial Land Use Study (Dec 2015)

<https://www.toronto.ca/wp-content/uploads/2018/05/9092-city-planning-tocore-retail-service-commercial-study-dec-2015-AODA.pdf>

Yonge Eglinton Secondary Plan (2018)

<https://www.toronto.ca/wp-content/uploads/2018/05/970b-2018-05-18-Final-OPA-and-YESP-combined-AODA.pdf>

Heritage Conservation Districts

<https://www.toronto.ca/city-government/planning-development/heritage-preservation/heritage-conservation-districts-planning-studies/>

Kensington Market Heritage Conservation Study (2017)

<https://www.toronto.ca/legdocs/mmis/2017/pb/bgrd/backgroundfile-107023.pdf>

<https://www.toronto.ca/legdocs/mmis/2017/pb/bgrd/backgroundfile-107024.pdf>

Queen Street West Heritage Conservation District Plan (2006)

<https://www.toronto.ca/legdocs/mmis/2007/te/bgrd/backgroundfile-5172.pdf>

West Queen Street West Heritage Conservation Study (2017)

<https://www.toronto.ca/legdocs/mmis/2017/pb/bgrd/backgroundfile-105301.pdf>

Historic Yonge Street Heritage Conservation District Plan (2016 - under Appeal)

<https://www.toronto.ca/legdocs/mmis/2016/te/bgrd/backgroundfile-88803.pdf>

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Photo: Northeastern University

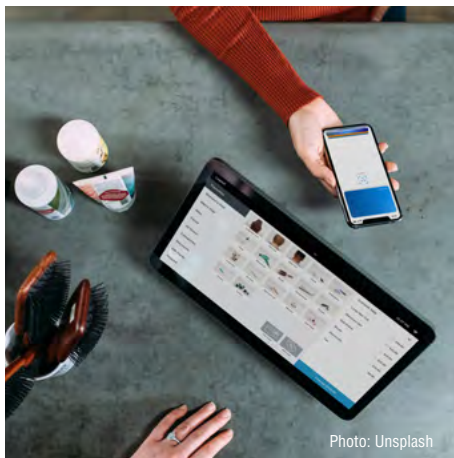
Appendix 3

DRIVERS OF RETAIL CHANGE

Retailing is subject to constant change and transformation. We identify several drivers of change that are impacting the industry and highlight their implications for retail design and development. The drivers are grouped into three themes: (a) changing consumer shopping behaviours and technology; (b) new retail experiences; and, (c) retail and community building. It is important to note that these selected drivers are all interrelated, and there is no one single driver that will define the future of retail. The drivers may impact retail businesses in different ways, over different time frames and to varying degrees. As a result, successful retail design and development guidelines need to be both flexible and adaptable to meet the needs of a broad spectrum of retailers to create vibrant and viable retail spaces for the community over the long-term.



Photo: Unsplash



A. CHANGING CONSUMER SHOPPING BEHAVIOURS AND TECHNOLOGY

Customer Journeys in an Omni-Channel Environment

Customer Journeys as the New Norm

Retail as Distribution – Getting the Product to the Consumer

Technologically-Immersed and Empowered Consumers

Mobile Retail as Key to Customer Journeys

Retail Sensors and Surveillance, Big Data and Artificial Intelligence (AI)



B. NEW RETAIL EXPERIENCES

Experiential Retail, Personalization and Curation

From Transactional to Experiential Retail Space

Animating Urban Spaces with Pop-Up and Modular Retail

Temporary Retail as a Permanent Retail Model

Food Experience and Hyper-Local Food Concepts

From Food Trucks to Retail Stores with Restaurants



C. RETAIL AND COMMUNITY BUILDING

Integrating Retail Diversity

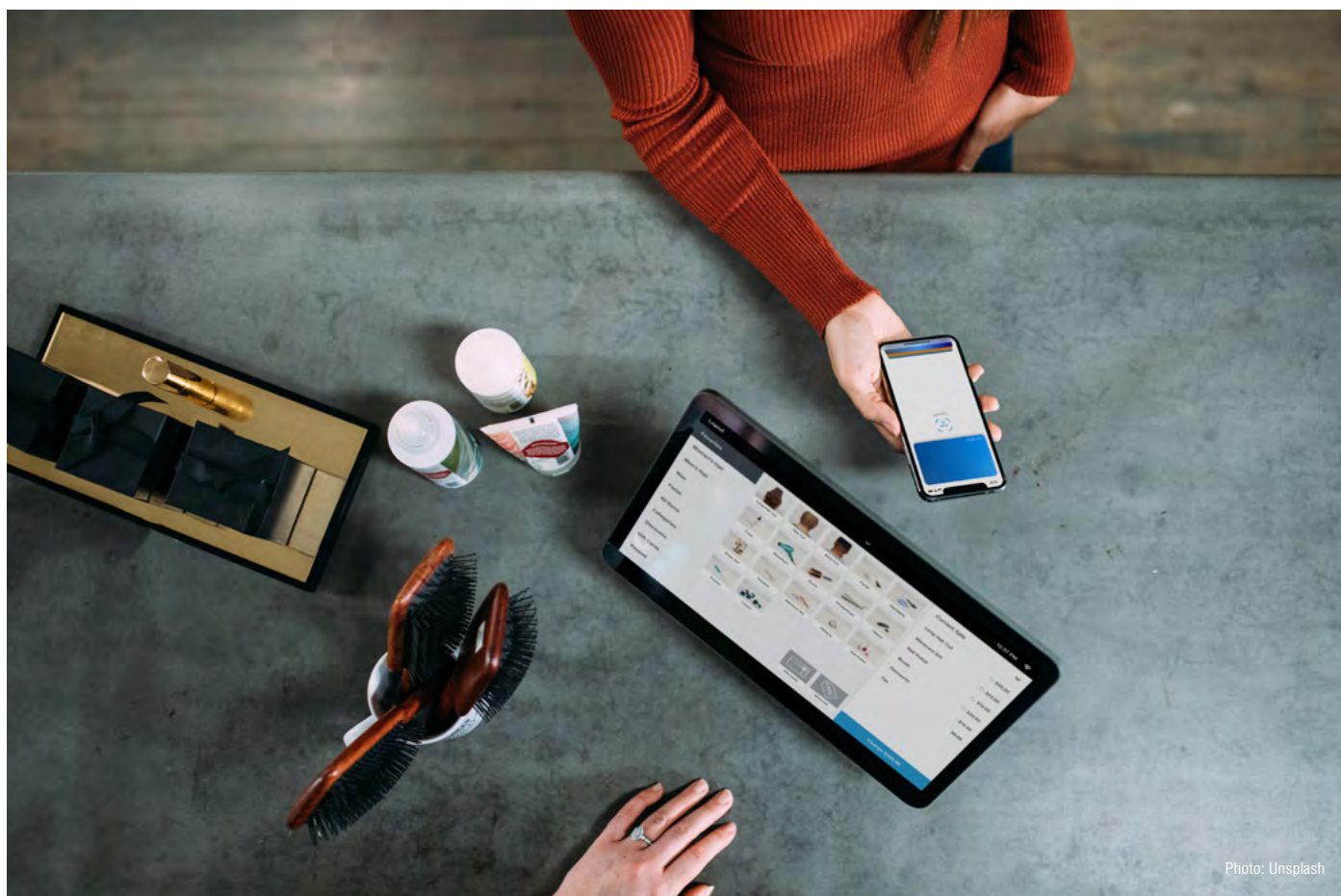
Localization and Space Needs

The Importance of Convenience and the 24/7 Economy

Convenience, Open All Hours and Walkable Density

Sustainability, Sharing and the Circular Economy

Ownership meets Sustainability



A. CHANGING CONSUMER SHOPPING BEHAVIOURS AND TECHNOLOGY

Customer Journeys in an Omni-Channel Environment

Trend Description: *Customer Journeys as the New Norm*

- Consumption is now just part of the integration of life – work, live, play, shop, learn and experience. We are constantly exposed to consumption opportunities – in both physical and virtual spaces.
- Purchase behaviour is increasingly viewed as an interconnected circular journey as opposed to the traditional linear purchasing funnel/path.
- These journeys are defined by a series of purchase ‘moments’: from considering and evaluating, deciding and buying, and post-purchase activities.
- Technological innovation and omni-channel retailing provide the vehicle for the journey.
- Mobile technology may be used throughout the customer journey (e.g., showrooming, webrooming, checking consumer reviews, price comparison, checking inventory, delivery options and status).
- Customer journeys can be used to understand our retail and service behaviours.

Why is it Relevant?

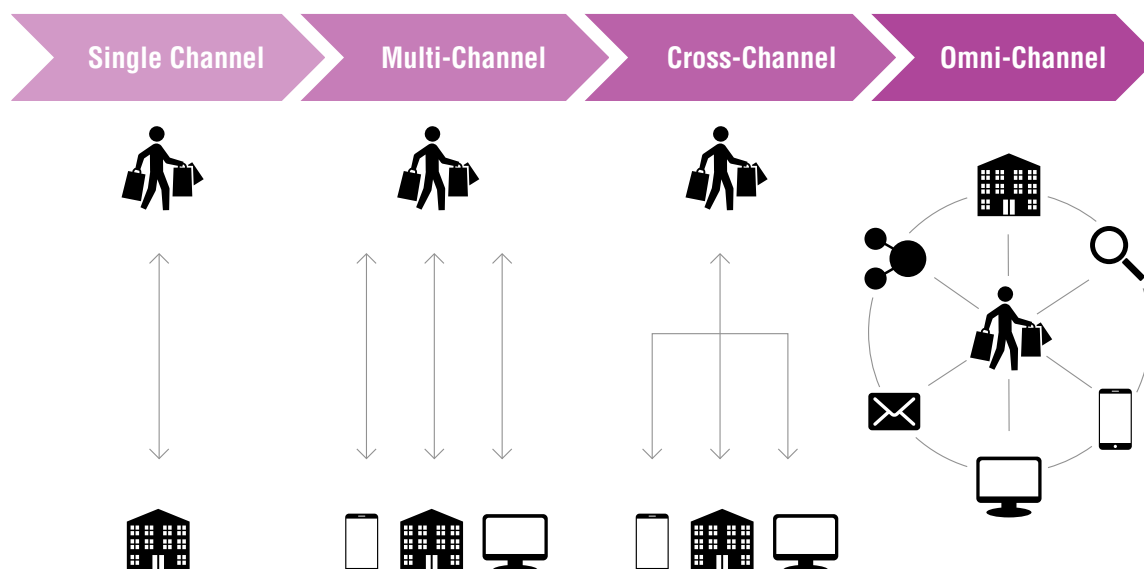
- The key to successful retail spaces and places will be to add value throughout the journey, enriching moments and providing the right mix and level of customer experience.
- Shopping districts can both influence the journey and act as key 'physical' community building and experiential stopping points as opposed to solely retail destinations serving transactional needs.

Implications for Retail Design and Development

- Shopping district boundaries are being blurred between all aspects of life as all our lives become increasingly integrated between work, shop, play, learn and experience.
- Streets and shopping districts have to appeal to consumers from a design perspective to maximize experiential needs.
- Design should be used to frame, enhance and reinforce customer experience and create positive moments.
- Despite technological immersion, there is an increased importance on shopping as a social function and form of community.
- People attract people – What are the design characteristics of plazas and public areas that attract people? What can retail designers include in their design development to maximize attraction?
- There is a need to 'best' position the shopping district to provide meaningful and memorable moments. The positioning is executed in part through design elements and the interface between design at varying spatial scales (e.g., community, neighbourhood, street/block, property).

Customer Journeys

Omni-channel and frictionless retail: customers expect to interact with businesses in a seamless manner across their preferred channels





Trend Description: *Retail as Distribution – Getting the Product to the Consumer*

- A range of new concepts that bring goods and services to the consumer.
- Evolving delivery options and business models (e.g., Amazon Prime, UberEats, Foodora, Canada Post pick-up points, retailers offering multiple collection points beyond their store networks).
- Buy online pick-up in-store (i.e., click-and-collect), custom online fulfilment delivery and storage concepts.
- The importance of the last mile as it is a major point of friction and consumer frustration (from missed deliveries and re-scheduling inefficiencies to porch piracy, i.e., the theft of products left at the doorstep).
- Reduced delivery time expectations, from weeks, to days, to same day, to within hours.
- Automation of delivery on the near horizon (driverless vehicles, drones).
- Growth of online retail is the key driver increasing the volume of deliveries.
- Important to note the delivery is not a one-way activity, The return of products ordered online adds significantly to the volume of deliveries. This may lead to negative environmental impacts of deliveries, returns, and packaging, such as congestion, air pollution, increased carbon footprints.

Why is it Relevant?

- Retailers are investing in improving delivery capacity and efficiencies, and partnering with a growing number of specialist delivery companies.
- Delivery options continue to evolve embracing technology including robots, self-driving vehicles, drones, pick-up stations.
- Changes the function of bricks-and-mortar retail spaces to concept stores, showrooms, logistics and warehousing centres.
- Distribution requires space. It is no longer viewed as traditional transactional retail space.

Implications for Retail Design and Development

- Location, location, location is still a key determinant in retail decision making.
- Clustering of retail stores remains a required design element that makes increased density of residential, office, and students within 800m of the retail district that much more important.
- More retailers are integrating delivery options into their store designs (e.g., click-and-collect counters and online kiosks).
- While these new models of delivery are disrupting some traditional retail sales, they still tend to be the exception.
- The vast majority of retail sales and delivery takes place in store (as of 2018, 92% of retail sales were made in-store).

(source: Invesp, Statista)



Photo: Unsplash

Examples: Retail as Distribution – Getting the Product to the Consumer



For goods and services, the retailer will now go to the customers 24/7.



The concept of click-and-collect and other storage type pick-up facilities offers convenience. To combat the lack of impulse buying with these concepts retailers often provide discounts if they pick-up in store.



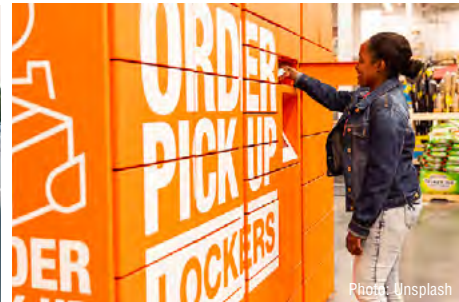
There are many hurdles before drone delivery becomes common but it is on the horizon.



Robots used for delivery are similar to drones.



Using fleets of self-driving vehicles combined with delivery robots makes the logistics of delivery efficient.



The “last mile” of moving the product to the customer can be the most costly and fragmented part of the purchase. Allowing the stores to be distribution centres reduces costs and increases in-store experience.



Canada Post concept store in Richmond Hill: 24 hour self-serve shipping, with fitting rooms for ease-of-return.



Canada Post concept store in Richmond Hill: drive through parcel pick-up providing added convenience to omni-channel parcel collection.



Penguin Pick-Up. Specialist collection point meeting needs of consumers in high density urban environment.

Technologically-Immersed And Empowered Consumers

Trend Description: *Mobile Retail as Key to Customer Journeys*

- An increasing share of time is spent on mobile devices, and mobile payment has been growing rapidly, further embedding mobile technology within our daily consumption habits.
- Mobile technology is used throughout customer journeys in physical and virtual spaces.
- Mobile retail is a leading priority for major retailers.
- 'Empowered' consumers that are fully immersed in mobile technology are the current innovators that will become the norm in the near future.

Why is it Relevant?

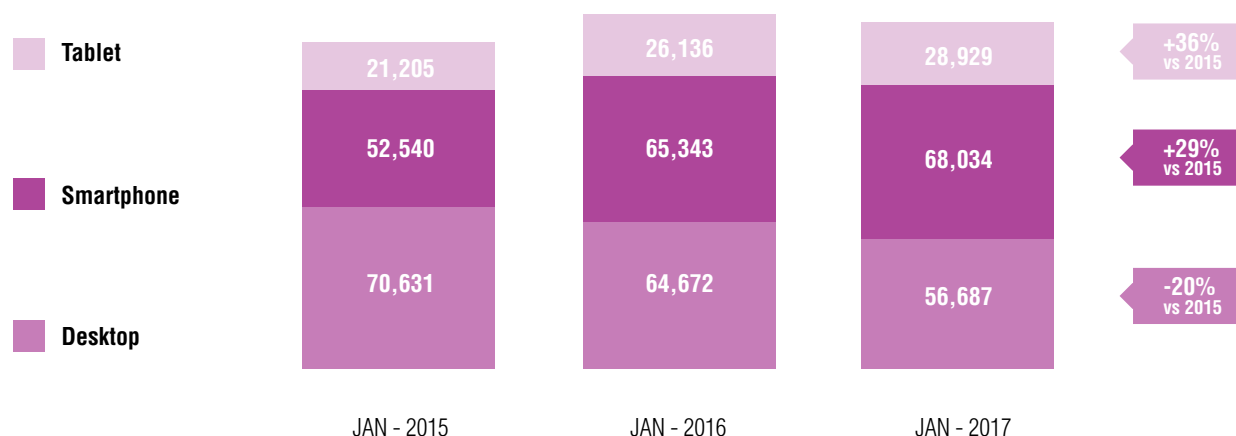
- Mobile technologies provide consumers with access to many 'choice' options on their customer journeys that impact when, where and how they shop.
- Mobile devices are a major source of data and insight on consumption habits and location preferences for retailers, shopping centre owners and major tech firms.

Implications for Retail Design and Development

- Mediocre retail businesses and undefined retail districts will find it increasingly difficult to survive in an environment of technologically empowered mobile consumers.

Amount of Time Spent By Device

Source: ComScore, 2017 (Trending Now - Retail)



Trend Description: *Retail Sensors & Surveillance, Big Data and AI*

- The use of sensors and beacons can and will be used by retailers for store design as well as other uses such as marketing and promotions.
- The range of big data on consumers gathered by companies, such as, Google, Facebook, LinkedIn, Twitter and Instagram provides key insights into consumer behaviour and allows businesses to curate products and store designs specifically for them.
- Big data coupled with artificial intelligence (AI) allows retailers to anticipate the wants and needs of consumers even before they know they want it.
- Other technology platforms such as the Internet of Things (IoT), cashier-less checkout, auto fulfillment, cryptocurrency (e.g., Bitcoin), and Blockchain have impacted retailers including store design and development.
- Increased use of technology in retail related to supply and logistics, customer experience, payment, safety/security, tracking, etc.
- Privacy issues and the appropriate use of data are a key concern with sensors and surveillance technologies that gather data about individuals.

Why is it Relevant?

- To remain competitive, there will be a growing need for smart city infrastructures that securely serve the connectivity needs of residents, workers and visitors.
- Companies such as Uber, Lyft, Airbnb, Amazon, and Honk have disrupted the traditional industry and created new industries and ways of living.
- Technological connectivity and associated surveillance extends beyond e-commerce to encapsulate all parts of our lives.

Implications for Retail Design and Development

- Allows for monitoring behaviour related to customer journeys, such as dwell time, number of transactions, basket size and return frequency which can impact store design and main street block planning – e.g., layouts, merchandising, customer flow inside the store, window display monitoring, safety and shrinkage.
- Large amounts of data that can be used to build customer profiles, undertake segmentation analysis, and customize product offerings that impacts store design. Delivering better experiences through physical and digital design.

Examples: Retail Sensors & Surveillance, Big Data and AI



Photo: Google

Sensor technology has enabled self-driving vehicles reducing the need for parking lots/garages but also enabling increased delivery options. For goods and services, the retailer will now go to the customers 24/7.



Photo: Samsung

Products such as refrigerators that can monitor usage and inform you when you are low on items or will also order them directly from the online store (fulfillment) e.g., Alexa from Amazon.



Photo: Amazon

Amazon pervades all aspects of our lives from shopping to home assistance.

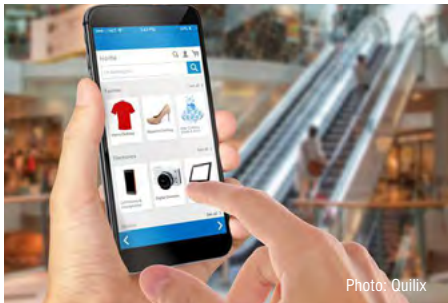


Photo: Quillix

Using sensors lets you know when you are approaching a retailer and allows you to pre-order items that will be ready for you to pick up in just a few moments.



Photo: Sidewalk Labs

City building is embracing sensor technology for sidewalk condition monitoring including melting snow, temperature, watering plants, garbage/waste, energy usage, and a whole host of other initiatives.



Photo: Walmart

Retailers can use sensors to monitor inventory in real time, shrinkage, and other functions.

For retail districts you can monitor customer journeys and cross-shopping.



Photo: Unsplash

Social media platforms monitor behaviour and create profiles of consumers.



Photo: Unsplash

Some public spaces and shopping centres have embraced providing free Wi-Fi and other Apps (e.g., weather channel) as a way to collect data and understand customer visitation, customer journey, dwell time, and response to promotions related to social gathering and community building.



Photo: Mastercard

Programs such as Mastercard and Moneris Analytics provide insight into transactions, basket size, and conversion rates.



Loyalty cards monitor shopping behaviour in exchange for rewards.



Consumer demand online and bluetooth connectivity in shopping centres, retailers, and on main streets as part of the integrated living concept.



The largest accommodation company does not own any real estate. You can have Airbnb inspired and designed spaces by retail companies such as West Elm.



Bluetooth connectivity technology is being used instead of Wi-Fi – here it is used at gateways to a central business district to gather information on shopping behaviour drones.



Artificial intelligence has many uses but at first they are being used by large format chain retailers as part of customer engagement, payment and ordering.

Other initiatives such as virtual and augmented reality are being used to transform the shopping experience.



Blockchain is a permanent ledger of transactions and can be part of secured payment transaction that helps to eliminate counterfeit products. Cryptocurrencies such as Bitcoin are gaining acceptance as a way to avoid high transaction costs. Others such as WeChat, and AliPay are gaining prevalence.



B. NEW RETAIL EXPERIENCES AND CHANGING SPACE NEEDS

Experiential Retail, Personalization and Curation

Trend Description: *From Transactional to Experiential Spaces*

- Move away from purely transactional stores to hybrid transactional-experiential stores.
- In particular, shift to the "Concept" store format that has a curated selection and is more experiential.
- Omni-channel has been a key aspect of this shift, with retailers allocating store space to service the needs of their online customers (e.g., online kiosks, collection areas and showrooming).
- Product offerings that not only connect with consumers but also define the retailer.
- An effective merchant selects the best products they can to create a coherent offer.
- Curated retail has been a trend for many years and looks set to continue. What has changed is the consumer's ability to access goods across a range of channels and from much wider variety of sources.

Why is it Relevant?

- Retailers are increasingly looking to add more experiential elements to their retail offer.

Implications for Retail Design and Development

- Retail spaces should be flexible and adaptable to embrace these and future trends in retail design and zoning.
- Landlords and property managers should not be so rigid in retail leasing and exclusivity clauses that preclude new ideas. Similarly, municipalities should not be so rigid in retail use and function zoning.

Examples: *From Transactional to Experiential Spaces*



Photo: Quadrangle

Samsung store offers a place to experience different products with no inventory.



Photo: Vans

Vans, active clothing retailer, concept store in London, UK, built around BMX skate park concept.



Photo: Indochino

Men's suit designer, Indochino store has no inventory. Everything is made to measure and customized for a one-of-a-kind experience.



Photo: GlobalBlue

2nd Home, in Germany, is a store designed with a home setting.



Photo: Nike

Nike Live concept store in Los Angeles, features products that are most popular amongst local shoppers with fast changing inventory.



Photo: Dezeen

Bilder & de Clercq, Netherlands, grocery store concept arranged by meal rather than food category.

Animating Urban Spaces With Pop-Up And Modular Retail

Trend Description: *Temporary Retail as a Permanent Retail Model*

- Pop-up retail is widespread and can be defined in many different ways.
- Types of pop-up include: communicational, experiential, transactional, testing, institutional.

Why is it Relevant?

- Retailer perspective: Low-risk business launch, experimentation and testing, transition from e-commerce to bricks-and-mortar, awareness, advertising, word-of-mouth, publicity, face-to-face interaction with the brand, excitement due to temporary nature of the pop-up and the associated perception of scarcity.
- Landlord perspective: occupy unleased space, activate problem vacancy, differentiation, increase traffic, marketing for current tenants, add experiential aspects to shopping, variety & excitement, entice potential new tenants.

Implications for Retail Design and Development

- Pop-ups can be used to animate streetscapes.
- Curation of pop-up, e.g. clusters/zones, seasonality, interaction with public space.
- They are a form of temporary tenancy and subject to fluid design elements.
- Include modular retail designs.

Examples: *Temporary Retail as a Permanent Retail Model*



IKEA play cafe.



Indulge Food pop-up concept at Yorkdale.



STACKT shipping container market at Bathurst Street and Front Street in Toronto.



Photo: Unsplash

Food Experience And Hyper Local Food Concepts

Trend Description: *From Food Trucks to Restaurants in Retail Stores*

- A growing number of eating establishment concepts that are unique to their local neighbourhood.
- Food is an important aspect of successful retail, being seen as key point of differentiation within the retail industry.
- Broad range of food options, from mobile food trucks, pop-up food kiosks, food halls to food integrated within retail (e.g., bar and restaurant in Nordstrom or restaurants within grocery stores).

Why is it Relevant?

- Following the growth of culinary education facilities across Canada, new graduates are eschewing traditional hospitality jobs and are partnering with small food producers to drive eating establishment concepts.
- New eating establishments want to be customized to each neighbourhood by unique differentiators.
- A note of caution related to the growth of food services and the potential oversaturation in some markets as developers and landlords seek out food service concepts as a way to insulate themselves from the impacts of e-commerce.

Implications for Retail Design and Development

- Design incorporates smaller spaces to test innovative ideas.
- Locally sourced eating establishments and other concepts such as organic will have more frequent small truck deliveries, refrigerated delivery space, more waste, increased need for refrigerated waste storage.
- Design may include places to grow produce on site (e.g., roof top gardens, apiaries).

Examples: From Food Trucks to Grocerants



Photo: Restaurant de Kas

More eating establishments are increasingly sourcing local products more and growing produce on their premises. Restaurant de Kas, Netherlands, is a restaurant in a greenhouse.



Photo: Toronto Food Trucks

New food hall venues, food trucks, and shipping container pop-ups allow new eating establishments to incubate with less start-up costs.



Photo: Jamie Kennedy

Branded estates are communicating to patrons about where their locally sourced food is coming from.



Photo: George Brown

Culinary schools provide a great pool for recruiting the next top food concept.



Photo: Susie Koekerscheidt

Eataly 'grocerant' store concept in Boston includes learning with experiential elements.



Photo: Eataly

Eataly 'grocerant' store concept in Boston includes learning with experiential elements.



C. RETAIL AND COMMUNITY BUILDING

Integrating Retail Diversity

Trend Description: *Localization in Retail and Service in Community Building*

- In retail's competitive landscape, differentiating by way of adding community building elements can be a successful strategy.
- No longer are retailers just one thing (e.g., a shoe store that only sells footwear).
- Localization, adapting to the local market, is a major retail trend albeit a challenge for major retailers and global retail brands.
- 'Local' in food retail and service is most often related to sourcing of product, links to sustainability.
- Localization often promotes diversity, encourages local innovations, and is used as a point of differentiation for independent business and increasingly, chain stores.
- Localization provides a way to better understand and cater to consumer needs, deepen consumer connection, drive higher retention and consumer loyalty and provide a foundation for longer-term sustainable competitive advantage.

Why is it Relevant?

- An increasing number of businesses are looking to tailor their concepts and design to locality.
- Store sizes have begun to decrease – but not for all categories.
- Food and beverage: apart from some stores such as Costco, the trend is towards smaller, nimbler grocery stores.
- Farm Boy and Organic Garage are likely to expand across the Canadian marketplace. Loblaw's ownership of Shoppers Drug Mart allows them entry into the small grocery store format across wide markets, and to offer expanded click-and-collect options for their customers.
- For clothing and accessories stores, smaller sizes reflect stores allocating less space to back of house and inventory and becoming more showrooming centres.
- The larger 25,000 to 45,000 square foot gyms and fitness centres are being replaced by 10,000 to 15,000 niche fitness centres and smaller boutique fitness operations.
- Some food services are trending smaller to allow more choice, less build out costs, and increased innovation. However, there are examples of very large format eating establishments.

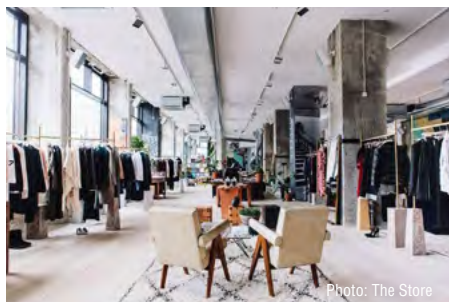
Implications for Retail Design and Development

- Engaging in design and concepts that build community allows a retailer to gain increased trust and dwell time and therefore increased sales.
- Retail space should be flexible and adaptable to embrace these and future trends in retail design and zoning.
- Landlords and property managers should not be so rigid in retail leasing and exclusivity clauses that preclude new ideas – consumers are looking for a mix of retail and services firms to meet their needs.
- Design incorporates smaller spaces to test innovative ideas.
- Operating expenses and pressure from online retail have forced many retailers to do more within a smaller well-designed space.
- Retail design should reflect the local neighbourhood or shopping district's identity and vision and be supportive of the community.

Examples: Localization in Retail and Service in Community Building



Barber shop that offers alcohol and gaming has become a cool hang out place for men.



The Store, Berlin, concept store that combines curated collections, café, and places for tables for workers to create and meet co-workers and clients.



Frank and Oak offers men's clothing, a barber shop, and café in a social gathering atmosphere.



Peloton concept combines fitness, at home, social gathering, cafes and bikes sales.



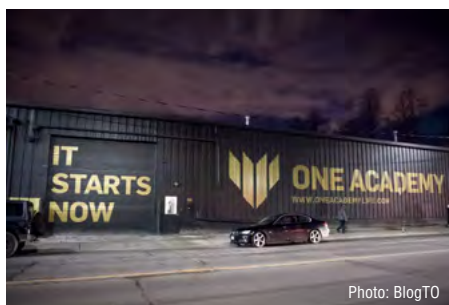
Restoration Hardware's concept store in New York blends a rooftop café and socialization into the store.



Farm Boy Urban (19K s.f.), urban store concept.



Sobey's Urban Fresh (4.5K s.f.) urban store concept.



One Academy Fitness (10K s.f.) niche fitness concept.



MiniSo (1.5K s.f.), mini lifestyle goods department store.

The Importance of Convenience and the 24/7 Economy

Trend Description: *Convenience, Open All Hours And Walkable Density*

- Convenience a major driver for retail and specifically, the retail main street environment.
- Time-pressured lifestyle has created an increased demand for convenience and frictionless shopping experiences – with customers expecting to have retail and service experiences on their terms.
- Increased population density thresholds for convenience based shopping and complete street development, especially near transit, is a key goal to create a captive target market of consumers for the retail.
- Consumers in major urban markets are now conducting a major component of their shopping after 6 pm in the evenings, and omni-channel shopping takes place 24/7.
- Store operating hours vary markedly by business type. There has been growing pressure on businesses to operate beyond the bounds of the traditional business day, especially with the widespread adoption of omni-channel. For example, retail businesses in the PATH are staying open later in the evening.

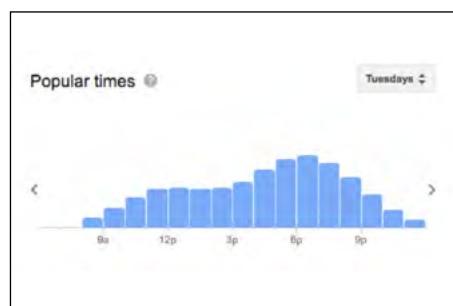
Why is it Relevant?

- New retail developments will find it difficult to compete on price and selection.
- To compete, local neighbourhood retailers will want to locate in areas with a density of residents and daytime traffic to support local shopping.
- Location and retail development strategies need to support healthy and active living and meet people's need for daily living.
- The shift to community-based and local serving retail requires a threshold population density to ensure a constant supply of customers to support businesses. These businesses will be more immune to outside forces if they are locally focused.
- Generally, consumers do not want to travel more than 5 to 10 minutes (by foot, bike, transit, or by vehicle) to get their local neighbourhood goods and services. This matches the residential build out parameters of the Avenue and Mid-Rise density goals along a typical 800 m to 1000 m main street or within a 5 to 10 minute walking distance.
- The type of retail street should help dictate the retail design.

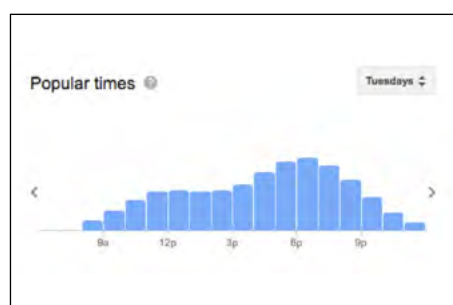
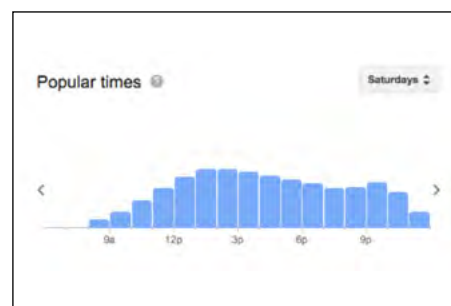
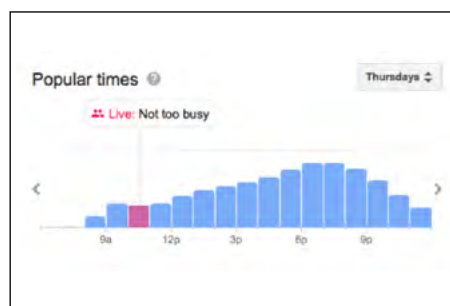
Implications for Retail Design and Development

- Population densities need to achieve threshold populations within 5 and 10 minute walking distances to support local serving neighbourhood retail.
- The design must be conducive to local shopping in terms of ease of shopping, convenience, as well as key principles of accessibility and visibility.
- Loading, receiving, and waste areas need to be located within the property based on balancing the nearby residential and retailer needs.

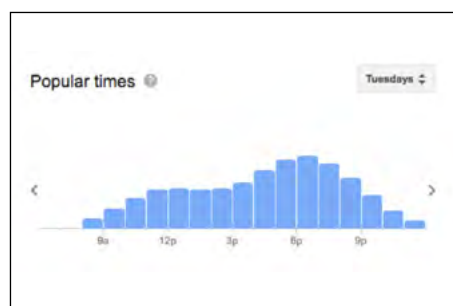
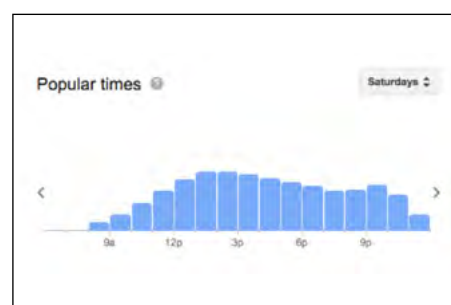
Examples: Convenience, Open All Hours And Walkable Density



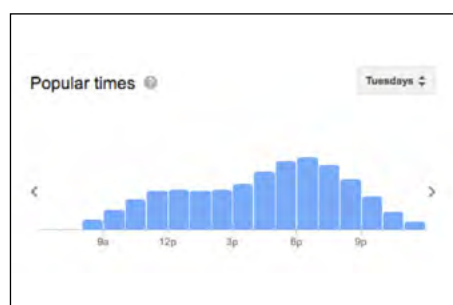
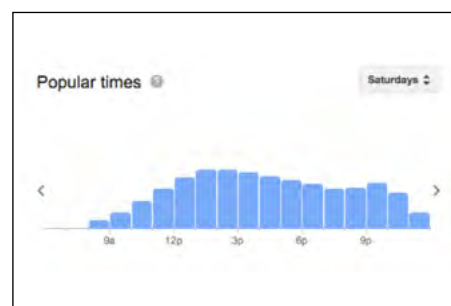
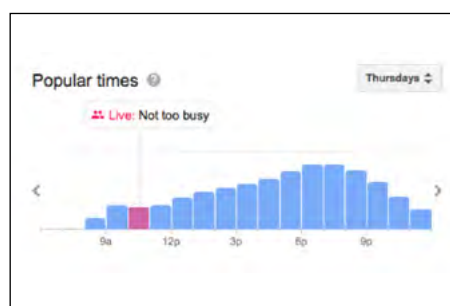
Shoppers Drug Mart, Carlaw/Queen



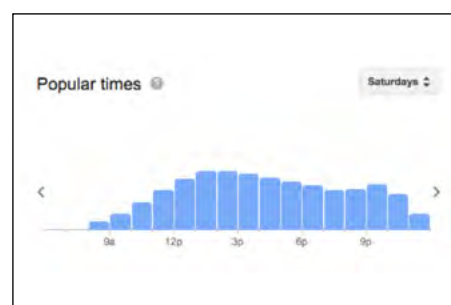
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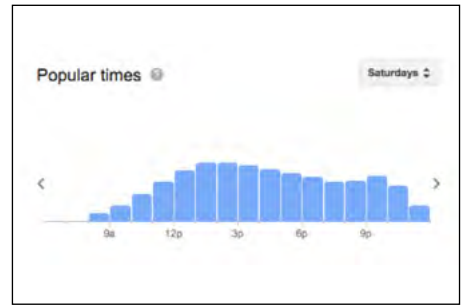
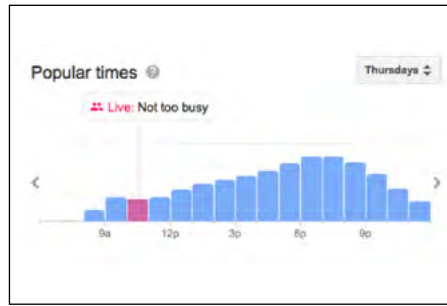
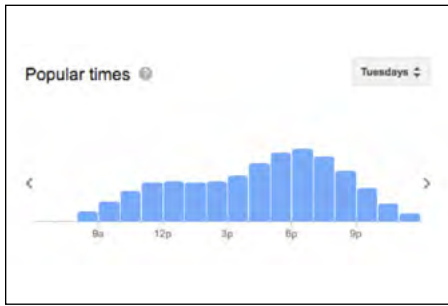


Rexall, Cliffside

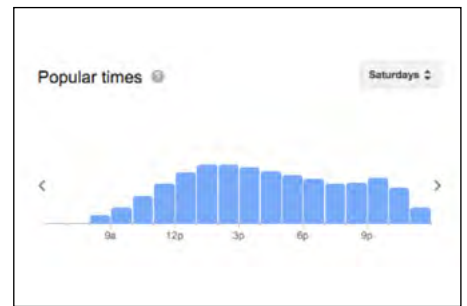
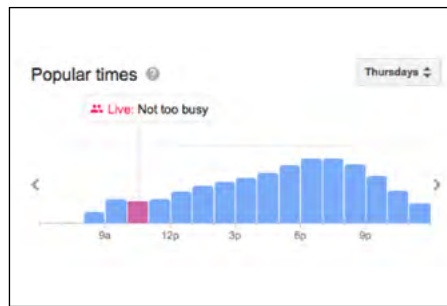
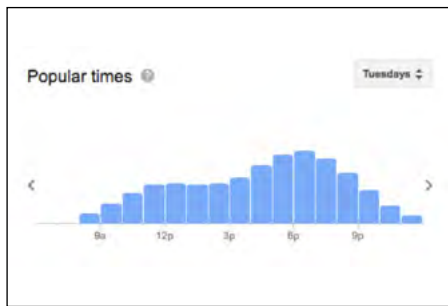


Loblaws, 3507 Yonge

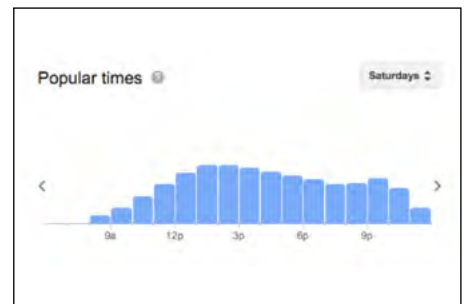
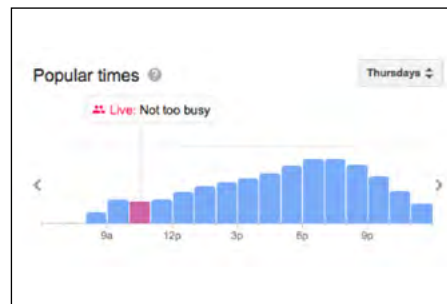
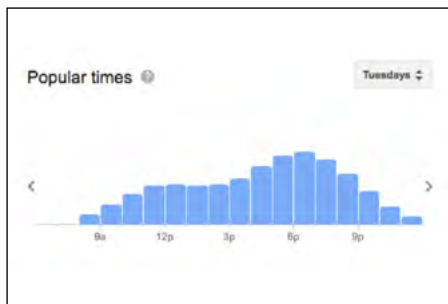




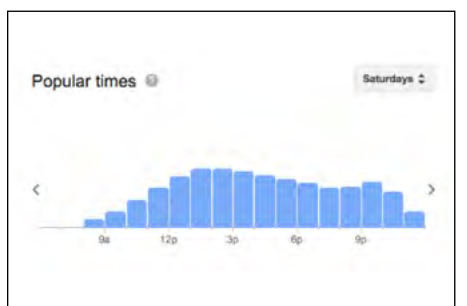
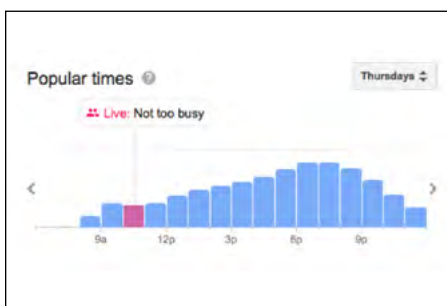
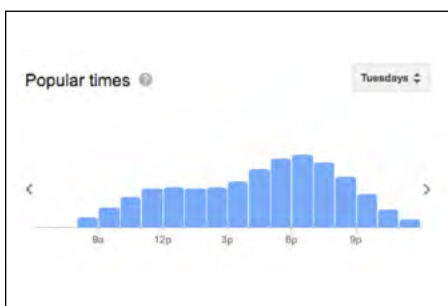
Sobey's, Fort York/Spadina



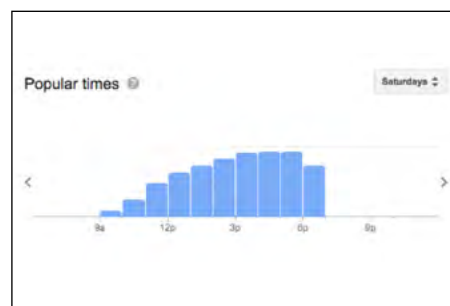
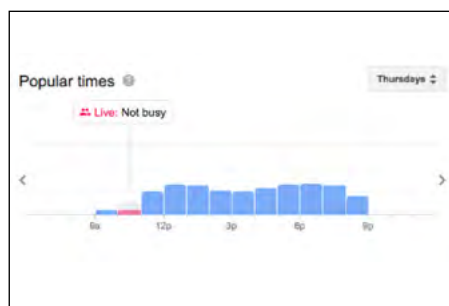
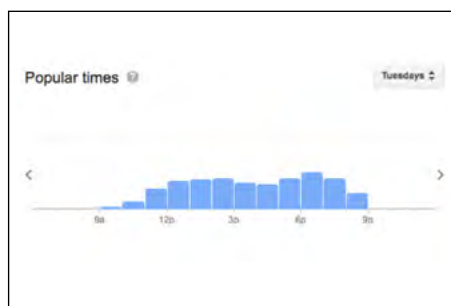
Farm Boy, Etobicoke, Hwy 427



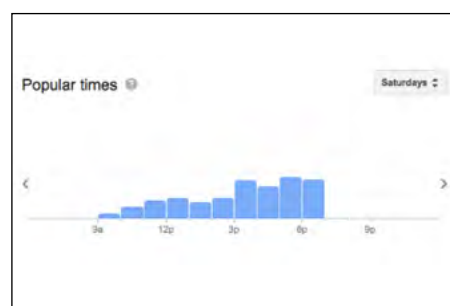
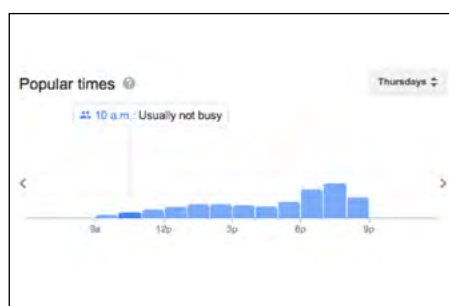
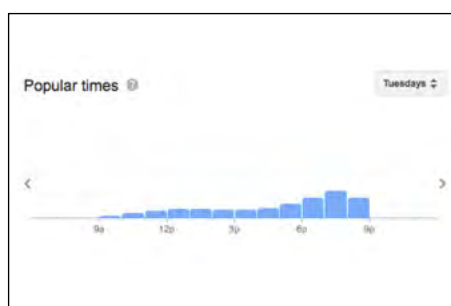
Longo's, Maple Leaf Square



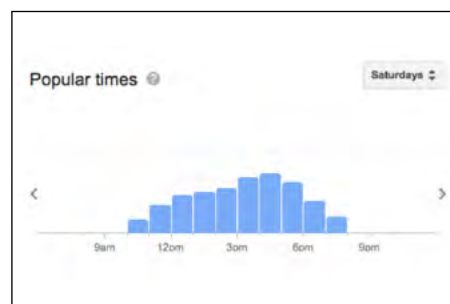
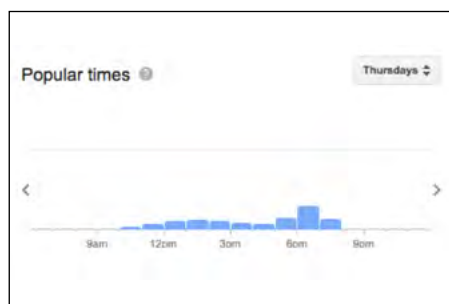
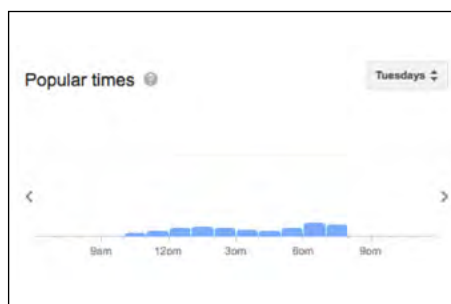
Metro, Cloverdale Mall



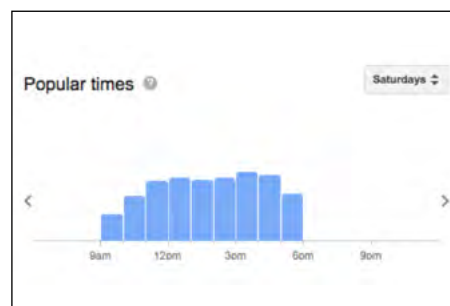
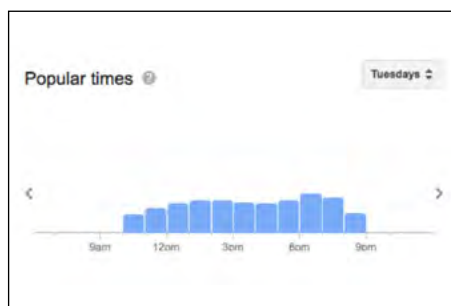
Adonis, Golden Mile



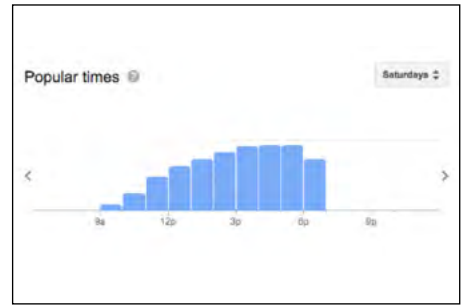
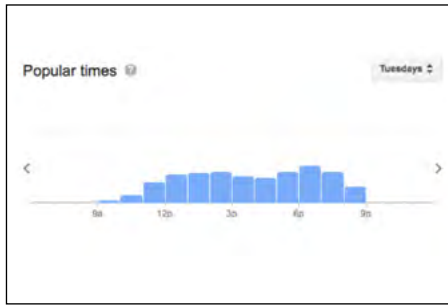
Metro, Finch/Warden



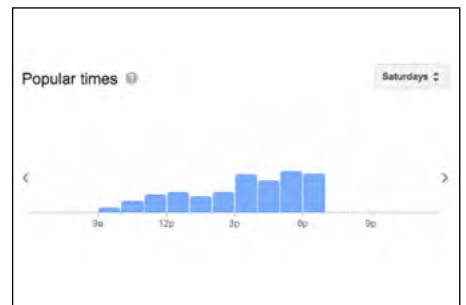
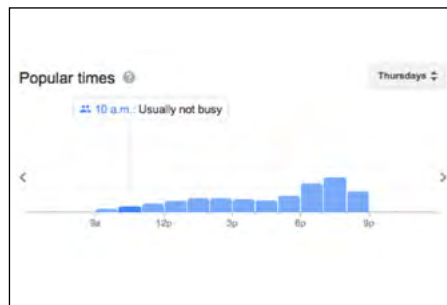
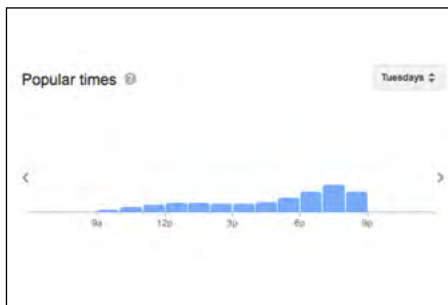
Loblaw's, Queen/Portland



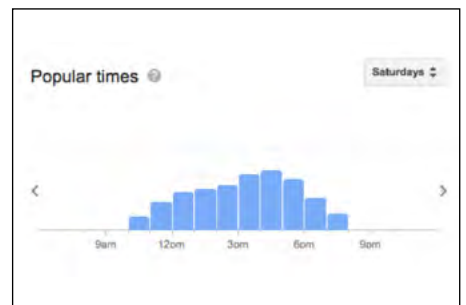
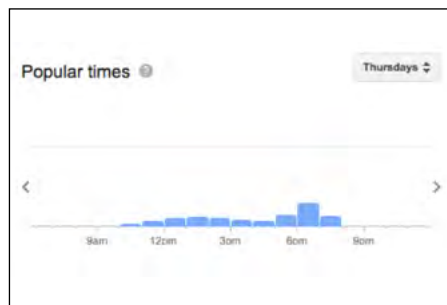
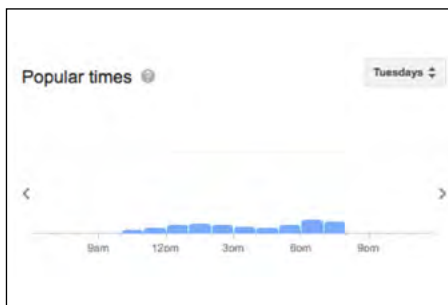
Boston Pizza, Eglinton Corners



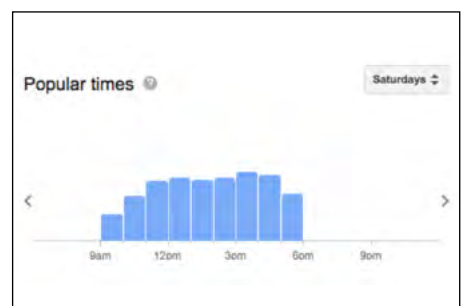
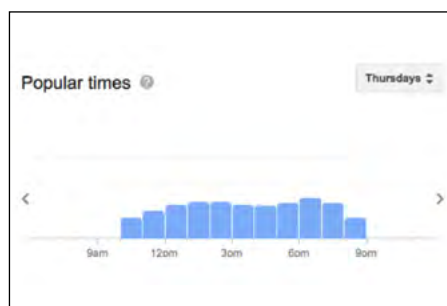
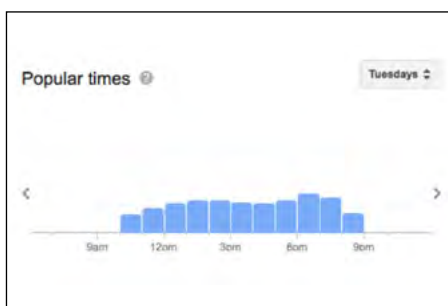
Winners, Victoria Park



Winners, Yonge Sheppard Centre



CB2, Queen St. W.



Costco, Queensway



Photo: Bird

Sustainability, Sharing and the Circular Economy

Trend Description: *Ownership meets Sustainability*

- On the opposite side of individualization sits the sharing economy.
- Millennials influenced the shift in shopping towards a sharing and re-using (circular) model of ownership and the trend continued with the Generation Z population.
- Less emphasis on new purchases but increased opportunities for bricks-and-mortar locations to facilitate the exchange of items as part of this new journey.
- Increased use of technology has advanced proliferation of sharing/re-use.
- Heightened importance placed on sustainability and associated retail store concepts.
- Reduced packaging and use of plastics, the increasing importance of recycling and waste management.

Why is it Relevant?

- Sharing economy is now embedded into much of our lives.
- Antique stores, vintage clothing shops, curated hipster flea markets, winter jackets made from recycled down duvet feathers, and even food are now part of the growing circular economy.
- Retail bricks-and mortar stores are now accepting used merchandise in exchange for new merchandise and need to be able to handle that flow of goods.
- The sharing economy has shown that retail has moved away from the purely transactional functionality and into the everyday living. It is no longer about “buy, use, dispose” or about acquiring things.
- Ownership of things is increasingly less important, and it is more about moments, life’s journey, and sharing.

Implications for Retail Design and Development

- A number of retail design and development elements from communal tables at restaurants, to renting clothing, tools, to home shares (Airbnb), and parking sharing (Honk Mobile) influences new purchase decisions as well as impacts where transactions are taking place.
- Retailers are increasingly marketing their ‘green’ initiatives, impacting their retail design and operations.
- People are looking for Instagrammable moments, and the retail design feeds into that imperative.
- Sustainability also extended beyond lifestyle preferences to real estate development (e.g. LEED standards, the efficiency of built form elements).



Photo: ATALIASPHOTOS

Appendix 4

CASE STUDIES

Summary Points

The underlying approach to the overall study was to understand how the design of the retail spaces in Toronto can contribute to the idea of successful retail. To achieve that end, the background research analyzed from a holistic lens the four main principles related to retail success with a specific focus on retail design elements. These four principles included (1) city building; (2) municipal economic development; (3) business functionality and profitability; and (4) adaptability.

The holistic lens is a very important component of the study as it allows our team to assess the interconnectedness of the retail design elements and move beyond a discussion of purely aesthetic type elements.

Retail is built upon primarily two key pillars – accessibility and visibility. The case studies illustrate the how retail design supports and feeds these pillars.

From a visibility perspective, it is within that 100 m and 25 m distance that the retail unit comes into focus. At that distance only certain elements of the building and design can be seen. The person on the street cannot see into the building or know where the entrances are exactly, but through the articulation of the building including the volumes and material distinction the person can be

assured that there is further retail ahead. The articulation of the retail units can be achieved through a number of ways including volumes and materials distinction as well as through colours, step backs, setbacks, canopies, height, retail scale, architectural detailings, patio spaces, among other ways. The person on the street at that distance can distinguish that the buildings ahead are retail oriented, set apart from the rest of the buildings, and are interesting enough to continue their journey forwards improving city building principles of increased walkability and business functionality of increased accessibility.

It is only when the person on the street is within 7 to 8 m of the retail unit that the storefront details and pedestrian perception comes into play in terms of increasing the accessibility features. At a visibility within this 7 m distance the person can understand the entrances, amount of contiguous retailing, the window transparency and glazing, corner treatments, patios and public realm usage, etc. The person can decide whether to enter the retailer space thereby increasing accessibility and potentially business profitability.

For example, at 109 Ossington, the choice to include recessed doors with windowed sides matches the city building principle of matching the character and context of the street but it also has a economic underpinning whereby it creates an optical illusion that the store widths are wider as the visitor perceived greater transparency and views into the retail unit.

The interplay of both visibility and accessibility is enhanced through signage that supports branding and identity elements of the building and retail space and lighting.

438 King St. W., Toronto

Retail building type: *Tower: Ground floor aligned, Corner*



Support Retail Business Functionality & Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Residential: Trade area within 400 m circle was 14,347 in 2018 and growing by 16% annually
- Employment: Trade area within 400 m circle was 38,472 daytime employees

Block

- Combination of local residents and commuter based traffic patterns - Busy from 2 pm to 10 pm but busiest 6 pm to 10 pm (27% of all ped. traffic)

Building

- Residential units above provide captive market for the retail units at grade

Meet Back of House Requirements

Building

- Easy to access laneway service area with semi-open air loading dock (not screened area)

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Combination of local residents and commuter based traffic patterns - Busy from 2 pm to 10 pm but busiest 6 pm to 10 pm (35% of all ped. traffic)

Building

- Spadina is 45 m wide and sidewalks are 6 m wide
- Design of the retail engages with the commuter flow of pedestrians and stands out form further away
- Grocery tenant feeds off of and supports pedestrian activity



Photo: ATALIASPHOTOS

Support Social Interaction



Building

- 2 retail tenants
- Over 80% of both Spadina and King St. W. have retail frontages
- Retail design allows for social interaction through wider sidewalks, patio space, high % of glazing/permeability into the grocery unit (though frosted)
- 85% of Spadina has glazing
- Ceiling heights are 4 m to 7 m at the corner
- 2 sides of the development are animated with retail

Enable A Diversity of Commercial Uses

Building

- Note that grocery store unit was to have smaller units along Spadina but the tenant locks 2 of the 3 doors on Spadina (patio enlivens the street where the locked doors deaden the street)

Enable A High Degree of Access and Connectivity

Building

- Retail maximizes corner location attributes

Support Public Safety

Block

- Block is busiest from 6 pm to 10 pm which can create a safer environment by having a retailer open later hours

Building

- Patio allows more eyes on the street

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Block

- Wider ROW on Spadina Ave.

Building

- Retailer at corner creates presence through: (1) double height corner of 7 m, (2) corner entrance, and (3) patio with approx. 6 m sidewalk of which over 2 m is patio
- At the corner, the residential step back from the retail on Spadina helps to articulate the retail space and makes it stand out

Have Regard for Character and Context of Area

Building

- The materials including the yellow brick is in keeping with local heritage building that Toronto is known for

Support Environmental Sustainability and Responsibility

Building

- Tier 1 TGS (Toronto Green Standard)

Support Local Economic Development and Job Growth

Support Local Job Growth

Building

- Longer hours of operation supports opportunities for full and part time employment for nearby residents

Encourage Local Residents and Employees to Shop Locally

Neighbourhood	Block	Building
<ul style="list-style-type: none"> Residential: Trade area within 400 m circle was 14,347 in 2018 and growing by 16% annually Employment: Trade area within 400 m circle was 38,472 daytime employees 	<ul style="list-style-type: none"> Block attracts 67% of visitor traffic from an average distance of 3.5 km (relatively tight area) 	<ul style="list-style-type: none"> Retail design needed to take advantage of the high density target markets – local growing residents who shop more during the evening and Downtown office worker commuters who pass by the building

Support the Prosperity and Growth of Local Independent Businesses

Block	Building
<ul style="list-style-type: none"> Net retail rental rates increased from \$46 to \$57/s.f., from 2015 to 2018, yet independent retailer remained in place allowing for increased sales in relation to increased rents 	<ul style="list-style-type: none"> 2 Tenants – grocery and bank. Grocery tenant has remained as an independent retailer throughout the tenure Grocery is paying \$60/s.f. and is very productive despite internal layout issues and too small a space for the requirements of the neighbourhood

Design Adaptable Communities and Structures

Enable a Diversity of Commercial Uses

Building
<ul style="list-style-type: none"> Two retailers located on site: one independent and one chain

Accommodate Future Intensification

Building
<ul style="list-style-type: none"> No turnover in tenants since opening

Additional Issues:

- At present the retail space is too small for the current grocery operations. It would have been better as an 800 to 1000 m² space.
- The grocery store expanded into the adjacent retail units on Spadina. This resulted in uneven floors and the need to use internal ramps throughout the interior of the store. This issue of the placement of the ground floor slab on a sloping street is an issue to be addressed.
- The frosted glass frontage is not ideal for permeability.
- Windows along the street would have been better if they opened to the patio space.

109 Ossington Ave., Toronto

Retail building type: *Mid-rise; Ground floor aligned; Mid-block*



Photo: ATALIASPHOTOS

Business Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Residential: Trade area within 400 m circle was 5,032 in 2018 and growing by 2.2% annually

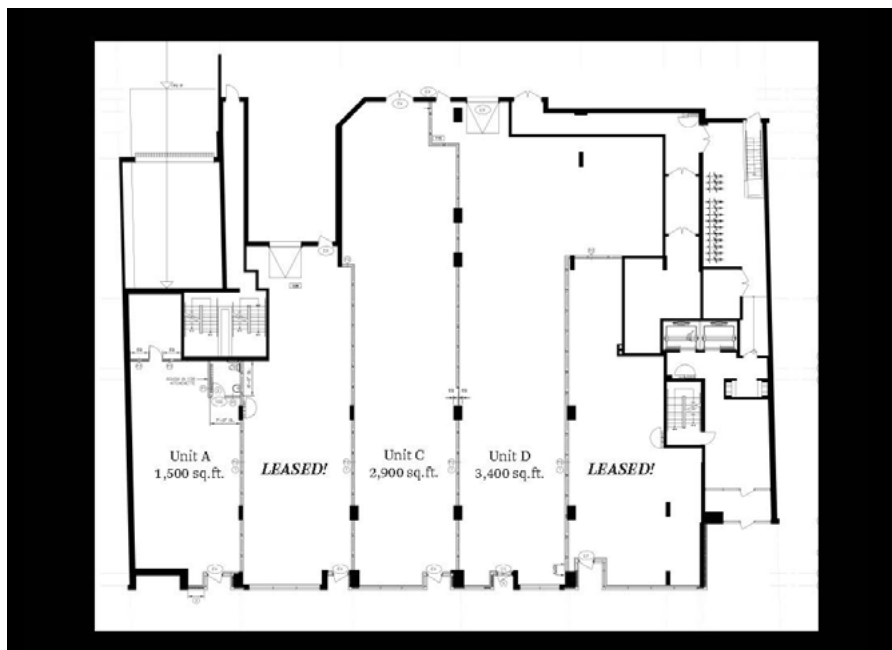
Block

- Combination local residents and commuter based traffic patterns - Busy from 2 pm to 10 pm but busiest 6 pm to 10 pm (27% of all ped. traffic)

Building

- Adds residential market above the retail to support demand for local goods and services and increase the threshold level to support local retail

Meet Functional Requirements of Tenants



Building

- The residential entrance was located completely to one side of the building so the elevator would not interfere with the depth of the retail units. The retail units have access to the back loading area directly
- Though no parking was required, the site has 4 surface and 6 underground retail parking spaces

Meet Retailer Back of House Requirements

Building

- Widened alley way access to allow for semi open loading, with no screening. Retail parking can be used by tenants as well as for quick loading purposes

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Development increased pedestrian oriented retail on the east side of Ossington encouraging an active double loaded retail environment and increased critical mass of retail
- Busy from 2 pm to 10 pm but extremely busy 6 pm to 10 pm (35% of all pedestrian traffic)

Building

- Ossington frontage is 19 m long and sidewalk width is 5 m
- Grocery tenant and cafes feed off of the local neighbourhood walking population

Support Social Interaction



Building

- 1 m setback from property line creates wider sidewalks and allow for some merchandise display outside including added outdoor benches at the café space (but setback is not sufficient for a full patio)
- Curb to building face width is 5 m
- 85% of Ossington facade is glazing
- Ceiling heights are 4.5 m
- Only the primary facade is animated with retail as it is an infill project

Enable A Diversity of Commercial Uses

Building

- 5 retail units
- 1,072 m² retail
- Smaller units to match the retail context of this specific district. Limits were set on retail size (majority under 220 m² and 1 unit greater than 550 m²) – all units are under 300 m²

Enable A High Degree of Access and Connectivity

Building

- 5 entrances with an entrance approximately every 9 m
- The doors are recessed to match the area but also create an optical illusion that makes the storefront appear wider and more inviting

Support Public Safety

Building

- Increased eyes on the street especially during the active evening period

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Upper level residential step back to allow for greater retail articulation and mitigate pedestrian height perception
- Building materials, doors and window placement and treatment fit the context

Have Regard for Character and Context of Area

Building

- Small scale retail, multiple entrances and materials match the context along Ossington

Support Environmental Sustainability and Responsibility

Building

- Tier 1 TGS (Toronto Green Standard)

Municipal Economic Development

Support Local Job Growth

Building

- Increased retail employment opportunities within the area for local residents

Encourage Local Residents and Employees to Shop Locally

Neighbourhood

- Residential: Trade area within 400 m circle was 5,032 in 2018 and growing by 2.2% annually

Block

- Block attracts 67% of visitor traffic from an average distance of 2.7 km (relatively tight area)

Building

- First, the retail design needed to take advantage of the shift to local retail demand as the 400 m trade area population approaches the threshold of 7,000 residents but secondarily, the retail design had to cater to the regional shopping visitors
- Encourage neighbourhood life with appropriately sized retail units
- Respects the retail character

Support the Prosperity and Growth of Local Independent Businesses

Block

- Net retail rental rates increased from \$42 to \$57/s.f. from 2015 to 2018, yet independent retailers along Ossington have primarily remained in place allowing for increased sales in relation to increased rents

Building

- All units are small independent businesses

Design Adaptable Communities and Structures

Enable a Diversity of Commercial Uses

Building

- Diverse tenant mix including food store, restaurant, café, apparel, and eyewear technology store

Accomodate Future Intenstification

Building

- All units are of varying sizes but the units are designed with narrow frontages and deeper lengths to accommodate a wider variety of potential business uses (average: 9 m wide x 25 m deep)

Yonge and Sheppard, 4841 Yonge St., Toronto

Retail building type: *Tower: Ground floor aligned; Entire block; Large retail structure*



Support Retail Business Functionality & Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Residential: Trade area within 400 m circle was 15,131 in 2018 and growing by 6.0% annually
- Employment: Trade area within 400 m circle was 14,760 daytime employees but site is a major hub for local employees to transfer through

Block

- Pedestrian traffic is evenly spread throughout the day from 10 am to 10 pm (even a high morning traffic pattern comparatively) – 23% 10 am to 2 pm; 26% from 2 pm to 6 pm; and 24% from 6 pm to 10 pm

Promote Energy Efficiency

Building

- Upgrades to MEP systems help to reduce utility costs for the retail tenants

Meet Retailer Back of House Requirements

Building

- Loading area was redeveloped to allow for complete interior movement within the building and the 10 bays

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Pedestrian traffic is evenly spread throughout the day from 10 am to 10 pm (even a high morning traffic pattern comparatively) – 23% 10 am to 2 pm; 26% from 2 pm to 6 pm; and 24% from 6 pm to 10 pm

Building

- Yonge is 40 to 45 m wide and sidewalks vary from 8 to 10 m
- The design needed to accommodate high pedestrian traffic throughout the day and evening – including lighting and accessibility
- Redeveloped block includes widening sidewalks, removing the “moats” that separate the retail from the pedestrian traffic, and bringing the retail units closer to the street and surrounding the stairs/change in elevation issues
- Inside the aisles were widened and increased natural light was incorporated into the design

Support Social Interaction



Building

- There are 8 small retail units along Yonge St. and two major entrances to the interior retail area
- Added more retail to support local neighbourhood including grocery and gym as well as interior seating and food court, more interior areas for socialization
- 90% of Yonge St. side is glazing
- Ceiling heights are 5 m
- There are 2 sides that are animated with retail

Enable A Diversity of Commercial Uses

Building

- Over 80 retail units and over 21,142 m² retail
- 83% of retail units are under 400 m²

Enable A High Degree of Access and Connectivity

Building

- Entrances along Yonge St. on average are 6 m apart
- Improved connections to TTC

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Design allows for the sense of double heights at key locations through light displays

Have Regard for Character and Context of Area

Neighbourhood

Block

- This part of Yonge St. is developing into a major pedestrian corridor throughout the entire day and not just related to commuter activity

Building

- Design matches the character of a large major node – transit, residential, daytime employment, entertainment that supports more flagship type retail design

Support Local Economic Development and Job Growth

Support Local Job Growth

Building

- Better designed retail is an amenity for office workers and can aid in the recruitment of tenants for the upper level office tower

Encourage Local Residents and Employees to Shop Locally

Neighbourhood

Block

- Residential: Trade area within 400 m circle was 15,131 in 2018 and growing by 6.0% annually.
- Employment: Trade area within 400 m circle was 14,760 daytime employees but site is a major hub for local employees to transfer through

- Block attracts 67% of visitor traffic from an average distance of 4.0 km reflecting the regional draw that the office market serves

Building

- Development includes residential towers
- Through changes to the street level retail experience and the interior retail layout, the overall retail design created a true 18 hr/7 day/week retail environment that capitalizes on the shift to local retail demand due to 15,000 residents nearby as well as office workers and commuters

Support the Prosperity and Growth of Local Independent Businesses

Neighbourhood

Block

- Net retail rental rates increased from \$26 to \$32/s.f. from 2015 to 2018
- Lease rates are in the range of \$23 to \$40/s.f.

Design Adaptable Communities and Structures

Enable a Diversity of Commercial Uses

Building

- Range of tenants from food court, anchor eating establishments, grocery, recreation, services, and support services

Accommodate Future Intensification

Building

- Removes the cinema which was no longer in demand and replaced it with larger format retail uses on third and fourth levels



Photo: ATALIASPHOTOS

Additional Issues:

- There was to be an upper level balcony at the southern corner but the wind studies found issues.

QRC 134 Peter St., Toronto

Retail building type: *Tower (office); Corner; Heritage*



Photo: ATALIASPHOTOS

Support Retail Business Functionality & Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Residential: Trade area within 400 m circle was 11,879 in 2018 and growing by 13.7% annually
- Employment: Trade area within 400 m circle was 24,979 daytime employees
- Major intersection for Entertainment District

Block

- Equally busy from 2 pm to 10 pm; 26% from 2 pm to 6 pm and 26% from 6 pm to 10 pm based on a combination of local residents, daytime workers, and night time entertainment seekers

Building

- The retail design needed to work within the heritage structure and create an appealing eating establishment that would have broad appeal from local residents to office workers, to entertainment visitors in an interactive manner

Meet Retailer Back of House Requirements

Building

- Loading dock is located on both alleys and are open with no screening
- There are issues with moving waste and food across the lobby area that could not be solved with the design

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Equally busy from 2 pm to 10 pm; 26% from 2 pm to 6 pm and 26% from 6 pm to 10 pm based on a combination of local residents, daytime workers, and night time entertainment seekers

Building

- John St. is 18 m wide and the sidewalk is 3.5 m wide at the retail portion (due to the heritage building) the rest of the building is set back further allowing for wider sidewalks
- In the Entertainment District, west of the Financial District, there is an increasing importance of the ladder streets such as Duncan St., John St., and Peter St. to fill in with retail and social gathering places as natural breaking points along the commute home for many local residents/ office workers

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- The heritage building creates the office lobby height and open structure that allows natural light into the interior public space

Support Social Interaction



Building

- Relatively narrow sidewalks along Peter St. and Richmond St. W. (approx. 3 m) due to the location of the heritage building
- However, the addition was set back from street and social gathering places were included inside the building
- There is no restaurant back of house – all the food prep takes place in the open and much of it occurs on the Peter St. side creating increased street interest
- John St. side accounts for 85% glazing
- Ceiling heights are 5 m
- There are 2 sides that are animated with retail

Have Regard for Character and Context of Area

Building

- Heritage facades are retained and integrated into new development and retail
- Signage does not overpower the heritage structure

Support Local Economic Development and Job Growth

Support Local Job Growth

Building

- Design allows for amenities and social gathering spaces for employees within the building that can help in attracting employers to locate in the office tower

Encourage Local Residents and Employees to Shop Locally

Neighbourhood	Block	Building
<ul style="list-style-type: none"> Residential: Trade area within 400 m circle was 11,879 in 2018 and growing by 13.7% annually Employment: Trade area within 400 m circle was 24,979 daytime employees Major intersection for Entertainment District 	<ul style="list-style-type: none"> Block attracts 67% of visitor traffic from an average distance of 3.3 km reflecting the combined appeal of local residents and regional draw that the office market and entertainment market serves 	<ul style="list-style-type: none"> Rather than attempt to break up the heritage façade along Peter St., the design allowed for one larger retail unit/venue on Peter St. that works well for night time visitors as well as daytime office workers and local resident brunch customers

Support the Prosperity and Growth of Local Independent Businesses

Block
<ul style="list-style-type: none"> Net retail rental rates increased from \$36 to \$52/s.f. from 2015 to 2018 and rent at Ricardo's is set at \$60/s.f.

Support Tourism & Efforts to Attract Customers from Outside the Local Area

Neighbourhood	Building
<ul style="list-style-type: none"> Part of the Entertainment District – design needed to complement the area 	<ul style="list-style-type: none"> Large destination type restaurant with interactive food prep display Unique lighting display on the outside that adds to the entertainment aspects of the street and night life

Design Adaptable Communities and Structures

Accommodate Future Intensification

Building
<ul style="list-style-type: none"> Was able to repurpose existing façade and building structure without demolition

Additional Issues:

- The 8000 s.f. restaurant was very difficult to lease. Hard to find that size of retailer.
- There was to be a restaurant on the upper level of the heritage building but an office tenant wanted it instead.
- The interior space with ample light has become a de facto public gathering space. It can be rented out for events.

The Rise, Cambie St., Vancouver

Retail building type: *Mid-Rise, Ground floor aligned; Entire block, Large retail structure*



Photo: Urban Land Institute

Support Retail Business Functionality & Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Residential: Trade area within 400 m circle was 4,111 in 2018 and growing by 3.4% annually.
- Employment: Trade area within 400 m circle was 9,696 daytime employees
- Retail is dependent on parking and visitors coming from further away

Block

- Busy throughout the day from 10 am to 10 pm but busiest from 2 pm to 6 pm during evening commute (35%)

Building

- Note that some retail units on the side streets are vacant due potentially to lack of visibility and lack of double loaded retail (adjacent retail uses from street level)

Meet Retailer Back of House Requirements

Building

- Minimize the impact of MEP by internalizing it
- 1 acre in size internal truck movement area with access to 4 freight elevators

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Cambie is 40 m wide and the sidewalk is 10 m wide
- Busy throughout the day from 10 am to 10 pm but busiest from 2 pm to 6 pm during evening commute (35%)

Building

- Wider sidewalks with stepped patios and separate unit entrances to account for grade changes

Support Social Interaction

Building

- Each retail unit on Cambie St. includes a patio space or outdoor merchandising space
- Cambie side is 90% glazing
- Ceiling heights are 4 m to 9 m (at the grocery store)
- 3 sides of the building are animated with retail



Photo: Urban Land Institute

Enable A Diversity of Commercial Uses

Building

- 21,550 m² of retail
- 18 units and 15 (83%) are under 400 m²
- 3 large format stores
- City req. developer to wrap building skin with small retail units

Enable A High Degree of Access and Connectivity

Building

- Retail on 3 sides
- Cambie: 8 entrances, 100% retail streetfront coverage, 8 entrances with average entrance every 10 m
- Note: retail on all three sides has not been entirely successful – primarily successful on Cambie and part of 8th Ave. due to better visibility

Support Public Safety

Building

- Very active streetfront with eyes on the street

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- City req. developer to maintain view corridor and 7.5 m setbacks
- 3 major public spaces at each major corner as well as a rooftop garden
- Materials chosen were to support high quality retail design within “Vancouverism” accepted style standards

Have Regard for Character and Context of Area

Building

- City required residential uses and for the articulation of retail spaces that is distinct from the residential / other uses
- City required the larger retail units to be wrapped in a skin of small retail units
- City required developer to maintain view corridor which allowed for increased outdoor merchandising and patio space

Support Environmental Sustainability and Responsibility

Building

- City required reductions in energy use, greenhouse gas emissions, water usage, irrigation, stormwater, green roof

Support Local Economic Development and Job Growth

Encourage Local Residents and Employees to Shop Locally

Neighbourhood

- Residential: Trade area within 400 m circle was 4,111 in 2018 and growing by 3.4% annually.
- Employment: Trade area within 400 m circle was 9,696 daytime employees
- Retail is dependent on parking and visitors coming from further away

Block

- Average distance travelled of visitors is 1.8 km resulting in a tighter trade area primarily serving the local residents but there is also significant regional visitation for the larger format stores

Building

- Retail design includes both small scale local neighbourhood retail needs combined with regional visitation for the larger format stores

Support the Prosperity and Growth of Local Independent

Block

- Net retail rental rates increased from \$31 to \$40/s.f. from 2015 to 2018

Building

- Net rents are \$31 to \$38/s.f. and up to \$95/s.f. for units under 100 m²
- This relates to relatively high sales productivity for the smaller retailers on Cambie St.

Design Adaptable Communities and Structures

Accommodate Future Intensification

Building

- Large units can be converted to smaller units, roof garden can be glazed to allow daylight into smaller units on 3rd floor, window glazing can be switched from opaque to clear

Additional Issues:

- The retail units on the side streets are often vacant and not leasable.
- Cambie Street and portions of 8th Ave near Cambie work very well.

Suter Brook, Port Moody

Retail building type: *Low to mid rise including horizontal mixed use; Entire block; Corner*



Photo: Suter Brook

Support Retail Business Functionality & Profitability

Provide Sufficient Market and Strong Retail Visibility

Neighbourhood

- Two master planned communities will have approximately 7,000 residents upon completion

Provide Sufficient Market and Strong Retail Visibility

Building

- Most retail units are narrow and deep with direct access to back loading area
- Grocery store is wrapped in retail skin

Meet Retailer Back of House Requirements

Building

- Loading is off of the main arterial road in both a semi-open loading dock and open area for small trucks
- Area is screened with fencing and plantings
- There are limited number of street front loading zones

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Street is 22 m wide and sidewalks are 4 m wide
- Two master planned communities are encouraging linkages and pedestrian flow between them through high quality corner design at the arterial road
- Master planned community is focused internally on new private roads
- Busy from 10 am to 6 pm but particularly 2 pm to 6 pm (30% of all pedestrian traffic)

Building

- Suburban nature of the local population support stay at home parents and commuting traffic patterns

Support Social Interaction

Block

- Create a pedestrian only public gathering square on the north side of the block including seating

Building

- City encouraged outdoor merchandising, seating, and retailer streetscaping
- Developer agreed to build a public square at the north end of the development that increases the sense of belonging and community when properly animated
- Street is 95% glazing
- Ceiling heights are 5 to 6 m
- One side of the building is animated with retail

Enable A Diversity of Commercial Uses

Building

- 5 Retail units of varying sizes
- Site is mixed use horizontal with lower density uses above the larger grocery unit allowing for smaller columns and increased interior sight lines

Enable A High Degree of Access and Connectivity

Building

- Ground level access
- Movator and elevator connect to underground parking
- Parking is located under all buildings in a common area under private road network
- Complaint by visitors is that vehicular access to public parking is in another block and some retail units are located on the plaza with no direct vehicular access



Photo: Omni Group Corp.

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Used a variety of building materials, and articulation to break up the massing including second level step backs
- Used high quality brick, concrete, glass, and pavers to avoid cookie cutter look and feel
- Included parapets, cornices and open canopies

Have Regard for Character and Context of Area

Building

- City required design of all buildings as per detailed design guidelines for this area

Support Environmental Sustainability and Responsibility

Building

- LEED Gold

Support Local Economic Development and Job Growth

Encourage Local Residents and Employees to Shop Locally

Neighbourhood	Block	Building
<ul style="list-style-type: none"> • The businesses need to draw from other neighbourhoods to be successful until full build out of the residential and office community 	<ul style="list-style-type: none"> • Block attracts 67% of visitors from 3.5 km resulting in a broader trade area 	<ul style="list-style-type: none"> • Diversity of retail units to support local neighbourhood shopping needs

Support the Prosperity and Growth of Local Independent Businesses

Building

- Net retail rental rates have remained constant at \$35/s.f. from 2015 to 2018
- Net rents are \$35/s.f.

Additional Issues:

- The height of the Starbucks is higher than it should be. It is a bit excessive and can see that some of the space is painted black.
- Note that residents have complained about the semi-open loading area including noise (however it is noted that some noise is inevitable)

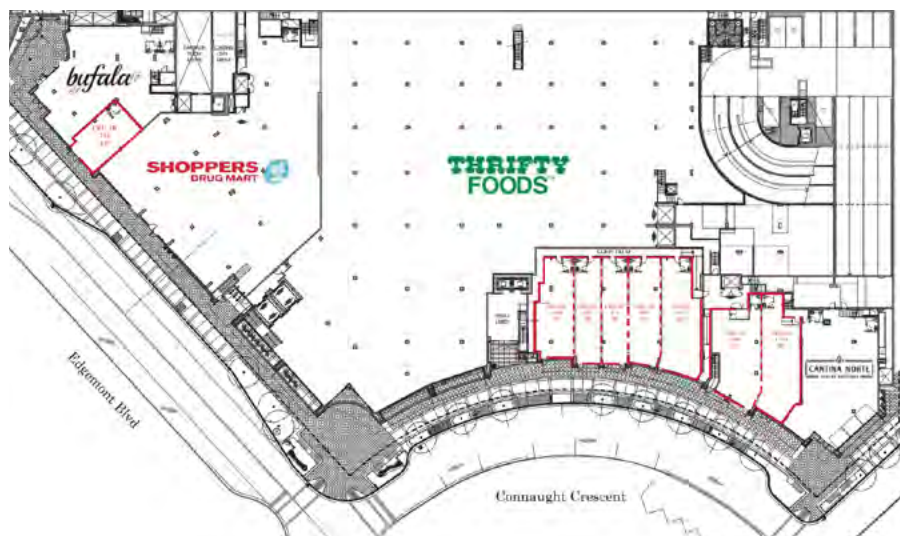
Connaught, North Vancouver

Retail building type: *Ground floor aligned use*



Support Retail Business Functionality & Profitability

Meet Functional Requirements of Tenants



Building

- Smaller personal services and retail units within the development are narrow and deep (average 6 m wide x 15 m deep)
- Whereas the corner eating establishment units are more square in size with wider street frontages which helps to animate the streets

Meet Retailer Back of House Requirements

Building

- Two loading area with a total of 6 bays are included, both include fencing and plantings but trucks must back into the bays

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Sidewalks are 4 m
- Busy during the day from 10 am to 6 pm
- Busiest 10 am to 2 pm (32%)

Building

- Local residents are the primary target market for the retail and the retail design addresses the local market

Support Social Interaction

Building

- Three public plazas located at each major corner are planned – at each restaurant location and the grocery store location
- City established the maximum 60 outdoor seats for eating and 24 outdoor seats for grocery store

Enable A Diversity of Commercial Units

Building

- 5,500 m² retail
- 11 retail units; 8 (73%) are under 400 m²
- Large retail unit (grocery) is wrapped in skin of retail
- Personal service and retail units are narrow and deep and eating establishment units are equal sided

Enable A High Degree of Access and Connectivity

Building

- Along Connaught: 95% retail street front
- 9 entrances with average entrance every 8 m
- Along Edgemont: 100% retail street front and 4 entrances with average entrance every 25 m
- Access from movators and elevators in the underground parking is provided

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Rezoned but in compliance with Centre Plan and Design Guidelines
- Req. development permit for form and character of commercial area and mixed use building
- Columns and pilasters create a good design and connection to the overall project, yet the retail design is clearly separated from the residential use above

Have Regard for Character and Context of Area

Building

- City required development to maintain mountain views, max sunlight exposure, use Silva cells for trees and manage stormwater

Support Environmental Sustainability and Responsibility

Building

- Development had to address energy/ water conservation and greenhouse gas emission reductions

Support Local Economic Development and Job Growth

Encourage Local Residents and Employees to Shop Locally

Neighbourhood

- The development addresses the fact that this older established community was losing population and it lacked critical mass of residential
- In 2018 there were 577 residents within 400 m and that had been declining

Block

- The new development would accommodate 165 new residents

Building

- The development maintained the grocery store in the neighbourhood complemented by a mixture of local goods and services including pharmacy, cafes, and small restaurants

Support the Prosperity and Growth of Local Independent Businesses

Block

- Net retail rental rates increased from \$25 to \$47/s.f. from 2015 to 2018, which supports both independent and national retailers in the area

Building

- Net rents are \$45/s.f. which accounts for a good return for a retailer

Additional Issues:

- Appears as though there is no refrigerated garbage room. It would have been better for the landlord to provide this amenity for the grocery and restaurants so that they don't have to allocate that space within their own retail units.

Pearl District, Portland

Retail building type: *Tower; Ground floor aligned; Corner; Entire block*



Support Retail Business Functionality & Profitability

Meet Retailer Back of House Requirements

Building

- Loading is located on main street

Support the Achievement of Complete Communities and City Building Objectives

Encourage Local Residents and Employees to Shop Locally

Block

- Street is 18 m wide and sidewalk is 3.2 m wide
- Most blocks in Downtown and Pearl District are short – 60 m x 60 m

Support Social Interaction

Building

- Retail uses allowed to spill out to the sidewalk including patio seating, bike rentals which enhances the streetscape quality and animation
- Retail street side is 65% glazing
- Ceiling heights vary from 4 m to 7 m (at the corner)
- 2 sides of the building are animated with retail

Enable A Diversity of Commercial Uses

Building

- 4 units along NW Marshall St.

Enable A High Degree of Access and Connectivity

Building

- NW Marshall St: 75% retail street front
- 4 entrances with an entrance on average 15 m

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Corner retail unit is double height to create draw and emphasis on window size (at the corner)
- Articulation of retail from the residential is clearly delineated with canopies at different heights which also enhances the corner expression

Have Regard for Character and Context of Area

Building

- Similar in style and design to Portland and Pear District area developments

Support Local Economic Development and Job Growth

Encourage Local Residents and Employees to Shop Locally

Building

- Allow for uses that local residents would want and complements nearby grocery store

Mandarin Gallery, Singapore

Retail building type: *Tower: Ground floor aligned; Corner; Large retail structure*



Support Retail Business Functionality & Profitability

Meet Functional Requirements of Tenants

Building

- The large columns are placed outside of the building in the ample sidewalk space as a transfer type structure so the internal columns do not have to be so wide and creates a better shopping experience with better interior sight lines and allowing storefront design to be articulated with fewer constraints

Meet Retailer Back of House Requirements

Building

- Loading is located on side alley in coordination with adjacent hotel

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Street is 55 m wide

Building

- Wide sidewalks approximately 14 m but pedestrians are pushed towards retail units either by large planting areas or by kiosks at the curb edge

Support Social Interaction

Building

- Retail street side is 80% glazing
- Ceiling heights vary from 5 m to 9 m
- 2 sides of the building are animated with retail

Enable A High Degree of Access and Connectivity

Building

- Orchard Rd: 95% to 100% of street frontage is retail
- 11 entrances with average entrance every 14 m which is proportionate to the mass of the building

Encourage High Quality Design to Support Attractive, Durable and Adaptable

Building

- Articulation of building edge creates active retail separation
- Ground floor expression is high but works at both a pedestrian scale as well as at a longer range visibility

Have Regard for Character and Context of Area

Building

- Fits in well with Orchard Rd and Singapore look and feel
- High gloss appeal to the retail frontages

Design Adaptable Communities and Structures

Accommodate Future Intensification

Building

- Retail units are narrow and deep which suits high fashion apparel and retail merchandise

Additional Issues:

- The outdoor signage may be too expensive for the retailer. In some cases; the landlord pays for the outdoor signage.

Mood, Stockholm

Retail building type: *Tower; Ground floor aligned; Corner; Entire block*



Photo: Mood

Support the Achievement of Complete Communities and City Building Objectives

Support Walkability

Block

- Retail street is 20 m wide and sidewalks are 4.5 m wide

Building

- Building has active retail frontages on three sides

Support Social Interaction

Block

- Retail street is 20 m wide and sidewalks are 4.5 m wide

Building

- Exterior and interior patios for people gathering and social interactions
- Retail street is 90% glazing
- Ceiling heights vary from 4 m to 9 m (at the corner)
- 3 sides of the building are animated with retail

Enable A Diversity of Commercial Uses

Building

- Over 10,000 m² of retail including retail, eating establishments, grocery, apparel, home furnishings, and concept stores

Enable A High Degree of Access and Connectivity

Building

- Along Norrlandsgatan: 4 retail units
- 85% retail frontage
- 4 retail entrances with average entrance every 15 m

Encourage High Quality Design to Support Attractive, Durable and Adaptable Placemaking

Building

- Corner units are well articulated and separated from upper levels
- Patio space is carved out of corner entrance with interesting overhead lighting system that takes advantage of Stockholm's long summer days and short winter nights

Have Regard for Character and Context of Area

Building

- Connects across two city blocks and adjusts for grade changes
- Rooftop patios create gathering places

Support Local Economic Development and Job Growth

Encourage Local Residents and Employees to Shop Locally

Neighbourhood

- Over 9,300 residents in the district as well as local daytime employees

Block

- Provides a connection between the high end luxury retail to the east and the mix of traditional mass merchandising and tourist retail to the west

Building

- Active social spaces for residents to linger both outside and inside

Enable A High Degree of Access and Connectivity

Building

- Along Norrlandsgatan: 4 retail units
- 85% retail frontage
- 4 retail entrances with average entrance every 15 m

Support the Prosperity and Growth of Local Independent Businesses

Building

- Mix of national/international brands and local independents
- Chains tend to locate on the outside

Support Tourism & Efforts to Attract Customers from Outside the Local Area

Neighbourhood

- Situated in a tourism area of the City

Sources

Rents: Retail rents are based on CoStar data. Trends are based on 2015 to 2018 changes. Current retail rents are based on data from December 2018.

Pedestrian Activity: Pedestrian activity is based on cell phone data from a sample of people located in the block of the development. It is based on one year's worth of data from Uber Media from December 2017 to November 2018. Visitors to the area had to have been in the block for a minimum of 10 minutes (so it excludes vehicular traffic and pass by traffic). Each visit is given a date and time stamp and a unique identifier registered to their postal code. Holidays and very frequent visitors were eliminated from the data. Average distance is based on the 67% closest visitors to the development block.

Demographic Data: Based on 2016 Census and Environics estimates and projections for 2018.

Lengths: based on known data from the development if available. Otherwise based on Google Earth estimates. Percentages are rounded to the nearest 5%.

Edgemount Connaught Application Jun 23 2015 District of North Vancouver

Connaught Edgemount Layout and Leasing Brochure

ULI Case Study – The Rise, Vancouver

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Development Permit Area Guidelines, DP Area #3, Suter Brook Site, Port Moody

Newport Village leasing – Colliers