

DOWNTOWN



Investment & Advocacy For Your Success

2010



Downtown Yonge Business Improvement Area
Toronto's premier *shopping, business* and *entertainment destination*.



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Message from Chair & Executive Director

The Board and management team at Downtown Yonge are working on exciting new initiatives which we would like to share with you:

Now entering next phase in our evolution

Work is underway in creating a new Strategic Plan to guide our initiatives over the next four-year Board term. We are moving away from a role of "improving" the area to that of leading, creating, and inspiring. Diversity, leadership, and energy are some of the words that are emerging to capture the essence of Downtown Yonge.

Winter Magic reaches a critical mass

Our significant investment in spectacular holiday decor and well-attended events is positioning Downtown Yonge front and centre during the holiday season. Winter Magic is now ripe for partners to capitalize on the unique experiences and crowds.

New focus on subway stations

Significant investment continues to be made in private property development and ground level streetscape improvements. Our subway stations at Queen, Dundas, and College, however, remain unwelcoming gateways to the district. Resources have been put in place to champion revitalization of the stations in the short, medium and long term.

A player in retail recruitment

Downtown Yonge now works closely with prospective retailers in connecting them with vacant space in the area. We have become a resource to the retail leasing field through our published listings of vacancies and our use of cutting-edge technology that counts pedestrian and vehicular traffic. The service is helping to locate new businesses here.

Planning for investment in the public realm

A new planning initiative is now underway. It recognizes that the larger Downtown Yonge area is made up of smaller and distinct precincts, each with their own characteristics and offerings. We are identifying public space projects that are ripe for investment, especially as a result of tremendous development activity that is emerging in the area.

Please take a few minutes to review our new initiatives for 2010. We welcome your feedback. We remain committed to the vibrancy of Downtown Yonge and appreciate your support.

Julia Lewis
Chair

James L. Robinson
Executive Director

WHO WE ARE & WHAT WE DO

Downtown Yonge Business Improvement Area is the association of businesses and property owners that is re-establishing the district as Toronto's premier business, shopping and entertainment destination. We are dedicated to maintaining the vitality of this area and protecting the new and existing investment that attracts shoppers, diners, tourists, businesses and employees.



Strategic Planning

2011 – 2014

2010 marked the final year of the 2007-2010 Strategic Plan for the Downtown Yonge B.I.A., and opened the doors on a new planning horizon for the B.I.A. – a chance to pause, take stock and pinpoint new strategic directions for the next four years.

Before embarking on the new planning process, a final review was held in June to pinpoint both successes and challenges of the 2007-2010 Strategic Plan and the most recent annual 2009/10 Action Plan. This effectively marked the “closing” of the past four years of strategic planning.

The new planning process was kicked off in August when a brainstorming session was facilitated with the Board by J.P. Lacroix of Shikitani Lacroix with the aim of pinning down a new Mission and Vision Statement for the B.I.A., as well as identifying the Strategic Imperatives that will drive the B.I.A. for the next four years. A workshop was also held with B.I.A. management in September.

Although still underway, key themes emerging from the brainstorming workshops reflect the idea of energy and vibrancy that is characteristic of the district, as well as the B.I.A.’s leadership role in inspiring and promoting growth in Downtown Yonge.

Once approved by the Board, the Mission, Vision and Strategic Imperatives will form the basis of the B.I.A.’s strategies and tactics in the 2011-2014 Strategic Plan.

The final 2011-2014 Strategic Plan is slated for completion in December 2010.



WINTER MAGIC

Downtown Yonge's Winter Magic series of holiday events and decor will be celebrating its fourth year this November. Winter Magic was created as Downtown Yonge's signature event, capitalizing on the busiest retail season of the year, while further activating the area. Our goal is to become a leading holiday destination across Canada and around the world.

Winter Magic is currently comprised of five events and dozens of lighting installations.



Window Wonderland (2009)

Ryerson Retail Management students are paired up with local businesses to create window displays on a budget of \$100.

- 75 participating students
- 25 windows
- 3,200 online votes
- Sponsored by Moneris Solutions

Ice, Wine & Dine (2009)

Elm Street comes alive with savoury food, festive drinks and live entertainment. 13 participating businesses



Illuminite (2009)

We set the Square ablaze with a spectacular lighting ceremony to kick-off the holiday season.



- 10,000 people in attendance
- Live coverage on Citytv during 6 o'clock news

Kidzfest (2009)

A weekend of fun for kids including rides, animals and their favourite television characters.

- 20,000 people in attendance
- Estimated economic impact \$195,435
- Local spending estimated at \$349,215



Buskertainment (new for 2010)

Throughout various locations in Downtown Yonge you'll find fire performers, illusionists, mimes, human statues, jugglers, stilt characters and more.

Holiday Lights

- 52,000 LED lights on our 40' sculptural light tree at Yonge-Dundas Square
- a three-dimensional sleigh and reindeer at the Yonge/College median
- 24 cross-street displays are suspended above Yonge Street
- decorative flames lit up atop Victorian lamp posts along Elm Street



Our charitable partner is Raising the Roof, as their mission aligns with Downtown Yonge's advocacy efforts – long-term solutions to homelessness. We helped them raise close to \$20,000 in 2009.

Traffic to wintermagic.ca (Oct 2009-December 2009)

40,213 (approx 13,400/month)

Visitors from 83 countries

140,231 page views

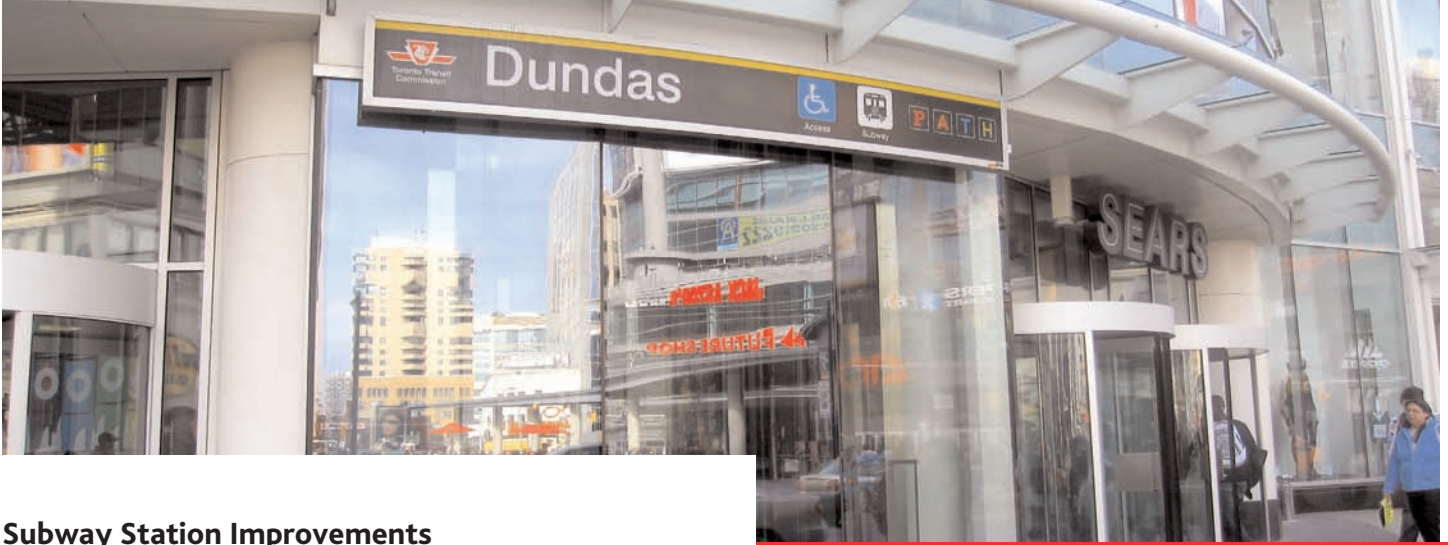
PR Reach (2009)

117 stories reported

Reach of 24,559,746

Advertising equivalency of \$242,765





Subway Stations

Subway Station Improvements



The Downtown Yonge B.I.A. is leading the charge to improve our three subway stations: Queen, Dundas and College. These gateways to our community are the oldest subway stations within the network and represent some of the largest traffic volumes within the system, yet these stations have not been renovated in almost 30 years.

The revitalization of the Downtown Yonge community at grade has been significant. During the first 10 years of this B.I.A.'s term, we estimate that over one billion dollars of improvements have been invested in our community through new development, redevelopment and renovations to existing properties. We have become increasingly concerned about the extreme disconnect between the significant improvements at grade and the continued deterioration of our subway stations below grade.

Detailed subway audits were conducted by the B.I.A., and key issues were identified and classified into short, medium and long-term goals as a means to tackle this large issue while also ensuring incremental improvements as follows:

Short-Term Goals: State-of-Good Repair

The B.I.A. conducts regular audits of the stations with key TTC personnel to identify and track progress on state-of-good repair issues, such as: maintenance, cleanliness, graffiti removal, broken furniture, lighting, and general repairs. These audits can be located on our website at: www.downtownyonge.com select "Advocacy" to view TTC Scorecard.

Medium-Term Goals: At Grade Improvements

The B.I.A. is working with the TTC to ensure the implementation of stairwell canopies for the street-level stairwell entrances that are open to the elements. We are also advocating for improved exterior signage that is clear and consistent in identifying the location of the various street level entrances to our three subway stations.

Long-Term Improvements: Station Modernization

A Subway Station Steering Committee was formed by our Board to spearhead this important initiative. The Steering Committee has donated significant time to this initiative, and is comprised of four volunteer Board Members: Our Board Chair, Julia Lewis – Ryerson University; Susan Allen – Cadillac Fairview (Toronto Eaton Centre); Winnie Jorgensen – GWL Realty Advisors (Toronto College Park); and Christopher Pluch – Hines (Atrium on Bay).

To date, the Steering Committee has overseen the commissioning of strategic design concepts for each of our three stations, and the hiring of OEB Enterprise, a leading public and government affairs group that will be leading an outreach campaign to all levels of government and key stakeholders within our community.

Our goal is to initiate "Smart Design" concepts that will provide a compelling business case to improve our subway stations while also providing revenue generating opportunities for implementation in our three subway stations as "Flagship" pilot projects for the next generation of subway stations.

We are actively seeking TTC commitment to work with us on these important pilot projects, and with the expertise of OEB Enterprise, we will be seeking funding to enable us to proceed with detailed design development in the new year. This will ensure a competitive tender process that will enable the completion of a business model required to secure funding for station modernization. Our target date for modernization of our three stations is by the start of the PanAm Games in 2015.

Public Realm Strategy

As Downtown Yonge continues to experience significant growth, the B.I.A. is undertaking a new planning initiative to provide guidance for future capital investment within the public realm. This Public Realm Strategy divides the B.I.A. into smaller precincts (special character areas) for the purpose of identifying opportunities for investments that reflect the area's diversity.

Downtown Yonge staff have invested extensive time in each precinct to better understand their unique characteristics, and how future investments could help enhance them. Preliminary mapping has been completed for each precinct, identifying site specific projects in relation to existing development sites, laneways, listed and designated heritage properties, and opportunities for bike-parking/bike-share programs.

Downtown Yonge staff is now engaging Board Members and community leaders through working-groups to gain consensus on the vision for each precinct. The final document will clearly identify projects for investment in the B.I.A., and create a list of site-specific projects for each precinct. When the Public Realm Strategy is adopted by City Council into the B.I.A.'s Community Improvement Plan, it will provide a mechanism for the City and local stakeholders to allocate resources to projects when developments or funding comes forward.

By making the Public Realm Strategy a priority, we will ensure that future development and growth in the B.I.A. will have the greatest positive impact.



Ongoing Initiatives

Clean Streets Team

• Sidewalk gum removal on both the east and west sidewalks of Yonge Street (between Dundas and Gerrard) will take place this fall. The B.I.A. is piloting a specialty gum remover machine as well as traditional power washing methods to remove gum, grime and stains from targeted sidewalks.



• The B.I.A. has just completed its first year of weekly graffiti removal that targets private property. A total of 82 properties have registered for the program as of September 1st, 2010.

CCTV



• The Toronto Police Service continues to provide a recorded system in the areas of Yonge and Dundas and Yonge and Gerard.

• Downtown Yonge remains supportive of this tool to enhance public safety.

Foot Patrols

• Both 51 and 52 Divisions of the Toronto Police Service (TPS) continue their commitment of providing foot patrols within the B.I.A., as well as using alternative patrol methods (bicycle and vehicular).

• 10 officers from each division are continually designated for patrolling the downtown core.

• Overall crime this year as of September 26th, 2010 is down by 6.8% in Division 51 and 10.9% in Division 52.



DAILY CLEAN STREET TASK

2010 RESULTS (FROM JAN 1 TO AUG 31)

| | |
|----------------------------------|-------|
| POSTERS REMOVED | 9,468 |
| BAGS OF LITTER SWEEPED | 1,325 |
| CARDBOARD REMOVED | 1,306 |
| GARBAGE BAGS COLLECTED | 527 |
| PUBLIC PROPERTY GRAFFITI REMOVED | 1,060 |

Yonge Watch



• The B.I.A. has just completed its first year of the Yonge Watch Security Network, which provides updates relating to crime, safety and security to B.I.A. members and their employees.

• Currently, there are 100 participants – ranging from property and business owners, to loss prevention and security personnel.

Yonge Street Lighting Project

• This year we completed the installation of new pedestrian and street lighting on Yonge Street from Gerrard north to our northern boundary at Grosvenor/Alexander (excluding College Park).

• Next year will mark the completion of this multi-year project with the installation of the new lighting on the west side of Yonge



Street in front of College Park.

• This final phase will include new landscaping which will feature groves of tree plantings with irrigation and new tree grates.

• New tree grates will be installed at all existing trees currently located on the east side of Yonge Street from Gerrard north to Alexander, and these existing trees will be replaced where required.

• Sidewalk reconstruction will follow in early summer and will mark the completion of the Yonge Street lighting project.

Banners

• Sponsored banner programs to-date include Coca Cola and the Olympic Torch Relay; Luminato and the NHL Face-Off event.

• Sponsored banner programs are a source of revenue for B.I.A. initiatives.



• Downtown Yonge and Winter Magic banners are a key part of the area's branding and place-making initiatives.

Discovery Team - Visitor Services (2010 season)

• 9 languages spoken

• 36,081 interactions

• 80 people on walking tours

• \$46,119 advertising equivalency of media coverage



Mobile Yonge iPhone app (as of August 2010)

• 2,857 downloads

• 11,004 visits

• New "Promos" section added



Yonge Buzz

• Bi-weekly e-newsletter on happenings in Downtown Yonge

• Sent to over 3,000 readers



Property and Investments Highlights



Paramount

- Located at 253 Yonge Street
- Opened September, 2010
- Quality Middle-Eastern cuisine

ING Direct

- The first ING DIRECT Café in downtown Toronto will be opening at 221 Yonge Street in early 2011, bringing 13,500 sq. ft. over three floors into the district. The Café space will feature:
 - A space to host community meetings.
 - Feature a Saver's Friend each month, which is a local retailer whose business is adding value to Toronto.



- Seminars that help members of the community learn how to become better Savers.
- A collaborative work space for ING DIRECT staff that need to work from downtown.
- Free WiFi access, coffee, tea, light snacks.

Toronto Eaton Centre

- Undergoing a \$120 million revitalization.
 - Main upgrades will focus on the Galleria and two food court areas.
 - New tenants include Victoria's Secret, Michael Kors, Stuart Weitzman and Mercato.



Maple Leaf Gardens

- This \$60-million development will be the new home of Ryerson University's athletic centre and a street-level Loblaw's grocery store.
- Scheduled to be completed in March 2011.



Black Star Photo Gallery

- Contains over 290,000 black and white photographs that document world events and personalities from the 20th century.
- The Black Star Photo Gallery will be located in the new Ryerson University Image Arts building at Gould and Bond streets. Once completed it will become a crucial cultural venue for Downtown Yonge and Toronto.



Ryerson Student Learning Centre

- Architects Snøhetta and Zeidler Partnership are working with Ryerson to design the new Student Learning Centre at Yonge and Gould streets.
- The new project will add new learning and library space to the Ryerson Campus, with retail at grade.



Aura

- Located on the northwest corner of Yonge and Gerrard streets, Aura is being developed by Canderel Stoneridge. At 75 storeys, Aura — slated to be the tallest condo building in Canada — will also bring three storeys or 190,000 sq. ft. of prime retail space into the district.
- Restaurants like Alice Fazooli's and Canyon Creek are expected to open for trade in the new building, as are Bed, Bath & Beyond and BMO.
- The developer reports that the development was sold out, just eight months after the launch in 2008.



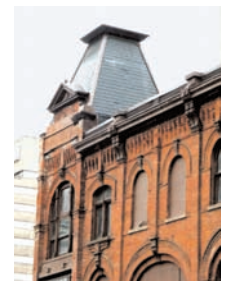
Sobeys at 777 Bay St.

- 2700 sq. ft. expansion to accommodate a new Sobeys.



335 Yonge Street

- On September 10th, 2010 City Council designated 335 Yonge Street as a heritage building.
- City staff continue to work on having the building secured, and reopening Gould Street to vehicles.



Proposed 2011 Budget Overview

Overall Budget 2011

The proposed 2011 budget follows from the Board and Management team's strategic directives. Core initiatives are continued. New initiatives are introduced and funded by a levy increase which is in-line with annual assessment growth of 5.6%. The proposed budget continues to provide good value to members in terms of impact. No other B.I.A. in Ontario provides the breadth of serviced provided by Downtown Yonge.

Budget theme 2011: "Stable and Smart"

Highlights:

- Subway Station Revitalization – resources to advocate for station improvements for the short, medium and long terms.
- Public Realm Strategy – in house resources to plan for future investment in the area's public spaces.
- Winter Magic – replacements of the Yonge Street cross-street displays with a new design to keep the programme vibrant.
- Fiber Optic Opportunities – investment in investigating revenue generating opportunities from installation of an underground fiber optic infrastructure.
- Pedestrian & Vehicle Counting – roll-out of counters beyond the Yonge-Dundas intersection; partnership opportunities for stakeholders.
- Public Relations – additional resources to position the district front of mind in the media and enhance public awareness.
- "We Care" Programme – the start of a new initiative to further connect stakeholders with partnership opportunities in Downtown Yonge.
- Streetscaping – the final phase of the Yonge Street roll-out of street and pedestrian-scale lighting, adjacent to College Park, in partnership with Toronto Hydro and the City of Toronto Economic Development Division.

REVENUE

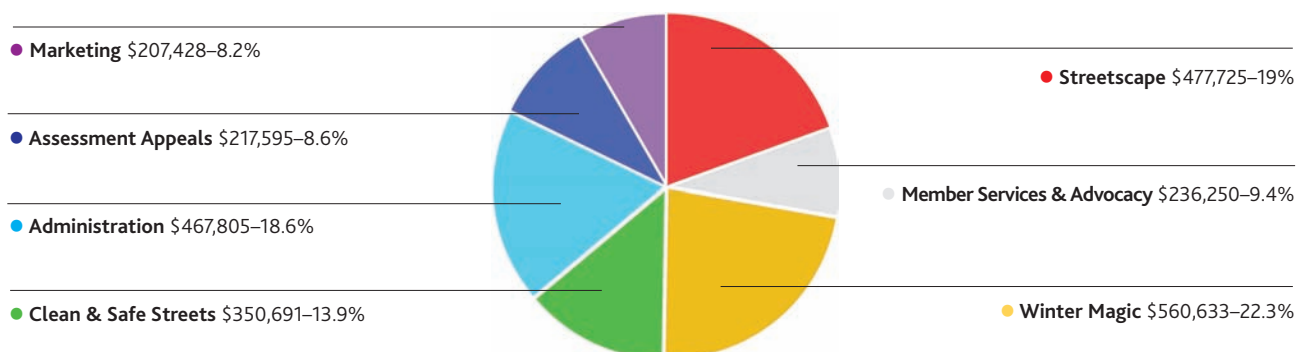
| | | |
|----------------------|-----------|------------------|
| B.I.A. Levy | \$ | 2,393,542 |
| Other Revenue | \$ | 124,584 |
| Total Revenue | \$ | 2,518,126 |

EXPENSES

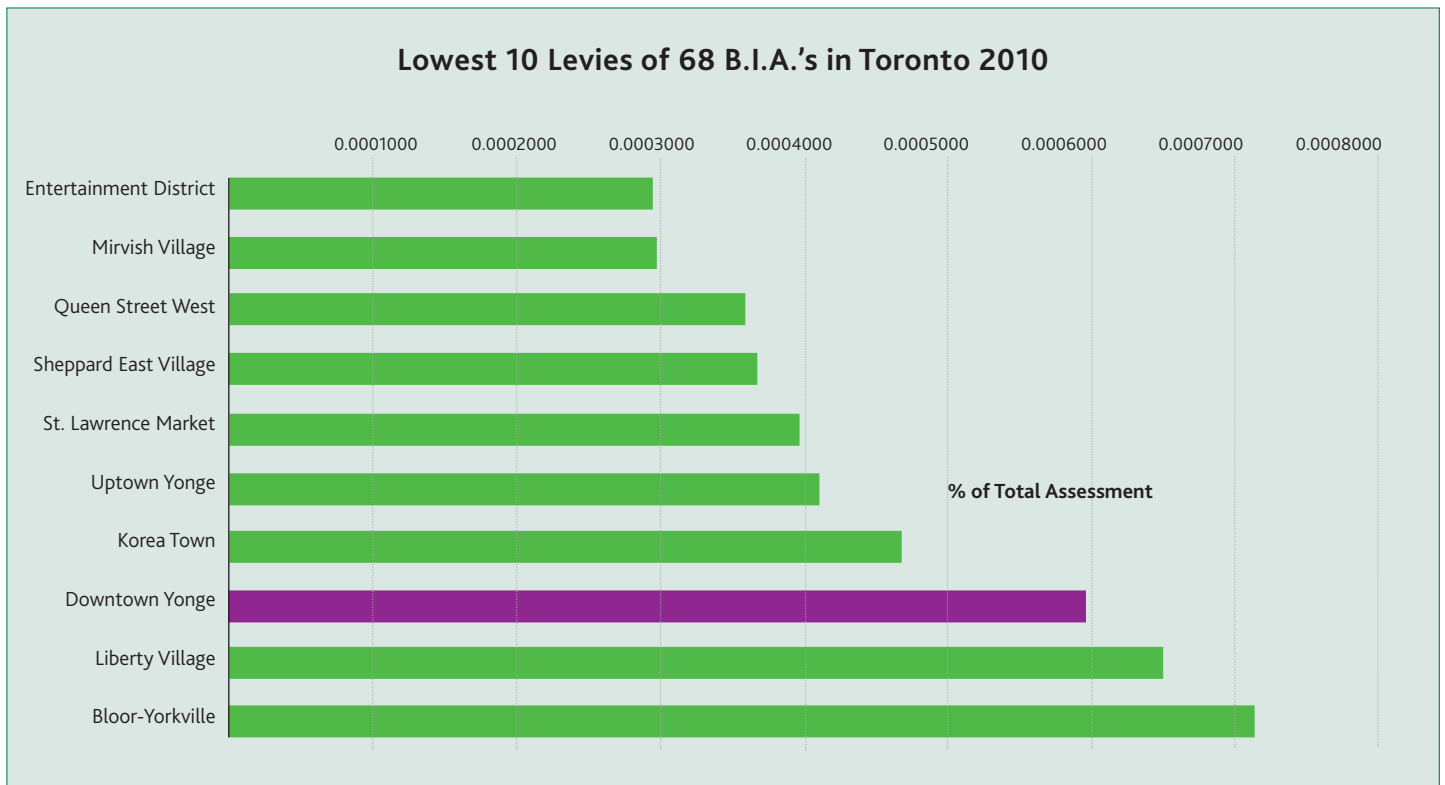
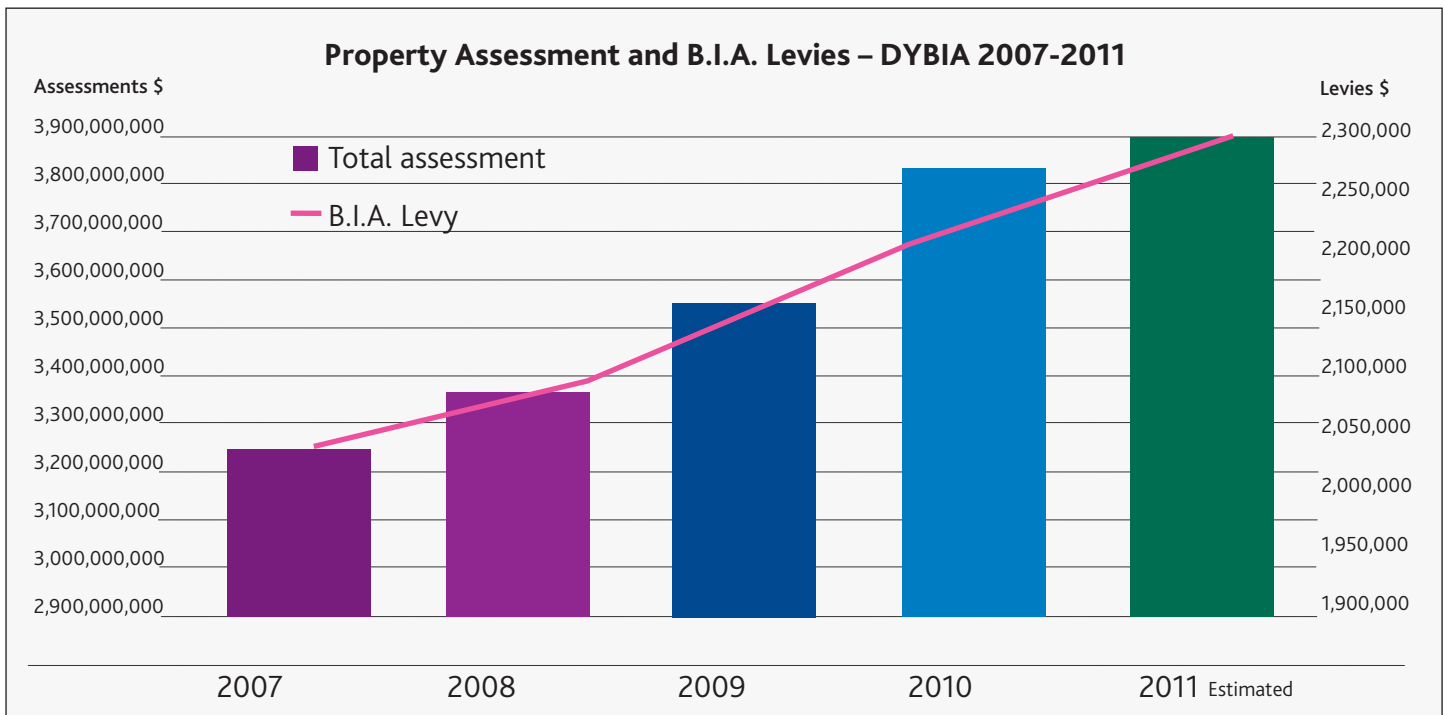
| | | |
|-----------------------------|-----------|------------------|
| Winter Magic | \$ | 560,633 |
| Streetscape | \$ | 477,725 |
| Administration | \$ | 467,805 |
| Clean & Safe Streets | \$ | 350,691 |
| Member Services & Advocacy | \$ | 236,250 |
| Assessment Appeal Provision | \$ | 217,595 |
| Marketing | \$ | 207,428 |
| Total Expenditures | \$ | 2,518,126 |

* Note – this budget is subject to final approval by the Members at the AGM & City Council.

2011 Budget by Expenditure



Property Assessments and Levies

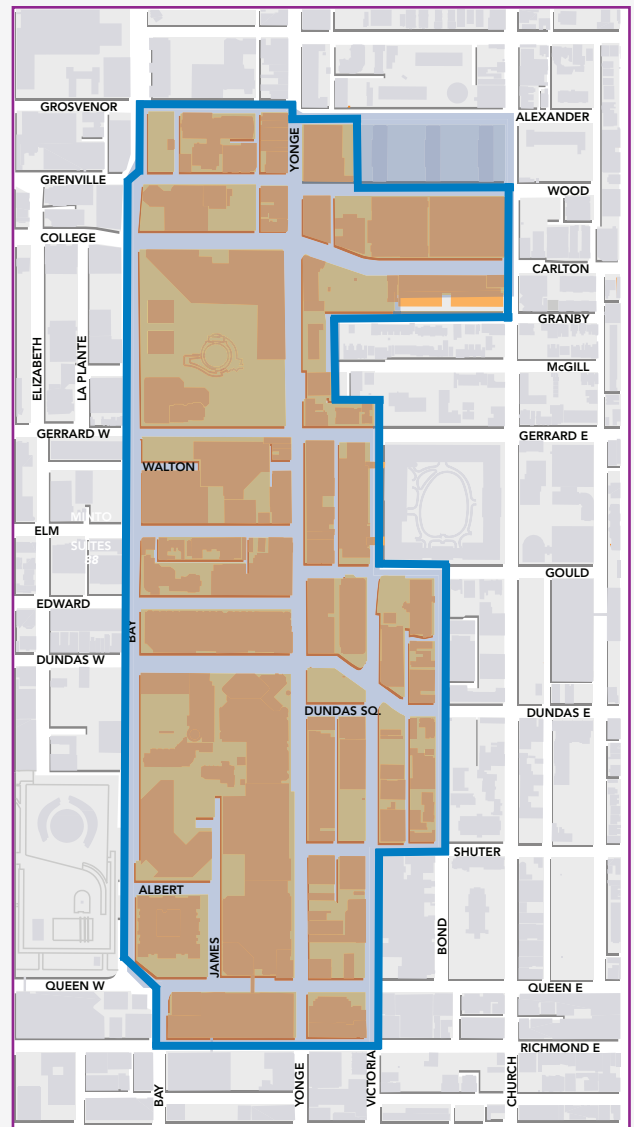




As a business or property owner, you have significant investment in your property, premises and staff. Downtown Yonge, as your local business association, is committed to enhancing your investment. As an association, we want to be sure we are serving your needs and providing good value. It is important that you, as a member of Downtown Yonge, are engaged and given the opportunity to work with other business leaders in setting the future direction for the district.

For a one-on-one meeting to discuss further involvement with Downtown Yonge initiatives, please contact:

James L. Robinson, Executive Director,
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or by email: jrobinson@downtownyonge.com



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