

113

project report

THE GREATER CHARLOTTETOWN URBAN AREA
OPPORTUNITIES STUDY

VOLUME I

THE CHARLOTTETOWN AREA DEVELOPMENT
PLAN

prepared for:

Canada Department of Regional Economic
Expansion, The Province of Prince Edward
Island, and The City Of Charlottetown

participating consultants

G. C. F. Shaw
E. F. Haites
S. I. Lyman
T. M. Zaharchuk

STEVENSON & KELLOGG, LTD.

In Association With:

Canadian-British Consultants Ltd.
Laventhol, Krekstein, Horwath & Horwath
Sunderland, Preston, Simard & Associates

December 1973
avs.

HT
169
C32
C4
v.1

STEVENSON & KELLOGG, LTD.

management consultants

HT
169
C32
C4
v.1

TABLE OF CONTENTS

<u>Chapter</u>		<u>Page</u>
I	INTRODUCTION	1
II	ECONOMIC OPPORTUNITIES AND PLANNING PRIORITIES	
	A. The Elements Of Development Planning	5
	1. Define Objectives	6
	2. Segment The Economy Into Groups Of Economic Activities Or Sectors	7
	3. Forecast Economic Activity In Each Of The Sectors	8
	4. Select Growth Opportunities	8
	5. Design An Implementation Scheme Which Best Satisfies The Objectives Of Economic Planning	9
	B. Economic Opportunities Determine Planning Priorities	
	1. The Need To Appraise Opportunities Realistically	9
	2. Basic and Non-Basic Economic Activities	10
	3. Economic Priorities	12
	C. Plan For Implementation	
	1. Organizing For Implementation	13
	2. Logic Network Plan	16
	3. Outline Of A Plan Of Action	20



Table of Contents - cont'd.

<u>Chapter</u>		<u>Page</u>
III	OUR EXPECTATIONS FOR THE CHARLOTTETOWN AREA IN THE FUTURE	26
	A. Economic Vital Statistics	
	1. Population Growth	27
	2. Labour Force	28
	3. Personal Income	32
	4. What This Means For Charlottetown	33
	B. The Service Centre Role	34
	1. Retail Trade	34
	2. Community, Business And Personal Services	36
	C. The Tourist Centre Role	37
	D. The Conference/Seminar Role	40
	E. The Light Manufacturing Role	43
	F. The Growth Sectors: A Need For Public Priorities	46
IV	PHYSICAL PRESENCE FOR THE CHARLOTTETOWN AREA	52
	A. The Natural Features	53
	B. Directions For Public Policy	56
	C. Charlottetown Square	58

Table of Contents - cont'd.

<u>Chapter</u>		<u>Page</u>
V	RECOMMENDED ACTIONS	71
	A. A New Hotel Facility	71
	B. Restaurant	72
	C. Theatre	73
	D. Charlottetown Square	73
	E. Retail Merchandising Centre For Handcrafts	76
	F. Tourist/Conference Manager	77
	G. Industrial Park	77
	H. Circulation and Parking Facilities	77
VI	FUNDING REQUIREMENTS--PUBLIC AND PRIVATE	78

Table of Contents - cont'd.

TABLES

<u>Number</u>		<u>Page</u>
1	Sectoral Composition Of The Labour Force Of The Greater Charlottetown Urban Area 1951 - 1985	30
2	Tourist Expenditures In Charlottetown - 1971	38
3	Employment Generated In The Charlottetown Area By Tourist Spending - 1971	39
4	A Comparative Analysis Of Conventions Held In Three Atlantic Province Centres	42
5	Summary Of Conventions Held In The Charlottetown Area, 1967-1973	44
6	Estimated Private And Public Funding Requirements And Suggested Phasing For The Greater Charlottetown Urban Area Opportunities Implementation	79

FIGURES

1	Suggested Organization Structure To Implement The Charlottetown Area Development Plan	17
2	Greater Charlottetown Urban Area--Development Opportunities Logic Network	18
3	Existing Land Uses	55
4	Charlottetown Square	57
5	Suggested Treatment--Central Charlottetown	60
6	Great George Street	61

Table of Contents - cont'd.

FIGURES - cont'd.

<u>Number</u>		<u>Page</u>
7	Suggested Waterfront Development	62
8	The Waterfront	63
9	The Waterfront	64
10	The Waterfront	65
11	Confederation Centre	66
12	Confederation Centre	67
13	Commercial Area Renovation	68
14	Charlottetown Area Buildings	69

o0o

INTRODUCTION

Prince Edward Island is no stranger to economic planning. Formal planning experience began in 1969 with the completion of the Development Plan Agreement between the federal and provincial governments. Judging by its initial success in the province, economic planning has become a fact of life and will likely continue beyond the initial 15-year scope of the Agreement.

The Greater Charlottetown Area Opportunities Study is a component of the larger economic planning exercise in the province. It is designed to provide a comprehensive assessment of economic opportunities available for the citizens of the Greater Charlottetown Urban Area (Charlottetown area). From this assessment, we will propose a "balanced scheme" of economic development for the city. And since the Charlottetown area is the largest centre of economic activity in P. E. I., we expect that the Opportunities Study will occupy an important niche in the overall provincial effort.

However, the Opportunities Study must be viewed within the context in which it has been carried out. It is designed to play a number of specialized roles for economic planning in P. E. I:

- ▶ It is not an economic planning exercise per se, but has an advisory scope and sets out recommendations for public policy.
- ▶ It contains recommendations for a regional plan, which must be woven into the provincial development fabric. This in turn will be extended into the realm of negotiations between provincial and federal levels of government for implementation under the terms of the 1969 Agreement.
- ▶ Its recommendations were framed under the direction of a tri-level government committee, which contained representatives from federal, provincial, and municipal levels of government. This has obvious implications for future implementation of recommendations.

Because of this perspective, which has been derived from our specific mandate, we view the study as being principally a blueprint for future action. An institutional or administrative framework is still required before the plan can be carried out.

During the study period, our consortium worked closely with the Steering Committee who provided leadership and guidance by reacting to the study as it was being formulated. It had a profound influence on the final outcome. A similar role was played by the Area Development Committee, which was able to provide the consultants with another important perspective on their work.

The three volumes of the Greater Charlottetown Area Opportunities Study contain a comprehensive analysis of economic opportunities available to the area. Volume I, the Charlottetown Area Development Plan, is intended to summarize the conclusions and recommendations of the five separate and detailed inquiries into opportunities in the service, light manufacturing, tourism, and conference sectors, as well as provide a physical development plan. The summary positions the recommendations within the context of a total economic development plan.

Volumes II and III contain the substantive research material from which the Development Plan was formulated. The material in the two volumes has been arranged in a logical sequence. Volume II portrays the Charlottetown area as a service and light manufacturing centre. Since opportunities in these areas are related to economic and demographic variables, the volume begins with various forecasts of population, labour force, and personal income.

Volume III describes the Charlottetown area as a Tourist and Conference/Seminar Centre. It also contains our comments on land and building use, the "Charlottetown Square" concept, service requirements, and traffic and parking considerations and recommendations.

In this volume, we outline a suggested plan for implementation, including organization structure, network plan, and an outline of a plan of action necessary to achieve our expectations for the Charlottetown area in the future. We include summary data on the area's vital statistics, information on the characteristics of the Charlottetown area as a service centre, a light manufacturing centre, and as a tourism/convention centre. The data are combined and further analyses are performed to justify our designation of economic priorities in the growth sectors.

Our characterization of the future of the Charlottetown area is important. It is the fundamental set of assumptions which pervade all our recommendations.

We also discuss the physical presence recommended for the Charlottetown area. These particular recommendations have been conditioned on our assessment of economic opportunities for the Charlottetown area. This includes a description of the Charlottetown area's natural advantages, the importance of the "core area" in our economic development plan, and comments on a direction for public policy.

We then highlight our recommendations for the four Charlottetown area future "roles". Our suggested phasing and the costs involved to effect their implementation are also provided in tabulated form.

The Charlottetown Area Opportunities Study is designed to produce a plan for the Charlottetown area. The study area consists of the City of Charlottetown, and six surrounding municipalities. Yet in our physical development strategy, we have placed a great emphasis on the Charlottetown core area, which is entirely contained in the City of Charlottetown. There are good economic reasons for this emphasis. These are:

- ▶ We have concluded that most of the physical assets in the Charlottetown area are located in the City core. This is particularly true for opportunities in tourism and the retail trade sector.
- ▶ The city core is the centre of work and entertainment for the Charlottetown area. The outlying areas, with some exception, are principally places of residence. Given its functional importance to the Charlottetown area, the city core is in greater need of physical planning.
- ▶ The Charlottetown area is not endowed with so many economic opportunities that it can afford to spread them over a large area, thereby losing some of the advantages of concentration.

- ▶ The Charlottetown area is a small region, composed of municipalities formed through a combination of historic influences and administrative expediencies. But the economics of the region is such that any program which helps Charlottetowners in the core area, also helps the residents of the six adjoining municipalities.
- ▶ Although some problems exist, generally the traffic and parking facilities in the Charlottetown core area will support increased activity.

Two different types of growth in urban areas have been witnessed by urban historians:

- ▶ Before the advent of the automobile, urban growth forces were centripetal, or focussed inward, on the urban core.
- ▶ After the automobile, urban growth forces became centrifugal, and the large city spawned suburbs and suburban shopping districts.

One of the unhealthy aspects of centrifugal growth in post-war North American cities was its impact on urban core areas. Driven by the twin forces of economics and demography, the core areas became characterized by slums and various types of urban blight.

We have been astounded to discover that Charlottetown is infected with the same disease as large North American cities. Its core area is depressed. Most of the trends of new building and commercial activity seem to be centrifugal. This is an unhealthy sign. Charlottetown is not large enough to be overcome by the disease of size. Fortunately, the core area of Charlottetown has not yet become irredeemably depressed and beyond hope of repair. The recommendations of the development plan state our belief that it can and should be redeemed.

II

ECONOMIC OPPORTUNITIES AND PLANNING PRIORITIES

A. THE ELEMENTS OF DEVELOPMENT PLANNING

There are many "standard" approaches to economic planning. Although the words may vary, all approaches have a similar sequence of procedures. These can best be described with a set of linked questions, asked by planners in the preparation of the plan. These are:

- ▶ What is the present situation in the "area" for which we are developing a plan? How has this situation evolved? For this initial step, we require a set of economic "descriptors" which provide a statistical reference for the prevailing economic conditions.
- ▶ In the absence of any concerted public attempt to change the "situation", how do we expect it to change over time?
- ▶ What are the goals and objectives for the "area"? More specifically, what do we want the situation to look like on some future date?
- ▶ Does the anticipated future match the desired future? If not, what economic and social constraints affect the achievement of objectives?
- ▶ What combination of strategies will best contribute to the attainment of the desired future situation? By what criteria are these strategies to be chosen? Three criteria on which strategies can be developed are:
 - What are the total public resources available to the plan? These are, to a large degree, determined in PEI by federal-provincial agreements.
 - What are the economic constraints affecting the sector for which we are planning? Constraints

such as location and market demand will have a binding affect on the future potential in the economy.

- What is the desired ratio of private to public operations in the market? This is a fundamental philosophic question affecting the degree to which direct and indirect public postures will be invoked in the plan.
- ▶ How will the strategies be implemented and time-phased? We must anticipate private sector responses to initiatives by public authorities.

In the Economic Opportunities Study, we perform most of the standard functions ascribed to the economic planning exercise. However, we have developed a special emphasis. This was determined in part by our terms of reference, and by the study's role in the broader PEI context. The study, and its supporting analyses, are designed to accomplish five general tasks.

1. Define Objectives

We superimposed a general economic objective over all activities of the Opportunities Study. It outlines a scheme for balanced economic development, one which can be expected to maximize the growth of income and employment, consistent with the existing social, political and environmental conditions. We do recognize, however, that no group of experts can adequately interpret "social, political and environmental conditions". We have attempted to make these as explicit as possible and expect that the study will come under the scrutiny of public debate, prior to implementation.

The economic plan for the Charlottetown area must recognize a need to provide an appropriate balance between material wealth and healthy environment, and of work and leisure. In recent years there has been in Canada and other countries a dramatic shift of attention from material wealth to concern about the environment and the quality of life. The people of PEI have been exceptionally fortunate;

while enjoying a standard of material welfare comparable to that of many industrial parts of the world and superior to that of millions of people throughout the world, they have been spared the horrors of the boxes of cement, aluminum and glass of industrialized Canada -- the air, water, noise and sight pollution and overcrowding. We have been engaged in numerous conversations with people in all walks of life in the Charlottetown area, and other parts of the Island, and have carried away a firm impression that the Islanders consider the preservation of their environment and way of life as one of the prime goals of economic development.

On these grounds, we have made this goal one of the cornerstones of our study. If occasionally our recommendations appear timid and the prospects seem modest, it should be remembered that we are satisfied that we have not advised Islanders to forsake a birthright. We do not consider our role as consultants to push single-mindedly towards more material wealth, but rather to make recommendations for policies that will best conform with the aspirations and goals of the people we have been asked to serve.

2. Segment the Economy into Groups of Economic Activities or Sectors

Our analysis focuses on the Charlottetown area's role as:

- ▶ a provincial and regional service centre
- ▶ a light manufacturing centre
- ▶ a tourist centre
- ▶ a centre for conferences, conventions and seminars.

This is a logical separation for analysis. Each role, or sector, can be treated separately and can be further separated into a number of unambiguous activities.

3. Forecast Economic Activity In Each Of The Sectors

For each sector, where appropriate, we separated economic activities into finer divisions, or sub-sectors, then performed forecasts to 1985. The forecasts fulfill two functions: They are designed to identify current trends in the economy, and isolate those sectors where public stimulus can best contribute to the economic development potential. The forecasts then establish which economic activities in the Charlottetown area have a "comparative advantage" and can be expected to act as forces of economic progress.

4. Select Growth Opportunities

From our forecasts of expected economic activity in the major economic sectors of the Charlottetown area, we selected a number of growth opportunities for the Charlottetown area. The selection is based on a number of criteria.

- ▶ Natural or comparative advantages determine fundamental priorities. For example, the Charlottetown area must play an important role as a provincial service centre. This role is determined by its natural economic conditions. Our recommendations reinforce the importance of these conditions.
- ▶ Recommend feasible alternatives. There are obvious constraints affecting the exploitation of growth opportunities. The availability of public and private capital is a fundamental constraint. The opportunities which we select must fall within the boundaries of these constraints.

5. Design An Implementation Scheme Which Best Satisfies The Objectives Of Economic Planning

After economic opportunities are identified in the four sectors, we assessed public and private investment requirements and developed an implementation scheme. Since implementation tasks must be ordered in a logical sequence, we developed a plan for implementation.

B. ECONOMIC OPPORTUNITIES DETERMINE PLANNING PRIORITIES

1. The Need To Appraise Opportunities Realistically

The title of this study describes its major thrust. It is the Charlottetown Area Opportunities Study, and represents a systematic search for economic opportunities available to the Charlottetown area. It is an economic plan to the extent that we can develop a scheme for exploiting these opportunities for the benefit of the citizens of the Charlottetown area.

We have a basic philosophy of economic planning. That is, we feel that a realistic assessment of economic opportunities is the most important component of planning. The importance of taking a realistic, hard look at the available opportunities is obvious. It stems from a shortage of two crucial resources necessary for economic development:

- ▶ There is always a shortage of both public and private capital. This is particularly true for P. E. I. and the Charlottetown area, which have only recently begun to show rapid economic progress.

- ▶ There is a need to establish a pattern of success in both private and public enterprise. It is essential to alter a climate of investment in the Charlottetown area which has been pre-conditioned by the entrepreneurial failures in the past.

In view of the limitation of resources, economic development planning should always begin with a major analysis of opportunities. This contrasts with the grandiose schemes often contained in economic plans, which bear no resemblance to the realities of the local economic situation. We have founded our study on economic realities, in the belief that there is no room for waste of public or private resources in the Charlottetown area. Thus, the analytic substance of our enquiry is the "feasibility study concept", wherein the hard rules of economic logic are applied to every opportunity assessed. The development scheme which we propose is derived from these analyses.

2. Basic And Non-Basic Economic Activities

The search for economic opportunities is the basis for our economic planning exercise. The economic feasibility of each major opportunity is a touchstone for analysis. This is the micro-analytic reference for the study applied at the level of the individual enterprise. The study also requires a macro-analytic base. This will be used to weigh the importance of "sets of opportunities" in the development of a general strategy of economic development.

We have adopted a particular macro-analysis format in our study of economic opportunities in the Charlottetown area. This is derived from a particular theory of economic development. It requires a further classification of economic opportunities, separating them into "basic" and "non-basic" activities.

The distinction between basic and non-basic activities is simple. Goods and services sold to non-residents are exported. The employees needed to produce these exports constitute the area's "basic" employment. Persons producing goods and services for residents of the area constitute its "non-basic" employment. Economic growth in the non-basic sector tends to be uniquely related to growth of population and per capita income in the area.

The growth strategy for the Charlottetown area must satisfy a particular balance between the promotion of basic and non-basic activities. The importance of balance in this relationship can easily be shown through a simple illustration. An economy, totally dependent on non-basic economic activities, has only one determinant of progress. Economic growth depends entirely on growth of population and personal income. The Charlottetown area is characterized by heavy out-migration of population in the lower age brackets. This is caused by low levels of personal income in the Charlottetown area, relative to that of other areas in Canada. The demographic and economic factors, in turn, cause low growth in the non-basic economic sectors. Since the economy is heavily dependent on the non-basic sectors, stagnation in this area is self-reinforcing.

There is clearly a need for balanced growth between the basic and non-basic sectors. Total dependence on the non-basic sector will produce a "vicious circle" where low levels of economic activity will be reinforced. There is a need for a dynamic burst of activity in a basic sector to break a link in the vicious circle. Economists call this a "leading sector", or a basic force in economic development.

Thus, our economic strategies have been developed at two separate levels of analysis:

- ▶ At the macro level, we establish general priorities of development between basic and non-basic economic activities.
- ▶ At the micro level, we identify specific economic or business opportunities which should be exploited in the course of the development plan.

3. Economic Priorities

From our analysis of economic opportunities in the Charlottetown area, we formulated a number of strategic priorities for economic planning. These are:

- ▶ The tourism/conference centre opportunities are basic sector priorities. They involve the sale of services to non-residents. From our study of market demand in the tourist and convention area, we conclude that this sector promises an exciting set of opportunities for the Charlottetown area.
- ▶ The Charlottetown area's role as a service centre promises an equally exciting future. This can be viewed as a basic sector, insofar as the Charlottetown area is providing services to other parts of P. E. I. Also, there is a relationship between service sector activities and growth in the tourism sector.
- ▶ Light manufacturing opportunities are limited at this point in time. We have identified no significant opportunities which can reasonably be expected to succeed in the immediate future. Although we make some recommendations for improvements in the light manufacturing sector, we feel that opportunities in other sectors have a greater immediate priority for economic planning.

Recommendations for the exploitation of opportunities within the context of these priorities, follow in other sections of this report.

C. PLAN FOR IMPLEMENTATION

1. Organizing For Implementation

The successful implementation of the Development Opportunities Plan for the Greater Charlottetown Urban Area will depend largely on the organization charged with this responsibility. In considering approaches to this question, we see three possible organizational structures. These are:

- ▶ Retain the existing tri-level steering committee and appoint a full time development plan manager.
- ▶ Establish two new committees: one responsible for the service sector and light manufacturing development, and the other for developing the tourism/conference, and Charlottetown Square ideas, with a part time secretary to expedite, co-ordinate, and record action.
- ▶ Establish a Charlottetown Area Development Corporation under the Companies Act of Prince Edward Island, R. S. P. E. I. 1951, C. 26.

On considering the first alternative, we noted the following negative features:

- ▶ all of the development plan "eggs" would be in one basket;
- ▶ it could be difficult to identify a suitable candidate for the position of development plan manager;
- ▶ this would not be a permanent position-- therefore would not necessarily attract the right calibre man.

Our evaluation of the second approach revealed that the positive features well out-weighed the negative features. We noted the following features in our considerations of this question:

Positive Features

- ▶ Introduces the community as a whole--as the fourth level.
- ▶ Offers a greater scope for the division of labour and specialized talent.
- ▶ Affords easy access for the Treasury Board to the committee(s), and control of finances.
- ▶ Permanent secretary--could be part time position--but responsible for expediting and co-ordinating.

Negative Features

- ▶ Suffers from the disadvantages common to all committees.

The third alternative, that of establishing a Development Corporation, appears to offer the following positive and negative features:

Positive Features

- ▶ A Development Corporation would be in a strong position to negotiate for both public and private funds.
- ▶ It affords the continuity necessary for a long range development plan.

- ▶ As a corporation operating full-time, it could have the effect of accelerating development, providing closer monitoring and direction in all aspects.
- ▶ Could have the same representation on its board of directors as outlined in the two committee system suggested in alternative 2.
- ▶ Would not suffer from the disadvantages common to all committee-directed implementation.

Negative Features

- ▶ Introduces another crown corporation into the development of the Charlottetown area.
- ▶ May necessarily have a short life span, and could therefore not attract the qualified personnel required for effective implementation.

During the course of our study, we considered the possibility of having the Charlottetown Regional Development Committee, now in its formative stage, to act as the development plan implementation committee. After discussing this possible role for the Regional Committee with members of the Steering Committee and others in the Charlottetown area, we feel that the negative features tend to rule against this Committee as being the logical responsible body for the implementation. The two prime negative features against their involvement are:

- ▶ we understand that the Committee is to be mainly planning, not development, oriented;
- ▶ the possible vested municipal interests:

- the main thrust for opportunity development is concentrated largely in the central area of Charlottetown;
- This committee would not have as easy access to provincial and federal funds.

In Figure 1 we present a suggested organization structure to implement the Charlottetown Area Development Plan. This organization shows our second alternative, with two committees reporting to the Steering Committee. We see the Steering Committee as continuing to monitor, direct, advise, and control the two sub-committees during the implementation stage. This will be necessary in view of the need to establish priorities on funding and maintaining the necessary liaison with the three levels of government involved in the process.

We believe that either alternative 2 or 3 would ensure the effective implementation of opportunities accepted by the Steering Committee. The Steering Committee should give careful consideration to all of the positive and negative features associated with both, in making the decision as to the group who will assume the implementation responsibility.

2. Logic Network Plan

In an attempt to offer guidance in the implementation stage, we have prepared a logic network, which suggests the sequence of activities and the interrelationship that would exist between the three chains of activities involved. This network is shown in Figure 2.

FIGURE 1

SUGGESTED ORGANIZATION STRUCTURE TO IMPLEMENT
THE CHARLOTTETOWN AREA DEVELOPMENT PLAN

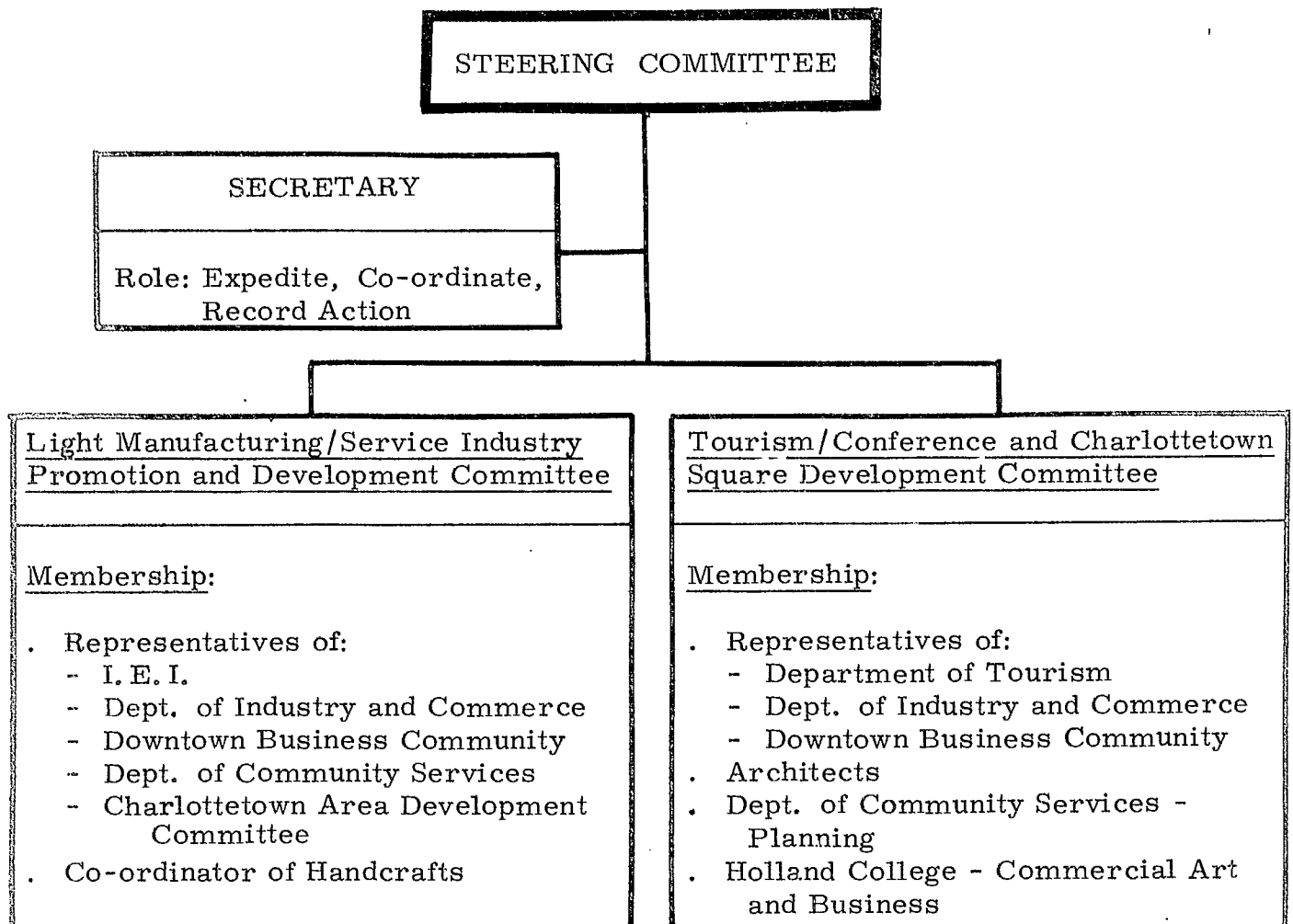
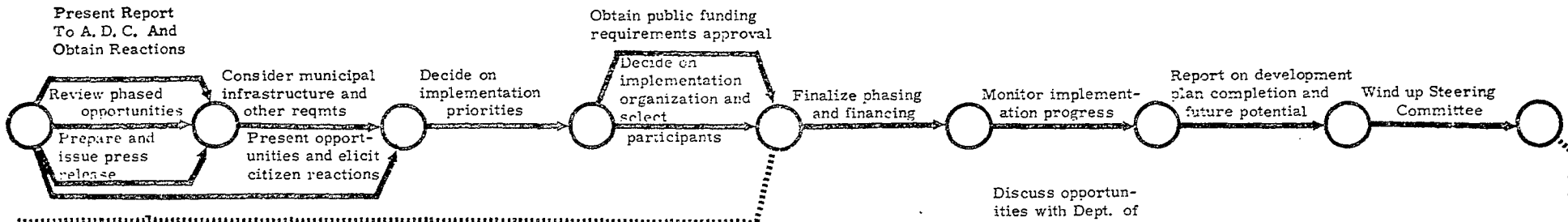


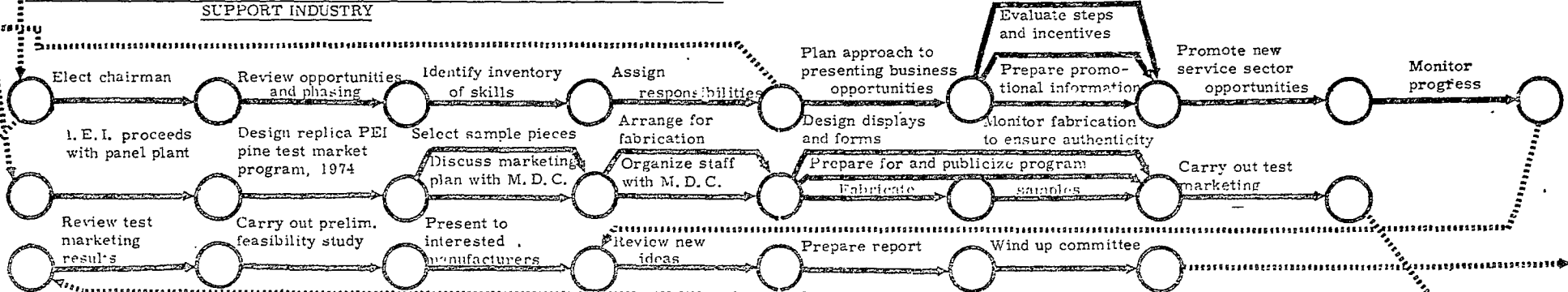
FIGURE 2

GREATER CHARLOTTETOWN URBAN AREA
DEVELOPMENT OPPORTUNITIES IMPLEMENTATION LOGIC NETWORK

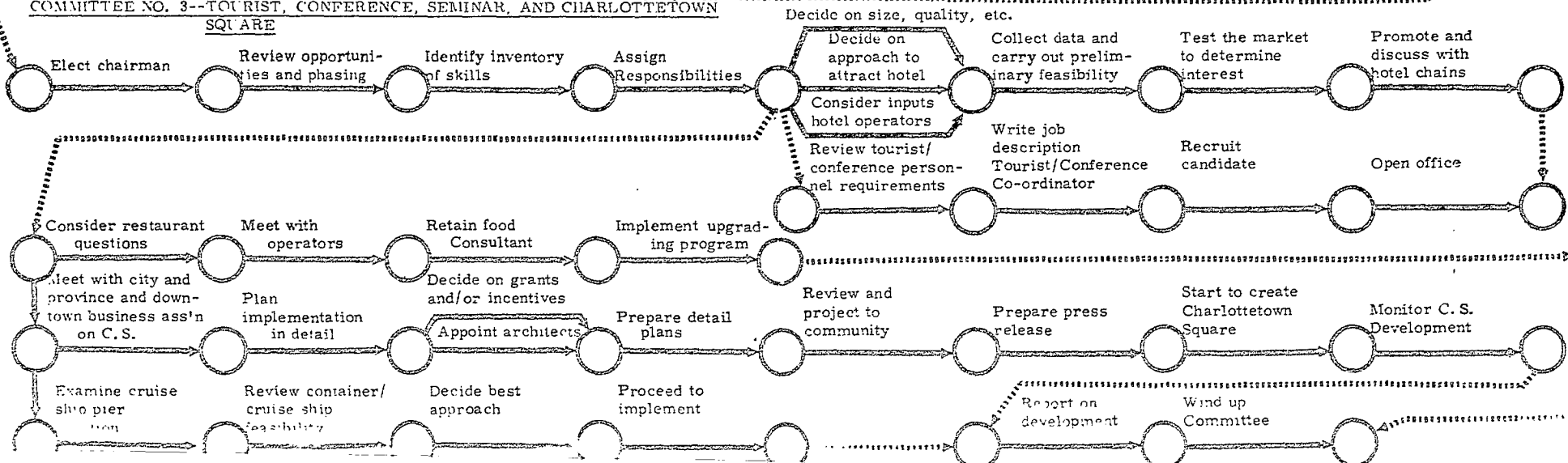
COMMITTEE NO. 1--DEVELOPMENT OPPORTUNITY STUDY STEERING COMMITTEE



COMMITTEE NO. 2--SERVICE CENTRE, LIGHT MANUFACTURING, AND RESOURCE SUPPORT INDUSTRY



COMMITTEE NO. 3--TOURIST, CONFERENCE, SEMINAR, AND CHARLOTTETOWN SQUARE



In our network example, we have shown the responsibility for implementation vested with three committees:

- ▶ Committee 1-The Development Opportunities Study Steering Committee, retains an on-going responsibility for the implementation of those opportunities that they have agreed to implement.
- ▶ Committee 2 promotes the opportunities for the Charlottetown area in the service centre, light manufacturing and resource support industry.
- ▶ Committee 3 is involved in implementing the accepted recommendations for the area as a tourist, conference, seminar centre, the Charlottetown Square concept and the related services, parking and traffic flow improvement.

We offer this network plan only as a preliminary outline of the possible steps and their order in planning the implementation process. It is obvious that the order of activities and the detail may necessarily be expanded or contracted, depending on the selection of and priorities for, opportunity implementation. It should be noted that neither have we attempted to estimate times, nor have we scheduled these activities in relation to the time phasing suggested in our schedule of private and public funds requirements.

3. Outline of a Plan Of Action

a) Municipal Legislation

Implementing the Charlottetown Area Development Plan will require the combined thrust of all three levels of government, the Area Development Committee, the Downtown Businessman's Association, and the citizens of the Charlottetown area at large. A key element in the successful development of the role of the Charlottetown area as a service centre and a tourist/convention centre is the creation of "Charlottetown Square". This concept will focus attention on the centre core area, enhancing its natural features, linking the waterfront to the business and cultural sections.

The creation of Charlottetown Square should be undertaken in the context of a comprehensive plan for the Greater Charlottetown Urban Area. Agreement must be reached between the municipalities and senior governments on regional policies concerning land use, transportation, water supply, pollution abatement, and the role of the Charlottetown area in provincial economic development. Without this agreement which should be made known to all concerned, the possibility of success in implementing the Charlottetown Square concept may be in jeopardy.

This is not to say that steps cannot or should not be taken immediately to implement proposals. Concurrent with initiating Charlottetown Square should be the preparation of a municipal or regional development plan.

Once this regional plan has been officially adopted, then Charlottetown Square will form part of the plan. The Square is then in a position to receive public funding and is subject to public acquisition, sale and lease of land in order to develop the plan. Although the Planning Act does not prohibit the passing of a zoning by law or other by laws to regulate development which are not based on official plans, it clearly visualizes them as being designed to achieve the policies and objectives of an official plan. They are, therefore, instruments by which a plan is implemented, and not plans in themselves.

The Charlottetown zoning by law is not based on an official plan and, as a result, is subject to arbitrary change. In addition, it is cumulative in that as the zones progress from "Residential - 1" through to "Industrial", the succeeding zones allow development covered by preceding zones. This is, in fact, no zoning at all, and these two factors, arbitrariness and irrational permissiveness, ensure the ineffectiveness of the existing zoning by law in regulating development within Charlottetown Square. We see the immediate order of priority in terms of legislation required to be:

- ▶ Pass an amendment to the zoning by law creating Charlottetown Square with specifically designated zoning regulations. These regulations appear in Appendix A.
- ▶ The committee charged with the responsibility of implementing Charlottetown Square will comment and report on all development

proposals submitted to Council and referred to the Planning Committee. The Committee would report to Council through the Planning Committee.

- ▶ Once the official plan for the Charlottetown Square has been accepted, a specific zoning by law related to the plan should be passed. Other regulations relating to building occupancy standards and the preservation of buildings, lands, and views should also be passed.

These possible courses of action are presented for consideration. Our terms of reference did not provide for the depth of investigation required to establish the precise form of legislative action required to establish the precise form of legislative action necessary. Our suggestions, therefore, merely indicate the scope and direction that legislation may take.

b) Municipal Infrastructure Requirements

In Volume III of this report we have examined the municipal services related to the economic opportunities. Here we consider the municipal servicing requirements for the municipal units in the Charlottetown area that are, perhaps, of equal import to the life of residents in the area. These requirements will have to be borne in mind in establishing the funding of all priorities whether part of the development plan or not.

Hillsborough Village and the existing Riverside Hospital receive water through a 10 inch diameter main connected to the City of Charlottetown water distribution system. This main, installed in 1931, has insufficient capacity to meet future requirements of Hillsborough Village and the proposed new Riverside Hospital.

The Parkdale Industrial Park is supplied from the Parkdale Wells and distribution system. Future growth in industrial and residential demands indicate that an additional well is required next year. In addition, a new reservoir and strengthened distribution system will be required to meet future fire service demands.

We feel that the Charlottetown distribution system could, through the proposed transmission main connecting the wells on Brackley and Union Roads, supply Hillsborough Village and the proposed Riverside Hospital. The logical route for this main is in a southerly direction on the eastern side of the airport from a point near the Union pumping station. It will connect with the existing transmission mains south of the Charlottetown reservoirs. This routing would provide an excellent supply to both Hillsborough Village and the proposed Riverside Hospital, and would pass through the village of Parkdale. The main would be about 25,000 feet of 24 inch diameter pipe at an estimated cost of \$1 million.

Integration of the Parkdale and Charlottetown water systems would obviate the need for the proposed addition to the Parkdale system. Charlottetown's fire storage could easily satisfy Parkdale's requirements. The new transmission main passing through Parkdale would have sufficient capacity to meet fire service demands. This approach would eliminate the need for a new main from the existing Parkdale reservoir.

Moreover, construction economies could be realized on the new Charlottetown main if the Parkdale water system could be used as part of the transmission facilities. This would have the effect of reducing the pipe size required on the inner end of the line.

In the short term, Parkdale ratepayers would probably be faced with increased water costs; however, in the long term, economies would result for both systems. The integration of the Parkdale and Charlottetown water systems is, in fact, almost a textbook case illustrating the economies which can result from the rationalization of production and distribution. We therefore recommend integration of the two systems.

c) Airport Terminal and Approaches

The recent attempts to accommodate increased numbers of air travellers passing through the Charlottetown airport terminal has resulted in a facility which is comparable in size alone to other cities of the same population. Considering the future potential growth in air travel by residents, non-residents, and tourists during the peak seasons and in the shoulder months, the Charlottetown airport terminal facility does not offer the travelling public the amenities they normally expect.

On the basis of our projections of tourists travelling to the Island, we recommend that the committee responsible for implementing the tourist role of the opportunities study bring pressure to bear on the Ministry of Transport to provide a new terminal incorporating a restaurant/bar, adequate baggage handling carousels and, perhaps, limited shopping facilities.

Priority should also be given by the Charlottetown area to widening and upgrading the Brackley Point Road approaches to the airport. The first impression made to the air traveller arriving in Charlottetown is not up to the standard offered by other cities in the Atlantic Provinces. This road should therefore be improved to handle the air travelling public and to enhance the initial image to the first-time visitor.

III

OUR EXPECTATIONS FOR THE CHARLOTTETOWN AREA IN THE FUTURE

The historic progression of economic advancement in the Atlantic provinces has been spotty during the past century. In the immediate post-Confederation decade, technology smiled on the Maritimes. Their location, the availability of timber, and the predominance of ocean transport combined to maintain a relatively high level of economic achievement. But with the depletion of timber resources, the advent of steel and steam in transportation, and the declining economic importance of fishing, the relative economic position of the Maritimes began to decline. This decline continued for more than half a century.

Prince Edward Island faced two special problems, which accentuated the fact of Maritime decline on the province. It is an island, with obvious locational disadvantages for any manufacturing enterprise, and it is small. The importance of size to P. E. I. is obvious and was always a major consideration. In 1873, the economic viability of the Island forced the colonial government to accept confederation with the Dominion of Canada. Size is of even greater importance today, when capital-intensive manufacturing and large local markets govern economic viability and relative wage levels. Long after confederation, P. E. I. was characterized by economic stagnation and a standard of living much lower than the Canadian average.

During the past decade, however, the province has entered into a stage of rapid economic development. This has been prompted by: rapid increases in public investment, a new style of public stewardship through a co-ordinated comprehensive economic development plan, and the emergence of new investment opportunities in the private sector. It is in this context of renewed economic vigour that the Charlottetown Area Opportunities Study has been carried out.

A large portion of the research which is shown in Volumes II and III is devoted to various types of forecasts. We do not believe that economic planners should place overwhelming emphasis on forecasts; total belief in numbers which represent nothing more than the past "extended" into the future, might well lock the future into the past. However, for the Opportunities Study, the forecasts are important. They assist us in distinguishing between opportunities and selecting strategic sectors for major emphasis in public programs.

The following section of this chapter describes the economic vital statistics for the Charlottetown area. In it, we assess the growth of population, labour force, employment by sector and personal income in the Charlottetown area. These are fundamental economic variables. They will determine the future of the area's non-basic economic sectors.

Next, we discuss the future of the Charlottetown area in each of the four roles; a service centre, tourist centre, conference/seminar centre, and a light manufacturing centre.

Finally, in this chapter we present a frank, candid commentary on priorities for public investment. These are based on our analysis of the nature of economic opportunities for the Charlottetown area

A. ECONOMIC VITAL STATISTICS

1. Population Growth

The population of Prince Edward Island grew from 95,000 in 1941 to 111,600 in 1971. This is an average annual growth of 0.54 per cent for the period. We have estimated that the provincial population in 1986 will be 116,200.

The population of the Charlottetown area has grown from 17,400 in 1941 to 25,800 in 1971. This is an average annual growth of 1.32 per cent. Thus, the study area population has grown more than twice as fast as that of the province. As a result, the study area includes an increasing proportion of the provincial population. In 1971 it was 23.1 per cent of the total, up from 18.3 per cent in 1941.

We expect the population of the Charlottetown study area to grow from 26,200 in 1971 to 34,200 in 1985. This is an average annual growth rate of 1.93 per cent over the period, much faster than the 0.27 per cent average annual growth anticipated for the province as a whole. It is also faster than the historical rate of population growth of the Charlottetown area--1.32 per cent.

The development opportunities study deals with the periods 1972-1975, 1975-1980, and 1980-1985. Using the estimates given above, the population of the Charlottetown area for these periods is as follows.

<u>Year</u>	<u>Population</u> (<u>'000</u>)	<u>Population Increase</u>	
		<u>Total</u>	<u>Per Year</u>
1972	26.7		
1975	28.2	1,500	500
1980	31.2	3,000	600
1985	34.2	3,000	600

2. Labour Force

The provincial labour force grew from 34,000 in 1961 to 40,000 in 1972. This represents an average annual increase of 1.5 per cent. The labour force of the Charlottetown area grew from 6,400 in 1951 to 9,500 in 1972, an average annual rate of growth of 1.9 per cent. Currently, the labour force participation rate is 51.2 per cent. Male labour force participation rates have been declining due to the increasing popularity of higher education and the trend toward earlier retirement. However, female participation rates have been rising more rapidly because fewer married women are content to remain housewives. The result has been a gradual increase in the overall participation rate. These are national trends also, and we expect that they will continue through 1985.

We are keenly aware that the Charlottetown area experiences relatively high rates of unemployment. There is also evidence that a significant portion of the employment is of a seasonal nature. Realization of the development opportunities available may help to reduce the rate of unemployment. And to the extent that the development opportunities provide year-round employment, the seriousness of the seasonality problem will also be reduced.

We studied the trends in labour force participation rates and in the age structure of the population. From this we concluded that participation rates would continue to rise at least until 1985. The 1985 participation rate for the Charlottetown area was estimated at 39.0 per cent.

Given the projected population of the Charlottetown area in 1985 of 34,200, the participation rate provides a resident labour force of about 13,300. This implies that the area's labour force will grow at an average annual rate of 2.6 per cent until 1985. This is only slightly faster than the rate achieved during the past decade. It is the result of the relatively high rate of population growth projected combined with the increase in the participation rate.

Table 1 gives the sectoral composition of the labour force. It includes historical data for 1951 and 1961, estimates for 1972 and projections for 1985.

The labour force in all sectors, except the primary industries, has been increasing in absolute terms. The primary industries include agriculture, forestry, fishing, and mining. It is very common for the number of persons employed in these sectors to decline as the remaining farmland within the Charlottetown area is converted to urban use. We expect that there will be a further decline in the number of persons in this sector of the labour force.

TABLE 1

SECTORAL COMPOSITION OF THE LABOUR FORCE
OF THE GREATER CHARLOTTETOWN URBAN AREA
1951 - 1985

Sector	1951		1961		1972		1985	
	No.	%	No.	%	No.	%	No.	%
Primary Industries	121	1.9	63	0.9	50	0.5	30	0.2
Manufacturing	758	11.9	877	11.8	1,080	11.4	1,400	10.5
Construction	526	8.3	609	8.2	740	7.8	950	7.1
Transportation	808	12.7	818	11.0	890	9.4	1,050	7.9
Retail Trade	1,064	16.7	1,424	19.2	1,950	20.5	3,050	22.9
Wholesale Trade	386	6.0	445	6.0	330	3.5	350	2.6
Finance, Insurance, and Real Estate	230	3.6	253	3.4	360	3.8	500	3.8
Community, Business, and Personal Services	1,757	28.0	2,121	28.5	2,540	26.7	3,800	28.6
Public Administration	584	9.2	673	9.0	1,400	14.7	1,900	14.3
Not Stated	109	1.7	147	2.0	160	1.7	270	2.0
TOTAL	6,873	100.0	7,480	100.0	9,500	100.0	13,300	100.0

Source: Dominion Bureau of Statistics, Census of Canada 1951 and 1961.
Stevenson & Kellogg, Ltd. estimates and projections.

Construction, transportation and, more recently, wholesale trade, have suffered relative declines in their share of the labour force. These declines are at least partly due to technological changes in those sectors. The construction industry is making greater use of synthetic materials and prefabricated components. Capacities of most transportation vehicles--railway cars and truck trailers--are increasing, and handling requirements are being reduced by containerization. The situation in the wholesale trade sector is more complex. The increasing size and chain organization of retail outlets is reducing the need for local wholesalers. At the same time, warehouse mechanization and improved transportation scheduling favour fewer and larger warehouses. We anticipate that these relative declines will continue.

Manufacturing and finance, insurance and real estate, have approximately maintained their shares of the labour force. We project that this will continue to be the case for the latter sector. Unfortunately, we do not expect that the Charlottetown area will be able to generate additional manufacturing employment at a rate of 2.6 per cent per year. Thus, its share of the labour force is forecast to decline. The decline is from 11.4 per cent of the labour force in 1972 to 10.5 per cent in 1985. This still requires an average annual increase in manufacturing employment of 2.0 per cent--a slightly higher rate than has been achieved in the past.

The largest sectors of the labour force in the Charlottetown area are community, business, and personal services, retail trade, and public administration. These sectors have also increased their shares of the area's labour force. Essentially, we expect these trends to continue.

3. Personal Income

Personal income data are not published for sub-provincial areas. Thus, we must deal with personal income for the province as a whole. As a general rule, however, personal income per capita tends to be higher in urban areas than rural areas. This is probably true of Prince Edward Island as well.

Personal income per capita increased from \$653 in 1951 to \$971 in 1961 and to \$2,188 in 1971. The average annual increase during the latter decade was 8.5 per cent. The personal income per person in Prince Edward Island has increased from 54.5 per cent of the Canadian average in 1951 to 64.3 per cent in 1971.

Personal disposable income is equal to personal income less personal taxes. Thus, it might be expected to display similar patterns to that of personal income. This is indeed true. Personal disposable income per capita grew from \$622 in 1951 to \$914 in 1961, and to \$1,920 in 1971. The average annual increase during the latter decade was 7.7 per cent. Personal disposable income per person in the province increased from 56.5 per cent of the Canadian figure in 1951 to 69.7 per cent in 1971.

The growth in personal income per capita in Prince Edward Island over the past decade has been rapid and sustained except for the recessionary periods at the beginning and end of the period. Our forecast shows that the personal income per capita would be \$6,200 in 1985 if the trend of the past decade were maintained. The personal income figures are in current dollars, so a trend projection implicitly assumes that inflation will continue at the same rate as during the sixties. The average annual rate of inflation from 1961 to 1971, as measured by the GNP implicit price deflator, was 3.3 per cent.

We expect that the rate of inflation in the future will be higher. Specifically, we estimate that the average annual increase in the implicit price deflator to 1985 will be 4.0 per cent. We also expect that the impact of the development plan will be to maintain the rate of growth of real personal income achieved during the sixties. This rate of growth was higher than the Canadian average. Thus, we must adjust the trend projection of personal income for the higher rate of inflation.

The adjusted projected personal income per capita in 1985 becomes \$7,450. This is an average annual increase of 9.1 per cent. The personal disposable income in 1985 is estimated at \$6,300, giving an average annual increase of 8.9 per cent.

4. What This Means For Charlottetown

Our brief summary of the Charlottetown area's economic vital statistics suggests a particular type of future for the city. The forecasts show:

- ▶ an increased rate of population growth for the study area;
- ▶ a rapidly increasing labour force;
- ▶ a large increase in personal income; and
- ▶ a shift of labour force from "hard" service and manufacturing sectors into softer, service related areas.

Other evidence, not described in our report, also supports the view of the Charlottetown area as a service centre. For example, agricultural productivity continues to increase in P. E. I., parallel with an obvious upward trend in international food prices. As more profits accrue to the province's agricultural sector, the demand for the area's capacity as a service centre will continue to increase.

Volume III of our study describes challenging opportunities for the Charlottetown area as a tourist centre. Although this is a basic economic sector, it will also amplify the demand for service centre activities, such as restaurants, hotels, and other forms of personal services. Fortunately, the Charlottetown area's roles as a service and tourist centre do not compete with each other; they are complementary and mutually supportive.

The economic vital statistics on the Charlottetown area are background information to the detailed analysis of opportunities. Next, we examine more thoroughly in a separate section of this report, the Charlottetown area in each of its four roles

B. THE SERVICE CENTRE ROLE

Our assessment of the Charlottetown area's economic future leads us to the conclusion that it will most successfully play its role of a regional service centre. These conclusions are derived from the area's economic vital statistics which show increases in population and personal income. Moreover, anticipated increases in tourist spending will reinforce this role.

The principal elements of the service centre role are: retail trade and community, business and personal services. A closer look at these two components will illustrate the importance of service industries to the future of the Charlottetown area.

1. Retail Trade

Retail outlets in the Charlottetown area employ--including owners and members of their families--some 2,000 persons. This makes it the second largest sector in the area's economy. The importance of this sector to the Charlottetown area economy, then, is obvious, and further illustrated by data on retail sales for the area.

<u>Year</u>	<u>Retail Sales In Charlottetown</u> <u>\$'000</u>
1967	35,890
1968	37,877
1969	38,465
1970	41,376
1971	45,993
1972	49,863

Their rate of increase at about 6.8 per cent per annum is slightly faster than the provincial growth rate of 5.8 per cent. Charlottetown now accounts for about 34.0 per cent of the province's total retail sales.

Apparently, the Charlottetown area has a large amount of retail space relative to its population. Similar communities typically have a total of 20 - 25 square feet of retail space per capita, whilst the Charlottetown area has about 35. This suggests that a large percentage of retail sales are to non-residents.

We see a major opportunity for expansion of the retail trade sector. The basic component of this sector has been growing. We feel this can continue and, indeed, grow faster.

We project potential growth in the Charlottetown area retail sales at an average annual rate of 9.5 per cent, to reach the \$160 million level by 1985. This is substantially faster than the 7.8 per cent rate achieved over the past five years, but can reasonably be expected because of anticipated increases in personal income, population, and tourist spending.

This retail sales potential will only be achieved under certain conditions. First, most of the expansion of retail space should occur within the downtown area--retail sales are maximized when the opportunity to promote impulse buying is maximized. This occurs where the widest varieties of goods are available--the downtown area.

The first condition has a number of implications. New suburban shopping centres should be discouraged. Existing shopping centres should not be allowed to expand. Expansion of retail space in the downtown area should occur within a relatively small area. The preferred area is outlined in the development plan.

The second condition is that as many tourists as possible should be induced to visit the downtown retail area. This can be achieved by locating tourist facilities--accommodation and restaurants--nearby. Such downtown locations can be made attractive to tourists by providing them with suggested daily trips to beaches and other points of interest, and by providing a wide range of evening entertainment.

2. Community, Business and Personal Services

In terms of labour force employed in the Charlottetown area, this is the largest sector. One reason for this is that it includes tourist facilities--hotels, motels, restaurants.

About 2,540 residents of the Charlottetown area--over 25 per cent of the labour force--is engaged in providing such services. An estimated 815 of these persons are engaged in tourist related activities. The remaining 1,725 provide a variety of services to the local and regional population. These services are provided by over 300 relatively small establishments. Some, such as educational institutions, hospitals, and nursing homes, have large staff, but most have fewer than 5 employees.

The analysis of the tourist centre role suggests a growth in direct employment for the Charlottetown area from the current 815 to 1,275 in 1985, an average rate of about 3.5 per cent.

The remainder of the sector will grow at a slower rate-- about 3.0 per cent per year, higher than the rate achieved in the past. There are two principal reasons for projecting the higher rate. The population of the area is expected to grow significantly faster. And the steady growth in personal income will lead to a higher percentage being spent on services.

C. THE TOURIST CENTRE ROLE

The tourism sector is currently the Charlottetown area's most important basic activity. In Table 2 we highlight its importance to the Charlottetown area, as reflected in tourist expenditures. The total 1971 spending on the Island for all categories of tourist expenditure was \$15.6 million. Our analysis of taxation data reveals that an estimated \$8.6 million, or 55.1 per cent, of all Island tourist spending is in the Charlottetown area.

A further indicator of the importance of tourism in the Charlottetown area economy is shown in Table 3. This shows the estimated employment generated in the area as a result of tourist spending in 1971. Of the Charlottetown area labour force, about 11.1 per cent is employed directly through tourist spending.

In 1970, the "Encounter on Urban Environment" was held in Halifax. The tourist sector was reviewed and discussed. In their report on the tourism sector, there were two significant statements concerning the economic impact of tourism. These statements are equally as pertinent to tourism in the Charlottetown area as they are to Halifax. These were:

- ▶ "Tourism can be an asset which provides jobs, adds to the tax base of a community, and is a drawing card which can attract new business, and increase the area's economic potential."
- ▶ "Successful tourism for a region will not come merely as an extension of past policies and practices, but from a broader, more comprehensive look at the basic aspects of tourism, and a more imaginative look at its potential."

TABLE 2

TOURIST EXPENDITURES IN CHARLOTTETOWN - 1971

Categories of Spending	P. E. I. % of Total Expenditure	P. E. I. Expenditure by Category (\$'000)	Charlottetown ¹ Area As A Percent of Total	Expenditure In the Charlotte- town area (\$'000)
Accommodation	24	3,744	53.0	1,984
Gas, oil and repairs	15	2,340	43.9	1,027
Food and beverage	11	1,716	44.2	758
Restaurants	23	3,588	58.5	2,099
Handcrafts	9	1,404	65.0	2,738
Entertainment	8	1,248		
Other	10	1,560		
	100	15,600		8,606 (55.1%)

¹The Charlottetown proportion was computed from data provided by the Taxation Branch of the Provincial Department of Finance.

TABLE 3

EMPLOYMENT GENERATED IN THE CHARLOTTETOWN AREA
BY TOURIST SPENDING

1971

Categories	P. E. I. ¹	Charlottetown Proportion	Charlottetown Man-Weeks
Accommodations	31,605	53.0	16,750
Restaurants	32,459	58.5	18,989
Entertainment	9,554	65.0	6,210
Provincial Government	1,326	100.0	1,326
Other (consolidated)	18,718	50.0	9,359
TOTAL			52,634

The Charlottetown area labour force is approximately 9,000.

Approximately 11.1% of the labour force is employed as a result of tourist spending.

¹See Table 5, Vol. III for source.

The Charlottetown area can fulfill a major role as a tourist service centre as part of tourism on the Island. As a tourist service centre, it would provide support to the industry through offering diversified activities to tourists whose vacation is largely beach and resort oriented. The area presently plays this role. However, with the improvements in accommodations, restaurants and entertainment suggested in this Development Plan, the Charlottetown area can achieve a much larger potential as a tourist service centre.

Expansion of accommodation facilities in the Charlottetown area could contribute to a broader and more balanced economic development in Prince Edward Island. More accommodation facilities would tend to minimize the major constraint to tourists' demand during the peak summer season. It would also have the effect of lengthening the average tourist's stay and increasing his daily expenditure. Moreover, the availability of higher class accommodation in the Charlottetown area would attract more conferences and conventions, thus increasing the number of visitors who are classed among the "big spenders".

New accommodation facilities would also have a short term effect on construction, wholesale, furniture manufacture, and handcraft industries. Hotels may be inclined to install replica pine antique furniture, and use locally handcrafted items such as bedspreads, ashtrays, etc.

The economic value of the restaurant sector to balanced economic growth in the Charlottetown area would be enhanced through the provision of higher class restaurant facilities. It could also result in increased consumption of locally produced agricultural products. Spending in the restaurant sector has a higher multiplier effect, and as most restaurants are locally owned, would therefore have a greater impact on incomes in the Charlottetown area.

D. THE CONFERENCE/SEMINAR ROLE

The Charlottetown area's role as a conference/seminar centre is an extension of its role as a tourist attraction. Conference goers are simply tourists with a specific purpose--one often legitimized as a tax deductible expense.

Nevertheless, in this study the conference centre role is separated from tourism. There are a number of valid reasons for this distinction.

- ▶ Strategies for promoting conferences are quite different from those used in the promotion of tourism.
- ▶ Conventioneers have different spending habits from typical tourists.
- ▶ Success as a convention centre would gain for the Charlottetown area, a national or even international prominence.
- ▶ Conferences are normally held at times other than peak tourist seasons, providing a healthier balance in the use of facilities.

The inter-city competition for conventions in North America is keen. Yet, just as international conferences make it their policy to rotate their meeting places in Canada, so do Atlantic regional meetings change their conference site. We would expect the Charlottetown area to receive its share of this market.

Our data show that the Charlottetown area does receive a proportionally large share of the convention market. This is shown in Table 4, which compares Halifax, St. John's, and Charlottetown with respect to conventions--1970, 1971 and 1972.

The Charlottetown area's success in competing with other regional centres may be limited in the future by factors such as its lack of variety in attractions, cuisine and accommodations. Moreover, it is neither as readily accessible by air nor does it contain a large convention hotel to offer a comprehensive set of services under one roof.

Our analysis of the Charlottetown area conventions from 1967 to 1972 reveals the disturbing fact that less than 5.0 per cent is repeat business. This statistic suggests that the Charlottetown area as a meeting place is unable to compete for conferences requiring a large hotel. With the exception of relatively small groups, the Charlottetown area is not presently in a strong competitive position.

TABLE 4

A COMPARATIVE ANALYSIS OF CONVENTIONS
HELD IN THREE ATLANTIC PROVINCE CENTRES

Year	Location	No. Of Conventions	Delegates		Hotel Rooms ¹	
			Number	% Of Market	Number	% Of Total
1970	Charlottetown	44	4,714	19.59		
	Halifax	41	13,940	57.91		
	St. John's	22	5,417	22.50		
	Total	107	24,071	100.00		
1971	Charlottetown	37	5,659	17.54		
	Halifax	75	18,290	56.70		
	St. John's	31	8,309	25.76		
	Total	143	32,258	100.00		
1972	Charlottetown	23	5,185	22.11		
	Halifax	70	13,800	58.86		
	St. John's	34	4,461	19.03		
	Total	127	23,446	100.00		
	Charlottetown				559	30.65
	Halifax				848	46.49
St. John's				417	22.86	
Total				1,824	100.00	

¹Includes only rooms located in hotels with convention facilities.

Table 5 shows another disturbing theme in the Charlottetown area convention business. An increasing proportion of conventions held in the Charlottetown area occur during the peak months of June and July. This places a serious strain on facilities, already stretched to capacity, especially during the month of July. This could have an inimical effect on the future of both the convention and tourism industries in the Charlottetown area.

The importance of conventions to the economy of the Charlottetown area must be placed in the proper perspective. In 1971, only 5,659 conventioners attended meetings in the Charlottetown area. This had a minor economic impact compared to the 600,000 tourists who visited the Island that year. Even if the Charlottetown area matched Halifax and tripled its success, the total number of delegates is miniscule relative to the total number of tourists.

We do not see the Charlottetown area developing a high volume of meeting activity, but we do feel that it is capable of achieving larger participation in the market than it presently enjoys. Fortunately, recommendations regarding facilities required for an expansion of the convention sector can be almost entirely justified by the needs of the tourism sector. The fact that tourism and conventions are mutually supportive adds strength to the role which each sector plays in the Charlottetown area's future.

E. THE LIGHT MANUFACTURING ROLE

The current labour force in the manufacturing sector totals 1,154. More than half of the total is employed in the food and beverage manufacturing sector. The next three largest employers are in building supplies, printing, publishing and allied trades, and metal fabrication, hardware, etc.

The manufacturing sector forecast is about 1,400. This is an increase of 523 over 1961, and 320 over 1972. Our projections suggest that the four largest sectors of the manufacturing labour force will employ:

TABLE 5

SUMMARY OF CONVENTIONS HELD IN THE
CHARLOTTETOWN AREA 1967 - 1973

Year	REGISTRANTS		Maximum Size	Name	
	Total	June and July			
		No.	%		
1967	1,230	230	18.70	300	Superintendents of Insurance
1968	3,190	1,190	37.30	600	Grand Chapter Eastern Star
1969	3,940	1,030	26.14	315	Junior Chamber of Commerce
1970	4,714	1,005	21.30	400	Canada Permanent Mortgage
1971	5,659	1,120	19.80	1,000	Canadian Music Educators
1972	5,185	2,045	39.40	1,000	Agriculture Institute of Canada
1973	9,515 ¹	3,225	33.90	900	Cdn. Fed. Of Mayors and Municipalities
Averages	4,776	1,406	29.43		

¹ Estimate only--complete statistics not available.

Foods and Beverages	179
Building Supplies	55
Printing, Publishing and Allied Trades	35
Metal Fabrication and Hardware	32

We suggest that the projected growth in the manufacturing sector would best be met by expansion of existing firms.

We identified five possible opportunities for the manufacturing sector in the Charlottetown area. Some of these ideas are already being implemented or have just started production. Others will require test marketing, and others will require further study and analysis. The five opportunities that appear to exist and result from our study are:

- ▶ trusses - residential, agricultural;
- ▶ interior and exterior panels for residential construction;
- ▶ P. E. I. replica pine furniture;
- ▶ skim milk powder;
- ▶ handcrafts.

Based on our analysis of future employment in the manufacturing sector and our experience, we see manufacturers of foods and beverages, and metal fabricating firms, as logical candidates for location in industrial park land. We would expect that about 80 per cent of new jobs created in these two sectors would locate in an industrial park. We therefore estimate that about 13 acres, in addition to the Parkdale Industrial Park, would be required between now and 1985. We therefore recommend that steps be taken in 1975 to take options on land in the area designated by our planners, to create a new industrial park. This should be a quality park and have initially 10 acres of serviced land, out of a total of a minimum of 100 acres.

To identify opportunities in the light manufacturing sector, we made enquiries in virtually every feasible area. After preliminary screening, we established fifty-two potential categories of light manufacturing enterprise for the Charlottetown area. Each of these was treated separately, and some form of feasibility analysis was performed. Only five categories of activities in light manufacturing passed the test. This is not to say that more of the other light manufacturing activities could not succeed in P. E. I., under any circumstances! Given the right combination of subsidy, circumstance and inspired entrepreneurship, any type of enterprise could be supported.

A number of agencies and individuals are engaged in promoting the growth of light manufacturing activity in P. E. I. Most are doing an excellent job, given the economic environment. The disadvantage of location and size for the Island cannot be easily overcome.

Our philosophy of economic planning leads us to advocate the immediate exploitation of immediate and apparent economic opportunities. Although we feel that the search for opportunities in light manufacturing should continue, and receive public support, we feel that the more immediate and apparent economic opportunities be in the service and tourism sectors. These should receive priority in the Charlottetown area development plan.

F. THE GROWTH SECTORS: A NEED FOR PUBLIC PRIORITIES

We have assumed a particular posture in assessing the economic opportunities for the Charlottetown area. Our recommendations reinforce this view, and are determined by our belief that economic planning should focus on the most profitable, viable alternatives. The growth sectors have been defined as:

- ▶ Service industries, especially those in the retail and community, business and personal areas.
- ▶ Tourism, and to the extent that it reinforces this major thrust, the conference/seminar sector.
- ▶ Selected opportunities in the light manufacturing sector.

Agreement with our priorities, and their incorporation in economic planning policies, would determine a particular kind of future for the Charlottetown area. From this perspective we can sketch the major dimensions of the Charlottetown area in 1985:

- ▶ The population will be about 35,000, up from 25,800 in 1971.
- ▶ The labour force will increase to about 13,300, up by 3,800 over current levels. Since major growth will occur in the retail trade, and in the community, business and personal services, a small business area, growth here will have a major impact on the visual and physical structure of the Charlottetown area.
- ▶ A number of light manufacturing opportunities will have been exploited. Most will be contained in industrial parks, reflecting a need to preserve the environment and locate industry accordingly.
- ▶ The Parkdale Industrial Park will be full, and part of a new industrial park located near the airport will be occupied.
- ▶ Island tourist visitors will increase to 1.3 million by 1985. About 1.0 million will visit the Charlottetown area.
- ▶ Direct employment related to tourist spending will be 1,275, as compared to 815 in 1971.
- ▶ Tourist annual spending in Charlottetown will be about \$30 million as compared to \$8.6 million in 1971.
- ▶ A new hotel-conference complex will be located in the heart of Charlottetown.
- ▶ The Charlottetown area will become an established conference centre, catering to the medium size, 400-500 attendance meetings.

Our recommendations support these descriptors of the Charlottetown area in 1985. Given the availability of opportunities, we feel that such a future is viable and can be attained in the next twelve years. But two major sets of decisions must be made before Charlottetown can follow the path which we have outlined. These relate to two basic questions:

- ▶ Do Charlottetowners wish to seek the future which we have described, one which has been dictated by the economic realities of their location and position? Other alternatives are possible, but they must be forged through public examination and soul searching.
- ▶ If the Charlottetown area's populace accept our development plan outline of their future, what mix of public and private ventures will best satisfy its attainment? This is a complex question, relating to both the efficiency of plan implementation and the indirect philosophic question of public profile in the market place.

We can say no more about the first question. The answer will emerge from public and private responses to this Development Plan. But the second question deserves further review.

The public sector has an awesome responsibility for the social and economic welfare of its constituents. This is a responsibility which tends to be clarified during periods of adverse economic conditions. Yet crisis management dictates crisis responses to immediate problems and should not be the environment in which public authorities define their total responsibility for economic welfare. We are engaged in designing a Development Plan; one which will affect the future of the Charlottetown area for some time to come. In that context, how are public responsibilities for economic management outlined?

The most simple definition of planning is: to develop strategies for achieving a future end by optimal means. Since economic development plans originate in the public sector, authorities at this level must make three qualifying assumptions:

- ▶ Changes in public policy can influence the economic and social environment.
- ▶ The objective(s) of public policy can be defined in a meaningful way. This assumes that social "trade-offs", between different beneficiaries of public policy, different time horizons and anticipated benefits, and different dimensions of policy (economic versus political goals) can be specified.
- ▶ Optimization rules for the attainment of goals and objectives of public policy can be established.

These three assumptions suggest that the public agency responsible for planning seeks to influence a complex environment. If the agency is acting from some definition of "social needs", then it must consider the responses of the private sector of the economy. Clear delineation of public initiative and private responses, as well as the distinction between public and private economic responsibilities in society, is an important component of any economic plan.

Notwithstanding the specific provisions of a plan, the decision to create a plan in the public sector is a strategy having an influence on the private sector. The plan indicates a serious interest by public authorities in a particular economic area or sector. This interest may bring a greater degree of stability and certainty to that particular area or sector. Alternatively, the interest may lead to public subsidies of private entrepreneurs. At the very least, the plan will generate information, useful to private entrepreneurs.

In addition to this general, implicit influence of economic planning, we can identify two sets of public strategies, defined according to the degree of public involvement in the private market. These are:

- ▶ Strategies in which the government plays a direct role and influence on the private market. For example, it may invest in activities which compete directly with private entrepreneurs. The National Park camp grounds in Prince Edward Island are an example of this type of activity. Another form of direct government influence on the private sector occurs when the government acts in a promotional capacity by advertising on behalf of private entrepreneurs. The Department of Environment and Tourism in Prince Edward Island has a large budget for this activity. It is justified on cost/benefit criteria. The additional tax revenues from tourism are expected to exceed the promotion costs to government.

- ▶ Another category of strategies involves indirect support of the private sector through public resources. Although these influences may have a powerful effect on the private sector, they are indirect in that government resources do not directly fund activities within the private sector. The creation and maintenance of infrastructure such as roads, communications, and environmental improvements, are strategies which improve opportunities within an industry without direct interference with its operation. Another example is given by various government efforts to promote private investment in the industry. This can take the form of relaxed regulations for operators in the industry, or changes in the tax structure which enhance the private rate of return.

Distinguishing between direct and indirect government strategies in economic development is difficult. Yet it is an important exercise. We must be able to clearly define the roles of the private and public sectors.

Our development plan contains implicit and fundamental assumptions about the roles of the private and public sectors in the future development of the Charlottetown area. These are:

- ▶ Government should not displace private capital which is earning profitable rates of return.

- ▶ Since any government expenditure involves a transfer of resources from one constituency to another, all government programs should be carefully scrutinized to assess their social rate of return. This, of course, parallels our use of the "feasibility study concept" in the development plan.

- ▶ Government should be playing an active indirect role in the market. For the Charlottetown area development plan, we propose a major government role in the provision of infrastructure.

PHYSICAL PRESENCE FOR THE CHARLOTTETOWN AREA

Our terms of reference required us to devote a large portion of our research to the physical aspects of the Charlottetown area. In retrospect, the original emphasis was well placed. Our analysis of economic opportunities for the Charlottetown area leads us to conclude that physical planning is the most important dimension of the Economic Development Plan. This conclusion is supported by a number of considerations.

- ▶ Tourism, including convention/seminar activities, is expected to play an important role in the Charlottetown area's future. In order to make full use of the potential in this sector, and maximize the provincial returns from tourism, Charlottetown must undergo refurbishment and physical revitalization.
- ▶ The service sector is expected to grow dramatically during the next decade. This will create a large demand for retail space in the area. The distribution of this new space requirement will affect the shape of the future Charlottetown area. Control over this distribution should be recognized by public authorities as an instrument for both furthering the goals of the plan, and improving the presence of the Charlottetown area.
- ▶ Many of the opportunities identified will spawn the growth of small businesses. Since market incentives are an important determinant of small business location, government promotions and subsidies can easily redirect them into geographic areas which support the goals of the plan. We wish to avoid the situation which exists today, where small businesses are almost evenly distributed in a variety of structures throughout the Charlottetown area.

- ▶ Charlottetowners need to have greater pride of place. This will contribute directly to local self-esteem and indirectly to entrepreneurship in the area. Moreover, it may help stem the tide of out-migration by the area's youth.

To design a physical presence for Charlottetown, we must first consider its natural features. These are the base on which all plans must be framed. From the analysis of natural features, we identify a "fundamental feature" on which future growth should be focused. Finally, we develop an implementation scheme which makes best use of the "fundamental feature". All of these considerations are treated in the remaining sections of this chapter.

A. THE NATURAL FEATURES

The Charlottetown area is a physical reality. It has a history, a location, and an existing economic and social infrastructure. The positive aspects of its existence are:

- ▶ the largest concentration of population on the Island;
- ▶ the seat of provincial government;
- ▶ the provincial centre for higher education;
- ▶ the retail and wholesale centre for the province;
- ▶ the largest concentration of personal services in medical and mental health areas;
- ▶ located near the geographic centre of the province-- and in particular to the major Island tourist areas;
- ▶ contains the greatest concentration of entertainment and accommodation facilities for tourists and conference attendees;
- ▶ contains a larger percentage of historically and architecturally significant structures than any other city in Canada;

- ▶ has a generally unused but potentially exploitable harbour;
- ▶ relatively pollution free as compared with larger urban centres.

The Charlottetown area attributes are usually associated with its size, location, and historic development, particularly in the central area. It is also an urban area that has neither been exposed to extreme pressure nor the impact of pollution that we associate with larger urban centres in Canada.

It is well situated in relation to the Island as a whole and particularly to the tourist areas, and its location affords easy access to the countryside.

The concentration of its principal functions in the central business district in a relatively small area, lends itself to development patterns that are pedestrian oriented. The central area contains many historically and architecturally significant buildings and residences. In general, buildings are in a good state of structural repair, and provide the potential to exploit the old world charm not found in such concentration in many Canadian urban centres.

We have classified all buildings and structures in Charlottetown with respect to land use. This analysis, shown on Figure 3, indicates that there are a large number of structures in the core area of Charlottetown which have a great deal of potential for any revitalization scheme.

The central area may suffer from the recent trend toward decentralization of some urban functions. The continued growth of suburban shopping centres, the location of the University outside of the central area, could detract from the viability of the central area as the focal core of the area's functions.

Unfortunately, like all cities in the twentieth century, the impact of the automobile, generating requirements for parking, and the ever increasing traffic congestion with growth in numbers, accentuated in the tourist season, tends to detract from the quality and attractiveness of the central area.

B. DIRECTIONS FOR PUBLIC POLICY

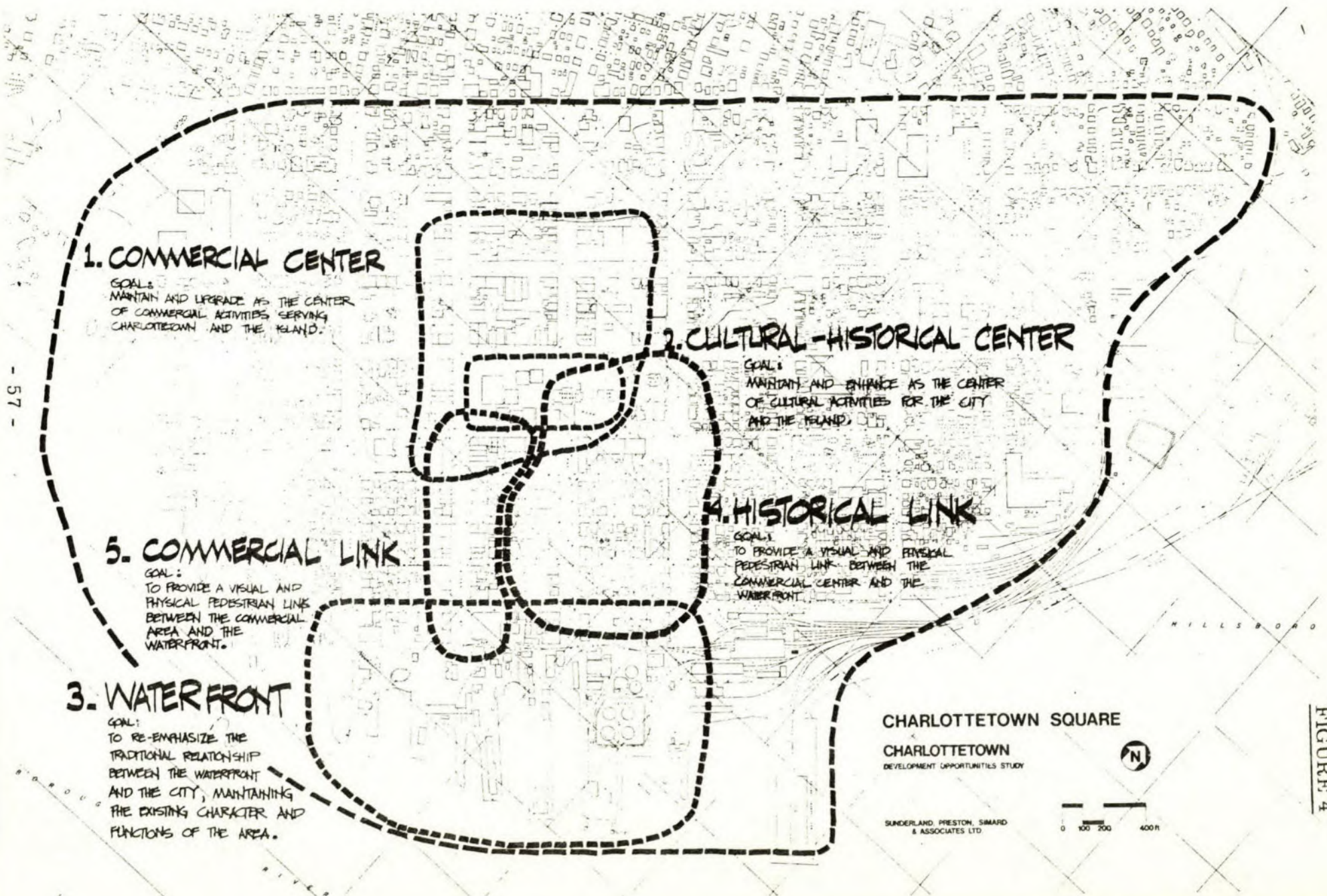
Our development strategy philosophy for the Charlottetown area is a conservative one. We see nothing to be gained in Charlottetown emulating the larger urban centres in Canada. Of major importance is the role of the Charlottetown area as a place where people like to live, work, and play. This reflects the Island way of life. The Charlottetown area offers many unique advantages to its residents that are peculiar to a city of its size and location.

We see the Charlottetown area's role as mainly a tourist and service centre. We do not see the area becoming a highly industrialized area. The industrial growth that does occur will probably take the form of small light manufacturing firms. These should locate in the industrial parks.

Charlottetown's physical attributes in the form of buildings and old residential houses of historic or architectural significance give it an enviable appearance of old-world charm. The Charlottetown of 1985, or before, could, through highlighting what now exists, achieve an improved image. It is a city that lends itself to becoming more attractive because of its size, and its endowment with characteristics which are becoming the envy of all major urban centres. Elsewhere, the old world character has been obliterated with concrete, aluminum, and glass.

Our physical development plan for the Charlottetown area is organized around a number of themes, based on the existing functional qualities of areas within the study area. There is a unity in the relationship between the themes--centred around a "Charlottetown Square" which has a strong historical/pedestrian bias. A schematic for the concept is shown in Figure 4.

Charlottetown of the future will start to become a reality with the upgrading process and the installation of the "Charlottetown Square" opportunities we have identified for the central area. We see the central area presenting a new face through the implementation of paintup/cleanup programs, using co-ordinated colour schemes.



1. COMMERCIAL CENTER

GOAL:
 MAINTAIN AND UPGRADE AS THE CENTER
 OF COMMERCIAL ACTIVITIES SERVING
 CHARLOTTETOWN AND THE ISLAND.

2. CULTURAL-HISTORICAL CENTER

GOAL:
 MAINTAIN AND ENHANCE AS THE CENTER
 OF CULTURAL ACTIVITIES FOR THE CITY
 AND THE ISLAND.

4. HISTORICAL LINK

GOAL:
 TO PROVIDE A VISUAL AND PHYSICAL
 PEDESTRIAN LINK BETWEEN THE
 COMMERCIAL CENTER AND THE
 WATERFRONT.

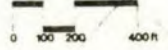
5. COMMERCIAL LINK

GOAL:
 TO PROVIDE A VISUAL AND
 PHYSICAL PEDESTRIAN LINK
 BETWEEN THE COMMERCIAL
 AREA AND THE
 WATERFRONT.

3. WATERFRONT

GOAL:
 TO RE-EMPHASIZE THE
 TRADITIONAL RELATIONSHIP
 BETWEEN THE WATERFRONT
 AND THE CITY, MAINTAINING
 THE EXISTING CHARACTER AND
 FUNCTIONS OF THE AREA.

CHARLOTTETOWN SQUARE
 CHARLOTTETOWN
 DEVELOPMENT OPPORTUNITIES STUDY



SUNDERLAND, PRESTON, SIMARD
 & ASSOCIATES LTD.

FIGURE 4

The Confederation Plaza, enhanced with new greenery, could become a hive of activity, with people enjoying the outdoor cafe, whilst being entertained by live music. Pedestrian activities predominate. Pedestrians tour the historic and commercial links, and enjoy the historic walking tour, and all of the amenities of Charlottetown Square.

The linkage streets, Queen and Great George, are improved with new plantings, benches, and changes in parking patterns. New and interesting shops and boutiques to serve the pedestrian oriented clientele line the streets and the waterfront. Charlottetown's pedestrian walkway leads through the waterfront area, past the pine furniture shop, and to the tavern/restaurant on the waterfront pier. The fisherman's and farmer's market in the same area caters to tourists and residents alike. A marina has been built at the yacht club, and tour boats offer harbour trips during the summer months.

These new facilities have created two contrasting characters for the waterfront area. During the day the tempo is busy and the waterfront buzzes with the intermix of activities--both existing and new. In the evening, the mood is quiet, relaxed. Most activities would have stopped for the day; the lights of the tavern and the restaurant, the art gallery, the museum, and the hotel--the focal point of evening activity--meet with those of the lighted pedestrian system winding through the waterfront, creating an evening character soft in contrast to the day.

C. CHARLOTTETOWN SQUARE

The proposed Charlottetown Square concept is bounded on the North by Grafton Street, west by Queen Street, to the east by Great George Street, and to the south by the waterfront. Existing structures are proposed to be retained, restored, and modernized only to the extent of facilitating their use as tourist and conference attractions. The original charm of this historical site is to be molded into a human theme of old serving new, and the new engendering the tasteful use of available land space.

The heart of Charlottetown Square is the Confederation Centre, adjacent to the Province House, which retains the taste of Victorian architecture. The centre houses the theatre, museum, art gallery, and a library. The art gallery attracts exhibitions from Europe, but primarily hosts the work of Canadian artists, especially those from surrounding areas.

Great George Street serves as the historic link between the cultural centre and the waterfront. The street will have restricted vehicular traffic, with widened sidewalks, new plantings, benches, etc. to lead the Charlottetown visitors to the waterfront. The waterfront has been revitalized through the addition of new restaurants and shops, superimposed on existing activities in that area. The plan and sketches of the suggested changes are shown in Figures 5 - 12.

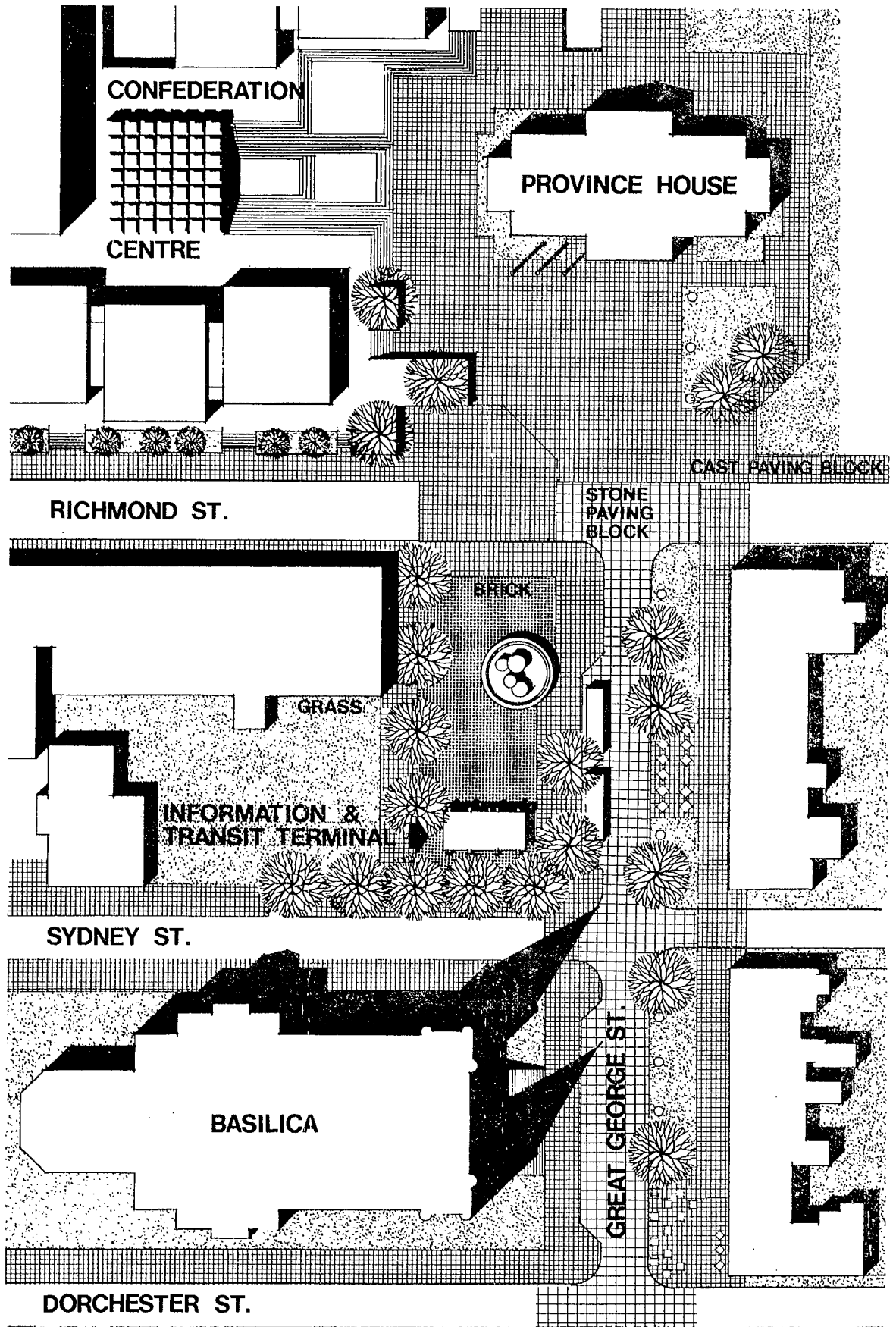
Queen Street is the commercial link leading from the waterfront to the Confederation Centre. Here, the buildings have been restored, and new shops and boutiques attract customers to the area. Figures 13 and 14 illustrate typical Charlottetown area buildings as they presently appear and the impact of restoration. The basic decisions involved in Charlottetown Square are not only the buildings themselves, but also the contemporary community of which they are a vital element.

In these days of unlimited growth, of changing social and economic patterns, we cannot hope to save every architectural fragment from the past. Yet, the main thrust of this proposed concept would vitally link an important segment of Canada's past with its growing future, and would create Charlottetown Square--another one of Canada's recreational centres.

The Charlottetown area must strive for an imaginative blending of the old and the new, the past and present, in order to add diversity and spice to the cityscape. So treated, historic restoration, preservation and reconstruction, are important elements in the city's urban design.

Any or all of these proposals and possibilities may be involved to save Charlottetown's architectural excellence, not architectural mediocrity.

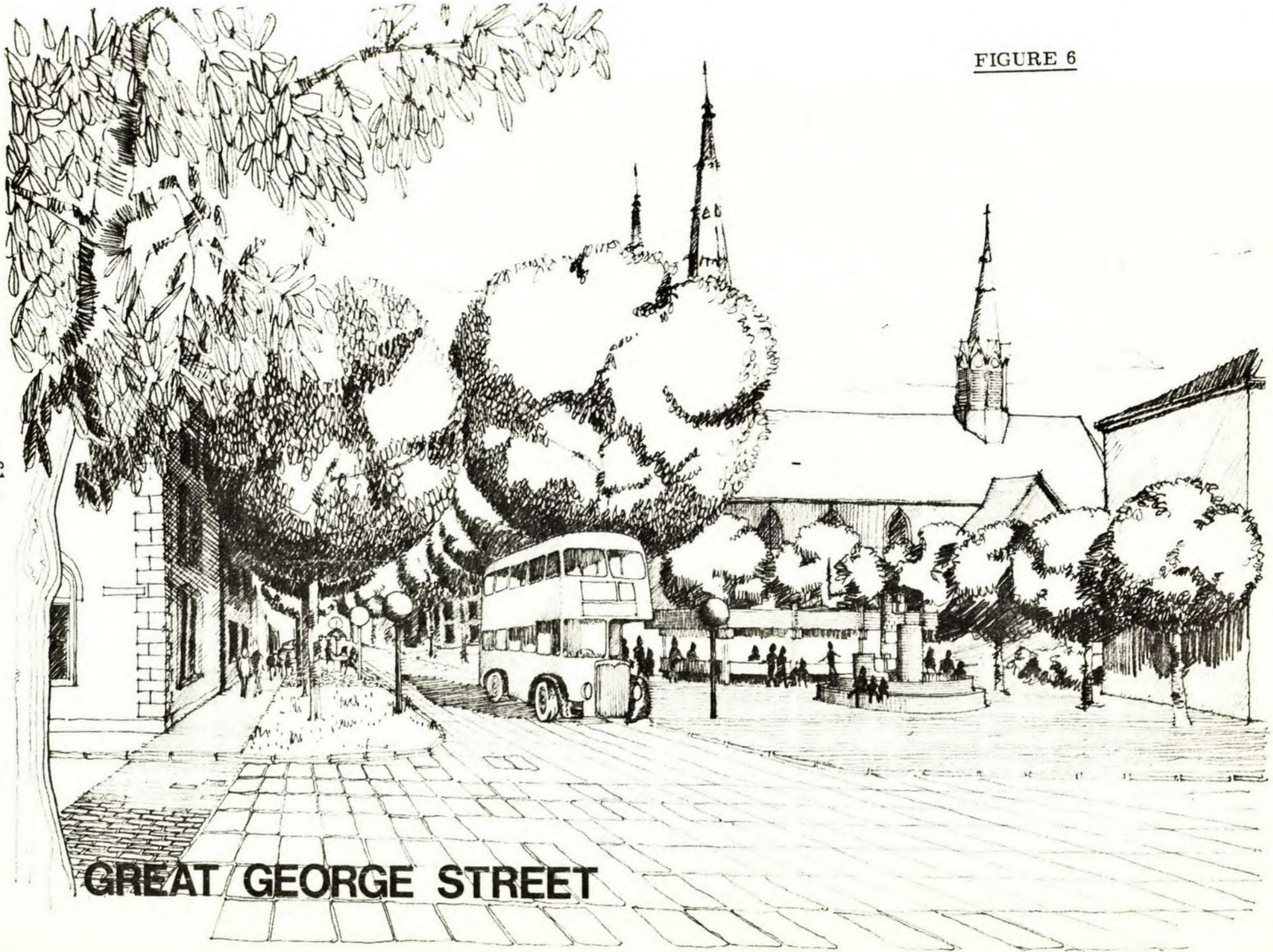
FIGURE 5



**SUGGESTED TREATMENT
CENTRAL CHARLOTTETOWN**

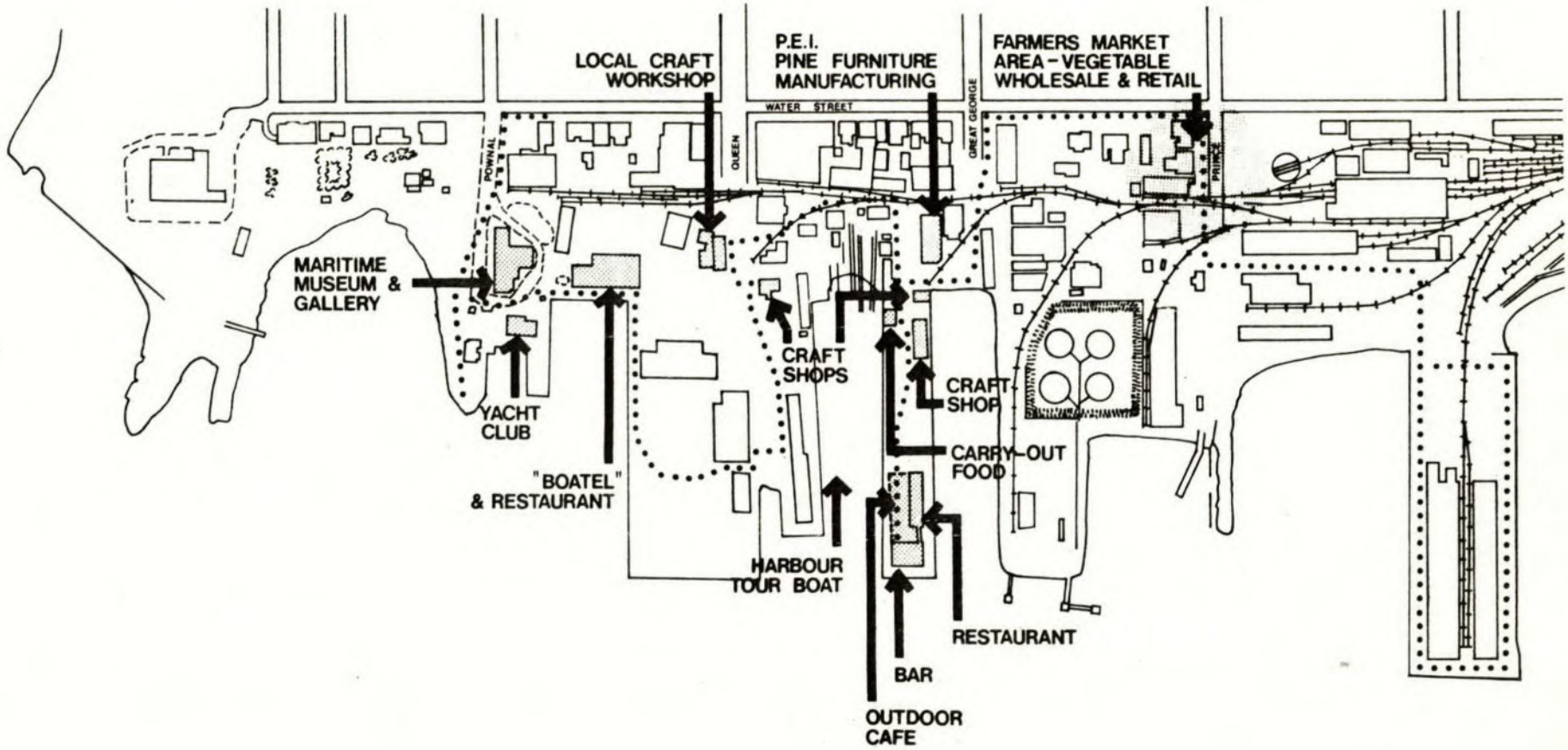
FIGURE 6

- 61 -



GREAT GEORGE STREET

FIGURE 7



SUGGESTED WATERFRONT DEVELOPMENT

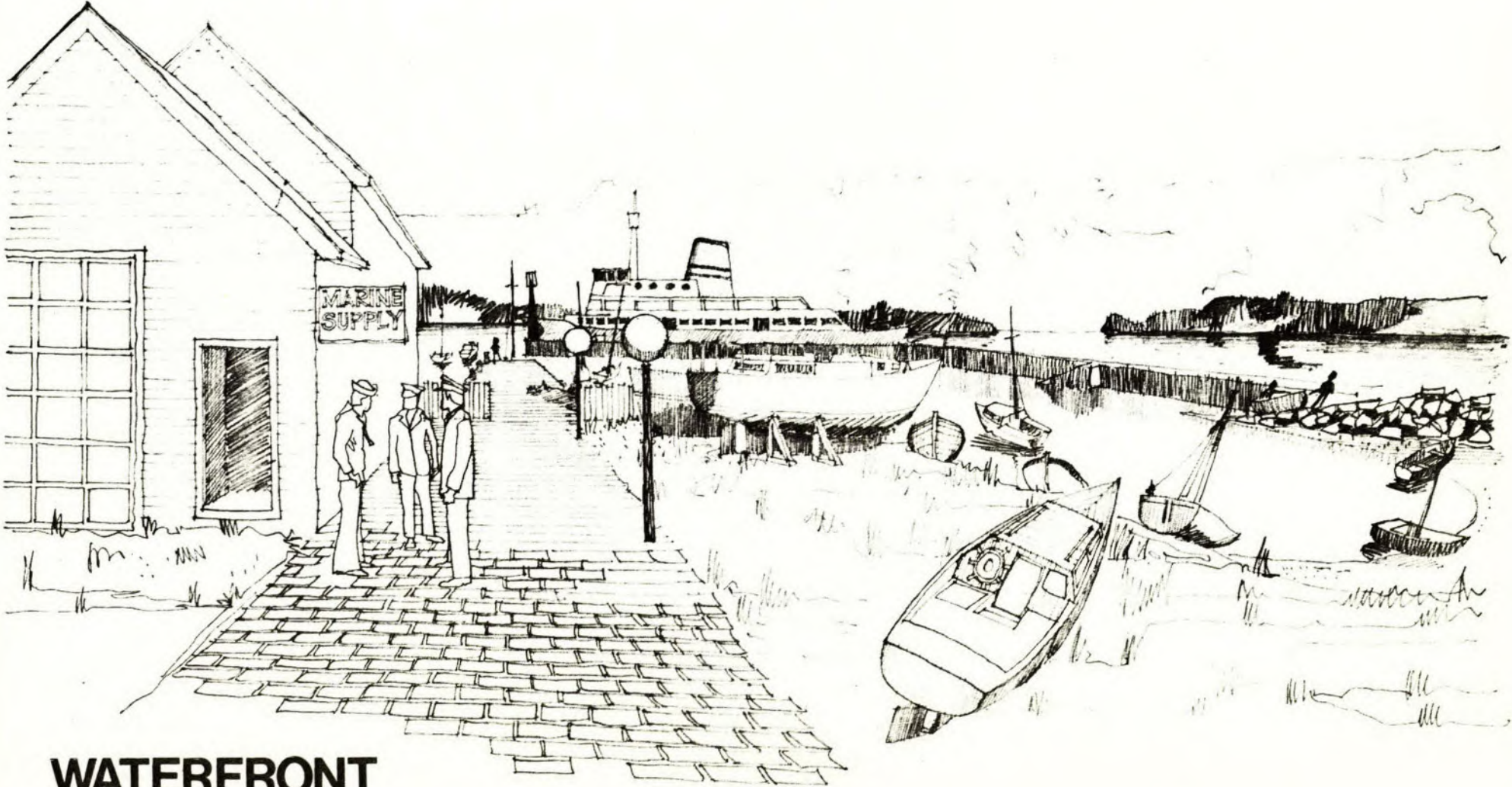
FIGURE 8

- 63 -



WATERFRONT

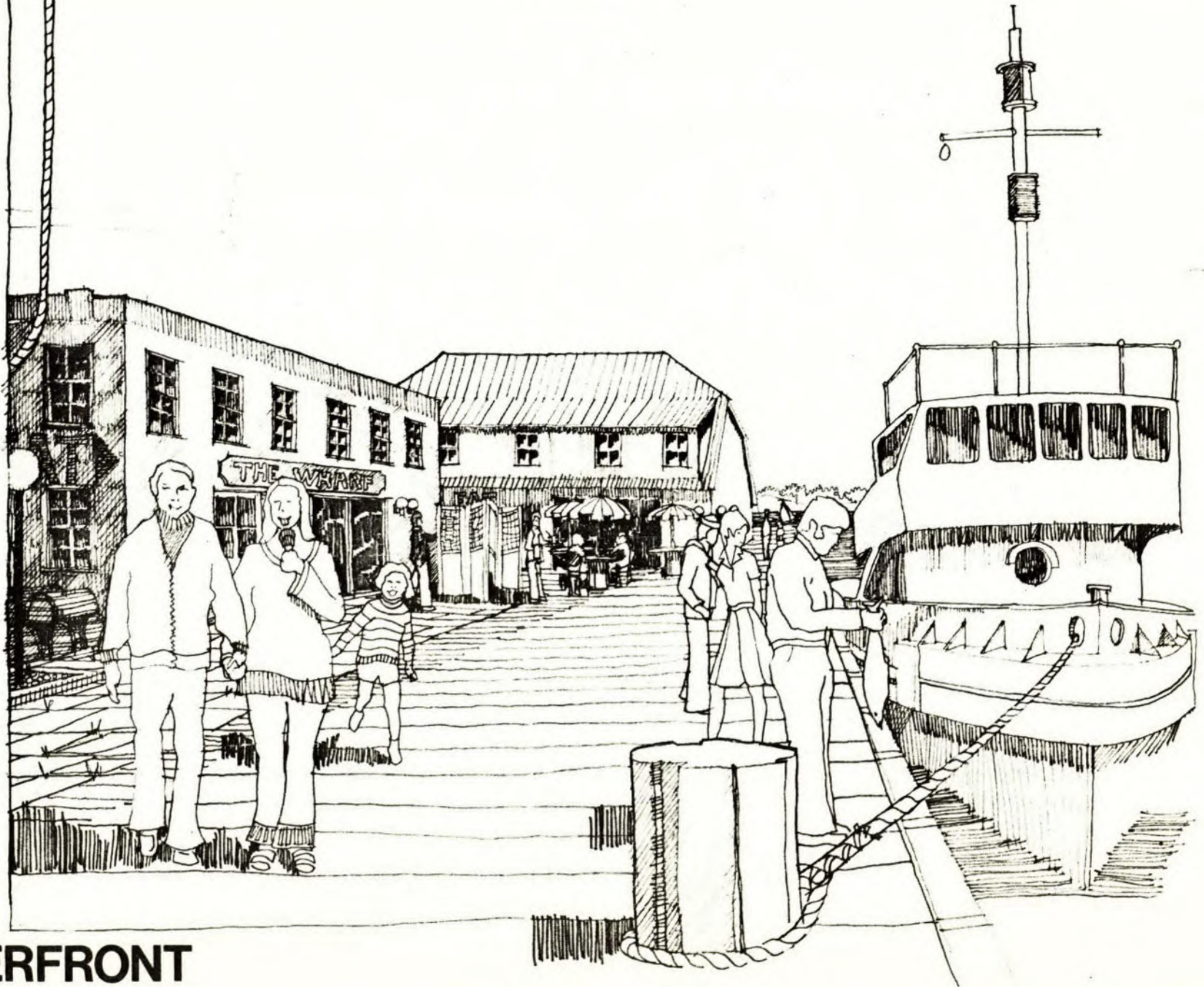
FIGURE 9



WATERFRONT

- 64 -

FIGURE 10



WATERFRONT

FIGURE 11



- 99 -

CONFEDERATION CENTRE

FIGURE 12



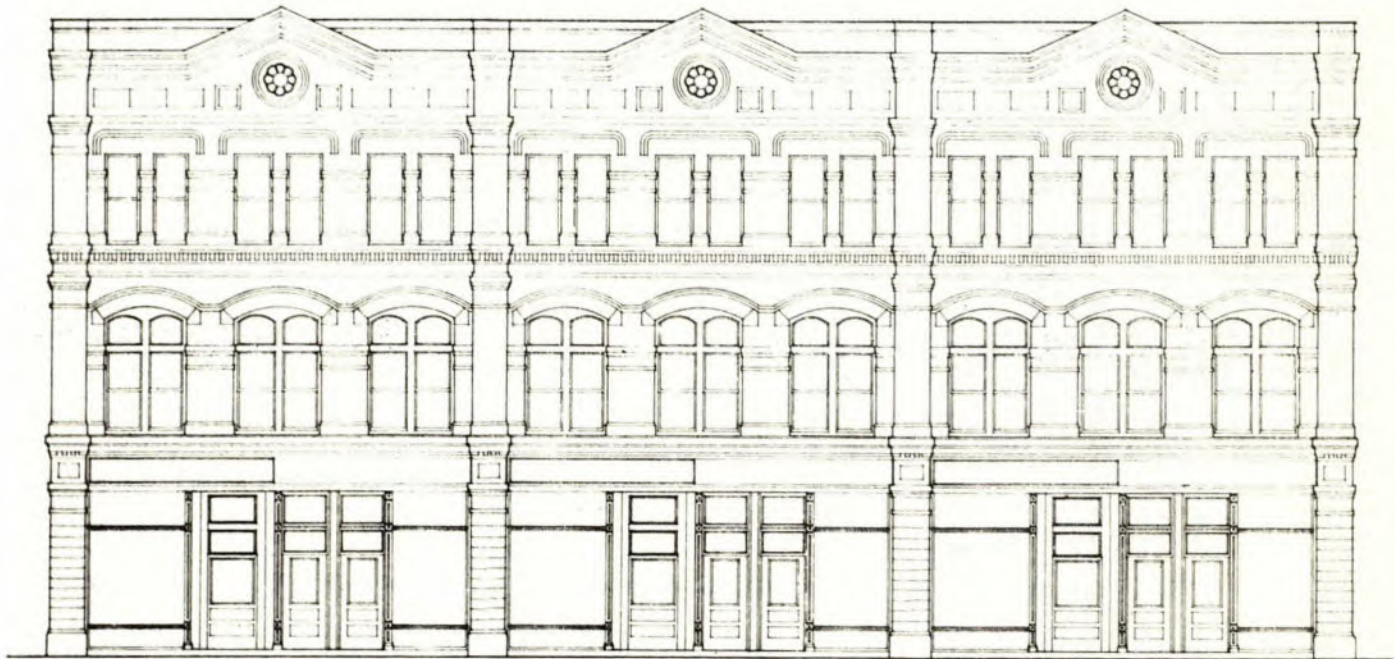
CONFEDERATION CENTRE

- 67 -

FIGURE 13



AS IT IS...

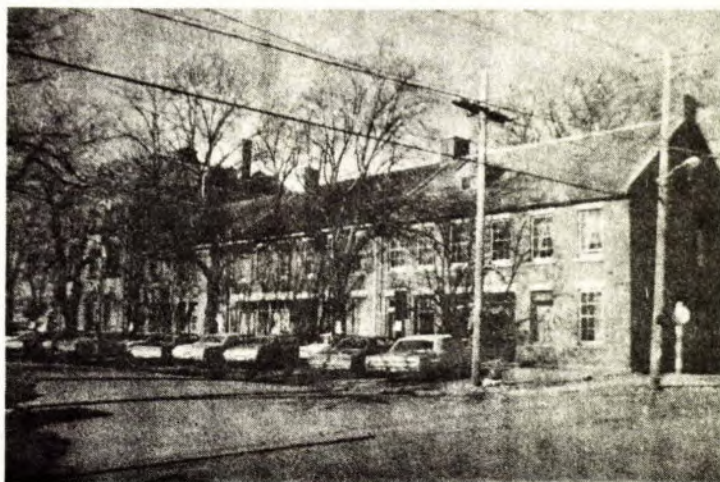


AS IT WAS AND SHOULD BE...

COMMERCIAL AREA RENOVATION

FIGURE 14

SHOPS, OFFICES AND
RESIDENCE
RICHMOND AND GREAT
GEORGE



SHOPS ON WATER STREET



RESIDENCES ON
POWNALL STREET



The city needs variety, not merely in the idiom of one area or moment, but the expressions of Island temper which have been provided by different men at different times of the province's development. The visitor must learn to understand that Charlottetown's past is an essential element of Canada's history, rather than something that is to be used up and discarded. Charlottetown Square brings out the city's rich heritage, with the objective of attracting visitors, tourists, and delegates to conferences from all of North America.

We have provided only a short summary of our thoughts on the Charlottetown area's physical development in this volume. Much more detail is presented in Volume III, Chapter III.

RECOMMENDED ACTIONS

Volumes II and III contain our detailed recommendations for the Charlottetown area's four roles and the resulting physical development plan. In this volume we present only the major recommendations in abridged form.

A. A NEW HOTEL FACILITY

We recommend that a medium sized, 175-200 room hotel be encouraged to locate in the Charlottetown area. It should have the following features:

- ▶ Either be owned or franchised through a large hotel chain. The large chain would offer the advantages of advanced reservation systems and national (perhaps international) advertising and promotion.
- ▶ Contain convention facilities suitable for meetings of up to 250 people.
- ▶ Be located in the centre core of the Charlottetown area, preferably near the waterfront. The waterfront location would stimulate development and encourage refurbishment of the Charlottetown area centre core.
- ▶ Contain the normal amenities of a "first-class" hotel; first-class restaurant, a reasonably large bar, room service, and a lobby of adequate size.
- ▶ Be of very high quality in terms of concept and design, landscaping, exterior signs, and building materials, furnishings, decor, staffing and management. It should be a landmark building of symbolic value which enhances Charlottetown as a special city and as a provincial capital.

- ▶ Incorporate parking facilities (500 - 800 automobiles) in the complex on two or three levels below grade.

If an office tower is constructed adjacent to the hotel/conference centre, we suggest a low building profile of two to three storeys. This would accommodate the office and conference facilities, and be in keeping with the existing scale of development. A hotel tower (of two to four storeys) could be located above this, on part of the roof space. Roof gardens and plazas could be developed in the remainder of the space.

The location of the hotel/conference centre is important to the development plan. It should be located:

- ▶ in central Charlottetown, the western section of the block bounded by Queen, Grafton, Pownal, and Richmond Streets. This location would afford close interrelationship with the Confederation Centre to the east and the federal government building to the south.

B. RESTAURANT

On a year-round basis, we feel that the Charlottetown area can support an additional medium-sized (100 - 200 seats) first-class restaurant. This restaurant should be located in the proposed new hotel facility in Charlottetown. To provide the maximum benefits to the tourist industry, the restaurant should:

- ▶ be located near the waterfront;
- ▶ be fully licensed;

- ▶ offer a range of food and service competitive with other Maritime, top-line hotels;
- ▶ provide nightclub entertainment;
- ▶ accept reservations to assure tourists of a "night on the town".

C. THEATRE

The Confederation Centre theatre has a capacity of about 900 seats. It's capacity is too large for summer stock theatres. We feel that there is a real need to incorporate a second, small theatre into the Confederation Centre entertainment operation. If such a theatre were available, it could be used for mime theatre, small summer stock presentations, perhaps cabaret-style entertainment, and a variety of other purposes. We recommend purchasing the Capitol theatre and adapting it for these new purposes.

D. CHARLOTTETOWN SQUARE

To create Charlottetown Square, you must:

- ▶ Maintain and upgrade the commercial centre by improving the visual appearance of buildings and streetscapes. Introduce and promote a paintup/cleanup program along the lines of the Norwich Plan. This would include designing, promoting, and directing the use of co-ordinated colour schemes for buildings and houses in the central area. Establish co-ordinated standards for street signs, introduce selective landscaping, street benches, pedestrian scale street lighting, and a uniform system of street graphics.

This upgrading concept for the downtown area, combined with modifications to principal downtown street parking patterns, will create a more pleasant shopping environment, and improve the pedestrian circulation system.

- ▶ Restore and conserve Great George Street to strengthen its role as the historical link between the commercial-cultural/historical centre and the waterfront. The restoration of this area should include:

- modification of on street parking;
- an improved planting program;
- street lighting modifications;
- pavement treatment;
- development of a graphic system;
- subsidized building maintenance program;
- encourage and monitor building uses consistent with the restored character of the area.

- ▶ Discourage redevelopment of residential areas, and preserve and upgrade housing by taking advantage of the improvements and rehabilitation amendments in the National Housing Act.

The style and scale of the majority of residential structures in the central area contributes significantly to the nineteenth century maritime character of this part of the city.

- ▶ Maintain, enhance, and increase the use and accessibility of the Confederation Centre/Province House complex as the centre of cultural activity.

Modifications to the Confederation Centre would involve:

- greater use of graphics;
- more effective identification of functions;
- improved Plaza landscaping;

- exposing the Plaza and structures more directly to the commercial centre and the waterfront links, by varying the Plaza elevations in selected areas;
 - establishing a museum of P. E. I. heritage and Confederation history in a section of Province House;
 - establishing a handcraft centre in the Court-house, together with other uses, such day use facilities as a children's day care centre, etc.
- ▶ Emphasize the traditional relationship between the waterfront and the city, maintaining the existing character and functions of the area. Proposed facilities representative of the kind of activities which can revitalize the waterfront are:
- a farmer's/fisherman's market;
 - shops and boutiques (crafts, specialty items, etc.);
 - art gallery;
 - marine museum;
 - P. E. I. replica pine furniture manufacture and sales;
 - tavern/restaurant;
 - outdoor cafes;
 - a pedestrian system providing circulation throughout the waterfront; its features should include: lighting, unique surface treatment, graphics, rain protection.

These new facilities and activities should be superimposed on the existing pattern of waterfront uses, expanding both tourist and residential interest in the area.

- ▶ Develop visual and physical pedestrian links between the commercial-cultural/historical centre of Charlottetown and the waterfront. Encourage the continued development of special interest commercial activity and upgrade the pedestrian character of Queen Street as a principal pedestrian link by incorporating the following urban design proposals:
 - paintup/cleanup program;
 - improved street planting;
 - pedestrian scale street lighting;
 - on street parking modifications.

E. RETAIL MERCHANDISING CENTRE FOR HANDCRAFTS

At present, there is no large retail merchandising centre for handcrafts in the Charlottetown area. They are marketed by small entrepreneurial outlets, or in large retail department store operations where their distinctive qualities are lost in packaged arrays of merchandise. We recommend that a retail centre be selected for display of the entire range of handcrafts available in P. E. I. This retail centre should have the following qualities:

- ▶ large enough to allow activities display areas for "craftsmen at work";
- ▶ should be located in a building of historical significance;
- ▶ located in the centre core of the Charlottetown area, as close as possible to the waterfront;
- ▶ promote handcraft sales and at the same time, provide a form of entertainment for tourists in the Charlottetown area.

F. TOURIST/CONFERENCE MANAGER

Appoint a tourist/conference manager to assume responsibility for co-ordinating meetings in the Charlottetown area. His responsibilities include:

- ▶ promote meetings, particularly for groups of approximately 400 people;
- ▶ organize accommodation and meeting space;
- ▶ follow-up on conferences and conventions to increase repeat visits and to learn what improvement is needed.

G. INDUSTRIAL PARK

We recommend that a quality industrial park be created in an area near the airport. Initially, ten acres should be serviced.

H. CIRCULATION AND PARKING FACILITIES

We recommend the following, to increase the capacity of access circulation and parking facilities.

- ▶ Removing on street parking in the vicinity of street intersections;
- ▶ Installing variable phase, synchronized traffic signals;
- ▶ permitting right turns during the red signal phase;
- ▶ Installing traffic signals at the intersection of University Avenue and Grafton Street;
- ▶ Creating a peripheral traffic route around the central business district by removing parking from Euston, Pownal, Water, and Hillsborough Streets.
- ▶ Initiate a Charlottetown area bus intercept concept pilot project.

VI

FUNDING REQUIREMENTS--
PUBLIC AND PRIVATE

Here we present a summary of the estimated public and private funding requirements and suggested phasing for the Greater Charlotte-town Urban Area Opportunities implementation. The details of all of the opportunities, showing the funding required and the phasing, appears in Table 6. In summary, we suggest:

<u>Phase</u>	<u>Year</u>	<u>Private</u> (\$'000)	<u>Public</u> (\$'000)
I	1973-75	754-799	1, 894. 5
II	1976-80	7, 175	2, 486. 0-2, 718. 0
TOTAL		<u>7, 929-7, 974</u>	<u>4, 380. 5-4, 612. 5</u>

TABLE 6

ESTIMATED PRIVATE AND PUBLIC FUNDING REQUIREMENTS
AND SUGGESTED PHASING FOR THE
GREATER CHARLOTTETOWN URBAN AREA
OPPORTUNITIES IMPLEMENTATION

PHASE I	1973 - 1975	
SOURCE:	Private \$, 000	Public \$, 000
▶ OPPORTUNITY: PANEL PLANT		
Plant	90	
Land	5	
Equipment	86	
Working Capital	53	
Government	—	37
Sub-Totals	234	37

▶ OPPORTUNITY: REPLICA PEI PINE FURNITURE PLANT		
Test Marketing & Feasibility Study		15
Plant, Equipment & Working Capital	250	
Government Grant	—	40
Sub-Totals	250	55

▶ OPPORTUNITY: TOURIST PROMOTION		
Magazine Subsidy - "This Week in PEI"		10
Upgrade Restaurant Cuisine		10
Handcraft Loan ¹ Fund		500
Bus Intercept-Pilot Project - Full Scale	—	700
Sub-Totals		1,220

¹ Loan Fund established to be paid out over a number of years.

TABLE 6 - (cont'd.)

PHASE I		
1973-1975		
SOURCE:	Private \$, 000	Public \$, 000
▶ OPPORTUNITY: "CHARLOTTETOWN SQUARE"		
<u>Confederation Centre:</u>		
Purchase Capitol Theatre		100
Refurbish		25
Portable Ticket Booth		1
Marquee		2
Renovations to:		
. Confederation Centre Province House Courtyard		50
. Confederation Centre and Sidewalks along Richmond, Queen and Grafton Streets		<u>100</u>
Sub-Totals		278
<u>Great George Street:</u>		
Sidewalk Facilities		200
Park Area, Transit Terminal		<u>85</u>
Sub-Total		285
<u>Waterfront:</u>		
Sidewalks		10
Brick Walkways		14
Signs		3
Lighting		7.5
Wharf Buildings:		
Tavern/Restaurant	220-265	
Shops	25	
Outdoor Cafés	<u>25</u>	
Sub-Totals	270-315	<u>34.5</u>
<hr/>		
PHASE I - TOTALS	754-799	1,894.5

TABLE 6 - (cont'd.)

PHASE II		1976 - 1980	
SOURCE:	Private \$, 000	Public \$, 000	
▶ OPPORTUNITY: "CHARLOTTETOWN SQUARE" (cont'd.)			
Convert Part of Province House to a Museum			220-330
Convert Court House to a Craft Centre			128-250
Magistrates' Court Conversion			<u>36</u>
Sub-Totals			384-616

▶ OPPORTUNITY: HOTEL/CONFERENCE CENTRE			
175 Rooms at \$22M Per Room	3,850		
Hotel Sewer			<u>15</u>
Sub-Totals	3,850		15

▶ OPPORTUNITY: BUS INTERCEPT - FULL SCALE			
Based on \$140M/Annum			<u>700</u>
Sub-Totals			700

▶ OPPORTUNITY: INDUSTRIAL PARK			
Land Acquisition and Development Costs			1,160
Transportation Requirements			<u>115</u>
Sub-Totals			1,275

TABLE 6 - (cont'd.)

PHASE II 1976 - 1980		
SOURCE:	Private \$, 000	Public \$, 000
▶ OPPORTUNITY: TRAFFIC AND PARKING SOLUTIONS		
Peripheral Traffic Route - Signals		35
Synchronize Traffic Signals		43
Sidewalk Renovations		34
Parking Facility	<u>2,800</u>	<u> </u>
Sub-Totals	2,800	112
<hr/>		
PHASE II - TOTALS	6,650	2,486-2,718

APPENDICES

APPENDIX A

As an interim measure the Charlottetown City Council might consider:

- 1) Creating a central development area bounded by Euston Street, Weymouth Street extended to the shore line, the shore line itself, and Rochford Street extended to the shore line.
- 2) Within this central development area:
 - a) apply a "restoration" zone (described hereafter) to all lots having frontage on Great George Street between Richmond and Water Streets;
 - b) change the zoning R3, General Business and Industrial Zones, to "Special Business Zones" (as shown herewith);
 - c) maintain the "Institutional and Recreational" Zone other than where it has been superseded by the Restoration Zone;
 - d) amend the Special Business Zone 5. A. 2 a) by deleting the word "preceding" occurring between "all" and "Zones". Delete "(R1, R2, R3 and General Business Zones)". Delete 5. A. 3, 5. A. 4, 5. A. 5, and 5. A. 6. Amend 5. A. 7 to read 5. A. 3 and add the following:

"5. A. 4. In a special Business Zone, buildings, structures and lands shall not be used where, in the opinion of the City Council the use is, or would be, dangerous to persons or property, emit noxious or offensive fumes, or cause a nuisance".

The restoration zone referred to under 2)a) above could read as follows:

- 1) No building or land shall be used for any purpose other than,
 - a) That existing at the time of the enactment of this by law.
 - b) The original purpose for which the building or land was used as shown on file of record held by the City Engineer.

or

 - c) A purpose deemed by City Council to be consistent with the objectives of restoring the original appearance, character, and use of land and buildings within the zone.
- 2) No building shall be erected, altered or maintained except in conformity with the original architectural form and structure of the area as shown on the file of record held by the City Engineer.
- 3) An owner of land and/or buildings at the time of the passing of this by law may, within one year, request City Council to purchase the property affected by the by law. Should Council decline to purchase the property, the owner may request the change of use to one of those permitted in any other zone in the zoning by law.

364

11
11
11

