

**Exploring the Impacts of the Sport,  
Hospitality, and Entertainment District  
(SHED):  
Winnipeg's First Tax Increment Financing  
District**

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## **Executive Summary**

Tax Increment Financing (TIF) is perhaps the most popular economic development incentive used at the local level in the United States. TIF is less widely used in Canada, where Winnipeg is only one of three Canadian municipalities that have used TIF to date. This research seeks to explore the impacts of Winnipeg's first TIF district, the Sport, Hospitality and Entertainment District (SHED) to understand the impacts of TIF within Winnipeg's local context.

This research explores the public benefit served by the SHED TIF in downtown Winnipeg. It looks at the changes to property values in the past ten years within and around the district and included a survey to understand how residents downtown feel about the changes brought by new developments in the SHED.

Findings from the research identify the TIF district did successfully direct investment and property value appreciation to the SHED, with property values within the SHED having grown more quickly relative to the rest of downtown since 2012. Despite this, the findings show property values did not appreciate as quickly as they did in the three years before the SHED's establishment as a TIF district.

Results from the survey indicated residents have mostly positive perceptions of the SHED and the new developments it is home to. Specific positive impacts of development identified included increased foot traffic, and the new restaurants, bars, and events that have been added by new developments. Despite these benefits, however, residents remain concerned about a lack of community amenities, such as a full-service grocery store, housing affordability, and ongoing safety concerns downtown.

This research presents an overview of both the qualitative and quantitative changes that have taken place in the SHED over the past ten years. The survey identified key challenges that continue to be faced downtown which should be considered in future public spending downtown to build desirable complete communities in Winnipeg's core.

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## **List of Acronyms**

**CAI** – Core Area Initiative

**DCSP** – Downtown Community Safety Partnership

**EPC** – Executive Policy Committee

**PADS** – Portage Avenue Development Strategy

**SHED** – Sport, Hospitality, and Entertainment District

**TIF** – Tax Increment Financing



# 1. Introduction

## 1.1 Scope & Goals of the Research

Municipal governments face many challenges in raising the revenue required to finance the infrastructure and services they need to support their population. Property taxes, the primary municipal funding source, are considered politically difficult to increase. Adding to this challenge is that municipalities cannot run deficits to cover their operating expenses in the way other levels of government can. In this context, Tax Increment Financing has become an attractive tool for municipalities looking to attract development on a limited budget.

Tax Increment Financing (TIF) is a development incentive that can be applied across a defined geographic area or to individual projects. Within TIF districts, the amount of taxes developers pay on a property will be frozen at the base year, which is the year the district was established. The incremental taxes, which are the anticipated future property taxes the municipality expects to gather as a result of development are then reinvested back into the TIF district. While the structure and manner of payout for TIF districts vary by location and project, common means that tax increments are reinvested in the district include public realm investments, infrastructure investments, or subsidies to the developer (Briffault, 2010; Kane & Weber, 2016). This tool thus allows municipalities to attract development to a given area without raising property taxes to pay for the subsidies or infrastructure improvements required. TIF however is also controversial. It has a long history in the United States, where it has not always been used to support the “public good”. Given TIF involves the reallocation of taxpayer dollars, it is important to understand how, and if the projects it supports are positively affecting the citizens whose tax dollars are supporting them.

In Winnipeg, TIF has been implemented for various projects, though only one TIF district has been designated to date. This research explores the impacts of the city’s first TIF district, the Sport, Hospitality, and Entertainment District (SHED). The SHED is an 11-block area around the Canada Life Centre downtown, and since its designation as a TIF district in 2012 it has

seen several new developments with more currently under construction.

The goal of this research is to explore: 1) the impact that the TIF designation has had on property values, and 2) how residents living within and near the SHED feel about the new developments and life in their community more broadly.

Through insights gained from residents, this research also hopes to suggest future avenues where funding in the SHED could be used to the benefit of the community. As downtown continues to recover from the pandemic, improving community infrastructure that will help attract a greater residential population will be important for ensuring the area's post-pandemic future. Considering the role TIF could play in financing these improvements is an exciting direction this research suggests would be fruitful ground for future study.

## **1.2 Research Questions**

This research was guided by the following questions:

- 1) How have property values in downtown Winnipeg's Sports, Hospitality, and Entertainment District (SHED) changed in relation to the rest of downtown since the inception of the TIF district?
- 2) How do residents living downtown feel about the development that has taken place in the SHED TIF district?

## **1.3 Structure of the Document**

This research has been organized into seven sections. Section 2 following the introductory section provides an overview of the research methods used to respond to the research questions. The research methods include a property value analysis, and a resident survey, both of which are discussed in this section.

Section 3 provides a review of relevant literature to help to inform the two research questions. This section discusses the history of TIF, TIF's effectiveness in raising property values, characteristics associated with

property value growth, and literature regarding resident perceptions of development. The literature review concludes by locating this research project within the existing literature and noting the gaps it hopes to address.

Section 4 discusses the history of revitalization in downtown Winnipeg, as well as the creation of CentreVenture, the city's arms-length development agency responsible for the creation of the SHED. This section also provides context regarding the new development that has happened within the SHED and the legislative framework for Tax Increment Financing for the City of Winnipeg and the Province of Manitoba. This section concludes by discussing the COVID-19 pandemic and its impacts on downtown given the relevance this has to both the property value analysis and findings from the resident survey.

Section 5 of the report discusses key findings from my property value analysis and resident surveys. These findings are then discussed further in relation to the literature review and context section in Section 6.

In the final section, I revisit the research questions to discuss the answers I drew from my research. I also provide some suggestions for areas of further research and conclude by offering some final thoughts on the project.

## **2. Research Methods**

This section provides an overview of the research methods that were used to answer my two research questions, as well as the limitations of each research method. This research included an exploration of property value changes downtown since the designation of the SHED as a TIF district, as well as surveys to explore resident attitudes towards the SHED.

### **2.1 Property Value Analysis**

The use of TIF to incentivize development rests on an assumption that property values within and surrounding the TIF district will appreciate as a result of new development (Tomme, 2005). For this reason, studies have tended to focus on TIF's impacts on property values and other economic indicators (Briffault, 2010). Given the central importance of property values to Tax Increment Financing, I chose to explore how property values have changed in the SHED relative to the rest of the downtown zoning by-law since the district was first established in 2012.

#### **2.1.1 Data sources**

Assessment data was obtained from two sources, the City of Winnipeg Assessment and Taxation department, and the City of Winnipeg's Open Data Portal. Historical assessment data for the years 2009 and 2012 was provided by the Assessment and Taxation department, while the most current data (2021 market values) was downloaded through the city's Open Data Portal. Both sets of data were obtained as shapefiles and were analyzed using a combination of ArcGIS Pro and Microsoft Excel. References for all three data sets can be found in Appendix A.

#### **2.1.2 Property Value Analysis**

With a central question in TIF literature being whether the investment would have happened in the absence of a TIF designation, I first calculated the growth in assessment values for properties within the downtown zoning by-law boundary from 2009-2012 to establish a base rate of growth for the area. This was done using the following equation:

$$((2012-2009) \div 2009) \times 100 = \% \text{ change}$$

This process was then repeated using the data from 2012 and 2021. I calculated the total change in assessed values for the entirety of the downtown zoning by-law from 2012-2021, as well as the rate of change for the parcels within the SHED, and the rate of change for the downtown zoning by-law excluding the SHED parcels. These calculations were done using the following formula:

$$((2021-2012) \div 2012) \times 100 = \% \text{ change}$$

A summary of the Property Value Analysis findings is provided in Section 5.1.

### **2.1.3 Limitations**

There are several limitations to my property value analysis, and the results should be considered only as a preliminary exploration of how assessment values have changed since the establishment of the SHED TIF. First, it is possible there were inaccuracies in the data obtained from the City of Winnipeg Assessment and Taxation department. The 2009 and 2012 data sets included numerous duplicate attributes that had to be removed by eliminating duplicates with the same roll number. Second, this research did not control for variables that may have contributed to property growth change such as market conditions or public investments made in other areas of downtown. It also doesn't control for external factors such as economic changes that may influence property values. Results may differ with a more sophisticated analysis that controls for additional variables.

### **2.2 Intercept & Online Survey**

This research also included a survey for residents living within a five-minute walking distance of the SHED to understand attitudes toward new developments that have taken place in the area. Respondents were first asked to answer an eligibility question, by indicating whether they lived within the blue boundary of the map shown in Appendix B. Respondents were also asked to provide consent to the three questions included in the consent form attached in Appendix C. A full copy of the survey questions is included in Appendix D. Surveys were chosen as a research method due

to their suitability for collecting information about public opinions (Babbie & Roberts, 2018).

### **2.2.1 Survey Dissemination**

The survey was initially intended to be conducted as an intercept survey, and administered by approaching people within the downtown eligibility boundary and asking whether they were residents willing to complete the survey. Due to an initial low response rate and the challenges of conducting an intercept survey during the winter, I amended my Research Ethics Board Application to gain approval to disseminate the survey online as well. I also received approval in this amendment to introduce a \$50 gift card giveaway survey participants could enter as an incentive to encourage participation. Survey participants were given the option to provide a phone number or email address in the final survey question (see Appendix D) if they wanted to enter the gift card giveaway. Once the survey period concluded, I separated the contact information provided for the giveaway into a separate excel sheet separate from the survey responses. I then used an excel function to randomly select the gift card winner.

In total, two in-person intercept surveys were conducted and included in the analysis. 187 online surveys were completed, of which 118 were included in the analysis, for a total of 120 survey responses. The two in-person intercept surveys were conducted outside of the downtown Family Foods at 120 Donald Street. This location was chosen due to the likelihood residents would frequent the store. The online survey was disseminated in a few different ways. Only one of the five organizations I contacted agreed to share my survey on their social media profile. The organization that shared the survey serves the newcomer population in downtown Winnipeg, and their post was reshared by 3 smaller organizations serving a similar demographic. I also posted the survey to the r/Winnipeg Reddit page and distributed QR codes linked to the online survey form at bus stops within the eligibility area over a two-week period in January 2023. To distribute the QR code, I approached people at bus stops using my ethics-approved recruitment speech and provided them with the QR code link if they indicated they lived downtown and were interested in participating.

### 2.2.2 Surveys Removed

In total, 69 surveys were removed from the analysis. A large number of surveys were completed after the first community organization shared the survey link, many of which appeared to have been completed by automatic software presumably due to the inclusion of the gift card giveaway. Several surveys were also removed due to the respondent answering “no” to either the eligibility question or one of the consent questions. The criteria for removing surveys were as follows:

- **Repeated responses to open-ended questions:** 37 surveys were removed due to using identical language in the open-ended questions.
- **Repeated email names/email patterns:** 25 surveys were removed based on the email provided for entry in the gift card giveaway. This includes those where the same name was used repeatedly and those where similar patterns in the email addresses indicated it was someone trying to win the gift card giveaway.
- **Don’t live downtown or answered no to a consent question:** 7 surveys were removed due to answering “no” to the question asking if the respondent lives within the eligibility boundary, or because they answered “no” to a consent question.

### 2.2.3 Survey Analysis

Surveys were analyzed using Microsoft Excel, and open-ended questions were coded using a thematic inductive coding framework. Inductive coding is distinct from deductive coding in that it allows for themes to be identified from the data itself rather than being drawn from previous literature or studies on the topic. While all inductive coding is nonetheless informed by the researcher’s previous knowledge of the topic, this approach is useful for areas of new research where there are no studies available to replicate or refute (Marks & Yardley, 2004). The lack of research examining residents’ quality of life in relation to TIF informed my decision to use the inductive coding method. Following several reviews of the open-ended questions, I decided to code responses according to the eight major themes that emerged in people’s responses. Some responses addressed multiple thematic areas and were coded for both. The eight themes identified were

Safety, Bringing people downtown, Affordability/Gentrification, Amenities & Events, Streetscaping, Transportation, COVID-19, and Systemic Social Challenges. A summary of survey results can be found in Section 5.

#### **2.2.4 Survey Limitations**

There are three primary limitations associated with the surveys I conducted. The first is the relatively short period over which the survey was available online. The amendment process to disseminate the survey online took three weeks to get approved and was only available online to the public from January 27th, until February 11th, 2023. I was able to obtain enough responses in this limited time; however, due to the timelines for the Capstone course I needed to begin analyzing the data. Having a longer survey dissemination period may have allowed me to share the online survey more widely and solicit responses from a greater diversity of respondents.

The second limitation associated with this research is that most of the data was obtained through the online survey. The use of an online platform may have excluded potential participants who do not have access to the internet or do not frequent the sites where my survey was shared. Additionally, as mentioned in the previous section, 69 surveys were removed as they showed evidence of suspected spam responses. It is possible additional spam responses were missed during the removal process and included in the data analysis.

Finally, results from this survey should not be generalized to the entire downtown population. Generalizability would have required a statistically significant sample of the downtown population to participate (Babbie & Roberts, 2018). Rather, these surveys should be taken as insight into resident attitudes that merit attention in further research and phases of public investment in the SHED.



### **3. Literature Review**

As the first step in the research process, I conducted a literature review. This process allowed me to identify themes in the existing TIF literature relevant to my research questions, as well as gaps my research may help to address. The literature review covers several topics relevant to my two research questions. First, it looks at the body of literature on TIF, examining the historical context in which it emerged, its application in Canada, and its potential effects on property values. Second, this literature review also considers the existing literature regarding residents' perceptions of development to provide context to the themes that emerged in my survey findings. The literature review concludes by reviewing the gaps in the literature.

#### **3.1 History of TIF**

TIF is an economic development incentive and financing mechanism considered by some to be the most popular development incentive used at the local level in the United States (Briffault, 2010). Typically, TIF has been applied across a set geographic area, or district, that is established for a period of between 20-30 years (Tomme, 2005). TIF was first used in California during the 1950s by municipalities looking to raise the local contribution required for them to be eligible to receive matched federal urban renewal funding (Briffault, 2010). This was in a context where a new bill had been introduced in California that capped the ability of municipalities to raise property tax rates. Faced with the need to raise funds without raising property taxes, TIF allowed municipalities and counties to raise the necessary capital to support their economic development projects (Tomme, 2005). TIF's emergence as a tool for funding urban renewal is relevant to understanding two legislative preconditions of TIF that are often associated with the mechanism, the findings of blight and the "but for" test.

Having emerged as a tool for urban renewal, TIF has often included the legislative requirement of a finding of blight. Blight is an ill-defined concept that generally was originally used to reference poor housing conditions and justify the use of expropriation and public funds for urban renewal planning. While initially used in reference to housing, blight soon became a catch-all term for undesirable social, or economic conditions in urban

renewal planning (Wagner, 2018). Legislated definitions of blight have often been ambiguous and highly subjective, with one author describing a blighted area as “a district which is not what it should be” (Gordon, 2004, p. 306). By keeping the definition of blight vague, it has been easy for governments to justify the finding of blight to suit their political agendas. Some argue this has created the opportunity for abuse of TIF funding by using it in unblighted areas where development would have been likely to occur regardless (Gordon, 2004; Tomme, 2005; Wagner, 2018). This is considered a problem as it redirects tax revenue that would have otherwise supported essential municipal services (Blackmond Larnell & Downey, 2019). Definitions of blight have also been noted to disproportionately target non-white, low-income communities, where it was used as an excuse to redevelop inner city neighbourhoods for large-scale commercial projects or highway infrastructure (Weber, 2002). As a result of criticism surrounding its definition, the inclusion of blight criteria in TIF legislation has declined since the 1980s in the United States (Byrne, 2010).

Due to the challenges of defining blight, the “but for” test has also been a common requirement included in legislation to substantiate findings of blight and determine whether the use of TIF served a public benefit. As implied by the name, the but-for test asks whether a development would have happened but for the presence of TIF (Wagner, 2018). If a development would not have happened in the absence of TIF, then the government and the public should benefit from the expansion of the property tax base. If the development would have happened regardless, then a public use was not served by the TIF. The but for test has also been subject to criticism, as it is generally considered fairly easy for a municipality or developer to claim TIF is needed for development to move forward, and difficult for anyone to prove otherwise (Tomme, 2005). Additionally, others have noted the “but for” test does not consider whether a development would have happened elsewhere within the same municipality in the absence of the TIF. Several authors note TIF may be used to merely shift where development is taking place within the same taxing municipality to capitalize on the growth in incremental property taxes at the expense of the rest of the municipality (Anderson, 1990; Dye & Merriman, 2000; Gordon, 2004; Kane & Weber, 2016).

A lack of Canadian studies is a key gap in TIF literature. While there is a wide body of past studies in the United States dating back many years, TIF has a much more recent history in Canada, having first been implemented in Alberta in 2007 (Spahlinger & Wanye, 2019). To date, Manitoba, Alberta and Ontario are the only three Canadian provinces where TIF legislation has been enacted, though projects have only ever been implemented in Edmonton, Calgary, and Winnipeg. Therefore, a lack of precedents to study is the primary reason for this gap in the literature. It is interesting to note however that TIF legislation in Manitoba and Alberta lacks a defining feature of American TIF legislation, the inclusion of a “but for” criteria. This has meant TIF districts in both Manitoba with the SHED and Calgary’s Rivers District with the Bow have included existing developments that can be relied upon to appreciate and create tax increment as time goes on (Sroka, 2016).

### **3.2 Effects on Property Values**

TIF’s popularity can largely be attributed to the notion it is a “self-financing” tool for encouraging development. Municipalities can allocate funding to stimulate investment without the need to raise property taxes, under the assumption the debt will be offset by catalyzing new development and property value growth (Briffault, 2010; Tomme, 2005). Due to its popularity and widespread use across the United States, there is a large body of literature studying TIF’s effects on property values, job creation, and blight. It is challenging however to draw definitive conclusions regarding how effective TIF will be in a particular setting given the diversity of findings regarding how TIF operates in different contexts. This task is made more challenging given the great diversity in scales across which TIF has been applied. While the SHED represents a total land mass of 0.21km<sup>2</sup>, Chicago, which is considered the jurisdiction where TIF has been used most readily has seen districts range in size from 0.02km<sup>2</sup> to 29.51km<sup>2</sup>, with an average size of 1.64km<sup>2</sup> (Blackmond Larnell & Downey, 2019).

While the central premise of TIF is it raises property values, there are mixed findings as to its success in doing so (Briffault, 2010; Byrne, 2006; Wagner, 2018). A study that examined property value appreciation in 134 TIF districts in Chicago between the years of 2009 – 2013 found that

change in property values ranged from -91.55% to 5995.94%, with a mean increase of 300% (Blackmond Larnell & Downey, 2019). Other studies have examined differences between municipalities that have adopted TIF and those that haven't. A study in Michigan found municipalities that had adopted TIF experienced higher property value growth than non-adopting municipalities (Anderson, 1990). Similar findings came from a study in Indiana which found median owner-occupied housing values were 11% higher in cities that had adopted TIF (Man & Rosentraub, 1998). However, contrary to the studies from Michigan and Indiana, Dye & Merriman (2002) found in their study of Metropolitan Chicago that TIF adoption had a negative impact on municipal property values. The ability of TIF projects to raise property values sufficiently to offset the loss in tax revenues has also been debated, with some authors finding TIF projects do not pay for themselves, and only break even over a long-time horizon (Greenbaum & Landers, 2014).

To date, only one quantitative study has examined the effectiveness of a Canadian TIF project. This study examined Edmonton's efforts to increase wealth density (a measure of property values and population density) downtown through the use of their Community Revitalization Levy, a financing mechanism that operates in the same manner as TIF (Jakar et al., 2022). They found that of the three TIF districts in downtown Edmonton, the Capital District which is home to Edmonton's NHL arena saw the greatest increases in property values. These authors caution the long-term success of the district remains an ongoing question given their analysis was relatively early in the TIF's lifespan (Jakar et al., 2022). Two papers have discussed Calgary's River District Community Revitalization Levy (Spahlinger & Wanye, 2019; Sroka, 2016); however, neither has included a quantitative assessment of the district's performance. Both papers' evaluations of Calgary do question the use of the CRL given it is almost entirely reliant on the property value appreciation of The Bow project, a skyscraper office tower that was announced in 2006, before the CRL's establishment in 2007 (Spahlinger & Wanye, 2019; Sroka, 2016). The only public study that has examined the use of TIF in Winnipeg was a 2015 thesis which used interviews to explore how the planning profession can influence the positive development of TIF as a financial tool. This research

did not include a quantitative assessment of the TIF's impact on property values (Copping, 2015).

### **3.3 Characteristics Associated with Property Value Growth**

Conclusions regarding the characteristics associated with the greatest property value growth are similarly inconclusive and varied across studies. In examining property value growth in Chicago's industrial TIF districts, Weber, Bhatta and Merriman found property values in industrial TIF districts may be lower than parcels that were not included in a TIF district (Weber et al., 2003). This is in contrast to a study by Byrne (2006) which was conducted across the whole of Illinois and found that industrial TIF districts experienced the highest levels of property value growth from within the land use categories examined. In examining the spillover impacts of TIF districts on single-family housing values in Chicago, it was found that being located near industrial TIF districts was associated with a decrease in residential property values, whereas mixed-use districts were associated with the increased value of nearby homes (Weber et al., 2007).

Studies looking at the relationship between TIF and local employment levels have found similarly mixed results. While some have found a positive correlation between TIF and local employment levels (Man, 1999), other studies indicate a greater complexity to the relationship. Byrne's 2010 study found that only TIF districts supporting industrial development were related to an overall increase in employment within the municipality, while retail TIF district's employment effects indicated a shifting effect where jobs were being relocated from elsewhere within the municipality (Byrne, 2010).

Various TIF studies have also included an examination of the relationship between neighbourhood demographics, and growth in property values. Byrne's (2006) study in Illinois found TIFs with a larger proportion of white residents relative to the rest of the municipality experienced higher rates of growth. Byrne attributed this finding to the possibility of discrimination in the real estate market (Byrne, 2006). Counter to Byrne's findings, a 2019 study examining the relationship between blight, race and property values in Chicago found TIFs in severely blighted communities with large non-white populations were associated with the largest changes in property values (Blackmond Larnell & Downey, 2019). Despite this finding, they

stress these changes in property values were not reflected in economic improvements for the communities in which the TIF was located, and identify that rising property values may negatively impact residents' housing costs (Blackmond Larnell & Downey, 2019). These authors stress the need to consider TIF in terms other than just property value appreciation, stating:

To truly understand whether TIF improves communities, it is critical to account for the change in equalized assessed valuation as well as other improvements to the community and residents' quality of life (e.g., availability of quality affordable housing, commercial activities, and employment opportunities) (Blackmond Larnell & Downey, 2019).

Given the relative lack of studies examining these more qualitative aspects of TIF, the next section provides a review of the literature regarding resident perceptions of development to better inform the interpretation of findings from the resident survey.

### **3.4 Resident Perceptions of Development**

Several studies have noted attitudes towards development differ depending on how long people have lived in the area being developed. Generally, older residents were noted to have less positive attitudes toward new spaces (Antunes et al., 2020; Doucet, Van Kempen, et al., 2011; Houston & Zuñiga, 2021). Residents who had lived in an area longer were more likely to associate spaces with their previous use, whereas newer residents were more likely to consider the opportunity new spaces offer (Antunes et al., 2020).

The existence or lack of services and amenities has also been found to play a large role in the way residents perceive new developments. In a 2011 study examining the flagship redevelopment of the Kop van Zuid in Rotterdam, researchers found residents had a more positive attitude towards the area than was anticipated. The researchers associated this with the development's inclusion of a transportation investment, which vastly improved public transit connections, and also the introduction of retail services that had previously been missing from the area (Doucet, Van Kempen, et al., 2011). A study examining resident perceptions of tourism

development in Old Montreal found a lack of community amenities was a primary concern for residents, being noted by more than two-thirds of residents as a reason they would consider moving away from the area (Ananian et al., 2018).

Lastly, gentrification is another theme mentioned in several studies. While sometimes this was brought forward regarding current conditions, such as new residents moving in, rising rents, and smaller units (Silverman et al., 2019), gentrification was also perceived as a future risk anticipated with the redevelopment of vacant plots (Antunes et al., 2020). While gentrification in the past referred to a process driven by the middle class moving into under-valorized neighbourhoods and reinvesting in them, some scholars argue for the inclusion of new build developments as an example of government-led gentrification (Davidson & Lees, 2005; Doucet, van Kempen, et al., 2011). With new build developments, it is likely indirect displacement, where residents are unable to access housing due to rising costs, and sociocultural changes that render the neighbourhood less welcoming may occur (Davidson & Lees, 2010). Due to the relative challenge of quantifying this form of displacement, understanding resident perspectives on neighbourhood change can be an important means of understanding whether indirect displacement is taking place.

These themes highlight the unsurprising fact that new development is largely perceived by residents in terms of how it influences their quality of life. Connection to place, proximity to amenities, and cost of living are all important factors that shape how residents feel about developments. While several authors have highlighted the need to examine this topic as it relates to TIF (Blackmond Larnell & Downey, 2019; Weber et al., 2007), to date the literature remains predominantly focused on the quantitative outcomes of TIF districts, a gap this research seeks to address.

### **3.5 Summary**

This literature review has examined previous studies regarding TIF and resident perceptions of development to better inform the research project. The literature review has highlighted the importance of understanding the local context for the SHED TIF district given the variety of conclusions regarding characteristics that impact TIF performance. Two gaps in the

literature this research addresses have also been identified. By examining an example of an understudied TIF district in Winnipeg, the project contributes to the small body of literature that discusses TIF in Canada. Second, this project explores how residents in downtown Winnipeg feel about the developments within the SHED TIF district and contributes to an understanding of the relationship between TIF developments and residents' quality of life.



## **4. Context**

The SHED is an 11-block area in downtown Winnipeg's South Portage Neighbourhood. While unique in that it is the city's first TIF district, the use of public funds to reshape Winnipeg's downtown has a long history dating back to the mid-20th century. This section provides some brief context regarding the history of public intervention and planning in Winnipeg's downtown, and the emergence of the SHED and its creator, CentreVenture. This section also outlines the legislative context for Tax Increment Financing in the SHED, and provides some insight into the public discourse that has surrounded the SHED. Lastly, it touches on the impact of the COVID-19 pandemic given the role this has had both on the economic and social health of Central Business Districts, as this may have an impact both on property values and public perceptions downtown.

### **4.1 Downtown Historical Context**

#### **4.1.1 Decline and Revitalization**

Today Winnipeg's downtown continues to display its history as an industrial boomtown at the outset of the 20th century. While buildings from this era provide downtown much of its physical character, in the 100 years since its heyday the downtown has faced significant challenges. Following the second world war, residents began to leave inner city Winnipeg in favour of the city's growing suburbs (Warkentin & Vachon, 2010). From 1941 to 1966, the population of downtown Winnipeg dropped from 15,567 to 8,706 people, or 44% over the course of 25 years (Warkentin & Vachon, 2010). As investment followed residents to the suburbs, much of downtown's housing and building stock fell into disrepair.

Similar to the rest of North America, the post-war years in Winnipeg saw a wave of urban renewal as policymakers sought to reverse the trend of disinvestment in the city's core. Such endeavours included the establishment of an urban renewal board that oversaw the redevelopment of entire blocks, resulting in the construction of the current City Hall, Manitoba Museum and Planetarium (Saftiuk, 2014). Later in the 20th century, revitalization sought more directly to address poverty in the inner city. Through the Core Area Initiative (CAI), a tripartite funding initiative, well over 100 million dollars

was invested in residential rehabilitation, job creation, and community services (Saftiuk, 2014). While both the phase of urban renewal and the CAI represent significant public investments, both eras have been subject to criticisms for their failure to address the social conditions associated with blight (Saftiuk, 2014), and their preference for funding mega projects rather than addressing quality of life concerns (Toews, 2018).

#### **4.1.2 CentreVenture**

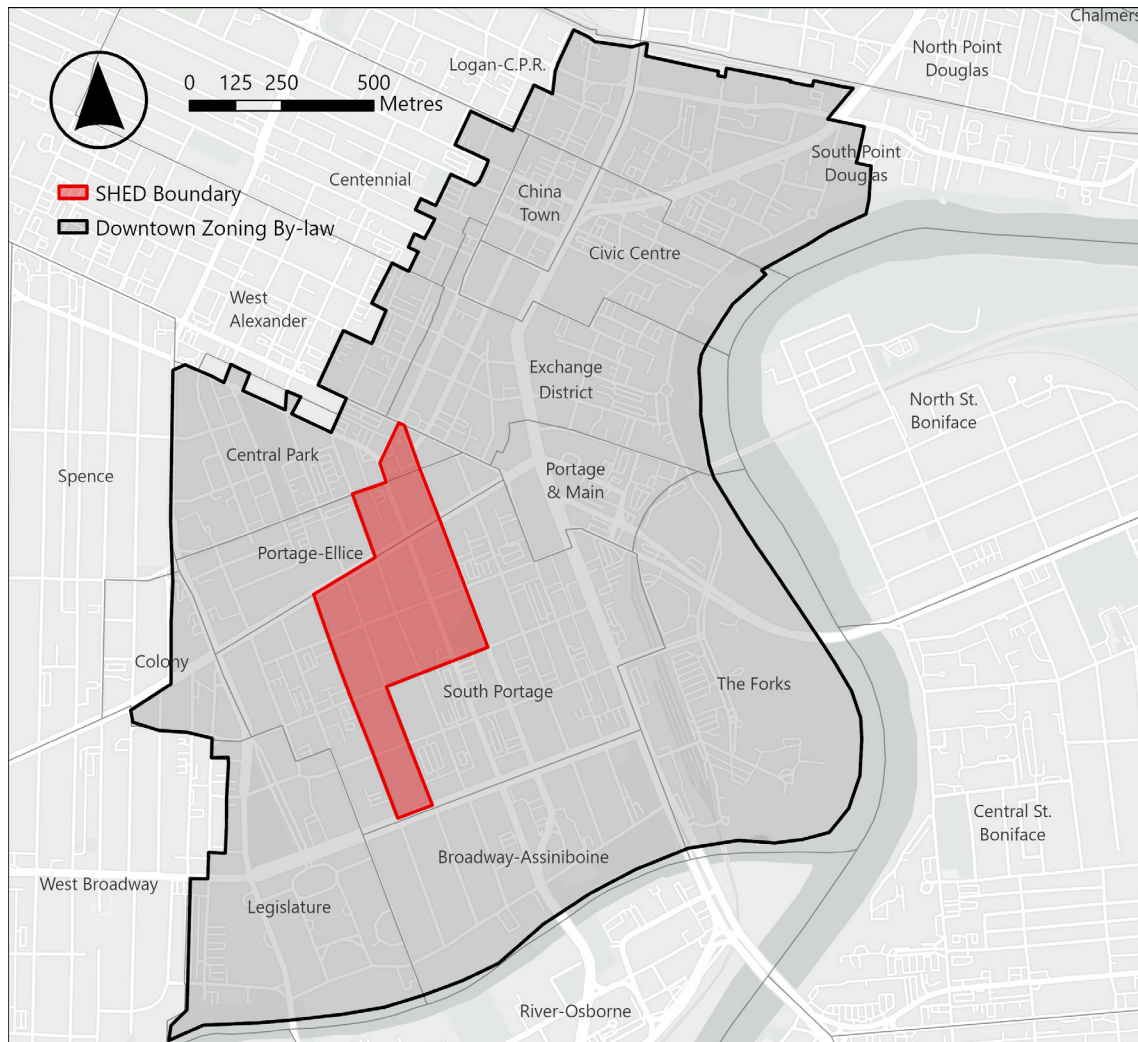
By the 1990s planners and policymakers recognized the need for an updated plan to guide the future development of downtown Winnipeg. In 1994, The City of Winnipeg adopted CentrePlan, the city's new planning policy and development framework for downtown (Saftiuk, 2014). It was the geographical boundaries and the policy direction of CentrePlan that would inform the direction of CentreVenture once established as the downtown development authority in 1999 (City of Winnipeg, 1999a). On May 13 of 1999, Winnipeg's City Council created CentreVenture as:

An arms-length development corporation to revitalize downtown Winnipeg. As the 'single and special entity' mandated to provide leadership in creating and sustaining business opportunities and economic growth within the downtown, CentreVenture is to act in partnership with the City, as a small private authority with public accountability (City of Winnipeg, 1999b).

CentreVenture was created in response to a report that had come a year earlier from Economic Development Winnipeg, which recommended the creation of a downtown Development Authority (City of Winnipeg, 1999a). Since its creation, CentreVenture has played a role in facilitating numerous new developments downtown. An early project of the organization included the redevelopment of Waterfront Drive, which saw 26 historic buildings renovated and approximately 500 new units of housing added to downtown. CentreVenture also played a significant role in attracting the WRHA and United Way offices to North Main Street, and in the 2010s began to turn their attention to Portage Avenue with the release of their Portage Avenue Development Strategy (PADS) in 2010. It was in the PADS

where the Sport, Hospitality, and Entertainment District was first identified as one of downtown’s four distinct Districts and CentreVenture’s next area of focus (Saftiuk, 2014).

## 4.2 Sport, Hospitality and Entertainment District



**Figure 1:** SHED Relative to Downtown Zoning By-law

### 4.2.1 SHED Vision

Shown in Figure 1, the Sport, Hospitality and Entertainment District (SHED) is the 11-block area around Winnipeg’s Canada Life Centre. Envisioned as a focal point for downtown built around the area’s major entertainment venues, the purpose of the SHED as stated by CentreVenture in 2014 was “to create a lively mixed-use district that is defined as much by its entertainment venues and mix of complementary uses as it is by the quality of its public realm” (CentreVenture,

2014, p. 2). CentreVenture outlined its vision for the SHED in a 2014 visioning document that identified 10 key desired outcomes for the district. The document identifies the desire for the creation of complete communities, with the necessary amenities, events, and diverse housing options needed to make the area a desirable place for people to work, live, and visit. Amongst these 10 key objectives is also the desire to create a safe urban environment that is uniquely identifiable as a district and a catalyst for revitalization downtown (CentreVenture, 2014).

#### **4.2.2 New Developments within the SHED**

Early developments after the establishment of the SHED included the expansion of the Convention Centre – intended to attract larger conventions to the city, the redevelopment of the historic Metropolitan Entertainment Centre, and the Centrepont redevelopment at 311 Portage Avenue.

From the outset of the SHED, the True North Square site was identified as the anchor for the district. The 2014 SHED plan identifies this site (formerly called the MPI Plaza) as having “the potential to become the iconic nucleus of the SHED” (CentreVenture, 2014, p.23). As a phased development, True North Square will eventually feature five towers, with only two that are currently complete. The two existing towers, located at 225 Carlton St. and 242 Hargrave St. feature residential and retail space, and a food hall and office space, respectively. The remaining 3 towers for the project (Wawanesa Headquarters and Sutton Place Hotel & Residences) are currently under construction and expected to be completed in early 2024 at a total estimated cost of 750 million dollars (Piché, 2022). Total TIF support for the project won’t be known until the agreement expires after 20 years, however, it is estimated over 45 million dollars in TIF support will be provided from the provincial and municipal level (Lett, 2018).

New residences have also been added both within the SHED and in the surrounding area. These buildings include the construction of 300 Main Street, the Glasshouse Condominiums, the Smith Street Lofts, True North Square, The Medical Arts Conversion, construction of the Avenue Apartments, and the Sterling Building Loft Conversion.

### 4.3 TIF Legislative Context

To finance both the public realm and capital investments deemed necessary to attract development to the SHED, CentreVenture suggested TIF as a financing tool in the 2010 Portage Avenue Development Strategy (CentreVenture, 2010). The SHED area was designated as Winnipeg's first TIF "district" by both the City of Winnipeg and the Province of Manitoba in 2012. CentreVenture was identified as the borrowing agent responsible for \$25 million in TIF funding to be cost-shared equally by the city and the province and spent on supporting the implementation of the PADS and SHED Vision. Areas of investment outlined in a 2012 Executive Policy Committee (EPC) meeting minute detailed the expenditure areas for the SHED. These included streetscaping and public improvements, mall management and security, marketing and promotions, retail recruitment, retention and storefront enhancement, skywalk improvements, land assembly and more (City of Winnipeg, 2012).

The City of Winnipeg has the authority to establish TIF programs or districts under section 222 of the *City of Winnipeg Charter*. This section provides the city with broad authority as to how these funds can be used, allowing them to provide the funds as financial assistance to developers either directly or through a program, for land assembly, capital investment, or any other matter council considers necessary or advisable (The City of Winnipeg Charter, 2002).

The province's authority to establish TIFs comes from the *Community Revitalization Levy and Tax Increment Financing Act*, which was proclaimed in 2009. While called a Community Revitalization Levy, in practice this financing tool operates the same as TIF. Under this act, Manitoba's Lieutenant Governor in council can designate properties as Community Revitalization Properties by regulation if they are satisfied that "(a) significant improvements to the property are to occur;" and "(b) it is in the public interest that the improvements be made" (The Community Revitalization Tax Increment Financing Act, 2009, s. 4[1]). Provincial TIF is collected by the municipality within which a property is located. The rate is equivalent to the school taxes that would be owed on the property; however, the Community Revitalization Levy is collected in lieu of the school taxes by

the municipality. The Minister then has the power to make grants that draw from this levy either to property owners or the municipality for projects that promote revitalization or encourage economic, social, or cultural developments, or the preservation of heritage properties (The Community Revitalization Tax Increment Financing Act, 2009).

In 2018 the province amended its TIF program to make the process to be more “clear” and “transparent” (Kives, 2018b). These changes reduced the risk to taxpayers by only paying out to developers once incremental taxes have been received and included the following new eligibility requirements:

- The proponent company makes a minimum capital investment of \$10M to a specific property;
- A minimum of 65% of total project costs are from private sources; and
- There is demonstrable potential to create and/or maintain a minimum of 10 jobs in the province or the new business activity has a substantial and measurable net economic benefit to the province (Province of Manitoba, n.d.-a).

These changes do not affect the City of Winnipeg’s ability to implement rebates on the municipal portion of the tax bill. Neither legislation includes a threshold that would indicate what constitutes significant improvements or public interest.

#### **4.4 Critical Reception**

As new developments were announced in the SHED, they were praised widely by Winnipeg’s business community and political leaders for what they signified in the revitalization of Portage Avenue and downtown as a whole. Speaking on Centrepont, the former CEO of CentureVenture described the development as “an enormous deal for downtown” (Cash, 2011), and a catalyst for things to come in the SHED. Four years after the announcement of the Centrepont development, the SHED’s flagship development at True North Square was first revealed. Throughout media reports and in addresses by politicians, True North Square has been frequently heralded as the harbinger of a bright future for downtown. Speaking at the building’s opening in 2018, former premier Brian Pallister said “Today we celebrate an investment in the future of this heart [Winnipeg]. Today our hearts

beat more loudly and with more pride, perhaps, than they did yesterday” (Thorpe, 2018). True North Square has also received positive attention in the design community, being awarded the National Urban Design award for urban architecture in 2022, in part due to it taking into account the physical climate – designed to protect from harsh winter winds in the plaza (Piché, 2022).

Despite a positive reception across much of the media, True North Square and the SHED have also been subject to criticism by community activists and those concerned with the extent to which public funds through TIF have been used to support private development. In *Stolen City: Racial Capitalism and the Making of Winnipeg*, Toews (2018) argues the development vision pursued by CentreVenture was largely built on the removal of Indigenous spaces along Portage Avenue. As a part of the PADS, CentreVenture proposed the adoption of a mall management strategy for Portage Avenue, in an attempt to “provide for visitor expectations and social responsibilities similar to what one would experience at a regional shopping centre” (CentreVenture, 2010). In the early days of the SHED, two steps CentreVenture took towards this end were the purchase of the St. Regis Hotel and the Carlton Inn. Both hotels were purchased by CentreVenture because the bars they housed were believed to be a source of disorderly behaviour in the neighbourhood and therefore were seen to pose a threat to the sort of investment CentreVenture was hoping to attract to the SHED (Toews, 2018). Both hotels however had also primarily housed First Nations families who were visiting the city for medical care (CBC News, 2012). Despite the loss of more than 200 units of affordable housing that these demolitions meant, no relocation plan was offered to residents due to the units being short- to medium-term housing (Toews, 2018).

True North Square has also been subject to scrutiny due to the amount of TIF subsidies it received. With public support topping \$45 million for the development, controversy ensued when the developers asked to be exempt from a city by-law that would have required 10% of housing units to be rented at an “affordable” rent (median market rent) for a minimum of

5 years (MacKinnon, 2018). Due to the backlash in the media, a requirement that True North pay the city an affordable housing grant of approximately \$200,000 was negotiated (Kives, 2018a). There have also been questions raised regarding the TIF that supported the creation of True North Square's Public Plaza, with \$17.6 million of the project's TIF funds having been committed to the creation of the plaza (CBC News, 2018). This move was seen as controversial, as the plaza is a privately owned public space. While the square can be used to offer public programming, private ownership means people's access to the space can be controlled in a manner different from other areas of the public realm (CBC News, 2016a).

#### **4.5 Impacts of the Pandemic on Downtown**

Also relevant to both of this project's research questions is the impact the COVID-19 pandemic has had on central business districts around the world as people have shifted to working from home. Winnipeg has long struggled to develop a substantial residential population that can support downtown businesses, and the loss of workers travelling to the area every day has had an enormous impact on business and foot traffic. Estimates from the Downtown BIZ suggested anywhere from 70,000 – 80,000 workers and students in the City Centre stopped coming downtown at the onset of the pandemic (Kavanagh, 2021). This loss in commuters had a devastating impact on downtown's business community, with 47 of approximately 400 downtown storefronts having shut down within the first year of the pandemic (Samson, 2021). While more recently things are improving, with the Downtown BIZ reporting that 64% of downtown workers are back in the office full-time (Downtown Winnipeg BIZ, 2022), the pandemic has had a lasting impact on the labour market as more people work from home either part- or full-time. This trend is something that all cities will contend with in the coming years but is likely particularly relevant in commuter downtowns such as Winnipeg where businesses have long relied on office workers to maintain their bottom line.

Public perceptions of safety are a challenge for downtown Winnipeg that was amplified through the pandemic. The pandemic brought long-standing social inequalities to the forefront, as the economic crisis hurt many who were already struggling. As safe indoor spaces shut their doors,



those who depended upon them were forced into the public realm. Despite public perceptions, during the first year of the pandemic, reported crime dropped 31% downtown, indicating that stigma around homelessness, mental health and substance use may be impacting people's perceptions of safety in the area (Downtown Winnipeg BIZ, 2021). Most recent data suggests however that crime may now be growing in the area (Winnipeg Police Service, 2023). As prices for essential goods and housing are on the rise, this can be expected to pose a significant challenge to downtown and the broader Centennial area where the highest rates of poverty, highest housing need, and lowest quality of housing in the city are concentrated (Abas, 2022).

#### **4.6 Summary**

The use of TIF represents a recent venture in a long history of public intervention in shaping the development of downtown Winnipeg. While the SHED has seen significant new developments over the past ten years and has been praised by many for its economic impact, it has also faced criticism. Like other jurisdictions, the SHED has been scrutinized for the amount of public funding that has supported private developments. TIF legislation in Manitoba does not define what constitutes significant improvements or public benefit, which leads to the focus of this research project. As identified in the literature review, TIF should be considered both in terms of the impact it has on property values, as well as on the quality of life for residents. Findings from the property value analysis and resident survey are discussed in the following section.

## 5. Findings

### 5.1 Property Value Analysis Findings

This section provides an overview of findings from the property value analysis. The property value analysis was included given the central importance of property value growth to the use of Tax Increment Financing and was conducted by comparing changes in assessment values before the establishment of the SHED and following the establishment of the SHED. This part of the research intended to begin exploring the “but for” question that is central to TIF literature, and whether property value growth in the SHED would have happened in the absence of the TIF designation.

#### 5.1.1 2009 – 2012

To understand how property values were growing downtown before the designation of the SHED TIF district, I calculated the rate of growth for the total assessed value of all parcels within the downtown zoning by-law from 2009 to 2012. As shown in Figure 2, the total increase was \$1,252,221,148 over the course of the three years, which comes to an average increase of \$417,407,049.33 per year. Over the three years, this represents an 83.5% growth in property values across the downtown zoning by-law.

<b>Figure 2: Property Value Change within the Downtown Zoning by-law, 2009 - 2012</b>	
Total Assessed Value, 2009	\$1,500,023,699
Total Assessed Value, 2012	\$2,752,244,847
Total increase	\$1,252,221,148
% Increase	83.5%

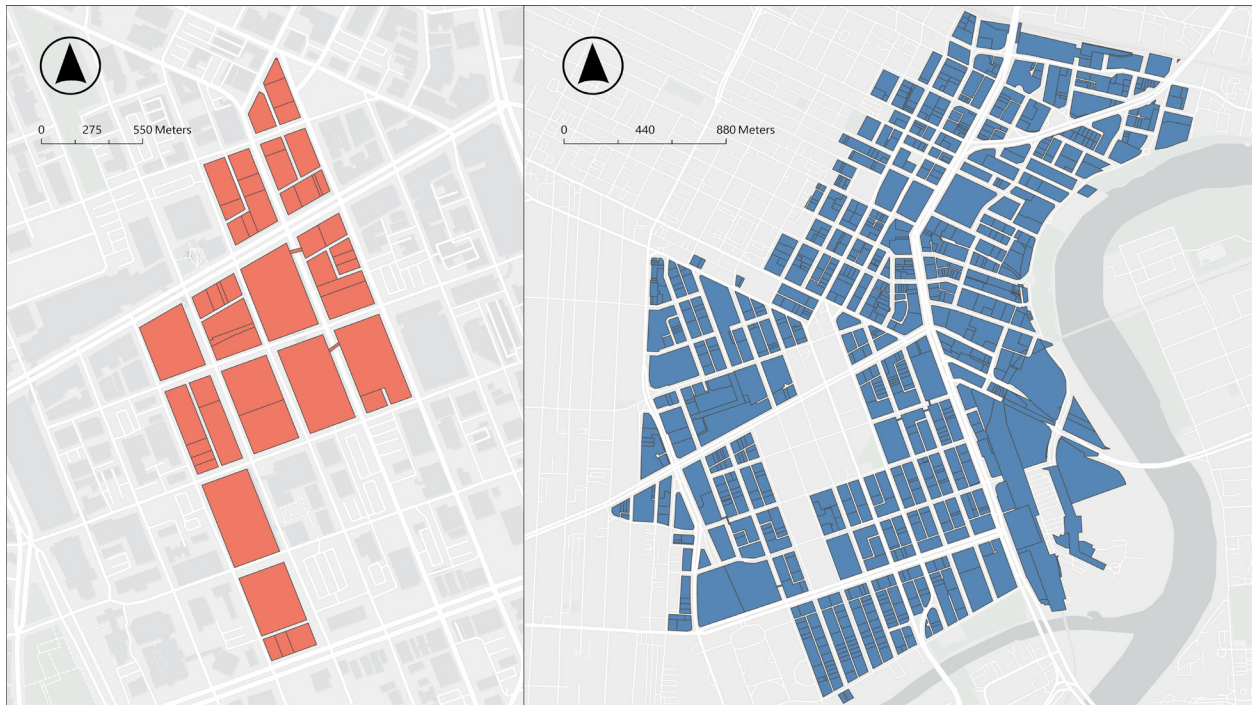
### 5.1.2 2012 – 2021

I then calculated the rate of property value growth within the downtown zoning-by-law from 2012, the year the SHED TIF district was established, to the most recent property value data available through the City of Winnipeg’s open data portal which is from April of 2021. Over the course of these nine years, property values grew by a total of \$2,634,053,006 as shown in Figure 3. This represents an average growth of \$292,672,556.22 per year and a total change of 95.7% over the nine years. This average yearly increase is lower than the amount measured in the three years before the establishment of the SHED TIF district.

<b>Figure 3: Property Value Change within the Downtown Zoning by-law, 2012 - 2021</b>	
Total Assessed Value, 2012	\$2,752,244,847
Total Assessed Value, 2021	\$5,386,297,853
Total increase	\$2,634,053,006
% Increase	95.7%

### 5.1.3 Exploring Change within the SHED Relative to the Rest of Downtown

As shown in Figures 5 and 6, I also calculated the growth in property values within the SHED relative to the rest of downtown from 2012-2021. Figure 4 shows a comparison of the SHED and non-SHED parcels. As shown in Figure 5, property values within the SHED increased by 253.4% between 2012-2021, while those outside of the SHED (Figure 6) grew by 77% over the same time. This indicates the growth in property values downtown between 2012 – 2021 was driven in large part by the large increases in value being seen within the SHED. Despite property values in the SHED more than doubling over the course of these nine years, the per-year growth from the base growth rate period of 2009 – 2012 remains higher than for 2012 – 2021.

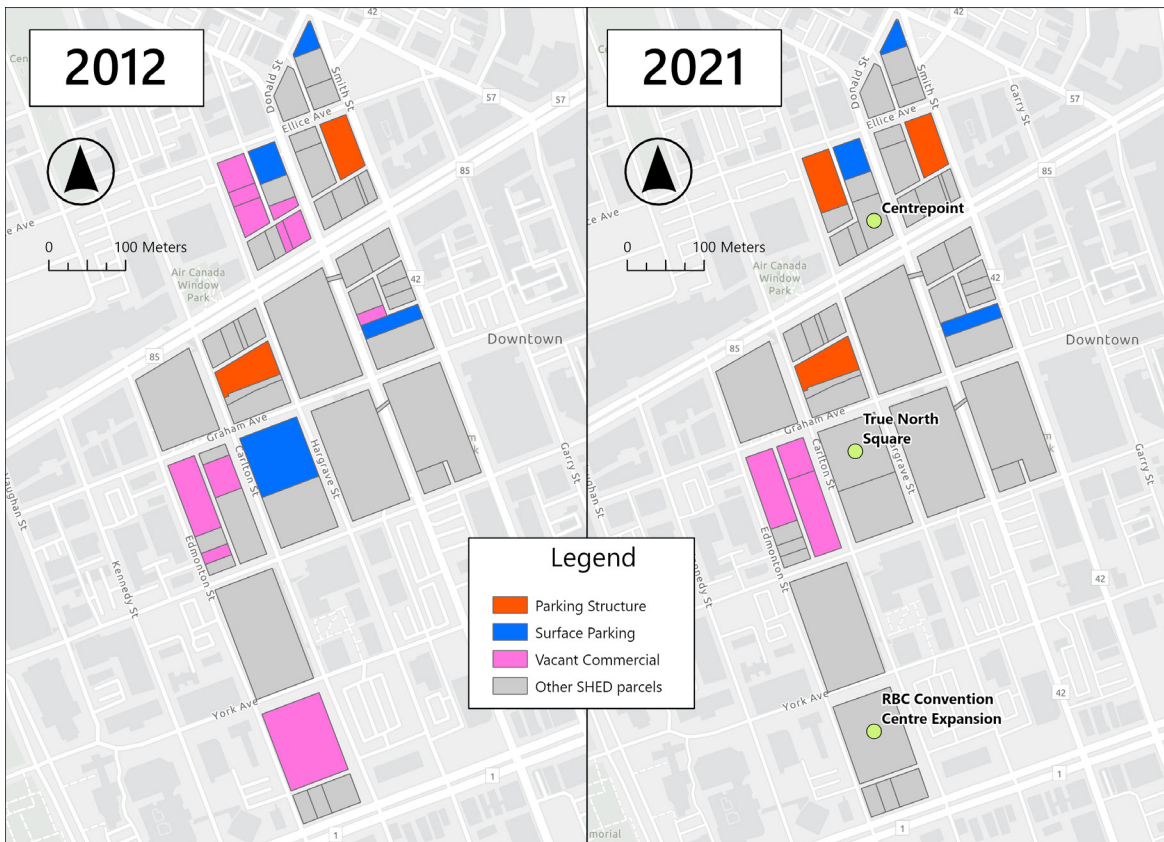


**Figure 4: SHED & Downtown Zoning By-law Parcels, 2021**

<b>Figure 5: Property Value Change, SHED 2012 – 2021</b>	
Total Assessed Value, 2012	\$280,456,602
Total Assessed Value, 2021	\$991,120,950
Total increase	\$710,664,348
% Increase	253.4%

<b>Figure 6: Property Value Change, Downtown ZBL excluding the SHED, 2012 - 2021</b>	
Total Assessed Value, 2012	\$2,471,788,245
Total Assessed Value, 2021	\$4,374,956,903
Total increase	\$1,903,168,658
% Increase	77%

It is also worth noting what new developments in the SHED were replacing. As shown in Figure 7, there was more vacant commercial property in the SHED in 2012, and a surface parking lot on the site of True North Square. The Convention Centre Expansion, True North Square, and Centrepoint developments all took place on sites that were formerly lower-value land uses. These changes contributed significantly to property value appreciation within the SHED. As shown below in Figure 8, \$330,374,000 of the SHED's property value growth came from the replacement of surface parking and low-value vacant commercial structures.



**Figure 7:** Changes in Primary Use Category, SHED 2012-2021

<b>Figure 8: Property Value Change, Key SHED Locations 2012-2021</b>			
Centrepoint	\$1,370,000	\$32,338,000	\$30,968,000
True North Square	\$3,360,000	\$212,349,000	\$208,989,000
RBC Convention Centre	\$4,280,000	\$94,697,000	\$90,417,000
<b>Total Change</b>	<b>\$330,374,000</b>		

#### **5.1.4 Summary of Property Value Findings**

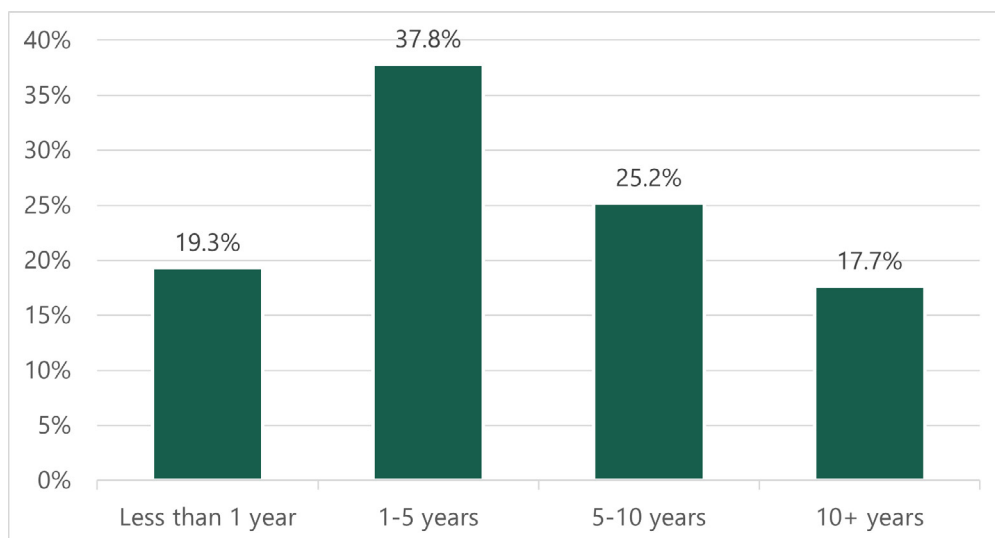
This research found property value growth in the SHED outpaced the rate of growth for the rest of downtown from 2012 to 2021. Despite this, the overall rate of property value appreciation downtown did not outpace the growth seen downtown from 2009 to 2012. The implications of these findings are discussed further in the Discussion in Section 6.

## 5.2 Survey Findings

This section provides an overview of key findings from the downtown resident survey. Survey questions focused primarily on two different aspects of people’s experiences as a resident downtown. The first few survey questions focused on more factual aspects of people’s experiences. These multiple-choice questions asked how long respondents had been living downtown and the locations within the SHED where they spend time. The remainder of the survey focused on residents’ sentiments towards their community and the SHED more broadly. These questions were a mix of both multiple-choice and open-ended questions. They asked about people’s satisfaction with different aspects of their community, whether they felt the community has changed, and whether new development has had a positive or negative impact on their community. A final open-ended survey question asked if there was anything else the respondent wanted to share to allow people to expand on thoughts that were not captured within the other survey questions.

### 5.2.1 How Long had Respondents Lived Downtown?

As shown in Figure 9, of the 119 respondents who answered the question “How long have you lived downtown?” , 37.8% of respondents had lived downtown for between 1-5 years, and 42.9% had lived within the survey eligibility area for more than 5 years.



**Figure 9:** How Long had Respondents Lived Downtown?

### 5.2.2 Where do Residents Spend Time in the SHED?

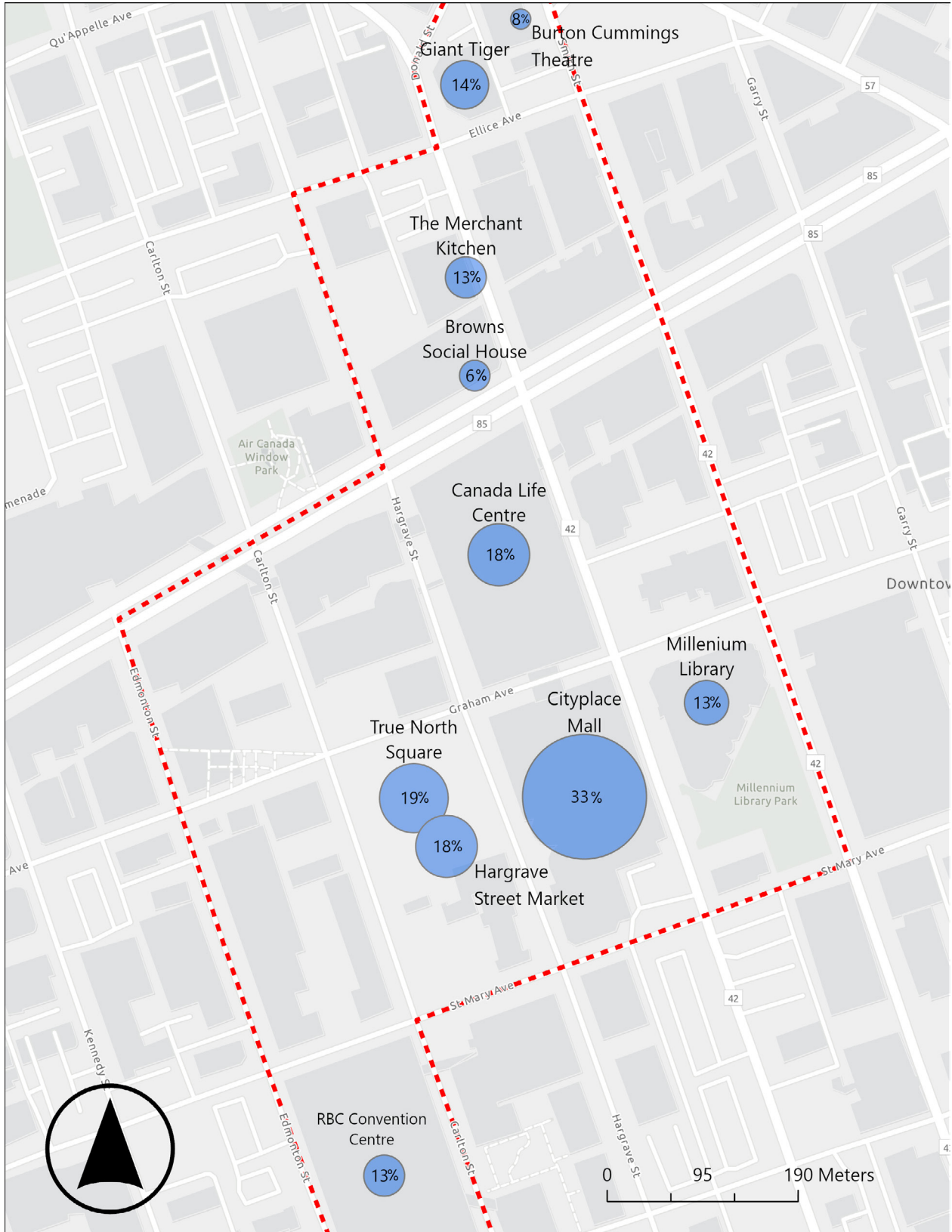
Two questions focused on locations within the SHED and the frequency with which people visited them. The first question provided a list of ten SHED locations and asked *“Do you spend time at any of the following locations? How often do you visit them?”* with respondents indicating whether they spend time at the locations weekly (1+ times per week), regularly (1+ times per month) or occasionally (once every few months). Respondents were also able to leave the space blank, with non-answers being interpreted as a place that they do not visit.

Of the ten locations respondents were asked about, the most frequently visited on a weekly basis was City Place Mall, with 32.5% of respondents indicating they spend time at City Place Mall weekly. The second most frequented location was True North Square Plaza, with 19.2% of respondents indicating they visit the plaza weekly. This question distinguished between True North Square Plaza and Hargrave Street Market, the indoor food court at True North Square. 17.5% of respondents noted they visited Hargrave Street market every week, tying it for the third most visited place along with the Canada Life Centre. Figure 10 illustrates the number of respondents who indicated visiting a location on a weekly basis.

It should be noted the question did not inquire about the amount of time that respondents spend in the locations. This may have led some respondents to interpret the question as including places they pass by on their commutes, and led people to indicate they spend time at locations they pass by either outdoors or in the skywalk system as locations they spend time at weekly.

A follow-up open-ended question asked respondents: *“Are there any other locations within the SHED (area within the red dotted boundary shown in the image) that you spend time at? How often do you visit them?”* Responses primarily indicated other restaurants and shops that people frequented. Three respondents identified Motolla Grocery, the new specialty grocery store in True North Square as a location they visit either weekly or regularly. Respondents also indicated the Glasshouse Condos and True North Square as locations they visit daily due to living there.





**Figure 10:** Number of respondents who visit the location weekly

## **5.2.3 What are residents' attitudes about their Community and the SHED?**

### **5.2.3.1 Satisfaction with aspects of the community**

Question 7 in the survey asked respondents to rank their satisfaction with various aspects of their community, to understand areas where improvement could be made and how satisfaction may have been affected by new developments. Respondents were asked, "How would you rate your satisfaction with the following aspects of your community?" and were given the option to choose whether they were Very Satisfied, Satisfied, Neutral, Unsatisfied, or Very Unsatisfied with 12 different aspects of the community. The categories asked about were Parking, Sidewalks, Bike Infrastructure, Access to Transit, Housing Quality, Housing Affordability, Access to Essential Services (e.g., Healthcare, groceries), Access to Restaurants and Shops, Recreation Opportunities, Culture/Events, Public Spaces and Safety.

Across all 12 categories, responses indicating satisfaction outweighed responses indicating dissatisfaction. The three categories respondents felt most positively about were:

- **Culture/Events** – 66.1% satisfied or very satisfied
- **Access to Transit** – 58.4% satisfied or very satisfied
- **Access to Restaurants/Shops** – 68.1% satisfied or very satisfied

The three categories where respondents indicated the greatest levels of dissatisfaction were:

- **Safety** – 41.1% were unsatisfied or very unsatisfied
- **Housing Affordability** – 30.4% were unsatisfied or very unsatisfied
- **Access to Essential Services (grocery, healthcare, etc.)** – 29.5% were unsatisfied or very unsatisfied

A table containing the complete results can be found in Appendix E.

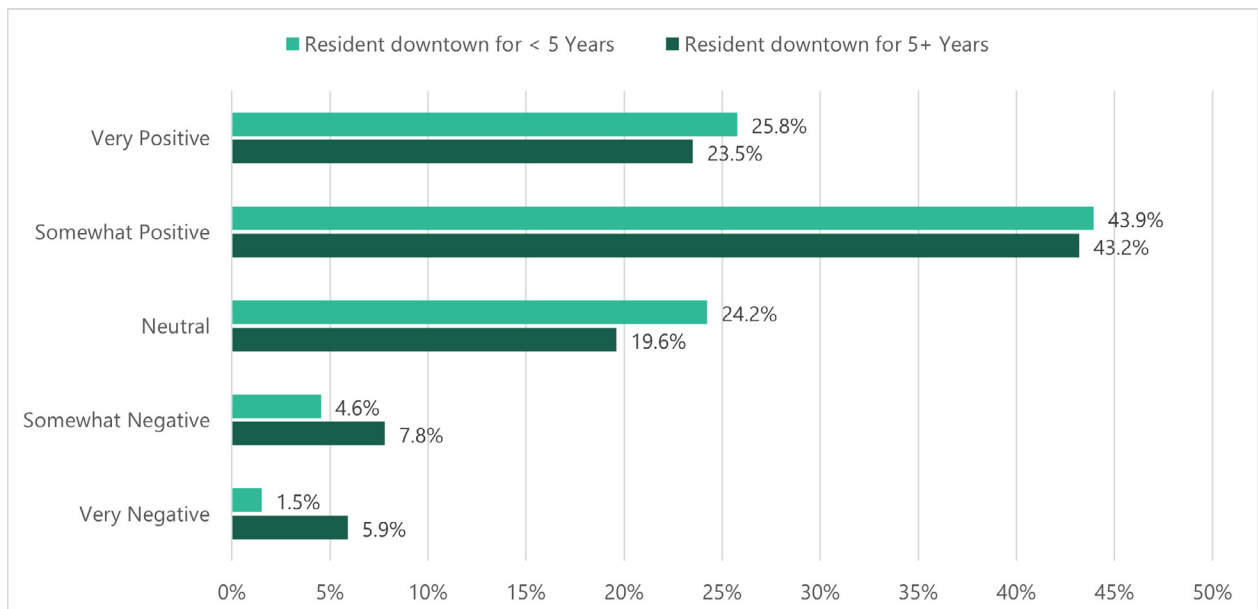
### 5.2.3.2 Feelings towards the SHED area

Consistently throughout the survey, respondents indicated a mostly positive perception of the SHED area. Question 4 asked “On a scale of 1 to 5, with 5 being positive, how would you rate your feelings about spending time in the SHED?” respondents gave an average rating of 3.58/5. This positive attitude was consistent in question 5 when asked “Overall, what do you feel that the impact of new developments around the Canada Life Centre has been on your community?”, with 67.5% of respondents indicating they felt the impact had been somewhat positive or very positive. Only 10% of respondents felt the developments had a very negative or somewhat negative effect, and 22.5% of respondents responded as “neutral”.

I also filtered responses to questions 4 and 5 based on responses to question 1, which asked how long residents had lived within the eligibility boundary, to understand whether newer residents felt more positively towards the SHED than longer-term residents. I found newer residents tended to have a slightly more positive perception of the SHED relative to long-term residents. Residents who had lived within the eligibility boundary for 5 or more years gave the SHED an average rating of 3.44, as opposed to residents of less than 5 years who gave the SHED an average rating of 3.66.

This pattern was also demonstrated in question 5 when comparing what residents felt the impact of new developments had been on the community. As shown in Figure 11, I found that longer-term residents (5+ years) were slightly more likely to indicate new development around the Canada Life Centre had had a “somewhat negative” or “very negative” impact on their community than residents who had lived in the community for less than 5 years.

Responses also indicated many residents have noticed investments in streetscaping in the area around the Canada Life Centre. When asked “Overall, do you notice a difference in the quality of streetscaping within the SHED area indicated in the image by the red dotted boundary? (e.g., Improvements to lighting, public art, improved sidewalks, benches, storefront improvements, etc.)”, 44.2% of respondents indicated that they felt streetscaping in the SHED area has somewhat improved, and 22.5% indicated they felt streetscaping has greatly improved.



**Figure 11:** Attitudes to New Development by Length of Time Living Downtown

### 5.2.3.3 New Development and Community Change

The survey also included three open-ended questions to allow respondents to expand in their own words on changes they had noticed in their community. Some respondents indicated only if they felt positively or negatively in response to the question, while others responded to the prompt and elaborated on why they felt that way. Responses that elaborated on the reasons for their attitudes were coded thematically using eight major themes identified through inductive coding. Comments that did not fit well in the thematic areas were coded as “Other”. The responses people gave are considered by thematic area in the next section.

To further understand the positive or negative changes residents associated with new development in the SHED, question 9 of the survey asked:

*“Could you share some details of the positive or negative impacts you feel that new development around the Canada Life Centre has had on your community?”*

In the 47 responses to this open-ended question:

- 70.2% of the responses noted positive impacts new development had on their community
- 38.3% of the responses noted negative impacts new development had on their community
- 12.8% of the respondents felt new development had no impact on their community

Responses to question nine were also coded thematically to identify the positive and negative impacts people felt new development has had. The themes identified in response to question 9 are shown below in figure 12.

<b>Figure 12: Positive and Negative Impacts of New Development</b>		
<b>Themes from Q9</b>	<b>Positive Responses</b>	<b>Negative Responses</b>
Safety	5	5
Bringing People Downtown	11	4
Affordability/Gentrification	0	7
Amenities & Events	11	5
Streetscaping	11	0
Transportation	5	6
COVID-19	0	1
Systemic Social Challenges	0	5
Other	2	6

Question 8 was open-ended and asked more broadly how residents felt their community had changed over the past ten years. It asked:

*“Do you feel that the community has changed over the past ten years? If yes, how, and has the change been positive or negative?”*

In the 70 responses to this open-ended question:

- 58.6% of responses identified positive changes within their community
- 47.1% of responses identified negative changes within their community
- 11.4% of responses stated the community had not changed over the past ten years

Responses to question eight were also coded thematically to understand the types of changes people had noticed. The themes identified in response to question 8 are shown below in figure 13.

<b>Figure 13: Positive and Negative Community Change</b>		
<b>Themes from Q8</b>	<b>Positive Responses</b>	<b>Negative Responses</b>
Safety	0	13
Bringing People Downtown	7	5
Affordability/Gentrification	0	5
Amenities & Events	4	9
Streetscaping	7	3
Transportation	2	1
COVID-19	0	6
Systemic Social Challenges	0	14
Other	1	1

Question 10, the survey’s final open-ended question asked respondents:

“Is there anything else you’d like to share?”

This question was included to allow respondents to identify any opinions that had not been addressed in the previous questions and received 27 responses. The themes identified in response to question ten are shown in figure 14.

<b>Figure 14: Final thoughts people shared</b>		
<b>Themes from Q8</b>	<b>Positive Responses</b>	<b>Negative Responses</b>
Safety	2	8
Bringing People Downtown	0	5
Affordability/Gentrification	0	3
Amenities & Events	1	7
Streetscaping	0	1
Transportation	1	2
COVID-19	0	1
Systemic Social Challenges	0	1
Other	0	3

#### 5.2.3.4 Exploring what people said

The following section explores the themes identified across the three open-ended questions.

##### *Declining Feelings of Safety*

The topic of safety was a prominent theme mentioned throughout the open-ended questions, as well as the area where respondents indicated the highest level of dissatisfaction in question 7 (41.1% unsatisfied or very unsatisfied). When asked whether the community had changed over the past ten years and whether this change had been positive or negative, 13 respondents (18.6%) mentioned changes to safety, with all of these comments stating they felt safety downtown had declined over the past ten years. The theme of safety was closely related to other thematic areas, specifically systemic social challenges, and bringing people downtown. Seven of the 13 respondents who mentioned a decline in feelings of safety identified this was a result of systemic social challenges, citing increases in visible poverty, panhandling, homelessness, drug use, and mental health crises as reasons for feeling unsafe. Responses also discussed increases in crime and highlighted a relationship between foot traffic and feelings of safety. One respondent noted that:

*“This area of the city has seemed to decline in safety, especially with more people working remotely there is less foot traffic during the day. On weekends and in the evenings I will not spend time in this area alone, even to walk my dogs.”*

This comment indicates that for some, safety concerns pose a barrier to experiencing aspects of their neighbourhood. This sentiment was echoed by another respondent who indicated safety concerns kept them from accessing the amenities available to them downtown as much as they would like.

Safety was the primary theme noted in the final survey question which asked if respondents had anything else they wished to share. Of the 27 people that chose to share additional thoughts, safety was mentioned by ten respondents. Six of these respondents noted feeling unsafe in the SHED



area or expressed hope for increased security downtown. Three others however noted concern with how public perceptions will continue to affect downtown. One respondent noted their concern that issues of crime and homelessness may negatively impact the demand for housing that's being built downtown. Another stated:

*"..my hope for the neighbourhood is that the public's perception of it improves. Most people (i.e., those who live in the suburbs) believe it to be horribly unsafe, which is untrue. The only way to remove that perception is to develop a community that people don't flee come 5 pm. It is headed in the right direction, but there is still much work to be done."*

These responses indicated many residents' perceptions of safety downtown have declined over the past ten years. Despite this, others did not feel safety had changed and expressed concern about how characterizations of the area as "unsafe" will affect its future success.

### ***Attracting More People to Downtown***

When asked about neighbourhood change and the impacts of new development, many respondents highlighted that new development has led to changes in the number of people coming downtown. More people coming downtown was one of the three most positive impacts that were identified when people were asked about the impacts of new development around the Canada Life Centre in question nine. Responses to this question indicated it is viewed as positive that new developments are bringing more visitors, residents, and customers downtown. Three people noted the increased foot traffic resulting from new developments is good for safety, with one respondent stating:

*"A lot more people come to the area now for social activities, which is positive as there is safety in numbers."*

While the majority of responses to questions eight and nine indicated that increases in people coming downtown has been a positive change over the past ten years, several comments noted a concern that increases in visitors

to downtown are largely built around events rather than sustained foot traffic. One respondent stated:

*“Recent development is arguably furthering a pattern of stopover destination sites around the MTS Centre (fine, Canada Life!). People may come for a Jets game, dinner at Hargrave, a concert at the Burt, etc. - but then they leave. The streets are often empty by 5:00 PM.”*

Concerns about creating a concentration of stopover destinations were noted by four people in response to question nine. Disruptions such as noise, and trouble finding parking during Jets Game nights were also noted by two respondents.

### ***Declining Affordability and Gentrification Concerns***

While not a prominent theme, concerns regarding declining housing affordability and gentrification emerged in the three open-ended questions. Concerns about housing costs specifically were mentioned by nine different respondents (7.5% of total respondents). When asked about neighbourhood change, one respondent stated they can no longer afford the apartment they have lived in for 12 years. Two respondents also noted rents have been rising over the past ten years despite a lack of maintenance to the housing stock, leading to a lack of adequate housing downtown.

Four respondents connected their concerns about affordability and gentrification to the new developments around the Canada Life Centre. One respondent stated that they believe the new developments are gentrifying the area and pushing out people who were struggling to afford living downtown as rental costs rise. Five respondents also noted feeling that the benefits these new developments have brought have not been to the benefit of residents downtown and that there has been a lack of investment in the community by the developers and owners of these projects. It was also noted by two people that they hope to see more development to the benefit of lower-income residents. Particularly relevant to this research project was a comment made by one respondent that stated:

*“If developers are receiving incentives (tax breaks etc) to build, their plans should be required to include meaningful contributions to the community that exists downtown. That community includes people of all social economic backgrounds.”*

In response to the final open-ended question, one respondent indicated their concern existing residents have not been considered in revitalization plans, stating:

*“Any plans for revitalization or development must consider the people who live and exist downtown.”*

### ***Importance of Neighbourhood Amenities***

Changes to amenities were one of the top three themes mentioned across the three open-ended questions. While responses to question nine identified that new developments around the Canada Life Centre have had a positive impact on the availability of events and amenities, responses to question eight identified that while people are satisfied with the availability of restaurants and bars in the area, other important community amenities are lacking. This finding makes sense in relation to the responses to question seven which found residents ranked high satisfaction with the culture and events, restaurants, and shops in their neighbourhood, but were less satisfied with the accessibility of essential amenities such as healthcare and groceries.

Of the 13 respondents that mentioned amenities in relation to neighbourhood change, nine noted negative changes in the availability of amenities downtown. While residents noted a wide variety of negative changes to amenities, the most mentioned change was a lack of shops that remain open past office hours for people who live downtown. Other specific negative changes to amenities residents noted included growth in abandoned storefronts in recent years, lack of a full-service grocery store, loss of a mainstream theatre downtown, and the high cost of the new amenities in True North Square. One respondent also noted the liquor store being moved from City Place to True North Square has made it less accessible.

Amenities was the second most mentioned theme in the final open-ended question and was mentioned by eight respondents. Of these eight respondents, four highlighted the need for a major grocery chain in the downtown core, something that was also noted in the previous open-ended questions by multiple respondents. One respondent noted they drive to Superstore for most of their groceries due to the higher cost and more limited selection available at the local Family Foods.

One interesting suggestion provided in this section that was not noted elsewhere was by two respondents who noted the SHED area would benefit from increased green space, parks, or public spaces. Lastly, one respondent noted the importance of Portage Place Mall to the downtown community. They said:

*“Portage Place has so much potential as a community space. It is already a meeting place for so many people. While at the moment a lot of people say it’s unsafe and full of shady characters (that is true sometimes) there are also a lot of people who greatly benefit from that space for socializing and community connection.”*

### ***Streetscaping Improvements***

Generally, respondents noted a positive change to streetscaping in the area around the Canada Life Centre. Specific changes that were noted included improved lighting, the installation of public art near the Millennium Library, more places to rest, and better snow clearing relative to other parts of downtown. One respondent did note there had been slow improvements to streetscaping in the area, but that since the pandemic they have noticed the area becoming more run down, and more closed storefronts.

### ***Mixed Transportation Opinions***

Several respondents mentioned transportation in relation to neighbourhood change and in relation to new developments around the Canada Life Centre. Some of these responses were conflicting, with people noting both improvements and deterioration in transit quality. Other responses related to transportation focused on transit safety and noted safety concerns had increased with people living in bus shelters or reported changing

their bus routes in response to safety concerns at specific bus stops. Four respondents noted the challenges that frequent construction was having on their ability to navigate sidewalks and roadways downtown. Three of the 27 responses to the final open-ended question chose to note their dissatisfaction with the quality of cycling infrastructure in the city core and the SHED specifically.

*“The core of the city feels a bit cut off from the rest of Winnipeg. I’d like to see AT considerations for getting out toward the airport, or further down Portage Ave, or crossing the Red and Assiniboine.”*

*“Infrastructure continues to be a major concern. There is a lack of quality bicycle and pedestrian infrastructure in the area that would probably make it more attractive for residents.”*

*“Poor bike infrastructure is still a major barrier for me going fully car-free. TNS has added lots of good quality bike parking, but the city needs to do its part by adding protected bike lanes, adding public bike stands, and prioritizing clearing snow for modes other than motor traffic.”*

### ***Negative impacts of COVID-19***

COVID-19 was mentioned less than expected throughout the open-ended questions, with only eight responses directly mentioning the pandemic. Of the comments that mentioned the pandemic, all were negative, with several noting the pandemic had interrupted what had previously been positive changes to downtown.

### ***Growth in Systemic Social Issues***

Fourteen comments noted negative community changes related to various systemic social challenges. Of the challenges noted, comments cited increases in poverty, visible homelessness, drug use, and mental health challenges as changes over the past ten years. A perception of declining safety was noted in relation to these social issues by seven respondents.

In response to question nine which asked about positive or negative

impacts resulting from new development around the Canada Life Centre, five people noted the visibility of systemic social issues. Specifically, respondents noted the prominence of visible homelessness in the area. Of those that mentioned systemic social issues in response to this question, four related this to the inability of private development to solve or push away these sorts of challenges and identified the need for investment in the community to address the challenges being faced in the area.

### ***Other Responses***

Responses that didn't fit within the 7 primary themes were coded as "other". One interesting theme mentioned in these responses was people's public perceptions of downtown. When discussing neighbourhood change, one respondent noted they felt there had been little change, but that negative attitudes about visiting downtown relate largely to being uncomfortable with seeing the visible manifestations of poverty. Public perception was also noted as an important positive benefit that had improved with new development around the Canada Life Centre by two respondents. One noted new developments brought positive news coverage to the area, while another stated that visible new development provides the impression of a city that is growing and thriving.

### **5.2.4 Summary of Survey Findings**

Results from the survey indicated that overall, residents feel positively towards the SHED and are satisfied with many aspects of their community. The addition of new restaurants, shops, events, and improvements to streetscaping were all positively associated with the SHED. Despite mostly positive findings, the survey also identified that there are areas residents are dissatisfied with that warrant attention from policymakers. A lack of essential amenities such as a full-service grocery store presents a serious challenge for residents living downtown. Rising housing costs and concerns around safety were also highlighted as significant concerns for many residents.

## **6. Discussion**

### **6.1 Property Value Discussion**

#### **6.1.1 SHED Performance**

This research explored the changes to property values in downtown Winnipeg that have occurred since the SHED was established as a TIF district in 2012. I found that from 2012 – 2021, property value growth in the SHED far outpaced that which happened in the rest of downtown throughout this time, with property values growing 2.3 times more quickly than all other parcels within the downtown zoning by-law boundary. Despite this growth, however, the overall rate of property value growth per year downtown was slower than it was in the 3 years before the establishment of the SHED. There are several possible reasons for this. The years 2009-2012 also saw significant downtown investments. This includes the revitalization of Central Park (Bernhardt, 2019), condo conversions, and several large-scale redevelopments along Main Street driven by CentreVenture. In a report discussing development trends in downtown between 2005-2013, the authors stated “From this wider perspective, developments between 2005 and 2013 have been more significant than many may imagine, perhaps becoming one of Winnipeg’s most significant periods of development” (Distasio & McCullough, 2013, p.3).

It is also interesting to consider the SHED’s performance in relation to TIF districts in other jurisdictions. In their study of how 134 TIF districts in Chicago performed from 2009 – 2013, Blackmond Larnell & Downey (2019) found that the districts they studied were an average size of 1.64 km<sup>2</sup> and experienced a mean increase of 300% in property values during the four-year study period. Thus, at only 0.21 km<sup>2</sup>, the SHED is relatively small when compared to other TIF districts. Size may in part have contributed to the growth rate in the SHED which was lower than the mean in Blackmond Larnell & Downey’s study at 253.4% over the nine years. Having a smaller geographic area limits the possibility for growth as there are fewer parcels within the district than there would be if the boundaries were larger.

It should also be noted that the COVID-19 pandemic has presumably

hurt assessment values downtown and thus impacted property value appreciation in the years 2020 and 2021, which may have an impact on the growth rate for 2012-2021 being less significant than 2009-2012. In the 2021 State of Downtown Report, the Downtown Winnipeg BIZ found that while construction had slowed city-wide throughout the city during 2020, in the first six months of 2021 downtown construction had continued to decline while the rest of the city was beginning to recover (Downtown Winnipeg BIZ, 2021). The pandemic has also been noted as a reason for the delay in the completion of the Sutton Place towers, two of the final three towers under construction at True North Square, that were initially slated to be completed in late 2021-early 2022 (Global Winnipeg, 2022).

### **6.1.2 Considering the “But For” Question**

The SHED also merits discussion in relation to the “but for” test commonly used as a requirement in American TIF legislation. The “but for” test maintains a public benefit is served by the use of TIF if a TIF designation catalyzes an increase to the property tax base that would not have happened in its absence (Wagner, 2018). While this question is challenging to answer and my results are not so conclusive as to answer it definitively, they do indicate the property value appreciation that took place within the SHED did not significantly alter the trajectory of growth downtown. Given the difference in appreciation in property values within the SHED relative to the rest of downtown, this may indicate instead that the SHED effectively captured growth that would have occurred downtown regardless of the TIF designation. Within the literature, this has been termed the “value capture hypothesis”, where TIF districts merely capitalize on existing growth patterns rather than act as a catalyst of growth themselves (Anderson, 1990; Dye & Merriman, 2000). Three of the SHED’s primary drivers of property value growth, Centrepont, True North Square, and the RBC Convention Centre Expansion, were all relatively low-value land uses in locations near key investment sites (Canada Life Centre & RBC Convention Centre). Given the investment potential they represented, it seems reasonable to assume they may have been developed in absence of the TIF designation. The likelihood that key SHED developments would have materialized in absence of the TIF designation also seems likely given that Mark Chipman, owner of the Winnipeg Jets, development companies were involved in both the



Centrepont and True North Square redevelopments. The President of True North Sports and Entertainment also stated True North Square would have gone ahead in the absence of the TIF designation (CBC News, 2016b).

### **6.1.3 Summary**

While it may remain impossible to answer with certainty whether the same level of development in the SHED would have happened in the absence of the TIF, my findings do indicate the success of the TIF designation in terms of directing where growth happened over the course of the 9-year period. This indicates that while TIF may not always catalyze development, it is an effective tool for directing growth toward areas that align with key policy objectives.

It is also important to restate the limitations of my property value analysis. While this provides a preliminary indication of the trends for property values, without controlling for other variables these cannot be considered comprehensive findings. Rather these findings illustrate that the SHED TIF was successful in attracting investment to the district. This growth, however, may have also happened in the absence of the TIF designation.

## **6.2 Survey Discussion**

While it is challenging to assert whether development in the SHED would have happened in the absence of the TIF designation, more conclusive answers can be drawn about the impacts residents felt new development within the SHED have had on their neighbourhood. The purpose of the resident surveys was twofold. First, to understand how concentrated public and private investment has manifested in change at the neighbourhood level for those who live within and near the SHED, and second, to explore residents' levels of satisfaction with their neighbourhood.

### **6.2.1 The Importance of Amenities and Services**

Survey responses displayed several connections to themes identified in the literature review. The first of these was the impact that the type of amenities and services introduced in new developments has on the attitudes of residents towards the development as a whole. This was noted by Doucet, Van Kempen, et al. (2011) in their study of the Kop van Zuid in Rotterdam, where the redevelopment was considered more positively by

residents than the researchers expected due to the transit improvements and new amenities it brought to the area. Similarly, results from the surveys showed the majority of respondents felt positively towards the SHED, and in response to the question of neighbourhood satisfaction, it could be assumed this is likely due to some of the changes SHED developments have brought to the area.

The top three areas where residents noted satisfaction were in their access to restaurants and shops, culture & events, and access to transit respectively. The addition of new restaurants, shops, culture and events is implicit in the Sport, Hospitality, and Entertainment District's name. The district is home to three major event venues (Canada Life Centre, Burton Cummings theatre, Metropolitan Entertainment Centre), and has seen the addition of many new restaurants with both the Centrepoint and True North Square Developments. Locations within the SHED are also used for popular events put on by the Downtown BIZ, including the Downtown Farmers Market which happens at Hydro Place or inside City Place Mall during the winter, and the True North Square Plaza which hosts events during the summer months. The importance of essential amenities was also evident in the responses people gave to the locations they visit most frequently in the SHED. City Place Mall was the number one place in the SHED where respondents spent time every week. City Place includes numerous dining options including more affordable fast-food options, as well as a walk-in clinic, drugstore, dentist, post office and bank, all important community amenities. True North Square was the second most frequented place residents visited every week and similarly provides several amenities. These include dining options, a coffee shop, a liquor store, and a new high-end grocery store.

Despite indications City Place and True North Square are important sites of amenities downtown residents are visiting, several responses indicated residents are unable to experience aspects of urban living downtown due to limitations with the amenities that exist downtown. This includes a lack of stores for residents as opposed to downtown workers, with many residents noting most shops are close by 6 pm, and the lack of a major grocery store. In their 2018 article, Ananian et al. termed these urban features as

“neighbourhood life” and noted many residents in Old Montreal were forced to experience them elsewhere, in a way more akin to suburban living. This is similar to the experience of the resident living downtown who noted they find themselves driving to Superstore for most grocery trips due to the cost and more limited selection at the smaller stores downtown. Resident perceptions of safety also arose in the findings as a barrier to experiencing neighbourhood life by two respondents. Not walking dogs on the weekends or visiting the amenities that exist downtown due to safety concerns presents a major loss of “neighbourhood life” and indicates the importance of addressing underlying social challenges that are impacting perceptions of safety downtown if the area is to develop a larger residential community.

One theme from the literature that did not arise in survey responses was the need for neighbourhood amenities such as schools, daycares, or community centres that support those looking to raise a family downtown. This is contrary to a 2019 study in Buffalo that found residents were concerned about revitalization as they feared it would negatively impact people’s ability to raise children in the neighbourhood as new units tended to be geared towards single-person homes (Silverman et al., 2019). This may be in part because this was not included as a specific community aspect in question number 7, though it may have been interpreted as being included in “Access to Essential Services”. Overall, only one response to an open-ended question suggested the need for more public spaces and parks for families to visit. The fact this topic wasn’t mentioned in open-ended responses may also be due to the local context. Downtown is home to a much larger number of single-person households at 59.3% of the population relative to the city as a whole, where only 30.1% of households are single-person households, and also has fewer children below the age of 19 relative to the City as a whole (Statistics Canada & City of Winnipeg, 2016). The 2020 Housing Needs Assessment indicated that there is a trend in Winnipeg indicating families have a preference for single-family housing located outside of the city center (Carter et al., 2020). Thus, few responses indicating the need for more family-oriented amenities and infrastructure is likely a result of where in the city people with children are choosing to live.

### **6.2.2 Desire for Density**

A common theme throughout the open-ended survey responses was the effect new development and amenities have had on bringing people downtown. Increased foot traffic was regarded by the majority of survey respondents as a positive change associated with development around the Canada Life Centre. Respondents noted the importance of foot traffic for supporting businesses in the community and adding more residents to the area. This finding bears a similarity to Ananian et al.'s finding that residents in Old Montreal were not threatened by increasing density in their neighbourhood. Rather they saw it as a positive development for attracting the population density that would encourage investments in community infrastructure by the local government (2018). While densification may be met with resident opposition in less central neighbourhoods, the SHED is in the city centre where nearly all residential dwellings are multifamily. While not implicitly stated, residents reacting positively to having a greater population base to support local businesses and fill new housing units indicates an implicit awareness of the ways density contributes to having the amenities required to support community life in the city's core.

### **6.2.3 Differences between Short and Long-term Residents**

While long and short-term residents have overall positive attitudes towards both the SHED and new developments around the Canada Life Centre, longer-term residents who had lived downtown for five or more years were likely to have slightly more negative attitudes than those who had lived downtown for fewer than five years. This finding is consistent with the literature, where several authors have noted longer-term residents are less likely to believe new developments have improved conditions (Antunes et al., 2020; Houston & Zuñiga, 2021). While this has been noted to often be a function of longer-term residents associating new developments with their previous use, this was not a finding that was indicated in the surveys. The primary themes in terms of dissatisfaction that emerged in comments from longer-term residents were around the topics of safety, increased visibility of systemic social challenges such as homelessness and addiction, and declining affordability of the area. Within the context of the SHED, this finding also makes sense given the five-year time frame used to differentiate longer-term residents from those that are more recent.

True North Square, the focal point of development in the SHED officially opened in 2018. Therefore newer residents may have in part been drawn to the area due to what this new development offers.

#### **6.2.4 Affordability Concerns**

While not a prominent theme in the surveys, responses mentioning declining affordability, housing quality, gentrification, and the cost barriers associated with new amenities in the SHED may be an indication new development is contributing to indirect displacement. Associated with new build developments, indirect displacement arises when existing residents are pushed out of the neighbourhood due to rising rents and sociocultural changes that make them feel less welcome in their community (Davidson & Lees, 2010). Housing downtown has indeed become unaffordable more quickly relative to the rest of the city. From 2012 to 2022, rents downtown grew by 60.3%, whereas the rate of increase for the city was 49.5% (CMHC, n.d.). Downtown was also noted to be among the neighbourhoods with the greatest concentration of housing need and poor-quality housing in the City's 2020 Housing Needs Assessment Report, and has lower average individual incomes relative to the city-wide average, at \$33,939 and \$44,915, respectively (Statistics Canada, 2016). The mention of the high cost of events and amenities around the Canada Life Centre indicates that the socio-cultural changes associated with indirect displacement may also be beginning in the area. The response that noted the new Liquor Store location inside True North Square is less accessible than the former location at City Place Mall is also indicative of the type of change that may make lower-income residents feel less welcome in their neighbourhood. While City Place offers a variety of amenities accessible to those with lower incomes, the cost of amenities at True North Square indicates their target clientele is higher-income earners.

#### **6.2.5 Safety and Systemic Inequality**

At 41.1%, safety was the community aspect with which survey respondents were the least satisfied. Many of the open-ended responses that discussed safety did so in relation to the visibility of poverty downtown, specifically mentioning homelessness, visible drug use, and mental health crises as reasons for feeling unsafe. Even though those who are unhoused are more

likely to be the victims of crime than the perpetrator, stigma continues to affect the way visible poverty shapes attitudes towards safety downtown. Other respondents however noted these challenges are symptoms of systemic poverty and indicate the need for investments that benefit those who are the most marginalized in the community. The surveys also indicated a perception safety downtown has declined since the start of the COVID-19 pandemic, a sentiment that seems to be shared by the city at large with the 2022 Winnipeg Police Service Citizen Survey finding that 90% of people don't feel safe walking downtown alone at night (Winnipeg Police Board, 2022).

While safety has always been a concern in the SHED as evidenced by the PADS "mall management" approach, the Downtown Community Safety Partnership (DCSP) is the most recent attempt to address safety concerns in and around the SHED. The DCSP is an organization first proposed by Mark Chipman to provide non-emergency responses to people downtown who require social supports. The organization works together with two outreach teams to provide healthcare, addiction, and mental health support to people on the street downtown. The organization also works with Ogijiita Pimatswin Kinamatwin, an Indigenous organization that supports men who have been involved in the criminal justice system as a means of including people with lived experiences in their outreach work (Walby & King, 2022). While these aspects of the DCSP represent an improvement over punitive police responses to homelessness and drug use, authors Walby and King identify that despite the less punitive approach taken by the DCSP, they remain focused on moving people out of the SHED to maintain the appearance of safety for those visiting the Chipman investments in the area (Walby & King, 2022).

Thus, while several surveys noted their desire to see increased foot patrols in the area, it remains important to question the extent to which this response will help to address the underlying reasons the DCSP exists, which are systemic inequality and poverty. This question seems particularly important given the SHED's TIF designation. This financing mechanism, if used differently, has the potential to support real safety solutions such as affordable housing, food security, or creating employment opportunities.

### **6.2.6 Imagining a different future for TIF**

As both this study and the literature on TIF demonstrate, it is a tool that can shape where and what types of development take place in a city. Given the ongoing challenges downtown that many residents noted, it is worth imagining other types of community building this financing mechanism may be used for.

Given TIF is premised on rising property values, concerns regarding gentrification have led to some municipalities dedicating TIF funds to the construction of affordable housing to offset the impacts of gentrification. One example of this is in Portland, Oregon, where the city has established a set-aside policy that devotes 40% of tax increments in urban renewal TIF zones to affordable housing. Using these funds, the city was able to support the construction of 2,200 affordable housing units meant to support those with incomes lower than the Median Family Income for the city from 2006-2014 (Cortright, 2019). The City of Winnipeg has also used TIF to finance affordable housing. One of the City of Winnipeg's first TIF programs was the Downtown Residential Development Grant Program. This program provided incremental taxes as a grant to support the conversion of vacant buildings to condominiums and rental units in the City's core, with a provision that a certain number of units be rented at an affordable rate (Province of Manitoba, n.d.b). More recently, the City of Winnipeg's Affordable Housing Now program provides support both through TIF and capital grants for projects that have more than 30% of their units rented at less than 80% of the Median Market Rent (City of Winnipeg, n.d.).

Another good example of TIF being used to support community priorities comes from Chicago, Illinois. Chicago is widely considered the jurisdiction where TIF has been the most readily applied in the United States. TIF has not been considered to provide many benefits to the low-income communities in Chicago where it has been applied. In 2014, community organizers worked to develop a Participatory Budgeting process that would allow community residents to decide how to allocate \$2 million in unspent TIF funds in Chicago's Central Park TIF district. This represented the first time a Participatory Budgeting process was used in the United States to allocate TIF funds. In the process, the community first identified 4 priority

areas they would like to see addressed. These were affordable housing, job training, investments in public works, and support for small businesses. There was a request for proposals issued for projects that were submitted by community residents or business owners, that fell under one of the four categories and would result in benefits for the residents of West Humboldt Park (Carroll et al., 2016). The five projects that wound up receiving funding were: Green roof retrofits for four buildings, a new skate park, establishing a culinary institute in partnership with a local restaurant, Beautification along Chicago Avenue, and the establishment of a microloan project for small businesses (PB Chicago, 2015).

Given the challenges identified in downtown Winnipeg and the SHED, the use of further TIF funds to support community priorities is an idea that merits future attention.



## **7. Conclusion**

This section of the report summarizes how the research findings respond to the research questions, identifies possible avenues for future research, and concludes with some final thoughts regarding the findings from the project.

### **7.1. Answers to Research Questions**

My first research question intended to explore the quantitative aspects of TIF success by looking at changes to property values within and around the SHED. This question asked:

How have property values in downtown Winnipeg's Sports, Hospitality, and Entertainment District (SHED) changed in relation to the rest of downtown since the inception of the TIF district?

I found that since 2012, property value appreciation downtown has largely been driven by new developments within the SHED. During this time, total property values in the SHED grew by 253.4% while the total values of the rest of downtown grew by 77% over the same time frame. However, the total rate of growth for all parcels within the downtown zoning by-law over this time frame was 95.7% over the nine-year period, which works out to a smaller annual increase than the 83.5% growth seen over three years from 2009 to 2012.

This indicates that while the TIF designation in the SHED appears to have successfully directed growth to the area around the Canada Life Centre, it appears likely this growth would have happened irrespective of the TIF designation. This finding indicates that the SHED may have shifted development to the specific location, rather than spurring growth that would not have otherwise happened.

Further study to explore changes to property values within the district is warranted to better understand TIF's success in the local context in this regard.

My second research question asked:

How do residents living downtown feel about the development that has taken place in the SHED TIF district?

Through the resident survey, I found the majority of downtown residents feel positively toward the SHED and the new developments within it. Positive improvements residents noted in relation to the area were: improved streetscaping, an increase in foot traffic and events, and good access to bars and restaurants. These areas have all benefited directly from TIF, demonstrating some of the public benefits TIF has provided.

Despite the overall positive outlook residents had towards the SHED, many responses highlighted ongoing challenges being faced downtown that private development alone is unable to solve. In the open-ended responses, many residents identified a lack of community-oriented amenities downtown, noting many businesses in the area close after 6 pm, and that the lack of a chain grocery retailer is a significant challenge to accessing affordable groceries. Housing quality and affordability also emerged as a source of dissatisfaction, with some residents noting their concern that new development and rising rental costs may push lower-income residents from the neighbourhood over time. While no questions in the survey asked about income, responses indicated income is likely to play a role in shaping resident perspectives towards the SHED depending on if they can afford access to the new amenities and events in the area.

Lastly, the surveys identified that safety remains a major concern for residents downtown. While this concern was primarily addressed as a fear for personal safety, others also noted a concern for how other people's perceptions of safety downtown were impacting the businesses and residential market downtown. These responses also by and large connected safety concerns to the visibility of systemic challenges such as homelessness, mental health, and addictions. The prominence of these responses highlights the dire need for greater investment in life-sustaining services in the downtown core.

## 7.2 Areas for Future Research

Due to the condensed nature of the Capstone course, my research was limited in its scope and what it could accomplish. This leaves several fruitful areas for future research to explore in relation to the research questions. These areas are outlined below:

A sophisticated analysis of property value change in the SHED:

- Due to the time constraints of the course and my limited experience with quantitative analysis as a research tool, I believe future studies examining property value change within the SHED could provide a deeper understanding of the nuances influencing property value growth in the area. Additionally, it is anticipated there will be more opportunities to explore the long-term effects of the TIF designation.

Comparison to performance in other Canadian TIF districts, or research into other economic development incentives that Canadian cities are using:

- Literature on the use of TIF in Canada is extremely limited. This makes comparisons and investigations into Canadian TIF projects a potentially rich area for future study.
- The fact that few Canadian cities are using TIF also presents an area for future study. Research that explores what other tools Canadians municipalities are using to attract economic development and influence the provision of public space in their cores would be an interesting compliment to studying examples of TIF in Canada.

Community engagement to understand areas where residents would like to see further public investment:

- This research highlighted that many residents were eager to discuss their thoughts on their neighbourhood and discuss their concerns and hopes for the future. It also demonstrated that many areas could be improved through future public investment. Future research could explore these perspectives more directly to identify opportunities for future investment in the district.

TIF in a post-pandemic world:

- Although the COVID-19 pandemic was not a focus of this research, the impact the pandemic has had on downtown Winnipeg was relevant to

both the property value analysis and the resident survey. As cities look to adapt their downtown cores to the reality of new work patterns, there is an opportunity to explore what role tools like TIF play in this.

### **7.3 Final Thoughts**

TIF is a potential tool for municipalities looking to direct development towards a specific area or finance the improvements necessary to render an area developable. As with all tools, however, TIF also has the potential for misuse. For this reason, transparency regarding the decision process and amounts of funding are critical to ensuring a public benefit beyond private profit is a criterion required for TIF's use. One of the primary things my research demonstrated is how challenging it is to explore these questions, given the information currently available through the City of Winnipeg and the Province of Manitoba. Despite the SHED being an investment of public funds, there is limited publicly available information regarding expenditure amounts, categories, and timeframes. Throughout these eight months of research, I was unable to find a final report that details how money has been spent in the SHED to date. Research on this topic was further complicated by the numerous changes that have been made to the SHED boundary since it was first established. This makes it challenging to know exactly how much money was spent where and indicates the need to make this information readily accessible to the public.

Further to this, securing property value data for the city is also challenging. The data publicly available through the City of Winnipeg Open Data Portal only includes the most recent property value data sets, making comparisons across time more challenging and time-consuming, due to the need to request data from the city. Making this historical data available would be of benefit to the quality of research that is conducted on growth in Winnipeg, and could provide interesting insight into topics like TIF's performance in the local context.

This research also demonstrated there remain serious challenges for residents living downtown. While development around the Canada Life Centre has brought more foot traffic, amenities and events to the area, serious gaps continue to exist in terms of the infrastructure required to

build a strong and desirable community. In particular, the need for a grocery store and shops geared towards the residents in the area would provide a welcome improvement for those hoping to enjoy neighbourhood life downtown. Finally, this research reiterated that in the absence of life-sustaining supports to address the intersecting needs for affordable housing, food security, mental health and addiction support, safety concerns will remain a challenge into the future.

Examples from other jurisdictions and other TIF programs in Winnipeg point to the possibility of using TIF to invest in the needs of the community. Building complete communities was identified as a desired objective for the SHED district, however, this requires further investment in housing and neighbourhood amenities. Given the private profit that has been accumulated with the assistance of public subsidies in the SHED, exploring further areas future TIF support could be directed provides the potential to reimagine how this tool is used in the future.

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# Appendices

## Appendix A - Property Value Data Sources

City of Winnipeg. (2009). Assessment data for Downtown Zoning By-law Parcels. [Data Set]. City of Winnipeg, Assessment and Taxation Department.

City of Winnipeg. (2012). Assessment data for Downtown Zoning By-law Parcels. [Data Set]. City of Winnipeg, Assessment and Taxation Department.

City of Winnipeg. (2022). Map of Assessment Parcels. [Data Set]. City of Winnipeg, Assessment and Taxation Department. <https://data.winnipeg.ca/Assessment-Taxation-Corporate/Map-of-Assessment-Parcels/rt7t-3m4m>

## Appendix B - Map, Eligibility Boundary for Survey Respondents

This map was included in the survey both to identify whether respondents lived within the survey eligibility area and to identify the SHED in questions.



## Appendix C - Survey Information and Consent Form



### INFORMATION AND CONSENT FORM – SURVEY

**Informed Consent:** You can print this screen to keep a copy of the consent form.

**Title of Project:** Exploring the Impacts of the SHED: Winnipeg’s first TIF District

**Student Name:** Anna McKinnon, mckinn10@myumanitoba.ca

**Course Instructor:** Dr. Orly Linovski, Associate Professor, Department of City Planning, University of Manitoba. (204) 474-6242, orly.linovski@umanitoba.ca

**Course Information:** CITY 7050, City Planning Capstone Project. Department of City Planning, Faculty of Architecture

This consent form is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

**Summary of Research Project:** This research project is looking at the impacts of Winnipeg’s first Tax Increment Financing (TIF) District on downtown. TIF is a development incentive that is used to increase private investment in areas that may not otherwise see development due to cost barriers. As a part of this study, residents who live within or near to the SHED TIF district will be surveyed in order to understand how often they visit locations within the TIF district, how they feel about the area, and what changes they have noticed in the area over the past 10 years.

**Specific activities to be completed by Project Participant and Time Frame:** Participation involves completing a survey that will take approximately 7 minutes. Participants will have the opportunity to enter in a giveaway for a \$50 gift card to a restaurant, grocery store, or coffee shop of the winner’s choosing as an incentive to participation. Participants must be over the age of 18 and live within the eligibility area indicated on the survey form. The survey will ask questions about the area around the Canada Life Centre, how you feel about new development in this area, and your satisfaction with various aspects of your community. Questions will be submitted through either an online survey or answered verbally with the PI. Both online and in person participants will have the option to be entered in the gift card giveaway. No identifying information other than a method of contact (phone or email) for entry in the gift card giveaway will be requested. Contact information will be stored separately from the survey answers and will be destroyed upon the end of the giveaway in March 2023.

**Description of Course Assignment:** City Planning graduate students must complete a Capstone Project as a part of their Master’s degree. The goal of the project is for students to conduct in-depth research on an issue of importance for planning practice. The students’ information gathering projects will be presented in class and will form the basis for a written report at the end of term.

In this case, my objective is to better understand the impacts of the first Tax Increment Financing district that has been designated in Winnipeg.

The projects are undertaken under the supervision of the Course Instructor, Dr. Orly Linovski (see contact information above), in accordance with the protocols of the Human Ethics Research Board at the University of Manitoba for research involving human subjects. This research has been approved by the Research Ethics Board at the University of Manitoba, Fort Garry campus. A copy of this Consent Form has also been reviewed and approved. Consent forms listing Project Title and the specific activities to be completed by participants will be submitted to the Instructor and kept on file for information purposes only for two years (or until the next City Planning program accreditation), in accordance with University ethics policies.

**Benefits:** Direct benefits may include the opportunity for participants to share their perspective on a planning issue or challenge. Indirect benefits are that the final Capstone Projects will contribute to planning knowledge and may result in new strategies or policy directions to address planning issues and challenges. Students will also benefit by learning about conducting ethical research. **Risks:** The risk of participating in the surveys is no greater than risks encountered in everyday life. **Confidentiality:** Information collected from survey participants will be used as a part of the Capstone Project. All information will remain anonymous. A form of contact information will be requested only for entry in the gift card giveaway, but this will be stored separately from survey data and will not be connected to survey responses. All contact information will be deleted upon completion of the gift card giveaway in March 2023.

**Feedback:** The results from this project may be used for conference presentations and/or publication in journals and other academic and professional resources. Students completed Capstone Projects will be publicly available through the University of Manitoba's website (<https://umanitoba.ca/architecture/departments-city-planning>)

**Use of Data, Secure Storage, and Destruction of Research Data:** All information will be treated as confidential and securely stored in a private place until it is destroyed. Contact information for the gift card giveaway will be destroyed in March 2023 once a winner has been selected, and all other survey data will be destroyed at the conclusion of the project in June 2023.

Copies of consent forms will be securely kept on file by the Course Instructor for information purposes only for two years and then destroyed, in accordance with University ethics policies. Your agreement on this form indicates that you have understood to your satisfaction the information regarding participation in the research project and agree to participate as a subject. In no way does this waive your legal rights nor release the researchers, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study anytime prior to submitting the survey, and may skip any questions you prefer not to answer. Your responses will not be recorded until submitted. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

The University of Manitoba may look at your research records to see that the research is being done in a safe and proper way.

This research has been approved by the Research Ethics Board at the University of Manitoba, Fort Garry campus. If you have any concerns or complaints about this project you may contact any of the above named persons or the Human Ethics Coordinator at [humanethics@umanitoba.ca](mailto:humanethics@umanitoba.ca); or 204-474-7122.

Thank you for participating in this project. Your cooperation and insights are very valuable, and are greatly appreciated!

I consent to the dissemination of material provided to the student for use in their Capstone Project and in course materials. I understand that the information I provide will be incorporated in a presentation and report. I understand also that all research data will be treated as confidential, stored in a private and secure place, and subsequently destroyed at the end of the course by the student.

I have understood the details of this consent form (YES/NO)

I confirm that I am 18 years of age or older (YES/NO)

I agree to participate in this study (YES/NO)



## Appendix D - Downtown Resident Survey

Microsoft Forms was used to administer the online survey due to the University of Manitoba's Ethics requirements. Participants were asked to answer the eligibility question and then were shown the consent form before completing the consent questions. Below is a complete list of questions respondents were asked.

### Survey Questionnaire

\*Questions marked with a star indicate an answer was required

This survey is intended for residents living downtown within the boundary shown in **blue** on the map on the right. Do you live within the boundary shown in blue? \*

YES

NO

### (CONSENT FORM)

I have understood the details of this consent form \*

YES

NO

I confirm that I am 18 years of age or older \*

YES

NO

I agree to participate in this study \*

YES

NO



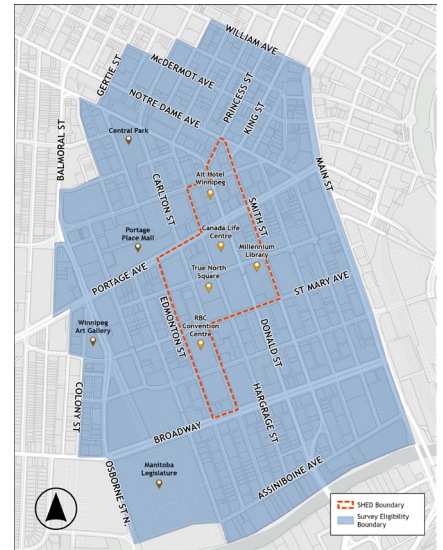
1. How long have you lived downtown (same address or another within the same boundary shown in blue on the map)?

Less than 1 year

1 – 5 years

5 – 10 years

10+ years



2. Do you spend time at any of the following locations? How often do you visit them?

Weekly – 1+ times per week

Regularly – 1+ times per month

Occasionally – once every few months

*(The question had boxes participants could check for each location)*

	Weekly	Regularly	Occasionally
Canada Life Centre			
Millennium Library			
City Place			
Hargrave St Market			
True North Square Plaza			
Burton Cummings Theatre			
Winnipeg Convention Centre			
Browns Social House			
Merchant Kitchen			
Giant Tiger			

3. Are there any other locations within the SHED (area within the red dotted boundary shown in the image) that you spend time at? How often do you visit them?

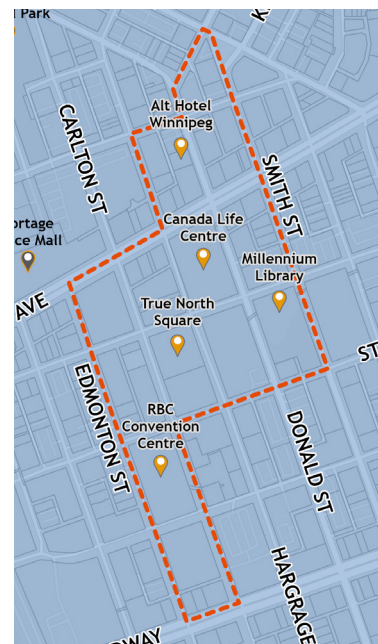
Weekly – 1+ times per week

Regularly – 1+ times per month

Occasionally – once every few months

*(enter your answer)*

4. On a scale of 1 to 5, with 5 being positive, how would you rate your feelings about spending time in the SHED (area within the red dotted boundary shown in the image)?



5. Overall, what do you feel that the impact of new developments around the Canada Life Centre has been on your community?

Very Positive

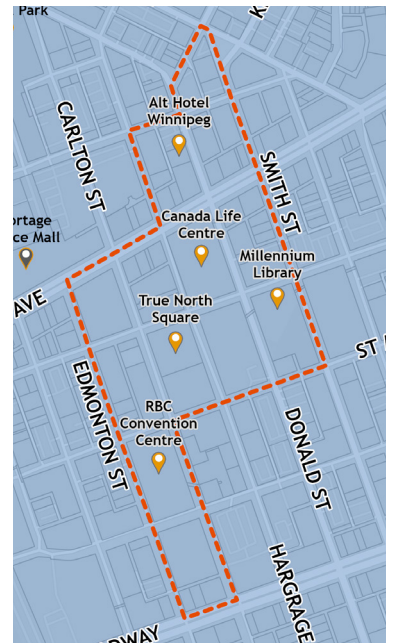
Somewhat Positive

Neutral

Somewhat Negative

Very Negative

6. Overall, do you notice a difference in the quality of streetscaping within the SHED area indicated in the image by the red dotted boundary? (ex. Improvements to lighting, public art, improved sidewalks, benches, storefront improvements, etc.)



- Streetscaping has greatly improved
- Streetscaping has somewhat improved
- Streetscaping has not noticeably improved
- Streetscaping has greatly deteriorated
- Unsure

7. How would you rate your satisfaction with the following aspects of your community?

*(The question had boxes participants could check for each aspect)*

	<b>Very Unsatisfied</b>	<b>Unsatisfied</b>	<b>Neutral</b>	<b>Satisfied</b>	<b>Very Satisfied</b>
<b>Parking</b>					
<b>Sidewalks</b>					
<b>Bike Infrastructure</b>					
<b>Access to Transit</b>					
<b>Housing Quality</b>					
<b>Housing Affordability</b>					
<b>Access to Essential Services (e.g. Healthcare, Groceries)</b>					
<b>Access to Restaurants/ Shops</b>					
<b>Recreation Opportunities</b>					
<b>Culture/Events</b>					
<b>Public Spaces</b>					
<b>Safety</b>					

8. Do you feel that the community has changed over the past ten years? If yes, how, and has the change been positive or negative?

*(enter your answer)*

9. Could you share some details of the positive or negative impacts you feel that new development around the Canada Life Centre has had on your community?

*(enter your answer)*

10. Is there anything else you'd like to share?

*(enter your answer)*

11. Please enter a phone number or email address where you can be contacted for the \$50 gift card giveaway contest

*(enter your answer)*

## Appendix E - Responses to Question 7

Question 7 asked respondents “How would you rate your satisfaction with the following aspects of your community?” The table below represents the complete set of responses received.

	<b>Very Unsatisfied</b>	<b>Unsatisfied</b>	<b>Neutral</b>	<b>Satisfied</b>	<b>Very Satisfied</b>
<b>Parking</b>	7.6%	16.9%	37.3%	28.0%	10.2%
<b>Sidewalks</b>	6.4%	17.3%	20.0%	45.5%	10.9%
<b>Bike Infrastructure</b>	2.7%	18%	33.3%	33.3%	12.6%
<b>Access to Transit</b>	7.1%	8.9%	25.7%	36.3%	22.1%
<b>Housing Quality</b>	6.2%	17.7%	23.9%	35.4%	16.8%
<b>Housing Affordability</b>	13.4%	17.0%	25.9%	38.4%	5.4%
<b>Access to Essential Services (e.g. Healthcare, Groceries)</b>	13.4%	16.1%	18.8%	42.9%	8.9%
<b>Access to Restaurants/ Shops</b>	3.5%	5.3%	23.0%	43.4%	24.8%
<b>Recreation Opportunities</b>	2.7%	21.2%	23.9%	38.1%	14.2%
<b>Culture/Events</b>	2.7%	5.4%	25.9%	45.5%	20.5%
<b>Public Spaces</b>	5.5%	13.6%	28.2%	38.2%	14.5%
<b>Safety</b>	20.5%	20.5%	18.8%	23.2%	17.0%