

APPENDICES

NEW RIVER MASTER PLAN REPORT

APPENDIX A: PUBLIC WORKSHOP SUMMARY

Fort Lauderdale Downtown New River Master Plan Public Meeting March 13, 2007 - Comments

Theme 1: Las Olas Gateway

1.1 What role does Las Olas Boulevard play in celebrating the City's rich history and the current vitality and image of Fort Lauderdale?

SUMMARY

- It's THE place to go.
- History of the street (who started it and can that be incorporated)
- Buy in from the business and development community as well as the merchant association
- Should have a strong merchant association.
- Draw a variety of people. Not just the younger crowds.
- It's a destination for shopping and entertainment
- A great public space
- Different than any other resort area
- Stability of the area
- Not full of large chain stores that are common elsewhere
- It markets vitality
- Branded Image
- Las Olas is a physical place; mental connection

Most feel that Las Olas is a significant part of the city's history. It's a great public space and it does market vitality.

1.2 What qualities of the "historic" Las Olas area are important to celebrate and maintain and why (buildings, landscapes, retail mix, street scale, etc.)?

SUMMARY

- Expand the connections. Do not just focus on the areas where all the action is taking place, but also those areas that can connect better to the residential areas.
- Mix of uses – shopping, restaurant, galleries, apparel, home goods, etc.
- Authentic, evolved over time, not cookie-cutter
- Maintain pedestrian traffic along Las Olas to tunnel—do not encourage Riverwalk to begin at 9th Avenue—will lose shoppers along western end of Las Olas (Cheesecake node)
- It's relatively safe.
- Not too upscale, but not too tacky.
- Keep the historic Riverside Hotel
- Too many buildings and parking garages blocking the river
- Tree lined streets
- Keep old statues
- Keep on-street parking
- Lanterns
- 2 story Live-Work quaintness / Mixed Use
- Landscaped street islands
- Brick all pedestrian walkways
- Las Olas as a destination
- Stranahan House
- Tunnel
- Pedestrian friendly building scale oriented toward street
- Maintain Café look
- Maintain uses at street level

There is a large range of comments for this category. The qualities most important to maintain are tree-lined streets, traditional mix of uses, and pedestrian friendly environment.

1.3 How can the Las Olas Boulevard area be improved?

SUMMARY

- Improved landscaping and increased maintenance of medians and planter boxes
- Encourage more "high-end" retailers (Izod, Burberry, etc.)
- Create BID or some kind of revenue generating program for corridor
- Traffic (ingress and egress)
- Mass Transit
- Elevated flyway
- Infrastructure should be tied in (very important).
- Buildings should tie into the street and have a good transition (a bad example of this would be the FAU building).
- Vegetation needs to be improved
- More pedestrian crossings at Las Olas
- Extend store hours
- Keep large trucks off Las Olas
- Widen Sidewalks
- Keep big box stores out
- Take away parking lane
- Improve planters and signage
- Provide affordable housing in Las Olas area
- Landscape median should be extended length wise
- On-Street parking should be eliminated*
- Not enough parking available
- No shuttle as an alternative to driving
- Street should be wider for autos*
- Riverwalk expansion to east of Stranahan
- Use retail as a way to keep people walking
- Parking behind Las Olas is well located but difficult to find
- Utilize dead space along West Las Olas
- Use Worth Ave and Lincoln Road as examples

A wide variety of comments were given for how the street can be improved. Most feel that Las Olas can be improved by increasing parking in the area, more pedestrian crossings, improving the landscaping / planters, and providing more mass transit options to Las Olas.

1.4 How can the Las Olas Boulevard area be better connected to the river?

SUMMARY

- Provide Riverwalk link along the south side of Stranahan House
- Ease of access is critical, that includes convenience of parking, and direct pedestrian visual connection from Las Olas.
- The bridges have squeezed pedestrian corridors out. These should be replaced.
- Increased lighting to brighten up the area to increase security and entice pedestrians to walk.
- Appropriate signage for individual areas.
- Open air markets under the bridges.
- Public maps that indicate the area and give you a "You Are Here" point.
- Pedestrian sidewalk along may not be sufficient to make the north south connection, encourage active pedestrian use (like restaurants and shops) on certain north south side streets between Las Olas and New River.
- Provide water taxi stop at 9th Avenue and Las Olas
- Provide direct view to River, with active uses along connecting streets
- Provide more obvious paths from existing destinations
- Provide a connection to the water from parking garages (City and County)

A number of people felt that the water taxi could play a major role in the connection of the River and Las Olas. More stops on the Las Olas part are needed. More visible paths between the two marked by signs and maps are another popular potential solution. Continuing the Riverwalk to Stranahan House was brought up a few times.

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- Continue Riverwalk to Stranahan House
- Hyde Park Market site as a way to connect to the river
- Riverside Hotel parking garage is an impediment
- North / South avenues should be more welcoming to draw traffic (all kinds) north and south
- Access through Stranahan House is hidden and could be more open to draw people to river
- Water Taxi stops waiting space limited in size, exposed to the elements

Theme 2: Cultural Arts Gateway

2.1 What role can the Arts & Entertainment District have in Fort Lauderdale and Broward County?

SUMMARY

- Respect the Arts & Entertainment agreement that has been made in the past. Increase the time limits on the agreements or have no time limits imposed.
- Ensure the any commercial or retail is feasible for the area through market studies.
- Heritage is important. Allow local performances.
- Quality venues for both residents and tourists (700,000 people/year to the A&E district)
- Collaborate with other organizations to partner / coordinate with event planning initiatives

Collaborate with outside event planners to provide local and out of the region entertainment. Make sure commercial is feasible with the area.

2.2 What types of cultural uses should be encouraged to complement existing arts and entertainment venues, including the Broward Center for the Performing Arts, Museum of Discovery and Science, Old Fort Lauderdale Village & Museum, and the Fort Lauderdale Museum of Art, among others?

SUMMARY

- Emphasize the variety of music, culture and performing arts of the area.
- Diversify for tourism both uses and services.
- Must be able to be supported year round by the local residents and support the local residents lifestyles.
- Aquarium—tie into "marine component"
- Signature, interactive public art with water as theme (like Battery Park City)
- More outdoor plays
- More sidewalk cafes
- Put something in Esplanade park
- Smaller events / Smaller theater productions
- Small Jazz Groups
- Events to attract college students

Outdoor plays and art shows seem to be popular cultural use ideas.

2.3 What mix of additional uses (office, dining, retail, residential, hotel) will complement these cultural uses? How can cultural arts visitors be encouraged to spend more time and money in Downtown Fort Lauderdale?

SUMMARY

- Sufficient density is the key to sustain vitality.
- Markets
- Quality restaurants along river, outdoor cafe
- Create mix of uses (1st floor art galleries, lofts for artists)
- Need more residential

A good mix is what people are looking for here. Residential and small retail shops. A few people mentioned a hotel with a mix of uses.

- Uses / Functional uses near parks, near Broward Center for Performing Arts
- Passive Parks are ok, but don't really serve a purpose for the majority demographic
- Hotel Uses
- Any uses that generate foot traffic
- Boutique Hotel
- Black Box Theater

2.4 How can open spaces (such as Esplanade Park and Huizenga Plaza) be utilized to complement the Arts & Entertainment District?

SUMMARY

- Restaurants in and on the parks.
- Activate the entrances to the parks to entice use.
- Encourage street vendors by having a less difficult permit process for them.
- Allow fixed merchants to vend on the street as well as in the store.
- Provide better night time lighting –parks are currently black holes
- Provide cover from elements (rain, sun)
- Provide more children play areas
- More signage to make park hopping easier
- More Art / Antique shows
- Showcase of Restaurants "Taste of Riverwalk"
- Museum exhibit overflows into adjacent or nearby open spaces
- More shade areas
- Need to complete rehab of Esplanade Park
- Cultural Arts Programming essential in open spaces

More shade areas and lighting appeared to be a consensus here. Maximizing open space as a way to keep the areas active.

2.5 How can cultural arts and entertainment uses and events connect more directly to the river?

SUMMARY

- Encourage merchants to provide venues for local artists.
- Grass amphitheatre.
- Floating theatre.
- Emphasis on holiday events such as 4th of July.
- Make the district seem "smaller" (ie. more connected and less sporadic) by filling in with active uses toward River
- Near time solution of providing shuttle service, moving bridge, walkway
- Create more active uses to bring people in
- Esplanade Park is best way to connect arts to river

Many liked the floating stage for performances, or perhaps a small amphitheatre. A few mentioned that esplanade park would be the best way to connect arts to the river.

Etc.

- Noise ordinance must be carefully regulated
- Pedestrian bridge across river

Theme 3: Retail & Maritime Destination

3.1 Where should ground floor retail be located and what types (tourism, dining, convenience, shopping, etc.)?

SUMMARY

- Must be easy to get to.
- Relate to the lifestyle of the area and be appropriate (drycleaners, drug store, etc...)
- Retail, dining, etc. should be marine/water focused (ie.

Most feel that ground floor retail should be close to the water with a maritime theme. The stores and restaurants should be authentic and not chain. Between Railroad and Andrews Avenue

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<ul style="list-style-type: none"> Seafood restaurants, yachting equipment...) Make it authentic, not like a shopping mall Need for excellent cuisine (not chain) For the Riverfront site, consider "Granville Island" – culinary destination Between Railroad and Andrews Avenue south side (More retail and coffee shop) Add fresh market on south side 	on south side is a popular location.
<p>3.2 How can public waterfront access and active maritime uses co-exist?</p> <ul style="list-style-type: none"> Amenities that the local community will use. Integration of uses (retail & maritime) Accessible docks along the river with a restriction on the height of boats. Variety of dockage (i.e. kayaks, canoes and other small boats) to preserve the views. Find suitable alternatives to docking parallel to the river edge. Provide a destination for boaters More available access to the public Keep maritime uses maintained Combine marina uses w/ public amenities i.e. restaurant space, pool, tourist attraction, maritime museum, shops etc. 	<p>SUMMARY</p> <p>Provide a variety of dockage with destinations for boaters. Keeping the area maintained would help attract more boaters, locals and tourists.</p>
<p>3.3 What types of maritime uses should be maintained, encouraged, or expanded along the Riverwalk? Where should they be located?</p> <ul style="list-style-type: none"> Variety of boating (large and small) A permanently docked antique boat as a Riverwalk Museum may become a permanent fixture on the Riverwalk to draw visitors. Keep dockage, wet marina component along Riverwalk, but push non-water dependent uses to rear of properties (away from water) Expansion of Marinas would be positive Create specific areas for boat dockage and marina uses Elevated Riverwalk in front of boat storage 	<p>SUMMARY</p> <p>A river / riverwalk museum or store as a way to draw people to the area was brought up a few times. Expansion of marinas to fit more boats is another popular idea.</p>
<p>3.4 How can water-based transportation be more useful for tourists and residents?</p> <ul style="list-style-type: none"> More water taxis—frequency, more stops, more gondolas Train bridge "timer" does not work Provide for back and forth ferry taxi across the river Duck Trolley amphibious vehicle (Like Boston, Philly, WPB) Water Taxi (Individual pick up service needed) 	<p>SUMMARY</p> <p>Water taxi and small ferry across river to connect north and south sides.</p>
<p>3.5 What kinds of public spaces can accommodate maritime uses, marina activity, retail uses, and pedestrian activity? What are the special qualities of this type of space (plazas, bridges, boardwalks, piers, landscaping, etc.)?</p> <ul style="list-style-type: none"> Wider piers, walkways, docks Use wayfinding signage as branding opportunity 	<p>SUMMARY</p>
<p>3.6 What might change if the Flagler East Coast (FEC) rail line is reactivated for commuter rail?</p> <ul style="list-style-type: none"> Allow pedestrians to get on and off in these locations Must build tunnel – as to not impact boat traffic 	<p>SUMMARY</p> <p>Most feel that activating this track as a commuter rail would be nothing but positive for</p>

<ul style="list-style-type: none"> More activity to tie river area to the region FEC commuter rail must be incorporated w/ pedestrian transportation and access corridor 	the Riverwalk area. A greenway should accompany it.
<p>Theme 4: River Park Promenade</p>	
<p>4.1 How can natural features better contribute to the Riverwalk experience (New River, canals, trees, and landscapes, etc.)?</p> <ul style="list-style-type: none"> More palm and shade trees More Landscaping Create Natural Habitat areas (Butterfly house, Bird Areas) Buenos Aires Riverfront as example Green Arcades 	<p>SUMMARY</p> <p>Shade, landscape and green space!</p>
<p>4.2 How much open space is needed for the future of Downtown?</p> <ul style="list-style-type: none"> We have all the open space we already need in downtown Fort Lauderdale It's the smart use of these spaces that is crucial New developments should provide open space and plazas More open space for playgrounds and skateboard parks Quantity isn't the real issue, functionality and quality is most important 	<p>SUMMARY</p> <p>The consensus here is that we have enough open space, we just need to maximize the area for a positive use.</p>
<p>4.3 What kinds of open spaces are needed (green parks, paved "plazas", playgrounds, etc.)? How can these different types be distributed along the length of the River?</p> <ul style="list-style-type: none"> Provide intimate small-scale landscape courtyards as surprises. Incorporate open/public-spaces into private developments Green Dog Parks Some neighbors don't want "Rain Tree" pocket Park 	<p>SUMMARY</p> <p>Small parks and landscape courtyards should be incorporated into all new developments along the river.</p>
<p>4.4 How should buildings relate to the street and Riverwalk (arcades, green space, etc.) along the length of the river?</p> <ul style="list-style-type: none"> Step towers back from river Buildings should open to the river Create stepbacks / scale townhouses Step down terraces in restaurants 	<p>SUMMARY</p> <p>Only a few answers here. Step backs and terraces on restaurants were a few ideas.</p>
<p>4.5 Where should retail, restaurant, and other active uses be located along the Riverwalk to encourage activity and increase safety? How can the design and planning of the Riverwalk and surrounding buildings enhance public safety and encourage both day and evening activity?</p> <ul style="list-style-type: none"> A Business Improvement District (BID) like the Beach that will allow for "Ambassadors" for security and tourist information. Active use along the river does not necessarily mean limitation of certain use, certain use may have marketability issue in the short run, especially at infancy stage due to lack of exposure when critical mass is not established. The Miami River Walk Commission has established River Walk Design Guide lines that all developments along the river have to be designed with specific zones: public promenade zone, semi public transitional zone with intimate seating, and non-obtrusive landscape buffer zone that provide transition for privacy in the 	<p>SUMMARY</p> <p>A few people mentioned here that shops under and around the bridge would be a good idea. A Business Improvement District was brought up as a way to help secure the area and provide tourists with information.</p>

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<ul style="list-style-type: none"> case of residential use, and opportunity of interaction in the case of public use. Either use would provide natural surveillance for safety. Market reality is a chicken and egg issue, I have been involved in projects like in the Brickell area of Miami, with the best of intentions, while the City required liner units and ground floor retail use, those spaces stay vacant after they were built. The vacant spaces actually became a deterrent for pedestrian because they gave an impression of an unsafe area due to lack of natural surveillance. Retail under bridge is good idea Decent vendors along Riverwalk 	
<p>4.6 What other environmental concerns may shape the future of riverfront open spaces?</p> <ul style="list-style-type: none"> A plan for cleaning the waterways quickly of trash, which is likely to happen with an increase in usage. Replace trees damaged in hurricane near Riverhouse Restaurant Increased Maritime activity is good for economy, but harmful to environment <p>Etc.</p> <ul style="list-style-type: none"> Strong capitol improvement plan for park maintenance and general maintenance of the proposed changes. Shadow ordinance on site in front of Jail Playground near MODS More upscale Dining/Jazz clubs 	<p>SUMMARY</p> <p>Keeping the area clean will bring more people to the area.</p>
<p>Theme 5: Connections</p>	
<p>5.1 What are the best ways of linking the north and south sides of the river for pedestrians? How important is this to the future of the city? Where should these connections occur?</p> <ul style="list-style-type: none"> The loop is a key component, whether it is through the use of Water Taxi, or overhead bridge without clogging boat traffic. Any pedestrian bridge that has to be raised/operated to enable boat traffic would require additional personnel whereas the strategic location of the new pedestrian bridges in line of sight to the existing bridge tenders may be possible so that they operate in tandem. Two pedestrian bridges (Arts area and Las Olas Area) Regular intervals for North-South connections via ferry taxi Walkway / Bikeway options at-grade need to be provided 	<p>SUMMARY</p> <p>Two pedestrian bridges were talked about here (Arts area and Las Olas area). The water taxi and ferry were also brought up again as ideas.</p>
<p>5.2 How can the currently disconnected areas of Las Olas Boulevard, Himmarshee Village, the Judicial Campus, and the Arts & Entertainment District be united and integrated into a single walking experience?</p> <ul style="list-style-type: none"> Connect via river Create mix use connection areas, walk able and bike friendly 	<p>SUMMARY</p> <p>Create mixed-use areas that are pedestrian and bike friendly.</p>
<p>5.3 How can the near neighborhoods, such as Rio Vista, Tarpon River, Sailboat Bend, Beverly Heights, and Flagler Village have better pedestrian access to Downtown and to the Riverwalk and its activities?</p>	<p>SUMMARY</p>

<ul style="list-style-type: none"> Difficult streets to cross, need more obvious pedestrian paths to river destinations Need water taxi stops (reduces need for parking, vehicular traffic into downtown) Pedestrian bridge would help connect Rio Vista Riverwalk and activating the river as a wonderful experience to connect people from adjacent neighborhoods 	<p>Water taxi brought up again. A pedestrian bridge would help connect Rio Vista.</p>
<p>5.4 Where should bike lanes and trails be located to encourage their use?</p> <ul style="list-style-type: none"> Locate on FEC ROW/Greenway 	<p>SUMMARY</p>
<p>5.5 What are the potential benefits of a north-south greenway along the existing Florida East Coast (FEC) railway?</p> <ul style="list-style-type: none"> Bike trail <p>Etc.</p> <ul style="list-style-type: none"> Weather is a concern. Find way to entice the pedestrian through protection from the sun and rain. Don't forget Flagler Village 	<p>SUMMARY</p>
<p>Theme 6: Tarpon River neighborhood</p>	
<p>6.1 How can potential large-scale developments along the river transition to urban neighborhood scale?</p> <ul style="list-style-type: none"> Allow neighborhood stakeholders to develop their own vision for area Townhouses with pedestrian access and trees Improve signage Provide for mid-rise transition development to the river 	<p>SUMMARY</p> <p>An idea was to have neighborhood stakeholders develop their own vision for the area. Townhouses with pedestrian access are another idea that was brought up by a few people.</p>
<p>6.2 How can existing neighborhood character be balanced with development opportunities?</p> <ul style="list-style-type: none"> It is difficult to define neighborhood characteristics due to the constant change. Keep / Improve Pedestrian access to waterway Make is safe. Lighting important Add landscaping / hanging planters 	<p>SUMMARY</p> <p>Aesthetic qualities are mostly what were brought up here.</p>
<p>6.3 What are the retail and amenity needs for the neighborhood?</p> <ul style="list-style-type: none"> Discourage "clubs" that stay open past 2am Upscale coffee shops Art store, small restaurants Whole Foods market Dry Cleaners Deli 	<p>SUMMARY</p> <p>Whole foods market and a deli were ideas brought up by a few. Coffee shops were popular as well.</p>
<p>6.4 What kinds of streets and landscapes are most appropriate for the neighborhood and for pedestrians?</p> <ul style="list-style-type: none"> Colorful banners, signage, sidewalks Add, improve and widen sidewalks Add traffic calming devices Lighting!! 	<p>SUMMARY</p> <p>Traffic calming appeared to be a big issue. Anything to slow traffic for pedestrian safety.</p>

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<ul style="list-style-type: none"> Tree lined streets 	
<p>6.5 What are the open space opportunities for the neighborhood? What types of open spaces best serve the community (trails, active, passive, playgrounds, etc.)?</p> <ul style="list-style-type: none"> 6th Avenue ROW to become park (Connect to Harding Park) <p>Etc.</p> <ul style="list-style-type: none"> Public Transportation is key. Himarshee Noise Ordinance Create a Railroad quiet zone Walkway on South Side to get across tracks Make Railroad Bridge look more appealing (Art) 	<p>SUMMARY</p>
<p>Theme 7: Architecture & Design</p>	
<p>7.1 How can new buildings be more environmentally friendly? How can buildings and open spaces specifically take advantage of the South Florida climate?</p> <ul style="list-style-type: none"> Provide development incentives to encourage LEED certified design. More innovative glass design buildings Design should depend on size of parcel. One size doesn't fit all 	<p style="text-align: center;">SUMMARY</p> <p>Building design as a way to be more environmentally friendly.</p>
<p>7.2 Where should architectural excellence be most encouraged? What are the most important architectural qualities to encourage (skyline drama, street level experience, quality of materials, etc.)?</p> <ul style="list-style-type: none"> Transition of buildings Active building side to face river arcades 	<p style="text-align: center;">SUMMARY</p> <p>Active side of building to face river was brought up.</p>
<p>7.3 What should the design image of the Riverwalk and surrounding architecture be?</p> <ul style="list-style-type: none"> <i>While Architectural style is a very subjective matter of personal taste, most of the readily recognizable skylines of the cities in the world are made up with a diversity of design styles. In my opinion, there is no one architectural style or form that would fit all conditions while meeting the functional needs of the users for which a building serves.</i> Establish a Riverwalk Design Guideline and set back for future development. New buildings should be compatible with existing buildings and natural design 	<p style="text-align: center;">SUMMARY</p> <p>Establish guidelines for future development. New buildings should be compatible with existing.</p>
<p>7.4 What types of building forms and configurations (scale, massing, orientation of towers, parking placement, etc.) are most conducive to creating a pedestrian-friendly Riverwalk experience?</p> <ul style="list-style-type: none"> Double story retail buildings 	<p>SUMMARY</p>

<p>General Comments/Miscellaneous</p>	
<p>Signage</p> <ul style="list-style-type: none"> Strong signage program that defines and directs the public to the different areas. These signs could be decorative. Signage should be friendly and welcoming Signage should represent the diverse areas in which they are placed. In front of jail 	
<p>Boundary</p> <ul style="list-style-type: none"> Expand study and connectivity area beyond Las Olas and the New River, in consideration with future Broward east-west corridor and the Judicial Complex. 	
<p>Public Facilities</p> <ul style="list-style-type: none"> There may need to be some thought put into public facilities (bathrooms, information centers, police substations) as there is a large demographic of people who plan there walking trips around where they can go to the bathroom. 	
<p>Public Land</p> <ul style="list-style-type: none"> Is there an inventory in the masterplan map that can indicate private/public ownership as well as any public access easements? This may help in developing some public "nodes" that the City can begin designing/incorporating now. 	
<p>Transit</p> <ul style="list-style-type: none"> Don't wrap buses with commercial ads, it reduces visibility inside the buses and appears less safe 	

APPENDIX B: MARKET STUDY (EXCERPT: EXECUTIVE SUMMARY)

RESTAURANT, RETAIL & ENTERTAINMENT MARKET STUDY DOWNTOWN – RIVERWALK FORT LAUDERDALE, FLORIDA

**PREPARED FOR:
BEYER BLINDER BELL AND
THE CITY OF FORT LAUDERDALE
FORT LAUDERDALE, FLORIDA
MARCH 2008**

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

SECTION II

EXECUTIVE SUMMARY

The focus of this market feasibility study has been on the demand for restaurants, retail, and entertainment facilities in the New River Master Plan area in Downtown Fort Lauderdale's Riverwalk. The area covers approximately one mile along both sides of the New River in Downtown Fort Lauderdale. The Goals developed by planners from Beyer Blinder Bell for the Las Olas & Riverwalk Corridor are:

- Strengthen the Las Olas Corridor
- Complete the Riverwalk Corridor
- Connect the North and South sides of the Riverwalk
- Better connect the Riverwalk and the Las Olas Corridor
- Reduce Pollution of the New River
- Improve the quality of existing parks and public spaces
- Encourage the creation of new Downtown parks and public spaces
- Link parks and open spaces with connecting recreational and pedestrian trails
- Encourage and strengthen Special Use Districts

We recognize the importance of the goals that should guide the Riverwalk area *Visions*, including: ways to encourage daily activity for locals and visitors; allow for a variety of experiences; improve and strengthen links to surrounding areas; envision the New River Riverwalk as a generator; and finally, insure the long term viability of the Riverwalk and its importance to Fort Lauderdale and the Downtown Area.

In addition, the Plan identifies five geographic character areas to strengthen the identities of different parts of the Riverwalk. One area in particular is intended to be the City's destination restaurant/retail/entertainment hub with development in this area "influencing and responding to redevelopment on the opposite side of the New River in a single, coherent concept to define an intense, central, river-oriented destination". This market study provides specific recommendations for this segment along the river.

We have evaluated the market feasibility opportunity to serve the residents, seasonal visitors, shoppers, Downtown employees, the judicial area, the cultural concentrations, weekly guests, hotel occupants, and international visitors. Our findings, conclusions, and recommendations are presented in this section of the report.

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

GENERAL FINDINGS

■ **The Economy of the United States is Slowing**

The U.S. economy has been slowing; the result of financial markets turmoil, declining housing demand, and slowing retail sales. By many standards, we are in a recession. We expect the adjustment to be short-term with demand improving within three years. It will take that time to absorb the existing inventory. Housing demand and absorption creates employment, increases the need for new commercial facilities, and attracts more national and foreign visitors. Currently, the lower value of the dollar in relation to other currencies has made U.S. real estate more appealing and affordable to foreigners, somewhat offsetting the current weak demand. Furthermore, more baby boomers are retiring and coming to Florida for their piece of paradise. History indicates that following an economic adjustment, demand in Florida flourishes.

■ **Fort Lauderdale's Economy as been Impacted by the Housing Decline**

Discussions with builders, restaurateurs, retailers, entertainment operators, hotel operators, and others during the course of this study indicates that Fort Lauderdale, like the rest of Florida and the Nation, has seen its economy slow down with fewer seasonal residents, visitors, housing sales, slowing retail sales, and flat to declining restaurant sales.

■ **Greater Fort Lauderdale**

Greater Fort Lauderdale has a current population amounting to over 1,794,000 people. The labor force exceeds 877,000 persons. The area usually generates over 10 million visitors who spend over \$9.0 billion annually. With over 600 meetings and conventions, the area has approximately 557 hotels, which along with rental condominium units, provide over 12 million visitor room-nights per year. With room occupancy at approximately 71 percent, occupied room nights approximate 8.9 million rooms. Additionally, there are over 50 cruise ships generating over 3.3 million passengers. There are also more than 2.15 million international visitors. Finally, Fort Lauderdale/Hollywood International Airport handles over 22 million passengers. In order to meet this demand, there are over 4,100 restaurants, 12 malls, 56 golf courses, 580 tennis courts, 100 boatyards and marinas, and 14 museums.

■ **City of Fort Lauderdale's Retail and Foodservice Sales**

The 2002 Economic Census⁷ of Retail Trade and Foodservice (latest Census data available) indicates that the combined Retail and Foodservice sales in the City of Fort Lauderdale on an annual basis amounted to approximately \$3.7 billion. Retail sales accounted for \$3.22 billion and Foodservice including restaurants and quick service food facilities accounted for \$453 million. Currently, we estimate that the City of Fort Lauderdale's retail and foodservice sales amount to an estimated \$4.9 billion composed of retail sales of \$4.3 billion and foodservice sales of approximately \$600 million.

■ **Downtown Fort Lauderdale Revenues**

Downtown Fort Lauderdale has over 1.0 million square feet of restaurant, retail, and entertainment space, along with cultural facilities generating, in our opinion, over \$360,000,000 in sales and revenues annually. Starting in 2007, sales have gone flat and even

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have declined somewhat. The best known portion of these facilities can be found along the Las Olas shopping and dining area.

■ **Downtown Fort Lauderdale's Activities**

Downtown Fort Lauderdale provides a myriad of activities and attractions including museums, performing arts, cinemas, shopping, dining, government, employment, hotels, marinas, boat traffic, river taxi's, sightseeing, tour boats, and other interesting venues for residents and visitors alike.

CONCLUSIONS

■ **The Downtown New River Master Plan**

There will be a growing market for the types of public spaces and activities as envisioned by the Downtown New River Master Plan, which should be implemented on both sides of the New River. Implementation will provide Fort Lauderdale with a major attraction for both locals and visitors. Short term reduction in housing demand will slow the program. However, the market will be stronger as condominium construction resumes in several years.

The Downtown New River Master Plan is focused on locals and visitors of all ages, incomes, and ethnic groups as a gathering and activity concentration along the New River from the Center for Performing Arts to the Las Olas shopping district. With the proposed Master Plan improvements, which anticipate interconnectivity between both sides of the River including the public parks, the museums, the performing arts center, riverfront attractions, the shopping district, the office and financial area, theaters, restaurants, retail shops, entertainment venues, parking, parks, the Judicial complex, and other attractions for both locals and visitors, the Downtown area truly becomes a "place to visit" daily not just for special events.

■ **Marine Activity**

The New River boat traffic is an attraction by itself. People migrate toward water and boat activity, along with seeing the raising and lowering of bridges, varying types of watercraft, and the ability to see it all while taking advantage of the Riverwalk.

■ **Las Olas Shopping and Dining District**

The Las Olas shopping and dining district is also known by visitors as Fort Lauderdale's Rodeo Drive (Beverly Hills, California). Las Olas directly connects the beaches and the nearby residents with Downtown Fort Lauderdale and features a major concentration of upscale shopping and dining. The shopping and dining area should be protected, enhanced, and promoted to locals and tourists alike. Moreover, Las Olas should be integrated to the Riverwalk to provide a more complete, richer experience at this important Downtown New River Location.

■ **Downtown Fort Lauderdale's Accessibility**

Downtown Fort Lauderdale enjoys excellent access to Fort Lauderdale residents, Downtown occupants, area visitors, seasonal residents, office employment, the legal and judicial profession, boaters, marinas, conventioners, international travelers, and numerous others. U.S. Highway 1 (Federal Highway) provides north-south access to the Downtown Area from

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

the surrounding residential areas. In addition, the following thoroughfares provide access from regions beyond the immediate vicinity:

U.S. Highway 1 junctions with Interstate 595 approximately 2.5 miles to the south. Interstate 595 commences at U.S. Highway 1 and extends westerly through the Fort Lauderdale area to become Interstate 75. Interstate 75 is known as “Alligator Alley” across the Everglades to the west coast of Florida where it turns northward through the country to its terminus at the Canadian/Michigan border at Sault Ste. Maria.

Broward Boulevard extends from Downtown Fort Lauderdale to Interstate 95, approximately 1.5 miles to the west. Interstate 95 is a north-south highway extending through the State of Florida and throughout the East Coast of the United States.

Andrews Avenue is also a major north-south traffic artery which extends from Downtown Fort Lauderdale across the New River to SW 24th Street (Florida 84). To the north, Andrews Avenue extends to Atlantic Boulevard (Florida 814), approximately 7.8 miles. Linking the North and South sides of the New River could attract people from the South Andrews Avenue corridor, an area that is also currently undergoing Master Planning efforts.

While the highway and street grid provides direct vehicular access to Downtown Fort Lauderdale, the City generally lacks a convenient and consistent public transportation network that provides circulation within the Downtown area.

■ **Walking Time Analysis**

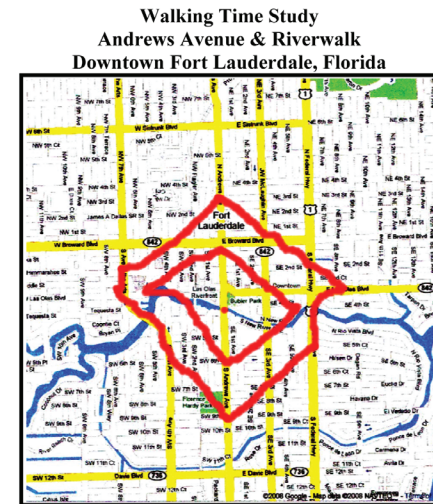
We undertook a Walking Time Study for 10 minutes by 5 minute intervals. The objective was to simulate distances that locals and visitors alike might achieve walking in the Downtown Area. We started the Walking Time Study at the Andrews Avenue Bridge over the New River and walked 5 and 10 minutes in all directions. The results are depicted in **Figure 2.A**. The 5-minute walking times are the closest to the bridge, while the 10-minute walking times are the furthest (shown in red).

The map indicates that one can generally reach almost to Broward Boulevard to the north in five minutes and SE 4th Avenue to the east using the Riverwalk. To the west one can reach SW 4th Avenue in five minutes and to the south one can reach SW 6th Street. Within 10 minutes walking north on Andrews Avenue, one can generally reach NW or NE 3rd Street. To the east in 10 minutes, one can generally reach SE 5th Avenue, and walking west in the same time one can generally reach NW 7th Avenue. Walking south for 10 minutes from the Andrews Bridge over the New River, one can generally reach SW 10th Street.

While the walking public cannot solely support dining and retail activity, pedestrians will be an integral part of Riverwalk’s success, and thus, it is imperative that the streets leading to the New River be active and pedestrian friendly as defined in the New River Master Plan.

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Figure 2.A



■ **Driving Time Analysis**

A Driving Time Analysis was conducted from Las Olas Boulevard and Andrews Avenue in Downtown Fort Lauderdale in all directions for 15 minutes at 5-minute intervals. The Driving Time Analysis assists in the delineation of the Trade Area by simulating the distances a consumer can travel during given time allocations. **Figure 2.B** on the following page depicts 5, 10, and 15-minute driving times. The data show that one can generally reach NW 15th Street driving north for five minutes on Andrews Avenue. Conversely, one can reach approximately SW 26th Street driving five minutes south on Andrews Avenue. East bound on Las Olas Boulevard, one can usually reach the Barrier Island just east of the Intracoastal Waterway within five minutes. West bound Broward Boulevard from Andrews Avenue, one can generally reach just beyond Interstate 95 in five minutes.

However, as short as these distances are, it is important to recognize that the Riverwalk and Downtown in general could benefit from an integrated transit system, providing the primary and secondary trade area, as defined later in this document, with additional methods for accessing the Riverwalk area.

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

Figure 2.B

15-Minute Driving Time
Andrews Avenue & Las Olas Boulevard
Fort Lauderdale, Florida



The base map also depicts 2007 estimated average household income. The darker the color green, the higher the income. Conversely, the lower the average household income the lighter the color. A legend may be found in the lower left-hand corner of the map.

■ **Downtown Fort Lauderdale Resident Trade Area**

The trade area of Downtown Fort Lauderdale, including Las Olas Boulevard and the Riverwalk has been delineated on the basis of restaurant, retail, and entertainment attraction, as well as accessibility, driving times, generative facilities, existing and proposed competition, present and future demographics, downtown employment, physical and psychological barriers, shopping and dining patterns, and our experience in evaluating retailing, dining, and shopping centers throughout the world.

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The Resident Trade Areas reflect the defined geographic areas from which approximately 70 percent of the sales will be derived. The balance will come from the other levels of business such as Downtown employees, hotel occupants, seasonal residents, and domestic and international visitors. Each of these levels of business will be discussed later in this section.

We have delineated the **Primary Trade Area** as within 3 miles of the Downtown New River area. The Primary Trade Area is that geographic area from which the most frequent costumers will originate.

The **Secondary Trade Area** has been designated as between 3 and 5 miles from the Downtown New River area. These residents are important customers who come frequently, but who will find the location a little less convenient on a day-to-day basis. However, as the Riverwalk is expanded, they should increase their frequency of visits, especially for dining and entertainment.

Finally, the **Tertiary Trade Area** has been designated as beyond 5 miles but within 15 minutes driving time of the Downtown New River area. This essentially includes more of the beach area residents who have higher incomes, eat out often, and are currently focused upon Las Olas Boulevard.

Based upon this evaluation we have established the Downtown Fort Lauderdale Resident Trade Area boundaries as depicted in *Figure 2.C* on the following page. Trade Area demographic data was compiled for the resident population and forecast to 2012 and 2015.

■ **Trade Area Demographics**

The Primary Trade Area (3-Miles) contained 128,416 persons in 2000. The 2007 population is estimated at 141,725 persons and forecast to 148,681 persons in 2012. By 2015, population of the Primary Trade Area is expected to increase to 159,089 persons.

The Secondary Trade Area (3-Miles, but within 5-Miles) had a 2000 population of 146,525 persons, which has been estimated at 157,962 persons in 2007. In 2012, the population of this defined area is forecast to be 166,454 persons and in 2015, the population is forecast to increase to 176,857 persons. On a combined basis, with a 5-Mile radius there currently are approximately 299,687 persons.

The Tertiary Trade Area (beyond 5-Miles, but within 15 minutes) in 2000 contained 77,974 persons. In 2007, the population of the Tertiary Trade Area had an estimated population of 82,824 persons. By 2012, the population is forecast to increase to 86,463 persons and by 2015 to 91,175 persons.

The Total Trade Area (including the Primary, Secondary, and Tertiary Trade areas) will have an estimated 2012 population of 403,615 persons. By 2015, the total population is forecast to 427,121 persons.

APPENDIX B: MARKET STUDY

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Age

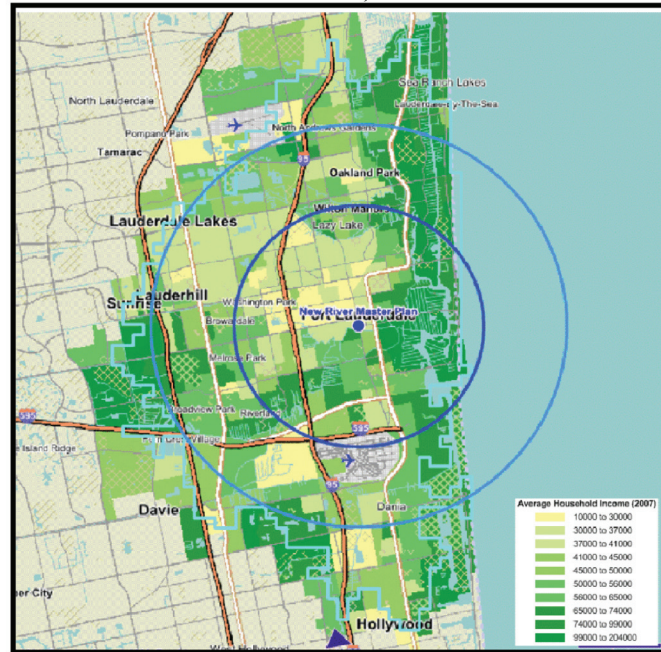
The median age within the Primary Trade Area in 2007 was estimated at 38.4 years. The Secondary Trade Area's median age in 2007 was 38.5 years. The Tertiary Trade Area had an estimated median age of 39.4 years.

Income

In the Primary Trade Area, the average household income in 2007 was estimated at \$70,141. The Secondary Trade Area had an estimated 2007 average household income of \$60,006. The average household income in the Tertiary Trade Area was estimated at \$66,981. The base map reflects average household income. The darker the color green; the higher the income. A legend is provided in the lower right-hand corner of the map.

Figure 2.C

Downtown Fort Lauderdale Trade Area
Fort Lauderdale, Florida



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- **Downtown Fort Lauderdale Resident Trade Area Personal Consumption Expenditures**
Downtown Fort Lauderdale's Resident Trade Area Personal Consumption Expenditures have been determined and forecast to 2012, and 2015. The data as shown in Table 2.1 show the expenditures for each Trade Area segment.

Table 2.1

Personal Consumption Expenditures
Downtown Fort Lauderdale's Resident Trade Area
2007, 2012, and 2015

Trade Area Segment	Personal Consumption Expenditures	Personal Consumption Expenditures	Personal Consumption Expenditures
	2007	2012	2015
Downtown Fort Lauderdale Riverwalk			
Primary Trade Area	\$1,846,251,575	\$2,107,701,856	\$2,461,265,919
Secondary Trade Area	\$2,035,763,904	\$2,341,009,056	\$2,725,012,656
Tertiary Trade Area	\$1,179,072,748	\$1,213,075,890	\$1,401,177,400
Total Trade Area	\$5,061,088,227	\$5,661,786,802	\$6,587,455,975

Source: Melaniphy & Associates, Inc., 2008

- **Table 2.2** on the following page presents our estimate of sales and revenues generated by Downtown Fort Lauderdale restaurants, retail, entertainment, cultural, and ancillary facilities. **Overall, we estimate that Downtown Fort Lauderdale is capturing over \$360,000,000 annually, or approximately 7.1 percent of the market potential.** Some of the contributing elements are as follows:

- **Trade Area Residents**

We have determined that local Trade Area Residents spent an estimated \$150,000,000 in Downtown Fort Lauderdale in 2007. In Section IV of this report, we provide the retail, restaurant, and entertainment categories and their estimated sales and market share of Personal Consumption Expenditures.

- **Seasonal Housing Units**

There are a significant number of housing units that have been purchased, but utilized only for short periods annually. These are classified as vacant by the Census Bureau. Nevertheless, they represent both unsold units and seasonal visitors who have a major impact upon the economy. Within the Primary Trade Area, there are an estimated 10,093 vacant units, most of which are owned and used seasonally. Within the Secondary Trade Area, there are an additional estimated 9,693 units, and within the Tertiary Trade Area there are an estimated 6,487 units. Approximately 10 percent of the units are either unsold or owned by investors. In the entire Trade Area, there are a total of 26,273 vacant units, of which approximately 24,000 are owned by people residing elsewhere permanently and used seasonally. We estimate that seasonal visitors in Fort Lauderdale are contributing approximately \$40,000,000 to overall sales and revenues.

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A shift has been taking place with seasonal units being converted to permanent residences as the “Baby Boomers” reach retirement age. Many had purchased units earlier for retirement purposes. This trend has been experienced throughout Florida, Arizona, and Nevada. Furthermore, we expect an increase in foreigners purchasing housing units, principally condominiums, as investments because of the decline in the value of the U.S. Dollar.

Table 2.2

**Estimated Sales and Revenues
Downtown Fort Lauderdale
Estimated Source of Expenditures
2007**

Downtown Sales Sources	Total	2007 Estimated Downtown Retail, Restaurant and Entertainment Sales & Revenues
Trade Area Residents' Purchases		\$150,000,000
Seasonal Non-Residents +family visitors	\$220,693,200	\$40,000,000
Downtown Employment:		
Office	30,000	
Retail/hospitality	1,750	
Broward General	2,400	
Total	34,150	\$30,000,000
Hotel Occupants		\$25,000,000
Other Domestic/International Visitor spending:		
Shopping	\$1,771,477,000	\$25,000,000
Dining	\$2,367,800,000	\$30,000,000
Entertainment	\$955,896,000	\$10,000,000
Museums and Performing Arts Visitors		\$50,000,000
Museum of Art	700,000	
Center for Performing Arts	600,000	
Sunrise Cinemas	400,000	
Museum of Discovery & Science	400,000	
	2,100,000	
Total Estimated Sales		\$360,000,000

Source: Melaniphy & Associates, Inc., 2008

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□ Downtown Employment – Retail and Luncheon Activity

Downtown Fort Lauderdale has a total of 5,740,044 square feet of office space in the fourth quarter of 2007 of which 916,104 was vacant, or 16.0 percent. Occupied space amounted to 4,823,940 square feet. Downtown Office employment is estimated at 33,300 employees which covers office, retail, hospitality, and medical employment. Some lunch and retail expenditures, in our opinion, amount to an estimated \$30,000,000.

□ Hotel Occupancy and Visitor Expenditures

Fort Lauderdale hotel occupancy has remained above 65 percent since 2000. In 2007, hotel occupancy was estimated at approximately 71 percent. In 2006, hotel occupancy stood at 73.5 percent and at 73.4 percent in 2004. Average room revenue for occupied rooms in 2006 amounted to \$64.49, up over 2005's average of \$60.14. We have estimated 2007 average room revenue at approximately \$65.00.

The 557 hotel properties provided approximately 33,428 rooms. Thus, there were 12,201,222 available room nights in Greater Fort Lauderdale. Given occupancy of approximately 71 percent, there were 8,662,866 occupied room nights. Spending for dining and shopping are estimated at \$25,000,000 annually.

□ Museums and Other Visitors

Downtown museums generate over 2,100,000 visitors annually based upon data provided. Museums and the Performing Arts visitors, in our opinion, contribute an estimated \$50,000,000 to the Downtown area.

□ Other Domestic and International Visitor Expenditures

Domestic visitors to the Greater Fort Lauderdale area were estimated at 8,022,700 in 2005 and 8,200,000 in 2006. Because of rising gasoline prices, we estimate that Domestic visitors declined slightly in 2007 to 8,175,000 (current data not available). In 2006, Domestic visitors spent an estimated \$1.5 billion on shopping in the Greater Fort Lauderdale Area. This was a \$30 million increase over 2005. Diners spent an estimated \$1.9 billion in 2006 and visitors spent an estimated \$757 million on entertainment.

International visitors in 2005 were estimated by the Convention and Visitors Bureau at 2,118,000 visitors, which in 2006 were estimated at 2,150,000. In 2007, we estimate that the number was about the same or approximately 2,125,000 visitors. International visitors spent an estimated \$378 million on shopping and \$482 million on dining. Entertainment recorded revenues of an estimated \$199 million. We estimate that domestic and international visitors spend an estimated \$65,000,000 in Downtown Fort Lauderdale.

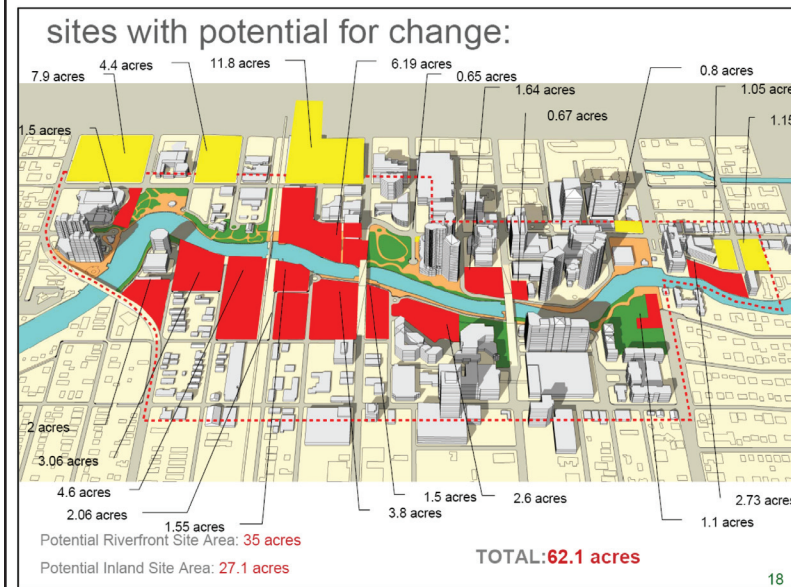
APPENDIX B: MARKET STUDY

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

RIVERWALK OVERALL RECOMMENDATIONS

Figure 2.D depicts the sites and acreages with potential for change as identified for the overall New River Master Plan study area, prepared by Beyer Blinder Bell. The sites indicated in red are potential riverfront development sites. Our overall recommendations for the Riverwalk area are as follows:

Figure 2.D



Source: Beyer, Blinder, Belle, 2008

1. **There will be a feasible market for restaurant, retail, and entertainment facilities on the Riverwalk when the Fort Lauderdale economy recovers.**

The north side of New River has a concentration of office space, financial entities, government agencies, museums, performing arts, shopping, dining, hotels, condominiums, river taxi service, and tour boats. Given current economic conditions, the north side will probably take 6 to 10 years to develop as envisioned by the Master Plan. The south side Riverwalk market will take longer because it has fewer critical attractions, principally the Judicial District. The south side will, in our opinion, take 8 to 12 years to fully redevelop the available properties. As new projects are proposed, it will be imperative to require

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

active uses along the Riverwalk. The amount and type of defined commercial space should be provided at ground level along the Riverwalk, as defined in Number 3 below.

2. **The Riverfront development sites identified in Figure 2.D should generate between 450,000 and 600,000 square feet of commercial space when fully redeveloped.**

The 14 identified development sites have a total of approximately 35 acres on both sides of the New River in the Downtown New River Master Plan study area. Two of the larger sites have been designated as "Hub" areas for larger development. All should be required to provide commercial space for restaurants, retail, and entertainment space at the ground level along the Riverwalk. Total retail, restaurant, and entertainment space should range between 500,000 and 600,000 square feet for Riverwalk sites located within the Downtown New River Master Plan area. This will be necessary to create sufficient critical mass and activity to successfully realize the Master Plan vision.

3. **Developments within the two Destination Hub Areas identified in the Downtown New River Master Plan should have a 20 percent restaurant/retail/entertainment space requirement.**

By our definition, there are two destination "Hubs" within the restaurant/retail/entertainment character area as presented in the New River Master Plan. In our opinion, all developments within these hubs should be subject to a 20 percent commercial regulation. Specifically, 20 percent of the building size by square footage (excluding parking) should be designated as restaurant, retail, and entertainment space. Furthermore, the commercial space must be located at the ground level along the Riverwalk

- The **North Hub** includes the area bounded by SE 2nd Street, Andrews Avenue, New River, and the FEC Railroad Bridge. Because of the significant area size and its strategic Downtown central location, developments with at least 1,000,000 square feet of mixed-use gross building area (excluding parking) should be created in this area with 20 percent of the building area devoted to restaurant, retail, and entertainment uses primarily along the Riverwalk. Developments proposed with less than 1,000,000 square feet should have an *absolute minimum* of 150,000 square feet of retail/restaurant space focused on the Riverwalk. When completed, this site should be the major north side restaurant/retail/entertainment generator on the Riverwalk. We envision a multi-level restaurant, retail, and entertainment complex connected to other similar, but smaller concentrations of active spaces along the remainder of the Riverwalk.

- The **South Hub** includes the properties bounded by the New River, Andrews Avenue, SW 5th Street, and the FEC Railroad Bridge. This total area includes three sites of 3.8 acres, 1.55 acres and 2.06 acres or a total of approximately 7.41 acres. At the very minimum the 3.8 acres and the 1.55 acres each have frontage on the New River and should either be developed jointly or individually. These sites should provide 20 percent of their overall square footage to restaurant/retail/entertainment space, or a minimum of 150,000 square feet.

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

4. **Fort Lauderdale building regulations should require that all other new Riverwalk buildings should have a minimum of 10 percent commercial space or 15,000 square feet, which ever is greater.**

The regulations should require that each property with a new building fronting on either side of the New River between NW 7th Avenue (SW 4th Avenue) and Federal Highway (U.S. Highway 1) should devote a **minimum of 15,000 square feet or 10 percent of their total building square footage which ever is greater to retail, restaurants, and entertainment uses at the ground level fronting on the Riverwalk**, with the exception of the two “Hub” sites located within the Downtown New River Master Plan area. (As described later). For example, if a condominium building has a total of 400,000 square feet, then the retail space allocation should be 40,000 square feet for restaurants, retail, and entertainment uses. However, since the minimum is 15,000 square feet, buildings less than 150,000 square feet would still be required to add 15,000 square feet of commercial space. Each property developer should have the option to increase the allocation, if desired. However, the minimum should be enforced.

5. **The Las Olas and Performing Arts Center “Gateway” Areas should provide restaurant space along the Riverwalk.**

The Riverside Hotel site contains 2.73 acres on the north side of the New River, which includes the existing parking deck fronting on the New River. The Performing Arts Center site contains approximately 1.5 acres, which directly abuts Esplanade Park.

To anchor the east and west “Gateways” of the Riverwalk district, and further connect the Riverwalk to the rest of Downtown Fort Lauderdale, we recommend that a major restaurant and cocktail lounge with a minimum of 8,000 to 10,000 square feet (plus any banquet area) be provided at the Riverside Hotel riverfront site. We recommend a restaurant of 6,000 to 10,000 square feet (and perhaps some banquet space) be created on the Performing Arts site at the west Gateway.

6. **New riverfront condominiums should generally follow a restaurant/retail/entertainment size and location model.**

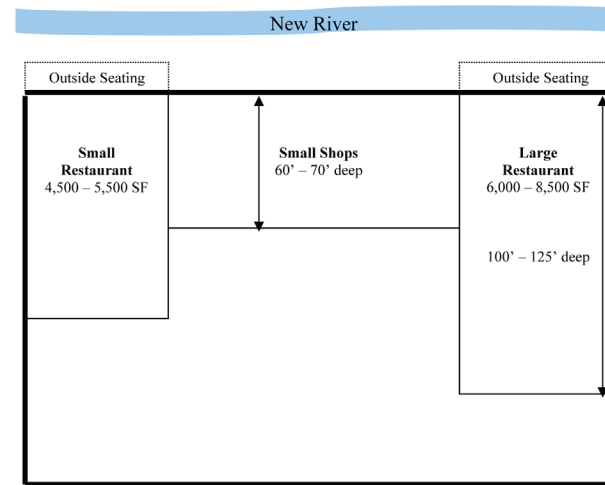
For the typical Riverwalk building site fronting on the New River, we recommend that a **minimum** requirement should be at least two restaurants included in the required 10 percent or 15,000 square feet, which ever is larger. One restaurant should be between 4,500 to 5,500 square feet and the other between 6,000 to 8,500 square feet. If they wish to designate more space, they should be permitted to do so. These are two popular restaurant size ranges. Restaurant sizes vary depending upon seating requirements, kitchen size, bar area or service bar area, waiting areas, and layouts.

The depth of the restaurant space should be at least 100 to 125 feet while the other retail space can have a depth of between 60 to 70 feet. The New River commercial frontage space should occupy the entire width of the building frontage along the Riverwalk. For example, if the building has 150 feet on the Riverwalk, the two restaurants might take up 100 feet of the frontage, while the retail shops, bars, or entertainment would take the additional 50 feet. The types of uses will vary depending upon the location and the extent of the Riverwalk pedestrian traffic in the immediate area.

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The typical size will range anywhere from a minimum of 15,000 square feet for smaller buildings to a minimum of 150,000 square feet (depending upon the frontage and location of the building) required for the two Hub sites. Buildings on major north-south streets should be required to have “wrap-around” the corner retail stores to capitalize on the major street frontage. The objective is to capture existing pedestrian traffic from these streets and connect people to the Riverwalk while serving the new building residents, businesses and employees in the immediate area, as well as visitors and tourists to Downtown Fort Lauderdale. *Figure 2.E* shows the model layout for a typical new condominium building with restaurant, retail, and entertainment space along the Riverwalk.

Figure 2.E
Restaurant/Retail/Entertainment Size and Location Model



7. **Temporary alternative uses of restaurant/retail/entertainment space should be permitted based on market conditions.**

It is possible that all of the allocated commercial space for restaurant/retail/entertainment may not be immediately utilized because of local market conditions. In that case, the buildings should be permitted to create “Flex-Space”, permitting the leasing of some of the space for office users for a period not to exceed five years from the date of receiving the building occupancy permit. This should be permitted only if the designated space has been designed for restaurant/retail/entertainment tenants including meeting all code requirements i.e. black iron kitchen ventilation, grease traps, appropriate ceiling heights, required plumbing connections, fire doors, sprinkler systems, service and delivery access, required parking spaces, and other appropriate code requirements.

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8. **The addition of restaurants/retail/entertainment space will accelerate Downtown New River condominium absorption.**

Studies have found that condominium buyers like the idea of restaurants and shops in buildings fronting on the water. Furthermore, it usually accelerates the condominium sale absorption period. Thus, there is a benefit to both buyer and developer. The developer can sell the total commercial space to an investor who then becomes responsible for leasing and management of the commercial space. In addition, as residency increases in the Downtown area, the demand for restaurant, retail, and entertainment uses will increase.

9. **Consider creating a Downtown New River taxing district. It might be appropriate to create some type of taxing district to assist in the development and growth of the Riverwalk and to provide upgraded security.** Also, it will be necessary to add more events and activities bringing more people to both sides of the River.

10. **Add more needed docking space on both sides of the New River.** There is a limit of temporary docking space along the New River. We recommend that any actions that will improve evening docking space be implemented to serve boating diners, as well as adding to the ambiance of water activity.

11. **Create a Riverwalk Management Program.** This can be accomplished by either having the Riverwalk managed by the City or by outsourcing Riverwalk management to a management and marketing professional or organization that can both manage and promote the Riverwalk as a local and tourist attraction.

12. **Restaurants or retailers might be added under the Andrews Avenue and 3rd Avenue Bridges.** In order to add additional attractions small vendors might be located “*under the bridges*” to provide additional opportunities for merchants. This will also assist in providing increased security and eyes on the New River. Lighting also needs to be improved. Bridge spaces should be undertaken only when a new building is being added nearby and there is additional foot traffic on the Riverwalk.

Should the program proceed, a set of “Rules & Regulations” will be required for occupancy, maintenance, sanitary, and housekeeping. Sewer, water, and power will be required depending upon the extent of the program. Shops might include restaurants, quick service food units, small antique items, souvenir shops, coin collections, moderately-priced and colorful jewelry, unusual and fun nautical items, magazine vendors, paperback books, knick-knacks, gift shops, soft drinks and snacks, T-Shirts shops, live musicians featuring scheduled appearances in varying musical venues, local artists showings, and many others. The value of the land under the bridges should be determined to establish an economic rent. There might be a need for some seasonal tables or booths during certain holidays or special events. Eventually, rents should rise as traffic and sales rise.

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

13. **Direct pedestrian river linkage needs to be created between both sides of the New River.**

The simplest solution, in our opinion, to the north-south river linkage would be the use of a free water taxi running at least every few minutes between the north side and south side Hubs of the New River. The City should negotiate an exclusive water taxi agreement that would include free and frequent water taxi service to both sides of the New River. This will, in our opinion, stimulate south side New River activity. The water taxi companies might also package the trip along with various sightseeing tours.

14. **Improved security should be implemented as new buildings are developed.** Security on the Riverwalk is essential. Local and visitors alike must feel comfortable and secure while walking either side of the Riverwalk. Also, because of less pedestrian traffic on the south side of the New River more awareness of security needs should be addressed. A Farmer’s Market on the south side of the New River will require added security.

15. **The City should encourage some of the existing buildings on both sides of the Riverwalk to add restaurant/retail/entertainment space.** This will create an array of active spaces along both sides of the River and help to connect to existing activities, including the Las Olas shopping and dining area. An inventory of vacant ground floor condominium space should be undertaken. Where adequate vacant space is available, property owners should be contacted regarding the addition of appropriate commercial space at existing ground level locations along the River. Some form of incentive or subsidy might be required to encourage the conversions.

RECOMMENDATIONS FOR THE NORTH SIDE OF THE NEW RIVER

16. **The north side of the Riverwalk should add more restaurants, quick service food units, entertainment, retail shops, and activities in both new and existing buildings.** This will improve the connectivity between Las Olas Boulevard and the museums and cultural activities in and around the Downtown area. The Riverside Hotel redevelopment will help to link the existing Riverwalk to Las Olas Boulevard. However, the Stranahan House’s New River frontage is a key parcel that also needs to participate in the program, completing the transition and providing an opportunity for passage by this important historic landmark. A smooth transition should permit visitors and locals alike to walk unimpeded from the Las Olas shopping and dining area to the Center for Performing Arts.

17. **The five properties fronting on the north side of the New River as identified in Figure 2.D should add between 250,000 and 300,000 square feet of restaurant/retail/entertainment space along the Riverwalk when developed.** The recent development proposal, on the site of the former Riverfront, would have been the largest development on the New River, featuring mixed-use of residential, office, hotel, restaurants, retail, and parking facilities. When the economy improves, we recommend that this site be designated within the North Hub site and maximized for development. In addition, any proposed public transit routes should locate a stop within the North Hub to provide direct access to this destination and help link riders to the Riverwalk location.

Restaurant, Retail, & Entertainment Market Study, Downtown New River Master Plan

Given the current housing market, it will probably take 6 to 10 years to develop the north side of the river in the study area.

In addition to this property, there are two sites on the north side of New River at the SE 3rd Avenue Bridge. The site on the northwest corner has approximately 1.64 acres; the northeast corner has approximately .67 acres. There is also a 1.5 acre site at the eastern end of the Riverwalk near the Performing Arts Center.

The Riverside Hotel has a 2.73 acre site on the New River behind the existing hotel. The owners are planning a major addition that will add rooms and other facilities to the riverfront area. We encourage them to consider operating a restaurant on the Riverwalk at their location and integrating it into the hotel pedestrian flow to and from the Riverwalk.

18. The North Hub should include mixed-use developments with a total of 220,000 to 280,000 square feet of restaurant/retail/entertainment space along with other block developments.

The North Hub site between the FEC Railroad Bridge and Andrews Avenue, the site of the current Riverfront development and the existing parking garage, in our opinion, should contain 220,000 to 280,000 square feet or 20 percent of the building(s) size which ever is greater. The restaurant/retail/entertainment space should be designed in a multi-level setting with the restaurants and retail at the ground level along the River and banquet facilities, night clubs, fitness center, and other entertainment and service stores should be place on the second level. The housing, office space, and hotel lobbies should be designed to maximize the flow of pedestrians through the retail/restaurant/entertainment areas. This location should include significant commercial space for downtown office and financial uses.

There should be at least four restaurants, along with bars, night clubs, retail shops, a black box theater, a fitness club, a gourmet grocery and wine shop, gifts and souvenir shops, and others retail uses. The major restaurants should overlook the River. One should be a major seafood restaurant seating (inside and out) at least 300 patrons, operated either by a well-known major independent or a major chain restaurant. We favor local independent restaurant operators because they are will be known by Fort Lauderdale residents. However, for the major North and South Development Hubs, it will be necessary to have a mix of both independent and chain restaurants and retailers that have name recognition to generate customers from a wide variety of local residents and domestic and foreign visitors. Equally as important, from the developers prospective, are the financeability of the project and the lenders degree of acceptable risk. It will be difficult, if not impossible, to successfully attract sufficient critical mass (square feet) to the project without some well-known chain specialty retailers. Las Olas already is already providing a collection of independent retailers and restaurants and they should be protected. Residents and visitors will be attracted to the Hub space if there is adequate restaurant and retail name recognition.

The North Hub development, which we expect to happen first, will face the highest degree of risk because it will be the initial major Riverwalk development. It is essential that it be successful and generative to set the stage for other developments along the Riverwalk.

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The North Hub restaurants should provide both inside and outside seating and be attractively lighted from the waterside. Both of these types of restaurants should generate sales of between \$5,000,000 and \$8,000,000 annually. The Riverwalk area near the restaurants should continue to be a place where tourists and locals congregate. Naturally, adequate parking and valet parking will be necessary. Retailers should be a mix of local independents and chain specialty stores to provide adequate attraction to the Hub developments.

The North Hub market will generally support the types of retail/restaurants shown in the table below.

Table 2.3

<u>Suggested Tenant Mix</u>	<u>Size</u>
Major seafood restaurant	10,000
Major restaurant	10,000
Specialty grocery/wine store/prepared foods	10,000
Night Clubs - 2nd floor	20,000
Retail and service shops	45,000
Restaurants & bars with inside/outside seating	20,000
Black box theater - upper floors	30,000
Fitness Club – 2 nd floor	25,000
Quick service food shops and seating	20,000
Service shops 1 st or 2 nd floors	10,000
Total	200,000

Restaurants/retail/entertainment facilities that are included in the new development should be located at the ground level along the River, including outdoor seating so that building occupants (residents, hotel visitors, and office occupants), along with locals and tourists are all a part of the dining and shopping experience. Shops might include one to four additional restaurants, gift shops, a florist, an optician with modish glasses, a gourmet/wine grocery store featuring prepared foods, a magazine/news shop, swimwear and beach gear shops, a Black Box cinema, one or two jewelry stores, a small drug store, a deli, a coffee kiosk, at least four to six quick service food shops, a fitness center, and others. Approximately, 200,000 square feet would be needed for just this development. A food court, oriented primarily to the office occupants might be blended into the commercial area to maximize the attraction. Access should probably be provided to SW 1st Avenue or SW 2nd Street to create traffic flow through the building to maximize local, building, and tourist traffic.

It should be pointed out that the other blocks in the North Hub could add an additional 30,000 to 50,000 square feet, especially the blocks fronting on Andrews Avenue. Thus, the total potential restaurant/retail/entertainment square footage in the North Hub might amount to between 220,000 and 280,000 square feet.

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The removal of the existing Riverfront development will eliminate approximately 30 restaurants, bars, retail shops, kiosks, and entertainment facilities. While many facilities are currently vacant, it nonetheless, continues to be a tourist attraction. Proposed new development should be designed to attract a variety of visitors to the Downtown area, and more specifically, to this future hub of activity and the rest of the Riverwalk area.

The previous Riverfront development was primarily oriented towards a specific population segment that focused on young people. To ensure long-term success, the new plan should focus on offering activities for all ages and types.

19. The Developers of the North Hub site might consider adding a public observation deck, a cocktail lounge and/or a restaurant on the top floor.

It would add to the variety of activities along the Riverwalk. Places that have successfully operated similar attractions for years include the 95th Restaurant & Cocktail Lounge atop the Hancock Building in Chicago, the 50th floor of the Bank of America building in San Francisco, the Windows of the World in New York which unfortunately was destroyed during 9/11, the Hyatt Regency in Dallas, and numerous others. Visitors can view the Las Olas shopping and dining district, the New River, the harbors, Port Everglades, the Fort Lauderdale International Airport, the Beaches, and the surrounding activity.

RECOMMENDATIONS FOR THE SOUTH SIDE OF THE RIVERWALK

20. The South Hub across the New River from the North Hub should include mixed-use developments with a total of 150,000 to 200,000 square feet of restaurant/retail/entertainment space along with other block development.

The South Hub site is located between the FEC Railroad Bridge and Andrews Avenue, extending south to SW 5th Street. This area should be developed at the 20 percent rule, or a minimum of 150,000 to 200,000 square feet. The South Hub contains two major sites fronting on the New River that contain a total of 5.35 acres. This should include independent and chain restaurants and a retail specialty shop mix somewhat different to that recommended for the North Hub of the New River. This will create an individual flavor for each side of the New River.

The South Hub does not have the large number of uses available as the North Hub Riverwalk area. The south side of the New River is more local. Therefore, the first major restaurant should feature an American or Continental menu including seafood, steaks, chops, chicken, along with an extensive list of appetizers, both popular and expensive wines, and a major bar. The outside seating should have a colorful canopy or umbrellas. Banquet and meeting space should also be provided. The restaurant should be open for both lunch and dinner. Again, the restaurant(s) should initially focus on the residents, judges, lawyers and legal professionals located in the area. An independent restaurant might be named The Jury Room, Counselors, The Courthouse, Barristers, Jailers, or some other judicial or legal name. A second smaller restaurant should be a popular-priced casual chain or independent restaurant with a simple type menu featuring sandwiches, salads, light

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entrées, and drinks with a check average of \$12.00 to \$15.00. Free or validated lunch and dinner parking should be provided.

The South Hub retail space needs to be a mix of both independent and chain specialty shops that generate significant activity to the south side of the New River. Combined with the restaurants, they will provide a generative mix of occupants which will have financeability with acceptable risk. Retail space might include a fine men’s clothing store, a women’s apparel shop, (perhaps known as “The Legal Woman), South American jewelry, popular jewelry, The Best of Everything, candy shop, beauty salon, nail salon, florist, an Irish Pub or Ale House, Chinese shop & take out, Ice Cream shop, Char-grilled Hot Dogs & Brats, Gyros Shop, Mrs. Field’s, Pretzel Time, wine shop, GameStop, juice bar, grilled chicken shop, coffee shop, Starbuck’s, sports bar, office supplies, print shop, sports tickets, yacht rentals, and numerous others.

21. The south side of the Riverwalk should add other residential or mixed-use buildings with additional restaurants, quick service food units, entertainment, retail space, and activities.

The development of the south side of the New River in the Downtown Master Planning Area is only now starting, and thus lacks critical mass. Therefore, any new non-hub buildings should be required to provide commercial space at the Riverwalk level for eventual development. The 10 percent rule should apply to non-hub buildings fronting on the Riverwalk.

The South Hub area should be developed first. However, that may not happen. Thus, any new Riverwalk building should be required to have designated commercial space. In the interim, absent strong enough retail/restaurant market demand, some of the designated space might be leased for law offices, until there is sufficient market for restaurants, retail, entertainment, or cultural use.

Initially, any restaurants and shops should be focused upon the local residents, lawyers, law offices, judicial personnel and others employed in the area. There are only limited restaurant and retail facilities south of the river to SW 9th Street. Currently, the only restaurant on the south side of the New River on the Riverwalk is the Downtowner, which has been in the same location since the '70's.

Given the current residential, restaurant, and retail markets, it will probably be 8 to 12 years before the south side of the New River is fully developed, assuming a normal housing market.

22. The eight properties fronting on the south side of the New River as identified in Figure 2.D should add between 250,000 and 300,000 square feet of commercial space along the Riverwalk when redeveloped.

There are eight properties on the south side of the New River that front on the River, which should be required to develop their river frontage. Other than the hub areas, the 10 percent rule should be applied. All mixed-use buildings on the Riverwalk should plan the commercial space, including black iron, grease trap requirements, and all other code

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requirements. The south side Riverwalk buildings will usually require from 20,000 to 50,000 square feet of retail/restaurant/entertainment space. With potentially eight properties, this will eventually add between 250,000 and 300,000 square feet of commercial space on the south side of the Riverwalk.

23. A farmer's or green market should be established on the south side of the New River to provide an attraction.

A weekend Farmer's Market might be organized for the south side of the Riverwalk in front of the County Jail. We envision that the Farmer's Market would start as a "once every two weeks" attraction, eventually becoming a weekly event featuring produce, seafood, plants and flowers, and seasonal goods. This would serve a need and add an attraction. Saturday mornings would be ideal because it would not conflict with the many daily judicial activities. The City and County will need to address the opportunity and provide for a Farmers Market manager. We have also seen many that are sponsored by a local church that provides the leadership and management. The farmers/merchants need access, space, and security, as well as programming and organizational support/management to ensure the events are a permanent element of New River activity.

