



# RETAIL

## Economy - Sectors

Step 1: Understanding Yesterday and Today

### Metropolitan Core Jobs & Economy Land Use Plan

#### Highlights

- 8% of Metro Core employment is in this sector.
- Nearly 20% of these jobs are in clothing and accessories retail.
- The Metro Core has 51% of the city's jobs in this sector and 15% of the region's. This is a lower than average share.
- 60% of the Metro Core employees in this sector live in Vancouver.
- The Central Business District has a larger number of these employees than any other Metro Core sub-area. However, several sub-areas have a much larger percent of their jobs in this sector: Broadway East, Burrard Slopes North, and Granville Island.



#### What is included in this sector?

The retail sector is comprised of establishments engaged in retailing merchandise and providing services incidental to the sale of merchandise (*Statistics Canada*).

#### JOBS

#### How many people are employed in this sector?

In 2001, 15,900 people were employed in the retail sector in the Metro Core. This is 8% of all Metro Core employees. In terms of employment, the largest retail sub-sectors in the Metro Core are: clothing and clothing accessories stores, and food and beverage stores (Table 1).



New Retailers on Robson at Granville

**Table 1: Jobs by type**  
(300 or more jobs in the Metro Core)

Sub-sector	Metro Core	
Clothing and clothing accessories stores	3,065	19%
Food and beverage stores	2,750	17%
General merchandise stores (e.g. department stores)	1,780	11%
Miscellaneous store retailers (e.g. gift shops)	1,755	11%
Sporting goods, hobby, book and music stores	1,510	10%
Health and personal care stores	1,465	9%
Electronics and appliance stores	965	6%
Furniture and home furnishings stores	830	5%
Motor vehicle and parts dealers	765	5%
Non-store retailers (mail-order houses, vending machine operators)	520	3%
Building material and garden equipment and supplies dealers	340	2%
<b>Total</b>	<b>15,885</b>	<b>100%</b>

*Statistics Canada 2001 Census: Jobs by NAICS (3 digit), 2001.xls. See Note 1.*



Chinatown Markets

**How does this compare to the rest of the city and the region?**

**(a) Percent of total jobs**

The retail sector accounts for approximately 8% of all jobs in the Metro Core. This is lower than the rest of the city and region where the retail sector accounts for approximately 13% of all employment (Table 2).

	Metro Core	Rest of city	Rest of region
Total jobs	199,955	112,700	589,115
Number of people working in retail	15,895	15,255	75,690
% of total jobs	8%	14%	13%

Statistics Canada 2001 Census. Jobs by NAICS (2 digit), 2001.xls

**(b) Share of retail jobs**

The Metro Core has a lower than average share of city and regional jobs in this sector:

- 51% of city jobs in this sector are in the Metro Core (vs. 64% of all city jobs)
- 15% of city jobs in this sector are in the Metro Core (vs. 15% of all regional jobs)

However, the Metro Core's share is higher than the city and regional averages in the following sub-sectors:

- Clothing and clothing accessories stores
- Sporting goods, hobby, book and music stores, general merchandise stores, (Table 3).

	Metro Core's share of city	City total	Metro Core's share of region	Region total
Clothing and clothing accessories stores	66%*	4,640	24%*	12,610
Sporting goods, hobby, book and music stores	65%*	2,335	23%*	6,515
General merchandise stores (e.g. department stores)	64%*	2,765	15%	11,505
Miscellaneous store retailers (e.g. gift shops)	59%	3,000	20%	8,830
Health and personal care stores	50%	2,915	16%	9,325
Motor vehicle and parts dealers	38%	2,005	8%	9,700
Food and beverage stores	35%	7,925	10%	26,625
<b>Total Retail</b>	<b>51%</b>	<b>31,135</b>	<b>15%</b>	<b>106,830</b>
<b>All Sectors Total</b>	<b>64%</b>	<b>312,660</b>	<b>22%</b>	<b>901,775</b>

Statistics Canada 2001 Census: Jobs by NAICS (4 digit), 2001.xls. Note: \* indicates share is greater than 64% of city jobs or 22% of regional jobs.

## How has this employment changed over time?

The analysis of economic sectors over time is limited due to changes to the industrial classification methods used by Statistics Canada over the past 25 years. In 1981, the majority of the jobs within the retail sector were classified in the “retail trade industries” sector. From 1981 to 2001, retail trade jobs in the Metro Core decreased by 11%, compared to a 14% increase for all jobs (Table 4).

	1981	2001	% change
Total jobs	193,846	221,246	14%
Retail trade industries jobs	19,774	17,526	-11%

*Statistics Canada 1981& 2001 Census: Jobs by SIC, 1981 to 2001.xls. See Note 2.*

## Who is working in this sector and what do they do?

Women occupy 53% of the positions in this sector in the Metro Core. This is slightly higher than the rest of the city and similar to the rest of the region, where women occupy 48% and 54% of the positions, respectively. Overall, women occupy 50% of all jobs in the region.

Fulltime workers hold 72% of retail jobs in the Metro Core. Fulltime employment in retail is more common in the Metro Core than in the rest of the city and region, where 64% and 61% of retail workers are employed on a full time basis. Overall, 77% of all jobs in the region provide full time work (*Statistics Canada 2001 Census: Jobs by NAICS (2-digit and 4-digit) by work activity by sex.xls*).

Over half of the employment in the Metro Core retail sector is in sales, service and management occupations (Table 5).

Sales and service occupations	9,020	57%
Management occupations	3,285	21%
Business, finance and administrative occupations	1,605	10%
Trades, transport and equipment operators and related occupations	605	4%
Health occupations	560	4%
Natural and applied sciences and related occupations	355	2%
Occupations in art, culture, recreation and sport	230	1%
Total	15,890	100%

*Statistics Canada 2001 Census: Jobs by NAICS by Occupation, 2001.xls.*

## Where do employees in this sector live?

Approximately 60% of employees in the Metro Core retail sector reside in the City of Vancouver. This is higher than the average of 53% across all Metro Core sectors (Table 6).

Vancouver*	9,495	60%
Burnaby/New West	1,790	11%
North Shore	1,305	8%
South of Fraser	1,270	8%
Richmond	810	5%
NE Sector	685	4%
Maple Ridge/ Pitt Meadows	90	1%
Langley's	85	1%
UEL	80	1%
Total	15,895	100%

*Statistics Canada 2001 Census: Jobs by NAICS by POR, Metro Core, 2001.xls Note: \* includes people who work at home in this sector in the Metro Core.*

## BUSINESSES

### How many businesses are in this sector and what size are they?

There are nearly 2,100 business establishments in the retail sector in the Metro Core. This is 7% of all Metro Core businesses (vs. 8% of all employment).

Statistics Canada lists many businesses as indeterminate in size (36% in this sector - see Note 3). Of those for which size is known:

- 95% have less than 50 employees
- 37 have over 100 employees (Table 7).

### How do these businesses compare to the rest of the city and the region?

When compared to retail businesses in the rest of the city and region, businesses in the Metro Core tend to operate at a similar scale (Table 7).

# of employees	Metro Core		Rest of city		Rest of region	
1-4	587	45%	754	49%	2,462	46%
5-19	520	40%	562	37%	2,118	40%
20-49	132	10%	130	9%	455	9%
50-99	38	3%	39	3%	148	3%
100-499	35	3%	33	2%	148	3%
500+	2	0%	6	0%	9	0%
Total	1,314	100%	1,524	100%	5,340	100%

Statistics Canada: *Businesses by NAICS (2-digit) by Size, 2001.xls*.

## SPACE AND LOCATION

### How many people work from home in this sector?

Of those people employed in this sector in the Metro Core, 2% work from home (Table 8).

	Metro Core	City	GVRD
Total	15,895	31,150	106,840
Work at home	325	1,065	4,975
%	2%	3%	5%
% across all sectors	3%	7%	9%

Statistics Canada: *Jobs by NAICS (2 digit), 2001.xls*.  
Note: Figures above do not include employees with no fixed place of work.

### Where in the Metro Core is this sector located?

A significant amount of the retail activity in the Metro Core is located along major shopping streets downtown, such as on Granville, Robson, Denman and Davie Streets, in interior malls, and along the Broadway Corridor.

Robson Street from Denman to Cambie Streets has approximately 1.1 million square feet of gross retail space. The vacancy rate among retail spaces along Robson St. seldom rises above 0% as available space is usually pre-leased prior to lease expiry (JJ Barnicke. 2005. Retail Market Review: Greater Vancouver - Year End 2004. Toronto: JJ Barnicke).

The largest numbers of retail jobs by employment area are (Figure 1 on 2<sup>nd</sup> last page):

- Central Business District 4,500 jobs
- West End/ Coal Harbour 2,300 jobs

Overall 7% of Metro Core jobs are in retail. Sub-areas where this sector comprises significantly more than 7% include:

- Broadway East (19%)
- Burrard Slopes North (19%)
- Granville Island (19%) (see Table 9 on the 2<sup>nd</sup> last page)

### What types of space does this sector occupy?

Observation suggests that the types of spaces occupied by the retail sector vary considerably between businesses. Spaces demanded range from purpose built large floor plate commercial buildings with underground and roof top parking to traditional storefront spaces along commercial streets.

#### Case Study: Future Shop and Winners

Despite the rise of large suburban retail centres throughout the 1980s and 90s, several "big box" retailers have located in the Metro Core in recent years. Significant new facilities include the opening of the Future Shop/ Winners building on the corner of Robson and Granville in 2003. The three storey 96,000 square foot building contains space for boutique retailers along Granville St. This development highlights the potential for multi-storey retail spaces in the Metro Core (Downtown Vancouver BIA. 2003. Downtown Bulletin. October).

## WHAT ELSE DO WE KNOW ABOUT THE ECONOMIC ROLE OF THIS SECTOR?

The retail sector typically generates 6% of British Columbia's Gross Domestic Product and accounts for 12% of employees in BC. This is higher than the Metro Core where only 7% of all employees work in this sector (*BC Stats-- BC GDP by Industry and BC Employment by Industry*).

Employment in retail businesses is significantly influenced by tourism. In 2002, the government of BC attributed 9% of provincial employment in the retail sector to tourism. (*BC Stats. 2005. Tourism Industry Monitor Annual 2003. Victoria: BC Stats*).

Figure 1: Distribution of jobs

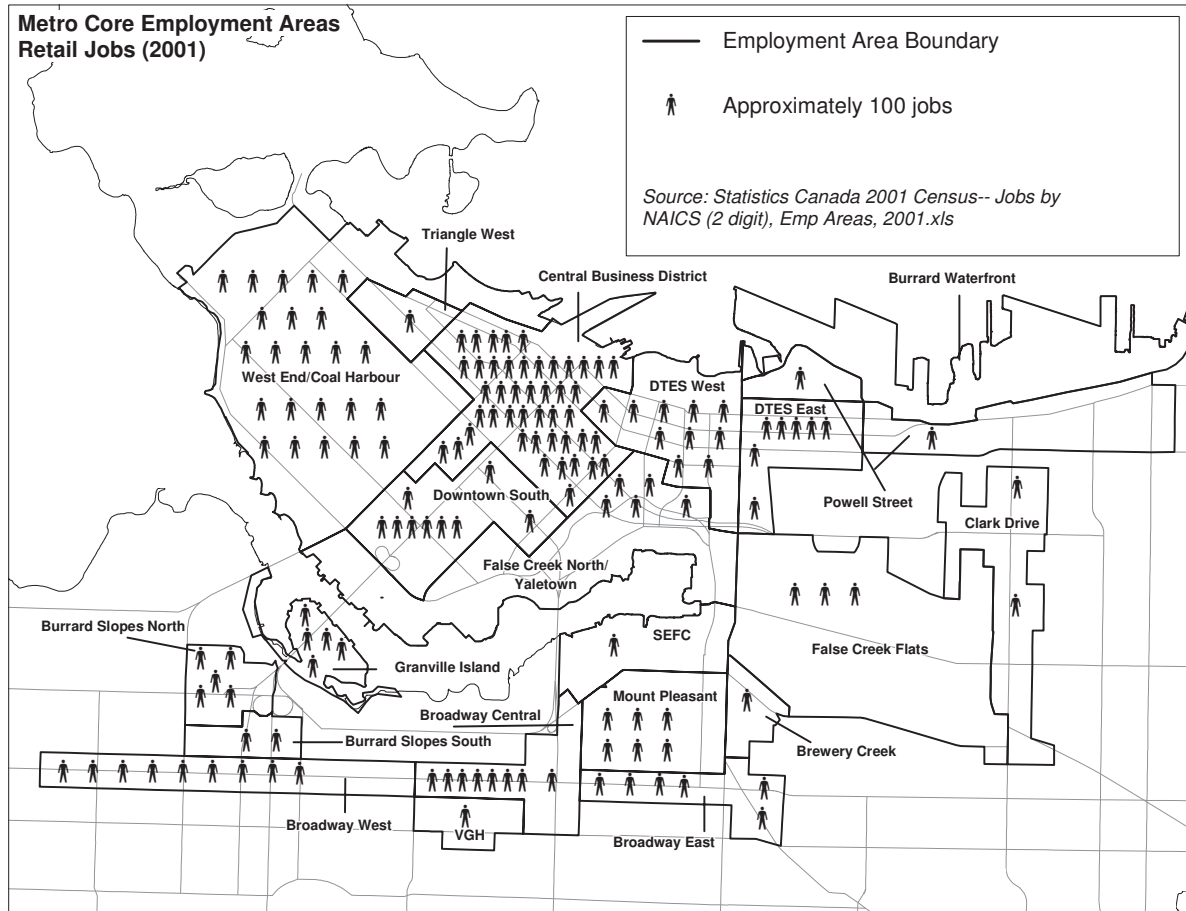


Table 9: Percent of total jobs by employment area

Broadway East	19%	Mount Pleasant	8%	SEFC	6%
Burrard Slopes North	19%	Burrard Slopes South	8%	Clark Drive	4%
Granville Island	19%	Broadway Central	8%	Brewery Creek IC	4%
West End/Coal Harbour	14%	False Creek Flats	8%	Triangle West	3%
DTES West	14%	Downtown South	7%	Powell Street	2%
DTES East	13%	False Creek North/Yaletown	6%	Burrard Waterfront	1%
Broadway West	9%	Central Business District	6%	VGH	1%

Statistics Canada 2001 Census-- Jobs by NAICS (2-digit), Employment Areas, 2001.xls. Note: Available data for the Burrard Waterfront employment area covers a geography that exceeds the boundaries of the Metro Core.

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## Sources / Contacts

Sources of information are recorded throughout this Information Sheet. Additional notes are provided here:

1) In this paper, NAICS refers to the 1997 North American Industrial Classification System, which was the system used by Statistics Canada in 2001 to categorize jobs and businesses by industry sector.

2) Re: Table 4 - Data in this table are categorized according to 1980 SIC (Standard Industrial Classification). SIC was the classification method used by Statistics Canada prior to the 2001 Census. The job totals in Table 4 are higher because they include an estimate of jobs with no fixed place of work. This estimate is reached by assigning to the Metro Core a share of the workers with no fixed place of work. The share is determined on a sector by sector basis and is based on the number of workers with a known place of work.

3) Re: Table 7 - Businesses in the “indeterminate” category have no employees registered on the payroll. They may have contract workers, or no workers at all. “Indeterminate” does not equate with “self-employed”. Self-employed businesses may be in either category.

This Information Sheet was published by the City of Vancouver. It is one in a series of Information Sheets produced for the Metropolitan Core Jobs and Economy Land Use Plan. The purpose of this initiative is to develop a long term land use policy plan to accommodate future economic activity and jobs in the Metro Core. For further information, please e-mail [corejobs@vancouver.ca](mailto:corejobs@vancouver.ca) or visit the website [www.vancouver.ca/corejobs](http://www.vancouver.ca/corejobs)