



EMPLOYMENT CHANGE IN RETAIL JOBS

Economy - Structure

Step 1: Understanding Yesterday and Today

Metropolitan Core Jobs & Economy Land Use Plan

Highlights

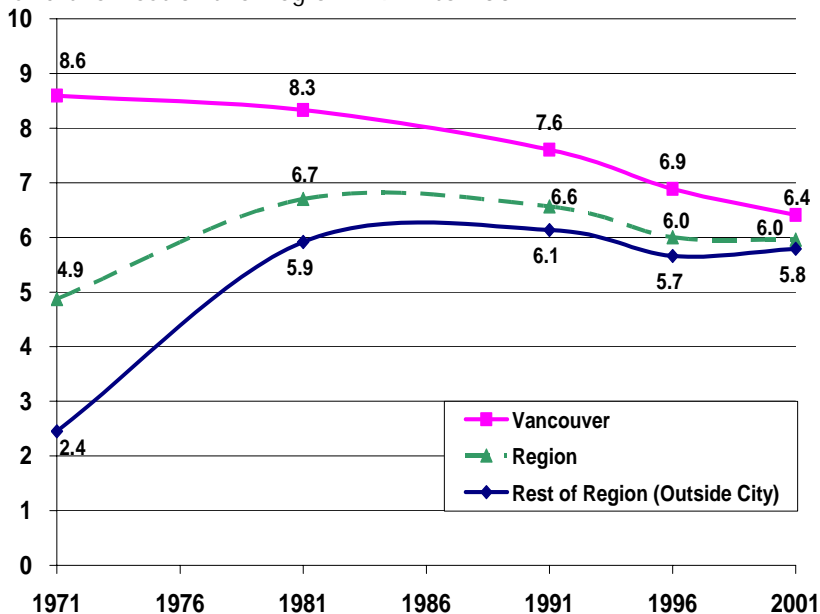
- Vancouver's role as a regional centre for retailing has decreased over the past 30 years as regional population centres have grown large enough to support more retail jobs in suburbs. This trend is common to all large urban areas in Canada.
- Of the 3 Metro Core sub-areas (Downtown Peninsula, South of False Creek and Eastern Core), only the Downtown Peninsula lost jobs in retail over the past 30 years with most losses occurring in department and other general retail stores. At the same time, the Downtown Peninsula gained jobs in food, shoe and clothing retail.
- Despite losing regional share in all types of retail, the Downtown Peninsula continues to have a relatively high share of regional jobs in clothing and shoe stores.



HOW HAS THE NUMBER OF RETAIL JOBS PER PERSON CHANGED IN VANCOUVER AND THE REST OF THE REGION?

There are about 6 retail jobs per hundred people in the region. Vancouver's ratio has historically been above the regional average reflecting the city's role as a regional centre for retailing with Vancouver merchants serving residents from both inside and outside the city. Despite this historic role, Vancouver's ratio has fallen over the past 30 years as regional population centres have grown large enough to support more retail jobs in the suburbs (Figure 1).

Figure 1: Retail jobs per 100 residents in Vancouver and the Rest of the Region: 1971 to 2001



Statistics Canada 2001 Census: Jobs by SIC (3 digit), 1981 & 2001.xls. Data include estimate of workers with no-fixed place of work. See Note 1.

Suburbanization of Retail in Canadian Cities

Suburban growth of retail jobs is not unique to the Vancouver region. According to Statistics Canada's Work and Commuting in Census Metropolitan Areas, 1996-2001, retail in Canada's eight largest urban regions has shifted away from the central core, "opting for more suburban locations" (pg. 5).

Heisz, Andrew and Sebastien La-Rochelle-Cote. 2005. Work and Commuting in Census Metropolitan Areas, 1996-2001. Statistics Canada website: <http://www.statcan.ca/english/research/89-613-MIE/89-613-MIE2005007.htm>

HOW HAS THE NUMBER OF RETAIL JOBS CHANGED IN THE METRO CORE?

There are 17,500 retail jobs in the Metro Core. This is 4,200 fewer jobs than in 1971. The decline of retail jobs is limited to the Downtown Peninsula where jobs fell dramatically between 1971 and 1996 and then grew slightly between 1996 and 2001 (See Page 3 for an analysis of retail jobs on the Downtown Peninsula). Retail jobs grew by 1,400 in the South of False Creek area with most growth occurring since 1981. There are about the same number of retail jobs in the Eastern Core as there were in 1971 - although this area experienced a slight drop in retail jobs between 1996 and 2001 (Map 1 and Figure 2).

Map 1: Employment sub-areas of the Metro Core

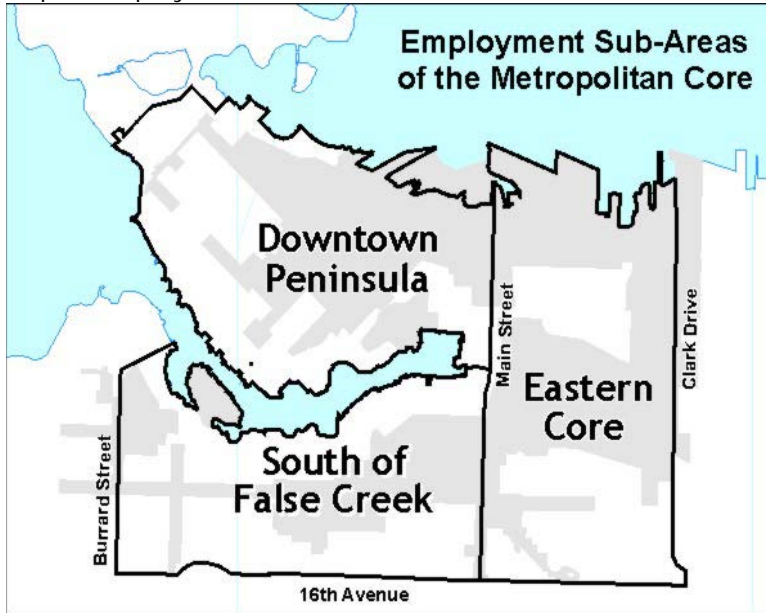
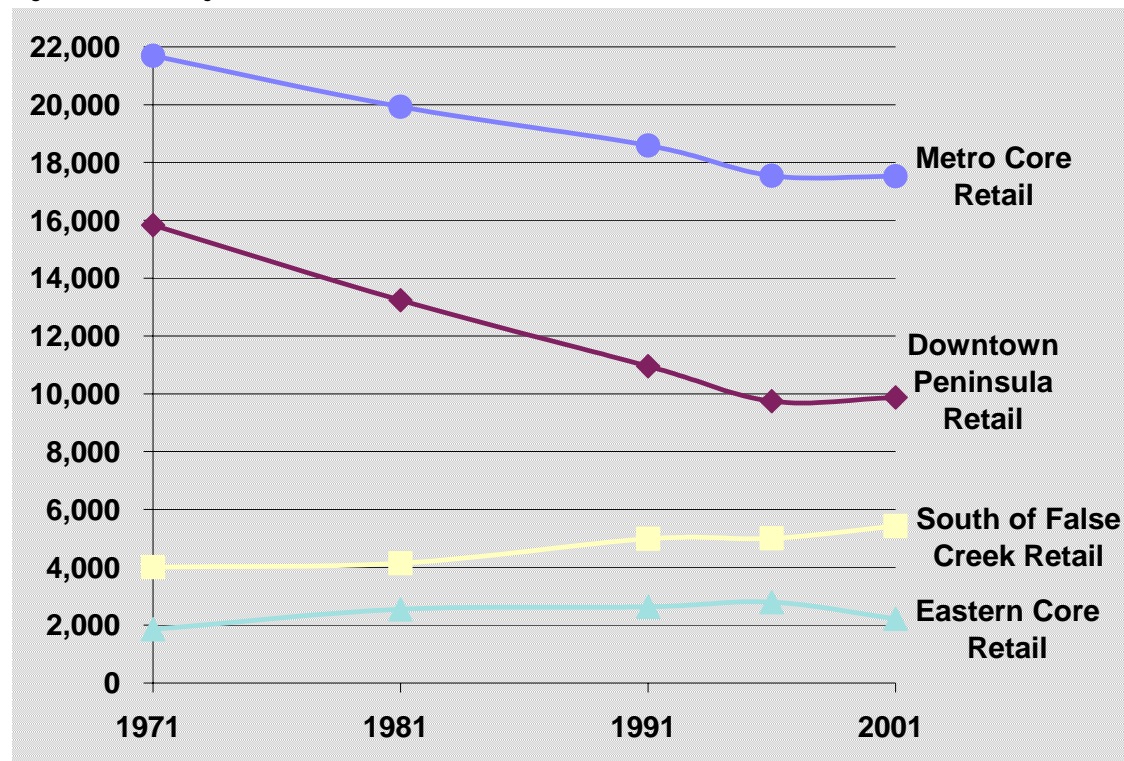


Figure 2: Retail jobs in the Metro Core and Metro Core sub-areas: 1971-2001

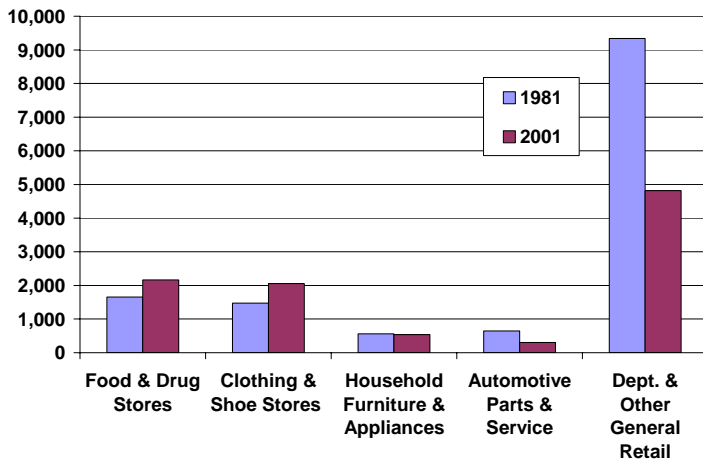


Statistics Canada 2001 Census: Jobs by SIC Time Series 1.xls. Note: data include estimate of workers with no-fixed place of work. See Note 1.

HOW HAVE RETAIL JOBS CHANGED ON THE DOWNTOWN PENINSULA?

Of the three sub-areas shown above, only the Downtown Peninsula lost jobs in retail over the past 30 years. Available data for the past 20 years shows that the decline of Downtown Peninsula retail jobs was concentrated in department stores and other general retail stores. Downtown Peninsula jobs in this type of retailing fell by over 4,500 between 1981 and 2001, while jobs in food stores and clothing retail increased (See Figure 3 for changes on the Downtown Peninsula & Table 1 in Appendix for changes in the South of False Creek and Eastern Core Areas).

Figure 3: Retail jobs on the Downtown Peninsula: 1981 and 2001



Statistics Canada 2001 Census: Jobs by SIC (3 digit), 1981 & 2001.xls. Note: data include estimate of workers with no-fixed place of work. See Note 1.

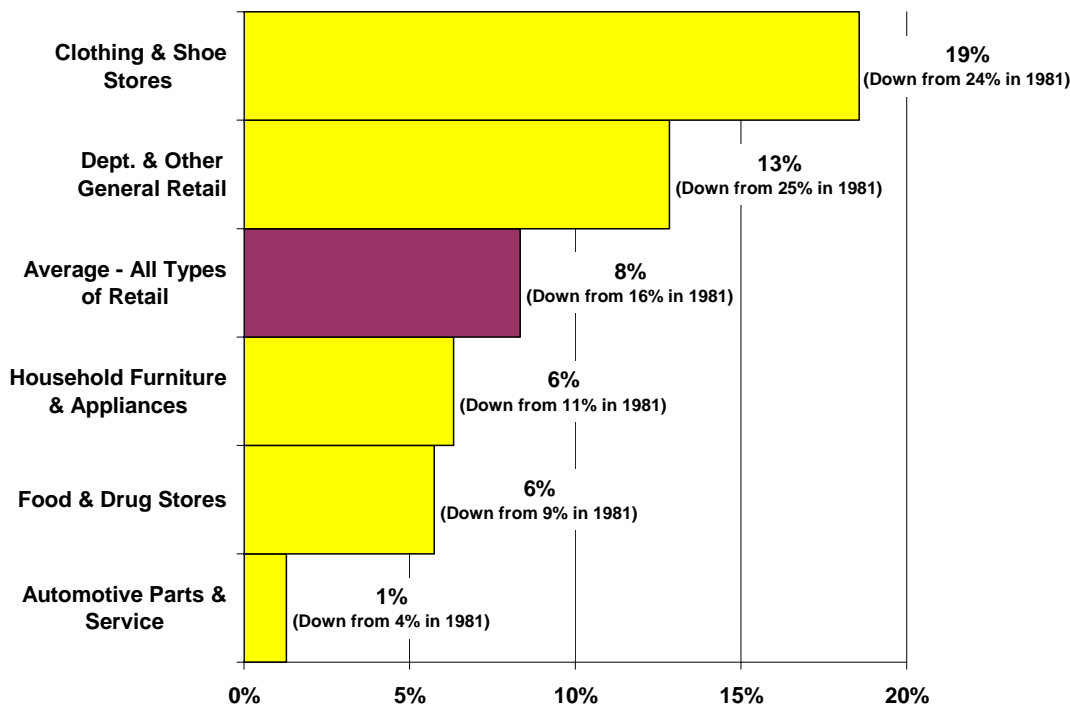
While the majority of Downtown retail job losses were in department and other general stores, it is important to recognize that regional jobs in this type of retailing held constant over the 20 year period. This was the only retail type that did not grow in the region. This lack of growth at the regional level points to a general restructuring of the retail sector where traditional department stores lost market share to retailers who achieve their competitive advantage through either specialization (e.g. electronics, furniture and clothing stores) or high volumes (e.g. big box stores and super-centres).

In summary, the decline of Downtown department stores can be attributed to two factors: the first being the natural maturation of suburban retail markets (see Page 1); the second being the general restructuring of the retail sector.

HOW HAS THE REGIONAL ROLE OF RETAIL ON THE DOWNTOWN PENINSULA CHANGED?

The Downtown Peninsula share of regional retail jobs decreased from 16% to 8% between 1981 and 2001. Despite losing regional share in all types of retail, the Downtown Peninsula continues to have a relatively high share of regional jobs in clothing and shoe stores (19% vs. 8% of all retail jobs) (Figure 4).

Figure 4: Share of Regional Retail jobs on the Downtown Peninsula 2001



Statistics Canada 2001 Census: Jobs by SIC (3 digit), 1981 & 2001.xls. Data include estimate of workers with no-Fixed place of work. See Note 1.

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

1) Re: inclusion of workers with no fixed place of work. When workers with no-fixed place of work are added, the estimated number of total jobs in the Metro Core rises from 199,955 to 221,250. To make comparisons over time, these workers must be included because they were not separated out in past data. The 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. The GVRD makes these estimates for each municipality. (In other Information Sheets, such as the Retail sector sheet, workers with no fixed place of work are not included because they are not as relevant to identifying job location needs in the Metro Core, which is the purpose of this study and because on a sector-by-sector basis in small geographic areas the data is more accurate without this estimate.)

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 or visit the website www.vancouver.ca/corejobs.

APPENDIX - RETAIL JOBS IN THE METRO CORE SUB-AREAS: 1981-2001

	1981	2001	CHANGE
Downtown Peninsula			
Food & drug stores	1,652	2,163	511
Clothing & shoe stores	1,473	2,052	580
Household furniture & appliances	559	535	-24
Automotive sales/ parts & service	645	304	-341
Dept. & other general retail stores	9,342	4,819	-4,524
Total Downtown retail	13,671	9,873	-3,798
South of False Creek			
Food & drug stores	634	1,234	600
Clothing & shoe stores	431	420	-11
Household furniture & appliances	405	640	236
Automotive sales/ parts & service	1,473	1,076	-397
Dept. & other general retail stores	1,072	2,058	986
Total South of False Creek retail	4,014	5,427	1,414
Eastern Core			
Food & drug stores	667	992	325
Clothing & shoe stores	102	163	61
Household furniture & appliances	203	136	-66
Automotive sales/ parts & service	589	525	-64
Dept. & other general retail stores	561	399	-162
Total Eastern Core retail	2,121	2,215	94

Statistics Canada 2001 Census: Jobs by SIC (3 digit), 1981 & 2001.xls. Data include estimate of workers with no-fixed place of work. See Note 1.