

DOWNTOWN EASTSIDE VANCOUVER

RETAIL CAPACITY STUDY

For:



CITY OF VANCOUVER
COMMUNITY SERVICES GROUP
Planning

May 2005



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With



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STUDY**

May 2005

May 20, 2005

Ms. Jessica Chen-Adams
Planner
Community Services Group
City of Vancouver
453 West 12th Avenue
Vancouver, BC V5Y 1V4

Dear Ms. Jessica Chen-Adams:

Thank you for the opportunity to prepare this Retail Capacity Study for the City of Vancouver. As you will find throughout our research and recommendations, we feel that the Downtown Eastside is significantly oversupplied with retail and service commercial floor space. The result of this is large tracts of vacant storefronts and an un-healthy commercial environment in some areas.

Despite this condition, retailing in Chinatown and Gastown appears relatively strong, supported by inflow spending from both visitors and residents.

We have made a number of recommendations for how to improve the overall retail situation, which focus on the need to reduce the supply of commercial space at-grade and to focus commercial into nodes. Our preference is to replace underperforming retail with high density residential, and the selective placement of live/work units.

We are keenly aware of the need and desire to maintain active and interesting retail and complete community environments in Gastown and Chinatown and we feel that our recommendations serve these goals.

If you have any questions, or need for further study, please do not hesitate to call me directly

Yours very truly,



Blake Hudema

Encl.



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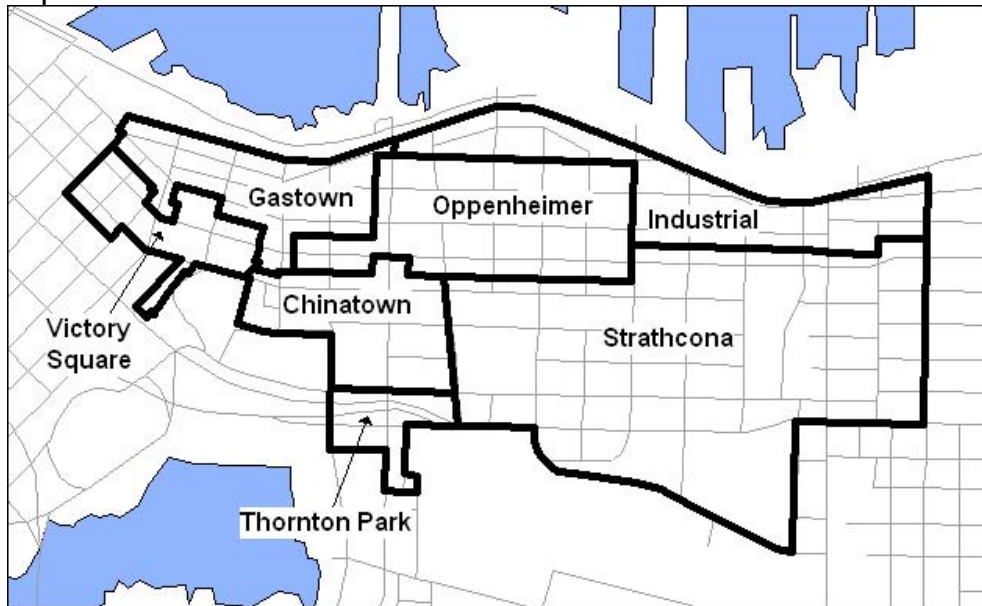
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1.0 INTRODUCTION

The purpose of this study is to understand the retail commercial activity in the Downtown Eastside (DTES). To understand it is to describe it fully, report on who it serves, how much activity there is, and ultimately to estimate what the real potential for retail activity is in this neighbourhood. The area included in this study and described broadly as the Downtown Eastside is actually comprised of a number of distinct neighbourhoods. The following map shows the study area and the neighbourhoods included within it.

Map 1 - DTES Sub-Areas



The Downtown Eastside of Vancouver is located immediately east of the City's downtown commercial core. It is approximately bound to the west by the commercial core and Yaletown, to the north by the rail yards and Burrard Inlet, to the south by the rail yards and industrial areas in the False Creek Flats, and to the east by the Grandview/ Woodlands neighbourhood beyond Clarke Drive.



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A merchant sells seafood from an outdoor stall in Chinatown. Pender and Keefer Streets are still active retail streets, but competition elsewhere in the Lower Mainland for Asian customers has impacted Chinatown's businesses.

Photo: Smerdon, 2004

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The DTES is visually characterized by heritage districts, industrial districts, ethnic markets, new developments, historic and vibrant residential neighbourhoods, large-scale institutions, and a diverse mix of commercial and social services. Culturally, the DTES is comprised of a broad range of ethnic populations, including a large Chinese cohort. There is a vibrant arts scene as well as theatres, cafes and restaurants.

The principal east-west transportation route in the DTES is Hastings street which bisects the DTES for its entire length. At the western edge of the DTES, Hastings Street is lined with historic 4, 5, and 6-storey buildings which were constructed at the beginning of the 1900s when this district was Vancouver's downtown core and central business district. Today, many of the buildings are vacant, including much of the ground floor space and the iconic Woodwards department store building.



Looking east on Hastings Street from Victory Square. Hastings Street, east of Cambie was once Vancouver's commercial core. Many buildings remain from that time, a century ago.

Photo: Smerdon, 2004

Further east, beyond Main Street, Hastings is less densely lined with buildings. The uses are more industrial and institutional, which sporadic retail and commercial uses at key intersections such as Clark Drive.

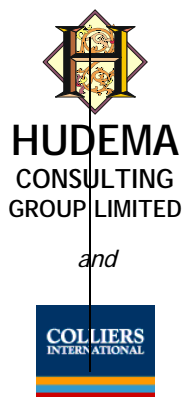
Surrounding the DTES are a number of significant land use and geographical constraints that impact on the patterns of living and working in the DTES. To the west, the dense commercial core has seen considerable residential development recently, particularly in Yaletown and Downtown South. The result has been higher land values which are actively putting pressure (in the form of higher land values) on the western edge of the DTES to redevelop. Gastown is already experiencing redevelopment of many of its heritage structures, and residential or live/work developments are the most common development type.



Gastown's Water Street has some of the city's oldest buildings. Once an important warehousing district for the rail yards north of Water Street, Gastown is now popular with tourists and a new influx of residents.

Photo: Smerdon, 2004

To the north, the waterfront rail and port are long-established uses that are likely to remain more or less in their current locations and usage. Their impacts on the DTES are positive from an economic standpoint (jobs, tax



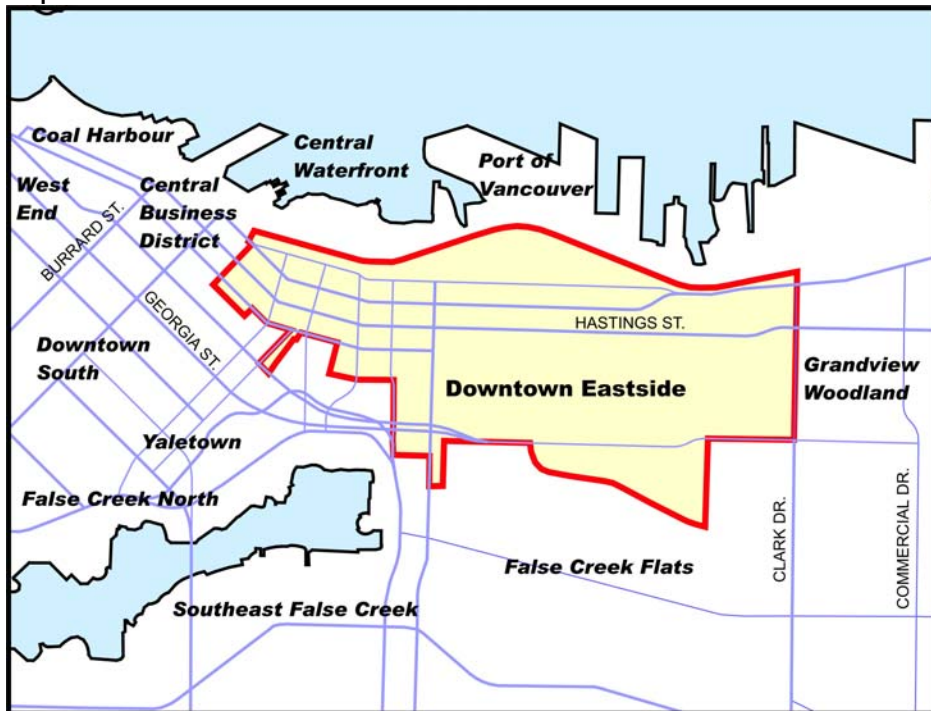
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base), but from a land use and development standpoint, these uses are a northern boundary which generally reduce the value of land immediately adjacent.

In the south, the terminal lands and the false creek flats areas have recently seen renewed interest from industrial and institutional uses. After the collapse of a plan for a high technology industrial development, Providence Health has recently been investigating plans for a major health care campus east of Main Street and south of Prior.

Map 2 - DTES Context



Also to the south, west of Chinatown are the residential and commercial developments around the International Village site. International Village is a 200,000 square foot retail mall which has suffered from high vacancy levels since it was constructed. It has a number of high-rise residential towers in its vicinity, and a number of new residential developments are being constructed to its south.

The following sections describe the individual DTES neighbourhoods and sub-areas in more detail.

Gastown is the historic district of near-waterfront land situated to the east of the Central Business District, and to the north of Chinatown and Victory Square. The district is distinguished by the brick 4 to 6 storey buildings that line cobble-stoned Water Street and Cordova Street, from Richards Street to about Main Street. Many of the buildings in Gastown are heritage structures dating from the early 1900s.



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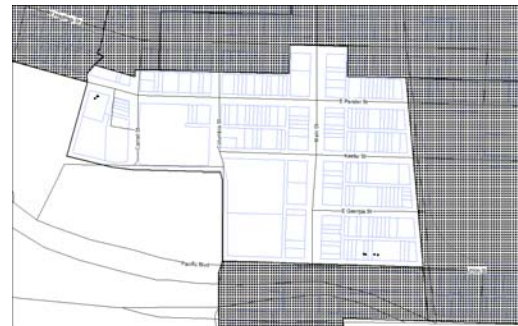
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Once important as the economic heart of an emerging City of Vancouver, this warehousing and rail district is now one of the top tourist areas in the city - frequented by visitors (including the 1 million plus cruise ship passengers) as well as locals. Gastown boasts a growing resident base and a thriving nightlife. Whereas 10 years ago Gastown was defined by restaurants, the steam clock, souvenir stores and Gassy Jack, today it is exemplified by live/work apartments, nightclubs, and more prominent year-round retailers. Efforts continue to encourage revitalisation that is seeing the Woodward's parkade redeveloped, along with smaller buildings in this area. The new Storeyeum attraction is a major addition to the visitor amenities in this neighbourhood.



The corner of Hastings and Main was once the most important intersection in Vancouver - a commercial hub, and the centre of downtown. Hastings and Main is now the centre of the Downtown Eastside, and for many people it is still the most important intersection in the city, but today for different reasons. The DTES is the poorest neighbourhood in Canada (Statistics Canada 2001), with high rates of HIV infection, drug addiction, mental illness, and unemployment among its inhabitants. However, within that context, and often overlooked, is the existence of a strong community, residents who love their neighbourhood and want to live and prosper there, and businesses that endure, year after year.

East of Vancouver's Central Business District, and immediately south of Gastown is Chinatown - the second largest Chinatown in North America. As one of the most historically significant parts of the City, and supported by a large ethnic Chinese population in the Lower Mainland, Chinatown in 2004 has a blend of heritage character and commercial vibrancy. The



The main commercial corridors of Pender and Keefer Streets, on either side of Main Street, are popular with tourists and residents alike. The neighbourhood is a short walk from downtown and has parks, attractions, shops, restaurants and services in a relatively dense and colourful environment. The City of Vancouver Council in 2002 adopted a vision for Chinatown which intends to see it evolve as a complete community for commerce and for residents.

Despite all of its attributes, and a low commercial vacancy rate, Chinatown has seen steadily increasing competition for the ethnic Chinese customer base from suburban malls, in Richmond particularly.



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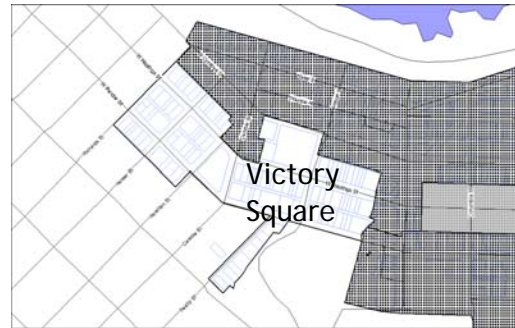


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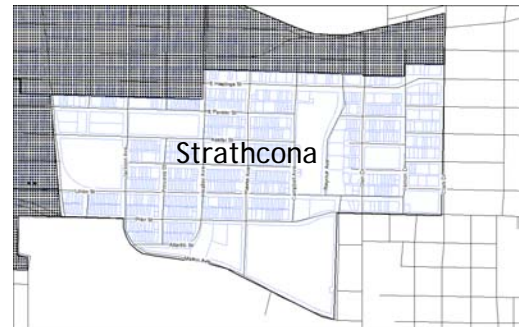
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Located to the northwest of Chinatown, and to the south of Gastown is the **Victory Square** neighbourhood. Originally an extension of Gastown in the late 19th century, Victory Square is today centred around the park of the same name and its resident war memorial, and is delimited by W Pender Street to the south, Richards Street to the west, Beatty Street to the east, and various streets including W Cordova and W Hastings to the north. Originally a part of Vancouver's administrative and commercial centre, Victory Square has managed to appear more vibrant than neighbouring areas to the east despite having the lowest per capita income levels in the DTES. Many businesses flourish in the area, and a significant and relatively stable population resides within its boundaries.

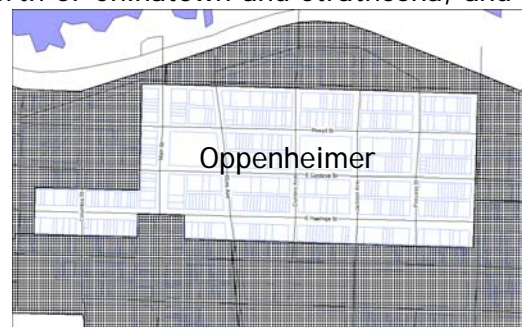
Within the last decade there has been an explosion in the number of Language schools in Greater Vancouver. Thousands of foreign students are coming to this region to live, while learning to speak English. The DTES has seen several schools locate within it, adding a highly visible, active, and youthful energy to the areas they locate.



Strathcona is a historical district that was originally rooted by the location of a large mill in the mid to late 19th century. Strathcona makes up a relatively large part of the DTES, and is bordered by East Pender and East Hastings Streets to the north, Gore Street to the west, Clark Drive to the east, and Prior Street, Malkin Avenue and Venables Street to the south. Strathcona today includes light industry, retail, manufacturing, wholesale storage, and a diversity of housing. Strathcona is seeing the start of gentrification, with many of the older character houses being renovated and restored. This process is evident despite the close proximity of Canada's poorest neighbourhood.



The **Oppenheimer** area is located north of Chinatown and Strathcona, and east of the Gastown area. It is delimited by Hastings Street to the south, Alexander Street to the north, Heatley Avenue to the east, and Main Street to the west. Oppenheimer was Vancouver's Japantown prior to World War II. Today it includes a wide variety of land uses, such as retail, churches,



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light industrial, institutional, etc. Oppenheimer is centred around the park of the same name.

Thornton Park is a small land area located to the south of Chinatown, near the train station. It has a small population, and most employment in the area is based on the transportation industry.

North of the Oppenheimer and Strathcona areas is the **DTES Industrial** area. This area has a large amount of employment within its boundaries, and few residential or retail uses are found in this area.



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2.0 Literature Review

2.1 Introduction

This section reviews the planning literature relevant to a project of this scope set in Vancouver's Downtown Eastside. A review of planning literature brings to the foreground any planning frameworks already in place which must be respected in a re-ordering of commercial uses in the Downtown Eastside.

The documents reviewed include:

- The Vancouver Agreement;
- The Downtown Eastside Economic Revitalisation Plan;
- An Economic Capacity Study by Ference Weicker & Company; and,
- Zoning Schedules: HA-1, HA-1A, H-2, M-2, DEOD, and DD.

Important findings of our review of planning literature include:

- Efforts to organize and streamline retailing in the DTES should aim to retain existing business, attract new business through such measures as increased safety and security and an easing of the restraints to investment in buildings, and increase a sense of community pride and identity in the area, perhaps in part by a branding of each of the DTES' sub-areas.
- Future retail should take utmost advantage of the visitor trade in Gastown and Chinatown, while also serving the growing resident base in these neighbourhoods;.
- The redevelopment of the Woodward's building, and the new Carrall Street Greenway are of great importance, as they provide links between the two commercial districts of Gastown and Chinatown.

2.2 Vancouver Agreement

The Vancouver Agreement is an agreement between the governments of Canada, British Columbia and the City of Vancouver to cooperate in their efforts to increase sustainable economic, social and community development in the City of Vancouver. It was initiated in 2000, and will span a 5 year period, ending in 2005.

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Within the Vancouver Agreement it is stipulated that the initial focus of efforts made within the context of the agreement will be on the City of Vancouver's Downtown Eastside.

The Vancouver Agreement is relatively broad in scope, and includes amongst its component parts the Downtown Eastside Economic Revitalization Plan.

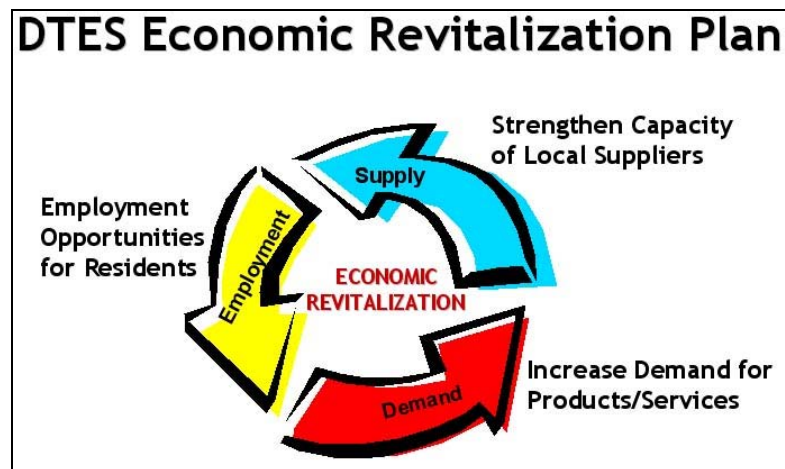
2.3 Downtown Eastside Economic Revitalization Plan

The DTES Economic Revitalization Plan is designed to aid in the development of business activity and job creation. Input was provided by community groups and residents, business organizations and individual businesses in the development of the Plan.

The goals of the Plan include the retention of existing and attraction of new businesses, and the enlargement of a sense of community pride and identity within the DTES.

The Economic Revitalization Plan will aim to take advantage of the current strengths of DTES communities in order to promote its goals. These strengths include an abundance of local history and heritage structures, a number of major developments soon to be undertaken within close proximity, a diversified economy, a central location, low land values and the commitment of residents to the neighbourhood.

The strategy for economic revitalization laid out in the report involves the creation of a cycle of economic growth whereby demand for products of the DTES, supply of products from the DTES and employment opportunities in the DTES are stimulated simultaneously, each increasing demand for the next. This cycle and its workings are illustrated in the following diagram.



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2.4 Economic Capacity Study - Ference Weicker & Company

This study was conducted in May 2002 in order to develop a profile of the economy in the Downtown Eastside and to identify and assess potential economic and community development opportunities and drivers.

According to research done by Ference Weicker & Company through many interviews with representatives of businesses located in the DTES, there are multiple advantages and disadvantages to location within the area. Advantages include the central location; readily available transportation links including rail, port and light air; the history of the neighbourhood and resultant selection of heritage structures; low property costs; and, views of both water and mountains. Disadvantages to locating within the DTES include drug and alcohol abuse issues in the area; general safety and security within the area; issues of mental illness; lack of investment in buildings and infrastructure; high and increasing vacancy rates; and, a small local business market, due both to low population and low average buying power within this population.

Recommendations of the business representatives interviewed in the study to aid in the economic revitalization of the DTES included the following:

- Improvement of drug, alcohol and prostitution problems;
- Improve security;
- Physical improvements;
- Promotion of business development, tourism and various shopping areas, to attract people;
- Location incentives to retain existing and attract new businesses;
- Promote investment through strategies including the development of key economic drivers such as a Woodward's building redevelopment; and,
- Encourage local property owners to invest in heritage aspects of the area.

Some of the many potential opportunities for further development and expansion in the Downtown Eastside, the retail sector, tourism and the Woodward's redevelopment were identified as important.

The retail sector represents the largest component of the DTES economy, being comprised of 27 percent of the area's employers and 21 percent of the employees.

The following table from the report indicates the importance of retailing as an economic sector in the DTES.



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Retail Sector	Employers	Employees
Restaurants	158	1,568
Food Stores	117	800
Apparel Retailers	77	477
Gift Shops	38	103
Antique Stores	23	50
Computer Stores	19	208
Bars	16	250
Other	177	791
Total	625	4,247

Source: Ference Weicker & Company - Economic Capacity Study

Retailing as a whole consists of 625 employers and 4,247 employees in the study area. This industry is not divided evenly among the seven sub-areas under study in the report. Retailing is relatively important to the economies of the Chinatown, Gastown and Victory Square areas when compared to the other areas under consideration. The following table illustrates the importance of retailing as a percentage of total employment in each of the seven sub-areas.

Neighbourhood	% of Total Employment in Neighbourhood
Chinatown	35%
Gastown	29%
Victory Square	26%
Oppenheimer	17%
Strathcona	15%
Thornton Park	9%
Industrial Area	3%
Overall	21%

Source: Ference Weicker & Company - Economic Capacity Study

The Ference Weicker report recommends the immediate expansion of retail uses in the DTES in order to create employment and a visible improvement in the character of the streets.

In order to promote the aforementioned growth in the retail industry, several strategies have been put forth. These include:

- The promotion of safety and security;
- An easing in the constraints to investment in the building infrastructure;
- The branding of the DTES' sub-area neighbourhoods, in order to promote them in the minds of other residents of the Lower Mainland;
- The promotion of special events in the DTES;
- An increase in the level of market housing in the area in order to grow the local retail market; and,
- Promotion of tourism in the DTES.



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Tourism is another opportunity for economic growth in the Downtown Eastside. The basis for this opportunity is the cultural and heritage assets possessed by the area under study, the reputation already enjoyed by Chinatown and Gastown in this regard and the proximity of these two sub-areas to transportation infrastructure and the cruise and convention activity in the City.

Drivers and strategies suggested by Ference Weicker to help grow the tourism industry in the DTES include the branding of the area's component neighbourhoods and the establishment of a safe and attractive pedestrian corridor connecting Gastown and Chinatown, which would likely include a redevelopment of the Woodward's building, at Hastings and Abbot Streets.

The potential redevelopment of the Woodward's building is heralded as the single most important factor affecting the economic development of Vancouver's Downtown Eastside. The Woodward's site and its environs create a link between Gastown, Chinatown, and points east. Various redevelopment scenarios have been put forth in the past, involving various combinations of residential (affordable and market), retail, education (SFU), and other land uses.

Note: After a recent competition, Westbank Projects was selected by the City to create a mixed-use development on the site, incorporating a mix of market and non-market residential uses, education, offices, and retail space. Up to 70,000 square feet of retail will be added along Hastings and Abbott Streets.

The final recommendations of the Economic Capacity Study, as prepared by Ference Weicker & Company, were numerous. The first four, in order of importance, are listed below.

1. Redevelop Woodward's
2. Increase safety and security in DTES
3. Ease constraints to investment in buildings and infrastructure
4. Neighbourhood branding and tourism products

Of the many recommendations that followed, two that stuck out in the context of the current study were an increase in the level of market housing stock in the area and the creation of a safe corridor connecting Gastown and Chinatown.

Other themes noted in the review of the report that did not appear in the final recommendations include the theory that a critical mass of retailers is required to attract consumers. This critical mass, it is argued, is being or has been lost in the Downtown Eastside. It may be that the remaining retailers are too spread out to effectively act as the critical mass. Additionally, the trend of streetfront shopping in intimate, pedestrian-oriented environments is noted. This represents the reason that the DTES' heritage structures are invaluable; they are ideal for implementation of this sort of shopping environment.



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2.5 Zoning Schedules

A variety of zoning regulations apply in the DTES. The following map shows where different zoning applies across the DTES.

Map 3 - Zoning in the DTES



2.5.1 HA-1 and HA-1A Districts Schedule

(Chinatown Historic Area) and Chinatown HA-1 Guidelines for Designated Sites

This document provides basic development controls that regulate land use and building form in order to promote the preservation and rehabilitation of the significant early buildings of Chinatown, while recognizing necessary change. Whereas the HA-1 schedule permits heights in keeping with existing building heights in Chinatown, the HA-1A schedule was introduced in 1994 to promote further development in Chinatown by allowing higher development heights. According to the schedule: *The objective is to encourage new buildings with a height up to 21.3 m. Heights up to 27.4 m may be permitted if urban design issues are addressed. Mezzanines are encouraged.*

According to the HA-1 Plan, a wide variety of uses are considered “Outright Approval”, including various cultural & recreational, dwelling, institutional, manufacturing, office, retail, service, utility & communications and wholesale uses. An even greater variety of uses may be considered for implementation under certain conditions.

Regulations in the plan are intended to maintain the character of Chinatown by promoting a retail format whereby there are many small shops and limited frontage widths in new construction. Building heights are also regulated so as to remain in sync with historical standards. Other factors which are carefully controlled by the HA-1 Plan in order to maintain and improve the current atmosphere include building setbacks and the like.

In the accompanying Chinatown HA-1 Guidelines for Designated Sites document, it is stated that “shopfront configuration is the basic building



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block of pedestrian experience in Chinatown, providing the area's fine-grained retail interest".

2.5.2 HA-2 District Schedule

(Gastown Historic District) and Gastown HA-2 Design Guidelines

This document is designed to recognize area's special status and to ensure the maintenance of Gastown's historical and architectural character.

Outright approval land uses in Gastown are limited to retail and certain restaurants. Size restrictions on these uses include a total area of less than 500 square meters (on the ground floor only) and a frontage of under 10.7m. Building heights are limited to less than 23 m.

Conditional approval uses include a variety of cultural, recreational, dwelling, institutional, manufacturing, office, parking, retail, service, utility & communications and wholesale uses.

The accompanying Gastown HA-2 Design Guidelines are intended to conserve the authentic heritage character and fabric of Gastown and to ensure that new development is supportive of and harmonious with the area's heritage character.

2.5.3 M-2 District Schedule

The intent of this Schedule is to permit industrial and other uses that are generally incompatible or potentially dangerous or environmentally incompatible when situated in or near residential districts but that are beneficial in that they provide industrial employment opportunities or serve a useful or necessary function in the city.

Outright approval land uses in M-2 are a variety of manufacturing uses, gasoline stations, non-personal services, storage, warehousing, and wholesaling industries.

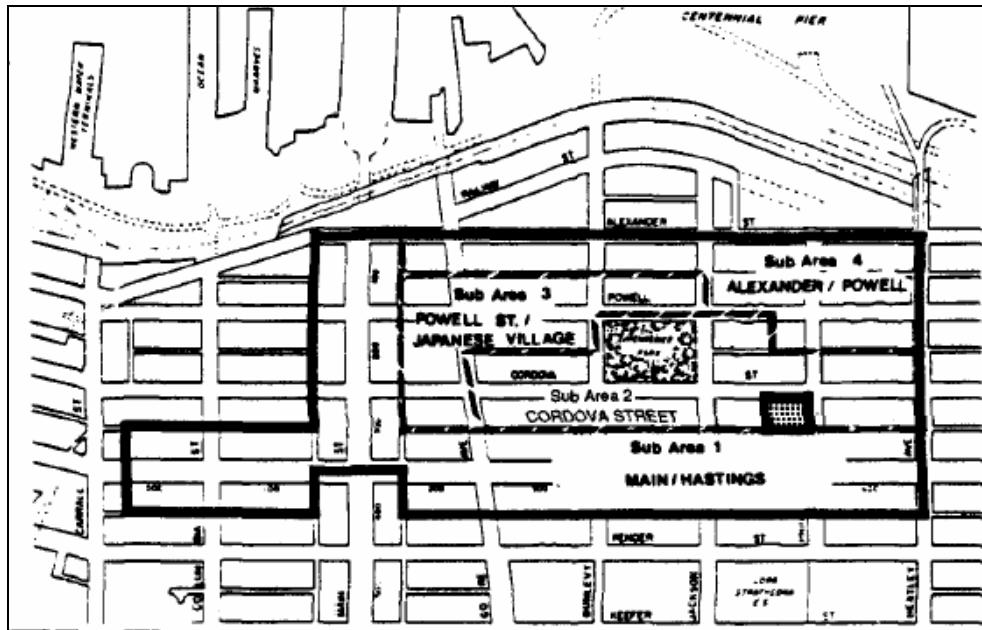
A wide variety of conditional uses are possible in this district, which is one of the most permissible zoning districts in the city. Very few lot coverage, setback, or design guidelines apply. The maximum FSR is 5.0, and the maximum building height is 30.5 metres. The only residential uses allowed are artist live-work units.

2.5.3 DT-Eastside/Oppenheimer Official Dev. Plan (DEOD)

The Official Development Plan for the Downtown-Eastside/Oppenheimer area is intended to control and guide the development of all uses in that part of the City. The DEOD outlines 4 principal sub-areas within the planning area that have different uses, goals, and intents for land uses within them. The following descriptions are taken directly from the DEOD, and apply to the boundaries on this map.

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Sub-area 1 Main/Hastings -- The development of the Main/Hastings sub-area, should further establish its importance as a gateway to the Downtown, and help to clarify the functions of the adjacent Historic Areas of Gastown and Chinatown and the Oppenheimer and Strathcona residential neighbourhoods. Therefore, this area is intended to be a high-density, mixed commercial and residential area, appropriate for a mix of office, retail, local social services, and other similar uses.

Residential uses are also permitted. Pedestrian-oriented uses, primarily retail and restaurant, are encouraged at ground level with an emphasis on continuity of facade and narrow frontages for individual uses on Main Street from Hastings to Cordova and along Hastings Street from Carrall to approximately Dunlevy.

The retention and upgrading of existing multi-unit residential buildings is encouraged. The development of new residential units on upper floors of buildings is encouraged through a floor space bonus system.

Sub-area 2 Cordova Street - The Cordova Street sub-area is intended to be a medium density residential area, suitable for residential development for a variety of household types. Rehabilitation of existing residential buildings is encouraged. To upgrade the standard of accommodation available, new units should be self-contained and rehabilitated sleeping and housekeeping units should be converted to self-contained dwelling units where possible.

Sub-area 3 Powell Street/Japanese Village - The Powell Street/Japanese Village sub-area is intended to be a medium density mixed commercial residential area, appropriate for retail, restaurant and other similar pedestrian-oriented uses at street level, and residential, commercial and office uses on upper floors.



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This sub-area should continue to provide shopping facilities which serve the day-to-day needs of local residents and workers. The 300 and 400 blocks of Powell are also intended to be the core of the Japanese Village character area. Developments which recognize the area's unique ethnic history and which enhance its historical, architectural and cultural character are encouraged.

Sub-area 4 Alexander/Powell - The Alexander/Powell sub-area is intended to be a medium density, mixed industrial-residential area, appropriate for small scale light industrial uses and residential uses. New industry, and expansion of existing industry, should be compatible with nearby and adjacent residential uses.

2.5.4 Downtown Official Development Plan (DD)

The DD regulates development that can occur in the area shown on the following map. At the northeast corner of the DD area, it includes parts of the Victory Square and Gastown sub-areas of the DTES, covered in this report.

The intent of this Official Development Plan is:

- (1) to improve the general environment of the Downtown District as an attractive place in which to live, work, shop and visit;
- (2) to ensure that all buildings and developments in the Downtown District meet the highest standards of design and amenity for the benefit of all users of the Downtown;
- (3) to provide for flexibility and creativity in the preparation of development proposals;
- (4) to encourage more people to live within the Downtown District;
- (5) to support the objectives of the Greater Vancouver Regional District as referred to in "The Livable Region 1976/1986" as issued March 1975, to decentralize some office employment to other parts of Greater Vancouver by discouraging office developments considered inappropriate in the Downtown District;
- (6) to improve transportation downtown by encouraging greater transit usage, discouraging automobile usage for journeys to work, and by maintaining automobile access for non-work trips including shopping, business and entertainment;
- (7) to create a distinctive public realm and a unique and pleasing streetscape in the Downtown District.



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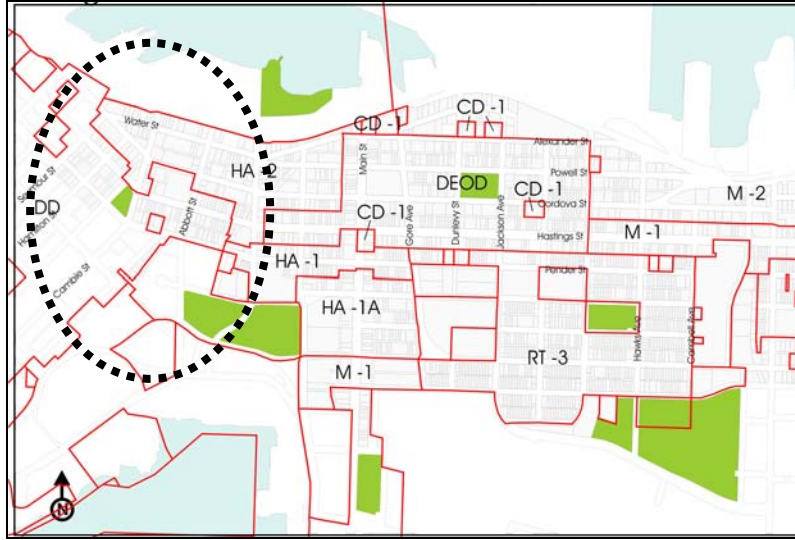
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Map 4 - DD zone in the DTES



The portion of DTES which falls within the DD has the following uses permitted: Hotel; Light Industrial; Office Commercial; Other Commercial, including a Body-Rub Parlour; Parking Area and Parking Garage; Parks and Open Space; Public and Institutional; Residential; Retail Commercial; Social, Recreational and Cultural, including Casino - Class 1 and Bingo Hall.

It is also noted that Hastings and Abbott Streets are marked as "Continuous ground floor retail, retail-commercial and service uses required." This area is also designated for a maximum overall density of 5.00 fsr, and a maximum building height of 150 feet.



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3.0 INVENTORY ASSESSMENT

3.1 *Introduction*

In June of 2004 Hudema Consulting Group, through the Fast Tracks Employment Agency, hired an individual to conduct an inventory of all land uses on the Downtown Eastside. The inventory was started using the BC Assessment roll of all properties that fell within the DTES study area boundary. To this database, the inventory employee added a number of fields:

- Number of floors
- Linear frontage (approx.)
- Name of Establishment
- Type of Establishment

These records were added to all non-residential uses, and in many cases new records were added to the database to indicate multiple uses within a single building. After all of the filed work was completed, the database was input into a spreadsheet, coded by NAICS codes, and made mappable using a MapInfo GIS system. The maps in this section were created using the newest inventory database, which is now available to the City for use in their ongoing recording of economic activity in the DTES.

One of the difficulties encountered in the inventory process was identifying what uses were on floors above the first floor, in back rooms, behind locked gates, or in buildings with no signs on them. In many cases there were buildings that were vacant, and they were recorded as such.

In retailing and most commercial activities that serve the general public, ground-level locations are far preferred over basement or above-ground floors. However, in the DTES there are buildings that have commercial space that is accessed via a ground-level door, but occupy multiple floors. Most of the hotels, for instance, have several floors, and are considered a commercial activity. Woodward's, the largest single building in this survey, is designed as retail space and occupies many floors. In order to effectively inventory these spaces and to understand the retail potential, it was decided that if the building had retail uses on the main floor which was directly connected to contiguous space on other floors that appeared to be a continuation of the retail, all floors would be considered retail space. On the other hand, if the upstairs floors were connected to non-commercial or non-retail on the main floor, none of the space was considered to be retail. The main instances in which this becomes relevant are Woodward's, Army & Navy, and the many hotels in the Gastown and Victory Square sub-areas primarily. Hotels are not considered available for retail.

Woodward's is a unique case. The building has been vacant for over a decade, but there is now a development plan that would see the site converted to a mix of uses including residential, retail, and possibly education uses. Under the proposal, between 30,000 and 70,000 square

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feet of retail uses could be located on the site after redevelopment. As such, while Woodward's is currently a 568,000 square foot vacant department store, for the purposes of this analysis and to ensure this report is usable as a strategic planning resource into the future, we have considered Woodward's to be 70,000 square feet of vacancy.

The most dramatic information gathered in the inventory was the large volume of vacant building area, at 619,000 square feet.

The inventory recorded a total of over 5 million square feet of space, including commercial, industrial, some institutional, and even residential space that was primarily at-grade. Roughly 40 percent of this is considered retail, service, or vacant uses.

3.2 Inventoried Space

The following sections describe the main findings of the inventory in each sub-region, and for the DTES as a whole.

3.2.1 Downtown Eastside

As discussed above, nearly 5 million square feet of space was inventoried in the DTES, and was coded by its use according to the North American Industry Classification System (NAICS). The 6-digit NAICS codes were then aggregated into 3-digit code groups (Appendix 3) for the following analysis.

NAICS Code Aggregation

The grouping of the NAICS codes was done in order to aggregate the nearly 1,200 NAICS classifications into 103 broader groups. This way, we are able to display and discuss the different uses of space in the DTES, whereas 1,200 use categories would be too specific to be useful in this section. For example, the following table shows that the first category in the 2-digit NAICS table is Agriculture, Forestry, Fishing and Hunting. In the 3-digit NAICS grouping, that category is broken into 5 separate categories. The 6-digit NAICS is the most specific, and is separated into 64 different types of businesses. In the DTES inventory we coded all uses by the 6-digit level of detail, but aggregated them to the 3-digit level for the analysis.

2-digit NAICS	3-digit NAICS	6-digit NAICS
11 Agriculture, Forestry, Fishing and Hunting	111 Crop Production	111110 Soybean Farming
	112 Animal Production	111120 Oilseed (except Soybean) Farming
	113 Forestry and Logging	111130 Dry Pea and Bean Farming
	114 Fishing, Hunting and Trapping	111140 Wheat Farming
	115 Support Activities for Agriculture and Forestry	111150 Corn Farming
		111160 Rice Farming
		111191 Oilseed and Grain Combination Farming
		111199 All Other Grain Farming
		111211 Potato Farming
		111219 Other Vegetable (except Potato) and Melon Farming
		111310 Orange Groves
		(plus 63 other categories)

The dominant use (or non-use) of space in the DTES that is or could be used for retail or commercial uses is vacant building area. Of the 4.97 million



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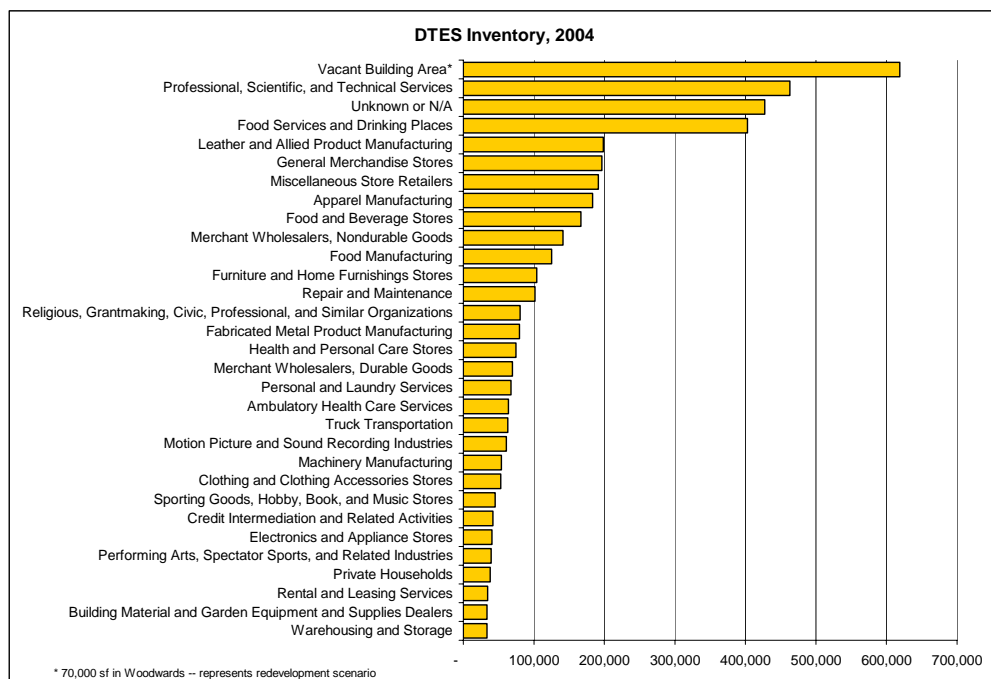
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square feet inventoried, nearly 20 percent, or 944,000 square feet are vacant. If we do not include Woodward's in this calculation, vacant building area represents a more reasonable 376,000 square feet, or 7.5 percent of the inventory.

If we consider only the vacant building area and the retail and service commercial uses (NAICS: 442-453, 517, 522, 722, 812), the total supply of retail and service commercial floor area in the DTES is slightly over 2,050,000 square feet. For our purposes for the remainder of this study, this number will represent the current supply of retail and service commercial space.

Using this more appropriate total supply value, the vacant area of 618,700 amounts to a 30 percent vacancy rate. Vacancy rates of 10 percent are typically considered high in most neighbourhood shopping areas. This vacancy total assumes 70,000 square feet of vacancy in the redeveloped Woodward's building. This is not to say that we anticipate vacant retail area in the redeveloped project. But at the time of writing, rather than considering all 568,000 sf vacant in the existing structure, and with the potential that the new 70,000 sf retail will be filled by tenants currently in the market, it is reasonable to consider the space vacant at this time.

The following chart shows the ranking of uses by the amount of building area they account for in the DTES. As discussed, vacant building area is the largest single use, followed by professional, scientific, and technical services (463,000 square feet), Unknown or Not Applicable (427,000 sf), and Food Services and Drinking Places (403,000 sf). Professional, scientific, and technical services and Food Services and Drinking Places account for the largest productive uses of space, and combine to represent 35 percent of the total retail and service commercial supply.



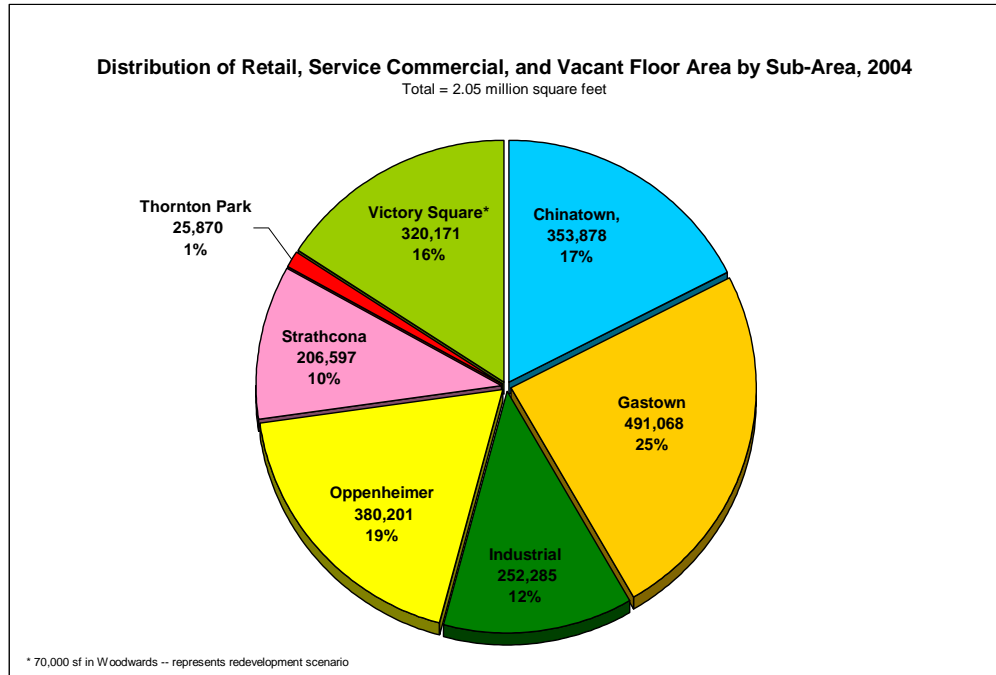
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The chart below shows how this space is distributed by sub-area. Gastown claims the largest share, with 25 percent of the retail and service commercial floor area in the DTES. Oppenheimer, Victory Square and Chinatown each have 17 to 19 percent of the space. Strathcona, the primary residential district in the DTES is the location for only 10 percent of the retail and service commercial floor area in the DTES.



3.2.2 Gastown

The most predominant commercial use in Gastown is the Museums, Historical Sites, and Similar Institutions, which has over 200,000 square feet of space in this sub-area. The new Storyeum project accounts for 100,000 square feet of this total. The food services and drinking places category is second-largest in Gastown, with 136,000 square feet, or 16.5 percent of the 822,000 square feet in Gastown.

The third-largest use is accounted for by a single retailer - Army and Navy. This store on Cordova Street actually occupies two buildings, one on Cordova which is in the Gastown sub-area, and one on Hastings which is in the Victory Square sub-area. Combined, these two stores have almost 180,000 square feet of space, according to BC Assessment. For the subarea discussion, only 114,000 square feet is in Gastown, and is a general merchandise store.

It is apparent from this merchandise mix profile that the Gastown commercial businesses cater largely to a tourist market



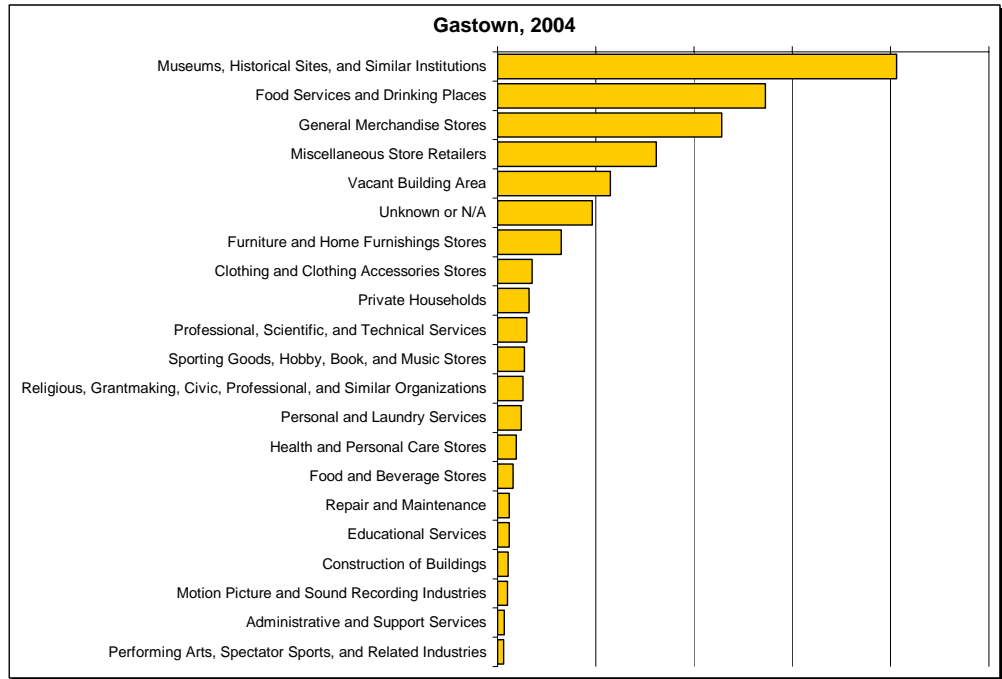
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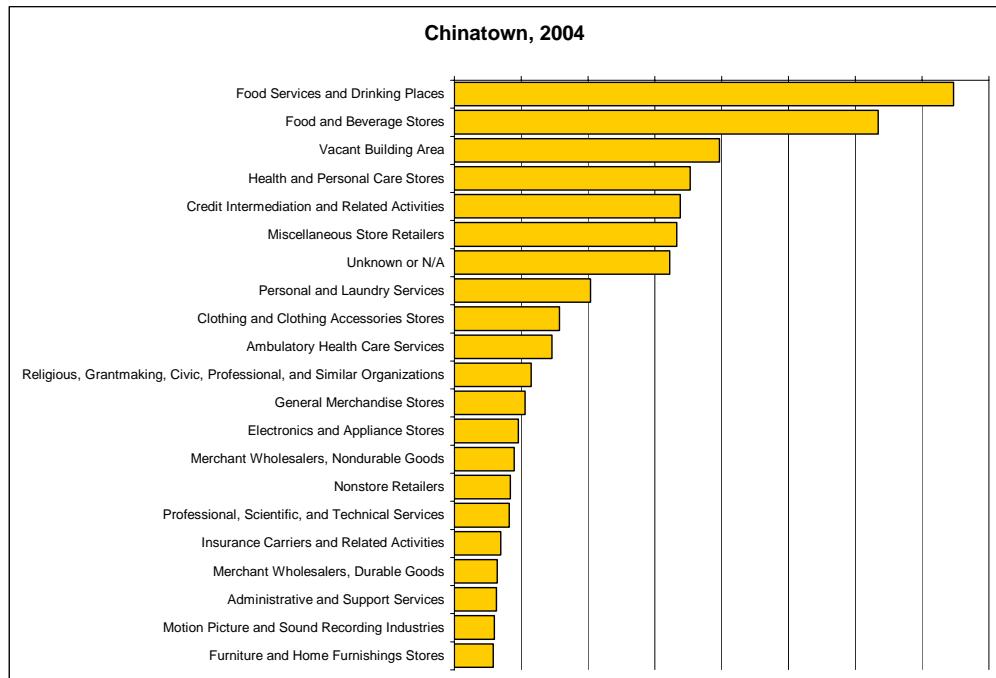
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3.2.3 Chinatown

The dominant category of retail and service commercial uses in Chinatown is food services and drinking places (74,700 sf). This includes restaurants, bars, cafes, fast food kiosks, and other food and drink preparation and service places. The next most prolific types of business is food and beverage stores (63,400 sf), followed by vacancies (39,700 sf), and health and personal care stores (35,300 sf).

The merchandise mix in Chinatown demonstrates a unique blend of local convenience services and products, but at a scale that mean it serves a much larger area than the local population. Intuitively this is understandable given the unique products, ethnic specialty foods, imported products, and restaurant fare that can only be found in a few locations in the Lower Mainland, and none so concentrated as Chinatown.



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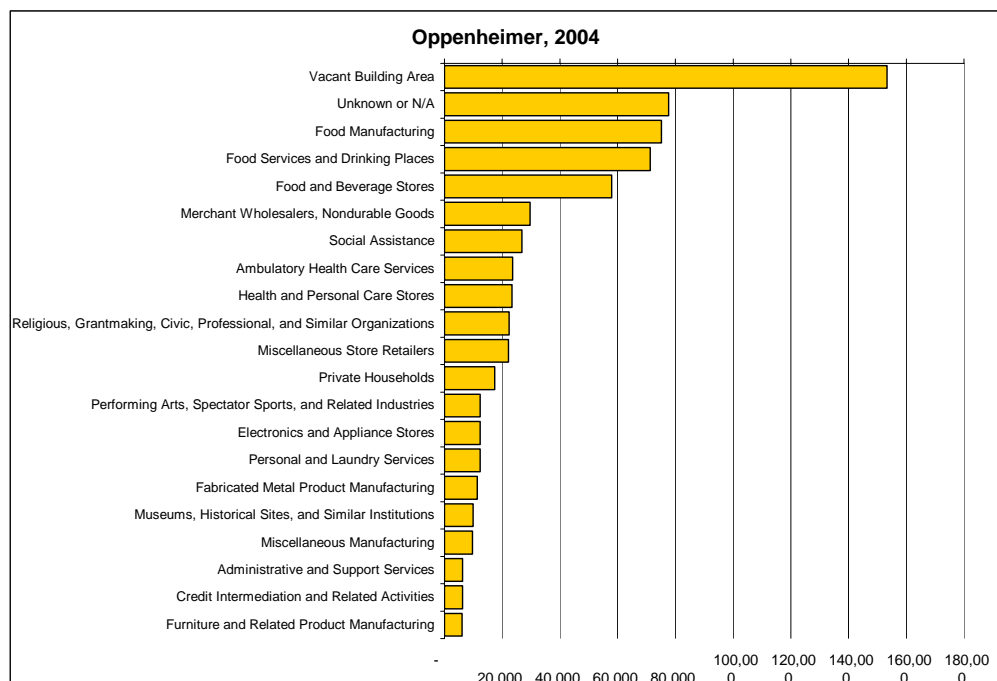
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3.2.4 Oppenheimer

Oppenheimer is the focus of much of the social problems in the DTES. As such, the retail and ground floor commercial space that was built when the community thrived is now vacant as the retail and service commercial conditions in the area are difficult to operate in. The largest single vacant space in Oppenheimer is less than 15,000 square feet. The majority are 2,000 to 4,000 square foot spaces, predominantly on East Hastings, Alexander, and Powell Streets, adding up to 141,000 square feet of vacancy.

In addition to the large vacant area, a further 77,700 square feet are in space that appears occupied, but the use is not evident, or is unclassifiable.

The third-largest use in Oppenheimer, which by definition in this inventory occupies space that is appropriate for retail or service commercial uses, is food manufacturing. Food Services and Drinking places (71,300 sf), and Food stores (58,000 sf) also comprise significant amounts of space in Oppenheimer.



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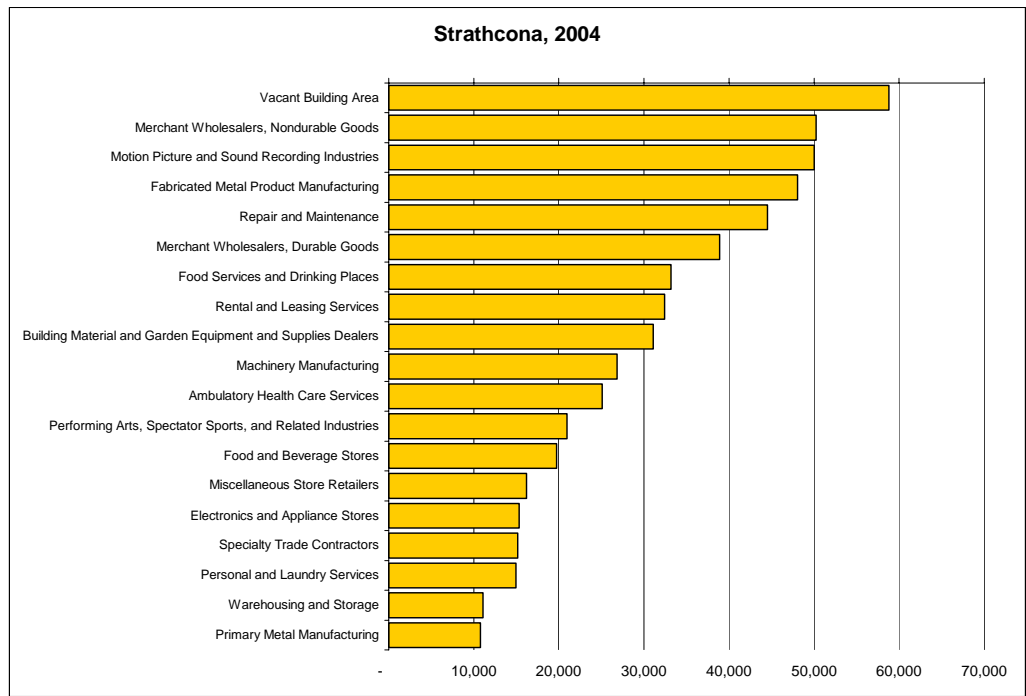
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3.2.5 Strathcona

Strathcona has very little retail and service commercial uses. Rather, much of its streetfront space is occupied by non-retail uses. The largest of these uses is Merchant wholesalers of non-durable goods. These are mainly food wholesalers, and they occupy over 50,200 square feet. Motion picture and sound recording industries occupy 50,000 square feet, and fabricated metal manufacturing industries occupy 48,000 square feet.

Food services and drinking places are the largest service commercial use (33,210 sf), and vacant building area amounts to over 58,000 square feet.

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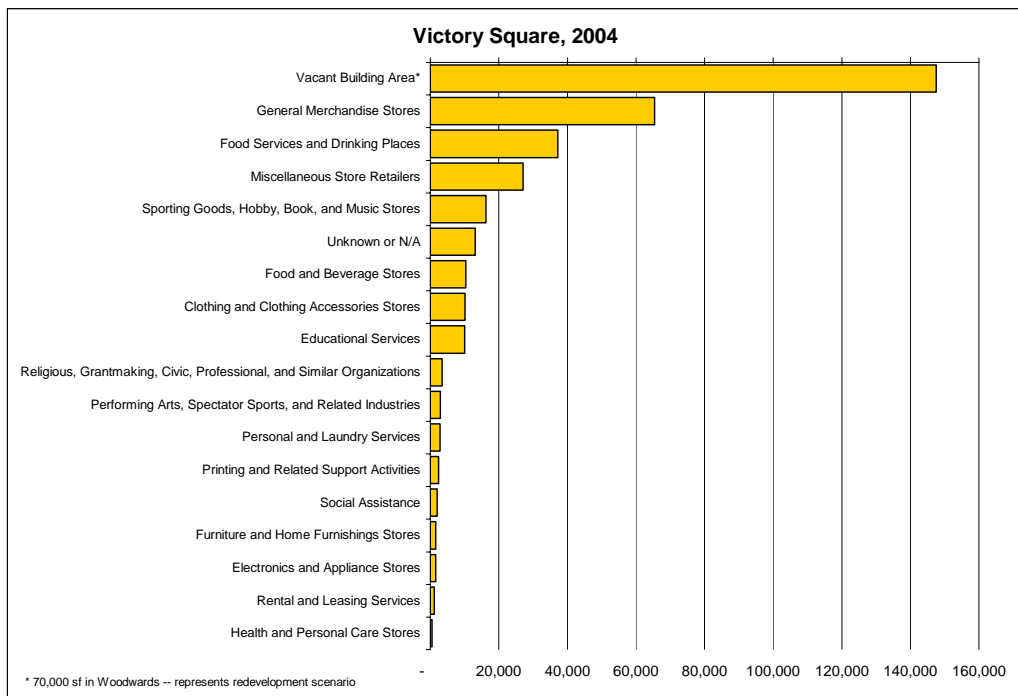
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3.2.6 Victory Square

As discussed briefly above, the vacant building area in Victory Square is dominated by the 70,000 square foot vacancy at Woodward's. Vacant Space in this sub-area totals 147,200 square feet, or 24 percent of the vacant space in the entire DTES. The largest type of productive use in this sub-area is General merchandise stores, which is the 65,000 square feet in the second Army & Navy building on Hastings Street.

Food services and drinking places account for 37,200 square feet, followed by miscellaneous store retailers (27,000 sf), which includes used merchandise stores and pawn brokers, and sporting goods, hobby, and book stores (16,200 sf).



The following maps show the 2004 inventory of uses by type and location. Appendix 3 at the end of this document shows the 3-digit NAICS categories which correspond to the categories used to group and display on these maps.



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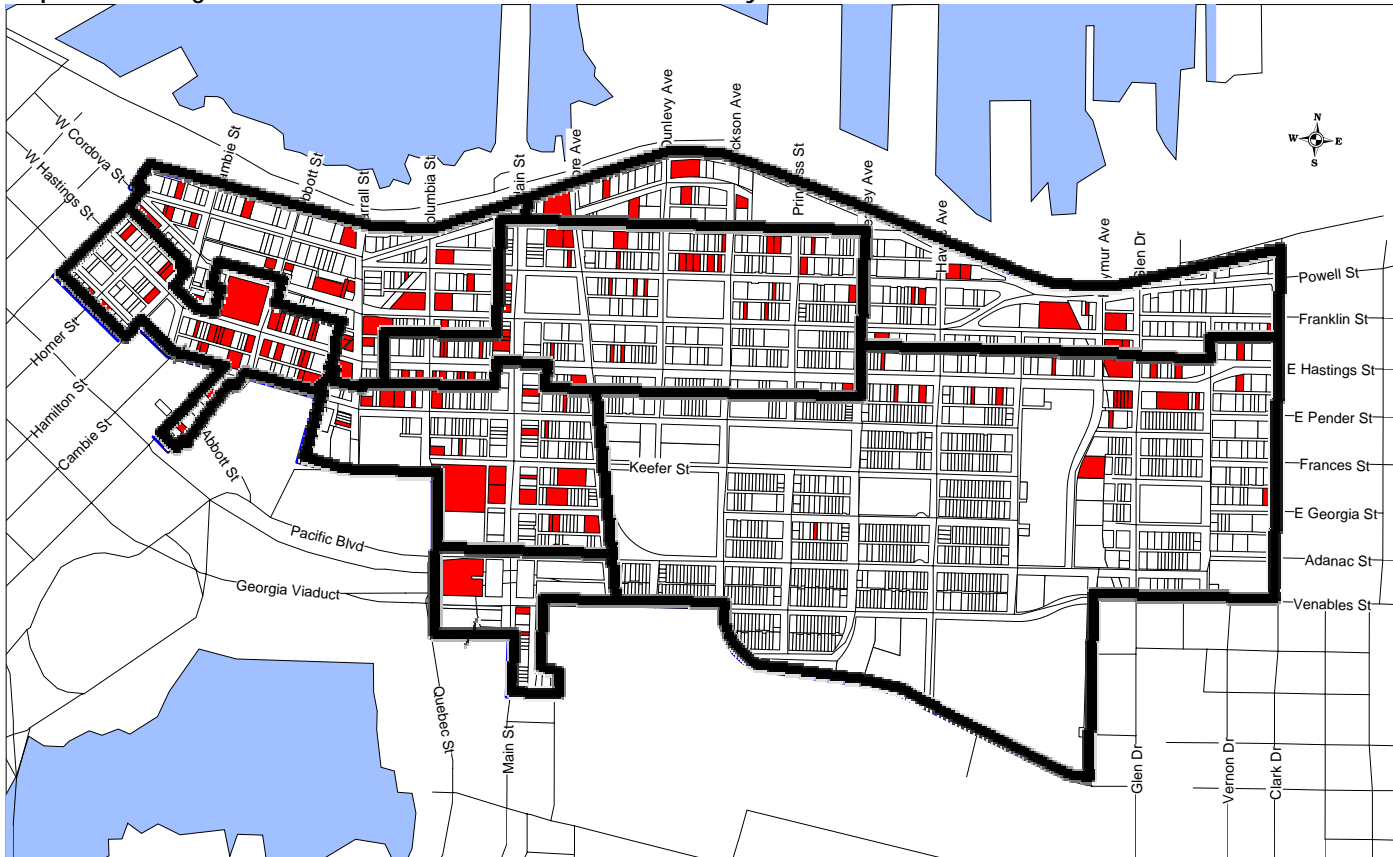
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3.3 Inventoried Uses

The following maps show the distribution of some of the uses that were recorded in the inventory. The first map shows lot outlines on the DTES, with red lots denoting properties that have vacant building area that is currently or could be used for retail or service commercial businesses. Not all of the red sites are completely vacant, but at the time of the inventory in mid-2004, they had vacant space within them. Many of the buildings with vacant retail commercial space are located in the Victory Square sub-area, indicating a weak retail environment in this area.

Map 5 - Buildings with Retail or Service Commercial Vacancy Potential

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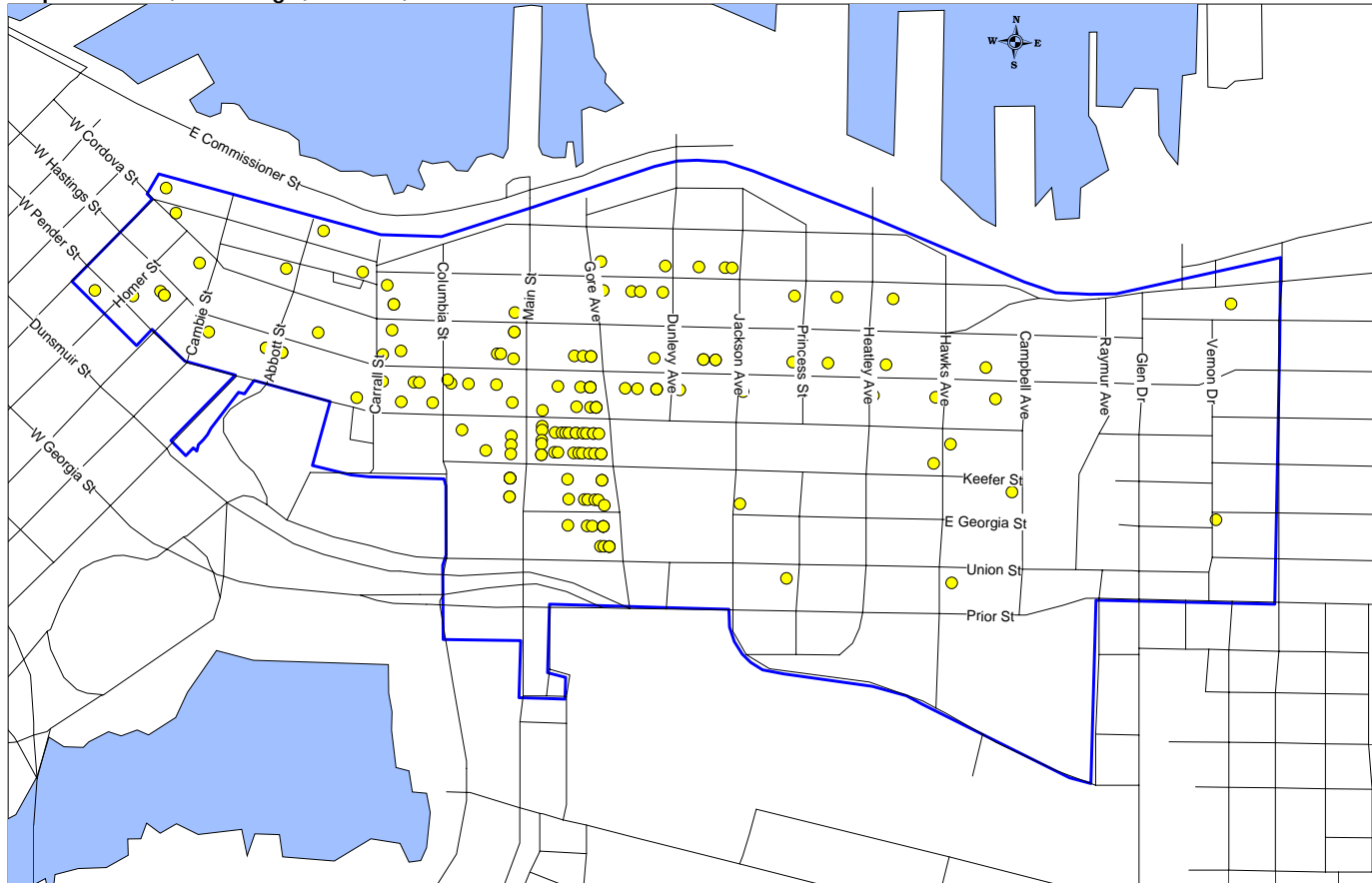
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Food, Beverage, Health, Personal Care Stores (NAICS 445-446)

Food, beverage and personal care stores are the most important commercial ingredients to establishing a residential neighbourhood. This map shows a very distinct clustering of food, beverage, health and personal care stores in Chinatown. These uses can be either convenience or destination-type products, depending on their level of specialization and their target market. The clustering shows that Chinatown is a focus for these product ranges and likely is able to attract shoppers from a wide trading area for the opportunity to comparison shop and for the variety.

Map 6 - Food, Beverage, Health, Personal Care Stores



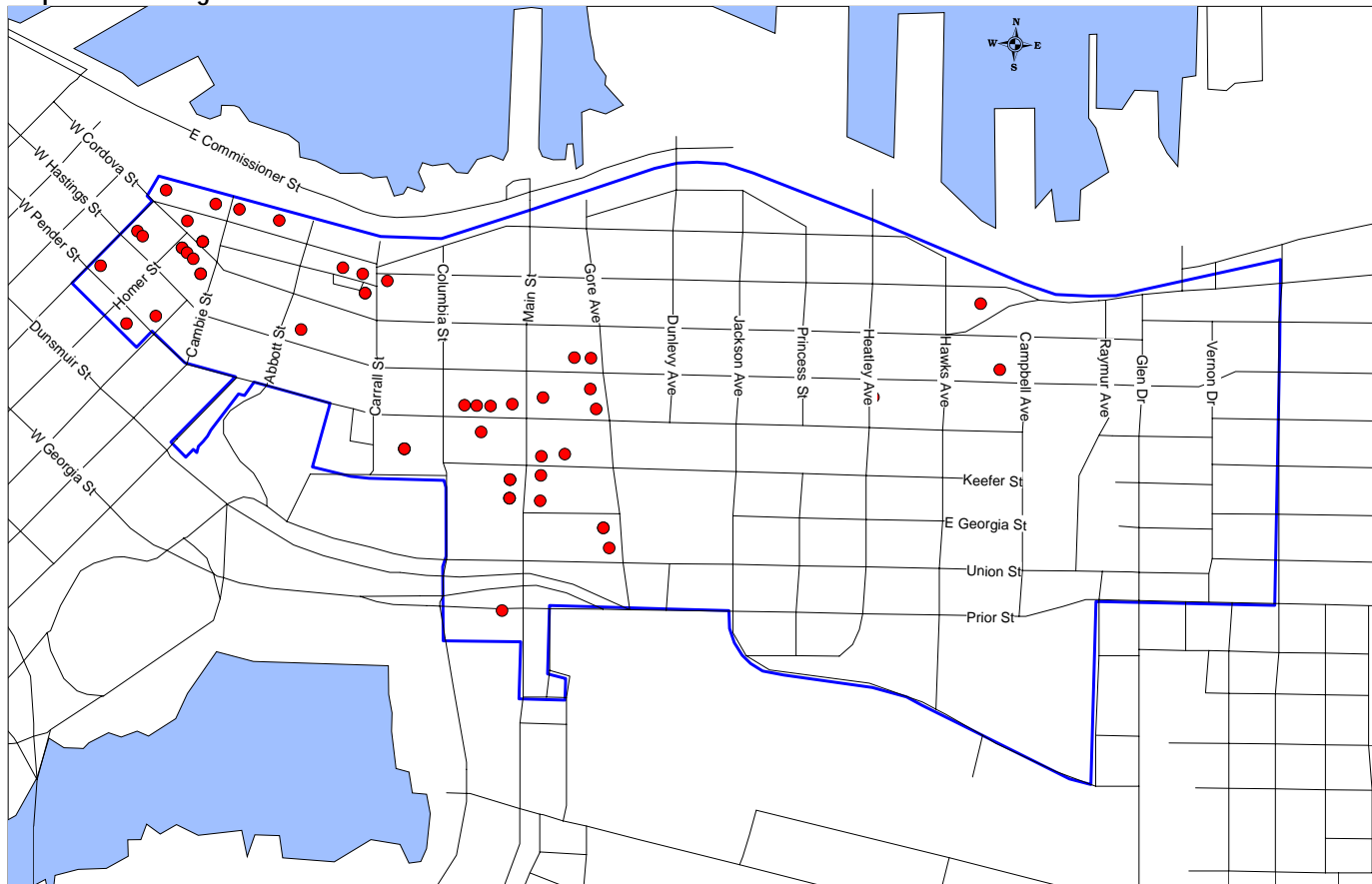
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Clothing & Accessories Stores (NAICS 448)

Clothing and Accessories stores are often considered a higher order product type that is well served to be located in a competitive environment that will attract shoppers for selection and comparison shopping. Shopping malls offer these advantages, for example. This map shows two distinct zones of clothing and accessories retailing on the DTES - Chinatown and the western end of Gastown and Victory Square sub-areas, focusing on West Cordova at Homer St.

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Map 7 - Clothing & Accessories Stores



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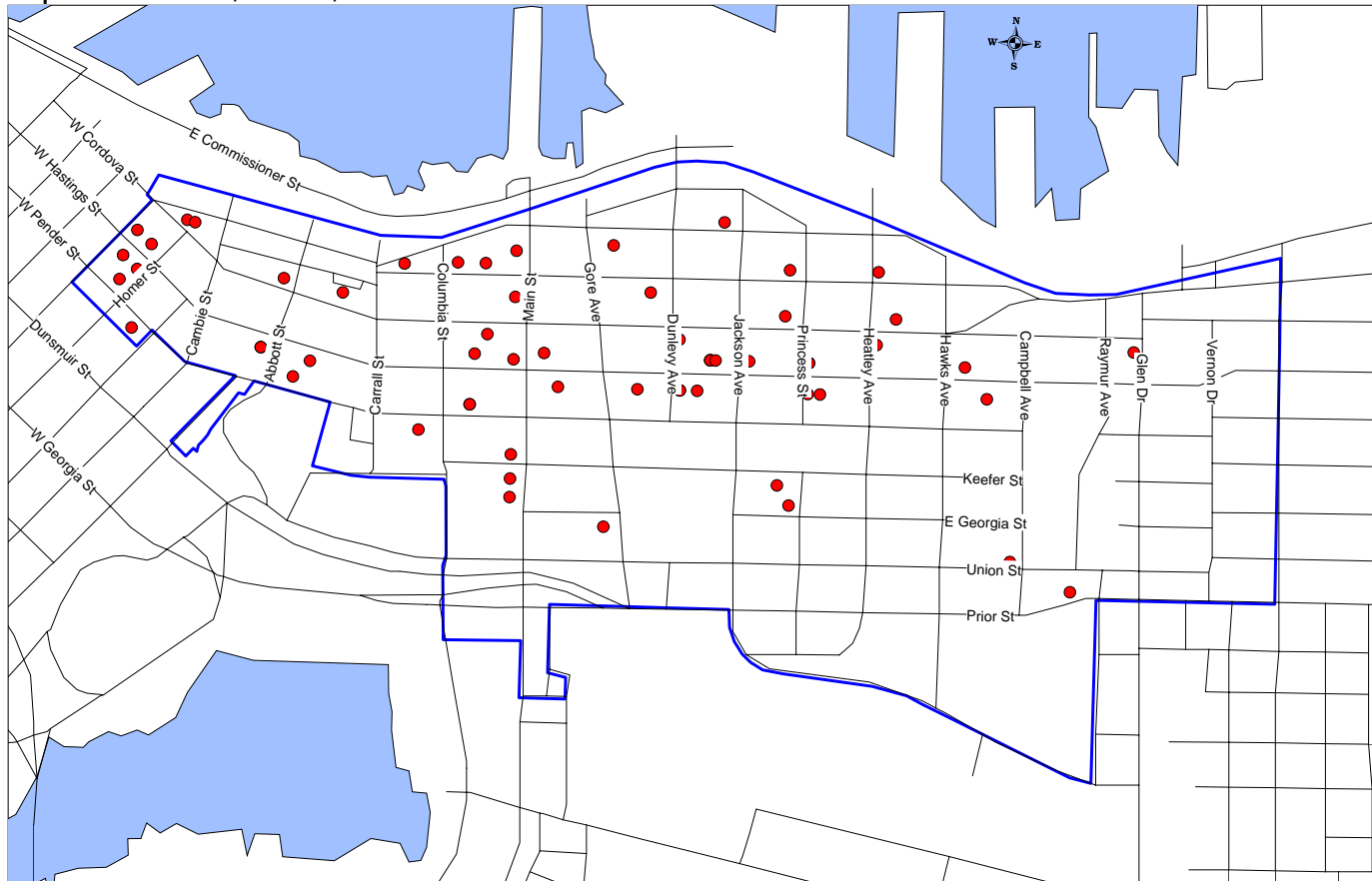
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Education, Health, and Social Assistance (NAICS 611-624)

This map shows the fairly uniform distribution of the NAICS 600's codes, which include educational services, ambulatory health care services, hospitals, nursing and residential care facilities, and social assistance. While the category is somewhat broad, this does provide a demonstration of the uniform distribution of education and aid across the DTES. More detail on these uses is shown in Section 6.0.

Map 8 - Education, Health, and Social Assistance

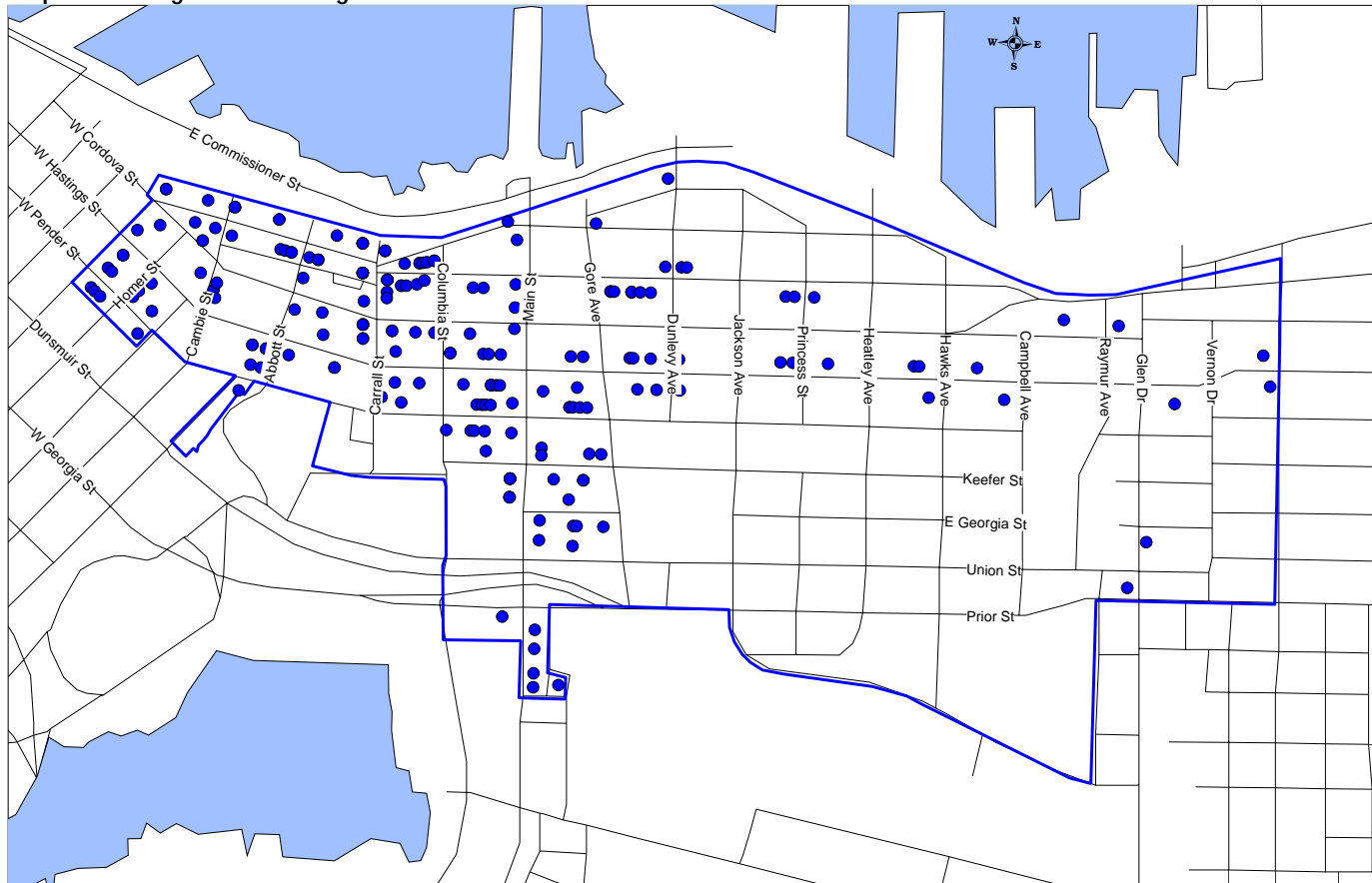


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Eating and Drinking Places (NAICS 722)

Eating and Drinking places are one of the most common groups of establishments in urban areas in Canada. Chinatown and Gastown are the principal locations for these establishments on the DTES, with particularly dense clustering on Powell Street between Carrall and Columbia, on Pender Street in Chinatown, and along much of the lengths of Cordova and Hastings streets. While these are population-serving businesses, the population base of Strathcona is largely un-served within the community

Map 9 - Eating and Drinking Places



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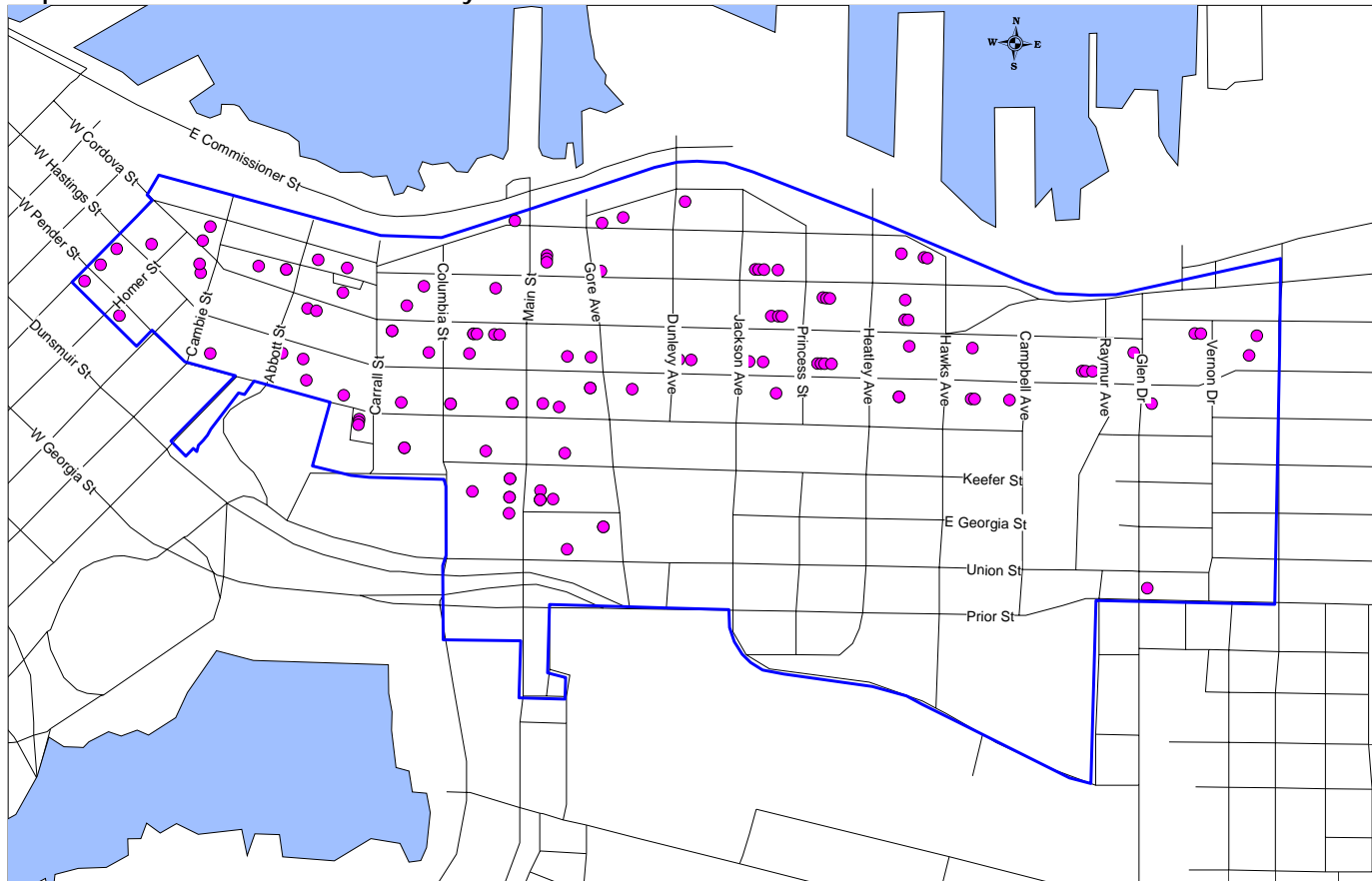
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Personal Services & Laundry (NAICS 812)

Personal services such as barbers and beauty salons, photography services and parking lots appear to be equally distributed across the DTES, but have some interesting characteristics. There are virtually no personal services within the neighbourhoods of Strathcona; and these uses cluster into small groups. In a number of places on the map below it is apparent that personal service uses may benefit from the co-location of other similar uses, or other personal services that can be patronized in the same trip. About a dozen of these mini clusters are also visible.

Map 10 - Personal Services & Laundry



4.0 MARKET DEMAND

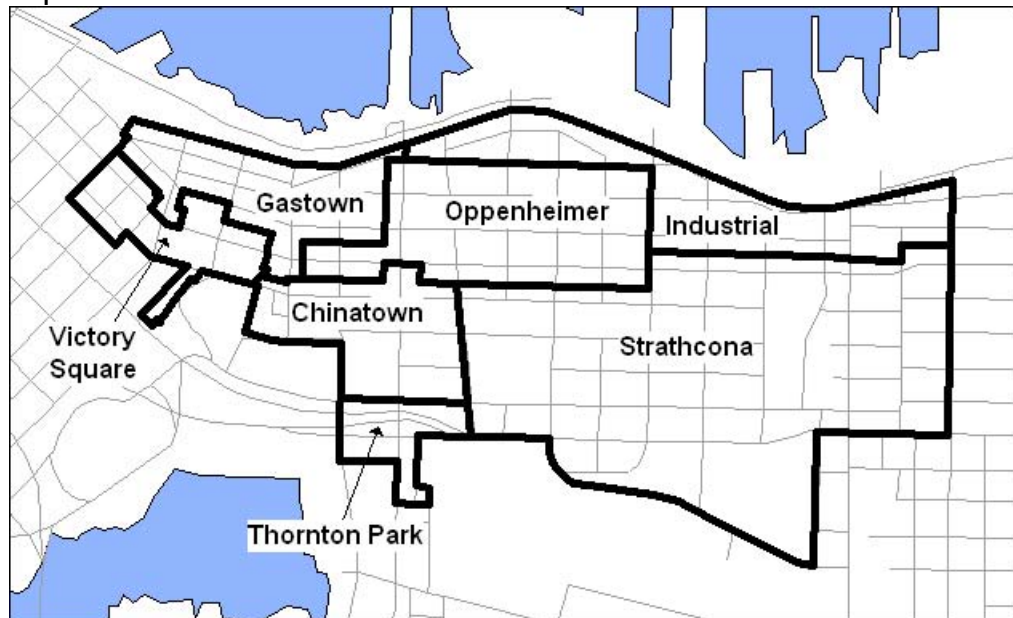
4.1 Introduction

The demand for retail and service commercial uses in an area is based largely on the population and specific demographic characteristics of the residents. Commercial areas have smaller or larger trade areas based on the products available, the amount of space, and the degree of competition. This study identifies the amount of commercial space that is supportable by the residents of the DTES community. As such, we have used the resident population as the customer base, and discussions about tourism, inflow, outflow, and capture rates follow later.

4.2 Trade Area Delineation

The trade area under consideration in this analysis of retailing in Vancouver's Downtown Eastside is the Downtown Eastside (DTES) itself. The trade area is subdivided into seven "sub-areas": Gastown, Victory Square, Chinatown, Thornton Park, Oppenheimer, Industrial and Strathcona.

Map 11 - DTES Sub-Areas



4.2.1 Trade Area Population & Demographics

The trade area had a population of 15,789 in 2001, according to the Canada Census. The following table provides an idea of the basic descriptive elements of the DTES population.



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	Downtown East Side	
Total Population	15789	% base
Males	9,665	61%
Females	6,124	39%
2001 Population by Age	15789	% base
0 to 4 years	323	2%
5 to 19 years	1,292	8%
20 to 24 years	701	4%
25 to 34 years	2,289	14%
35 to 44 years	3,308	21%
45 to 54 years	2,783	18%
55 to 64 years	1,691	11%
65 to 74 years	1,726	11%
75 to 84 years	1,230	8%
85 years and over	532	3%
Average age of population	46.5	
Median age	45.1	
Dominant age group	35 to 44 years	
Families	2,119	% base
Persons per family	2.8	
Two-parent families	1,672	79%
With no children at home	928	44%
With children at home	708	33%
Lone-parent families	462	22%
Total children at home	2,124	
Children per family	1	
Households	10574	
Persons in private households	14579	
Persons per household	1.4	
Average 2000 household income	\$20,858	
Occupied Dwellings	10585	% base
Owned Dwellings	955	9%
Rented Dwellings	9,092	86%
Single detached houses	444	4%
Semi-detached/row/duplex	748	7%
Apartments	9,335	88%
Movable dwelling	18	0%
Dominant building type	Apartments	



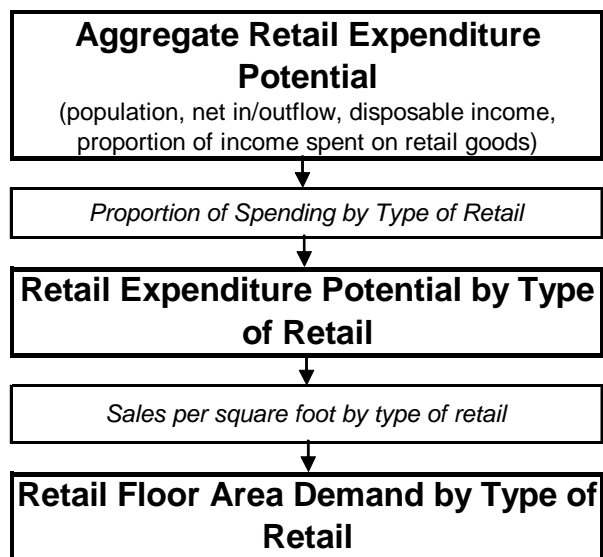
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4.3 Market Demand

An area's demand for retail and service commercial businesses is determined through a demand model that uses population, demographic variables, and industry statistics. The total population is multiplied by the average per capita disposable income to generate a total aggregate disposable income for the area. The aggregate is then reduced by a factor that is a ratio between disposable income and retail spending (usually around 45-50 percent). A net inflow/outflow factor (10 percent) is then applied, which anticipates either a net inflow or outflow of retail spending. The result is the total retail spending potential. This amount is then distributed among the categories of retail commodities using a distribution profile from a monthly Statistics Canada publication (63-005-XIB). This distribution gives the profile of spending by commodity, which is then converted to retail floor area using current revenues per square foot statistics from industry sources. The following flow chart shows a simplified process of the retail demand calculation.



4.3.1 Retail Expenditure Potential

Retail expenditure potential is a measure of an area's ability to support retail and service establishments and, as such, is the first step in determining the total potential retail demand for any given area. The retail expenditure potential of a defined area is a product of a population's size, its income, and overall retail expenditure patterns.

To determine the commercial space requirements for this market area, it was first necessary to estimate the personal disposable income of the current and trade area populations. Personal disposable income (PDI) is the measure of capital available for expenditures and represents approximately 80 percent of total income, allowing for taxes and other transfers.



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In terms of the demographic and socio-economic composition of the residential population, 2001 Census data has been examined. The personal disposable income of \$13,969 in 2001 was approximately 38 percent less than that seen at the provincial level (\$22,613).

The next step in determining the retail expenditure patterns of the trade area residents is the utilization of a retail-to-personal disposable income (PDI) ratio. This ratio describes the proportion of PDI that an aggregate population will typically spend on retail goods. The ratio for the province of BC was 46.2 percent at mid-year 2003. As it is almost certain that the residents of the various DTES sub-areas will have income levels lower than the provincial average, a range of PDI ratios have been assumed (lower income households generally spend a greater proportion of total income on retail goods and services and, as such, have a higher PDI ratio). The following table lists PDI ratios assumed for each of the DTES' seven sub-areas.

Sub-Area	PDI Ratio
Chinatown	51.5
Gastown	46.6
Industrial	44.1
Oppenheimer	51.2
Strathcona	50.5
Thornton Park	48.9
Victory Square	51.1

Source: Hudema Consulting 2004

Downtown Eastside

The current DTES population is estimated at 16,000. This reading may understate the true population of the area, as many of the residents of the DTES may not be captured in the census enumeration. The per capita disposable income of these people was estimated at \$13,339 - one of the lowest in Canada.

Based on the above estimates of population and income, and retail expenditure patterns provided by Statistics Canada, the DTES population generates an estimated \$89.5 million of retail expenditures in 2004.

As shown in the following table, the food and convenience (Supermarket and Other Food & Convenience spending) portion of retail expenditures accounts for approximately \$35.6 million in 2004.

RETAIL EXPENDITURE POTENTIAL, 2004 DOWNTOWN EAST SIDE	
	2004
Supermarket	\$ 26,939,975
Other Food & Convenience	\$ 8,614,118
DSTM	\$ 39,105,052
Automotive Parts	\$ 14,798,133
Total Retail	\$ 89,457,278

Source: Hudema Consulting Group Limited - June 2004



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At the same time, department store type merchandise (DSTM) spending is estimated to total just over \$39 million in 2004. Automobile parts and associated expenditures are anticipated to be \$15 million. Detailed spending projections have been included in the following table, which includes spending on vehicles.

RETAIL EXPENDITURE POTENTIAL, 2004 DOWNTOWN EAST SIDE	
	2004
POPULATION	15,790
INCOME (PDI)	\$ 13,340
TOTAL INCOME POTENTIAL	
	\$210,638,600
RETAIL SALES / INCOME	50.0%
Inflow	10%
TOTAL RETAIL POTENTIAL	
	\$115,904,010
FOOD AND CONVENIENCE	
Supermarkets	\$26,939,975
Other Food Stores	\$1,964,015
Drug Stores	\$6,650,104
Subtotal	\$35,554,093
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$12,632,006
Apparel and Accessories	\$5,986,941
Women's	\$1,692,759
Men's	\$408,143
Other Clothing	\$3,222,876
Shoes	\$663,163
Home Furnishings	\$7,830,024
Semi-Durables	\$3,471,737
Durables	\$3,417,710
Other Retail	\$5,766,633
Subtotal	\$39,105,052
AUTOMOTIVE	
Vehicles	\$26,446,732
Parts, Gas, & Service	\$14,798,133
Subtotal	\$41,244,865
TOTAL RETAIL	
	\$115,904,010

Source: Hudema Consulting Group Limited - June 2004



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Sub-Areas

A summary of retail expenditures in the DTES's various sub-areas includes the following notable facts:

- Despite having a population of less than 600, per capita incomes of just over \$10,000, and a resultant total Retail Expenditure Potential of \$3.25 million, Chinatown represents one of the largest clusters of retail uses in the DTES.
- Gastown has a relatively important population of over 2,600. This total is likely growing due to new condominium construction. Per capita incomes are relatively high in the area, at \$20,698. Gastown, like Chinatown represents a disproportionate amount of the retailing in the area as a whole due to its tourist destination and heritage status. Retail expenditures from Gastown residents total \$28 million.
- The Industrial strip along the north edge of the DTES has virtually no population (under 100) and has total retail expenditures of just over \$1 million.
- The Oppenheimer district has a relatively large population of 5,000 and relatively small per capita incomes of \$10,792. Total expenditures in the sub-area are in excess of \$31 million, representing a significant share of DTES spending as a whole.
- Strathcona is the DTES's most highly-populated sub-area (6,000). Incomes are low, averaging \$12,414 per annum. Despite this, total expenditures of residents of Strathcona are approximately \$41 million per year, representing the most important single resident base in the DTES. This total can be expected to increase slowly, as the Strathcona neighbourhood continues to undergo gentrification.
- The Thornton Park sub-area has a low population (under 500) and middling incomes of \$15,833. The total retail expenditures in the sub-area are estimated at \$3.5 million.
- The Victory Square district has a relatively low population of approximately 1,200, and a low per capita income, at \$11,018. The resultant retail expenditure potential is greater than \$7 million. This district may also see increasing income and population numbers, due to its close proximity to the CBD, its developing education cluster, and its large stock of heritage buildings.

Detailed Retail Expenditure Potential tables for each of the Downtown Eastside's seven sub-areas are provided in Appendix I.

4.3.2 Warranted Retail Floor Area

The total retail expenditure potential in a specified trade area is translated into the amount of retail floor area that can be supported by the trade area population through the application of per square foot sales

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requirements to individual expenditure categories. The sales requirement estimates used in this analysis are considered to be the threshold levels which retailers would like to capture.

The following sections show market shares that are used to determine the amount of floor area that could be supported in the Downtown Eastside. The assumed market share for DTES commercial is included at 60 percent for the food and convenience trade and 50 percent for the DSTM trade

This market share range of 50 to 60 percent represents a balance between the following factors:

- The low mobility of residents of the Downtown Eastside and their subsequent likelihood to shop within the trade area;
- The close proximity of DSTM destinations, due to the central location of the trade area within Vancouver's inner-city;

Downtown Eastside

The current population of the DTES creates a demand for a total of almost 342,000 square feet of gross commercial floor area. This represents a small demand when compared to the large inventory of retail space in the DTES.



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GROSS WARRANTED RETAIL FLOOR AREA, 2004 DOWNTOWN EAST SIDE			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	48,982
Other Food Stores	\$350	100%	5,611
Drug Stores	\$500	100%	13,300
Subtotal			67,893
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	50,528
Apparel and Accessories			
Women's	\$350	100%	4,836
Men's	\$375	100%	1,088
Other Clothing	\$350	100%	9,208
Shoes	\$400	100%	1,658
Home Furnishings	\$285	100%	27,474
Semi-Durables	\$350	100%	9,919
Durables	\$375	100%	9,114
Other Retail	\$350	100%	16,476
Subtotal			130,302
Auto Parts	\$500	100%	29,596
TOTAL RETAIL	\$0		227,792
Service Commercial			113,896
TOTAL COMMERCIAL			341,688

Source: Hudema Consulting Group Limited - June 2004

It is reasonable to assume that a portion of total retail spending will occur in other commercial centres, and a correspondingly smaller market share will be "captured" locally at commercial facilities within the Downtown Eastside. In applying realistic market capture rates to retailers within the DTES, it is our estimate that up to 50 percent of the department store type merchandise (DSTM) and 60 percent of the food and convenience type merchandise (FCTM) expenditure potential will be retained within the DTES itself.

Given these market share capture rates, it can be assumed that about 121,000 square feet of net warranted retail space could be supportable within the DTES. Service commercial uses such as restaurants, fast food retailers, professional offices and personal service retailers (drycleaners, barber, key shop, beauty, etc.) typically represent between 25 and 50 percent of the net warranted retail floor area in smaller commercial projects. Given the convenience nature of the retail uses that might be



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expected to locate within the development, it may be reasonable to expect that as much as 35 percent of the initial warranted retail area could be added for service commercial activities, translating into 60,000 square feet of supportable service commercial uses.

NET WARRANTED RETAIL FLOOR AREA, 2004			
DOWNTOWN EAST SIDE			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	60%	29,389
Other Food Stores	\$350	60%	3,367
Drug Stores	\$500	60%	7,980
Subtotal		60%	40,736
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	25,264
Apparel and Accessories			
Women's	\$350	50%	2,418
Men's	\$375	50%	544
Other Clothing	\$350	50%	4,604
Shoes	\$400	50%	829
Home Furnishings	\$285	50%	13,737
Semi-Durables	\$350	50%	4,960
Durables	\$375	50%	4,557
Other Retail	\$350	50%	8,238
Subtotal		50%	65,151
Auto Parts	\$0	50%	14,798
TOTAL RETAIL			120,685
Service Commercial		50%	60,343
TOTAL COMMERCIAL			181,028

Source: Hudema Consulting Group Limited - June 2004

Sub-Areas

The following table is a description of the warranted retail floor area in each of the Downtown Eastside's seven sub-areas. These numbers are the result of population-driven demand plus a net inflow factor, as described, and at sales per square foot rates shown in the table above, which are for typical new retail in urban environments. The difference between sub-area demand on the following table and current supply is accounted for by highly variable inflow/outflow rates, different and likely significantly lower sales performance rates. Our recommendations will not reflect any intention for the retail supply to mirror demand exactly, as that would



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ignore the significant inflow trade, particularly in Gastown and Chinatown. Rather, the demand values are an indication of the resident support for retail and service commercial uses, and offer insight into the amount of floor area that is required at a bare minimum, to serve the sub-area population.

Sub-Area	Warranted Floor Area
Chinatown	9,581
Gastown	82,412
Industrial	3,321
Oppenheimer	91,834
Strathcona	120,617
Thornton Park	10,338
Victory Square	21,251

4.4 Inflow and Tourism

Every commercial district in the City of Vancouver has a different profile of customers, from very local to tourist based. For example, Robeson Street has a very high proportion of spending coming from tourists, while Commercial Drive is a local-serving district. Other commercial areas in other parts of the world depend entirely on tourist trade, but in Vancouver, no area is more highly dependant on tourists than it is on locals. The most tourist-dependant commercial area in Vancouver is Robson Street, where roughly 35 percent of spending is from people who are not residents of the Lower Mainland. This extreme example illustrates that in Vancouver, a commercial area survives on local traffic first and foremost, and can be augmented by tourist trade.

The inflow factor that is included in the retail spending models above assumes that there is a net inflow of 10 percent into the DTES areas. This allows for outflow of spending on goods from stores near a person's workplace or on the commute, while also recognizing that there are many residential clusters surrounding the DTES which provide local market support that is not included in the DTES population. For example, the residential neighbourhoods at City Gate, International Village, Yaletown, and the anticipated population in Southeast False Creek are not factored into the demand models. While these areas have commercial opportunities in or near them, they also provide market support for DTES commercial businesses. International Village and City Gate in particular, are close enough that shoppers could use Chinatown and Victory Square shops for convenience purchases. However, those residents can and will travel to Broadway, Downtown, or Cambie Street for shopping trips.

Population growth in these surrounding residential neighbourhoods will bring new customers to the DTES businesses. The thousands of residential units being planned for Southeast False Creek, the eventual development of the Terminal Avenue Flats, Continued City Gate expansion, new towers at International Village, revitalised Woodward's, and the ongoing small-



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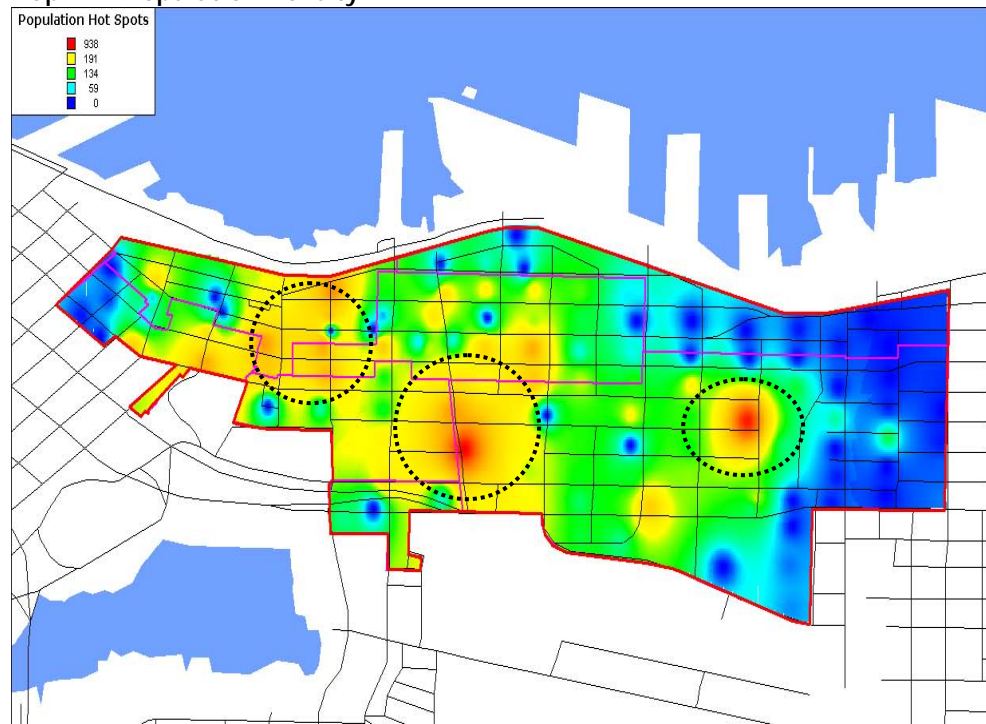
scale redevelopment projects in Gastown all bode well for retail and service commercial businesses in the DTES. In the future, retail spending modelling exercises could use a much broader trade area than simply the DTES or will need to include an inflow factor that is higher than the 10 percent used in this report for 2004 modelling.

4.5 Recommended Commercial Configuration

Optimal placement of future retail uses in the DTES involves determining locations that best serve the market. The DTES retail market is made up of both tourist and local spending. For this reason, both groups must be accounted for when choosing retail locations for future use.

The DTES local population would be best served by placing retail in close proximity to as large a portion of the population as possible. The following map shows population density across the DTES.

Map 12 - Population Density



Areas of dense population are shown in the circles above, while the areas surrounding them are slightly less dense. Retail should be placed in close proximity to these highly populated areas in order to efficiently serve the residents therein.

Tourism in the Downtown Eastside is concentrated almost exclusively in the Gastown and Chinatown sub-areas. These sub-areas are both historically relevant and in fairly close proximity to the CBD and Canada Place, with its cruise ship berths. In addition, new initiatives from the development industry and the planning department are seeing population growth contributing to these neighbourhoods' appeal as more complete



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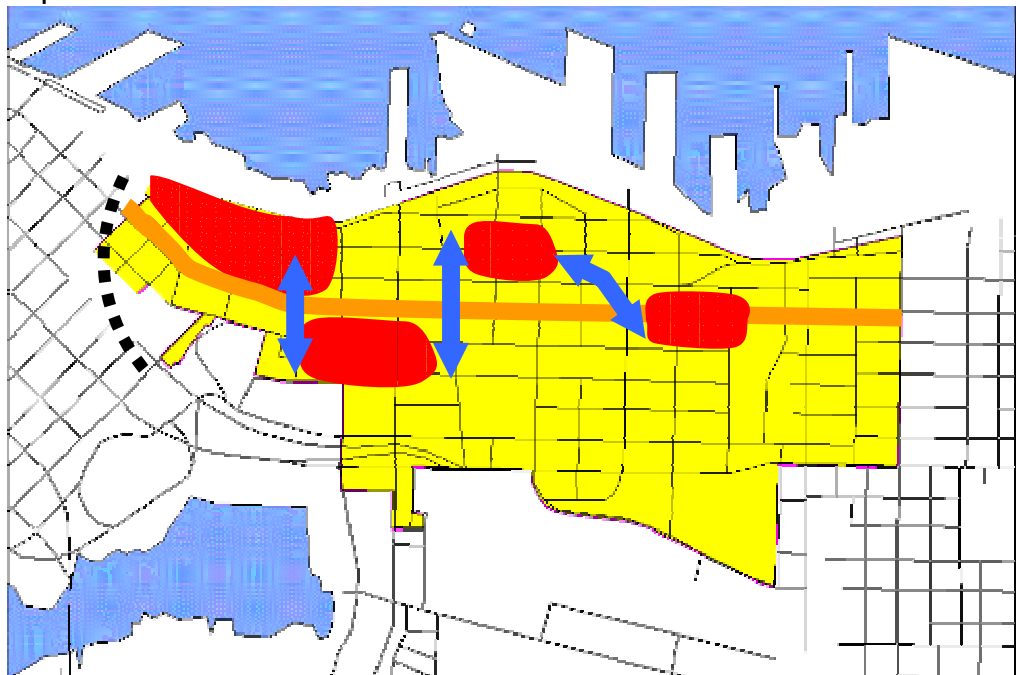
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communities. Thus, consideration of visitor and resident spending supports continued retailing in both Gastown and Chinatown.

Based on the above listed and other factors including street layout and currently existing buildings and infrastructure, our preliminary recommendations for the future allocation of retail uses across the DTES are illustrated in the following map. The commercial centres of Gastown, Chinatown, Oppenheimer, and Strathcona are linked by both Hastings Street, and potentially by north/south linkages such as the Carrall Street Greenway. Hastings Street is shown as the transportation and commercially important spine that runs through the entire area.

Map 13 - Commercial Network Recommendations



The recommended placements include retail nodes in the western end of the DTES, as well as two smaller placements to serve local populations centered on the intersections of Powell and Dunlevy, and Hastings and Hawks.

The western commercial district includes the neighbourhoods of Chinatown, Gastown, and Victory Square in an area that could contain retail uses, connected via Hastings Street and the Carrall Street Greenway. While we recognize the current oversupply of retail and commercial space in this area, as demonstrated by the high vacancy level, it is also important to acknowledge the direction and intent of the DD and DEOD documents which specifically target Hastings and Abbott Streets for continuous retail uses at grade, as well as the importance of the new Carrall Street initiative. It is also an opportunity to use the western extent of Hastings Street as a gateway between the Downtown and the DTES. With population growth in the area, and with developments such as Woodward's as catalysts, it is possible to see Hastings redevelop into a thriving commercial strip once again.



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5.0 LIVE/WORK

5.1 Policy

In 1996 the City of Vancouver conducted a study titled *Live/Work And Work/Live: Vancouver Overview Including Strategic Directions*. The report describes 6 different types of live/work and work/live conditions, and whether they are currently permitted by zoning and development bylaw (ZDB), or by building bylaw (BB). The following table is from the City of Vancouver report.

Category	Types of Business	Permitted? ZDB or BB
Commercial Live/Work	office or service work with few or no impacts, no employees, no sales (examples: self-employed consultants, researchers, software developers, analysts, writers, accountants, secretarial services; personal services such as hair stylists, music teachers, tutors, doctors, therapists, child daycare; contract workers, teleworkers; office bases for off-site services such as building and landscape contractors, sales reps)	ZDB: "homecraft" permits any occupation without development permit in any dwelling provided no employees, sales or "objectionable impacts" BB: most office, retail and many service uses permitted in combination with residential (note: health regulations prohibit some, e.g., hair stylist, food preparation, pet grooming)
Commercial Work/Live	above activities, but where employees are involved, plus retail sales and repair or other services with frequent customer trade	ZDB: not currently permitted; Council resolution to investigate "general live/work" regulations for mixed-use, downtown, heritage zones BB: as above
Industrial Live/Work	goods production or servicing involving lower impacts and no employees (examples: some jewellers, garment making, small leather goods, some printing, computer or small good repair, some production and recording studios)	ZDB: permitted as "homecraft" in dwellings throughout the city, without development permit provided no employees, sales or "objectionable impacts" BB: if carried out under "homecraft", many are not likely seeking business licenses or renovation permits; if they did, some of the work activities would be permitted but many would not
Industrial Work/Live	goods production or servicing involving higher impacts, employees, and/or sales (examples: metal work, wood work, some printing, some production studios)	ZDB: not permitted currently BB: most would not be permitted currently



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Artist Live/Work	artists and craftspersons working in low impact media or processes (examples: many painters, graphics, photography and print artists; some potters, carvers; some musicians)	ZDB: "homecraft" in dwellings throughout the city, without development permit; provided no employees, sales or "objectionable" impacts; also permitted as "dwelling unit accessory to Artist Studio Class A" BB: in the case of "homecraft" no business license or renovation permit likely being sought; however, residential is permitted with "Artist Studio Class A"
Artist Work/Live	artists and craftspersons working in higher-impact media or processes (examples: using amplified music, onsite film processing, welding, woodworking, spray painting, fired ceramics, generally using toxic or hazardous products)	ZDB: permitted as "dwelling unit accessory to Artist Studio Class B" BB: residential permitted with "Artist Studio Class B"

Source: City of Vancouver: *Live/Work And Work/Live: Vancouver Overview Including Strategic Directions, 1996*

The study concludes that while there may not be demand for a large number of these types of dwelling/working units, there are opportunities within some mixed use zones to incorporate any or all six types of live work and work/live. The study concludes with strategic directions for each type of unit, and makes recommendations for monitoring and further research into the impacts on communities and the long-term use of the units as built.

5.2 Live/Work in the DTES

Within the last five years, live/work developments (for the remainder of this report, we will consider all of the classes above as "live/work" unless specified differently) on the DTES have gained considerable favour from the development community. Often viewed as a transitional use between commercial areas and residential areas, these developments also have the ability to attract residents who are not daunted by living in these neighbourhoods. Whereas the so-called mainstream public could be reticent about living in the DTES, and would limit the market potential of residential developments there, artists, jewellers, photographers, consultants, designers, and many other small businesses are willing to occupy attractive space in the neighbourhood. In many cases the prices are not significantly lower than in other neighbourhoods of the City.

A tentative development community is gradually making inroads with new projects in the DTES, but to date the main focus of these projects has been Gastown, where the marketability is still positive and absorption has been strong.



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Some of the projects currently under development or recently completed include:

- The Old Spaghetti Factory building, 55 Water Street
 - Rental live/work lofts with restaurant & retail at-grade
- The Old Spaghetti Factory building 2, 37 Water Street
- Koret Building, 55 East Cordova; 118 units for sale
- The Edge; 211 - 289 Alexander Street
- The Arc, 1701 Powell Street
- Railtown Studios, 321 Railway Street

Reliance Holdings, Worthington Properties (Koret Lofts), and Salient Developments are all actively developing or marketing live/work projects in the DTES.

5.3 Live/Work Recommendations

The opportunity to develop projects that incorporate living and working uses on the DTES cannot be overstated. Neighbourhoods that are currently plagued by drug addiction, social and health problems, and chronic low income have accompanying property crime problems that limit the opportunities for commercial activity. This vicious cycle is difficult to break, as has been the case in some of the DTES neighbourhoods.

As part of this commercial capacity report we were asked to investigate live/work developments and identify any opportunities for the DTES that coincide with retail districts or other commercial activity. We feel that certain types of live/work styles and uses could significantly benefit the DTES, assuming the demand exists to occupy them with both uses. The two primary benefits of these developments are that they can bring 24-hour presence to streets and neighbourhoods that lack activity around the clock; and they populate an area with a "transitional use". A transitional use is a buffer between one land use or activity and another, typically between residential and commercial.

In the following section we make recommendations on potential redistribution of retail and service commercial uses. Live/work could be strategically located at the buffers between the commercial areas and residential. Live/work units at grade should only be located to the fringe of commercial areas, and ideally not on major traffic streets. Live/work units at grade could be restricted to north-south streets, or a minimum of 100 metres from the end of a retail district to allow for commercial expansion, and so as not to limit the pedestrian flow along commercial streets.



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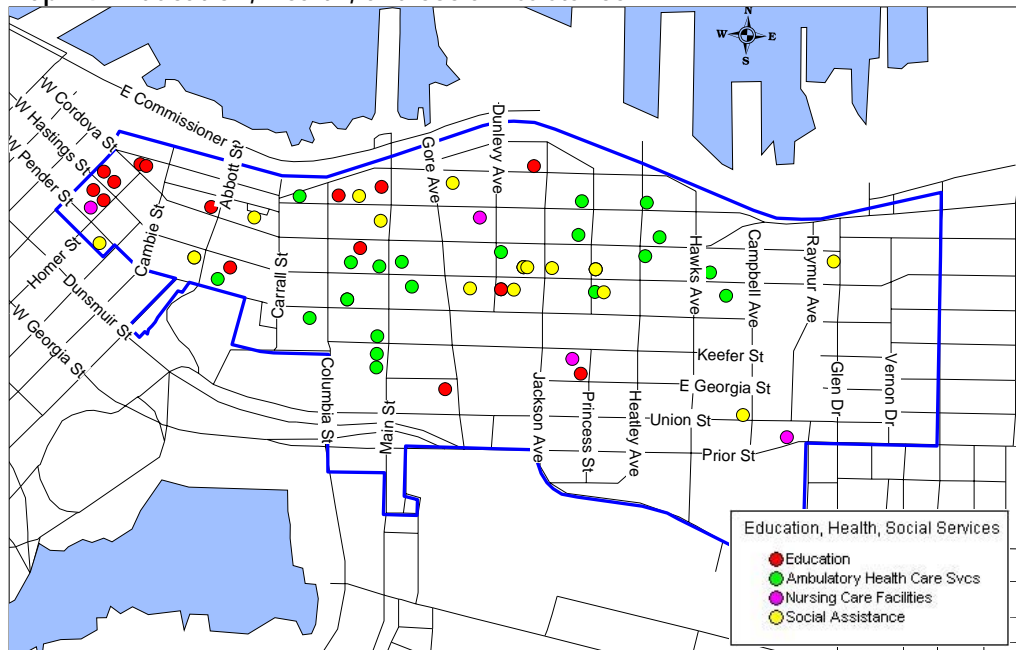


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6.0 HEALTH AND SOCIAL SERVICES

Health and social services are prominent on the ground-level streetfront landscape in the DTES. The often-studied social and health problems associated with the DTES attract people, services, funding, and agencies willing to help. The following map shows the distribution of education, health, and social services on the DTES, with colour-codes denoting the type of use.

Map 14 - Education, Health, and Social Assistance



This map shows an interesting pattern for the various education, health, and social assistance uses. Education uses shown in red are clustered in the western edge of Gastown and Victory Square sub-areas. These include language schools, computer skills schools, and schools of art and design. Other education uses also spread out across Gastown and into the other sub-areas, but tend towards the northern part of the DTES, in the non-residential districts.

The green dots represent the locations of Ambulatory health care services. These include all offices of physicians, dentists, physiotherapists, diagnostic laboratories, ambulance services, and so on. Their distribution, as shown on the map above, is in a strong east-west orientation, and with good representation on Hastings Street and Main Street.

Only a few nursing care facilities were identified in the inventory as being located in the DTES. Their distribution is not along any defined pattern, but two are located within the residential neighbourhoods of Strathcona.

Social services are shown in yellow, and are also aligned east to west across the DTES. These range from shelters and community food services to daycares and services for people with disabilities.



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The spread of the services on the above map would support the commercial recommendations in Map 10. The education uses, as transitional use between a downtown environment and a neighbourhood/commercial environment form a gateway at the western edge of the DTES. Other uses, particularly the ambulatory care services are aligned roughly in an east-west orientation, supporting the movement of people between the nodes, while also being convenient for residents.

If the new commercial layout in Map 10 is implemented, it is likely that there would be minor shifts in the distribution of these services. Education uses could, for example, cluster around the commercial nodes, while the health and social services could fill in street-front locations interstitially.



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7.0 DEMONSTRATION AREA VISION

This section integrates the results of the previously undertaken DTES retail model and inventory analysis in the presentation of an area vision for the future commercial configuration of the DTES.

The commercial space has been broken down into categories, including Gastown Retail, Chinatown Retail, Hastings Corridor Retail, Oppenheimer Retail, Strathcona Retail, Connective Retail and other DTES Retail space. These categorizations are described in greater detail in the coming pages.

The starting point for our recommended retail configuration is the realization that Vancouver's DTES is currently in possession of an inventory of retail floorspace that far exceeds current and even future demand. According to the Hudema retail model, current gross warranted retail floor area totals 342,000 square feet. Assuming that the DTES enjoys a successful revitalization over the next few years and population increases to 25,000 from its current 15,000 - 16,000. The average income in the DTES increases to 80% of the BC average. At this point, local demand for retail floorspace will still only total 675,000 square feet, far less than the current inventory of 2,050,000 square feet. Even allowing for a very vibrant tourism commercial industry in Gastown and Chinatown a reduction in space is necessary in order to render selected retail space more vital.

The process of identifying retail space that is important to the cohesiveness and overall future success of DTES neighbourhoods involves finding the retail space that is best located to serve DTES markets, that takes best advantage of existing space and buildings, and that aims to brand DTES sub-areas, as discussed in the Ference Weicker & Co report.

It has been determined that the retail stock of the DTES should be made up of three distinct sections:

- The Gastown / Chinatown visitor and neighbourhood retail areas, including those two sub-areas and the stretch of E Hastings Street that runs between them, and connections via Abbott and Carrall;
- The Oppenheimer retail area, on Powell Street between Jackson Street and Gore Ave; and,
- The Strathcona retail area, on Hastings Street between Campbell Ave and Princess Street.



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7.1 Gastown / Chinatown / Victory Square Commercial Area

This primary retail area for the Downtown Eastside should consist of the Gastown and Chinatown sub-areas and the transition areas between these two commercial destinations, including the Woodward's site on Hastings St.

There are a number of reasons that we believe retailing within Gastown and Chinatown should be maintained at current levels:

- Gastown and Chinatown attract a large volume of visitors, due in part to the retail-intensive, pedestrian-friendly nature of the areas;
- Gastown and Chinatown have been designated Historical Districts, largely due to their historical commercial uses;
- Gastown and Chinatown have a large stock of retail buildings, most of which have not deteriorated to the same extent as the building stock in other sub-areas of the DTES;
- Through the DD and DEOD, the City of Vancouver has expressed interest in a continuing resurgence in development in these areas as complete communities, including residential uses; and,
- Commercial uses within the two sub-areas have a demonstrated ability to be successful.

Considering the strong retailing at the current scale in Gastown and Chinatown, it is considered an important objective to link the two areas in order to facilitate the movement of tourists between the two areas. The creation of an interesting and safe way would involve the improvement of a stretch of Hastings St between Cambie St in the west and Main St in the east. The revitalization of this stretch will be challenging, but the reduction in the retail floor space inventory in surrounding areas (as presented later in our vision) makes it far more likely to succeed. The single most important factor in the Hastings St revitalization is the future redevelopment of the Woodward's site, which will provide a kick-start to the Hastings revitalization process, and could spur residential development. The Carrall Street Greenway initiative will contribute to a major connection between these areas.



We feel there is an opportunity to create a gateway commercial area that would link the CBD with the DTES. Residents of the downtown core are well-served by commercial uses, and facilitating a link between the CBD commercial and the Gastown / Chinatown retail areas would help the flow of people and commerce between the downtown and DTES, and could be channelled along Hastings Street. Dual commercial connections via Water Street in the north and Hastings Street could be the beginning of a historic/commercial circuit via Abbott/Carrall, and Chinatown.



7.2 Oppenheimer Commercial Area

This small retail area located along Powell St between Jackson and Gore could be designed to serve the local population in the Oppenheimer area. Convenience retail and services should be provided along this stretch, which is central to a relatively large population and adjacent to Oppenheimer Park, a gathering spot for residents of the community, and has historical significance as the old Japan Town site.

Gross demand for retail space in the Oppenheimer sub-area is for 92,000 square feet. Although it cannot be assumed that all of this demand will be satisfied in the area, the market capture of local businesses is assumed to be relatively high due to the low incomes and lower mobility of the area's residents.

The future Oppenheimer retail node should be made up of roughly 50,000 square feet of commercial space, and include tenants such as a small grocer, a convenience store, a drug store, services, restaurants and bars. The Oppenheimer sub-area currently contains an inventory of 359,000 square feet of retail space. The Hudema vision means to consolidate the viable businesses found around this sub-area into a compact, pedestrian-friendly node, and should reduce vacancies. Again, added residential space can be expected to increase the market for DTES commercial, while decreasing the oversupply of the same.

7.3 Strathcona Commercial Area

The Strathcona Retail Area is intended to be a relatively large neighbourhood and community-serving commercial node that stretches along Hastings St for two blocks near the population center of Strathcona. The intent of identifying the location on Hastings Street at Hawkes were as follows:

- Establish separation from other existing and recommended commercial nodes to assist in creating a unique identity for the node;
- A Hastings Street site would utilize existing commercial zoning while not creating conflicts with other incompatible uses such as residential;
- Maintains the employment-generating industrial land uses to the north and reinforces the commercial strip as a transition between residential and industrial;
- Is located within a convenient walking distance for much of the Strathcona population, while having the least possible competitive effect on similar uses in Chinatown.

The Strathcona retail could include convenience retail and services; a larger version of the Oppenheimer commercial strip. In the fullness of time, it is expected that a supermarket will locate to this node, drawing

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customers from several blocks in all directions, and filling the void between Commercial Drive and International Village in this market segment.

Gross demand for commercial in the Strathcona sub-area is for 121,000 square feet. Although not all of this demand can be assumed to apply to the Strathcona area itself, and a conservative capture rate will still allow for commercial trade to flow to Chinatown and elsewhere, from Strathcona residents.

Due to the factors mentioned above, the Strathcona commercial strip could be comprised of roughly 100,000 square feet of floor space. This represents a significant drop in inventory from the 184,000 square feet currently found in the sub-area. As in the other retail areas described by our vision for the future of retailing in the DTES, the conversion of current retail space not included in future plans to residential space should both increase the market for the remaining retail space, and decrease the glut of this type of space that currently exists.

7.4 Total Recommended Commercial Space

In sum, the main recommendations for the future of commercial uses in Vancouver's Downtown Eastside involve the selective decrease of the inventory of commercial floor area.

- Gastown and Chinatown commercial should be left largely unchanged, but still allowed to adjust to market influences. These areas are relatively successful, and also represent cultural assets that should be respected.
- A commercial gateway along Hastings Street should be encouraged through market and non-market residential additions, and maintaining retail uses at-grade throughout the Victory Square sub-area.
- A smaller, neighbourhood-serving commercial area of roughly 50,000 square feet should be encouraged around the intersection of Dunlevy St and Powell St in the Oppenheimer sub-area.
- A mid-sized, neighbourhood and community serving commercial area of roughly 100,000 square feet should be encouraged along Hastings St between Heatley Ave and Campbell Ave.
- A commercial area serving the large population of Strathcona could involve a full-scale supermarket in the future.
- We recommend that ground floor uses such as commercial be encouraged to locate in the designated commercial nodes to promote the pedestrian activity levels in these areas.

The following table describes the allocation of total DTES commercial space as mentioned in the above paragraphs.

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Commercial Node / Area	Size	Purpose
Gastown / Chinatown / Victory Square	1,200,000	Tourist / Destination / Convenience
Oppenheimer	50,000	Convenience
Strathcona	100,000	Community / Convenience

Selective decreases in commercial inventory were applied across the DTES in order to achieve the above result.

The overall retail and service commercial inventory of the DTES could be reduced by 700,000 square feet, improving the productivity of the commercial nodes and inviting investment in commercial space. The main areas of space reduction in this scenario are the industrial area, which currently has 250,000 square feet of commercial uses, and Oppenheimer which has 380,000 square feet. Both of these areas have supply levels of commercial that far exceeds the demand, and neither is supported to a great degree by inflow trade. Collectively, these areas should be reduced by 570,000 square feet, leaving 60,000 square feet of local-serving, productive uses.

Strathcona could see its supply of commercial halved, and focused in a commercial node on Hastings Street. 100,000 square feet of commercial could serve this community's convenience needs while still encouraging spending to flow to Chinatown.

7.5 Conclusions

In the DTES there is a problem within the fabric of commercial land, buildings, and businesses. Vacancies are high, and the commercial building stock reflects a time when there was much more demand for retail and service uses in this community, and the way in which it was used was different. However, Council, the planning department, the development community, and City residents have all expressed their willingness to see the area grow into its potential. That vision, as we interpret, is for commercial uses that serve the existing and growing residential population, and are attractive and convenient to attract the important inflow trade from the rest of the city, the Region, and tourists.

In any strategy such as this, the most important goal is to retain existing business, followed by enhance existing business, and encourage new businesses. Existing businesses should be encouraged to remain in place - even if they fall outside of the recommended pattern for commercial uses.

The hope and goal of this strategy would be to create areas where retail and service businesses thrive, generate employment, serve consumers effectively, and contribute to the City's neighbourhood visions.



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8.0 RECOMMENDATIONS

It is apparent to anyone who lives, works, or travels through the DTES that vacancy of retail at ground level is high, and that pedestrian activity through many of the commercial areas in the DTES is inhibited by intermittent uses and blank storefronts. The population in the DTES is roughly 16,000 people, and our retail forecasting model shows that their total retail spending of \$90 million annually supports only 342,000 square feet of retail and service commercial uses. Compared to the current supply of 2.03 million square feet (including vacancies), there is far more supply in the DTES than is warranted by the resident base.

Gastown and Chinatown are special cases. The nature of the goods and services, and the amount of occupied retail and commercial space indicate that much of the spending in these areas is not from the local residents. In both sub-areas, tourists and outside visitors are responsible for supporting the commercial uses. As these areas are, for the most part, strong retailing districts, they should be left more or less as they are, to have mixes of uses above-grade, but primarily retail and service commercial at ground level.

Victory Square is a troubled area, with very high vacancy. Retail on Hastings Street in this sub-area has not been strong for decades, simply because there is no resident or on-site daytime market to support it. The strategy here must be a long-term one, which should encourage mixed-use developments, including market and non-market residential development and employment uses in order to create positive, productive commercial activity. **The Woodwards redevelopment will bring new uses and people to the area. However, employment-generating uses have only a marginal effect to support commercial. Residential units are what will ultimately create sustainable demand for retail and commercial uses.**

Strathcona is virtually un-served by convenience retail and commercial services, relative to its population. Commercial uses should be encouraged to cluster on East Hastings from Campbell to Heatley. Up to 100,000 square feet of productive commercial uses could locate here, including ideally a supermarket. This amount of space would allow for the bulk of spending to continue to flow to Chinatown and other areas, but would primarily serve local residents.

Oppenheimer's population is slightly lower than Strathcona's but its purchasing power is much less. Despite this, Oppenheimer is also oversupplied with commercial space, and steps should be taken to concentrate the viable uses into a two-block area on Powell Street between Gore and Jackson. The community could support 50,000 square feet of productive commercial space, still allowing for outflow to Chinatown.

The rest of the DTES should be transitioned to non-retail uses, with additional commercial uses located and approved sparingly as the market warrants. A combination of market and non-market housing developments should be encouraged throughout the non-industrial districts. Live/work

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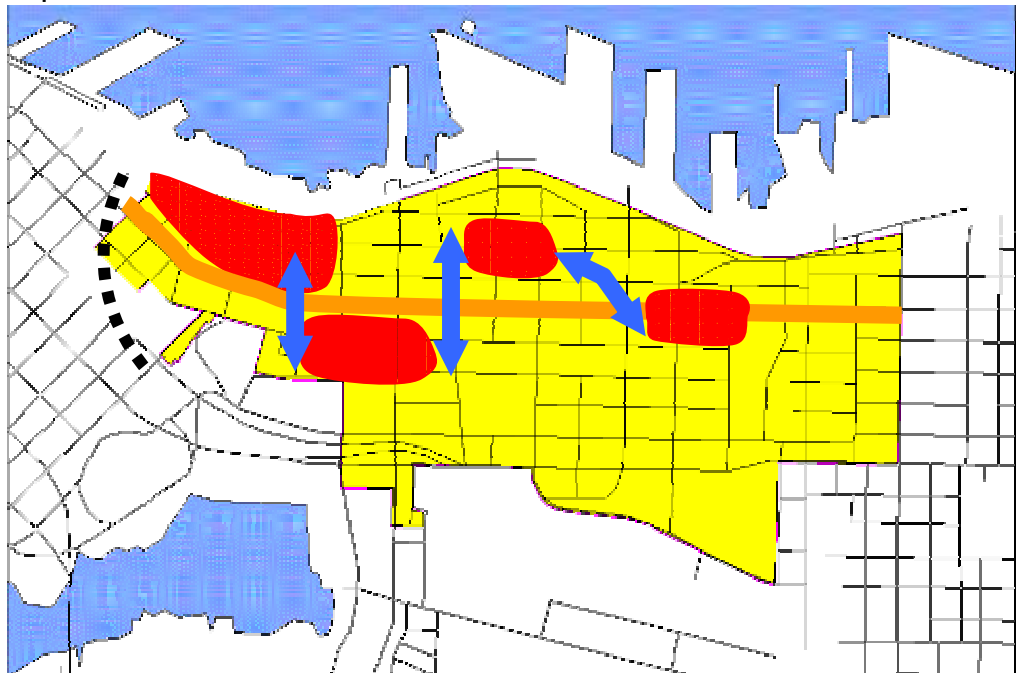
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space should be used as transitions between the residential and non-residential districts, including at-grade on secondary streets and north-south routes.

This vision is intended to serve the population as it is currently, but more efficiently, more effectively, and in a better way for the businesses. While residential growth would support stronger retail and commercial uses in the DTES, enhancing the commercial environment in the DTES does not require the addition of market housing. Non-market housing additions would provide added spending to the area and those residents would support businesses.

The key to this strategy, and the goal of the recommendations in this report is to reduce the supply of commercial space and to concentrate commercial uses in nodes that can become focus areas in the communities. These areas could then gain strength through higher sales, increased investment, and retention of spending in the community – not necessarily relying on market growth.

Map 15 - Commercial Network Recommendations



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Appendix I: Retail Expenditure Model for Sub-Areas

RETAIL EXPENDITURE POTENTIAL, 2004 Chinatown	
	2004
POPULATION	566
INCOME (PDI)	\$ 10,135
TOTAL INCOME POTENTIAL	\$5,736,210
RETAIL SALES / INCOME	51.5%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$3,249,990
FOOD AND CONVENIENCE	
Supermarkets	\$755,407
Other Food Stores	\$55,072
Drug Stores	\$186,471
Subtotal	\$996,950
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$354,206
Apparel and Accessories	\$167,876
Women's	\$47,466
Men's	\$11,444
Other Clothing	\$90,371
Shoes	\$18,595
Home Furnishings	\$219,557
Semi-Durables	\$97,349
Durables	\$95,834
Other Retail	\$161,698
Subtotal	\$1,096,520
AUTOMOTIVE	
Vehicles	\$741,576
Parts, Gas, & Service	\$414,945
Subtotal	\$1,156,521
TOTAL RETAIL	\$3,249,990

Source: Hudema Consulting Group Limited - June 2004

RETAIL EXPENDITURE POTENTIAL, 2004 Gastown	
	2004
POPULATION	2,634
INCOME (PDI)	\$ 20,698
TOTAL INCOME POTENTIAL	\$54,518,240
RETAIL SALES / INCOME	46.6%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$27,955,060
FOOD AND CONVENIENCE	
Supermarkets	\$6,497,693
Other Food Stores	\$473,704
Drug Stores	\$1,603,948
Subtotal	\$8,575,345
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$3,046,732
Apparel and Accessories	\$1,443,999
Women's	\$408,279
Men's	\$98,441
Other Clothing	\$777,330
Shoes	\$159,949
Home Furnishings	\$1,888,535
Semi-Durables	\$837,353
Durables	\$824,323
Other Retail	\$1,390,863
Subtotal	\$9,431,805
AUTOMOTIVE	
Vehicles	\$6,378,726
Parts, Gas, & Service	\$3,569,184
Subtotal	\$9,947,910
TOTAL RETAIL	\$27,955,060

Source: Hudema Consulting Group Limited - June 2004

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RETAIL EXPENDITURE POTENTIAL, 2004	
Industrial	
	2004
POPULATION	89
INCOME (PDI)	\$ 26,078
TOTAL INCOME POTENTIAL	\$2,320,980
RETAIL SALES / INCOME	44.1%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$1,126,500
FOOD AND CONVENIENCE	
Supermarkets	\$261,836
Other Food Stores	\$19,089
Drug Stores	\$64,634
Subtotal	\$345,559
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$122,774
Apparel and Accessories	\$58,189
Women's	\$16,452
Men's	\$3,967
Other Clothing	\$31,324
Shoes	\$6,445
Home Furnishings	\$76,102
Semi-Durables	\$33,743
Durables	\$33,218
Other Retail	\$56,047
Subtotal	\$380,072
AUTOMOTIVE	
Vehicles	\$257,042
Parts, Gas, & Service	\$143,827
Subtotal	\$400,869
TOTAL RETAIL	\$1,126,500

Source: Hudema Consulting Group Limited - June 2004

RETAIL EXPENDITURE POTENTIAL, 2004	
Oppenheimer	
	2004
POPULATION	5,125
INCOME (PDI)	\$ 10,792
TOTAL INCOME POTENTIAL	\$55,308,010
RETAIL SALES / INCOME	51.2%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$31,150,950
FOOD AND CONVENIENCE	
Supermarkets	\$7,240,524
Other Food Stores	\$527,859
Drug Stores	\$1,787,316
Subtotal	\$9,555,699
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$3,395,042
Apparel and Accessories	\$1,609,081
Women's	\$454,954
Men's	\$109,695
Other Clothing	\$866,197
Shoes	\$178,235
Home Furnishings	\$2,104,437
Semi-Durables	\$933,082
Durables	\$918,561
Other Retail	\$1,549,870
Subtotal	\$10,510,072
AUTOMOTIVE	
Vehicles	\$7,107,958
Parts, Gas, & Service	\$3,977,221
Subtotal	\$11,085,179
TOTAL RETAIL	\$31,150,950

Source: Hudema Consulting Group Limited - June 2004

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RETAIL EXPENDITURE POTENTIAL, 2004 Strathcona	
	2004
POPULATION	5,939
INCOME (PDI)	\$ 12,414
TOTAL INCOME POTENTIAL	\$73,724,850
RETAIL SALES / INCOME	50.5%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$40,914,700
FOOD AND CONVENIENCE	
Supermarkets	\$9,509,947
Other Food Stores	\$693,307
Drug Stores	\$2,347,520
Subtotal	\$12,550,774
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$4,459,162
Apparel and Accessories	\$2,113,420
Women's	\$597,552
Men's	\$144,077
Other Clothing	\$1,137,692
Shoes	\$234,100
Home Furnishings	\$2,764,038
Semi-Durables	\$1,225,541
Durables	\$1,206,469
Other Retail	\$2,035,651
Subtotal	\$13,804,280
AUTOMOTIVE	
Vehicles	\$9,335,830
Parts, Gas, & Service	\$5,223,815
Subtotal	\$14,559,645
TOTAL RETAIL	\$40,914,700

Source: Hudema Consulting Group Limited - June 2004

RETAIL EXPENDITURE POTENTIAL, 2004 Thornton Park	
	2004
POPULATION	412
INCOME (PDI)	\$ 15,833
TOTAL INCOME POTENTIAL	\$6,523,370
RETAIL SALES / INCOME	48.9%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$3,506,600
FOOD AND CONVENIENCE	
Supermarkets	\$815,051
Other Food Stores	\$59,420
Drug Stores	\$201,195
Subtotal	\$1,075,666
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$382,173
Apparel and Accessories	\$181,131
Women's	\$51,213
Men's	\$12,348
Other Clothing	\$97,506
Shoes	\$20,064
Home Furnishings	\$236,892
Semi-Durables	\$105,035
Durables	\$103,401
Other Retail	\$174,466
Subtotal	\$1,183,098
AUTOMOTIVE	
Vehicles	\$800,129
Parts, Gas, & Service	\$447,708
Subtotal	\$1,247,836
TOTAL RETAIL	\$3,506,600

Source: Hudema Consulting Group Limited - June 2004

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RETAIL EXPENDITURE POTENTIAL, 2004	
Victory Square	
	2004
POPULATION	1,164
INCOME (PDI)	\$ 11,018
TOTAL INCOME POTENTIAL	\$12,825,240
RETAIL SALES / INCOME	51.1%
Inflow	10%
TOTAL RETAIL POTENTIAL	\$7,208,720
FOOD AND CONVENIENCE	
Supermarkets	\$1,675,548
Other Food Stores	\$122,153
Drug Stores	\$413,607
Subtotal	\$2,211,308
DEPARTMENT STORE TYPE MERCHANDISE	
General Merchandise	\$785,655
Apparel and Accessories	\$372,361
Women's	\$105,282
Men's	\$25,385
Other Clothing	\$200,449
Shoes	\$41,246
Home Furnishings	\$486,993
Semi-Durables	\$215,927
Durables	\$212,567
Other Retail	\$358,659
Subtotal	\$2,432,162
AUTOMOTIVE	
Vehicles	\$1,644,870
Parts, Gas, & Service	\$920,379
Subtotal	\$2,565,249
TOTAL RETAIL	\$7,208,720

Source: Hudema Consulting Group Limited - June 2004

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Appendix II: Warranted Floor Area Model for Sub-Areas

GROSS WARRANTED RETAIL FLOOR AREA, 2004 Chinatown			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	1,373
Other Food Stores	\$350	100%	157
Drug Stores	\$500	100%	373
Subtotal			1,904
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	1,417
Apparel and Accessories			
Women's	\$350	100%	136
Men's	\$375	100%	31
Other Clothing	\$350	100%	258
Shoes	\$400	100%	46
Home Furnishings	\$285	100%	770
Semi-Durables	\$350	100%	278
Durables	\$375	100%	256
Other Retail	\$350	100%	462
Subtotal			3,654
Auto Parts	\$500	100%	830
TOTAL RETAIL	\$0		6,387
Service Commercial			3,194
TOTAL COMMERCIAL			9,581

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Chinatown			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	687
Other Food Stores	\$350	50%	79
Drug Stores	\$500	50%	186
Subtotal		50%	952
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	708
Apparel and Accessories			
Women's	\$350	50%	68
Men's	\$375	50%	15
Other Clothing	\$350	50%	129
Shoes	\$400	50%	23
Home Furnishings	\$285	50%	385
Semi-Durables	\$350	50%	139
Durables	\$375	50%	128
Other Retail	\$350	50%	231
Subtotal		50%	1,827
Auto Parts	\$0	50%	415
TOTAL RETAIL			3,194
Service Commercial		50%	1,597
TOTAL COMMERCIAL			4,791

Source: Hudema Consulting Group Limited - July 2004

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GROSS WARRANTED RETAIL FLOOR AREA, 2004 Gastown			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	11,814
Other Food Stores	\$350	100%	1,353
Drug Stores	\$500	100%	3,208
Subtotal			16,375
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	12,187
Apparel and Accessories			
Women's	\$350	100%	1,167
Men's	\$375	100%	263
Other Clothing	\$350	100%	2,221
Shoes	\$400	100%	400
Home Furnishings	\$285	100%	6,626
Semi-Durables	\$350	100%	2,392
Durables	\$375	100%	2,198
Other Retail	\$350	100%	3,974
Subtotal			31,428
Auto Parts	\$500	100%	7,138
TOTAL RETAIL	\$0		54,941
Service Commercial			27,471
TOTAL COMMERCIAL			82,412

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Gastown			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	5,907
Other Food Stores	\$350	50%	677
Drug Stores	\$500	50%	1,604
Subtotal		50%	8,188
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	6,093
Apparel and Accessories			
Women's	\$350	50%	583
Men's	\$375	50%	131
Other Clothing	\$350	50%	1,110
Shoes	\$400	50%	200
Home Furnishings	\$285	50%	3,313
Semi-Durables	\$350	50%	1,196
Durables	\$375	50%	1,099
Other Retail	\$350	50%	1,987
Subtotal		50%	15,714
Auto Parts	\$0	50%	3,569
TOTAL RETAIL			27,471
Service Commercial		50%	13,735
TOTAL COMMERCIAL			41,206

Source: Hudema Consulting Group Limited - July 2004

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GROSS WARRANTED RETAIL FLOOR AREA, 2004			
Industrial			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	476
Other Food Stores	\$350	100%	55
Drug Stores	\$500	100%	129
Subtotal			660
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	491
Apparel and Accessories			
Women's	\$350	100%	47
Men's	\$375	100%	11
Other Clothing	\$350	100%	89
Shoes	\$400	100%	16
Home Furnishings	\$285	100%	267
Semi-Durables	\$350	100%	96
Durables	\$375	100%	89
Other Retail	\$350	100%	160
Subtotal			1,266
Auto Parts	\$500	100%	288
TOTAL RETAIL	\$0		2,214
Service Commercial			1,107
TOTAL COMMERCIAL			3,321

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004			
Industrial			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	238
Other Food Stores	\$350	50%	27
Drug Stores	\$500	50%	65
Subtotal		50%	330
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	246
Apparel and Accessories			
Women's	\$350	50%	24
Men's	\$375	50%	5
Other Clothing	\$350	50%	45
Shoes	\$400	50%	8
Home Furnishings	\$285	50%	134
Semi-Durables	\$350	50%	48
Durables	\$375	50%	44
Other Retail	\$350	50%	80
Subtotal		50%	633
Auto Parts	\$0	50%	144
TOTAL RETAIL			1,107
Service Commercial		50%	553
TOTAL COMMERCIAL			1,660

Source: Hudema Consulting Group Limited - July 2004

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GROSS WARRANTED RETAIL FLOOR AREA, 2004 Oppenheimer			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	13,165
Other Food Stores	\$350	100%	1,508
Drug Stores	\$500	100%	3,575
Subtotal			18,247
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	13,580
Apparel and Accessories			
Women's	\$350	100%	1,300
Men's	\$375	100%	293
Other Clothing	\$350	100%	2,475
Shoes	\$400	100%	446
Home Furnishings	\$285	100%	7,384
Semi-Durables	\$350	100%	2,666
Durables	\$375	100%	2,449
Other Retail	\$350	100%	4,428
Subtotal			35,021
Auto Parts	\$500	100%	7,954
TOTAL RETAIL	\$0		61,222
Service Commercial			30,611
TOTAL COMMERCIAL			91,834

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Oppenheimer			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	6,582
Other Food Stores	\$350	50%	754
Drug Stores	\$500	50%	1,787
Subtotal		50%	9,124
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	6,790
Apparel and Accessories			
Women's	\$350	50%	650
Men's	\$375	50%	146
Other Clothing	\$350	50%	1,237
Shoes	\$400	50%	223
Home Furnishings	\$285	50%	3,692
Semi-Durables	\$350	50%	1,333
Durables	\$375	50%	1,225
Other Retail	\$350	50%	2,214
Subtotal		50%	17,510
Auto Parts	\$0	50%	3,977
TOTAL RETAIL			30,611
Service Commercial		50%	15,306
TOTAL COMMERCIAL			45,917

Source: Hudema Consulting Group Limited - July 2004

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GROSS WARRANTED RETAIL FLOOR AREA, 2004 Strathcona			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	17,291
Other Food Stores	\$350	100%	1,981
Drug Stores	\$500	100%	4,695
Subtotal			23,967
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	17,837
Apparel and Accessories			
Women's	\$350	100%	1,707
Men's	\$375	100%	384
Other Clothing	\$350	100%	3,251
Shoes	\$400	100%	585
Home Furnishings	\$285	100%	9,698
Semi-Durables	\$350	100%	3,502
Durables	\$375	100%	3,217
Other Retail	\$350	100%	5,816
Subtotal			45,997
Auto Parts	\$500	100%	10,448
TOTAL RETAIL	\$0		80,412
Service Commercial			40,206
TOTAL COMMERCIAL			120,617

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Strathcona			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	8,645
Other Food Stores	\$350	50%	990
Drug Stores	\$500	50%	2,348
Subtotal		50%	11,983
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	8,918
Apparel and Accessories			
Women's	\$350	50%	854
Men's	\$375	50%	192
Other Clothing	\$350	50%	1,625
Shoes	\$400	50%	293
Home Furnishings	\$285	50%	4,849
Semi-Durables	\$350	50%	1,751
Durables	\$375	50%	1,609
Other Retail	\$350	50%	2,908
Subtotal		50%	22,999
Auto Parts	\$0	50%	5,224
TOTAL RETAIL			40,206
Service Commercial		50%	20,103
TOTAL COMMERCIAL			60,309

Source: Hudema Consulting Group Limited - July 2004

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GROSS WARRANTED RETAIL FLOOR AREA, 2004 Thornton Park			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	1,482
Other Food Stores	\$350	100%	170
Drug Stores	\$500	100%	402
Subtotal			2,054
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	1,529
Apparel and Accessories			
Women's	\$350	100%	146
Men's	\$375	100%	33
Other Clothing	\$350	100%	279
Shoes	\$400	100%	50
Home Furnishings	\$285	100%	831
Semi-Durables	\$350	100%	300
Durables	\$375	100%	276
Other Retail	\$350	100%	498
Subtotal			3,942
Auto Parts	\$500	100%	895
TOTAL RETAIL	\$0		6,892
Service Commercial			3,446
TOTAL COMMERCIAL			10,338

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Thornton Park			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	741
Other Food Stores	\$350	50%	85
Drug Stores	\$500	50%	201
Subtotal		50%	1,027
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	764
Apparel and Accessories			
Women's	\$350	50%	73
Men's	\$375	50%	16
Other Clothing	\$350	50%	139
Shoes	\$400	50%	25
Home Furnishings	\$285	50%	416
Semi-Durables	\$350	50%	150
Durables	\$375	50%	138
Other Retail	\$350	50%	249
Subtotal		50%	1,971
Auto Parts	\$0	50%	448
TOTAL RETAIL			3,446
Service Commercial		50%	1,723
TOTAL COMMERCIAL			5,169

Source: Hudema Consulting Group Limited - July 2004

DOWNTOWN EASTSIDE RETAIL CAPACITY STUDY

May 2005



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GROSS WARRANTED RETAIL FLOOR AREA, 2004 Victory Square			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	100%	3,046
Other Food Stores	\$350	100%	349
Drug Stores	\$500	100%	827
Subtotal			4,223
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	100%	3,143
Apparel and Accessories			
Women's	\$350	100%	301
Men's	\$375	100%	68
Other Clothing	\$350	100%	573
Shoes	\$400	100%	103
Home Furnishings	\$285	100%	1,709
Semi-Durables	\$350	100%	617
Durables	\$375	100%	567
Other Retail	\$350	100%	1,025
Subtotal			8,104
Auto Parts	\$500	100%	1,841
TOTAL RETAIL	\$0		14,168
Service Commercial			7,084
TOTAL COMMERCIAL			21,251

Source: Hudema Consulting Group Limited - July 2004

NET WARRANTED RETAIL FLOOR AREA, 2004 Victory Square			
	Sales Reqm't (\$/Sq. Ft.)	Market Capture (%)	2004
FOOD AND CONVENIENCE			
Supermarkets	\$550	50%	1,523
Other Food Stores	\$350	50%	175
Drug Stores	\$500	50%	414
Subtotal		50%	2,111
DEPARTMENT STORE TYPE MERCHANDISE			
General Merchandise	\$250	50%	1,571
Apparel and Accessories			
Women's	\$350	50%	150
Men's	\$375	50%	34
Other Clothing	\$350	50%	286
Shoes	\$400	50%	52
Home Furnishings	\$285	50%	854
Semi-Durables	\$350	50%	308
Durables	\$375	50%	283
Other Retail	\$350	50%	512
Subtotal		50%	4,052
Auto Parts	\$0	50%	920
TOTAL RETAIL			7,084
Service Commercial		50%	3,542
TOTAL COMMERCIAL			10,626

Source: Hudema Consulting Group Limited - July 2004

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Appendix III: North American Industry Classification System (3-digit)

- 111 Crop Production
- 112 Animal Production
- 113 Forestry and Logging
- 114 Fishing, Hunting and Trapping
- 115 Support Activities for Agriculture and Forestry
- 211 Oil and Gas Extraction
- 212 Mining (except Oil and Gas)
- 213 Support Activities for Mining
- 221 Utilities
- 236 Construction of Buildings
- 237 Heavy and Civil Engineering Construction
- 238 Specialty Trade Contractors
- 311 Food Manufacturing
- 312 Beverage and Tobacco Product Manufacturing
- 313 Textile Mills
- 314 Textile Product Mills
- 315 Apparel Manufacturing
- 316 Leather and Allied Product Manufacturing
- 321 Wood Product Manufacturing
- 322 Paper Manufacturing
- 323 Printing and Related Support Activities
- 324 Petroleum and Coal Products Manufacturing
- 325 Chemical Manufacturing
- 326 Plastics and Rubber Products Manufacturing
- 327 Non-metallic Mineral Product Manufacturing
- 331 Primary Metal Manufacturing
- 332 Fabricated Metal Product Manufacturing
- 333 Machinery Manufacturing
- 334 Computer and Electronic Product Manufacturing
- Electrical Equipment, Appliance, and Component
- 335 Manufacturing
- 336 Transportation Equipment Manufacturing
- 337 Furniture and Related Product Manufacturing
- 339 Miscellaneous Manufacturing
- 423 Merchant Wholesalers, Durable Goods
- 424 Merchant Wholesalers, Nondurable Goods
- 425 Wholesale Electronic Markets and Agents and Brokers
- 441 Motor Vehicle and Parts Dealers
- 442 Furniture and Home Furnishings Stores
- 443 Electronics and Appliance Stores
- Building Material and Garden Equipment and Supplies
- 444 Dealers
- 445 Food and Beverage Stores
- 446 Health and Personal Care Stores
- 447 Gasoline Stations
- 448 Clothing and Clothing Accessories Stores
- 451 Sporting Goods, Hobby, Book, and Music Stores

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452	General Merchandise Stores
453	Miscellaneous Store Retailers
454	Nonstore Retailers
481	Air Transportation
482	Rail Transportation
483	Water Transportation
484	Truck Transportation
485	Transit and Ground Passenger Transportation
486	Pipeline Transportation
487	Scenic and Sightseeing Transportation
488	Support Activities for Transportation
491	Postal Service
492	Couriers and Messengers
493	Warehousing and Storage
511	Publishing Industries (except Internet)
512	Motion Picture and Sound Recording Industries
515	Broadcasting (except Internet)
516	Internet Publishing and Broadcasting
517	Telecommunications
	Internet Service Providers, Web Search Portals, and
518	Data Processing Services
519	Other Information Services
521	Monetary Authorities - Central Bank
522	Credit Intermediation and Related Activities
	Securities, Commodity Contracts, and Other
523	Financial Investments and Related Activities
524	Insurance Carriers and Related Activities
525	Funds, Trusts, and Other Financial Vehicles
531	Real Estate
532	Rental and Leasing Services
	Lessors of Nonfinancial Intangible Assets (except
533	Copyrighted Works)
541	Professional, Scientific, and Technical Services
551	Management of Companies and Enterprises
561	Administrative and Support Services
562	Waste Management and Remediation Services
611	Educational Services
621	Ambulatory Health Care Services
622	Hospitals
623	Nursing and Residential Care Facilities
624	Social Assistance
	Performing Arts, Spectator Sports, and Related
711	Industries
712	Museums, Historical Sites, and Similar Institutions
713	Amusement, Gambling, and Recreation Industries
721	Accommodation
722	Food Services and Drinking Places
811	Repair and Maintenance
812	Personal and Laundry Services
	Religious, Grantmaking, Civic, Professional, and
813	Similar Organizations
814	Private Households

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- Executive, Legislative, and Other General
- 921 Government Support
- 922 Justice, Public Order, and Safety Activities
- 923 Administration of Human Resource Programs
- 924 Administration of Environmental Quality Programs
Administration of Housing Programs, Urban Planning,
and Community Development
- 925
- 926 Administration of Economic Programs
- 927 Space Research and Technology
- 928 National Security and International Affairs
- 990 Vacant Lot*
- 998 Vacant Building Area*
- 999 Unknown or N/A*

*Hudema Consulting codes for DTES project



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