



Project Report

**Vancouver Chinatown Economic
Revitalization Action Plan**

Prepared for

City of Vancouver, Planning Department

Submitted by

AECOM Economics

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I. Introduction

The City of Vancouver has been working with the Chinese community on revitalization of Chinatown since 1999. Guided by the City Council's Chinatown Vision adopted in 2001, much has been accomplished; and the more recent investments include façade grants, neon lights, awning improvements, street and alley improvements, community murals, window display contests, and funding for heritage building renovation feasibility assessments. The more substantial City investments in Chinatown include the Chinatown Millennium Gate and the Chinatown Plaza Parkade.

In order to implement the Vision Direction, the City Council approved a three-year work program for the preparation of a Chinatown Community Plan. This plan was completed in 2009 and included a policy plan, updated zoning, design guidelines, tourism strategies and capital investment. The Historic Area Height Review (HAHR), intended to inform the heights and zoning densities policies that will form part of the Chinatown Community Plan, has met with some passionate discussion. The issues range from concern with gentrification resulting in displacement of lower income population to sufficient size of new projects to assure development feasibility essential for economic revitalization. The City Council adopted the new HAHR in the spring of 2011.

As part of the Historic Area Height Review and to accelerate the economic revitalization of Chinatown, the Vancouver City Council directed staff to prepare a Chinatown Economic Revitalization Action Plan (CERAP) on a priority basis. This Plan is to focus on actions that can be implemented within one or two years. The other objectives of this Plan include initiatives to support the work of existing business organizations in promoting Chinatown, to engage the community in Plan development and implementation, and to create a sense of excitement to better attract customers and investors. City staff retained an economic development planning team from San Francisco and Burnaby offices of AECOM to assist with this Chinatown Economic Revitalization Action Plan. William "Bill" Lee served as Project Director and Linda Cheu served as Project Manager.

II. Executive Summary

Growing Market for Chinatown

The regional economic setting for additional investment in Chinatown is clearly positive. The City of Vancouver has experienced relatively steady population and employment growth over the past decade. While the recession taking place in much of North America was noticeable, its impact on the Vancouver economy was relatively minor. The Metro Core area, Chinatown's primary market area, and Chinatown itself have both experienced residential population growth that is much faster than that of the Greater Vancouver region.

Overnight visitors to the Greater Vancouver region have grown from 7.97 million in 2003 to 8.42 million in 2010, and 39 percent of overnight visitors in 2007 cited cultural activities as part of their trip itinerary. A growing tourist market indicates business potential for Chinatown restaurants and shops that are able to cater to this market.

The immigration pattern from Asia to the Greater Vancouver region can be characterized by one of dispersal. First, in contrast to a hundred years ago when the Chinese immigrant population was concentrated in the vicinity of Chinatown and as recently as ten years ago when the concentration of new immigrants was in Richmond, the new settlement pattern is highly dispersed throughout the region. Second, while the initial Chinese immigrants were predominantly from Southern China through the port of Hong Kong, the new immigrants come from a much more varied geography throughout China and Asia. The business implications for Chinatown are twofold. First, Chinatown needs to broaden its restaurant offerings beyond largely Cantonese. Second, it needs to offer specialty restaurants and shops that appeal to niche Chinese or Asian markets in order to attract clientele from longer distances.

Key Findings From Community Consultation

A key objective of the CERAP was to engage the Chinatown community in the development of the Plan, including conducting and facilitating a series of in-depth interviews and workshops with stakeholder groups. The community's participation in plan development enhances the likelihood of successful implementation. The Communication and Consultation Strategy had several components, including small group and individual interviews, a door-to-door survey of 77 street front businesses, a large public workshop attended by over 240, and an online public forum. Input and findings from this consultation are detailed in Section IV, and the key points are summarized below:

- Old line retailers and restaurateurs are not keeping up with changing times (newer establishments have done quite well).
- Chinatown needs to modernize and broaden its product offerings.

- Need life on the streets at night and on the weekends, social problems would be diluted by more people on the streets
- Chinatown revitalization strategy must lead with the restaurant sector.
- Definitely need more and better restaurants - that's the heart of Chinatown
- Needs to be clean and safe.
- Family or Benevolent Associations are not suited to be real estate developers or undertake major renovation.
- Major constraint to renovation of historic buildings is the SRO units of approximately 100 square feet located on the upper floors of many of these buildings. The consolidation and reduction of these units to contemporary standards is not permitted by City policy.
- Cater to day-to-day needs of residents and near-residents: organic/fresh grocery stores and restaurants.
- Modernize the cultural center and museum to be an attraction while preserving its neighbourhood-serving aspects.
- Preserve the historical buildings that define Chinatown's streetscape.
- Involve younger community members in decision-making roles to pass leadership to the next generation.
- Encourage business owners to greet customers with a friendly, welcoming attitude to draw in casual visitors and tourists.

Opportunities for Chinatown Revitalization

The opportunities for accelerated investment in Chinatown are clearly present, and the key reasons are highlighted below:

- There is an expanding local market opportunity from the growth of Downtown Vancouver and the renovation of nearby neighbourhoods like Gastown. Chinatown is in the path of Downtown Vancouver revitalization and expansion.
- The Asian population in the Greater Vancouver region has been increasing in both absolute numbers and as a percentage of the total. The growing Chinese and Asian Canadian population represents an expanding regional market opportunity.
- The approximately 20 heritage buildings, if renovated, represent an unparalleled historic asset for not only Chinatown but also for the City of Vancouver and for Western Canada.

This asset will translate into greater appeal and more frequent visitation by tourists and residents of the region resulting in more spending locally.

- As demonstrated by recent successes, there is opportunity to broaden the restaurant offerings in Chinatown beyond Cantonese to the cuisine of many of China's different provinces and that of different Asian countries.
- The finer grain street pattern and pedestrian scale of this historic district, particularly if accented by renovated heritage buildings with contemporary tenants, provide a competitive advantage over suburban districts that have little pedestrian appeal.
- When compared to its main competition - Richmond, Chinatown is better located to serve the market area north of Vancouver, such as the communities of North Vancouver and West Vancouver.
- There is opportunity to improve the physical appearance, cleanliness and quality of programs of the Chinese Cultural Center so this important organization is able to convey a strong sense of cultural pride to the greater Chinese Canadian community in Western Canada.

The action strategies recommended below flow from the investigation.

Action Plan Strategies Recommendation – Near Term

Recruit youth volunteers for Chinatown Clean-Up Parties. The general lack of cleanliness, maintenance and visual appeal of Chinatown's physical environment affects the business climate and appeal of Chinatown as a destination for locals and tourists. AECOM recommends that the BIA organize semi-annual Chinatown Clean-Up Parties every Spring and Fall. The organization effort would include provision of publicity, food, drinks and live music to induce youth participation. To insure success, the food should be of high quality and the music should be no less than terrific.

Renovate of one more alley. The most important alley that still needs to be renovated is the alley that leads from the City built Chinatown Plaza Parkade to Pender Street. It is parallel to and one property west of Main Street. Since the Parkade is the major parking resource for those visiting Chinatown, this alley represents the main entrance to Chinatown for those parking in the Parkade. The actual implementation program would parallel that used for the renovation of Shanghai and Canton Alleys which have been successful.

Broaden the restaurant offerings of Chinatown. With Vancouver residents becoming ever more sophisticated in their taste for different and unique foods and the Chinese immigrant population coming from many more varied parts of China, the overarching strategy is to broaden the restaurant offerings in Chinatown from almost exclusively Cantonese to Asian dominated by Chinese

representing many different parts of China and to transform Chinatown into one of Vancouver's foremost dining destinations. With restaurants serving as the anchor use, other specialty shops will follow once vibrancy is achieved. It would be the BIA's responsibility to identify up to ten street level retail spaces that could be successful restaurant locations. Some of these spaces would no doubt be in the heritage building that will likely be renovated over the next two or three years. These would be promoted as restaurant opportunity spaces with the BIA recruiting noteworthy candidates.

With the new restaurants in place to enhance the vitality of Chinatown especially during the evenings and weekends, retail shops will follow. The shops that would best be able to take advantage of the renewed vitality of Chinatown are gift shops, boutique apparel, high design furnishing, art galleries, and specialty food shops. Some of these shops will reflect an Asian sensibility and others will reflect contemporary Vancouver.

Tenant Retention. Some of the businesses in Chinatown lack the skills involved in running a successful small business able to appeal to multiple market segment and to respond to changing consumer preferences. Yet these businesses play an important social role by serving a segment of the local population that has limited options due to language and income. AECOM recommends that the Chinatown Merchants' Association take a leadership role in the following:

- Encourage these businesses to improve their window displays possibly in partnership with a local design school.
- Provide customer service training for selected key businesses.
- Encourage bilingual signage.
- Encourage a group of businesses to remain open one more evening a week.

Action Plan Strategies Recommendation – Intermediate Term

Create an economic development corporation to specifically address the renovation of the heritage buildings in Chinatown. According to the Vancouver Heritage Foundation, Chinatown has 19 heritage buildings. These buildings define the physical character of Chinatown and provide a "sense of place" that cannot be replicated by other parts of Vancouver. The central challenge to the revitalization of these buildings is the fact that 16 or 17 of the buildings are owned by benevolent or family associations. While the more affluent societies have rental income and cash reserves, the amount of committable cash reserve typically falls well short of the cost of renovation.

Being board-based membership organizations accustomed to making decisions on a consensus basis, these societies are not well suited to take decisive action that involve financial risk. These organizations will not place their buildings at risk through a mortgage nor are they interested in selling

the buildings. The upper floors of some of these buildings are leased to hotel operators that operate single room occupancy hotels (SROs). The renovation of these buildings will reduce the number of SRO units offered because the structural reinforcing will take space and contemporary standards require the units be larger than hotel rooms of one hundred years ago. However, the reduction in the number of SRO units is prohibited by City ordinance which effectively stifles the renovation of the SRO portions of these buildings. The rents that can be charged for the ground floor retail spaces and the market orientation of the retail tenants will be influenced by the residents living upstairs.

The key to success is the creation of an organization that has the following objectives and capabilities. No such organization currently exists in Chinatown.

- Has as its central objective the restoration and adaptive reuse of the heritage buildings in Chinatown.
- Has a Board of Directors that is well respected not only in Chinatown but throughout the Vancouver community.
- Has strong staff capability in real estate development, adaptive reuse and social housing.
- Operates as a non-profit development corporation that acts for the benefit of the community in contrast to a for profit development entity requiring 20 to 30 percent return on each development project.
- Has the ability to take the development risk off the heritage buildings without gaining permanent ownership of these buildings.
- Has the ability to administer a revolving loan fund that is able to use the income earned from earlier project to fund later projects.
- Has a parallel charitable foundation that is both a grantee and a grantor with staff skilled in fundraising and government programs designed to encourage the renovation of heritage buildings.

Successful implementation of this strategy will require both strong leadership and significant front end funding. The recommended key steps and responsibilities are as follows:

- City of Vancouver sponsors the creation of a pair of new organizations: 1) Chinatown Heritage Building Renovation Corporation (HBRC), and 2) Chinatown Heritage Building Foundation (CHBF).
- City and Chinatown leadership forms a committee to nominate a Board of Directors for both organizations with the ability and interest to provide seed monies.

- Initial seed money of one million dollars is required for three to four years of HBRC and CHBF operation – rent, utilities, staff salaries and contract services. The Board Members of these two organizations would have responsibility for fund raising with the City committing to provide a dollar match for each dollar raised up to \$500,000.
- Initial seed money of at least two million dollars is required for the establishment of a revolving loan fund available to renovate these heritage buildings. The Board Members will be responsible for the initial fund raising from private donations with City committing to provide a dollar for dollar match up to one million dollars.
- The community has 12 months from creation of these organizations to raise the \$1.5 million of required the seed money after which the City's matching obligations terminates. The City's commitment is contingent upon the leadership in the Chinese-Canadian community stepping forward with funding.

Without a strong partnership between the City of Vancouver and the Chinese Canadian community in Western Canada, success is unlikely. With the correct organizational structure and inspired leadership from the Chinese Canadian community, the potential for success is considerable. The City of Vancouver can act as a partner to bring resources to bear possibly from senior levels of government.

Reinvigorate the Chinese Cultural Center. The key to any strong not for profit organization is an active and vibrant board of directors who can bring financial, technical, human, and other resources to the organization. The Chinese Cultural Centre Board currently operates as a “representative” style board focused on oversight. The Board appears to lack meaningful term limits. In order for this organization to be vibrant into the future, the Board needs to transition from one primarily concerned with representation and oversight to membership based upon a wide variety of skills and the ability to bring resources to the organization. A proactive Board could raise funds and develop a strategy for the organization that would position it for long term success.

The Board should include not less than 15 but no more than 21 members, with membership spanning a maximum of two consecutive three-year terms. There should be a requirement for a minimum financial contribution and/or service hours to the organization, and there should be a mix of individuals from within and outside of Chinatown. The focus of Board recruitment efforts should be on resources and skills rather than on representation; and the Board should include people with access to financial resources, professionals with specific skill sets (i.e. finance, accounting, legal, real estate, tourism, education, etc.), and people with relationships to other organizations who could be strong financial partners for the Chinese Culture Centre.

Ultimately, the goal for the organization should be to be the development of a robust array of programming that is relevant to existing resident and tourist market segments. Specific tasks and priorities should include the following:

- Hiring of an Executive Director with the leadership ability and skills required to transition the organization to a more active and viable one.
- Developing a basic annual maintenance plan and longer term maintenance plan for the facility, including addressing deferred maintenance issues as soon as possible.
- Establishing a broader mix of funding sources for the Chinese Cultural Centre, including a mix of earned and contributed income, where contributed income comes from individuals, foundations, corporations, and other entities.
- Creating one or two “signature” programs that are relevant to existing target market segments and bring resident and tourist visitors to Chinatown on a regular basis.
- Developing a state of the art permanent exhibit incorporating the latest in exhibit design and exhibit technologies that teaches people about the history of Chinese in Vancouver / Canada and Vancouver Chinatown.
- Partnering with other not for profit institutions (i.e. the Sun Yat Sun Gardens), private corporations, foundations, the City, and other community groups to develop an active calendar of events, programs, and activities.
- Developing a marketing and public relations plan that works closely with other organizations to attract people to Chinese Culture Centre programs.

Finally, once a new Board of directors is in place, they may eventually want to consider redevelopment that might provide better usage of the Cultural Center site, while still being sensitive of adjacent uses. This site, owned by the City of Vancouver, is of sufficient size that it can be redeveloped in a manner that satisfies multiple objectives: cultural, social, financial and symbolic.

Marketing. Once a number of the recommended program elements are in place, ongoing marketing will be important to sustain success. The BIA has the primary marketing responsibility, and AECOM recommends the following for each market segment:

- Primary Market – Bring back and expand shopping tours in Chinatown to highlight the new and unique stores and restaurants.
- Secondary Market - Emphasize the new restaurants and new programs at the Cultural Center.

- Tertiary Market – Highlight shops and restaurants that serve niche markets and direct most of the marketing dollars to the north (North and West Vancouver).
- Tourist Market – Invite the hotel concierges to experience the new programs at the Cultural Center and the new and unique restaurants in Chinatown.

III. Changing Economic Profile of Chinatown's Market Place

In order to understand the economic and demographic forces influencing business activity in Chinatown, AECOM reviewed the economic growth of the Vancouver region and examined the immigration patterns to this region. Where data was available, the analysis focused on the Metro Core and Chinatown Primary Market Area, defined as a two kilometre drive area from the intersection of Pender Street and Columbia Street in the heart of Chinatown.

Figure III-1: Map of Chinatown Primary Market Area



Figure III-2: Map of City of Vancouver and Surrounding Cities



Regional Demographic and Economic Trends

Population Growth

From 2001 to 2006, the Greater Vancouver region gained 129,600 new residents for a total population of 2.12 million, an annual increase of 1.3 percent. Approximately one quarter of this growth, or 32,400, occurred in the City of Vancouver. In 2006, the City accounted for 27 percent of the region's total population. Richmond was the second fastest growing city in the area, followed by Burnaby, North Vancouver (City and District) and West Vancouver. Together, these four cities that surround Vancouver accounted for another 16 percent of the regional growth. Within the City, the Metro Core and Chinatown Primary Market Areas grew at significantly faster rates. Over the five-year period, the Metro Core area grew from 87,300 to 104,800, an increase of 17,500 residents, or approximately 20 percent. The Chinatown Primary Market Area grew by 8,000 residents to 34,100, representing an increase of over 30 percent. On an annual basis, the population of the Metro Core grew at nearly three times, and Chinatown Primary Market Area at over 4 times the rate of the Greater Vancouver region overall. These growth rates are based on 2001 and 2006 Census data, presented below in **Table III-1**.

Table III-1: Population Growth, 2001 - 2006

Geographic Area	2001	2006	Abs		CAGR
			Growth	% Growth	
Chinatown Primary Market Area ¹	26,151	34,134	7,983	30.5%	5.5%
Vancouver Metro Core	87,265	104,750	17,485	20.0%	3.7%
Vancouver	545,671	578,041	32,370	5.9%	1.2%
Richmond	164,345	174,461	10,116	6.2%	1.2%
Burnaby	193,954	202,799	8,845	4.60%	0.9%
North Vancouver	44,303	45,165	862	1.90%	0.4%
West Vancouver	41,421	42,131	710	1.7%	0.3%
Greater Vancouver	1,986,965	2,116,581	129,616	6.5%	1.3%

¹ Defined as 2km drive area from Pender Street and Columbia Street.

Source: Statistics Canada, 2006 Census

According to BC Stats' estimates of population growth from 2006 through 2010 (**Table III-2**), the Greater Vancouver region has grown at a slightly faster rate than the previous five-year period. Greater Vancouver grew by approximately 175,500 residents to 2.37 million, an annual growth rate of 1.9 percent compared to 1.3 percent from 2001 through 2006. During this period, Burnaby and Richmond grew at a faster rate than Vancouver, however within the City of Vancouver, Downtown Eastside and City Centre neighbourhoods, which encompass Chinatown, continued to be the fastest growing in the region. This strong population growth in the Metro Core suggests solid demand for market rate housing in and around Chinatown.

Table III-2: Population Estimates, 2006 - 2010

Geographic Area ¹	2006	2010	Abs		CAGR
			Growth	% Growth	
Vancouver	612,632	651,276	38,644	6.3%	1.5%
<i>City Centre</i>	<i>110,980</i>	<i>121,541</i>	<i>10,561</i>	<i>9.5%</i>	<i>2.3%</i>
<i>Downtown Eastside</i>	<i>56,174</i>	<i>65,222</i>	<i>9,048</i>	<i>16.1%</i>	<i>3.8%</i>
<i>North East</i>	<i>100,273</i>	<i>105,844</i>	<i>5,571</i>	<i>5.6%</i>	<i>1.4%</i>
<i>West Side</i>	<i>129,011</i>	<i>134,729</i>	<i>5,718</i>	<i>4.4%</i>	<i>1.1%</i>
<i>Midtown</i>	<i>84,233</i>	<i>89,355</i>	<i>5,122</i>	<i>6.1%</i>	<i>1.5%</i>
<i>South Vancouver</i>	<i>131,961</i>	<i>134,585</i>	<i>2,624</i>	<i>2.0%</i>	<i>0.5%</i>
Richmond	182,652	196,217	13,565	7.4%	1.8%
Burnaby	210,507	227,599	17,092	8.1%	2.0%
North Vancouver	134,543	139,542	4,999	3.7%	0.9%
West Vancouver	50,457	51,863	1,406	2.8%	0.7%
Greater Vancouver	2,199,121	2,374,628	175,507	8.0%	1.9%

¹ Based on BC Stats, Local Health Area

Source: BC Stats, BC Ministry of Labour, Citizens' Services and Open Government, February 2011

Employment

Total Greater Vancouver employment was 1.22 million in 2010, up from 1.03 million in 2000. As in most metropolitan areas, the services-producing sectors provide the greatest proportion of jobs. In 2010, just over one million jobs, approximately 83 percent of total employment in Greater Vancouver, were in services-producing sectors. The region's economy is highly diversified with Trade accounting for approximately 16.5 percent of total jobs in 2010, followed closely by Health Care and Social Assistance and Professional, Scientific and Technical Services at 10.8 percent and 9.4 percent, respectively.

Overall employment growth averaged 2.3 percent per year from 2002 to 2007, when it reached a high of 3.5 percent. In 2008, employment growth slowed dramatically, and then turned negative in 2009 as the job market contracted by 0.3 percent. It has since recovered some, posting a 1.3 percent increase in 2010. The recovery was broadly based, with multiple industries within the services-producing sectors making significant gains. Unemployment, however, had risen to 7.5 percent in 2010, from a low of four percent in 2007.

Utilities and Construction have been the fastest growing industries over the last ten years. The construction industry experienced strong job growth from 2000 to 2008, during which employment increased by over 90 percent. While the construction industry has contracted since 2008, it still provided about 90,000 jobs in 2010, employing approximately seven percent of the total. Other

growing industries include Educational Services, Health Care and Social Assistance, Trade and Scientific and Technical Services. Greater Vancouver employment by industry from 2000 through 2010 is presented in **Table III-3**.

Since 1971, jobs within the Greater Vancouver region have gradually dispersed away from the urban core. While in 1971 Vancouver accounted for 57.1% of jobs within the region, this decreased over three decades to 31.2%, and as low as 29.8% in 2006. By contrast, the surrounding areas of Burnaby, North Vancouver, and West Vancouver have changed by little more than one percentage point over the same period. Richmond has logged a modest increase, from 6.1% to 9.7%. This is not due to a loss of jobs in Vancouver, since as noted the absolute number of jobs has increased over time. Instead it reflects that surrounding areas have attracted a larger percentage of jobs as those areas have become increasingly urbanized. The share of Greater Vancouver employment by city from 1971 through 2006 is presented in **Table III-4**.

Within the City of Vancouver, employment density is concentrated in the downtown peninsula as shown in **Figure III-3**. The area of highest employment density encompasses the entire Chinatown Primary Market Area.

Table III-3: Greater Vancouver Employment by Industry, 2000 - 2010

(thousands)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	CAGR 2000-2010
All Industries	1,032	1,037	1,063	1,091	1,105	1,127	1,150	1,190	1,207	1,204	1,220	1.7%
Annual % Change		0.5%	2.5%	2.6%	1.3%	2.0%	2.1%	3.5%	1.5%	-0.3%	1.3%	
Unemployment Rate	5.8	6.6	7.7	7.2	6.7	5.7	4.4	4.0	4.3	7.1	7.5	
Goods-Producing Sector	185	176	178	188	201	203	205	219	228	205	202	0.9%
Agriculture	10	7	9	9	11	12	10	9	10	8	7	-3.0%
Forestry, Fishing, Mining, Oil and Gas	6	6	4	7	4	6	8	8	4	6	7	0.8%
Utilities	5	6	5	6	5	6	4	5	7	7	9	6.6%
Construction	53	53	58	56	72	77	82	91	102	95	89	5.3%
Manufacturing	111	104	103	111	108	102	102	107	104	90	90	-2.1%
Services-Producing Sector	847	862	885	903	904	923	945	971	979	999	1,017	1.9%
Trade	157	166	172	182	167	178	185	187	183	195	201	2.5%
Transportation and Warehousing	73	67	67	68	66	70	66	74	70	65	68	-0.8%
Finance, Insurance, Real Estate	78	78	83	84	86	78	84	88	96	89	88	1.2%
Professional, Scientific and Tech Svcs	93	96	95	97	100	107	109	112	111	113	115	2.1%
Business, Bldg and Other Support Svcs	39	42	41	45	46	54	52	55	57	56	55	3.6%
Educational Services	68	71	76	75	77	86	89	88	95	96	96	3.5%
Health Care and Social Assistance	102	96	109	106	112	105	113	114	112	129	131	2.6%
Information, Culture and Recreation	65	66	68	67	67	69	69	76	72	71	69	0.5%
Accommodation and Food Services	77	86	81	81	85	85	84	87	85	85	86	1.0%
Other Services	53	52	50	48	49	49	52	48	55	52	57	0.9%
Public Administration	42	42	43	50	47	45	42	43	43	48	51	2.0%

Source: Statistics Canada, Labour Statistics Division, Labour Force Survey.

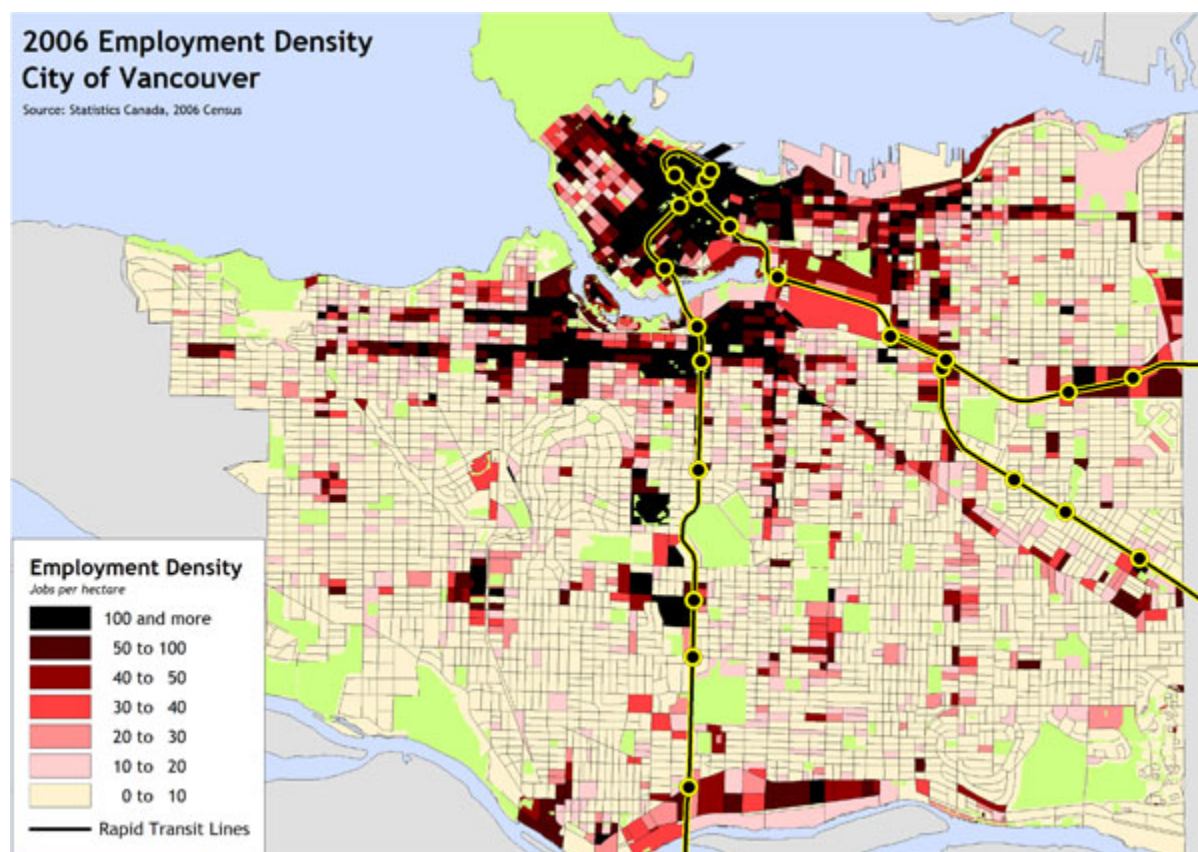
Table III-4: Share of Greater Vancouver Total Employment, 1971 - 2006

Geographic Area	1971	1981	1991	1996	2001	2006
Vancouver	57.1%	47.6%	41.2%	33.6%	31.2%	29.8%
Richmond	6.1%	8.8%	10.6%	9.8%	10.4%	9.7%
Burnaby	10.8%	11.0%	11.6%	10.6%	10.8%	10.3%
North Vancouver	5.3%	5.8%	5.5%	4.9%	4.5%	4.2%
West Vancouver	1.8%	2.0%	1.7%	1.6%	1.4%	1.5%
Total 5 Cities/Districts	81.1%	75.2%	70.6%	60.4%	58.3%	55.4%

¹ Includes both North Vancouver City and District

Source: Actual Employment Figures from Census Data, Statistics Canada.

Figure III-3: City of Vancouver Employment Density, 2006

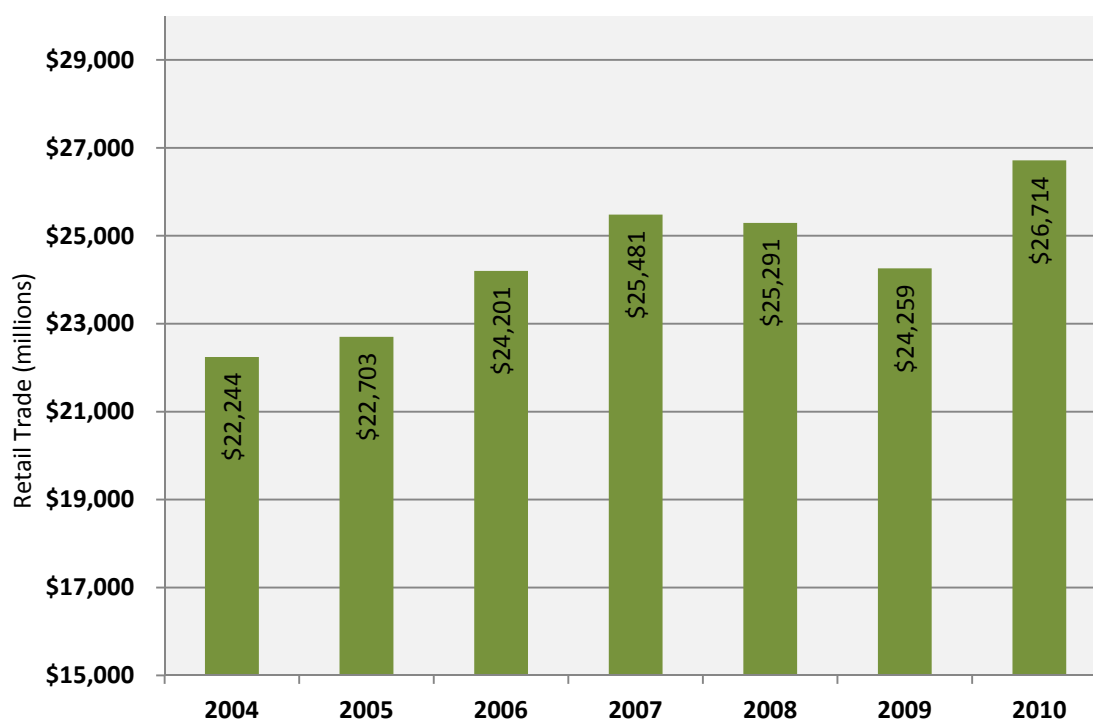


Source: Statistics Canada; AECOM

Retail Trade

Further evidence that the overall Greater Vancouver economy is recovering can be seen in retail trade trends presented in **Figure III-4**. Total annual retail sales grew almost 15 percent, from \$22.2 in 2004 to \$25.5 billion in 2007. After two consecutive years of declining sales, retail trade increased by over ten percent in 2010 to \$26.7 billion.

Figure III-4: Greater Vancouver Retail Trade, 2004 - 2010

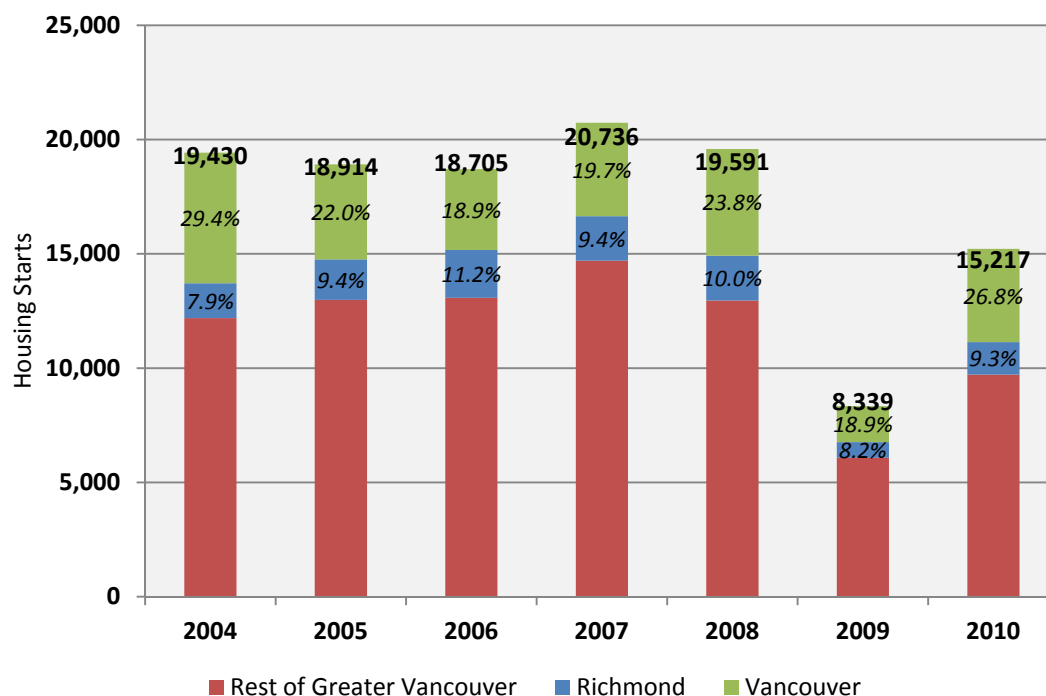


Source: Statistics Canada, Monthly Retail Trade Survey

Housing Starts

The pace of construction and home building has also shown signs of a strong recovery in 2010. Total housing starts in Greater Vancouver averaged approximately 19,500 per year between 2004 and 2008. During this period, 23 percent of Greater Vancouver's total housing starts were in Vancouver and ten percent were in Richmond. In 2009, the number of housing starts fell over 57 percent to just 8,300, before sharply rebounding in 2010 to 15,200. This increase in construction also had a disproportionate concentration within the City of Vancouver, which included 27 percent of the housing starts; above the average for the preceding six years.

Figure III-5: Greater Vancouver Housing Starts, 2004 – 2010



Source: Canada Mortgage and Housing Corporation (CMHC)

Summary of Economic Change

The regional economic framework for additional investment in Chinatown is clearly positive. The City of Vancouver has experienced relatively steady population and employment growth over the past decade. While the recession taking place in much of North America was noticeable, its impact on the Vancouver economy was relatively minor. The Metro Core area, Chinatown's primary market area, and Chinatown itself have both experienced residential population growth that is much faster than that of the Greater Vancouver region.

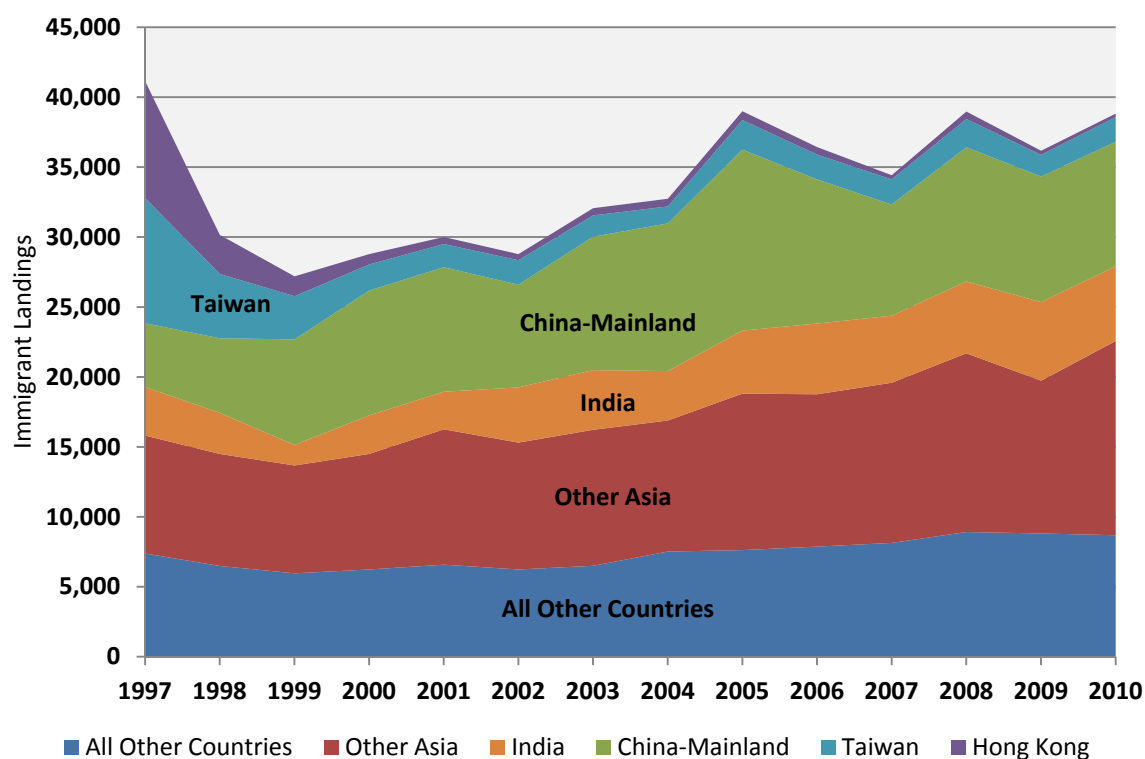
Immigrant Population Characteristics

Much of the population growth in the Greater Vancouver region is driven by immigration. Between 1997 and 2010, an average of 33,900 immigrants arrived in Greater Vancouver each year. During this period, immigrants from Asia have consistently accounted for 76 to 82 percent of total immigrants; however, the country of origin has shifted over time. In 1997 most Chinese immigrants from Asia came from either Taiwan or Hong Kong, at 22 percent and 20 percent of total immigrants, respectively. By 2010, the proportion of immigrants from Taiwan decreased to just one percent and from Hong Kong to five percent of total immigrants. During this period the proportion of immigrants from Mainland China increased from 11 percent in 1997 to a high of 33 percent in 2005. Just under

8,700 immigrants from Mainland China landed in Greater Vancouver in 2010, representing 23 percent of total immigrants. Greater Vancouver immigrant landings by place of origin from 1997 to 2010 are presented in **Figure III-6**.

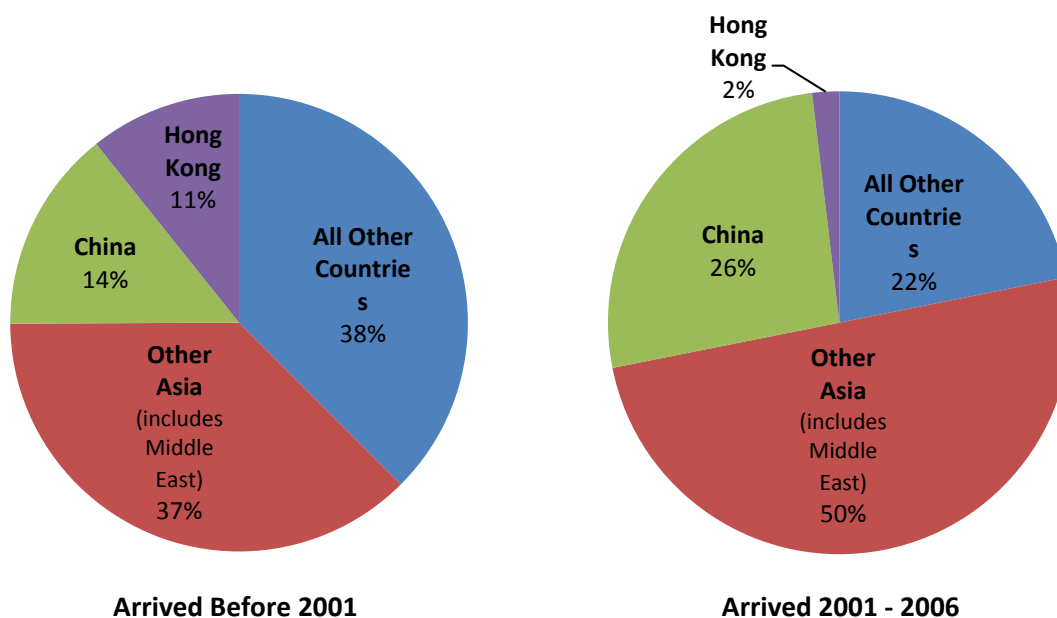
The increase in the proportion of immigrants from Mainland China since 2001 can also be seen in 2006 Census figures of immigrant population by place of birth (**Figure III-7**). Of the immigrant population that arrived before 2001, 14 percent were born in Mainland China. This increased to 26 percent for the immigrant population that arrived between 2001 and 2006. The immigrant population born in Hong Kong decreased over time, from 11 percent of those that arrived before 2001 to two percent of those that arrived between 2001 and 2006.

Figure III-6: Greater Vancouver Immigrant Landings, 1997 - 2010



Source: BC Stats, data provided by Citizenship and Immigration Canada

Figure III-7: Greater Vancouver 2006 Immigrant Population by Place of Birth



Source: Statistics Canada, 2006 Census

Total and immigrant populations are broken down by the Chinatown Primary Market Area, City of Vancouver, Greater Vancouver region, and the City of Richmond for comparison, below. The overall conclusion, according to the 2006 Census, is that the Chinatown Primary Market Area is not characterized by a particularly large first or second generation immigrant population. In fact, it has a smaller percentage of the population that speaks Chinese, compared to the city and region as a whole. The new immigrant population tends to be more Asian and comes from more varied parts of China and Asia.

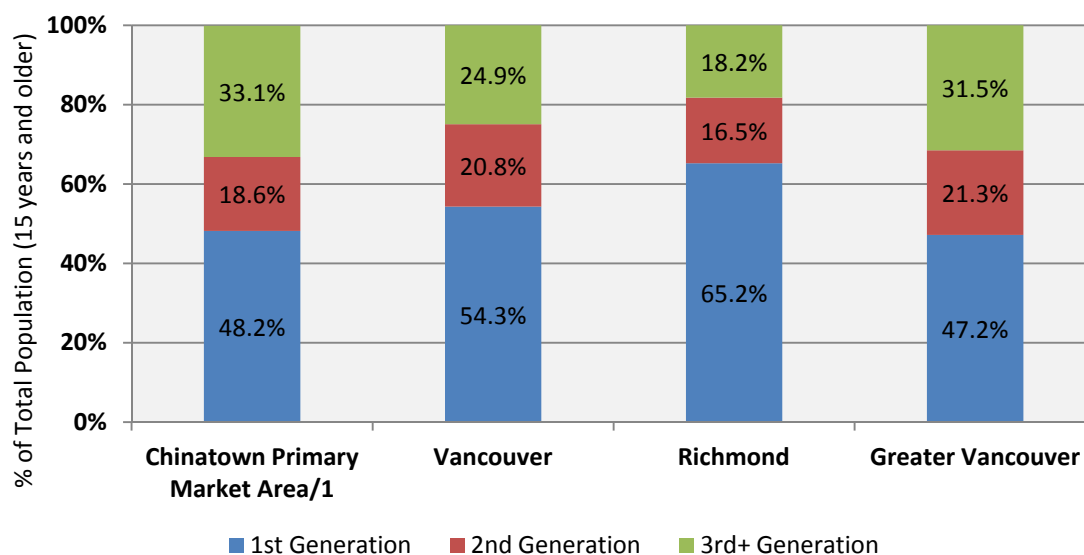
Table III-5: Immigrant Population Growth, 1986 - 2006

	Chinatown Primary Market Area¹			Vancouver			Richmond			Greater Vancouver		
	Total Pop	Imm Pop	% Imm	Total Pop	Imm Pop	% Imm	Total Pop	Imm Pop	% Imm	Total Pop	Imm Pop	% Imm
1986				431,145	166,930	39%	108,490	34,005	31%	1,310,175	380,240	29%
1991				471,844	191,830	41%	126,624	44,560	35%	1,602,590	476,525	30%
1996				514,008	228,230	44%	148,867	71,630	48%	1,831,665	633,740	35%
2001	26,151			545,671	247,635	45%	164,345	88,300	54%	1,986,965	738,550	37%
2006	34,134	13,511	40%	578,041	260,755	45%	174,461	99,660	57%	2,116,581	831,265	39%
CAGR				1.5%	2.3%		2.4%	5.5%		2.4%	4.0%	

¹ Defined as 2km drive area from Pender Street and Columbia Street.

Source: Statistics Canada, 2006 Census

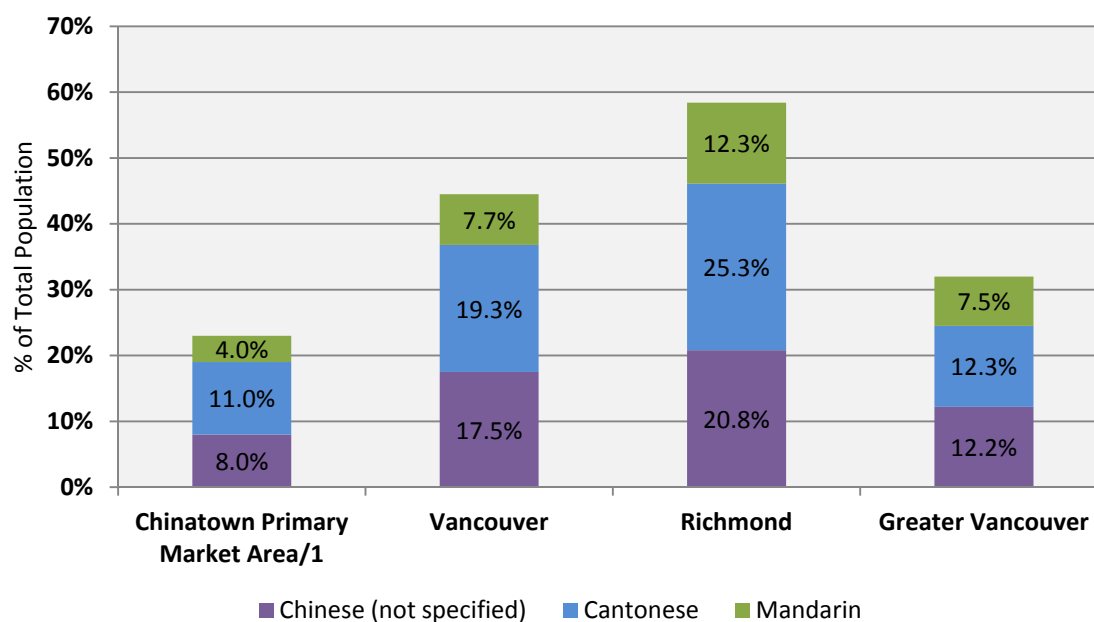
Figure III-8: Total Population (15 Years and Older) by Immigrant Generation, 2006



/1 Defined as 2km drive area from Pender Street and Columbia Street.

Source: Statistics Canada, 2006 Census

Figure III-9: Total Population by Chinese Mother Tongue, 2006

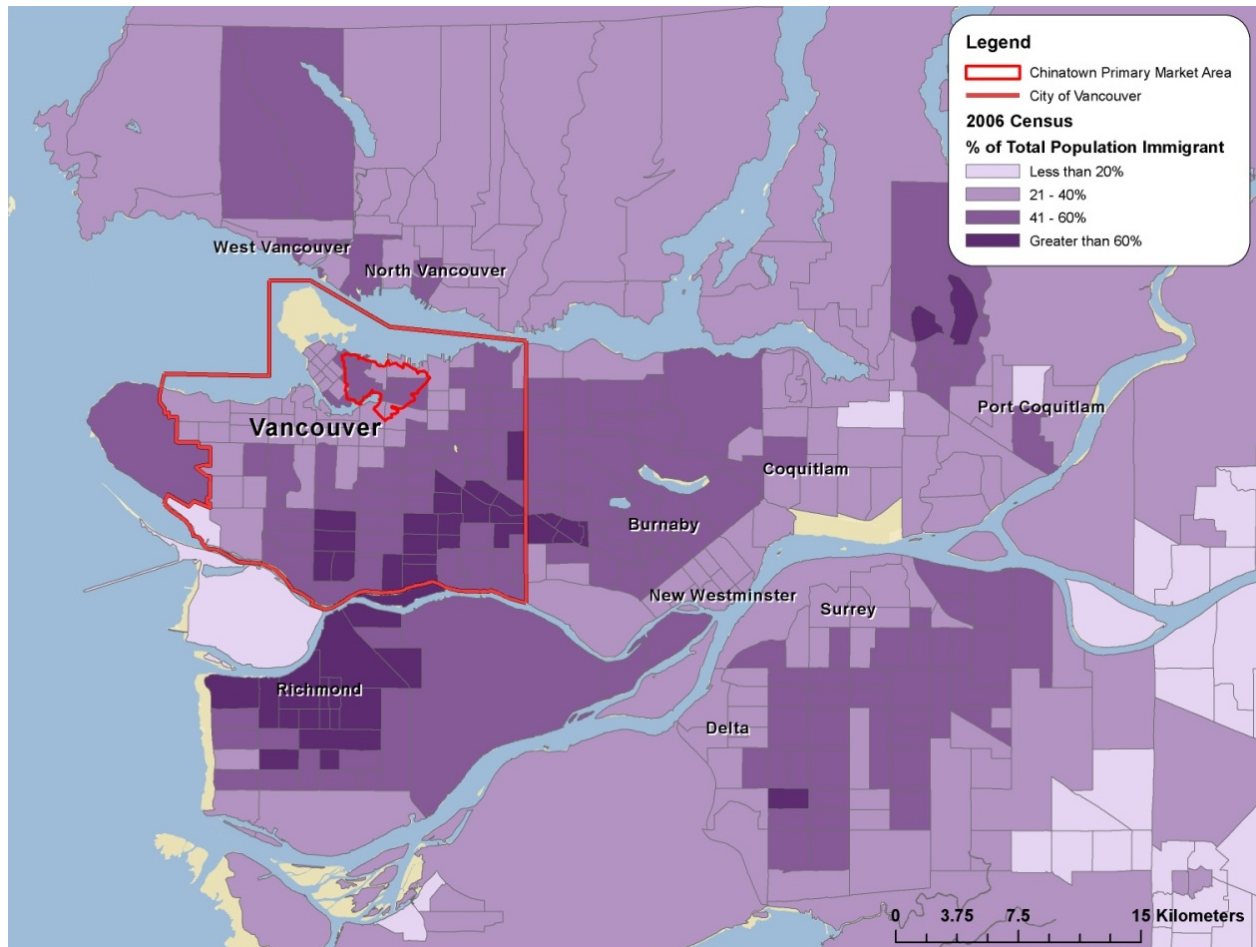


/1 Defined as 2km drive area from Pender Street and Columbia Street.

Source: Statistics Canada, 2006 Census

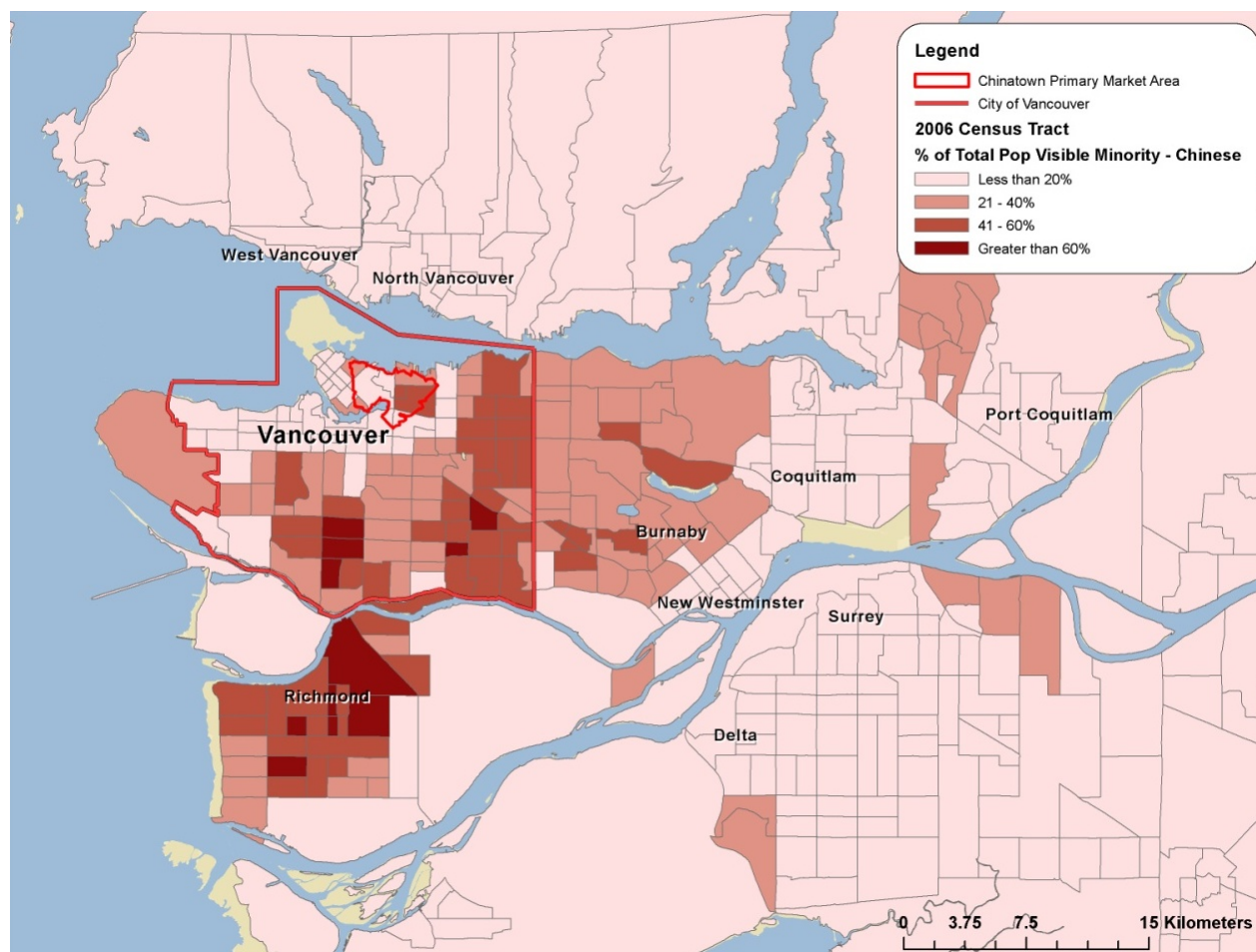
GIS 2006 Census Maps

Figure III-10: Concentration of Immigrant Population, Census 2006



Source: Statistics Canada, 2006 Census

Figure III-11: Concentration of Chinese Visible Minority Population



Source: Statistics Canada, 2006 Census

The immigration pattern can be characterized by one of dispersal. First, in contrast to a hundred years ago when the Chinese immigrant population was concentrated in the vicinity of Chinatown and as recently as ten years ago, when the concentration of new immigrants was in Richmond, the new pattern is highly dispersed throughout the Greater Vancouver region. Second, while the initial Chinese immigrants were predominantly from Southern China through the port of Hong Kong, the new immigrants come from a much more varied geography throughout China and Asia.

Tourist Market

Overnight visitors to the Greater Vancouver region have grown from 7.97 million in 2003 to 8.91 million in 2007, representing an average annual growth rate of 2.8 percent. The number of visitors

fell over the following two years to 8.1 million in 2009, however, overnight visitor growth picked up again for a 3.8 percent increase in 2010, at 8.42 million. From 2003 through 2010, overnight visitors from other parts of Canada and visitors from the United States have consistently made up about 85 percent of total visitors. In 2010, overnight visitors from Asia/Pacific comprised 8.6 per cent and visitors from Europe comprised 5.3 percent of the total. A 2007 International Travel Survey of overnight visitors to Greater Vancouver revealed that the average party size of overnight visitors was 1.7 people and the average length of stay was 4.2 days. Average spending per person per trip was \$420.29. The breakdown of spending by category is presented in Figure III-. Approximately 39 percent of overnight visitors in 2007 cited cultural activities as part of their trip itinerary. A growing tourist market indicates business potential for Chinatown restaurants and shops that are able to cater to this market.

Summary of Implications on Chinatown's Economic Future

The combination of strong population growth in the Vancouver Metro Core and the fact that Vancouver did not suffer a severe recession and the economy is already on the rebound all indicate solid residential, retail and restaurant market support for the revitalization of Chinatown in the years ahead. The immigration patterns have a twofold implication on business opportunity in Chinatown. First, Chinatown needs to broaden its restaurant offerings beyond largely Cantonese. Second, it needs to offer specialty restaurants and shops that appeal to niche Chinese or Asian markets in order to attract clientele from greater distances. In summary, the marketplace for the goods and services offered in Chinatown is changing in the following directions:

- It is coming from more varied parts of China rather than mostly Southern China.
- A greater share is going to come from Asia outside of China.
- A greater share will not be Asian due to population and employment growth in the Metro Core.
- The income of the future clientele will be mixed but likely on average higher than in the past.
- Tourists will be a market segment of growing importance.

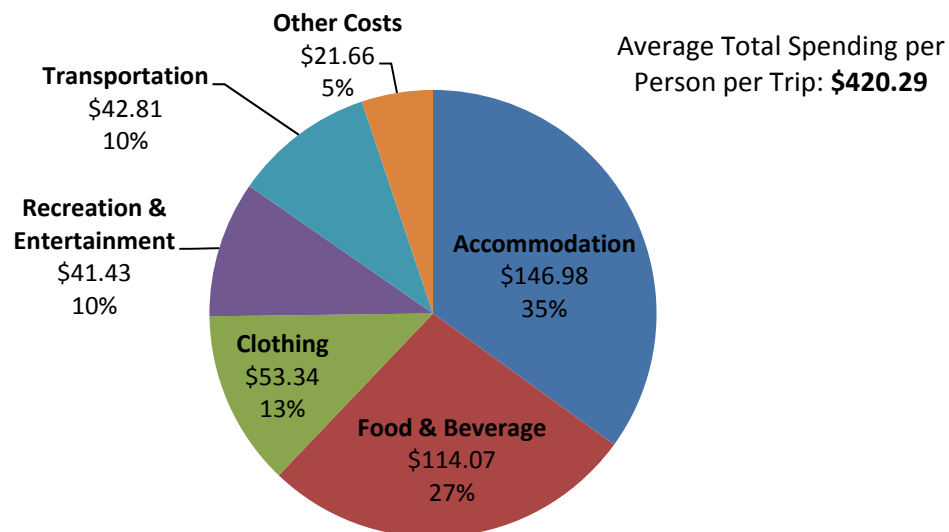
The businesses that adapt well to the increasing diversification and gentrification of the market place will have every opportunity to succeed. The restaurants and shops that continue to serve its traditional market will gradually fade away.

Table III-6: Origin of Overnight Visitors to Greater Vancouver, 2003 - 2010

	2003	2004	2005	2006	2007	2008	2009	2010	CAGR
Total Overnight Visitors	7,967,198	8,523,303	8,604,670	8,692,925	8,912,525	8,629,103	8,110,823	8,415,366	0.8%
% Change		7.0%	1.0%	1.0%	2.5%	-3.2%	-6.0%	3.8%	
<u>Origin of Visitors</u>									
Canada	4,643,673	4,952,140	5,044,993	5,191,253	5,373,504	5,310,197	5,035,092	5,206,224	1.6%
United States	2,233,251	2,294,669	2,222,935	2,169,971	2,164,873	1,953,492	1,894,257	1,924,836	-2.1%
Asia / Pacific	620,201	760,033	776,486	768,279	768,913	764,061	650,689	723,087	2.2%
Europe	360,185	400,604	433,258	433,288	454,439	448,208	410,409	443,492	3.0%
Other Int'l	109,888	115,857	127,198	130,134	150,796	153,145	120,376	117,727	1.0%

Source: Tourism Vancouver

Figure III-12: Average Overnight Visitor Spending by Category, 2007



Source: Statistics Canada, 2007 International Travel Survey Microdata

IV. Community Consultation

Communication and Consultation Strategy

A key objective of the CERAP was to engage the Chinatown community in the development of the Plan, including conducting and facilitating a series of in-depth interviews and workshops with stakeholder groups. The community's participation in plan development enhances the likelihood of successful implementation.

Consultation with residents was achieved through meetings with representative groups (e.g. seniors' housing associations, and other residents associations), in addition to outreach during the Public Workshop held in Chinatown. Also important to the future of Chinatown are property owners, business operators, potential investors, community leaders, future residents and visitors to the community, particularly youth, new generation Chinese Canadians, as well as others who may contribute to the economy and sustainability of the neighbourhood. The Communication and Consultation Strategy had several components, including small group and individual interviews, a door-to-door business survey, large public workshop and online public forum. Input and findings from each of these components are summarized below.

Small Group and Individual Interviews

AECOM conducted small group and individual interviews with key stakeholders that included local residents, family/benevolent association leaders, property owners, business operators, potential investors, real estate professionals, community leaders, future residents and visitors to the community, particularly youth, new generation Chinese Canadians, as well as others who may contribute to the economy and sustainability of the neighbourhood. A list of individuals and groups that were interviewed is included in the appendix.

Input and comments gathered from the interviews are summarized below.

Chronological Trends

- Peak rents about 30 years ago were \$10,000/month, now \$2,000/month for the same space
- Business was much better 30 years ago; Chinatown started to decline in the 1980s
- Recall that Chinatown had nightlife, intrigue and mystery in the 60s, back alley restaurants open all night and gambling
- Chinese immigrant population moved to Richmond, Burnaby and Surrey

Historic Character

- Old line retailers and restaurateurs are not keeping up with changing times (newer establishments have done quite well)

- Chinatown needs to modernize and broaden its product offerings
- Need something more updated and modern for the new generation Chinese Canadians
- Celebrate the history and contributions of Chinese in Canada
- Youth feel that Chinatown caters to older immigrants
- English signage and organic produce would be helpful
- Chinatown should have unique businesses that cannot be found anywhere else
- Chinatown should have a healthy mix of historic and modern
- Chinatown cannot remain ethnically pure – needs to become more multicultural
- Create senior housing with a focus on ethnic Chinese
- Chinese Cultural Centre building is cold and uninviting – should be the central landmark in Chinatown
- Downtown development pressure is approaching Chinatown – It is important to maintain and preserve the historic character of Chinatown
- Benevolent Association buildings are used every day as community centers for classes, martial arts, dancing, etc.
- Family or Benevolent Associations are not suited to be real estate developers or undertake major renovation for three reasons
 - Highly democratic organization that tried to make decisions on a consensus basis and not able to make executive decisions
 - Lifetime membership requires small front end payment, so Association has limited financial resources – rents do generate some income
 - Very low risk tolerance and will not put the property at risk (i.e. mortgage the property)
- Lack of innovation and energy among the leadership of Chinatown organizations

Safety Concerns

- Major concern for business owners is security (have to pay more insurance) and scaring away potential customers
- More residents and people on the street will dilute the impact of homeless and drug users

- Security issues – used to be open evenings, no longer, have wrought iron gates at night and plexi-glass windows
- Big safety fear about coming to Chinatown – people who are here daily are immune to it now, but for outsiders it is a huge deterrent
- Visible drug users on the streets have been a major issue for the last 10 years
- Chinatown business people who have spoken up against the drug users and social services have been perceived as uncaring and unsympathetic

Urban Integration

- Core of Chinatown too fragmented
- Major constraint to renovation of historic buildings is the SRO units of approximately 100 square feet located on the upper floors of many of these buildings. The consolidation and reduction of these units to contemporary standards (350 square feet) is not permitted by City policy.
- There is a shortage of performance venues in downtown Vancouver
- Development regulations and guidelines need to be made clear – height restrictions, regulations regarding historic buildings, etc.
- Need to have population, Chinatown lacks population, residents from the towers do not shop in Chinatown
- Market forces cannot work properly here because of the impact of the Hastings problem
- Connection to the Chinatown Skytrain station needs to be made more direct – many people don't realize the Skytrain station is so close
- For more youth to come to Chinatown public transit access is very important
- Housing affordable to students
- Negative stigma very visible negative image – eye sore
- Clean up the image
- Newly renovated 1,000 square foot, two bedroom apartments rent for \$1,800 to young professionals
- Trying to fix up market alley – displace the druggies with commerce along back alley
- Many refuse to do deliveries to back door/alleyways – goods get stolen, drivers attacked, etc

- Chinatown is under siege from the Hastings and Main problem

Business Climate

- Need life on the streets at night and on the weekends, social problems would be diluted by more people on the streets
- Chinatown revitalization strategy must lead with restaurant sector
- Need more varied stores and merchandise that is tourist-oriented
- Nothing to do in Chinatown after dark, closes down, nothing going on – no food, arcades, or nightlife
- Local residents shop for groceries in Chinatown
- Most likely to come to Chinatown – older immigrants, Caucasians and young professionals looking for places to hang out near downtown
- Food bloggers, social media very influential in getting people to venture into Chinatown – important for locals/tourists/Chinese and non-Chinese
- Restaurants in Chinatown are considered cheap, but not high quality
- Chinese people are not shopping in Chinatown anymore because there are so many other Chinese shops, malls and grocery stores in other areas
- Definitely need more and better restaurants - that's the heart of Chinatown
- Tourists come to Chinatown and don't find what they want
- Produce/meat/seafood stores lack quality control
- Chinatown night market is not as popular as the Richmond night market – much smaller, not as much variety of food
- Market is limited by some percentage of customers that are not willing to come to Chinatown because of the negative image and safety concerns

Business Survey

Bilingual AECOM staff conducted door-to-door verbal surveys of 77 businesses located along the main blocks of Chinatown from the 17th through the 22nd of June, 2011. The blocks covered are shown in **Figure IV-1** below and include Pender Street (from Taylor Street to Gore Avenue), Keefer Street (from Carral Street to Gore Avenue), Georgia Street (from Main Street to Gore Avenue), and Main Street (from Pender Street to Union Street).

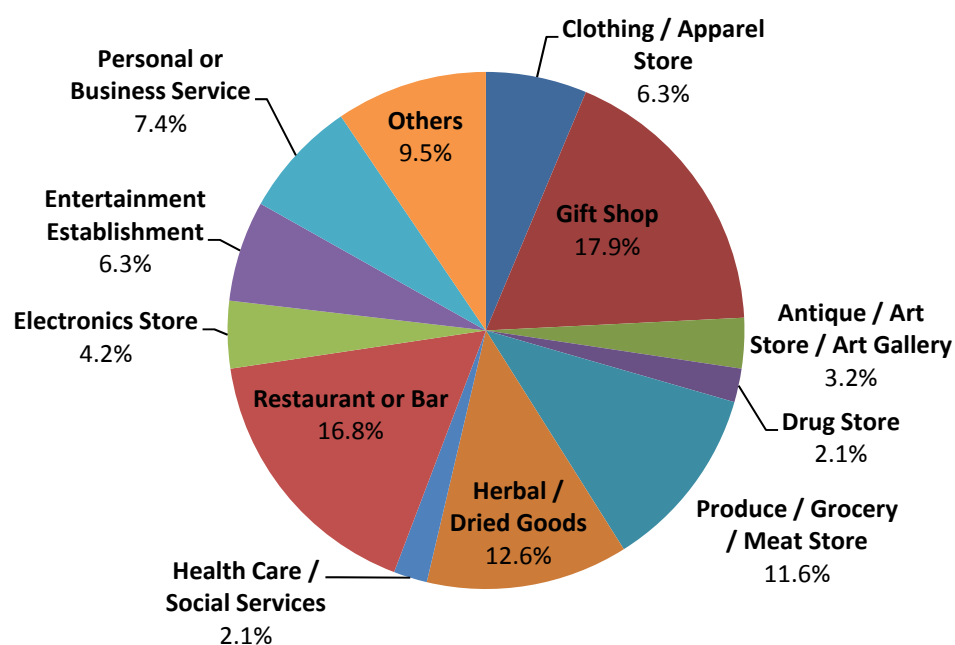
Figure IV-1: Map of Blocks Covered for Business Survey



Source: Google Maps; AECOM

Information gathered and key findings from the business survey are summarized below. Businesses surveyed by type of business are presented in **Figure IV-2**.

Figure IV-2: Businesses Surveyed by Type of Business



Source: AECOM

Of the businesses surveyed, 43 percent had been in business in Chinatown for over 15 years, 23 percent had been in business less than five years and the remaining 34 percent between five to 15 years. The oldest businesses had been continuously operating in Chinatown for over 50 years.

How long have you had a business in Chinatown?	
Less than 5 years	23%
5 to 10 years	18%
10 to 15 years	16%
More than 15 years	43%
TOTAL	100%

Approximately 80 percent of the businesses surveyed were only open during the day and fewer than eight percent were open in the late evening. Nearly half the responses to why they are located in Chinatown cited low rent/favourable lease terms. About 33 percent cited character of space and only four percent cited business reason (i.e. customer base).

Why are you located in Chinatown?	
Low rent / favourable lease terms	48%
Business reason (i.e. customer base)	4%
Character of space	33%
Other	15%
TOTAL	100%

The vast majority of the businesses surveyed in Chinatown are small, with 85 percent having fewer than five full-time employees. Over 60 percent had just one or two full-time employees. The gross floor area of business establishments averaged 1,979 square feet and ranged from 180 to 11,230 square feet. About 83 percent of the businesses paid rent and the average net monthly rent per square foot was \$1.71. Net monthly rents per square foot varied widely, from \$0.15 to \$4.33.

Customers of the businesses surveyed were mostly local residents of Chinatown and Strathcona, at 58 percent, followed by Lower Mainland residents and tourists from out-of-town. Other Vancouver residents and local employees made up just five percent of the customers. Across all categories of customers, 86 percent of businesses have seen a decrease in the number of customers over the past few years.

Please give us an estimate of who your customers are:	
% Local residents (i.e. Chinatown, Strathcona)	58%
% Other Vancouver residents	2%
% Local employees (includes Downtown)	3%
% Lower Mainland residents	21%
% Tourists from out-of-town	12%
% Other	4%
TOTAL	100%

Businesses in Chinatown are clearly struggling with 64 percent experiencing modest to substantial decrease in business revenue over the past few years. About 30 percent stated that business

revenue has stayed about the same and only six percent have increased modestly. A closer look at the few businesses that reported increased revenues reveal that they are either more newly established or cater to tourists.

Within the past few years, has your business revenue:	
Increased substantially	0%
Increased modestly	6%
Stayed about the same	30%
Decreased modestly	39%
Decreased substantially	25%
TOTAL	100%

Most businesses, 71 percent, cited "proximity to public transit" as an important factor contributing to a more competitive business environment, followed closely by "heritage environment" (65 percent) and "sense of safety and security" (48 percent). When asked what types of stores are currently missing in Chinatown, the most common responses were more restaurants; including ethnic, multicultural, small scale and more upscale, and stores that attract youth. Many also felt that there were too many herbal stores in Chinatown.

In terms of the most serious challenges of doing business in Chinatown, the businesses surveyed cited: drug use, safety and security, negative image, cleanliness, lack of parking, and lack of customers. The most commonly cited response to the greatest benefit of doing business in Chinatown was by far, the old customers, and Chinese identity and culture.

Public Workshop

A public workshop was held in Chinatown at Floata Seafood Restaurant on Wednesday, June 29, 2011. Entertainment and a light dinner were provided at the workshop. The event was publicized through bilingual flyers that were distributed to businesses and residences in the neighbourhood, announcements in the local newspaper, on the City of Vancouver's website and through email notifications. The workshop was attended by over 240 participants.

Figure IV-3: Bilingual Public Workshop Flyer



Workshop participants were seated in groups of 10-12 with one facilitator at each table.

Approximately half of the tables were facilitated by bilingual Chinese and English speakers. While the aim of the workshop was to have open discussion, the questions below were posed to facilitate the conversation. Key comments are summarized under each of the questions below.

How would you describe Chinatown today?

- All activity shuts down at 6pm, businesses close, and people disappear, making the area feel dangerous.
- Lack of accessibility, parking is too expensive and inconvenient, which reduces visitors.
- Concerns about safety in Chinatown often attributed to nearby health services for drug users, mentally ill, and destitute.
- Buildings are aging and falling into disrepair, which puts off visitors and compromises its historical character.
- What Chinatown used to provide, residents and recent immigrants will look for in Richmond and other areas that are new and lively.

- High rents keep out businesses that can cater to local residents, and make it difficult for new businesses to start, leaving a lot of empty storefronts.
- Some high points like the night market and Sun Yat Sen Garden have great appeal and are standout attractions.

What would a thriving Chinatown look like to you?

- More density, with high-rises bringing more people to shop, keeping businesses open late, and improving the push for more safety.
- Have young families living in the area, promoting the next generation of Chinatown residents.
- Clean and safe.
- Improving the selection of high-end and affordable restaurants to reflect traditional and modern Chinese culture and cuisine.
- Providing inexpensive or free services sharing Chinese culture to help preserve distinctive character.
- Appealing to a broad cross-section of people, providing a place for seniors on fixed income, tourists, and young professionals.
- Having more unique cultural institutions to appeal to tourists and locals, and stores selling unique goods.

What do you think would bring more people to Chinatown?

- Improving security, cleanliness, and building hours to make people comfortable walking the streets through the evening.
- Providing tax incentives to attract new businesses, new developments, and new residents.
- In light of parking difficulties, improve transit connections to the core of Chinatown.
- Support from tourist institutions (taxi drivers, hotel concierges) directing visitors to Chinatown.
- Cater to day-to-day needs of residents and near-residents: organic/fresh grocery stores and restaurants.

How can culture and history be a part of Chinatown's future?

- Modernize the cultural center and museum to be an attraction while preserving its neighbourhood-serving aspects.
- Spread cultural fairs and festivals throughout the year to remind people to come visit.
- Promote understanding of the role of Chinese in Canada's development.

- Preserve the historical buildings that define Chinatown's streetscape.
- Recognize that culture and history are evolving, and need to reflect modern society as well as traditional.
- Provide signs explaining cultural significance of buildings and places in Chinatown for non-Chinese speakers.
- Support local businesses and Benevolent Associations that contribute to spreading Chinatown's cultural values.

Tell us other ideas you think would help Chinatown thrive.

- English-language guided tours to help share some of Chinatown's culture and history.
- Have food festivals at convenient times -- they have a lot of appeal for all kinds of different people.
- Involve younger community members in decision-making roles to pass leadership to the next generation.
- Make the main corridor of Chinatown pedestrian-only.
- Encourage business owners to greet customers with a friendly, welcoming attitude to draw in casual visitors and tourists.

In addition to the group discussions, a workshop feedback form (included in the Appendix), was distributed to all participants. A total of 142 feedback forms were collected and analyzed. Of the feedback form respondents, almost half lived in the immediate area; 34 percent were residents of Chinatown and 12 percent were residents of neighbouring Strathcona (**Figure IV-4**). Approximately 28 percent of respondents were either, Chinatown business owners/operators or property owners, 20 percent were members of benevolent/family associations, another 20 percent were members of other clubs or organizations and the remaining 32 percent were other community members and residents.

Figure IV-4: Place of Residence of Public Workshop Feedback Form Respondents

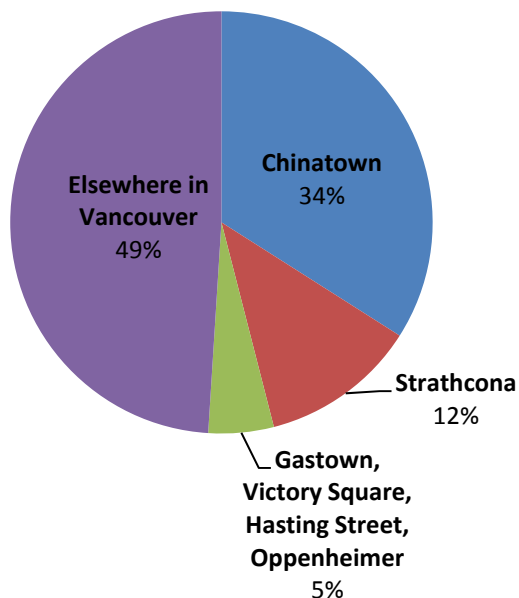
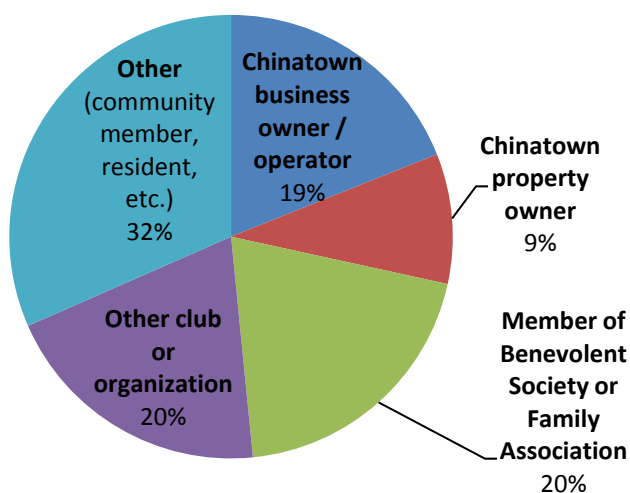


Figure IV-5: Affiliations of Public Workshop Feedback Form Respondents



Online Public Forum

The City of Vancouver's Communications department also created an online public feedback process for the Chinatown Economic Revitalization Action Plan. The online forum was another way for people to participate that were not able to attend the Public Workshop. The online forum was hosted at

PlaceSpeak (<http://www.placespeak.com/chinatown>). PlaceSpeak moderated the forum and provided the summary report.

V. Key Findings

From the research summarized in the foregoing sections, the strengths, weaknesses, opportunities and threats of Vancouver Chinatown have been identified and are summarized below.

Strengths

- Chinatown has a strong cultural identity dating back over a century to when immigrants arrived from Southern China.
- The 20 to 30 heritage buildings in Chinatown provide character and historic interest to not only the local neighbourhood, but also to the City of Vancouver and Western Canada.
- Chinatown is in the path of Downtown Vancouver revitalization and expansion.
- The Asian population in the Greater Vancouver region is increasing in both absolute numbers and as a percentage of the total.
- Several new businesses in Chinatown that target a broader clientele have been highly successful.
- The City of Vancouver has consistently invested in Chinatown, often in partnership with local organizations, and recently these include façade grants, neon lights, awning improvements, street and alley improvements, community murals, window display contests, and funding for heritage building renovation feasibility assessments.

Weaknesses

- Many local businesses are not keeping pace with changing market area demographics and contemporary consumer taste, and this is reflected in the presentation of merchandise, customer services to those who do not speak Cantonese, appearance/cleanliness of establishments, and declining business volume.
- Local social and cultural organizations need to integrate a new generation into their leadership structure in order to advance more contemporary ideas and utilize 21st century skills.
- The family associations that own the heritage buildings tend not to have the financial resources, the technical skills, the decision making structure nor the appetite for the risk necessary in undertaking renovation to bring these buildings up to current code and market standards.

- The physical appearance, cleanliness and quality of programs of the Chinese Cultural Center do not convey a strong sense of cultural pride to the greater Chinese Canadian community in Western Canada.

Opportunities

- There is an expanding local market opportunity from the growth of Downtown Vancouver and the renovation of nearby neighbourhoods like Gastown.
- The growing Chinese and Asian Canadian population represents an expanding regional market opportunity.
- The heritage buildings, if renovated, represent an unparalleled historic asset for not only Chinatown, but also the City of Vancouver. Building on that asset will translate into greater appeal and more frequent visitation by tourists and residents of the region resulting in more spending locally.
- There is a clear opportunity to broaden the restaurant offerings in Chinatown beyond Cantonese to the cuisine of many of China's different provinces and that of different Asian countries.
- When compared to its main competition - Richmond, Vancouver Chinatown is better located to serve the market area north of Vancouver, such as the communities of North Vancouver and West Vancouver.
- The finer grain street pattern and pedestrian scale of this historic district, particularly if accented by renovated heritage buildings with contemporary tenants, provide a competitive advantage over suburban districts that have little pedestrian appeal.
- Removal of the viaducts to the south, currently under discussion, may allow Chinatown to enjoy better access from the newly emerging neighbourhoods to the south.

Threats

- The presence of population attracted to the social service facilities on Hastings Street, one block to the north of Chinatown, discourages visitation, particularly after dark.
- The development of Richmond as a major Chinese Canadian community, served with many restaurants, shops and cultural facilities, has greatly diluted Vancouver Chinatown's historic appeal to that community.
- With the growth of the Chinese Canadian population, nearly all neighbourhoods in Vancouver now have Chinese restaurants and grocery stores.

- The real estate development pressures brought about by an expanding Downtown Vancouver threaten to dilute the cultural identity of Chinatown and its affordability for the low income population.

VI. Action Plan Strategies

Rationale for Action Strategies

The changing economic and demographic profile of Chinatown's market area indicates the following for its future clientele:

- It is coming from more varied parts of China rather than mostly from Southern China.
- A greater share is going to come from Asia outside of China.
- A greater share will not be Asian due to population and employment growth in the Metro Core.
- The income of the future clientele will be mixed but likely on average higher than in the past.
- Tourists will be a market segment of growing importance.

The community consultation uncovered the following key points:

- Old line retailers and restaurateurs are not keeping up with changing times (newer establishments have done quite well).
- Chinatown needs to modernize and broaden its product offerings.
- Need life on the streets at night and on the weekends, social problems would be diluted by more people on the streets
- Chinatown revitalization strategy must lead with restaurant sector.
- Definitely need more and better restaurants - that's the heart of Chinatown
- Needs to be clean and safe.
- Family or Benevolent Associations are not suited to be real estate developers or undertake major renovation.
- Major constraint to renovation of historic buildings is the SRO units of approximately 100 square feet located on the upper floors of many of these buildings. The consolidation and reduction of these units to contemporary standards is not permitted by City policy.
- Cater to day-to-day needs of residents and near-residents: organic/fresh grocery stores and restaurants.
- Modernize the cultural center and museum to be an attraction while preserving its neighbourhood-serving aspects.
- Preserve the historical buildings that define Chinatown's streetscape.

- Involve younger community members in decision-making roles to pass leadership to the next generation.
- Encourage business owners to greet customers with a friendly, welcoming attitude to draw in casual visitors and tourists.

The SWOT analysis highlighted the following major opportunities:

- The heritage buildings, if renovated, represent an unparalleled historic asset for not only Chinatown, but also the City of Vancouver. Building on that asset will translate into greater appeal and more frequent visitation by tourists and residents of the region resulting in more spending locally.
- The finer grain street pattern and pedestrian scale of this historic district, particularly if accented by renovated heritage buildings with contemporary tenants, provide a competitive advantage over suburban districts that have little pedestrian appeal.
- There is a clear opportunity to improve the physical appearance, cleanliness and quality of programs of the Chinese Cultural Center so this important organization is able to convey a strong sense of cultural pride to the greater Chinese Canadian community in Western Canada.

The action strategies recommended below flow from the investigation in the foregoing sections of the report with the key findings summarized above.

Short Term Strategies

The focus of this Economic Development Action Plan is on short term strategies that can be implemented within one or two years, and these are recommended below.

Strategy A: Improve the Appearance and Cleanliness of Chinatown with Clean-Up Parties

The general lack of cleanliness, maintenance and visual appeal of Chinatown's physical environment affects the business climate and its appeal as a destination for the both the local market and tourists. The culprits range from small businesses and their awnings, to the exterior and interior of the Chinese Cultural Center. The BIA currently commits about half its annual budget to events, marketing and promotion and an additional 12 percent on beautification and graffiti removal. AECOM recommends that the BIA expand upon its current activities and organize semi-annual Chinatown Clean-Up Parties every Spring and Fall. The key components of this strategy would include:

- BIA to recruit youth volunteers for a full day Clean-Up Party each Spring and Fall.
- BIA to provide publicity, food, drinks and live music to induce youth participation.

- Solicit the participation of the Chinese Cultural Center, other institutions and individual businesses/properties to allow their facilities to be cleaned.
- Borrow equipment from local organizations that have such equipment (e.g. power washer from the Chinese Cultural Center).
- Depending on weather and the dates of the Chinese holidays, these Clean-Up Parties should be included as part of Chinese festivals if possible.
- Provide good food and great music to ensure success – can't be cheap.

The proposed Vancouver Chinatown BIA budget for 2011-12 includes amounts for Events & Promotion, Beautification and a minor amount for Security. It currently does not budget for cleaning, and AECOM suggests that it revise its budget to include two cleaning parties a year.

As part of the “Great Beginnings Initiative” the City of Vancouver has a program to encourage the replacement of old awnings. It is called the Downtown Eastside Awning Program and targets Chinatown and Strathcona. Each grant per storefront is for 40 percent of the cost to replace the skin of the existing awning, and the maximum City contribution is \$1,500 per awning. The grant must be matched with a 60 percent contribution from the property owner or tenant participant. As an integral part of these Clean-Up parties, the BIA should target to replace a half dozen of the most dilapidated awnings at each party with selected skilled youth providing labour. Community pressure or “face” needs to be used on the property or business owners of the worst awnings for them to contribute their 60 percent share. While the program was scheduled to expire on December 31, 2009, City staff has informed AECOM that the program is still active with funds available.

Strategy B: Improve One More Alley

The City's alley improvements have contributed to improving the image of Chinatown. Shanghai Alley and Canton Alley are good examples of this success. It is AECOM's view that perhaps the most important alley has not been addressed and should be addressed. That is the alley that leads from the City built Chinatown Plaza Parkade to Pender Street. It is parallel to and one property west of Main Street. Since the Parkade is the major parking resource for those visiting Chinatown, this alley represents the main entrance to Chinatown for those parking there.

Strategy C: Retail Recruitment Strategy Targeting More Varied Chinese/Asian Restaurants

Food is central to Chinese culture. Sharing a meal with friends and family is a defining character of being Chinese. Because China is a large and mountainous country, people in different provinces over the course of centuries developed not only their own spoken dialectic, but also their own unique cuisine. While Southern Chinese eat large quantities of rice, Northern Chinese eat wheat made into

noodles, buns or tortillas and consume little or no rice. Because Vancouver Chinatown was originally settled by immigrants from Canton Province, the cuisine available in Chinatown today is dominated by traditional Cantonese cuisine. Dishes from the other 34 of 35 provinces of China are not available in Chinatown. For example, the spicy cuisine of Hunan and Szechuan provinces are not available, neither are favourite dishes from Shanghai or Taiwan. The world famous roast duck with its crispy skin from Beijing cannot be found in Chinatown, nor can the Shantung style open ended pot stickers full of onion and garlic.

With Vancouver residents becoming ever more sophisticated in their taste for different and unique foods and the Chinese immigrant population coming from many more varied parts of China, the restaurant offering in Vancouver Chinatown need to broaden from traditional Cantonese to contemporary Chinese. Restaurant offerings from other Asian countries that are China's neighbours and trading partners should be added to increase the variety of dining choices. The tremendous popularity of Phnom Penh on Georgia Street, a Cambodian restaurant operated by Chinese-Cambodians, illustrates the viability of this point. The overarching strategy is to broaden the restaurant offerings in Chinatown from almost exclusively Cantonese to Asian dominated by Chinese representing many different parts of China and to transform Chinatown into one of Vancouver's foremost dining destinations.

It would be the BIA's responsibility to identify up to ten street level retail spaces that could be successful restaurant locations. Some of these spaces would no doubt be in the heritage buildings that will likely be renovated over the next two or three years. These would be promoted as restaurant opportunity spaces. BIA staff would then:

- Identify successful restaurant operators that are already in the Vancouver region but could potentially open a second restaurant in Chinatown. The selection criteria would include Chinese restaurants: 1) offering distinctive cuisine from provinces other than Canton (e.g. Shanghai, Szechuan or Mongolian), 2) chefs with a signature dish that can be promoted effectively [e.g. Peking Duck], 3) "one of" restaurants in the region targeting selected niche markets (e.g. Muslim Chinese lamb hotpot), and 4) restaurateurs that have a flare for design, style, entertainment and presentation in addition to excellent cuisine.
- Promote the idea of a second establishment in Chinatown perhaps with a more contemporary or unique concept to these restaurateurs and target to recruit five new Chinese restaurants to Chinatown.
- Use the commercial attaché of the Canadian Embassy and various Consulate offices in China to promote restaurant investment opportunities in Vancouver Chinatown.

- Help secure grants to enhance design and tenant improvements for these new Chinatown restaurants.

Since these restaurant candidates are likely to represent a range of space requirements and price points, it makes sense, from a location relative to market perspective, to have the higher line candidates located on the Westside of Chinatown and the more value oriented restaurants located on the Eastside. Once Chinatown has successfully added five new Chinese restaurants, repeat the recruitment process for four or five other Asian restaurants, again targeting distinctive offerings. Candidates would include Vietnamese, Thai, Korean (North Korean to be unique), Japanese, Indian, Singaporean, Indonesian, etc.

With the new restaurants in place to enhance the vitality of Chinatown especially during the evenings and weekends, retail shops will follow. The shops that would best be able to take advantage of the renewed vitality of Chinatown are gift shops, boutique apparel, high design furnishing, art galleries, and specialty food shops. Some of these shops will reflect an Asian sensibility and others will reflect contemporary Vancouver. In terms of recruitment effort, the priority should be placed on creating a vital restaurant district to gain the essential evening and weekend pedestrian vitality.

Strategy D: Tenant Retention

Some of the businesses in Chinatown lack the skills involved in running a successful small business able to appeal to multiple market segment and to respond to changing consumer preferences. These businesses are barely surviving and many are not likely to survive without learning to improve their operating practices. Yet these businesses play an important social role by serving a segment of the local population that has limited options due to language and income. AECOM recommends that the Chinatown Merchants' Association take a leadership role in the following:

- Encourage these businesses to improve their window displays possibly in partnership with a local design school.
- Provide customer service training for selected key businesses.
- Encourage bilingual signage.
- Encourage a group of businesses to remain open one more evening a week.

Intermediate Term Strategies

Many of Chinatown's challenges are more systemic in nature and will require a more sustained effort to address. The following are strategies that can start promptly but will likely require three to five years to implement.

Strategy E: Renovate Heritage Buildings

According to the Vancouver Heritage Foundation, Chinatown has 19 heritage buildings. These buildings define the physical character of Chinatown and provide a “sense of place” that cannot be replicated by other parts of Vancouver. If renovated to reflect the era of their initial construction, these buildings would form a collection of important assets for the revitalization of Chinatown and for the city of Vancouver’s tourism appeal. The central challenge to the revitalization of these buildings is the fact that 16 or 17 of the buildings are owned by benevolent or family associations. The Vancouver Heritage Foundation calls these “Society Buildings.”

These societies were formed in an era of discrimination to provide its members with shelter, services, financial support by pooling assets and a sense of community. Lifetime membership in the society typically required the right family name and a nominal front end payment. Today these society buildings serve the function of social club and community center for their members. They are used for meetings, classes, games and other social functions. Income for maintenance and operation of these society buildings are derived from donations and rent from ground floor retail or restaurant tenants, upper floor residential tenants, and users of the function space on an event basis.

The Challenges to Renovation

With a large majority of these buildings built between the 1890 and 1930, these century old buildings are all in need of serious renovation. Electrical and mechanical systems need to be brought up to date. Structural reinforcement to meet current earthquake standards is critical. Walls, floors, ceilings, windows and doors all need renovation or replacement. However, the society ownership of these buildings represents a major challenge to their renovation for the following reasons:

- While the more affluent societies have rental income and cash reserves, the amount of committable cash reserve typically falls well short of the cost of renovation. Depending upon the financial health of the society and the cost of building renovation, the short fall likely ranges from a couple of hundred thousand to several million dollars per building.
- Being board-based membership organizations accustomed to making decisions on a consensus basis, these societies are not well suited to take decisive action that involve financial risk. These organizations will not place their buildings at risk through a mortgage nor are they interested in selling the buildings. As organizations, these societies are the polar opposite of real estate development entities – well capitalized, decisive and with appetite for risk – and cannot be expected to behave like such entities.
- The upper floors of some of these buildings are leased to hotel operators that operate single room occupancy hotels (SROs). The renovation of these buildings will reduce the number of

SRO units offered because the structural reinforcing will take space and contemporary standards require the units be larger than hotel rooms of one hundred years ago. However, the reduction in the number of SRO units is prohibited by City ordinance which effectively stifles the renovation of the SRO portions of these buildings. The rents that can be charged for the ground floor retail spaces and the market orientation of the retail tenants will be influenced by the residents living upstairs.

An Opportunity Worth Pursuing

While the challenges are substantial, the renovation of these heritage buildings represents an unparalleled opportunity for Chinatown and a worthwhile investment for Vancouver, British Columbia and Western Canada. If a cluster of these society buildings can be renovated, the economic development implications would be substantial and would include the following:

- The physical improvements to the buildings, with particular attention to the upgrading of façade and ground floor retail spaces, will increase both rents and property values in the blocks of Chinatown where these heritages buildings are clustered.
- The newly renovated ground floor retail spaces would be available for more contemporary restaurant and retail offerings that will help redefine Chinatown going forward.
- The more attractive renovated historic properties with more contemporary restaurant and retail offerings will attract increased patronage from Vancouver residents and tourists.
- The additional pedestrian activity, particularly in the evening hours, will dilute the influence of the underprivileged population.
- A more attractive Chinatown with numerous restored heritage buildings and more contemporary shops and restaurants will serve to strengthen Vancouver as a tourist destination.

Role of Existing Organizations and Their Limitations

Chinatown currently has a number of organizations that play some role in economic development. However, as summarized by the chart below, none of these organizations are well suited to take on the development risk inherent in the renovation of the heritage buildings.

Organization	Activities / Overview	Limitations
Chinatown BIA	Focus on improving Chinatown's image and business promotion	Spends 50% of budget on events and promotion and 12% on beautification Responsible to participating property owners Difficult to take decisive action on individual projects
Chinatown VCRC	Policy advisory committee	Not designed to implement projects
Chinatown VCMA	Focus on needs of existing Chinatown merchants	Responsible to merchants Unable to raise money Unable to take on development risk
Building Opportunities with Business (BOB)	Revitalize and improve inner-city business opportunities, retention and employment	Limited scope Possible limited capacity
Family Associations	Provide social programming and community support for members	Unable to raise money Unable to take on development risk Most viewed as fairly insular
Chinese Cultural Centre	Promote and foster understanding of Chinese culture through maintenance of cultural facility, educational programming and exhibits	Currently do not have organizational capacity to undertake major projects Mission is not development

An Organization Designed to Overcome Challenges and Exploit Opportunity

The key to success, addressing a current void, is the creation of an organization with the following objectives and capabilities:

- Has as its central objective, the restoration and adaptive reuse of the heritage buildings in Chinatown.
- Has a Board of Directors that is well respected not only in Chinatown, but throughout the Vancouver community.
- Has strong staff capability in real estate development, adaptive reuse and social housing.
- Operates as a non-profit development corporation which acts for the benefit of the community, in contrast to a for profit development entity that requires 20 to 30 percent return on each development project.
- Has the ability to take the development risk off the heritage buildings without gaining ownership of these buildings.
- Has the ability to administer a revolving loan fund with the ability to use the income earned from earlier projects to fund later projects.

- Has a parallel charitable foundation that is both a grantee and a grantor. The staff needs to be skilled in fundraising and handling government programs designed to encourage the renovation of heritage buildings.

Sample Strategy One - Typical Society Owned Heritage Building

This hypothetical building has underutilized retail space on the ground floor and society uses on the upper floors. The planned improvements include renovation of the ground floor retail spaces and restoring the façade to its heritage character. Assuming the feasibility study has been completed with the required improvements defined and renovation cost estimated, the non-profit Chinatown Heritage Buildings Renovation Corporation (HBRC) and the Benevolent Association (BA) building owner would negotiate a building renovation agreement that has the following components:

- Depending upon the nature of the improvements required – tenant improvements or building improvements - the HBRC either signs a master lease for the ground floor spaces for one dollar a year or forms a new legal entity to gain strata title of the ground floor with the HBRC serving as general partner and the BA taking on the role of limited partner.
- The HBRC would provide funds for the renovation of the ground floor spaces and fully control the renovation process. The BA would provide funds for the façade and upper level improvements subject to the availability of cash reserves. In addition, the BA would forego the rent from the ground floor spaces for up to 15 years.
- The HBRC expends the initial seed grant from the revolving loan fund, renovates the ground floor spaces, and recruits new tenants that are willing to pay rents higher than when the building was in deteriorated condition.
- The HBRC recovers its investment plus an agreed upon interest amount (5 to 8 percent) from new retail tenant rent collected. Once the investment plus interest is fully recovered or at the end of the 15th year, the space reverts back to the BA. At that point, either the master lease is terminated or the strata title entity is dissolved. The BA will at that point regain full ownership and control of the renovated building.
- The rent collected from the ground floor leases during the period of HBRC control would be placed back into the revolving loan fund and made available to fund other projects.
- To the extent grant funds are available they could be injected to offset extraordinary renovation cost such as earthquake retrofit construction.

Sample Strategy Two - Similar Society Owned Heritage Building with SRO Hotel

This second hypothetical society building has ground floor retail space, three levels of SRO units and society function space on the top floor. For all but the SRO units, the strategy described above still

applies. For the SRO floors to be renovated, the number of units will need to be reduced to have the renovated units conform to more contemporary standards and to accommodate the structural requirements of new earthquake standards. In order to satisfy the City's policy objective of no loss of social housing units, the HBRC would need to sponsor the construction of a new social housing project either in or near Chinatown and have the units in this new project serve as replacement units for the units lost in the heritage building renovation. Other government funds are presumed to be available for such housing projects. In this case, the BA building owner would pay a fee for every unit lost, and that fee would contribute to the construction of this new social housing project. The fee would need to be set high enough to make a meaningful contribution toward the construction of these new units but not so high as to discourage the renovation of the SRO portion of the BA buildings.

The City of Vancouver has a grant programs that could be used to support the rehabilitation of these heritage buildings. It is the *Chinatown Active Storefront Program*, which has as its objective to reduce commercial vacancies and deliver building renovations that reflect the contemporary identity of Chinatown and are compatible with the historic character of the area. The applicant to the program must be a registered non-profit organization in order to receive funds from the City. The maximum grant per eligible building is \$50,000. The HBRC would be an ideal organization to apply for these and other grant.

Implementation and Funding Requirements

Successful implementation of this strategy will require both strong leadership and significant front end funding. The recommended key steps and responsibilities are as follows:

- City of Vancouver sponsors the creation of a pair of new organizations: 1) Chinatown Heritage Building Renovation Corporation (HBRC), and 2) Chinatown Heritage Building Foundation (CHBF).
- City and Chinatown leadership form a committee to nominate a Board of Directors for both organizations with the ability and interest to provide seed monies.
- Initial seed money of one million dollars is required for three to four years of HBRC and CHBF operation – rent, utilities, staff salaries and contract services. The Board Members of these two organizations would have responsibility for fund raising with the City committing to provide a dollar match for each dollar raised up to \$500,000.
- Initial seed money of at least two million dollars is required for the establishment of a revolving loan fund available to renovate these heritage buildings. The Board Members will be responsible for the initial fundraising from private donations with the City committing to provide a dollar for dollar match, up to one million dollars.

- The community has 12 months from creation of these organizations to raise the \$1.5 million required seed money after which the City's matching obligations terminates. The City's commitment is contingent upon the leadership in the Chinese-Canadian community stepping forward with funding.

Strategy F: Reinvigorate the Chinese Cultural Centre

Reason for Strategy

The reinvigoration of the Chinese Cultural Centre is an important component to revitalizing Vancouver's Chinatown, both due to its institutional role as well as its physical presence.

- Cultural facilities typically play a critical role in attracting resident and visitors to neighbourhood ethnic districts. In this case, robust cultural programming targeting second and third generation Chinese Canadians, tourists, and non-Chinese Canadian residents with interest in Chinese culture can help attract people and their spending to Chinatown.
- The Chinese Cultural Centre occupies a prime (and large) physical space at the entrance of Chinatown from Downtown Vancouver and should be a major asset for the community.
- The Chinese Cultural Centre is not currently functioning as a major driver of visitation to the community, and has several problems including fairly narrow programming, deferred maintenance, and other issues.
- We believe that given its site location, size, and institutional role, the Chinese Cultural Centre should serve as a source of pride for the Greater Vancouver or Western Canadian Chinese community and be a major attractor of visitors to Chinatown.

Overview of Strategy

The key to any strong not for profit organization is an active and vibrant board of directors who can bring financial, technical, human, and other resources to the organization. Many cultural organizations have "working" boards with a mix of individuals who can fundraise (the traditional role of boards) as well as create programs, organize events, and develop collaborations with other institutions. The Chinese Cultural Centre Board currently operates as a "representative" style board focused on oversight. The Board appears to lack meaningful term limits. In order for this organization to be vibrant into the future, the Board needs to transition from one primarily concerned with representation and oversight to membership based upon a wide variety of skills and the ability to bring resources to the organization. A proactive Board could raise funds and develop a strategy for the organization that would position it for long term success.

Board Structure and Requirements

The Board should include not less than 15 but no more than 21 members, with membership spanning a maximum of two consecutive three-year terms. There should be a requirement for a minimum financial contribution and/or service hours to the organization, and there should be a mix of individuals from within and outside of Chinatown. The focus of Board recruitment efforts should be on resources and skills rather than on representation; and the Board should include people with access to financial resources, professionals with specific skill sets (i.e. finance, accounting, legal, real estate, tourism, education, etc.), and people with relationships to other organizations who could be strong financial partners for the Chinese Culture Centre.

Board Development / Transition

The process of Board restructuring is likely an interim strategy that will likely require City of Vancouver involvement, given their relationship as landlord. Establishing criteria for new Board members, recruiting new Board members, and providing Board development support for the new Board are all critical tasks which will need to be completed.

Priorities for New Board of Directors

The priorities for the organization with a new board of directors should range from short term to long term. Ultimately, the goal for the organization should be to be the development of a robust array of programming that is relevant to existing resident and tourist market segments. Specific tasks and priorities should include the following:

- Hiring of an Executive Director with the leadership ability and skills required to transition the organization to a more active and viable one.
- Developing a basic annual maintenance plan and longer term maintenance plan for the facility, including addressing deferred maintenance issues as soon as possible.
- Establishing a broader mix of funding sources for the Chinese Cultural Centre, including a mix of earned and contributed income, where contributed income comes from individuals, foundations, corporations, and other entities.
- Creating one or two “signature” programs that are relevant to existing target market segments and bring resident and tourist visitors to Chinatown on a regular basis.
- Developing a state of the art permanent exhibit incorporating the latest in exhibit design and exhibit technologies that teaches people about the history of Chinese in Vancouver / Canada and Vancouver Chinatown.

- Partnering with other not for profit institutions (i.e. the Sun Yat Sun Gardens), private corporations, foundations, the City, and other community groups to develop an active calendar of events, programs, and activities.
- Developing a marketing and public relations plan that works closely with other organizations to attract people to Chinese Culture Centre programs.

Finally, once a new Board of directors is in place, they may eventually want to consider redevelopment that might provide better usage of the site, while still being sensitive of adjacent uses. This site, owned by the City of Vancouver, is of sufficient size that it can be redeveloped in a manner that satisfies multiple objectives: cultural, social, financial and symbol of entrance to Chinatown.

Strategy G: Marketing

Once a number of the recommended program elements are in place, ongoing marketing will be important to sustain success. The BIA has the primary marketing responsibility, and AECOM recommends the following for each market segment:

- Primary Market – Bring back and expand shopping tours in Chinatown to highlight the new and unique stores and restaurants.
- Secondary Market – Emphasize the new restaurants and new programs at the Cultural Center.
- Tertiary Market – Highlight shops and restaurants that serve niche markets and direct most of the marketing dollars to the north (North and West Vancouver).
- Tourist Market – Invite the hotel concierges to experience the new programs at the Cultural Center and the new and unique restaurants in Chinatown.

VII. Appendix

List of People / Groups Interviewed

Person	Company / Affiliation
Albert Fok	Vancouver Chinatown BIA
Alice Chiu	Chinatown Property Owner
Anna MacLellan, Anna McLean	Chinatown Business Owners, Duchesse Vintage
Bill and Steve Wong	Chinatown Business Owners, Modernize Tailor
Bob Sung	Chinatown Tour Guide
Boe Iravani	Cushman & Wakefield
Bryan Walhovd	Chinatown Property Owner
Catherine Casu	Chinatown Property Owner
CBIA Youth Group	
David Porte	Porte Development Corp
Derek Gent	VanCity Community Foundation
Fontaine Wong	Chinatown Business Owner, Ming Wo
Fred Mah	Chinatown Society Heritage Building Association Mah Family Assoc
Grace Wong	Van City
James Johnstone	Chinatown Property Owner
Janey Lum	Chinatown Property Owner
John Atkin	Chinatown Historian
John Stovell	Reliance Property
Judy Maxwell	Chinese Canadian Military Museum
Martha Burton	Renewal Partners, TIDES Board Member
Michael Bennett and Daniel Poulin	Chinatown Business Owners, Peking Lounge Furnishing
Milton Wong	HSBC Asset Management

Pappajohns Family	Investor in East
Peter Vaisbord	City of Vancouver, Coordinator of BIA Programs
Rick Lam	Shon Yee Family Association
Robert Fung	Salient Group
Robert Graf	Chinatown Property Owner
Jack and Rod Chow	Chinatown Business and Property Owners
Russell Baker	Chinatown Business Owner, Bombast Furniture
Shirley Chan	Building Opportunities with Business (BOB)
Tim and Ken Ng	Chinatown Business Owner, New Town Bakery
Tony Lam	Vancouver Chinatown Merchants Association
Vancouver Film School	
VCRC	
Will Lin	Rize Alliance Properties

Business Survey Form

VANCOUVER CHINATOWN STREET LEVEL BUSINESS SURVEY

1. What best describes your type of business (survey staff can fill out if obvious):

<input type="checkbox"/> Clothing/Apparel Store	<input type="checkbox"/> Furnishing & Appliance Store
<input type="checkbox"/> Gift shop	<input type="checkbox"/> Financial Institutions
<input type="checkbox"/> Antique/art store/art gallery	<input type="checkbox"/> Stationary/book store
<input type="checkbox"/> Drug Store	<input type="checkbox"/> Electronics Stores
<input type="checkbox"/> Produce/grocery/meat store	<input type="checkbox"/> Entertainment Establishment
<input type="checkbox"/> Herbal/Dried Goods	<input type="checkbox"/> Personal or Business Service
<input type="checkbox"/> Health Care / Social services	(i.e. real estate, beauty shop, insurance, etc.)
<input type="checkbox"/> Restaurant or bar	<input type="checkbox"/> Wholesale
<input type="checkbox"/> Education	<input type="checkbox"/> Religious, social, business organizations
<input type="checkbox"/> Other (Please Specify) _____	
2. When was your business established?
3. How long have you had a business in Chinatown?

a. <input type="checkbox"/> Less than 5 years	c. <input type="checkbox"/> 10 to 15 years
b. <input type="checkbox"/> 5 to 10 years	d. <input type="checkbox"/> More than 15 years
4. What are your business hours (can select more than one):

a. <input type="checkbox"/> Daytime	c. <input type="checkbox"/> Late evening
b. <input type="checkbox"/> Evening	d. <input type="checkbox"/> Other
5. Why are you located in Chinatown?

a. <input type="checkbox"/> Low rent / favourable lease terms	c. <input type="checkbox"/> Character of space
b. <input type="checkbox"/> Business reason (i.e. customer base)	d. <input type="checkbox"/> Other
6. Including proprietors and managers, how many employees work at your establishment?

a. <input type="checkbox"/> Full-time	b. <input type="checkbox"/> Part-time
---------------------------------------	---------------------------------------
7. What is the approximate gross floor area of your business establishment?
 _____ square feet
8. What is your net monthly rent ? \$ _____ Don't pay rent, own the unit _____

9. Please give us an estimate of who your customers are:
- | | |
|--|-------------------------------------|
| a. ____ % Local residents (e.g. Chinatown, Strathcona) | d. ____ % Lower Mainland residents |
| b. ____ % Other Vancouver residents | e. ____ % Tourists from out-of-town |
| c. ____ % Local employees (includes Downtown) | f. ____ % Other |
10. How have your customers changed over the past 5 to 10 years? (increased or decreased – survey staff can put up arrow or down arrow)
- ____ Local residents (e.g. Chinatown, Strathcona)
- ____ Local employees (e.g. includes Downtown)
- ____ Lower Mainland residents
- ____ Tourists from out-of-town
11. Within the past few years, has your business revenue:
- ____ Increased substantially
- ____ Increased modestly
- ____ Stayed about the same
- ____ Decreased modestly
- ____ Decreased substantially
12. What are your approximate gross sales per square foot per year? (if sales per square foot are unknown, please provide a range of annual or monthly revenue)
- | | |
|-------------------------|------------------------|
| a. ____ Less than \$200 | d. ____ \$400 to \$500 |
| b. ____ \$200 to \$300 | e. ____ Over \$500 |
| c. ____ \$300 to \$400 | |
| f. ____ Monthly | g. ____ Annually |
13. What factors do you feel contribute to a more competitive business environment in Chinatown?
- ____ Being in a ground floor space
- ____ Sense of safety and security
- ____ Customer parking
- ____ Proximity to public transit
- ____ Heritage environment
- ____ Others – Please specify _____
14. What types of stores or services should be in Chinatown but are currently missing?

15. Which types of retail stores or services are too numerous in Chinatown?
16. For your business, what is the most serious challenge of doing business in Chinatown?
17. For your business, what is the greatest benefit of doing business in Chinatown?
18. What types of projects would help stimulate daytime and/or evening activity in Chinatown?
19. Do you have any other comments, ideas, or suggestions related to economic development in Chinatown?

For Survey Staff to Fill Out:

Name of Business: _____

Address: _____ Phone: _____

Respondent: _____ Title: _____

Primary Business: _____

Workshop Feedback Form



June 29, 2011

Chinatown Economic Revitalization Action Plan - Feedback Form

振興華埠經濟行動計劃－意見書

Thank you for attending this Workshop. Please complete the questions below. If you require clarification, please speak to a staff member in attendance.

謝謝你出席這個公眾研討會。請填答以下的問題。如你需要說明，請向與會職員查詢。

1. Please tell us where you live. Please check one only.

請告訴我們你住在什麼地區。請只選一個答案。

<input type="checkbox"/>	Chinatown 華埠
<input type="checkbox"/>	Strathcona 士達孔拿
<input type="checkbox"/>	Gastown, Victory Square, Hastings St, Oppenheimer 煤氣鎮、勝利廣場、喜士定街、奧本凱馬區
<input type="checkbox"/>	Elsewhere in Vancouver 溫哥華市其他地區
<input type="checkbox"/>	Other (please specify _____) 其他 (請註明: _____)

2. Please check if any of the following apply to you:

請選擇以下任何適用你的項目：

<input type="checkbox"/>	Chinatown Business Owner / Operator 華埠商業東主/經營者
<input type="checkbox"/>	Chinatown Property Owner 華埠物業業主
<input type="checkbox"/>	Member of Benevolent Society and Family Association 公所和宗親會會員
<input type="checkbox"/>	Other Club or Organization (please specify _____) 其他會所或組織 (請說明 _____)

3. How did you hear about the event?

你是如何知道此活動的？

<input type="checkbox"/>	Newspaper Advertisement (Courier, Ming Pao, Sing Tao) 報章廣告 (Courier, 明報, 星島)
<input type="checkbox"/>	Flyer Drop-off at your business or residence 派發給你商業或住宅的傳單
<input type="checkbox"/>	Chinatown Night Market 華埠夜市
<input type="checkbox"/>	Email notification 電郵通知
<input type="checkbox"/>	Other (please specify _____) 其他 (請說明 _____)

4. How would you describe Chinatown today?
你如何形容今日的華埠？

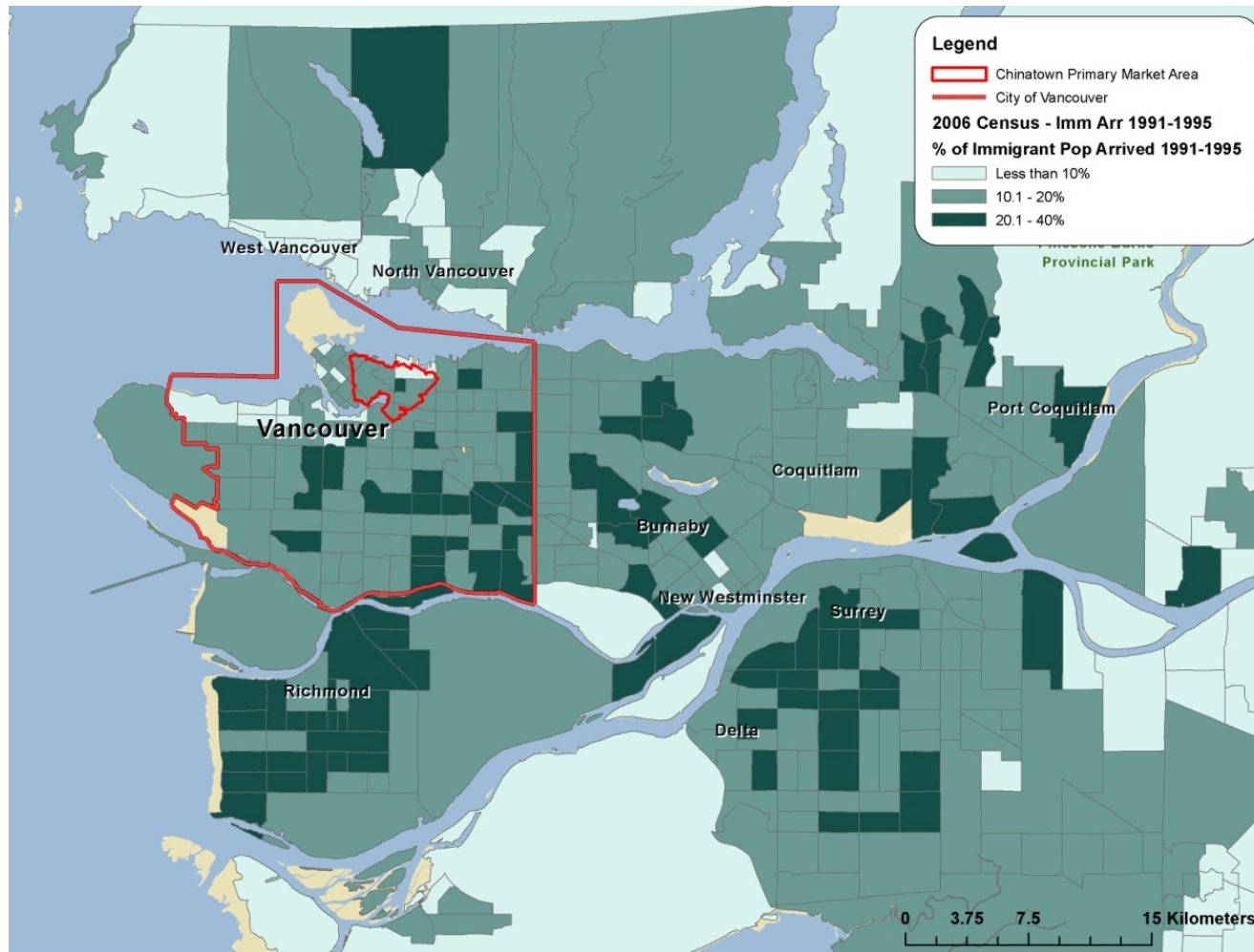
5. What would a thriving Chinatown look like to you?
一個興旺的華埠，對你來說，是什麼樣子？

6. What do you think would help bring more people to Chinatown?
你認為如何可幫助吸引更多人來華埠？

7. How can culture and history be part of Chinatown's future?
如何在華埠的未來保持其文化和歷史？

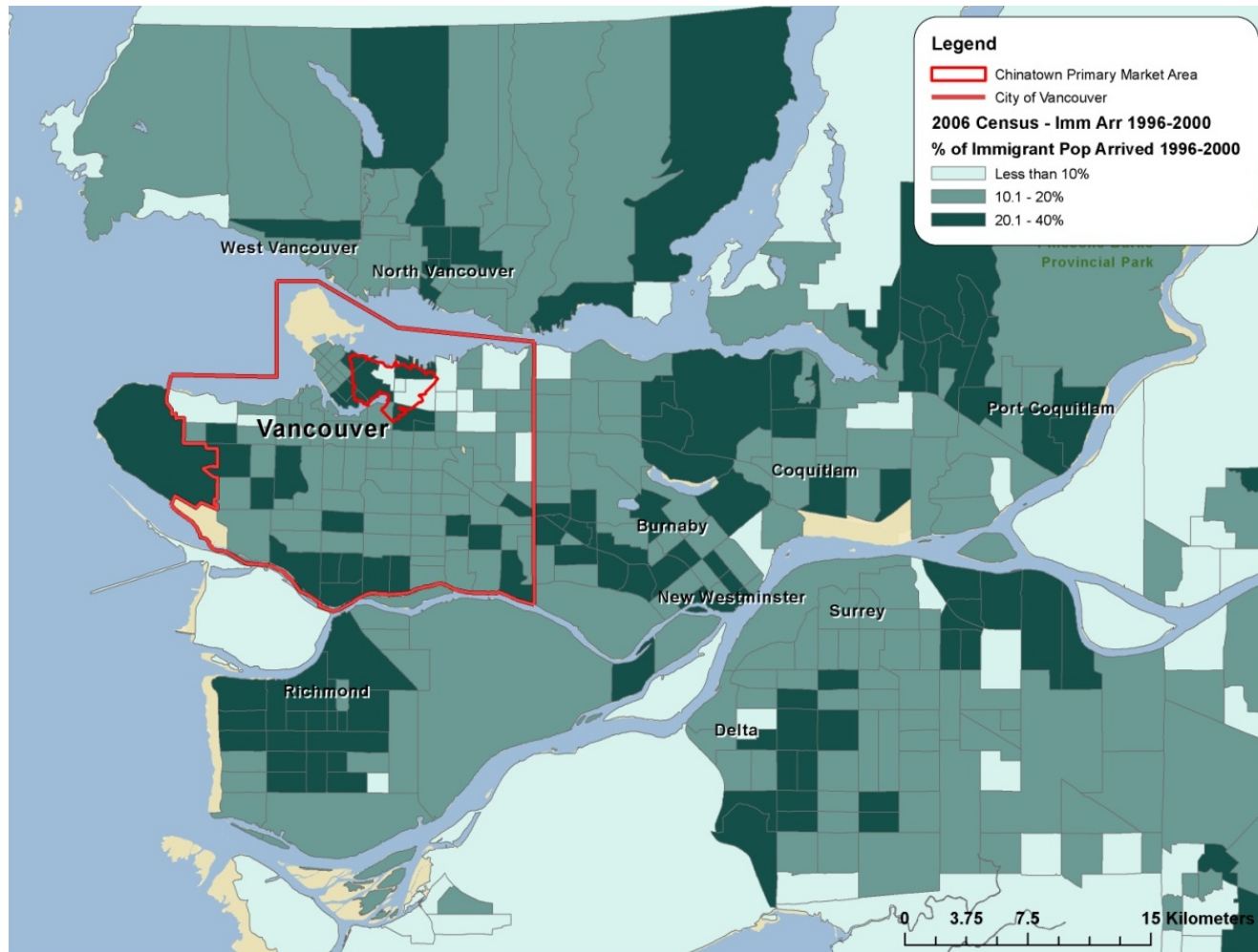
8. Tell us what other ideas you think would help Chinatown thrive.
告訴我們你認為什麼其他意念可幫助振興華埠。

Figure A-1: Concentration of Immigrant Population that Arrived 1991 - 1995



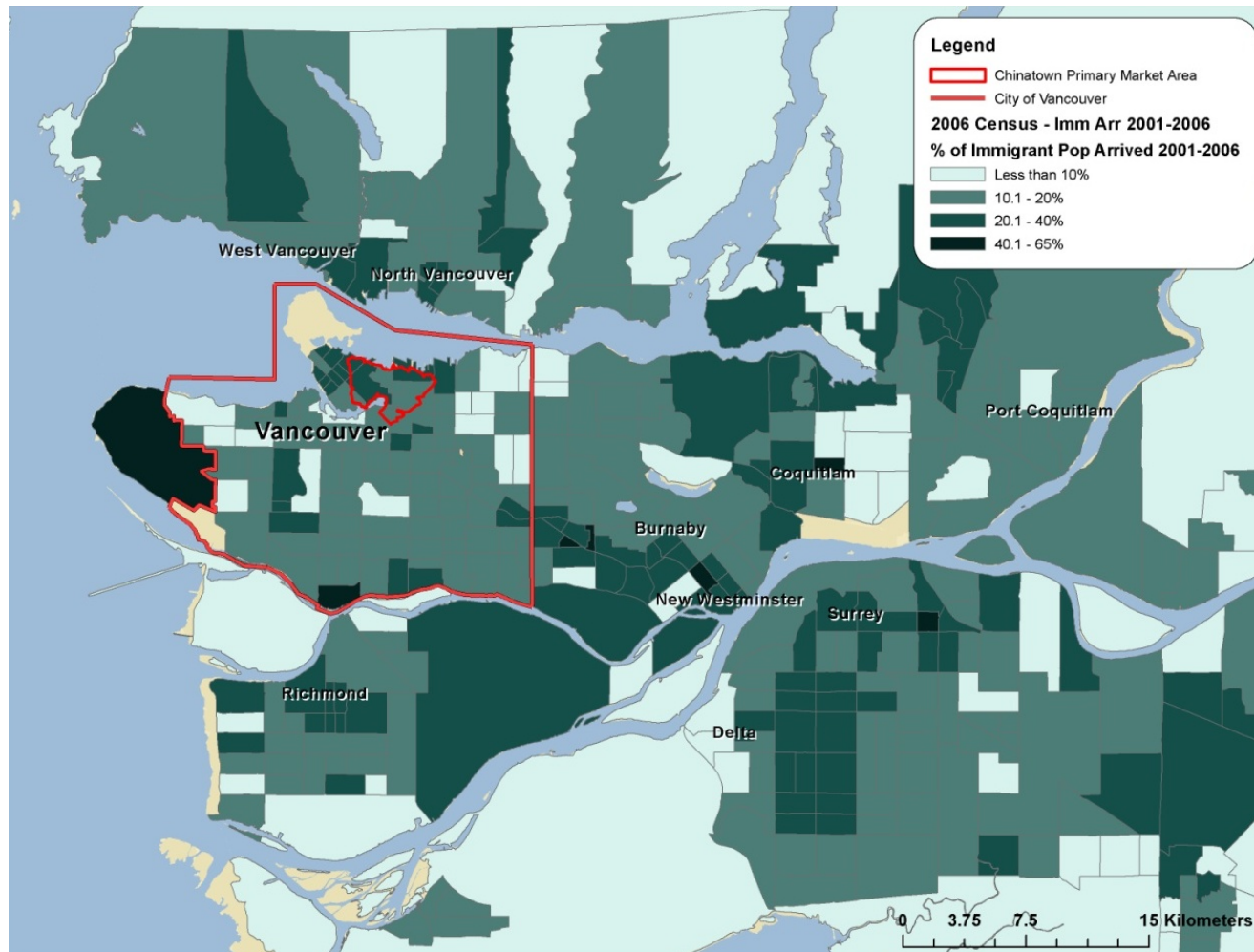
Source: Statistics Canada, 2006 Census

Figure A-2: Concentration of Immigrant Population that Arrived 1996 - 2000



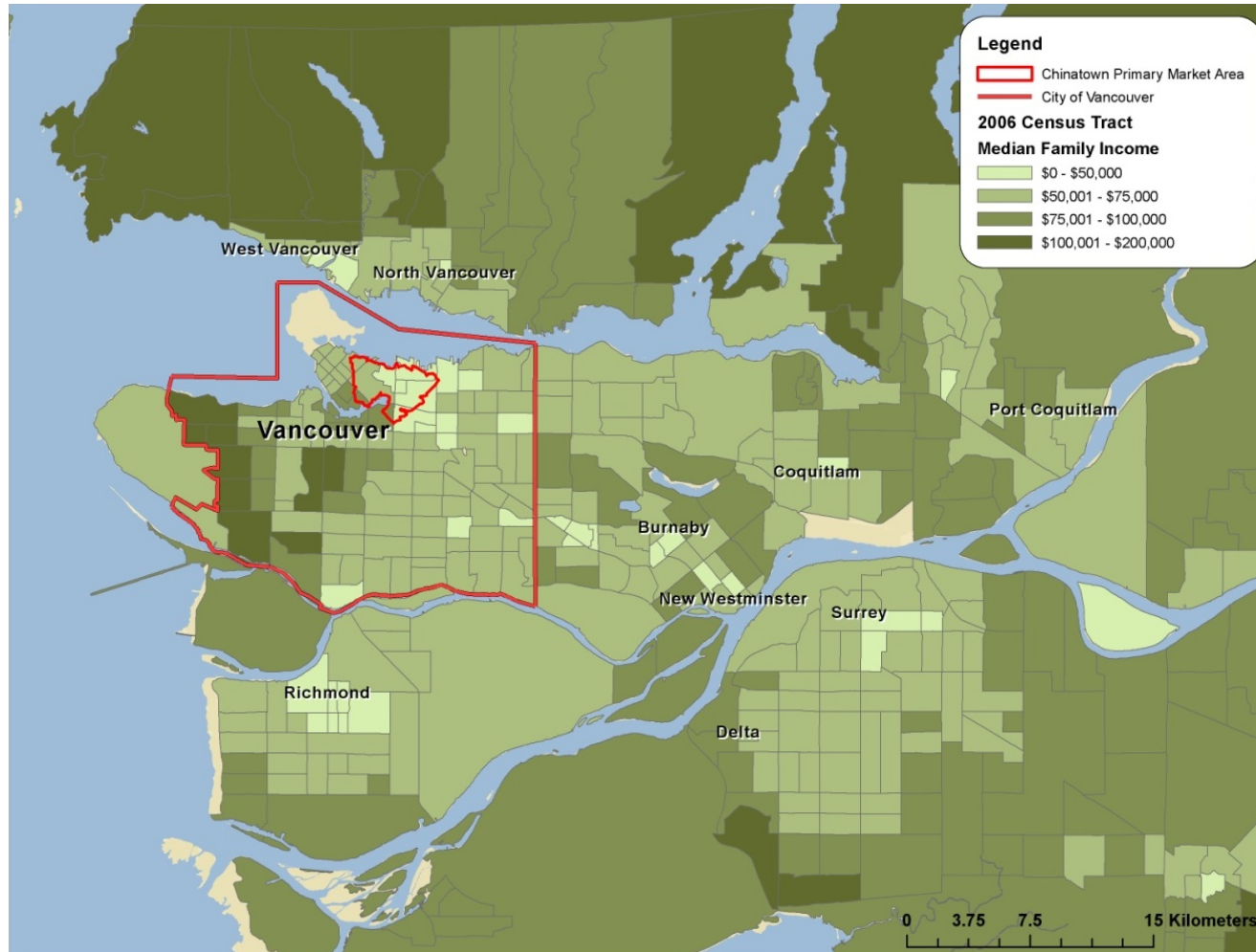
Source: Statistics Canada, 2006 Census

Figure A-3: Concentration of Immigrant Population that Arrived 2001 - 2006



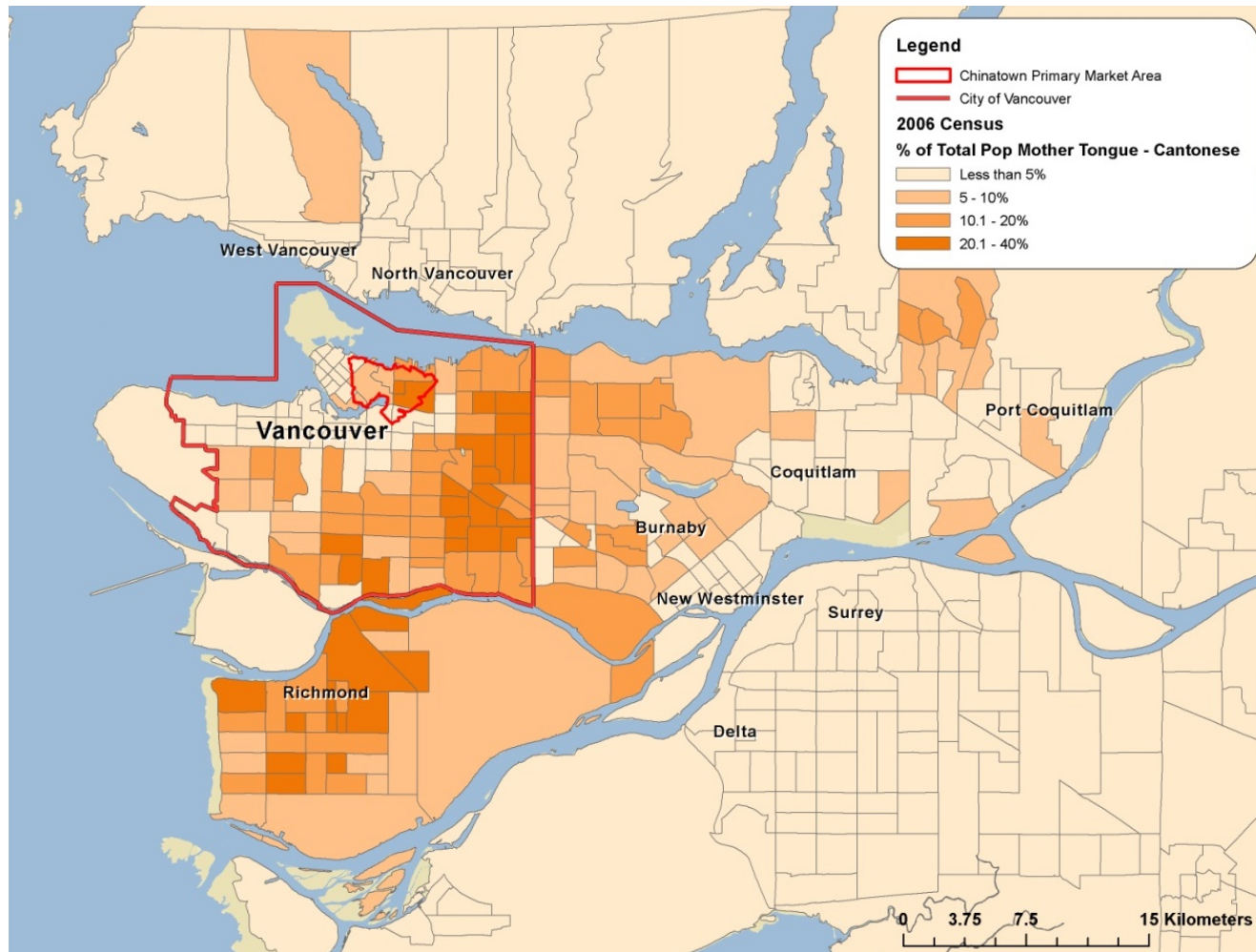
Source: Statistics Canada, 2006 Census

Figure A-4: Median Family Income



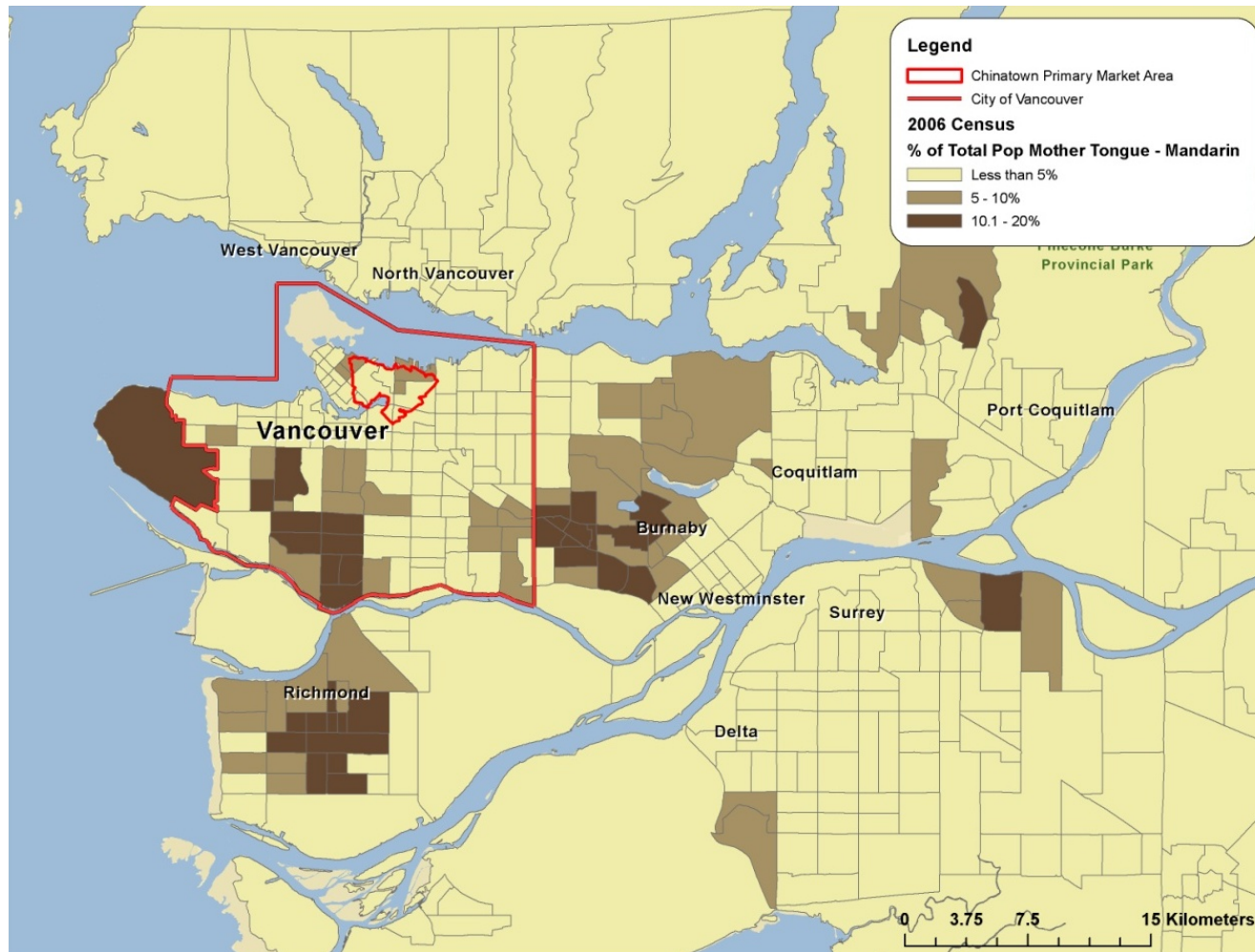
Source: Statistics Canada, 2006 Census

Figure A-5: Concentration of Cantonese Mother Tongue Population



Source: Statistics Canada, 2006 Census

Figure VII-6: Concentration of Mandarin Mother Tongue Population



Source: Statistics

Canada, 2006 Census

VIII. General Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of AECOM and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by AECOM from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of September, 2011 and AECOM has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by AECOM that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "AECOM" or "Economics Research Associates" in any manner without first obtaining the prior written consent of AECOM. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of AECOM. Further, AECOM has served solely in the capacity of consultant and has not rendered any expert opinions. This report is not to be used in conjunction with any public or private offering of securities, debt, equity, or other similar purpose where it may be relied upon to any degree by any person other than the client, nor is any third party entitled to rely upon this report, without first obtaining the prior written consent of AECOM. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from AECOM. Any changes made to the study, or any use of the study not specifically prescribed under agreement between the parties or otherwise expressly approved by AECOM, shall be at the sole risk of the party making such changes or adopting such use.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.