

From: **"Mochrie, Paul"**

To: **"Direct to Mayor and Council - DL"**

Date: 2024-05-16 5:38:25 PM

Subject: Memo to Mayor & Council - Cambie Corridor Commercial Demand Study

Attachments: Memo to Mayor & Council - Council Memo - Cambie Corridor Commercial Demand Study 2024.pdf

Dear Mayor and Council,

Please see the attached memorandum from Josh White on a Cambie Corridor commercial demand study which was completed in early 2024.

The key takeaways from this memo are:

- Following Council questions, staff commissioned a commercial demand study in the Cambie Corridor Plan area, specifically, between King Edward Avenue and West 41st Avenue.
- The study indicates that projected population growth and associated spending in the area in the next 20+ years will be sufficient to support one or more neighbourhood-oriented retail nodes in this section of the Cambie Corridor.
- It is anticipated that upcoming TOA rezoning policy, including proposed requirements for at-grade retail uses, could provide future commercial space in excess of those noted in the commercial demand study, and would therefore be sufficient to fill the retail gap identified under existing policy.

If you have any questions, please follow up with Josh White at josh.white@vancouver.ca.

Best,
Paul

Paul Mochrie (he/him)
City Manager
City of Vancouver



The City of Vancouver acknowledges that it is situated on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and səlilwətał (Tsleil-Waututh) Nations.

MEMORANDUM

May 16, 2024

TO: Mayor and Council

CC: Paul Mochrie, City Manager
Armin Amrolia, Deputy City Manager
Karen Levitt, Deputy City Manager
Sandra Singh, Deputy City Manager
Katrina Leckovic, City Clerk
Maria Pontikis, Chief Communications Officer, CEC
Teresa Jong, Administration Services Manager, City Manager's Office
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Trevor Ford, Chief of Staff, Mayor's Office

FROM: Josh White
General Manager, Planning, Urban Design and Sustainability

SUBJECT: Cambie Corridor Commercial Demand Study

RTS #: N/A

Introduction

This memo responds to previous questions from Council concerning potential opportunities for additional commercial space in proximity to King Edward Station on Cambie Street, and subsequent direction to undertake a commercial demand study for the area. It provides Mayor and Council with a summary of findings from the study and introduces how upcoming TOA policy will address concerns related to the provision of at-grade commercial close to station areas.

Background

Staff facilitated a commercial demand study for the northern section of the Cambie Corridor between King Edward Avenue and West 41st Avenue (see map in Appendix A). The study was undertaken to understand the market demand for ground-floor retail uses along this section of the corridor over the next 20+ years.

The methodology took into consideration anticipated growth in the surrounding area, and the planned commercial space at retail nodes nearby over the next 10 or more years. This included the doubling of retail space at the new Oakridge Centre (Oakridge Park), and the emerging neighbourhood retail nodes at the Heather Lands, the Oakridge Transit Centre, and Little

Mountain. The study presented floor space projections for the study area up to the year 2050, recommended three future potential retail nodes (see map in Appendix B), and ranked the viability of each node.

Conclusion(s) of Commercial Demand Study

The modelling indicated that projected population growth (and associated spending) will be sufficient to support one or more additional neighbourhood-oriented retail nodes along this section of the Cambie Corridor. The extent of floor area supportable will be dependent on both location and number of nodes. The total additional supportable floor area ranges from 35,000 sq. ft. up to 83,000 sq. ft., depending on the number of new retail nodes and their respective locations. Of the three nodes proposed, the most resilient/robust node is located on the southern end of the study area, essentially emerging as a northern extension of the existing retail on both sides of Cambie Street (around West 38th Avenue). However, if the intent is to provide additional commercial space in areas with limited existing or planned retail services, then the node at the northern end of the study area (around Cambie Street and West 27th Avenue) would likely be the most appropriate location (see complete study in Appendix C).

Staff note that the commercial demand study was undertaken prior to the recent provincial legislative announcements, including *Bill 47 – Housing Statutes (Transit-Oriented Areas) Amendment Act, 2023*. As part of that legislation, King Edward Station has been designated as a transit-oriented area (TOA), which will allow for more height and density than envisioned in the *Cambie Corridor Plan*. This change in the land use framework will result in a greater number of housing units and people in the area in the future, generating further demand for retail space.

Staff plan to report back to Council on the provincial legislation for TOAs in June, including a TOA designation by-law and a rezoning policy. The rezoning policy, if approved, will inform many aspects of future rezoning enquiries and applications in TOAs, including requirements for at-grade retail uses. It is anticipated that these proposed at-grade requirements could provide future commercial space in excess of those noted in the commercial demand study and would therefore be sufficient to fill the retail gap under existing policy.

Please direct any questions to josh.white@vancouver.ca.



Josh White
General Manager, Planning, Urban Design and Sustainability

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Appendix A - Commercial Demand Study Area Map

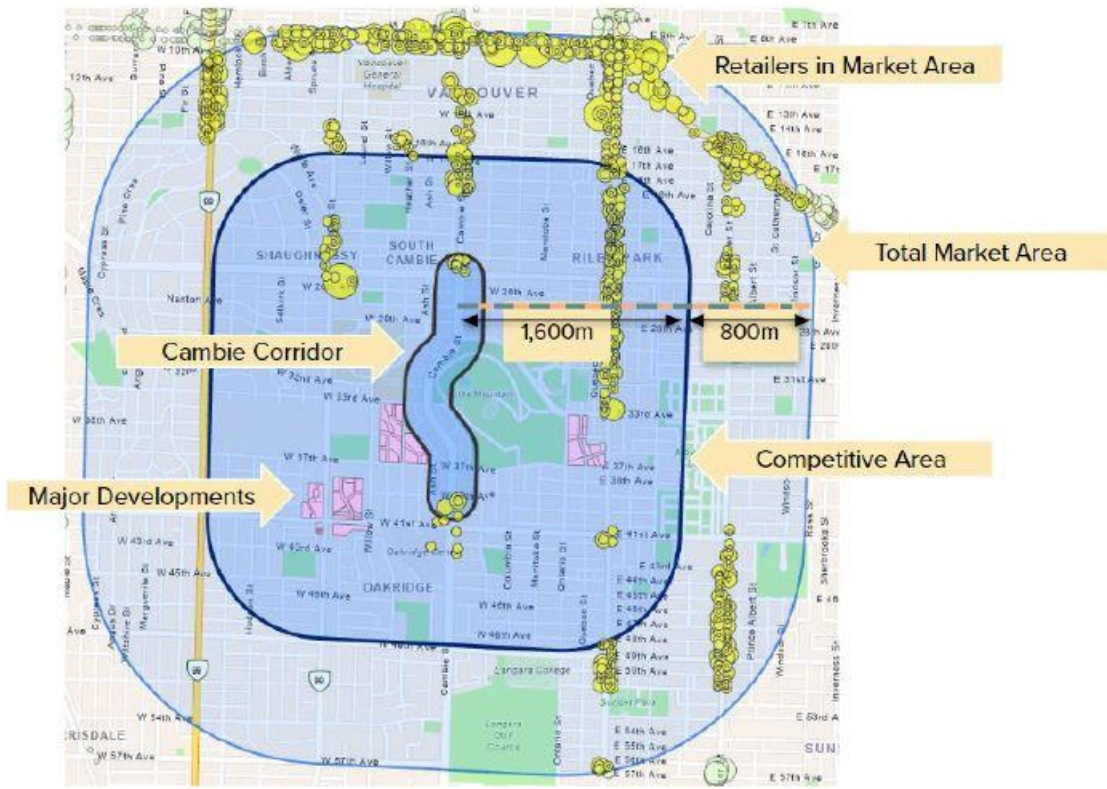


Figure 1 above details the concentric rings used to define the Study Area which is comprised of various nested components, notably: The Cambie Corridor itself which is the primary unit of analysis, the competitive area which comprises the residences which will supply spending dollars to both the Cambie corridor and other retailers outside of this area (the Total Market Area).

Appendix B – Potential Retail Nodes Map



CITY OF VANCOUVER

RETAIL MARKET STUDY

CAMBIE
CORRIDOR,
VANCOUVER

February 23, 2024

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1.0 INTRODUCTION

1.1 PROJECT OVERVIEW

Urban Systems (USL), in association with Licker Geospatial Consulting (LGEO), have undertaken a commercial demand study for the Cambie Street Corridor between West King Edward Avenue and West 41st Avenue (the “Study Area”). The City is interested in understanding whether there is any market opportunity to warrant consideration of ground-floor retail uses along the corridor within the next 20+ years, given the anticipated growth trajectory of the surrounding area, and the planned competitive commercial space at other retail nodes nearby. This study presents retail opportunity projections for the corridor overall, and for specific sub-areas along the corridor, the latter varying depending on how many sub-areas are open for consideration. Projections are all prepared for the year 2050.

The key components of this project included:

- Reviewing Storefronts database from City of Vancouver (current inventory)
- Reviewing and analysing retail components for major planned developments within the immediate market area of Cambie corridor (future development)
- Building and running a gravity-based retail demand model that is responsive to modeled pedestrian shopping behaviours, population and competitive retail locations
- Projecting incremental floor area demand using the gravity model, and identifying where within the corridor commercial floor area may emerge
- Providing additional commentary on other considerations for retail sub-areas within the study area.

1.2 RETAIL / SERVICE COMMERCIAL CATEGORIES

For this study, Statistics Canada household spending data by category has been grouped / clustered into **20 retail merchandise categories**, which are then ‘rolled up’ into 5 major category clusters. In addition, there is a ‘service commercial’ category which encompasses all health, financial, personal, and professional services. Unlike with retail, household spending data is often a less useful predictor or indicator of need for these types of spaces (e.g., health spending does not equate to the need for a medical clinic or physiotherapist). Service commercial needs are therefore projected on the basis of target ratios between service commercial and retail merchandise.

The categories and category clusters used in this report are outlined in the table below.

Table 1: Retail and Service Classification Schema

CATEGORY CLUSTER	WHAT IS INCLUDED?
Convenience Goods	Supermarket and grocery stores; specialty foods (bakery, fish market, meat market, other specialty foods), convenience stores, liquor stores, pharmacies and drug stores, florists.
Comparison Goods	Furniture and home furnishings; Electronics and appliances; Hobbies, Toys, Games and Books; Sporting Goods, Clothing, shoes, accessories (incl. jewelry and luggage), Hardware and garden stores; Pet and pet supply stores; Musical instruments and supply stores; Office supplies; Other (department stores, dollar stores, other general merchandise stores).
Food & Beverage Services	Full-service restaurants (including pubs); Limited service restaurants (including cafes and fast food).
Automotive goods & Services	Tires, parts and accessories.
Entertainment & Recreation	Fitness, yoga, martial arts and theatres.
Service Commercial	Personal services; Professional services; Health services; Financial services.

2.0 APPROACH

A detailed demand modelling exercise was undertaken to project the future demand for retail floor area, by category, for the Study area (i.e. Cambie Corridor between King Edward and 41st) and for larger surround market area as a whole by 2050. This section provides discussion on the mechanics of this modelling exercise. This is followed by presentation of final outputs (incremental floor area by category, by area) in Section 3.0.

2.1 DATA

The following data sources were considered for the modeling aspects of this project. It should be noted that in most cases information was processed with an eye towards completeness and accuracy, however given constraints of budget and time this goal was not achievable in some cases.¹

2.1.1 DATA FROM CITY OF VANCOUVER

- Municipal major development projects in the Study Area. This consists of all anticipated high likelihood projects that will be built out by 2050.
- Population forecast pursuant to the Vancouver Plan under a high growth scenario.
- Updated storefront inventory - all storefronts inventory information that the City had available. This did not include retail within the plan area, or many of the other areas in the vicinity. For this, new retail inventories were prepared (see below).
- Current and historical BC Assessment building information as well as land valuations and tax data - The City provided parcel-related data that was used to understand relative developability of certain parcels in the Study Area which guided efforts for land use recommendations.
- Traffic analysis zones and forecast population and employment by traffic zone for areas external to the study area.

2.1.2 DATA FROM CONSULTING TEAM

- Accessibility modeling information for all parcels both within and proximal to the Study Area (LGeo-2023). This information was generated using a walking network developed for previous access analysis studies completed for the City (Namely: City-wide access to retail clusters which was a planning element for the Vancouver Plan). Care was taken to ensure that parcel accessibility was correctly captured in the data (as this is a critical driver of the market capture modeling).
- Population / dwelling demand forecasts - In addition to the City-supplied data, the LGeo team used custom information generated in a previous study that delineates certain parcels that may benefit from increased density and a change in typology from low density residential to

¹ Note this forecast does not consider the effects of Bill 44 and Bill 47, which may have substantial impacts on some of the traditional single detached areas immediately west of Cambie Street.

more mixed uses². This data was used to inform assumptions with regards to parcel turnover in the commercial nodes.

- Typical retail performance metrics by category, per historical data from ICSC and information obtained by Urban Systems from other sources - this is the typical required performance of major retail categories in terms of sales per square foot per annum (\$/sq.ft./ annum). This data, in conjunction with calculated \$/sq.ft. information for retail nodes (discussed below) was used to convert projected spending into supportable floor area, and to determine the extent of incremental floor area supportable by sub-area.

2.1.3 DATA FROM THIRD PARTIES

- Trip diary data from Translink / Metro Vancouver Regional District. The team reviewed travel behaviour data from the most recent Translink trip diary (2017)³ which delineated average trip distances and modes to shopping activities (that is to say how far a resident of Vancouver will travel for shopping generally). These data inputs were used to construct the fundamental calculator in the gravity model which assigns spending dollars to retailers based on distances reflected in the trip diary survey.
- Spending information by retailing category from Environics (2023). Derived from aggregated credit card statements, this spending data was used as a key input into the gravity model to indicate how much households in the Study Area and outside the study area spent on goods and services related to retail. While the Environics method for developing this data is proprietary, we recognize that it is a trusted and widely used source of information that is functional for this study.

2.2 METHODS AND ASSUMPTIONS

Presented below are the sequence of methods and assumptions used in this project to generate the modelling. Where possible, and recognizing that this is an overview of the work as opposed to a deep dive into the modelling engine assumptions, necessary details have been included, including figures, tables and equations as appropriate.

2.2.1 OVERALL APPROACH

This model attempts to capture reasonable current and future spending behaviours based on best available data and the theory that consumers spend dollars on day-to-day ('convenience') goods and services based primarily on access. Additionally, consumers typically access more than one store per retailing class. Each store competes for dollars based on: (1) how close they are to a customer; (2) how big they are; and (3) how well they provide a consumer experience.

² This information was generated as part of the Vancouver Plan planning effort which required a future land use scenario for evaluation purposes. This future scenario has been used in subsequent efforts, notably annual review of the Climate Emergency Action Plan, a municipal grid capacity study as well as planning for Healthy Waters 2075. The future scenario is constantly being adjusted to reflect evolving municipal and provincial planning contexts.

³ Note recent trip diary student is currently unavailable. However, once that information is processed and disseminated, modeling assumptions should be updated for this study.

Our modelling directly addresses the first two points (proximity and size), and considers the third deterministically (i.e., if a business is still running a storefront operation at time of inventory, they are providing a good experience). The overall availability of resident spending potential is driven by demographics and location. Finally, to account for population change, it is assumed that as an area densifies, more consumers with similar spending habits will access the same number of stores which results in incremental demand.

2.2.2 CREATION OF A FUNCTIONING DATABASE OF EXISTING RETAILERS

For this step our team classified and confirmed retailers / service commercial businesses in the competitive market area to Cambie Corridor. For this effort the Vancouver storefronts data was considered as the prime source of relevant data and information, and it was validated through spot checks against BC Assessment data.

To classify the storefronts data into a list of businesses that could be used for gravity modelling, the team deployed a classification schema similar to what was executed for the Rupert Renfrew analysis which grouped all businesses into the categories presented in Table 2 below.

For categories where household spending is typically a good indicator of floor area demand (i.e., where spending can readily be translated to floor area through standard performance metrics), spending in associated Environics categories were 'mapped' to that category. For categories where household spending may not readily translate to floor area need or where information for categories is not available (as with most service commercial categories), a 'gross-up' factor was used, which ties combined service commercial floor area to incremental projected retail floor area need.

Table 2: Retail Categories and Descriptions

CATEGORY	DESCRIPTION	INCLUDED IN GRAVITY MODEL?	NOTES
Automotive Goods & Services	Car-oriented storefronts and services	Yes	
Clothing, Shoes, Accessories	Includes children's and adult clothing stores, shoes, accessories	Yes	
Convenience Stores	Convenience stores receive a fraction of Environics' 'food purchased from stores' spend category	Yes	
Electronics & Appliances	Household electronics as well as home appliances such as stoves and dishwashers	Yes	
Entertainment & Recreation	Spending on recreation services such as fitness centres	Yes	
Full-Service Restaurants	Sit-down restaurant with servers, including licensed establishments	Yes	
Furniture and Home Furnishings	Furniture for indoor and outdoor. Other household furnishings	Yes	

	(curtains, mirrors, picture frames) art, antiques, decorative wares		
Hardware and Garden Stores	Other household equipment, nurseries, hardware, garden supplies, maintenance, and repairs of old furnishings and equipment	Yes	
Hobbies, Toys, Games, Books	Children’s toys and outdoor play equipment and accessories, books and pamphlets (excluding schoolbooks), video games and accessories (excluding computers)	Yes	
Limited-Service Restaurants	Quick-service restaurants or cafes (e.g., fast food, coffee shops)	Yes	
Liquor Stores	Liquor stores	Yes	
Musical Instruments and Supplies	Musical instruments, parts and accessories	Yes	
Office Supplies and Stationery Stores	School supplies, stationery	Yes	
Personal Services	Personal care services, including laundry / dry cleaning, rental, tailoring, alteration, salons, and other services	No	Spending habits do not necessarily conform to gravity for all subclasses of this category.
Pet and Pet supplies	Purchase of pets and related pet goods, foods	Yes	
Pharmacy / Drug stores	Personal care products, prescriptions, medicines	Yes	
Professional Services	Lawyers, accountants, financial services, real estate services, insurance, other professional services	No	No spending model could be created to capture the location considerations of this highly heterogeneous sector.
Specialty Foods	Meat markets, fish /seafood, bakeries, chocolateries, other specialty foods	Yes	
Sporting Goods Stores	Sports and athletic equipment, supplies, and parts for rec equipment, outdoor play	Yes	
Supermarket / Grocer	Supermarkets and other grocery (except convenience) stores. Fruit and veggie markets	Yes	

2.2.3 POPULATION GROWTH IN THE CORRIDOR:

To develop a reasonable forecast of population growth for the corridor, our team used population projections developed for the Vancouver Plan land use scenario along with assumed population forecasts from the major projects in the area. The informational basis for all household totals for both

2022 and 2050 was parcel-based population and household estimates which were derived from BC Assessment data. These estimates were aggregated to the block level which is a reasonable scale to estimate the effects of local serving retail (i.e. the modelling was completed at 800-1,600 metre scales).

Household totals for 2022 were sourced directly from BC Assessment unit counts and aligned with Census data, as appropriate. Household totals for 2050 were determined by interpolating population growth between 2022 and 2050 projections at the traffic analysis zone scale. To disaggregate the projected 2050 household totals for areas inside the City, the team used the outputs from a model constructed for the Vancouver Plan City-wide planning effort which distributes anticipated population growth based on the underlying characteristics of parcels with considerations for redevelopment potential and other related urban dynamics (such as infilling, secondary suiting, Vancouver Plan policy for allowing house plexes etc.). Generally, for this project our team used proposed Vancouver Plan growth zones to disaggregate population wherein areas permitting higher allowable FSRs received more population than lower density areas.

In the initial conceptualization of this project, in addition to generalised population projections, the project team considered developing stratified demographic forecasts that could be used to influence the spending aspects of the model. However, based on best available spending data, the household unit was deemed the most reliable predictor of spending at a localised scale.

Pursuant to Figure 1 below we note the likely market in the area for both the 2022 baseline and the 2050 projection. Of note is the corridor itself which is expected to increase in size to approximately 3,900 households by 2050 (up from 1,800 in 2022) and the various concentric zones surrounding the study area which reflect the competitive market area (ie resident spending in the area) and the total market area which represents the universe of competitive retailers seeking to capture that market. **The likely market for any potential business in the study area will be approximately 42,000 households in 2050** which is nearly 2.5 times the current market of 18,000 households. To some extent, this increase in market potential will be satisfied by new retail nodes located in major developments in the area (discussed in the section below) as well as by existing local serving retail areas, notably Cambie Village, Main Street and soon the returned grocery store (plus new food hall) at the reimaged Oakridge Mall (now Oakridge Park).

Figure 1: Cambie Corridor Market Area

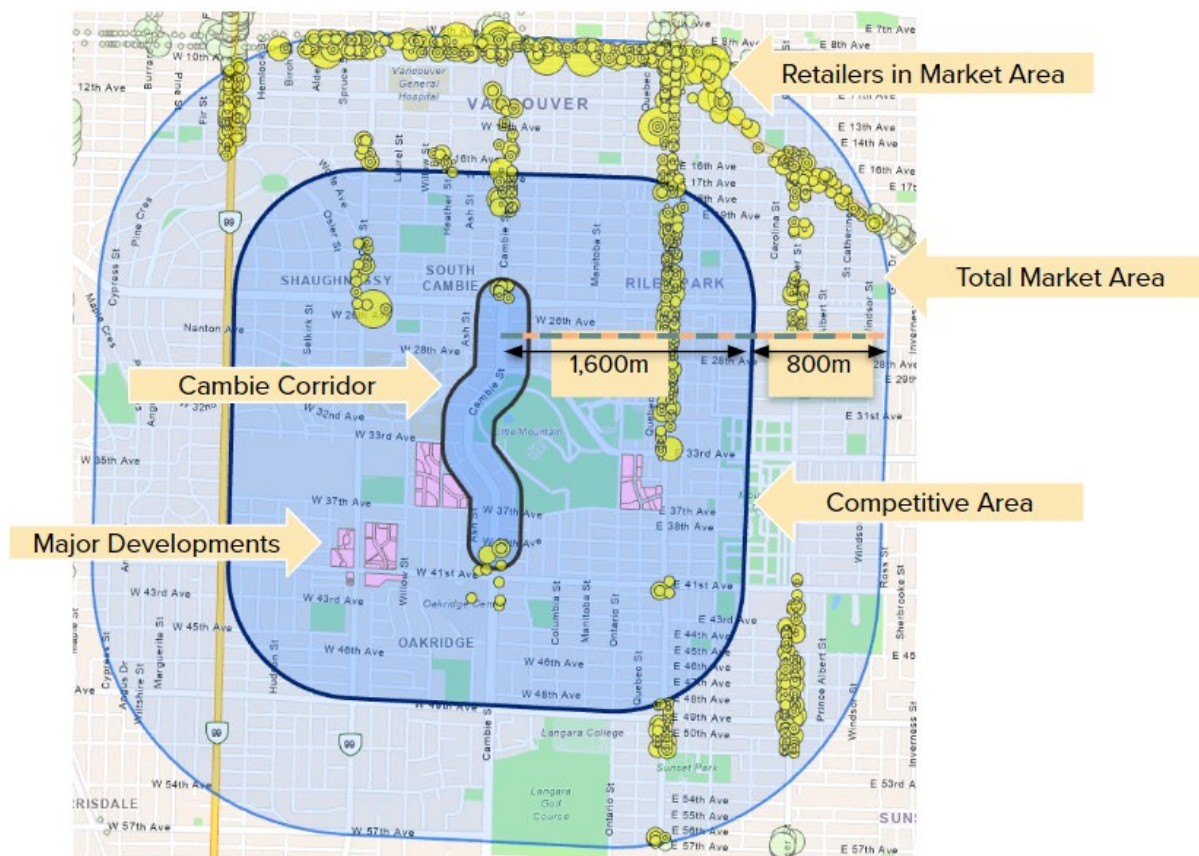


Figure 1 above details the concentric rings used to define the Study Area which is comprised of various nested components, notably: The Cambie Corridor itself which is the primary unit of analysis, the competitive area which comprises the residences which will supply spending dollars to both the Cambie corridor and other retailers outside of this area (the Total Market Area).

Table 3: Current and Future Households in Market Area

	# OF HOUSEHOLDS IN CONENTRIC RING	
	2022	2050
Corridor	1,826	3,887
Competitive Area	16,069	38,304
Total Market Area	31,087	54,618

2.2.4 FUTURE RETAIL GROWTH NODES

Projecting future opportunity for retail in the Cambie corridor requires a projection of the future competitive environment. Based on available information at the time of writing, the bulk of incremental competitive retail space beyond that which exists today will be located at 5 nodes, outlined in Table 4 below. Of these five nodes, the Oakridge Centre redevelopment is by far the most significant in terms of

total commercial floor area under construction.⁴ The consulting team has developed speculative build-out tenant mixes for each node based on a combination of current leasing plans (where they exist), previous retail market studies (where accessible), and inference based on our combined knowledge of similar nodes elsewhere in the City. These speculative tenant mixes are presented in the table below. Note that for Oakridge Park (i.e., Oakridge Centre), only competitively relevant categories have been captured. Additional details on each of these nodes can be found in Appendix A.

Table 4: Future Retail Nodes – Speculative General Convenience Retail / Service Tenant Mix*

RETAIL CATEGORIES	FUTURE RETAIL GROWTH NODE					
	Heather Lands	Little Mountain	JCC	Oakridge Park (local serving only)	Oakridge Transit Centre (OTC)	GRAND TOTAL
Full-Service Restaurant	3,000	2,500		30,000		35,500
Limited-Service Restaurant	3,000	2,500	5,000	45,000	6,000	61,500
Liquor Store	3,000	2,000			1,500	6,500
Personal Services	5,000	3,000		15,000	3,500	26,500
Pharmacy	5,000	3,500		5,000	1,500	15,000
Professional Services		2,000				2,000
Specialty Foods		1,500				1,500
Sporting Goods	3,000		1,500			4,500
Supermarket / Grocery	35,000	4,500		45,000	10,000	94,500
GRAND TOTAL	57,000	20,500	10,000	140,000	22,500	250,000

*All figures in square feet

2.2.5 MARKET CAPTURE ASSUMPTION

As the intent of this project was to establish what is the potential market for **local serving** retail, our team simplified the gravity model down to a singular mode of travel (walking) with a lowered distance threshold (800 to 1,200m) to reflect the more granular nature of these types of shopping trips. To this end, we set out to construct a pedestrian-oriented market capture model that reflected observed travel behaviours. To inform this we used trip diary information from the Translink 2017 trip diary which suggests that in Vancouver 20% of shopping/dining trips will occur by foot, while the balance will occur via transit or driving.

However, the 20% value determined above reflects a City-wide average which was likely biased to denser areas of the community and may not reflect mode choice in the Cambie Corridor itself. Therefore, we used additional modeled travel behaviours from the City's VanSAM (Vancouver Sub Area Model) travel model which suggests a significantly weaker pedestrian mode share for all trips⁵ in the

⁴ Only convenience retail and service commercial uses are considered from a competitiveness standpoint. While the new Oakridge Park (formerly Oakridge Centre) will contain more than twice the total commercial floor area of its previous iteration, much of this will be dedicated to comparison goods categories that are not competitively relevant for convenience retail and service nodes geared to fulfilling day-to-day shopping, dining and gathering needs of local residents.

⁵ Our extract of the VanSAM model does not discriminate shopping trip purposes whereas the Translink model does.

corridor as compared to the municipal average⁶. Benchmarking the Cambie Corridor mode share to the municipal average (64%) and multiplying it against the Translink pedestrian shopping/dining trip value (20%) suggests that **12.8% of shopping/dining trips will occur by foot in 2022.**

By 2050, municipally, mode shares are expected to trend upwards to 40% of trips by foot which potentially doubles the 12.8% value to 25.6% which was the final spending multiplier retained in the modelling. Spending estimates were therefore determined by evaluating the competitive landscape within 800 or 1,200 of a given block by determining the distance to potential retailers within that distance and distributing 25.6% of the anticipated household spend proportionately based on proximity of the block to retailers.⁷

2.2.6 TREATMENT OF SERVICE COMMERCIAL SPACE

While spending data is available for some service commercial categories, we do not explicitly look at service commercial space as part of the gravity modelling exercise. Rather, opportunity / demand for space to accommodate service commercial providers (e.g., personal service, health, education, recreation etc.) is determined using a 'gross-up' factor atop the supportable retail floor area that is calculated through the gravity modelling. The selected gross-up factor is based on typical retail / service commercial mixes observed in comparable local-serving retail areas. This typically ranges from 15% to 30% within local-serving retail areas in Vancouver. Service commercial spaces are often (but not always) a more significant part of overall tenant mix in smaller nodes. We apply a **gross-up factor of 25%** on projected retail floor area support to account for floor space dedicated to service commercial tenants in the Cambie Corridor.

⁶ Specifically, 36% percent less than the municipal average as in 2019, 17.1% trips by all modes in the Cambie Corridor occur by foot compared to a municipal average of 26.7%

⁷ For instance, a block with 100 residents spending \$1,000 per year on quick service foods would spend \$25,600 (100,000 * 0.256) annually at potential retailers within a 1,200 metre radius. If two retailers were located at 400 and 800 metres respectively, 66% of the spending would be allocated to the retailer at 400m, and 33% would be allocated to the retailer at 800m.

3.0 ANALYSIS AND DISCUSSION

3.1 SPENDING AND CATEGORY FILTERING

Results from the gravity modelling exercise discussed in the Methods section previously, guided by the core assumptions and guiding parameters outlined above, suggest that up to **\$120 million in combined retail and service commercial expenditures** could, in theory, be captured within the study area by 2050. This figure will vary however, depending on which retail nodes along the corridor are 'open' for consideration (individual mode maximums range from \$52m - \$86m). We come back to this topic in the section to follow. Regardless of total expenditure potential, this spending encompasses all retail categories. However, we know that some of this spending is unlikely to materialize within the corridor because not all retail categories will be present to capture those dollars. Some retail categories, particularly those falling under the 'comparison retail' umbrella, are unlikely to be attracted to the Cambie corridor in the future, even under a supportive land use policy framework, for a variety of reasons, including:

- **Typical store size thresholds:** many comparison goods retailers, such as those selling electronics, household furnishings/ furniture, musical instruments, sporting goods etc., will typically require larger amounts of space for product display and inventory. This may not align with the configuration or extent of contiguous floor areas available in a neighbourhood retail area;
- **Storage / Receiving / Unloading:** large comparison goods retailers will typically need to be located and configured to allow adequate space for delivery vehicles, loading docks, and storage.
- **Foot traffic and visibility:** many comparison goods retailers require high foot traffic and high visibility, which may not be possible within the context of a neighbourhood retail node.
- **Agglomeration effects:** many comparison goods retailers look for opportunities to co-locate spatially to draw customers and benefit from greater foot traffic, visibility, and in some cases shared costs of marketing. This is unlikely to be possible in this context. This unlikelihood is increased by the proximity of this retail area to what will be one of the region's largest comparison goods retail agglomerations at the new Oakridge Park development.

Given the above, we have removed the following retail categories from consideration for this modelling:

- Electronics and Appliance stores
- Furniture and Home Furnishings Stores
- Clothing, Shoes and Accessories Stores
- Hobbies, Toys, Games, and Books Stores
- Automotive Goods & Services
- Sporting Goods Stores
- Musical Instruments and Supplies Stores
- Office Supplies and Stationery Stores
- Entertainment and Recreation establishments

The categories that remain for consideration are:

- Supermarket / Grocery Stores
- Specialty Foods Stores
- Convenience Stores
- Full service and limited service restaurants
- Pet / Pet supply stores
- Hardware stores (small-scale)
- Pharmacy / Health Stores
- Liquor stores
- Service commercial (personal, professional, financial, health)

This latter list of categories is considered the retail 'universe' for Cambie corridor for the balance of this report. All reporting of total supportable floor space in sections below refers only to the categories open to consideration in the Cambie corridor.

3.2 EXPENDITURE POTENTIAL AND MARKET SUPPORTABLE FLOOR AREA

A parcel-level review of the study area was conducted using GIS, to identify where along the Cambie corridor retail space could emerge. The working assumption for this review was that any future retail space in the corridor would need to have frontage along Cambie Street or West 33rd Avenue. The analysis revealed that the majority of parcels along Cambie Street between West King Edward Avenue and West 39th Avenue either (a) have recently redeveloped, or (b) have development permits in place. This leaves three possible nodes along the corridor that could accommodate future ground-floor retail space with Cambie Street frontage. These are:

- **Node 1: Cambie Street between W. 26th and W 28th Avenue (west and east)⁸**
- **Node 2: Cambie Street at W. 31st-32nd Avenue (west side) + West 33rd Ave west of Cambie**
- **Node 3: Cambie Street between W. 37th and W. 39th Avenues**

When each node is open for consideration as a possible recipient of future retail spending, and with a focus only on applicable retail categories as outlined previously, modelling projections indicate that the total combined supportable floor area ranges from **35,000 up to 83,000 square feet**. This range is driven by both the placement of the respective retail node(s) along the corridor vis-a-vis competitive retail locations (current and future), and the number of nodes that are available for retail placement.

For example, consider the market supportable floor area at **Node 1** under the following scenarios:

Single Node: if only Node 1 is considered for future retail, the projected supportable floor area by 2050 is approximately 35,000 square feet.

Bi-Nodal: if two of three nodes are considered as possible retail locations, then supportable floor area at Node 1 drops to around 29,000 square feet, and the combined market support for two nodes is between 62,000 and 64,000 square feet.

⁸ Note that the eastern side only has parcels available between W. 27th Ave and W. 28th Ave.

Tri-Nodal: if all three nodes are considered possible locations for future retail, then supportable floor space at Node 1 drops further to just under 26,000 square feet, and the combined supportable floor space across all three nodes is just around 83,000 square feet.

Amongst the three identified nodes along the Cambie Corridor, Node 3 appears to be the most market resilient; this is attributable to the projected size of the immediate trade area surrounding it by 2050. Whether we consider a single node, bi-nodal or tri-nodal situation, the supportable space at node 3 does not vary significantly (from a low of 32,500 to a high of about 42,300 sq.ft.). By contrast, Node 2 shows the most variability in supportable floor space, meaning it is the most vulnerable to sales cannibalization from the other two nodes. Under an 'all nodes' (tri-nodal) scenario, Node 2 supports around 25,500 square feet. Under a 'Node 2 only' scenario, that figure jumps to 41,500 square feet. Under a "bi-nodal" scenario of nodes 1 and 2, Node 2 shows support for nearly 33,000 square feet.

Regardless of whether the future of the corridor considers one, two or three nodes, each of the three appears to have sufficient future market support to emerge as a viable offering given the projected floor area demand in each major category or category cluster. Viability depends on other factors too, however, which are addressed below.

Figure 2: Cambie Corridor Potential Retail Nodes (blue parcels)



Table 5: Supportable Floor Space (sq.ft.) by Category, Varied by Number of Nodes Considered

Category	TRI-NODAL			BI-NODAL			SINGLE NODE		
	Node 1	Node 2	Node 3	Node 1	Node 2	Node 3	Node 1	Node 2	Node 3
Grocery / Convenience	12,000	10,400	12,800	13,300	13,100	13,700	15,500	16,300	16,400
Restaurant	2,100	3,100	3,200	2,200	3,400	3,400	2,400	3,700	3,700
Hardware	4,600	5,100	8,300	5,700	7,700	9,000	7,700	10,900	11,800
Pharmacy	1,000	1,000	1,100	1,100	1,200	1,100	1,200	1,300	1,300
Liquor	1,000	800	600	1,100	900	600	1,100	1,000	600
Service	5,200	5,100	6,500	5,800	6,600	7,000	7,000	8,300	8,500
TOTAL	25,900	25,500	32,500	29,200	32,900	34,800	34,900	41,500	42,300

3.3 PHYSICALLY ACHIEVABLE FLOOR AREA BY NODE

Based on the lot sizes in each node and an assumption that the retail component of future development would be built at between 0.25 and 0.5 FSR, the following amounts of ground-floor retail space could be *physically accommodated* at each node:

Table 6: Physically Achievable Floor Area by Node

NODE	RETAIL FLOOR AREA (SF) @ 0.35 FSR	RETAIL FLOOR AREA (SF) @ 0.50 FSR
Node 1	43,000	63,000
Node 2	28,000	40,000
Node 3	54,000	78,000
Total – All Nodes	125,000	180,000

The table below compares *minimum* physically achievable floor area to *maximum* floor area supportable by 2050, by node.

Table 7: Physically Achievable vs. Market Supportable Floor Areas by Node

NODE	MINIMUM PHYSICALLY ACHIEVABLE FLOOR AREA	MAXIMUM MARKET SUPPORTABLE FLOOR AREA (2050)	MAX MARKET AS % OF MIN ACHIEVABLE
Node 1	43,000	34,900	81%
Node 2	28,000	37,200	133%
Node 3	54,000	41,600	77%

Assuming that retail space is achieved at a minimum of 0.35 FSR, Nodes 1 and 3 are physically capable of accommodating the maximum projected market supportable floor space in 2050 under ‘single node’ conditions.

Node 2, inclusive of both Cambie and West 33rd frontages, has less capacity (at 0.35 FSR) than its maximum market supportable floor area. At 0.5 FSR it could accommodate the maximum projected market supportable floor area. If all three nodes were to proceed, the maximum market supportable floor area at Node 2 drops to 25,500, which is achievable at 0.35 FSR.

3.4 OTHER VIABILITY CONSIDERATIONS

Finally, we review each node through additional market lenses to determine if a given node would likely be viable if retail were permitted.

The modelling exercise described above accounts for market demand and competition (current and future), therefore we know that projected corridor trade area growth will create a sufficient customer base and spending potential to support local-serving retail / service commercial at all three nodes. The qualitative review presented below looks at each node through the additional lenses of access/visibility, contiguity, and anchoring potential. With regards to anchoring, within the context of a neighbourhood retail node, the typical anchor tenant would be a small grocer / specialty foods store (or stores), drug store, or convenience store. Without this anchor use, the viability and the broader node may be called into question.

Table 8: Other Nodal Viability Considerations

NODE	ACCESS / VISIBILITY	CONTIGUITY	ANCHORING POTENTIAL
1 - Cambie 26th-28th	Good - would be visible from Cambie, both northbound and southbound. Easily accessible by foot, bike or car. Bikeway located at W. 27th. Not visible from Cambie & King Edward intersection.	Moderate / Good - could create a contiguous 2 block retail area on west and 1-block on east,	Good - suggested support for 24,000 to 35,000 square feet, including 11,000 to 15,000 square feet of grocery / specialty foods / convenience and 900 to 1200 square feet of pharmacy.
2 - Cambie 31st / 32nd	Low / Moderate - only one block on west side of street; visibility would be limited from east side. Also located mid-point on corridor in the Cambie 'curve', limiting sightlines from south and north. Section along W. 33 rd would be separated from primary node.	Low / Moderate - offers contiguity along Cambie, but limited frontage, and only on one side of street. W.33 rd area would be separate from primary node.	Moderate - overall site capability, and segmenting of the node into two areas, limits the extent of the node. However, other nodes of similar size (in different contexts) have been shown to be viable. ⁹
3 - Cambie 37th-39th	Good / Excellent: Bikeway located at W.39th	Good / Excellent: approx. 400 feet of frontage potential on west side of street and 600 on east side, each continuing northward from existing retail / service commercial areas. In conjunction with new construction towards 41st and Oak, this node building out would create a double-loaded retail street of approximately 1,200 linear feet (365 linear metres)	Good / Excellent: suggested support for 34,00 to 42,000 square feet, including ~14,000 to ~16,000 square feet of grocery / specialty foods / convenience, 9,000 to 12,000 square feet of hardware, a pharmacy, and restaurant space.

⁹ An example of a small, relatively successful anchored node is the Choices-anchored strip on the south side of West 57th Avenue between West Boulevard and Angus Drive. This node of approximately 15,000 combined square feet is anchored by a sub-7,000 square foot Choices Market, complemented by 2 personal services businesses, one café, and one jewellery boutique. However, this node is located on a quieter, slower-moving street than Cambie, with ample on-site and street parking, and does not have visibility impeded by a curving street layout. Street parking on Cambie & 32nd is quite challenging by contrast, as fast-moving traffic has no line-of-sight around the corner of the road, causing a potentially hazardous situation for both motorists and would-be parallel parkers.

Overall, from a market viability standpoint, our viability and priority ranking is as follows:

Table 9: Cambie Corridor Node Viability Ranking

NODE	RANK
#3 – 38th & Cambie	First
#1 – 27th & Cambie	Second
#2 – 32nd & Cambie	Third

3.5 ALTERNATE APPROACHES

The above analysis focuses on parcels / nodes where retail could potentially emerge along the Cambie Street corridor between West King Edward and West 41st Avenue. There may be alternate or complementary approaches to delivering neighbourhood-serving retail and service commercial to the Cambie corridor in ways that are also aligned with other initiatives being undertaken or contemplated in Vancouver and elsewhere to accommodate and encourage “within neighbourhood” retail / gathering spaces. This may include: (1) retail frontages on side streets off Cambie, and (2) Laneway-fronting retail.

3.5.1 FRONTAGES OFF CAMBIE

There is growing interest in the City around the possible return and expansion of small-scale neighbourhood commercial nodes such as corner stores and cafes, embedded within the neighbourhood fabric off arterials. The City of Vancouver’s own research, based on a review of historical directories, license data and ground-truthing, has shown many deactivated commercial sites within neighbourhoods (mostly across the eastern parts of the City).¹⁰ While no comparable ‘legacy’ sites exist within the Cambie Street context, there may be opportunity for such nodes to emerge over the coming decades through off-corridor redevelopment and intensification.

Small-scale neighbourhood businesses will require City support in a variety of ways to reduce barriers to startup and lessen operational challenges. Some of these considerations were outlined in our earlier reporting for the Rupert Renfrew plan area, and include:

- Removing ‘grocery sale’ prioritization from neighbourhood grocery store classification, instead allowing flexibility to sell groceries and prepared foods in accordance with local market demand.
- Adding zoning permissions that will allow for more variety and flexibility of business models.
- Reducing permit wait times and streamlined permitting process.
- Ensuring high degrees of neighbourhood walkability.

¹⁰ See: www.shapeyourcity.ca/corner-stores/maps/corner-store-map

3.5.2 LANEWAY RETAIL

Laneways across the City have historically been used for more than simply car storage and waste pickup. Garages in lower density neighbourhoods have, for instance, long contained all manner of activities including active employment uses in the form of workshops, maker spaces, artist studios, professional offices, and artisanal manufacturing. With the rollout of laneway housing starting in 2009, additional laneway employment use opportunities were introduced through 'home occupations.' Zoning allows for a range of home-based businesses, provided they do not cause additional traffic / parking burden or other negative externalities. Building on this recent incremental expansion of laneway employment uses, there is an opportunity to explore further small-scale laneway-oriented employment through permissions for limited retail businesses.

Explorations around laneway retail opportunities and challenges are being advanced in other cities, including in the City of Toronto. Recent discussions between members of our team and the Toronto Strategic Initiatives and Policy Analysis group (a group embedded within the City Planning division) indicate that the City, in collaboration with private sector proponents, is intending to strike a task force related to neighbourhood and laneway retail in 2024, and as part of this, may seek to initiate a pilot project of expanded laneway retail permissions in select neighbourhoods over the coming years.

4.0 CONCLUSIONS

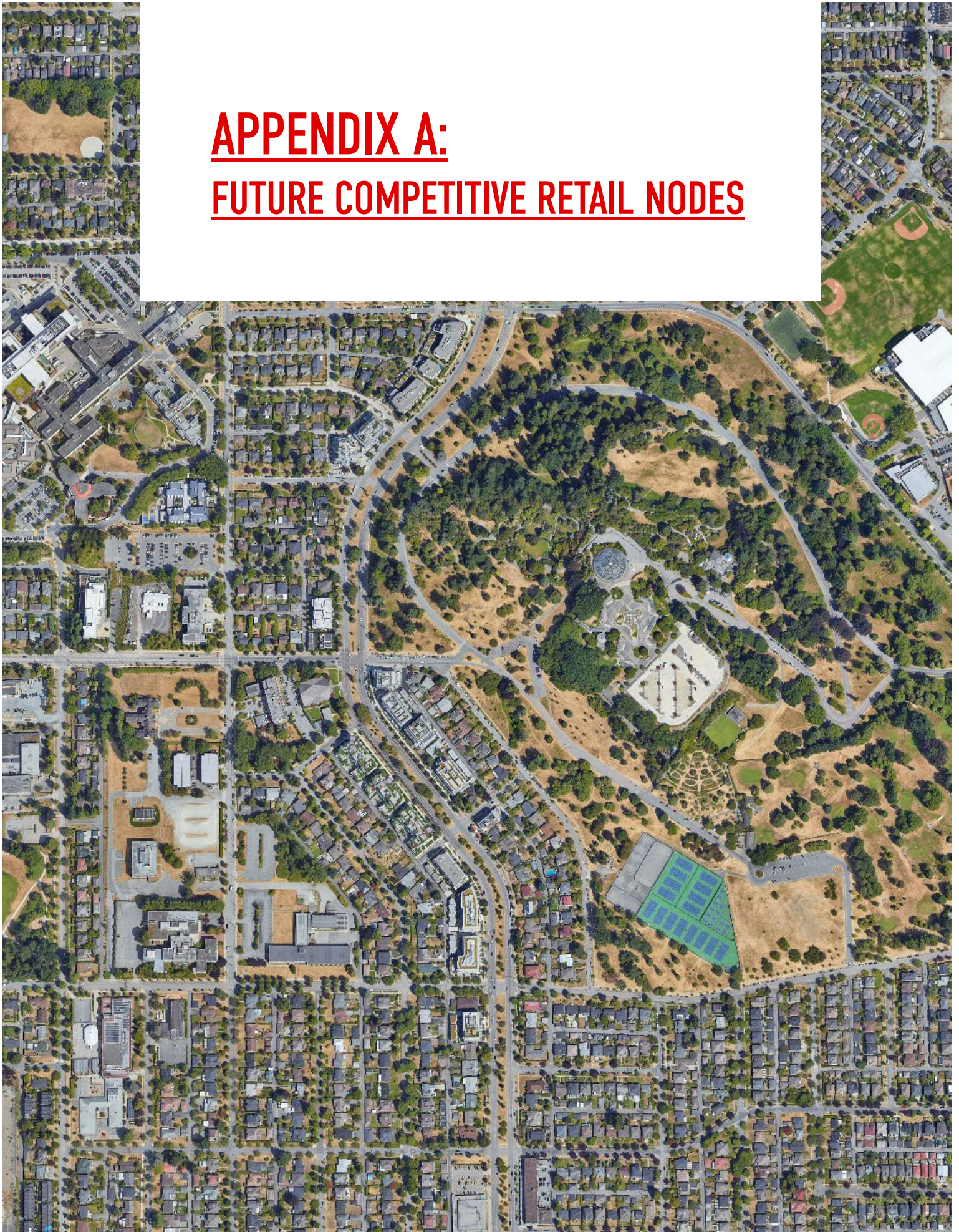
The extensive projected population growth within the Cambie corridor over the next 25 years will bring with it the opportunity to expand neighbourhood-oriented retail offerings in and around the corridor. When combined with expected further modal shift towards active transportation, along with a more general desire to create complete communities across the city, the importance of further neighbourhood retail in areas where it is currently absent becomes clearer.

There have been questions about whether retail could be supported along the Cambie corridor between West King Edward and West 41st given the extent of expected competition over the next 10+ years, including the doubling of retail space at the new Oakridge Centre (Oakridge Park) and the emergence of neighbourhood retail nodes at the Heather Lands, the Oakridge Transit Centre and Little Mountain. The gravity modelling exercise has indicated that the extent of projected population (and associated spending) growth by 2050 will be sufficient to support one or more additional neighbourhood-serving retail nodes along the Cambie corridor; the extent of floor area supportable will be dependent on both the location and number of nodes.

If all three of the proposed nodes outlined in this report were to be 'opened' for retail consideration up to 83,000 combined square feet may be supportable by 2050. If only one node were opened, that figure is approximately 35,000 square feet. Of three nodes proposed, the most resilient / robust node would be the one towards the south end of the study area, essentially emerging as a northern extension of existing retail on both sides of Cambie Street. However, if the intent is to plug the largest gap in terms of nearby neighbourhood retail services, then the node at the northern end (around Cambie and 27th) would likely be the most appropriate.

In addition to considerations of new retail space with frontage along Cambie Street, there will be opportunities to consider areas where 'in-neighbourhood' retail may be appropriate. This could come in the form of side-street retail, laneway retail, or both. Further exploration is required to determine where in the corridor these uses may be most likely to succeed.

APPENDIX A:
FUTURE COMPETITIVE RETAIL NODES



APPENDIX A: FUTURE COMPETITIVE RETAIL NODES

DEVELOPMENT 1

Little Mountain

<https://council.vancouver.ca/20160629/documents/pspc3.pdf>

FIGURES

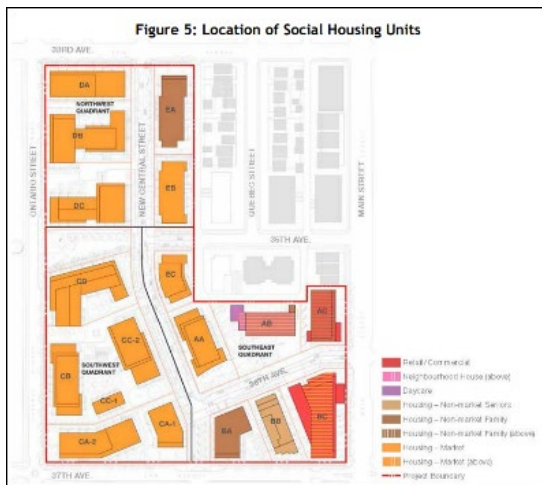


Table 2: Development Phasing

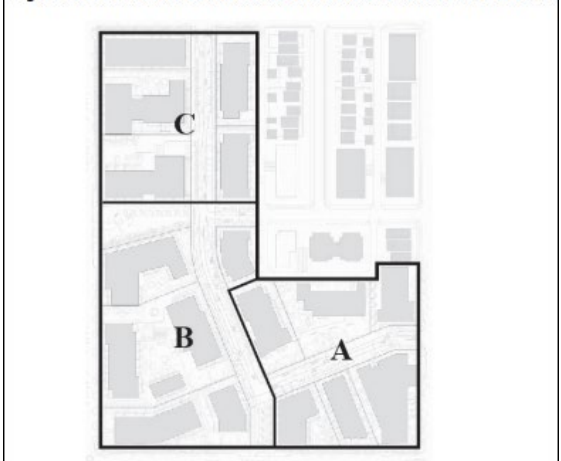
Phase	Development Details	Parcels	Total Approximate Size
1	130 market units	BC	106,002 sq. ft.
	159 non-market units*	AB, AC, BB*	147,742 sq. ft.
	Commercial space	AC, BC	28,838 sq. ft.
	neighbourhood house	AB	12,000 sq. ft.
	Child daycare	AB	8,224 sq. ft.
2	Public Plaza	AB	12,092 sq. ft.
	242 Market units	AA, EC, EB	234,833 sq. ft.
	123 Non-market units	BA, EA	141,880 sq. ft.
3	Commercial space	AA	3,948 sq. ft.
	519 Market Units	CD, CB/CC, CA	558,024 sq. ft.
4	Wedge Park	Wedge Park	23,254 sq. ft.
5	*to be combined with phase 2 as per conditions of rezoning in appendix B		
	400 Market units		420,878 sq. ft.

*Includes existing 53 unit social housing building completed in 2015

Figure 2: Sub Areas for Maximum Permitted Building Storeys and Building Height



Figure 1: Sub-Areas for Maximum Permitted Floor Area and Permitted Uses



“RETAIL”

- commercial and retail space (3,046 m²)
- Commercial/retail - 3,046 m² (32,786 sq. ft.) of local-serving retail and commercial uses are proposed to be located on Main Street and adjacent to the Public Plaza. During the development of the Policy Statement, a retail study supported a modest amount of local serving retail and commercial uses such as a café, small grocery store or pharmacy. A small amount of professional office space could also be considered to enhance and complement the retail space.
- the Public Plaza in the southeast quadrant of the site. The Public Plaza provides an important neighborhood hub with local serving retail, the Little Mountain Neighbourhood House and a childcare around it
- Additional retail space has been added to the building at the juncture of the Central Street and the Public Plaza to further activate the western edge of the space
- Design development to activate the rear façade of ground level retail on Building BC along the pedestrian walk shared with the existing senior’s affordable housing.
- The community plaza and other community assets and amenities are clustered together, with a retail frontage on Main Street, bringing people into the site
- There will be family housing in the two buildings on Main Street, with the ground floor containing retail, possibly a food store.
- The Community Plaza in the southern portion of the site is organized around several retained trees. It will also be the social focus of the community, with an adjacent neighborhood house and surrounding local retail.
- Active retail use has also been introduced to the base of the market building that fronts the western edge of the plaza.
- fixed furnishings and provisions for moveable tables and chairs, especially in the immediate vicinities of retail / outdoor eating at grade in Buildings AA and AC
- Retail and commercial frontages are oriented towards Main Street and wrap the corner to draw pedestrian activity into the site at the Community Plaza
- The proposed rezoning would permit the construction of a mixed-use development consisting of approximately 1.6 million square feet of development consisting of approximately 1,573 residential units, 3046 m² of commercial and retail space and building heights of between three and 12 storeys.
- Retail/Commercial 3,046 m² (32,786 sq. ft.)

DEVELOPMENT 2

Oakridge Transit Centre

<https://council.vancouver.ca/20201020/documents/rr2.pdf>

FIGURES

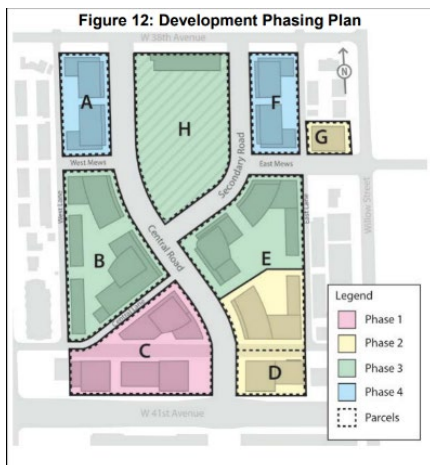
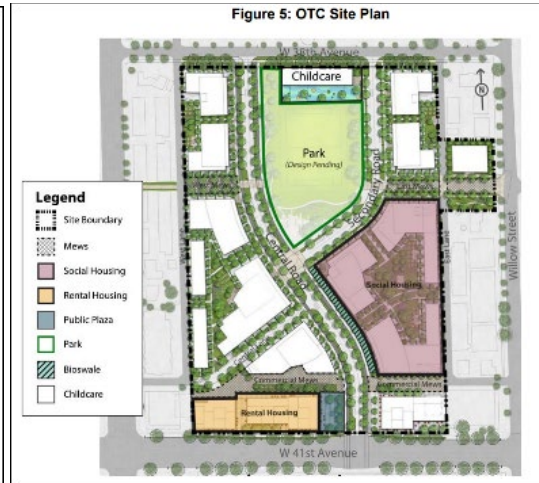
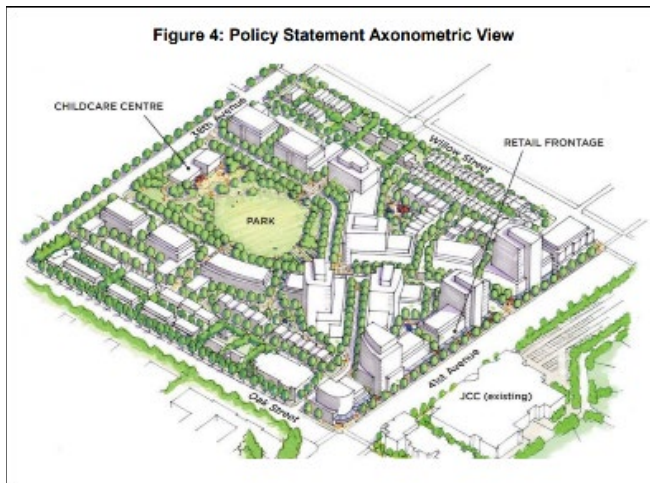
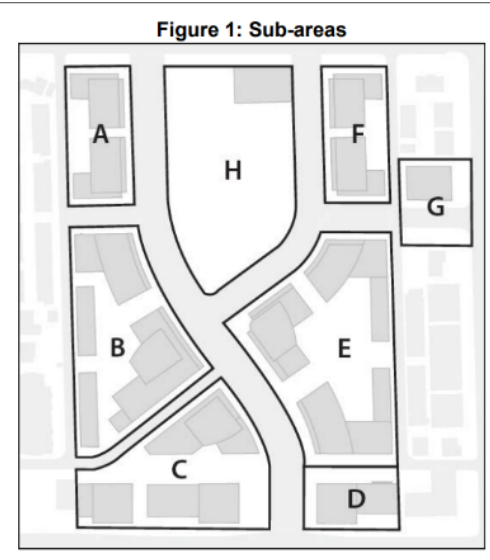


Table 1: Development Phasing

Phase	Development Details	Parcel(s)	Approximate Floor Area
1	Market Housing	C	304,200 sq. ft.
	Rental Housing	C	126,400 sq. ft.
	Commercial Space	C	13,900 sq. ft.
	Commercial Mews and Plaza	C	n/a
2	Market Housing	D, G	214,300 sq. ft.
	Commercial Space	D	8,100 sq. ft.
	Commercial Mews	D	n/a
	Social Housing (turnkey)	E	75,700 sq. ft.
3	Social Housing (bare parcel)	E	131,100 sq. ft.
	Market Housing	B	318,100 sq. ft.
	Social Housing (turnkey)	E	70,800 sq. ft.
	Commercial Space (bare parcel)	E	2,000 sq. ft.
4	2-acre Public Park	H	n/a
	69-space Childcare Facility	H	8,500 sq. ft.
	Market Housing	A, F	195,200 sq. ft.



Parcel & Building	Stories	Material	Residential sq ft	Commercial sq ft	Daycare sq ft	Total sq ft	Height ft(m)	Fed. No. of Units
A-1 (apartment)	6	conc.	47,033			47,033	60' (18.3)	54
A-2 (apartment)	6	conc.	51,765			51,765	60' (18.3)	60
B-1 (apartment)	8	conc.	85,884			85,884	80' (24.4)	98
B-2 (apartment)	1b	conc.	202,256			202,256	150' (45.7)	231
B-3 (townhouse)	3	wood	14,423			14,423	30' (9.1)	11
B-4 (townhouse)	3	wood	15,529			15,529	30' (9.1)	12
C-1 (apartment)	20	conc.	180,541			180,541	200' (61.0)	184
E-2 (apartment)	25	conc.	158,297	1,630		158,877	230' (70.1)	180
E-3 (rental app.)	17	conc.	94,764	16,295		105,059	170' (51.6)	125
D-1 (apartment)	26	conc.	158,877	8,075		204,952	280' (79.2)	222
F-1 (social hsg.)	12	conc.	70,720	2,000		109,170	120' (36.6)	149
F-2 (social hsg.)	6	conc.	70,789			70,789	60' (18.3)	91
E-3 (social hsg.)	6	conc.	75,680			75,680	60' (18.3)	91
F-1 (apartment)	6	conc.	49,985			49,985	60' (18.3)	57
F-2 (apartment)	6	conc.	46,422			46,422	60' (18.3)	52
G-1 (townhouse)	3	wood	17,434			17,434	30' (9.1)	15

“RETAIL”

- Further, a small commercial space of approximately 2,000 sq. ft. is proposed near the park at the intersection of the Central and Secondary Roads within Building E-1. The intent of this space is to provide a small-scaled, local retail opportunity such as a café, corner store, or restaurant.
- Commercial space for retail and office uses is estimated to range between 930-1,860 sq. m (10,000-20,000 sq. ft.).
- The revised submission includes an additional 9,000 sq. ft. of retail space, raising the total proposed retail space to 24,000 sq. ft.
- Retail Uses, limited to Farmers’ Market, Furniture or Appliance Store, Grocery or Drug Store, Grocery Store with Liquor Store, Liquor Store, Public Bike Share, Retail Store, Secondhand Store, and Small-Scale Pharmacy;
- Local-serving shops and services will be located primarily along 41st Ave., except for a 1,750 sq. ft. retail space located fronting the park and the linear green boulevard. A total of 15,000 sq. ft. of commercial uses are proposed.
- access to the buildings fronting the primary north-south street and facing the green boulevard. The applicant noted they have created a pedestrian mews parallel to 41st Ave. where the retail is double fronted.
- the development will also provide 24,000 sq.ft. of commercial retail space, to be primarily located along 41st Avenue to animate the south edge of the site.

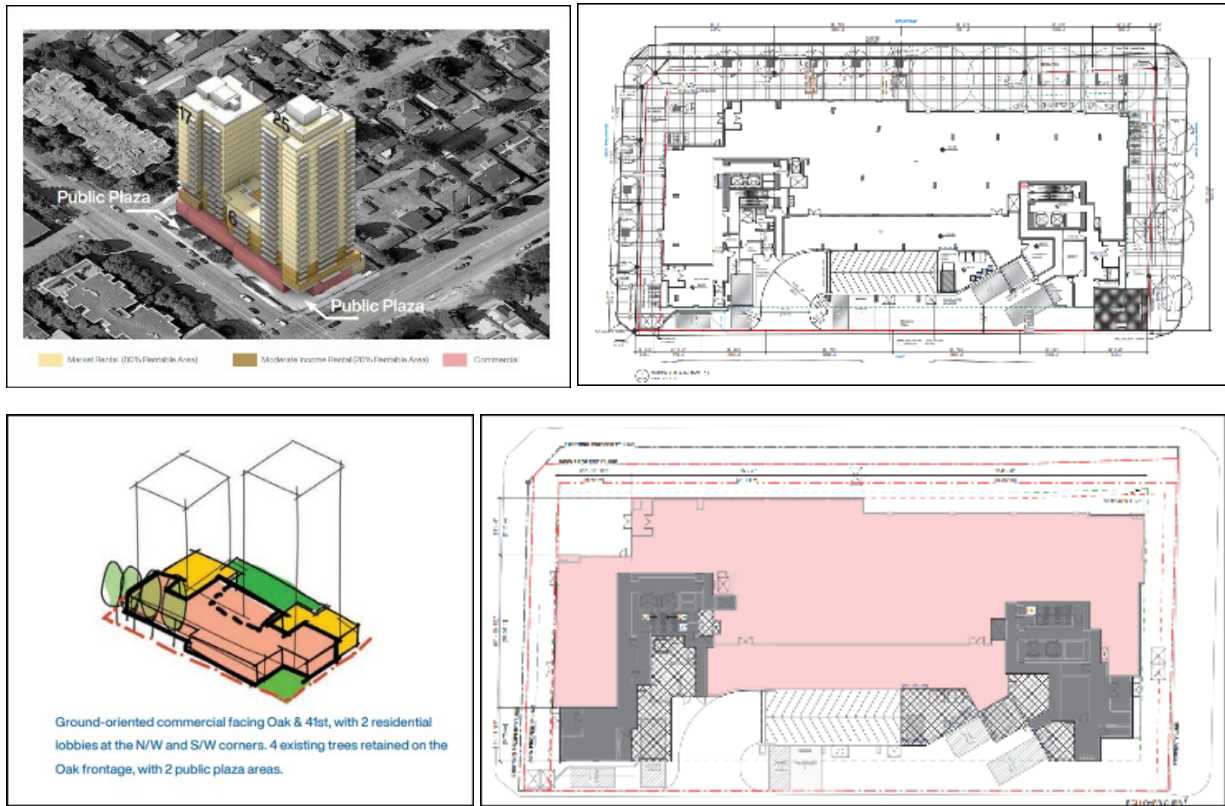
- The Entry Corner Plaza is located at the northwest corner of the intersection of the Central Road and West 41st Avenue within a streetscape of buildings with retail and restaurant uses at the ground floor level.
- Total commercial area: 24,000 sq ft (2,229.7 sqm)

DEVELOPMENT 3

Oak St & West 41st Ave

<https://rezoning.vancouver.ca/applications/1008-w-41st-ave/application-booklet.pdf>

FIGURES



GFA/FSR AREA SCHEDULE	
USAGE TYPE	AREA
LEVEL 01	
COMMERCIAL	14226 SF
RESI. COMMON	4242 SF
EXCLUSION	
SERVICE	2171 SF
	20639 SF
LEVEL MEZZ	
EXCLUSION	
SERVICE	8003 SF
	8003 SF

“RETAIL”

- 16,398 sq.ft. of Commercial Retail at grade
- This application proposes to redevelop the site to include one 25-storey rental tower and one 17-storey rental tower, connected by 6-storey podium offering retail at grade.
- approx. 16,398 sf of new local serving ground-oriented retail space. This new retail space provides opportunity for a pharmacy or small grocer use and will serve future residents of the proposed development and the surrounding community alike.
- The project will introduce new retail space to the site, including the opportunity for a pharmacy or small grocer, which will improve access to amenities, shops, and services for new residents and the existing local community.
- The project takes into consideration a broad range of City-wide policies including active uses along the streets, provision of 100% secured rental housing and MIR units, and retail uses at grade.
- The project is designed in accordance with the High-Density for Families with Children Guidelines by providing in-building amenity spaces catering to the needs of children and retail services at the ground level with the potential for a pharmacy or small grocer use.
- The proposal includes a mix of much needed market and affordable rental, and retail within the Oakridge MTC area, within a 5-10 minute walk from the Oakridge-41 Avenue SkyTrain Station
- The site is diagonally opposite from Oakridge Transit Centre, which will provide a new park, retail/shops, and a childcare facility. Additionally, it is directly across from the JCC Redevelopment Project, which will provide access to a new 200,000+ sq. ft. recreational, cultural & community hub, cafe/food services, childcare and senior care.

DEVELOPMENT 4

Heather Lands

<https://council.vancouver.ca/20220412/documents/rr5.pdf>

FIGURES

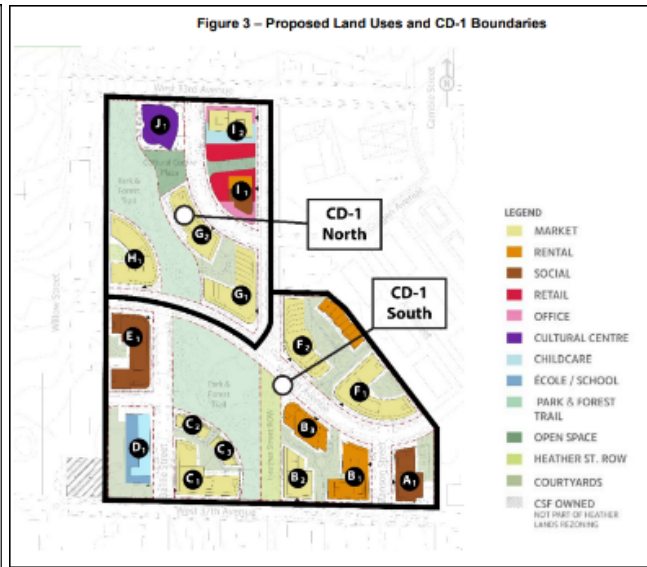
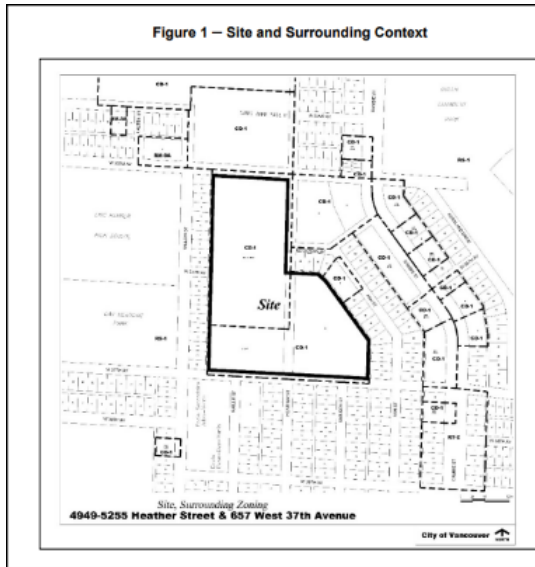
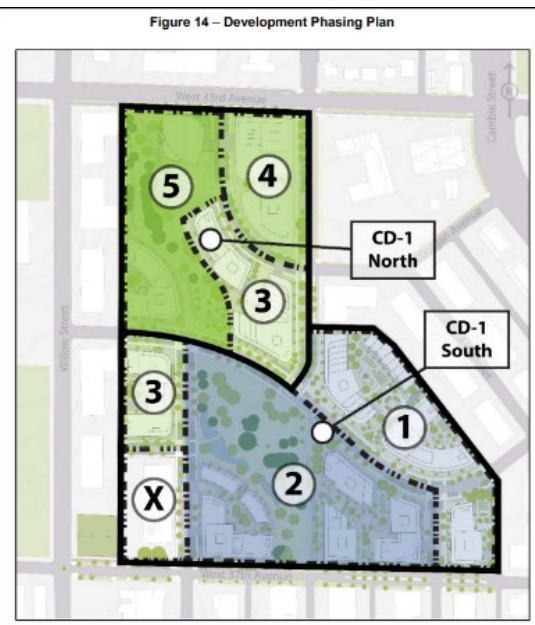
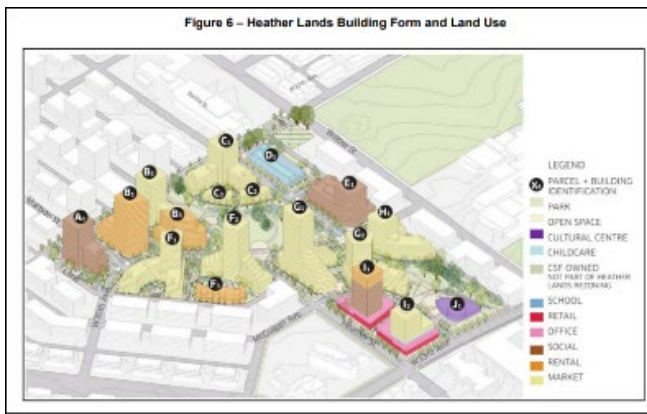


Figure 4 – Floor area breakdown by use and CD-1

	CD-1 (South)	CD-1 (North)	Combined
	Sq. ft.	Sq. ft.	Sq. ft.
Residential Floor Area	1,535,235	860,591	2,395,826
Leasehold Strata	826,204	733,203	1,559,407
Rental	361,059	24,893	385,952
Social	347,972	102,495	450,467
Commercial Floor Area	0	125,281	125,281
Retail and Service Uses	0	62,287	62,287
Office	0	62,994	62,994
CD-1 Sub-total	1,535,235	985,872	2,521,107
Excluded Amenities	50,590	34,484	85,074
Childcare	0	11,935	11,935
Cultural Centre	0	22,549	22,549
School & Childcare	50,590	0	50,590
Excluded Area Sub-total	50,590	34,484	85,074
Total	1,585,825	1,020,356	2,606,181



Development Statistics			
	Permitted Under Existing Zoning	Proposed Development	
Zoning	CD-1 (52A) and CD-1 (80)	CD-1 (South) and CD-1 (North)	
Uses	Public Authority and office uses	Mixed-use	
Floor Area	As existing	Leasehold Strata	144,874 sq. m
		Rental housing	35,856 sq. m
		Social housing	41,850 sq. m
		Retail and Service	5,787 sq. m
		Office	5,852 sq. m
		Sub-total	234,219 sq. m
		Excluded Amenities:	
		Childcare	1,109 sq. m
		Cultural Centre	2,095 sq. m
		School and Daycare	4,700 sq. m
Height	n/a	89.3 m (28 storeys)	
Parking, Loading and Bicycle Spaces	as per Parking By-law	as per Parking By-law at time of Development Permit application	

Figure 15 – Development Phasing

Phase	Development Details	Parcel(s)	Approximate Floor Area (sq. ft.)
CD-1 South			
1	Social Housing (198 units)	A	164,739
	Rental Housing (10 units)	F3	21,878
	Below Market Rental (4 units)	F3	7,293
	Market Housing (498 units)	F1+F2	460,606
2	Rental Housing (271 units)	B1+B3	248,916
	Below Market Rental (88 units)	B1+B3	82,972
	Market Housing (176 units)	B2	164,129
	Southern Park	park parcel	
X	Market Housing (205 units)	C	201,469
3	CSF School	D	excluded area
3	Social Housing (220 units)	E	183,233
CD-1 North			
3	Market Housing (512 units)	G	471,324
4	Social Housing (122 units)	I1	102,495
	Rental Housing (19 units)	I1	18,670
	Below Market Rental (8 units)	I1	6,223
	Market Housing (93 units)	I2	260,879
	74-space Childcare Centre	I2	excluded area
	Retail	I1 & 2	62,287
	Office	I1 & 2	62,994
5	Northern Park	park parcel	
	Cultural Centre & Plaza	J	excluded area
	Market Housing (188 units)	H	175,620



“RETAIL”

- In response to the Employment Lands and Economy Review, the proposal includes an additional 6,464 sq. m (69,581 sq. ft.) of office and retail floor area. This provides for new employment space close to new housing, in a location well served by transportation improvements
- Retail Passage – At the north end of the site, a vibrant retail passage connects Heather Street to the cultural centre plaza to become the heart of the new neighbourhood.
- Additional floor area for shops and services – Additional retail space was added to better serve local needs within walking, rolling and cycling distance of homes.
- Retail Uses, limited to Farmers’ Market, Neighbourhood Grocery Store, and Retail Store; and
- In sub-areas B, C, and F, uses are limited to Dwelling Uses, except that Retail Uses may be permitted at-grade fronting Heather Street, West 35th Avenue or West 37th Avenue.
- The total floor area for retail uses in sub-areas B, C, and F combined must not exceed 230 m².
- In sub-areas G and I combined, the floor area for Cultural and Recreational Uses, Institutional Uses, Live-Work Uses, Retail Uses, and Services Uses combined must not be less than 5,787 m².

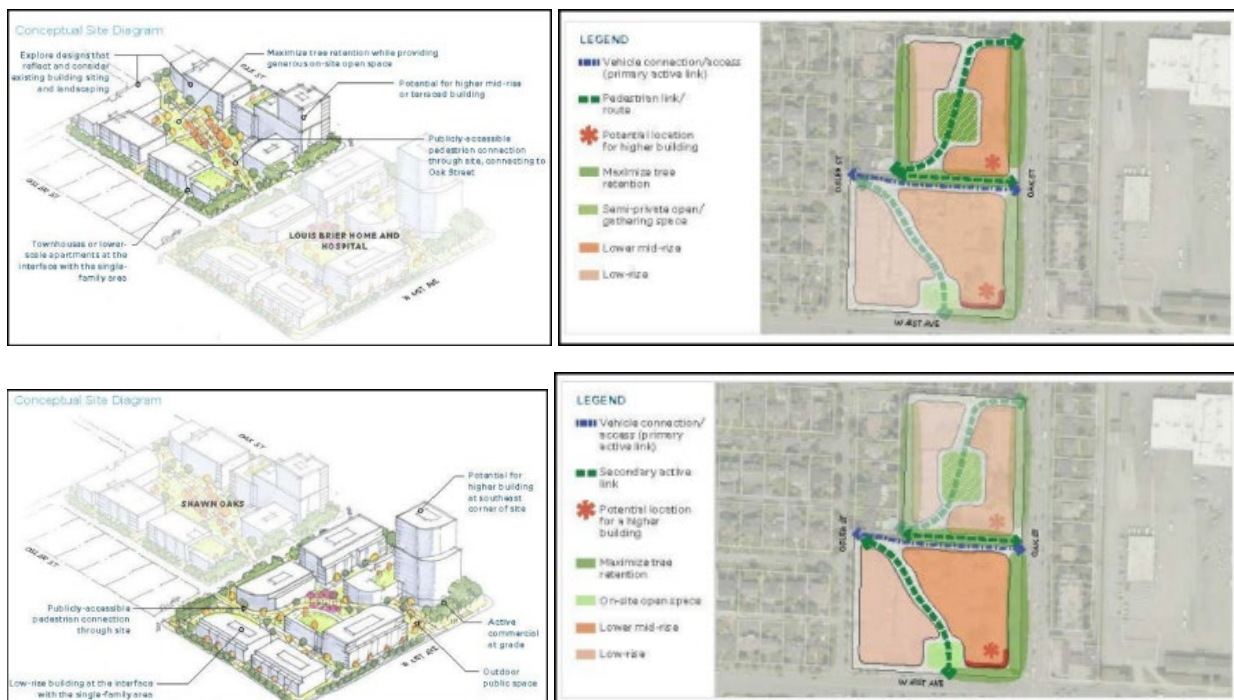
- Design development to ground level retail/commercial frontages along Heather and New Commercial St. to contribute to street character and an engaging interface for pedestrians.
- Arrangements are to be made to the satisfaction of the General Manager of Engineering Services and the Director of Legal Services for registration of Statutory Right of Ways for the proposed Cultural Centre Plaza (Parcel J) and retail passage (Parcel I).

DEVELOPMENT 5

Shawn Oaks/Louis Brier

<https://council.vancouver.ca/20230426/documents/pspc3.pdf>

FIGURES



“RETAIL”

- Proposal for 1055 West 41st Avenue and 5650 Osler Street (Louis Brier) - at-grade commercial uses
- (Louis Brier) - Activate the southeast corner of the site with at-grade commercial space. Frontages should wrap building corners and building setbacks should create a strong relationship with surrounding sidewalks and adjacent outdoor public spaces

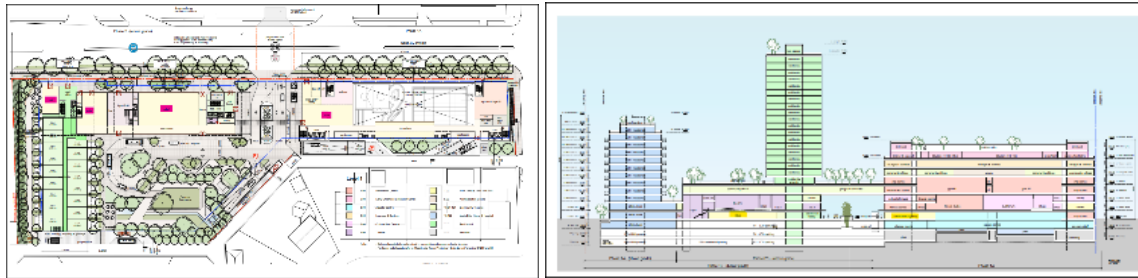
DEVELOPMENT

JCC:

- <https://wayback.archive-it.org/8849/20211022003019/https://rezoning.vancouver.ca/applications/950w41stave/documents/floorplans.pdf>

- <https://wayback.archive-it.org/8849/20211022003315/https://rezoning.vancouver.ca/applications/950w41stave/documents/sectionsoriginal.pdf>
- <https://wayback.archive-it.org/8849/20211021195142/https://rezoning.vancouver.ca/applications/950w41stave/index.htm>

FIGURES



“RETAIL”

- JCC Redevelopment Project, which will provide access to a new 200,000+ sq. ft. recreational, cultural & community hub, cafe/food services, childcare and senior care.
- ground-level commercial space;