

What We Heard:

External Advisory Group Meeting #3

Employment Lands & Economy Review

The City of Vancouver is developing a long-range land use policy plan to ensure the city has an appropriate supply of land and business space to support jobs and the growth of the economy. As part of this review, the City is engaging with a range of stakeholders, business sectors and members of the public to collect feedback at key project milestones and help inform the plan.

About the External Advisory Group

The City of Vancouver has assembled an External Advisory Group (EAG) to help inform the Employment Lands & Economy Review. The EAG consists of a diverse range of perspectives including industry associations, labour representatives, Indigenous groups, not-for-profit organizations, representatives from the development industry and businesses from over 18 economic sectors. The role of the EAG is to provide input and insight at key milestones throughout the planning process.

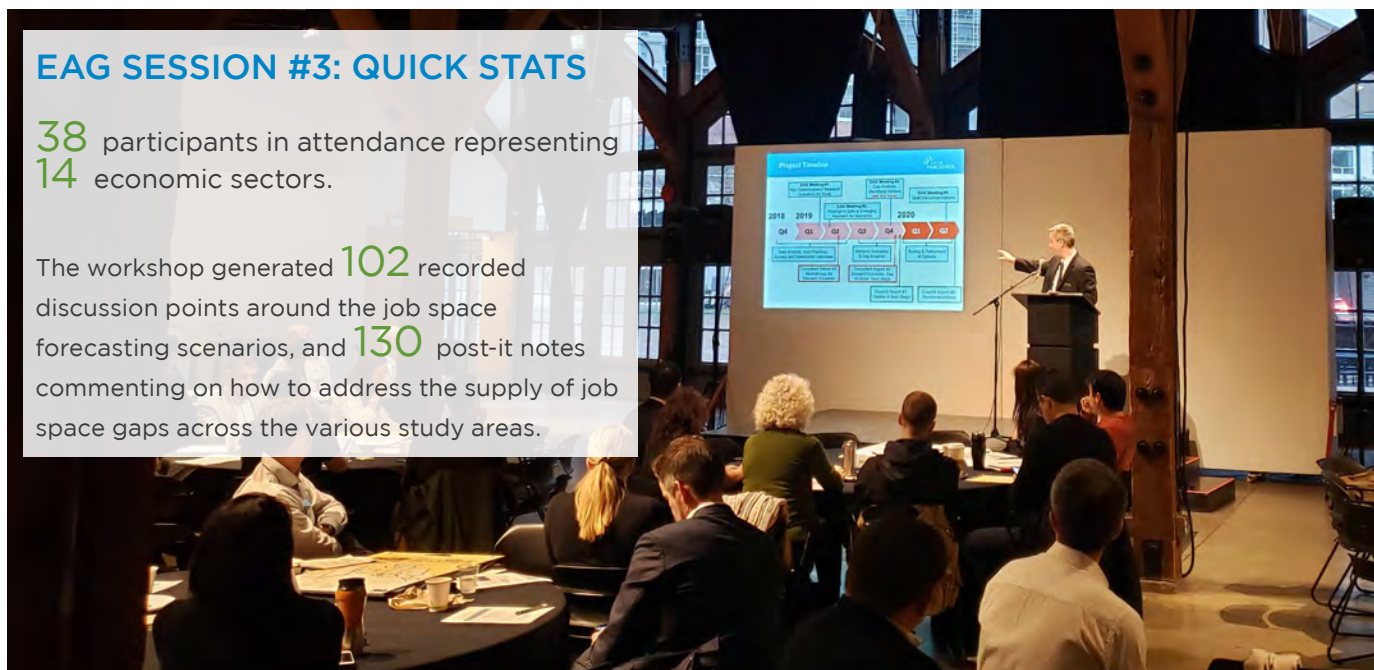
Session #3

The third meeting of the EAG was held on October 17th, 2019. Participants were asked to provide feedback on the job space forecasting scenarios, the implications for the different types of job space, and how to address the supply gaps for job space types across the various study areas. Summaries of these discussions are outlined in this document. The project consultants have received the feedback from this session and are incorporating it into their ongoing work. See the Appendix for a list of all the boards presented at the workshop.

EAG SESSION #3: QUICK STATS

38 participants in attendance representing
14 economic sectors.

The workshop generated **102** recorded discussion points around the job space forecasting scenarios, and **130** post-it notes commenting on how to address the supply of job space gaps across the various study areas.



The Workshop

Activity 1:

Following the presentation of the scenarios and gap analysis, participants were prompted with three questions to consider for twenty minutes of discussion:

- Do the demand scenarios seem reasonable?
- Does the supply model seem reasonable?
- What are the potential implications for each type of job space?

Participants were asked to identify their industry and provide feedback through discussion. They were also provided with summary handouts of the future potential capacity and demand forecasts for each job space type.

The results from this workshop activity are presented on the following pages. See the Appendix for materials used in this exercise.



Space Forecast Scenarios and the Gap Analysis by Job Space Type

This section collects and condenses the main discussion threads from the seven facilitated groups undertaking Activity 1. The threads are presented by job space types as outlined below and then broken down by thematic subject within each space type. Participants generally felt that the demand scenarios were reasonable or lower than expected. While there was discussion on all four job space types, implications for industrial land and suggestions for City actions around them generated the most points of discussion with 37% of all recorded points. This was followed by general comments and suggestions that were not directed to any particular job space type at 25% of all recorded points. The need to provide separation of Hotel from the Commercial was an emerging point of discussion.

Key Employment Land Categories

Major Office

- Typically free standing office
- Greater than 20,000 sq.ft.
- Distributed across a few major regional agglomerations.



Industrial Areas

- The following uses can be found in heavy or light industrial areas:
- factories, distribution warehouses, business parks, high technology studios, and arts and cultural spaces.



Retail and Services

- Primarily serves local resident population and tourism sector
- Includes retail, hotels, restaurants, small offices, non-profits, and arts and cultural spaces.



Institutional

- Serves local and regional population
- Includes education, health care, local government.



1 Major Office



Feedback Themes:

Demand Modeling

- Participants in the EAG generally felt that the demand projections for major office were correct or too low.
 - A suggestion was put forward with regards to removing the lowest two scenarios as the current pipeline has already exceeded those levels.
 - Questions were posed about addressing highest and best use and implications for traffic, connectivity and transit.

Affordability of Office Spaces

- There were questions about affordability of new office spaces and whether sizing was appropriate.
 - There was some concern about whether there was actual capacity at Grandview Boundary for more office.
 - There were suggestions around clustering and exploring more mixed use combinations to increase density.
 - Flexibility in zoning was also suggested in order to provide adaptability in case of an economic downturn.

2 Industrial Areas



Feedback Themes:

Demand Modeling

- There was an impression among some EAG participants that the demand model was showing a decrease in industrial demand.
 - Some participants noted that, to their knowledge, demand for industrial space, especially small-scale industrial space, is high and will likely increase in the future.

Definitions of Industrial Uses and Flexibility in Zoning

- Participants made several comments around current definitions of industrial being too loose, thus eroding actual industrial uses (in favour of office).
 - Delegates also discussed how these definitions would evolve in the future.
- Some participants also raised the issue of the allowed uses in the current zoning being too rigid and thus the lack of flexibility was limiting the businesses and built forms that could exist in the industrial areas.
 - Multi-level industrial was put forward as a way to allow mixed uses on site and achieve a balance between the various uses that exist in industrial sites.
 - Some also suggested the need to include residential, office and other commercial uses in these buildings to further increase the flexibility of the sites.

2 Industrial Areas (continued)

- Some anecdotes were shared concerning the difficulty in tenanting middle floors of multi-storey industrial buildings since strictly industrial users are more difficult to find.
- Size issues were also raised between large and small scale users.
- Participants from the film industry noted that larger studio spaces are needed.
 - This industry can make use of older buildings since digital post production is concentrated in the Mount Pleasant area.
- Other suggested improvements were discussed, such as:
 - Densification of parking uses.
 - Expansion of commissaries and laundry facilities.
 - Ability for retail sales on industrial sites.

Conflict with Other Uses

- Participants raised several issues around the imbalance between industrial uses and other higher-value uses, such as Office, that is being built above them.
 - Anticipation of rezoning to higher uses is causing developers to wait and not develop industrial lands.
 - Higher construction costs and the desire to protect industrial uses from erosion to other uses are limiting the redevelopment of industrial areas where spaces are sitting vacant or under-used.
 - Integration of heavy industrial with other uses is suggested as achievable but it was also acknowledged that mitigation will be expensive.
 - There was a suggestion that encroaching commercial uses be moved off to nearby high streets.

Warehousing Distribution

- Participants in the trucking and warehousing industry in particular, were noting that their industry was showing increasing demand for warehouse and distribution space as close to the core as possible.
 - Some suggested taller built forms to accommodate warehousing and other compatible uses since transport costs have direct impact on the cost of goods and the environment.
- Participants cited Produce Row as an example of an essential city-serving function for warehousing and distribution that is performed on industrial land.
- Participants suggested that the ability to co-locate office and warehouse represents further savings and increases sites' desirability to the industry to operate efficiently.

Non-Profit and Amenity Issues

- Non-profit sector representatives pointed out that non-profit users are particularly affected by issues with permitted uses on industrial land.
 - Some definitions preclude artists from taking up manufacturing space.
- They suggested that Social-Purpose be added to the allowable uses and that non-profit users be put forward as amenities in industrial areas such as retail and childcare.
- There was a suggestion that Residential be allowed as a conditional use as long as industrial is provided.
 - This would increase ridership along the transit lines and balance out decreasing worker needs due to automation.

3 Retail and Services



Feedback Themes:

Demand Modeling

- Participants were concerned around the model showing gaps between supply and demand for commercial.
 - A question was raised whether this gap could be filled in the industrial lands and used to improve the pro forma for industrial redevelopment.
- Participants noted that it was mostly retail demand that was decreasing while non-retail uses were increasing the demand for commercial spaces.
- Participants thought that the Commercial category was too large a catchall.
 - Participants suggested that in order to present the supply issue, a more detailed look using more discreet sub-categories of retail would be useful.

Tourism Concerns

- Representatives from the Tourism and Transportation sectors raised concerns regarding potential loss of tourist hotel traffic to adjacent cities due to lack of supply.
 - This will have cascading effects on businesses in the city.
 - City cannot host large conferences.
 - Ancillary benefits of cruise ships not being tapped.

- It was pointed out that there is a trend for increasing size in cruise ships and a second port would need to be constructed outside of Vancouver for ships that cannot pass under the Lion's Gate Bridge.

High Streets and Shopping

- Participants discussed what the shopping and retail should be like in Vancouver:
 - Consider them as proper “third spaces”.
 - Consider effects of current zoning which tends to keep built form lower scale, may need to add public realm features like benches.
 - Comparison between Davie (organic development) and Robson (active zoning for shopping).
- Some participants pointed out that Vancouver's shopping centre performance is very strong:
 - Strength comparable across Canada and despite trends towards online shopping.
 - Proximity of Pacific Centre to Robson still allows both to flourish.

Development Considerations

- Participants from the development community pointed out hesitancy in developing second floor retail.
- While the decrease in retail areas was not disputed, it was raised that the smaller floor areas are much more customer-experience focused.

4 Institutional



Feedback Themes:

Demand Modeling

- EAG participants were concerned with the inability to predict institutional demand.
 - Participants indicated that this area needs to be addressed.
 - A suggestion was put forward to reach out to the major institutions to gain insight into their planning.

Other Considerations

- Participants raised other questions around institutional spaces:
 - Looking to define what differentiates Institutional from Office.
 - Requirement for childcare in institutional sites.
 - Consideration for other land uses that are part of the Institutional use such as open spaces, worker housing and industrial-like uses for research.

* Other Feedback

Hotel Feedback Themes:

Classifying Hotel

- Participants suggested that hotels be given their own category as the use has difficulty competing with other uses.
 - Concern that inclusion of hotels in Commercial demand would make results difficult to interpret.

Decline in Hotel Spaces

- EAG participants raised concerns around the loss of hotel area in the city:
 - This will have impacts on ability to host large conventions/conferences.
 - Effects of sharing economy (AirBnb) on hotels need to be examined.
- Participants said that the impacts of the shift of hotel supply from 2 and 3 stars to 5-stars needs to be examined.
 - It was suggested that the right mix for the city be determined.

Incentivizing Hotel Development

- Participants discussed ways to encourage the development of hotel space to generate net new supply:
 - The main issue raised was the competition of hotel space with office.
 - Design requirements were also challenging with a mismatch of parking requirements and operator preferences.
 - Regulation needs flexibility to accommodate different levels of hotel service and scale.
 - Constrained hotels also often lack key.

* Other Feedback (continued)

amenities, such as meeting rooms.

General Feedback Themes:

No Fixed Workplace Feedback

- EAG participants questioned the growth projections for this sector.
 - Participants wished to know how have space needs been captured and whether these were assumed to be at home or in shared spaces.
- It was also pointed out that future opportunities for remote working in the city are tied to housing affordability.

Demand Modeling

- Participants considered the general model to be reasonable, however there were questions with regards to how the assumptions fit into the larger economic strategy, how the land uses are evaluated and how amenity funding gets to the community.
 - In addition, it was pointed out that the shortcomings in the data do not address certain issues such as affordability, suitability of space, security of tenure and sustainability.
- Participants raised some questions with regards to how underutilized spaces can be identified and how changes in desirability will be accounted for when the Broadway Subway is completed.

Provision of Amenities for Employment Lands

- Some participants pointed out that the current labour crisis in Vancouver is partly due to a shortage of supporting amenities such as schools, childcare and park space.
 - An idea was put forward saying that there should be no net loss of park space or amenities in communities.
 - It was also suggested that non-profits be considered amenities as well since they are able to provide benefits to the community.

Suggested Ideas to Address Issues

- Participants in the EAG put forward several ideas to address issues within the city's employment lands:
 - With regards to the zoning issues, that specification on built form be used instead of specifying land uses, or performance-based metrics.
 - Another suggestion is to use broader typologies to provide more feasible options in land uses and the creation of a new flexible "campus zone" be considered.
 - Temporal space sharing can also be introduced to allow non-profits to use spaces after hours.

Land Use Changes

- Some participants, those in the film industry in particular, felt that public open spaces should also be considered in the employment lands.
 - It was noted also that the distinction between uses has been blurring and as such mixed use sites will be more prevalent in the future with higher densities.
 - In addition, changing uses within the City's processes takes time and more flexibility and adaptability was needed.
 - Principles and goals are needed in zoning guidelines to help guide allowable uses.

Other Considerations

- Automation does not affect all sectors equally with a lot of manual labour is still utilized in the film and food industries.

Activity 2:

Following the presentation and activity 1, participants were invited to provide feedback on job space based on location in the city. Key job space areas in the city were presented on boards in an open house format. Participants were asked to browse the Study Area boards and add comments relating to the types forecast scenarios and types of job space in the areas, or general comments. City-wide job space boards for Retail and Commercial, and for the rest of the city were also included.

The results from this workshop activity are presented on the following pages. See the Appendix for all the poster boards used in this exercise.

Space Forecast Scenarios and the Gap Analysis by Location

This section outlines the results of the space type and location specific feedback from participants. All boards generated some comments with a total of 130 post-it notes recorded across all boards. Approximately a quarter of the notes were placed on the Eastern Core board. Comments on the Central Broadway, the Rest of City and South Vancouver Industrial boards represented another one-third of the total comments generated. The Retail/Commercial board represented approximately 14% of the notes.



1 Downtown West



Feedback:

Overall

- New development in the West End and Northeast False Creek (NEFC) are areas where new opportunities for the entry of high-end grocery, retail and restaurants can happen, however, how to balance the influx of higher income residents with the current commercial climate.
- High risk of losing event venue spaces in NEFC and South False Creek areas.
- The city needs to move away from car-based transport designs and move towards large scale transit solutions for the region.
- The conflict between development of office and hotel spaces is an issue of concern as hotels are less viable to develop in Vancouver.
 - The closures of the Empire Landmark, Pacific Palisades and Coast Plaza hotels in the West End are examples of this trend which is expected to have an impact on retail spending.
 - A Sonder hotel, which will take over the Coast Plaza space on Denman, is an example of automation leading to decreased job density as it has no front desk staff.
 - Hotel development should be encouraged as a density bonus rather than as a substitute for Office or Residential.

Major Office

- Vancouver is one of the largest animation/VFX and video game hubs in the world and continued office space growth would be beneficial for this industry.

Retail and Commercial

- Increased flexibility, along with the permitting mixed uses for new developments, for the retail spaces along Davie Street and in the West End area in general would be beneficial.

Institutional

- The West End will lose approximately 5,000 jobs due to the relocation of St. Paul's Hospital.

2 Central Broadway



Feedback:

Overall

- Central Broadway is a highly desired area for flexible uses which will only grow with the addition of rapid transit access.
 - Encourage uses that prefer movement of people rather than goods to minimize truck use of streets.
 - Encourage opportunities in the surrounding blocks from the main arterials.
 - Transit stations should be clearly highlighted with significant Commercial, Office and Residential density concentrated on those sites, these should be optimized to take advantage of the transit infrastructure to enhance job spaces and support residential affordability.
- Should develop another mixed technology and academic campus similar to Great Northern Way to house more technology-related businesses close to research and education.

Major Office

- Central Broadway has great opportunity for more office supply; need to explore availability for light-industrial shared space and space for non-profits.
 - Explore the amount of FSR needed to satisfy the land cost and the potential for mixing industrial and office space.

Industrial Areas

- Explore increase of allowed FSR from 3 to 5 in the Mount Pleasant industrial areas, coupled with flexibility in allowed uses, to satisfy high demand for space.
 - Office uses above a single level of industrial use or allowing stacked industrial buildings would likely encourage more development in the area.

Retail and Commercial

- High need for tourist accommodation in this area along with commercial services and cultural uses.

3 Downtown East



Feedback:

Overall

- Conflicting transportation needs should be addressed as freight movements and high-capacity people movements are needed to service different land uses.
 - Designate a transportation corridor dedicated to freight and another for people movement and zone land according to their proximity to these corridors.
- Safety and loss of amenities is a concern in this area and need to demonstrate accommodation and valuation of quality jobs that reside here, particularly jobs for people with barriers.
- Recognition needed for the informal economy and the role which social enterprise plays in the area, along with the arts and cultural aspects of Downtown East.
 - Maintain artist production space.
 - Suggest imposing no net loss for such spaces, special zoning for an east-side arts district and recognition for the cultural heritage of the area.
- Need for thoughtful flexibility in the area's land use, allowing for accommodation of similar uses while protecting industrial uses from conversion to more office spaces.

Industrial Areas

- Support industrial uses to complement the Port's activities in the area while allowing densification through multi-level mixed use.

Retail and Commercial

- Renewed role for retail and services in the area similar to the previous role of Hastings Street in its pedestrian accessibility from Downtown.

4 Eastern Core



Feedback:

Overall

- Lower Mount Pleasant area has organically evolved into a significant technology hub, however transportation, amenities and other supporting spaces are not in place.
 - Relic Entertainment, Atomic Cartoons, DHX Media, and Method Studios together employ approximately 3,000 people.
- Encourage the promotion of mixed use development in order to support further growth in the area.
 - Mix of uses would include office, retail and institutional in addition to industrial uses
 - There was both opposition and support for the inclusion of residential uses.
 - Need to support city-serving businesses that provide food security as well as waste processing and manufacturing for sustainability.
 - Transit stations should be clearly highlighted with significant commercial, office and residential density concentrated around them that is optimized to take advantage of the transit infrastructure to enhance job spaces and support residential affordability.
- There are non-profit organizations and artists in the area facing a variety of issues:
 - Need to protect existing older spaces to assist with provision of inclusive, low-barrier, high-paying employment as well as training and skills development.
 - Spaces are also needed to support city-serving activities such as recycling, rail and

back-of-house work for arts & culture.

- More work needs to be done to address depth of demand for non-profit uses so they are adequately supplied.
- Arts & culture activities take place throughout the area but 153 artist buildings have been lost in 10 years, need for the creation of an east-side artist production district and requirement for no net loss plus growth policy.
- Artist production should be differentiated from Creative Manufacturing.
- Eastern Core has several transportation and movement issues:
 - There are challenges with regards to north-south connections from Great Northern Way to the new St. Paul's Hospital site.
 - Existing rail infrastructure in the Flats should be used to move goods and materials into the city and waste out of the city.
 - Clark Drive should be recognized as a goods movement corridor, not a residential arterial.

Major Office

- A range of office scales should be encouraged to support companies in various stages of growth, from start-ups through to established companies.

Industrial Areas

- Industrial sites in the Eastern Core should be protected in order to complement the port, support city-serving industries, such as Produce Row, and companies that promote circular economic production and recovery models that are emerging for future economic growth.
- There is a need to improve shared light-industrial and incubation spaces for new business and start-ups.
- Support for allowing mixed-use buildings with residential on the top floor, office in the middle and light industrial at grade.
 - Must ensure the protection of industrial land uses and clarity on how industrial uses are defined.
 - Germany's policies on mixed use for industry and not-for-profit may be a potential guide.

4 Eastern Core (continued)

Retail and Commercial

- Encourage the development of retail service providers, restaurants and other amenities in the area to support consistent activation throughout the day.

Institutional

- Continue the success story of Great Northern Way campus with mixed education and creative technology spaces (animation / VFX, video games companies)
 - The area needs rental housing to support continued office, education and retail demand.
- There is a need to promote other mixed use areas with industry and academia co-located such as the new St. Paul's Hospital site.
 - There is a need for integration of programming as well as the development of new academic and research spaces aligned with industries such as tech and health.

5 Oakridge & BC Women's and Children's Hospitals



Feedback:

Overall

- City should classify its arterials according to primary use to divert the appropriate traffic through compatible thoroughfares.
- Cambie and Granville are potential tourist-oriented routes while Oak could be relegated to more goods-focused traffic.

Industrial Areas

- Build a ring of commercial-height industrial buildings around Oakridge to provide more light industrial space.

6 Grandview - Boundary



Feedback:

Overall

- Development in the Grandview-Boundary area should be focused on commercial and industrial uses that depend on good highway access such as warehousing.
- Transit-oriented development should also be encouraged.
 - Discourage the proliferation of big box stores as these do not leverage the transit access.
 - Encourage light industrial, studio, technology, arts, office and housing.
 - Transit stations should be clearly highlighted with significant commercial, office and residential density concentrated there that is optimized to take advantage of the transit infrastructure to enhance job spaces and support residential affordability.
- There is an opportunity to create a cluster of creative uses in the area with housing, office and industrial uses to make area more attractive.
 - Different uses could be stacked with residential on the upper floors, commercial on the middle storeys and light industrial on the bottom.

Major Office

- Many technology development studios have relocated to Burnaby due to delays in Vancouver's permitting process which has led to lost opportunities for jobs and projects.
 - Hopefully the spaces developed at Grandview Boundary encourage employers to move back to Vancouver.

7 Vancouver South Industrial Area



Feedback:

Overall

- There is a need to define the role of low-lying areas which may be susceptible to flooding.
- Clarity is needed regarding statements in some of the City's literature on the significance of the First Nations midden at Milton and Marine Drive and other similar sites in South Vancouver.
 - What are the City and the First Nations' expectations of developers and land owners around treatment of the middens and artifacts that may be found at the sites?
- Transit stations should be clearly highlighted with significant commercial, office and residential density concentrated there that is optimized to take advantage of the transit infrastructure to enhance job spaces and support residential affordability.

Major Office

- Opportunities for office development should be encouraged to compliment industrial uses.

Industrial Areas

- Conflicting uses in the industrial zones need to be addressed.
 - Define industrial uses and protect land that allow these uses.
 - Promote light industrial, commercial and office uses towards Marine Drive then transition to heavy industrial towards the Fraser River.

- The City should consider rezoning large unused parcels to drive redevelopment rather than allowing the land to remain idle.
- Do not allow residential uses to encroach too close to the heavy industrial areas to avoid conflicts.
- There are benefits to mixed-use buildings in industrial zones.
 - Consider broad changes to attract higher density, multi-level industrial and leverage future transit opportunity of rail corridors such as allowing for more non-industrial uses (i.e. digital product manufacturing) that can be located on upper floors to free up ground floor spaces for true industrial uses.
 - Promote multi-level industrial buildings with large floor plates and shared industrial incubators with sufficient amenities within the area. What is the long-term plan for the existing rail line along Kent Ave?
 - Are there plans for streetcar traffic and pedestrian linkages, and how would this affect the vision for this area?
- The area west of Arthur Laing Bridge needs special treatment due to its connection to UBC and its proximity to residential zones and park amenities. Allow for performance zoning.
- The area east of Oak Street offers a strategic advantage to the city in that large contiguous size or parcels allow for large scale uses like distribution centre, warehousing, wholesale and transportation, but there is risk of subdivision which should be mitigated.
- Need to understand the impact that the middens have on the approvals process.

Retail and Commercial

- There is a need for retail and other amenities to support employment in the area along with flexibility in permitted uses.

8 Rest of city



Feedback:

Overall

- The current zoning bylaw is not flexible enough to meet market needs and more flexibility of uses is required across the city.
- Include planning for public land and open spaces to provide access to several industries (i.e. tourism, film and special events) that rely on access to thrive.
- Take a thoughtful approach to the location of land use and the transportation system as different uses have different needs.
- Consider addition of rules in zoning guidelines around customer and delivery access and indicate the types of uses that are allowable based on available transportation access.
- Daycare and other amenities should be included as outright uses if they are ancillary to primary uses.
- Parking requirements for some uses are too high.

Major Office

- Technology hubs can be established anywhere where there is fast broadband and transit access as well as inexpensive or market rate office space with connections to local academia.

Industrial Areas

- Vancouver should improve its zoning for multi-level industrial uses that Richmond has already undertaken.
 - A flexible mixed-use model that allows for Residential, Retail and Commercial to co-exist is needed in order to make development on industrial land more economic.

Retail and Commercial

- Transportation infrastructure supporting movement of people to various employment lands are necessary. More consideration should be given to allowing increased development around transit lines.
- Expand the Hasting-Sunrise BIA to Boundary
 - Vancouver portion east of Cassiar to Boundary needs to be renewed with focus on traffic issues and renewal of Hastings Street.

9 Retail



Feedback:

Future Role of Retail/Commercial

- What kind of customers are served by business and the corresponding access needs of these people (i.e.: transit for retail, roads for other commercial and pedestrian access for local/neighbourhood retail)?
- Increased demand for premium retail space requires that both quantity and quality of the supply of spaces is needed to address increased consumer demand for either luxury goods or premium experiential retail locations.
- The incidence of pop-up retail is minimal.
- Traveller accommodation job counts seem low.

Opportunities

- Retail and commercial spaces are necessary for complete communities and keeping lease rates affordable.

- More flexibility in allowed uses is needed and a smoother process for changes of use to reflect changing needs quickly.
- Look to denser cities (i.e.: Hong Kong, etc.) to think beyond just ground floor spaces.
- Demand from international visitors is changing, they are looking for more fine-grain authentic experiences in the city.
- Promote collaboration between large and more established retailers and newer and independent ones to reduce conflict for available space.

Challenges

- Transportation-related challenges:
 - Retail and commercial uses require both people movement and goods movement and good access for both should be addressed.
 - There is a need to ensure transportation infrastructure is sufficiently robust to handle movement of commercial workers to the downtown core and the rest of the city.
- Affordability challenges:
 - The City needs to balance the affordability of spaces and leases and tax revenue while not discouraging local and small businesses from growing.
 - Ensuring renovated and upgraded spaces, retail and others are not faced with rising property taxes and other costs that prevent them from remaining in the operation.
- There have been significant increases in residential density, but very limited space for retail as a result.
- Loss of hotel spaces is an issue as they support the economy, need to be central and well-connected to transportation and destinations.
- Remove the requirement for a development permit for changes of use if the use is already permitted by zoning.

Appendix 1: Job Space Type Questions

Exercise #1:

Gap Analysis + Types of Job Space

- Discuss at your table
 - Do the demand scenarios seem reasonable?
 - Does the supply model seem reasonable?
 - What are the potential implications for each type of job space? What can the City do?

Appendix 2: Key Job Areas Questions

Exercise #2:

Gap Analysis + Key Job Areas

- Review the presentation boards & post comments
 - Provide feedback on the desired role of the areas, considering opportunities & challenges
 - Provide feedback for the area overall and for the floor space types

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Appendix 3: Poster Boards

Downtown West

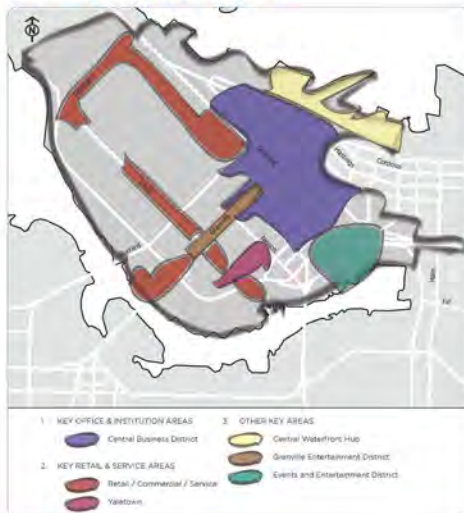
OVERVIEW



Generalized Land Use



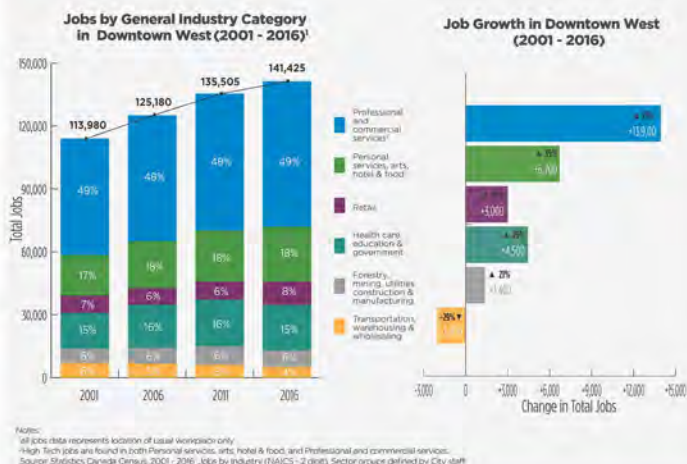
Existing Key Job Areas

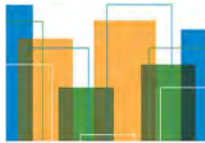


Existing Role & Context

- The Downtown West study area includes various key job areas that serve the city and regional economy** including the Central Business District (CBD), Granville Entertainment District, Yaletown, Central Waterfront Hub, West End, and a vibrant event and entertainment district in Northeast False Creek.
- The Downtown West Study Area has over 140,000 jobs or 38% of all the jobs in the City**, which play an important role in the region's economy.
- 24% job growth in Downtown West** from 2001 - 2016. By general industry category, Professional and Commercial Services accounted for half of new jobs and half of all jobs.
- The Central Business District is the region's most established and built out business and cultural district.** It is well served by local and regional rapid transit, and surrounded by diverse residential neighbourhoods.
- The Central Waterfront Area is located on the shore of Burrard Inlet in the Downtown Core.** The western part of the area is developed with several large office towers and convention facilities. The balance of the area currently contains the major CPR rail yard serving the Port as well as seaplane terminal, seabus, and cruise ship port.
- The West End, a vibrant, walkable, and complete community,** has many local businesses serving the needs of residents, people from throughout the city and region, and visitors from around the world. The area also plays a key role in providing a variety of housing opportunities to support downtown job growth and establish complete communities where residents can live, work and play.
- Northeast False Creek is a hub for entertainment and activity in Vancouver.** The area is planned to be a mixed-use neighbourhood with opportunities that support regional economic performance, while providing opportunities to live in a diverse and central location well served by amenities and services.

Key Facts and Figures





Downtown West

YOUR IDEAS

In relation to **Downtown West**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.



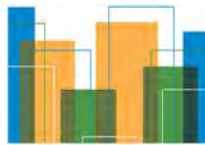
Overall

Office

Industrial

Retail and Services

Institutional



Central Broadway

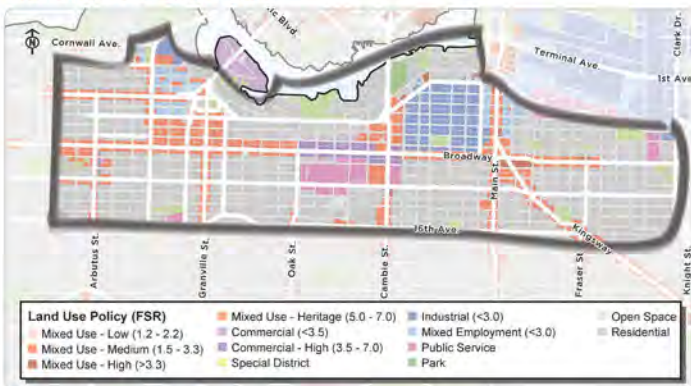
OVERVIEW

Existing Role & Context

- **The Central Broadway Study Area covers Arbutus to Clarke and W16th to False Creek.** Key employment areas include the Uptown Office District, Mount Pleasant Industrial Area, Burrard Slopes Industrial Area, and commercial businesses along the central corridor.
- **The Central Broadway Study Area has over 50,000 jobs** or 15% of all the jobs in the City, the largest jobs area after Downtown.
- **The Central Broadway Study Area is the second largest job centre in the province** and is serviced by the 99 B-line, the busiest bus route in Canada.
- **Between 2001 and 2016, the number of jobs in Central Broadway Study Area grew by 18%.** By general industry category, Healthcare, Education and Government accounted for 62% of new jobs and 39% of all jobs.
- **The Mount Pleasant Industrial Area supports a range of activity** including digital, interactive and entertainment uses, creative uses, and new breweries alongside city-serving production, distribution, and repair businesses.
- **The Burrard Slopes Industrial Area has attracted key production, service and repair businesses** such as repair shops, food manufacturing and catering. The area has also attracted professional service firms such as film and sound studios, architecture and design firms, and digital printing.
- **The new Broadway Subway will result in 50% of existing city jobs within in a 5 minute walk to a SkyTrain station** up from 40% currently.



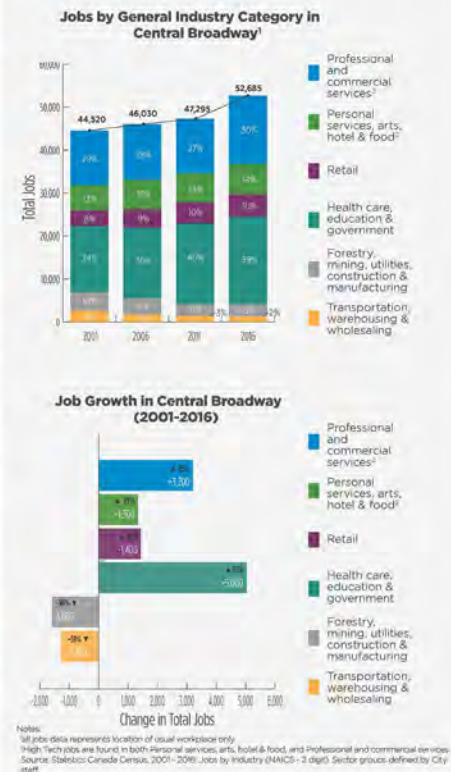
Generalized Land Use

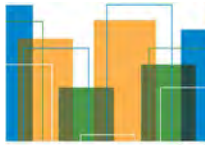


Existing Key Job Areas



Key Facts and Figures





Central Broadway

YOUR IDEAS



In relation to **Central Broadway Study Area**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.

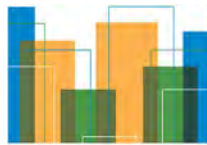
Overall

Office

Industrial

Retail and Services

Institutional



Downtown East

OVERVIEW



Existing Role & Context

- **The Downtown East study area covers diverse communities across well-known areas** including Chinatown, Gastown, Victory Square, Thornton Park, Strathcona, Oppenheimer District and the surrounding industrial areas.
- **The area has over 15,000 jobs** or 4% of all the jobs in the city.
- **Between 2001 and 2016, jobs in the area grew by 23%.** By general industry category, Personal Services, Arts, Hotel and Food led growth with over 1,700 or 62% of all jobs created over the period.
- **The area is home to people with the lowest incomes in the city** and often with multiple barriers to formal employment.
- **The complex local 'informal economy' is related to the survival livelihoods** of many of its low-income residents who are dependent on income assistance and pensions.
- **The area has the highest population of Indigenous people in the city** at 10 per cent, compared to 2% city-wide average.

Generalized Land Use

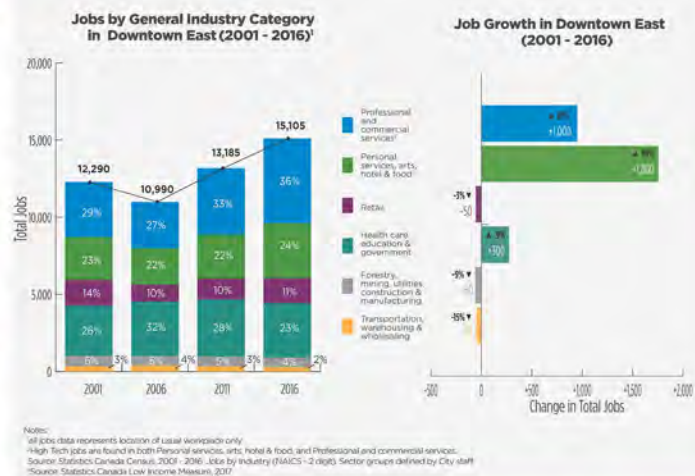


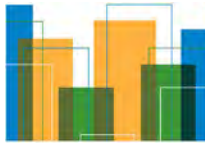
- **The large concentration of community non-profit organizations in the area** provide social, health, and employment services to residents. Ensuring that non-profit organizations have accessible, sufficient, and affordable spaces for community programs and administrative functions is essential for social, cultural, and economic vibrancy.
- **Downtown East is strategically located** with industrial land served by road, rail and adjacent Port infrastructure.
- **There is significant heritage value of the area's and city's oldest neighbourhoods** attracting the mixed-use commercial environment, digital and animation activities, creative economy, retail products and services.
- **The small start-ups of the new economy are attracted to the area** by the relatively low rents and the older, unique spaces.
- **The area also has a large concentration of social enterprises.**

Existing Key Job Areas



Key Facts and Figures





Downtown East

YOUR IDEAS

In relation to **Downtown East**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.



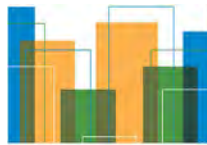
Overall

Office

Industrial

Retail and Services

Institutional



Eastern Core

OVERVIEW

Existing Role & Context

- **The Eastern Core study area includes various key job areas that serve the city and the port** including the False Creek Flats, Powell and Clark Industrial Areas, Grandview-Woodlands Neighbourhood, and Produce Row.
- **The Eastern Core Study Area has over 18,500 jobs or 5% of all the jobs in the City**, which play an important role in the region's economy.
- **16% job growth in Eastern Core** from 2001 - 2016.
- **The Eastern Core Industrial Areas support the Port and businesses within the City.** The area is well served by local and regional rapid transit, and surrounded by diverse residential neighbourhoods.
- **The Eastern Core supports passenger and freight rail** with the Burrard Inlet line servicing the Port and the CN Main Yard, the BNSF Yard, the Glen Yard, and the VIA/Amtrak station on the False Creek Flats.
- **Port activities sustain 115,300 jobs, generate \$7 billion in wages, and \$11.9 billion in GDP across Canada.**



Generalized Land Use

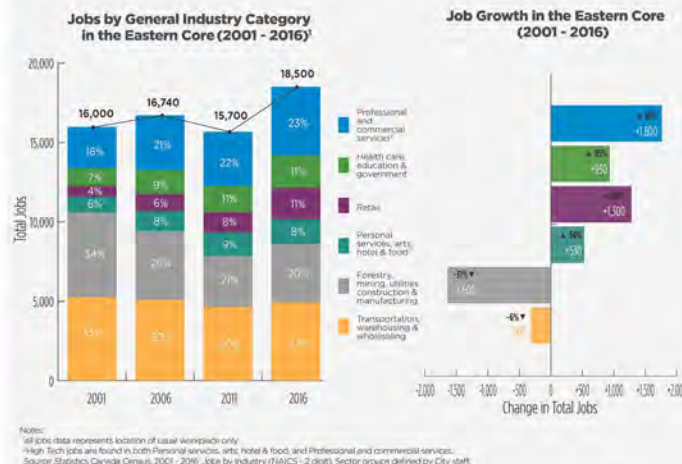


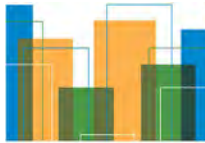
- **'Produce Row' is an important and distinct industrial business cluster of food distributors, wholesalers and food processors around Malkin Avenue in the False Creek Flats.** The unique business cluster and its well-established network of independent businesses, local customers, support low barrier jobs with upward mobility, community economic development, and affordable food.
- **The mix of employers in the area is changing with new Institutional employers.** The Emily Carr University Campus in the Learning District includes new office and institutional employers, and a station on the new Broadway Subway. Near Main Street, the new St. Paul's Hospital and new retail commercial space will bring a large concentration of jobs.
- **The Eastern Core Study Area includes a number of significant urban Indigenous social and cultural activities** within the Vancouver Aboriginal Friendship Centre and Urban Native Youth Association at Hastings and Commercial.

Existing Key Job Areas



Key Facts and Figures





Eastern Core

YOUR IDEAS

In relation to the **Eastern Core**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.



Overall

Office

Industrial

Retail and Services

Institutional

Grandview - Boundary

OVERVIEW



Generalized Land Use



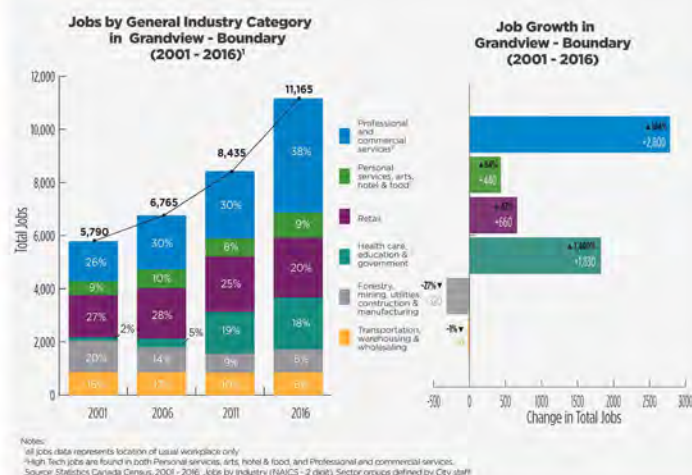
Existing Key Job Areas

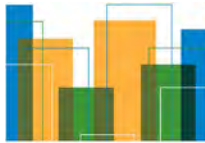


Existing Role & Context

- **The Grandview-Boundary Study Area covers the employment lands between Grandview Highway and Broadway, and between Boundary Road and Skeena Street** including the Broadway Tech Centre, several large format retailers, and the surrounding Industrial areas.
- **The Grandview-Boundary Study Area has over 11,000 jobs** or 3% of all the jobs in the City.
- **Between 2001 and 2016, jobs in Grandview-Boundary grew by 93%.** By general industry category, Professional and Commercial Services led growth in the area with 2,800 jobs or 52% of new jobs over the period.
- **The Broadway Tech Centre** located by the Renfrew Skytrain Station accounts for most of the job growth in the area.
- **The Central Valley Greenway provides active transportation access** throughout the middle of the study area to the rest of the City and beyond.
- **Grandview-Boundary is one of the few places in the City that includes large format retailers,** on a few larger sites along Grandview Highway.
- **The industrial areas in Grandview-Boundary have excellent road access,** with Grandview and Boundary both connecting to Highway 1 and the adjacent industrial areas in Burnaby. The rail corridor through the Grandview Cut bisects the study area.

Key Facts and Figures





Grandview - Boundary

YOUR IDEAS

In relation to **Grandview - Boundary**, provide your feedback on the desired role - considering opportunities and challenges - for area overall; and for Office, Industrial, Retail and Services, and Institutional.



Overall

Office

Industrial

Retail and Services

Institutional



Oakridge & BC Women's and Children's Hospitals

OVERVIEW

Existing Role & Context

- The Oakridge & BC Women's and Children's Hospitals Study Area covers Oakridge Centre and the Hospitals on Oak Street between 29th and 32nd including BC Children's Hospital, BC Women's Hospital, Canadian Blood Services, and several smaller health research and service employers.
- The Oakridge & BC Women's and Children's Hospitals Study Area has 9,500 jobs or 3% of all the jobs in the City.
- Between 2001 and 2016, the number of jobs in Oakridge & BC Women's and Children's Hospitals Study Area grew by 12%. By general industry category, Healthcare, Education and Government accounted for 64% of all jobs and 66% of new jobs over the period.



- Oakridge Centre is the geographic centre of the City and well-served by transit. The Canada Line connects to downtown and Richmond. Starting in 2020, the new 41st Avenue rapid bus service on 41st will connect the area to UBC and Burnaby.
- Oakridge Centre area has 3,000 jobs. The redevelopment plan, including retail and office expansion, will support a total of 5,000 jobs on site.

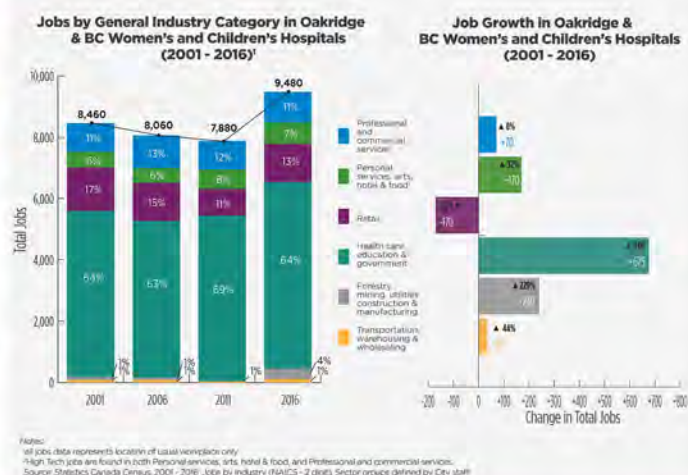


- The BC Women's and Children's Hospitals site is currently undergoing redevelopment, with the final phase nearing completion for BC Women's and BC Children's Hospitals.
- The BC Women's and Children's Hospitals area supports over 6,300 jobs with 87% in the general industry category of Healthcare, Education, and Government.

Existing Key Job Areas & Generalized Land Use



Key Facts and Figures





Oakridge & BC Women's and Children's Hospitals

YOUR IDEAS

In relation to **Oakridge & BC Women's and Children's Hospitals**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.



Overall

Office

Industrial

Retail and Services

Institutional



South Vancouver Industrial Area

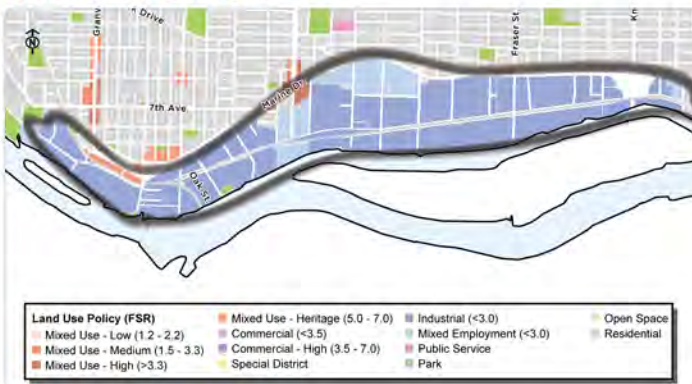
OVERVIEW

Existing Role & Context

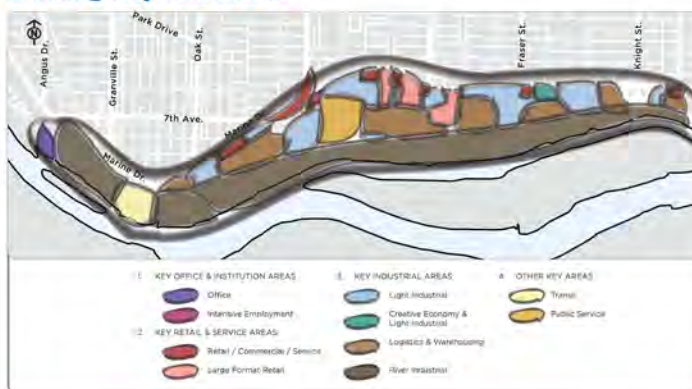
- **The Vancouver South Industrial Area is Vancouver's largest continuous industrial area** including industrial lands south of Southwest Marine Drive to the Fraser and between Knight Street and Angus Drive.
- **The rail corridor along Kent Avenue divides the more intensive industrial uses on the Fraser River from light industrial uses to the north.** The light Industrial areas include large format retail, logistics and warehousing, and retail and commercial activity at Southwest Marine Drive. The heavy industrial shoreline properties host river-based industries, such as a sawmill, solid waste material recycling, and cement manufacturing, which have access to marine shipping on the Fraser River.
- **The South Vancouver Industrial Area has 11,000 jobs.**
- **Over time, the light industrial area between Marine Drive and Kent Avenue has seen a decrease in jobs associated with manufacturing and wholesale trade.** The heavy industrial area south of Kent Avenue has also experienced declines in jobs associated with manufacturing and whole sale trade; however, the area has seen a significant increases in transportation and warehousing jobs; which can be attributed to the Translink bus barn opening in 2006 and other logistic and warehousing business activity.
- **časnaŋam, a large midden of great significance to the Musqueam people and the city of Vancouver is located in the west portion of the study area near Milton Street and Marine Drive.**



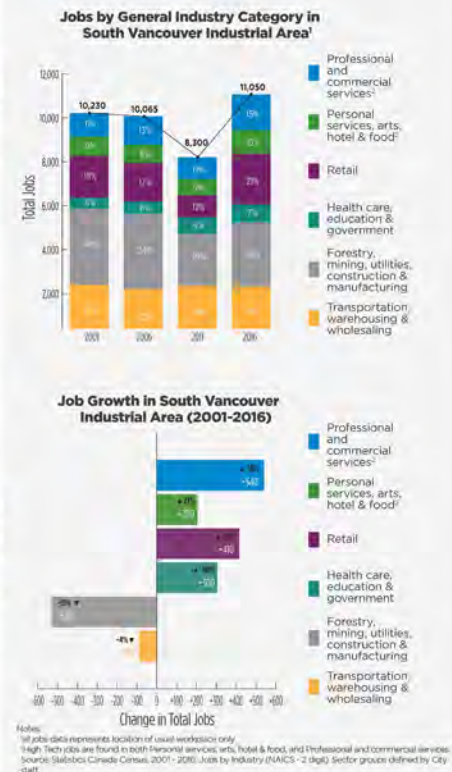
Generalized Land Use

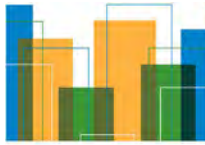


Existing Key Job Areas



Key Facts and Figures





South Vancouver Industrial Area

YOUR IDEAS



In relation to **South Vancouver Industrial Area**, provide your feedback on the desired role - considering opportunities and challenges - for the area overall; and for Office, Industrial, Retail and Services, and Institutional.

Overall

Office

Industrial

Retail and Services

Institutional

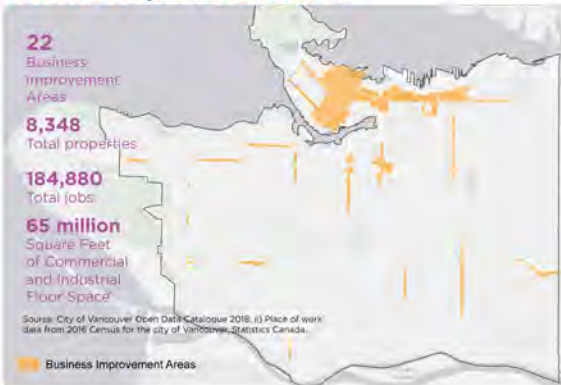


Retail / Commercial

OVERVIEW



Business Improvement Areas



Trends Affecting Retail/Commercial

- **Affordability and availability of appropriate space:** Rising real estate costs and increases in commercial property taxes/assessments are making it harder for many retail/commercial businesses to find spaces that meet their needs.
- **Rise of digital technology:** Digital technology is introducing new shopping behaviours, contributing to the growth in e-Commerce and services like app-based food delivery. This can affect retail mix and the demand for commercial space.
- **Changing property ownership patterns:** In an in-depth study of six BIAs, ownership of commercial properties shifted from 2012 to 2019, with a decrease in property ownership among individuals (-6%) and owner-occupied businesses (-16%) and an increase of ownership among holding companies (+9%) and developers (+71%).
- **New and changing retail formats:** New models of retail sector on the rise include pop-up shops, small-scale manufacturing with attached retail/service space (e.g., 'craft' districts), online retailers opening up physical shopfronts, and some formerly large-format retailers are beginning to adapt to urban areas by sizing down into smaller spaces.

Existing Role

- **Provide goods and services** including daily needs to medical services, lifestyle amenities and entertainment, both for local residents and people working in the community
- **Contribute to distinct and unique communities** through offering culturally specific goods and services, or amenities specific to local residents needs and income levels
- **Generate wealth and employment** by serving as a destination and bringing money into our local economy (e.g., through tourism or regionally significant goods and services), as well as recirculating wealth through employment and business-to-business activity
- **Support increased resilience and sustainability** through making more destinations accessible by active transportation, transit, and shorter vehicle trips.
- **Act as the "hearts" of our neighbourhoods** by providing gathering areas, defining neighbourhood identity, and serving as sites of celebration and community events

Key Facts and Figures

Jobs in Retail/Commercial Areas

Vancouver's Retail/Commercial areas host jobs from a variety of sectors. Here are the ten largest in terms of jobs (and as a proportion of total jobs in the city).



Focus on Retail



The retail sector provides local goods and services and employs nearly 40,000 people, roughly 10% of all jobs in Vancouver. About 98% of these jobs are with small businesses employing under 100 people.



Retail / Commercial

YOUR IDEAS

A Range of Retail Areas

Different retail/commercial areas serve different roles across the City, depending on their size, location, character, and types of businesses.



a) Small-scale neighbourhood retail
1-3 stores



b) Neighbourhood intersections
<1-2 blocks



c) Neighbourhood nodes
~3-5 blocks



d) Neighbourhood high streets
6+ blocks



e) Districts
Multiple blocks/
multiple streets

Future Role of Retail/Commercial Areas Across the City

Feel free to comment on types of retail areas (as described above) or specific locations

Opportunities

Challenges



Rest of City

YOUR IDEAS

Considering the areas outside the study areas, provide your feedback for the **rest of the city** on the desired role - considering opportunities and challenges - overall; and for Office, Industrial, Retail and Services, and Institutional.



Overall

Office

Industrial

Retail and Services

Institutional

External Advisory Group

Economy & Business

Economic Sectors



Groups, Associations & Government

