

Punjabi Market Commercial Area Capacity Building Work

February 8, 2024

Prepared for: City of Vancouver

Prepared by: Tate Economic Research Inc. in association with

Divercities Advisory Inc.

Roots & Rivers Consulting



TATE
ECONOMIC
RESEARCH INC.

divercities



ROOTS &
RIVERS

Andrew Pask
Senior Planner
City of Vancouver

February 8, 2024

Re: Punjabi Market Commercial Area Capacity Building Work

Dear Mr. Pask:

Tate Economic Research Inc. in association with Divercities Advisory Inc. and Roots & Rivers Consulting is pleased to provide this report summarizing the Punjabi Market Commercial Area Capacity Building Work. We look forward to discussing the results with you.

Yours truly,

TATE ECONOMIC RESEARCH INC.

A handwritten signature in black ink, appearing to read 'S. Patel', with a stylized flourish at the end.

Sameer Patel
Vice President

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Executive Summary

Tate Economic Research Inc. (“TER”) in association with Divercities Advisory Inc. and Roots and Rivers Consulting (“Consultant Team”) is pleased to provide this Commercial Area Capacity Building Work for the Punjabi Market in the City of Vancouver.

Introduction

The Consultant Team was retained by the City of Vancouver to support City and community efforts related to the renewal and regeneration of Punjabi Market with a particular focus on the commercially zoned properties.

In order to undertake the mandate, the Consultant Team produced the following:

- An updated profile of shops and services and the overall retail environment.
- An assessment of business-focused organizations that could support Punjabi Market.
- A recommended approach that area businesses could use to enhance the Market and expand their customer base.

Background

For over half a century, Punjabi Market (“the Market”) has represented an important commercial hub for Vancouver’s South Asian communities. Punjabi Market is also a cultural touch stone for many South Asian residents who either frequented the Market as early immigrants or remember going to the Market with their parents.

- The first Punjabi business opened its doors in May 1970, and one year later there were a trio of shops. From there, the Market grew steadily to being an epicentre for South Asian business, social and cultural life in both the city and region.¹

¹ City of Vancouver Memo RTS# 13413 Punjabi Market – Celebrating the Past, Envisioning the Future – Update & Next Steps. 2022. Link: vancouver.ca/punjabimarket.

- Today, Punjabi Market is defined in City policy documents as the three commercial blocks along Main Street between E 48th Avenue and E 51st Avenue. Currently there are 75 ground floor commercial businesses in Punjabi Market with 30 stores, or 40%, providing South Asian goods and services.

The South Asian commercial environment has undergone significant changes, raising several questions about the future market viability of Punjabi Market as a South Asian oriented main street.

- In response to concerns related to the future viability of Punjabi Market, several City of Vancouver Council motions have been passed in 2016, 2019 and 2022. These actions have targeted a broad range of outcomes but can generally be categorized within two areas.
 - Cultural Supports – research and actions around maintaining and enhancing the cultural identity of Punjabi Market.
 - Business Supports – research and actions around strengthening the businesses in Punjabi Market.
- During the City's Punjabi Market community engagement in 2019-2020, numerous business and property owners in Punjabi Market identified the need for better business-to-business connections, collaboration, and retail planning. The City heard from many individuals expressing a desire for better local and regional positioning of Punjabi Market, and for the City to provide support for envisioning the future of the Market.

This report informs the City and Punjabi Market business owners on the future viability of the Market as a South Asian focused commercial street, explores organizational structures that can support future viability, and outlines a retail strategy based on the Consultant team's background scan and engagement with business owners.

Findings

Successful traditional retail main streets all feature common structural design characteristics. Punjabi Market has the right foundation from which to create a great public realm and build pedestrian traffic, however, there is significant work and investment that must be undertaken to achieve this.

- There are opportunities and interventions that could further enhance the physical street for the benefit of the commercial operators. This could include, but not limited to:
 - Traffic calming and potentially flashing beacons at the pedestrian crossing at Main Street and E 50th Avenue.
 - More seating and places to linger, such as parklets and plazas / seating areas.
 - Longer term consideration of more sidewalk and curb activation through food vendors and patios.
 - A coordinated approach to general beautification such as planters and lighting.
- Some of these interventions would be the purview of the City and some would have more to do with individual storeowners and others might be a collaboration between the City and a future business organization.

Punjabi Market is small in the context of other shopping streets and the South Asian offering in Surrey. The small size provides opportunities and challenges.

- Little India Plaza and Payal Business Centre at 128 St. and 80 Ave. in Surrey have more than 350 South Asian oriented stores and services combined.
- Without a strong South Asian orientation, Punjabi Market's relatively small size will likely limit its potential beyond a collection of miscellaneous retailers and services, thereby making it challenging to generate pedestrian traffic.
- On the other hand, strengthening the South Asian orientation and creating a specialized destination is easier for Punjabi Market as South Asian uses are located closer to each other and can create economies of agglomeration.
- There is significant concentration of retail commercial space within a 5-minute drive of Punjabi Market. These concentrations are larger than Punjabi Market and provide many day-to-day convenience items.

- The competitive cluster analysis indicates that there are opportunities in the surrounding shopping streets to fulfill the daily and weekly needs of the surrounding community.

Currently, Punjabi Market is considered a viable commercial main street. There is an opportunity to build on this viability for future growth.

- The vacancy rate has decreased from approximately 14% in 2017 to a healthy current level of 5.4%. Typical vacancy rates for ‘healthy’ main streets are between 5.0% – 7.5%.
- Some of the retailers have been in operation for decades, which provides an endorsement of the viability.
- The quality of some of the national tenants is an indication of the quality of the location and access. For example, retailers and service providers such as Tim Hortons and RBC have extensive site selection criteria as well as lengthy leases. The fact that they have chosen this area is an endorsement of the current and future viability of the area.

Despite the commercial viability, Main Street’s commercial positioning as “Punjabi Market” is declining.

- Currently, of the 102,000 square feet of ground floor commercial, 42,000 or 41% of the commercial space is South Asian oriented. Examined in another way, of the 75 ground floor commercial units, 30, or 40%, are South Asian oriented.
- There is quantitative evidence that the South Asian orientation of Punjabi Market has decreased significantly. In 1998 there were 20 South Asian fashion stores, a decade later there were 21, in 2017 this number decreased to 9 and in 2023 that number has decreased to 5.²
- There is anecdotal evidence that some of the existing South Asian stores that have been operating for 20+ years will also close for good in the next 5+ years owing to retirement and a lack of interest from younger generation to operate the retail store.

² Historical data taken from “Punjabi Market Retail Business Study, Findings and Next Steps (April 2018). South Asian fashion stores along with South Asian food and beverage stores are the mainstay of South Asian retail nodes.

Despite, the fact that the South Asian commercial positioning is declining, the attention paid to the cultural aspects of Punjabi Market are on the ascent.

- While new festivals and activities – work advanced by the Punjabi Market Collective – have helped to bring attention to the Market, the retail environment continues to change.
- Punjabi Market could be described as a cultural district. It is important to note that the basis for this cultural district is the retail main street. For many cultural districts, including Punjabi Market, there is a general consensus that the local main street retail that uplifts the cultural identity of the community is one of the defining characteristics of cultural districts. Without the retail, the cultural district would cease to exist in a way that everyday citizens can interact with.
- Therefore, while the work being done by Punjabi Market Collective is an important part in strengthening, re-introducing, and enhancing the cultural identity of Punjabi Market, there needs to be an equal if not greater commitment by the retailers and property owners to reverse the current decline of the South Asian orientation of the retail component of the street.

It is the opinion of the Consultant Team that the potential exists for a revitalization of Punjabi Market.

- Any revitalization attempt will require intentional curation and significant attention to the retail tenant mix, retailer operations, retailer experience and public realm.
- Furthermore, given the competition and range of comparison shopping opportunities in Surrey, the revitalization of Punjabi Market should not be viewed as an opportunity to compete with Surrey. For example, there is likely no scenario where customers looking for bridal wear would choose to shop at Punjabi Market versus in Surrey.
- Rather, Punjabi Market requires a “unique selling proposition” to attract visitors. For example, Punjabi Market could be a unique food destination with an arts and culture focus. This would appeal to a broader customer base than just the South Asian population. In other words, while its history is important it needs more than its history to be viable in the future.

- As described in the previous section, this does not (and should not) preclude non-South Asian retail and services. However, any retail or service tenant in the Market should have a role in driving traffic to the Market.
- Beyond the broad appeal of food, there is also an opportunity to broaden the general appeal of Punjabi Market to a wider non-South Asian market. The South Asian offerings in Surrey appeal mostly to a South Asian population. Navigating the large number of South Asian stores and services, especially restaurants, can be intimidating to non South Asians. Punjabi Market has the opportunity to provide a more accessible South Asian experience with a curated approach.

Various business owner consultations were conducted as part of this study.

- Consultation with Punjabi Market business owners revealed other reflections around factors impacting revitalization including the impact of new residential buildings, a generational difference in optimism for the future of the Market (e.g. newer businesses feel more hopeful), and variation in the potential for businesses to be passed onto the next generation.
- Consultation with business owners indicated broad support for an organizational structure and varying opinions for the preferred structure. Business owners also highlighted different priority needs that a structure could help address including mutual support, cultural programming, and creating a more distinctive market feel.

There three main types of organizational structures that could potentially assist and facilitate the revitalization of Punjabi Market.

- A Business Improvement Area (BIA) is a non-profit association of businesses and property owners where all commercial properties/businesses in the area must pay a levy to fund "business promotion" activities. The City of Vancouver currently has 22 BIAs.
- A merchants association is a non-profit association of businesses funded by the membership fees of businesses that choose to become members. Examples include Steveston Merchants Association and Vancouver Chinatown Merchants Association. It should be noted that Punjabi Market

also had a merchants association which we understand is no longer active.

- A cultural organization is typically a non-profit, that has a specific cultural mandate. An example of a cultural organization would be Punjabi Market Collective (PMC).

Recommendations

Based on the background research, consultation, professional expertise and our understanding of the opportunities and limitations of each of the organizational structures and the nature of the revitalization required and the tools required, it is the opinion of TER that a BIA would be the most appropriate type of organizational structure to steward Punjabi Market and more specifically Punjabi Market businesses through a revitalization.

- The future of Punjabi Market as a South Asian oriented market hinges on attracting and curating more South Asian businesses. The role of a BIA is to specifically assist with business success. It can play a role in attracting new South Asian entrepreneurs, and assist in curating the overall 'mix' of all businesses.
- The South Asian orientation and the associated cultural visibility is valued by business owners. The mission of a BIA is dictated by its members which consist of business owners and property owners. Therefore, it is possible to be specific about the outcomes of a BIA.
- There is consensus that the South Asian orientation of the Market is declining. Consultations with business owners has also revealed that some key business owners will be retiring in the next 5+ years. Without a specific strategy, this decline is expected to continue. A BIA would be able to implement this strategy.
- The overall retail business environment is challenging, and a BIA can provide business specific supports to mitigate these challenges.
- There are two residential mixed-use buildings planned for Punjabi Market, each with ground floor commercial. A BIA is a conduit to the City and can advocate for the business and property owners' positions at the City.
- A BIA has access to a network of other BIAs across the City which is invaluable in terms of best practices implementation.

A retail strategy can support implementing a specific vision for a commercial area through a unified vision and coordinated efforts among business owners. For a main street like Punjabi Market, a retail strategy may be needed when circumstances require reinforcing specialization and revitalization. Without a retail strategy, the consultant team believes the Punjabi Market will evolve away from its South Asian orientation.

- The consultant team proposes a comprehensive retail strategy that outlines influencing the tenant mix, short and medium term actions to enhance the physical and financial attractiveness of the Market, and overall supporting the revitalization of Punjabi Market's South Asian orientation.
- Actions can include marketing, public realm improvements, cultural programming, strategies to influence tenant mix, and direct engagement with South Asian retailers. The retail strategy is formulated for business and property owners to support them in decision making about Punjabi Market or organizing an organizational entity like a BIA.
- Collaboration will also be an integral part of the strategy, including relationships among business owners and with cultural organizations, specifically Punjabi Market Collective and the City.

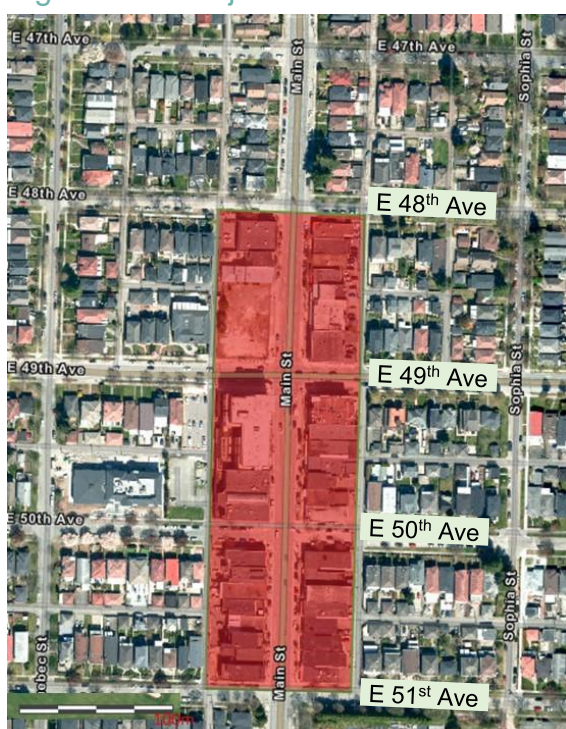
1 Introduction

Tate Economic Research Inc. (“TER”) in association with Divercities Advisory Inc. and Roots and Rivers Consulting (“Consultant Team”) is pleased to provide this Commercial Area Capacity Building Work for the Punjabi Market in the City of Vancouver.

1.1 A Brief History of Punjabi Market

In the 1960s, Canadian immigration policies changed, which led an influx of immigrants from China, India, Korea, the Philippines and Vietnam. The Sunset area, in particular, saw a number of immigrants from Punjab (India) who joined with other members of Vancouver’s existing South Asian community in settling in this south Vancouver neighbourhood. Among these were the entrepreneurs who set up shop in the existing retail area along Main Street. The first Punjabi business opened its doors in May 1970, and one year later there were a trio of shops. From there, the Market grew steadily to being an epicentre for South

Figure 1-1: Punjabi Market



Source: Tate Economic Research Inc.

Asian business, social and cultural life in both the city and region.³

Today, Punjabi Market is defined in City policy documents as the three commercial blocks along Main Street between E 48th Avenue and E 51st Avenue. Currently there are 75 ground floor commercial businesses in Punjabi Market with 30 stores, or 40%, providing South Asian goods and services.

For over half a century, Punjabi Market (“the Market”) has represented an important cultural and commercial hub for Vancouver’s South Asian communities. Over this period, the South Asian commercial environment

³ City of Vancouver Memo RTS# 13413 Punjabi Market – Celebrating the Past, Envisioning the Future – Update & Next Steps

has undergone significant changes, raising several questions about the future market viability of Punjabi Market as a South Asian oriented main street.

As an example of the overall decline and concern over the future viability, in 2008 there were 21 South Asian fashion stores, by 2017 this number had decreased to 9 and in 2023 that number has decreased to 5.⁴

In addition, rezoning applications in 2016, and other, more recent development applications, have spurred questions about the future of the Market, and the nature of change.

1.2 City of Vancouver Council Motions Context

In response to concerns related to the future viability of Punjabi Market, several City of Vancouver Council motions have been passed in 2016, 2019 and 2022. A summary of the directions with respect to Punjabi Market in response to Vancouver Council motions include:

2016 – Council directed staff to:

1. Examine Chapter 23 (“Main Street Shopping Area/Punjabi Market”) of the Sunset Community Vision and research whether updates are required, and any subsequent consultations as required to be reported back to Council for consideration.

2019 – Council directed staff to:

1. Identify public realm opportunities and other “quick wins” that could be delivered in advance of the 50th anniversary.
2. Create a collaborative community process to imagine the future of the Market.
3. Work with the Park Board, School Board, provincial and federal governments, and local First Nations to advance opportunities in the Market.
4. Apply a diversity, equity, and inclusion lens to this work.

⁴ Historical data taken from “Punjabi Market Retail Business Study, Findings and Next Steps (April 2018). South Asian fashion stores along with South Asian food and beverage stores are the mainstay of South Asian retail nodes.

2022 – Council directed staff to:

1. Explore and provide policy recommendations for protecting and promoting cultural food assets and other forms of intangible cultural heritage across the city.
2. Develop protections for cultural food assets and other form of intangible cultural heritage within the redevelopment process.
3. Develop mechanisms for identifying and protecting significant cultural assets through cultural zones or districts, cultural land trusts, or a special cultural program that is accessible city-wide.

These actions have targeted a broad range of outcomes but can generally be categorized within two areas:

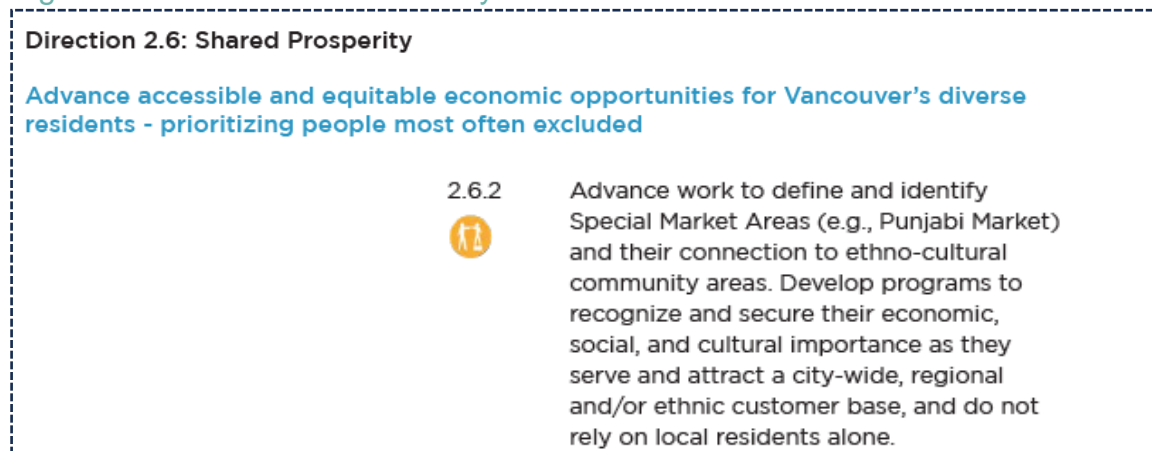
- Cultural Supports – research and actions around maintaining and enhancing the cultural identity of Punjabi Market.
- Business Supports – research and actions around strengthening the businesses in Punjabi Market.

These two areas are not mutually exclusive. In fact, the cultural and business functions of the Punjabi Market rely on each other and have a synergistic relationship.

1.3 Policy Context: Vancouver Plan

The recently adopted Vancouver Plan, the City's long-term strategy for growth and change, has a specific policy relating to Punjabi Market and other similar areas:

Figure 1-2: Vancouver Plan Policy



The Vancouver Plan references “economic, social and cultural” functions. This report aims to further the development of programs to support the *economic* importance of Punjabi Market within the social and cultural context.

1.4 Mandate

During the City’s Punjabi Market community engagement in 2019-2020, numerous business and property owners in Punjabi Market identified the need for better business-to-business connections, collaboration, and retail planning. The City heard from many individuals expressing a desire for better local and regional positioning of Punjabi Market, and for the City to provide support for envisioning the future of the Market.

TER was retained by the City of Vancouver to support City and community efforts related to the renewal and regeneration of Punjabi Market with a particular focus on the commercially zoned properties.

This report is intended to inform various City of Vancouver departments (Community Planning, Engineering Services, Arts Culture and Community Services (ACCS)), Punjabi Market business operators and owners and property owners on the following:

- The future market viability of Punjabi Market as a commercial main street.
- The future market viability of Punjabi Market as a South Asian focused commercial main street.
- The available options in terms of creating an organizational structure for enhancing the market viability of the businesses in Punjabi Market.
- An initial commercial strategy based on the Consultant Team’s expertise and the feedback received from business owners and operators as well as property owners through the various consultations. This strategy provides recommendations on how the main street function can be strengthened.

This report builds on previous work undertaken within the Market including, but not limited to, the following:

- Retail Study of Punjabi Market (2017)
- Merchant Drop In Consultations (October 2019)
- Community Wide Consultations (October / November 2019)

- Community Wide Consultations (January 2020)
- Draft Visitation Market Study Punjabi Market (2023)

1.5 RFP Deliverables and Work Scope

In order to undertake the mandate, the Consultant Team was tasked with undertaking the following:

1. Creating a Background/Area Profile outlining details of the Market's retail/service environment, trade area and customer base, and local/regional competition. This work will also involve the analysis of business mix by category, a gap analysis of businesses, and the identification of desired commercial and non-commercial uses of storefront spaces.
2. Developing a Strategic Plan and related components for improving commercial area vibrancy, competitiveness, and resiliency, including:
 - Placemaking, public realm, and tenant intervention opportunities.
 - A commercial strategy, retail service mix program, and 5-year activity plan.
 - A retention and recruitment strategy for Punjabi Market businesses, property owners, leasing agents, potential tenants and others.
3. Identifying a recommended business organization or structure to support the implementation of the strategic plan, as well as the long-term collective work of business-owners, property owners, and community stakeholders.

It should be noted that the Consultant Team, in consultation with the City of Vancouver, deviated from the phasing of the specific steps originally outlined by the City, however, the intent and final deliverables are consistent with the City's objectives for this project.

1.6 Concordance with RFP Mandate and Report Structure

Table 1-1, on the following page, illustrates the structure of this report and the concordance with the RFP deliverables.

Table 1-1: Report Chapters and RFP Concordance

Report Chapter	RFP Concordance
Chapter 2 - The Punjabi Market Commercial Context	Create a Background / Area Profile
Chapter 3 - The Future Viability for Punjabi Market	Create a Background / Area Profile
Chapter 4 - Cultural Placekeeping and Retail	Develop a Strategic Plan
Chapter 5 - Potential Organizations to Guide Revitalization	Identify a Recommended Business Organization and Structure
Chapter 6 - Retail Strategy	Develop a Strategic Plan

1.7 Caveat

This report should be reviewed considering these basic assumptions:

- This report provides an organizational entity recommendation for the merchants and property owners of Punjabi Market. This is a recommendation only. Ultimately, the merchants and property owners are the only people that can make the decision regarding the most appropriate organizational entity.
- This report utilizes primary and secondary data sources. The primary data represents a “snapshot in time”. Should the main input data change significantly from when collected, the Consultant Team reserves the right to adjust the findings.
- This work, and its engagement, builds on earlier work. The level of direct input was challenging this time. Merchants noted that they felt like they were not seeing enough action (or were over engaged). This report responds to that by presenting a course of action based on the over fifty years of combined experience developing retail strategies within TER’s senior leadership.
- This report recognizes the cultural significance of Punjabi Market to the South Asian and in particular the Punjabi community. Any recommendations in this report should be viewed through the lens of protecting the cultural heritage. However, there may be instances where enhancing retail viability could introduce trade-offs or come at the expense of protecting cultural heritage. Therefore, in order to strike a balance between potentially different perspectives, consideration should be given to priorities of the community, business and property owners when making such decisions.
- This report is intended for the uses outlined in the mandate. No parts of this report may be replicated or used for purposes other than that stated in the mandate without the written consent of Tate Economic Research Inc.

2 The Punjabi Market Commercial Context

Punjabi Market is a commercial main street. There are different types of main streets that appeal to different users. However, the one universal requirement, regardless of street type, is the requirement for customer traffic to generate sales. This section of the report examines the various characteristics of Punjabi Market and how these characteristics impact the current market viability of the Market.

2.1 Types of Main Streets

Table 2-1, provides a sample of the different types of main streets. It is important to note that a single main street can exhibit characteristics of multiple types. Furthermore, main streets evolve due to changes in the local economy, surrounding socio-economic characteristics and competition.

Table 2-1: Different Types of Main Streets

Downtown Main Streets	Historic Main Streets
Neighborhood Main Streets	LGBTQ+ Districts
Suburban Main Streets	Industrial Revitalization Districts
Entertainment Districts	Ethnic and Cultural Streets
Waterfront or Harbourfront Districts	Fashion and Design Districts
Tourist Main Streets	Food and Culinary Districts

Source: Tate Economic Research Inc. See Appendix A for a more detailed description of the types of Main Streets.

The following observations are made with respect to how Punjabi Market fits into this main street typology:

- At its most basic, Punjabi Market is a commercial main street with a South Asian business orientation that holds cultural significance within the immediate and greater Vancouver South Asian, specifically Punjabi, community.
- Based on the main street typologies in Table 2-1, Punjabi Market exhibits characteristic of Neighborhood Main Streets and Ethnic and Cultural Streets.

Figure 2-1: Punjabi Market Main Street Characteristics



- It should be noted that similar Ethnic and Cultural streets/districts such as Gerrard India Bazaar (Little India) in Toronto and Chinatown in Vancouver also act as Tourist Main Streets and Food and Culinary Districts.
- In the past, Punjabi Market would have also functioned to a greater degree as a Tourist Main Street and Fashion and Design District for the South Asian diaspora in Greater Vancouver and beyond.

2.2 Physical Characteristics of Successful Main Streets

Successful traditional retail main streets all feature common structural design characteristics. Table 2-2 examines some of the generic attributes of successful main streets:

Table 2-2: Physical Attributes of Main Streets

Block Spacing	Parking and Accessibility
Door Spacing	Building Facades
Street Width	Building Scale & Proportions
Sidewalk Width	Public Space

Source: Tate Economic Research Inc. See Appendix A for a more detailed description of the attributes.

The following observations are made with respect to how these attributes are represented in Punjabi Market:

- Generally, Punjabi Market has the appropriate “building blocks” for a vibrant main street.

Block Spacing

- Each of the three blocks of the Market is around 100 metres long. This “block spacing” allows for:
 - The ability to have corner retail units such as Himalaya Restaurant and Tim Hortons which draw consumers from perpendicular streets onto the Main Street.
 - Allows for a level of permeability from the surrounding neighbourhoods. For example, you can “enter” Punjabi Market from E 48th, E 49th, E 50th or E 51st Avenues as well as Main St.
 - Blocks result in intersections which allow pedestrians to cross the street.
- Conversely, at three blocks, the overall size of the Market is small. Many of the successful main streets in Vancouver are approximately 10 blocks or more. As residential intensification opportunities arise, there may be opportunities to expand the commercial market through ground floor commercial in mixed-use buildings.
- In addition, despite an appropriate block spacing, the only practical places to cross the Main Street is at the signalized intersection at E 49th Avenue and E 51st Avenue. Due to the speed of vehicles, the pedestrian crossing at E 50th Avenue is not heavily used.

Door Spacing

- For the most part there is a continuous commercial façade for the three blocks of Punjabi Market. The door spacing along the blocks is appropriate with few, if any, large store frontages.
- Given the right tenant mix, as well as other factors discussed in this section, appropriate door spacing will encourage shoppers to continue to explore the adjacent shops. Appropriate door spacing also allows for street animation through window displays.

Street Width / Sidewalk Width

- The street width in Punjabi Market is approximately 26 metres store face to store face. This is much wider than typical successful main street widths

which are approximately 5 to 10 metres. This condition limits the benefits of a double loaded retail main street in Punjabi Market.

- Conversely, the wide street width allows for interventions such as widening sidewalks for patios and food vendors, more street for pedestrian events and curbside patios as well as other options such as food trucks.
- These interventions could also act as traffic calming measures as the wide street also leads to high traffic speed. Vehicular traffic travels at a high speed along Main Street and does not lead to an intimate environment that encourages visitors to explore both sides of the street.
- It is our understanding that, with the exception of events, the larger width has not been taken advantage of.

Parking & Transit

- Punjabi Market is generally auto-oriented. In addition to free curbside parking there is a paid surface parking lot behind the mixed use building at E 49th Ave. and Main Street. Field observations do not indicate that parking is currently an issue.
- There are two bus routes, one on Main Street and another on E 49th Ave that serve Punjabi Market.

Building Scale and Facades

- The scale of building on a main street has an influence on many factors including the “feel” of the street.
- The scale of building in Punjabi Market is appropriate. The building mainly consists of typical 2 storey commercial building resulting in a street that doesn’t feel overwhelming. The existing mixed use building at E 49th Ave. and Main St. and the other two currently proposed are all 6 storeys. These types of low rise building help to frame the street and will not detract from the feel of the street.
- A physically attractive shopping environment is critical to factors such as dwell time (i.e. how long do you stay at a property or in this case in Punjabi Market). The shopping environment in Punjabi Market is dated. The building facades portray a lack of investment which is further amplified by the lack of street appeal due to the ‘tired’ window displays.

Public Space

- Public space such as benches, seating areas and parklets help with the aforementioned shopping environment and dwell time.
- Punjabi Market has the standard benches but little else that would cause or support a shopper to linger and enjoy the shopping experience.
- There are banners and murals which do help define the area and provide a level of interest, however, from a strictly shopper attraction perspective these provide marginal gains. It is our understanding that the City is working on supporting the development of a 'welcome feature'.

The sum of the above factors is that while Punjabi Market has the right foundation from which to create a great public realm and build pedestrian traffic, there is significant work and investment that must be undertaken to achieve this.

2.3 Main Street Tenant Mix Attributes

For the most part, main streets evolve organically. The tenant mix on individual blocks is usually a result of one or two anchor tenants attracting other tenants who want to be in proximity to those anchors. There are also other tenants who are not looking for synergies and are there simply because the rent and space is appropriate or the surrounding demographics suit them.

Unlike a shopping centre where the owner can choose specific tenants, a main street must rely on the overall vision and feel of the street as well as its historical reputation to attract certain retailers. Over time, these areas become synonymous with a certain type of retailer.

As illustrated in Table 2-3, a tenant mix with a number of cross synergies is essential for creating a thriving and attractive main street that benefits businesses, residents, and the overall community.

Table 2-3: Benefits of a Synergistic Tenant Mix

Foot Traffic and Customer Attraction	Economic Resilience
Vibrancy and Atmosphere	Enhanced Customer Experience
Reduced Vacancies	Attraction for Investors and Developers
Synergy and Cross-Promotion	Cultural and Social Benefits

Source: Tate Economic Research Inc. See Appendix A for a more detailed description of the attributes.

By ensuring the retail and service space reflects the vision or function of the main street, it can become a destination that offers something for everyone, ultimately leading to its long-term success and sustainability.

2.3.1 General Tenant Mix

This section and Figures 2-3 and 2-4 examine the general tenant mix.

- There is 102,090 square feet of Ground floor commercial space in Punjabi Market. Of this space, 5,550 square feet is vacant. This equates to a vacancy rate of 5.4%. Typical vacancy rates on healthy commercial main streets are between 5.0% to 7.5% and therefore, Punjabi Market is currently within the normal range.⁵
- When looking at the overall tenant mix, retail space (i.e., stores that sell goods) accounts for 43.3% of the total ground floor commercial space, services account for 51.3% with the balance made up of vacant space. In areas where there is comparison shopping (i.e. Robson Street) the percentage of retail space is much higher. Typically in enclosed shopping malls the retail space is approximately 80%. The retail comparison shopping is what drives a regional draw and contributes to dwell time as shoppers visit multiple stores to compare goods (typically clothing). Generally, in all types of shopping areas there has been a shift toward more service types of uses (i.e. personal service, health clubs, quick service restaurants). Often the service to retail ratio is 60/40 and can be as high as 80/20 which is mostly a function of food and beverage establishments. A high service to retail ratio is not a negative as it generates local visitation, however, these visits are typically one stop visits and do not lead to increased pedestrian traffic and dwell times. Therefore, despite the decline in retail

Figure 2-2: Destination vs. Convenience

Destination retailers provide “higher order” goods and services. These goods and services are purchased infrequently. These retailers draw shoppers from a larger trade area or, conversely, shoppers are willing to travel longer distances to shop at these stores. Specialty / destination retailers are in regional centres or specialized main streets, which are smaller in number and spaced further apart.

Convenience retailers provide “lower order” goods and services. These goods and services are purchased frequently and are more common in nature. Generally, from a retail supply perspective, convenience / local retailers are located in strip plazas and neighbourhood and community sized centres, are more common in number and are near residential population for ease of access.

⁵ TER conducted a complete inventory of ground floor retail and service space in Punjabi Market in April 2023. These observations are based on that inventory.

space, the current amount of retail space in Punjabi Market at 43.3% is a positive and can be built upon to increase destination shopping.

- The retail and service mix can be further broken down into destination and convenience stores. There is a mix of convenience, destination and stores that function as both destination and convenience. Typically, this mix of stores results in support from the local community as well as support from a more regional base. This is also true of Punjabi Market which, according to mobility data, has a loyal local following and as well as broad regional draw.⁶ This regional draw is likely a function of the jewellery stores which have a loyal customer base.
- In terms of retail vs. services proportions, the tenant mix is balanced. However, within each category there are gaps within the sub-categories:
 - Within the retail category there is a lack of home goods stores and specialty food stores. Stores such as Punjabi Food Centre and Persia Food Produce Markets, cater to daily and weekly shopping. There are a lack of specialty stores such as gelato and pastries.
 - There are other gaps in the retail category such as a full service pharmacy (i.e., Shoppers Drug Mart), however there are a number of pharmacies within a 5-minute drive time which would likely preclude one from this location.
 - Within the service category, there are a number of quick service restaurants (QSR's) but there is a lack of full service sit down restaurants.

2.3.2 Punjabi Market South Asian Focus

By the nature of its name, the expectation is that Punjabi Market should have a significant South Asian focus. For the purpose of this analysis, "South Asian Focus" relates to stores that sell goods and services that are either marketed to the South Asian population or goods and services that are South Asian in nature. The following observations are made about the South Asian focus and are illustrated in Figure 2-5:

- Of the 102,000 square feet of ground floor commercial, 42,000 or 41% of the commercial space is South Asian oriented.

⁶ Draft Visitation Market Study Punjabi Market (2023), 360 Collective

- Examined in another way, of the 75 ground floor commercial units, 30, or 40%, are South Asian oriented.
- Of note is that there are nine jewellery stores and five clothing and accessory stores in Punjabi Market. All of these stores are South Asian oriented.
- The main concentration of South Asian stores is on the east side of Main Street between E 49th Ave and E 50th Ave.
- Many of the existing South Asian stores are long-standing, having been in the Market for years, even decades.

Figure 2-3: Punjabi Market Vacant Units and Development Sites



102,090

Square Feet of Occupied & Vacant Ground Floor Space

5,550

Square Feet of Vacant Space

5.4

% Vacancy Rate

75

Ground Floor Commercial Units

7


Vacant Units

9

% of stores are vacant

2

Development Sites

 Vacant Stores

 Vacant Land

Less than half of the stores and associated square footage represent a South Asian focus. There is no benchmark number of stores that would indicate what the South Asian component should be. However, we can conclude that currently, Punjabi Market does not represent an attractive proposition for new South Asian oriented retailers looking to lease new space specifically in the commercial block north of E 49th Ave. based on the trend in the leasing activity and types of tenants.

2.4 The Surrounding Competitive Landscape

Punjabi Market is surrounded by a significant amount of commercial space as illustrated in Figure 2-6. This commercial space serves both a local and regional draw.

- Punjabi Market represents a very small commercial node within the context of commercial main streets in Vancouver. At 3 blocks and approximately 75 ground floor businesses it is one of the smallest main street nodes in the City.
- It should be noted that there is a significant concentration of commercial space within a 5-minute drive time of Punjabi Market. This concentration includes Fraser Street south of W 41st Avenue which is a 9 block commercial node (Sunset on Fraser BIA) comprised of 419 businesses, several of which are also South Asian focused. Fraser Street provides a more complete daily and weekly shopping environment with several grocery store options and two national chain drug stores.
- Using mobility data, an analysis was conducted of where Punjabi Market customers also shopped. As can be seen in Figure 2-8, the competitive clusters analysis indicates Punjabi Market customers also shop at retailers on Fraser Street and along Main Street. Of note is that there is enough cross shopping to identify three nodes in Surrey along 120 St. which have a strong concentration of South Asian Stores.

Within the context of this study the main conclusion is that Punjabi Market operates within a mature and competitive retail environment. There are a number of commercial concentrations, namely Fraser Street, within walking distance (or a short drive) that provide a full complement of daily and weekly convenience needs.

In addition, the mobility cluster analysis indicates that there is cross shopping between Punjabi Market and the South Asian concentrations in Surrey. It is

difficult to establish the amount of cross shopping from the cluster analysis, however, the upshot is that Punjabi Market is still viewed as a relevant shopping destination for South Asian goods and comparisons are occurring with Surrey.

Figure 2-4: Convenience vs Destination Stores and Active Store Fronts



Source: Tate Economic Research Inc., based on data collected in April 2023

Figure 2-5: South Asian Orientation



102

Thousand Square Feet of Occupied & Vacant Ground Floor Space

42

Thousand Square Feet of South Asian Oriented Retail and Services

41

% of Square Feet is South Asian Oriented

75

Ground Floor Commercial Units

30

Stores are South Asian Oriented

40

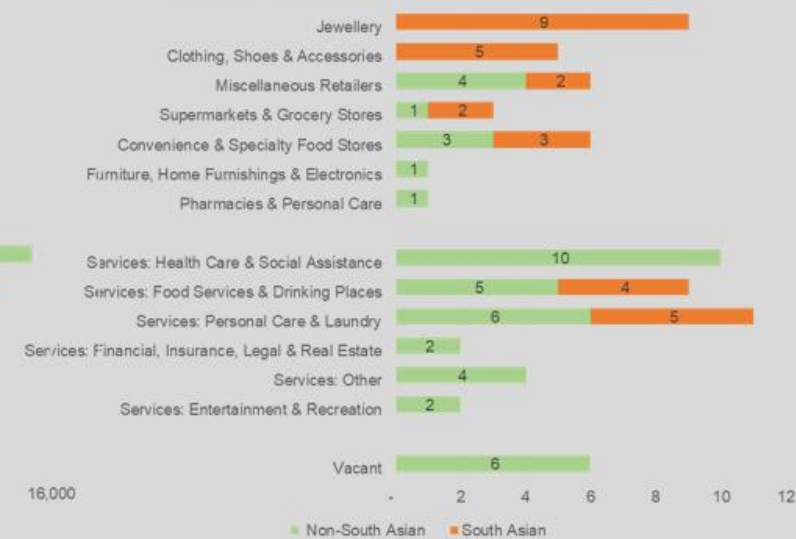
% of Stores are South Asian Oriented

South Asian vs. Non-South Asian Oriented (sq. ft.)



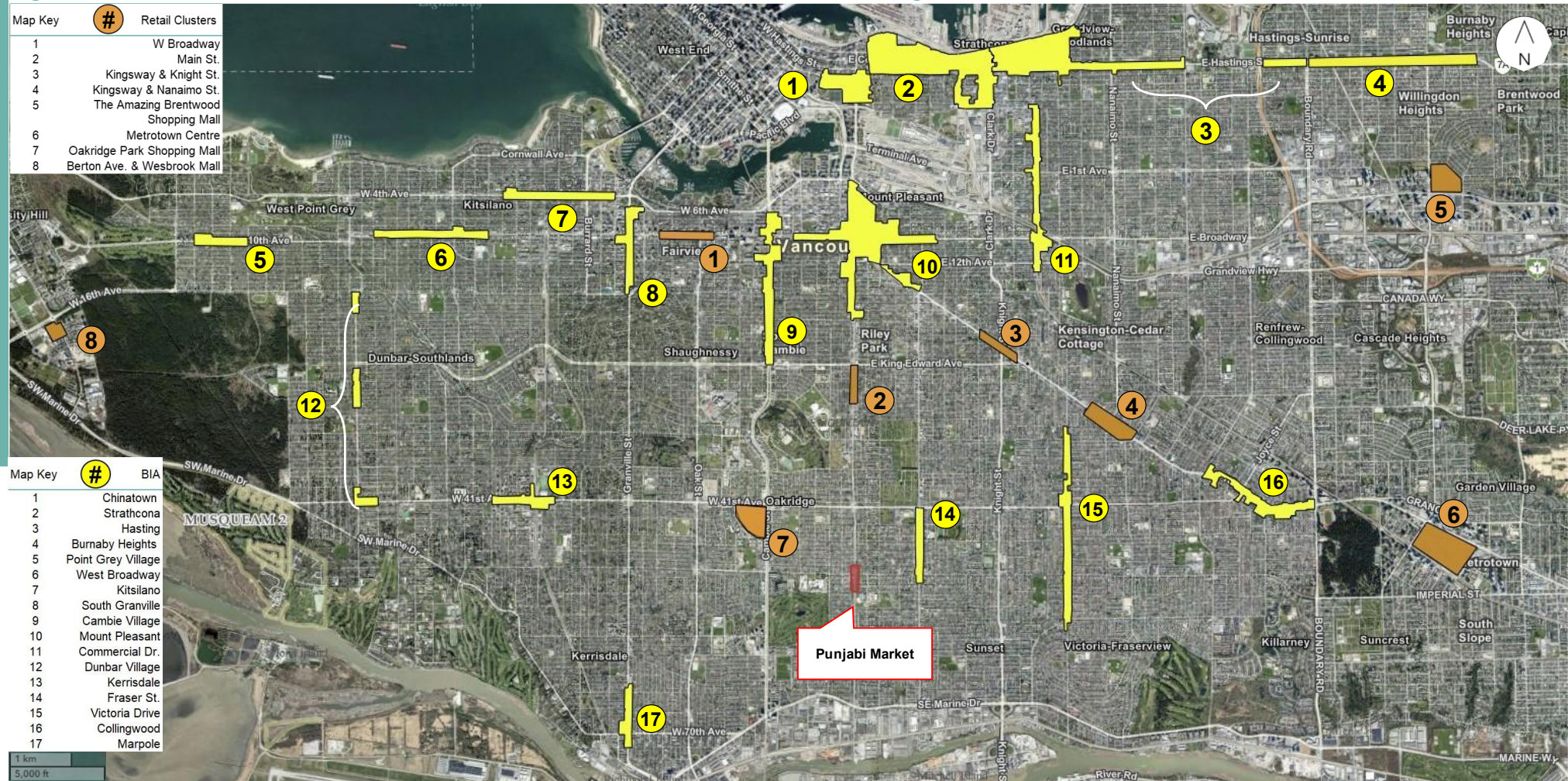
South Asian Oriented Stores

South Asian vs. Non-South Asian Oriented (# of units)



Source: Tate Economic Research Inc., based on data collected in April 2023

Figure 2-6: Estimated Number of Ground Floor Business and Blocks in Surrounding BIAs and Other Identified Commercial Concentrations



Source: Tate Economic Research Inc.

Retail Commercial Businesses Within a 10 Minute Walk Time

Source: Tate Economic Research Inc. Data from ArcGIS Business Analyst

Retail Commercial Businesses Within a 5 Minute Drive Time

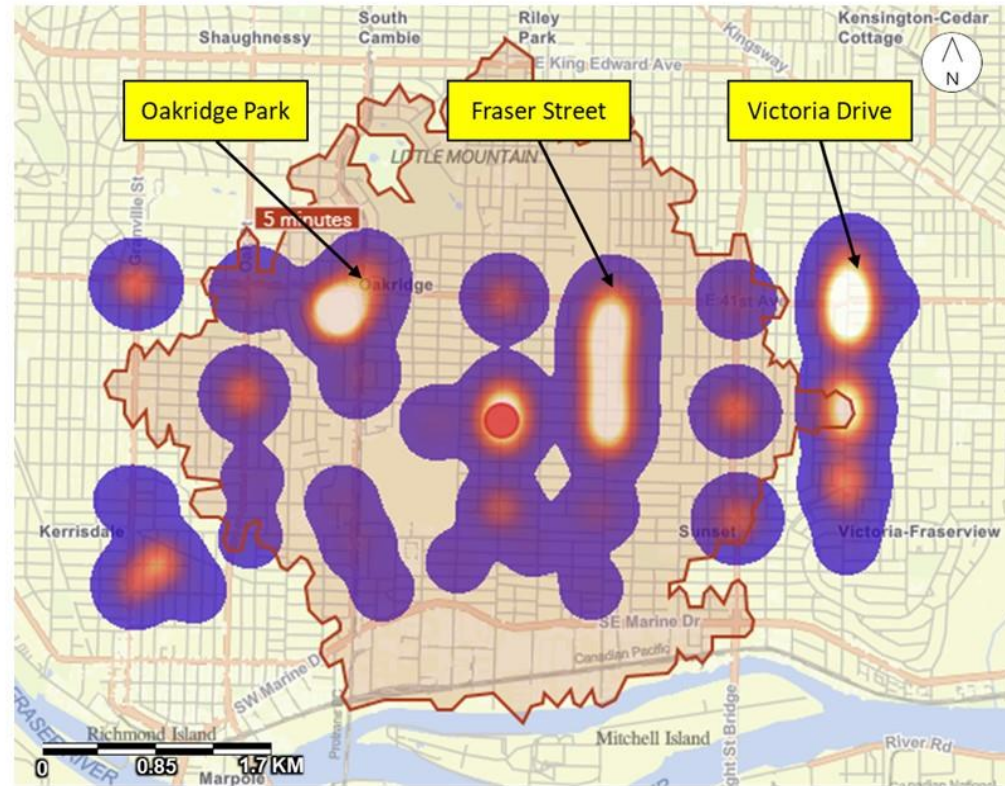
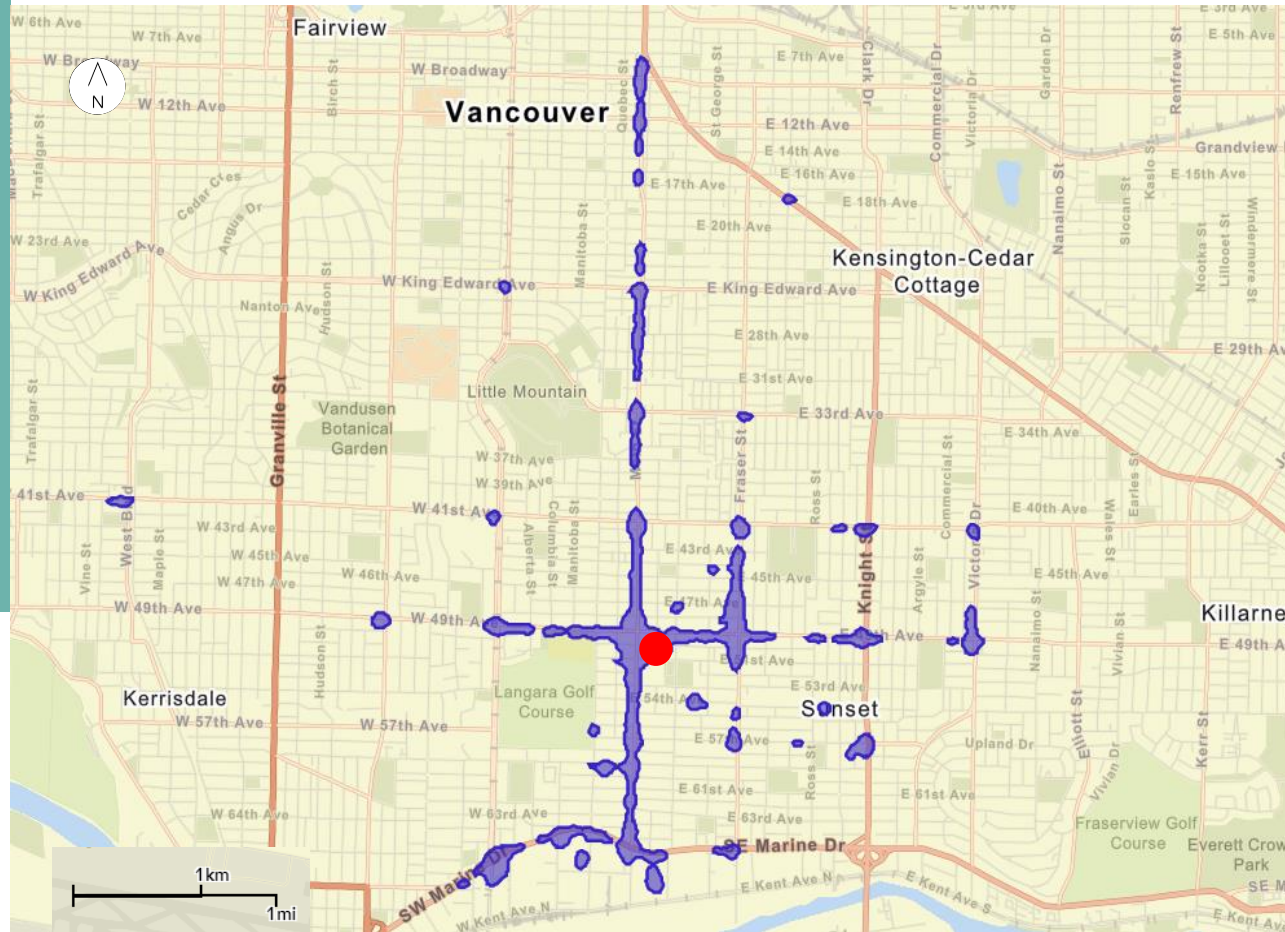


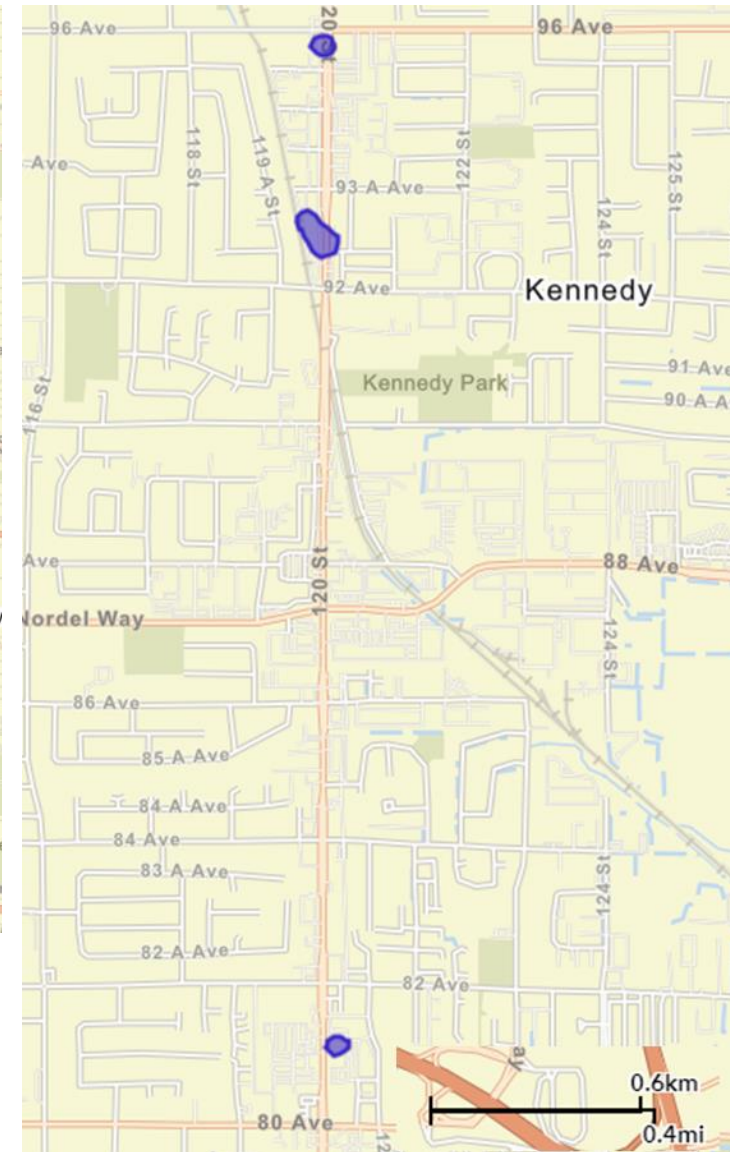
Figure 2-8: Competitive Clusters Based on Mobility Data

Clusters Identified in the Surrounding Area



Source: Tate Economic Research Inc. Competitive Cluster Report map from NEAR data. The cluster report is a specialized pathing report which attempts to algorithmically identify popular stopping points for devices on their way to and from study polygons. In this instance, a polygon was drawn along a block in Punjabi Market and the clusters are popular stopping points for the visitors in the Punjabi Market block. This data is from May 2022 to May 2023. We note that Oakridge Centre mall (Cambie and 41st) was being redeveloped during this time, and thus would not register in the analysis undertaken.

Clusters Identified Along 120 Street in Surrey



2.5 Phase 1 - Business Owner Consultation

As part of consultations of the Punjabi Market Capacity Building work, Roots & Rivers Consulting engaged in 2 days of walk-in semi-structured interviews with business owners in the Punjabi Market to understand their experiences in the Market, changes observed, and expectations and hopes they have for the future. A total of 14 interviews were conducted. A detailed summary memo is included in Appendix B. The following is a brief summary with respect to business owner perceptions of the current environment in which Punjabi Market operates:

- The South Asian orientation of Punjabi Market was noted as important to the Market from a retail and social connections context.
- It was generally observed that businesses, especially clothing stores, had left Punjabi Market for locations in Surrey, Langley and Abbotsford. There is a corresponding increase in non-Punjabi businesses.
- Foot traffic has decreased.
- The younger generations are shifting towards online retailing.
- There is a more culturally diverse customer base.

It should be noted that participation from Punjabi Market businesses was challenging despite going business to business. Overall, the Consultant Team had hoped for more participation from Punjabi Market businesses.

The overall take away from the Phase 1 consultation is a reinforcement of conclusions from the work done previously by other consultants and the City. Namely the Market plays an important cultural role however it's in decline. While there was no single consensus as to the reason for decline, the general sense was that competition and a lack of business continuity from one generation to the next were significant reasons.

2.6 The Punjabi Market Commercial Context Summary

The following observations are made with respect to the Punjabi Market commercial context:

- There are opportunities and interventions that could further enhance the physical street for the benefit of the commercial operators. This could include, but not limited to:

- Traffic calming and potentially flashing beacons at the pedestrian crossing at Main Street and E 50th Avenue.⁷
- More seating and places to linger, such as parklets and plazas / seating areas.
- Longer term consideration of more sidewalk and curb activation through food vendors and patios.
- A coordinated approach to general beautification such as planters and lighting.
- Some of these interventions would be the purview of the City and some would have more to do with individual storeowners and others might be a collaboration between the City and a future business organization.
- Punjabi Market is considered a viable commercial main street based on the following observations:
 - Low vacancy rate. The vacancy rate has decreased from approximately 14% in 2017 to a healthy current level of 5.4%.
 - The longevity of some of the retailers.
 - The quality of some of the national tenants. For example retailers and service providers such as Tim Hortons and RBC have extensive site selection criteria as well as lengthy leases. The fact that they have chosen this area is an endorsement of the current and future viability of the area.
 - The continued introduction of new businesses on the street.
 - The investments being made by some retailers in terms of upgrading and relocating within Main Street.
 - The local and regional draw of the retailers.

⁷ It is our understanding that a pilot project with flashing beacons at three intersections elsewhere in Vancouver was tested in 2016 and was considered successful. As of 2019, 13 intersections had flashing beacons and an additional 7 were planned in the City.

- Main Street's commercial positioning as "Punjabi Market" is declining:
 - There is quantitative evidence that the South Asian orientation of Punjabi Market has decreased significantly.
 - In 1998 there were 20 South Asian fashion stores, a decade later there were 21, in 2017 this number decreased to 9 and in 2023 that number has decreased to 5.⁸
 - The number of jewellery stores has remained consistent at 9 since 1998.
 - There is anecdotal evidence that some of the existing South Asian stores that have been operating for 20+ years will also close for good in the next 5+ years owing to retirement and a lack of interest from younger generation to operate the retail store.
- Punjabi Market's small size is both an advantage and disadvantage:
 - Without a strong South Asian orientation, Punjabi Market's relatively small size might limit its potential beyond a collection of miscellaneous retailers and services, thereby making it challenging to generate pedestrian traffic.
 - The relatively small size of Punjabi Market and the surrounding competition will also make it challenging to attract an anchor store or attraction such as a national pharmacy.
 - On the other hand, strengthening the South Asian orientation and creating a specialized destination is easier for Punjabi Market as South Asian uses are located closer to each other and can create economies of agglomeration.
- Punjabi Market is small in the context of other BIA's and the South Asian offering in Surrey. Little India Plaza and Payal Business Centre at 128 St. and 80 Ave. in Surrey have more than 350 South Asian oriented stores and services combined.

⁸ Historical data taken from "Punjabi Market Retail Business Study, Findings and Next Steps (April 2018). South Asian fashion stores along with South Asian food and beverage stores are the mainstay of South Asian retail nodes.

- There is significant concentration of retail commercial space within a 5-minute drive of Punjabi Market. These concentrations are larger than Punjabi Market and provide many day-to-day convenience items.
- The competitive cluster analysis indicates that there are opportunities to fulfill the daily and weekly needs of the surrounding community.

The next section of the report will examine whether the opportunity exists for a revitalization of Punjabi Market in the context of its South Asian orientation.

3 The Future Market Viability for Punjabi Market

Punjabi Market is viable as a commercial main street. This section of the report examines whether an opportunity exists to reverse the declining South Asian orientation.

3.1 Reasons for the Decline in the South Asian Orientation

There are many reasons for the decline in the South Asian orientation of Punjabi Market:

External Factors

- An increase in competition. Specifically the rise of Surrey as the primary destination for South Asian oriented goods and services.
- Lost opportunity to attract South Asian businesses. As an example, Fraser Street is emerging as an alternative location for South Asian businesses with a concentration of South Asian stores emerging at E 51st Ave.
- In addition there is a relatively more dispersed South Asian population in Vancouver resulting in positive demand characteristics for other areas.
- An increase in e-commerce. There are numerous South Asian direct to consumer (D2C) fashion sites including local Vancouver based on-line sites such as Desi Royale. In addition, value options such as Amazon Canada have tens of thousands of options for South Asian clothing.
- Changing consumer expectations around shopping and experience (i.e. “experiential retail” see Figures 3-1 and 3-2).

Figure 3-1: Looking Beyond the Sale

*“For a long time, retailing was the cornerstone or the foundation for placemaking. But just because you put a retail store in a certain spot doesn’t mean that all of a sudden you have a great place. Now, retail continues to struggle, and the millennial generation is demanding a more qualitative experience rather than a quantitative experience: they want places that aren’t necessarily about buying and selling, but rather about the experience of exchange between people.” ***

**ULI Placemaking

Internal Factors

- There has not been an effective, coordinated plan to mitigate the impacts of an increase in competition through differentiation. Some of these attempts include, but are not limited to:
 - The branding of the Market as “Punjabi Market” may not resonate with new South Asian retailers and service providers.
 - A lack of coordinated advertising on why Punjabi Market is a destination.
 - Overall lack of agreed-upon vision for the future of the Market.
- Individually, many retailers have not kept pace with the change in consumer expectations in terms of merchandising and general in-store experience.
- Not all property owners have invested in the upkeep of commercial properties.

Figure 3-2: The Rise of Experiential Retail

An increasing number of transactional shopping purchases are being made on-line when it is convenient to the shopper. Therefore, when a consumer goes shopping in a physical store, the expectation is for an “experience” that cannot be replicated on-line. The emergence of experiential retail is further bolstered by advances in technology which allow for stores to provide interactive experiences linked to social media platforms such as Instagram and Snapchat. In addition, the experience may be fulfilled through unique, or constantly changing offerings at retailers and interesting window displays.

Not all retailers require an experiential aspect. For example, the jewellery retailers are destinations with loyal customers that frequent those stores based on relationships. In addition, some stores have recognized the importance of attraction through window displays. In general shops and services in Punjabi Market lacks the “experiential” factor. Many of the retail operators are older and are used to a certain way of conducting business which relied on advertising and a captive market. Most window displays, signage, merchandising and marketing are dated.



- There is a lack of sit-down restaurants. It should be noted that historically, Punjabi Market has not had many restaurants. Converting a non-restaurant to restaurant space is cost prohibitive for independent restaurants.
- Based on feedback gathered during the engagement process, there may be an expectation that based on the historical significance of Punjabi Market, the City of Vancouver should do more, resulting in a lack of individual and collective ownership of the commercial future.

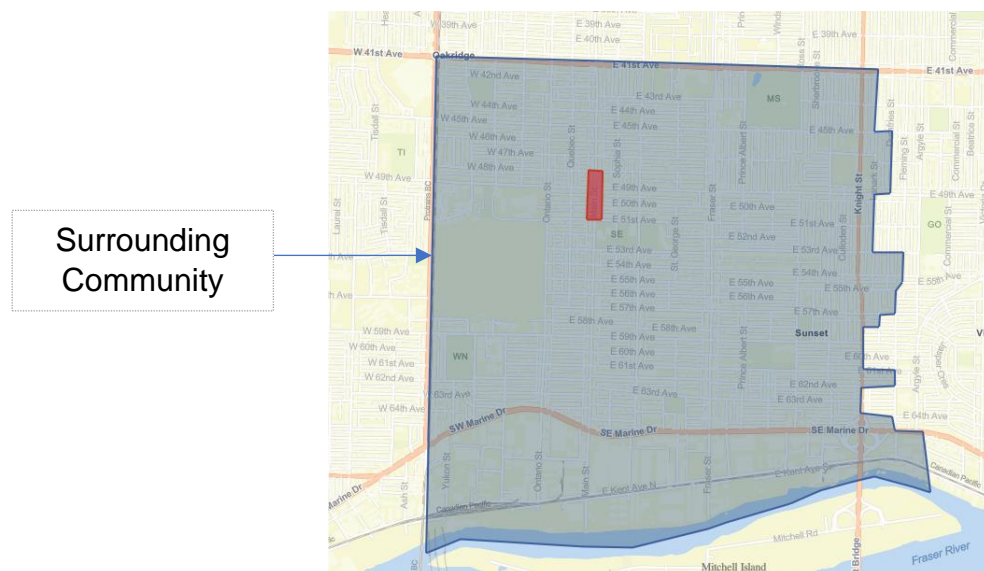
3.2 Changes in Demand Generators for South Asian Oriented Stores

This section examines whether there have been changes in the local demand generators for Punjabi Market. Table 3-1 illustrates the South Asian population within the surrounding community as well as the City of Vancouver:

- Overall, within the surrounding community, the South Asian population has stayed relatively stable since 2006. The 2021 Census South Asian population in the surrounding community is 14,100 persons. This population figure is relatively unchanged since 2006.

Table 3-1: South Asian Population

South Asian Population	2006	2016	2021
Surrounding Community	13,600	14,800	14,100
City of Vancouver	32,500	37,100	44,900
City of Surrey	107,800	168,000	212,700



Source: Tate Economic Research Inc.

- While the South Asian population in the surrounding community has remained stable, the City of Vancouver has experienced a 38% increase in the South Asian population between 2006 and 2021 from 32,500 to 44,900.
- It is recognized that during this same period, the South Asian population in Surrey increased by 97% from 107,800 to 212,700 persons. Therefore, from a relative attractiveness context, Surrey represents a substantially larger market for South Asian-oriented businesses, however this also comes with increased competition.
- There are different ways to interpret the surrounding area population data:
 - As an opportunity – Due to the stable population within the surrounding community, a similar level of potential demand exists as when Punjabi Market had 21 South Asian Fashion Stores and 11 Jewellery Stores (2008 data).⁹
 - As a challenge – Despite the stable population Punjabi Market has lost a significant amount of South Asian oriented businesses.
- Similarly, the increase in the Vancouver South Asian population can also be viewed as an opportunity or challenge.
 - As an opportunity – There is a growing South Asian market that may not know about Punjabi Market.
 - As a challenge – The geographically dispersed South Asian population provides opportunities for South Asian businesses in other parts of the city.
- It is the Consultant Teams opinion that as long as demand is present, which it is, the opportunity exists to ‘recapture’ local expenditures and capture new expenditures through the implementation of a strategy to reverse the impacts of the factors listed in Section 3.1.¹⁰

⁹ We recognize that the existing population is likely aging and therefore disposable income in real terms may have decreased.

¹⁰ While we do not have local customer draw data from 2006 it can be reasonably inferred that the Punjabi Market “capture rate” of local dollars has decreased based on the factors identified in the previous section. (Capture rate: The amount dollars spent at South Asian goods and services in Punjabi Market divided by the total local area spending potential for South Asian goods and services.

3.3 Phase 1 - Business Owner Consultation

There were a number of comments from the Phase 1 – Business Owner Consultation that speak to the future of Punjabi Market. A summary of the comments can be found in Appedix A. The following is a brief summary with respect to the future of Punjabi Market:

- There is a recognition that new residential buildings provide the opportunity for new ground floor commercial supply as well as additional population.
- There is an understanding that as private developments, new mixed-use developments can determine who leases the space.¹¹
- There is generational difference in optimism for the Market. Newer businesses feel more hopeful about the future of Punjabi Market. Many older operators in the Market do not have anyone to pass the business onto and are therefore somewhat disconnected from the potential opportunities for revitalization.
- A common theme was that many of the clothing stores would not be able to pass the business onto their children, mostly due to a lack of interest from the younger generation. This is in contrast to the jewellery stores which appeared to be viable for the younger generation.

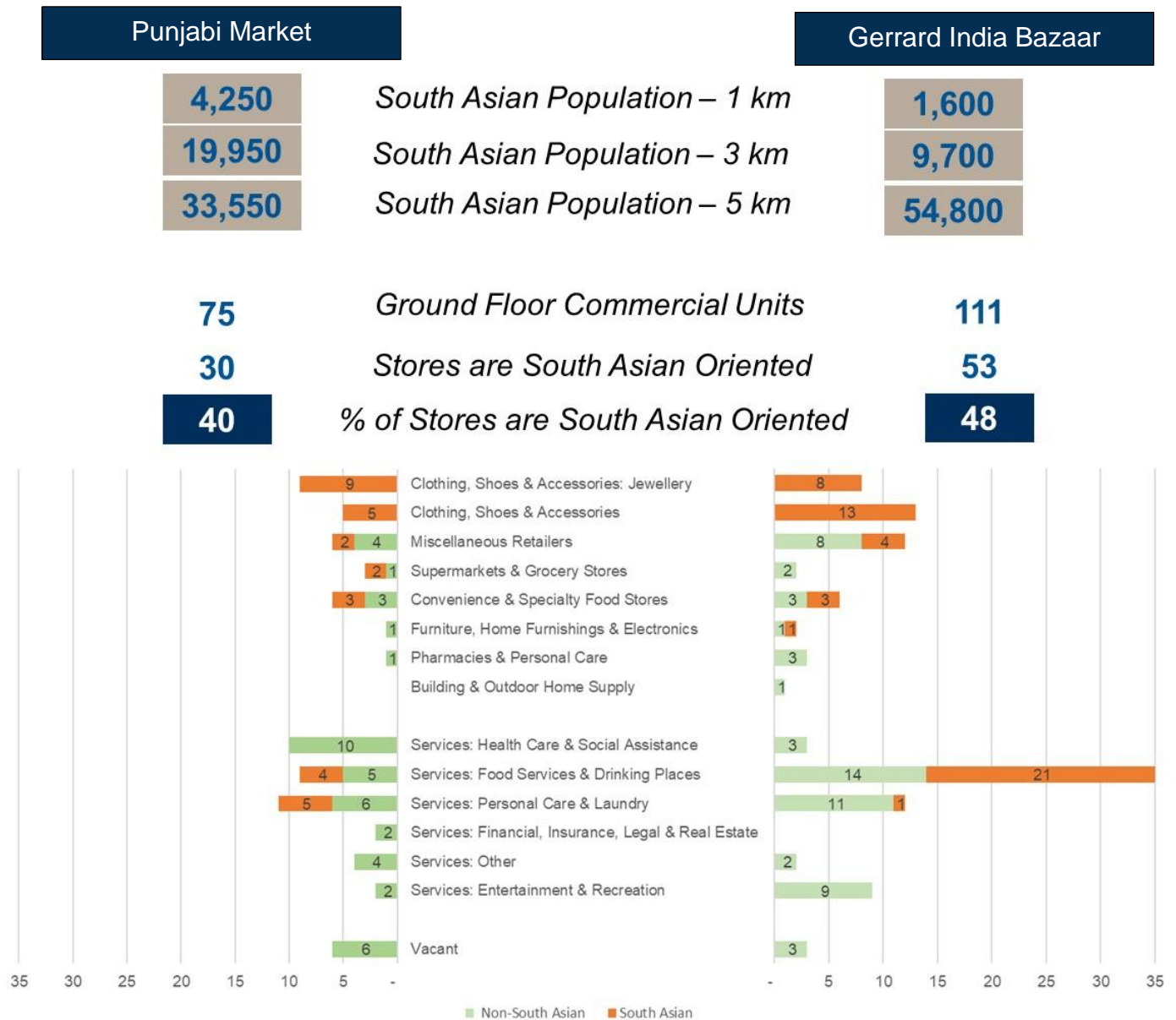
3.4 Examining Gerrard India Bazaar in Toronto as a Proxy of Demand

Toronto is home to the Gerrard Indian Bazaar BIA or Little India as its colloquially known. While Little India has experienced the same pressures of gentrification and the resulting change in tenant mix, it is still extremely successful as a destination for South Asian stores. Figure 3-3 provides a comparison of the two areas:

- Both streets share a similar macro context in that they are not located in proximity to the main concentrations of South Asian commercial space (Surrey and Brampton);

¹¹ This could be based on the fact that the mixed-use building at the corner of E 49th Ave. and Main Street resulted in the displacement of South Asian stores and is now tenanted by non South Asian national.

Figure 3-3: Comparison of Punjabi Market and Gerrard Indian Bazaar



Source: Tate Economic Research Inc.

- However, within the local area the similarities diverge:
 - Punjabi Market has 63% more South Asians living within a 1 kilometre radius and 51% more South Asians living within a three kilometre radius of the main street.
 - Its only when you get to a 5 kilometre radius does the South Asian population surrounding Little India exceed that of Punjabi Market.

- From a tenant mix perspective, the most important difference is the number of South Asian oriented restaurants. Little India has 21 versus the 4 in Punjabi Market. This disparity is also found in non South Asian restaurants with Little India having 14 versus 5 in Punjabi Market.
- Restaurants and other food services (i.e., food trucks) have been one of the main drivers of retail commercial leasing in the past decade. Many of the food services in Little India are sit down restaurants which results in more traffic during the evenings and provides a greater level of sidewalk animation. Little India also permits sidewalk food stalls which activate the street.
- In addition, Little India has an “anchor” institution: Lahore Tikka House. Lahore Tikka House has been open since 1996 and has a wide appeal including beyond the South Asian diaspora. Its location at one end of Gerrard Street also pulls traffic through the street.
- There are other factors such as more vibrant signage and window displays as well as colour coordinated light post banners, planters and benches. In addition, vehicular traffic is much slower, in part due to street car route and more options for crossing the street through signalized pedestrian crossings.
- The street width in Little India is also narrower which results in a more intimate shopping environment as well as the ability of create better synergies with retail on both sides of the street.
- Little India has a BIA which is very active in events and promotion. The BIA is mindful of promoting all tenants regardless of whether they are South Asian or not, while maintaining an overall South Asian flavour through events. including annual Christmas Tree lighting, Santa in the Bazaar, Diwali Mela, Festival of South Asia, Baisakhi Mela and Ramadan and EID Mela.

Little India provides a good proxy for the revitalization of Punjabi Market with a larger South Asian population in its local area, Punjabi Market can pursue revitalization through a more customer-centric retail approach, adjustments to the tenant mix, public realm interventions as well as other factors identified in the next section of this report.

3.5 The Future Market Viability for Punjabi Market Summary

The potential exists for a revitalization of Punjabi Market.

- Any revitalization attempt will require intentional curation and significant attention to the retail tenant mix, retailer operations, retailer experience and public realm.
- Furthermore, given the competition and range of comparison shopping opportunities in Surrey, the revitalization of Punjabi Market should not be viewed as an opportunity to compete with Surrey. For example, there is likely no scenario where customers looking for bridal wear would only choose to shop at Punjabi Market without also visiting shops in Surrey.
- Rather, Punjabi Market requires a “unique selling proposition” to attract visitors. For example, Punjabi Market could be a unique food destination with an arts and culture focus. This would appeal to a broader customer base than just the South Asian population. In other words, while its history is important it needs more than its history to be viable in the future.
- As described in the previous section, this does not (and should not) preclude non South Asian retail and services. However, any retail or service tenant in the Market should have a role in driving traffic to the Market.
- Beyond the broad appeal of food, there is also an opportunity to broaden the general appeal of Punjabi Market to a wider non South Asian market. The South Asian offerings in Surrey appeal mostly to a South Asian population. Navigating the large number of South Asian stores and services, especially restaurants, is intimidating to non South Asians. Punjabi Market has the opportunity to provide a more accessible South Asian experience with a curated approach.

The next section of the report will examine work that has been done to date to support the cultural aspects of the Punjabi Market.

4 Cultural Placekeeping and Retail

As stated previously, at its most basic, Punjabi Market is a commercial main street with a South Asian business orientation and holds cultural significance within the immediate and greater Vancouver South Asian community.

Up to this point, this report has focused on the commercial viability of this segment of Main Street as a commercial corridor and the associated role as Vancouver's Punjabi Market. However, Punjabi Market is a cultural touch stone for many South Asian residents who either frequented the Market as early immigrants or remember going to the Market with their parents. The Punjabi Market is especially valued to the Punjabi Community who settled in the surrounding area due to the proximity of the Ross Street Gurdwara.¹²

The Punjabi Market Collective ('PMC') is a non-profit organization that has taken on the role of revitalizing Punjabi Market as a cultural destination. Their work to date can be found on their website punjabimarket.ca.

The Punjabi Market Collective is a non-profit organization made up of passionate advocates, artists, students and entrepreneurs who are working towards revitalizing Vancouver's historic Punjabi Market by beautifying the Market and creating a hub for arts and culture.

Through consultations with business operators by the Consultant Team, it is understood that the events and public realm projects undertaken by PMC have been well received and appreciated by the existing retailers.

4.1 South Asian Retail Foundation is Critical to Success

Punjabi Market could be described as a cultural district. It is important to note that the basis for this cultural district is the retail main street. For many cultural districts, including Punjabi Market, there is a general consensus that the local

¹² Take a walk through the past, present and future of Vancouver's Punjabi Market. CBC <https://www.cbc.ca/news/canada/british-columbia/efforts-vancouver-punjabi-market>

main street retail that uplifts the cultural identity of the community is one of the defining characteristics of cultural districts. Without the retail, the cultural district would cease to exist in a way that everyday citizens can interact with.

Therefore, while the work being done by PMC is an important part in strengthening, re-introducing, and enhancing the cultural identity of Punjabi Market, there needs to be an equal if not greater commitment by the retailers and property owners to reverse the current decline of the South Asian orientation of the retail component of the street.

4.2 The Importance of Strengthening the Cultural District

The City of Vancouver, along with PMC, are invested in safeguarding the cultural

identity and heritage of Punjabi Market. There are various initiatives underway to further this cause. This report focuses on the intersection of the work being undertaken by PMC and its impact on the commercial components of Main Street.

Creative Placekeeping

Creative placekeeping / placemaking can significantly enhance the vitality and success of main street retail by transforming it into a vibrant and engaging destination. One of the key benefits lies in creating or maintaining a sense of place, fostering a unique identity that sets the area apart and attracts both residents and visitors. By incorporating elements like public art installations, green spaces, and community gathering spots, creative placekeeping / placemaking not only beautifies the surroundings but also fosters a strong sense of community. This sense of place encourages people to spend more time on main street, increasing foot traffic for local retailers. Furthermore, the social and cultural activities that often accompany creative placekeeping / placemaking initiatives, such as festivals or markets, generate a lively atmosphere, making main street a more enjoyable and memorable experience. Ultimately, creative placekeeping / placemaking transforms main street retail into a dynamic hub that not only supports local businesses but also contributes to

Figure 4-1: Creative Placekeeping

“Creative Placemaking has been described as a process of community development that leverages outside public, private, and nonprofit funding to strategically shape and change the physical and social character of a neighborhood using arts and cultural activities. While there are ample examples of Placemaking activities resulting in positive change, some Placemaking activities can also support gentrification, racism, real estate speculation, all in the name of “neighborhood revitalization.” Across the country, “Creative Placekeeping” has come into usage as a counter to Placemaking. Placekeeping as the active care and maintenance of a place and its social fabric by the people who live and work there. It is not just preserving buildings but keeping the cultural memories associated with a locale alive, while supporting the ability of local people to maintain their way of life as they choose.”

US Department of Arts and Culture

the overall well-being and vibrancy of the community. Another appeal of the PMC work is the reintroduction of the Market to non South Asians who in many cases do not even know Punjabi Market exists.

Social Capital Development

One of the past strengths of Punjabi Market was as a community focal point for new immigrants as well as more established residents. There are many stories of people connecting in Punjabi Market and lifelong friendships being forged in the Market. These types of connections are called *social capital*.

By revitalizing the cultural status of Punjabi Market, there is a whole new generation of South Asian and other Greater Vancouver residents that can build their social capital through events and visiting the Market. This is particularly true for new immigrants who often have little or no social capital.

Figure 4-3 illustrates the areas within Greater Vancouver where a third of the population is South Asian and there has been immigration after 2018. As can be seen, the areas around Punjabi Market have welcomed new immigrants since 2018. Many of these immigrants are South Asian. In addition, there are a significant number of Indian and other international students at Langara College. Punjabi Market has the potential to play the same cultural / community role today that it played for most of its existence but has declined in recent years.

By creating opportunities for social capital development, new connections will be developed with Punjabi Market that will potentially lead to long term commercial resiliency.

4.3 The Role of Public Space

Public space such as a parklet or sidewalk bench, when examined in the context of minority and / or immigrant populations, takes on a greater meaning. There is a host of literature on the benefits of “public space as a catalyst that enables people to build communities; to commit themselves to each other; and to knit the social fabric...where trust and social networks flourish, individual, firms, neighbourhoods and even nations prosper economically. Social capital can help mitigate the insidious effect of socio-economic and socio-cultural advantages”¹³

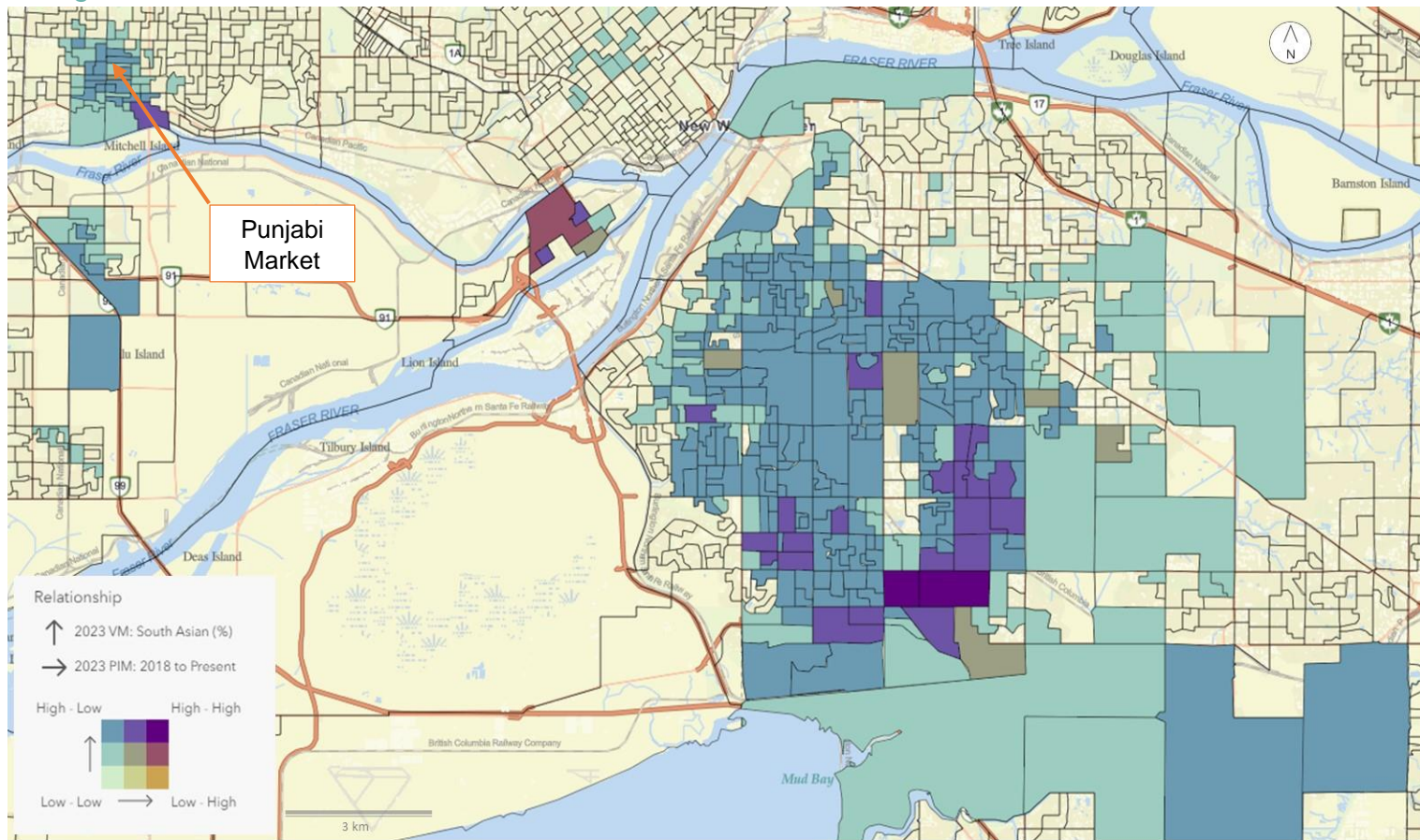
Figure 4-2: Social Capital

“Social Capital refers to the vibrancy of social networks and the extent to which individuals and communities trust and rely apart one another. It is a key ingredient in making communities productive, healthy, inclusive and safe. Social capital can be seen as a resource that communities can draw on to respond to crisis [through collaboration and mutual support]; at the same time is a resource that can be depleted leaving communities less well positioned to face what comes next.”

Toronto Social Capital Study 2022

¹³ Does public Space create social capital? Akram M. Ijla, Global Journal of Sociology and Anthropology

Figure 4-3: Dissemination Areas with 30% South Asian Visible Minority Population and Immigration Post 2018



Source: Tate Economic Research Inc. ArcGIS Business Analyst, 2023 Environics Analytics

In practice, the parklet, plaza or bench sometimes require symbols or cultural markers that indicate that these spaces are intended to be free and accessible to all and that, although in the midst of a commercial main street, active commerce transactions are not required to participate within the district.

4.4 What Does this Mean for Punjabi Market

The City has allocated \$150,000 of its existing placemaking capital budget to develop a creative welcome feature for the area. Furthermore, the City in collaboration with PMC have already completed many projects including:

- Install a “placemaking node” at Main and 51st with marigolds in a tree, 3 picnic tables and posters attached to nearby fencing.
- Install 4 murals (PMC Partnership with Vancouver Mural Festival - City contributed \$10,000).
- Coordinate with the Green Streets program for planting plan and volunteers to maintain garden beds.

- Introduce new banner artwork by Musqueam artist Debra Sparrow and PMC member and artist Jag Nagra (PMC Partnership with the Indian Summer Festival).

Some other potential opportunities are:

- Using vacant store fronts as pop ups for events. Associations such as ATI Vancouver (All Things Indian) are a hub for newcomers and could host events in Punjabi Market such as networking events and even job fairs.
- Identifying funding to lease space for newcomer social supports such as YMCA's Career Paths for Skilled Immigrants program.
- Approaching national chains, specifically RBC and Tim Hortons, to discuss newcomer hiring and community economic development (CED) initiatives.

In addition, the historical significance of Main Street to the Punjabi diaspora in Greater Vancouver is understood and reflected in the name "Punjabi Market". However, consideration should be given to renaming the commercial node to account for the current diversity of users that include business operators from the larger South Asian diaspora. This also allows for more people to feel comfortable within the Market.¹⁴

This has been noted in the consultations where some respondents noted that they did not feel like they had a voice as they were not Punjabi. Furthermore, from a commercial success context, a broader, yet still South Asian orientation, will allow for a greater acceptance of different business operators as well as visitors to the street.

The onus for this is not on the PMC, as they have a right to determine their mission, however, realistically, any name change would require support from PMC.

¹⁴ This recommendation recognizes concerns around cultural erasure. However, as stated in the Caveat (Section 1.7) any recommendations in this report should be viewed through the lens of protecting the cultural heritage. However, there may be instances where enhancing retail viability could introduce trade-offs, or come at the expense of protecting cultural heritage. Therefore, in order to strike a balance between potentially different perspectives, consideration should be given to priorities of the community, business and property owners when making such decisions.

4.5 Cultural Placekeeping and Retail Summary

The attention paid to the cultural aspects of Punjabi Market are on the ascent while its South Asian orientation is on the descent. However, it cannot be stressed enough that the local main street retail that uplifts the cultural identity of the community is one of the defining characteristics of cultural districts. In other words, without the retail focus, the cultural district would cease to exist in a way that every day citizens could interact with.

The next section of the report examines the options for a commercial focused organizational entity that can revitalize the South Asian focus of Punjabi Market and complement the work being undertaken to reestablish the cultural importance associated with the historic Punjabi Market.

5 Potential Organization Structures to Guide Revitalization

The previous section identified the PMC as an organization that is invested in cultural placekeeping in Punjabi Market. This section of the report identifies types of organizations that could help with revitalizing the South Asian business orientation of Punjabi Market.

5.1 Types of Organizational Entities?

This section of the report identifies three types of business focused organizational entities that can could help with revitalizing Punjabi Market.

5.1.1 Business Improvement Area

A Business Improvement Area (BIA) is a non-profit association of businesses and property owners where all commercial properties/businesses in the area must pay a levy to fund "business promotion" activities.

Pros

- Presents a structured and formal approach to improving the commercial district with a governance structure and a board of directors made up of property owners and retailers.
- The funding for a BIA comes from a levy on the assessed value of the properties payable by the property owner. This stable funding allows for more strategic, longer-term thinking, and more capacity to drive initiatives.
- The dedicated funding allows for hiring staff, marketing, annual events, and physical improvements.
- The businesses within the BIA boundary benefit from being a part of the City's BIA network of 22 other BIAs in terms of knowledge sharing as well as advocacy.
- The formation of a BIA means that the BIA represents all business within the BIA boundary. This mandate and the fact that a BIA is connected to

the City allows for direct collaboration between businesses and local government agencies.

- Governed by Provincial legislation (Vancouver Charter, Part XXI), and formally designated by City bylaws.

Cons

- A BIA is funded by a levy on the assessed value of ALL the properties in the BIA boundary. In many instances the levy is passed down from the property owner to the tenant in the form of additional rent. Therefore, this required levy can cause disagreements from those that feel they don't benefit equally.
- A BIA is required to represent interests of property owners and businesses. In some instances the priorities of property owners are at odds with those of business owners.
- Many BIA's tend to be large (see Figure 2.6), with hundreds of members. Due to the governance structure decision-making can take longer.
- As the BIA is funded by a property assessment levy, there are many more requirements from provincial and City governments in use of funds and general administration (e.g. annual financial audit, renewal terms).

5.1.2 Merchants Association

A merchants association is a non-profit association of businesses funded by the membership fees of businesses that choose to become members. Examples include Steveston Merchants Association and Vancouver Chinatown Merchants Association. It should be noted that Punjabi Market also had a merchants association which we understand is no longer active.

Pros

- Unlike a BIA where the levy is mandatory within the BIA boundary, a merchants association levy and membership are voluntary.
- As the merchants association is not governed by the Vancouver Charter like a BIA, there is more flexibility than BIAs in use of funds.
- A merchants association is directly focused on the interests of businesses in a specific area and typically does not deal with events and public realm.

- Due to the lack of a formal imposed governance structure there is more flexibility to address unique challenges.
- A merchants association usually represents a close-knit community of businesses working together.

Cons

- A voluntary membership and levy usually result in limited resources compared to BIAs.
- Due to the nature of the association and lack of broad mandate, it may lack the structure or capacity to drive significant changes.
- Challenges in maintaining engagement and participation.
- Businesses that don't contribute financially could potentially still receive the benefits.

5.1.3 Cultural Organizations

A cultural organization is typically a non-profit, that has a specific cultural mandate. An example of a cultural organization would be Punjabi Market Collective (PMC)

Pros

- Cultural organizations can bring a community-focused perspective that is sometimes missing from the more business-oriented organizations.
- The members of cultural organizations have broad experience and may have experience in community development and engagement.
- Cultural organizations can apply for more diverse grants because of their broader purpose.

Cons

- Membership fees are not a common funding mechanism and therefore funding constraints can limit the scope of their impact.
- A cultural organization operating in a main street might lack the specialization of more business-oriented organizations.
- Balancing community interests with business interests can be challenging.

5.2 Examples of Organizational Entity Accomplishments

There are many things a business-focused organization can do to strengthen Punjabi Market. Ultimately, the priorities for the organizational entity will be determined by the membership of that entity.

This section provides a summary of the various opportunities available to an organizational entity. From a business centric perspective, these are in service of strengthening the attraction of Punjabi Market thereby increasing visitor traffic. A detailed summary of the opportunities is found in Appendix B

5.2.1 Influence Tenant Mix

Influencing the tenant mix on a main street requires careful planning, coordination, and collaboration with various stakeholders. The goal is to create a vibrant and diverse mix of businesses that complement each other and attract a broad range of customers. Often the best way to influence tenant mix is indirectly. For example, if the Punjabi Market looks and feels like a “Punjabi” or South Asian market other retailers will be attracted to the area due to the ancillary benefits of customer/tourist attraction and economies of agglomeration. Therefore, the following organization entity accomplishments all contribute to this overall attraction.

5.2.2 Beautification and Develop / Advocate for Community Spaces

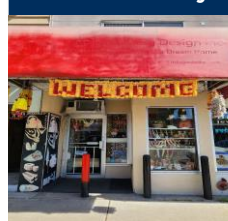
Beautification of a main street involves enhancing its aesthetic appeal through thoughtful urban design, landscaping, and public art installations. Advocating for community spaces on the main street emphasizes the importance of creating inclusive, accessible areas that foster social interaction, cultural engagement, and a sense of community pride.

Figure 5-1: The Importance of Footfall Density

Retail units whether it be on main street, strip plazas, power centres or shopping centres all require traffic. Pedestrian and/or vehicular traffic is critical. This traffic is generated by a number of interrelated factors including but not limited to location, tenant mix, public realm, accessibility, surrounding residential density and the daytime population.

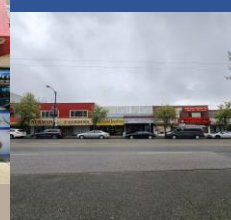
The number of pedestrians passing by a store front on a given day is known as the store's footfall density. It is generally assumed that footfall density is influenced by the attraction of a retailer. However, there are multiple geographical factors relating to transportation, employment and social life that influence it. Footfall density is critical as the number of people that actually enter a store, and the conversion rate (the percentage of people that actually make a purchase), is typically low.

Footfall Density



The number of people passing by a retail store.

Attraction



Typical retail stores attract 4% of passing footfall density.

Conversion



Once within a retail store under half (40%-50%) of people make a purchase.



Parklet (Robson St. BIA)



Pedestrian Plaza (Cambie Village BIA)



Flower Basket (Dunbar BIA)

5.2.3 Cultural Events and Programming

Delivering cultural events and programming on main streets entails coordinating and executing a variety of activities such as festivals, markets, and cultural celebrations that bring vibrancy and foot traffic to the area. These events serve as catalysts for community engagement, boosting local businesses, and creating memorable experiences that contribute to the overall vitality of the main street.



Farmer's Market
(West Broadway BIA)



Chinatown Festival
(Chinatown BIA)



Pop-Up
(Sunset on Fraser BIA)

5.2.4 Marketing and Promotion

Marketing and promotion are crucial for retailers on main streets as they increase visibility, attract potential customers, and communicate the unique offerings of local businesses. Effective marketing strategies not only drive foot traffic but also contribute to building a strong community identity, fostering customer loyalty, and ensuring sustained economic vitality for the retailers and the main street as a whole.



INDIAN CUISINE ON THE DRIVE

Turnmeric, Cumin, Coriander, and Cardamom – a curry lover's shortlist

Vancouver's Commercial Drive is home to some of the best South Asian cuisine in the city. Whether you are looking for a quick take-out option, or an elegant dinner date, you will find the exotic flavours of the Indian sub-continent prevalent right here on The Drive.

Commercial Drive BIA

Gerrard India Bazaar (Toronto)

Experience What North America's Largest South Asian Mainstreet Marketplace has to Offer

This slice of the Indian subcontinent offers a wide selection of products and services exhibited in an exotic display of sights, sounds, tastes and aromas.



Gerrard East Food Tours

On this iconic Toronto food tour, you will be treated to twenty (20) tastings as you visit six (6) fine-food shops, restaurants and bakeries over a delicious afternoon.



Art + Culture Walks

We have a strong tie to the arts community in the East End with organizations like The Blue Crow Gallery, Clay Space Studio, Gerrard Art Space, and East End Arts. Not to mention our amazing local murals. More info coming soon!



Watch Our CBC Documentary

Learn more about the origins of our beloved BIA starting with the Historic Naaz Theater. © 2016 Village of Dreams Productions Inc



Lunch + Learn

We are working on coordinating a number of local learning opportunities for small groups. More info coming soon!



South Asian Owned

Our BIA is a cultural hub, and home to a significant number of South Asian Owned businesses – Attracting visitors from not only within the GTA – But across the



Woman Owned

Looking for local woman-owned businesses in the East End? Here are some that deserve your love and support!



Taste of #LittleIndiaTO

If an assortment of delicious curries, dosa, desi burger, indian sweets or freshly baked naan are your cup of chai, you've come to the right place!



Shop From Home

A number of our local business owners have taken their shops online, making it easier to find and purchase whatever you need, from the comfort of your own home.

5.2.5 Retailer and Landlord Support

Advocacy for retailers and landlords can occur through engaging in dialogue with City staff to address regulatory concerns, zoning issues, or other barriers that may impact businesses. Additionally, an organizational entity can work to foster positive relationships between retailers and landlords, mediate disputes, and facilitate discussions on fair lease agreements and property improvements, creating an environment that encourages mutual support and long-term success for both stakeholders.

Council approves pilot property tax relief program for small businesses!



This is to inform you of a time-sensitive matter that requires your immediate attention.

As you may be aware, the City has implemented a new policy – Development Potential Relief – which requires the property owner's signature. A list of qualifying properties can be found here.



5.3 Roles and Functions of Different Organizational Entities

Table 5-1 below illustrates the typical roles and functions of BIAs, Merchant Association's and Cultural Non-profits and illustrates the key ways that they can differ from one another.

Table 5-1: Roles and Functions of Organizational Entities

Role and Function	BIA			Merchants Association			Cultural Non-profit		
Enhancing the Physical Environment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Placemaking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing and Promotion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Advocacy and Representation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Security and Safety	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Infrastructure and Maintenance		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Community Engagement		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tourism and Visitor Services		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Business Focus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Finance – Annual Budget via a Levy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Finance – Ability to Pursue Grants		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Governance – Board of Directors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Governance – Annual Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Core Function ☒ ☒ ☒
 Normally Undertake ☒ ☒
 Not Typical ☒

5.4 Phase 1 – Business Owner Consultation Regarding Organization

There were a number of comments from business owners in the Phase 1 consultation that speak to the need for, and roles associated with, a business focused organizational entity. A summary of the comments can be found in Appendix A. The following points highlight some of the comments with respect to operating a business in Punjabi Market:

- “Perspective of mutual support and non-competition, more traffic is supportive to all business owners”
- “New businesses are interested in getting to know other owners”
- “Cultural events supporting businesses through foot traffic”
- “Art and beautification of the Market is strongly supported”
- “Making the Market feel like a distinctive place”

5.5 Phase 2 - Business Owner Consultation Regarding Organization

Through a consultation process, facilitated by Roots & Rivers Consulting, business owners were encouraged to provide feedback on what types of organizational entities they thought would be appropriate. In total 20 business owners were engaged. A detailed summary of the consultation is provided in Appendix A.

Engagement with business owners included 2 days of drop-in focus group sessions and 1 day of walk-in 1-1 interviews. Engagement was conducted in both English and Punjabi. Focus group sessions included a walk through by TER of informational boards which detailed background on organizational structures including Business Improvement Association, Merchants Association, and Cultural Non-Profit Organization. Business owners were then invited to complete a survey to capture their reflections. The following is a brief summary of the findings:

- 90% of respondents “Agreed” or “Strongly Agreed” that an organizational entity could help strengthen Punjabi Market;
- 8 of 20 respondents thought a BIA would be the best organizational structure to support Punjabi Market, while one respondent thought either a BIA or Merchants Association. Therefore a total of 9 out of 20 respondents thought a BIA would be the best organizational entity.
- 6 of 20 respondents thought a Cultural Non-Profit would be better suited.
- Participants were invited to assess the different roles/responsibilities that could be taken on by a business-focused association, and to rank their top priorities within each category:
 - Beautification / Community Spaces

- Pedestrian only areas / Plazas (7 responses)
- Seasonal decorations / Planters (5 responses)
- Creating More Traffic
 - Public events and performances (8 responses)
 - Parking (6 responses)
- Helping Retailers and Landlords
 - Assist with social media (6 responses)
 - Market research and strategy (5 responses)
- Cultural interventions
 - Events and performances (8 responses)
 - Art and mural (4 responses)

Overall, there is no clear choice in which type of organizational entity would best be able to support businesses. Those respondents that support a cultural organization (implicitly PMC) are likely swayed by the fact that PMC is the only organization currently providing any support in the Market and therefore it is easier to understand their impact. We note that in our conversations with PMC, they have indicated that they are not a business focused organization.

The respondents have a keen insight into what interventions will support their business. Events and performances are viewed as the best way to create more traffic, help retailers and landlords and most effective cultural intervention. However, of note is the importance placed on parking. As stated in Section 2.2 parking does not appear to be a significant issue and therefore this will have to be further explored should an organizational entity be formed.

5.6 Recommended Organizational Structure

Based on the background research, consultation, professional expertise and our understanding of the opportunities and limitations of each of the organizational structures and the nature of the revitalization required and the tools required, it is the opinion of TER that a BIA would be the most appropriate type of

organizational structure to steward Punjabi Market and more specifically Punjabi Market businesses through a revitalization.¹⁵

The recommendation for a BIA is based in part on the following:

- The future of Punjabi Market as a South Asian oriented market hinges on attracting and curating more South Asian businesses. The role of a BIA is to specifically assist with business success.
- The South Asian orientation and the associated cultural visibility is valued by business owners. The mission of a BIA is dictated by its members which consist of business owners and property owners. Therefore, it is possible to be specific about the outcomes of a BIA.
- There is consensus that the South Asian orientation of the Market is declining. Consultations with business owners has also revealed that some key business owners will be retiring in the next 5+ years. Without a specific strategy, this decline is expected to continue. A BIA would be able to implement this strategy.
- The overall retail business environment is challenging, and a BIA can provide business specific supports to mitigate these challenges.
- There are two residential mixed-use buildings planned for Punjabi Market, each with ground floor commercial. A BIA is a conduit to the City and can advocate for the business and property owners' positions at the City.
- A BIA has access to a network of other BIAs across the City which is invaluable in terms of best practices implementation.

It should be noted that only the retailers and property owners themselves can decide to explore whether a BIA is right for them. If more than one third of business tenants and/or owners are against a BIA, the proposal will not be able to proceed.

The City of Vancouver's role, through the City's BIA Coordinator, is to facilitate the process and support parties that may be in favour or opposed to a BIA. It should be noted that forming a BIA requires time and could take anywhere from

¹⁵ It should be noted that Punjabi Market had a Merchants Association, however it is not active, nor does it have a broad membership.

12 – 18 months. Appendix C of this report provides reference material from the City of Vancouver on how to establish a BIA.

The next section of this report will present a potential strategy that a BIA, or another organizational structure, could employ to initialize the revitalization of the Market.

6 Retail Strategy

This section of the context in which a retail strategy can assist Punjabi Market and the parameters within which the strategy is formulated. For additional resources, Appendix C has a list of various interventions available to a BIA. Appendix E provides examples of what current Vancouver BIAs spend their budgets on.

6.1 When is a Retail Strategy Needed?

A retail strategy is required to implement a specific vision for a commercial area. That area could be a main street, shopping centre or a larger area such as downtown district. A retail strategy could also be formulated for an area that has yet to be developed such as a new neighbourhood.

For shopping centres where one entity controls all of the space, a retail strategy is typically formulaic (i.e., 80% comparison goods, 5% food & beverage, 5% services, 10% entertainment). A formula works for shopping centres as they are for the most part replicable and over the years a formula has been developed that results in the highest foot fall density and longest dwell time.

A retail strategy for a main street is much more complicated. There are different property owners, different businesses, boundaries between areas under the City's control and those that are the domain of private property owners and therefore there is very little control on directly implementing a tenant mix.

However, for the most part, main streets do not require a retail strategy. Main streets grow organically and the allure of main streets is their non formulaic tenant mix.

There are two scenarios where a retail strategy for a main street may be required:

- **Reinforcing Specialization** - Often, a main street may start exhibiting signs of a specialization. For example a South Asian clothing store may open. Over the next several years more South Asian clothing stores may open due to economies of agglomeration, (i.e. same uses locating in proximity to each other to generate more traffic). A retail strategy could be employed to brand the area as the "go to destination for South Asian clothing". This strategy could include events and programming, advertising, banners, and

public art. As the area becomes synonymous with South Asian clothing, complementary stores such as jewellery and home goods may decide to locate in the area due to their match with the overall South Asian theme. In this instance the strategy helped with branding the area as a South Asian specialized area. The tenant mix evolved to match the theme as there were implicit benefits to locating within this area. Over the long term it could be said that all of the strategy elements were implemented to curate or influence the tenant mix towards a South Asian orientation. This scenario could apply to many of the main street types listed in Table 2-1 such as Entertainment District, LGBTQ+ Districts, Fashion and Design Districts and Food and Culinary Districts.

- **Revitalizing** – The second scenario in which a retail strategy would be warranted is for a commercial area in decline. Unlike the specialization scenario, this retail strategy can apply to any main street, including a general main street with no specialization.

In keeping with the scenario above, let's assume there was a South Asian area that had become successful, but did not have a strategy in place to make it a success. Its success was wholly a function of market forces. Fast forward 25 years and those market forces that made the street a success have started to change. The South Asian street had none of the interventions such as events and programming, advertising, banners, public art to reinforce its South Asian image and mitigate those changing market forces. Over time, the South Asian specialization and reason for other South Asian business to relocate to this street has begun to wane. In this scenario, a retail strategy would be implemented to reestablish the area as the go to destination for South Asian stores. But unlike the first time the street came to prominence, this time is harder because market forces are not as conducive. This retail strategy would essentially be creating the conditions for the area to be associated as the go to South Asian area. However, initially, this would be by virtue of its non retail attributes such as events and programming, promotion, arts, and culture. Over time these interventions will start to influence the tenant mix to attract newer South Asian stores and services to the area.

6.2 What is the Context for a Retail Strategy for Punjabi Market

This report has focused on the context and feasibility of the renewal and regeneration of Punjabi Market. Therefore, the revitalization retail strategy outlined in Section 6.1 would be an appropriate frame of reference for why a retail strategy is required.

However, it should be noted that there is another option for Punjabi Market. That option would be to do nothing. There is evidence through tenants such as Tim Hortons and RBC that the Punjabi Market is a viable commercial street. Stores such as Dank Mart illustrate the trendy stores view this section of Main Street as a viable option. If left alone, it is our opinion that the street will continue to evolve, most likely away from its South Asian focus. While vacancies may increase due to the fact that there is significant competition in the surrounding area for local and convenience goods (i.e. Fraser Street), overall we believe it will find its equilibrium over the longer term with a mix of convenience goods and services. In this scenario a retail strategy would not provide significant value as the street will evolve like most main streets.

Therefore the retail strategy in this section explicitly deals with a South Asian revitalization scenario. We note from Section 3.4 of this report “Examining Gerrard India Bazaar in Toronto as a Proxy of Demand” that the revitalization of Punjabi Market does not mean that non South Asian retailers will not benefit. In fact in the case of Gerrard India Bazaar, many of the non South Asian stores draw people into the area that may not have come otherwise providing an opportunity to expose them to the South Asian culture. However, this strategy focuses revitalizing the South Asian component.

6.3 Who is This Strategy for and why now?

This retail strategy is primarily formulated for retailers and property owners to assist with their decision-making process regarding the establishment or continuation of an organizational entity, if at all, by examining what that entity could achieve as outlined in this strategy.

This strategy represents a guideline and phasing of steps that should be considered when thinking about the revitalization of Punjabi Market.

6.4 How Did we Arrive at the Specific Objectives of the Strategy?

The following observations helped frame the objectives of this strategy:

- The Consultant Team believes there is consensus that the South Asian orientation of Punjabi Market is declining.
- The Consultant Team believes that not all businesses think revitalizing the South Asian orientation is the future. This is not based on an apathy towards the role and historical significance of South Asian businesses. Rather, it is based on concerns about the financial viability of South Asian businesses in the face of changing demographics and competition. The

Consultant Team has examined the underlying market fundamentals and disagrees. There is a market case for revitalizing the South Asian orientation as discussed in Section 3 of this report.

- The Consultant Team believes that there is consensus and a strong desire not to lose the historical significance of Punjabi Market.
- The Consultant Team does not think there is a broad understanding that the main street retail that uplifts the cultural identity of the community is one of the defining characteristics of cultural districts. In simple terms without a strong South Asian oriented retail mix there will no future for a cultural district. Therefore, by default, strengthening the South Asian orientation of Punjabi Market is the main objective. This would help ensure the future of the cultural district and associated historical significance. This also aligns with the work undertaken by the City (and PMC) as outlined in Sections 1.2 and 5.5 with respect to revitalizing Punjabi Market. This strategy is a continuation of that work.
- In addition, the Consultant Team understands that there are questions about Punjabi Market playing a more local retail role for the surrounding community which is diversifying. We believe that if a BIA cannot be formed and a strategy implemented, the economic market will determine this. However, in the interim there are significant commercial concentrations in the surrounding area, specifically, Fraser Street that do a great job of providing that local role and Punjabi Market would have difficulty competing with that.

The following observations helped frame the specifics of the strategy:

- The RFP and the resulting capacity building and strategy was premised on significant engagement by business and property owners. Those business and property owners that did engage provided valuable feedback. However, it should be noted that despite going business to business, there were various barriers to engaging Punjabi Market business owners. Overall, the Consultant Team had hoped for more participation from Punjabi Market businesses.
- Therefore, without a broad understanding of the specifics desired by Punjabi Market businesses this retail strategy is a high-level guide developed by the Consultant Team, based on our understanding of the issues, the feedback from the consultation process, and our professional expertise.

- Overall, the goal is to influence the future tenant mix to include more South Asian stores in a vibrant shopping district while supporting the existing businesses. Influencing the tenant mix occurs in two ways:
 - Indirect (short term / medium term) – By enhancing the physical and financial attractiveness of Punjabi Market, South Asian retailers will consider (re)locating to Punjabi Market. Enhancing the attractiveness of the Market can occur through:
 - Marketing and Promotions (short term)
 - Public Realm Improvements (short term)
 - Cultural Events and Programming (short to medium term)
 - Direct (medium to long term)– target South Asian retailers and match them with vacant or soon to be vacant space.

It should be noted that influencing the tenant mix also results in a number of ancillary benefits such as creating a vibrant street, supporting and enhancing the cultural aspects of Punjabi Market, and providing entertainment to the larger area.

Recognizing that the retail environment is subject to constant changes, a strategy document serves as a guiding framework that must be regularly revisited and revised. This dynamic nature ensures its relevance and effectiveness over time.

The retail strategy in the section is written as if a BIA or other type of organization has been newly formed and this strategy is the first step. The implementation of this or any strategy will in some cases require associated budgets and therefore consideration will have to be given on priorities.

6.5 Retail Strategy Steps

The first step is to establish a collaborative process that brings together local businesses, property owners and cultural organizations.

- At the outset, transparency and collaboration between all retailers (South Asian and non South Asian) is key to successful outcomes.
- The BIA membership will have to define a mission and vision. Most BIAs have missions such as:

- “To improve, beautify and maintain public lands and buildings within the BIA, beyond what is provided by the municipality-at-large” (Point Grey BIA)
 - “To promote the area as a business and shopping area – including eateries, shops and services – beyond yond what business can do individually” (Point Grey BIA)
 - “To Develop, Encourage and promote business in the Chinatown Business Improvement Area” (Chinatown BIA)
 - “To create an enhanced business environment that provides assistance and advocacy for our members and their relatable needs and concerns” (Mount Pleasant BIA)
 - “To improve and shape the environment for people and businesses of Sunset on Fraser” (Sunset on Fraser BIA)
- As Punjabi Market also functions as a Cultural District, organizations such as Punjabi Market Collective should be involved to understand synergies between the two organizations and to avoid duplication.
 - Form committees or task forces to address the action items within each category.

There are a number of opportunities to execute the vision of the BIA. The following provides a list of actions that should be taken to revitalize Punjabi Market. The actions are categorized into six categories:

- 1) Marketing and Promotions
- 2) Public Realm Improvements
- 3) Cultural Events and Programming
- 4) Retailer and Landlord Support
- 5) City Liaison
- 6) Tenant Mix

Marketing and Promotion (short term)

Social media such as Instagram and BIA websites are the “face” of Punjabi Market. Social media drives traffic and therefore a robust social media plan should be implemented that requires posting on a weekly basis.

- Social Media is key to interacting with a large segment of the consumer base. Promotion allows for targeted marketing that can differentiate Punjabi Market from other areas.
- Create a website for Punjabi Market that identifies retailers, hours of operation, and a calendar of events.
- Help businesses establish an online presence through websites and social media.
- Plan seasonal promotions and sales events to attract shoppers during peak times.
- Align promotions with local festivals or cultural celebrations.
- Offer joint promotions and discounts across multiple stores.

Public Realm Improvements (short term)

- Create a plan for public realm improvements. These public realm improvements should consider short term activations such as planters and art work. Longer term consideration of more sidewalk and curb activation through food vendors and patios should be considered.
- The BIA has the benefit of an organization such as Punjabi Market Collective that is committed to placekeeping interventions. This allows the BIA to provide more placemaking strategies such as plazas, seating areas, planters and seasonal lighting.
- It should be noted the City has allocated \$150,000 of its existing placemaking capital budget to develop a welcome feature. Furthermore, the City in collaboration with PMC have already completed many projects including:
 - Install a “placemaking node” at Main and 51st with marigolds in a tree, 3 picnic tables and posters attached to nearby fencing.
 - Install 4 murals (PMC Partnership with Vancouver Mural Festival - City contributed \$10,000).
 - Coordinate with the Green Streets program for planting plan and volunteers to maintain garden beds.

Introduce new banner artwork by Musqueam artist Debra Sparrow and PMC member and artist Jag Nagra (PMC Partnership with the Indian Summer Festival).

Cultural Events and Programming (short to medium term)

- Develop a calendar of cultural events and programs that align with the Punjabi Market's South Asian identity. This could include art exhibitions, live performances, and cultural festivals.
- Coordinate with local artists and organizations to actively participate in and contribute to these events.
- There will be significant overlap with the work undertaken by PMC and therefore it is strongly suggested to liaise closely with PMC to establish organizational strengths to ensure delivery of events is done efficiently. Ultimately both the BIA and PMC are working towards a similar goal.
- It would be advisable to have at least one annual recurring event. This will allow for easier access to sponsorship. For context Gerrard India Bazaar has 6 annual events comprising of the annual Christmas Tree lighting, Santa in the Bazaar, Diwali Mela, Festival of South Asia, Baisakhi Mela and Ramadan and EID Mela.

Tenant Mix (medium to longer term)

As stated in the previous section influencing the tenant mix can occur directly and indirectly. This section outlines the steps required to directly influence the tenant mix.

The most important strategy for a successful Main Street including Punjabi Market is influencing an appropriate tenant mix. An appropriate tenant mix generates traffic which is the key to sales. Table 2-3 of this report summarized the benefits associated with a well-balanced tenant mix.

However, achieving a well-balanced tenant mix on a main street where every unit is owned by separate individuals is extremely challenging. A private property owner can lease space to any business as long as it conforms to the zoning by-law in force. In order to increase the probability of curating the tenant mix there are a number of steps required.

What types of stores would be appropriate?

The BIA membership would need to determine what types of stores they think would be sustainable in the Market and would assist with driving more traffic. Therefore the first step would be to create an aspirational tenant mix. The majority of South Asian oriented stores fall into six categories:

- Clothing – It is the opinion of the Consultant Team, that while there are opportunities for small clothing boutiques, this should not be the focus of the tenant mix. However, there are hundreds of years of combined experience in the clothing industry in Punjabi Market. The BIA members should determine whether trying to re-establish the clothing focus is a viable tenant mix strategy. The business owners understand their customer base the best.
- Jewellery – It is the opinion of the Consultant Team, that Punjabi Market has a sufficient number of jewellery stores. It should also be noted that these stores, as configured, are not very conducive to attracting the casual shopper looking to browse. The security features to entering the stores make the process less amenable to just “popping in”.
- Personal services (i.e., hair) – there are eleven personal service businesses in Punjabi market with approximately half catering exclusively to a South Asian clientele. It is the opinion of the Consultant Team, that personal service businesses are good in that they generate consistent traffic. However, if choosing between personal services and specialty food and restaurants, the latter two categories would be preferred.
- Home Décor – while home décor is not a typical South Asian retail category, there is a growing interest in authentic goods from the sub continent including art work. It is the opinion of the Consultant Team, that there is also an opportunity for home décor stores. Home décor stores appeal to a wider audience beyond the South Asian consumer thereby building in future resiliency.
- Specialty food – This category is generally comprised of grocery stores and sweet shops. It is the opinion of the Consultant Team, that this is a growth category specifically with South Asian twists on traditional offerings. A successful Toronto example would be Nani’s Gelato which specializes in artisanal gelato production with a focus on Italian and nostalgic Asian gelato flavours. These types of ‘trendy’ specialty food

stores create a lot of traffic not only from South Asian's but also from the wider population.

- Restaurants – quick service restaurants or full service sit down restaurants. It is the opinion of the Consultant Team that the most obvious need in Punjabi Market is a greater diversity of sit-down restaurants. Over the longer term, a greater number of sit down restaurants will also animate the street in the evenings which it currently lacks. If we use Gerrard India Bazaar as a benchmark, Punjabi Market could support 10 more South Asian restaurants. In order to attract restaurants the following should be undertaken:

Businesses

- Cultivate a list of potential retail / service targets that may be interested in locating in Punjabi Market. This is typically a “chicken and egg” scenario as potential relocation targets want established traffic, whereas the BIA wants the relocation target in order to create additional traffic. This is where other strategies such as events and programming and public realm improvements help with generating traffic.
- Identify Indian food franchises that are looking for opportunities. Franchises such as Chaiwala of London, Dosa Eatery, Bombay Frankies, Twisted Indian Fusion Street Food are all expanding and looking for new locations.
- Assess the opportunity for a South Asian market (i.e., a night food market) through which the BIA can start to identify potential food and other concepts for more permanent tenancy in the future.

Commercial Space

- Compile a comprehensive list of property owners. This list would have already been generated as part of the BIA levy calculation.
- Establish the current lease terms of every unit on Main Street as well as lease extensions. Understanding when a unit may come up for lease is important in order to plan for retenancing opportunities.
- Categorize the commercial units by their characteristics (i.e., are restaurant kitchen fit outs such as ventilation and washrooms in place)

- Identify property owners who have bought into the mission of revitalizing Punjabi Market and would be amenable to leasing space to retail and service tenants that fit tenant mix vision.
- Regarding restaurants, it is noted that attracting a restaurant use to a store that was not previously a restaurant is challenging due to the cost associated with fitting out a restaurant. Most restaurants on main streets continue to cycle through the same units as they already have the kitchen fittings, exhaust vents, and fire suppression in place. Furthermore, older building such as those on Main Street are more challenging to retrofit into restaurants.
- There are two proposed mixed-use developments with ground floor commercial units at 6495 Main Street (north west corner of Main St. and E 49th Ave.) and 6679 Main Street (north west corner of Main St. and E 51st Ave.). A BIA could engage with both developers to share the vision and strategy for Punjabi Market and potentially help market the ground floor commercial units to appropriate users. A BIA could also help market these units to Indian food franchises mentioned above.

Retailer and Landlord Support (on-going)

- Offer business development workshops, mentorship programs, and networking events to support local businesses.
- Provide resources for storefront improvements and facade enhancements and potential access to City grants to facilitate such improvements.
- Implement technology solutions to enhance the overall shopping experience, such contactless payment options.
- Liaise with Vancouver BIA Partnership to collaborate on Vancouver BIA wide campaigns as well as property owner challenges such as disproportionate property taxes.
- Access Small Business BC's Bizmap which provides market data at the neighbourhood level.

City Liaison (on-going)

- Advocate for more support from the City to further the Vancouver Plan policy stating: "Advance work to define and identify special market areas

(e.g., Punjabi market) and their connection to ethno-central community areas. Develop programs to recognize and secure their economic, social, and cultural importance as they serve and attract a city wide, regional and/or ethnic customer base, and do not rely on local residents alone.”

- Liaise with the City’s Planning and Engineering departments to assess the opportunity to implement public space, placemaking, and other programs for the programs such as VIVA Vancouver to activate space in Punjabi Market.
- Liaise with the City to further the 2022 Council Motion directing staff to “explore and provide policy recommendations for protecting and promoting cultural food assets and other forms of intangible cultural heritage”.

6.6 Strategy Summary

The proposed retail strategy in this document is not a “quick fix”. This is particularly true in BIAs which are limited by their budget. The reality is that every year the membership will have determine priorities and, in some years, opportunities will not be fulfilled.

As with any strategy the BIA should be prepared to monitor the benefits of any interventions. This could be through the use of mobility data on a month over month period or informal reporting from businesses on sales.

Appendix A – Context for Examining Punjabi Market

Different Types of Main Streets	
Type	Description
Downtown Main Streets	These are typically the central business districts of a city or town and often feature a mix of retail stores, restaurants, cultural venues, and office spaces. They are the heart of a city's economic and cultural activity.
Suburban Main Streets	Found in suburban areas, these main streets are often lined with shopping centers, strip malls, and a mix of businesses that cater to the local community's needs. They may have a more car-oriented layout compared to urban main streets.
Neighborhood Main Streets	These main streets are found in residential neighbourhoods and cater to the daily needs of the local community. They may have grocery stores, restaurants, cafes, and other essential services.
Entertainment Districts	Some main streets are known for their vibrant nightlife, entertainment options, and cultural attractions. They may have theatres, clubs, bars, and restaurants that cater to a lively evening crowd.
Waterfront or Harbourfront Districts	Main streets located along waterfronts or harbors may have a mix of restaurants, shops, and recreational activities, offering beautiful views and a connection to the water.
Tourist Main Streets	Located in popular tourist destinations, these main streets cater to visitors with souvenir shops, restaurants, and entertainment options. They are designed to attract tourists and provide a unique experience.
Historic Main Streets	Many cities and towns have historic main streets that have preserved their architectural heritage and charm. These areas often feature boutique shops, cafes, and cultural attractions, and they may be designated as historic districts.
LGBTQ+ Districts	These main streets are known for their LGBTQ+-friendly businesses, bars, and cultural events, fostering a sense of inclusivity and community.
Industrial Revitalization Districts	Main streets in formerly industrial areas may undergo revitalization efforts to repurpose old factories and warehouses into mixed-use spaces with businesses, galleries, and more.
Ethnic and Cultural Streets	Some main streets celebrate the culture and heritage of a specific ethnic or cultural group, featuring restaurants, shops, and cultural events related to that community.
Fashion and Design Districts	These main streets are known for their boutiques, fashion stores, and design studios, often attracting fashion enthusiasts and designers.
Food and Culinary Districts	These main streets are known for their diverse dining options, including restaurants, food trucks, and specialty food stores. They may be a culinary destination for food enthusiasts.

Physical Attributes of Main Streets	
Characteristic	Description
Block Spacing	The length of the blocks is also important as breaks in the blocks allow for people to enter into the street, promote greater pedestrian traffic and provide points of interest at intersections. Smaller blocks encourage more interaction.
Door Spacing	The space between stores, known as door spacing, is most effective when kept to between 4.5 to 9 metres, so as to animate the street and keep visitors interested in the next store and keep moving down the blocks.
Street Width	The distance between the two sides of the street is critical in creating an intimate environment and to encourage visitors to explore both sides of the street. Narrower streets allow for more interaction between both sides of the street.
Side Walk Width	Adequate sidewalk width enhances the retail experience by accommodating increased pedestrian flow, encouraging leisurely strolls, and providing space for outdoor displays, fostering a vibrant and inviting atmosphere. Conversely, narrow sidewalks may impede foot traffic, limit storefront visibility, and detract from the overall appeal, potentially impacting retail sales.
Parking and Accessibility	Ample parking and easy accessibility positively impact retail streets by attracting a larger customer base and encouraging convenient shopping experiences, contributing to increased sales and sustained commercial vibrancy. In contrast, insufficient parking and challenging accessibility can deter potential customers, limiting foot traffic and potentially hindering the success of retail establishments on the street.
Building Facades	Attractive and well-designed building facades enhance the visual appeal of main street retail, drawing in customers, creating a positive first impression, and contributing to the overall success of local businesses.
Building Scale & Proportion	The scale and proportion of buildings on main streets significantly influence the retail experience, with appropriately sized structures creating a harmonious and inviting urban environment that enhances customer engagement and contributes to the overall success of businesses.
Public Space	Public space such as benches, seating areas and parklets help with the shopping environment and dwell time.

Benefits of a Curated Tenant Mix	
Benefit	Description
Foot Traffic and Customer Attraction	A diverse tenant mix can attract a broader range of customers, increasing foot traffic. Different businesses appeal to different demographics, so a mix that includes retail stores, restaurants, service providers, and other types of businesses can draw in a
Vibrancy and Atmosphere	A diverse tenant mix can create a vibrant and dynamic atmosphere on a main street, making it more appealing to both residents and visitors. A lively and bustling environment can encourage people to spend more time on the street and return for future visits.
Reduced Vacancies	A well-balanced tenant mix helps reduce vacant storefronts, which can detract from the attractiveness of a main street. Empty storefronts can make an area appear less inviting and can have a negative impact on nearby businesses.
Synergy and Cross-Promotion	Businesses in close proximity can benefit from each other's presence. For example, a clothing store and a nearby coffee shop can work together to cross-promote their offerings, encouraging shoppers to stop in for a coffee after shopping, and vice versa.
Economic Resilience	A diverse tenant mix can make the main street more resilient to economic downturns or changes in consumer preferences. When one type of business faces challenges, others can help stabilize the local economy.
Enhanced Customer Experience	A variety of businesses can enhance the overall customer experience on a main street. Shoppers can enjoy a day of shopping, dining, and entertainment all in one location, making it more likely they'll return and recommend the area to others.
Attraction for Investors and Developers	A successful main street with a strong tenant mix can attract investors and developers, leading to further investment in the area. This can result in improved infrastructure, revitalization, and increased property values.
Cultural and Social Benefits	A diverse tenant mix can contribute to the cultural and social fabric of a community. It can support local artists, crafts person and entrepreneurs, fostering a sense of community and preserving the unique character of the area.

Appendix B – Consultation Summaries

Punjabi Market Renewal

Phase 1 Summary Memo - 1-1 Interviews



Overview

As part of Phase 1 of consultations of the Punjabi Market Capacity Building work, Roots & Rivers Consulting engaged in 2 days of walk-in semi-structured interviews with business owners in the Punjabi Market to understand their experiences in the market, changes observed, and expectations and hopes they have for the future. This memo summarizes what we heard from business owners.

Breakdown of interviews

- 14 Interviews
 - 12 South Asian owned and oriented
 - 1 South Asian owned and not oriented
 - 1 neither South Asian owned or oriented
- Interviewee business type
 - Grocery (4)
 - Clothing/ Fabric Store (3)
 - Restaurant (3)
 - Jewelry (2)
 - Miscellaneous (2)

Importance of the Market

- Importance of retail location
 - South Asian oriented
 - Foot traffic from Langara College
- Care for the community
 - Positive environment in neighborhood
 - Developed strong social connections
- Identified a need for South Asian businesses

Changes Observed

- Businesses leaving area to other areas such as Surrey, Langley and Abbotsford
 - High rent and cost of living in Vancouver
 - Clothing stores in particular have left
- Reduced foot traffic
- Covid pandemic has disrupted business
- More non-Punjabi businesses being established
 - E.g. Tim Hortons, Freshii

- Overall positive perceptions of these businesses
- More culturally diverse customer base
- Younger generations moving toward online retail spaces, Metrotown
- Appreciation for art and murals
- Increase in vacant buildings
- Increase in rent
- Feeling disregard from the City towards cleanliness in the area (e.g. need for power washing, maintenance of weeds growing on street concrete)

Connection to Other Businesses

- Supporting each other's businesses
- Perspective of mutual support and non-competition
 - Overall sentiment that more traffic is supportive to all business owners
- Referring customers to each other
- New businesses interest in getting to know other owners
- Informal social connections are present
 - Lack of formal network (e.g. staying connected through a platform)
- Other reflections
 - Varying degree of awareness of Punjabi Market Collective among business owners

Expectations in 10 Years

- New residential buildings to bring in new stores and customers
- Longstanding business owners will retire
 - Expect being last generation of family businesses; lack of desire for next generation of their family to continue the business
 - Inflation not worth staying in the Market, challenge to keep up with rising costs
- Deteriorating conditions of buildings
- Generational difference
 - Newer businesses feel more hopeful about future of Market than long standing businesses
 - Newer businesses, South Asian oriented but not Punjabi specific, can reach more diverse customer base

Hopes in 10 Years

- Desire to see more restaurants and clothing stores
- Lack of desire for future generation to take over business
 - Due to a lack of work-life balance and wanting a different working reality for their children
- Desire for a cultural landmark to distinguish Market
 - Desire for City to support beautification to improve vibrancy of area

- South Asia/ India gate
- Desire for creating an impact that parallels Chinatown's presence
- Places for small social gathering (e.g. seating areas in the market)
 - To support increased foot traffic and liveliness
- Market to become a tourist destination

Reflections on Cultural Programming


- Cultural events support businesses through increased foot traffic
 - Diwali celebrations, Vaisakhi parades
- Art and beautification of Market are strongly supported
 - South Asia Gate
 - Making the Market feel like a distinctive place
- Broad appreciation for work of Punjabi Market Collective
- Constructive
 - Desire for consultations during parades/events to ensure the businesses aren't negatively impacted

Barriers & Challenges

- Safety
 - Need increased lighting along main and backstreet to address some feeling unsafe at night
- Need for public restrooms
- Parking spaces
 - Lack of reserved parking for business owners/staff
 - Time restricted parking
- Maintenance and street cleaning
 - Maintenance of trees to prevent blocking storefront
 - Need for power washing
- High rent and property taxes
- Desire for business owners to support each other on marketing efforts to bring more customers to the Market
- Licensing of new businesses is time consuming
- Feelings of being over consulted contributing to apprehension in engagement

Personal Contributions to Future Vision

- Broad willingness to invest time and energy e.g. at regular meetings
 - Desire to understand how feedback will be used/ outcomes of engagement
- Some lack of interest due to personal/business commitments
 - Some apathy, sentiment that investing their time and energy into a structure will not bring about change

- 
- Other reflections
 - One business owner with artistic background expressed willingness to provide mentorship around the arts
 - One business owner expressed interest in participating in BIA

Punjabi Market Renewal

Phase 2 Summary Memo

Overview

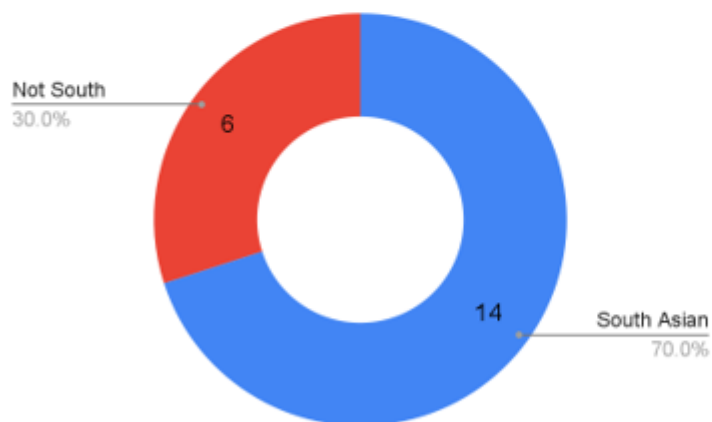
In phase 2 of the Punjabi Market Retail Planning work, Roots & Rivers Consulting engaged business owners to share information about various organizational structures that can support the Market and hear their thoughts on them.

Engagement with business owners included 2 days of drop-in focus group sessions and 1 day of walk-in 1-1 interviews. Focus group sessions included a walk through by Tate Economic Research of informational boards which detailed background on organizational structures including Business Improvement Association, Merchants Association, and Cultural Non-Profit Organization. Business owners were then invited to complete a survey to capture their reflections.

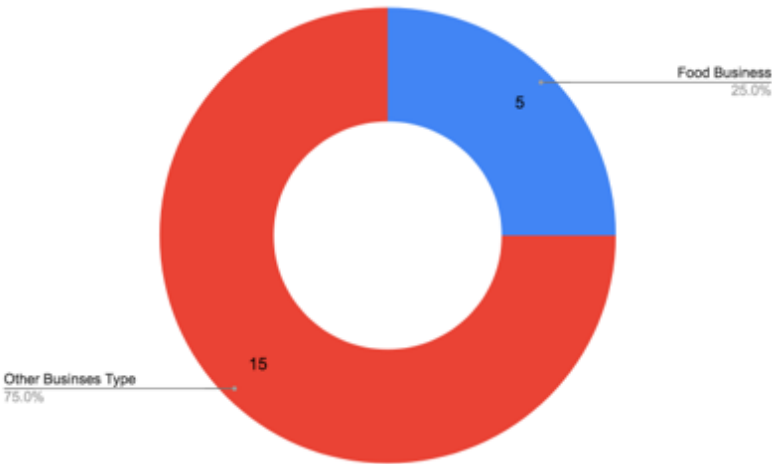
1-1 interviews included a walk through with business owners of a handout with background information, and the survey was conducted thereafter. In total, 20 business owners were engaged. This memo summarizes what we heard from business owners.

Breakdown of Engagement

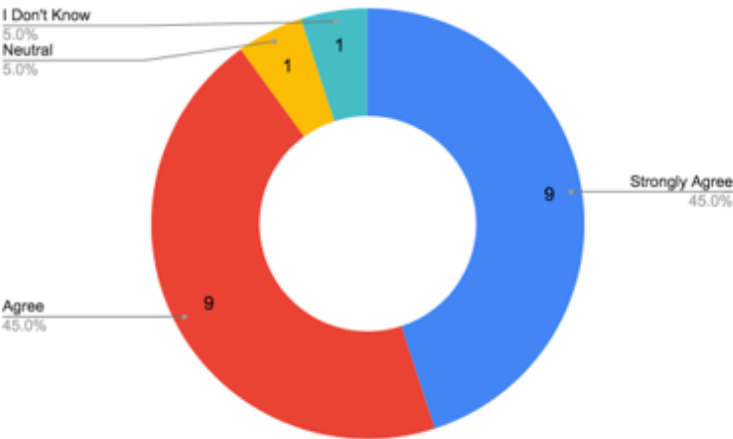
South Asian vs Non-South Asian Orientation of Business



Food Business vs. Non-Food Business Type



Do you agree or disagree that a business focused organizational entity (i.e. Business Improvement Association, Merchants Association, or Cultural Non-Profit Organization) could help strengthen the Punjabi Market?

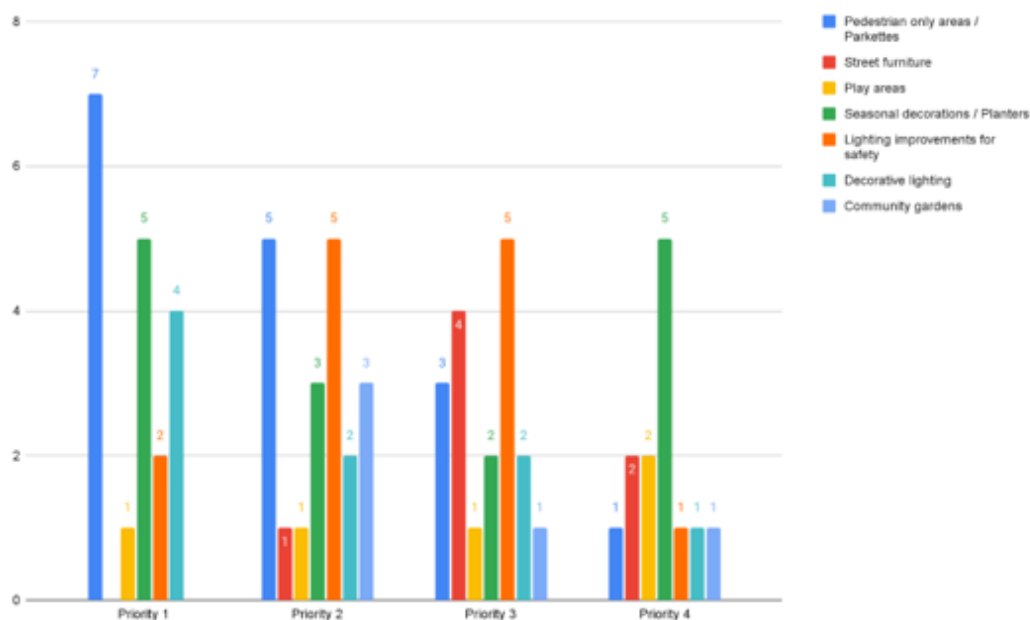


Additional comments on above response

- Unified approach
 - Important to bring business owners together to advance changes in the Market.
- Representation
 - Beneficial to have a group to represent shared interests.
- Need for collective action
 - Collective action needed to preserve and maintain the historic significance of the Market.
- Shared resources
 - Resourcing to support collective actions around advertisement, efforts to increase foot traffic, etc.
- Prospects of overall benefit of an organizational entity
 - Prospect of bringing improvement to the Market.
 - Organized support would be positive.

When thinking about what would help your business and the Punjabi Market overall, please rank the top 4 areas of activity important to you in each area that an organizational entity can implement or advocate for. (1 = most important)

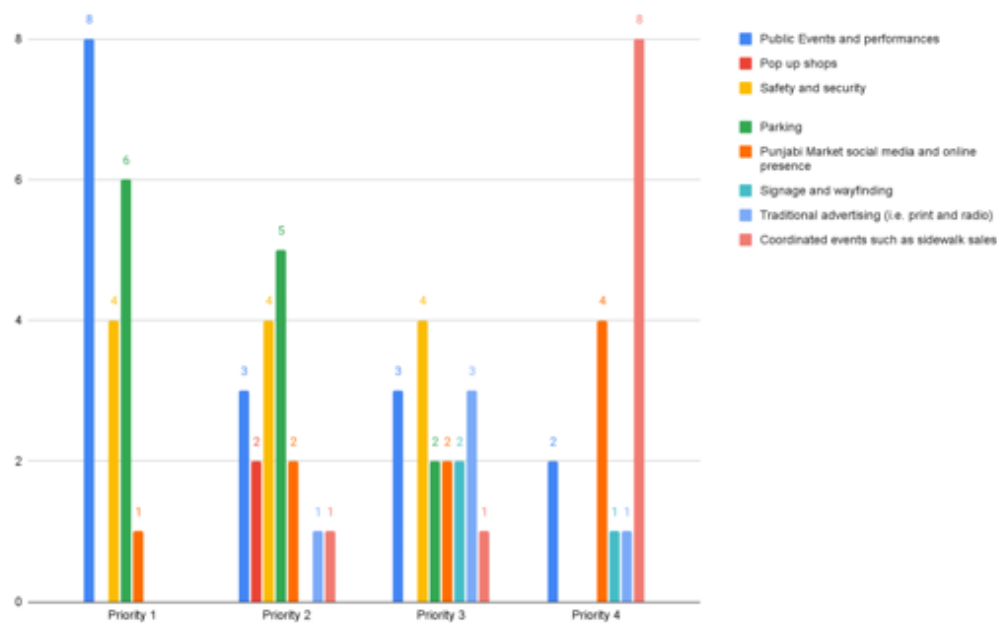
Beautification & Community Spaces



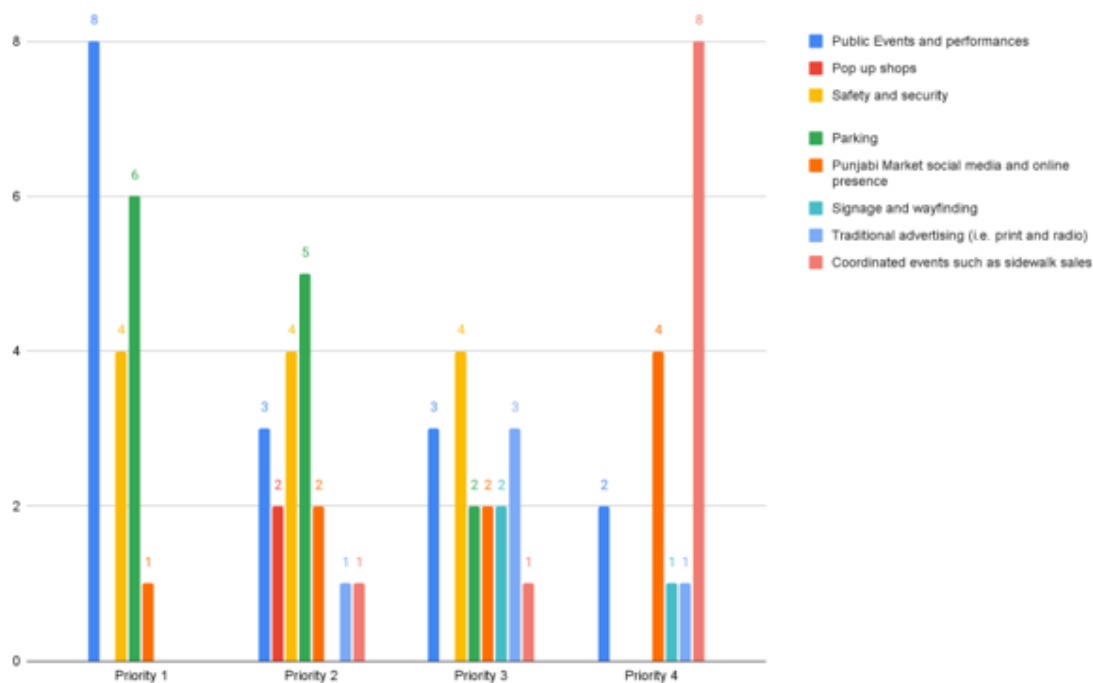
Other comments

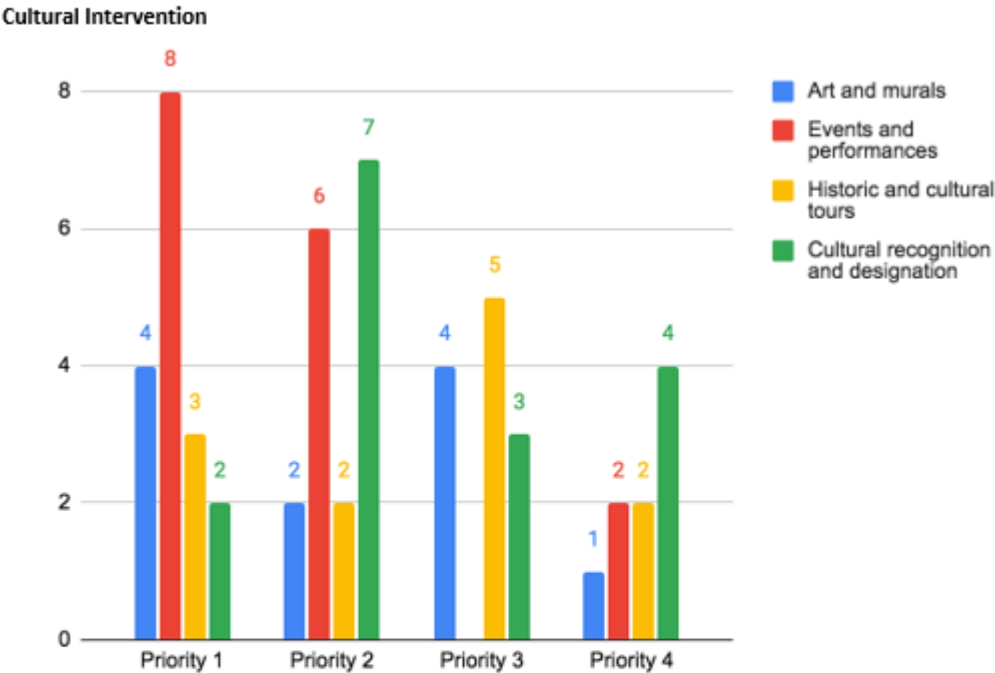
- Traffic light on 50th Ave crosswalk for safety.
- Maintenance and upkeep of the street.
- Need for affordable housing in the area.

Creating More Traffic



Helping Retailers and Landlords

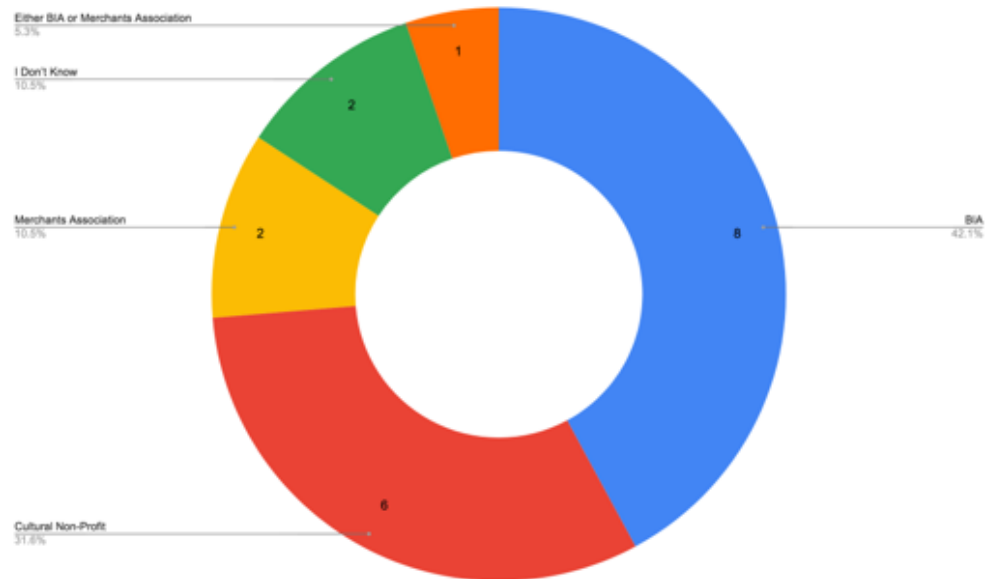




Other comments

- Advancing cultural infrastructure.
- Maintenance and rejuvenation of buildings.

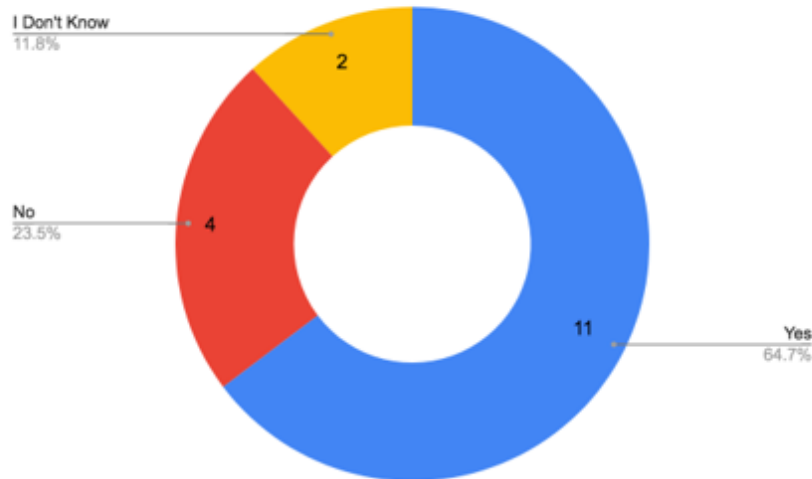
Based on what you've learned, which of the 3 organizational structures identified in the drop-in session do you think would best be able to support Punjabi Market businesses?



Additional comments on above response

- BIA
 - Has most core functions.
 - Suitable to identify competitive actions to strengthen retail scope in Market.
 - Foresee most impact and ability to respond to specific needs of business owners.
- Cultural Non-Profit
 - Foundation of Market is cultural.
 - Supportive to shared interest.
 - Foresee more collective action and including local community involvement.
- Supporting unified approach
 - Advertising efforts would be supportive to increase foot traffic from different areas.
 - More organized as a collective.

Would you be interested in being a part of the structure you identified above?



Why or why not would you be interested in being a part of the structure you identified above?

- Yes
 - Showcasing culture of Punjabi Market.
 - Observing what goes on day-to-day on Main Street.
 - Want to see Market and business owners flourish and be a part of a cultural mosaic.
 - Share challenges and find solutions.
 - Improve future business prospects.
 - Can offer my experiences to share and learn from.
 - Important to be involved.
- No
 - Feel apprehensive to contribute since I'm not Punjabi.

Other thoughts to share

- Need strategy to move forward and show everyone a shared vision.
- Advertisement is a key priority to bring in traffic from wider community outside of Market area.
- Cultural events like Punjabi Market Live have increased foot traffic and outreach.
- Need to support small businesses as much as larger businesses in the Market.
- Have observed caste discrimination among business owners in the Market, leading to apprehension to engaging in a collective organization.
- Opportunity in Market area e.g. new housing developments will bring growth, Langara brings distinct community.
- Punjabi Market is not well known, need efforts to distinguish it as a cultural destination to centre the stories behind the Market.

Appendix C – Opportunities Available to Organizational Entities

Here are Some Ways to Increase Foot Traffic

Intervention	Description
Community Involvement	Engage with local businesses, residents, and organizations to foster a sense of community ownership. Collaborate on events, fundraisers, and initiatives that bring people together and create a positive atmosphere.
Beautification and Cleanliness	Ensure the main street is clean, attractive, and well-maintained. Consider planting flowers, adding public art installations, and regularly removing litter. A clean and visually appealing environment will encourage people to stroll and spend time on the street.
Pedestrian-Friendly Infrastructure	Make the main street pedestrian-friendly by providing ample crosswalks, pedestrian islands, benches, and bike racks. Encouraging walking and cycling will naturally increase foot traffic.
Public Events and Festivals	Organize regular events, festivals, and street fairs on the main street. These can include art exhibits, live performances, food festivals, holiday celebrations, and more. Public events draw large crowds and create buzz around the area.
Live Music and Entertainment	Entertainment Set up designated spaces for live music, street performances, or open mic nights. Live entertainment will attract people looking for a unique experience and help to create a vibrant atmosphere.
Promote Local Businesses	Collaborate with local shops and restaurants to offer special promotions, discounts, or loyalty programs. Cross-promote each other to bring more visitors to the main street and encourage repeat visits.
Social Media and Online Presence	Create a strong online presence for the main street. Utilize social media platforms to share updates, upcoming events, and enticing visuals. Engage with the community online and encourage them to share their experiences using dedicated hashtags.
Signage and Wayfinding	Make sure there are clear and attractive signs directing people to the main street from nearby areas. Effective wayfinding will help visitors discover the street and encourage exploration.
Pop-up Shops and Art Installations	Partner with local artists and entrepreneurs to set up pop-up shops and art installations. These temporary attractions can create excitement and draw new visitors.
Public Transportation and Parking	Ensure that public transportation is easily accessible to the main street. Additionally, provide convenient parking options to make it hassle-free for visitors to reach the area.
Safety and Security	Prioritize safety and security on the main street. Work with local law enforcement and implement measures like improved lighting and surveillance cameras to create a safe environment.
Collect Feedback and Adapt	Regularly gather feedback from visitors, businesses, and residents to understand what they enjoy and what could be improved. Use this information to adapt your strategy and continue enhancing foot traffic.

Here are Some Ways to Influence the Tenant Mix

Intervention	Description
Market Research	Conduct thorough market research to understand the needs and preferences of the local community. Identify the gaps in the current tenant mix and determine the types of businesses that are in demand.
Zoning and Regulations	Familiarize yourself with local zoning laws and regulations that govern the types of businesses allowed on the main street. Work with local authorities to ensure that the zoning supports a diverse and balanced tenant mix.
Attract Anchor Tenants	Seek out anchor tenants, which are large, well-established businesses that can attract significant foot traffic. Anchor tenants can serve as magnets for other smaller businesses, creating a more appealing mix.
Incentives	Offer incentives to attract desired businesses to the main street. This could include financial incentives, reduced rent for the initial period, or assistance with marketing efforts.
Community Engagement	Involve the local community in the decision-making process. Conduct surveys, hold public meetings, and gather feedback to understand what types of businesses residents want to see on the main street.
Encourage Pop-up Shops	Allow temporary pop-up shops to set up on the main street. These short-term tenants can bring variety and novelty to the area and also help test the viability of new business concepts.
Flexible Lease Terms	Offer flexible lease terms to encourage a mix of businesses, including startups and niche ventures that may need shorter lease durations initially.
Curate the Mix	Actively curate the tenant mix to ensure it remains balanced and diverse. Avoid clustering similar businesses together and aim for a complementary mix that enhances each other's offerings.
Street Design and Amenities	Consider the physical layout and design of the main street. Ensure there are ample parking spaces, pedestrian-friendly sidewalks, and attractive public spaces that encourage people to linger and explore.
Collaborate with Local Businesses	Collaborate with existing businesses to identify potential synergies and opportunities for joint promotions or events. This can create a more unified and appealing experience for customers.
Promote Small Businesses	Businesses Emphasize the importance of supporting local small businesses to residents and visitors. Create campaigns that highlight the unique offerings of these businesses and encourage patronage.
Regular Evaluation	Continuously monitor the tenant mix's performance and solicit feedback from businesses and customers. Be ready to make adjustments and adapt to changing market dynamics.

Here are Some Ways a BIA can Facilitate Modernization

Intervention	Description
Technology Adoption	A BIA can organize workshops, training sessions, or provide resources to help businesses adopt modern technologies relevant to their industries. This may include setting up online platforms, digital marketing strategies, or implementing point-of-sale systems.
Networking and Collaboration	By bringing businesses together, a BIA can facilitate networking opportunities and encourage collaboration among businesses. This can lead to knowledge-sharing and the adoption of best practices, which are essential for modernization.
Financial Assistance	A BIA can explore grants, subsidies, or low-interest loan programs to help businesses invest in modernization efforts. Financial assistance can ease the burden of initial costs and encourage businesses to embrace new technologies or upgrade their facilities.
Shared Services	The BIA can explore the possibility of providing shared services for businesses in the area. This could include joint procurement of technology solutions, bulk purchasing discounts, or shared marketing initiatives to promote modernization collectively.
Revitalization Projects	BIA can lead or support revitalization projects aimed at enhancing the overall look and feel of the main street. Beautification efforts can create a more attractive and modern environment, which can positively impact businesses' image and attract customers.
Business Workshops and Seminars	Organize workshops, seminars, and training sessions on various modernization topics, such as e-commerce, social media marketing, sustainability practices, and customer experience enhancement.
Market Research and Data Analysis	A BIA can invest in market research and data analysis to identify emerging trends and customer preferences. This information can help businesses make informed decisions about modernization strategies.
Promotion and Branding	A unified branding and marketing campaign by the BIA can create a modern and cohesive identity for the main street. This can attract new businesses and customers who associate the area with innovation and progress.
Accessibility and Infrastructure	Advocate for improved infrastructure and accessibility on the main street. This could include better parking facilities, bike lanes, public transportation access, and disability-friendly facilities to cater to a wider customer base.
Partnerships with Educational Institutions	Collaborate with local schools, colleges, or universities to create internship programs or offer training opportunities for students interested in business modernization or entrepreneurship. This fosters talent development and can bring fresh ideas to the area.
Public Art and Events	Organize public art installations and events to create a vibrant and modern atmosphere on the main street. Such initiatives can attract foot traffic and enhance the overall appeal of the area. By implementing these strategies, a Business Improvement Area can be instrumental in supporting and accelerating the modernization of businesses on a main street, ensuring their long-term sustainability and competitiveness in today's dynamic market

Here are Some Placekeeping Initiatives to Boost Pedestrian Traffic

Intervention	Description
Pedestrian Zones	Designate certain areas of the main street as pedestrian-only zones, restricting vehicle access during specific times or days. This encourages people to walk, explore, and spend time in a safe and comfortable environment.
Parklets	Create small park-like spaces or seating areas within the main street by repurposing parking spaces. These parklets provide opportunities for rest, relaxation, and socializing, making the area more inviting for pedestrians.
Street Furniture and Amenities	Install benches, bike racks, public art, sculptures, and interactive installations along the main street. These additions make the area more visually appealing and encourage people to linger and enjoy the surroundings.
Pop-up Markets	Organize temporary markets or street fairs that feature local vendors, artisans, food trucks, and entertainment. These events attract a diverse audience and inject vitality into the main street.
Art and Murals	Commission public art and murals that reflect the local culture, history, and values. Colorful and engaging artworks can transform a plain street into a creative and memorable destination.
Wayfinding and Signage	Improve wayfinding by adding clear and attractive signage to guide pedestrians to nearby attractions, shops, and public facilities. Enhanced wayfinding ensures visitors can easily navigate and explore the area.
Outdoor Seating and Dining	Work with local restaurants and cafes to expand their outdoor seating areas. Outdoor dining options create a lively atmosphere and encourage people to walk around and try different establishments.
Play Areas	If possible, incorporate play areas or playgrounds for children. Families with kids are more likely to visit pedestrian-friendly areas with child-friendly spaces.
Seasonal Decorations	Decorate the main street with seasonal themes, such as festive lights during holidays or floral arrangements in spring. These decorations create a sense of occasion and attract visitors.
Community Gardens	Establish community gardens or green spaces along the main street. These areas offer a tranquil escape for people and provide opportunities for community engagement in gardening activities.
Lighting Improvements	Enhance the lighting on the main street, especially during the evening. Well-lit areas feel safer and more inviting, encouraging people to explore after dark.
Public Events and Performances	Host regular events, live performances, and cultural celebrations on the main street. These activities draw large crowds and generate interest in the area.
Active Transportation Initiatives	Promote walking and cycling by providing bike lanes, bike-sharing programs, and hosting group walking or cycling events.
Historic and Cultural Tours	Organize guided tours that highlight the main street's historical and cultural significance. These tours attract curious visitors and provide insights into the area's heritage.
Collaborations with Local Artists and Businesses	Partner with local artists, business owners, and community groups to co-create placemaking initiatives. Their involvement fosters a sense of ownership and pride, making the main street more inviting to others.

Here are Some Ways a BIA can generally Strengthen a Main Street

Intervention	Description
Advocacy and Representation	BIAs act as a unified voice for businesses in the area, advocating for their needs and concerns with local government and other stakeholders. This representation ensures that the main street's interests are taken into account in urban planning, infrastructure development, and policy decisions.
Marketing and Promotion	BIAs engage in marketing and promotional activities to attract visitors and customers to the main street. This can include organizing events, advertising campaigns, social media management, and creating a cohesive brand identity for the area.
Beautification and Streetscape Improvements	BIAs invest in beautification efforts to create an attractive and welcoming main street. This may involve landscaping, public art installations, banners, holiday decorations, and maintaining clean and well-maintained public spaces.
Safety and Security	BIAs often collaborate with local law enforcement to implement safety measures on the main street. This can include improved lighting, surveillance cameras, community patrols, and crime prevention initiatives.
Pedestrian-Friendly Infrastructure	BIAs work to make the main street more pedestrian-friendly, advocating for wider sidewalks, crosswalks, traffic calming measures, and the creation of public spaces and amenities that encourage people to walk and linger.
Business Support and Development	BIAs offer support to local businesses by providing resources, training, and networking opportunities. They may also facilitate partnerships between businesses to foster a stronger local economy.
Events and Programming	BIAs organize events and programs that draw foot traffic to the main street. This can include street festivals, farmers' markets, art walks, concerts, and other activities that create a vibrant and lively atmosphere.
Data Collection and Analysis	BIAs may conduct market research and collect data on foot traffic, customer preferences, and economic trends in the area. This information helps businesses make informed decisions and identify growth opportunities.
Collaboration and Networking	BIAs encourage collaboration and networking among local businesses. By working together, businesses can create synergies, share best practices, and support each other's growth.
Tourism and Economic Development	BIAs often play a role in promoting the main street as a tourist destination, attracting visitors from other areas. Increased tourism can bring new customers and economic opportunities to the local businesses.
Urban Planning and Development	BIAs can provide valuable input during urban planning processes, ensuring that new developments align with the vision and needs of the main street.

Appendix D – BIA Resources

The City of Vancouver has a number of BIA resources that provide important information. These resources include:

Dos and don'ts of BIA formation:

This resource provides a list of items that should be discussed and agreed before and during the process of forming a BIA. This includes subjects such as budget, geographic boundary, and outreach. These are crucial components of an effective BIA.

<https://vancouver.ca/files/cov/bia-do-and-dont.pdf>

Timeline for BIA formation:

This provides prospective BIAs with a timeline of the process that will be undertaken during the formation of the BIA. This is important to help understand what to expect during the process as well as help prospective BIAs prepare.

<https://vancouver.ca/files/cov/bia-formation-timeline.pdf>

Checklist for BIA formation:

This resource provides a comprehensive list of items that must be prepared for every step of the BIA formation process. This allows prospective BIAs to organize important documents and items that are necessary for the formation process.

<https://vancouver.ca/files/cov/bia-formation-checklist.pdf>

Timeline for BIA renewal:

Slightly different to the timeline for BIA formation document, this provides existing BIAs with a timeline of important dates when trying to renew their BIA program with the City. This helps the BIAs up for renewal organize important documents and be prepared for each step of the renewal process.

<https://vancouver.ca/files/cov/bia-renewal-timeline.pdf>

Appendix E – What Other BIA's Spend Their Budgets On

Dunbar Village BIA (Dunbar Village Business Association)

Budget	\$166,250	100%
<i>Promotion</i>	\$72,400	43.5%
<i>Placemaking</i>	\$49,000	29.5%
<i>Community Safety</i>	\$0	0%
<i>Governance</i>	\$44,850	27%
<i>Contingency</i>	\$0	0%
<i>Properties</i>	110	
<i>BIA Rate per \$1000</i>	\$.33	
<i>BIA Levy as % of Tax</i>	3.57%	

Special Events: \$26,000
15.6%

Flower Basket Program: \$14,000
8.4%



Fraser Street BIA (South Hill (Fraser Street) Business Association)

Budget	\$180,000	100%
Promotion	\$29,000	16.1%
Placemaking	\$63,000	35%
Community Safety	\$10,000	5.6%
Governance	\$78,000	43.3%
Contingency	\$0	0%
Properties	89	
BIA Rate per \$1000	\$.51	
BIA Levy as % of Tax	5.48%	

Mural/Steet Art: \$13,600
7.6%

Steet Cleaning: \$19,000
10.6%



Marpole BIA (Marpole Business Association)

Budget	\$208,712	100%
<i>Promotion</i>	\$49,340	23.6%
<i>Placemaking</i>	\$91,600	43.9%
<i>Community Safety</i>	\$0	0%
<i>Governance</i>	\$64,000	30.7%
<i>Contingency</i>	\$3,772	0.2%
<i>Properties</i>	83	
<i>BIA Rate per \$1000</i>	\$.48	
<i>BIA Levy as % of Tax</i>	5.21%	

Street Banners: \$10,000
15.6%



Public Art Program: \$8,600
4.1%



West Broadway BIA (West Broadway Business Improvement Association)

Budget	\$375,000	100%
<i>Promotion</i>	\$82,975	22.1%
<i>Placemaking</i>	\$170,475	45.5%
<i>Community Safety</i>	\$0	0%
<i>Governance</i>	\$115,550	30.8%
<i>Contingency</i>	\$5,000	0.1%
<i>Properties</i>	151	
<i>BIA Rate per \$1000</i>	\$.45	
<i>BIA Levy as % of Tax</i>	4.79%	

Street Lighting: \$120,000
32%

Special Events: \$42,800
11.4%



Chinatown BIA (Vancouver Chinatown BIA Society)

Budget	\$633,330	100%
<i>Promotion</i>	\$141,500	22.3%
<i>Placemaking</i>	\$95,000	29.5%
<i>Community Safety</i>	\$200,000	31.6%
<i>Governance</i>	\$186,830	7.1%
<i>Contingency</i>	\$10,000	0.2%
<i>Properties</i>	202	
<i>BIA Rate per \$1000</i>	\$.68	
<i>BIA Levy as % of Tax</i>	7.31%	

Special Events: \$90,000
14.2%



Mural Project: \$14,000
2.2%



Commercial Drive BIA (Commercial Drive Business Society)

Budget	\$757,350	100%
<i>Promotion</i>	\$110,500	14.6%
<i>Placemaking</i>	\$279,000	36.8%
<i>Community Safety</i>	\$170,000	22.4%
<i>Governance</i>	\$197,850	26.1%
<i>Contingency</i>	\$0	0%
<i>Properties</i>	267	
<i>BIA Rate per \$1000</i>	\$.77	
<i>BIA Levy as % of Tax</i>	8.28%	

Special Events: \$40,000
5.3%



Banners: \$28,000
3.7%

