



# Gastown Pilot Findings

## *Summer 2025*



# Table of Contents

1. Project Overview.....	4
○ Summer 2024 Pilot Learnings.....	5
○ Summer 2025 Pilot Overview.....	6
○ Data Collection Approach.....	8
○ 2025 Key Learnings.....	9
2. Transportation Data Summary.....	10
3. Engagement Summary.....	35
4. Public Life Study.....	80
5. Economic Impact Assessment.....	109
6. Next Steps.....	142



# Project Overview

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# Project Overview

In 2023, Council passed a motion for a **"People-Focused Gastown: A Bold, Forward-Looking Vision for a Vibrant and Prosperous Neighbourhood."** This included direction to develop a Gastown Public Spaces Plan with a design consultancy to **"pedestrianize Water Street and make it car-free or car-light either on a seasonal or year-round basis"** and to test ways to do this through a **summer pedestrian pilot.**



**Plan boundary:** from Richards Street to Main Street and from laneway south of rail tracks to north of Hastings Street

## Legend

- Plan Boundary
- Roadway
- Laneway
- Sidewalk & Public Spaces\*  
\*separated bike lane on Richards & Carrall
- Private Open Space
- Skytrain Station
- Park

## What is a Public Spaces Plan?

It is a Framework to **establish a vibrant, people-focused Gastown** with enhanced gathering places, streets, and laneways that supports a range of activities and guide future investments in the area through:

- **People-first Water St and Maple Tree Square**
- **Improving the street network**, including walking, cycling, transit and vehicle connections and consideration of Cordova as a two-way street.
- **Advancing Reconciliation with the local Nations** and support their visibility on their lands.
- **Evolving and deepening the unique heritage feel** of the area, including improved street materials and amenities.

# Summer 2024 Pilot Learnings

In summer 2024, staff tested a **two-month pedestrian zone** on Water St, designed to enhance the pedestrian experience and support businesses through flexible permitting tools and expanded patios.

The layout included car-free zones at each end of the street, with car-light conditions on the two middle blocks to retain local vehicle access for residents, businesses, and tour bus operations.



## What we learned

### 1. Public Experience

**84% support overall for pedestrian zone** with desire to make it more car-free and more activated along Water St.

### 2. Business Experience

**59% support overall for pedestrian zone**, but with strong split between those who support and those who don't.

**74%** of participating businesses found the **new permitting changes valuable**.

Learnings from the 2024 pilot were [reported back to council in October 2024](#)

### 3. Transportation Network, Access & Circulation

Wider transportation network impacts were **manageable, but further improvements can be made** to address network impacts and business feedback through **additional access and circulation changes**.

### 4. Safety and Cleanliness

**Positive response to cleanliness and safety efforts**; desire to continue and explore additional services.

# Summer 2025 Pilot

Following the 2024 pilot, and based on mixed feedback from businesses, Council provided [preliminary direction](#) to proceed with a revised summer 2025 pilot, that included **a weekends only Pedestrian Zones**. Council also directed Staff to continue development of the Gastown Public Spaces Plan based on results of Summer Pilots, with a multi-modal design for Water Street and Maple Tree Square that creates better walking and cycling connections while retaining local access – but not arterial – motor vehicle traffic. In February 2025, Council approved a **refined approach for the 2025 Gastown Pilot**, developed in collaboration with the Gastown Business Improvement Society (GBIS) and supported by the Gastown Public Spaces Plan’s design and placemaking consultant team. This included testing three key moves:

## 1. Water Street Public Realm Enhancements

- Test expansion of public realm with through-traffic expanded patios, and additional seating
- Create draw beyond Steam Clock to MTSQ
- An eastbound counterflow painted bike lane

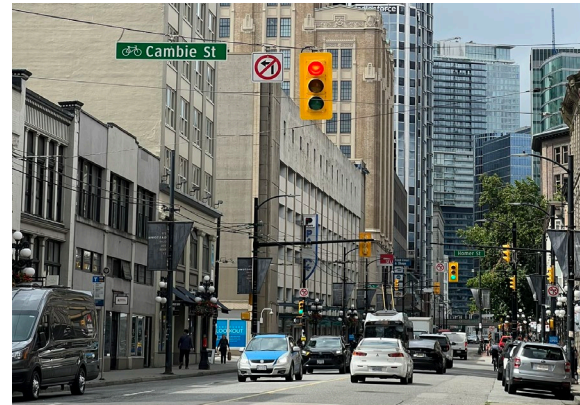
## 2. Two-way Cordova Street

- Improve access & circulation
- Allow reduction of vehicle volumes on Water St & support Pedestrian Zone days

## 3. Sunday Pedestrian Zone Days

- (10 am to 6 pm) from June 15 to August 31
- Test different levels of programming needed for vibrancy
- Ease of set-up/take-down for intermittent Pedestrian Zone

Water St Enhancements



Two-way Cordova St







Sunday Ped Zone Days

# Summer 2025 Pilot Map



## 2025 Gastown Pilot | June to September 2025

### Traffic Circulation

-  Lane reductions - adding left turn lanes
-  Turn restrictions
-  Water Street Pedestrian Zone - every Sunday
-  Two-way traffic on Cordova St
-  Route #50 bus detoured to Cordova St from Water St
-  Eastbound on-street bicycle lane

*\*Throughout the summer, staff will monitor these changes and make adjustments as needed.*

# Data Collection Approach

Staff implemented a comprehensive data collection, monitoring and engagement approach to learn about the public and business experience of the 2025 Gastown pilot, and how this summer compared to summer 2024. This was **developed in collaboration with the Gastown Business Improvement Society (GBIS) to ensure learning goals and metrics were aligned.**

To ensure summer 2025 data could be compared to data from summer 2024, staff used a similar methodology and metrics wherever possible. Learnings from summer 2025, along with learnings from the 2024 pilot, will inform ongoing work on the Gastown Public Spaces Plan which will guide long-term investments in the area.

Data & Monitoring Tactics		Engagement Tactics	
<b>Public Life</b> <b>16 on-site public life observation sessions</b> <b>820+ people via on-site intercept survey (Mustel)</b>	<b>Transportation/Access</b> <b>23 days of traffic counts</b> – including vehicles, bikes and pedestrian on weekdays and weekends on Water St <b>Vehicle counts at key intersections</b> in Gastown, Downtown and DTES <b>GPS data</b> for bus and car travel times	<b>5 community notification letters to 5,000+ addresses</b> <b>50 interactions at 3 pop-up events</b> <b>66 project emails or 3-1-1 cases</b>	
<b>Business Impact</b> <b>Economic Data Analysis, Year over Year sales with POS data</b>		<b>Surveys developed in consultation with GBIS</b>	
		<b>Public</b> <b>718 online survey responses</b> <b>Shared through CoV socials and on-site QR codes</b>	<b>Business Specific</b> <b>64 post pilot online business specific survey</b> <b>50+ virtual interviews and door-knocking with businesses</b>

# 2025 Key Learnings

1. Two-way Cordova St **supported overall network changes.**
2. New **seating and placemaking features were well-received**, and there is a desire for more comfortable public spaces in Gastown.
3. The **Sunday Pedestrian Zone Days created a draw**, but 2025's "event-style" approach to programming was resource-intensive.
4. The **2025 pilot received stronger support from businesses** compared to summer 2024.
5. Gastown businesses **had a stronger economic year in 2025** compared to 2024, although businesses did slightly less well during the pilot months than in 2024.
6. Marketing efforts and **awareness about the pilot have improved** compared to 2024 and have more room to grow.
7. Cycling **infrastructure boosted usage on Water St**, but there is room to improve comfort, safety, and legibility.



# Transportation Data Summary



# Transportation Monitoring Approach

Transportation monitoring gathered a range of data and observations to assess how the 2025 Gastown Pilot and two-way Cordova St changed how people moved in and around Gastown. We used many techniques to monitor multiple modes of transportation:

- **Mid-Block Counts** along Water St to count people walking, riding bikes, and driving cars
- **Intersection Counts** across Gastown and the Downtown Eastside to observe changes in vehicle traffic
- Monitoring at **Tour Bus Zones** to assess the performance of the adjusted regulations
- GPS Data to monitor **vehicle travel times** across Gastown
- **Bus speed and reliability** data from TransLink
- Usage data shared by **EasyPark** and **Mobi**

**2,000+** hours of data collected by the City's Traffic Assistants

Performance data from **15** bus routes through Gastown studied



**160,000+** people walking counted across 6 Sundays on Water St

**43** intersections monitored to understand the impact of two-way Cordova St

# Vehicle Network and Transit Data

# Key Findings – Traffic Changes after Two-Way Cordova

## Westbound Direction

- The new westbound lane on Cordova St was well used and absorbed most of the traffic diverted from Water St

## Eastbound Direction

- The changes on Cordova St resulted in one less lane in the eastbound direction which led to lower volumes as vehicle capacity was constrained
- A 45% drop in vehicle usage was observed on eastbound Cordova St in the PM peak hour

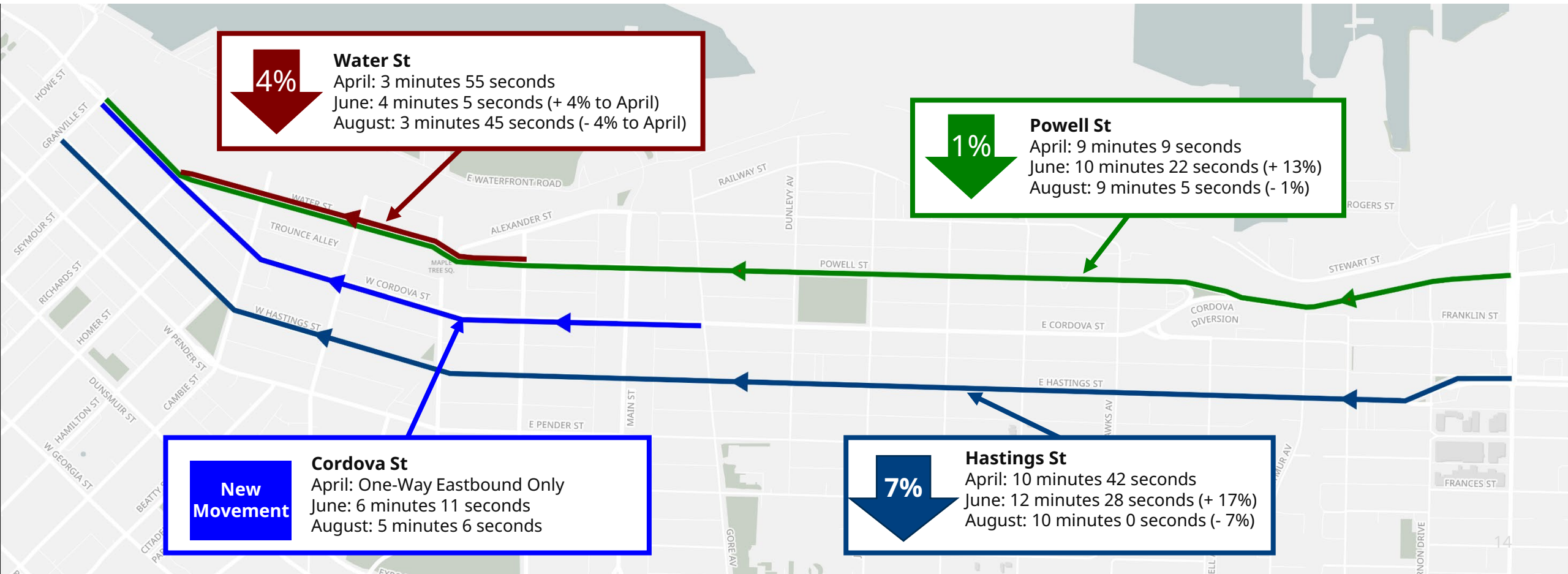
## Sundays

- On Sunday afternoons, when Water St was closed to vehicle traffic, about 300 vehicles per hour used westbound Cordova St as a detour
- Westbound volumes on Hastings St increased by around 50 vehicles per hour during the same period



# Vehicle Travel Times – Westbound – AM Peak Hour

After an initial increase in Westbound vehicle travel times when two-way Cordova St opened, traffic adjusted and **travel times across Gastown improved in August**



**4%**  
**Water St**  
April: 3 minutes 55 seconds  
June: 4 minutes 5 seconds (+ 4% to April)  
August: 3 minutes 45 seconds (- 4% to April)

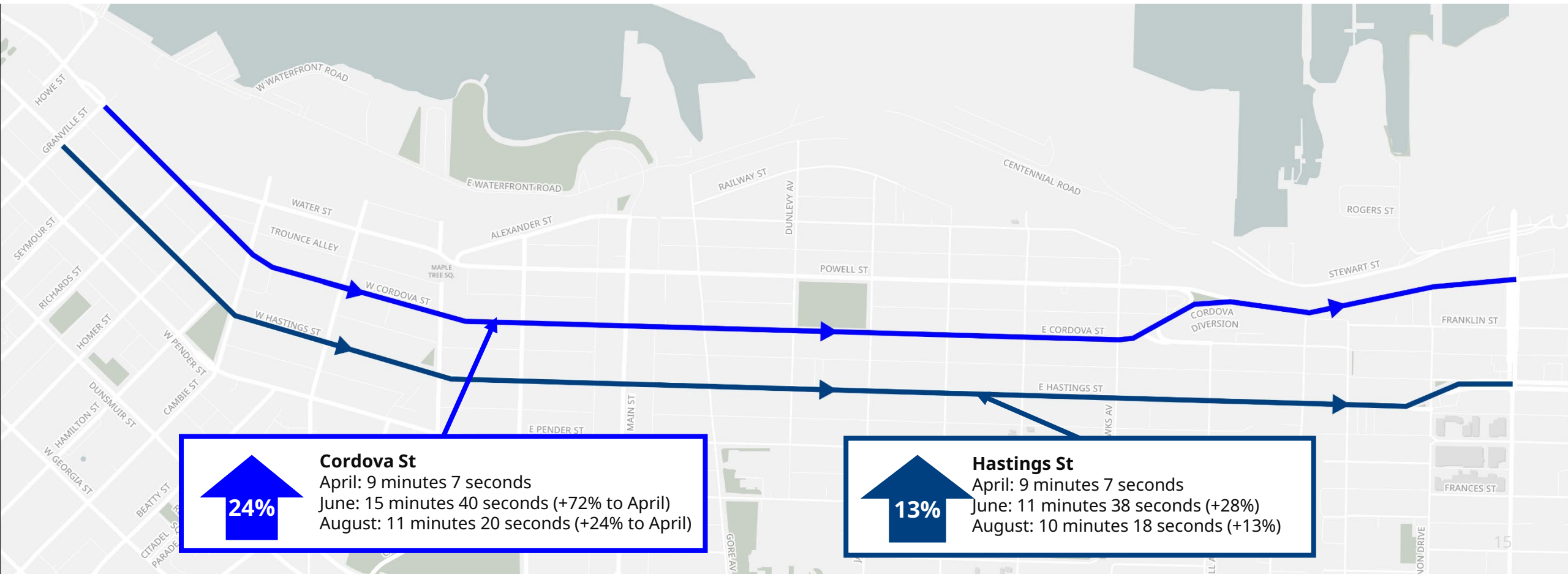
**1%**  
**Powell St**  
April: 9 minutes 9 seconds  
June: 10 minutes 22 seconds (+ 13%)  
August: 9 minutes 5 seconds (- 1%)

**New Movement**  
**Cordova St**  
April: One-Way Eastbound Only  
June: 6 minutes 11 seconds  
August: 5 minutes 6 seconds

**7%**  
**Hastings St**  
April: 10 minutes 42 seconds  
June: 12 minutes 28 seconds (+ 17%)  
August: 10 minutes 0 seconds (- 7%)

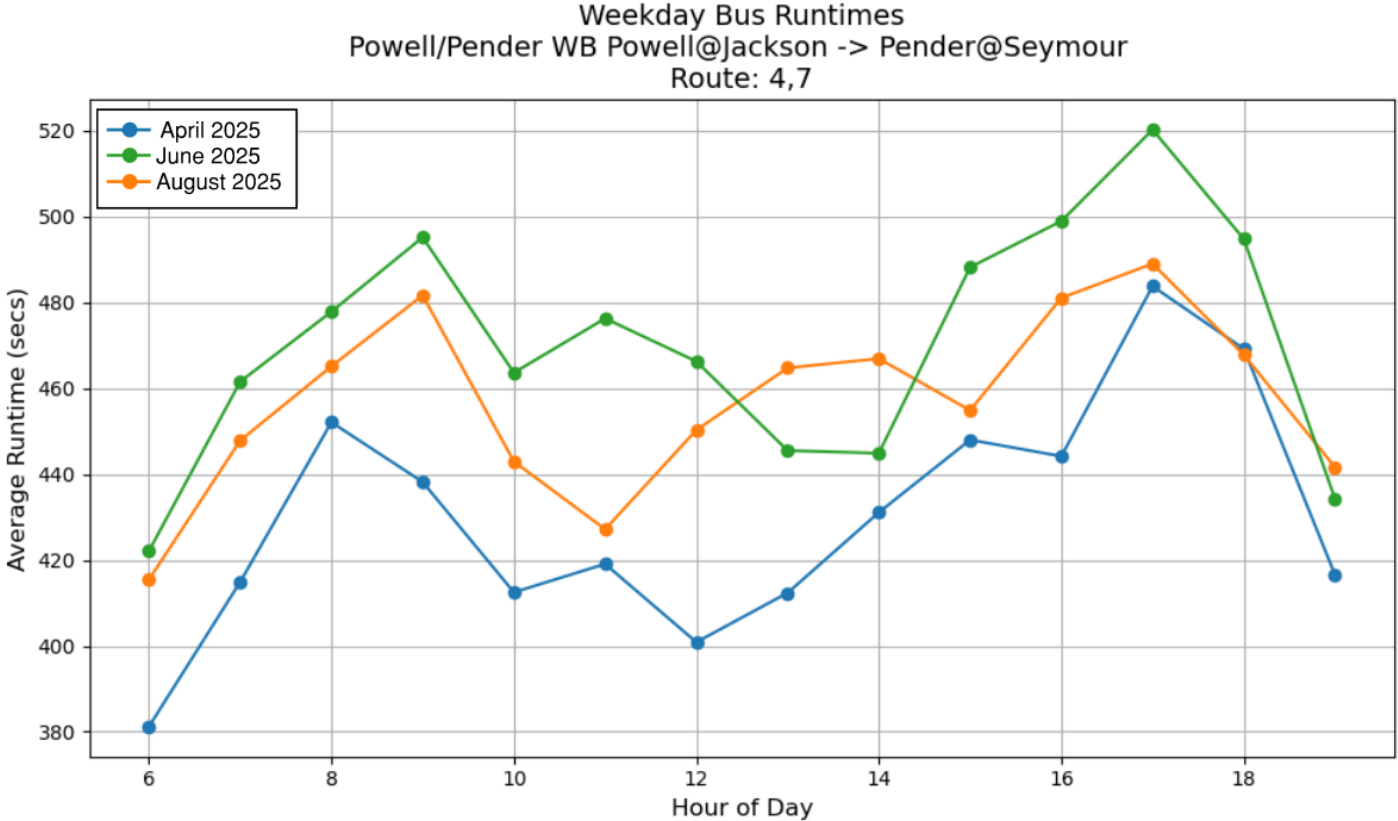
# Vehicle Travel Times – Eastbound – PM Peak Hour

Eastbound vehicle travel times across Gastown increased after two-way Cordova opened. After traffic adjusted, some improvement was seen, but travel times remained higher in August than in April



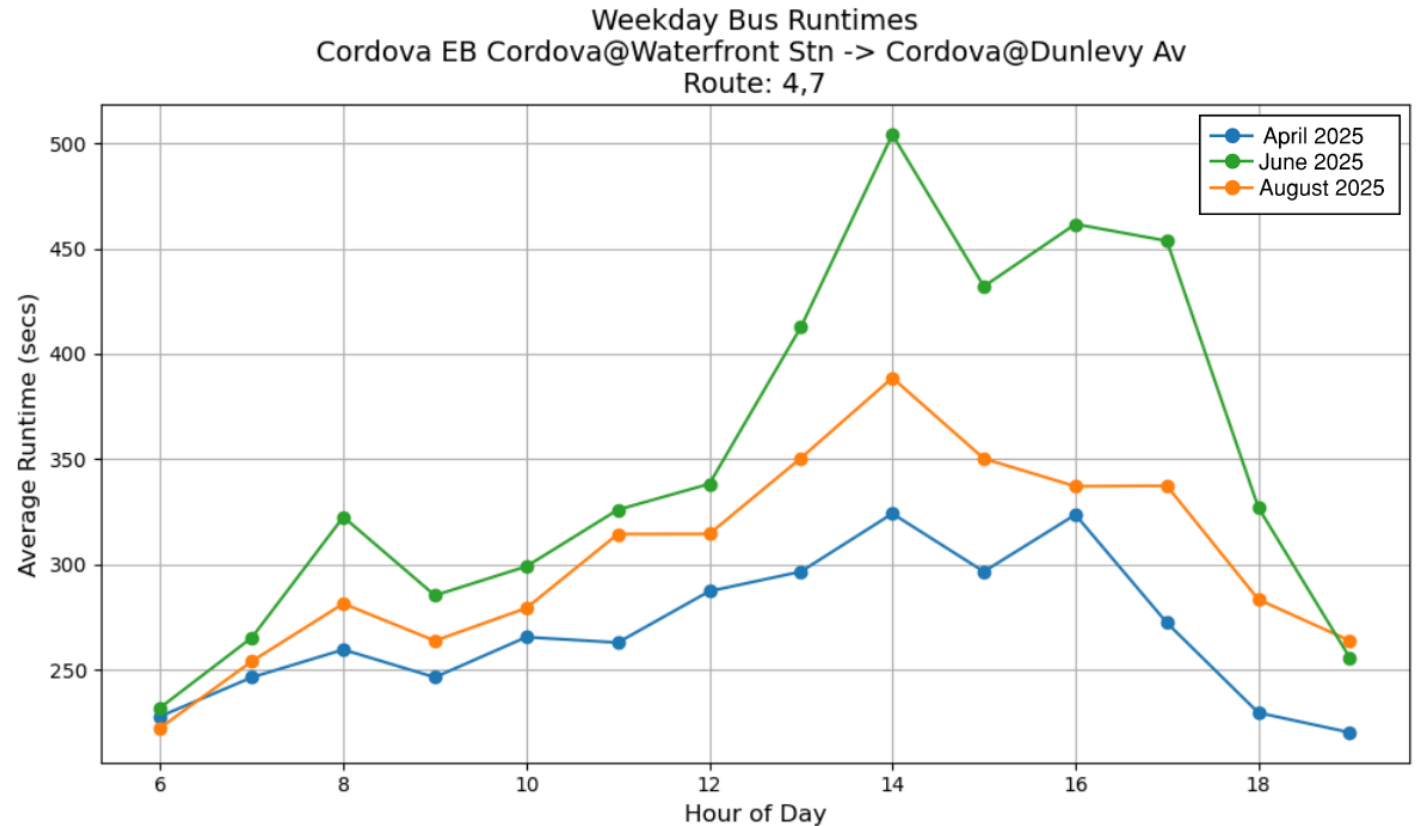
# Bus Travel Time – Routes 4 and 7 – Westbound

- Westbound Buses on Powell St and Pender St saw increased runtimes due to traffic changes
- As traffic adjusted to two-way Cordova, **bus runtimes improved from June to August**



# Bus Travel Time – Routes 4 and 7 – Eastbound

- Eastbound Buses on Cordova St experienced significant slowdowns at the beginning of the Pilot
- The City implemented traffic management changes in response and saw runtimes rebound later in the summer, but buses were still **slightly slower than the baseline**



# AM Traffic Volume Changes

**Legend**

- ← Westbound Traffic on Powell/Water
- ↔ Two-way Traffic on Cordova
- Lane reductions and signal changes

**45%**  
**100 Water (WB)**  
Pre-pilot: 675 veh/hour (AM Peak)  
Pilot: 350 veh/hour (AM Peak)

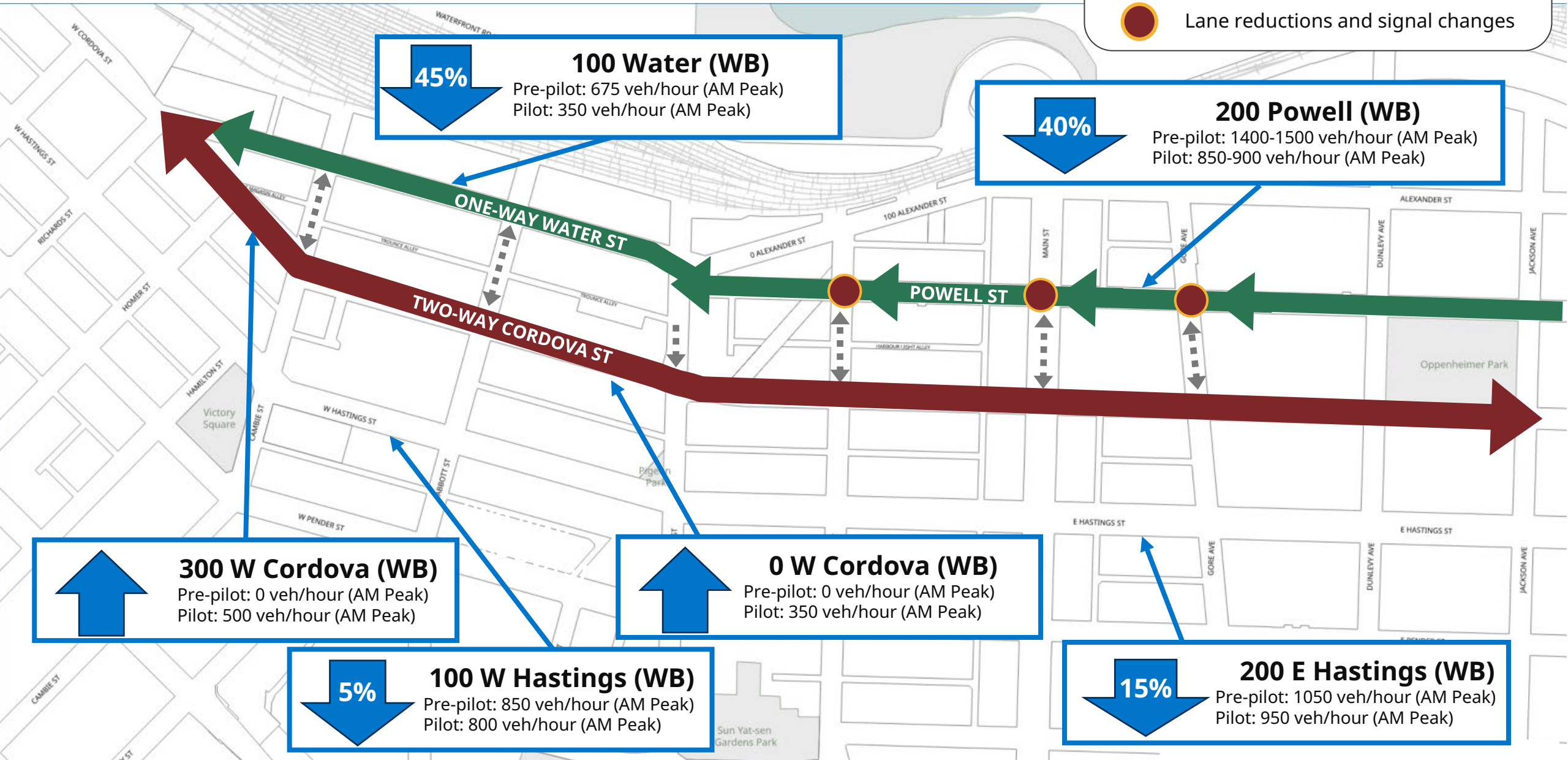
**40%**  
**200 Powell (WB)**  
Pre-pilot: 1400-1500 veh/hour (AM Peak)  
Pilot: 850-900 veh/hour (AM Peak)

**300 W Cordova (WB)**  
Pre-pilot: 0 veh/hour (AM Peak)  
Pilot: 500 veh/hour (AM Peak)

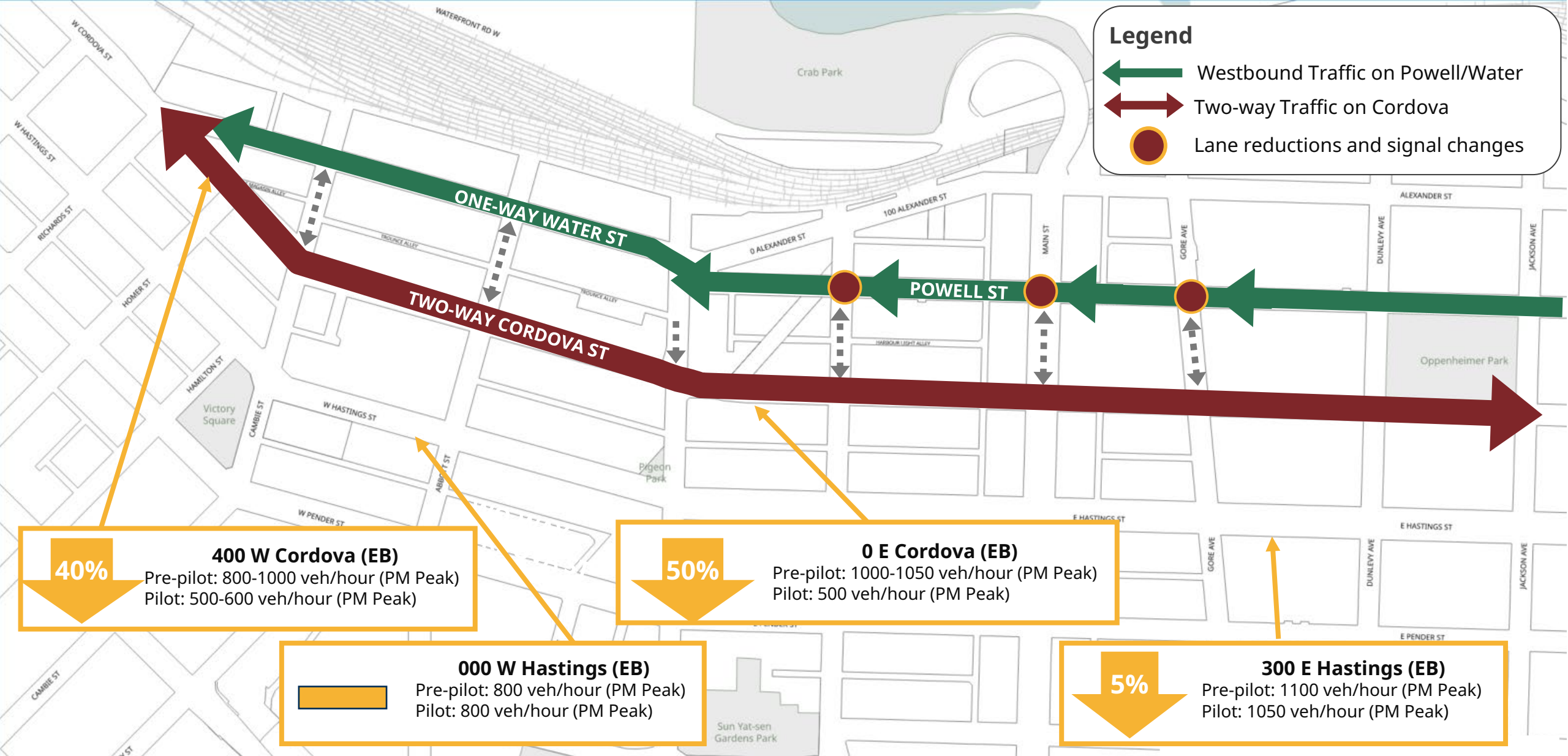
**0 W Cordova (WB)**  
Pre-pilot: 0 veh/hour (AM Peak)  
Pilot: 350 veh/hour (AM Peak)

**5%**  
**100 W Hastings (WB)**  
Pre-pilot: 850 veh/hour (AM Peak)  
Pilot: 800 veh/hour (AM Peak)

**15%**  
**200 E Hastings (WB)**  
Pre-pilot: 1050 veh/hour (AM Peak)  
Pilot: 950 veh/hour (AM Peak)

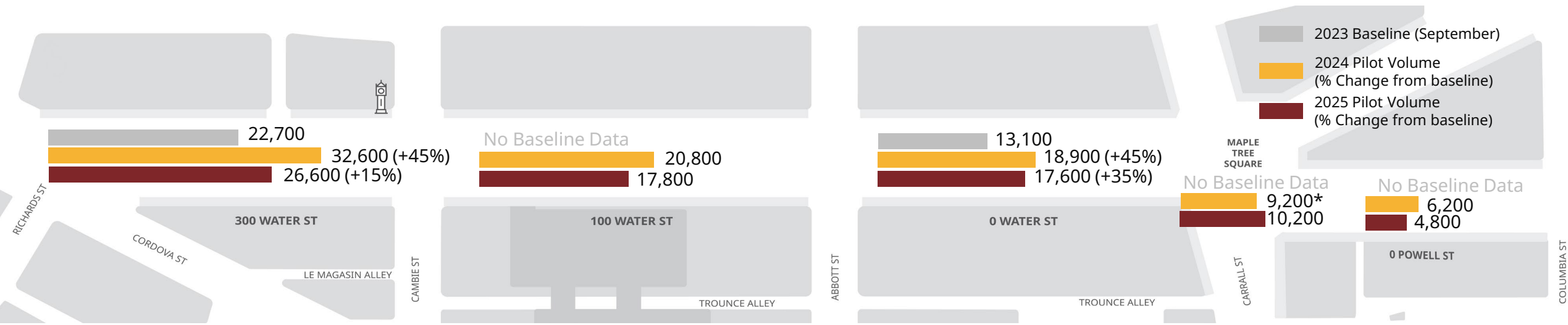


# PM Traffic Volume Changes



# Water St Pedestrian Volume Data

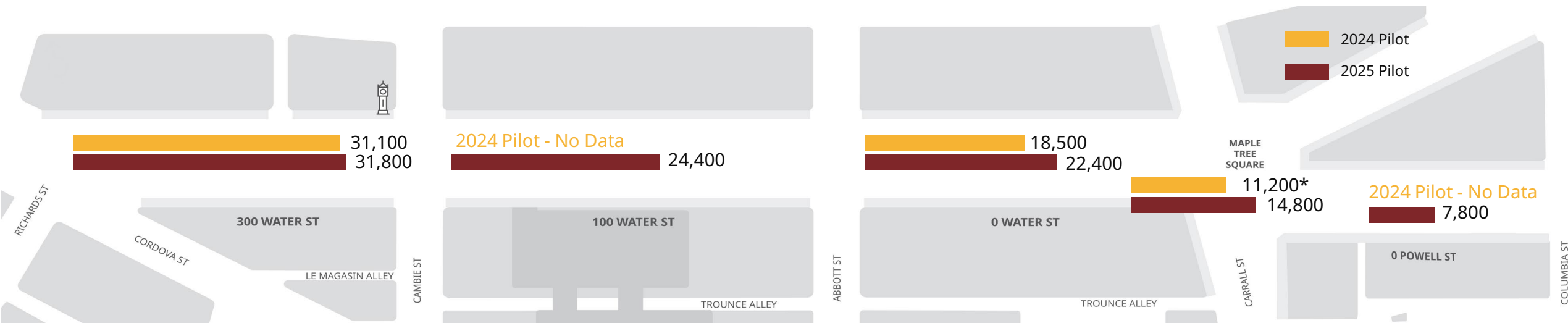
# Weekday Pedestrian Volumes on Water St



\*Note: Count impacted by rain

- **The 2025 Summer Pilot saw a 26% increase in people walking on Water St compared to the 2023 Baseline**
- Around 13% fewer people were observed during the 2025 Summer compared to during the 2024 Summer Pilot

# Sunday Pedestrian Volumes on Water St

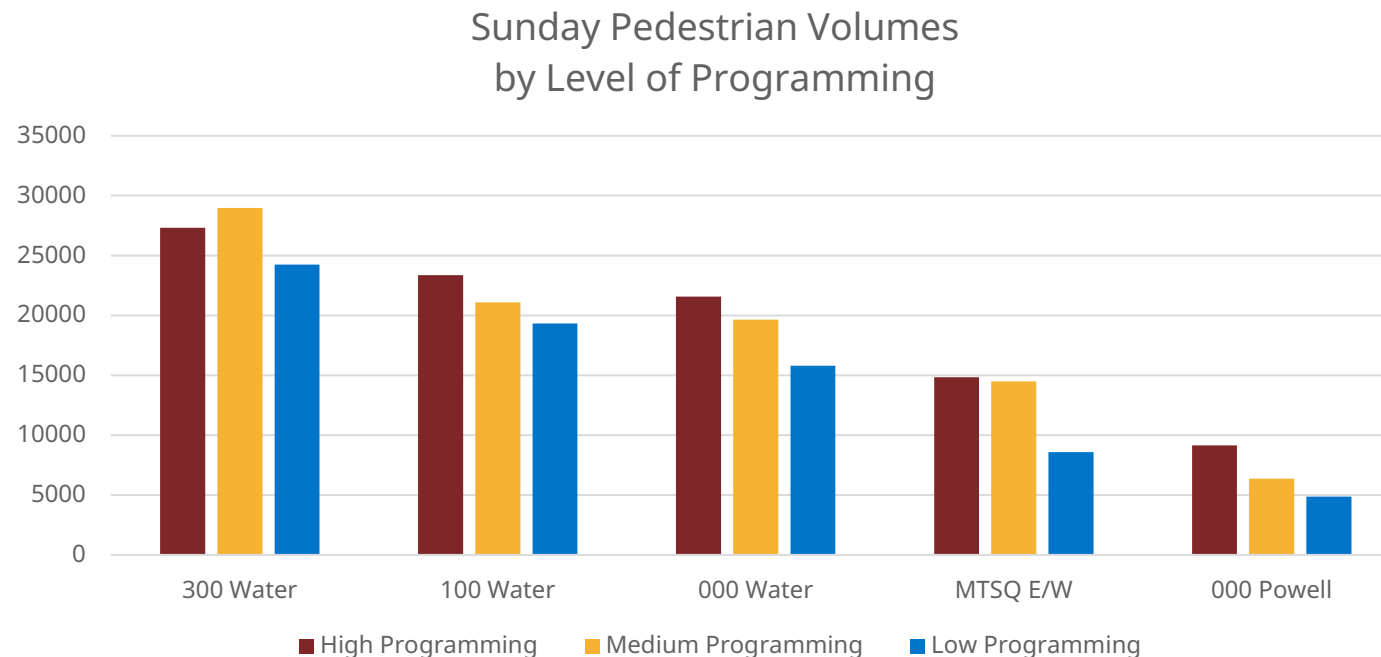


\*Note: Count impacted by rain

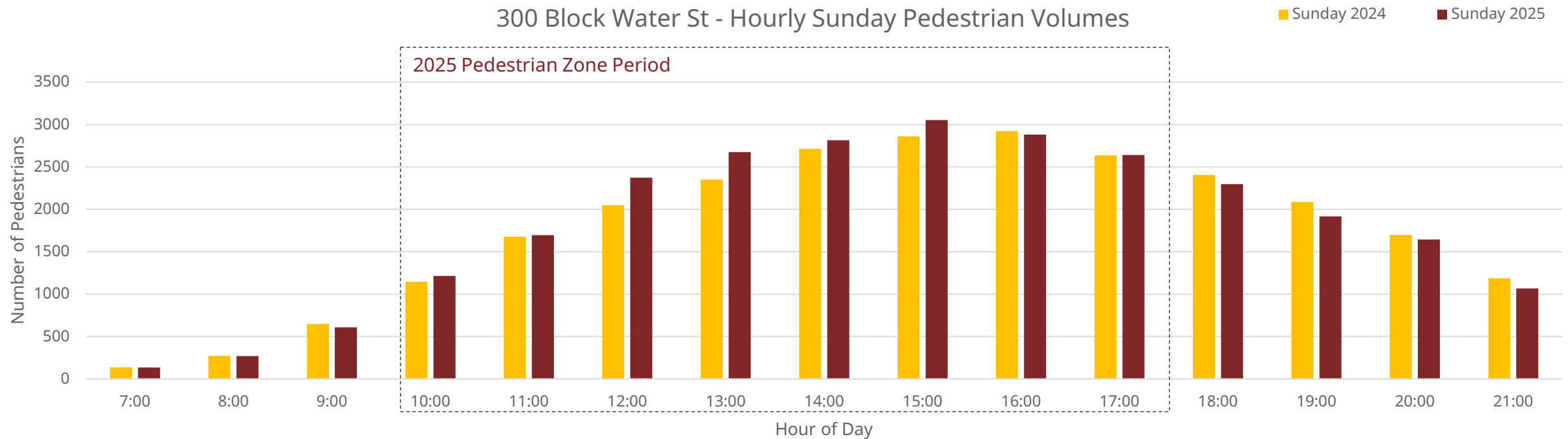
- Sundays saw an increase in activity on Water St during the Pedestrian Zones from 10am to 6pm
- Across the entire day, Sundays during the 2025 pilot saw a 9% increase in pedestrian traffic compared to the 2024 pilot
- **During the hours of the pedestrian zone, a 19% increase from the 2024 pilot was observed**

# Sunday Pedestrian Volumes by Level of Programming

- The City worked with GBIS to support different themed Sundays during the road closures. These can broadly be sorted into three types: **high programming**, **medium programming**, and **low programming**
  - The levels of programming refer to the complexity and resources required for the various activations on each Sunday (i.e. live music, games, market stalls, etc)
- Pedestrian volumes varied across blocks regardless of the level of programming; however, high and medium programming days drew slightly higher numbers of people, with higher levels of programming having the most impact for MTSQ and Powell St.



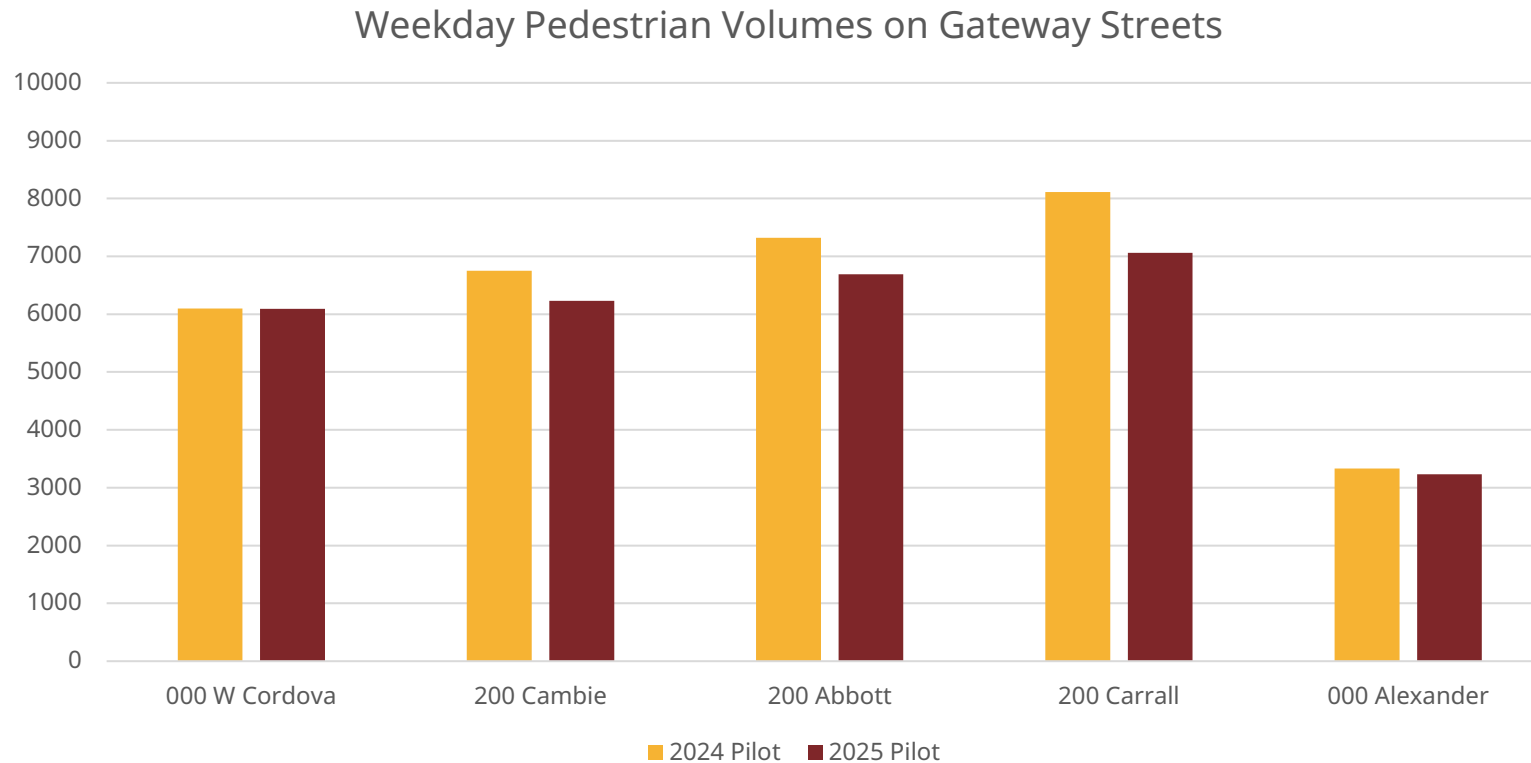
# Sunday Pedestrian Volumes on Water St



- On Sundays, the most activity on Water St was seen from 3pm – 4pm.
- Water St remained an active area for people to gather and walk through into the evening after the pedestrian pilot zone ended at 6pm.

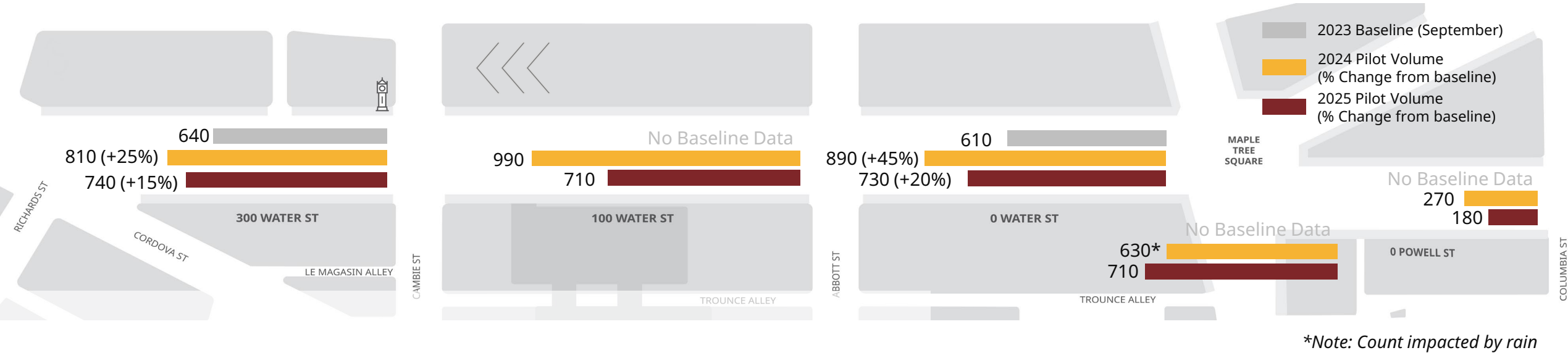
# Weekday Pedestrian Volumes on other Gastown Streets

- The number of pedestrians on other Gastown streets on weekdays was observed to be slightly lower during the 2025 pilot compared to the 2024 pilot



# Bikes and Micromobility

# Daily Weekday Bike and Micromobility Riders on Water St Westbound

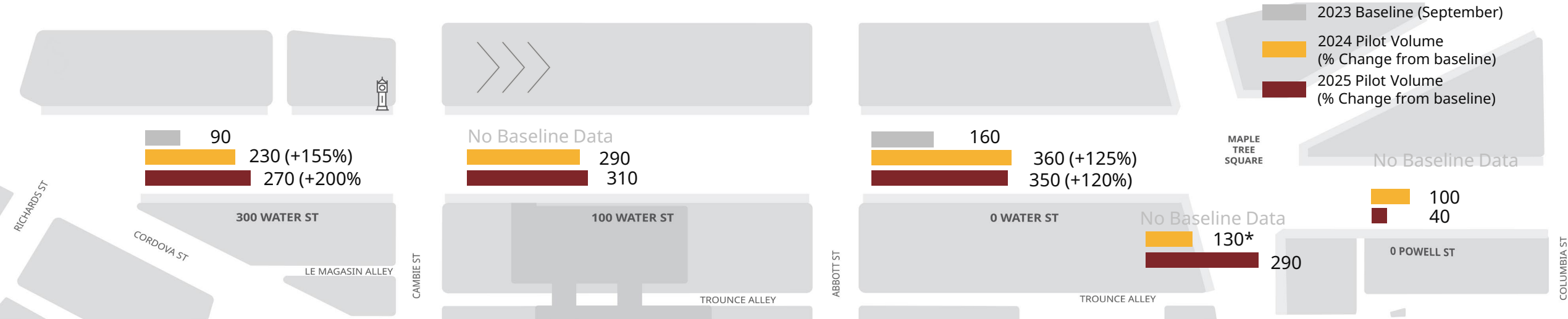


- **Both the 2024 and 2025 Pilots saw more westbound daily bike riders than in 2023**
- There were 18% fewer westbound riders during the 2025 Pilot compared to 2024

## Street Conditions

- 2023 Baseline – People could bike with arterial traffic in the westbound direction
- 2024 Pilot – People could bike on a car-light Water St in both directions
- 2025 Pilot – People could bike on a reduced volume arterial street in the westbound direction

# Daily Bike and Micromobility Riders on Water St Eastbound



- **Both the 2024 and 2025 Pilots saw much more eastbound daily bike riders than in 2023**
- The number of people riding bikes eastbound on Water St during the 2025 Pilot was 8% higher than 2024

## Street Conditions

- 2023 Baseline – People could walk their bikes on the sidewalk in the eastbound direction
- 2024 Pilot – People could bike on a car-light Water St in both directions
- 2025 Pilot – People could bike on counterflow, painted bike lane in the eastbound direction

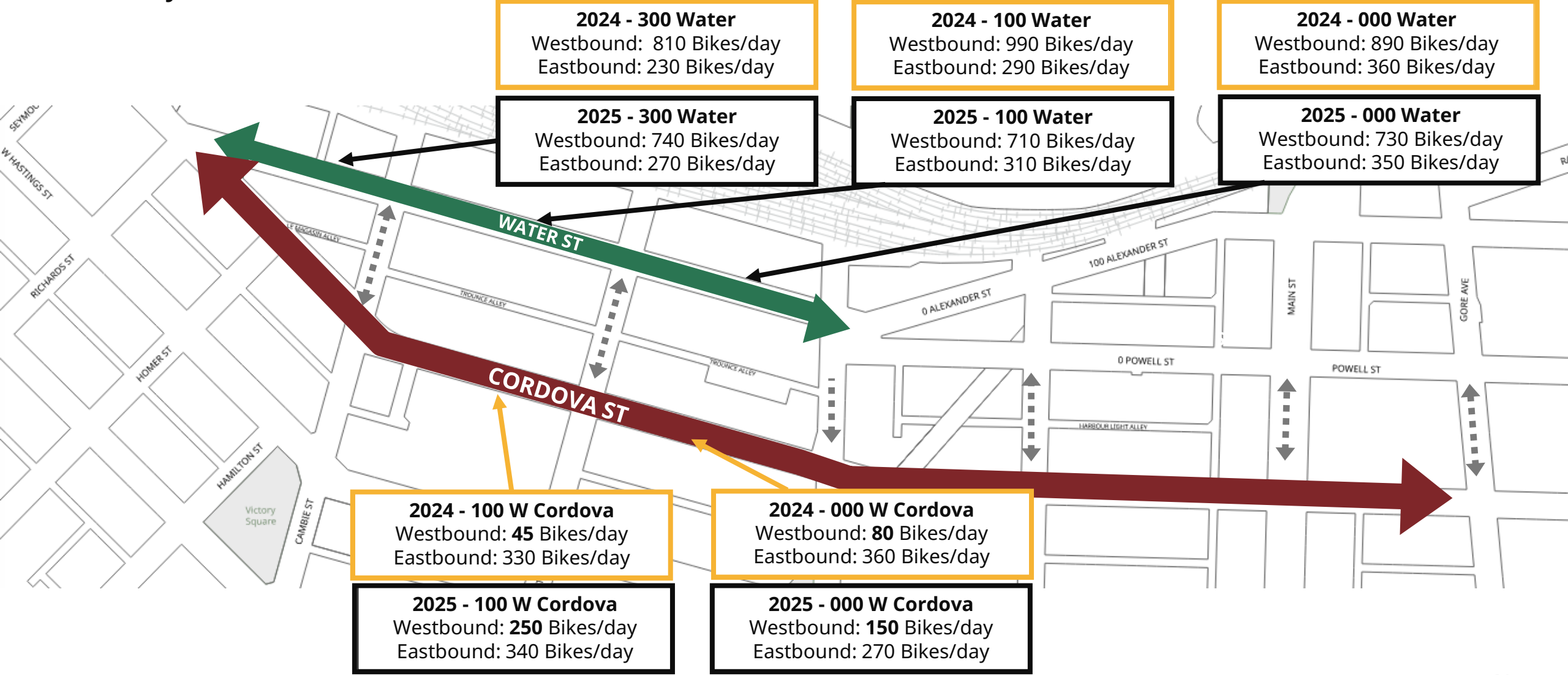
# Water St Painted Bike Lane

- Although the painted lane was only intended for people riding eastwards, some people riding westward chose to use the painted lane instead of the shared roadway
- Riding in the lane, separate from cars, may feel more comfortable for some people
- Others may use the lane to bypass queues of stopped car traffic
- The pilot will inform future design changes



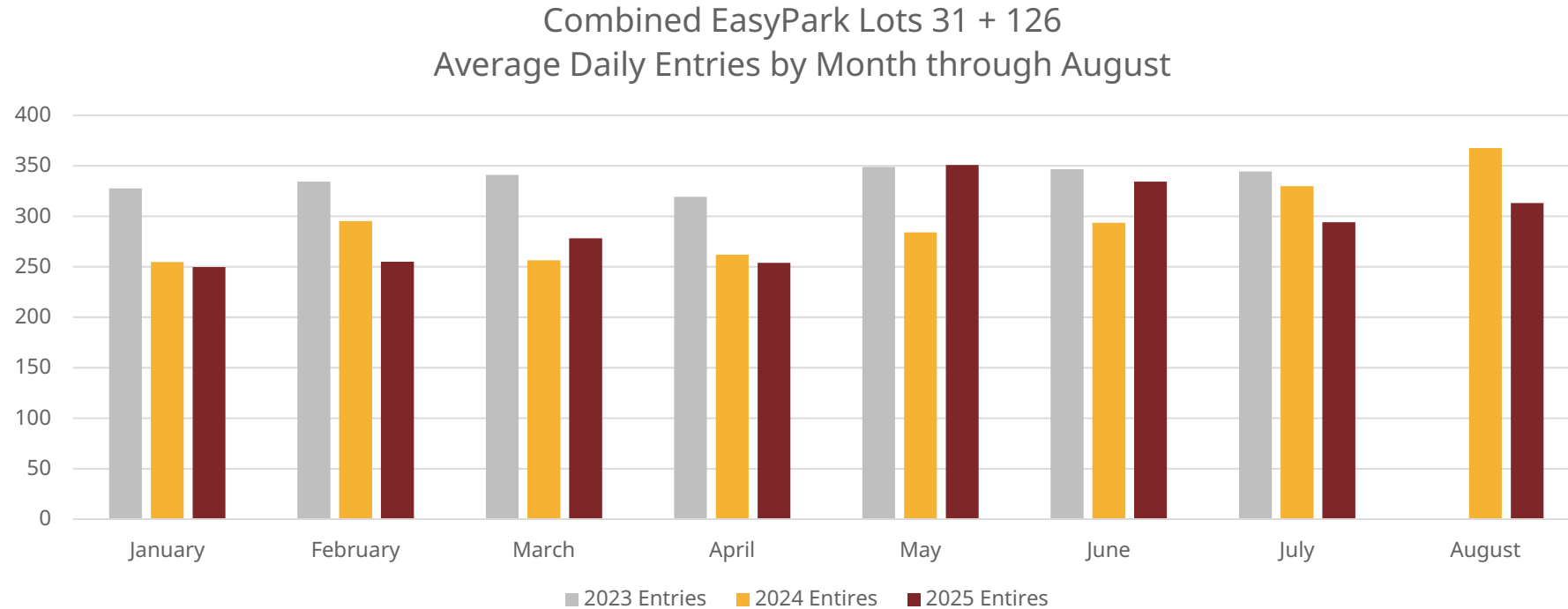
# Daily Volume of Bike and Micromobility Riders on Water St and Cordova St

- More people chose to ride on Cordova St in 2025 in the westbound direction after it became a 2-Way Street



# Off-Street Parking

# EasyPark Lots 31 and 126



- The connected EasyPark lots accessible via Water St and Cordova St saw their number of daily entries vary over the last three years

# Tour Buses

# Tour Bus Summary

- Four tour bus zones were provided in Gastown during the 2025 Pilot: two on Cordova St, one on Richards St, and one on Columbia St
- On weekdays, the stop on Richards St north of Cordova St was the most used of the four stops as most buses drove down Water St before letting passengers get on and off at the Richards St
- On Sundays, while Water St was closed to vehicle traffic, most buses used the two stops on Cordova St

<b>Weekday</b>	300 Richards	400 W Cordova	100 W Cordova	200 Columbia
Number of Buses (7 am to 7 pm)	44	3	8	3
Time limit at Stop (h:mm)	0:03	0:03	0:15	1:00
Average Time at Stop (h:mm)	0:11	0:06	0:41	3:49

<b>Sunday</b>	300 Richards	400 W Cordova	100 W Cordova	200 Columbia
Number of Buses (7 am to 7 pm)	23	30	15	3
Time limit at Stop (h:mm)	0:03	0:03	0:15	1:00
Average Time at Stop (h:mm)	0:14	0:09	0:18	3:30

# Engagement Summary



# Engagement Approach

This engagement focused on gathering input from those most affected and interested in the Water Street enhancements, the Sunday Pedestrian Zone, as well as related traffic changes (e.g., making Cordova Street two-way). We used multiple methods to reach residents, businesses and visitors:

- **Door-to-door outreach** along Water St and Cordova St
- **Pop-up stations** on Water Street during both event and regular days
- An **engagement event** in the Woodward's Atrium
- **Targeted surveys** for community members and businesses

**5** community notification letters  
to **5,000+** addresses

**66** project emails or  
3-1-1 cases



**50+** virtual interviews and  
door-knocking with businesses

**50** interactions at  
3 pop-up events

**718** online community survey  
responses

**64** online business-specific  
survey responses



# Key findings

- **Majority of community** respondents want the pilot to return, **consistent** with last summer (84% for both pilots).
- **Majority of community** respondents had a **positive experience** on Water Street this summer. Experience of car-free Sundays slightly more positive (81%) than more typical Monday – Saturday experience (77%).
- **Majority of community** respondents thought **Sunday programming** was great, but some **community** respondents were **disappointed about the reduced scope** of the pilot.
- **Majority of business** respondents want the pilot to return, with an **increase in support** from last summer from **59% to 81%**.
- **Many businesses** thought public space enhancements such as the seating in Maple Tree Square and Sunday programming was great, but some had concerns with **access to the neighbourhood**, largely related to **traffic management measures** (including prohibited turns)

## What we tested

- Weekly Pedestrian Zone Sundays
- Narrowed Water Street and enhanced public spaces
- Made Cordova two-way between Gore Avenue and Richards Street
- Different types of programming for car-free days



# Public Survey

## What we heard

# Public Survey Overview

Staff conducted a public survey to collect feedback on people's **experience** of the 2025 Gastown pilot.

The public survey was live on Shape Your City from July 15 to September 7 and was promoted through:

- The City's social media channels and website,
- Community notification letters,
- On-site signage and QR codes throughout Gastown,
- Communications through the City's E-newsletter,
- The Gastown Business Improvement Society (GBIS) member newsletter, and
- 3 community pop-up events with over 50 interactions.



# Who we heard from

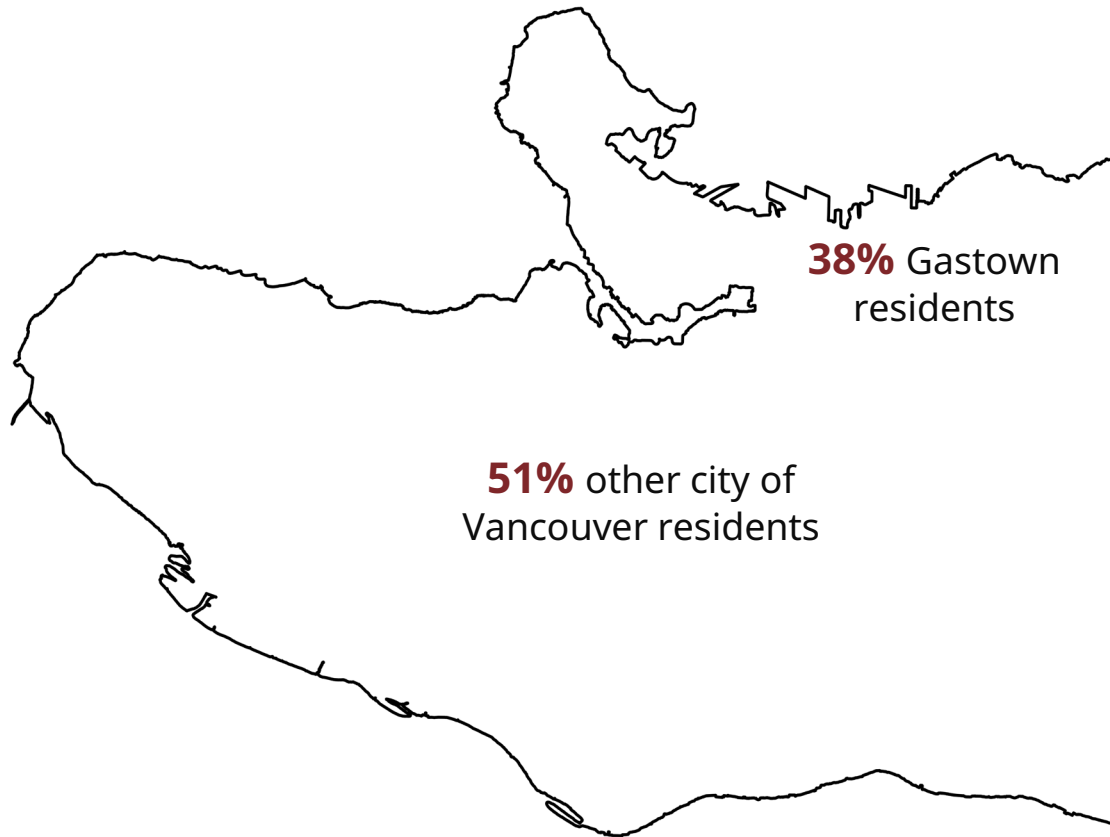
This summer we wanted to hear from **people living, working, visiting and travelling through Gastown.**

Response	Percent	Count
I travel through Gastown	39%	279
I visit Gastown	53%	382
I live in Gastown	38%	273
I work in Gastown	21%	151
I own a business in Gastown	5%	38
I own a building in Gastown	3%	20
None of the above	3%	24



# Who we heard from

This summer, we collected **718** community survey responses. **Almost all respondents (98%) were locals** (within Metro Vancouver, including 38% who live in Gastown and 51% in another city of Vancouver neighbourhood)



## Outside of Vancouver

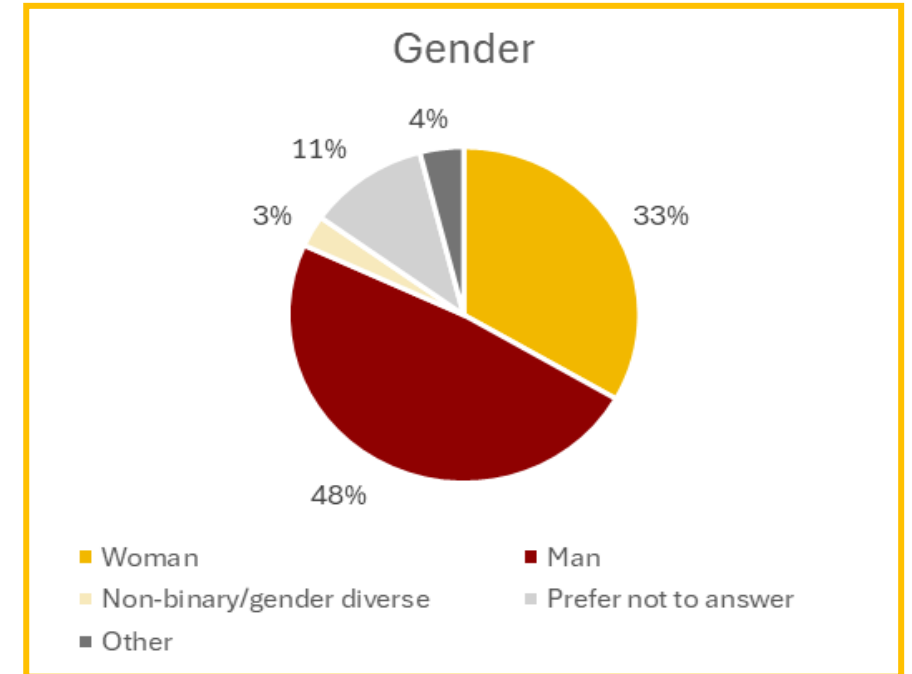
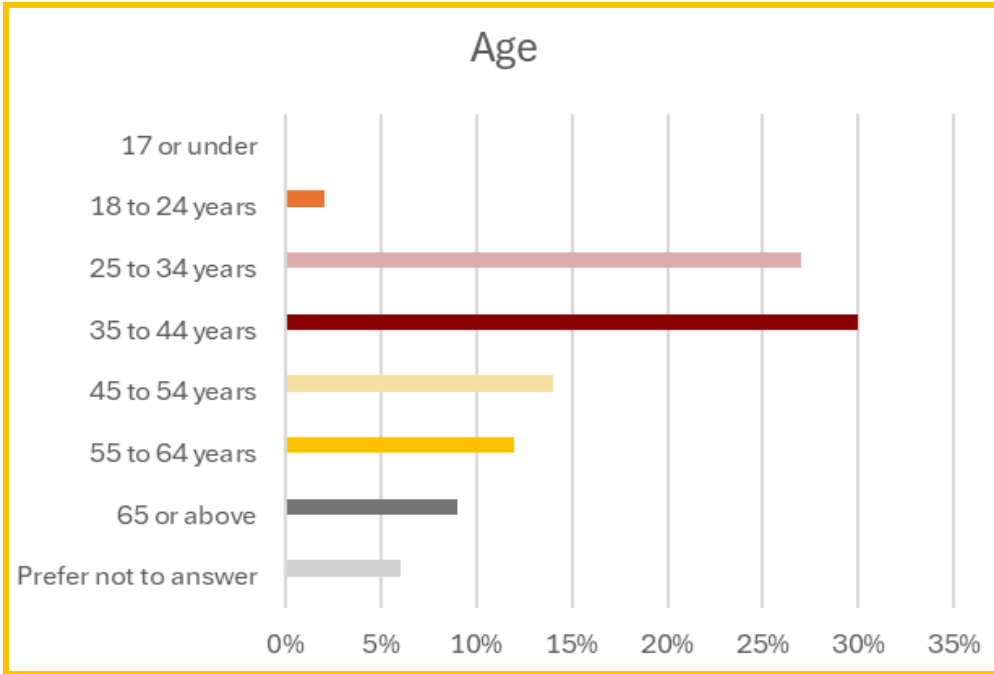
- **9%** other Metro Vancouver municipality
- **1%** elsewhere in BC
- **1%** somewhere else

## Of the 273 respondents that live in Gastown, they live on the following streets:

- **131** Cordova Street
- **53** Alexander Street
- **36** Water Street
- **29** Powell Street
- **24** other

# Who we heard from

We heard from a wide variety of people...



**6%** of community respondents identified as having a **disability, medical condition,** or other **mobility constraint**

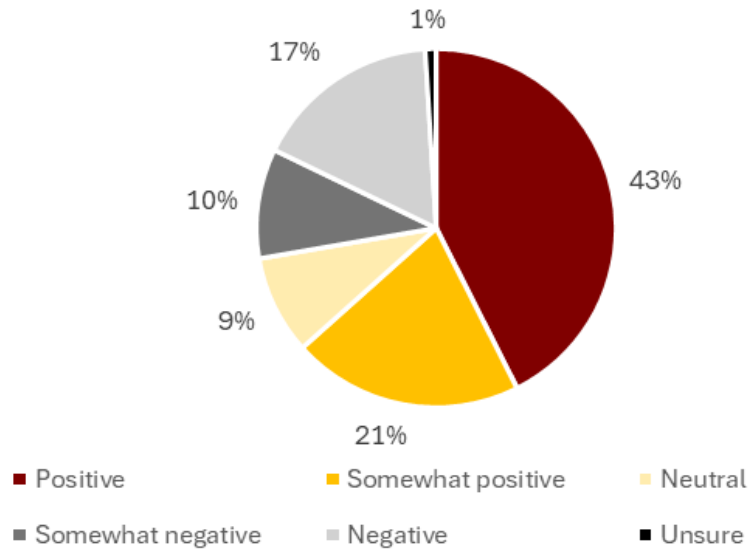


**2%** of community respondents identified as having a **gender different from sex at birth** (also called transgender)

# Getting around Gastown

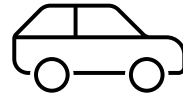


How was your experience getting to and/or travelling through Gastown this summer?



## 89% walked

- 630 walked
- 8 assistive device (wheelchair, walker, etc.)



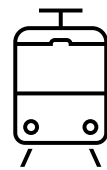
## 62% travelled by vehicle

- 226 private vehicle (driver/passenger)
- 108 taxi or rideshare (Uber, Lyft etc.)
- 107 Car share vehicle (Evo/Modo)
- 1 tour bus



## 58% used active transportation modes

- 368 bike (own bicycle/e-bike, rented/shared bike - Mobi)
- 50 Micromobility device (own scooter/e-scooter, rented/shared scooter - Lime, skateboard, in-line skate, push scooter, etc.)



## 52% took transit

- 187 bus
- 187 Skytrain
- 1 HandyDART

How did you **get around Gastown** this summer?  
*(select all the apply)*

# Public experience: **Water Street**

- **Majority** of community respondents had a **positive** experience on Water Street this summer
- Experience of **Pedestrian Zone Sundays** slightly more positive (81%) than **Monday - Saturday** (77%), with overall slight decrease in support compared to last year (84%)

How was your **experience** on **Water Street** this summer?

Response	Mon - Sat		Car-free Sunday		2024 Survey	
Positive	54%	<b>77%</b>	66%	<b>81%</b>	75%	<b>84%</b>
Somewhat positive	23%		15%		9%	
Somewhat negative	6%	<b>15%</b>	3%	<b>11%</b>	4%	<b>15%</b>
Negative	9%		8%		11%	
Neutral	8%		8%		1%	
Unsure	0%		1%		-	
# of responses*	706		667		1723	

\* number of responses fluctuate due to those that did not experience Mon-Sat Water Street or Sunday car-free Water Street

\*the 2024 pilot was summer long (Monday - Sunday) in July and August 2024

# Public experience: **Transportation**

- **Majority** of community respondents (59%) had a **positive or somewhat positive** experience of how cycling was accommodated on Water St this summer
- About **half** (51%) of community respondents had a positive or somewhat positive experience of two-way Cordova Street and one-third had a negative experience, with residents living on Cordova Street more likely to have a negative or somewhat negative experience (43%)

How was your experience with the way **cycling and micromobility** devices were accommodated on Water Street?

How was your experience on **two-way Cordova Street** this summer?

Response	Cycling		Two-way Cordova	
Positive	41%	<b>59%</b>	40%	<b>51%</b>
Somewhat positive	19%		12%	
Somewhat negative	8%	<b>23%</b>	9%	<b>31%</b>
Negative	15%		22%	
Neutral	12%		16%	
Unsure	5%		2%	
# of responses*	706		667	

\* number of responses fluctuate due to those that did not respond to question on cycling and micromobility, and those that did not experience Cordova Street

# Public experience: Pedestrian Zone return

**Majority** of community respondents want the pedestrian zone to **return**, consistent with last summer (84% both years)

Are you interested in the car-free Water Street Pedestrian Zone **returning** in future summers?

Response	2025		2024 Survey	
Yes	77%	<b>84%</b>	80%	<b>84%</b>
Probably yes	7%		4%	
Probably no	3%	<b>13%</b>	3%	<b>14%</b>
No	10%		11%	
Unsure	4%		2%	

# Public experience: Pedestrian Zone frequency

**Majority** of community respondents want to see the pedestrian zone **expanded**, with **summer-long** leading as the **preferred frequency**

How **often** would you like to see the Water Street Pedestrian Zone in future summers?

Response	Percent	Count
Once a week (e.g., Sunday)	11%	80
Every weekend (e.g., Saturday and Sunday)	18%	128
Summer long (Monday – Sunday)	59%	427
Do not want to see it return	12%	83

# Public experience: **promotions**

**Majority** of community respondents (67%) said the Water Street Pedestrian Zone encouraged them to visit Gastown significantly more or somewhat more often

- **48%** Yes, significantly more often
- **19%** Yes, somewhat more often
- **21%** No, my visits stayed about the same
- **9%** No, I visit less often
- **1%** I don't visit Gastown
- **2%** Not sure

How you heard about Pedestrian Zone Sundays	Percent	Count
<b>City of Vancouver</b> (including Vancouver.ca, Shape Your City, City of Vancouver Instagram, news release, project e-newsletter, notification letter)	46%	332
<b>Social media</b> (Instagram, Facebook, X)	31%	220
<b>Pedestrian signs in Gastown</b>	30%	215
<b>Word of mouth</b>	26%	188
<b>Gastown Business Improvement Society</b> (including gastown.org, mygastown Instagram, member newsletter, Sunday Set posters)	25%	177
<b>Traditional media</b> (including television, radio, print newspaper, online news)	18%	128
<b>Advertising</b> (Curiosity, DO604, Transit Shelter Ad)	5%	38
<b>Don't know/don't remember</b>	6%	40
<b>Other</b>	14%	100

Has the Water Street Pedestrian Zone encouraged you to visit Gastown **more** often?  
*(select one)*

How did you **hear** about the car-free Water Street Pedestrian Zone?  
*(select all that apply)*

# Key themes: likes

What people **liked** (all mentions above 10)

Count	What the community liked about the pilot
330	Car-free/pedestrian only (no traffic, less noise, less pollution)
174	Places to rest/eat (seating, benches, Maple Tree Square feature)
130	Livelier, more vibrant/European atmosphere
114	Sunday programming (24 public disco, 10 artist battle, 8 flower market, 5 unscripted)
101	Safer/more comfortable to walk, roll, ride (barriers, separation from cars)
89	Bike lanes make cycling more safe/comfortable
58	Increased space to walk/move around
48	Patios (larger, more options, activates space)
45	Increased sense of community
45	Two-way Cordova Street (improved access to the area, transit legibility, slower vehicle speeds)
44	Fewer cars (less traffic, less noise, less pollution)
41	Landscaping and increased amount of plants/greenery
39	More people in the area

What are some things you **like** about this summer's pilot?  
*(open-ended response)*

36	Places to hangout, gather and linger in the area (peaceful)
30	Increased sense of safety in the area
26	Street performers
25	More comfortable atmosphere to shop and eat
23	Easier to navigate the area and increased accessibility
18	Vendors on Sundays (market stalls)
17	Supports Gastown businesses (more foot traffic, easier access)
14	Cleaner and upgraded streets/street materials
12	More opportunities to learn about the history of the area
11	Improved access to transit (50 bus shifted to Cordova Street)

# Key themes: dislikes

What people **disliked** (all mentions above 10)

Count	What the community disliked about the pilot
184	Cycling infrastructure (unsafe/confusing)
157	Reduced scope of the pilot (limited car-free hours, limited days)
118	Presence of cars felt unsafe and disruptive (pollution, noise)
95	Vehicle congestion on two-way Cordova Street
65	Conflicts between active transportation users and vehicles
47	Concerns over traffic and circulation (harder to access Gastown, park, make deliveries)
38	Discomfort and safety concerns over presence of homelessness
34	Discomfort and safety concerns over open drug use
30	Time-bound/partial closure felt confusing (weekly switch to car-free)
30	Vehicle congestion on Water Street
28	Difficult to move around for people walking, biking, rolling (shared streets, conflicts, chains/barriers)

What are some things you **dislike** about this summer's pilot?  
*(open-ended response)*

27	Street/sidewalk condition/surface (cracks, uneven surfaces, etc.)
17	Signage (unclear, too much, etc.)
16	Changes to Richards and Cordova intersection (ignoring turn restriction)
15	Car-free area (Sunday experience)
13	Tree removal on Water Street
11	Tour buses (idling, noisy, polluting, drop off zones, blocking road)
10	Increased noise (street performers, crowds, tour buses, street cleaning)
10	Project cost

# Key themes: desired improvements and expansions

What people would like to see **improved or expanded** (all mentions above 10)

Count	What the community would like improved/expanded on
307	Extend Sunday car-free hours (more days, extend hours into the evening)
71	More/better street furniture (seating, tables, better quality and permanent materials)
56	More events, activations, and programming
48	Improve bike infrastructure (protected bike lane, safer, more continuous, better signage)
47	Extend the Pedestrian Zone (make more streets in Gastown car-free)
42	Make it cleaner
40	More pedestrian/car-free areas in Vancouver
30	Increase police/security presence (bylaw/traffic enforcement)
29	Improve street/sidewalk condition/surface (cracks, uneven surfaces, etc.)
27	More landscaping and greenery (better maintain current greenery)
27	Enhance neighbourhood character and showcase history (signage, art, building materials)

What should the City continue to do or **expand on**? How could the City **improve**?  
*(open-ended response)*

23	Support those experiencing homelessness in the area
22	Improve traffic and circulation to the area
20	More shops/restaurant options in the area (food trucks)
19	More vendors on Sundays (market stalls)
17	Increase amount and/or size of patios
17	Improve pedestrian safety (retractable bollards, barriers, traffic calming, lighting)
14	More street performers
12	Increase and improve access to public washroom facilities
10	Let cars move through the space freely again

# Gastown residents

**Majority** of Gastown residents are interested in the car-free Water Street Pedestrian Zone **returning**

Response	All community respondents		All Gastown respondents		Water Street residents		Cordova Street residents	
Yes	77%	<b>84%</b>	77%	<b>82%</b>	75%	<b>86%</b>	77%	<b>83%</b>
Probably yes	7%		6%		11%		6%	
Probably no	3%	<b>12%</b>	3%	<b>13%</b>	6%	<b>6%</b>	5%	<b>14%</b>
No	10%		10%		0%		9%	
Unsure	4%		5%		8%		3%	
# of responses	718		273		36		131	

Are you interested in the car-free Water Street Pedestrian Zone **returning** in future summers?

**Many** Gastown residents had a positive or somewhat positive experience of **two-way Cordova** Street, while Cordova residents were slightly less positive

Response	All community respondents		All Gastown respondents		Water Street residents		Cordova Street residents	
Positive	40%	<b>51%</b>	34%	<b>47%</b>	32%	<b>53%</b>	28%	<b>42%</b>
Somewhat positive	12%		13%		21%		14%	
Somewhat negative	9%	<b>31%</b>	11%	<b>36%</b>	18%	<b>29%</b>	11%	<b>43%</b>
Negative	22%		25%		12%		32%	
Neutral	16%		16%		18%		13%	
Unsure	2%		2%		-		2%	
# of responses	651		236		34		114	

How was your experience on **two-way Cordova Street** this summer?

# Key themes from Gastown residents

Total Survey Results (n=718)		
Rank	Theme	Mentions
<b>Likes</b>		
1	Car-free areas/pedestrian only	330
2	Places to rest/eat	174
3	Livelier, more vibrant/European atmosphere	130
4	Sunday programming	114
5	Safer/more comfortable to walk, roll, ride	101
<b>Dislikes</b>		
1	Cycling infrastructure unsafe/confusing	184
2	Reduced scope of the pilot	157
3	Presence of cars felt unsafe and disruptive	118
4	Vehicle congestion on two-way Cordova Street	95
5	Conflicts between active transportation users and vehicles	65
<b>Improvements</b>		
1	Extend car-free hours	307
2	More/better street furniture	71
3	More events, activations, and programming in Gastown	56
4	Improve bike infrastructure	48
5	Extend the Pedestrian Zone (make more streets in Gastown car-free)	47

Gastown Residents Survey Results (n=273)		
Rank	Theme	Mentions
<b>Likes</b>		
1	Car free areas/pedestrian only	123
2	Places to rest/eat	82
3	Livelier, more vibrant/European atmosphere	48
4	Safer/more comfortable to walk, cycle, use a mobility device	35
5	Two-way Cordova Street	31
<b>Dislikes</b>		
1	Vehicle congestion on two-way Cordova Street	57
2	Reduced scope of the pilot	50
3	Presence of cars felt unsafe and disruptive	34
4	Cycling infrastructure unsafe/confusing	23
5	Discomfort and safety concerns over open drug use	22
<b>Improvements</b>		
1	Extend car-free hours	110
2	More/better street furniture	32
3	Make it cleaner	26
4	More events, activations, and programming in Gastown	25
5	Improve bike infrastructure	25

# Public experience: **Water Street**

- **Majority** of community respondents had a **positive** experience on Water Street this summer
- Experience of **Pedestrian Zone Sundays slightly more positive** (81%) than **Monday - Saturday** (77%), with overall slight decrease in support compared to last year (84%)

How was your **experience** on **Water Street** this summer?

Response	Mon - Sat		Car-free Sunday		2024 Survey	
Positive	54%	<b>77%</b>	66%	<b>81%</b>	75%	<b>84%</b>
Somewhat positive	23%		15%		9%	
Somewhat negative	6%	<b>15%</b>	3%	<b>11%</b>	4%	<b>15%</b>
Negative	9%		8%		11%	
Neutral	8%		8%		1%	
Unsure	0%		1%		-	
# of responses*	706		667		1723	

\* number of responses fluctuate due to those that did not experience Mon-Sat Water Street or Sunday car-free Water Street

\*the 2024 pilot was summer long (Monday - Sunday) in July and August 2024

# Public experience: **Transportation**

- **Majority** of community respondents (59%) had a **positive or somewhat positive** experience of how cycling was accommodated on Water St this summer
- About **half** (51%) of community respondents had a positive or somewhat positive experience of two-way Cordova Street and one-third had a negative experience, with residents living on Cordova Street more likely to have a negative or somewhat negative experience (43%)

How was your experience with the way **cycling and micromobility** devices were accommodated on Water Street?

How was your experience on **two-way Cordova Street** this summer?

Response	Cycling		Two-way Cordova	
Positive	41%	<b>59%</b>	40%	<b>51%</b>
Somewhat positive	19%		12%	
Somewhat negative	8%	<b>23%</b>	9%	<b>31%</b>
Negative	15%		22%	
Neutral	12%		16%	
Unsure	5%		2%	
# of responses*	706		667	

*\* number of responses fluctuate due to those that did not respond to question on cycling and micromobility, and those that did not experience Cordova Street*

# Public experience: Pedestrian Zone return

**Majority** of community respondents want the pedestrian zone to **return**, consistent with last summer (84% both years)

Are you interested in the car-free Water Street Pedestrian Zone **returning** in future summers?

Response	2025		2024 Survey	
Yes	77%	<b>84%</b>	80%	<b>84%</b>
Probably yes	7%		4%	
Probably no	3%	<b>13%</b>	3%	<b>14%</b>
No	10%		11%	
Unsure	4%		2%	

# Public experience: Pedestrian Zone frequency

**Majority** of community respondents want to see the pedestrian zone **expanded**, with **summer-long** leading as the **preferred frequency**

How **often** would you like to see the Water Street Pedestrian Zone in future summers?

Response	Percent	Count
Once a week (e.g., Sunday)	11%	80
Every weekend (e.g., Saturday and Sunday)	18%	128
Summer long (Monday – Sunday)	59%	427
Do not want to see it return	12%	83

# Public experience: **promotions**

**Majority** of community respondents (67%) said the Water Street Pedestrian Zone encouraged them to visit Gastown significantly more or somewhat more often

- **48%** Yes, significantly more often
- **19%** Yes, somewhat more often
- **21%** No, my visits stayed about the same
- **9%** No, I visit less often
- **1%** I don't visit Gastown
- **2%** Not sure

How you heard about Pedestrian Zone Sundays	Percent	Count
<b>City of Vancouver</b> (including Vancouver.ca, Shape Your City, City of Vancouver Instagram, news release, project e-newsletter, notification letter)	46%	332
<b>Social media</b> (Instagram, Facebook, X)	31%	220
<b>Pedestrian signs in Gastown</b>	30%	215
<b>Word of mouth</b>	26%	188
<b>Gastown Business Improvement Society</b> (including gastown.org, mygastown Instagram, member newsletter, Sunday Set posters)	25%	177
<b>Traditional media</b> (including television, radio, print newspaper, online news)	18%	128
<b>Advertising</b> (Curiosity, DO604, Transit Shelter Ad)	5%	38
<b>Don't know/don't remember</b>	6%	40
<b>Other</b>	14%	100

Has the Water Street Pedestrian Zone encouraged you to visit Gastown **more** often?  
*(select one)*

How did you **hear** about the car-free Water Street Pedestrian Zone?  
*(select all that apply)*

# Key themes: likes

What people **liked** (all mentions above 10)

Count	What the community liked about the pilot
330	Car-free/pedestrian only (no traffic, less noise, less pollution)
174	Places to rest/eat (seating, benches, Maple Tree Square feature)
130	Livelier, more vibrant/European atmosphere
114	Sunday programming (24 public disco, 10 artist battle, 8 flower market, 5 unscripted)
101	Safer/more comfortable to walk, roll, ride (barriers, separation from cars)
89	Bike lanes make cycling more safe/comfortable
58	Increased space to walk/move around
48	Patios (larger, more options, activates space)
45	Increased sense of community
45	Two-way Cordova Street (improved access to the area, transit legibility, slower vehicle speeds)
44	Fewer cars (less traffic, less noise, less pollution)
41	Landscaping and increased amount of plants/greenery
39	More people in the area



36	Places to hangout, gather and linger in the area (peaceful)
30	Increased sense of safety in the area
26	Street performers
25	More comfortable atmosphere to shop and eat
23	Easier to navigate the area and increased accessibility
18	Vendors on Sundays (market stalls)
17	Supports Gastown businesses (more foot traffic, easier access)
14	Cleaner and upgraded streets/street materials
12	More opportunities to learn about the history of the area
11	Improved access to transit (50 bus shifted to Cordova Street)

# Key themes: dislikes

What people **disliked** (all mentions above 10)

Count	What the community disliked about the pilot
184	Cycling infrastructure (unsafe/confusing)
157	Reduced scope of the pilot (limited car-free hours, limited days)
118	Presence of cars felt unsafe and disruptive (pollution, noise)
95	Vehicle congestion on two-way Cordova Street
65	Conflicts between active transportation users and vehicles
47	Concerns over traffic and circulation (harder to access Gastown, park, make deliveries)
38	Discomfort and safety concerns over presence of homelessness
34	Discomfort and safety concerns over open drug use
30	Time-bound/partial closure felt confusing (weekly switch to car-free)
30	Vehicle congestion on Water Street
28	Difficult to move around for people walking, biking, rolling (shared streets, conflicts, chains/barriers)



27	Street/sidewalk condition/surface (cracks, uneven surfaces, etc.)
17	Signage (unclear, too much, etc.)
16	Changes to Richards and Cordova intersection (ignoring turn restriction)
15	Car-free area (Sunday experience)
13	Tree removal on Water Street
11	Tour buses (idling, noisy, polluting, drop off zones, blocking road)
10	Increased noise (street performers, crowds, tour buses, street cleaning)
10	Project cost

# Key themes: desired improvements and expansions

What people would like to see **improved or expanded** (all mentions above 10)

Count	What the community would like improved/expanded on
307	Extend Sunday car-free hours (more days, extend hours into the evening)
71	More/better street furniture (seating, tables, better quality and permanent materials)
56	More events, activations, and programming
48	Improve bike infrastructure (protected bike lane, safer, more continuous, better signage)
47	Extend the Pedestrian Zone (make more streets in Gastown car-free)
42	Make it cleaner
40	More pedestrian/car-free areas in Vancouver
30	Increase police/security presence (bylaw/traffic enforcement)
29	Improve street/sidewalk condition/surface (cracks, uneven surfaces, etc.)
27	More landscaping and greenery (better maintain current greenery)
27	Enhance neighbourhood character and showcase history (signage, art, building materials)

What should the City continue to do or **expand on**? How could the City **improve**?  
*(open-ended response)*

23	Support those experiencing homelessness in the area
22	Improve traffic and circulation to the area
20	More shops/restaurant options in the area (food trucks)
19	More vendors on Sundays (market stalls)
17	Increase amount and/or size of patios
17	Improve pedestrian safety (retractable bollards, barriers, traffic calming, lighting)
14	More street performers
12	Increase and improve access to public washroom facilities
10	Let cars move through the space freely again

# Gastown residents

**Majority** of Gastown residents are interested in the car-free Water Street Pedestrian Zone **returning**

Response	All community respondents		All Gastown respondents		Water Street residents		Cordova Street residents	
Yes	77%	<b>84%</b>	77%	<b>82%</b>	75%	<b>86%</b>	77%	<b>83%</b>
Probably yes	7%		6%		11%		6%	
Probably no	3%	<b>12%</b>	3%	<b>13%</b>	6%	<b>6%</b>	5%	<b>14%</b>
No	10%		10%		0%		9%	
Unsure	4%		5%		8%		3%	
# of responses	718		273		36		131	

Are you interested in the car-free Water Street Pedestrian Zone **returning** in future summers?

**Many** Gastown residents had a positive or somewhat positive experience of **two-way Cordova Street**, while Cordova residents were slightly less positive

Response	All community respondents		All Gastown respondents		Water Street residents		Cordova Street residents	
Positive	40%	<b>51%</b>	34%	<b>47%</b>	32%	<b>53%</b>	28%	<b>42%</b>
Somewhat positive	12%		13%		21%		14%	
Somewhat negative	9%	<b>31%</b>	11%	<b>36%</b>	18%	<b>29%</b>	11%	<b>43%</b>
Negative	22%		25%		12%		32%	
Neutral	16%		16%		18%		13%	
Unsure	2%		2%		-		2%	
# of responses	651		236		34		114	

How was your experience on **two-way Cordova Street** this summer?

# Key themes from Gastown residents

Total Survey Results (n=718)		
Rank	Theme	Mentions
<b>Likes</b>		
1	Car-free areas/pedestrian only	330
2	Places to rest/eat	174
3	Livelier, more vibrant/European atmosphere	130
4	Sunday programming	114
5	Safer/more comfortable to walk, roll, ride	101
<b>Dislikes</b>		
1	Cycling infrastructure unsafe/confusing	184
2	Reduced scope of the pilot	157
3	Presence of cars felt unsafe and disruptive	118
4	Vehicle congestion on two-way Cordova Street	95
5	Conflicts between active transportation users and vehicles	65
<b>Improvements</b>		
1	Extend car-free hours	307
2	More/better street furniture	71
3	More events, activations, and programming in Gastown	56
4	Improve bike infrastructure	48
5	Extend the Pedestrian Zone (make more streets in Gastown car-free)	47

Gastown Residents Survey Results (n=273)		
Rank	Theme	Mentions
<b>Likes</b>		
1	Car free areas/pedestrian only	123
2	Places to rest/eat	82
3	Livelier, more vibrant/European atmosphere	48
4	Safer/more comfortable to walk, cycle, use a mobility device	35
5	Two-way Cordova Street	31
<b>Dislikes</b>		
1	Vehicle congestion on two-way Cordova Street	57
2	Reduced scope of the pilot	50
3	Presence of cars felt unsafe and disruptive	34
4	Cycling infrastructure unsafe/confusing	23
5	Discomfort and safety concerns over open drug use	22
<b>Improvements</b>		
1	Extend car-free hours	110
2	More/better street furniture	32
3	Make it cleaner	26
4	More events, activations, and programming in Gastown	25
5	Improve bike infrastructure	25

# Business Survey

## What we heard

# Business Survey Overview

Staff conducted a business survey to collect feedback from Gastown businesses on their **experience** of the 2025 Gastown pilot.

The business survey was live from August 11 to September 7, and was promoted through:

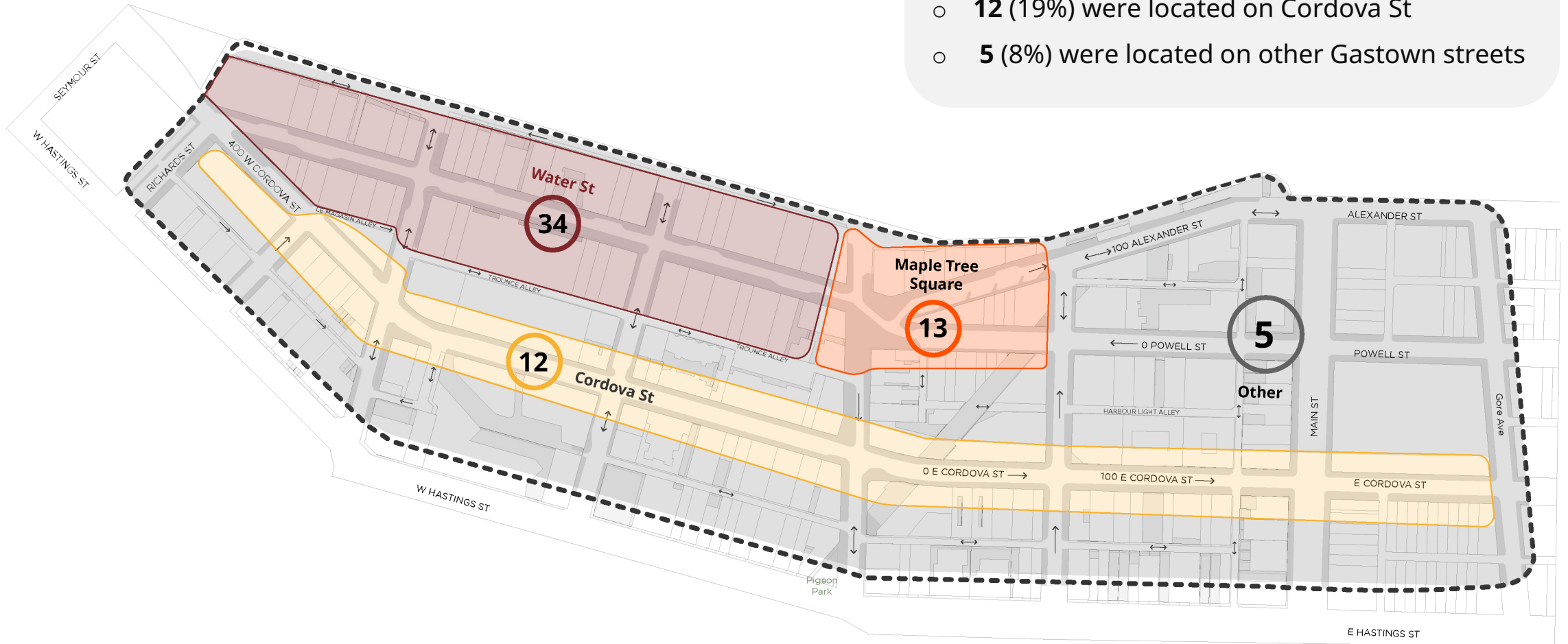
- Community notification letters,
- Targeted emails to businesses,
- Over 50 in-person and virtual interviews,
- Gastown Business Improvement Society (GBIS) and Hastings Crossing BIA.



# Who we heard from

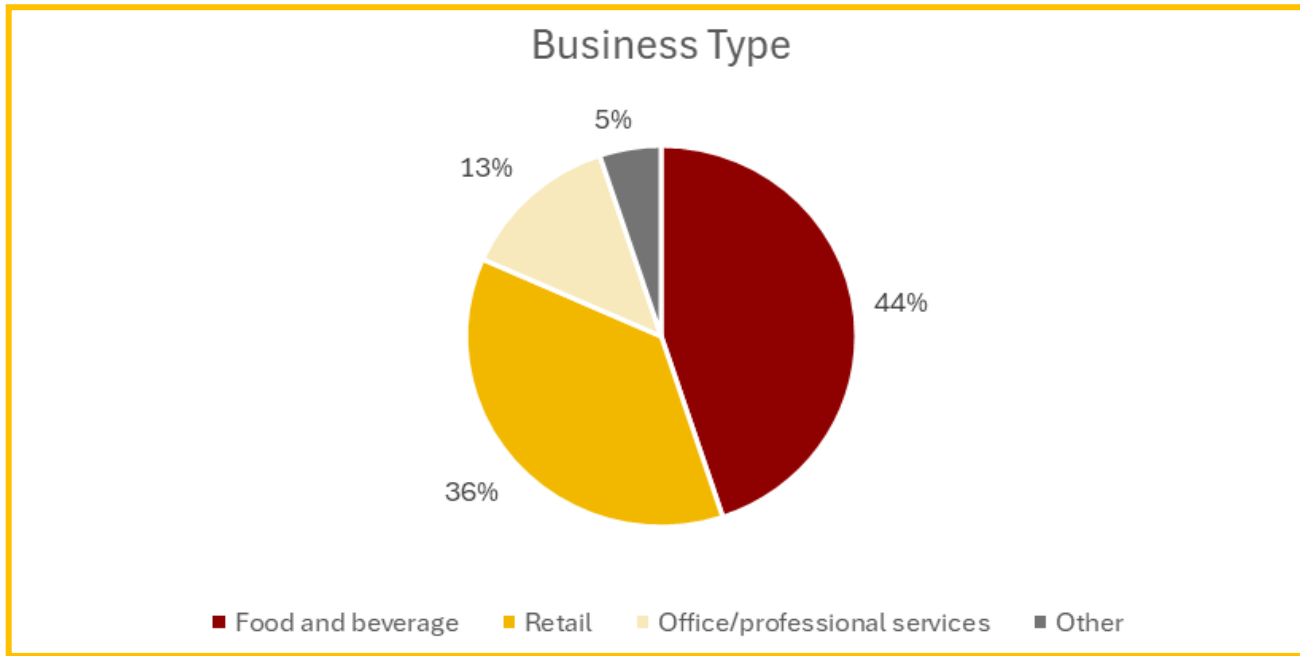
Of the businesses we heard from:

- **34** (53%) were located on Water St
- **13** (20%) were in Maple Tree Square
- **12** (19%) were located on Cordova St
- **5** (8%) were located on other Gastown streets



# Who we heard from

- We heard from **64 business owners or senior managers** within Gastown
  - 70% of surveys completed by business owner or co-owner (including CEO/COO, Founder, Principal, President, Director)
  - 30% of surveys completed by senior management positions (including General Manager, Head of Operations)
- This summer we had **42 total participating Gastown businesses** (up from 23 in 2024)
  - 42% of survey respondents participated in the 2025 pilot (up from 27% in 2024)



# Business experience: **Water Street**

- **Majority** of business respondents had a **positive** experience of Water Street this summer, with a slightly more positive experience **Monday-Saturday than on car-free Sundays**
- **Majority** of businesses reported **no negative impacts to their business operations** this summer (e.g., loading, deliveries, access)
  - 70% of businesses did not experience any negative impact Monday - Saturday
  - 80% of businesses did not experience any negative impact on Sundays

Responses	Monday-Saturday Water		Sunday Car-Free Water	
Positive	63%	<b>77%</b>	61%	<b>72%</b>
Somewhat positive	14%		11%	
Somewhat negative	3%	<b>9%</b>	3%	<b>14%</b>
Negative	6%		11%	
Neutral	14%		14%	
# of responses	64			

How was your **experience on Water Street** this summer **Monday through Saturday** and with the car-free Water Street Pedestrian Zone **Sundays?**

How has the 2025 Gastown pilot impacted your **business operations** (e.g., loading, deliveries, access)?

# Business experience: **business impacts**

- **More** businesses reported a perceived **increase in foot traffic** and **revenue** as a result of the enhancements and changes **this summer** than they reported last summer – particularly on **car-free Sundays**
- On **car-free Sundays**, more **food and beverage businesses** reported an **increase in foot traffic** (81%) and **revenue** (81%) compared to retail businesses (58%, 53%), consistent with last summer

How has the 2025 Gastown pilot impacted your business' **foot traffic and revenue**?

Response	Foot Traffic						Revenue					
	Mon-Sat		Car-free Sun		2024		Mon-Sat		Car-free Sun		2024	
Increased	25%	<b>53%</b>	54%	<b>70%</b>	30%	<b>41%</b>	18%	<b>42%</b>	42%	<b>66%</b>	24%	<b>37%</b>
Somewhat increased	28%		16%		11%		25%		24%		13%	
Somewhat decreased	11%	<b>19%</b>	8%	<b>18%</b>	7%	<b>35%</b>	16%	<b>25%</b>	4%	<b>16%</b>	11%	<b>40%</b>
Decreased	9%		10%		28%		9%		12%		29%	
No change	23%		12%		19%		26%		18%		15%	
Unsure	5%		-		4%		7%		-		8%	
# of responses*	57		50		89		57		50		89	

\* number of responses fluctuate due to non-applicable businesses (non-storefronts or those that are not open on Sundays)

# Business experience: **transportation**

- **Many** businesses were **neutral** about how **cycling was accommodated on Water Street** this summer, with a fairly even **split** between **positive** and **negative** sentiments
- **About half** of businesses had a **positive** experience of **two-way Cordova St**

Response	Cycling		Two-way Cordova St	
Positive	24%	<b>33%</b>	34%	<b>49%</b>
Somewhat positive	9%		14%	
Somewhat negative	14%	<b>28%</b>	9%	<b>24%</b>
Negative	14%		14%	
Neutral	38%		28%	
Unsure	2%		-	
# of responses	64			

How was your business' experience with the way **cycling and micromobility devices** were accommodated on Water Street this summer?

How was your business' experience with **two-way Cordova Street** this summer?

# Business experience: Pedestrian Zone return

- **Majority** of business respondents want the pedestrian zone to return, with an **increase in support** from last summer from **59% to 81%**
- **Food and beverage businesses** were **more likely to want the pedestrian zone to return** (86%) compared to retail businesses (74%) and office/professional services (76%), consistent with last summer

Are you interested in the car-free Water Street Pedestrian Zone **returning** in future summers?

Response	2025		2024	
Yes	70%	<b>81%</b>	49%	<b>59%</b>
Probably yes	11%		10%	
Probably no	6%	<b>14%</b>	7%	<b>35%</b>
No	8%		28%	
Unsure	5%		6%	
# of responses	64		89	

# Business experience: Pedestrian Zone frequency

Many business respondents (39%) want to keep the pedestrian zone **once a week**, while about **half** want to see the pilot **expanded** either every weekend (25%) or summer-long (23%)

Response	Percent	Count
Once a week (e.g., Sunday)	39%	25
Every weekend (e.g., Saturday and Sunday)	25%	16
Summer long (Monday – Sunday)	23%	15
Do not want to see it return	13%	8

How **often** would you like to see the Water Street Pedestrian Zone in future summers?

# Business experience: **promotions**

Business respondents felt the **Gastown Business Improvement Society (GBIS) social media (mygastown)** was the most successful promotional effort

Response	Percent
GBIS social media promotion (mygastown)	50%
Free parking on Sundays	39%
Free bike valet on Sundays	23%
Free 1-zone Translink passes	14%
Discounted Lime e-scooter rides	9%
None of the above	35%

Which of the following **promotional efforts** had a **positive impact** on your business this summer?  
*(select all that apply)*

# Key themes: **likes**

What business respondents **liked** (all mentions above 5)

Count	What businesses liked about the pilot
29	New places to sit/rest (particularly Maple Tree Square seating)
26	Sunday programming
13	Two-way Cordova Street (improved access and circulation)
11	Fewer cars on Water Street
11	Creates a draw to Gastown
10	Livelier, more vibrant/European atmosphere
8	Vehicle access on Water Street
8	Increased number of people in area
7	Increased sense of safety
6	Larger patios
5	Police and security presence



What are some things you **like** about this summer's pilot?  
*(open-ended response)*

# Key themes: dislikes

What business respondents **disliked** (all mentions above 5)


Count	What the community disliked about the pilot
12	Traffic and circulation (confusion/disruption, right-hand turn ban)
12	Cycling infrastructure (unsafe/confusing)
8	Lack of and difficulty parking
7	Discomfort and safety concerns over presence of homelessness
6	Tour buses re-routed to Cordova Street
6	Two-way Cordova Street (loss of parking/loading, congestion)
6	Use of interim pilot materials/design
5	Reduced scope of the pilot (limited car-free hours, limited days)
5	Unscripted programming days



# Key themes: desired improvements and expansions

What business respondents would like to see **improved or expanded** (all mentions above 5)

Count	What the community would like improved/expanded on
19	Extend Sunday car-free hours (more days, extend hours into the evening)
8	More events, activations, and programming
8	Improve marketing/awareness
8	More/better signage
7	Increase police/security presence
7	Cleaning/maintenance of furniture/planters
5	Access to public washrooms



What should the City continue to do or **expand on**? How could the City **improve**?  
*(open-ended response)*

# Patios

This summer, there were **14 new or expanded patios** in Gastown for the pilot.

## Feedback received:

- Easy process for permitting
- Liked the expediting for liquor licenses
- Waived fees were appreciated
- Provided additional seating and increased visibility of their storefront
- Would like to keep patios longer/later in the year
- Upfront costs for beautification are challenging



# Stewardship of bistro sets

This summer, 4 Gastown businesses participated in the **stewardship of bistro tables**.

## Feedback received:

- Businesses appreciated no fees
- Drew people to their business
- People would move the sets around
- Sidewalk sometimes felt too tight with bistro sets
- Quality of furniture was not the best



# Shared market stalls

In the 2025 summer pilot, seven Gastown businesses participated in the shared market stalls, with Make Gastown supporting an additional 12 small businesses to join the program.

## Feedback received:

- Businesses liked that tents were provided
- Liked that it was no cost to business owners
- Businesses felt it livened up the 100 block
- Not enough vendors



# Public Life Study Summary



# Public Life Study Approach

As part of the Public Life Study, Public Life Observations (PLO) and intercept surveys were conducted on Water St in Gastown to understand how the street is used, how it serves the community, and how people interact within it.

- Each dataset offers valuable insight into the people and places that shape the neighbourhood. Together, they reveal more nuanced patterns, such as where and why people choose to stop and linger, and the overall “stickiness” of the space.
- Observations capture what people do and how spaces function, while surveys help uncover behaviour patterns, forming an integrated public life study.

**16 PLO Shifts**  
(15 min minute intervals)

**27,000+ counts** recorded

**32** heat maps recorded



**A total of 828 visitors**  
intercepted on Water St

**9 shifts** conducted  
from 10 am to 8 pm

**16 PLO Shifts**  
(15 min minute intervals)

# Method 1: Public Life Observations

Staff conducted 16 observation shifts to document how people moved through the space and where they chose to linger. **The purpose of this PLO was to better understand the relationship between movement and lingering, providing insights into use patterns and stickiness.**

The study area was divided into five zones, one per block, with observations carried out on weekdays, Saturdays, and Sundays. During each shift, heat maps were created to identify informal gathering areas and track how they shifted over the course of the day. The PLO was conducted across 5 segments to get better granularity and follow the same standards as 2024 pilot observations.

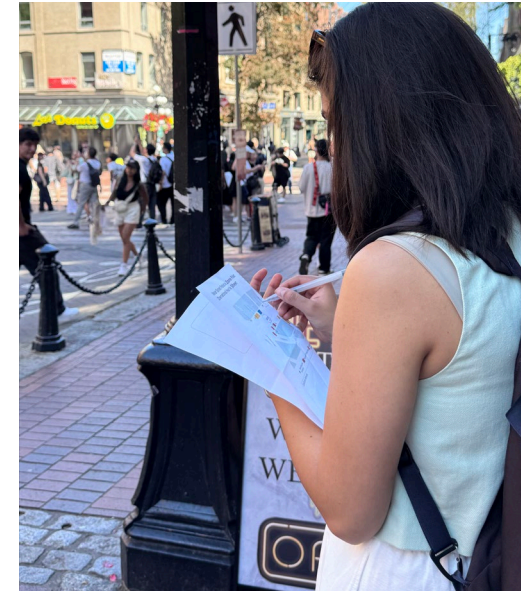
## What was observed

### Counting People Moving

- Perceived age
- Group size
- Perceived gender
- **Mode of transportation:** Walk · Run · Bicycle · Assistive device · Other (scooter, e-bike, stroller, skateboard)

### Counting People Linger

- Perceived age
- Group size
- Perceived gender
- Standing / sitting
- **Activities:** Eating / drinking · Socializing · On phone / resting · Participating in programming · Taking photos



# Public Life Observations Segments



# Method 2: Intercept Survey

The City of Vancouver commissioned Mustel Group to conduct intercept surveys throughout July and August on Water St. **The survey aimed to better understand visitor needs and experiences and to establish a baseline for satisfaction with this year's Pedestrian Zone Pilot.**

**The approach closely followed the 2024 study**, with similar areas covered and minor updates to the questionnaire and adjustments to the sampling plan to reflect this year's scope. The survey questions included demographics, trip purpose, mode of travel and experience metrics.



The survey used a random onsite intercept approach, like 2024, with 828 visitors surveyed across three zones in Gastown:

**Zone A:** Water Street between Richards St and Cambie St

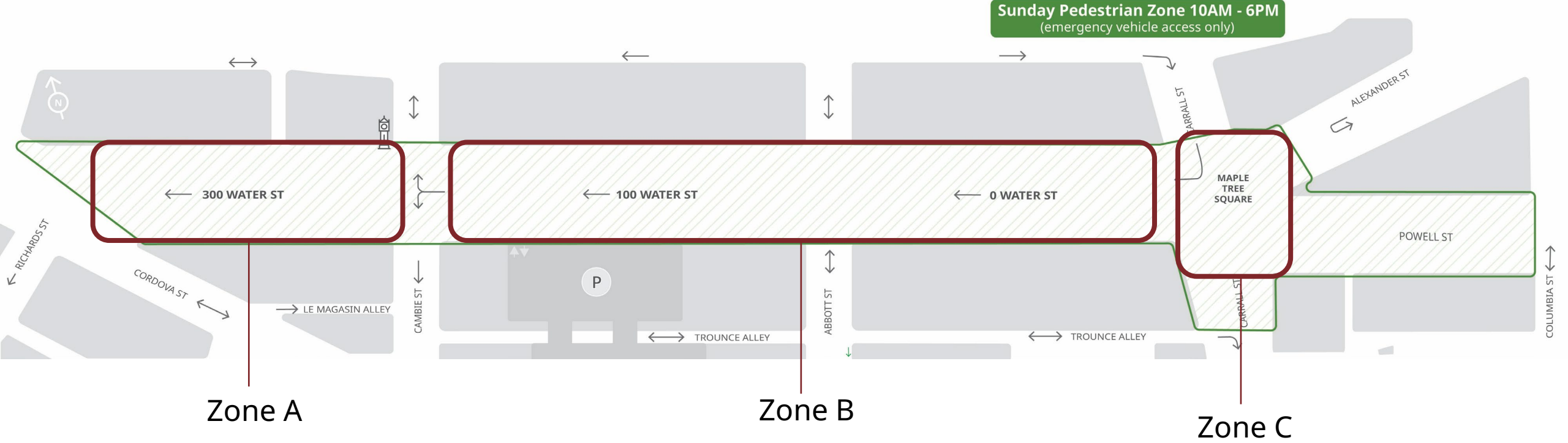
**Zone B:** Water Street between Cambie St and Carrall St

**Zone C:** Maple Tree Square

Data collection took place from July 16 to August 31, 2025, on select weekdays and weekends.

**Interviews were conducted across multiple Sundays with varying levels of programming – low, medium, and high.** The survey completions were balanced across these categories to support meaningful comparisons. Mustel Group conducted tablet-based interviews with randomly selected visitors aged 18+ between 10:00 am and 8:00 pm.

# Intercept Survey Zones



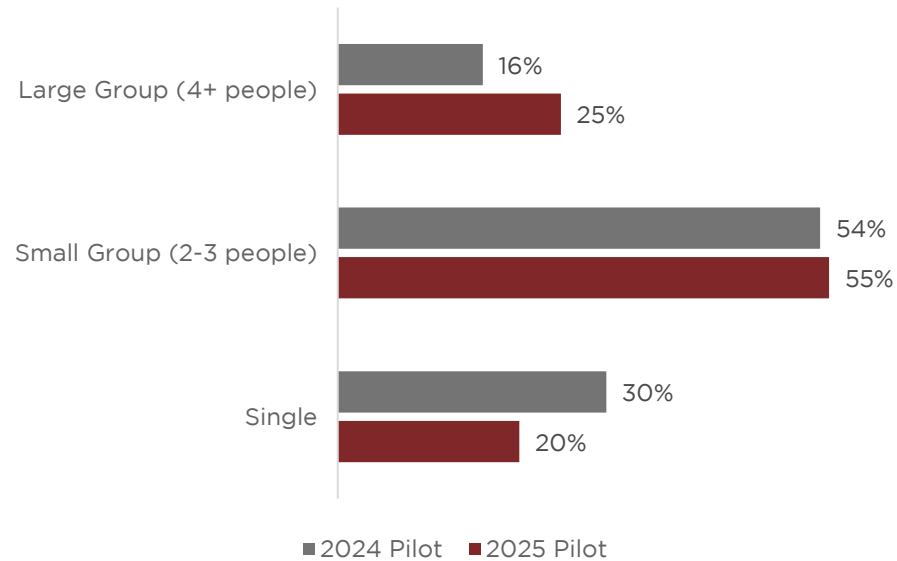
# Water St Experience

## High-level findings

# Who visited Water St?

## What type of visitor group visited Gastown?

Source: Water St Public Life Observations (Summer 2024, Summer 2025)



## Where are visitors from? Source: Intercept Survey (Summer 2025)

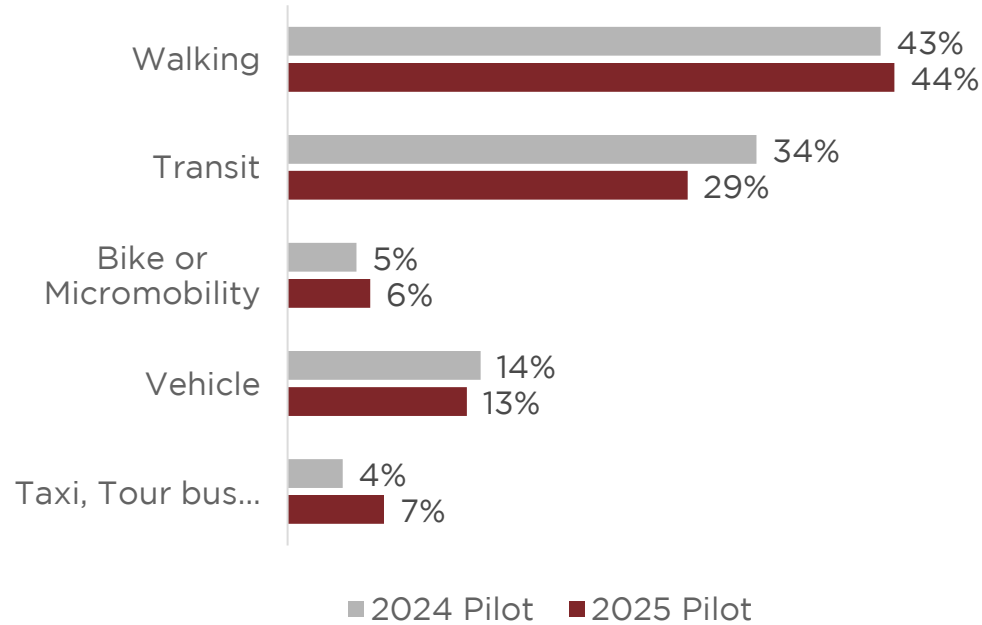
- **Approximately one-third of all visitors to the Water Street Pedestrian Zone in Gastown reside in the City of Vancouver (34%),** most of whom live in Gastown or the Downtown peninsula. A further 16% reside in another municipality within Metro Vancouver and the remaining 50% live in other areas of BC or further afield.

- **No significant differences in space use by gender were observed across years.** Men (49%) and women (47%) engaged in similar proportions across movement and stationary activities, aligning with intercept survey results showing 52% men and 45% women.
- Through the public life observations, **it was observed that most visitors were adults (81%), followed by seniors (10%) and teens (5%).**
- Observations showed that small groups remained the most common, but **there was a notable increase in large groups and a decrease in individuals compared to the 2024 Pilot.** This shift suggests stronger sociability, with more people gathering in groups and feeling comfortable lingering in the space.

# Getting to Water St

## How did visitors get to Gastown?

Source: Intercept Survey, 2024 vs 2025



**79%**  
still visit using  
sustainable modes

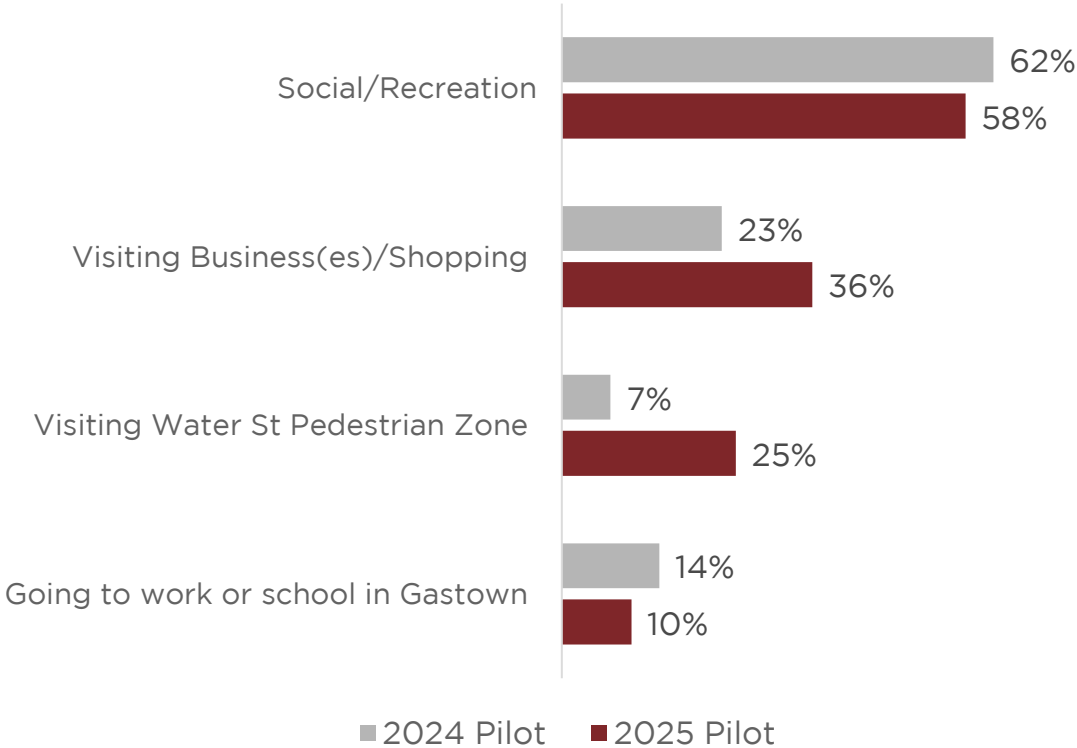
Overall, **walking continues to be the most common mode of travel to Water Street, followed closely by transit**, with no significant changes in patterns since 2024.



# What did visitors do?

## What did visitors do in Gastown?

Source: Intercept Survey, 2024 vs 2025



- **Visiting for social or recreational purposes continues to be the primary reason people come to Gastown** supported by both public life observations and intercept surveys. However, **there has been a noticeable increase from 2024 to 2025 in visitors coming for business or shopping**, as well as those specifically drawn to the Water Street Pedestrian Zone.
- Additionally, through the PLO, it was observed **that people engaged in a wide range of activities, with socializing (26%) being the most common, followed by using a phone or laptop or resting (23%),** taking photos (16%), and participating in programming (12%).
- This suggests people who visit Water St feel comfortable in lingering and spending time in the area.

Source: Water St Public Life Observations (Summer 2025); Intercept Survey (Summer 2025); Intercept Survey (Summer 2024)

# Which block drew more visitors?

In Public Life Observations, busyness represents the overall level of activity in a space, measured by the number of people present at a given time, including both those lingering and passing through. It offers a snapshot of how active and well-used a place is, highlighting its role in the everyday rhythms of the neighbourhood. The graph compares the average total visitor counts on weekdays and weekends between the 2024 and 2025 pilot periods.

## Weekdays

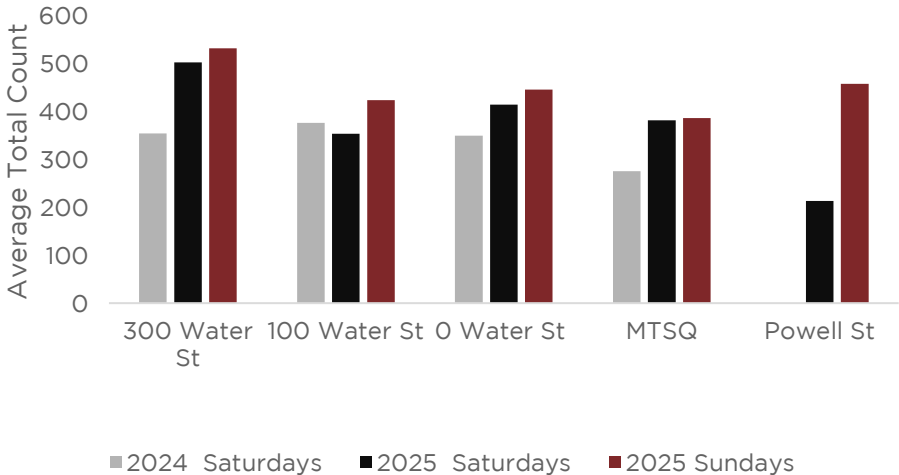
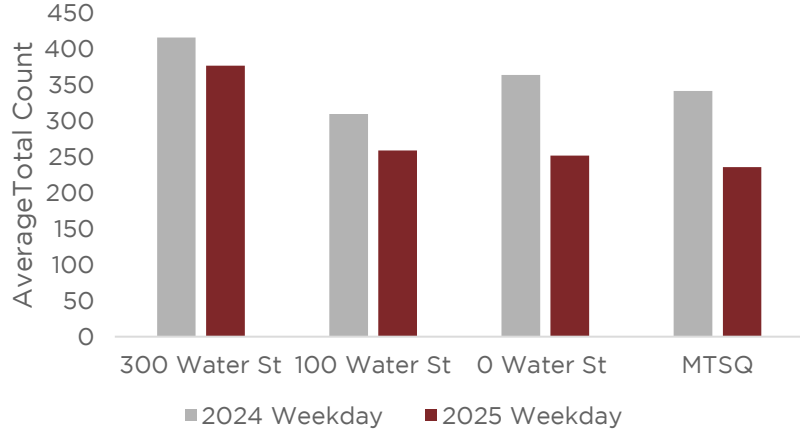
**In 2025, Water St and MTSQ were not closed to vehicles on weekdays, which may have contributed to lower weekday counts across blocks compared to 2024.** In 2024, the 300 block and MTSQ were car-free all week, possibly creating more weekday pedestrian activity.

## Weekends

In contrast, **increased programming and full pedestrianization on Sundays in 2025 led to higher weekend counts.** Sunday busyness was also more evenly distributed across blocks, with people spreading out beyond key destinations rather than concentrating in a few locations, resulting in busyness being shared more broadly along the corridor.

## Which block drew more visitors on Water St?

Source: Water St Public Life Observations (Summer 2024 vs Summer 2025)



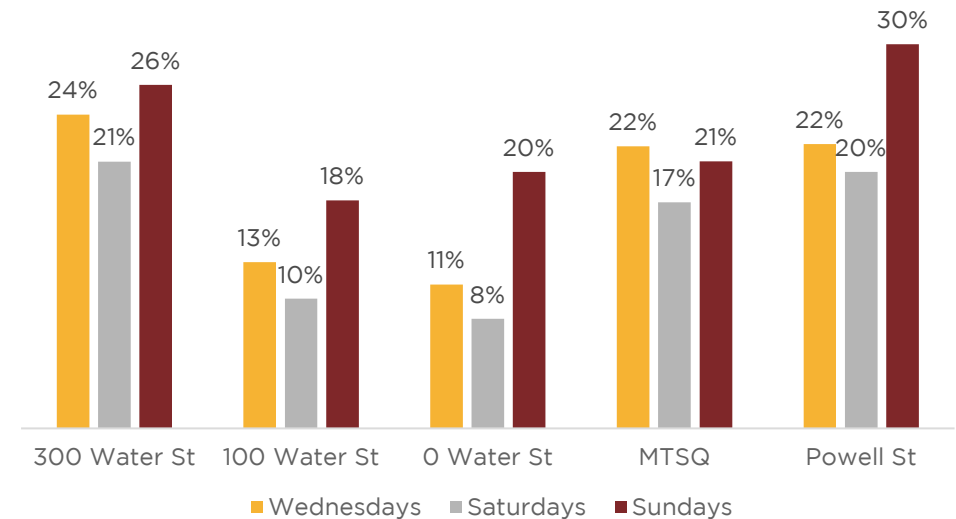
# How likely were visitors to linger?

In public life observations, **stickiness** refers to how well a space encourages people to stay, engage, or return, indicating its ability to support vibrant and lasting social activity. Stickiness was measured on both Saturdays and Sundays as well as a Wednesday, to represent weekday behavior.

- **300 Water St and Maple Tree Square (MTSQ) consistently display the highest levels of stickiness**, suggesting that these blocks naturally attract people to linger, driven by draws like the Stream Clock, even outside of the Pedestrian Zone days.
- **Higher levels of stickiness were observed on Sundays**, likely due to Pedestrian Zone Sundays, which may have encouraged people to spend more time in the space compared to Saturdays. 100 Water St, 0 Water St and Powell St, which usually don't have natural draws, had higher stickiness on Sundays.

## How likely were visitors to engage with Water St?

Source: Water St Public Life Observations (Summer 2025)



$$\text{Stickiness} = (\text{Number of lingering users} \div \text{Total number of users}) \times 100$$

# Programming Levels

To understand how the pedestrian zone responded to different baseline levels of activation, a range of programming was delivered throughout the summer pilot. **Each theme was assigned a programming intensity, corresponding to the complexity and resources required for the activations:**

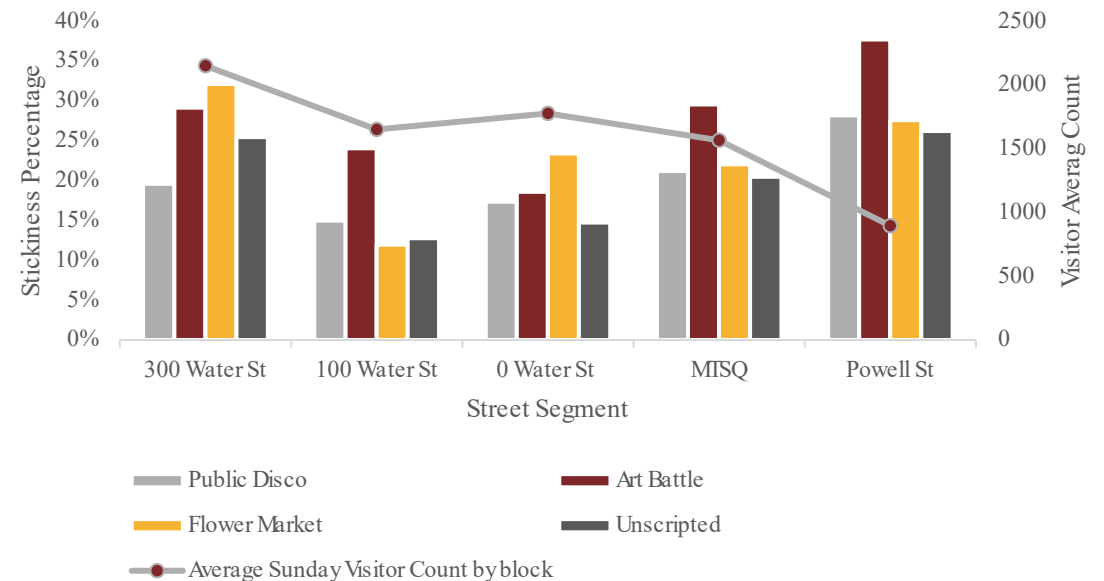
- Public Disco at the highest level,
- Art Battle and the Flower Market at a medium level, and
- Unscripted Days, with no formal programming.

Each **programming theme activated different zones of the pedestrian area, while some were intentionally distributed throughout.** For example, the Flower Market was concentrated at 000-block of Water St, which helps explain the higher stickiness observed there. In contrast, Public Disco and Art Battle were spread along the street, creating activity across multiple blocks.

The bar chart (left axis) illustrates the overall stickiness associated with each programming theme by segment, while the line graph (right axis) shows the total average number of visitors recorded at each segment.

## Which Sunday Pedestrian program attracted the highest levels of lingering activity?

Source: Water St Public Life Observations (Summer 2025)

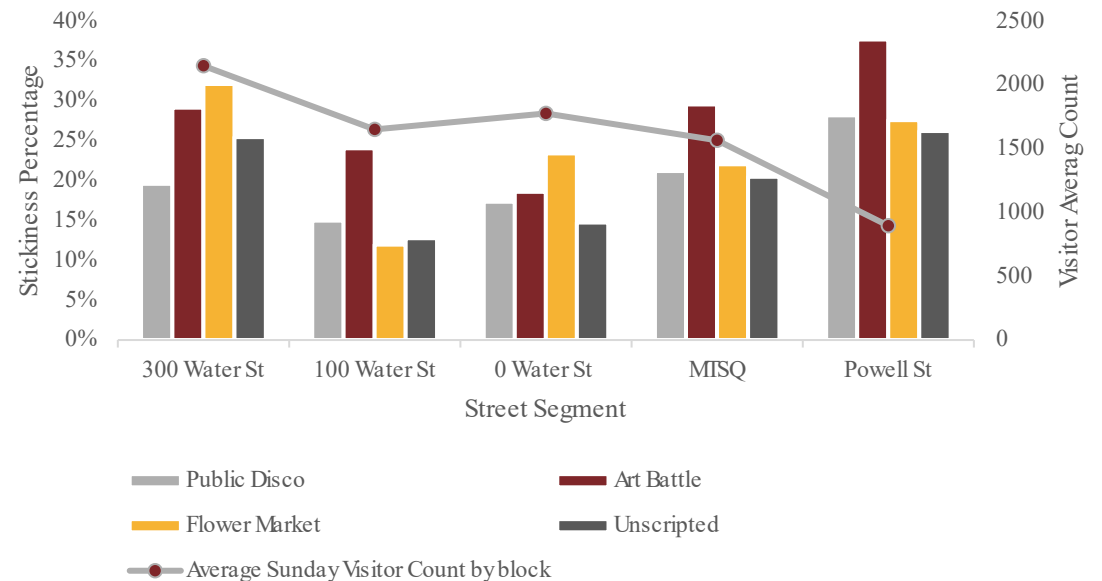


# Programming Levels

- Although Public Disco was considered a high programming day, **Art Battle and Flower Market had higher stickiness.**
- The Flower Market at 000 Water St and Art Battle at 100 Water St also demonstrated strong stickiness compared to other locations, indicating that **certain programming themes can successfully increase activity even in areas without major natural draws like the Steam Clock.**
- Powell St similarly showed high stickiness, supported by programming as well as **retail anchors such as Stüssy that encouraged people to linger** as seen in our heat map collection.

## Which Sunday Pedestrian program attracted the highest levels of lingering activity?

Source: Water St Public Life Observations (Summer 2025)



# Visitor Experience

Source: Intercept Survey, 2024 vs 2025

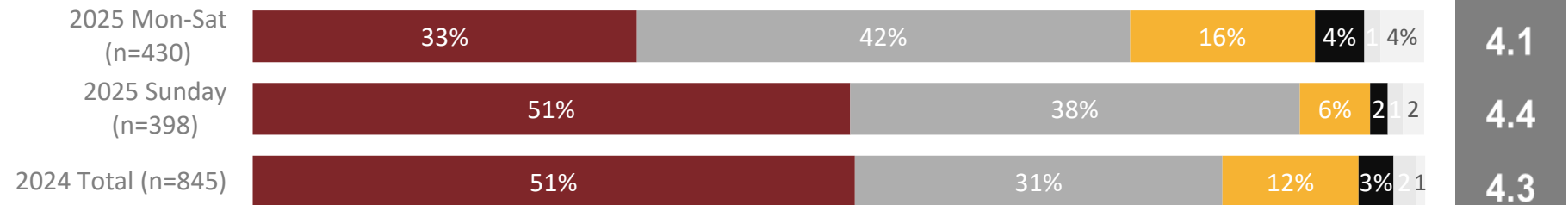
**Water St is a vibrant and lively street.\***



**Water St is a comfortable outdoor place for me to spend time and socialize.\***



**The public space enhancements on Water St (e.g. seating, planters, art displays) /the Sunday Water St pedestrian zone creates a destination that draws me to visit Gastown more\***



■ 5 Strongly agree ■ 4 Agree ■ 3 Neutral ■ 2 Disagree ■ 1 Strongly disagree ■ Unsure

# Visitor Experience

## Sociability

High-quality public spaces can help create and encourage social connections, which in turn can have positive impacts on an individual's overall health and wellbeing.

A space's sociability ratings reflect how welcoming and engaging a space feels and how likely visitors are to connect, linger, and share experiences. Sociability is not defined by a single measure but by a combination of indicators that reveal how socially vibrant and comfortable a place feels.

- Overall, **Sundays fostered stronger sociability, supported by the car-free zone, art programming, and additional seating, all of which encouraged people to stay longer and interact with others.** PLO showed a 9% increase in large groups compared to 2024, and socializing remained the most common activity observed in this year's pilot.
- Intercept survey results reinforce these findings, showing **consistently strong perceptions of sociability on Sundays.** The statement "Water Street is a vibrant and lively street" received slightly higher ratings on Sundays (mean = 4.3) than on weekdays (mean = 4.2), suggesting that pedestrian Sundays enhance the street's social energy. Compared to 2024 (mean = 4.3), **these perceptions have remained steady, indicating sustained vibrancy even as programming has evolved.**



# Visitor Experience

Source: Intercept Survey, 2024 vs 2025

**Water St is appealing for me to shop and dine.\***



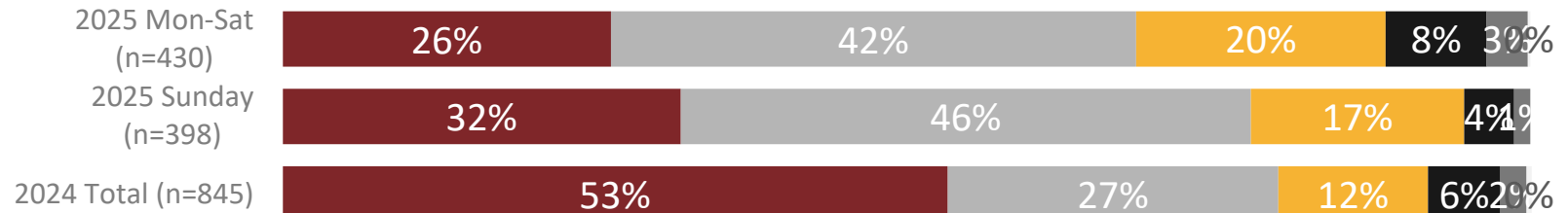
**Mean**

4.0

4.1

4.3

**Water St feels safe and comfortable for me to walk or roll.\***

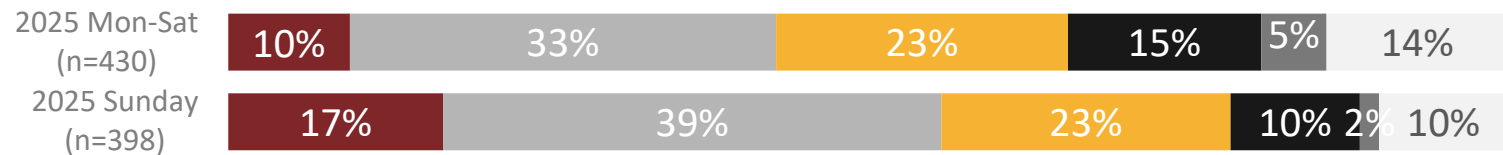


3.8

4.0

4.2

**Water St feels safe and comfortable for me to cycle or use a micromobility device.\*\***



3.3

3.7

■ 5 Strongly agree ■ 4 Agree ■ 3 Neutral ■ 2 Disagree ■ 1 Strongly disagree ■ Unsure

# Visitor Experience

## Safety & Comfort

In public life observations, safety and comfort are assessed by observing whether people of different ages and abilities choose to stay, linger, and interact in a space, and whether the environment supports ease of movement, visibility, and personal comfort.

Public space design can impact how safe and comfortable people feel in a place, and therefore their likelihood of returning to a space.

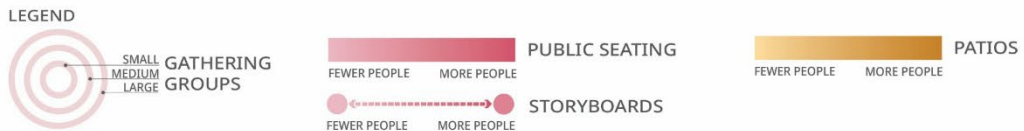
- The intercept survey statement “Water Street is a comfortable outdoor place for me to spend time and socialize” speaks directly to this dimension. Ratings improved slightly on Sundays (mean = 4.2 vs. 4.1 on weekdays), **suggesting that the pedestrian environment with less traffic, more seating, and calmer conditions enhances people’s sense of comfort.** Compared to 2024 (mean = 4.4), comfort remains high, indicating stable satisfaction with the pedestrian experience.
- **PLO also support this, with socializing (26%) and using a phone or laptop or resting (23%) emerging as the top activities,** reflecting a space where people feel safe and relaxed enough to linger.



# Sunday Pedestrian Zone Experience

# Public Life Activity

This map illustrates where people gathered, sat, and used patios along Water St throughout the Sunday Pedestrian Zone Days. **Larger pink circles highlight areas with frequent and larger group gatherings, while darker red and yellow blocks show the most heavily used public seating and patios, respectively.**



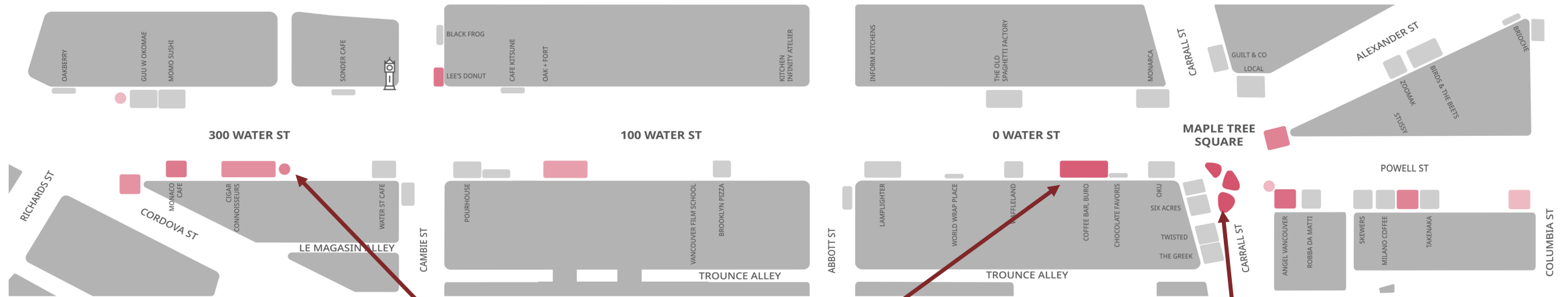
## High-level Findings:

- Seating was identified as a key element and was consistently well used on both Sunday pedestrian zone days and non-pedestrian days.
- Patios added vibrancy to the street, with several remaining fully occupied throughout the observation period.
- Programming played an important role in encouraging people to linger and in creating a continuous, active street experience.



# Public Life Activity | Public Seating

Public seating, designed for a variety of uses, was **consistently well used and positively received during the pilot**, highlighting the value of prioritizing comfortable, accessible seating in public spaces. In some locations, demand exceeded the amount of seating provided, suggesting opportunities to expand seating in future iterations.



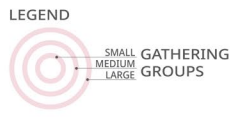
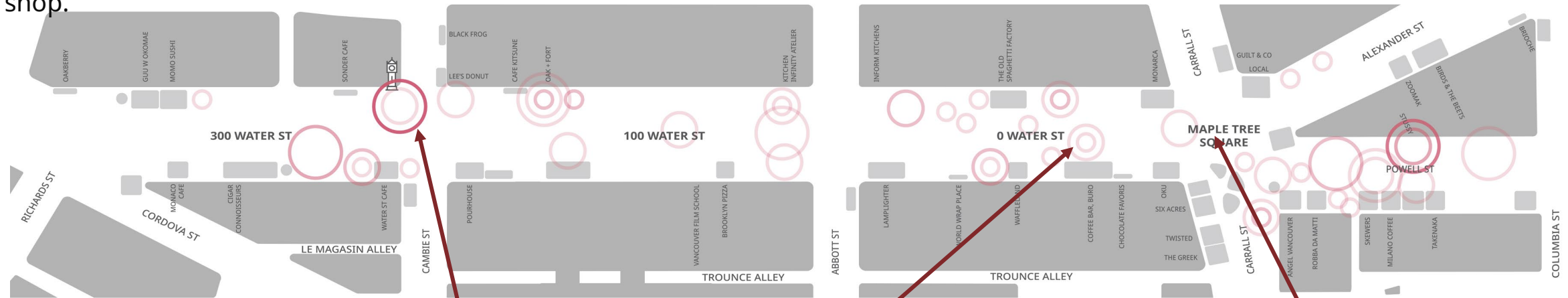
**LEGEND**

PUBLIC SEATING  
 FEWER PEOPLE    MORE PEOPLE  
 STORYBOARDS  
 FEWER PEOPLE    MORE PEOPLE



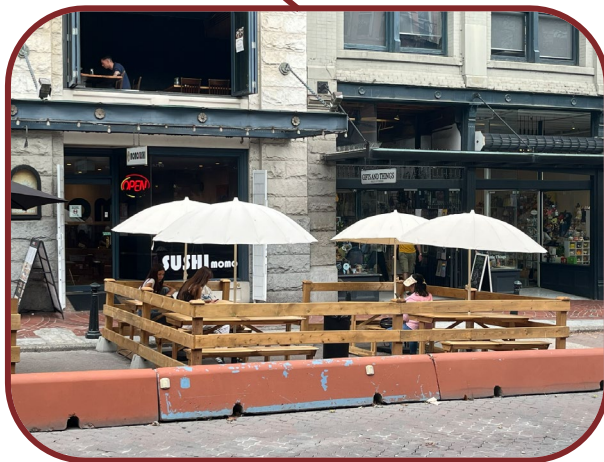
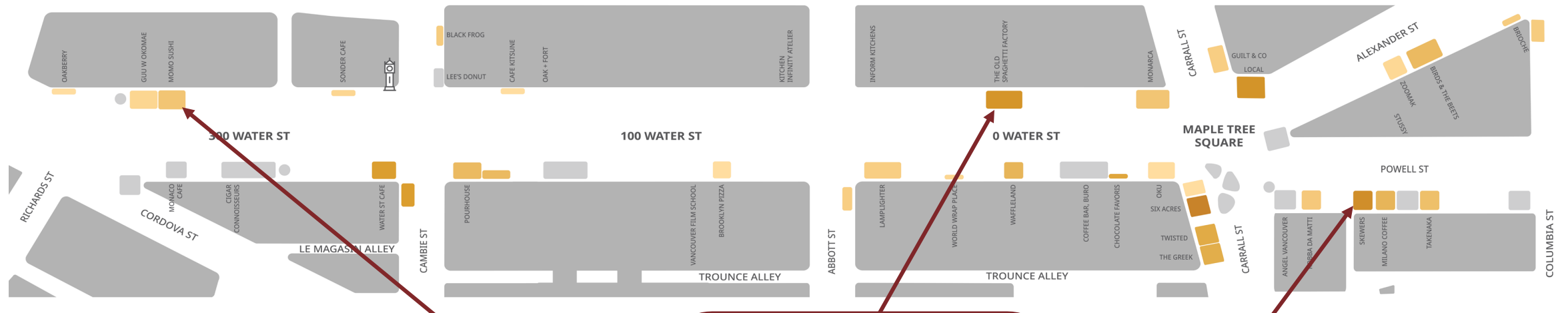
# Public Life Activity | Informal Gatherings

This map highlights where people naturally gather and interact, with **Maple Tree Square and the Steam Clock** were key **hotspots for gathering**. Busking, programmed activities, and casual hangouts contribute to the vibrancy of these areas. Nearby storefronts, such as Stüssy on Powell Street, also fostered informal gathering, drawing people to linger and socialize outside the shop.



# Public Life Activity | Patios

Patios, including the ones extended for the summer pilot, added vibrancy to Water St. Those with spacious and welcoming layouts performed particularly well and were consistently full.



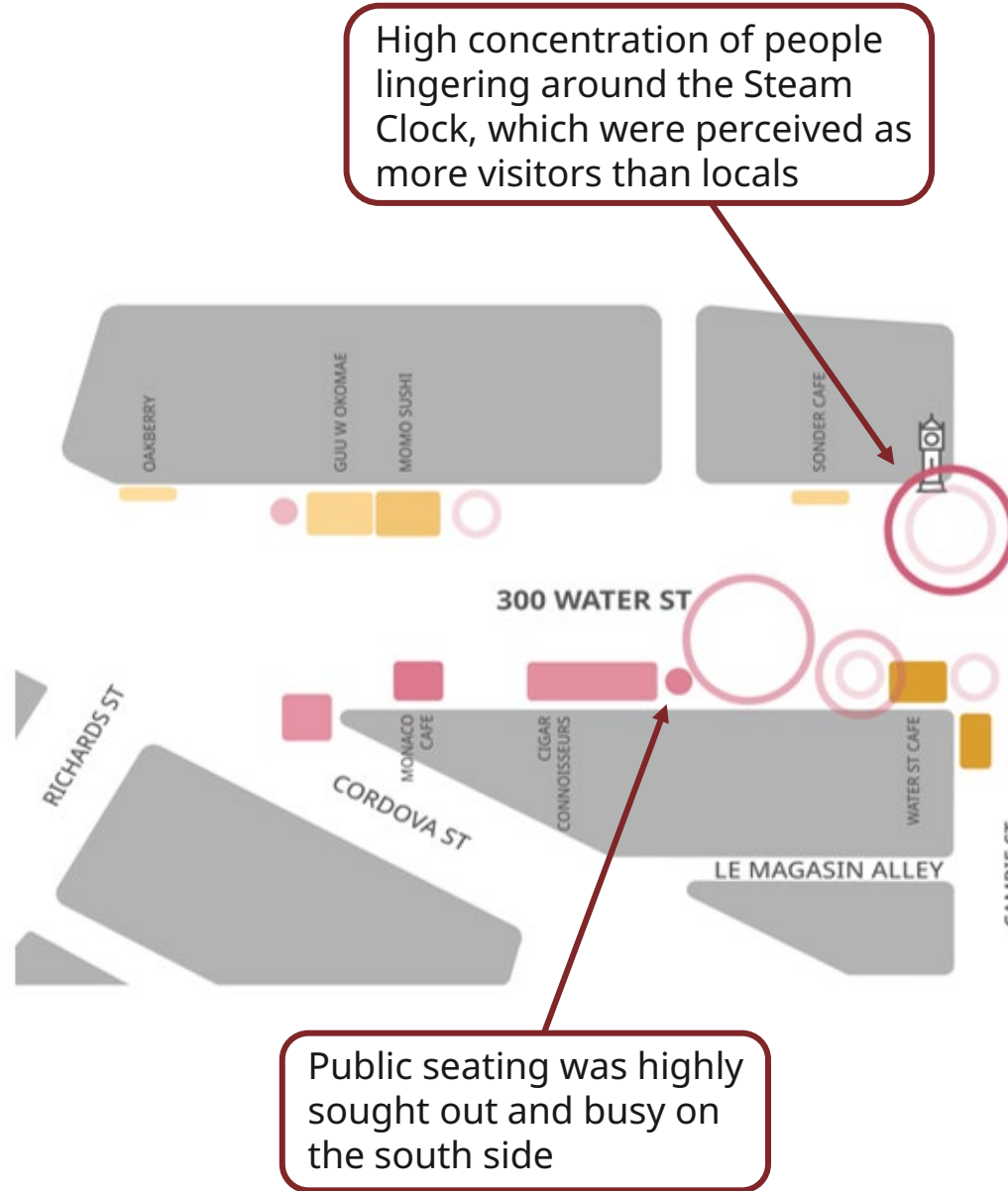
# Sunday Pedestrian Zone Experience

## Block by block

# 300 Water St

This block is the westernmost block of Water St and acts as one of the **key entry points to Gastown due to its proximity to Waterfront Station**. The 300-block is consistently a busy block due to the Steam Clock, which attracts tourists and visitors year-round. During the 2024 pilot, the 300-block was one of two car-free zones, making it a key hub for gathering.

In the 2025 pilot, **the area was enhanced with additional placemaking features and seating at the intersection of Water St and Cordova St, to represent the western gateway to the neighbourhood**. However, Observations showed that, aside from Steam Clock visitors, the 300-block attracted less lingering and social activity on Sundays compared to 2024 and to other areas within the Pedestrian Zone, likely due to reduced public seating compared to last year.

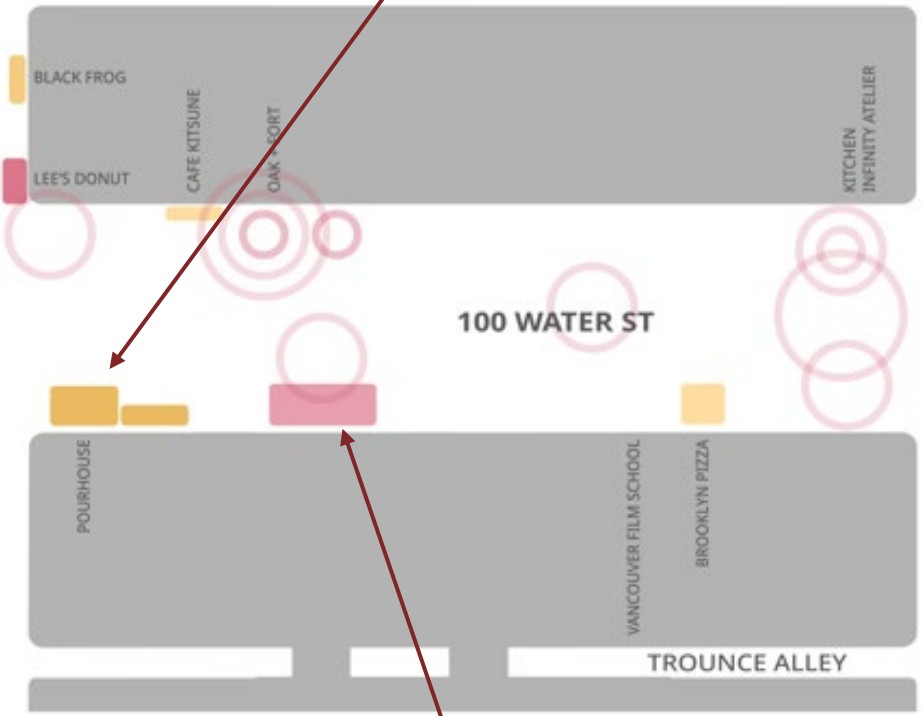


# 100 Water St

The 100-block has typically been less attractive for lingering due to ongoing construction, limited active storefronts, and the presence of tour buses, which can interrupt the pedestrian experience and discourage social gatherings. During the 2024 pilot, vehicle access was retained on this block, which limited its appeal for pedestrians due to the frequent presence of large tour buses parked along the block. **Visual continuity beyond the Steam Clock was therefore identified as essential** to encourage visitors to explore, linger, and engage beyond this key destination.

**In the 2025 pilot, this block was fully closed to vehicles on Sundays and was enhanced with placemaking features, improving comfort and visual interest.** These changes helped mitigate longstanding challenges and demonstrated the block's potential to better support pedestrian activity and connection along Water Street.

Concrete barriers were used as informal seating, suggesting a need for more seating on this block



Placemaking features like the market stalls and mini golf encouraged lingering

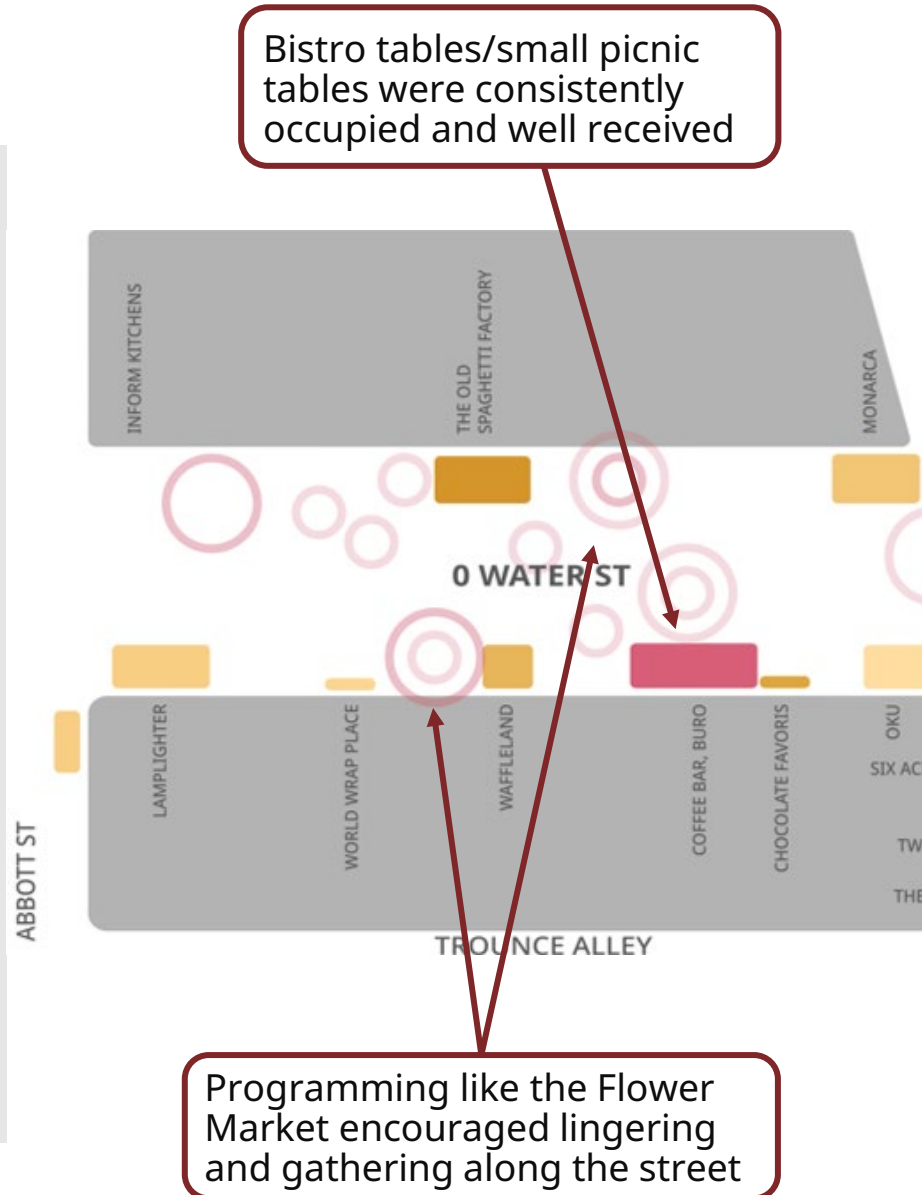


# 0 Water St

Compared to other sections of Water Street, this block benefits from a higher concentration of active storefronts and restaurants, which help animate the street throughout the day. Its proximity to Maple Tree Square further strengthens its role as a place gather, with people naturally flowing between the two spaces. **This block also offers generous public space and shade, creating a naturally welcoming environment.**

During the 2024 pilot, the block was car-light, with limited local access only, making it pleasant to move through but less supportive of longer stays.

In the 2025 pilot, targeted programming encouraged informal gatherings on this block, and the additional public seating was consistently well-used, reinforcing the block's potential as a comfortable and active place to linger.

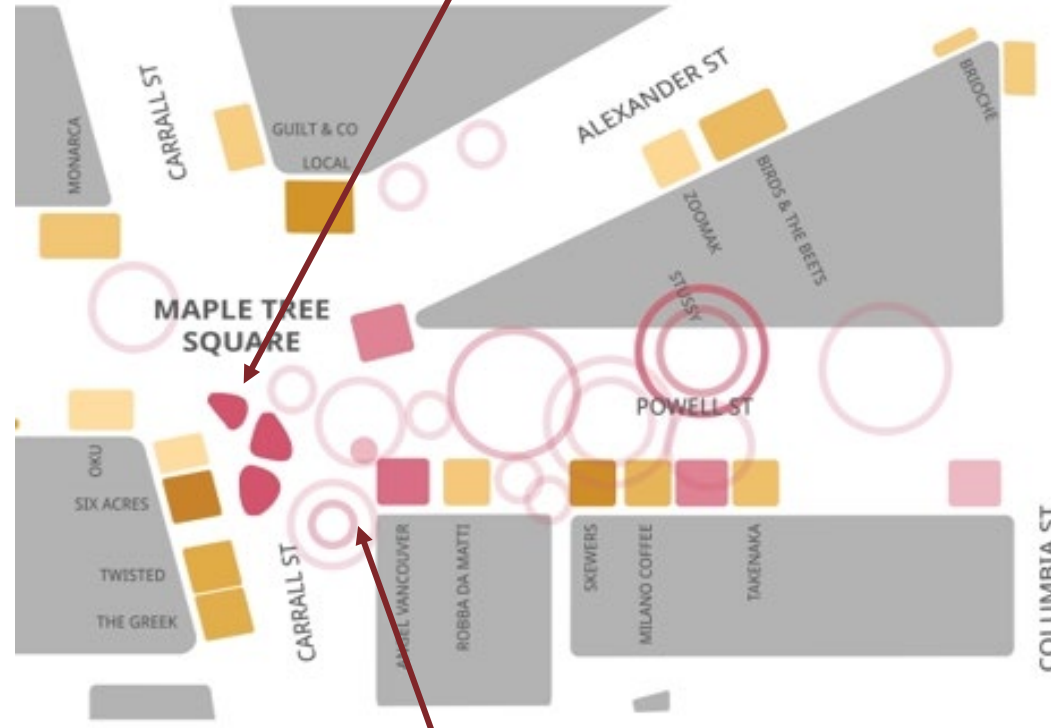


# Maple Tree Square

Maple Tree Square (MTSQ) remains a key gathering space within the pedestrian zone, serving as a central social and cultural anchor for Gastown. **As a historic meeting place and a site of significance for local First Nations, the square holds deep cultural meaning while continuing to function as an everyday place for connection, observation, and informal gathering.** Its openness, visibility, and surrounding active uses naturally draw people to pause and spend time.

During the 2025 pilot, **the addition of new planter-edge seating pods in front of Six Acres created expanded opportunities for people to engage with the space, supporting lingering, social interaction, and reflection.** These additions strengthened MTSQ's role as both a contemporary public space and an important cultural landmark along Water St.

New seating area in MTSQ was well received and consistently well-used



MTSQ identified as a desirable hub for programming by organizers



# Powell St

Powell St was a new addition to the 2025 pilot, having not been part of the pedestrian zone in the 2024 design. It offers a **strong setting for programming, with mature trees that provide ample shade and wide street lanes that allow for flexible use and larger-scale activities.**

Historically, this stretch has been harder to draw people, with pedestrian activity tapering beyond MTSQ. To address this, **an eastern gateway was introduced using the Gastown sign, helping to visually signal continuity** and invite people to continue past Maple Tree Square further down the street.

Storefronts like Stussy regularly drew lineups, bringing steady lingering to this block



Powell St required extra programming and seating to ensure block was activated

Gastown sign had low usage throughout the Pilot



# Economic Impact Assessment

5





# Economic Impact Assessment of the Potential Pedestrianization of Gastown in Vancouver, BC

NOVEMBER 2025

Prepared for the City of Vancouver  
By Jon Stover & Associates





## TABLE OF CONTENTS

- 4** Study Purpose and Context
- 5** Executive Summary
- 7** Economic Trend Analysis
- 14** Historical Precedent & Case Study Findings
- 15** Pedestrianization Implications & Projections
- 16** Preliminary Recommendations



## PURPOSE OF THIS REPORT

This report examines Gastown's economic trends in relation to broader downtown and national patterns. It summarizes findings for the anticipated impact of the 2024–2025 two-year pilot testing public space and transportation changes on local businesses and identifies opportunities to support all area businesses moving forward.



# Study Context

## Study Scope and 2025 Update

JS&A assessed a range of available economic and demographic data to understand how visitor traffic and sales revenue for local retailers have been impacted during construction in 2024 and pedestrian pilot events in summer 2024. In addition, a case study analysis was conducted to understand the range of anticipated longer-term impacts if a pedestrian-first design for Water Street is implemented on a temporary or permanent basis. Finally, JS&A developed top-level recommendations for the City of Vancouver and local partners to assist business and property owners to ensure that as many businesses as possible benefit from potential infrastructure improvements.

**The study was updated in November 2025 to include impact findings from construction activity and pedestrian pilot events over the course of 2025. As such, this report includes portions that are somewhat repetitive, summarizing economic impact findings in 2024 followed by separate findings for 2025.**

## Project Context

Gastown is an important heritage district and popular destination in Vancouver. Some of the key streets and public space assets are in need of rehabilitation, particularly along Water Street and Maple Tree Square.

Following the 2023 Council motion, “A People-Focused Gastown: A Bold, Forward-Looking Vision for a Vibrant & Prosperous Neighbourhood,” the City of Vancouver initiated a

planning and design process to develop a Gastown Public Spaces Plan. The plan will assess a path forward to a pedestrian focused Water Street that allow for periodic Pedestrian Zones and provide guidance on how to enhance Gastown’s network of streets and spaces.

## Project Partners

This analysis is part of the Gastown Public Spaces Plan, commissioned and overseen by the **City of Vancouver** and undertaken by an interdisciplinary team, led by **Hapa Collaborative**, including designers, planners, heritage consultants and advisors, engineers, and other experts with extensive collective experience leading complex, collaborative public realm planning and design processes in a multi-stakeholder setting.

## Jon Stover & Associates

The analysis and report was produced by Jon Stover & Associates (JS&A), an Economic Development Consulting firm that specializes in economic analysis and economic development strategy. JS&A bridges the gap between the different worlds of policy, business, real estate, and community interest to help make resilient neighborhoods in which to live, work, and play.

## Land Acknowledgement

JS&A acknowledges that the project location is in the City of Vancouver, which is situated on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam), Sḵwx̱wú7mesh (Squamish), and səliłwətał (Tsleil-Waututh) Nations.



# Executive Summary: 2024

PAGE 1 OF 2: JS&A STATEMENT OF OPINION

**Gastown is a world-famous dining and shopping destination with many of the characteristics that make it a good fit for an improved pedestrian experience: a strong cultural heritage that draws visitors and locals alike; a nightlife, entertainment, and tourism-orientation; a central and accessible location; and a pedestrian scale and business mix that generate street-level vibrancy.**

On the other hand, Gastown, along with much of the broader Downtown Vancouver area, is experiencing a range of challenges pertaining to commercial vacancy, business vitality, visitation levels, and public perception. Infrastructure construction took place in March, April, May, and June of 2024 and likely had a negative impact on local businesses. However, business revenue trends during this time period were similar to the proceeding months as well as that of other commercial nodes across Vancouver. The pilot activities in July and August 2024, including a two-month pedestrianization of two blocks of Water Street, seem to have had a positive impact on sales for most business types.

Based on existing economic and visitation data and historical precedent and norms of other comparable pedestrian-first public realm improvements across Canada and the United States, it is expected that a well-executed pedestrian-first public realm improvement and corresponding marketing and place-management efforts would lead to an increase in visitation and sales activity in Gastown upon completion. Importantly, this process can elevate the identity of Gastown and create a truly unique entertainment node that serves visitors and locals alike. While not all businesses will benefit, there are measures that can be implemented to support or retain local businesses and to preserve key aspects of Gastown's business mix, aesthetics, and identity.



# Executive Summary: 2024

## PAGE 2 OF 2: KEY FINDINGS

### National and Downtown Retail Trends

By the end of 2024, Downtown Vancouver had not fully recovered from the pandemic. Sales and visitation in other commercial nodes near downtown were also below pre-pandemic levels. As such, it is difficult to distinguish between construction/pilot impacts and macro trends. Findings in Gastown reflect broader national trends in Canada, as many retail categories have experienced stagnant or declining sales in 2024.

### Gastown Retail Trends

Throughout the year, retail sales in Gastown remained below 2023 levels. A somewhat similar drop was seen across the downtown area and mirrored customer traffic declines experienced on W. Hastings, Robson Street, Granville Street, and Alberni Street for much of 2024. According to Moneris point of sale data, there was not a noticeable further decline in sales during construction in May through June 2024. But there was a noticeable uptick during the pilot activations in July and August 2024.

### Business and Visitor Sentiment

Nearly 60% of businesses surveyed in 2024 were interested in the Pedestrian Zone returning in future summers, and support continues to grow. Many of North America's most successful pedestrianization efforts had lower levels of business owner support during planning and construction.

### Pedestrianization Implications and Projections

A pedestrian-first design for Water Street has the potential to elevate its brand identity and increase customer traffic. While overall sales will likely increase, not all businesses will benefit. Pedestrianization can benefit visitors, residents, and workers alike.

### Emerging Recommendations

Pedestrianization efforts should be flexible, allowing the City to adapt to potential unforeseen outcomes. The City should continue to work closely with the Gastown BIA, local businesses, and other partners to develop a successful pedestrian street program that provides enhanced support pertaining to marketing, safety, cleanliness, events, and leasing assistance. While all customer bases can be supported through pedestrian-first public realm improvements, the customer base with the potential to provide the largest increase in numbers is likely to be destination visitors from across the Vancouver metropolitan area. Marketing should prioritize residents from throughout the region, as well as nearby residents, out-of-town tourists, local workers, and others. Tools exist to help support and retain key businesses that are important to the identity or history of the neighborhood.



# Executive Summary: 2025 Addendum

PAGE 1 OF 1: KEY FINDINGS

## 2025 Gastown Pedestrian Zone Updates

This is the second year of piloting public realm improvements in the Gastown neighbourhood as a means to inform the Gastown Public Spaces Plan and future investment in the neighbourhood. Building on the first Pedestrian Zone Pilot on Water St in 2024, the 2025 Pilot approach included: the implementation of a two-way design for Cordova St (formerly a one-way eastbound street), public space enhancements and placemaking features along on Water St, and Pedestrian Zone Sundays from 10am to 6pm every Sunday from June 15 to August 31, 2025.

## National and Downtown Retail Trends

Canada and Downtown Vancouver are still dealing with economic challenges. Rising prices, concerns around US tariffs, higher borrowing costs, and more cautious household spending remain prominent, making it difficult to distinguish the effects of broader macroeconomic conditions from localized impacts in retail corridors such as Gastown.

## Gastown Retail Trends

In 2025, sales performance was mixed. Gastown outperformed Downtown during March–May (+8.0% vs. –0.4%) but recorded lower sales growth during the pilot months of June–August (–1.6% vs. +3.8%). Year-to-date through August, Gastown sales are up 2.3% compared with 2024, though results for July (+2% vs. Downtown

+4%) and August (–1% vs. Downtown +6%) show weaker pilot-period performance than Downtown.

## Business and Visitor Sentiment

Survey findings conducted by the City of Vancouver show that business support for the pedestrian zone grew in 2025, with 72% of surveyed businesses in favor of its return (up from ~60% in 2024). Visitor surveys reported higher satisfaction and spending on Sundays, with average reported spend of \$98 compared with \$84 in 2024. Survey results generally support the conclusion that the pilots are well received as public space activations, but their measurable economic impacts remain limited and difficult to isolate.

## Preliminary Emerging Recommendations

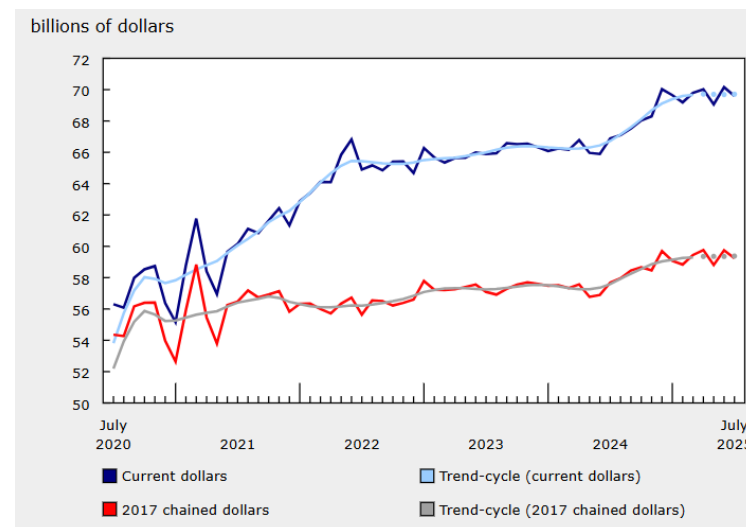
The pilot continues to be well received as a public space activation, but measurable economic impacts remain limited and difficult to separate from broader trends. Downtown has outperformed Gastown over the last year, including during the pilot period, suggesting Gastown may be losing some of its competitive advantage. Visitor origin patterns for Canadian visitors have not shifted significantly since 2024, highlighting a missed opportunity to attract more residents from across the region. Future efforts should focus on strengthening Gastown's draw as a regional destination and improving its image through programming, marketing, and design interventions.

# National Economic Trends

Retail sales rebounded after the pandemic but have since remained stagnant. E-commerce continues to capture an increasing level of sales previously spent at brick-and-mortar establishments. The rising cost of living, driven by inflation and increasing interest rates, is placing pressure on both consumers and businesses, with nearly half of the population reporting financial strain.

- Retail sales increased 1.5% in June 2025 to \$70.2 billion, with gains across all nine subsectors, led by food and beverage retailers.
- E-commerce sales were down 1.7% to \$4.2 billion, accounting for 5.9% of total retail trade. While E-commerce sales were down, this retail sector continues to capture a significant portion of the retail sector, impact brick-and-mortar establishments.
- Rising interest rates to address inflation have slowed lending, increased business operating costs, and cut even further into retail operating margins. Interest rate pressures have eased in 2025 but remain elevated.
- The stagnation of retail spending can be attributed to the rising cost of living and concerns around tariffs. The Canadian Social Survey found that in spring 2024, 45% of Canadians reported that rising prices were affecting their daily expenses, a 12% increase since 2022.
- Consumer confidence is down, and Canadians are spending less in response to rising costs.

Retail sales have remained relatively stagnant since 2021, with a slight uptick in late 2025.



*Many Canadians are cutting back spending*

**53% of Canadians are planning to cut back on eating out in 2024.**

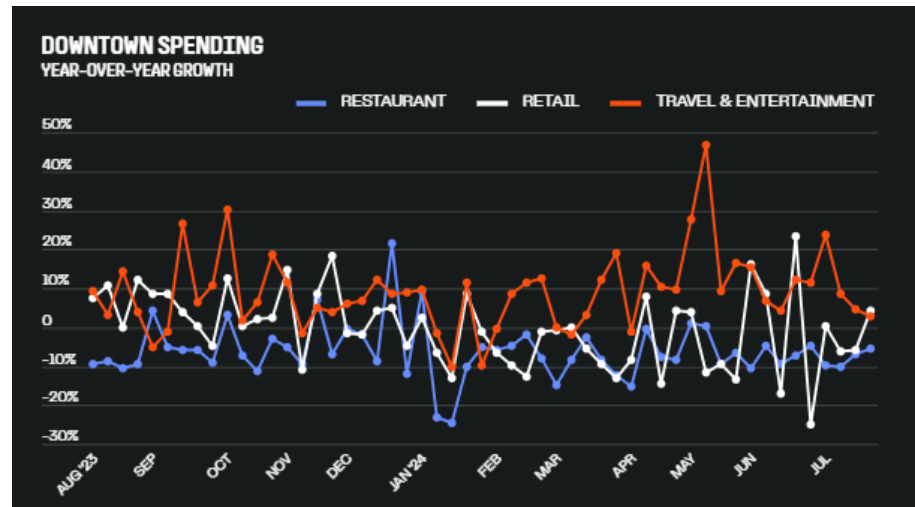
**45% of Canadians are planning to spend less on entertainment in 2024.**

# Downtown Economic Trends: 2024

**Downtown Vancouver had not fully recovered from the pandemic by the close of 2024. Sales and visitation in other commercial nodes near downtown remained below pre-pandemic levels. Accordingly, it is difficult to distinguish between construction/pilot impacts and macro trends.**

- Findings in Gastown reflect broader national trends in Canada, as many retail categories experienced stagnant or declining sales in 2024.
- Downtown office vacancy increased consistently from 2020 to 2024, from 2% to 14%.
- Pedestrian visits to W Hastings, Robson, Granville, and Alberni remain below pre-pandemic levels.
- Downtown pedestrian traffic saw a considerable uptick in June of 2024 – a promising sign.
- Travel & entertainment spending was up 9.3% on the year.
- Overall retail spending was -1.9% below 2023 levels and restaurant spending declined -7.6%.
- Consumer confidence was down, and Canadians are spending less in response to rising costs.

*Downtown Spending: 2024 Downtown Monthly Restaurant and Retail Spending Remains Below 2023 Levels; Travel and Entertainment Spending is Up.*



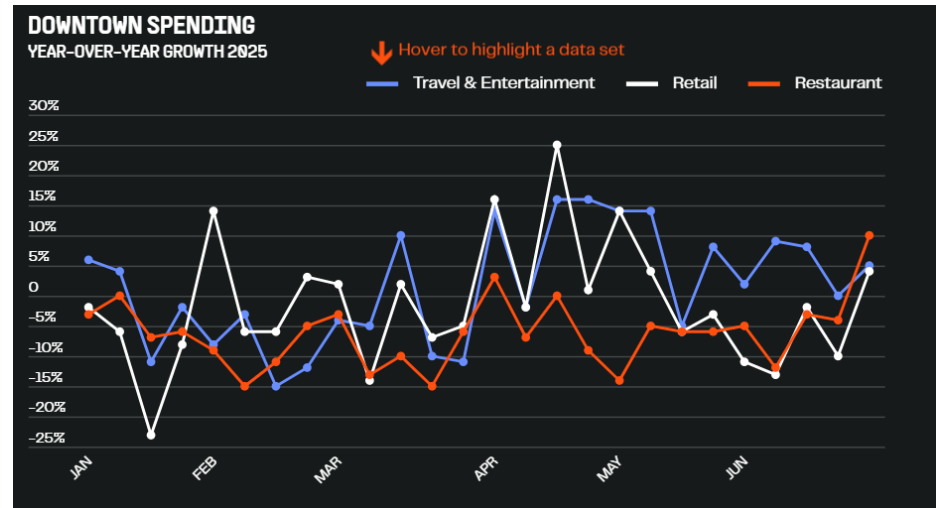
Source: All information unless otherwise stated is taken directly from Vancouver Downtown BIA Website, updated September 26, 2024. The original data source unless otherwise stated is Moneris. This page may include additional detail regarding downtown spending trends by retail category, as available and applicable.

# Downtown Economic Trends: 2025

Downtown visitation and spending declined in the last year, but 2025 tourism growth and nightlife activity remain important bright spots for the local economy.

- Retail spending improved modestly in Q2 2025, growing 1.3% YoY and reversing the decline recorded in early 2025.
- Restaurant spending remains below 2024 levels, though performance strengthened in Q2 compared with Q1.
- Travel and entertainment spending continued to outperform other categories downtown, rebounding 7.6 percent in Q2 after early-year declines.
- Overall, Downtown spending has stabilized but remains below pre-pandemic levels, with tourism and nightlife activity continuing to drive recovery.

*Downtown Spending: 2025 Downtown Monthly Sales Volume. Restaurants remain stagnant throughout the summer months, as travel and entertainment peaked in May but dipped in July as well.*

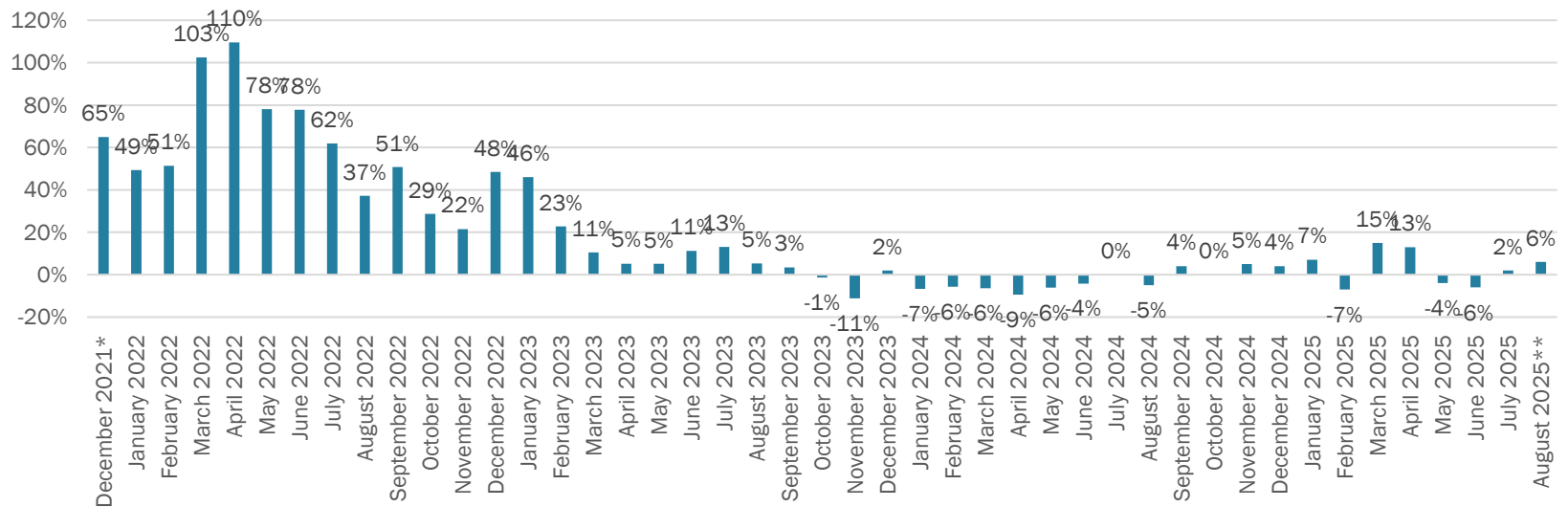


Source: All information unless otherwise stated is taken directly from Vancouver Downtown BIA Website, updated August 25, 2025. The original data source unless otherwise stated is Moneris. Note: This page may include additional detail regarding downtown spending trends by retail category, as available and applicable.

# Gastown Retail Sales Trends

Throughout much of 2024, retail sales in Gastown remained below 2023 levels, with the steepest declines in the first half of the year. Sales rebounded late in 2024, posting modest gains in November and December. In 2025, performance has been mixed: January and February were down compared with 2024, but March and April showed double digit year over year growth. Results softened again in May and June, before improving during the pilot period with sales up 2 percent in July and 6 percent in August.

Year-Over-Year Total Retail Sales Volume in Gastown  
(Monthly Sales from December 2021 – August 2025)



Source: JS&A analysis using Moneris data (August 2025).

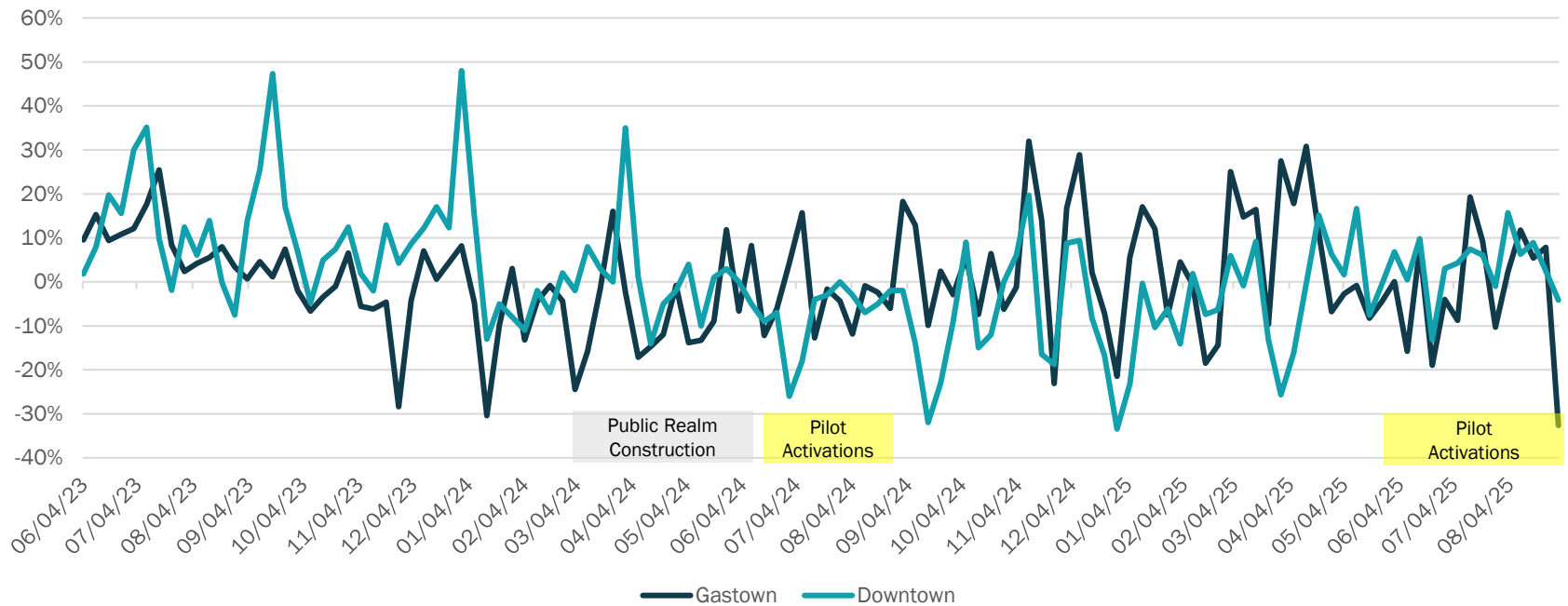
\*December 2021 data provided to JS&A represents the last week of December 2021.



# Gastown and Downtown Retail Sales Trends

Year-over-year retail sales in both Gastown and Downtown have followed similar seasonal patterns since 2023, with recurring summer peaks and winter slowdowns. Gastown experienced stronger fluctuations than Downtown, with pronounced dips in late 2023 and early 2024 followed by renewed gains in spring 2025. Sales activity increased through much of the summer but declined again in late August, while Downtown showed smaller swings and a more stable recovery overall.

Year-Over-Year Total Retail Sales Volume in Gastown and Downtown  
(Weekly Sales from June 2023 – August 2025)



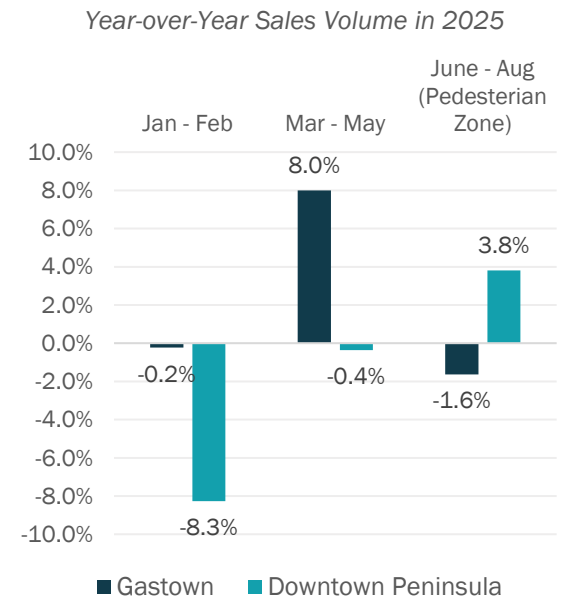
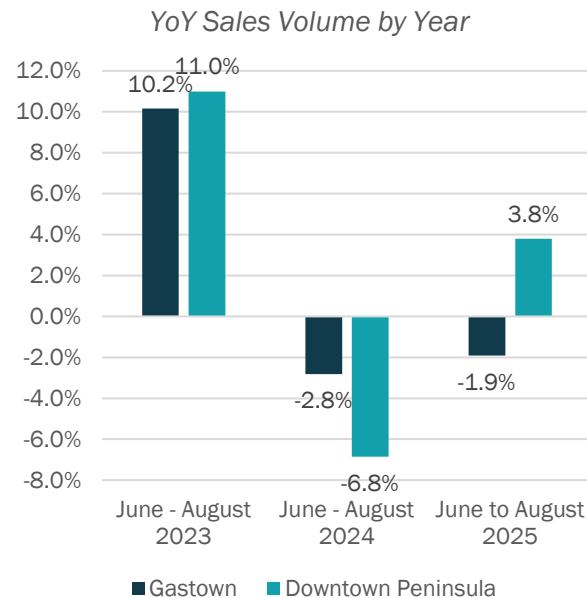
Source: JS&A analysis using Moneris data (August 2025).

\*Data could show seasonal variations or other external events influencing sales volume activity.



# Gastown and Downtown Retail Sales Trends

During the June–August 2025 pilot period, Gastown sales rose in July before dipping slightly in August, while Downtown-wide sales increased more strongly over the same months. This marks a mixed performance compared with 2024, when Gastown saw marginal gains in July but a sharper decline in August. (The prior year, 2023, saw a swell of retail sales throughout the City as it recovered from record lows during the Pandemic.) Year to date, Gastown sales are modestly higher than in 2024, though average growth during the summer pilot months remained below Downtown’s. Earlier in the year, Gastown outperformed Downtown between March and May, but Downtown showed stronger year-over-year growth through the summer, reflecting a steadier pattern of recovery.



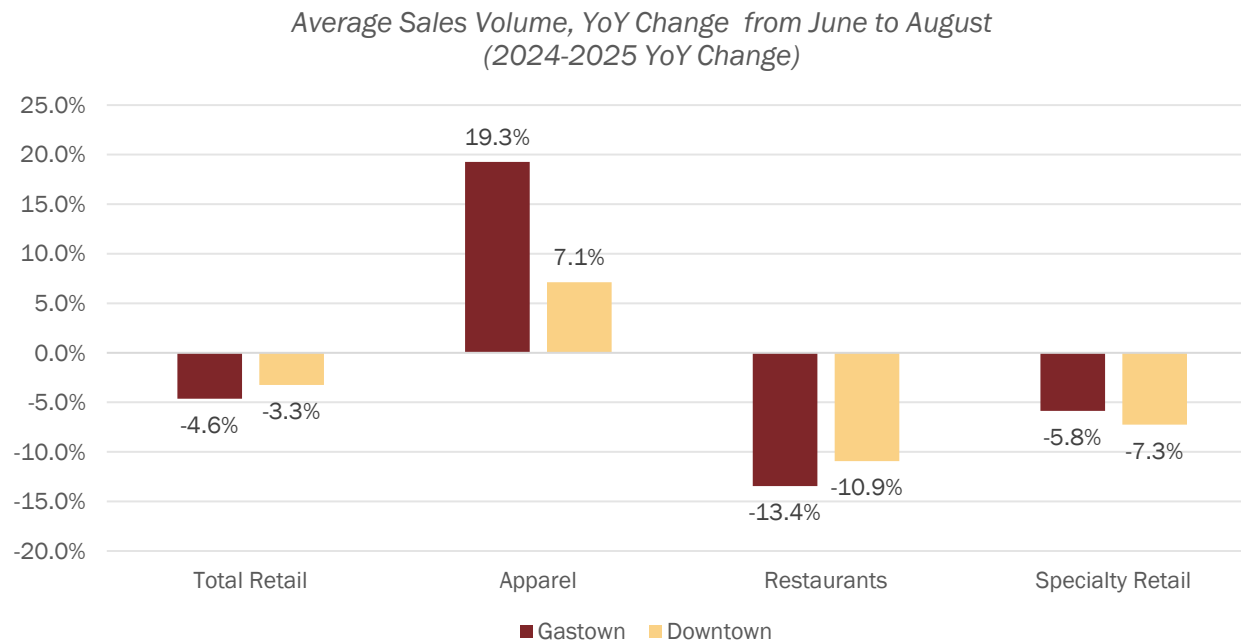
Source: JS&A analysis using Moneris data (August 2025).

\*Data could show seasonal variations or other external events influencing sales volume activity.



# Gastown and Downtown Retail Sales Trends

Summer retail sales (in the months of June through August) in both Gastown and the Downtown peninsula declined slightly in 2024 after a strong recovery year in 2023, and then declined slightly further still in 2025. Total Gastown retail sales are down 4.6 percent over the last two years and total Downtown peninsula retail sales are down 3.3 percent. Among sectors, apparel showed the strongest year-over-year growth, particularly in Gastown, where sales increased nearly 20 percent compared with 7 percent downtown. Restaurant spending continues to lag, with declines of 13 percent in Gastown and 11 percent downtown, reflecting continued consumer caution and higher operating costs. Specialty retail saw modest declines in both areas, suggesting stable but subdued activity across smaller retail categories.



Source: JS&A analysis using Moneris data (August 2025).

\*Data could show seasonal variations or other external events influencing sales volume activity.

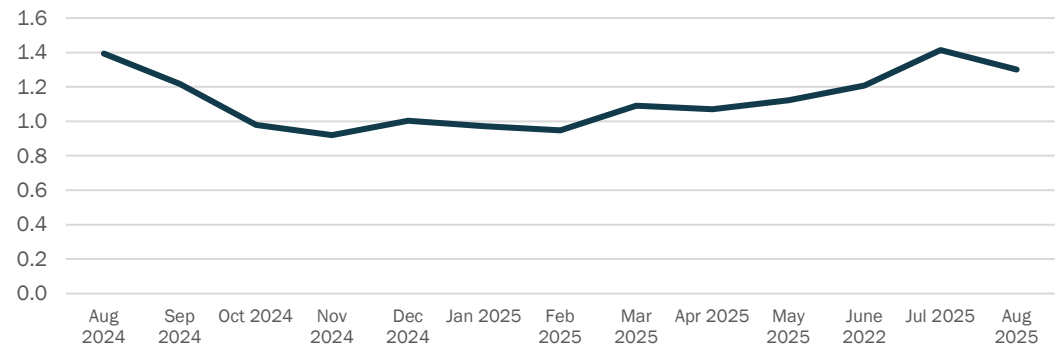


# Gastown Seasonality and Sales by Business Type

Apparel and professional services have recorded the strongest sales volume gains in Gastown in 2025. Sales volume still peaks in July, while the off-peak season continues to stretch from October through April.

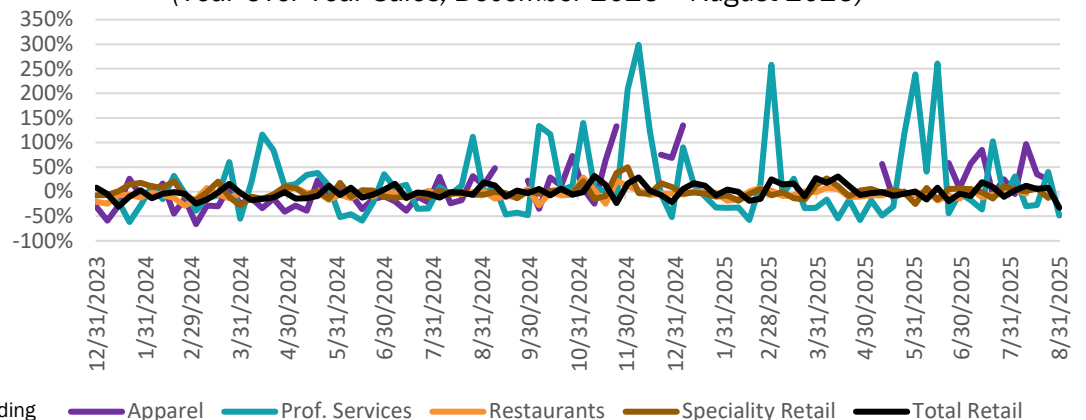
- Retail sales are highly seasonal in Gastown. It peaks in July, which generates about 40% more monthly sales volume than the October-to-March off-season.
- In 2025, apparel (up 43 percent) and professional services (up 17 percent) have seen the most increase to date compared with 2024. Restaurants (-4 percent) and specialty retail (-1 percent) are slightly down. Overall retail sales in Gastown are up 2.3 percent year to date.
- Not all businesses have the same experience: some are doing well, while others are struggling.

Total Retail Indexed Sales Volume (Within Year Only) in Gastown (Indexed Sales, August 2024 – August 2025)



Note: Moneris year-over-year index data compares each period to the same period in the prior year. Indexed charts are not cumulative across years.

Sales Volume in Gastown by Business Type (Year-Over-Year Sales, December 2023 – August 2025)



Source: JS&A analysis using Moneris data through August 2025.  
 Note: Data smoothing applied to an outlier in professional service spending for the week of July 2024.  
 Apparel sales volume data are not available for the full year and are thus partially omitted from the bottom chart.



# Gastown Sales During Construction and Pilots: 2024

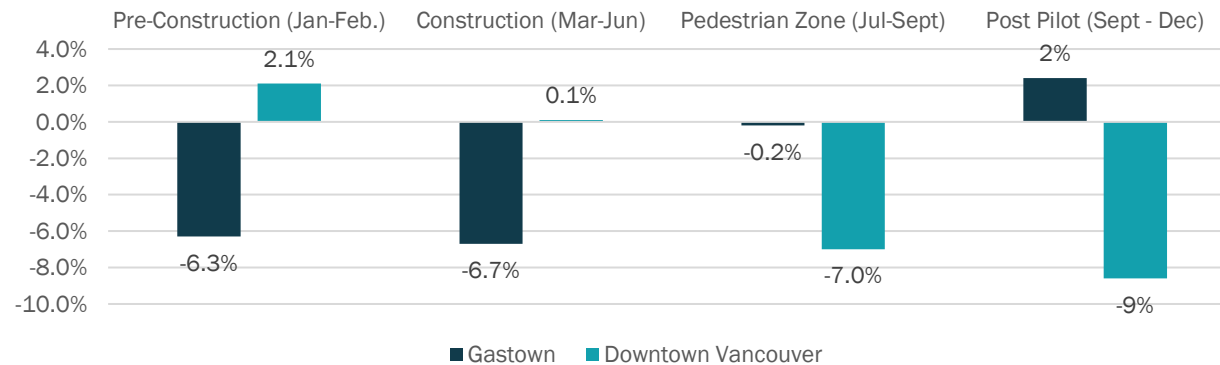
Downtown Vancouver and many prominent retail corridors in the City experienced a decline in sales over the first half of 2024. While businesses in Gastown may have been negatively impacted by the public realm construction period from April – June 2024, there was not a noticeable impact on sales data during this period. Relative to the proceeding months, there was a discernable uptick in business sales during the pilot period to date.

- Overall business sales volume in Downtown (-3.7%) and in Gastown (-2.5%) were down on the year in 2024.
- While businesses in Gastown may have been negatively impacted by public realm construction during March, April, May, and June 2024, the decline in sales was in keeping with the proceeding months and other commercial areas.
- During pilot activations starting in early July 2024, businesses in Gastown outperformed Downtown businesses (on a year-over-year basis). During this period, total sales in Gastown were down -0.2%, compared to -7.0% downtown (Jul-Sept).
- Post-pilot, Gastown outperformed Downtown businesses. During this period, total sales in Gastown were above 2%, compared to -9% downtown.

Sales Volume in Gastown and Downtown  
(Year-Over-Year Sales, January 2024 – December 2024)

Project Status	Month	Gastown (YoY Sales)	Downtown (YoY Sales)
Pre-Construction	Jan. 2024	-7%	7%
Pre-Construction	Feb. 2024	-6%	-5%
Construction	Mar. 2024	-6%	2%
Construction	Apr. 2024	-9%	3%
Construction	May 2024	-6%	-1%
Construction	June 2024	-4%	-5%
Pilot Activations	July 2024	0.3%	-9%
Pilot	Aug 2024	-5%	-3%
Post-Pilot	Sept 2024	4%	-16%
Post-Pilot	Oct 2024	0.4%	-5%
Post-Pilot	Nov 2024	5%	-2%
Post-Pilot	Dec 2024	4%	-8%

Year-Over-Year Sales Volume in 2024



Source: JS&A analysis using Moneris data (December 2024).

Note: There are numerous methods with which to assess sales trends, and all data sources have limitations. As a result, spending and visitations figures should be seen as approximations. Note: Calculations performed during the Pedestrian Pilot include the first week of September, when the program concluded. The bar chart reflects this average.



# Gastown Sales During Pilot: 2025

Downtown Vancouver and Gastown continues to experience uneven sales performance in 2025. While businesses in Gastown also saw mixed results early in the year, sales during the July to August period posted year-over-year gains. Compared with same period in 2024, Gastown’s pilot results modestly positive and tracked below downtown overall, which also saw growth.

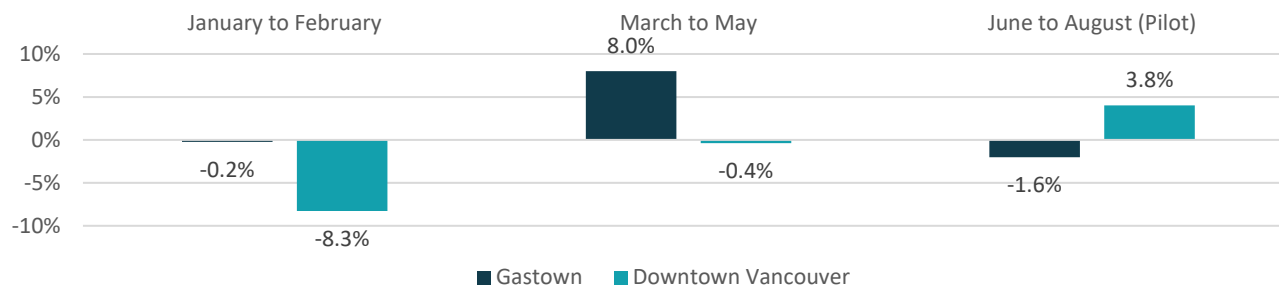
- Overall sales trends in 2025 have been mixed in both Gastown and downtown, with monthly results alternating between growth and decline.
- Gastown saw strong gains in March (+15%) and April (+13%), but sales decreased in May (-4%) and June (-6%).
- During the June–August pilot period, Gastown sales were down (-1.6% year-over-year, compared with downtown’s +3.8% increase).
- The pilot period outcomes did not show improvement compared with 2024, when Gastown also recorded negative sales volume during the similar time period.

Sales Volume in Gastown and Downtown  
(Year-Over-Year Sales, January 2025 – August 2025)

Project Status	Month	Gastown (YoY Sales)	Downtown (YoY Sales)
Inactive	Jan. 2025	7%	-10%
Inactive	Feb. 2025	-7%	-6%
Inactive	Mar. 2025	15%	-5%
Inactive	Apr. 2025	13%	1%
Inactive	May 2025	-4%	3%
Pilot	June 2025	-6%	1%
Pilot	July 2025	2%	4%
Pilot	Aug 2025	-1%	6%

Percentages rounded to the nearest whole number in this table.

Year-Over-Year Sales Volume in 2025



Source: JS&A analysis using Moneris data (August 2025).

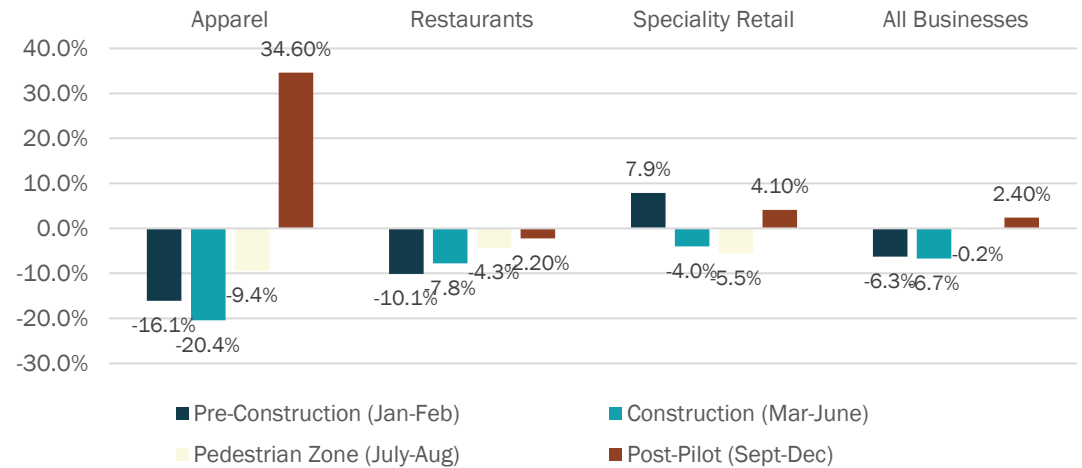
Note: There are numerous methods with which to assess sales trends, and all data sources have limitations. As a result, spending and visitations figures should be seen as approximations.

# Sales During Construction and Pilots By Business Type: 2024

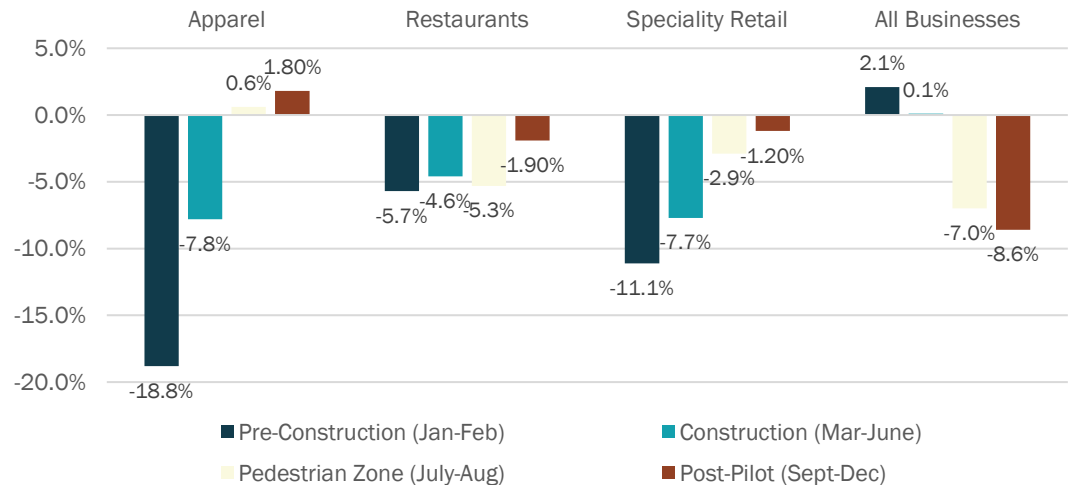
## Sales by retail category

- During pilot activations, restaurants in Gastown performed markedly better on a year-over-year basis than they did throughout the other parts of the year (see graphs). While restaurants and overall sales saw a significant uptick during and after the pilots, apparel and specialty retail declined -9.4% and -5.5%, respectively, during the pilot activations.
- Post-pilot, apparel and specialty retail increased 34.6% and 4.1%, respectively.

Year-over-Year Sales Volume in Gastown by Business Type (2024)



Year-over-Year Sales Volume in Downtown by Business Type (2024)



Source: JS&A analysis using Moneris data (December 2024).  
 Note: There are numerous methods with which to assess sales trends, and all data sources have limitations. As a result, spending and visitations figures should be seen as approximations.

Note: Calculations performed during the Pedestrian Pilot include the first week of September, when the program concluded. The bar chart reflects this average.

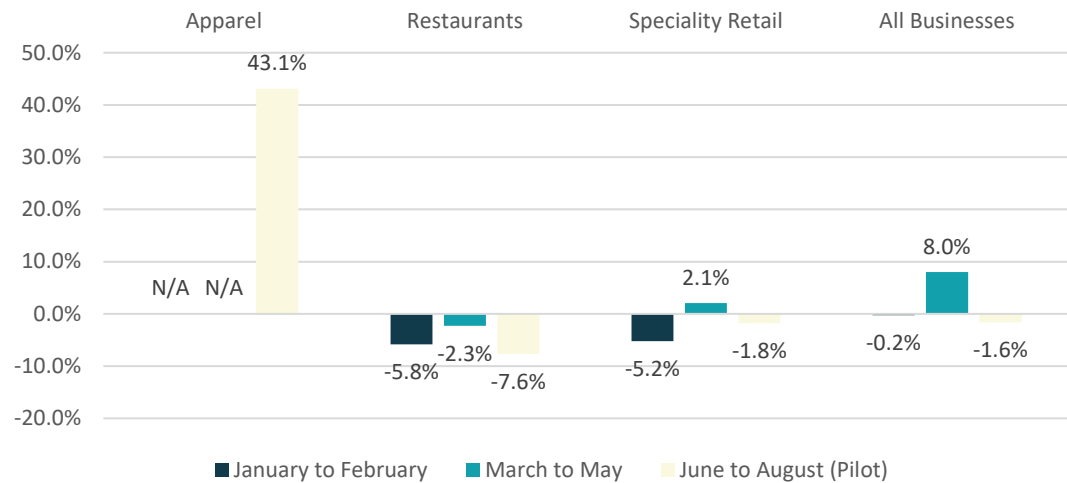
Note: Apparel sales volume data are not available for Weeks 34-35 and 45-47 and are thus omitted from the charts.

# Sales During Pilots By Business Type: 2025

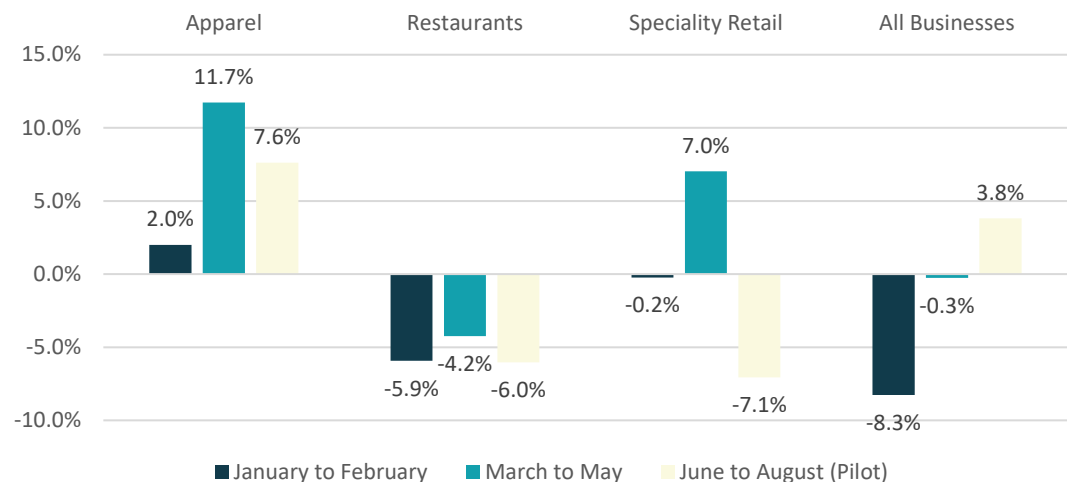
## Sales by retail category

- During the 2025 pilot period, apparel businesses in Gastown saw the largest year-over-year gains, with sales up 43% in August. Restaurants (-7.6%) and specialty retail (-1.8%) were both slightly down, while overall sales across all businesses decreased by -1.6%
- In comparison, downtown overall saw sales gains for the Apparel during the pilot period (+7.6%), contributing to an overall increase of 3.8%. Restaurants (-6.0%) and Specialty Retail (-7.1%) also decreased during the same time period.

Year-over-Year Sales Volume in Gastown by Business Type (2025)



Year-over-Year Sales Volume in Downtown by Business Type (2025)



Source: JS&A analysis using Moneris data (August 2025).

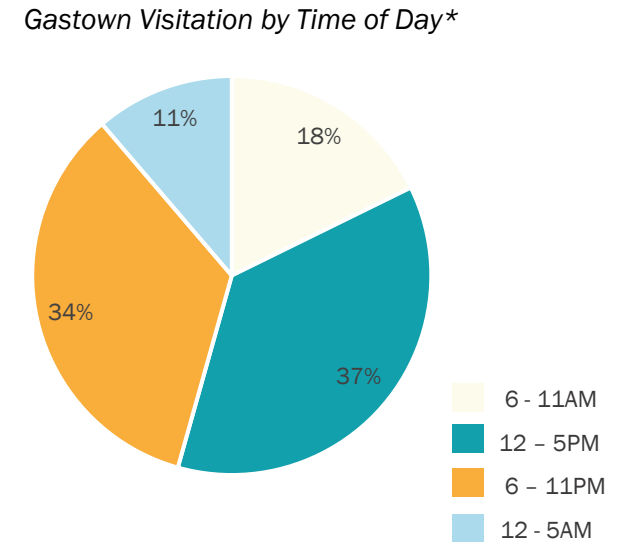
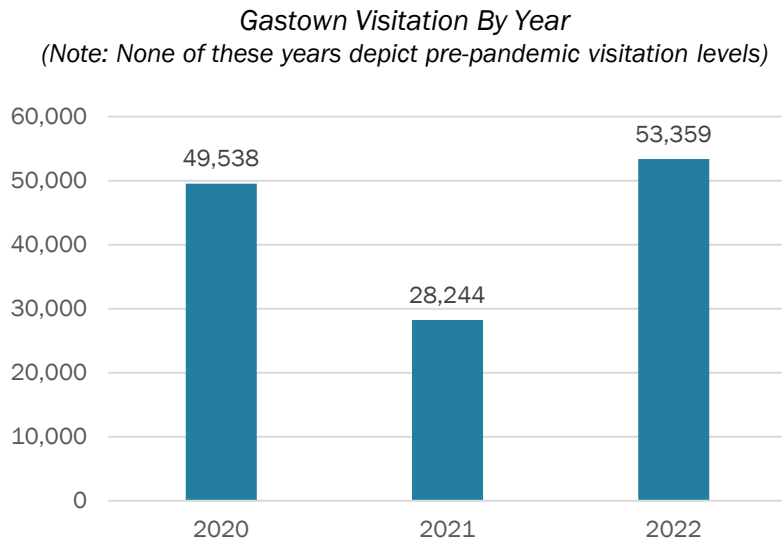
Note: There are numerous methods with which to assess sales trends, and all data sources have limitations. As a result, spending and visitations figures should be seen as approximations.

Note: Gastown apparel sales volume data not available for the full year, so some months are partially omitted from the chart.



# Gastown Visitor Trends: 2024

Gastown had a relatively high level of visitation throughout the day, including sizeable activity before noon and after midnight. Visitation nearly halved in 2021 during the later stages of the pandemic.



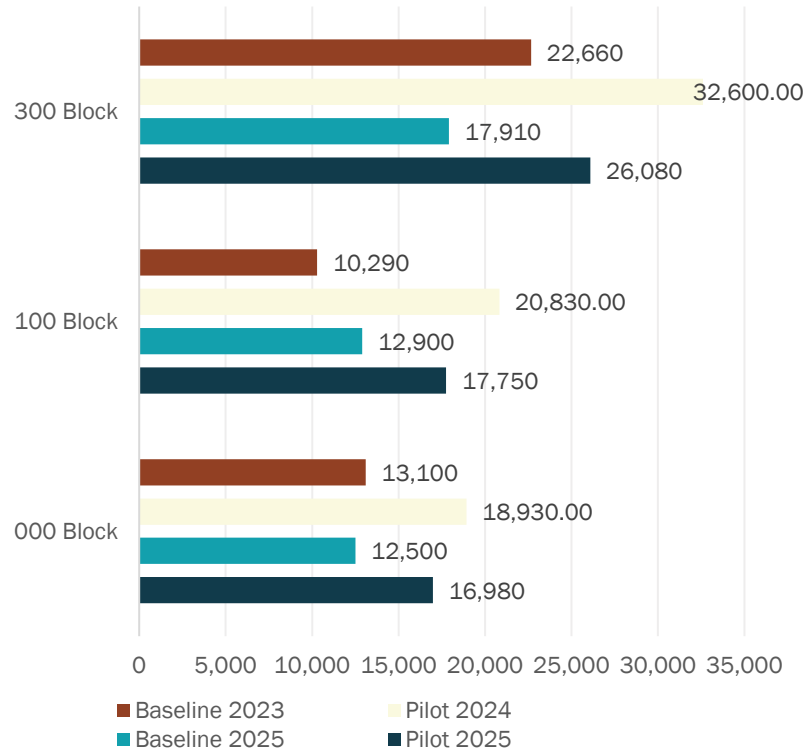
Source: JS&A analysis using Moneris data (2023 data).

\*Note: Pie chart represents 2022 figures. Visitation by time of day across 2020, 2021 is relatively consistent.

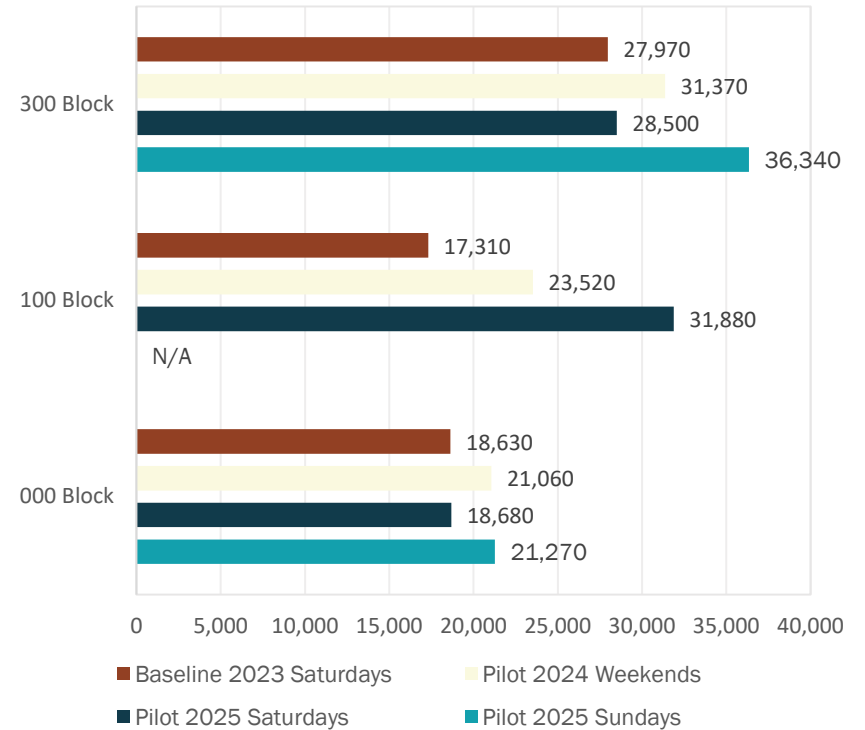
# Gastown Visitor Trends: 2025

Pedestrian volume data supports the weaker retail performance, as weekday pedestrian volume counts were lower this year compared to the prior year, Pilot 2024

Water St 24 hr Pedestrian Volumes - Weekdays  
(Preliminary Data)



Water St 24 hr Pedestrian Volumes - Weekends  
(Preliminary Data)



Source: City of Vancouver (2025). Pedestrian data are preliminary, thus subject to change.

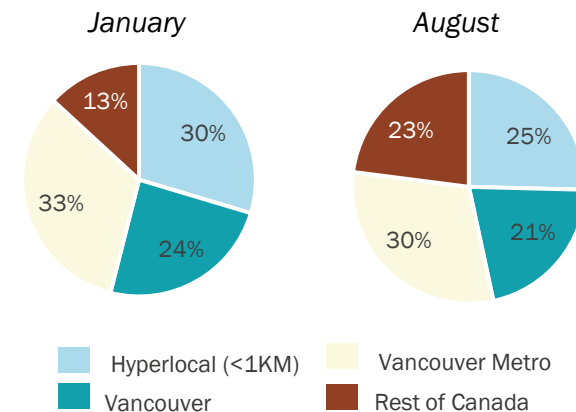


# Gastown Customer Origin: 2024

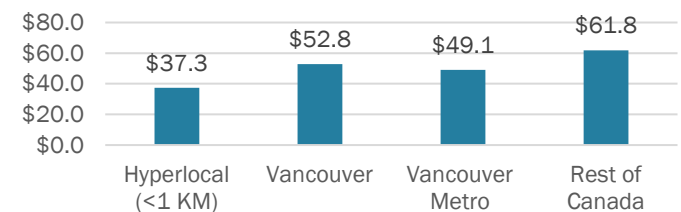
Gastown’s largest Canadian customer base is “destination visitors” — people living outside of the immediate neighborhood but within a reasonable drive or transit distance to visit Gastown for entertainment, shopping, or dining purposes. This market area also represents the greatest opportunity from which to draw additional customer traffic.

- Gastown’s customer base can be divided into three main categories with different spending patterns and retail needs: “local residents” (those residing within 1km of Water Street); “destination visitors” who are within driving or transit distance (within 50km of Water Street) and come to Gastown for a particular shopping or entertainment objective; and “outside visitors,” predominantly tourists and, to a lesser extent, business travelers, visiting Vancouver from outside of the region. Many of these visitors walk to Gastown from the nearby cruise ship port.
- For the purposes of this analysis, the category of “destination visitors” is divided into two subsegments: (i) residents within the City of Vancouver and (ii) residents in outlying municipalities (within 50km of Gastown). Together, destination visitors account for 55% of sales in the summer and 64% of sales during the winter.
- Visitation from outside of the region more than doubles during the summer, and the total share increases from 13% to 23%, marking the importance of establishing a stable customer base throughout the year and outside of peak season.
- Customer spending increases along with the distance of the visitor’s point of origin.
- Attracting additional destination visitors from the metro area will be key to success for Gastown and should be a focus of design and marketing efforts.

Proportion of Transactions by Point of Origin (2024, Domestic Customers Only)



2024 Average Spend by Customer Point of Origin



Source: JS&A analysis using Moneris data (December 2024).  
\* Note: Includes only transactions verified through Moneris point of sale systems and does not include spending of foreign visitors; data does not represent an all-inclusive transaction count.

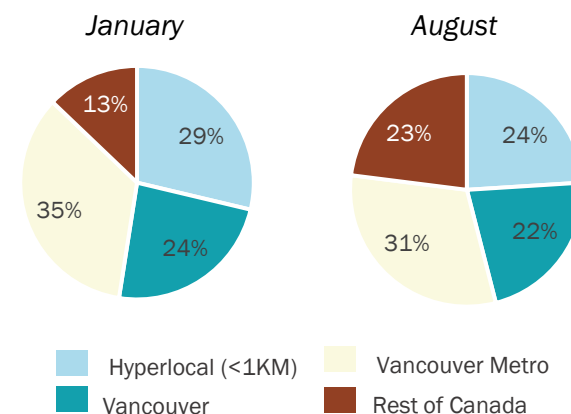


# Gastown Customer Origin: 2025

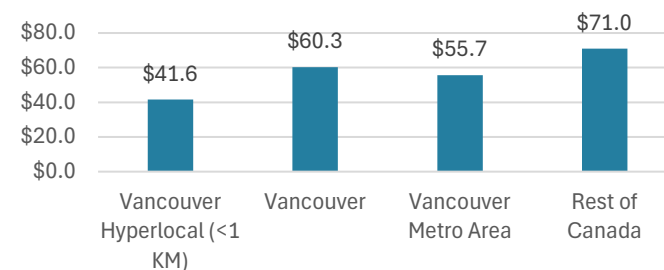
Gastown’s largest Canadian customer base is “destination visitors” — people living outside of the immediate neighborhood but within a reasonable drive or transit distance to visit Gastown for entertainment, shopping, or dining purposes. This market area also represents the greatest opportunity from which to draw additional customer traffic.

- Gastown’s customer base can be divided into three main categories with different spending patterns and retail needs: “local residents” (those residing within 1km of Water Street); “destination visitors” who are within driving or transit distance (within 50km of Water Street) and come to Gastown for a particular shopping or entertainment objective; and “outside visitors,” predominantly tourists and, to a lesser extent, business travelers, visiting Vancouver from outside of the region. Many of these visitors walk to Gastown from the nearby cruise ship port.
- In 2025, destination visitors remained the largest share of sales, accounting for 57 percent in January and 53 percent in August. This group includes both City of Vancouver residents and those from the wider metro area.
- Visitors from outside the region grew from 13 percent of transactions in January to 23 percent in August, highlighting the importance of summer tourism.
- Customer spending continues to increase with distance traveled. Average spend was lowest among City of Vancouver residents (\$41.6) and highest among visitors from outside the region (\$71.0).
- Attracting additional destination visitors from the metro area will be key to success for Gastown and should be a focus of design and marketing efforts.

Proportion of Transactions by Point of Origin (2025, Domestic Customers Only)



2025 Average Spend by Customer Point of Origin



Source: JS&A analysis using Moneris data (August 2025).  
 \*Note: Includes only transactions verified through Moneris point of sale systems and does not include spending of foreign visitors; data does not represent an all-inclusive transaction count.



# Business and Visitor Sentiment: 2024

**Nearly 60% of surveyed businesses were interested in the Pedestrian Zone returning in future summers. Many of the most successful pedestrianization efforts in North America had similarly low (or lower) levels of business owner support during planning and construction.**

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- A slight majority (60%) of businesses in Gastown were in favor bringing back the Water Street Pedestrian Zone Pilot (Water Street Pedestrian Zone Survey: Business Survey)
- Most businesses agreed that visitation to Gastown increased due to the pilots in July and August.
- About half of businesses reported an increase in sales during this period and half report a decrease over this period. Restaurants and merchandise retailers seem to be impacted similarly, on average.
- Businesses that expanded outdoor seating and/or displays seemed to capture additional customers and generate higher sales during pilots; many of the businesses that did not make adjustments to capitalize on the increased visitor traffic saw a less pronounced impact on sales.
- A large portion of the increased visitor traffic during pilots were locals (43% walked) (Gastown Intercept Survey 2024).
- Only 13% of visitors came by vehicle, and those that did had the most negative perceptions. Drivers were uncertain about where to park and seem to be put off by the cost of parking.

Note: The content on this slide represents JS&A's assessment of the findings from two sources of primary data collected by the City of Vancouver: (a) a businesses survey and (b) a pedestrian intercept survey.



# Business and Visitor Sentiment: 2025

Nearly three-quarters (72%) of surveyed businesses are interested in the Pedestrian Zone returning in future summers, up from about 60% in 2024. This growth in support suggests improving perceptions even as impacts remain mixed across business types.

## Business Impacts

- 53% of businesses reported higher or somewhat higher revenues on car-free Sundays, while 14% reported decreases; 15% were not open on Sundays. In comparison to 2024, 37% of businesses reported higher or somewhat higher revenues.
- Half of businesses reported an increased or somewhat increased foot traffic during the pilot. In comparison to 2024, 34% reported increased or somewhat increased foot traffic.
- A majority (65%) rated the broader public space enhancements as positive, though views on operations and deliveries were more mixed (15% positive, 25% negative).
- 72% of businesses want the pedestrian zone to return in future summers, an increase of about 10 percentage points from 2024.

## Visitor Experience

- Sunday visitation to businesses rose to 45% in 2025, compared with 20% on Sundays in 2024.
- Average visitor spending increased from \$81 in 2024 to \$91 in 2025, with Sundays highest at \$98.
- 91% of Sunday visitors agreed the pedestrian zone “creates a destination that draws me to visit Gastown more,” up from 83% in 2024.
- Comfort and vibrancy scores were strong, with 89% of Sunday visitors agreeing Water Street is a comfortable place to spend time and socialize.
- Safety ratings dipped slightly compared to 2024 but remained relatively high, with 77% of Sunday visitors feeling safe walking or rolling.

Note: The content on this slide represents JS&A's assessment of the findings from two sources of primary data collected by the City of Vancouver: (a) a businesses survey and (b) a pedestrian intercept survey that were conducted during the pedestrian zone. 2024 and 2025 surveys may not have had identical respondent samples. Results should be interpreted as directional comparisons rather than a strict year-over-year comparison.



# Historical Precedent and Case Study Findings

**Pedestrianization can boost visitation, sales, and property values, but it requires flexibility, local partnerships, and careful design to balance the needs of businesses, residents, and tourists. Effective branding and programming are essential for long-term success, ensuring that pedestrian streets serve both locals and visitors.**

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- Pedestrianizing a preeminent commercial node typically attracts additional numbers of outside visitors, which often leads to an increase in overall sales revenue, land values, and commercial rents.
- It can be difficult to distinguish the impact of pedestrianization vs. the impact of broader real estate and socioeconomic trends. That said, pedestrianization is likely to further shift the retail mix and orientation toward entertainment, recreation, and food and beverage. These streets often become entertainment or arts and culture districts. The number of neighborhood-serving services and retailers may decline post pedestrianization.
- A successfully activated pedestrian street does not have to be permanent, and some highly successful pedestrian streets implement seasonal closures. Pedestrianization efforts should be flexible, allowing the City to adapt to potential unforeseen outcomes and make future changes regarding where and when vehicles can access.
- Businesses that take advantage of pedestrianization tend to benefit more from it. Examples include outdoor signage and merchandise displays, outdoor seating, and corresponding marketing and promotional efforts.
- Partnering with a local business advocacy organization is crucial in creating a successful pedestrian street program. These organizations bolster the benefits of pedestrianized streets through their roles in marketing, event activation, and leasing assistance, and can help mitigate negative externalities.
- The design of a pedestrian street should allow for flexible use for events and programming, including electrical hookups, sound systems, sidewalk seating, wayfinding, and clear directives for cars and loading. Programming and maintaining the district will demand considerably more resources from both the City and the Gastown BIA.
- Public perception matters and deliberate branding and messaging is essential. Poor public perception about the street can impact visitation and desirability during the construction period and beyond.
- The benefits of a pedestrian street can extend to residents, not just tourists. Deliberate actions, such as programming and events catered to residents, can ensure that locals, destination visitors, and outside tourists can all benefit.

Note: The content on this slide is taken from a companion document created by JS&A for the Gastown Public Space Plan: “Pedestrianized Streets Case Studies. The purpose of the case studies is to identify outcomes and lessons learned from prior pedestrianization efforts and highlight key implications or strategic opportunities for the City of Vancouver. The case studies include four pedestrian street programs: Argyle Street (Halifax, Nova Scotia), Third Street Promenade (Santa Monica, California), Occidental Square (Seattle, Washington), and the Downtown Pedestrian Mall (St. John’s, Newfoundland). All information summarized in this report was obtained from primary source interviews unless stated otherwise.



# Pedestrianization Implications and Projections

**Pedestrian-first public realm improvements on Water Street have the potential to elevate a business's brand identity and increase customer traffic. While overall sales are likely to increase, not all businesses will benefit equally; however, there is potential for benefits to be shared by visitors, residents, and workers alike.**

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- Pedestrianizing Gastown on a more regular (or permanent) basis can be expected to have the mid- and long-term impact of elevating the neighborhood as a preeminent destination for out-of-town visitors and destination visitors from across the region. An increased customer base typically results in an increase in overall sales revenue, land values, and commercial rents.
- Not all businesses will benefit. Establishments that cater to local customers or those that are unable to pay higher rents may be priced out or may wish to relocate.
- Pedestrianization is likely to further shift the retail mix and orientation toward entertainment, recreation, arts and culture, food and beverage, specialty retail, and souvenir shops. The number of neighborhood-serving services and retailers may decline post-pedestrianization.
- A successfully activated pedestrian street does not have to be permanent, and some highly successful pedestrian streets implement seasonal closures.
- Public perception matters and deliberate branding and messaging is essential. Poor public perception about the street can impact visitation and desirability during construction and beyond.
- The benefits of a pedestrian street can extend to residents, not just tourists. Deliberate actions, such as programming and events catered to residents, can ensure that locals, destination visitors, and outside tourists can all benefit.



# Preliminary Recommendations: 2024

**Measures exist to support or retain businesses that experience some negative impact from a pedestrian-first design of Water Street. In addition, there are steps the City can undertake to help preserve key aspects of Gastown’s business mix, aesthetics, and identity.**

- Pedestrianization efforts should be flexible, allowing the City to adapt to potential unforeseen outcomes and make future changes regarding where and when vehicles can access Gastown.
- Continue to work closely with the Gastown BIA, local businesses, and other partners to develop a successful pedestrian street program and provide enhanced support pertaining to marketing, safety, cleanliness, events, leasing assistance, and mitigation of negative externalities.
- The design of a pedestrian street should accommodate flexible use for events and programming, which includes electrical hookups, sound systems, sidewalk seating, wayfinding, and clear directives for cars and loading access. Programming and maintaining the district will demand considerably more resources: revenue streams and capacity should be assessed further.
- Public perception matters and deliberate messaging is essential. Poor public perception can impact visitation and desirability during construction and beyond.
- Enhance marketing and wayfinding oriented to drivers. “Enhanced awareness of the places people can park would likely increase satisfaction among this group” (Mustel Group).
- While all customer bases can be supported through a pedestrian-first design for Water Street, the customer base with the potential to provide the largest increase in numbers is likely to be destination visitors from across the Vancouver metropolitan area. Marketing should prioritize residents from throughout the region, as well as nearby residents, out of town tourists, local workers, and others.
- Support businesses in expanding outdoor seating capacity and setting up outdoor displays showcasing a business’s goods or services and helping to draw pedestrians into the business. Advise businesses on how to leverage pedestrianization marketing efforts.
- Consider helping the BIA conduct a strategic plan that identifies the core risks, concerns, and objectives pertaining to pedestrianization. Support can then be developed to assist some or all of the following types of businesses: (a) businesses that contribute to Gastown’s history, identity, or character; (b) businesses that serve as an important amenity to nearby residents or workers; (c) businesses that contribute to the retail mix or help enhance area vibrancy by drawing customers at off-peak times of the day, week, and year.



# Emerging Findings: Gastown and Downtown Comparison: 2025

**Gastown showed modest gains in 2025 compared with 2024, but Downtown recovered more strongly. While Gastown trended positive during the pilot months, overall sales and visitation suggest it has not rebounded as much as Downtown. This shift reverses the pattern from 2024, when Gastown fared somewhat better in a weaker year.**

- Gastown’s performance shows modest gains relative to 2024, but Downtown has seen stronger recovery overall.
- Compared with last year, Gastown has not rebounded as much as Downtown, suggesting a relative loss of competitive advantage.
- Downtown Vancouver overall outperformed Gastown in 2025, reversing the relative pattern from 2024 when Gastown fared somewhat better in a weaker year.
- The weaker performance of the 2025 Gastown Summer Pilot reflects broader macro trends, as Canadian consumers remain cautious in their spending, shaped by higher prices, interest rates, and broader economic uncertainty. In addition, restaurants across Vancouver are under pressure from higher food and labor costs, weaker weekday traffic, and a slowdown in U.S. visitors, which are factors that may influence the performance of the 2025 Gastown Summer Pilot.\*
- Pedestrian volume data supports the weaker retail performance, as weekday pedestrian volume counts were lower this year compared to the prior year, Pilot 2024 (see p.17).



# Emerging Preliminary Recommendations: 2025

The pilot continues to be well received as a public space activation, but measurable economic impacts remain limited and difficult to separate from broader trends. Business outcomes are mixed, visitor origin patterns have not shifted significantly, and future efforts could focus on drawing more residents from across the region.

- National and regional changes in business conditions and consumer preferences make it difficult to isolate variables such as the specific impact of pilot events on business revenues in Gastown. Other factors that complicate the impact of pilot events difficult to quantify include:
  - Pilot events occurred on Sundays but the spending data set spanned week-long periods. We do not have day-specific data or know the extent that pilot event influenced customer behavior on the other days of the week (if at all).
  - We do not know the interplay between national trends of declining customer spending (especially at restaurants and specialty retail) vs. potential increase in visitor spending due to pilot events.
- Business and visitor survey responses generally reinforce the idea that the pedestrian zones are not producing a strong net positive or negative effect. While a larger share of businesses expressed support for the pedestrian zone in 2025 compared with 2024, but the split in reported revenue impacts suggests that outcomes remain uneven and sector-dependent.
- Visitors reported higher satisfaction and spending on Sundays, but these positive sentiments do not appear to translate into a clear shift in overall sales or visitation trends when compared with Downtown. This may reflect the inherent limited nature of Sunday-only pedestrian zones, as it does not span enough time to make a significant impact across a full week.
- Taken together, the survey results support the conclusion that the pilots are well received as public space activations, but their measurable economic impacts remain limited and difficult to isolate.
- There are no major changes in spending and visitation trends between 2024 and 2025 or between Gastown and Downtown that tell a clear story about the impact of the pilot events. **As such, it seems likely that the pilot programs in Gastown, on average, do not have a particularly positive nor negative impact on retail sales over the course of the summer months.**
- **Downtown Vancouver and the greater downtown peninsula have outperformed Gastown over the last year, and particularly during the pilot period (both in terms of retail sales and pedestrian activity). This indicates that Gastown may be losing its competitive advantage.**
- **The mix of Gastown visitor origin point has not shifted in a significant way from 2024 to 2025. (Specifically: neighborhood residents, Vancouver residents from outside neighborhoods, and residents of other municipalities in the region have each seen a 1% proportional increase in visitor traffic.) This is a missed opportunity, as the pilot event should be leveraged to draw more residents from throughout the region and help more people gain comfort and familiarity in visiting Gastown.**



# Appendix: Data Limitations and Considerations

**Moneris provides one of the most current measures of retail spending in Canada, based on credit and debit transactions across key sectors. Covering about 30 percent of Canadian merchants and weighted to reflect the national retail mix, it serves as a reliable proxy for local spending trends. While it excludes cash transactions and some small independents, it remains the most widely used real-time source for tracking retail activity.**

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- Moneris data is based on credit and debit transaction volume processed by Moneris merchants.
- The data are anonymized, so that it does not identify any Moneris merchant or individual.
- Moneris data are aggregated results that are consistent, comparable, and a reflection of the market-based economic trends.
- To ensure the data reflects market-based economic trends, discretion is used in determining whether to exclude “large” merchant(s) whose volume patterns appear merchant-specific rather than an appropriate reflection of a general economic trend for the respective industry and/or location that the merchant(s) belong to.
- The data reflects transactions made at Moneris merchants and processed by Moneris. Therefore, there may exist biases among Moneris merchants in the chosen reporting metrics.
- Moneris provides one of the most current and granular views of retail sales activity in Canada, capturing credit and debit transactions across key sectors such as restaurants, retail, and personal services.
- Data are updated weekly, allowing more timely tracking of spending trends than traditional sources such as Statistics Canada or annual business surveys.
- Moneris data are the standard reference used in news publications and economic reporting, including outlets like The Globe and Mail, Retail Insider, and Business in Vancouver, to assess short-term shifts in consumer spending.
- The dataset represents up to 30 percent of Canadian merchants and is weighted to reflect the national retail mix, making it a strong proxy for local spending patterns.
- While it does not include cash sales and some small independent merchants, it remains the most comprehensive real-time indicator of retail activity available at the district or neighborhood scale.



Arts & Culture Museum

Little Mountain

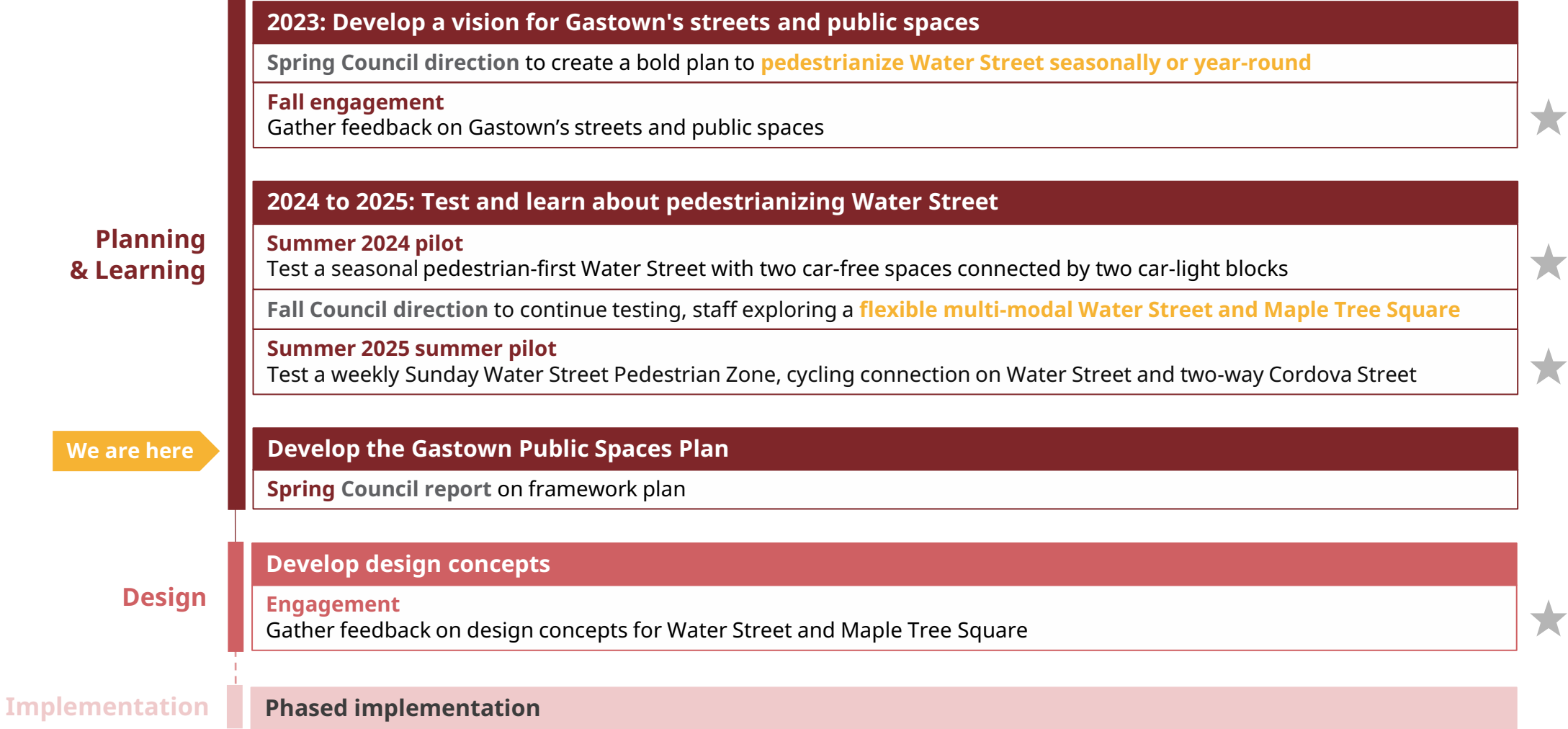
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# Next Steps



# Next steps



★ Engagement Touchpoints