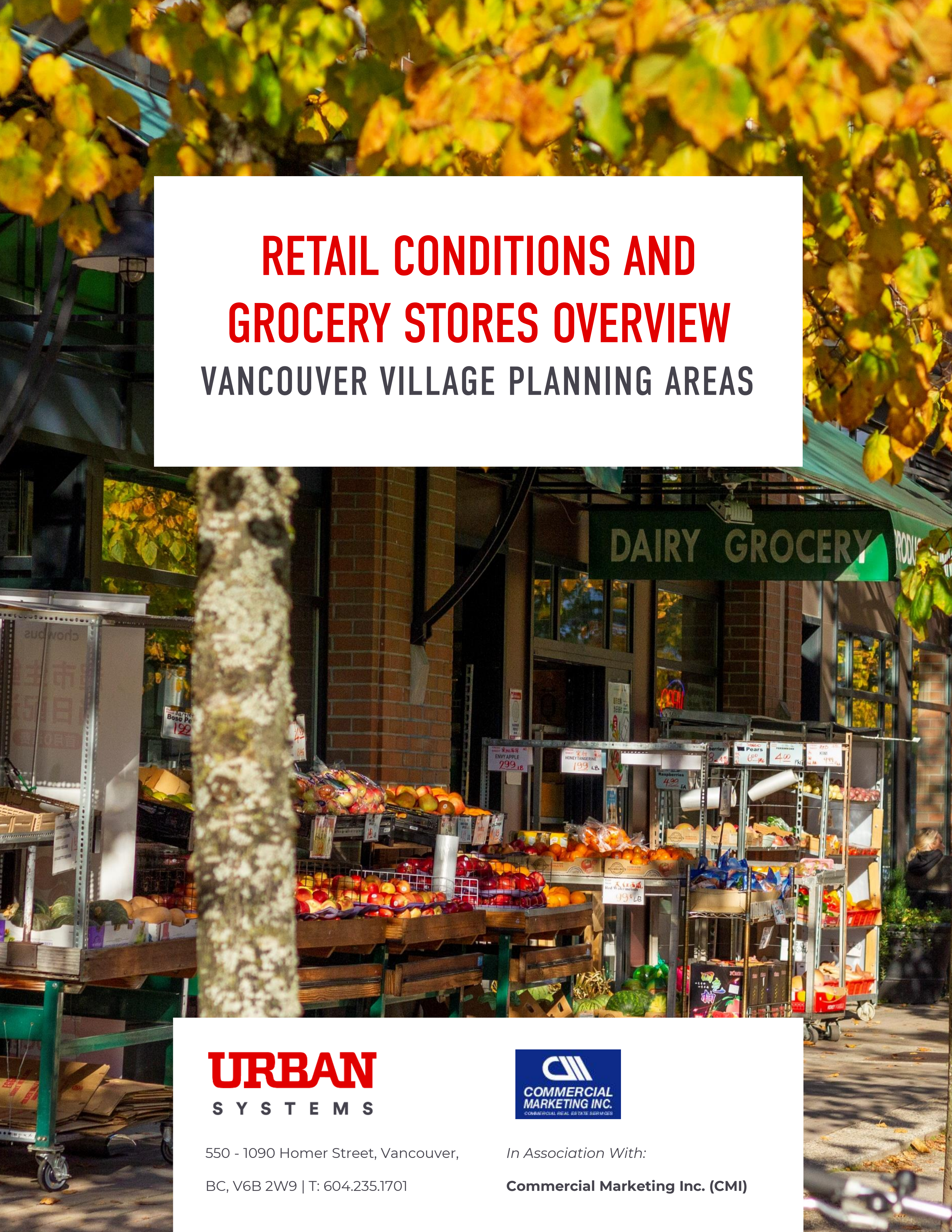
RETAIL CONDITIONS AND GROCERY STORES OVERVIEW

VANCOUVER VILLAGE PLANNING AREAS



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EXECUTIVE SUMMARY

The Vancouver Village Retail Areas Typologies and Categories Report examines existing and potential retail commercial operations within 17 of the City's 25 Villages. The goal of this report is to provide City staff with insights into key considerations for small-scale anchored retail areas to emerge or expand at the local-serving Village scale, with particular focus on retail grocery as a core retail anchor for most Villages. This report provides both commentary on neighbourhood retail dynamics and discussion of the retail grocery sector, along with specific commentary on each of the 17 Villages. The commentary includes discussion of each Village's current (2024) retail mix, nearby competitive retail areas; preliminary assessments of opportunity for retail floor area expansion, and each area's strengths, weaknesses, opportunities and challenges from a retail operations perspective. This commentary will need to be reviewed and revised following completion of population and retail demand forecasts, which fall outside of the scope of this project.

A core goal of the City's Villages planning program framework is the emergence and reinforcement of retail and service commercial nodes within each Village, and the associated ability for local residents to acquire at least basic groceries within a convenient walking distance from their homes. Industry interviews and related research indicate that retail grocery stores can successfully operate at a small scale (sub-5,000 square feet). Local independent and small chain grocers that operate small stores speak of the importance of supplementing the sale of groceries with other products and services that allow businesses to become community hubs, and which allow for a viable and sustainable business model. This includes the ability to offer in-store cafes, outdoor seating, and to sell other goods such as alcohol, homewares, and assorted artisanal products (durable and consumable).

Overall Findings / Recommendations

- Five of the seventeen Villages have retail grocery anchor tenants, ranging in size from approximately 6,000 square feet to nearly 27,000 square feet. The Village at Kerr & East 54th is different from the other 16 Villages in that it is centred around a grocery-anchored community shopping centre[1], with a relatively larger (nearly 27,000 sq.ft.) store. The existing retail grocery store anchors in other Villages are 13,000 square feet or smaller.
- Of the twelve Villages that do not have full-service retail grocery anchor tenants, all but three have some form of either specialty retail grocer, or convenience store.
- Some Villages are better suited to retail grocery stores than others, and provision of retail grocery in some Villages will likely preclude such offerings from emerging in others that are nearby. Examples of such relationships include that between the Macdonald Street Villages at W. 16th vs. W. King Edward, the Nanaimo Street Villages at E. 1st vs. E. Broadway, and the Mackenzie Street Villages at W. 33rd vs. W. 41st.
- Interviews with retail grocery operators and leasing agents suggest that a retail grocery store can be operated at many different sizes. While interviewees operating general grocers indicated 10,000 square feet being a preferred minimum threshold, we also found that more niche or specialty grocers can operate comfortably in footprints as small as 3,000 square feet.

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[1] This Village focuses on Champlain Square, which is an unenclosed community shopping centre of nearly 104,000 square feet with a 27,000 square foot grocery store and supporting tenant mix. Note this Village also has a notable non-retail anchor – an 8,336 square foot public library.

The context of each Village is unique, in terms of existing or nearby grocery offerings. Depending on the type of opportunity that exists, grocery stores (specialty or general) ranging in size from 3,000 to 10,000 square feet are likely appropriate for most Village areas. An exception will be for Villages where substantial population growth may warrant larger grocery stores.

  - The appropriate size of grocery stores or equivalent grocery clusters in each Village will need to be re-visited following completion of population and retail demand forecasts for each Village. At the 3,000 to 10,000 square foot range, the focus will likely be on a combination of local independents and smaller-scale local specialty grocery chains.

- Village-scale grocery stores will likely be most successful when they play more than just the role of selling groceries. Successful emerging models of neighbourhood-scale grocery operations suggest that a 'community hub' focus is a viable and attractive business model, whereby a grocery business is also a gathering place for the neighbourhood. This can be achieved through the combination of grocery offerings geared towards local resident needs / wants, combined with coffee / prepared food areas, limited indoor seating, and outdoor patio space. Many existing operators are already exploring how best to strike the type of balance between offering basic groceries and acting as a more complete hub or gathering place for the neighbourhood. Some believe they have found an optimized relationship between the proportion of their revenues from groceries vs. the sale of other goods vs. in-store café / dining.
- Small-scale grocery operations will by and large require access for loading from the rear of stores, off a laneway. Underground loading is likely to be cost prohibitive from a developer pro forma standpoint in most cases (although this will be determined case by case, based on the density of proposed development).
- Grocery operators typically prefer high-visibility locations (e.g., corners), however interviewees also suggest that mid-block off-arterial locations may be viable (and even preferable) in some instances, if it allows for lower operating costs (i.e., lower basic rent) and ease of multi-modal access, while still providing for visibility from major roadways via signage.
- Grocery operators can underpin the basis for a thriving local retail ecosystem. There are various complementary retail and non-retail business / institutions that grocery operators like to have nearby, and others that are potentially detrimental to their long-term health and vitality. Examples of the former include restaurants, cafes, personal or recreational services, community centres, parks and schools. Examples of the latter include some social institutions and shelters. Location of grocery stores and ancillary retail and service businesses near non-retail anchors can be highly beneficial for the overall success of a retail node.
- Grocery store operators prefer simple square or rectangular floorplans, ceiling heights of 18-20 feet and unit frontage to depth ratios of up to 1:3. While many retailers can and do operate in other configurations, the above is a formula for functional retail space for most tenants. Odd floorplates, poorly placed columns / elevators, sub-18-foot ceilings and narrow / deep commercial spaces are deterrents to attracting retail grocers and complementary tenants.

Highlights by Village Area

Macdonald & West 16th

- Retail mix: The Village has over 65,000 square feet of retail space, including a ~12,000 square foot Choices Market. Additional retail should complement and not compete with this grocery store.
- Opportunities: Keep future retail focused east of Macdonald Street. The first notable area for infill is along the 2700 block of W. 16th Avenue.

- Challenges: East of MacDonald, retail will be focused on the north side of the street which lacks contiguous retail storefronts and is interrupted by a parking lot and residential. No opportunity for 16th Avenue to be a double ended retail street as there is no retail existing or planned on the south side of 16th Avenue east of MacDonald. The south side of 16th Avenue also has a visual obstruction due to the trees and boulevard along West 16th,

Macdonald & West King Edward

- Retail mix: characterized by restaurants and specialty grocery retail, and lacks a larger retail grocery anchor or retail grocery cluster. Retail gravity in this broader area is focused to the north, at W. 16th Avenue.
- Opportunities: potential for retail expansion, particularly specialty grocery offerings, with primary areas of opportunity being the 4,000 and 4,100 blocks of Macdonald Street.
- Challenges: It may be challenging to find other areas for retail footprint expansion, if further expansion is warranted. The Extent of opportunity may be limited by expansion at 16th & Macdonald.

Mackenzie & West 33rd

- Retail mix: includes 4,000 square feet of grocery and specialty grocery.
- Opportunities: Potential for expansion of specialty grocery offerings, building on the current anchor of Windsor Market. The core areas of opportunity are the 4800 and 4900 blocks of Mackenzie. The extent of future expansion need is not yet known.
- Challenges: there is limited physical area for easy floor area expansion along Mackenzie Street. Further expansion along Mackenzie – north or south – will require dedication of site areas for creation of laneway access for loading.

Mackenzie & West 41st

- Retail mix: has some limited personal and professional services today.
- Opportunities: there is likely limited retail expansion opportunity, given challenges of West 41st frontage and the relative proximity to well-served nodes on Dunbar and in Kerrisdale, and the successful node at 33rd and Mackenzie.
- Challenges: equidistant between Dunbar and Kerrisdale, and proximal to 33rd and Mackenzie, which likely limits this node's future retail opportunity.

Granville & West 41st

- Retail mix: heavily service oriented (including automotive service), with limited grocery offered at two convenience stores attached to two gas stations.
- Opportunities: hybrid location, serving neighbourhood and pass-by traffic seeking convenience. Likely potential for expansion of convenience and specialty grocery offerings, with likely future infill opportunities on the southwest, northwest and southeast corners west of 41st.
- Challenges: Beyond the southwest, northwest and southeast corners, it will be challenging to find areas for retail expansion. Off-arterial retail may be possible in this Village if lot assembly and redevelopment is financially viable.

Oak & West 49th

- Retail mix: includes 1,000 square feet of convenience store retail at a gas station. Current mix is destination sporting goods and heavily fast food / restaurant oriented.
- Opportunities: hybrid location, serving neighbourhood and pass-by traffic seeking convenience. Potential for expansion of specialty grocery offerings. Likely future redevelopment / infill sites at northeast and southeast corners (current church properties).

- Challenges: competition from other emerging areas (including Oakridge Transit centre and the redevelopment of the south-west corner of Oak Street and 41st Avenue which is underway) may ultimately limit the extent of growth opportunity at this node.

Angus & West 57th

- Retail mix: area anchored by a small (<10,000 sq.ft.) Choice's supermarket.
- Opportunities: primarily neighbourhood serving node with potential for some limited expansion of grocery offerings. The north side of the 7200 block of W. 57th Ave provides the likely opportunity for additional retail footprint at this node.
- Challenges: There are likely few financially viable redevelopment sites that can lead to further retail development, aside from the north side of West 57th. A single block of retail (both sides of W. 57th) will likely be sufficient to service this node effectively.

Oak & West 67th

- Retail mix: includes a 2,500 square foot convenience store.
- Opportunities: new building with high ceilings on ground floor is being built on the east side of Oak and 67th, offering potential to fill latent retail grocery demand at this node. There may be further opportunities for retail expansion off-arterial, likely along West 67th.
- Challenges: Oak Street's width and high traffic volumes make it difficult to create a comfortable pedestrian environment. Placement of crossings / traffic lights will be critical for shopping area cohesion.

Heather & West 33rd

- Retail mix: no retail grocery offerings today.
- Opportunities: potential for emergence of a grocery-anchored community retail node as part of Heather Lands neighbourhood development.
- Challenges: creating a viable node with good street visibility will be a challenge, until the node has further built out its resident population.

Fraser & East 33rd

- Retail mix: includes a full line No Frills supermarket and a Shoppers Drug Mart at the south end of the existing local shopping precinct which has a variety of tenant categories and extends from 23rd Avenue to 30th Avenues.
- Opportunities: retail on the east side of Fraser street south of E. 31st is not recommended. The main opportunity is to fill out the node along Fraser Street from E.31st to E. 29th, which will then integrate into the Fraser Street retail frontages extending north to E. 24th. There will be benefit to locating near the pharmacy and grocery store for certain categories. Multiple small grocery interviewees see this as a high potential area for new locations.
- Challenges: Cemetery on the west side of the street precludes the emergence of a two-sided retail strip along Fraser Street south of 31st Avenue. Retail lease rates, particularly for new construction are in the $50 per square foot range at present. If asking rents increase to the $60+/sf range, this may be too expensive for local independent specialty grocers.

Knight & East 33rd

- Retail mix: includes 2,000 square feet of specialty grocery and a 3,400 square foot convenience store. Serves neighbourhood and pass-through convenience markets.
- Opportunities: Good view looking north along Knight Street. Non-retail anchor Kensington Community Centre (5175 Dumfries) and Kensington Park located on the south-east corner. Potential for expansion of convenience and specialty grocery offerings, focusing first on expansion west from Knight along E. 33rd Street on the north and south sides of the street.

- Challenges: unappealing street environment along Knight Street due to truck route.

Commercial St. & East 20th

- Retail mix: includes an 11,000 square foot retail grocery store (Famous Foods) at the southern edge of the Village, however this is disconnected from the Commercial Street core of the Village and so does not act as an anchor for this street.
- Opportunities: continued evolution of tenant mix and improvement of public realm along Commercial Street (e.g., wider sidewalks, reduce vehicle speeds and improve pedestrian crossing safety at E. 20th & Commercial St. intersection). Potential new focus at the south end of Commercial Street at E. 22nd across from Selkirk Elementary, for convenience retail expansion.
- Challenges: depending on extent of projected demand, this area may be challenged to find appropriate locations to house future retail uses due to many recently constructed residential buildings along Commercial Street and the presence of many non-retail employment-generating uses in structures of varied ages along the street.

Victoria & E. 61st

- Retail Mix: Includes a 1,700 square foot specialty grocer and 5,000 square feet of convenience retail.
- Opportunities: potential for grocery development given relative distance from competitive nodes
- Challenges: maintaining existing retail grocery through future redevelopment

Wales & East 41st

- Retail mix: very limited current retail mix, focused on professional service offices.
- Opportunities: lack of nearby offerings provide some immediate opportunity for convenience type retail to emerge here. New retail could emerge east or west along E. 41st.
- Challenges: busy street (E. 41st Ave) poses challenge for creating a village precinct environment between the north and south sides of 41st Avenue.

Kerr & East 54th

- Retail mix: unique amongst the 17 Villages, as the Village is centred around a grocery-anchored community shopping centre with over 80,000 square feet of ground-level space and over 100,000 square feet of total space. This centre Includes a nearly 27,000 square foot retail grocery store (Your Independent Grocer), 2,400 square feet of smaller grocery/produce store space, an undersized 3,000 square foot pharmacy (Shoppers Drug Mart), and a sizeable 8,336 square foot non-retail anchor (library).
- Opportunities: this node should remain focused on the shopping centre, and future infill / reconfiguration / remerchandising of the centre.
- Challenges: maintaining business continuity and access through any future re-imagining of the shopping centre.

Nanaimo & East 1st

- Retail mix: well, served by specialty retail grocery and other food retail, along with some destination comparison goods retailers and assortment of restaurant food and beverage.
- Opportunities: likely future expansion opportunity, however challenge will be to ensure that a coherent precinct emerges given recent non-contiguous development with retail frontages along Nanaimo. There is interest in this precinct from small-scale grocery operators.
- Challenges: to avoid seeing retail running continuously along Nanaimo from Charles to Broadway. Retail area will need to have clear edges defined to create unique character.

Nanaimo & East Broadway

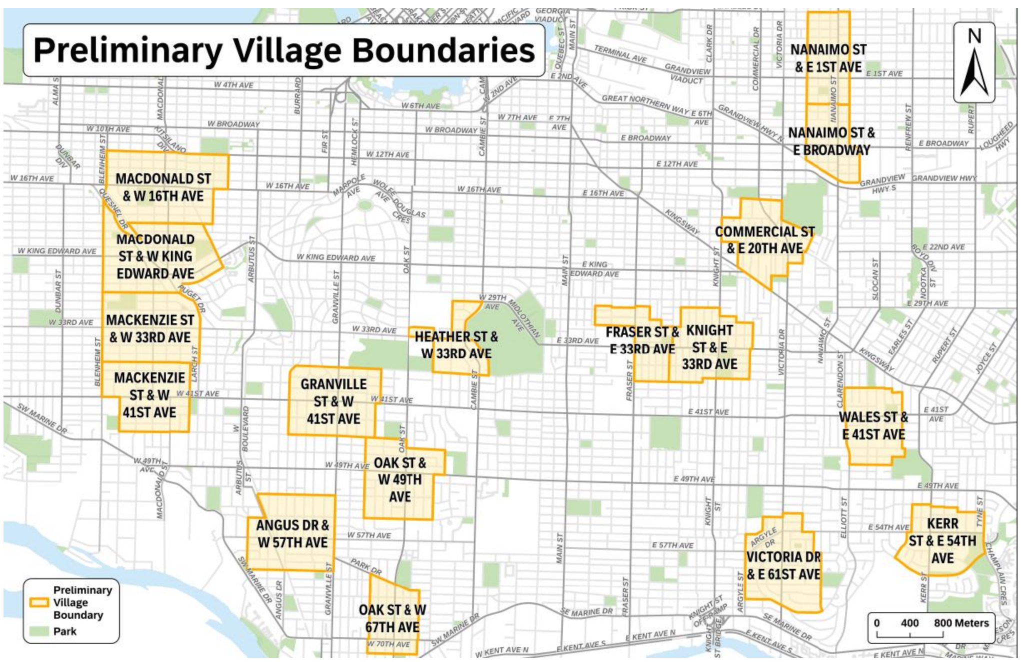
- Retail mix: limited retail grocery in the form of a specialty grocery store and a convenience store. Tenant mix is heavily weighted to restaurant food and beverage and service commercial.
- Opportunities: Expansion opportunity to take advantage of location at two major arterials, however grocery expansion at this node will likely be limited. Major grocery expansion should instead be focused on the Nanaimo & E. 1st node.
- Challenges: location at two major arterials creates challenges for creating a coherent neighbourhood retail node.

1.0 INTRODUCTION

1.1 PROJECT OVERVIEW

Urban Systems (USL), in association with Commercial Marketing Inc. (CMI), has undertaken a preliminary study examining existing and potential retail commercial operations within the City of Vancouver's "Villages" planning areas. This work focuses on providing the City of Vancouver with a broad understanding of some key ingredients for small-scale, anchored retail areas to emerge or expand at the local serving "Village" scale. Some of these ingredients are broad-based, such as overarching principles and practices for retail, and specifically the core anchoring effect that is often played by retail grocery operators (at various scales). These are covered in a general "principles" report section. This is followed by Village-specific discussions, including a review of current retail inventories and proximities, alongside our observations of each Village's defining characteristics. Each Village-area discussion culminates in a Strengths, Weaknesses, Opportunities and Challenges (SWOC) assessment, alongside commentary on potential areas for retail expansion. Note that the latter is offered as preliminary commentary only; more detailed assessment of retail expansion will require both quantitative retail demand / competition projections,[2] and financial analysis to better understand the realities of commercial and mixed-use redevelopment.

Figure 1: Villages Included within Scope of Villages Planning Program



A core component of this report relies in findings from interviews with retail grocery owners / operators, alongside those who are involved in retail leasing. A list of interviewees is provided in the Appendix.

[2] At the time of writing, it was the project team's understanding that the city intends to retail demand projections analysis sometime in 2025.

1.2 BACKGROUND

In July 2022, City of Vancouver Council approved the Vancouver Plan, offering a broad long-range strategy for managing growth and change in the City. The Vancouver Plan identified 25 "Villages" in different areas of the City. The goal is for these Villages to grow over time into "vibrant, lively and connected neighbourhoods…[offering] new opportunities for shops and services, all within a short walk, bike or roll."[3] Current planning efforts are focused on 17 Villages (depicted in Figure 1 above).

To support Village planning efforts, two parallel scopes of work have been undertaken related to Village-scale retail:

1. **Villages Retail Conditions and Grocery Stores Overview** (*this report*) – intended as a current conditions snapshot of each Village's retail landscape, alongside discussion on core considerations for future retail development, given overarching retail principles and best practices and the unique strengths, weaknesses, opportunities and challenges of each Village.
2. **Retail Demand Model – Baseline** (parallel scope) – USL is working with Licker Geospatial (LGeo) to develop a Villages-scale retail model that identifies current retail opportunities and gaps, which creates a foundation for future retail demand forecasting.

A third work scope – likely to be undertaken towards the end of 2025 or early 2026 – will build upon the retail baseline analysis and provide retail projections – (floor area by category) for each Village. Once that scope of work is completed, some of the commentary presented in this report (particularly commentary on Village-specific retail expansion opportunities) will need to be updated and expanded upon.

1.3 REPORT STRUCTURE

This report is structured as follows:

- Section 2 provides an overview and discussion of **retail grocery operational principles** and considerations. Creating preconditions for successful grocery store operations is a key component of the Villages Planning Program. There is a desire to understand how the City might better address food security and incentivize better access to food and daily needs within Village areas. This work is based on a combination of literature review and interviews conducted with retail grocery owners / operators. Details on who was approached for interviews, and status of interview outreach, are provided in Appendix B. This section also includes an overview of smaller retail grocery operators in the City of Vancouver.
- Section 3 provides a discussion of broader **neighbourhood retail trends and principles**, which should be kept in mind when planning for new or expanded retail precincts within the City's Village areas. These principles will impact how retail emerges / expands.
- Section 4 provides detailed profiles of each of the **seventeen (17) Villages** identified by the City of Vancouver. Village profiles include:
  - Data and discussion of retail **mix and vacancy**
  - Data and discussion on retail mix within close **proximity** to each Village

[3] City of Vancouver "Shape Your City" Villages initiative. URL: Villages Planning Program | Shape Your City Vancouver

- Discussion on **area characteristics**, and snapshot of **socio-demographic profile** in relation to City-wide statistics
- Initial discussion around areas for **retail expansion**
- **SWOC analysis** for each Village. Note that this SWOC analysis will need to be updated and expanded upon following completion of Village area population forecasts and associated retail demand projections.

1.4 ASSUMPTIONS AND LIMITING CONDITIONS

- This report has been prepared in the absence of Village-area population forecasts, and Village area projections of retail floor area support and mix opportunity. As such, any commentary related to Village-specific retail opportunities, or the attractiveness of a Village for a retail grocery anchor, is observational and preliminary in nature, and should be reviewed and updated following completion of Village-area population growth and retail demand projections.
- The tenant mix information provided throughout Section 4 (Retail within Villages, and retail within 800 and 1200 metre radii from Village centres) is sourced from either (1) the City of Vancouver's Storefronts Inventory data (2024), or (2) field survey work undertaken by Commercial Marketing Inc. (CMI) (2024).
  - For 11 of the 17 Villages subject to review, the City provided Storefronts Inventory data complete with floor area estimates. This data was current as of March or April 2024.[4]
  - For 6 of 11 Villages, Storefronts inventory data was either incomplete or absent. CMI conducted field surveys in November 2024 to collect data for these Villages; that data was subsequently provided to the City to integrate into the Storefronts inventory. Village areas that were subject to CMI field surveys are listed here:

Heather & West 33rd.	Knight & East 33rd
Mackenzie & W. 41st	Granville & W. 41st
Oak & West 49th	Oak & West 67th

- City of Vancouver Storefronts Inventory data was not checked for floor area accuracy beyond those six Villages where CMI prepared field surveys (noted above). This includes indications of 'vacancy,' where the City has differentiated between "Vacant," and "Vacant – Under Construction." The nature and length of a vacancy can be a useful health and vitality indicator for a retail precinct. This report is unable to comment on the nature of retail vacancies in any detail.
- Anticipated near-term development activity in Village areas is commented on, where data was readily available. Analysis of near and longer-term change in Villages will be considered as part of future phases of work beyond this report.
- Retail tenancies are in constant flux, and some retail categories are more likely to change in a shorter space of time than others. Therefore, some commentary related to "current" tenant mix (Section 4) will be outdated by the time this report is published.

[4] Memo to Council: 2024 Storefront Inventory Update

2.0 RETAIL GROCERY – AN OVERVIEW

A core goal of the City of Vancouver's Villages planning framework is the emergence and / or reinforcement of viable retail and service nodes within Villages. Within these retail nodes, local residents should be able to acquire at least **basic groceries** within an approximately 5-minute walk, roll or bike ride from home. With this goal in mind, the consulting team conduced research on the retail grocery business, through the lens of better understanding if and how small-scale retail grocery stores (or equivalent grocery business clusters) can be supported or encouraged within Villages.

What are "Basic Groceries"?

Basic groceries are defined by the Canada Revenue Agency (CRA) for the purposes of tax exemptions. These include fresh, frozen, canned and vacuum sealed fruits and vegetables, breakfast cereals, bread products, most milk products, fresh meat, poultry and fish, eggs, and coffee beans.

2.1 RETAIL GROCERY AS A NEIGHBOURHOOD ANCHOR

An "anchor" use, or activity generator, is a business or institution that attracts a steady flow of customers to an area.

What is an Anchor?

A **retail anchor** is typically a well-known destination store – or cluster of stores in a retail category – that draws a significant number of customers to a shopping area. Anchors can include general grocery stores, clusters of specialty food stores (e.g., bakery, greengrocer, fishmonger etc.), popular restaurants, or retail stores that serve as a primary attraction for shoppers. The foot traffic drawn to these businesses benefits other surrounding businesses.

A **non-retail anchor** is a facility that generates foot traffic that also may be to the benefit of retail shops and service providers. This can include community centres, schools, libraries and offices.

A grocery store, or cluster of businesses selling grocery items, often acts as an anchor for neighbourhood or community-serving commercial properties or high streets for a number of reasons:

1. **Foot traffic**: grocery shopping is essential for people's daily and weekly routines. By placing a grocery store or cluster of specialty food stores in a retail precinct, it ensures a consistent flow of customers who come to shop for their necessities. This regular foot traffic benefits other businesses in the area.
2. **Visibility**: Presence of a grocery store or grocery cluster can increase the visibility of a retail area overall. People who come for basic or specialty groceries will likely use other stores and services nearby.
3. **Creating a destination**: grocery offerings can make a retail area a destination point for local residents. People may choose to visit the area not just for groceries, but also for other shops, dining, or services such as banks or salons.
4. **Stabilized tenant mix**: grocery stores will typically have long-term leases, providing stability to the retail precinct. This stability can attract other tenants who prefer to be in well-established and consistently busy areas.

5. **Economic impact**: the economic activity generated by a grocery store or grocery cluster can have a positive ripple effect on surrounding businesses. Increased sales and customer visits can lead to higher revenues for all tenants in the area.

The necessity-based nature of grocery shopping drives the stability of grocery-anchored properties / precincts, and the longstanding ability for grocery stores – of all sizes – to serve as an anchor for commercial areas. Unlike other retail categories that are more heavily affected by the shift to e-commerce, grocery stores (or their equivalent) have proven resilient, even during the COVID-19 pandemic. Grocery stores are a staple of daily life, and their stability in the retail landscape is largely due to the essential nature of the products they provide.

On average, Canadians made 7.2 trips to the grocery store per month in 2023 (up from 5.43 in 2018). A recent survey by Canada's Competition Bureau found that 81% of Canadians buy groceries at least once a week, with 44% shopping weekly and 37% making two to three trips per week.[5] This regularity underscores the central role of grocery shopping in people's lives.

2.2 CURRENT AND EMERGING GROCERY BUSINESS TRENDS

2.2.1 CONCENTRATION OF POWER

Retail grocery products can be offered in a wide variety of store types. In Canada, the retail grocery landscape is dominated by a few larger supermarket players – Loblaws, Sobeys, Metro, Walmart, Pattison and Costco. Amazon also plays a role, with their acquisition of Whole Foods. These organizations account for over 76% of total grocery sales across the country. Amongst major retail chains, the general trend over the past 20 years has been increasing store sizes. New full-service supermarkets operated by the national chains are now rarely smaller than 35,000 square feet, with most major brands preferring 40,000+ square feet.

At the same time, there are instances of some major brands launching smaller stores in dense urban markets, Loblaws, for example, has recently launched an initiative to roll out 40 stores under their "No Frills" banner at about 15,000 square feet each. These stores are intended to cater to "cost conscious" consumers, with a focus on Loblaws brands (Presidents' Choice). Smaller footprints will give Loblaws more flexibility in site selection. Similarly, Metro has indicating that they are exploring smaller-footprint convenience-oriented grocery stores in denser urban markets.

[5] See Statistics Canada: Retail Grocery Market Study

Table 1: Examples of Major Grocery Chains, Brands and Store Sizes

Parent Organization	Major Brands*	Typical Floor Areas (sf)
Loblaws	Superstore; City Market; Your Independent Grocer; Freshmart; T&T; No Frills; Shoppers Drug Mart	120,000+ (Superstore) 40,000-45,000 (City Market) 35,000-75,000 (T&T) 16,000-18,000 (Shoppers) 15,000 sf (new No Frills stores)
Sobeys	Sobeys, Safeway, Thrifty Foods, Fresh Co, Foodland	35,000+
Metro	Metro, Metro Plus, Food Basics	10,000 – 75,000+
Pattison Food Group	Nesters, Choices, Meinhardt, Buy-Low, Urban Fare, Nature's Fare, Quality Foods, Price Smart, Save-On-Foods	35,000+ (Save-On-Foods) 6,000-20,000 (Choices) 25,000 (Urban Fare) <15,000 (Nesters) <10,000 (Natures Fare)
Walmart	Walmart, Walmart Supercentre	120,000+
Amazon	Whole Foods	40,000+ sf

**excludes some store brands operated by parent organization outside of BC*

The remaining <24% of grocery sales are represented by smaller regional chains and independent grocers, plus small food stores, specialty stores, convenience stores, and businesses selling grocery items as ancillary to their primary business.

According to the Canadian Federation of Independent Grocers, there are around 6,900 independent grocery stores across Canada. These smaller players compete by focusing on specialized, local offerings. They often have specific locations, footprints, and store formats with specialized product ranges, pricing, and services. In the City of Vancouver, Storefronts inventory data indicates that there are over 120 independent grocery stores and supermarkets currently operating across the City.

2.2.2 SMALL GROCERS AND GROWTH OPPORTUNITIES

While larger grocery chains dominate the Canadian market, smaller retailers (independents and local chains) are finding success by offering unique products and services and creating more intimate community-focused experiences. Research has found that independent grocers compete with chains by being highly personalized, customizing their inventories to fit the grocery-shopping habits/preferences of local communities. This often (but not always) entails being a thematically focused **specialty food store** that focuses on selling specific types of food or cultural foods, while also offering unique products and services that are tailored to local wants.

Independent grocers (or independent businesses that also sell groceries) are often more focused on sourcing and being distribution points for **local producers** of all types – produce, meat, dairy, dry goods, and durable goods. Recent research has indicated that 84% of British Columbians say that buying local is at least somewhat important to them in their grocery shopping. However, at the same time what is called the "local food paradox" may come into play. This paradox points to the willingness of Canadians to support local, but the reality that they also have bills to pay and that once they walk into a grocery store, price itself becomes the critical factor when it comes to making a decision.

Inflation and Shifting Consumer Habits

Rising food prices have led many shoppers to seek out cost-savings, such as buying in bulk, opting for private-label products, or exploring alternative shopping channels. In response, many grocers have expanded private-label goods (e.g. President's Choice, Western Family, Compliments) to offer affordable alternatives. Sales of private label goods represented 19% of total grocery revenue in 2023, a 5% increase from the previous year. Retailers are also diversifying product offerings to cater to growing demand for healthier, more environmentally conscious products.

6 in 10 consumers seek out discounts and promotions when shopping for groceries, according to research from Dalhousie's Agri-Food Analytics Lab (2024).

These trends are evidenced by Loblaws' recent decision to launch smaller-scale "No Frills" stores, focusing on their private-label brand and offering lower-cost options.

2.2.3 E-COMMERCE

The impact of e-commerce on grocery shopping has been steadily increasing, although it remains a smaller share of the overall grocery market compared to other sectors. Online grocery shopping in Canada accounts for around 9% of grocery purchases, with consumers increasingly opting for home delivery, curbside pickup, or in-store collection. More consumers are looking for greater convenience, and delivery models are becoming more sophisticated. Major retailers like Walmart are integrating features such as shopping lists, product suggestions, and flexible delivery options to enhance the online shopping experience. The most popular and widespread grocery delivery services in Canada are Instacart, Loblaw's PC Express, Sobey's Voila, Amazon and Buggy.

Canadian food retailers are approaching online order fulfillment in two main ways: store-based and warehouse-based models. Store-based fulfillment leverages existing store inventories and labour, making it easier for retailers to offer services like click-and-collect. Loblaw and Metro, for example, have invested in micro-fulfillment centers and hub stores to meet growing online demand. Warehouse-based fulfillment, on the other hand, relies on high-capital investments in automated systems and centralized distribution centers to handle large-scale online orders (e.g., Amazon). Both models present challenges in terms of infrastructure and staffing but are essential for grocers to remain competitive in the growing digital marketplace.

Grocery retailers are increasingly partnering with third-party delivery platforms like Instacart, Uber Eats, and DoorDash to expand their delivery capabilities. These collaborations allow grocers to offer more flexible delivery options without having to invest heavily in in-house infrastructure. Some grocery retailers run in-house delivery services (e.g., Save-On Foods, Stong's Market).

2.3 SMALL GROCERS IN CITY OF VANCOUVER

This section provides a brief snapshot of some of the planning and related considerations that affect the successful siting and operations of smaller-scale grocery stores.

2.3.1 CURRENT EXAMPLES

The City of Vancouver has many examples of smaller scale markets and grocers, the majority of which are independents. While some chains are operating at smaller scales (e.g., Pattison Groups' Choices brand, and Loblaws No Frills brand), the table below serves to underscore the significant role that local independents play in smaller-scale grocery operations in the City. Local independents (or small-scale local chains) are, in our opinion, the likely target for most future Village scale grocery operations.

Table 2: Examples of Retail Grocery Stores in Vancouver <20,000 square feet

Store Name	# of Locations*	Floor Area (sf)
Stong's Market	3	2,500, 20,000, 22,000 sf
Famous Foods	1	10,200
Vancouver Freshmart	1	14,826
Donald's Market	1	12,000
City Avenue Market (Donald's Market)	4	~8,000
City Avenue Market (other)	4	~3,000
Federal Store (10^{th} & Quebec)	1	~1,500
Be Fresh Local Market	1	2,600
Union Food Market	1	1,640
Wilder Snail Grocery	1	n/a
Stadium Market	1	2,400
The Local Farm Market	1	n/a
Green's Market	1	12,000
88 Supermarket	3	8,000
Organic Acres Market	1	1,950
Sakuraya Japanese Supermarket	1	n/a
La Win Supermarket	1	9,800
Lena Market	1	5,300
Polo Market	1	1,000
Polo Farmers Market	2	3,500
Parthenon	1	4,848
Top Ten Produce	1	3,600
Afra On Main	2	2,100
Triple A Market	3	3,500
Punjab Food Centre	1	2,900
Persia Foods Ethnic Markets	1	2,900
Banana Grove Market	1	4,280
Chong Lee Market	2	5,550, 13,500
Osoyoos Produce	1	4,200
Aria Market	1	n/a
New Apple Market	1	2,000
Fruiticana	3	~6,500
Sunrise Market	1	7,342
Jasmine Mediterranean Foods	1	2,244
East West Market	2	2,700, 4,800
Tama Organic Life	1	n/a
Garden Fresh Grocery	1	4,700
Teng's Market	1	4,500
Consumers Produce	1	2,700
West Side Market	1	1,160
Average Size		**5,600**
Median Size		**4,200**

*may include locations outside City of Vancouver

2.3.2 COMMON CHALLENGES

There are many challenges to the economically viable operation of small-scale neighbourhood retailers, and particularly those focused on the sale of groceries. The following points are based on information gathered through targeted interviews conducted specifically for this study, as well as information gathered previously in preparation of the *Retail-Commercial District Small Business Study* in 2019/2020 plus input gathered informally during the course of CMI's day-to-day commercial brokerage-related business.

- **Rent, Operating Costs and Property Taxes:** retailers of all types, including local independent retail grocery operators, are increasingly challenged by rising basic and additional rent plus rising labour costs. Many have stated that these rising costs cannot be fully offset by passing all costs along to the end-buyer / consumer. Some small-scale grocers interviewed for this project have managed to establish robust local supply chains that allow them to be price competitive with larger chain stores, and achieve reasonable margins. Others have had less success in this regard, and note that they struggle to maintain even a small margin on their business operations.
- **Competition**: for basic grocery items, larger-format or national chain stores will, in most cases, be able to offer these items at lower prices. As noted above, some small-scall grocers have been able to find ways to maintain price competitiveness, while others will sell basic groceries at a loss to ensure they get customers through the door.
- **Business interruption**: business continuity / sales can be interrupted due to proximity to development, construction etc. Many small grocers cannot weather these types of disruptions due to tight margins and high operating costs. Major construction can therefore lead to business closures / relocations.
- **Non-complementary businesses or services:** proximity to some business types or services can lead to significant loss of sales and ultimately disrupt viable operations.
- **Staffing:** many of the historic independent corner stores that once dotted the City of Vancouver's landscape[6] were viable due to families working long hours to keep staff costs down. This remains the case in many small independent grocery stores today. Staffing costs can be a challenge, and some interviewees noted the importance of getting the balance right between in-store uses to avoid outsized staffing costs (e.g., grocery sales vs. coffee bar).
- **Permitting:** while there have been improvements in recent years, various aspects of City permitting remain a challenge for establishing and operating new commercial businesses, operations according to interviewees. These challenges include permit process complexity, time to have permits issued, and costs of the permitting process (both direct, and indirect tied to timing). Many businesses have spoken of the need for a 'case management' approach to permitting and licensing, where there is a single point of contact for multiple issues. Multiple interviewees raised the issue of patio permits specifically, noting that the ability to offer sizeable outdoor patios can be a key 'edge' for small scale / independent grocers that are also trying to be neighbourhood hubs, which in turn helps to attract customers and sell groceries. The main issue with patio permits specifically were around cost and process.
- **Start-up costs:** the time, cost (dollars spent and revenues foregone) and expertise required to open a business have been cited by interviewees as a major hurdle. Related to permitting, the

[6] City of Vancouver data suggests that there are 96 deactivated neighbourhood commercial nodes across the City.

need to pay rent during permitting can lead to cases where permitting process itself leads to applicants being financially unable to open the business, or find themselves in a situation where they no longer have the financial buffer to weather the business startup phase.

- **Allowable / Flexible uses**: successful and resilient small-scale grocery stores are often more than just grocery stores; they have other lines of business that complement their retail grocery offerings, both driving traffic to the stores, and providing higher margins to offset sometimes zero or negative margin basic groceries. Higher margin activities that allow retailers to sell groceries include sale of prepared foods, sale of durable goods, sale of alcohol, operating a restaurant / café, and catering operations within the premises. Interviewees also noted the need to be flexible to allow for business experimentation, such as different mixes of uses or co-location of uses (e.g., on-site food manufacturing + sales + service). They note the need to ensure that zoning and building code requirements are not hindering this flexibility.
- **Building upgrades / change of use**: when looking to locate uses in existing older structures, protocol around change in approved land use and / or building occupancy class can be barriers. This is not specific to retail grocery, but could impede the ability for a grocery operator to come into a vacated space.
- **Parking:** the competitive edge of the smaller format local grocer is to provide convenience with easy access / egress. Parking challenges and the extent to which parking is a major consideration, will vary significantly by location and the nature of future Village population growth. Some interviewees were adamant of the need for easy parking for customers, while others downplayed the issue. It is entirely dependent on neighbourhood and expectations of the customer base.

2.3.3 LOCATION AND OPERATIONAL CONSIDERATIONS

Need for Operational Flexibility

Existing and emerging commercial – grocery or otherwise – must be allowed to build upon and support the unique characteristics of each neighbourhood and Village. Those characteristics and needs are likely to evolve as the nature of the customer changes, and businesses must be allowed to evolve with them.

Case Study of Flexible Business Model:
Be Fresh Market and Organic Acres Market

- Began as SPUD, which delivered fresh organic produce and meals to homes. In doing so, they developed robust supply chains with local vendors in each of their markets, including ranchers, farmers, fishers, bakers and artisans.
- Business evolved to open small-scale bricks and mortar locations, in which they offer prepared foods, in-store seating / café, alongside local groceries and produce. The bricks-and-mortar locations act as a community hub but is also form part of a broader logistics network for delivery of locally sourced organic foods.
- Be Fresh includes a coffee bar and kitchen, however their model is primarily oriented towards well-priced, locally sourced organic groceries. In-store coffee + meals accounts for <20% of in-store revenues, which they identify as the "sweet spot". Coffee / prepared foods can be higher margin products and also foot traffic generators, but pushing beyond this ratio leads to outsized labour costs.
- The stores operate in floor plates between 1,950 and 2,500 square feet. They indicate that the sub-2,000 sq. ft model is likely too small, and would prefer operating closer to 3,000 square feet.
- In-store offerings and uses are customized to meet the demands of the local customer base.
    - They identify outdoor patio seating as key to their acting as a community hub.

- Successful small-scale retail grocery stores are increasingly focused on creating a **unique local experience (with associated unique mix of goods and services)**, which will be different in each neighbourhood, catering to each area's customer base.
- New commercial offerings in general (and grocery in particular) should aim to **complement rather than compete** with existing commercial / nearby retail grocery, either within the Village or in close proximity to the Village. Understanding the competitive landscape is key, and the City of Vancouver's Storefronts data is valuable in allowing landlords, leasing agents, and business owners / operators to gain a clear picture of the competitive landscape.
- The sale of retail grocery items may, in some cases, be ancillary to the creation of a neighbourhood hub experience. In other words, the sale of retail groceries (dairy, meat, produce etc.) may not be the primary driver of a business' success (although that will vary case by case, area by area), nor may it account for the majority of floor area. The nature of the experience (and types of goods offered) can and will evolve over time as the customer base changes. Different businesses will have different models, and policy needs to be permissive enough that businesses can pivot.

Case study of Flexible Neighbourhood Hub with retail grocery offering:
The Flourist on Commercial Street & E. 20th Ave

The Flourist on Commercial Street, just south of the Victoria Drive Diversion (near the Croatian Cultural Centre) offers some basic (artisanal) groceries to the neighbourhood within the context of a business that does multiple things and has emerged as a unique (and very busy) neighbourhood hub. The business offers a combination of everyday and specialty flours prepared on-site (i.e., manufacturing use), a full-line on-site bakery (breads, pastries etc.), a specialty coffee bar, local beer and wine on tap, locally produced artisanal goods (e.g., cookware), small selections of local produce, grocery and dairy items, and a small selection of wine and beer for off-site sale. They also offer a limited menu of soups, sandwiches and other similar items that make the business a destination lunch spot for local residents and those who work at nearby businesses. There is an abundance of both indoor and outdoor seating,

This type of multi-use, multi-function business serves as a model for a successful community hub, that also serves the need for some local basic groceries. Due to the array of complementary business functions, the business can generate sufficient profit margin to operate successfully, and has created a unique business suitable to the local need.

Grocery Store Sizes

- General Trend: Anchor general grocery stores / supermarkets are increasing in size, with minimum sizes for large chain supermarkets of 35,000 square feet.
- Smaller-Stores: There are some national brands such as No Frills experimenting with smaller floor plates (~15,000 square feet). However, generally, many of the brands that formerly operated in sub-10,000 square feet are now seeking larger footprints (e.g., Choices Market).
- Generally, it is the independent specialty or general grocers, or hybrid specialty operators (like Be Fresh / Organic Acres) that are operating in smaller (sub-10,000 square foot) floorplates.

These are likely to be the main focus for the emergence of grocery stores (or limited grocery offerings) in some Village areas.[7]

- While there is no “correct” retail floor plate size for a small-scale grocery store, typical general grocers are seeking a minimum of 10,000 square feet while specialty grocers may operate in much smaller floorplates (as small as 3,000 square feet). The latter can serve various market niches depending on the needs / demands of specific locations, while also offering basic general grocery items.
- There are successful grocery examples operating in 3,000 square feet or less, such as the new Stong’s Market small store concept in Downtown Squamish, Be Fresh and Organic Acres, East West Market, and others as noted in Table 2 above.
- Operators will configure their offerings in each store based on the local market demand and competitive climate. There is no rule for what is “in’ or “out” at different size thresholds. This underscores the need for policy flexibility, allowing businesses to customize (and re-customize) their focus to meet the local needs and remain competitive over time.

Case study of Small-Scale Grocery Operations

Stong’s Market

Stong’s Market has been in continuous operations in Vancouver for over 100 years. At times it has operated as a small-scale regional chain, while during other periods it operated a single store on Dunbar Street. Over the past decade it has operated two full-service grocery stores, one on Dunbar (20,000 square feet) and one in North Vancouver (22,000 square feet).

In March of 2024, Stong’s opened a new concept in a former café space on Cleveland Avenue in Downtown Squamish. The store occupies only 2,600 square feet, making it smaller than most convenience stores. The store focuses on prepared to-go hot meals, fresh produce, limited dry goods, alongside a section for flowers, giftware and cards.

Floorplate Configuration

In general, most grocery store operators prefer to operate in a floor plate that is configured as a simple rectangle or a square. They can also operate in a L-shaped environment, provided that the majority of their space is located within the rectangular portion of the floorplate. Odd layouts such as U-shapes or irregular shapes are not desirable, and odd space configurations can be an impediment to attracting a grocery tenant. Grocery operators will also avoid spaces with significant visibility or people flow impediments such as poorly located columns or elevator shafts. In a high opportunity growing market area where space options are limited, retail grocers will operate in sub-optimal space configurations. However, effort should be made to deliver spaces that are appealing to grocery operations if / where such uses are prioritized.

[7] The extent of support for retail grocery in Villages, and the types of operators that may emerge, is a question that will need to be re-visited following completion of Village area population forecasts and associated retail floor area demand projections.

Ceiling Heights

Most retail uses require ceiling heights greater than typical residential uses to accommodate visual displays, lighting and mechanical requirements. For retail grocery stores, and generally any retail user looking for space >2,000 square feet, a ceiling height of 18 to 20-feet from slab to slab is appropriate. This allows for mechanical requirements and a serviceable mezzanine to be properly integrated into the ceiling space. Spaces that are created with sub-18-foot ceilings will struggle to attract retail grocery stores.

Shipping, Receiving and Loading

Grocery stores will often prefer loading from the rear laneway to minimize disruption to customer access and to maintain a clean and clear storefront. This can also to help mitigate issues around traffic movement (cars and bicycles). Underground loading can be effective in higher density mixed-use situations (and help to reduce laneway congestion and noise), however the costs of creating underground loading areas are often prohibitive for developers, who cannot necessarily recoup those costs through higher commercial rents or upper-level apartment rent or sales prices.

Loading, even for smaller grocery stores, will typically be accommodated by 55-foot trailers, although some interviewees suggested that they can operate with 35-foot trailer capacity.

Parking

For larger stores, parking of 3 parking stalls per 1,000 square feet is an accepted industry norm. Appropriate parking setups will vary area to area, and will depend on the volume of clientele that arrive by foot or bike.

Location / Visibility Requirements

For both larger stores and smaller stores placement on a busy street where the store benefits from high visibility from car and foot traffic can be important Most grocery stores ideally would like to be located near busy intersections or near public transportation hubs. However, some grocery operators have noted that they would seek out locations slightly off major arterial roads if available, provided that the lease rates were slightly lower and that they could still maintain some degree of visibility from the arterials.

Complementary Businesses

Interviewees were asked what types of businesses they would ideally like to co-locate or cluster with, for maximum effect. They were also asked what types of businesses they would like to avoid.

Most grocery operators indicated desire to have these types of uses nearby:

- Specialty foods (bakeries, fish shops, delis, meat shops etc.)
- Cafes
- Unique restaurants
- Local retail boutiques
- Fitness / yoga studios
- Community centres
- Pet food stores
- Offices and schools

Grocery operators also commented on uses that they did not want to have nearby. Most of their comments related to negative impacts on customer safety and perception of safety.

- Competing grocery stores
- Shelters
- Safe injection sites

Case study of Nearby Negative Impact – FreshMart (1st & Commercial)

In an interview conducted in late 2024, the owner of FreshMart outlined the significant negative outcomes for his business of proximity to a 40-bed shelter. During the period where that shelter was open, the store experienced significant loss of revenue (~$6,000 per week compared to same period in prior years), and there were multiple incidents of customers being physically confronted. In one instance, a customer was followed home and physically assaulted. The loss of revenue was a function of both a drop in customer foot traffic (due to safety concerns), and frequent theft of high margin items such as specialty cheeses and meat. In addition to loss of revenue, additional costs were borne through increased on-site private security.

Since closure of the shelter, there has been an uptick in business, and positive feedback from customers.

Lease Rates

Lease rates vary by location, unit size and use. Typically, lease rates will be higher in areas with higher property values, however there are many market nuances that can cause lease rates to fluctuate within areas, even in close proximity to one another. Every business has a different ability to pay rent; each business has a target rent-to-sales ratio that allows them to be economically viable. Achievable rent-to-sales ratios can vary significantly by retail category due to differences in profit margins, sales volumes, and operational costs. Grocery stores will typically have lower profit margins than most other businesses, and will aim for rent-to-sales ratios of around 2% to 5%.

- Small grocery stores (<2,000 square feet) with some non-grocery offerings (e.g., coffee bar) can typically be viable while paying up to $60 per square foot in basic rent (as of 2025). These stores will offer essential groceries and may include small deli, and coffee bar.
- Medium grocery stores (2,000 – 5,000 square feet) can be viable while paying $35-$55 per square foot in basic rent. These stores will offer a wider array of products including more bakery and larger deli and prepared foods sections.
- Larger grocery stores (>5,000 square feet) would be able to pay $30-$50 per square foot in basic rent.

2.3.4 LEASING CONSIDERATIONS

Leveraging and Communicating Storefronts Data

The City of Vancouver Storefronts inventory data is valuable information for property owners, leasing agents and businesses doing site selection, as it can allow for informed decision making and proactive informed tenant recruitment. In conversations with leasing agents, it appears that the leasing / brokerage industry in Vancouver is still not broadly aware of the existence of this data, or how it can be effectively leveraged to support thoughtful, proactive tenant recruitment. The City should make proactive efforts to make all major brokerages aware of this data, and actively encourage its use in building out Village area retail footprints.

Proactive and Strategic Tenant Retention and Recruitment

Tenant retention and expansion should be the first priority in any retail precinct with a viable existing tenant mix, before focusing on attracting new tenants. Understanding the criteria which are important for the retention of existing neighbourhood retail grocers, and / or expansion of businesses to offer basic retail grocery goods, will be critical to long-term viability of these businesses.

Critical elements of proactive tenant retention include:

- Frequent check-ins with business owners and property owners in any given area that is deemed a priority, to identify critical issues for business health and vitality, ad how that health / vitality may be changing.
- Active tracking of changes to the competitive retail landscape – which the City is now doing through the annual Storefronts Inventory. Reiterating the point made above, Storefronts data and reporting needs to be actively pushed out to brokerages, including information on how brokers can use this information to better serve their clients.
- Communication to businesses, and particularly anchor businesses, about local area progress and opportunities, including projected changes to the local market and ways to adapt/

Property owners need to be on-side and supportive of proactive and targeted leasing based on a nuanced understanding of a shopping area's immediate client base, projected growth, and projected retail opportunities. In the context of a street retail environment (versus a dedicated commercial property like a mall), proactive leasing requires a fragmented group of property owners to be aligned and engaged, working with leasing agents to do the following:

- Buy into a compelling vision for an area around merchandising and positioning.
- Tracking the growth and change of the trade area, and associated customer needs / desires (e.g., culturally specific foods and other offerings)
- Understanding complementary business types
- Engaging proactive leasing agents to target desired tenants / tenant categories
- Matching leasing opportunities with retail categories (considering the varied ability of different business types to carry lease payments)
- Keep buildings well maintained.

3.0 NEIGHBOURHOOD RETAIL TRENDS AND PRINCIPLES

The section above has outlined some considerations for retail grocery operations in Villages, including potential for grocery sales within businesses where the primary function is not retail grocery. This section speaks to the principles for successful retail precincts more broadly, focusing on what makes for a successful retail node or street. Not all principles will apply to all Villages, as their individual contexts are unique.

3.1 OVERVIEW

Across the City of Vancouver, we see a range of retail areas and typologies providing goods and services that both support the local neighbourhoods and also attract considerable regional destination shoppers. The composition of the neighbourhood-serving retail areas within "Villages" across the City varies quite significantly, with some offering robust, well-anchored convenience-oriented retail and services to local residents, while others offer limited – or in some cases no – retail goods and / or services today. Detailed tenant mixes and associated commentary for each of the 17 Villages is provided in Section 4 of this report. While the nature and dynamics of each Village are different, the City's planning goals are for each Village area to contain a mix of 'missing middle' housing and offer local-serving retail and services.

There are a number of trends and principles to keep in mind when considering setting land use and related policy for commercial development. It is also important to keep in mind overarching economic context. Even prior to the onset of COVID-19, retailers in many areas of the City were reportedly struggling due to issues with space affordability (amongst other issues). As was shown in the *Retail-Commercial District Small Business Study (2020)*[8], many businesses in Vancouver were raising consistent and common concerns around competition, land speculation, and the impacts of property assessment based on highest-and-best-use in areas with significant redevelopment potential due to new area plans. Further, as older commercial properties are redeveloped into new mixed-use projects, the pro forma rents required for that new space, or conditions from commercial lenders, may be a barrier for independent businesses to occupy the new spaces. All of this is happening in an environment where a critical lack of housing supply and associated declining affordability are causing businesses to struggle with attracting and retaining staff. The rise of major online retailers has also had impacts across a wide range of categories, shifting demand from bricks-and-mortar retail locations into industrial areas focused on warehousing and distribution. This is also increasing the need for smaller warehouse / logistics facilities at inner-city locations to facilitate the steadily increasing demand for same-day goods delivery.

The combined impacts of high rents, high housing prices and online competition create challenges for small and large businesses alike. Many have to close or find locations outside of the City to operate. Within this context, the desire for small-scale neighbourhood retail remains, and in some cases, has

[8] See: https://vancouver.ca/files/cov/city-of-vancouver-small-business-study-2020.pdf

grown. Neighbourhood grocery stores, along with other small-scale neighbourhood-serving retail continue to play an important role in enabling residents to access daily and weekly needs.[9] [10]

3.2 DESIGN AND PLANNING PRINCIPLES

Following is a discussion of several retail and retail related design and planning principles that are important to consider when planning for the future of the varied retail nodes and corridors – both existing and not – across the Village areas. This is not intended as a comprehensive, all-encompassing playbook or formula with all the ingredients for retail success. Rather, these are some of the more important elements that should be kept top of mind when considering how retail may function at the neighbourhood scale, on or off major streets.

3.2.1 ADEQUATE POPULATION DENSITY

The extent of linear frontage (and retail selling area) that can be designated for commercial floor area is, at least within the context of neighbourhood and community-serving retail areas, directly proportional to the density of the neighbourhood population. This population includes residents as well as daytime workers, which both generate retail and service demand, but do so in different proportions and at different times of day. The combined density metric of “people + jobs per hectare” that is sometimes used for planning purposes is instructive, but the extent of one vs. the other (residents or workers) will shape the extent and types of retail that is supportable.

There are some broad rules of thumb that can be used as a starting point in a conversation about approximate extent of opportunity for neighbourhood or community-serving retail space, based on different local catchment area population density levels. The figures presented in the table below are general, and hinge on a number of broad assumptions which may not hold equally well in all areas.[11] However, we believe this table is a useful tool nonetheless, serving as a starting point for illustrating the relationship between density and the extent of street frontage that could realistically be ‘activated’ with retail commercial, within a neighbourhood or community-serving context.

[9] See: Vancouver close to achieving '15-minute city' status, SFU study finds | CBC News
[10] See: “Retail Health and Vitality and the Prospects of 15-minute Neighbourhoods in the City of Vancouver”, at: https://lai.org/wp-content/uploads/2025/03/retail_health_and_vitality_and_the_prospects_of_15-minute_neighbourhoods_in_the_city_of_vancouver_report_v2.pdf

[11] For example, block length and lot depth vary area to area, and in Vancouver, block lengths are quite different for north-south vs. east-west blocks. The extent of potential dollar capture can also vary depending not only on the neighbourhood population density, but by the distribution of competitive retail nodes. More competition may translate to lower ‘capture rates’ for retail dollars in any one location, while less competition may mean a higher proportion of local dollars are captured locally. Also, retail performance (sales per square foot) varies by business category. If a business requires a higher $/sq.ft. sales threshold, then the floor area supportable will be lower.

Table 3: Illustrative Relationship between Population Density and Commercial Corridor Length

Population Density (per gross hectare)	Population within 400m catchment area (approx. 50 HA or 124 AC)	Approx. floor area (square feet) of neighbourhood/ community retail support[12]	Approx. Number of 'active' blocks (double-loaded)[13]
50 people per HA	2,500	24,000 to 30,000	1
75 people per HA	3,750	29,000 to 45,000	1.5 to 2.0
100 people per HA	5,000	40,000 to 60,000	2.0 to 2.5
125 people per HA	6,250	60,000 to 75,000	2.5 to 3.0
150 people per HA	7,500	72,000 to 90,000	3.0 to 4.0
175 people per HA	8,750	84,000 to 105,000	3.5 to 4.5
200 people per HA	10,000	95,000 to 120,000	4.0 to 5.0
225 people per HA	11,250	107,000 to 135,000	4.5 to 6.0
250 people per HA	12,500	120,000 to 150,000	5.0 to 6.5
275 people per HA	13,750	130,000 to 165,000	5.5 to 7.0
300 people per HA	15,000	145,000 to 180,000	6.0 to 8.0
500 people per HA	25,000	240,000 to 300,000	10 to 13

[12] Assumes 35-45% of gross retail and service commercial household expenditure potential is captured locally, and an average retail performance (i.e., sales) requirement of a blended $600 per sq.ft. per annum (i.e., same $/sq.ft. performance applied globally, without variation by category). Retail floor area support is calculated by dividing net expenditure potential (gross spend x local capture) by retail performance. So, if net expenditure potential is $10m and performance required is $600/sq.ft., then the floor area support is 16,667 sq.ft.

[13] Assumes average block length of 300 feet, average unit depth of 60 feet, with 60% active frontage per block and a 75% ground floor building coverage ratio. These are reasonable but broad assumptions that serve as a starting point for analysis, but which require refinement based on area-specific considerations such as parcel configuration.

Table 3 above shows the approximate relationship between neighbourhood population density, the number of implied residents within an immediate catchment area of a retail street (400 metres), and the extent of retail floor area that may be supportable. There are three important caveats to keep in mind when reading this table:

1. The relationship between catchment area population and floor area support applies to neighbourhood / community serving retail areas only. If an area is attracting more destination retail spending from beyond the neighbourhood, then the extent of supportable floor area may be higher even if the local population remains the same.

-

2. A larger catchment area would support more floor area at a given population density threshold. The table above assumes that a retail precinct is primarily serving the immediate Village area (400m catchment), which implicitly assumes that there is an even distribution of neighbourhood / community serving retail nodes, with similar tenant mixes, serving all other local catchments. This is, of course, not an accurate representation of the retail landscape of the City. If the competitive or regulatory context is such that a retail strip serves a larger catchment (e.g. 800 metres, 1km, or more), then there would be more retail spend opportunity for that area, and consequently, more justification for additional floor space at that location.[14]
    - A 400m radius contains approximately 50 hectares of land.
    - An 800m radius contains approximately 200 hectares of land.
    - If each area has a population density of 100 persons per hectare, then the 400m radius has 5,000 residents and the 800m radius has 20,000 residents.
    - The 5,000 residents in the 400m catchment can, based on the assumptions used in the table above, support approximately 2 to 2.5 blocks of retail frontage (~60,000 square feet), while the 20,000 residents in the 800m catchment could support 8 or more blocks (180,000+ square feet).
3. A larger dollar capture would support more floor area: It is important to consider the competitive environment around a retail area. The table assumes that the capture rate for neighbourhood retail dollars is around 40%. If there are many competitive options nearby, this proportion may be lower. If an area is relatively isolated, then the proportion may be higher. There will also be considerable variability in capture rates between retail categories.

3.2.2 ANCHORING, COMPLEMENTARY TENANTS AND CLUSTERING

One of the primary hallmarks of a successful retail node is an anchor tenant. An anchor use, or activity generator, can be a retail or non-retail use (or some combination) that drives foot traffic and businesses to an area, as discussed above. They are critical for sustaining smaller, more specialized shops and services in an area.

[14] Note that the retail demand methodology deployed in the parallel scope of work is considerably more nuanced and sophisticated than this example. It accounts for existing retail by category, household spending by category (and its variability by income levels), retail performance variability by category, and typical travel patterns for shopping trips.

As mentioned previously, grocery stores are common anchors in retail villages or larger commercial areas. However, any store that attracts visitors can act as an anchor, as can community uses, like public libraries or recreation centres.

While an anchor is often a retail use (and most typically a grocery store or grocery cluster), there are other uses that can be effective drivers of traffic such as libraries, schools, and community centres. There is evidence of school closures being directly linked to decreases in sales in nearby retail areas.[15] Many of the early neighbourhood corner stores in Vancouver were sustained by their proximity to a school. Some parks may have a similarly generative effect.

Common examples of anchors within the context of a neighbourhood-serving commercial area are:

- Grocery stores / Small markets (e.g., 1,000 to 5,000 sq.ft.)
- Grocery clusters (e.g., greengrocer + meat market + bakery)
- Pharmacies with basic retail grocery offerings
- Combination businesses with a retail grocery function (e.g., café + grocery + another use)
- Clusters of related stores or restaurants
- Cultural, civic, institutional uses

The **design and placement** of anchors is important. Anchors can add to the attractiveness of a street if they are well-integrated into the urban block and provide retail street contiguity. Blank walls should be activated, possibly with the integration of smaller, shallow inline retail units.

New or expanded commercial areas should **complement and not compete** with existing commercial areas. The City's annual Storefronts inventory provides valuable information in this regard, for developers, landlords and their leasing agents and retailers doing site selection work.

Non-retail anchors like community centres may include retail / service uses such as cafes or restaurants, with outdoor seating. These uses should be street-oriented and not internalized. An excellent example of this is Creekside Community Centre in Olympic Village. Examples of internalized food & beverage in community centres which have not worked well historically are Dunbar, Kitsilano and Trout Lake Community Centres.

Visibility is critical for anchors, and for all retailers. Some local examples of the importance of visibility include the East Fraser Lands (River District) and Leg in Boot Square (South False Creek). In the River District, during negotiations with the City of Vancouver, the grocery store and drug store (which are anchors for the retail in that development), indicated a desire for exposure to Marine Drive. People turning off Marine Drive to visit those anchor stores will support the smaller businesses, creating success for all businesses in the area. By comparison, Leg in Boot Square – where there once was a convenience store – did not have good visibility, resulting in that space eventually being converted to a business category (physiotherapy) that is not reliant on visibility and foot traffic for operational longevity. Areas without good visibility and high volumes of foot traffic will only be attractive to destination businesses.

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[15] This was noted by interviewees during research conducted for the 2020 *Retail-Commercial Small Business Study* prepared for the City.

While anchors are critical to the health of a retail node, the combination of different types of successful businesses in a node, or clusters of similar types of businesses, can drive success for a collection of businesses. Ultimately, businesses want to be close to other businesses. Research has shown that isolated retail often attracts less foot traffic compared to retail that is close to other shops and services.[16]

Stores want to be located next to other stores, and clusters of the same types of stores can also be a benefit. When M.E.C. was located on West Broadway, it attracted other outdoor equipment stores to the area that wanted to draw upon visitors to M.E.C., creating what was colloquially referred to in the brokerage community as the "polar fleece district." Having multiple outdoor equipment stores within close proximity benefited all the businesses. That is an example of a **cluster**.

3.2.3 CORNERS AND EDGES

Guided by the above principles related to residential area density, retail areas must have clearly defined edges through a clear transition in land use and public realm. It should be very clear where the retail precinct begins and ends. This principle applies in areas where retail transitions into residential areas, but also in corridors / districts where retail and light industrial are adjacent or sometimes interspersed.

Within the context of neighbourhood and / or community-serving retail areas, a **1-2 block anchored precinct** with contiguous storefronts at grade is a reasonable standard. With sufficient surrounding population density, there may be an opportunity for more than 1-2 blocks (e.g., areas where high-density Villages intersect or overlap). However, each 'segment' of the street should be clearly distinguishable by the location of anchor tenants.

Over-designation of retail in a linear corridor, or placement of too much commercial frontage along multiple and possibly competing commercial streets, can quickly dilute the energy of an area and lead to vacant space or space that has trouble retaining tenants that generate foot traffic. Storefront contiguity is important. If retail is interrupted by gaps such as drive throughs, blank walls, surface parking lots, empty lots etc., this can be problematic to the success of the area.

Throughout the City there are examples of high street retail on multiple corners. (41st & Granville, 1st & Nanaimo, East Broadway & Nanaimo, 16th & MacDonald). Historically the preference of the independent grocer was a corner location – hence the name "corner grocer." This applies also to larger stores where the visibility and profile gained from a corner location is important. **Anchor stores will often seek the exposure offered by corner locations.** However, this comes with a rent premium and possible challenges for access / egress. For some grocery store operators, they may prefer a slightly lower profile location off of a major arterial, which may be offered at lower per-square-foot rent.

The corner sets the tone for adjacent retail and the block, and helps draw shoppers. It adds vitality and pedestrian traffic. The corner is an opportunity to create a **gateway** and a **well defined "edge"** to the shopping precinct. Higher visibility provides additional exposure for the retail business from 2 streets. When part of a 1-2 block precinct, this corner can be beneficial over a mid-block location by raising the profile of the precinct to arterial traffic from multiple directions.

[16] Dina Botwick, "Saving Mom and Pop: Zoning and legislating for small and local business retention.", Journal of Law and Policy.

While there are few disadvantages to a corner location for a retail outlet, it can depend on the following factors:

- It is dependent on the **size and frontage**, and placement of store entrance.
- **Type of use** (e.g., a consignment store sets a different tone for a block than a destination apparel store, or a restaurant).
- Banks can create inactive frontage to the street, especially in evening hours.
- The scale of the corner development, if not part of the main retail precinct, may draw energy away from the core of the retail precinct. This issue can emerge at the intersection of major arterials where retail has emerged at all four corners. This can serve the customer base effectively depending on the nature of the retail at these locations, but it is dependent on the context in each case (i.e., scale, use, local customer type etc.)

3.2.4 FLEXIBLE AND APPEALING STOREFRONTS

Retail is dynamic and always changing. Different businesses have different lifecycles, and entire categories that exist and thrive today may become irrelevant tomorrow, replaced by entirely new categories that we cannot yet foresee. Recognizing this, a key planning principle is the creation of commercial spaces that are appealing and flexible to changing needs over time.

A mix of building styles and sizes create interesting precincts that are more resilient to change. A mix of storefront sizes allow for a range of business types. Some key elements related to building massing and geometry are as follows:

- Emphasize primary entrances to each tenant through recessing of entrances.
- Use canopies and other forms of weather protection along the building facade, being careful to balance weather protection needs with visibility of each storefront.
- Avoid designing irregular shaped units. Rectangular spaces with good sightlines to entrances are best for most tenants.
- Units with storefront depth ratios of 1:3 tend to work well for most tenants. Corner locations tend to work best with a 1:1 ratio. Avoid narrow and deep retail units.
- Accommodate larger stores on pedestrian-oriented streets through a rectangular floor plate. If that is not possible, an L-shaped floor plate is feasible (but not preferred). A 20-30 foot storefront presence can be maintained, with the rest of the frontage wrapped with small, shallow boutique retail stores at a 1:1 size ratio. This type of wrapping can also be effective for other ground-level uses (e.g. residential).
- Avoid blank wall space which can sometimes be present along the linear frontage of retail grocery stores. Financial institutions can also create inactive street frontages.
- Contiguous storefronts – spaces that are directly adjacent to each other activates the street .and improves the customer experience.
- Entrances should be at grade. Avoid stairs up and down, and columns. Understand that the storefront is an extension of the street and signage both for pedestrians and cars is important for the viability of the business.
- An active streetscape can be created through placement of at least (and ideally more than) 10 storefront doors per 100 linear metres. A truly engaging, pedestrian-friendly retail environment with many smaller retailers would have 15-20 doors per 100 linear metres.

Different types of tenants need different sizes and configurations. It is important to assess local market conditions and have a clear tenant mix strategy before designing the ground floor of a new space.

3.3 OTHER PRECONDITIONS FOR RETAIL AREA SUCCESS

The City's policy framework and investment priorities create the preconditions for successful, resilient, adaptable retail precincts. This support can come in a variety of forms, including the following:

- Public realm investments
    - Creating complete streets and multi-modal access
    - Creating a clean, safe, and friendly public realm
    - Ensuring appealing and flexible building design and quality interface between buildings and the public realm
- Building and unit sizes and layouts
    - Ensuring that retail spaces are optimized for adaptability and convertibility over time, recognizing that retail evolves much faster than the cycle of building replacement.
    - Appropriate sizes and layouts vary depending on the market positioning of a retail precinct. For instance, a highway commercial area will have different building size and configuration requirements than a neighbourhood-serving commercial area.
- Competition
    - Being aware of the different and complementary roles that each retail precinct plays within the broader ecosystem, and ensuring that the preconditions are in place to allow the precinct to effectively serve its target market and intent.
- Population and job density
    - Neighbourhoods with a strong local population base have a greater chance of supporting a thriving and resilient local shopping area. The City sets the regulatory framework for neighbourhood intensification.
- Zoning, permitting and licensing.
    - Zoning definitions should be flexible and allow businesses to do multiple things, in varying proportions depending on the business model and local conditions. This should include the combination of small-scale production, on-site consumption, sale of retail grocery products, and storage / distribution. Regulation should focus more on form than use.
    - Facilitate pop-up stores or other pop-up installations to occupy vacant space / lots and to facilitate growth of local entrepreneurs.
    - Allow for flexible, temporary zoning for properties being rezoned that are undergoing redevelopment, to facilitate temporary uses.
    - Complex permitting and application requirements force many businesses to engage a variety of professionals at considerable cost. Permitting times are a major disincentive to starting and operating a business, and can lead to substantial (and often critical) financial hardship for small businesses as they must pay rent, maintenance and property taxes during lengthy periods where they cannot generate revenue.
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4.0 VILLAGE AREA PROFILES AND RETAIL CONSIDERATIONS

4.1 OVERVIEW

This section presents profiles of each of the seventeen (17) Village that are part of the City's Villages Planning Program, covering the following topics for each:

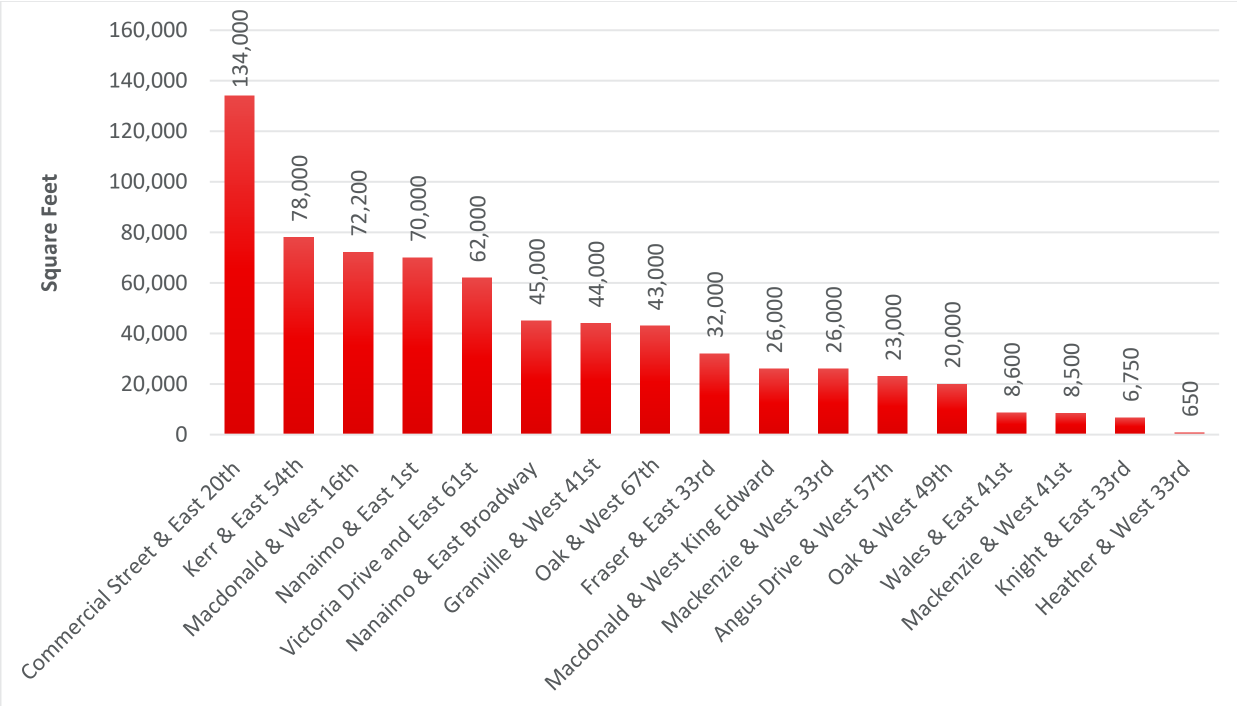
- **Geography:** Geographic extent (Village area boundaries as defined by the City);
- **Retail Mix and Location:** Existing retail floor area by category within each Village, using a combination of the City's Storefronts Inventory data and supplementary field surveys conducted by the consulting team;
- **Vacancy**: Current vacancy rates in each Village, based on Storefronts Inventory and supplementary field surveys. Vacancy is the best indicator of health & vitality other than sales, which are generally not available for independents outside shopping centres where they are submitted to the Landlord for determination of percentage rent;
- **Retail Proximity**: overview of proximate retail offerings outside of each Village, again using the Storefronts Inventory and supplementary field surveys;[17]
- **Area characteristics:** observations on unique characteristics of each Village, through a retail planning and leasing lens;
- **Area socio-demographic profile:** population, households, income and other variables within Village boundaries
- **Latent incremental opportunity:** results of initial quantitative modelling work, identifying extent of opportunity for Village retail footprint expansion under today's conditions (population, expenditures, and competitive landscape);
- **Retail expansion areas:** Preliminary commentary on areas to focus for retail expansion. Note that this commentary is provided in the absence of forecasts quantifying the extent of future retail support, and therefore expansion commentary should be re-visited following completion of future forecasting work.

Village names are derived from the rights-of-way intersection at the geographic core of each Village area; they do not necessarily represent the area of focus for existing retail, or the optimal locus for future retail activity. Village profiles are organized in two broad categories – those located on Vancouver's West Side (i.e., west of Ontario Street), and those located on Vancouver's East Side (east of Ontario Street).

The 17 Village areas vary considerably in terms of their existing retail mix, area characteristics, retail proximity, and local populations. Taken together, the Villages contain nearly **700,000 square feet of retail and service commercial floor area today.**

[17] In some cases, the proximate retail areas outside of a Village are located within another Village.

Figure 2: Total Retail Inventory by Village Area



A large majority (>80%) of the Villages already have some form of retail grocery offering, with 5 of the 17 (30%) having retail grocery anchors over 5,000 square feet and 4 of the 17 (24%) having grocery stores over 10,000 square feet The 54th and Kerr Village is an anomaly amongst the 17 Villages, as it is focused on a grocery-anchored unenclosed community shopping centre, and has a large (~27,000 square foot) retail grocery store. Other Villages are delivering their current retail through a street-oriented environment with a fragmented ownership pattern.

Amongst the three Villages besides Kerr & 54th with larger grocery stores, those stores range in size from 6,000 to just under 12,000 square feet.

Of the 12 Villages (70%) without >5,000 square-foot retail grocery anchors:

- Two (2) have grocers / produce stores around 1,000-2,000 square feet.
- Six (6) have some combination of specialty grocery offerings that fill at least some day-to-day needs of local residents.

There are only three (3) Villages (18%) with no retail food offerings at all: Wales & East 41st, Mackenzie & West 41st and Heather & West 33rd.

- Heather & 33rd Village will likely see grocery-anchored development emerge as part of future Heather Lands redevelopment;
- Mackenzie & West 41st Village is unlikely to be a good candidate for any significant future grocery presence, given proximity to commercial areas at Dunbar & Wet 41st, Kerrisdale, and Mackenzie & West 33rd.
- Wales & East 41st is likely a stronger candidate for future grocery given relative distance from competitive nodes.

Table 4: Retail Grocery and Pharmacy Floor Area (square feet) in Villages as of 2024

Village	Supermarket / Grocer	Specialty Grocery	Convenience Store	Pharmacy – Full Retail Mix
West Side Villages				
Macdonald & W. 16th	11,788	2,000	1,500	0
Macdonald & W. King Edward	0	3,800	0	0
Mackenzie & W. 33rd	1,200	3,000	0	0
Mackenzie & W. 41st	0	0	0	0
Granville & W. 41st	0	0	3,300	
Oak & W. 49th	0	1,000	0	0
Angus & W. 57th	5,700	0	0	0
Oak & W. 67th	0	0	2,500	0
Heather & W. 33rd	0	0	0	0
East Side Villages				
Fraser & E. 33rd	10,000	0	0	0
Knight & E. 33rd	0	2,000	3,400	0
Commercial St. & E. 20th	11,000	0	1,600	0
Victoria & E. 61st	0	1,700	5,000	0
Wales & E. 41st	0	0	0	0
Kerr & E. 54th	29,000	800		3,100
Nanaimo & E. 1st	2,000	13,600	3,500	0
Nanaimo & E. Broadway	0	1,500	1,000	0

The opportunity for new or expanded retail grocery in Villages will be dependent on many factors including:

- Location of a Village in relation to other retail areas (including other Villages) with existing or growing retail grocery offerings;
- Projected growth of Village area population and / or daytime workforce;
- Ability to physically accommodate new retail floor area within Villages at a size, configuration and lease rate that is operationally attractive and financially viable.

Sections 4.2 and 4.3 below offer Village-by-Village snapshots and include preliminary commentary on opportunities for retail growth.

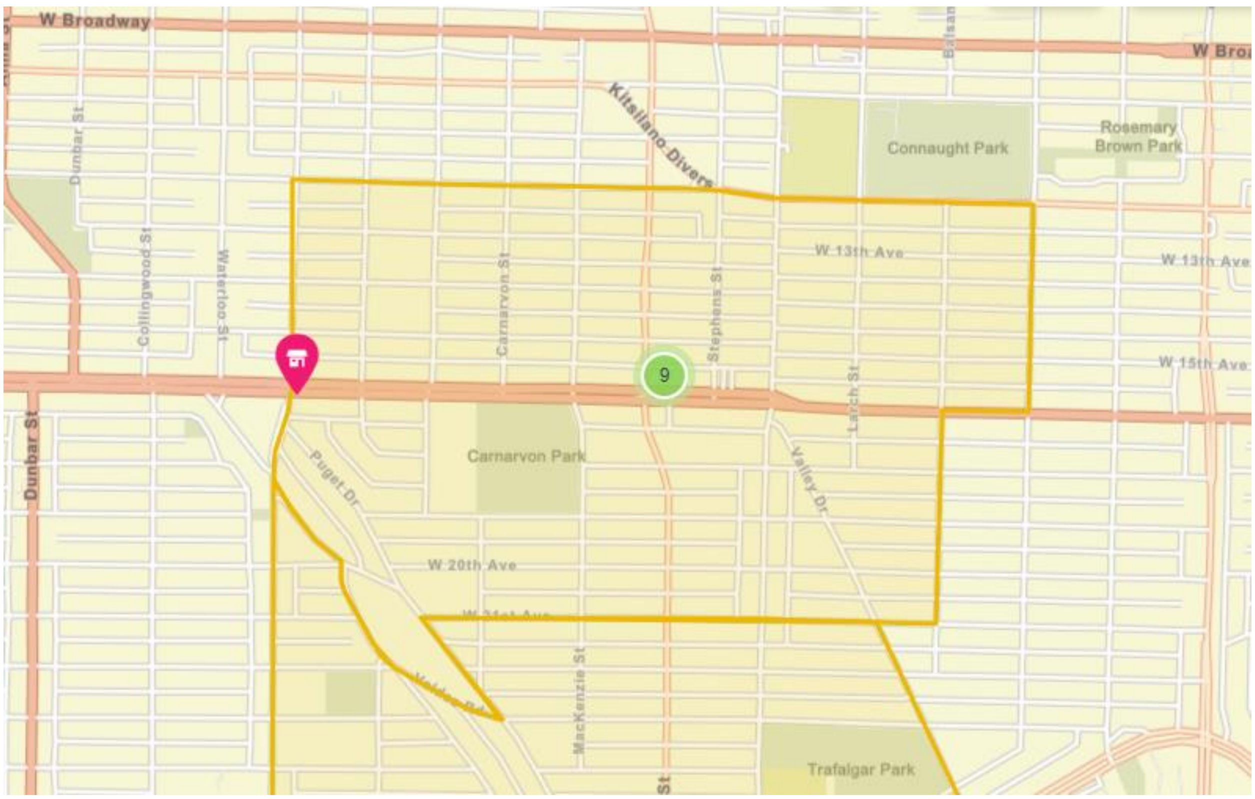
4.2 WEST SIDE VILLAGES

4.2.1 MACDONALD & WEST 16TH AVENUE

Village Boundaries

The Macdonald & West 16th Avenue Village is bisected north-south by these two Secondary Arterial rights of way. The initial draft Village area is bounded by approximately West 12th Avenue in the north, West 21st Avenue in the south, Blenheim Street in the west, and Balsam Street in the east.

Figure 3: Initial Draft Boundaries of Macdonald & West 16th Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Macdonald & West 16th is one of five Villages with more than **50,000 square feet of existing retail** floor space. It also has a thriving grocery anchor – a nearly 12,000 square-foot Choice's market. The Village is comprised of retail floor area largely running east-west along the north side of West 16th Avenue. This includes a strip-centre (formerly anchored by a convenience store) at the northwest corner, a small node on the northeast corner with frontage along both West 16th and Macdonald, followed by a 200-foot linear strip running from Stephens Street to just past Trafalgar. The latter portion of this strip contains the aforementioned Choices market. There is a multi-level professional services building on the south side of West 16th Avenue east of Macdonald (at Bonsai Street).

Table 5 Retail Floor Area Statistics by Retail Categories Within Village Node, Macdonald & West 16th Avenue

	Floor Area (sq. ft.)	% of Total Floor Area
Convenience Goods	**15,288**	**22.3%**
Supermarket	11,788	17.2%
Grocer & Produce	0	0.0%
Specialty Grocery	2,000	2.9%
Convenience Store	0	0.0%
Other Food Retail	1,500	2.2%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**2,000**	**2.9%**
Accessories	1,000	1.4%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	1,000	1.4%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**8,703**	**12.7%**
Fast Food	1,523	2.2%
Restaurant	5,590	8.2%
Café & Specialty	1,590	2.3%
Service Commercial	**37,816**	**55.2%**
Personal Services	9,343	13.64%
Professional Services	25,449	37.15%
Automotive Services	1,500	2.2%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	1,523	2.1%
Vacant	**4,692**	**6.9%**
Vacant	4,692	6.9%
Vacant Under Construction	0	0.0%
Institutional (non-retail)	**0**	**0.0%**
Total – All Categories	**68,499**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**68,499**	**100.0%**
Total – Occupied Retail and Service Commercial	**63,807**	**93.2%**

Retail Proximity

In addition to already being a strongly anchored retail cluster, residents of this Village have additional offerings within 800 metres of the Village core (largely at the neighbouring Village to the south), and again within 1200 metres. The offerings within 1200 metre distance are significant, including many retail grocery offerings along West Broadway including the 55,000+ square foot Safeway store at Broadway and Macdonald.

Table 6 Retail Floor Area Statistics by Retail Categories Outside Village Node, Macdonald & West 16th Avenue

	Floor Area (sq.ft.) Within 800 Metres (m)	Floor Area (sq.ft.) 800 - 1,200 Metres (m)
Convenience Goods	**8,084**	**129,931**
Supermarket	0	67,210
Grocer & Produce	0	9,338
Specialty Grocery	2,554	7,107
Convenience Store	0	2,250
Other Food Retail	0	5,449
Pharmacy – Full Retail Mix	0	13,349
Pharmacy Plus	0	800
Pharmacy Only	0	0
Alcohol + Cannabis	893	2,923
Personal Goods	2,739	15,774
Other Convenience Retail	1,898	5,732
Comparison Goods	**8,587**	**50,706**
Accessories	0	3,474
Clothing	2,624	12,812
Hardware / Garden Store	2,953	3,556
General Merchandise	3,010	21,587
Home Goods	0	4,240
Sporting Goods	0	1,700
Art Goods	0	837
Automotive Goods	0	2,500
Food & Beverage	**7,683**	**86,712**
Fast Food	1,500	14,039
Restaurant	4,530	49,559
Café & Specialty	1,653	23,114
Service Commercial	**18,821**	**85,583**
Personal Services	3,398	28,458
Professional Services	12,289	34,891
Automotive Services	2,000	1,500
Community Services	0	2,612
Office Services	1,134	5,262
Fitness / Recreation Services	0	12,859
Vacant	**0**	**8,929**
Vacant	0	6,086
Vacant Under Construction	0	2,843
Institutional (non-retail)	**0**	**0**

Total – All Categories	**43,175**	**361,861**
Total – All Categories Excluding Non-Retail Institutional	**43,175**	**361,861**
Total – Occupied Retail and Service Commercial	**43,175**	**352,932**

Area Characteristics

The Macdonald & West 16th Village is ideally located along the attractive east-west boulevard of West 16th Avenue, offering ample street and off-street parking, along with good access via multiple transportation options. The area features a strong mix of tenants and is a strongly anchored retail cluster.

Socio-Demographic Profile

The socio-demographic profile of the Macdonald & West 16th Village is characterized by a predominance of owner-occupied households, with a median household income approximately 20% higher than the city-wide average. The area also has a significantly higher proportion of 3- and 4-person families compared to the city as a whole, resulting in a larger average household size of 2.7, compared to the city-wide average of 2.3.

	Village	City-Wide
Population (2021)	5,520	662,263
Total Households	2,110	305.026
1-person household	485 (23%)	119,510 (39%)
2-person household	670 (32%)	100,690 (33%)
3-person household	400 (19%)	38,685 (13%)
4-person household	365 (17%)	29,125 (10%)
5+ person household	105 (5%)	17,100 (6%)
Average Household Size (people)	2.7	2.3
Median Household Income ($)	$108,000	$89,8762
Owner Households	67%	46%
Renter Households	33%	54%

Latent Incremental Opportunity

Based on preliminary demand modelling work and using current population estimates, the retail floor area extent of this Village is in approximate balance with the current state of market demand. There may be marginal opportunity expansion for convenience, liquor and pharmacy-type goods, although these are more likely indicators that current businesses are outperforming industry benchmarks.

Retail Expansion Opportunities

Based on the current locations of retail and the existing retail grocery anchors, along with a high-level assessment of where redevelopment opportunities are more likely to emerge[18] (visual assessment only), the 2700 block on the north and south sides of West 16th Avenue are the logical areas for retail expansion. On the north side, infill of the 2700 block would fill the storefront west of Choices up to Macdonald. On the South side, there could be expansion potential east of the existing Macdonald Medical Centre, up to Trafalgar. This would create a coherent, double-loaded full-block retail precinct with a grocery anchor at its core. From a retail perspective the boulevard along West 16th creates a visual barrier across West 16th, however there is a mid-block crossing point and the boulevard is a strong defining characteristic of the Village.

[18] Please note – no financial analysis has been prepared to assess the prospects of lot assembly and redevelopment. Assessment of “opportunity” areas are based on primarily on retail operations considerations, and a cursory visual review of building age and condition.

MacDonald & 16th SWOC Analysis

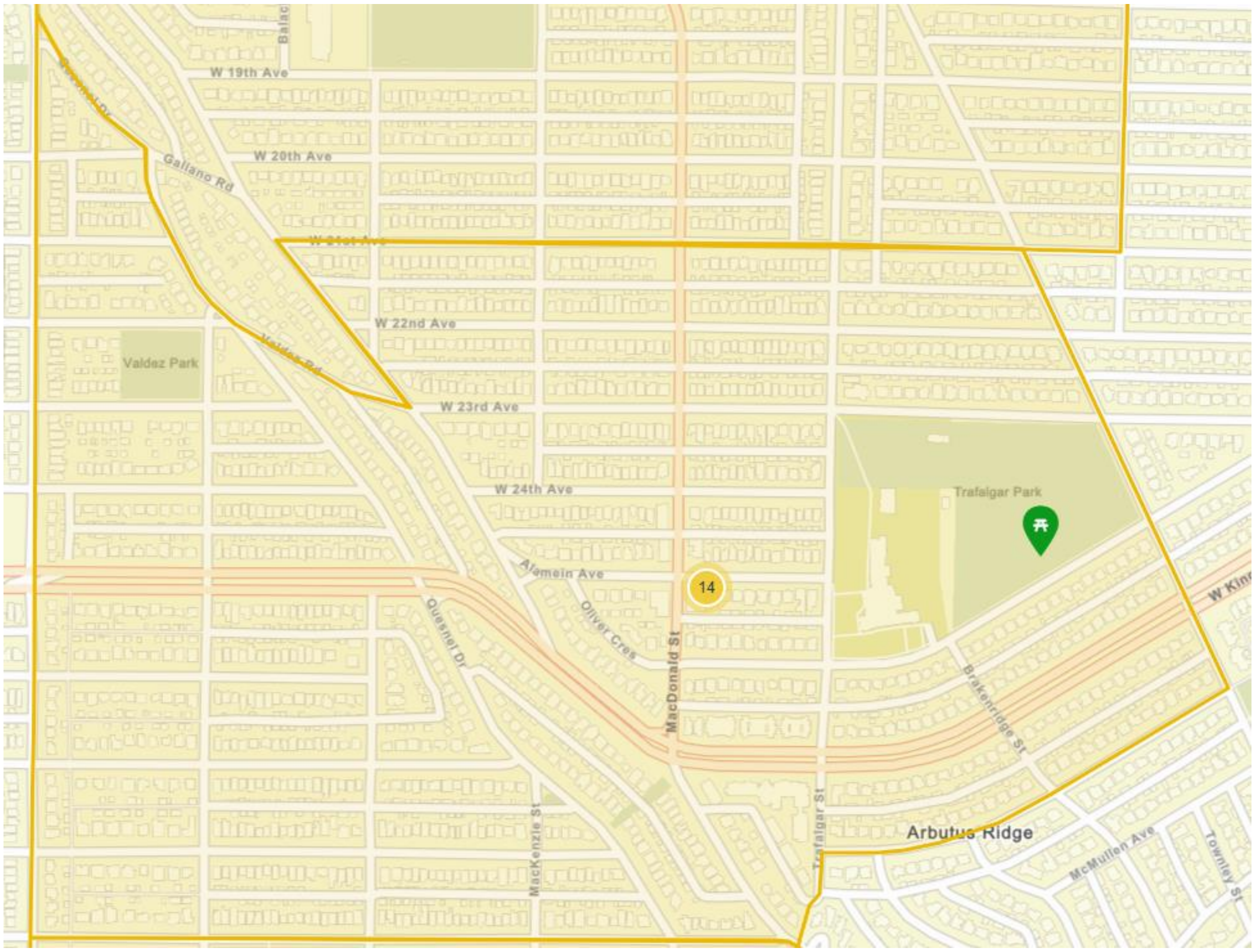
Strengths	Weaknesses
• Located along 2 secondary arterials. • Has retail grocery anchor • Well-established commercial area with longstanding anchor grocery – Choices Market (11,788 square feet) at 2627 West 16th Avenue with its own surface parking lot. • Access / egress is very good, and there is abundance of street parking • Many other specialty food / restaurant uses. • Other non-residential uses in area attract people (Macdonald Medical building) • Relatively low vacancy • Dominance of professional services creates significant draw. • Attractive public realm (sidewalks, tree canopy, boulevard) • Walking distance to two schools and large park	• Lack of contiguous retail, and contiguity interrupted by surface parking lot and residential along 2700 block on north side. • Retail development west of Macdonald does not serve to strengthen core retail area east of Macdonald. • Does not currently have double-loaded retail along W. 16th. • The north-west corner of MacDonald and 16th Avenue has a neighbourhood strip centre built in 1980 with parking between the storefronts and the sidewalk which suits the convenience needs of the passing vehicular traffic but is not pedestrian friendly and competes with the retail precinct east of MacDonald on the north side of 16th Avenue
Opportunities	**Challenges**
• Infilling along 2700 block on north and south sides no opportunity on south side 2700 block • Build on existing strong retail / service mix and 20, 735 square foot grocery anchor Choices. • Need to clarify the role the 2600 block of West 16th Avenue is to play in the Village. • Building on the present scenario it looks like a hybrid situation with commercial at grade on the 4 corners of 16th & MacDonald and a linear precinct 2700 lock + 2600 block?? • Uses for the 4 corners will be different than the linear precinct for the 2700 2600 blocks	• Boulevard along W. 16th crates visual obstruction that may preclude opportunity for cohesive, double-loaded corridor. • According to the DP sign for 2730 West 16th the proposed redevelopment of this property will not include commercial so double-loaded corridor on the south side of the street opposite Choices Market is not happening. • The other redevelopment at 3215 West 16th Avenue on the south side of the street is at the southwest corner of 16th and MacDonald. This project will include commercial at grade. It reinforces commercial on the 4 corners of 16th & MacDonald rather than the potential to infill along 2700 block on the north side

4.2.2 MACDONALD & WEST KING EDWARD AVENUE

Village Boundaries

The Macdonald & West King Edward Avenue Village is centered on Macdonald Street and West King Edward Avenue. It is bounded by West 21st Avenue to the north, Valley Drive to the east, West 26th Avenue to the south, and Blenheim Street to the west.

Figure 4 Boundaries of Macdonald and West King Edward Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The retail in the Macdonald and West King Edward Avenue Village runs north-south on Macdonald Street and spans a 500-foot strip from Oliver Crescent to W 24th. This retail cluster is primarily made up of service commercial businesses (e.g., dry cleaners, insurance agencies) along with restaurants and some specialty retail food offerings (e.g., a bakery, a deli, and a specialty shop). There are no retail anchor businesses larger than 5,000 square feet, and there is no full-service grocery store. Trafalgar Elementary School, located within this village, serves as a non-retail anchor for the community. The Driver Licensing Center is also a destination draw, although it has limited retail spillover (aside from daytime working population).

Table 7 Retail Floor Area Statistics by Retail Categories Within Village Node, Macdonald & West King Edward Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**5,125**	**19.7%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	3,831	14.7%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	1,294	5.0%
Comparison Goods	**3,540**	**13.6%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	2,703	10.4%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	837	3.2%
Automotive Goods	0	0.0%
Food & Beverage	**5,594**	**21.5%**
Fast Food	0	0.0%
Restaurant	5,594	21.5%
Café & Specialty	0	0.0%
Service Commercial	**8,920**	**34.3%**
Personal Services	1,603	6.2%
Professional Services	3,205	12.3%
Automotive Services	1,500	5.8%
Community Services	2,612	10.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**2,843**	**10.9%**
Vacant	0	0.0%
Vacant Under Construction	2,843	10.9%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**26,021**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**26,021**	**100.0%**
Total – Occupied Retail and Service Commercial	**23,178**	**89.1%**

Retail Proximity

Currently, this Village has no additional offerings within 800 metres of its core. However, residents can access grocery options at Choices Market, located at the intersection of Trafalgar and West 16th Avenue, within 1,200 metres of the Village (i.e., within the Macdonald & West 16th Village).

Table 8 Retail Floor Area Statistics by Retail Categories Outside Village Node, Macdonald & West King Edward Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**19,000**
Supermarket	0	0
Grocer & Produce	0	15,500
Specialty Grocery	0	2,000
Convenience Store	0	0
Other Food Retail	0	1,500
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	0
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**2,837**
Accessories	0	1,000
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	1,000
Home Goods	0	0
Sporting Goods	0	0
Art Goods	0	837
Automotive Goods	0	0
Food & Beverage	**0**	**8,703**
Fast Food	0	1,523
Restaurant	0	5,590
Café & Specialty	0	1,590
Service Commercial	**0**	**41,808**
Personal Services	0	9,343
Professional Services	0	27,052
Automotive Services	0	1,500
Community Services	0	0
Office Services	0	0
Fitness / Recreation Services	0	3,913
Vacant	**0**	**4,692**
Vacant	0	4,692
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**0**

Total – All Categories	**0**	**77,040**
Total – All Categories Excluding Non-Retail Institutional	**0**	**77,040**
Total – Occupied Retail and Service Commercial	**0**	**72,348**

Area Characteristics

The Macdonald & West King Edward Avenue Village is characterised by older, low-density, single-level street retail, which gives the area a distinct, neighbourhood-focused feel. The public realm is well-designed, with street trees that create a welcoming pedestrian environment. However, the area has no retail anchor that draws people to the Village. Historically, this area did have a small corner grocer (Jimmy's Market), which was a family-run independent business that closed when the proprietor retired. The area has some street parking available, providing added convenience for visitors.

Socio-Demographic Profile

The socio-demographic profile of the Macdonald & West King Edward Avenue Village closely mirrors that of the neighbouring village to the north, with a similar average household size and comparable household income levels.

	Village	City-Wide
Population (2021)	4,078	662,263
Total Households	1,580	305.026
1-person household	420	119,510 (39%)
2-person household	455	100,690 (33%)
3-person household	300	38,685 (13%)
4-person household	290	29,125 (10%)
5+ person household	130	17,100 (6%)
Average Household Size	2.7	2.3
Median Household Income	$106,175	$89,8762
Owner Households	65%	46%
Renter Households	35%	54%

Latent Incremental Opportunity

Initial demand modelling suggests that there may be opportunity at this node for moderate floor area expansion (possibly as much as +20,000 square feet), given the relative distance from this retail node to other notable nearby clusters, most notably 16^{th} and Macdonald, Dunbar Village, and Arbutus Village. There is possible latent opportunity for retail grocery and pharmacy up to about 8,000 square feet, along with associated convenience retail, personal services and additional restaurants.

Retail Expansion Opportunities

It may prove challenging to find financially viable areas for retail footprint expansion in this Village, given likely costs of lot assembly for future development. Future expansion of retail frontage along Macdonald beyond the 4000 and 4100 blocks will be challenged by lack of laneway access for loading and parking, thus requiring more lot assembly and creation of back-of-building access. There may be opportunities for retail as part of future redevelopment on east-west roads, such as Alamein Avenue, or Oliver Crescent, however care should be taken not to over-designate ground level retail and create competing streets. Precise edges for this Village should be re-visited following completion of population and retail opportunity forecasting work.

MacDonald & West King Edward SWOC Analysis

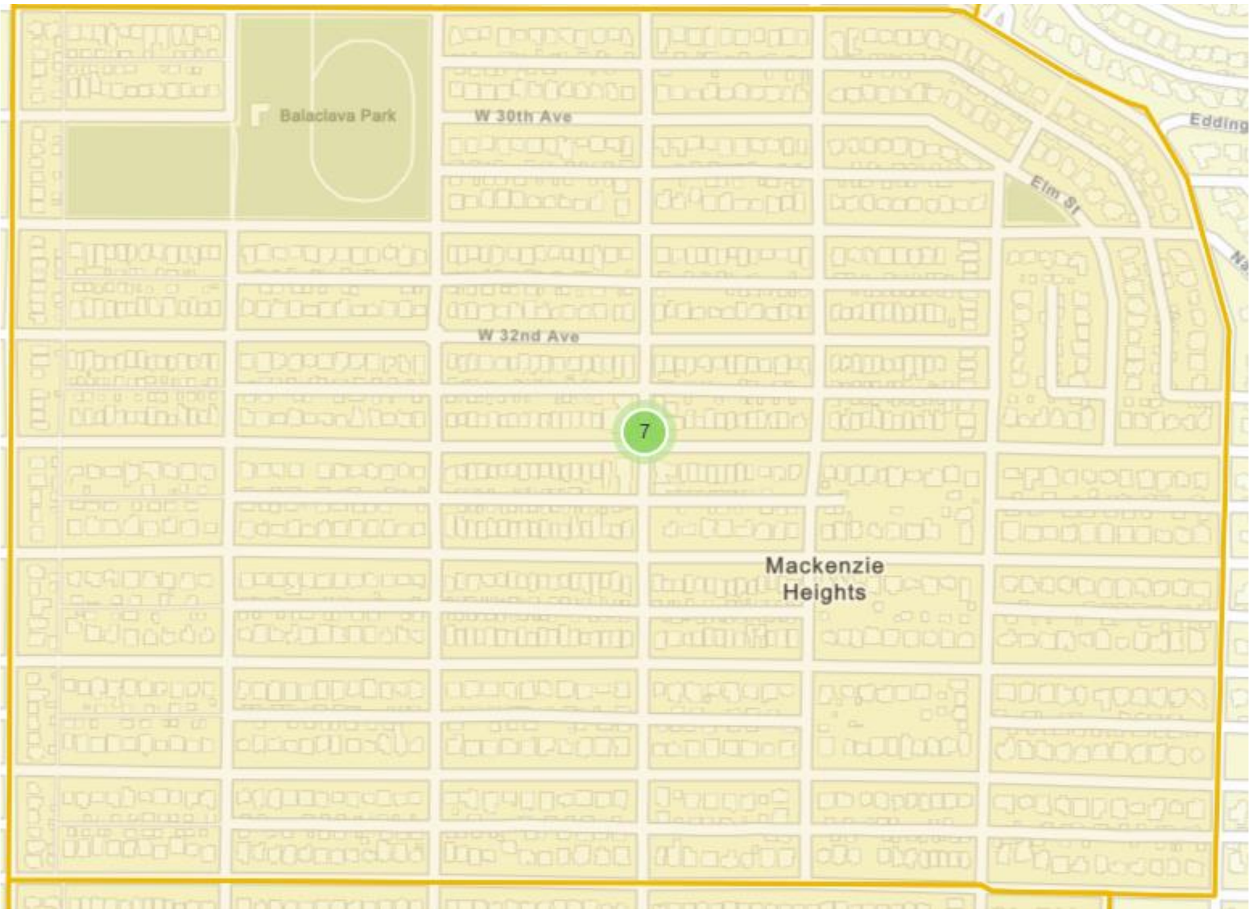
Strengths	Weaknesses:
• Tenant Mix includes: o Destination restaurant – Buca di Roma at 4025 MacDonald Street o The Patty Shop at 4019 MacDonald Street o Mon Garenne Bakery at 4021 MacDonald Street o Tachia Bakery and Deli at 4111 MacDonald Street o ICBC Driver licensing centre is a major destination draw at 4126 MacDonald Street o Ridge Garden Restaurant at 4009 MacDonald Street o Proximity to Trafalgar Elementary o Ease of street parking along Macdonald or east-west streets o Bus stop at King Edward & Macdonald	• For decades, this Village was anchored by a corner grocery store -" Jimmy's Market" at 4075 MacDonald Street which served the convenience needs of the immediate neighbourhood which is now closed. • Primary destination draw (licensing centre) does not generate much retail traffic spillover. • Area does not currently serve local resident basic grocery needs. • No current area to accommodate retail grocery needs
Opportunities	**Challenges**
• Since the motor vehicle offices are the major anchor for this node, complementary businesses such as insurance, and related services should be encouraged / considered. • Future daycare use in the area will drive more customers	• Lack of clear area for retail expansion • Any future expansion in ground floor commercial should be limited to 2 specific blocks on the east and west sides of MacDonald: 4100 and the 4200 blocks of MacDonald.

4.2.3 MACKENZIE & WEST 33RD AVENUE

Village Boundaries

The Mackenzie and West 33rd Avenue Village is centred on Mackenzie Street and West 33rd Avenue. It is bounded by West 26th Avenue to the north, Larch Street to the east, West 37th Avenue to the south, and Blenheim Street to the west.

Figure 5 Boundaries of Mackenzie and West 33rd Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Retail in the Mackenzie Street and West 33rd Avenue Village is clustered at the intersection of Mackenzie and 33rd. There is a 200-foot strip of retail running north-south along Mackenzie. This area is primarily service commercial, including a dental office and insurance agency. There are also two bakeries and a specialty grocery store – Windsor Market. Windsor Market provides a variety of fresh groceries, a deli, and prepared food options, making it a convenient spot for residents to pick up both essentials and specialty items.

Table 9 Retail Floor Area Statistics by Retail Categories Within Village Node, Mackenzie & West 33rd Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**5,496**	**20.9%**
Supermarket	0	0.0%
Grocer & Produce	1,225	4.7%
Specialty Grocery	2,978	11.3%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	1,294	4.9%
Comparison Goods	**2,698**	**10.3%**
Accessories	0	0.0%
Clothing	1,861	7.1%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	837	3.2%
Automotive Goods	0	0.0%
Food & Beverage	**0**	**0.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	0	0.0%
Service Commercial	**13,802**	**52.6%**
Personal Services	1,603	6.1%
Professional Services	4,808	18.3%
Automotive Services	0	0.0%
Community Services	2,612	9.9%
Office Services	0	0.0%
Fitness / Recreation Services	4,779	18.2%
Vacant	**4,268**	**16.2%**
Vacant	4,268	16.2%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**26,264**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**26,264**	**100.0%**
Total – Occupied Retail and Service Commercial	**21,996**	**83.8%**

Retail Proximity

Currently, this Village has no additional offerings within 800 metres of its core. There are no additional grocery stores, supermarkets, or convenience stores within 1200 metres. The area is currently underserved in terms of availability of food and convenience goods. The closest larger grocery store is Stong's Market on Dunbar at 27th and Save-On Foods just east of Dunbar on 41st.

Table 10 Retail Floor Area Statistics by Retail Categories Outside Village Node, Mackenzie & West 33rd Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**0**
Supermarket	0	0
Grocer & Produce	0	0
Specialty Grocery	0	0
Convenience Store	0	0
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	0
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**0**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	0
Home Goods	0	0
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**0**
Fast Food	0	0
Restaurant	0	0
Café & Specialty	0	0
Service Commercial	**0**	**8,515**
Personal Services	0	2,161
Professional Services	0	6,353
Automotive Services	0	0
Community Services	0	0
Office Services	0	0
Fitness / Recreation Services	0	0
Vacant	**0**	**0**
Vacant	0	0
Vacant Under Construction	0	0

Institutional (Non-retail)	0	0
Total – All Categories	**0**	**8,515**
Total – All Categories Excluding Non-Retail Institutional	**0**	**8,515**
Total – Occupied Retail and Service Commercial	**0**	**8,515**

Area Characteristics

The Mackenzie and West 33rd Avenue Village is characterised by single-detached dwellings, forming a predominantly residential community. The Village has a well-defined retail precinct with predominantly residential low-rise retail. There is limited street parking availability and narrow roadway. The area has a retail grocery store at Windsor Market, where the head lease is held by Windsor Meats. That business has a combination of retail grocery, specialty grocery, and in-house food, plus a catering business.

Socio-Demographic Profile

The socio-demographic profile of the Mackenzie Street and West 33rd Avenue Village is characterised by a significantly higher-than-average proportion of larger households, including 3, 4, and 5+ person households. The average household size in the village is 2.9, well above the city-wide average of 2.3. Additionally, the median household income in this area is 52% higher than the city-wide figure, reflecting a community with a higher-than-average standard of living.

	Village	City-Wide
Population (2021)	3,775	662,263
Total Households	1,325	305.026
1-person household	200 (15%)	119,510 (39%)
2-person household	450 (34%)	100,690 (33%)
3-person household	250 (18%)	38,685 (13%)
4-person household	250 (18%)	29,125 (10%)
5+ person household	155 (12%)	17,100 (6%)
Average Household Size	2.9	2.3
Median Household Income	$136,250	$89,8762
Owner Households	78%	46%
Renter Households	24%	54%

Latent Incremental Opportunity

Initial draft demand modelling suggests there could be opportunity to double the size of this commercial Village under today's market conditions, including around 10,000 square feet of combined retail grocery and convenience retail.

Retail Expansion Opportunities

There may be modest retail expansion potential along Mackenzie Street, however retail expansion north or south along Mackenzie will run into challenges of shallow lots and the need to create opportunities for rear-of-building access for parking and loading. There are likely future opportunities for assembly and redevelopment along West 33rd. Such development would have the benefit of relatively deep lots and laneway access for parking and loading. The primary opportunity for enhancing retail grocery offerings in this area in the near future is to support future expansion of current businesses, such as Windsor Market. Part of this strategy would likely include discouraging competitive retail grocery from emerging immediately south, in the 41st & Mackenzie Village area.

Mackenzie & West 33rd Avenue SWOC Analysis

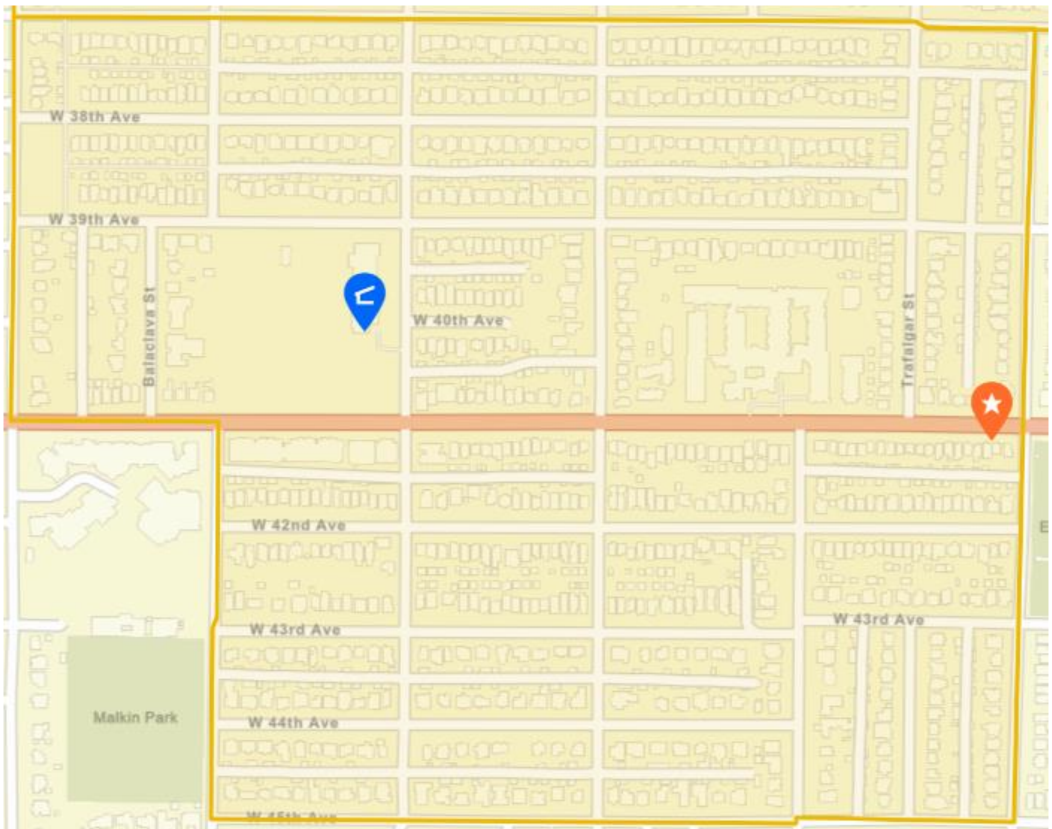
Strengths	Weaknesses:
• Food Uses in the 4800-4900 blocks include: Butter Baked Goods at 4907 MacKenzie serving pastries, and breakfast and lunch, plus retail grocery offerings at Windsor Market. Latter includes butcher, coffee counter, full line of dairy, produce and basic groceries. • 4800 block of Mackenzie has double-sided retail. This is the current 'heart' of the commercial Village.	• Some businesses operate odd hours, creating confusion and uncertainty as to whether a business will be open. • Fairly limited existing tenant mix, including underservice for pharmacy and personal services.
Opportunities	**Challenges**
• Tenant retention and expansion should be prioritized over new tenant recruitment. • Work with existing MacKenzie / Windsor Market to expand offerings as demand arises. • Explore possibility to expand into adjacent CRUs on the 4800 block of MacKenzie. • Northeast corner of 33rd & Mackenzie offers future redevelopment opportunity, and future tenant mix should complement rather than compete with existing grocery offerings. • Likely need to focus on retail grocery as ancillary use, rather than principal use (at least in near-term), however specific mix will be proponent driven and therefore the key will be flexible zoning and other supportive policy (e.g., patio permitting) that allows for businesses to evolve and pivot their business model to remain competitive.	• Street parking is limited and 33rd Avenue west of MacKenzie is too narrow resulting in cars parking on the boulevard to avoid being scraped. • Limited logical areas for retail floor area expansion

4.2.4 MACKENZIE & WEST 41ST AVENUE

Village Boundaries

The Mackenzie and West 41st Avenue Village is centred on Mackenzie Street and West 41st Avenue. It is bounded by West 37th Avenue to the north, Elm Street to the east, West 45th Avenue to the south, and Blenheim Street to the west.

Figure 6 Boundaries of Mackenzie and West 41st Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The Mackenzie and West 41st Avenue Village currently has limited retail offerings. The Village has 8,515 square feet of retail, with 100% of the space dedicated to service-commercial uses. The village is anchored by Kerrisdale Elementary School, which serves as a central community hub.

Table 11 Retail Floor Area Statistics by Retail Categories Within Village Node, Mackenzie & West 41st Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**0**	**0.0%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**0**	**0.0%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**0**	**0.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	0	0.0%
Service Commercial	**8,515**	**100.0%**
Personal Services	2,161	25.4%
Professional Services	6,353	74.6%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**8,515**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**8,515**	**100.0%**
Total – Occupied Retail and Service Commercial	**8,515**	**100.0%**

Retail Proximity

Residents of the Mackenzie and West 41st Avenue Village have access to a wide range of retail options within 800 metres of the Village core, though grocery retail is somewhat limited. However, within a 1,200-metre radius, the area offers a more substantial selection, including major grocery retailers such as Save On Foods and H-Mart at Dunbar and 41st, as well as specialty grocery stores, pharmacies, and other retail establishments in nearby Kerrisdale.

Table 12 Retail Floor Area Statistics by Retail Categories Outside Village Node, Mackenzie & West 41st Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**4,417**	**107,122**
Supermarket	0	29,736
Grocer & Produce	0	11,113
Specialty Grocery	0	12,379
Convenience Store	1,860	0
Other Food Retail	0	928
Pharmacy – Full Retail Mix	0	12,000
Pharmacy Plus	0	2,064
Pharmacy Only	0	740
Alcohol + Cannabis	1,566	2,513
Personal Goods	991	24,470
Other Convenience Retail	0	11,180
Comparison Goods	**10,270**	**46,397**
Accessories	2,500	5,793
Clothing	1,525	16,819
Hardware / Garden Store	2,457	0
General Merchandise	2,084	11,601
Home Goods	713	7,985
Sporting Goods	0	0
Art Goods	991	4,199
Automotive Goods	0	0
Food & Beverage	**7,207**	**45,102**
Fast Food	0	7,251
Restaurant	7,207	26,010
Café & Specialty	0	11,841
Service Commercial	**23,220**	**107,135**
Personal Services	7,088	21,605
Professional Services	11,540	60,153
Automotive Services	0	3,016
Community Services	0	2,612
Office Services	4,592	11,658
Fitness / Recreation Services	0	8,092
Vacant	**2,118**	**27,342**
Vacant	2,118	27,342
Vacant Under Construction	0	0
Institutional (Non-retail)	0	**0**

Total – All Categories	**47,232**	**333,098**
Total – All Categories Excluding Non-Retail Institutional	**47,232**	**333,098**
Total – Occupied Retail and Service Commercial	**45,114**	**305,757**

Area Characteristics

The Mackenzie and West 41st Avenue Village is characterised by single-detached dwellings, forming a predominantly residential community anchored by an elementary school. While the village itself has limited retail offerings, it benefits from close proximity to a wide range of retail establishments in the nearby Kerrisdale and South Dunbar neighbourhoods.

Socio-Demographic Profile

The socio-demographic profile of the area is characterized by a notably higher-than-average proportion of larger households, including 3, 4, and 5+ person households. The average household size in the village is 2.7, compared to the city-wide average of 2.3. Additionally, the area has a significantly higher percentage of owner-occupied households, with 74% of homes owned compared to the city-wide average of 46%, reflecting a stable, long-term residential community.

	Village	City-Wide
Population (2021)	3,299	662,263
Total Households	1,235	305.026
1-person household	315 (26%)	119,510 (39%)
2-person household	395 (32%)	100,690 (33%)
3-person household	215 (17%)	38,685 (13%)
4-person household	195 (16%)	29,125 (10%)
5+ person household	115 (9%)	17,100 (6%)
Average Household Size	2.7	2.3
Median Household Income	$112,000	$89,8762
Owner Households	74%	46%
Renter Households	26%	54%

Latent Incremental Opportunity

Initial modelling suggests there is latent demand to support up to 20,000 square feet of new retail floor area at this node, including 5,000 square feet of retail grocery. However, the initial modelling results may overstate true demand here given the relatively higher incomes of the surrounding population and model bias towards proximity. Residents in this Village are relatively well served today by retail grocery offerings on Dunbar, at Mackenzie & 33rd, and in Kerrisdale, although these all fall outside of a comfortable walking distance for day-to-day convenience. A convenience store or destination specialty food store may be supportable at this location.

Retail Expansion Opportunities

There is likely limited opportunity or need for substantial retail (including grocery) at this node, given proximity to 41st & Dunbar, Kerrisdale, and 33rd & Mackenzie. Future redevelopment with retail frontage along West 41st would be challenging, given street parking restrictions. Further, any future grocery offerings at this node would likely compromise the potential for expanded retail grocery at 33rd & Mackenzie. This commentary should be re-visited following completion of future demand projections.

Mackenzie & West 41st SWOC Analysis

Strengths	Weaknesses
• Close to Kerrisdale elementary school • Existing longstanding service node at corner of Carnarvon and W. 41st Ave • 41st is a primary arterial road, with express bus service. It is a major route to UBC.	• Lack of any retail offerings of note today. • Just blocks away from the Save On and H Mart store at 41st and Dunbar
Opportunities	**Challenges**
• Office / Professional / Personal service uses. • Emphasize non- grocery uses so as to complement rather than compete with 33rd & MacKenzie. • Clustering in Kerrisdale or Save On and H Mart store at 41st and Dunbar largely meets the current needs effectively.	• Equidistant between retail at 41st & Dunbar, and Kerrisdale. Limits opportunity for expansion. • Too close to Save On and H Mart on Dunbar

4.2.5 GRANVILE STREET & WEST 41ST AVENUE

Village Boundaries

The Granville Street and West 41st Avenue Village is centred on Granville Street and West 41st Avenue. It is bounded by West 37th Avenue to the north, Selkirk Street to the east, West 45th Avenue to the south, and Angus Drive to the west.

Figure 7 Boundaries of Mackenzie and West 41st Village

Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The Granville Street and West 41st Avenue Village features low-rise retail buildings. The area includes two gas station sites and a low-density bank site, with the majority of the retail space dedicated to service commercial uses and restaurants. This creates a service-oriented environment, though there is limited variety in grocery offerings.

Table 13 Retail Floor Area Statistics by Retail Categories Within Village Node, Granville Street & West 41st Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	4,310	9.7%
Supermarket	0	0.0%
Grocer & Produce		2.3%
Specialty Grocery	0	0.0%
Convenience Store	3,310	7.5%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	1,000	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	0	0.0%
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	8,000	18.1%
Fast Food	0	0.0%
Restaurant	8,000	18.1%
Café & Specialty	0	0.0%
Service Commercial	24,605	55.5%
Personal Services	4,700	10.6%
Professional Services	8,370	18.9%
Automotive Services	10,035	22.6%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	1,500	3.4%
Vacant	7,400	16.7%
Vacant	7,400	16.7%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	0	0.0%
Total – All Categories	**44,315**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**44,315**	**100.0%**
Total – Occupied Retail and Service Commercial	**36,915**	**83.3%**

Retail Proximity

There is no additional retail within 800 metres of the Village core. However, significant retail offerings can be found within 1,200 metres of the village, though supermarket and grocery options are limited.

Table 14 Retail Floor Area Statistics by Retail Categories Outside Village Node, Granville Street & West 41st Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq. ft), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**49,362**
Supermarket	0	0
Grocer & Produce	0	629
Specialty Grocery	0	0
Convenience Store	0	2,436
Other Food Retail	0	2,768
Pharmacy – Full Retail Mix	0	32,262
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	6,730
Personal Goods	0	3,537
Other Convenience Retail	0	1,000
Comparison Goods	**0**	**22,183**
Accessories	0	837
Clothing	0	5,140
Hardware / Garden Store	0	0
General Merchandise	0	5,820
Home Goods	0	7,336
Sporting Goods	0	0
Art Goods	0	3,050
Automotive Goods	0	0
Food & Beverage	**0**	**22,422**
Fast Food	0	5,108
Restaurant	0	11,521
Café & Specialty	0	5,793
Service Commercial	**0**	**43,776**
Personal Services	0	8,697
Professional Services	0	27,467
Automotive Services	0	3,016
Community Services	0	0
Office Services	0	4,596
Fitness / Recreation Services	0	0
Vacant	**0**	**10,971**
Vacant	0	9,115
Vacant Under Construction	0	1,856
Institutional (Non-retail)	**0**	**0**

Total – All Categories	**0**	**148,714**
Total – All Categories Excluding Non-Retail Institutional	**0**	**148,714**
Total – Occupied Retail and Service Commercial	**0**	**137,743**

Area Characteristics

The Granville Street and West 41st Avenue Village is divided by two major arterial roads, making pedestrian access and safety more difficult. Current retail is located along these busy roads, offering high visibility. There is also a lack of sufficient parking, which can limit accessibility for visitors. While the area benefits from its location, the heavy traffic and limited parking create challenges for both pedestrians and drivers.

Socio-Demographic Profile

The socio-demographic profile of the Granville Street and West 41st Avenue Village shows a significantly higher percentage of owner-occupied households, with 86% of homes owned compared to the city-wide average of 46%. The village also has a higher proportion of larger households, with more 3, 4, and 5+ person households. The average household size in the village is 3.0, compared to the city-wide average of 2.3. Additionally, the median household income in the village is 53% higher than the city-wide figure, reflecting a more affluent population.

	Village	City-Wide
Population (2021)	2,327	662,263
Total Households	775	305.026
1-person household	130 (17%)	119,510 (39%)
2-person household	245 (32%)	100,690 (33%)
3-person household	140 (18%)	38,685 (13%)
4-person household	135 (17%)	29,125 (10%)
5+ person household	130 (17%)	17,100 (6%)
Average Household Size	3.0	2.3
Median Household Income	$137,800	$89,8762
Owner Households	86%	46%
Renter Households	14%	54%

Latent Incremental Opportunity

Modelling suggests there is latent opportunity at this node for 30-60,000 square feet of retail expansion. This includes retail grocery opportunity of about 14,000-20,000 square feet.

Retail Expansion Opportunities

Depending on the extent of population growth in the immediate Village trade area, there may be potential to expand the southwest and northwest portions of this '4-corner' precinct as part of future site redevelopment. This will be a challenging area to push retail off of the major arterials, given the high cost of land assembly likely posing a high barrier to redevelopment. The question of the placement and extent of off-arterial retail will need to be re-visited following completion of retail demand projections, particularly if population forecasts begin to identify which areas within the Village are more or less likely to be redevelopment sites and thus sites where future retail may emerge in mixed-use formats.

Granville & West 41st SWOC Analysis

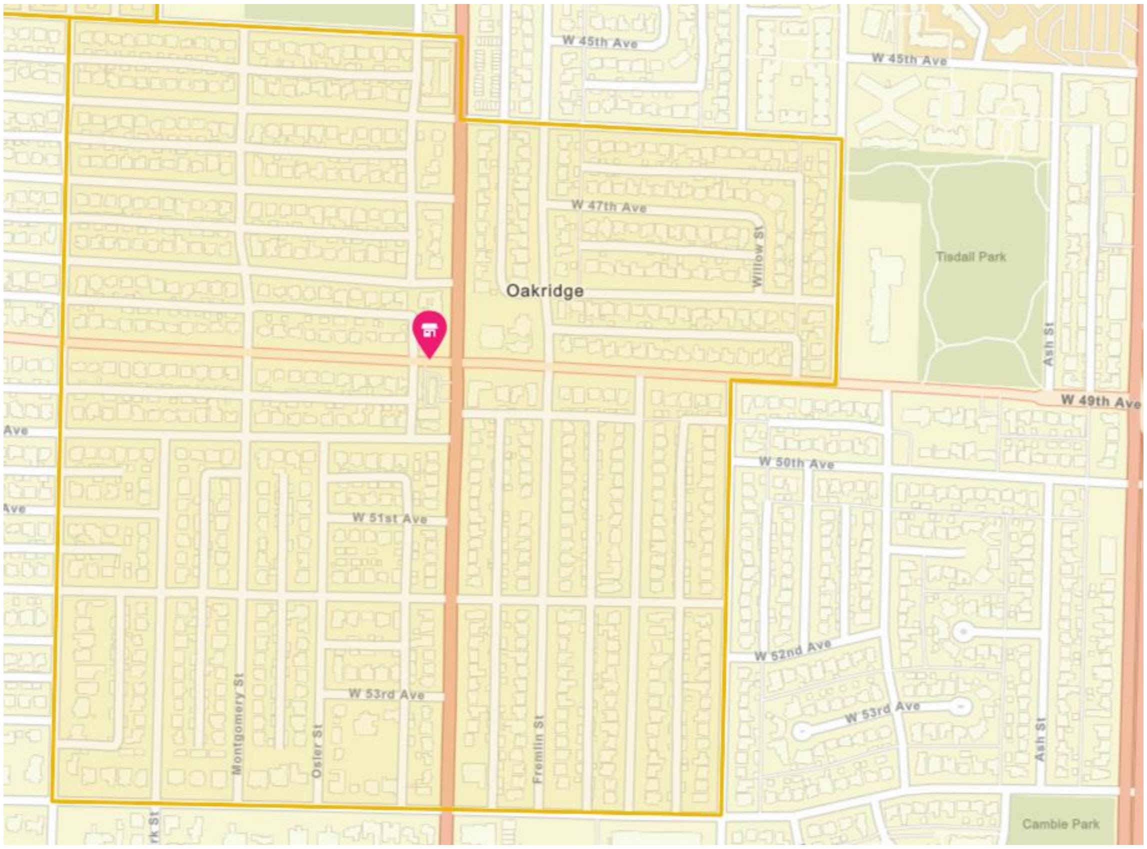
Strengths	Weaknesses
• Very good visibility and high profile • The south-west corner of Granville and West 41st Avenue has a number of destination restaurants as well as Scotiabank at 1576 West 41st Avenue. • The Royal Bank at 5688 Granville Street anchors the north-east corner of the intersection. • The north-west corner of the intersection is anchored by Granville Toyota's Service Centre and a Shell Gas Station with a **convenience** food concession	• No clear area of concentration; area is disjointed form a retail standpoint, bisected by two major arterial roads. • Parking is challenging; southwest corner once had a convenience store, now occupied by a realty office. Reason for vacating was, in part, lack of parking. • 4 separate nodes separated by two wide arterial roads.
Opportunities	**Challenges**
• Automotive service and repair • This area should continue to be service convenience-oriented, rather than competing with the precinct at 41st & East Boulevard • Two gas station sites and low-density bank site with surface parking are all future redevelopment / intensification opportunities. • Expansion opportunities on low density sites (southwest, northwest corners) are the main opportunities. Southwest corner likely has the greater near-term opportunity, given sidewalk width, available parking, and infill opportunity at the Scotiabank site. • Convenience opportunities serving customers who do not want the hassle of trying to park and get to the Safeway store in Oakridge once the regional shopping centre is finished. • Possible future opportunity for off-arterial retail, however extent of opportunity and future configuration still unknown, and dependent on population growth and lot consolidations.	• Limited range of commercial uses that can operate in this type of environment, given challenges creating connections between the 4-nodes separated by two wide arterials.

4.2.6 OAK STREET & WEST 49TH AVENUE

Village Boundaries

The Oak Street and West 49th Avenue Village is centred on Oak Street and West 49th Avenue. It is bounded by West 45th Avenue to the north, Tisdall Street to the east, West 54th Avenue to the south, and Hudson Street to the west.

Figure 8 Boundaries of Oak Street and West 49th Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Currently, retail in the Oak Street and West 49th Avenue Village is clustered around the Oak Street and 49th Avenue intersection. Retail is located on the west side of the street in a 350-foot strip and includes a gas station and convenience store, along with a strip mall featuring a Tim Hortons, A&W, sushi restaurant, insurance office, Subway, and Domino's.

Table 15 Retail Floor Area Statistics by Retail Categories Within Village Node, Oak Street & West 49th Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**1,000**	**5.0%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	1,000	5.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**6,210**	**31.1%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	6,210	31.1%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**11,567**	**57.9%**
Fast Food	7,067	35.4%
Restaurant	2,500	12.5%
Café & Specialty	2,000	10.0%
Service Commercial	**1,200**	**6.0%**
Personal Services	0	0.0%
Professional Services	1,200	6.0%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**19,977**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**19,977**	**100.0%**
Total – Occupied Retail and Service Commercial	**19,977**	**100.0%**

Retail Proximity

Currently, this Village has no additional offerings within 800 metres of its core. Access to additional grocery retail is limited to convenience stores within 1,200 metres.

Table 16 Retail Floor Area Statistics by Retail Categories Outside Village Node, Oak Street & West 49th Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**1,595**
Supermarket	0	0
Grocer & Produce	0	0
Specialty Grocery	0	0
Convenience Store	0	1,595
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	0
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**0**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	0
Home Goods	0	0
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**2,000**
Fast Food	0	0
Restaurant	0	0
Café & Specialty	0	2,000
Service Commercial	**0**	**9,016**
Personal Services	0	3,600
Professional Services	0	2,400
Automotive Services	0	3,016
Community Services	0	0
Office Services	0	0
Fitness / Recreation Services	0	0
Vacant	**0**	**0**
Vacant	0	0
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**0**

Total – All Categories	**0**	**12,611**
Total – All Categories Excluding Non-Retail Institutional	**0**	**12,611**
Total – Occupied Retail and Service Commercial	**0**	**12,611**

Area Characteristics

The retail shopping area is situated on a busy road, making it a high-traffic location. This increases ease of access for those using a car, but the public realm does not appeal to pedestrians. This is a hybrid retail area, serving both nearby residents and commuters.

There are two large church properties on the northeast and southeast corners, both of which are likely future opportunity sites for larger-scale mixed-use projects. The gas station at the southwest corner is also a likely future mixed-use redevelopment opportunity.

The northwest corner today operates as a successful strip centre that functions well in serving commuters.

Historically, the neighbourhood strip centre format was well-suited to this location, effectively capturing traffic from Oak Street as it transitions from the freeway towards the city centre. Redeveloping the site without maintaining at least some surface parking could diminish the functionality of this node, from the perspective of commuters.

Socio-Demographic Profile

The socio-demographic profile of the Oak Street and West 49th Avenue Village is characterized by a significantly higher proportion of larger households, including 3, 4, and 5-person households, with an average household size of 3.0 compared to the city-wide average of 2.3. Additionally, the median household income in this area is 20% higher than the city-wide figure, reflecting a prosperous and family-oriented community.

	Village	**City-Wide**
Population (2021)	3,085	662,263
Total Households	1,015	305.026
1-person household	180 (18%)	119,510 (39%)
2-person household	280 (28%)	100,690 (33%)
3-person household	195 (19%)	38,685 (13%)
4-person household	185 (18%)	29,125 (10%)
5+ person household	175 (17%)	17,100 (6%)
Average Household Size	3.0	2.3
Median Household Income	$108,143	$89,8762
Owner Households	69%	46%
Renter Households	31%	54%

Latent Incremental Opportunity

Modelling suggests that there is latent opportunity for 30-50,000 square feet of additional retail floor area in this Village today. This includes about 7,000-18,000 square feet for retail grocery / convenience, 2,000-6,000 square feet of pharmacy, and the balance for services and restaurant food and beverage.

Retail Expansion Opportunities

Oak and 49th is serving a hybrid market – both the local residents (current and future) plus the pass-by traffic heading into and out of the heart of the City. Cyclone Taylor remains a major destination at this node. As noted above, there is already opportunity here for convenience grocery expansion (currently a market served only by the Smartstop 24/7). The extent of future retail grocery opportunity at this site will be dependent on both timing and extent of future retail grocery plans at the Oakridge Transit Centre site (Oak & 41st), and possibly at the redevelopment on the west side of Oak Street immediately south of 41st Avenue.

Soft sites within the Village where there is likely redevelopment potential, and where future retail opportunity could be accommodated, include:

- Unitarian church site at northeast corner of 49th and Oak
- Lutheran church site at southeast corner of 49th and Oak
- Future redevelopment / intensification at southwest corner

Future retailers would likely prefer to have visibility on to Oak Street vs. on West 49th Avenue, however like at Granville & W. 41st, there may be off-arterial opportunity depending on the extent and location of projected redevelopment.

Oak & West 49th Avenue SWOC Analysis

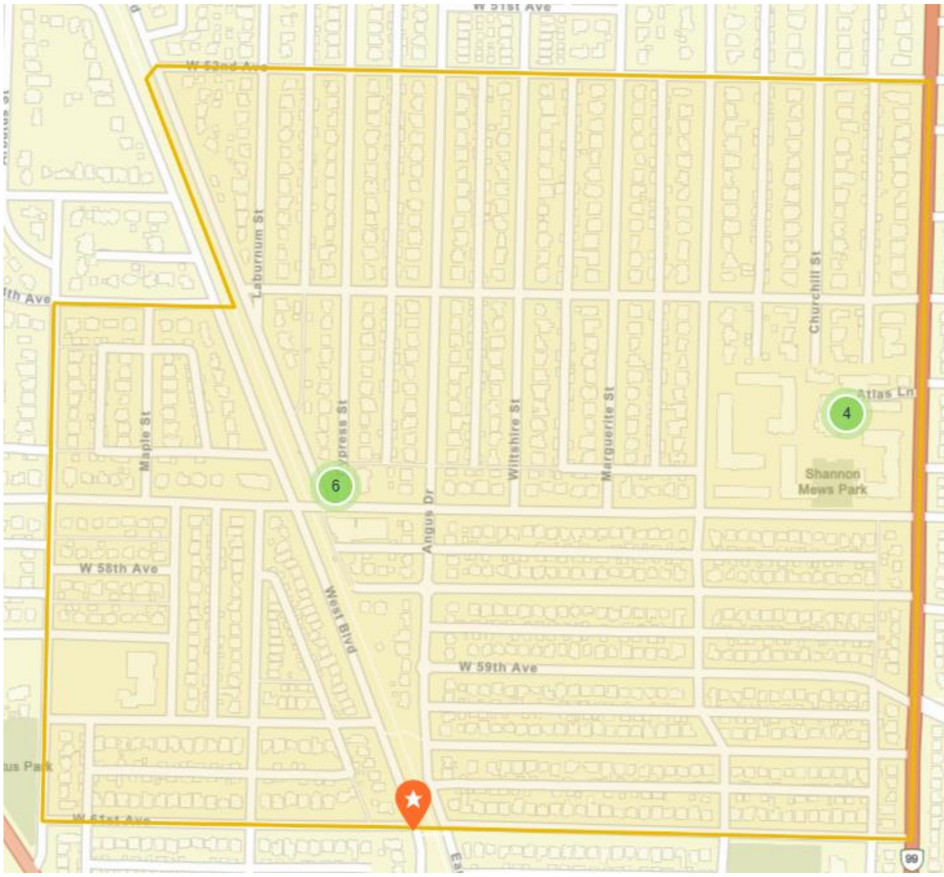
Strengths	Weaknesses
• High visibility neighbourhood strip shopping centre on northwest corner (built in 1980). • The south-west corner has a gas station with convenience offerings and Cyclone Taylor hockey equipment and figure skating which is a destination sporting goods store for the entire lower mainland. • Convenience uses at this location have benefited from very good visibility and access / parking with the strip centre configuration parking directly in front of the CRUs	• There was a Mac's Convenience Store at 6491 Oak Street which closed and was replaced by an A&W Restaurant • Elimination of surface parking in these outdated strip centre formats (similar to what has occurred on Dunbar in recent years would change the access / egress and detract from the vehicular appeal of this corner. • Retail loaded on opposite corners of two major arterial streets.
Opportunities	**Challenges**
• Future development/redevelopment here would benefit from same high visibility and likely attract similar convenience service tenant mix. • The recommended block for redevelopment for **future commercial use is the 6500 block of Oak Street** on the west side of the street. This currently includes Gas Station, Cyclone Taylor, an older single-family home. • The portion of the 6400 block Oak with the 1980's neighbourhood strip centre would not expand beyond its current footprint. • The north-east and south-east corners of 49th & Oak Street could be retained for institutional use; however, they do present likely future redevelopment opportunities (based on past experience of other church sites in the city).	• Built form of the neighbourhood strip centre with parking between the storefronts and the sidewalk which suits the convenience needs of the passing vehicular traffic but not pedestrian friendly. • Redevelopment of the 14-acre site which was previously the Oakridge Transit Centre at 41st and Oak Street will include approximately 24,000 square feet of commercial Space will have an impact on future commercial offerings for this Village.

4.2.7 ANGUS DRIVE & WEST 57TH AVENUE

Village Boundaries

The Angus Drive and West 57th Avenue Village is centred on Angus Drive and West 57th Avenue. It is bounded by West 52nd Avenue to the north, Granville Street to the east, West 61st Avenue to the south, and Arbutus Street to the west.

Figure 9 Boundaries of Angus Drive and West 57th Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Retail in the Angus Drive and West 57th Avenue Village is concentrated at the intersection of 57th and West Blvd. A mixed-use building on the south side of 57th has retail on the ground floor and apartments on the second floor. The building has a 5,700 square foot Choices Market along with restaurants and service commercial.

Table 17 Retail Floor Area Statistics by Retail Categories Within Village Node, Angus Drive & West 57th Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**5,700**	**24.6%**
Supermarket	5,700	24.6%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**3,415**	**14.7%**
Accessories	1,984	8.5%
Clothing	1,431	6.2%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**3,293**	**14.2%**
Fast Food	0	0.0%
Restaurant	1,681	7.2%
Café & Specialty	1,613	6.9%
Service Commercial	**10,806**	**46.5%**
Personal Services	6,484	27.9%
Professional Services	4,322	18.6%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**23,215**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**23,215**	**100.0%**
Total – Occupied Retail and Service Commercial	**23,215**	**100.0%**

Retail Proximity

Currently, this Village has no additional grocery offerings within 800 metres of its core. There are also limited grocery retail options within 1,200 metres of the Village.

Table 18 Retail Floor Area Statistics by Retail Categories Outside Village Node, Angus Drive & West 49th Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**3,253**
Supermarket	0	0
Grocer & Produce	0	0
Specialty Grocery	0	1,053
Convenience Store	0	0
Other Food Retail	0	2,200
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	0
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**920**
Accessories	0	0
Clothing	0	920
Hardware / Garden Store	0	0
General Merchandise	0	0
Home Goods	0	0
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**0**
Fast Food	0	0
Restaurant	0	0
Café & Specialty	0	0
Service Commercial	**0**	**16,665**
Personal Services	0	3,773
Professional Services	0	11,992
Automotive Services	0	0
Community Services	0	0
Office Services	0	900
Fitness / Recreation Services	0	0
Vacant	**0**	**3,301**
Vacant	0	3,301
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**0**

Total – All Categories	**0**	**24,138**
Total – All Categories Excluding Non-Retail Institutional	**0**	**24,138**
Total – Occupied Retail and Service Commercial	**0**	**20,838**

Area Characteristics

Located along the Greenway, the public realm is enriched with greenery and a pleasant environment, making it a desirable area for residents and offering multi-modal access for pedestrians and cyclists to access the retail grocery anchor within the Village.

Socio-Demographic Profile

The socio-demographic profile of the Angus Drive and West 57th Avenue Village is characterized by a higher percentage of owner-occupied households, with 64% of homes owned compared to the city-wide average of 46%. The area also has a larger proportion of 3, 4, and 5+ person households, reflecting its appeal to families. Additionally, the median household income in the village is 20% higher than the city-wide average.

	Village	City-Wide
Population (2021)	3,113	662,263
Total Households	1,285	305.026
1-person household	335 (26%)	119,510 (39%)
2-person household	465 (36%)	100,690 (33%)
3-person household	225 (18%)	38,685 (13%)
4-person household	150 (12%)	29,125 (10%)
5+ person household	105 (8%)	17,100 (6%)
Average Household Size	2.7	2.3
Median Household Income	$108,000	$89,8762
Owner Households	64%	46%
Renter Households	37%	54%

Latent Incremental Opportunity

Modelling suggests there is opportunity to double the size of this retail node. This includes an additional 4-6,000 square feet of retail grocery / convenience store expansion potential, plus about 2-3,000 square feet of pharmacy expansion potential. The likely reality at this node is that the Choices Market achieves much higher sales per square foot than the modelling assumes, and therefore the true extent of expansion opportunity today may be lower than suggested by initial modelling.

Retail Expansion Opportunities

Future retail should be concentrated on the block between East Boulevard and Angus Drive. There may also be opportunity for infill as part of future redevelopment on the north side of West 57th at the Anglican church site. The area is well anchored from a grocery standpoint, and there may be opportunity for expansion. Proximity of a large Save-On foods at West 49th likely limits the expansion opportunity at this node. Opportunity for expansion will be driven by both local population growth, and by the Village's position vis-à-vis the Arbutus Greenway, which already funnels considerable traffic into the area.

Angus & West 57th Avenue SWOC Analysis

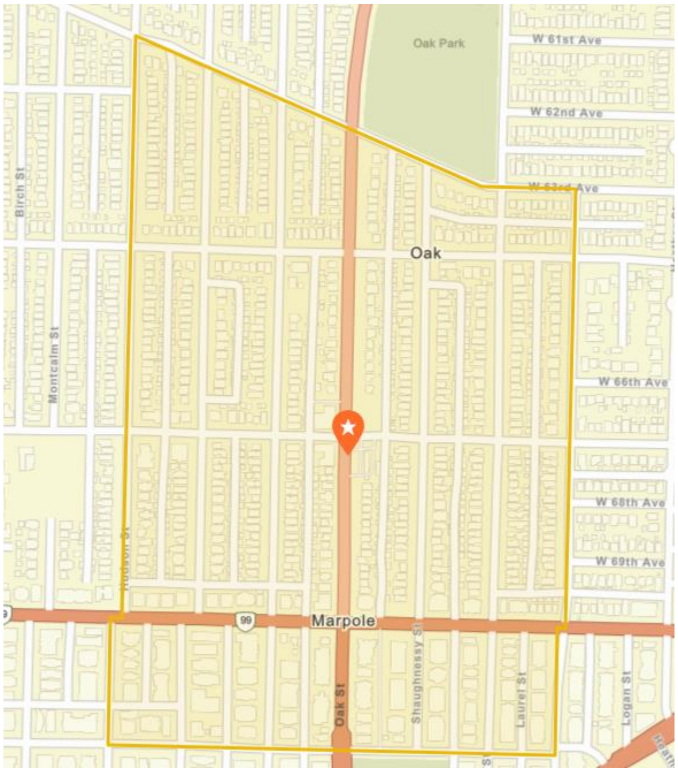
Strengths	Weaknesses
• Has a retail grocery anchor (Choices Market at 1888 West 57th Avenue) that is successful. • Unique character of the area with clearly defined edges (1-block strip – 1800 block) • Area residents also well served by nearby Save-On Foods at 49th and West Boulevard	• Street configuration is not conducive to double-loaded retail. • Other uses do not currently take advantage of the retail grocery anchor.
Opportunities	**Challenges**
• Leverage Arbutus Greenway, which funnels customers to this node. • Concentrate retail on one block between East Boulevard and Angus Drive • Opportunity for infill as part of future redevelopment on north side of West 57th • The owners of Choices (Loblaws) should be contacted to determine if this store is undersized – and if there is an opportunity for future expansion of this store.	• Large Save-On Foods on W. 49th limits future expansion opportunity in the grocery sector • Potential challenges with finding financially viable lots for redevelopment with commercial floor area.

4.2.8 OAK STREET AND WEST 67TH AVENUE

Village Boundaries

The Oak Street and West 67th Avenue Village is centred on Oak Street and West 67th Avenue. It is bounded by Park Drive to the north, Laurel Street to the east, West 71st Avenue to the south, and Hudson Street to the west.

Figure 10 Boundaries of Oak Street and West 67th Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Currently, retail in the Oak Street and West 67th Avenue Village is concentrated around the intersection of Oak Street and West 67th Avenue, primarily on the west side of Oak Street. The area features two strip malls, offering a mix of service-commercial businesses and restaurants. Notable establishments include a gas station, as well as a variety of food and beverage options and service-commercial businesses. The grocery retail in the Village is limited to convenience retail options.

Table 19 Retail Floor Area Statistics by Retail Categories Within Village Node, Oak Street & West 67th Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**3,700**	**13.7%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	2,500	9.2%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	1,200	4.4%
Comparison Goods	**2,500**	**9.2%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	2,500	9.2%
Automotive Goods	0	0.0%
Food & Beverage	**7,000**	**25.8%**
Fast Food	1,000	3.7%
Restaurant	6,000	22.2%
Café & Specialty	0	0.0%
Service Commercial	**9,088**	**33.5%**
Personal Services	4,500	16.6%
Professional Services	4,588	16.9%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**4,800**	**17.7%**
Vacant	4,800	17.7%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**27,088**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**27,088**	**100.0%**
Total – Occupied Retail and Service Commercial	**22,288**	**82.3%**

Retail Proximity

Currently, this Village has no additional grocery offerings within 800 metres of its core. However, there is significant grocery retail within 1,200 metres of the Village, including the Marpole Safeway.

Table 20 Retail Floor Area Statistics by Retail Categories Outside Village Node, Oak Street & West 67th Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq. ft), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**61,763**
Supermarket	0	0
Grocer & Produce	0	36,225
Specialty Grocery	0	1,053
Convenience Store	0	2,500
Other Food Retail	0	2,900
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	1,489
Pharmacy Only	0	1,935
Alcohol + Cannabis	0	11,361
Personal Goods	0	1,056
Other Convenience Retail	0	3,244
Comparison Goods	**4,187**	**7,749**
Accessories	0	2,574
Clothing	0	920
Hardware / Garden Store	0	0
General Merchandise	4,187	0
Home Goods	0	0
Sporting Goods	0	1,755
Art Goods	0	2,500
Automotive Goods	0	0
Food & Beverage	**12,306**	**40,764**
Fast Food	0	12,821
Restaurant	9,060	23,924
Café & Specialty	3,246	4,019
Service Commercial	**15,780**	**96,799**
Personal Services	1,775	25,537
Professional Services	11,505	61,639
Automotive Services	2,500	5,000
Community Services	0	0
Office Services	0	2,234
Fitness / Recreation Services	0	2,390
Vacant	**6,345**	**18,502**
Vacant	6,345	17,375
Vacant Under Construction	0	1,127
Institutional (Non-retail)	**4,642**	**0**

Total – All Categories	**43,260**	**225,577**
Total – All Categories Excluding Non-Retail Institutional	**43,260**	**225,577**
Total – Occupied Retail and Service Commercial	**32,273**	**207,075**

Area Characteristics

Retail in the Oak Street and West 67th Avenue Village is located along a busy main road with a high volume of traffic, making it a highly accessible area for drivers. The retail offerings are concentrated in single-story, older buildings, typical of a more traditional strip mall format. While there is some off-street parking available, the area is not particularly inviting for pedestrians, with the street environment lacking features that encourage foot traffic or walkability. There is likely near-term retail grocery opportunity in this area.

One of the current challenges here is related to placement of Oak Street pedestrian crossing locations in relation to locations of current and future retail.

Socio-Demographic Profile

The socio-demographic profile of the Oak Street and West 67th Avenue Village is characterised by a median household income that is 22% lower than the city-wide average. The household composition in the village mirrors that of the city as a whole, with no significant differences. However, the village has a slightly higher percentage of renter households, with 58% of households renting compared to the city-wide average of 54%.

	Village	City-Wide
Population (2021)	4,601	662,263
Total Households	2,095	305.026
1-person household	805 (38%)	119,510 (39%)
2-person household	625 (30%)	100,690 (33%)
3-person household	335 (16%)	38,685 (13%)
4-person household	220 (11%)	29,125 (10%)
5+ person household	120 (6%)	17,100 (6%)
Average Household Size	2.3	2.3
Median Household Income	$73,511	$89,8762
Owner Households	41%	46%
Renter Households	58%	54%

Latent Incremental Opportunity

Initial draft modelling suggests there is opportunity to at least double the floor area of this node. This includes 10-15,000 square feet of retail grocery / convenience, 1,500-2,500 square feet of pharmacy, 2,000-4,000 square feet for liquor store, and the balance for a variety of personal and professional services and food & beverage.

Retail Expansion Opportunities

There is some immediate grocery opportunity expansion potential at this location, at a scale that would complement the nearby larger Safeway store in Marpole, and the T&T supermarket at Marine Gateway.

There has been commentary about deficient pedestrian crossings across Oak Street in this area. There is likely opportunity to extend off-arterial neighbourhood-focused retail along West 67th, to the west side of Oak Street.

Oak & West 67th Avenue SWOC Analysis

Strengths	Weaknesses
• Oak street is a busy arterial, providing existing food and service businesses with great visibility and profile. • With new construction on east side of the street, area is now seeing double-loaded retail emerge. • There is a preliminary public art plan which has been submitted to the City on behalf of Enrich Developments for the redevelopment of 8029-8225 Oak Street DP-2023-00474 which will include approximately 35,000 square feet of new commercial floor area. • Non-retail anchor in Marpole Oakridge Community Centre (Oak & 59th)	• Street width and high volume of traffic on Oak Street makes it hard to create a local area shopping dynamic. • This commercial precinct needs additional Oak street traffic crossings according to interviewees, to improve pedestrian flow between both sides of Oak Street
Opportunities	**Challenges**

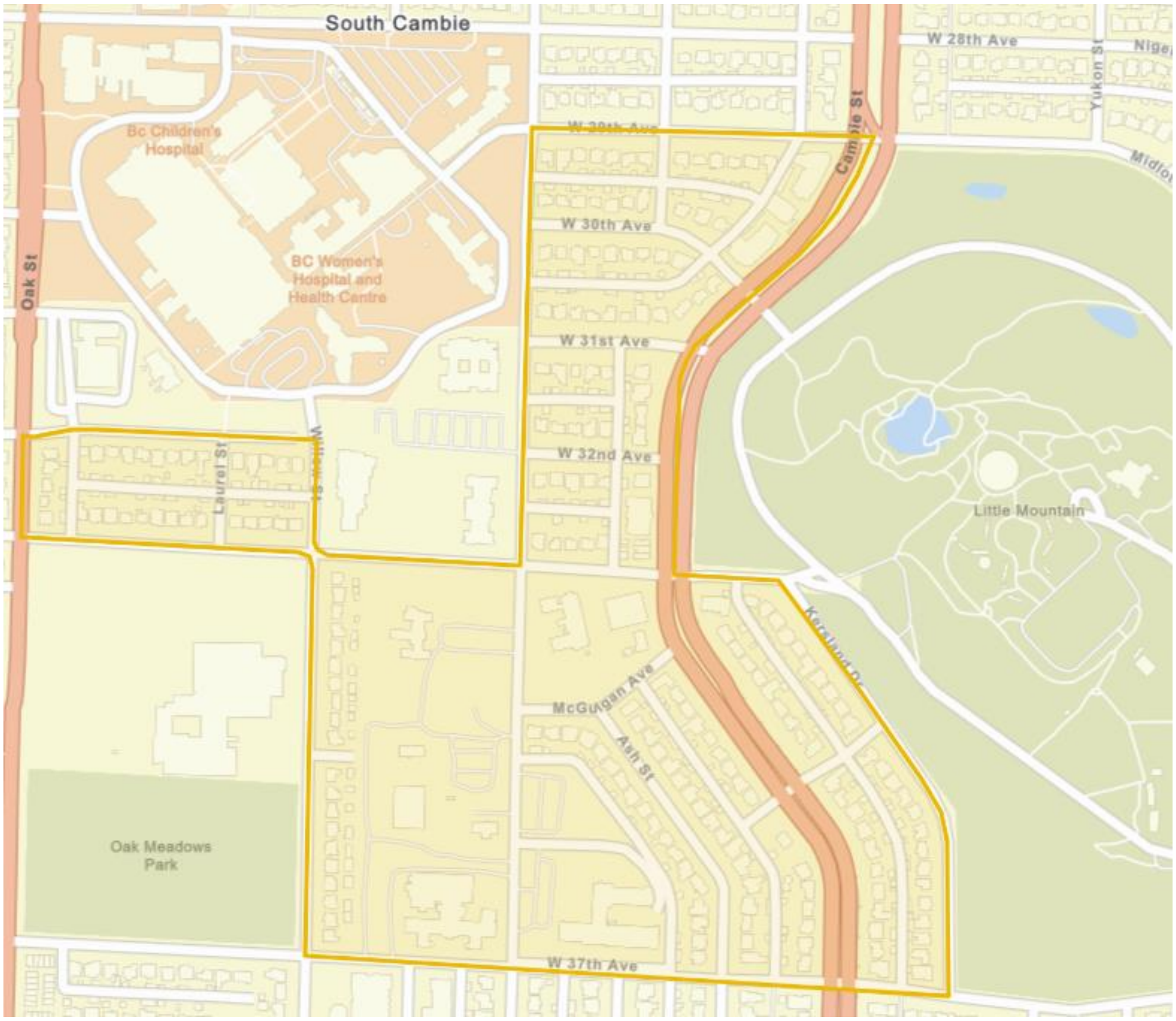
• The highlights of the City of Vancouver's plan for Oak Street include:
  o Enhancing West 67th Avenue and Oak Street as a local shopping area
  o Introducing more housing types along Oak Street
  o Creating safer pedestrian crossings for Oak Street
• Continued opportunity for food and service uses on the west side of the street) with great visibility and profile.
• Likely opportunity for retail expansion along West 67th, west of Oak Street.
	• Street width and high-volume vehicular traffic on Oak Street makes it hard to create a local area shopping dynamic
	• Existing Safeway Store at Granville & 70th and T&T Supermarket at Marine Gateway at 458 SW Marine Drive
	• Parking on Oak Street

4.2.9 HEATHER STREET & WEST 33RD AVENUE

Village Boundaries

The Heather Street and West 33rd Avenue Village is centred on Heather Street and West 33rd Avenue. It is bounded by West 29th Avenue to the north, Kersland Drive to the east, West 37th Avenue to the south, and Oak Street to the west.

Figure 11 Boundaries of Heather Street and West 33rd Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The current retail mix in the Heather Street and West 33rd Avenue Village is minimal, with only 664 square feet of retail space across the entire village. The primary retail offering is a coffee shop located on the ground floor of an apartment building.

Table 21 Retail Floor Area Statistics by Retail Categories Within Village Node, Heather Street & West 33rd Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**0**	**0.0%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**0**	**0.0%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**664**	**100.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	664	100.0%
Service Commercial	**0**	**0.0%**
Personal Services	0	0.0%
Professional Services	0	0.0%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	0	0.0%

Total – All Categories	**664**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**664**	**100.0%**
Total – Occupied Retail and Service Commercial	**664**	**100.0%**

Retail Proximity

The Heather Street and West 33rd Avenue Village has limited grocery retail options. There are no grocery stores within 800 metres of the Village, and only minimal grocery offerings, mainly at convenience stores, available within a 1,200-metre radius. However, the area benefits from its proximity to Main Street, which offers a wider variety of retail and grocery stores.

Table 22 Retail Floor Area Statistics by Retail Categories Outside Village Node, Heather Street & West 33rd Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq. ft), 800 - 1,200 Metres (m)
Convenience Goods	**4,858**	**5,438**
Supermarket	0	0
Grocer & Produce	0	0
Specialty Grocery	0	0
Convenience Store	0	2,413
Other Food Retail	0	1,296
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	647
Pharmacy Only	0	0
Alcohol + Cannabis	4,858	1,081
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**2,798**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	0
Home Goods	0	2,798
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**3,197**
Fast Food	0	0
Restaurant	0	1,750
Café & Specialty	0	1,447
Service Commercial	**0**	**22,652**
Personal Services	0	0
Professional Services	0	14,647

Automotive Services	0	3,016
Community Services	0	0
Office Services	0	3,885
Fitness / Recreation Services	0	1,104
Vacant	**0**	**6,410**
Vacant	0	6,410
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**2,542**
Total – All Categories	**4,858**	**43,037**
Total – All Categories Excluding Non-Retail Institutional	**4,858**	**43,037**
Total – Occupied Retail and Service Commercial	**4,858**	**34,085**

Area Characteristics

The Heather Street and West 33rd Avenue Village is currently marked by limited retail offerings. However, its location offers significant potential, with proximity to the BC Women's Hospital and BC Children's Hospital, both just outside the village, providing key healthcare services. Additionally, Queen Elizabeth Park, a major public green space, is within 750 metres, offering recreational opportunities and scenic views. The area is in the early stages of transformation, with the redevelopment of the Heather Lands, an 8.5-hectare site located between West 33rd Avenue and West 37th Avenue at Heather Street underway. The master-planned redevelopment proposes buildings ranging from 3 to 28 storeys, which will include a mix of residential, office, and retail spaces, as well as a childcare facility, school, park, public open space, and a cultural centre. This project will re-shape the Village.

Socio-Demographic Profile

The socio-demographic profile of the Heather Street and West 33rd Avenue Village is characterised by a higher percentage of owner-occupied households, with 62% of homes owned compared to the city-wide average of 46%. The household size in the village is similar to the city average, and the median household income aligns closely with the broader city-wide figure.

	Village	City-Wide
Population (2021)	3,313	662,263
Total Households	1,360	305.026
1-person household	440 (32%)	119,510 (39%)
2-person household	465 (34%)	100,690 (33%)
3-person household	220 (16%)	38,685 (13%)
4-person household	135 (10%)	29,125 (10%)
5+ person household	100 (7%)	17,100 (6%)
Average Household Size	2.4	2.3
Median Household Income	$89,667	$89,8762
Owner Households	62%	46%
Renter Households	38%	54%

Latent Incremental Opportunity

Modelling suggests that there is about 30-40,000 square feet of latent incremental opportunity at this node today. This includes 10-15,000 square feet of retail grocery / convenience store demand.

Retail Expansion Opportunities

Future retail opportunity at this node should focus on consolidating retail in one location, and ensuring some profile on to West 33rd Avenue. Presently there is a lack of retail – across all categories – along the Cambie corridor. There is likely significant opportunity for convenience retail in this Village, including pharmacy, retail grocery, and health services, given the site's distance from major retail grocery stores (King Edward & Oak, and Oakridge Park).

Heather & West 33rd Avenue SWOC Analysis

Strengths	Weaknesses
• New development / density – primarily the Canada Lands / MST site – will drive future retail opportunity. • There is latent retail opportunity in the area, as shown in the Cambie Street retail study.	• Many sites in the area have redeveloped in last decade, leaving few new sites (outside of master planned area) for new retail.
Opportunities	**Challenges**
• Placement of commercial uses and visibility from major roads will be key to future retail viability. Must have visibility on to West 33rd.	• Finding appropriate locations with good visibility will be a challenge. Lower visibility locations will have challenges attracting sufficient customer base.

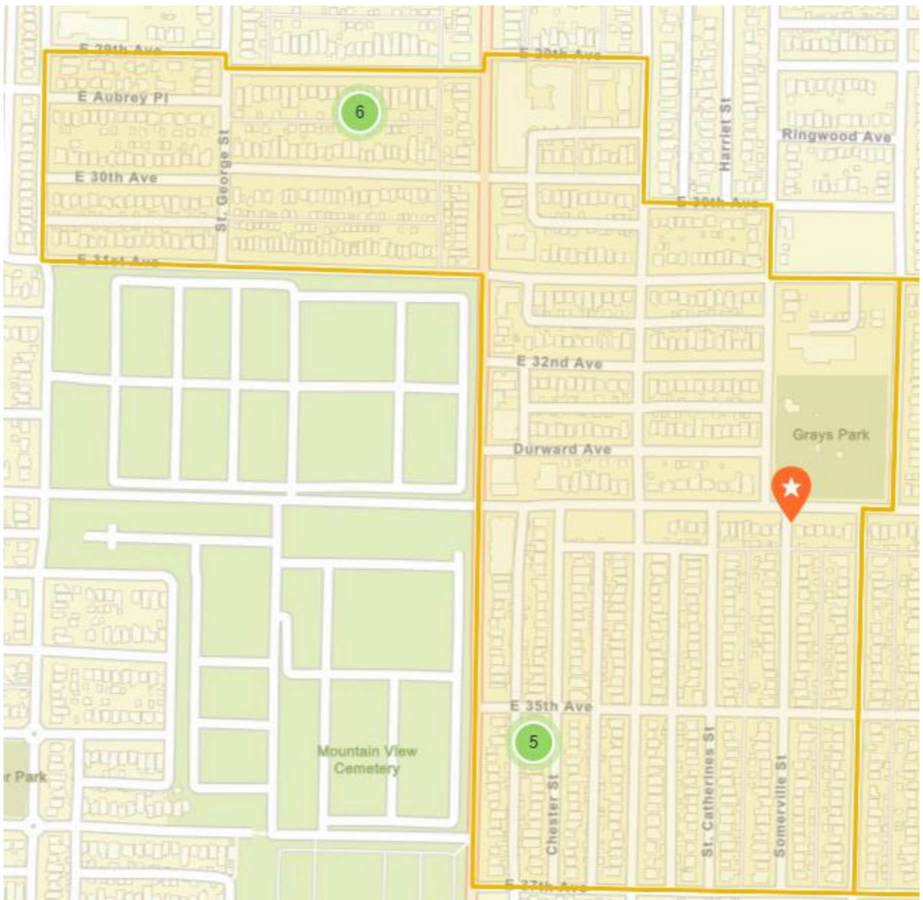
4.3 EAST SIDE VILLAGES

4.3.1 FRASER STREET & EAST 33RD AVENUE

Village Boundaries

The Fraser Street and East 33rd venue Village is centred on Fraser Street and East 33rd Avenue. It is bounded by East 29th Avenue to the north, Windsor Street to the east, East 37th Avenue to the south, and Prince Edward Street to the west.

Figure 12 Boundaries of Fraser Street and East 33rd Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The current retail mix in the Fraser Street and East 33rd Avenue Village is centred around a mixed-use building that occupies one block of Fraser Street, between 29th and 30th Avenue, on the east side. This building includes both retail and apartment spaces. Key retail tenants include a No Frills grocery store and a Shoppers Drug Mart, making the village primarily focused on grocery retail. Additionally, there is a dentist's office.

Table 23 Retail Floor Area Statistics by Retail Categories Within Village Node, Fraser Street & East 33rd Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**26,692**	**85.5%**
Supermarket	10,000	32.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	16,692	53.5%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**0**	**0.0%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**0**	**0.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	0	0.0%
Service Commercial	**4,521**	**14.5%**
Personal Services	0	0.0%
Professional Services	4,521	14.5%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**31,213**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**31,213**	**100.0%**
Total – Occupied Retail and Service Commercial	**31,213**	**100.0%**

Retail Proximity

Within 800 metres of the Fraser Street and East 33rd Avenue Village, retail offerings are limited. However, within a 1,200-metre radius, there is a wider range of significant retail options, including additional grocery stores, service-commercial businesses, and food and beverage establishments. Further down Fraser Street, between 29th and 22nd Avenue, the area offers a variety of restaurants, coffee shops, retail stores, and service commercial businesses, providing a more diverse tenant mix for local residents.

Table 24 Retail Floor Area Statistics by Retail Categories Outside Village Node, Fraser Street & East 33rd Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**3,100**	**39,082**
Supermarket	0	0
Grocer & Produce	0	6,540
Specialty Grocery	0	4,400
Convenience Store	3,100	6,636
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	5,800
Alcohol + Cannabis	0	2,272
Personal Goods	0	3,404
Other Convenience Retail	0	10,029
Comparison Goods	**0**	**15,399**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	1,292
General Merchandise	0	5,828
Home Goods	0	7,479
Sporting Goods	0	800
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**35,723**
Fast Food	0	6,234
Restaurant	0	22,519
Café & Specialty	0	6,970
Service Commercial	**3,450**	**73,927**
Personal Services	0	18,700
Professional Services	1,507	26,350
Automotive Services	0	6,000
Community Services	0	2,673
Office Services	0	9,166
Fitness / Recreation Services	1,943	11,038
Vacant	**3,793**	**27,274**

Vacant	3,793	19,700
Vacant Under Construction	0	7,574
Institutional (Non-retail)	**3,000**	**11,916**
Total – All Categories	**13,343**	**203,321**
Total – All Categories Excluding Non-Retail Institutional	**13,343**	**203,321**
Total – Occupied Retail and Service Commercial	**6,550**	**164,131**

Area Characteristics

The Fraser Street and East 33rd Avenue Village is a highly visible retail area, benefiting from both on-street parking and a parkade, offering convenient access for shoppers. The area experiences significant vehicle traffic along Fraser Street, making it an easily accessible location. However, there are concerns about pedestrian and cyclist safety and work could be done to enhance the pedestrian experience and public realm within the Village. The village's location remains prominent, contributing to its visibility and potential for retail activity.

Socio-Demographic Profile

The socio-demographic profile of the Fraser Street and East 33rd Avenue Village is characterised by a larger percentage of 3- and 4-person households, reflecting a family-oriented community. The village also has a higher proportion of owner-occupied households, with 65% of homes owned compared to the city-wide average of 46%. Additionally, the median household income in the village is 14% higher than the city-wide average, indicating a more affluent population.

	Village	City-Wide
Population (2021)	4,221	662,263
Total Households	1,590	305.026
1-person household	390 (25%)	119,510 (39%)
2-person household	495 (31%)	100,690 (33%)
3-person household	280 (18%)	38,685 (13%)
4-person household	280 (18%)	29,125 (10%)
5+ person household	145 (9%)	17,100 (6%)
Average Household Size	2.7	2.3
Median Household Income	$102,286	$89,8762
Owner Households	65%	46%
Renter Households	35%	54%

Latent Incremental Opportunity

Modelling suggests that this node is relatively well supplied today, with perhaps 5,000 square feet of latent opportunity across a range of categories. The area will, in general, require additional population growth before further retail demand emerges. Some specialty grocers interviewed for this project expressed interest in this node, suggesting that they would be complementary to the current general grocery offerings provided by No Frills.

Retail Expansion Opportunities

Multiple retail grocery interviewees were bullish on the opportunity for expansion and new locations along the Fraser corridor in general, with commentary about opportunity focusing on points outside of the Village boundaries: Fraser and 26th, Fraser and 41st, and Fraser between 18th and 20.th We understand through interviews that there are grocery and specialty grocery businesses about to open in some of these areas, including at 24th and Fraser and 18th and Fraser.

Within the Village as currently defined, there is opportunity to fill out a 2-block node on the west side of Fraser between 29th and 31st, leveraging presence of the No Frills (29th and Fraser) on the east side of the street. Beyond this block, opportunity is relatively limited for further expansion, noting the presence of the cemetery along Fraser street from 31st to 41st.

Fraser & East 33rd Avenue SWOC Analysis

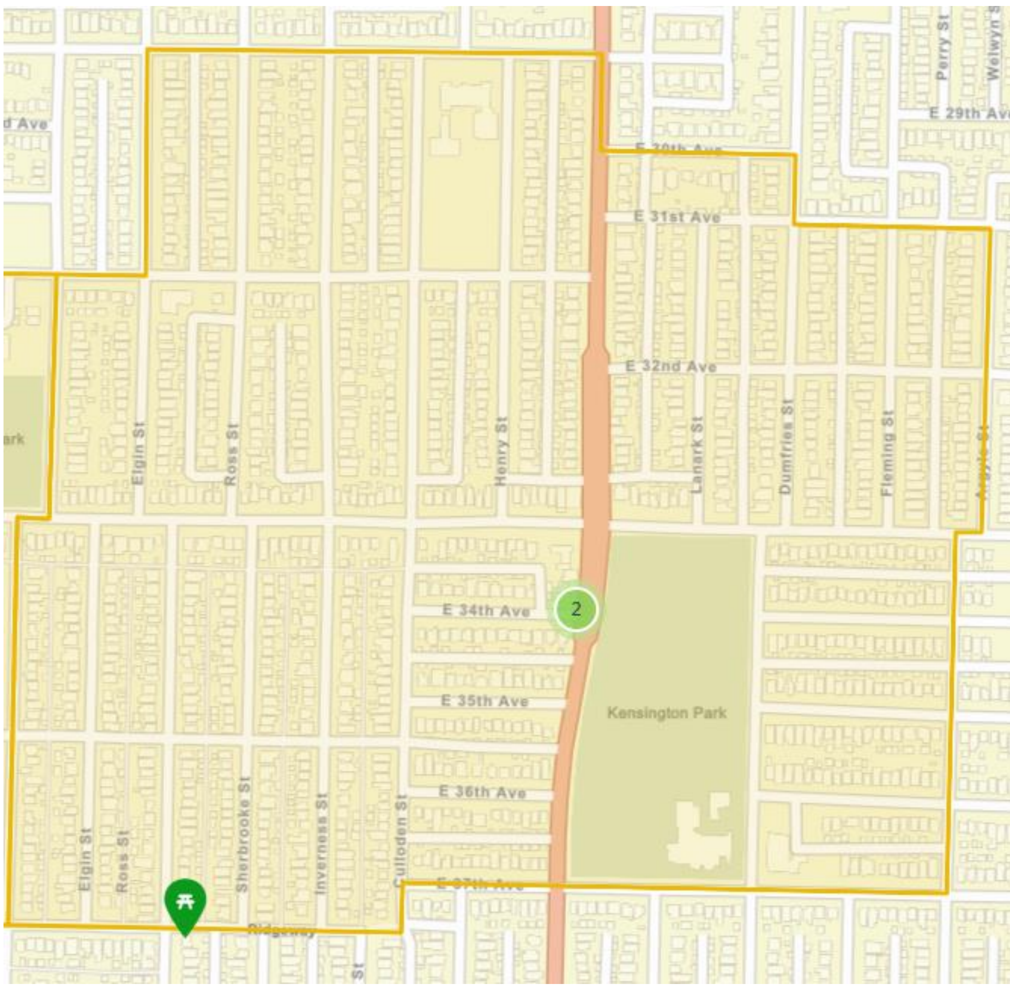
Strengths	**Weaknesses**
• Existing retail grocery anchor (No Frills - 4508 Fraser Street) at 29th and Fraser with Shoppers Drug Mart at 4590 Fraser Street anchoring this precinct. • Emerging new redevelopment south of 30th, filling out a 2-block retail node on the east side of the street. • Small Buy Low Foods (6095 Fraser Street) at 45th and Fraser serves the area well (and is likely undersized) as well as Fruiticana (6,140 square feet) at 6257 Fraser Street) • Strong cluster of specialty food retailers on Fraser south of 41st. • Future location of Omnitsky's deli around 18th and Fraser	• Cemetery limits opportunity for population growth and for double-loaded retail presence in that portion of the Village.
Opportunities	**Challenges**
• Opportunity to fill out 2-block node on west side of Fraser between 29th and 31st.	• Infill retail south of 29th will likely command high asking rents, which will limit potential tenant types. • No opportunity to expand on west side of street between 31st and 33rd

4.3.2 KNIGHT STREET & EAST 33RD AVENUE

Village Boundaries

The Knight Street and East 33rd Avenue Village is centred on Knight Street and East 33rd Avenue. It is bounded by East 29th Avenue to the north, Argyle Street to the east, East 37th Avenue to the south, and Windsor Street to the west.

Figure 13 Boundaries of Knight Street and East 33rd Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The current retail mix at Knight Street and East 33rd Avenue is limited, with a few key establishments serving the local community. Retail includes a gas station with a convenience store as well as a bakery. The area is anchored by the Kensington Community Centre, offering recreational and community services.

Table 25 Retail Floor Area Statistics by Retail Categories Within Village Node, Knight Street & East 33rd Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**6,750**	**100.0%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	2,000	29.6%
Convenience Store	3,400	50.4%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	1,350	20.0%
Comparison Goods	**0**	**0.0%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**0**	**0.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	0	0.0%
Service Commercial	**0**	**0.0%**
Personal Services	0	0.0%
Professional Services	0	0.0%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**6,750**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**6,750**	**100.0%**
Total – Occupied Retail and Service Commercial	**6,750**	**100.0%**

Retail Proximity

Notable grocery retail offerings within 1,200 metres of the Knight Street and East 33rd Avenue Village include T&T Supermarket and Famous Foods near Kingsway and Victoria Drive, as well as a Save-On-Foods at the intersection of King Edward and Knight Street. These grocery stores provide a wide variety of food options, serving the daily needs of the surrounding community and offering convenient access to residents in the area.

Table 26 Retail Floor Area Statistics by Retail Categories Outside Village Node, Knight Street & East 33rd Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**2,200**	**60,971**
Supermarket	0	14,000
Grocer & Produce	0	5,368
Specialty Grocery	0	4,932
Convenience Store	2,200	2,200
Other Food Retail	0	1,644
Pharmacy – Full Retail Mix	0	9,885
Pharmacy Plus	0	6,453
Pharmacy Only	0	0
Alcohol + Cannabis	0	10,665
Personal Goods	0	1,232
Other Convenience Retail	0	4,592
Comparison Goods	**0**	**8,822**
Accessories	0	0
Clothing	0	1,540
Hardware / Garden Store	0	2,000
General Merchandise	0	3,432
Home Goods	0	1,126
Sporting Goods	0	0
Art Goods	0	724
Automotive Goods	0	0
Food & Beverage	**0**	**39,908**
Fast Food	0	7,008
Restaurant	0	28,240
Café & Specialty	0	4,660
Service Commercial	**0**	**65,430**
Personal Services	0	17,914
Professional Services	0	30,192
Automotive Services	0	10,500
Community Services	0	2,612
Office Services	0	2,269
Fitness / Recreation Services	0	1,943
Vacant	**0**	**26,056**
Vacant	0	26,056

Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**14,711**
Total – All Categories	**2,200**	**215,898**
Total – All Categories Excluding Non-Retail Institutional	**2,200**	**215,898**
Total – Occupied Retail and Service Commercial	**2,200**	**175,131**

Area Characteristics

The area is characterized by a limited retail mix. The current retail space is primarily made up of smaller, single-story buildings, contributing to a more traditional, low-rise retail environment. The area has significant park space and community amenities for residents. Also, it is in close proximity to major arterial roads with a diverse tenant mix and grocery retail.

Socio-Demographic Profile

The socio-demographic profile of the area shows a higher median income compared to the city-wide average, indicating a more affluent population. The area also has a greater proportion of owner-occupied households, with 57% of homes owned compared to the city-wide average of 46%. Additionally, there are more 3, 4, and 5-person households than the city-wide average, suggesting a community with larger family households. This profile points to a neighbourhood with higher income levels, a greater rate of homeownership, and a family-oriented population.

	Village	City-Wide
Population (2021)	5,439	662,263
Total Households	1,935	305.026
1-person household	390 (20%)	119,510 (39%)
2-person household	585 (30%)	100,690 (33%)
3-person household	395 (20%)	38,685 (13%)
4-person household	345 (18%)	29,125 (10%)
5+ person household	250 (13%)	17,100 (6%)
Average Household Size	2.8	2.3
Median Household Income	$95,111	$89,8762
Owner Households	57%	46%
Renter Households	43%	54%

Latent Incremental Opportunity

Initial modelling suggests that this node has substantial latent demand, up to 50,000 square feet across categories. This includes retail grocery and convenience demand of at 10,000-18,000 square feet.

Retail Expansion Opportunities

Focus future development first on the 1300 block of East 33rd Avenue north and south sides of the street west of Knight. Further expansion may be warranted with Knight Street frontage, depending on the extent of retail opportunity identified in future projections,

Knight & East 33rd Avenue SWOC Analysis

Strengths	Weaknesses

• The corner of East 33rd & Knight is a high-profile location with busy vehicular traffic
• Currently has retail uses on 3 corners with food and convenience products including:
  ○ 7-Eleven (2,500 square feet) at 4894 Knight
  ○ Petro Canada Convenience Store at 1390 East 33rd
  ○ Tastory Halal Store (1,800 square feet) at 1391 East 33rd
  ○ Saint Germain Bakery (2,500 square feet) at 1395 East 33rd
	• Close proximity to save On Foods at 1403 East King Edward (Knight & King Edward) and Famous Foods make it unlikely for a larger scale food store
	• Significant hill on Knight combined with traffic congestion

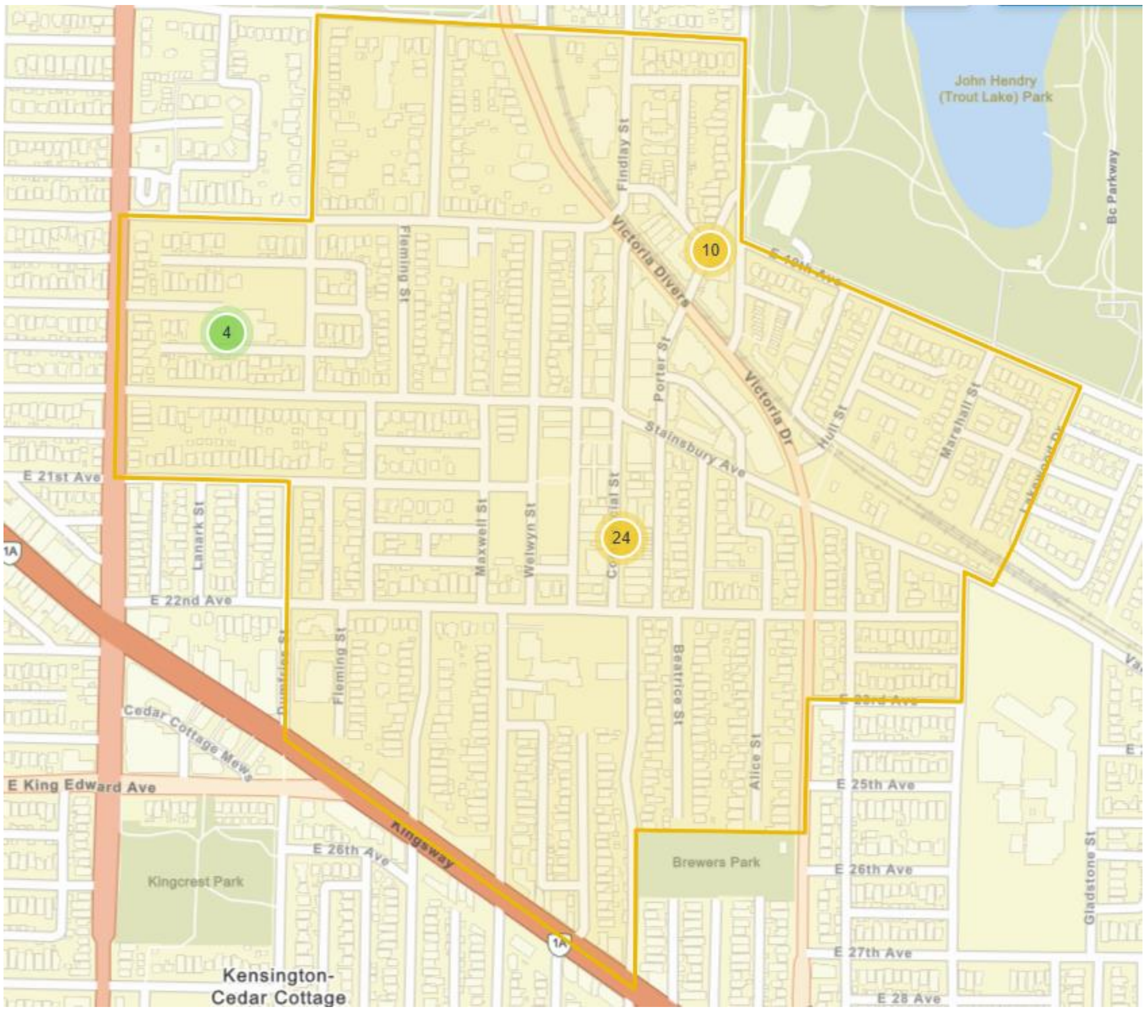
Opportunities	**Challenges**
• Focus future development on the 1300 blocks of East 33rd Avenue north and south sides of the street west of Knight. • Existing retail on NW corner of 33rd & Knight is an older building, which suggests future redevelopment opportunity.	• Knight street is a truck route and can be particularly loud at this location, with vehicles accelerating up the hill southbound.

4.3.3 COMMERCIAL STREET & EAST 20TH AVENUE

Village Boundaries

The Commercial Street and East 20th Avenue Village is centred on Commercial Street and East 20th Avenue. It is bounded by East 16th Avenue to the north, Lakewood Street to the east, Kingsway to the south, and Knight Street to the west.

Figure 14 Boundaries of Commercial Street and East 20th Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

Commercial Street and East 20th Avenue are one of three villages with over 50,000 square feet of existing retail floor space. Notable grocery offerings include the 11,000-square-foot Famous Foods on Kingsway and Perry Street. The area also features a diverse mix of service commercial businesses, comparison goods, and food and beverage establishments. These retail options are concentrated along Kingsway and within a 1,300-foot stretch extending from Commercial and 22nd Avenue to the Victoria Diversion, providing a vibrant and well-rounded retail hub for the local community.

Table 27 Retail Floor Area Statistics by Retail Categories Within Village Node, Commercial Street & East 20th Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**18,368**	**14.4%**
Supermarket	11,000	8.6%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	1,644	1.3%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	1,082	0.8%
Alcohol + Cannabis	0	0.0%
Personal Goods	1,562	1.2%
Other Convenience Retail	3,080	2.4%
Comparison Goods	**21,658**	**16.9%**
Accessories	1,232	1.0%
Clothing	0	0.0%
Hardware / Garden Store	5,744	4.5%
General Merchandise	0	0.0%
Home Goods	4,502	3.5%
Sporting Goods	5,008	3.9%
Art Goods	2,172	1.7%
Automotive Goods	3,000	2.3%
Food & Beverage	**15,652**	**12.2%**
Fast Food	5,931	4.6%
Restaurant	9,721	7.6%
Café & Specialty	0	0.0%
Service Commercial	**55,476**	**43.4%**
Personal Services	10,549	8.3%
Professional Services	18,084	14.1%
Automotive Services	9,000	7.0%
Community Services	2,612	2.0%
Office Services	11,345	8.9%
Fitness / Recreation Services	3,886	3.0%
Vacant	**16,683**	**13.1%**
Vacant	12,633	9.9%
Vacant Under Construction	4,050	3.2%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**127,835**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**127,835**	**100.0%**
Total – Occupied Retail and Service Commercial	**111,153**	**86.9%**

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Retail Proximity

In addition to being a thriving retail node, there are significant retail offerings both within 800 and 1,200 metres of the Village. This includes T&T Supermarket near Kingsway and Victoria Drive, as well as a Save-On-Foods at the intersection of King Edward and Knight Street. These grocery stores provide a wide variety of food options, serving the daily needs of residents.

Table 28 Retail Floor Area Statistics by Retail Categories Outside Village Node, Commercial Street & East 20th Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**35,710**	**84,689**
Supermarket	0	14,000
Grocer & Produce	1,342	3,912
Specialty Grocery	0	5,941
Convenience Store	0	14,300
Other Food Retail	1,644	1,644
Pharmacy – Full Retail Mix	16,692	0
Pharmacy Plus	0	0
Pharmacy Only	0	1,582
Alcohol + Cannabis	0	12,546
Personal Goods	9,062	4,678
Other Convenience Retail	6,969	26,086
Comparison Goods	**9,455**	**23,276**
Accessories	1,232	616
Clothing	1,540	1,540
Hardware / Garden Store	1,000	3,744
General Merchandise	3,432	8,749
Home Goods	2,251	5,628
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	3,000
Food & Beverage	**15,112**	**73,108**
Fast Food	0	7,908
Restaurant	11,665	61,594
Café & Specialty	3,447	3,607
Service Commercial	**55,906**	**156,431**
Personal Services	7,535	41,853
Professional Services	30,140	66,478
Automotive Services	3,000	12,000
Community Services	0	13,058
Office Services	11,345	17,214
Fitness / Recreation Services	3,886	5,830
Vacant	**18,219**	**92,358**
Vacant	18,219	70,158
Vacant Under Construction	0	22,200

Institutional (Non-retail)	**0**	**18,404**
Total – All Categories	**134,402**	**448,266**
Total – All Categories Excluding Non-Retail Institutional	**134,402**	**448,266**
Total – Occupied Retail and Service Commercial	**116,183**	**337,505**

Area Characteristics

The Commercial Street and East 20th Avenue Village features diverse retail offerings. The area offers a diverse tenant mix. The area also has two district retail areas. Along Commercial Street offers a community-focused, walkable environment with tree-lined streets and diverse storefronts, while areas near Kingsway provide a more high-traffic, vehicle-oriented retail experience. Together, these diverse retail areas contribute to a dynamic and varied shopping environment for the neighbourhood.

Socio-Demographic Profile

The socio-demographic profile of the Commercial Street and East 20th Avenue Village shows a higher number of 3, 4, and 5-person households, reflecting a community with larger family units. The median income in the village is 8% higher than the city-wide average, indicating a more affluent population. Additionally, the village has a similar balance of owner-occupied and renter households compared to the city-wide figures, suggesting a diverse housing mix.

	Village	City-Wide
Population (2021)	6,531	662,263
Total Households	2,600	305.026
1-person household	730 (28%)	119,510 (39%)
2-person household	845 (33%)	100,690 (33%)
3-person household	405 (16%)	38,685 (13%)
4-person household	395 (15%)	29,125 (10%)
5+ person household	230 (9%)	17,100 (6%)
Average Household Size	2.6	2.3
Median Household Income	$96,778	$89,8762
Owner Households	47%	46%
Renter Households	53%	54%

Latent Incremental Opportunity

Modelling suggests that the retail floor area of this node is currently well balanced with the local trade area demand. There will likely be future demand based on the area's growing population.

Retail Expansion Opportunities

This Village is fairly well served at its southern extent by Famous Foods, and Save-On Foods just outside the Village boundary at the southeast corner of Kingsway and Knight. There are likely opportunities to allow for expansion of offerings within the Commercial Street village area – focusing on Commercial Street between E. 22nd Avenue and Victoria Diversion – by ensuring that businesses which are operating as primarily cafes, artisanal food manufacturers, or caterers, have incentive to offer some other retail grocery items. The Flourist mill is already doing this to some degree, acting as manufacturer, café, and bakery, while also offering some limited produce, specialty grocery items, artisanal dairy, and local beer and wine and durable goods. This business offers a model that could be replicated elsewhere.

Given future growth potential in and around this Village, there will likely be opportunity in the future for another retail grocery store (to be confirmed with future modelling). Some interviewees have indicated interest in this precinct for <5,000 square foot offerings. There is also opportunity, as yet untapped, for retail to emerge in closer proximity to a major non-retail anchor: Selkirk Elementary School. The intersection of E. 22nd Avenue and Commercial Street has a notable vacant lot which would be ideal for one or more ground-level retail tenants fronting on to either Commercial Street or East 22nd (or both). Whether there is opportunity to expand beyond Commercial Street itself will be dependent on the extent of floor area demand identified in future forecasting work.

Commercial Street & East 20th Avenue SWOC Analysis

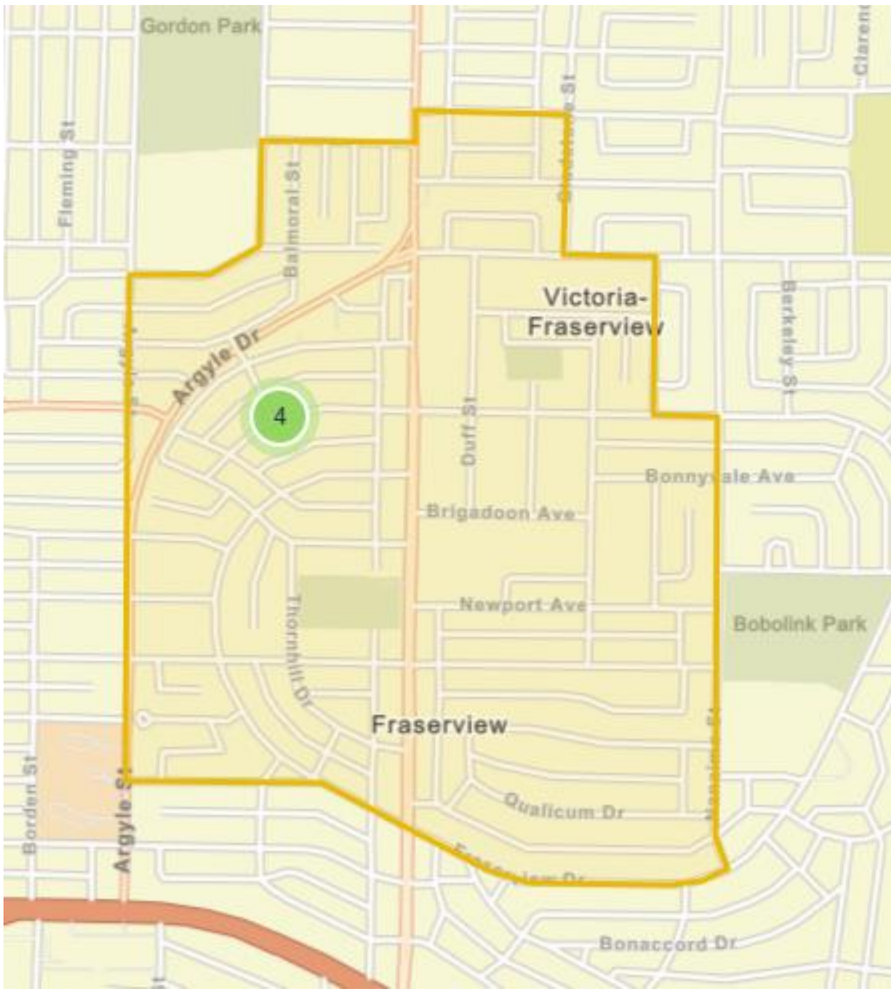
Strengths	Weaknesses
• Long history of 'combination businesses,' and recent infill in area has driven considerable new population and new businesses opening on the street. • Tenant mix has improved in recent years. • Village already has a grocery anchor at south end (Famous Foods) and large Save-On Foods nearby. • Area benefits from industrial zoning, allowing for interesting uses to emerge (e.g., Flourist Bakery / café)	• Street is wide and traffic moves fast. Sidewalks are too narrow. • Visibility limited from main arterials
Opportunities	**Challenges**
• Opportunity to better use Commercial Street right of way for non-vehicle use (e.g., sidewalk widening, patios) • Opportunity to encourage combination businesses (production, consumption, retail sales) • Opportunity towards south end of Commercial Street at E. 22nd Avenue.	• Depending on extent of projected growth opportunity, area may ultimately be challenged to find appropriate locations to house future retail uses.

4.3.4 VICTORIA DRIVE AND EAST 61ST AVENUE

Village Boundaries

The Victoria Drive and East 61st Avenue Village is centred on Victoria Drive and East 61st Avenue. It is bounded by East 52nd Avenue to the north, Nanaimo Street to the east, Fraserview Drive to the south, and Argyle Street to the west.

Figure 15 Boundaries of Victoria Drive and East 61st Avenue Village



Source: City of Vancouver “Shape Your City” Webmap

Current Retail Mix

Victoria Drive and East 61st Avenue Village is one of three Villages with more than **50,000 square feet of existing retail** floor space. There are two retail anchor tenants, Sunny Food Market and Murrick Insurance. In addition to retail floor space, there are also several non-retail anchor tenants, including Fraserview Boys & Girls Club with Fraserview Park on the west side of the Club and Fraserview Montessori Pre-school.

Table 29 Retail Floor Area Statistics by Retail Categories Within Village Node, Victoria Drive & East 61st Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**14,270**	**21.5%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	1,716	2.6%
Convenience Store	1,595	2.4%
Other Food Retail	3,431	5.2%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	1,419	2.1%
Personal Goods	2,513	3.8%
Other Convenience Retail	3,596	5.4%
Comparison Goods	**3,213**	**4.8%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	3,213	4.8%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**12,987**	**19.6%**
Fast Food	2,154	3.2%
Restaurant	10,833	16.3%
Café & Specialty	0	0.0%
Service Commercial	**24,412**	**36.8%**
Personal Services	8,022	12.1%
Professional Services	12,032	18.1%
Automotive Services	3,016	4.5%
Community Services	0	0.0%
Office Services	1,342	2.0%
Fitness / Recreation Services	0	0.0%
Vacant	**6,826**	**10.3%**
Vacant	6,826	10.3%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**4,642**	**7.0%**
Total – All Categories	**66,350**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**61,708**	**93.0%**
Total – Occupied Retail and Service Commercial	**54,882**	**82.7%**

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Retail Proximity

There are no additional retail offerings within 800 metres of the Village core. However, within 1,200 metres there are significant offerings.

Table 30 Retail Floor Area Statistics by Retail Categories Outside Village Node, Victoria Drive & East 61st Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**16,991**
Supermarket	0	0
Grocer & Produce	0	8,335
Specialty Grocery	0	3,166
Convenience Store	0	0
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	900
Pharmacy Only	0	0
Alcohol + Cannabis	0	2,497
Personal Goods	0	1,037
Other Convenience Retail	0	1,056
Comparison Goods	**0**	**20,325**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	2,300
General Merchandise	0	14,089
Home Goods	0	2,196
Sporting Goods	0	1,740
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**8,061**
Fast Food	0	3,062
Restaurant	0	4,999
Café & Specialty	0	0
Service Commercial	**0**	**38,907**
Personal Services	0	12,520
Professional Services	0	17,917
Automotive Services	0	3,016
Community Services	0	2,612
Office Services	0	1,342
Fitness / Recreation Services	0	1,500
Vacant	**0**	**12,514**
Vacant	0	12,514
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**0**

Total – All Categories	**0**	**96,797**
Total – All Categories Excluding Non-Retail Institutional	**0**	**96,797**
Total – Occupied Retail and Service Commercial	**0**	**84,283**

Area Characteristics

This is a very walkable, relatively transit friendly neighbourhood with excellent park access at Moberly Park, Ross Park and George Park. The area is served by a small existing retail node around 54th and Victoria. It also has a neighbourhood library south of 54.th

Socio-Demographic Profile

The socio-demographic profile of the Victoria Drive and East 61st Avenue Village is characterized by a higher percentage of larger households, with more 3, 4, and 5-person households. The average household size in the village is 2.9, compared to the city-wide average of 2.3. The village also has a higher percentage of owner-occupied households, with 60% of homes owned, compared to the city-wide average of 46%. The median income in the village is similar to the city-wide average, indicating a stable economic demographic. This profile reflects a family-oriented community with a strong rate of homeownership.

	Village	City-Wide
Population (2021)	5,008	662,263
Total Households	1,745	305.026
1-person household	355 (20%)	119,510 (39%)
2-person household	510 (29%)	100,690 (33%)
3-person household	340 (19%)	38,685 (13%)
4-person household	300 (17%)	29,125 (10%)
5+ person household	255 (15%)	17,100 (6%)
Average Household Size	2.9	2.3
Median Household Income	$90,556	$89,8762
Owner Households	60%	46%
Renter Households	40%	54%

Latent Incremental Opportunity

Modelling suggests a modest amount of latent opportunity for expansion of the retail footprint, up to 20,000 square feet. This includes 5,000 to 8,000 square feet of retail grocery and convenience.

Retail Expansion Opportunities

There is retail grocery expansion opportunity in this area, building upon the existing small grocery offerings, and given the significant distance to any larger grocery stores. There are numerous older buildings that are likely to be future redevelopment sites along Victoria Drive, north of 61st Avenue. This area has a non-retail anchor in the form of a Montessori school, along with the Fraserview Boys and Girls Club. Focus likely to be the 7400 and 7500 blocks of Victoria Drive, on the west side of the street.

Victoria Drive & East 61st Avenue SWOC Analysis

Strengths	Weaknesses

• Area is very walkable.
• Excellent transit
• Several **anchor** tenants:
  ○ 7595 Victoria Drive – Fraserview Boys & Girls Club with Fraserview Park on the west side of the Club
  ○ 1992 Prestwick Drive – Fraserview Montessori Pre-school
  ○ 7477 Victoria Drive - Sunny Food Market
  ○ 7523 Victoria Drive – Murrick Insurance
• Close to Sir James Douglas Elementary School
	• To preserve green space on east side of Victoria Drive, development opportunity will be limited to west side of Victoria Drive on the 7400 and 7500 blocks, so will not evolve into a double-sided precinct

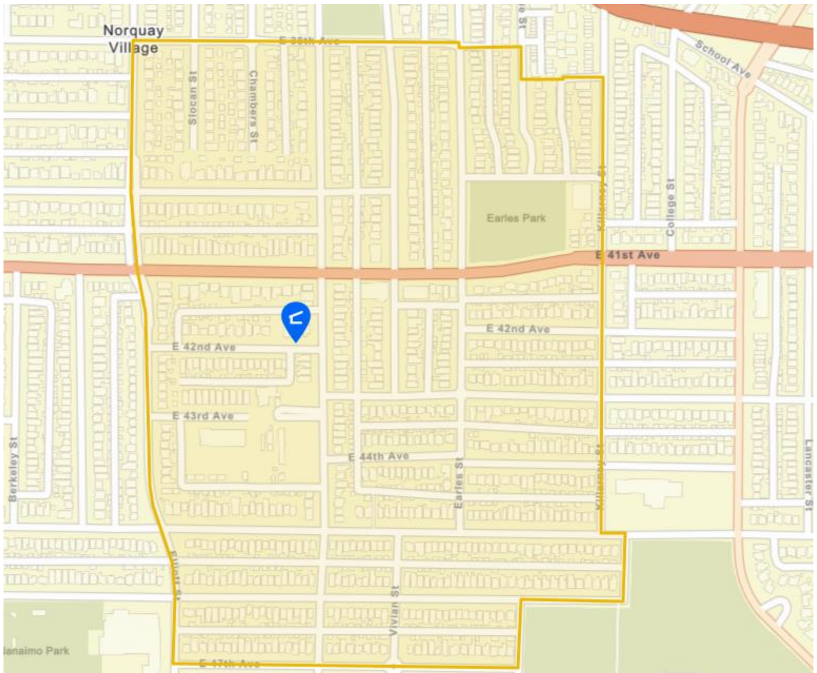
Opportunities	**Challenges**
• Future opportunity is limited to the west side of the street for the 7400 and 7500 blocks of Victoria Drive • DP Sign 2021-00597 for mixed use development with 2 retail units at grade	• Maintain the existing retail grocer through future development and potential increases in rent

4.3.5 WALES STREET & EAST 41ST AVENUE

Village Boundaries

The Wales Street and East 41st Avenue Village is centred on Wales Street and East 41st Avenue. It is bounded by East 38th Avenue to the north, Killarney Street to the east, East 47th Avenue to the south, and Clarendon Street to the west.

Figure 16 Boundaries of Wales Street and East 41st Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The current retail mix at Wales Street and East 41st Avenue is limited. There is an existing retail node that spans one block between Rhodes and East 41st and Wales and East 41st. On the south side of the street there is Medical Clinic, IDA Collingwood Pharmacy, and other service commercial establishments. On the north side of the street there is a credit union.

Table 31 Retail Floor Area Statistics by Retail Categories Within Village Node, Wales Street & East 41st Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**1,891**	**22.1%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	0	0.0%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	835	9.7%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	0	0.0%
Personal Goods	0	0.0%
Other Convenience Retail	1,056	12.3%
Comparison Goods	**1,861**	**21.7%**
Accessories	0	0.0%
Clothing	1,861	21.7%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**0**	**0.0%**
Fast Food	0	0.0%
Restaurant	0	0.0%
Café & Specialty	0	0.0%
Service Commercial	**4,821**	**56.2%**
Personal Services	0	0.0%
Professional Services	4,821	56.2%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**0**	**0.0%**
Vacant	0	0.0%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**8,573**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**8,573**	**100.0%**
Total – Occupied Retail and Service Commercial	**8,573**	**100.0%**

Retail Proximity

There are significant retail offerings within both 800 and 1,200 metres of the Wales Street and East 41st Avenue Village. The Village is within close proximity to Kingsway and the retail and grocery offerings, including T&T Supermarket and Safeway Collingwood.

Table 32 Retail Floor Area Statistics by Retail Categories Outside Village Node, Wales Street & East 41st Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**3,709**	**45,641**
Supermarket	0	0
Grocer & Produce	2,159	18,159
Specialty Grocery	0	5,753
Convenience Store	0	0
Other Food Retail	0	1,011
Pharmacy – Full Retail Mix	0	9,885
Pharmacy Plus	0	0
Pharmacy Only	0	1,633
Alcohol + Cannabis	0	2,400
Personal Goods	0	1,200
Other Convenience Retail	1,550	5,600
Comparison Goods	**0**	**15,601**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	1,500
General Merchandise	0	2,668
Home Goods	0	7,433
Sporting Goods	0	0
Art Goods	0	1,000
Automotive Goods	0	3,000
Food & Beverage	**4,001**	**46,773**
Fast Food	0	13,063
Restaurant	4,001	28,729
Café & Specialty	0	4,981
Service Commercial	**8,587**	**168,424**
Personal Services	0	34,778
Professional Services	8,587	89,884
Automotive Services	0	5,683
Community Services	0	7,772
Office Services	0	25,308
Fitness / Recreation Services	0	5,000
Vacant	**10,318**	**37,925**
Vacant	10,318	32,239
Vacant Under Construction	0	5,685
Institutional (Non-retail)	**3,000**	**5,108**

Total – All Categories	**29,615**	**319,472**
Total – All Categories Excluding Non-Retail Institutional	**29,615**	**319,472**
Total – Occupied Retail and Service Commercial	**16,297**	**276,439**

Area Characteristics

The Wales Street and East 41st Avenue Village is located on a busy arterial road, with excellent transit and bike access. Currently, parking on 41st Avenue limited, meaning residents must walk in or use residential side streets to park. As well, the Village is close to Dr. George Weir Elementary, a non-retail anchor.

Socio-Demographic Profile

The socio-demographic profile of the Wales Street and East 41st Avenue Village is characterised by a higher percentage of owner-occupied households, with 56% of homes owned compared to the city-wide average of 46%. The area also has a greater proportion of larger households, including 3, 4, and 5-person families. The average household size in the Village is 2.9, compared to the city-wide average of 2.3.

	Village	City-Wide
Population (2021)	4,252	662,263
Total Households	1,470	305.026
1-person household	265 (18%)	119,510 (39%)
2-person household	460 (31%)	100,690 (33%)
3-person household	290 (20%)	38,685 (13%)
4-person household	255 (17%)	29,125 (10%)
5+ person household	205 (14%)	17,100 (6%)
Average Household Size	2.9	2.3
Median Household Income	$93,333	$89,8762
Owner Households	56%	46%
Renter Households	44%	54%

Latent Incremental Opportunity

Modelling suggests there is latent opportunity to about double the floor area at this node. Including up to 8,000 square feet of retail grocery / convenience and 3,000 square feet for pharmacy.

Retail Expansion Opportunities

Retail expansion in this area would likely occur radiating east and west from the recent mixed-use development on the south side of E. 41st, at Rhodes Street. The most likely expansion direction is to the west. Areas for retail footprint expansion prioritization will need to be revisited following completion of demand forecasts.

Wales Street & East 41st Avenue SWOC Analysis

Strengths	Weaknesses

• Close to non-retail anchor (Dr. George Weir Elementary)
• 41st is a busy arteria.
• Excellent transit
• Very bikeable
• Existing retail node on the south side of the street including:
  o 2736 East 41st Avenue – Forward Care Medical Clinic (3,500 square feet)
  o 2732 East 41st Avenue - IDA Collingwood Pharmacy (1,500 square feet)
  o 2730 East 41st Avenue – Branded March (1,500 square feet)
  o 2728 East 41st Avenue – Vancouver Vaper Zone (1,500 square feet)
  o 2722 East 41st Avenue – Groom House (3,500 square feet)
• Existing retail node on the north side of the street:
  o Gulf & Fraser Credit Union with a DP sign 2023-00299 for mixed use with ground floor retail
	• Parking on 41st Avenue limited so walking in or park on residential side streets
	• Currently no retail grocer in tenant mix so must go to Joyce and Kingsway or 41st and Victoria

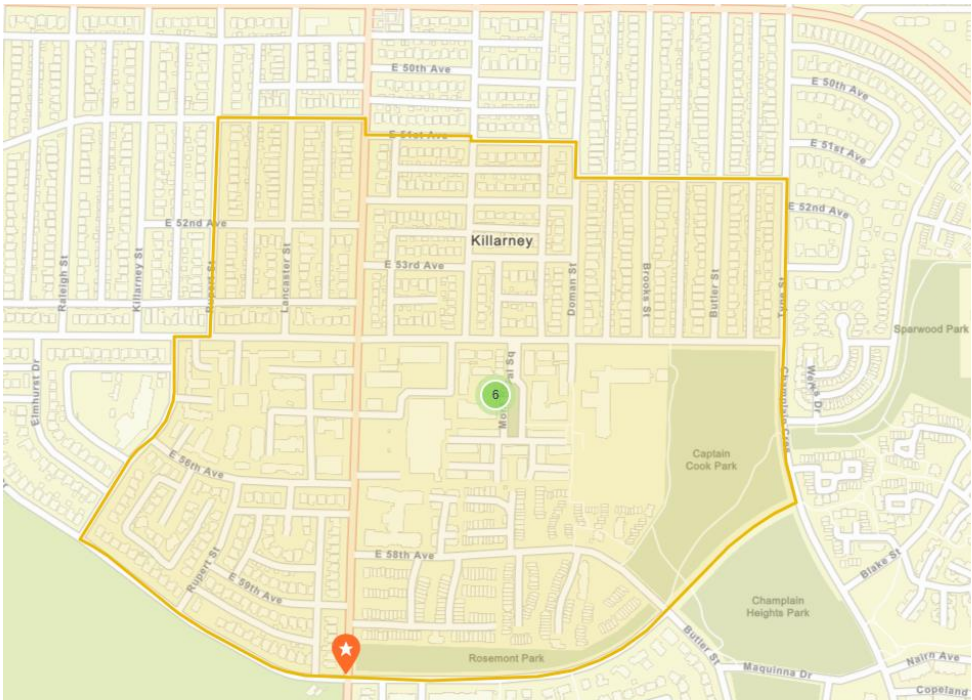
Opportunities	**Challenges**
• Opportunity for expansion out from newer mixed-use project on south side of E. 41st. Could expand west or east, depending on which areas provide the first opportunity for site assembly.	• Very busy street poses a challenge to create a village retail precinct vibe between the north and south sides of the street

4.3.6 KERR STREET & EAST 54TH AVENUE

Village Boundaries

The Kerr Street and East 54th Avenue Village is centred on Kerr Street and East 54th Avenue. It is bounded by East 51st Avenue to the north, Champlain Crescent to the east, Rosemont Drive to the south, and Killarney Street to the west.

Figure 17 Boundaries of Kerr Street and East 54th Avenue Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The Kerr Street & East 54th Avenue Village is unique amongst the Villages in that it is centred around a community-serving unenclosed shopping Centre at Champlain Square (81,061 square feet of ground-floor retail and 103,969 square feet total space) anchored by Your Independent Grocer (26,791 sq.ft.), Vancouver Public Library, and BC Liquor Store. There is service commercial in the Champlain Square Professional Building.

Table 33 Retail Floor Area Statistics by Retail Categories Within Village Node, Kerr Street & East 54th Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**40,140**	**46.3%**
Supermarket	26,791	30.9%
Grocer & Produce	2,411	2.8%
Specialty Grocery	802	0.9%
Convenience Store	0	0.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	3,137	3.6%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	6,243	7.2%
Personal Goods	0	0.0%
Other Convenience Retail	756	0.9%
Comparison Goods	**1,972**	**2.3%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	1,972	2.3%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**12,047**	**13.9%**
Fast Food	4,206	4.9%
Restaurant	4,623	5.3%
Café & Specialty	3,218	3.7%
Service Commercial	**22,670**	**26.2%**
Personal Services	5,084	5.9%
Professional Services	13,763	15.9%
Automotive Services	3,016	3.5%
Community Services	0	0.0%
Office Services	807	0.9%
Fitness / Recreation Services	0	0.0%
Vacant	**1,517**	**1.8%**
Vacant	1,517	1.8%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**8,336**	**9.6%**
Total – All Categories	**86,682**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**78,346**	**90.4%**
Total – Occupied Retail and Service Commercial	**76,829**	**88.6%**

Retail Proximity

There is no additional retail within 800 or 1,200 metres of the Village core.

Table 34 Retail Floor Area Statistics by Retail Categories Outside Village Node, Kerr Street & East 54th Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**0**
Supermarket	0	0
Grocer & Produce	0	0
Specialty Grocery	0	0
Convenience Store	0	0
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	0
Pharmacy Plus	0	0
Pharmacy Only	0	0
Alcohol + Cannabis	0	0
Personal Goods	0	0
Other Convenience Retail	0	0
Comparison Goods	**0**	**0**
Accessories	0	0
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	0
Home Goods	0	0
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**0**
Fast Food	0	0
Restaurant	0	0
Café & Specialty	0	0
Service Commercial +	**0**	**0**
Personal Services	0	0
Professional Services	0	0
Automotive Services	0	0
Community Services	0	0
Office Services	0	0
Fitness / Recreation Services	0	0
Vacant	**0**	**0**
Vacant	0	0
Vacant Under Construction	0	0
Institutional (Non-retail)	**0**	**0**
Total – All Categories	**0**	**0**

Total – All Categories Excluding Non-Retail Institutional	**0**	**0**
Total – Occupied Retail and Service Commercial	**0**	**0**

Area Characteristics

The Village includes an established community shopping centre which has a characteristic built form for shopping centre developments from that period. There is currently higher density housing surrounding the shopping centre, but the Village is primarily characterised by single-detached residential.

Socio-Demographic Profile

The socio-demographic profile of the Kerr Street & East 54th Avenue Village is characterised by a lower median household income than the city-wide average ($86,300 vs $89,876). The area also has a greater proportion of larger households, including 3, 4, and 5-person families. The average household size in the Village is 2.8, compared to the city-wide average of 2.3.

	Village	City-Wide
Population (2021)	4,957	662,263
Total Households	1,815	305.026
1-person household	385 (21%)	119,510 (39%)
2-person household	550 (30%)	100,690 (33%)
3-person household	375 (21%)	38,685 (13%)
4-person household	315 (17%)	29,125 (10%)
5+ person household	175 (10%)	17,100 (6%)
Average Household Size	2.8	2.3
Median Household Income	$86,300	$89,8762
Owner Households	50%	46%
Renter Households	50%	54%

Latent Incremental Opportunity

Modelling suggests this node is well served across all major categories today.

Retail Expansion Opportunities

Future opportunity for retail expansion at this node should remain focused on Champlain Square, and future infill / re-configuration / re-merchandising. Unlike many other Villages, the extent and mix of retail at this Village has likely been optimized already. For future redevelopment / infill at this site, the City should ensure that this redevelopment does not reduce the overall retail component from what exists today, particularly in the retail grocery category.

Kerr & East 54th Avenue SWOC Analysis

Strengths	Weaknesses
• Located on the southeast corner of Kerr and 54th Avenue (3200 East 54th Avenue) Champlain Square is an existing 103,985 square foot community shopping centre originally built in 1973 and later redeveloped removing much of the original interior mall. It has a number of strong retail attractors: o Your Independent Grocer o Shoppers Drug Mart o Kin's Fram Market o Champlain Heights Library o Bank of Montreal o BC Liquor Store	• This village node includes an established community shopping centre which has a characteristic built form for shopping centre developments from that period.

Opportunities	Challenges
• Future opportunity focuses on re-merchandising the existing tenant mix in Champlain square	• Urban design challenge to establishing a relationship at grade with a traditional open community shopping centre to other ground floor uses off site

4.3.7 NANAIMO STREET & EAST 1ST AVENUE

Village Boundaries

The Nanaimo Street and East 1st Avenue Village is centred on Nanaimo Street and East 1st Avenue. It is bounded by Venables Street to the north, Kamloops Street to the east, East 4th Avenue to the south, and Lakewood Drive to the west.

Figure 18 Boundaries of Nanaimo Street and East 1st Avenue Village

Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The current retail mix at Nanaimo Street and East 1st Avenue Village includes a combination of older single-story retail spaces and newer developments. Notable businesses include Columbus Meat Market and Renzullo Food Market, offering specialty food options, as well as a bakery and gas stations providing convenience goods to the community. Retail is concentrated along a 1,500-foot stretch of Nanaimo Street between 1st Avenue and Charles Street, primarily on the east side of the street. The village is anchored by Lord Nelson Elementary School, contributing to the area's family-friendly and community-focused atmosphere.

Table 35 Retail Floor Area Statistics by Retail Categories Within Village Node, Nanaimo Street & East 1st Avenue

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**21,882**	**31.3%**
Supermarket	0	0.0%
Grocer & Produce	1,950	2.8%
Specialty Grocery	13,627	19.5%
Convenience Store	0	0.0%
Other Food Retail	3,540	5.1%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	765	1.1%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	2,000	2.9%
Personal Goods	0	0.0%
Other Convenience Retail	0	0.0%
Comparison Goods	**7,150**	**10.2%**
Accessories	3,700	5.3%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	1,500	2.1%
Sporting Goods	1,950	2.8%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**7,918**	**11.3%**
Fast Food	1,800	2.6%
Restaurant	6,118	8.8%
Café & Specialty	0	0.0%
Service Commercial	**26,212**	**37.5%**
Personal Services	7,923	11.3%
Professional Services	15,789	22.6%
Automotive Services	2,500	3.6%
Community Services	0	0.0%
Office Services	0	0.0%
Fitness / Recreation Services	0	0.0%
Vacant	**6,707**	**9.6%**
Vacant	6,707	9.6%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**0**	**0.0%**
Total – All Categories	**69,869**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**69,869**	**100.0%**
Total – Occupied Retail and Service Commercial	**63,162**	**90.4%**

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Retail Proximity

This Village has no additional retail offerings within 800 metres. However, within 1200 metres there is significant grocery retail offerings.

Table 36 Retail Floor Area Statistics by Retail Categories Outside Village Node, Nanaimo Street & East 1st Avenue

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**173,213**
Supermarket	0	57,826
Grocer & Produce	0	28,500
Specialty Grocery	0	31,500
Convenience Store	0	4,572
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	3,400
Pharmacy Plus	0	0
Pharmacy Only	0	3,000
Alcohol + Cannabis	0	21,050
Personal Goods	0	14,325
Other Convenience Retail	0	9,040
Comparison Goods	**0**	**57,555**
Accessories	0	11,000
Clothing	0	17,850
Hardware / Garden Store	0	6,000
General Merchandise	0	12,305
Home Goods	0	2,000
Sporting Goods	0	1,200
Art Goods	0	7,200
Automotive Goods	0	0
Food & Beverage	**0**	**167,791**
Fast Food	0	16,621
Restaurant	0	118,920
Café & Specialty	0	32,250
Service Commercial	**0**	**96,097**
Personal Services	0	27,597
Professional Services	0	61,650
Automotive Services	0	0
Community Services	0	3,000
Office Services	0	2,350
Fitness / Recreation Services	0	1,500
Vacant	**0**	**30,527**
Vacant	0	27,527
Vacant Under Construction	0	3,000

Institutional (Non-retail)	**0**	**6,000**
Total – All Categories	**0**	**531,184**
Total – All Categories Excluding Non-Retail Institutional	**0**	**531,184**
Total – Occupied Retail and Service Commercial	**0**	**494,657**

Area Characteristics

The retail within the Nanaimo Street and East 1st Avenue Village consists primarily of older, single-story retail spaces, with a few newer developments emerging as part of ongoing redevelopment in the area. Retail offerings include a mix of local businesses, such as specialty stores and service-oriented establishments. On-street parking is available, and the area benefits from bike lane and sidewalk access, enhancing pedestrian and cyclist connectivity. Retail is integrated within a community that features single-detached dwellings on the same block.

Socio-Demographic Profile

The socio-demographic profile of the Nanaimo Street and East 1st Avenue Village is characterized by a higher percentage of owner-occupied households, with 67% of homes owned compared to the city-wide average of 46%. The village also boasts a higher median household income, which is 11% greater than the city-wide average. These factors suggest a more affluent community with a stronger rate of homeownership.

	Village	City-Wide
Population (2021)	2,421	662,263
Total Households	940	305.026
1-person household	215 (23%)	119,510 (39%)
2-person household	335 (36%)	100,690 (33%)
3-person household	155 (16%)	38,685 (13%)
4-person household	155 (16%)	29,125 (10%)
5+ person household	80 (9%)	17,100 (6%)
Average Household Size	2.5	2.3
Median Household Income	$99,600	$89,876
Owner Households	67%	46%
Renter Households	33%	54%

Latent Incremental Opportunity

Modelling suggests that this node is relatively well balanced today, with very minor incremental opportunity for grocery and restaurant food and beverage.

Retail Expansion Opportunities

Historically, there was a retail grocery presence at Charles and Nanaimo. Currently there is strong potential and strong retailers in the area. However, the precinct needs to be delineated with clear edges, in order to solidify its character and avoid an overly long contiguous retail stretch that cannot sustain a strong tenant mix. The extent of retail frontage that is appropriate cannot yet be determined in the absence of forecasts. As it is, the retail expansion has been occurring in a non-contiguous manner, such as the block between Grant and Gravely on the east side. There is a great deal of interest in this area from interviewees. To maintain the area's unique character, future commercial should not be allowed to run continuously into what is occurring at Broadway. The precise extent is not yet clear, but a precinct with well defined edges is required in a way that aligns with future growth.

Nanaimo & East 1st Avenue SWOC Analysis

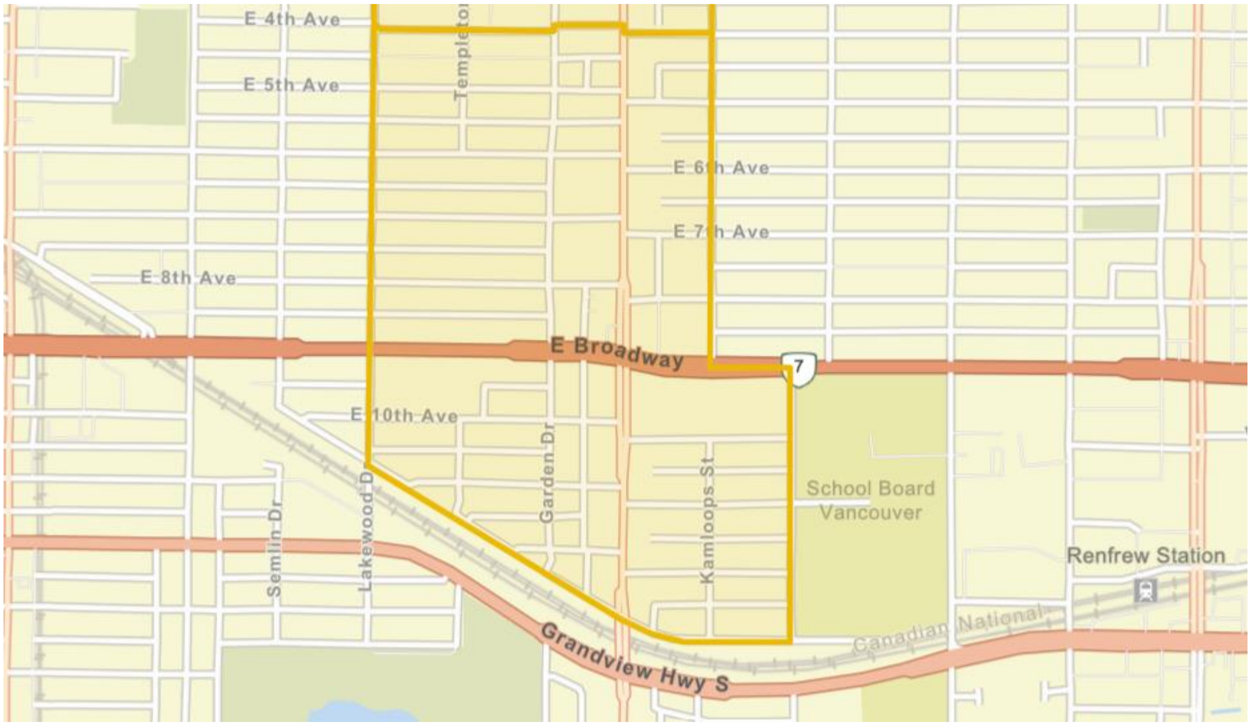
Strengths	**Weaknesses**
• Very good visibility and high profile • 4 corner typologies • 1st Avenue to Charles should be the focus for future development	• This node competes with retail on the east side of the street immediately to the north. • Further retail south of 1st Avenue should be avoided
Opportunities	**Challenges**
• 1st Avenue to Charles should be the focus for future development, however the extent of retail (i.e., the number of blocks that are supportable) will need to be re-visited following completion of retail demand forecasts.	• Retail loaded on opposite corners of a major street.

4.3.8 NANAIMO STREET & EAST BROADWAY

Village Boundaries

The Nanaimo Street and East Broadway Village is centred on Nanaimo Street and East Broadway. It is bounded by East 4th Avenue to the north, Penticton Street to the east, Grandview Highway North to the south, and Lakewood Drive to the west.

Figure 19 Boundaries of Nanaimo Street and East Broadway Village



Source: City of Vancouver "Shape Your City" Webmap

Current Retail Mix

The Nanaimo Street and East Broadway Village features significant retail offerings, although access to larger grocery stores and supermarkets is limited. Within the village, the retail mix includes a specialty grocer and a convenience store, catering to basic food and household needs. The village is anchored by Laura Secord Elementary School.

Retail is concentrated along a 700-foot stretch of Nanaimo Street, with businesses located on both the east and west sides of the street, particularly around the intersection of Broadway and Nanaimo.

Table 37 Retail Floor Area Statistics by Retail Categories Within Village Node, Nanaimo Street & East Broadway

	Floor Area (sq.ft.)	% of Total Floor Area
Convenience Goods	**5,511**	**11.2%**
Supermarket	0	0.0%
Grocer & Produce	0	0.0%
Specialty Grocery	1,500	3.1%
Convenience Store	1,000	2.0%
Other Food Retail	0	0.0%
Pharmacy – Full Retail Mix	0	0.0%
Pharmacy Plus	0	0.0%
Pharmacy Only	0	0.0%
Alcohol + Cannabis	2,000	4.1%
Personal Goods	0	0.0%
Other Convenience Retail	1,011	2.1%
Comparison Goods	**0**	**0.0%**
Accessories	0	0.0%
Clothing	0	0.0%
Hardware / Garden Store	0	0.0%
General Merchandise	0	0.0%
Home Goods	0	0.0%
Sporting Goods	0	0.0%
Art Goods	0	0.0%
Automotive Goods	0	0.0%
Food & Beverage	**24,649**	**50.1%**
Fast Food	4,000	8.1%
Restaurant	19,533	39.7%
Café & Specialty	1,116	2.3%
Service Commercial	**11,998**	**24.4%**
Personal Services	1,000	2.0%
Professional Services	10,341	21.0%
Automotive Services	0	0.0%
Community Services	0	0.0%
Office Services	657	1.3%
Fitness / Recreation Services	0	0.0%
Vacant	**3,000**	**6.1%**
Vacant	3,000	6.1%
Vacant Under Construction	0	0.0%
Institutional (Non-retail)	**4,000**	**8.1%**
Total – All Categories	**49,158**	**100.0%**
Total – All Categories Excluding Non-Retail Institutional	**45,158**	**91.9%**
Total – Occupied Retail and Service Commercial	**42,158**	**85.8%**

Retail Proximity

Within 800 metres of the Village Core there are no additional grocery retail operators. However, within 1,200 metres of the Village there are significant grocery retail offerings, including the 44,500 square foot Safeway on Broadway and Commercial.

Table 38 Retail Floor Area Statistics by Retail Categories Outside Village Node, Nanaimo Street & East Broadway

	Floor Area (sq.ft.), Within 800 Metres (m)	Floor Area (sq.ft.), 800 - 1,200 Metres (m)
Convenience Goods	**0**	**95,389**
Supermarket	0	45,500
Grocer & Produce	0	5,728
Specialty Grocery	0	7,500
Convenience Store	0	8,300
Other Food Retail	0	0
Pharmacy – Full Retail Mix	0	15,000
Pharmacy Plus	0	0
Pharmacy Only	0	2,000
Alcohol + Cannabis	0	4,000
Personal Goods	0	3,061
Other Convenience Retail	0	4,300
Comparison Goods	**0**	**10,700**
Accessories	0	2,500
Clothing	0	0
Hardware / Garden Store	0	0
General Merchandise	0	3,700
Home Goods	0	4,500
Sporting Goods	0	0
Art Goods	0	0
Automotive Goods	0	0
Food & Beverage	**0**	**55,717**
Fast Food	0	17,000
Restaurant	0	24,217
Café & Specialty	0	14,500
Service Commercial	**4,215**	**131,779**
Personal Services	0	12,996
Professional Services	2,715	74,883
Automotive Services	1,500	1,000
Community Services	0	9,300
Office Services	0	19,100
Fitness / Recreation Services	0	14,500
Vacant	**0**	**20,766**
Vacant	0	17,923
Vacant Under Construction	0	2,843
Institutional (Non-retail)	**0**	**7,500**

Total – All Categories	**4,215**	**321,851**
Total – All Categories Excluding Non-Retail Institutional	**4,215**	**321,851**
Total – Occupied Retail and Service Commercial	**4,215**	**293,585**

Area Characteristics

This is the convergence of two major arterial streets, and the tenant mix attracted to this location is going to be a hybrid between neighbourhood serving and commuter / pass-by traffic serving. Retail in the Nanaimo Street and East Broadway Village is mixed-use or low-rise older retail. The village is well-connected to surrounding areas, offering convenient access to a wide range of services and amenities on Broadway and Commercial and along Grandview Highway. The Village is also anchored by Laura Secord Elementary School. Additionally, the Village's proximity to the SkyTrain enhances multi-modal access and opportunities for transit-oriented development.

Socio-Demographic Profile

The socio-demographic profile of the Nanaimo Street and East Broadway Village is characterised by a higher percentage of owner-occupied households, with 67% of homes owned compared to the city-wide average of 46%. The area also has a greater proportion of larger households, including 3, 4, and 5-person families. Additionally, the median household income in the village is 9% higher than the city-wide average.

	Village	City-Wide
Population (2021)	3,489	662,263
Total Households	1,345	305.026
1-person household	325 (24%)	119,510 (39%)
2-person household	440 (33%)	100,690 (33%)
3-person household	275 (20%)	38,685 (13%)
4-person household	215 (16%)	29,125 (10%)
5+ person household	105 (8%)	17,100 (6%)
Average Household Size	2.6	2.3
Median Household Income	$98,000	$89,8762
Owner Households	67%	46%
Renter Households	33%	54%

Latent Incremental Opportunity

Modelling suggests that this node is relatively well balanced today, with no notable opportunity for immediate expansion.

Retail Expansion Opportunities

Future expansion at this node should ideally be oriented more towards Broadway than Nanaimo, with the focus being contiguous retail expansion from corner locations. There are at least three near-medium term redevelopment / expansion opportunities at this location – the TD location at the southwest corner, empty lot at the northeast corner, and older strip centre at the northwest corner. Opportunity for retail grocery expansion at this node will potentially be limited by the redevelopment / expansion of Safeway at Broadway and Commercial. Further, significant expansion at this node may unduly compete with the emergence of a more complete neighbourhood-oriented node between Charles and 1st Ave.

Nanaimo & East Broadway SWOC Analysis

Strengths	**Weaknesses**

• 2 very busy traffic corridor providing very good visibility.
• 2 different retail typologies – 4 corners and linear along Broadway and Nanaimo
• Examples of current businesses include:
  o A small convenience store at 2497 Nanaimo – 7 Heaven Mini Mart (1,000 square feet)
    ▪ A Bank at 2396 East Broadway-T.D. Canada Trust (3,398 square feet)
    ▪ Several restaurants including Trocadero (3,083 square feet) at 2411 Nanaimo.
	• Grade change along Nanaimo is not conducive to retail.
	• Need to differentiate between Nanaimo & 1st and Nanaimo & Broadway

Opportunities	**Challenges**
• The north-east corner of Nanaimo & Broadway has a vacant lot which is an opportunity to re-enforce establish double sided precinct on Nanaimo or re-enforce the Broadway node. • Grocer opportunities could be increased beyond the 1,000 square foot convenience store which is currently operating	• With commercial development on all 4 corners of Broadway and Nanaimo difficult to delineate a specific contiguous 2-3 block precinct • Decision required on whether the primary precinct is along Broadway with secondary commercial on Nanaimo (frontage facing Broadway and quality of tenant mix a consideration)

5.0 SYNOPSIS

This report provides the City of Vancouver Villages planning team with an overview of the current retail landscape within the City's Village planning areas. The intent of this document is to provide insights into the existing retail operations and potential opportunities for expansion, with particular focus on small-scale, anchored retail areas.

Amongst the 17 Villages that are subject to the City's initiative, over one-third already have retail grocery anchor tenants with most stores ranging from 3,000 to 10,000 square feet. Some Villages have opportunities for near-term expansion, based on the results of preliminary retail demand modelling. Many of the Villages that do not contain retail grocery stores often have specialty retail grocers or convenience stores. The provision of retail grocery in some Villages likely preclude such offerings from emerging in nearby Villages, in the absence of significant population expansion.

Successful small-scale retail grocery operations, such as Be Fresh and Organic Acres Market, suggest that a community hub focus is a viable business model, combining grocery offerings with coffee / prepared food areas, limited indoor seating, and abundant attractive outdoor patio space. Interviews with retail grocery operators indicated that store ranging from 3,000 to 10,000 square feet are likely appropriate for most Village areas, although some Villages may expand to a point where they can support larger grocery operators. In general, the focus for retail grocery at the Villages scale is likely to be local independents and smaller-scale local chains.

Commentary on extent and focus for retail expansion in each Village should be re-visited and updated following completion of comprehensive Village-scale retail floor area demand modelling. This will allow for a more nuanced discussion around areas for ground-level retail expansion.

APPENDIX A:
INTERVIEWEES

Over 20 grocery store owners / operators of all types and scales, were contacted by email or phone. The following list outlines all those who were approached for interviews, and the status of those interviews as of April 2025.

Retailer	**Status of Interviews** (April 2025)
Stong's Market	Preliminary conversation: full interview not completed; followed up multiple times via email.
Famous Foods	Interview completed
Vancouver Freshmart	Interview completed + follow up interview
Donald's Market	No response
City Avenue Market	No response
Be Fresh Local Market	Interview completed + follow up interview
Union Food Market	No response
Wilder Snail Grocery	No response
Stadium Market	Preliminary conversation; full interview not completed
The Local Farm Market	No response
Green's Market	Interview Complete
88 Supermarket	No response
Organic Acres Market	Interview completed + follow up interview
Sunrise Market	Interview complete
East West Market	Interview complete
Parthenon	Initial correspondence, but no response to follow-up for interview
Top Ten	Preliminary conversation, yielding some useful information, but did not proceed to a full interview.
Triple A Market	No response
Chong Lee Market	No response
Fruiticana	No response
Sunrise Market	Email exchange but no interview
Polo Market	No response

Interviews were also completed with:

- Andy Lowther, VP of retail leasing and real estate at Bentall GreenOak.
- Frank Ducote (Frank Ducote Urban Design)
- Don Mussenden, Investment and Commercial Sales & Leasing, Lee & Associates

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APPENDIX B:
FIGURES AND TABLES

TABLES

FIGURES