Corporation of the City of NEW WESTMINSTER

Attachment #2

Draft Full Retail Strategy Report

RETAIL STRATEGY NEW WESTMINSTER

PHASE 1 REPORT

FEBRUARY 2, 2022 | V.1 DRAFT FOR REVIEW

IN COLLABORATION WITH HAPPY CITY LAB INC.

URBAN SYSTEMS

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1.0 <u>INTRODUCTION</u>

With its compact form, central regional position, and excellent rapid transit accessibility, the City of New Westminster is positioned and poised for further growth and evolution as a desirable place to live and work for an increasingly diverse population and employment base. The City's economic development plan *Future Forward* noted that strong population growth (target of 104,000 by 2041) will continue to drive demand for additional neighbourhood-serving retail and service space across the City. As an increasingly diverse community (with 3,500 new Canadians settling in New Westminster between 2011 and 2016), with significant employment growth potential, the needs and wants of residents and workers will continue to drive shifts in shopping, dining, entertainment, and service demand. These shifts are accelerating as residents continue to adapt their spending habits and patterns throughout the COVID-19 pandemic, and possibly develop longer-term shifts in their shopping and recreating habits.

Now is an ideal time for New Westminster to position itself strategically to both take advantage of emerging trends and build upon the momentum that was already apparent in the period immediately pre-pandemic. This retail strategy is designed to do just that, setting the basis for informed decision making around long-range commercial land use planning, strategic commercial area interventions (e.g., programming, public realm, design guidelines), and proactive tenant retention and tenant attraction strategies.

This report is structured as follows:

1. **Section 2 - Trends Review:** an overview of notable current and emerging retail trends that may impact commercial planning-related decision making.

2. **Section 3 – Commercial Supply Review:** a comprehensive review of the New Westminster retail landscape today (i.e., a "taking stock" exercise), so that we can understand each commercial area's unique roles and characteristics, and to set the basis for demand and opportunity forecasts.

3. **Section 4 – Business Outreach and Surveys:** a synopsis of the engagement exercises undertaken with the businesses and residents of New Westminster, and key take-aways that inform the demand projection exercise.

4. **Section 5 – Mobility Data Backgrounder:** an overview of cellphone-derived human movement data, used in this analysis to guide the delineation of retail trade areas.

5. **Section 6 – Retail Trade Area Analysis** – delineation of New Westminster retail trade areas, and a socio-demographic review of each.

6. **Section 7 – Retail Commercial Demand Analysis** – City-wide and area-specific retail demand projections, and reconciliation of demand vs. supply.

7. **Section 8 – Action Plan [*note – this section is not included in this draft document]* –** a discussion of City-wide and area-specific actions that could be taken by the City, business owners, property owners and other organizations, as it relates to the retail commercial landscape.

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2.0 RETAIL TRENDS

2.1 PROVINCIAL AND METRO VANCOUVER RETAIL TRADE

2.1.1 RETAIL SALES GROWTH – BC AND METRO VANCOUVER

Retail sales in British Columbia grew at an average annual rate of 4.3% from 2008 to 2021, while sales in Metro Vancouver increased at an average annual rate of 4.5%. In 2021, retail sales in B.C. totalled just over $98.7 billion, of which approximately 46% ($45.7 billion) occurred in Metro Vancouver.

Retail sales growth slowed considerably in the period from 2017 to 2020; growth was just above 0% in Metro Vancouver between 2017 and 2018 and slipped into negative territory in the 2018-19 (-0.8%) and 2019-20 (-2.5%) periods. These 2-years of sales decline occurred while the region was still growing, at 1.8% and 1.1% year-over-year in each period respectively. The change from 2019-2020 included a significant overall decline in retail spending that occurred at the outset of the pandemic, which was followed later in the year by a fairly robust retail sales rebound. On a year-over-year basis, Metro Vancouver retail sales in March, April and May of 2020 were down -9%, -27%, and -18% respectively, before rebounding to between -1% and +1% year-over-year growth over the summer months.

Metro Vancouver and province-wide retail sales rebounded strongly into 2021, achieving growth rates of 17.1% and 12.8% respectively.

Figure 2-1: Retail Sales Annual Rate of Change, BC, and Metro Vancouver, 2008-2021

Source: Statistics Canada Retail Trade Sales by Province and Territory

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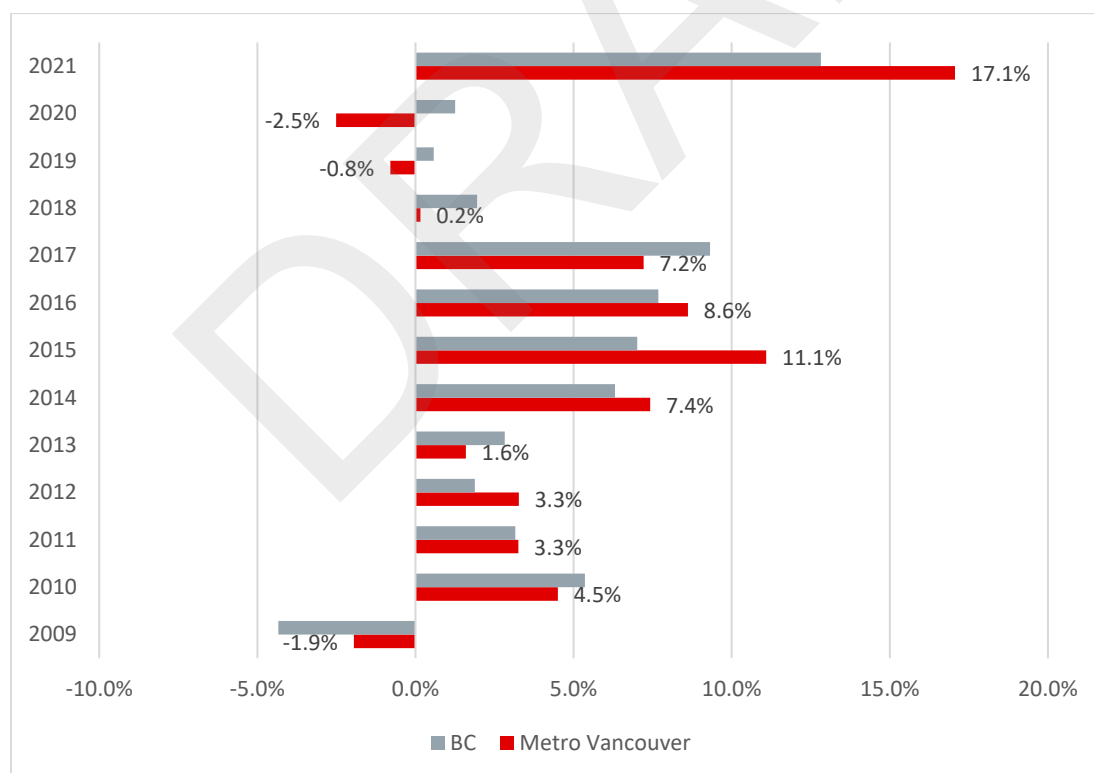
Looking at growth in absolute dollars for both the Province and Metro Vancouver, we find that:

- Sales across the province fell from 2008-2009 as the economy went into recession.

- There was a period of steady growth from 2009 to 2017, with average annual growth of 5.4% in the province and 5.9% in Metro Vancouver.

- From 2017 to 2020, Metro Vancouver accounted for a decreasing share of overall provincial retail sales

- The 2020-2021 period of sales rebound in Metro Vancouver and the province overall also saw a return to upward growth in Metro Vancouver's share of provincial sales.

Figure 2-2: British Columbia and Metro Vancouver Retail Sales, 2008 to 2021
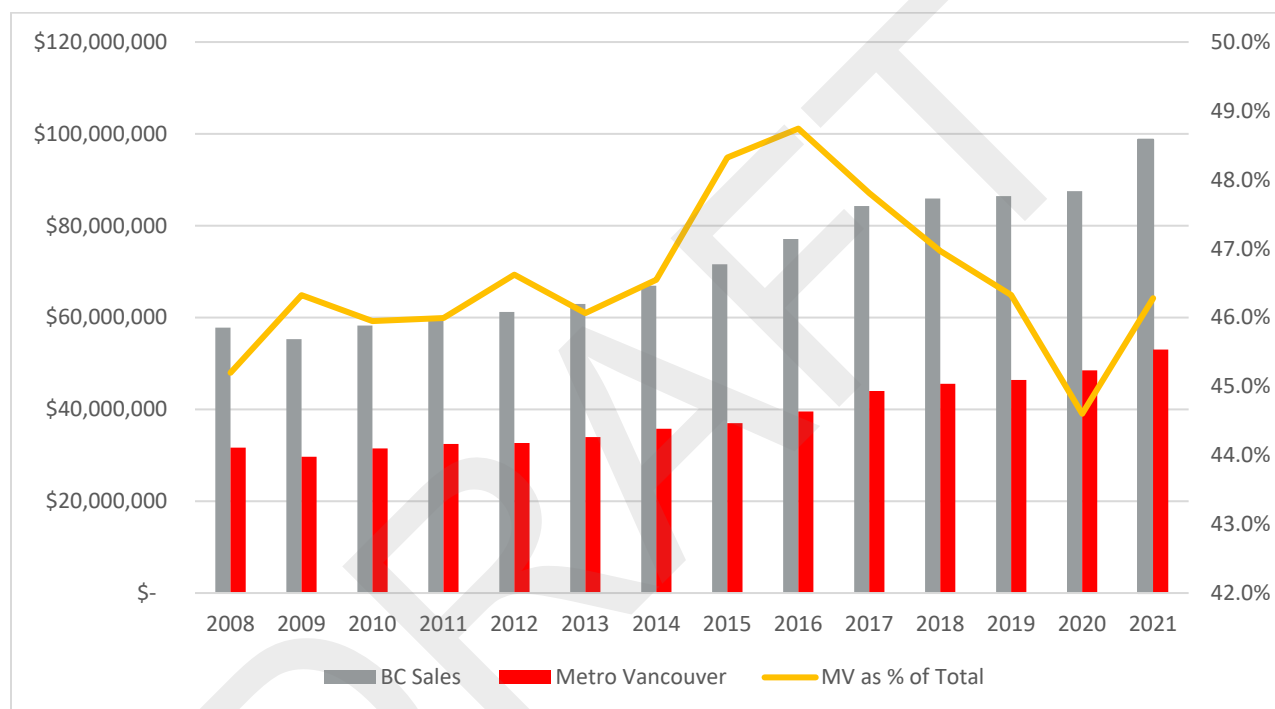
Source: Statistics Canada Retail Trade Sales by Province and Territory

2.1.2 RETAIL SALES GROWTH BY CATEGORY, METRO VANCOUVER

- The 2019-2020 period showed sizeable shifts in retail spending, largely brought on by the COVID-19 pandemic.

  o Retail sales in home-related goods such as building materials and garden equipment, and electronics and appliances, saw significant increases (+19% and +16% year over year, respectively)

  o Grocery retail sales also saw a sizeable increase, at +16% year over year.

  o The clothing / accessories sector saw a sizeable decrease in retail spending (-30% year over year), along with Miscellaneous store retailers (-15%), gasoline sales (-20%), furniture / home furnishings (-12%) and motor vehicle / parts dealers (-11.5%)

- The 2020-2021 period showed significant reversal of the 2019-2020 period, as many sectors opened back up, employment rates strengthened, and pandemic economic supports buoyed many household budgets.
    - The most dramatic year-over-year increases were seen in clothing and accessories, which saw a 36% increase from the previous year (during which sales had decreased substantially).
    - Gasoline sales and motor vehicle sales also saw sizeable increases (+52% and +33% respectively)
    - Another sector which saw a sizeable sales fortune reversal was furniture and home furnishings (+15.5%)
    - Building materials and garden supplies sales continued their upward growth from the previous year, with a further 13.5% increase.

Figure 2-3: Metro Vancouver Retail Sales Change by Category, 2018/19 to 2020/21
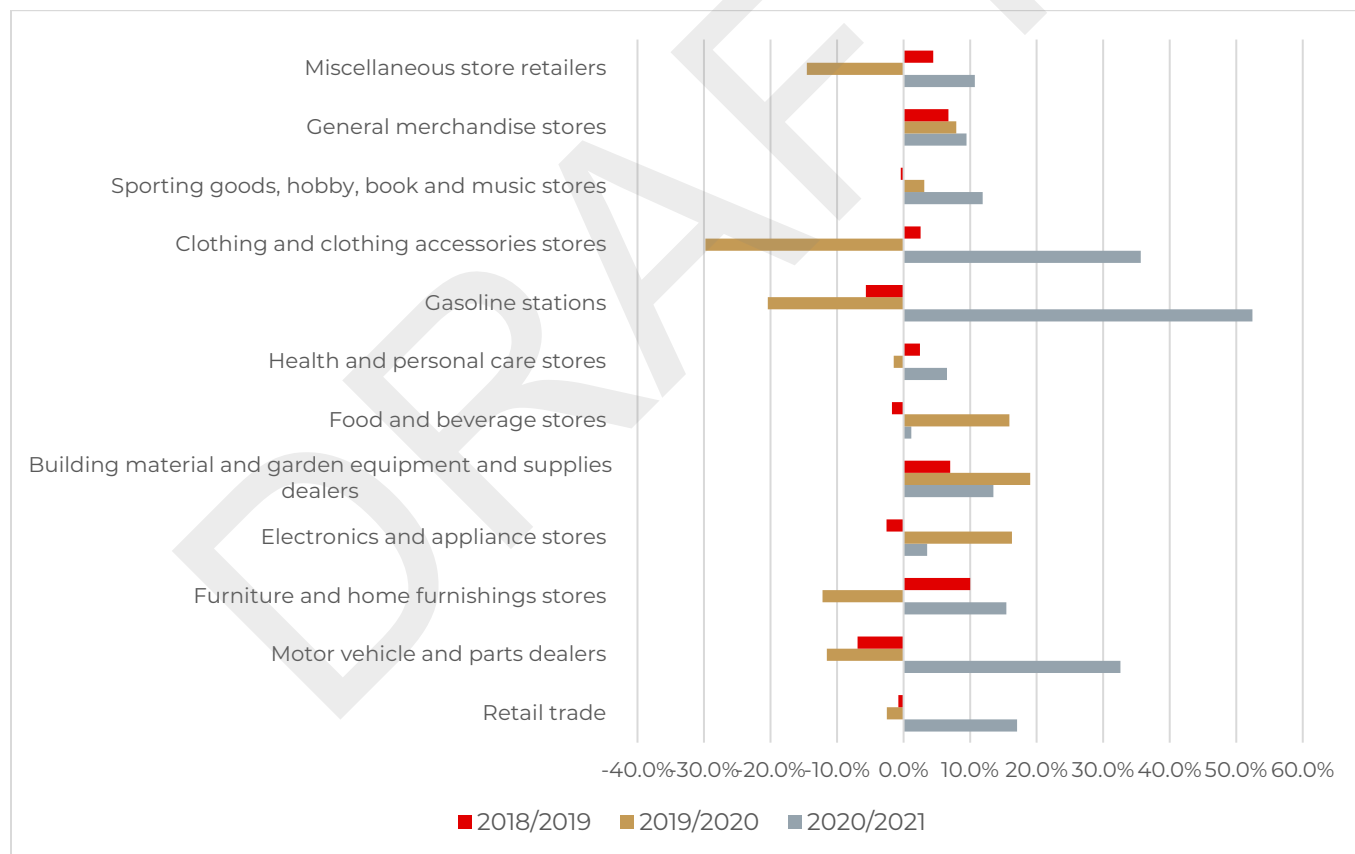
Source: Statistics Canada Retail Trade Sales by Industry

2.2   RETAIL CONCEPT TRENDS

2.2.1 E-COMMERCE EXPANSION AND RELATED TRENDS

Even before the onset of the COVID-19 pandemic in March 2020, e-commerce was quickly growing, as a proportion of total retail sales in Canada. According to Statistics Canada, e-commerce sales accounted for 1.6% of total sales in 2012, 2.4% in 2016, 2.0% in 2017, 3.3% in 2018, and 4.0% in 2019.

Growth in e-commerce in the 2016-2019 period was not evenly distributed across categories. Further, some categories began from a higher 2016 'base' than others. As of 2019, nearly 30% of Canadian electronics and appliance sales were occurring online, up from 17% in 2016. Categories that saw marked 'jump" in the 2016-2019 period were furniture/ home furnishings (up to 6.6%, from 2.2%) and Health/personal care (up to 5.5%, from 1.6%).

Table 2-1: Share of Annual Retail Sales by E-Commerce, Select Retail Categories, 2016 vs. 2019

	2016	**2019**
Furniture / Home Furnishings	2.2%	6.6%
Electronics / Appliances	17%	29%
Health / Personal Care	1.6%	5.5%
Clothing / Accessories	8.4%	10.6%
General Merchandise	2.5%	2.9%
Miscellaneous Retail	12.5%	14.6%

Source: Statistics Canada Retail Trade Survey

Following the onset of the COVID-19 pandemic in Canada in March 2020, consumer trends changed markedly. With businesses closing, reducing hours, and changing their in-store operations, and with consumers having to physically distance and having varying degrees of concern with frequenting indoor spaces with other members of the public, the option to purchase online became an important alternative. From February to May 2020, while total retail sales in Canada plummeted 17.9%, retail e-commerce sales more than *doubled* (+102%), with some retailers relying more on this method of sale. E-Commerce sales reached nearly $4.1 billion in May 2020, a 9.7% increase from April and a 102% increase from February. Year-over-year, e-commerce sales more than doubled, with a 125.7% increase from May 2019-2020.

While e-commerce sales have fallen off slightly from their April 2020 heights in terms of their *proportional share* of the total retail ecosystem (see Figure 2-4), this due to broadly rebounding and growing retail sales across the board, rather than any retrenchment in the popularity of e-commerce. In absolute terms, retail e-commerce sales strength and growth continue, as shown using the in-store vs. e-commerce indices presented in Figure 2-5. The relative position of e-commerce within the broader retail landscape remains far more prominent today than in the pre-pandemic period. Comparing the period from April to October 2021 vs. 2020, we see e-commerce sales of $24.5 billion vs. $23.6 billion.

Canadian e-commerce sales still lag those in the US. Whereas e-commerce sales as a proportion of total retail spending reached 6.4% in Canada for the 2020 calendar year (up from 3.7% in 2019), that figure was 21.3% for the United States (up from 15.8% in 2019). For comparison, the e-commerce share that was achieved in Canada in 2020 was equal to that observed in the United States in 2010.

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Figure 2-4: E-Commerce as % of Total Retail Sales (Orange) and Total Retail Sales (Red), Canada.
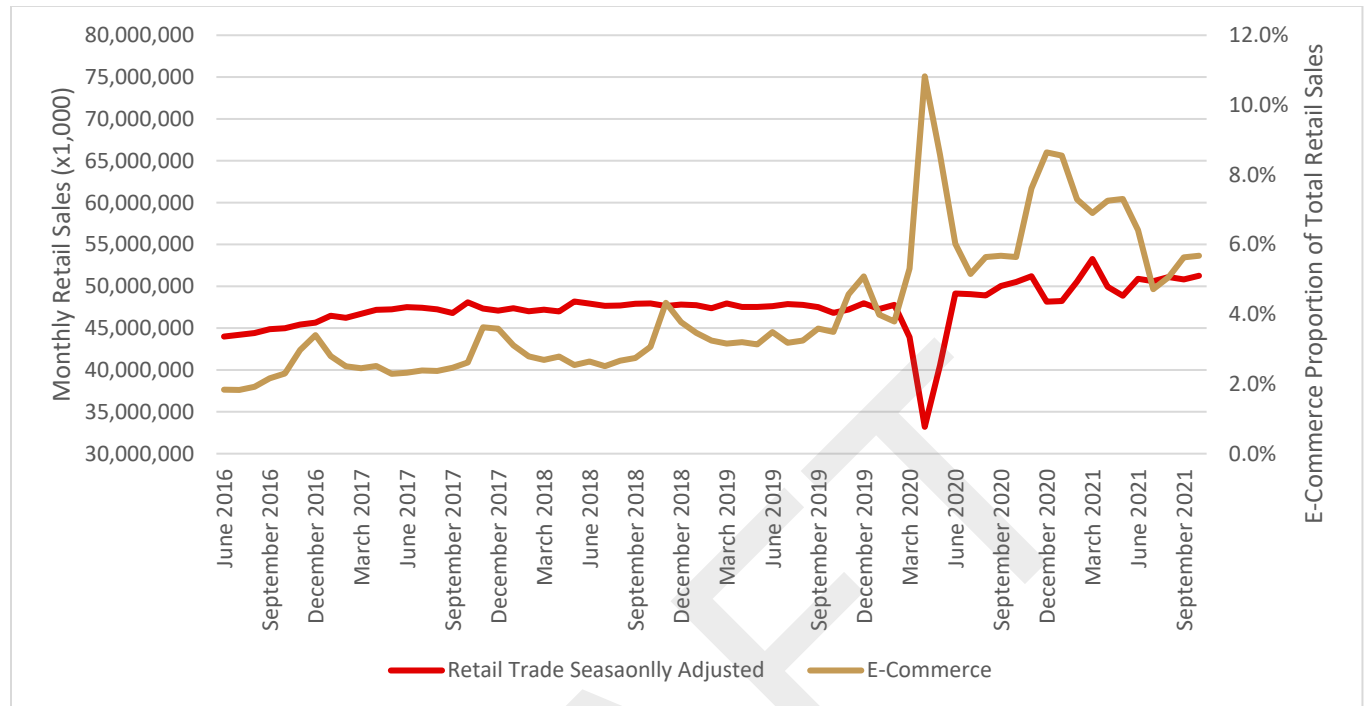
Source: USL analysis of Statistics Canada Retail Trade Survey

Figure 2-5: Indexed Monthly Retail E-Commerce Sales vs. In-Store Sales, June 2016-Sept. 2021
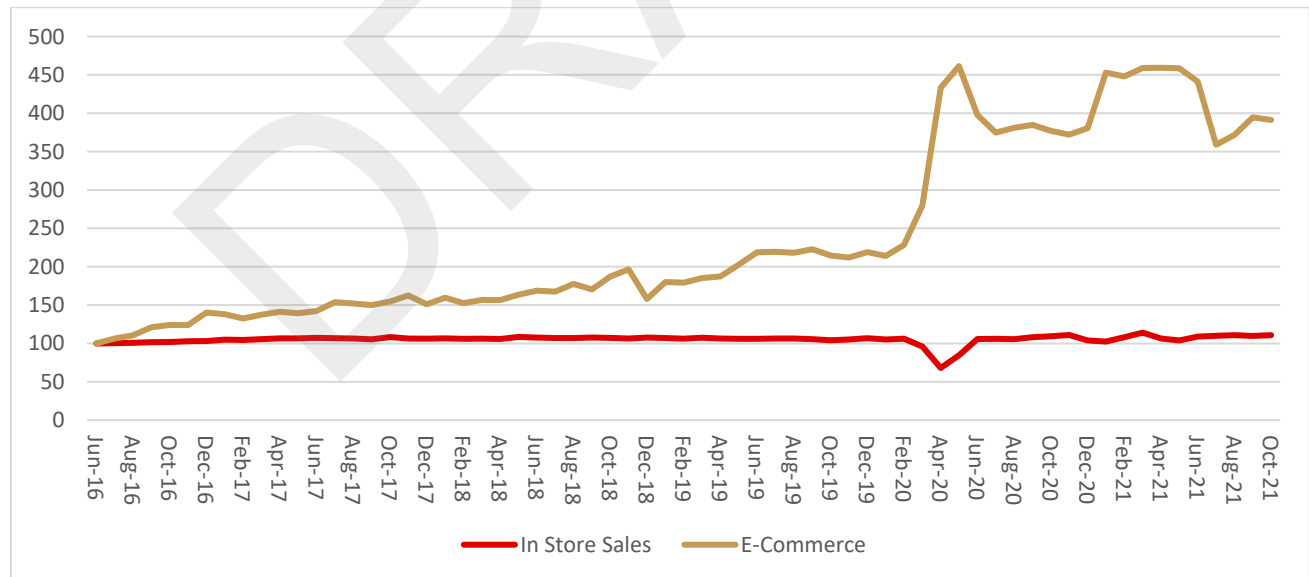
Index (June 2016 = 100)

Source: USL analysis of Statistics Canada, Monthly Retail Trade Survey

Table 2-2: **Online and In-Store Retail Sales as % of Total Retail Spend, Canada vs. USA, 2016-2020**

	2017	2018	2019	2020
Canada	2.7%	3.1%	3.7%	6.4%
USA	11.8%	14.4%	15.8%	21.3%

Sources: USL analysis of Statistics Canada Retail Trade Survey and U.S. Department of Commerce data.

The pace of growth in the Canadian e-commerce space has been more prominent amongst non-essential retailers.

- From February to April 2020, only the food and beverage sub-sector experience an increase in in-store sales (+3.3%) and a surge in e-commerce (+107%)

- In-store sales declined for general merchandisers (-15.1%), building materials and garden suppliers (-15.8%) and health and personal care stores (-16.1%).

- Other retail sub-sectors such as furniture, sporting goods, hobbies, book and music stores, and clothing / clothing accessory stores saw much sharper declines in in-store sales (-70%, -84% and -79%, respectively)

Will COVID-19 have a lasting impact on the retail sector? Recent data indicates that the retail sector overall rebounded fully and quickly from the period in early 2020, and that the e-commerce shift in many categories has persisted. It is expected that much of the jump in e-commerce sales will be a permanent change in shopping behaviour. A partial shift back to bricks-and-mortar shopping will continue (as has been seen in recent months) but will be less prominent than would have been the case in the absence of the pandemic 'shock'. The patterns we are observing now will also have a greater chance of persisting as the pandemic wears on, and long-term habits are developed.

There are numerous implications for the bricks-and-mortar retail landscape going forward as a result of persistent and growing e-commerce demand. Some of these implications are discussed below.

Business Adaptation to Omni-Channel

Omni-channel refers to the multi-channel approach to marketing, selling and serving customers in a way that creates an integrated, cohesive customer experience (and access to goods) regardless of how or where the customer reaches out. A customer may shop online or in a physical store (or some combination), and the experience should be relatively seamless.

Omni-channel is differentiated from 'multi-channel' by the depth of integration. Simply, omni-channel experiences use multiple channels (in-store, computer, mobile etc.), but not all multi-channel experiences are omni-channel. A business may have excellent mobile marketing, engaging social media and a compelling website. But if they do not all work together well, they have not achieved an omni-channel presence.

The pandemic has led to something of a paradigm shift in the need for most retail businesses to rapidly adopt and adapt their online presence. This does not mean, however, that omni-channel will inevitably replace the physical retail store. Bricks-and-mortar businesses will likely remain a critical element for those that are most successful at omnichannel. However it will be the retailers' online presence (website, apps, email, social media) that will be the single most important portal to start interacting with customers. In a world where, on average, 80% (and growing) of customers make their retail brand

or purchase decisions online, and omnichannel customers purchase up to 70% more often than those who are offline only, the impact of online channels on the offline businesses are, and will be, significant.[1]

Micro Warehousing / Distribution / Logistics

The rapid rise of e-commerce is driving the simultaneous need for micro-warehousing. This refers to the concept of running small-scale warehouse facilities (as small as 3,000 square feet in some instances) at accessible locations that are closer to end-consumers. Some of these may take the form of their own dedicated storage buildings. Others may be embedded within existing commercial spaces. The premise behind micro-warehousing is that, as the volume and importance of e-commerce increases, so to must the efficiency and speed of online order fulfillment, while also taking the load off retailers storing and managing their inventory.

The need for micro-warehousing is driven by a combination of factors:

- More e-commerce sales, across all retail categories

- Limited storage space for online operators, and need for in-store fulfilment strategies

- Rising delivery expectations (e.g., same-day or sooner delivery)

- Rising importance of e-commerce for grocery and other essentials

Ghost Kitchens and Dark Stores

Ghost kitchens are industrial kitchens designed to make food for pick-up or delivery. A number of restaurant concepts have opened using ghost kitchens in recent years, with the goal of capitalizing on the growth in food delivery platforms. This trend was already emerging pre-COVID, and has been rapidly accelerated since. One of the most prominent pre-COVID example of this phenomenon was seen in Toronto, where a local restaurateur opened 15 restaurants, almost none of which with a dining room or take-out counter. All were operated by way of delivery services exclusively. This phenomenon allows restaurateurs to save on staff costs and rent, allowing for experimentation with new concepts.

The pandemic-related boom in demand for takeout and delivery meals has boosted momentum of this phenomenon. There are instances now where multiple restaurants will share a common kitchen and common storage, as their primary (or only) business lines are delivery and pickup. There is also now an emerging trend of ghost kitchens appearing inside grocery stores.

Major grocers have recently announced forays into ghost kitchens via partnerships: Walmart Canada, for instance, has partnered with "Ghost Kitchen Brands", and is opening such locations across Ontario and Quebec. Customers can order from kiosk in store, or order online for pickup or delivery, from a wide variety of chain restaurants.

As restaurants and grocery stores pivot into partnerships with delivery operators, those delivery services themselves are expanding their purview through the operation of their own 'dark store' warehouses, from which they offer free delivery of 2,000+ items. Dark stores are a term for retail grocery stores whose sold purpose is the fulfillment of pickup and delivery orders. They are typically being located in urban areas relatively near customers, are smaller than grocery stores, and stock a lower variety of products. Their sizes range from <2,000 square feet to >40,000 square feet This concept is being

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[1] McKinsey Apparel Omnichannel Survey, 2019. Mckinsey.com.

deployed in North America by Amazon (via Whole Foods),[2] DoorDash ('DoorDashKitchens' / DoorDashEssentials), and other smaller, more localized operators.

Figure 2-6: DoorDash Essentials' "Dark Store", Dallas, Tx.

For traditional large-scale grocery store operators, ghost kitchens have been a large source of growth since the onset of the pandemic. Online grocery sales – for delivery or curbside pickup – have increased dramatically over the past 2 years. In 2019, an online panel survey indicated that 15% of Canadians bought groceries online and picked them up in store. The same survey conducted in Q1 2021 showed that this figure had increased to 31%.[3] This type of pattern is leading to changes in the Canadian grocery industry.

2.2.2 LARGE FORMAT AND POP-UP RETAIL

The combination of e-commerce, micro-warehousing, flexible delivery and pandemic-induced shifts to shopping patters are accelerating the demise of the large format retail stores in most categories. Many are pivoting their concepts, both 'right sizing' into smaller footprints, or using their space as part of an omni-channel strategy.

Pop-up retail is not in itself an emerging trend. Pop-ups have had regular presence in many settings for at least the last 20 years, including at festivals, sales events, and through creative work of business associations and neighbourhood groups temporarily activating vacant stores. The growing trend in pop-up retail is its use as a way for established (or growing) retailers to experiment with new products or approaches in a way that may not be feasible otherwise.

One example of this pop-up concept is the use of pop-ups by previously online-only retailers. Pop-ups are used by these brands to test new concepts and gauge levels of consumer interest in bricks-and-mortar presence. This can lead to some electing for permanent street locations, such as Indochino on Homer Street, or Clearly on Robson Street in Vancouver.

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[2] DoorDash Enters Grocery Retail With Dark Convenience Stores | by matt newberg | HNGRY | Medium
[3] Statista, July 2021 data release.

Pop-up retail is also being used by developers as part of the process of creating a compelling tenant mix in some of their new, mixed-use projects. One of the more notable examples in recent years is the *Atrium* project on Bay Street in Toronto. The developer's pop-up initiative made several spaces in the retail podium available for temporary activation, with the goal of attracting a more diverse clientele and providing a boost for adjacent retail tenants. For the pop-up brands that used the space, this helped to create publicity and test their concepts. Atrium partnered with a firm specializing in temporary retail activation, which works with landlords and brands across North America to bring pop-ups to new projects and established street districts.

2.2.3 COMBINATION STORES

Small-scale manufacturing, with ancillary retail and /or service space, is a phenomenon that is on the rise, particularly in denser, more expensive urban environments. Its success requires more flexible zoning regulations to accommodate it. In some cities, this has taken the form of 'craft districts' where products are made and exported, but also sold on site. This can include apparel, homewares, sporting goods, musical instruments, and food & beverage. This type of small-scale manufacturing / retail / service is growing in demand, building on changing consumer sentiment against homogenous production and products and a desire for locally, ethically and sustainably sourced products.

Zoning bylaws are under increasing pressure to ensure they can accommodate artisanal producers that blur the lines between light industry, retail and service commercial, Many artisanal businesses would benefit from 'performance-based' regulation that judges appropriateness based on local impact rather than use.

2.2.4 MICRO RETAIL

This concept may include multiple vendors 'co-locating' in a shared space, utilizing shared resources (e.g., one commissary kitchen, one seating area). A food hall is a good example of this concept. Or, it may encompass individual retail units that are much smaller than the average, likely under 500 square feet. The intent is to provide an entry-level 'gateway' for small businesses to establish a bricks-and-mortar location, without the financial requirements and risks typically expected in a standard retail lease. Micro units are typically set up for flexibility in lease term.

One of the newer examples of this concept is emerging in the *Mirvish Village* mixed-use development in Toronto. This micro-retail 'alleyway', which is to supplement a more traditional retail main street-type environment, will include over 25 "move-in ready micro retail units for retail entrepreneurs." Unit sizes range from 174 square feet to 438 square feet. (see floor plan at right).
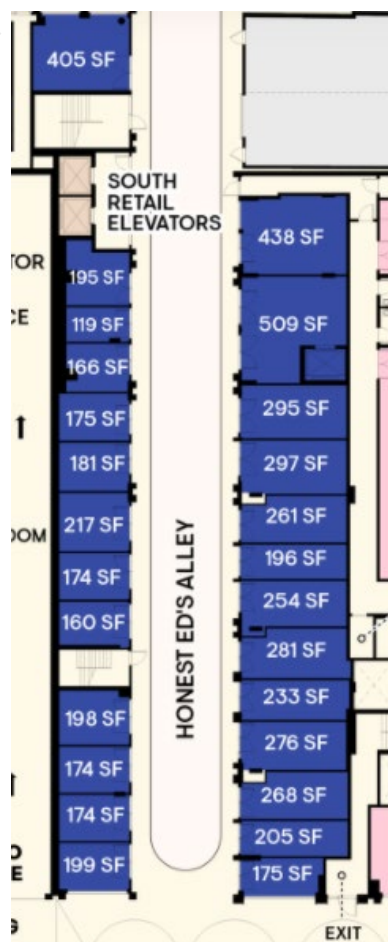
Figure 2-7: Rendering of micro retail street at Mirvish Village

2.3   RETAIL PROPERTY MARKET TRENDS – METRO VANCOUVER AND NEW WESTMINSTER

2.3.1 RETAIL PROPERTY SALES IN NEW WESTMINSTER

Table X below shows the retail property sales records in New Westminster since January 2019. There is considerable price-per-lot-square-foot variability depending on location.

- The prominent 728 Columbia Street Bank of Nova Scotia Building sold in January 2019 for nearly $1,000 per lot-foot. This high price is a function of the importance and quality of the building and the site's location in the downtown.

- The most recent transaction occurred in March 2021 in Uptown on Sixth Street, where a relatively small parcel currently occupied by a single-storey commercial building sold for $829 per lot square foot

Table 2-3: Recent Retail Property Sales in New Westminster

Date	Address	Size (sq ft)	Price	Sale Price per Lot Square Foot	2022 Assessment per lot square foot (Land Only)
Mar-2021	538 Sixth Street, New Westminster, B.C.	2,170	$ 1,800,000	$ 829	$772.81
Aug-2021	470 East Columbia Street, New Westminster, B.C.	5,107	$ 1,990,000	$ 390	$185.84
Nov-2019	Sixth Avenue, New Westminster (Hotel/restaurant)	4,644	$ 2,730,000	$ 588	
Jan-2019	728 Columbia Street (Scotiabank)	5,392	$ 5,300,000	$ 983	$515.95

Source: Western Investor reported sales, Avison Young BC Investment Review

2.3.2 COMMERCIAL LAND SALES – NEW WESTMINSTER

There are only three recorded sales of Commercial lands in New Westminster since 2017, shown in Table 3 below.

Table 2-4: Commercial Land Sales in New Westminster

Date	Address	Size (acre)	Price	Price per acre
Apr-2021	856 Boyd Street	0.22	$716,022	$ 3,225,300
Nov-2017	200 Front Street	0.81	$1,488,800	$ 1,847,100
Jun-2017	301 12th Street	2.34	$5,000,000	$ 2,134,900

Source: Altus Data Studio

The average sale prices per acre in years with records are:

- 2017: $2,144,768 per acre
- 2021: $2,134,900 per acre.

2.3.3 RETAIL LEASE RATE TRENDS IN METRO VANCOUVER

The following table summarizes the average net asking rent for retail properties reported in Metro Vancouver. Overall, the lease rate for the retail market has increased by 13.8%.

Table 2-5: Retail Lease Rate Trend, Metro Vancouver

2018	2019	2020	2021 YTD (Q3)	Percentage change
$ 29.34	$ 32.01	$ 33.82	$ 33.39	13.8%

Source: JIL Vancouver Retail Outlook Report (Fall 2021)

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2.3.4 RETAIL LEASE RATES – NEW WESTMINSTER

A survey of active commercial listings in New Westminster in Q4 2021 (16 in total) revealed average asking lease rates ranging from a low of $22 per square foot in Glenbrooke South, to a high of $37.21 in Glenbrooke North. Average lease rates were $32.21 per square foot.

Neighbourhood	Average Size (sq.ft.)	Average Lease Rate ($/sq.ft./yr)
Connaught Heights	4,238	$35.70
Downtown	1,361	$32,57
Glenbrooke North	566	$37.21
Glenbrooke South	1,017	$22.00
Sapperton	1,325	$27.38
Uptown	2,952	$35.00

It is important to keep in mind that the rental rates listed above are *asking rents* and may differ from actual rents paid by commercial tenants. More often then not, there are **tenant inducements** built into commercial lease agreements in order to incent a tenant to sign a lease. These inducements can be used to achieve a higher basic rent for the landlord (i.e., the rate that goes into the lease document), which is important for the purposes of re-sale or financing. Common types of tenant inducements include one of, or combinations of, the following:

- Free rent periods (or rent abatement periods)
- Leasehold improvements (or tenant improvements)
- Cash allowance paid to the tenant

Different forms of tenant inducement result in different accounting and tax treatments.

The average leas rates quoted are either 'gross rents' (although this is not common in commercial leasing), or 'triple net' rents. The latter is defined as the effective 'all-in' rental rate that would encompass the "basic rent", plus any "additional rents" that are passed along from the landlord to the tenant.

Basic Rent:	Sometimes terms 'minimum rent'. This is the per-square-foot per -annum calculation that is the negotiated rent paid to the property owner, not including tenant inducements.
Additional Rent	This can comprise any of the following items: taxes, insurance, utilities, and operating expenses.

3.0 RETAIL & SERVICE COMMERCIAL SUPPLY REVIEW

An inventory of all retail and service commercial businesses across the City of New Westminster has been prepared by way of extensive walking / driving field surveys, aided by GIS data outlining building footprint sizes, building heights, and in some cases, the sizes of individual commercial units. The surveys were conducted over a two-month period in the summer / fall of 2021. Each data point has been reviewed, categorized, and analysed to determine current spatial patterns across the City, and in each of the City's retail areas. The following data points were collected through this field survey:

- Business name and address
- Business category (detailed NAICS code)
- Business category 'cluster' (USL customized)
- Size of building / units within building (ground floor are second floor)
- Estimated floor area of each retail / commercial unit

3.1 KEY DEFINITIONS

3.1.1 RETAIL COMMERCIAL CATEGORIES

While each data point has been assigned a category based on the North American Industrial Classification (NAICS) coding system, we have grouped these categories into higher-level clusters for ease of reporting and discussion. These higher-level category clusters are noted below.

Table 3-1: General Retail-Commercial Category Definitions

Category Cluster	What is Included?
Arts, Culture, Entertainment, & Recreation	Performing arts venues and schools; fitness, recreation sports centres (gym, fitness, health); gambling; other amusement/ recreation.
Comparison Retail	Books, hobbies, toys, games, clothes, accessories, luggage, electronics, appliances, furniture, gifts, jewellery, lawn/garden/hardware, office supplies, pet store, shoe store, sporting goods, general merchandisers.
Convenience Retail	Grocery stores, specialty food stores (e.g., bakeries, fish markets, green grocers), convenience stores, liquor stores, pharmacies, florists, optical goods, supplements, gas station convenience stores.
Restaurant Food & Beverage	Full-service restaurants, limited service restaurants (quick-serve), drinking places.
Service Commercial	Financial, legal, insurance, vehicle, real estate, photography, health, employment, travel, security, educational, social, hair, laundry / dry cleaning, tattoo/piercing, funeral, pet care, automotive
Vacant	Vacant and committed (i.e., business waiting for permits); Vacant and for sale / lease Vacant and under construction.

3.1.2 SERVICE COMMERCIAL SUB-CATEGORIES

Below is a more detailed breakout of the 'service commercial' category, and its component category clusters.

Table 3-2:   **Service Commercial Category Cluster Definitions**

Category	What is Included?
Automotive Services	Garages, auto service centres
Commercial Services	Photography, repair + maintenance, pet care, photography, printing
Education + Training Services	Technical schools, trades training, athletic instruction (e.g., gymnastics, martial arts, yoga)
Finance, Insurance, Real Estate (FIRE) Services	Banks, insurance brokers, real estate agencies, other consumer lending services
Health Services	Doctors, dentists, optometrists, physiotherapists, mental health, chiropractic, other
Personal Services	Hair care / esthetics, ear piercing, hair removal, massage, sauna, tattoo, dry cleaning, laundry
Professional Services	Accounting, tax preparation, bookkeeping, payroll services
Social Services	Childcare, family services, relief services, vocational services.

3.1.3 CHAIN AND INDEPENDENT BUSINESSES

Each business in the inventory has also been classified as a 'chain' business, an 'independent' business, or either a government entity or non-profit.

There are a wide variety of definitions of 'chain' and 'independent' used across North America. For this study, we have adopted a slightly modified Statistics Canada definition of a chain business, the latter defining chains as any business organization operating **four or more** outlets in the same industry class under the same legal ownership at any time during the survey year. To this we also include franchise businesses, which are those businesspersons or corporate entities that have been granted a contractual permit for the sale of a product (or service) using a given trade name, or operating within a specific territory, and / or in a specified manner.

3.1.4 ANCHOR USES AND ATTRACTORS

The term 'anchor' or 'anchor' use is used throughout this report when describing certain businesses or other entities within New Westminster's commercial agglomerations. An anchor use, or alternately a "major attractor" or "activity generator", is defined as a retail or non-retail use (or uses) that drive foot traffic and business to other nearby uses in a commercial area. These uses are often critical for sustaining smaller, less specialized or 'destination-driven' shops and services in an area. While anchors are typically retail uses, there are other uses that can be effective drivers of traffic such as community centres, libraries, or schools.

Examples of anchors within the context of commercial precincts are as follows:

- **Grocery Stores and / or General Merchandisers:** a full-line grocery store (e.g., Safeway, Save-On), a general merchandiser such as Wal-Mart or London Drugs, or even a pharmacy with a sizeable retail grocery and general merchandise component like Shoppers Drug Mart, will draw regular foot traffic as customers return on a regular basis to buy day-to-day convenience goods. Often these businesses benefit from greater brand recognition and advertising resources, which can positively affect their ability to draw customers. If these businesses are well placed in a retail area, they will both draw customers into an area and provide foot traffic to other stores. The loss of a grocery store or general merchandise anchor can have serious knock-on impacts for shopping areas.

- **Merchandise or Customer Type Clusters:** the concentration of many storefronts in a single retail category (e.g., formalwear, furniture) or offering good / services targeted to a specific audience (e.g., the Filipino or Ethiopian community) can also have an anchoring effect in a commercial area. Customers are drawn to these clusters, knowing that they will have the options they seek, all within a relatively short distance of one another. Examples of such clustering in New Westminster include bridal and formalwear shops in the Downtown, and ethnic business clusters along 12th.

- **Cultural, Civic, Institutional, Entertainment:** the presence of a community centre with frequent, well-targeted programming, a library, or a cultural venue like a theatre, can act as either a primary or complimentary activity driver, and can make an area a destination. The Anvil Centre, for instance, attracts evening patronage to the area, to the benefit of other surrounding businesses.[4] The loss of an institution can have negative effects for an area. For instance, the closure of a busy school can result in sales declines for some nearby businesses.[5]

3.1.5 VACANCY

Through the field survey process, we have noted instances of vacant storefronts and buildings across the City. The definition of 'vacancy' used in this study is as follows:

> *Any storefront in a commercial area that is unoccupied, regardless of lease status or permitting status, based exclusively on field observations.*

There are a variety of ways that vacancy could be classified:

- The International Council of Shopping Centres (ICSC) defines vacancy as "the square footage that is unoccupied even if leases are signed and rents are being collected, expressed as a percentage of total occupancy area of each store category."

- The shopping centre industry typically follows the ICSC definition. However, a 2013 article published by Ryerson Center for the Study of Commercial Activity noted that few companies

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[4] See: Jones, Ken. Ryerson University Centre for the Study of Commercial Activity (2004). *Spillover Effects of Investments in Cultural Facilities.*
[5] This phenomenon was noted in the City of Vancouver, where the closure of Sir Guy Carleton Elementary School on Kingsway led to a noticeable drop in sales volumes for some businesses that once drew morning and afternoon sales from parents dropping off and picking up their children.

report vacancy by store category (per ICSC definition). Rather, vacancy is reported as a function of <u>total floor area</u>, with the following variations:

- o Shopping centre owners and developers report vacancy on a square footage basis for unoccupied space (including vacant space still subject to lease payments, so technical non-leasable) and report it against the gross leasable area of their project.

- o Leasing industry professionals usually report vacancy as unoccupied space *that is leasable* (i.e.., not currently paying rent) and report it against gross leasable area.

- When collecting vacancy data, there must be clarity on what definition is being used. From the perspective of a shopper or neighbourhood resident, an empty storefront has the same overall negative effect on the quality of the experience in the area regardless of whether it is vacant and leasable or vacant and encumbered in some way from hosting a new tenant.

- From the perspective of business area health and vitality, however, the difference between vacant and leasable vs. vacant and encumbered could be important.

As a rule of thumb, vacancy rates of around 5-7% on a unit-count basis are usually a good indicator of a reasonably healthy commercial area, and up to 10% can still be acceptable in some cases. This type of vacancy, usually termed "frictional vacancy", can allow for business churn and filtering without unduly impacting the overall health of a precinct. Once vacancy rates start to climb above 10%, this is often an indicator of an area that is struggling to maintain vibrancy.

3.2 CITY-WIDE INVENTORY SUMMARY

The City's total floor area within retail-commercial areas is comprised of approximately **4.39 million square feet across 1,266 units**. Of this, there are 247,000 square feet of vacant floor space across 111 units, for a vacancy rate of 10.6% on a unit count and 7.7% on a floor area basis, respectively. Note that these inventory figures pertain to <u>built floor area only</u>, and do not account for vacant commercially zoned lots. Further, where commercially zoned lands are currently home to non-commercial uses (e.g., apartment building with no ground-level retail), we have excluded that floor area from the commercial space inventory.

Of the 4.39 million square feet noted above, the breakdown between retail / commercial floor area, general employment floor area, and non-retail (primarily residential) floor area is as follows (see Table 4-3).:

Table 3-3: City-Wide Inventory, All Commercial Areas

Broad Category	# Units	Floor Area (sq.ft.)	% of Total
Retail – Commercial	**1,046**	**3,221,442**	**73.3%**
Employment	76	767,487	17.5%
Residential	144	404,685	9.2%
TOTAL	1,266	4,393,614	100%

Source: USL Field Survey

The commercial space 'universe' for the purpose of this analysis is the 3,221,442 square feet / 1,046 commercial units noted on the first line of the table above.

Table 4-4 below provides a breakdown of the commercial floor area City-wide, by broad commercial category, followed by brief commentary. This is elaborated upon later in the document.

Table 3-4: City-Wide Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	30	2.9%	234,115	7.3%
Comparison Retail	158	15.1%	807,045	25.1%
Convenience Retail	111	10.6%	468,272	14.5%
Restaurant Food & Beverage	212	20.3%	395,506	12.3%
Service Commercial	424	40.5%	1,069,375	33.2%
Automotive Services	8	0.8%	14,473	0.4%
Commercial Services	44	4.2%	98,450	3.1%
Education + Training	50	4.8%	284,379	8.8%
Finance, Insurance, Real Estate (FIRE)	51	4.9%	149,851	4.7%
Health Services	103	9.8%	279,202	8.7%
Personal Services	122	11.7%	134,455	4.2%
Professional Services	26	2.5%	42,056	1.3%
Social Services	20	1.9%	66,509	2.1%
Vacant	111	10.6%	247,129	7.7%
Retail-Commercial Totals	**1,046**		**3,221,442**	
Retail-Commercial net of Arts/Culture			**2,987,327**	

- **Arts, Culture, Entertainment, Recreation:** while there are a number of notable arts / culture venues across the City, there is room for expanded breadth and depth in this category.

- **Comparison Retail:** an outsized proportion of the comparison retail floor area is niche focused on specialty retail items (e.g., bridal, formal wear).

- **Convenience Retail:** at 14.5% of total floor area, this appears at first blush to be relatively low for a City of this size. However, given the proximity of many New Westminster residents to convenience retail offerings in Burnaby, this is generally reasonable.

- **Restaurant Food & Beverage:** at 12.3% of floor area and 20% of total units, this is considered a relatively low proportion for a city of this size.

- **Service Commercial**: at 33.2% of floor area and over 40% of business count, this is generally reasonable given the extent and growth of both Downtown residential, and the presence of large health services clusters.

- **Vacant**: at 7.7% of total floor area and 10.6% of units, this is (generally speaking) higher than desirable from a 'frictional vacancy' perspective.

The section below provides a breakdown of the retail inventory in each of the City's distinct sub-areas and clusters.

3.3   INVENTORY BY SUB-AREA

3.3.1   DOWNTOWN

Downtown New Westminster, with its contiguous retail streets, walkable blocks, character buildings, growing residential population, and rapid transit accessibility, is one of the Metro Vancouver region's more compelling downtowns. As a retail and service commercial neighbourhood, Downtown is the City's primary food and culture destination, and offers a unique mix of shops and services that cater to residents across the City, along with those coming to New Westminster from elsewhere to work, shop, dine, or recreate.

Figure 3-1: Downtown Retail-Commercial Inventory
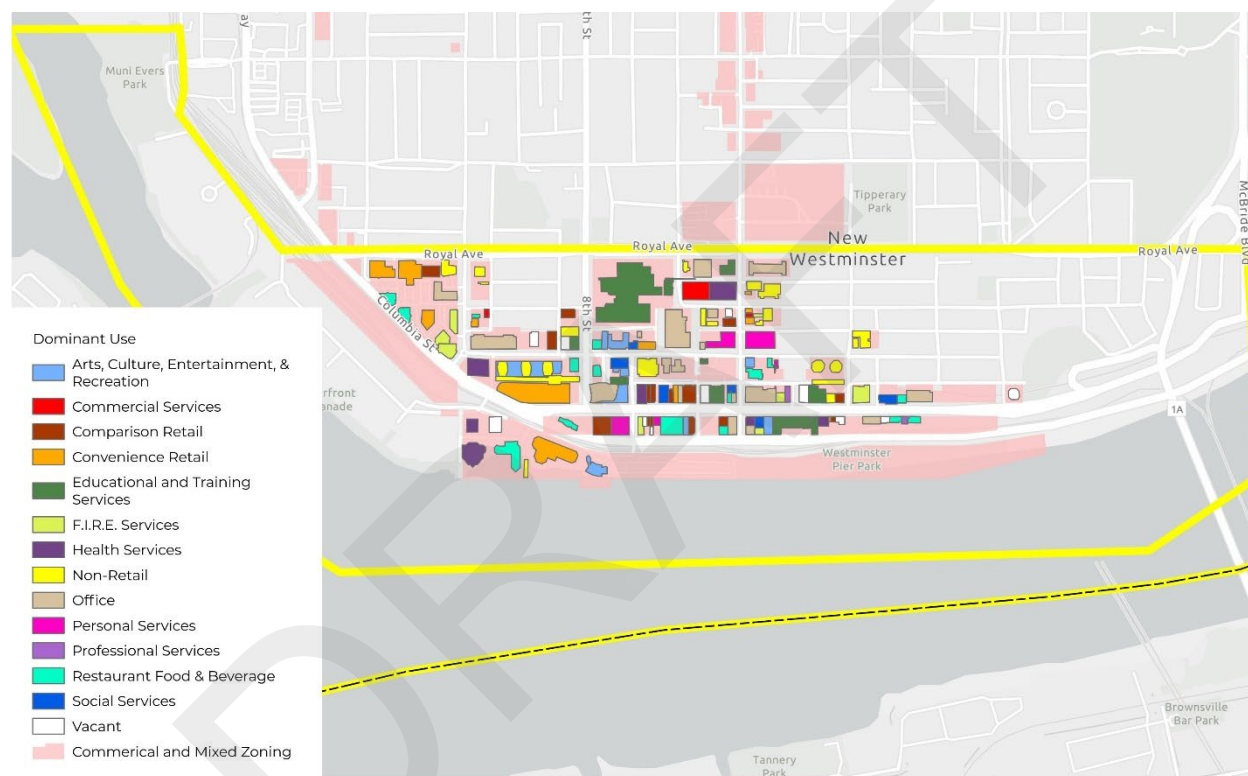
The Downtown contains nearly 990,000 square feet of retail commercial floor area across 314 units. The unit count represents the number of vacancies plus active businesses at the time of survey (i.e., the effective unit count), however the 'true' unit count may fluctuate up or down over time (even with no changes to built product inventory) depending on how spaces in some buildings are demised. For instance, in some cases an individual business operates in a space with multiple doorways to the street; that space could be re-demised to accommodate multiple businesses in the future. This is true for other retail areas beyond the Downtown as well.

The areas of commercial activity in the Downtown extend from approximately Royal. Avenue and Columbia Street in the southwest, to Columbia and Elliot Street in the northeast, and extends between the waterfront and Royal Avenue. The longest stretches of contiguous active commercial frontages are along Columbia, Carnarvon, 6th and 8th Streets. There are also notable commercial businesses accessed off Front Street. The slope of the Downtown area is such that there are many buildings with access on

two sides, allowing for additional opportunities for 'ground floor' commercial uses, with access off parallel or perpendicular streets.

From a commercial mix standpoint, Downtown is heavily weighted to a variety of service commercial categories, most notably personal services, and health services (9.6% and 7% on a unit count basis). The education service sector has an outsized proportion of total Downtown floor area (20%) primarily due to the partial occupancy of the space by the Purpose Secondary School.

Table 3-5: Downtown Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	19	6.1%	115,968	11.7%
Comparison Retail	45	14.3%	115,412	11.7%
Convenience Retail	30	9.6%	130,132	13.1%
Restaurant Food & Beverage	69	22.0%	132,018	13.3%
Service Commercial	115	36.6%	411,761	41.6%
Automotive Services	0	0.0%	0	0.0%
Commercial Services	14	4.5%	50,540	5.1%
Education + Training	19	6.1%	199,015	20.1%
Finance, Insurance, Real Estate (FIRE)	13	4.1%	48,542	4.9%
Health Services	22	7.0%	36,600	3.7%
Personal Services	30	9.6%	29,160	2.9%
Professional Services	8	2.5%	16,415	1.7%
Social Services	9	2.9%	31,489	3.2%
Vacant	36	11.5%	84,558	8.5%
Retail-Commercial Totals	**314**		**989,851**	
Retail-Commercial net of Arts/Culture	295		873,883	

Source: USL Field Survey, 2021

Downtown's commercial landscape is characterized to a large degree by its independent businesses across a range of retail and service categories. Over 66% of Downtown businesses are independents, encompassing nearly 56% of the total floor area. Downtown is also home to a variety of non-profits, educational institutions, and social / vocational service providers.

Table 3-6: Downtown Retail-Commercial Business Type Classification by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	1	16	2
Comparison Retail	6	38	1
Convenience Retail	8	20	2
Restaurant Food & Beverage	20	49	0
Service Commercial	18	85	12
TOTAL	**53**	**208**	**17**
% of Total	**19%**	**75%**	**6%**

- Arts, culture, and entertainment / recreation businesses account for just over 6% of commercial units and nearly 12% of downtown commercial floor area. While these are relatively small

proportions of the overall totals, these figures represent half of the floor area in this category across the City, and over 60% of the businesses in these categories.

- Comparison retail accounts for over 14% of retail commercial businesses and nearly 12% of downtown commercial floor area. These figures represent 28% and 14% of the City-wide totals, respectively. Within the comparison retail grouping, specialty clothing stores such as bridal wear and formal wear account for nearly 35% of the total floor area.

- Convenience retail accounts for nearly 10% of downtown retail units and 13% of retail floor area. These represent 27% and 28% of city-wide totals, respectively. The most notable sub-categories are retail grocery (4 businesses comprising 72,000 square feet), pharmacy (4 business, 26,000 square feet), and health / personal care (8 businesses, 14,000 square feet).

- The restaurant food and beverage category is the second-most predominant category in downtown on a unit count basis, with 69 active businesses. 62% of the businesses are categorized as quick-service restaurants (e.g., fast food and takeout), with the balance as full-service. Downtown is home to 33% of the City's restaurant businesses.

- The broad service commercial category is by far the predominant business grouping in the downtown, both on a unit count and floor area basis (36.6% and 41.6% of totals, respectively).

- The vacancy rate in the downtown is on the high end (11.5% on unit count and 8.5% on floor area).

- Altogether, retail commercial businesses in the Downtown account for 30% of such businesses city-wide, and 31% of floor area.

Table 3-7: Downtown Retail-Commercial Units and Floor Area as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	63%	50%
Comparison Retail	28%	14%
Convenience Retail	27%	28%
Restaurant Food & Beverage	33%	33%
Service Commercial	27%	39%
Automotive Services	0%	0%
Commercial Services	32%	51%
Education + Training	38%	70%
Finance, Insurance, Real Estate (FIRE)	25%	32%
Health Services	21%	13%
Personal Services	25%	22%
Professional Services	31%	39%
Social Services	45%	47%
Vacant	32%	34%
Retail-Commercial Totals	**30%**	**31%**

URBAN
SYSTEMS

3.3.2 UPTOWN

Uptown is, for many, the heart of day-to-day retail activity in New Westminster. The area serves the needs of its immediate neighbourhood, but also draws people in from many other neighbourhoods for both day-to-day convenience shopping and destination comparison goods. The area also serves a fairly sizeable daytime working population.

Figure 3-2: Uptown Retail-Commercial Inventory
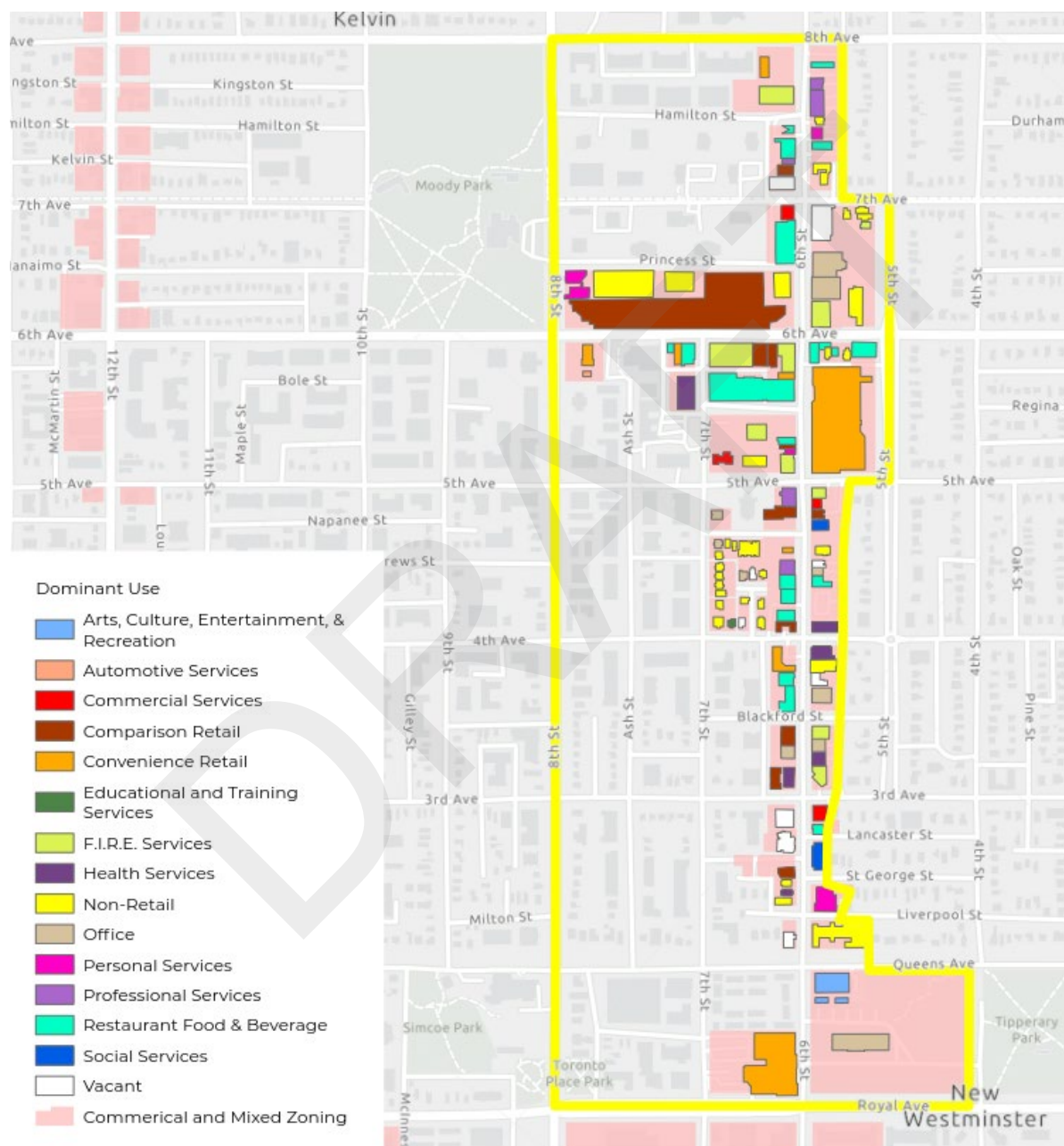
The north-south "spine" of Uptown is, on a business count and floor area basis, the second-most prominent commercial area in New Westminster. It is characterized primarily by a 6-block stretch of street retail extending along 6th Street from Royal Avenue to 8th Avenue. There are also commercial 'offshoots' along the Avenues in some areas, most notably along 6th Avenue where a 2-block extension

to the southwest is home to Royal Centre on one side and a variety of single and multi-level commercial properties along the other. There are also notable businesses along 6th Avenue to the northeast, including a relatively new mixed-use property at the corner of 6th Avenue and 5th Street. Altogether, Uptown is home to 29% of the City's commercial businesses and 25% of total floor area.

Overall, the Uptown commercial mix across the major categories is quite well balanced, with the exception perhaps of restaurant food and beverage, in which the 11.5% of total floor area is relatively low given the area's context and surrounding population density. We would expect this figure to be at or above 15%. Service commercial at nearly 40% is within the range we would expect, including the distribution between health services, FIRE, personal services, and the other categories.

While independent businesses account for over 60% of storefronts in Uptown, there is a larger chain presence here than in Downtown. This is particularly the case in the Restaurant Food & Beverage and Convenience Retail categories, where chain businesses account for 37% and 45% of businesses, respectively.

Table 3-8: Uptown Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	4	1.3%	17,937	2.3%
Comparison Retail	31	10.4%	188,825	23.7%
Convenience Retail	31	10.4%	161,754	20.3%
Restaurant Food & Beverage	59	19.7%	91,213	11.5%
Service Commercial	151	50.5%	297,293	37.3%
Automotive Services	1	0.3%	837	0.1%
Commercial Services	16	5.4%	18,860	2.4%
Education + Training	12	4.0%	18,595	2.3%
Finance, Insurance, Real Estate (FIRE)	26	8.7%	81,675	10.3%
Health Services	38	12.7%	106,076	13.3%
Personal Services	40	13.4%	42,409	5.3%
Professional Services	15	5.0%	22,841	2.9%
Social Services	3	1.0%	6,000	0.8%
Vacant	23	7.7%	38,957	4.9%
Retail-Commercial Totals	**299**		**795,979**	
Retail-Commercial net of Arts/Culture	**295**		**778,042**	

Source: USL Field Survey, 2021

Table 3-9: Uptown Retail-Commercial Business Type Classification by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	0	0	4
Comparison Retail	11	18	2
Convenience Retail	14	17	0
Restaurant Food & Beverage	22	36	1
Service Commercial	38	103	10
TOTAL	**85**	**174**	**17**
% of Total	**31%**	**63%**	**6%**

Uptown plays a prominent City-wide role in the following categories:

- F.I.R.E: more than half of the City's businesses in this sector operate in Uptown.
- Professional Services: nearly 60% of the City's businesses in this sector are in Uptown

Table 3-10: Uptown Retail-Commercial Units and Floor Area as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	13.3%	7.7%
Comparison Retail	19.6%	23.4%
Convenience Retail	27.9%	34.5%
Restaurant Food & Beverage	27.8%	23.1%
Service Commercial	35.6%	27.8%
Automotive Services	12.5%	5.8%
Commercial Services	36.4%	19.2%
Education + Training	24.0%	6.5%
Finance, Insurance, Real Estate (FIRE)	51.0%	54.5%
Health Services	36.9%	38.0%
Personal Services	32.8%	31.5%
Professional Services	57.7%	54.3%
Social Services	15.0%	9.0%
Vacant	20.7%	15.8%
Retail-Commercial Totals	**29%**	**25%**

Source: USL Field Survey 2021

3.3.3 12TH STREET

The 12th Street commercial areas extend from 10th Avenue in the north to approximately 3rd Avenue in the south. The core of the precinct is the 4-block stretch between 6th and 10th Avenue (although predominantly north of 6th Avenues. This area is largely characterized as a service-commercial and neighbourhood retail precinct, with a sizeable sub-set of businesses serving niche ethnic retail markets. Overall, the 12th Street area as depicted in Figure 8 below is comprised of 134 businesses and over 181,000 square feet of combined floor area.

Figure 3-3: 12th Street Retail-Commercial Inventory
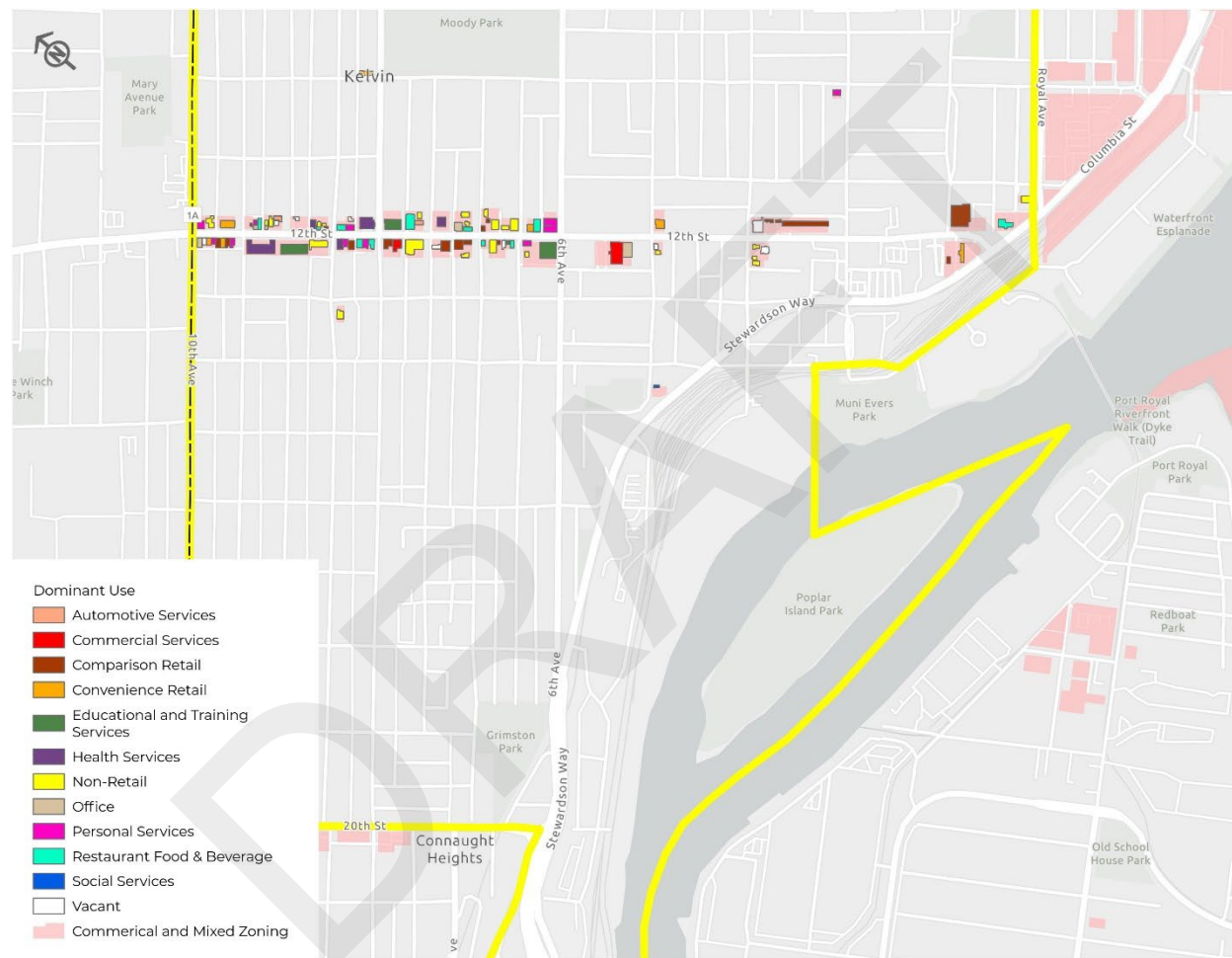
The predominant category on a unit and floor area basis is service commercial. Within this, there are a number of sub-categories within which 12th Street plays a particularly prominent city-wide role:

- Automotive services: 12th is home to 25% of the city's businesses in this category.

- Personal services: home to nearly 20% of units and 22% of floor area in this category.

It is also notable that 12th Street is home to a substantial proportion of the City's comparison retail businesses (22% of city-wide totals). There is a strong mix within this category, with an ethnic specialty focus.

The convenience retail category is somewhat under-represented compared to what we may expect from a neighbourhood-serving commercial high street. However, these relatively lower totals are

understandable given the relative proximity of most neighbourhood residents to both Uptown and southeast Burnaby.

Table 3-11: 12th Street Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	1	0.7%	1,300	0.5%
Comparison Retail	35	26.1%	57,449	22.5%
Convenience Retail	14	10.4%	26,165	10.2%
Restaurant Food & Beverage	21	15.7%	46,484	18.2%
Service Commercial	48	35.8%	100,305	39.2%
Automotive Services	2	1.5%	4,592	1.8%
Commercial Services	5	3.7%	18,200	7.1%
Education + Training	5	3.7%	17,360	6.8%
Finance, Insurance, Real Estate (FIRE)	2	1.5%	4,300	1.7%
Health Services	7	5.2%	18,707	7.3%
Personal Services	24	17.9%	29,176	11.4%
Professional Services	1	0.7%	1,000	0.4%
Social Services	2	1.5%	6,970	2.7%
Vacant	15	11.2%	23,972	9.4%
Retail-Commercial Totals	**134**		**255,675**	
Retail-Commercial net of Arts/Culture	**133**		**254,375**	

Source: USL Field Survey, 2021

12th Street is populated almost exclusively by independent businesses, with only an 8% presence of chain businesses.

Table 3-12: 12th Street Retail-Commercial Business Type Classification by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	0	1	0
Comparison Retail	3	32	0
Convenience Retail	3	11	0
Restaurant Food & Beverage	3	18	0
Service Commercial	0	46	0
TOTAL	**9**	**108**	**0**
% of Total	**8%**	**92%**	

12th Street plays a relatively outsized city-wide role in the following categories:

- Automotive services: home to 25% of businesses in this category
- Comparison retail: home to 22% of businesses in this category

**Table 3-13: 12th Street Retail-Commercial Units and Floor Area as % of City-Wide, by Category**

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	3.3%	0.6%
Comparison Retail	22.2%	3.4%
Convenience Retail	12.6%	3.8%
Restaurant Food & Beverage	9.9%	10.3%
Service Commercial	11.3%	7.4%
Automotive Services	25.0%	31.7%
Commercial Services	11.4%	18.5%
Education + Training	10.0%	6.1%
Finance, Insurance, Real Estate (FIRE)	3.9%	2.9%
Health Services	6.8%	6.7%
Personal Services	19.7%	21.7%
Professional Services	3.8%	2.4%
Social Services	10.0%	10.5%
Vacant	13.5%	6.4%
Retail-Commercial Totals	**13%**	**6%**

Source: USL Field Survey 2021

3.3.4 QUEENSBOROUGH

The Queensborough retail area is split up into three distinct sub-areas:

- Large-format retail center at Queensborough Landing

- A neighbourhood-oriented retail cluster along Ewen Avenue at Gifford Street

- A few small businesses located at the east end of Ewen Avenue, east of Stanley Street.

Figure 3-4: Queensborough Retail-Commercial Inventory
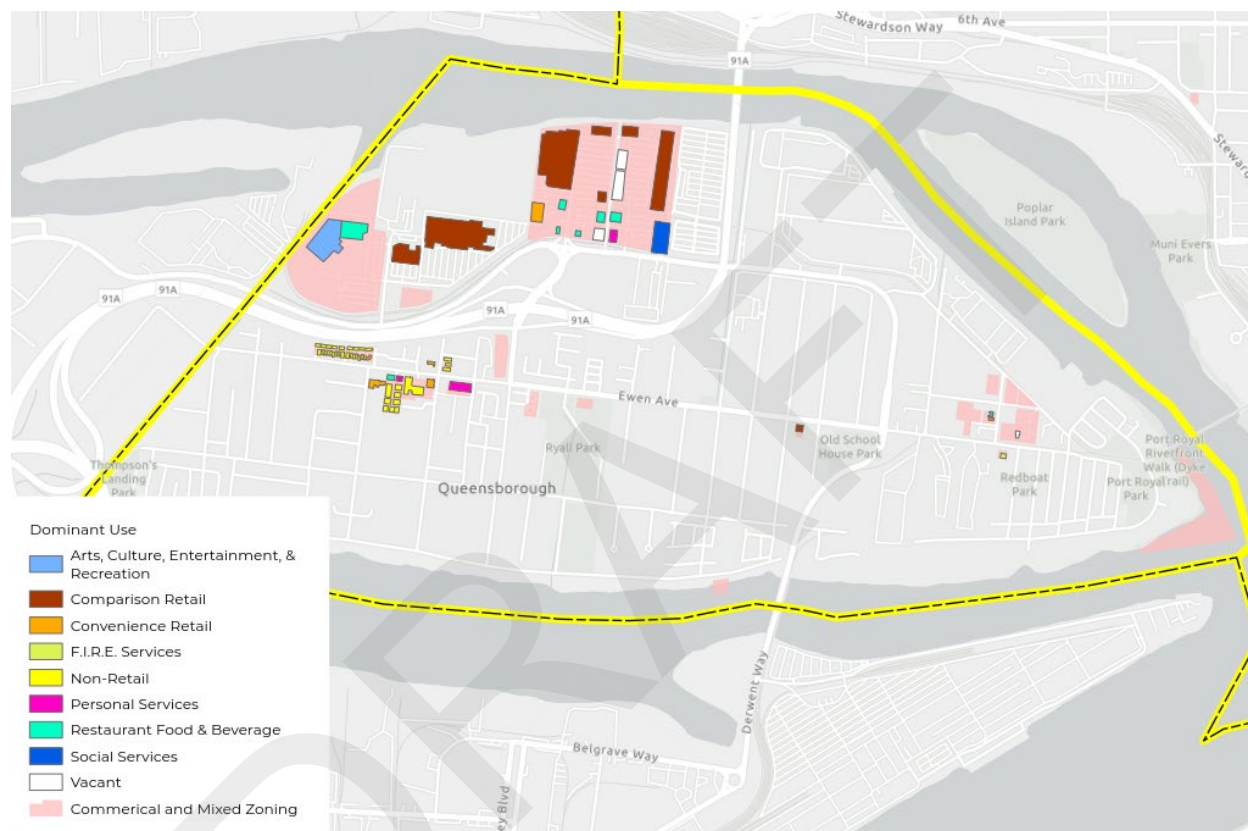
Altogether, Queensborough is home to 89 businesses spanning nearly 682,000 combined square feet. This includes large-format retailers at Queensborough landing such as Lowe's (139,000 square feet), Walmart Supercentre (132,000 square feet), and Value Village (40,000 square feet), and the Starlight Casino (>100,000 square feet, including restaurant).

Given the presence of Queensborough Landing, there is a far greater instance of chain stores in Queensborough; the chain-to-independent ratio is nearly 50/50. Within the comparison retail category, most of the businesses are chains. The majority of these are outlets selling apparel, accessories, and home wares.

The service commercial category is heavily independent dominated, primarily comprised of personal service providers such as nail and hair salons, laundromats and child care services. The chains within this category operate in the educational services and financial services sub-sectors.

Table 3-14: Queensborough Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	2	2.2%	91,110	13.4%
Comparison Retail	18	20.2%	383,925	56.3%
Convenience Retail	9	10.1%	23,353	3.4%
Restaurant Food & Beverage	22	24.7%	60,714	8.9%
Service Commercial	19	21.3%	43,934	6.4%
Automotive Services	0	0.0%	0	0.0%
Commercial Services	1	1.1%	1,050	0.2%
Education + Training	2	2.2%	5,875	0.9%
Finance, Insurance, Real Estate (FIRE)	3	3.4%	5,634	0.8%
Health Services	3	3.4%	6,600	1.0%
Personal Services	9	10.1%	14,775	2.2%
Professional Services	0	0.0%	0	0.0%
Social Services	1	1.1%	10,000	1.5%
Vacant	19	21.3%	78,925	11.6%
Retail-Commercial Totals	**89**		**681,961**	
Retail-Commercial Net of Arts/Culture	87		590,851	

Source: USL Field Survey 2021

Table 3-15: Queensborough Retail-Commercial Business Type Classification, by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	1	1	0
Comparison Retail	15	2	1
Convenience Retail	1	8	0
Restaurant Food & Beverage	13	9	0
Service Commercial	3	14	2
TOTAL	**33**	**34**	**3**
% of Total	**49%**	**51%**	

There is currently a heavy focus on destination comparison retail in Queensborough, with that category accounting for over 56% of total floor area, representing nearly 48% of *City-wide* floor area in that category grouping. This predominance is likely to shift over time, given the combination of increasing competitive pressures from other, newer regional destination draws (e.g., MacArthur Glenn in Richmond, Tsawwassen Mills in Delta), the continued shift to online and omni-channel retailing across multiple categories (as previously outlined), and associated pressures for conversion and intensification of under-performing commercial assets to warehousing / distribution uses within close proximity to large and growing population centres. Current vacancy rates in Queensborough (21.3% on a unit-basis, 11.6% on a floor-area basis) are likely indicative of that broader transition that is already underway, which will only increase pressure for re-imagining significant portions of Queensborough Landing over the coming decade and beyond.

Recognizing that the heyday of the large-format power centre is now in the past, SmartCentres REIT (owners of Queensborough Landing) are actively evaluating their holdings nation-wide, looking for

opportunities to intensify and redevelop their properties over time. While there are no explicit plans in place for Queensborough landing yet (insofar as can be identified through readily-available documents), the Trust's guiding strategic direction calls for (re)development of parcels within their existing portfolio, with a focus on multi-family residential, seniors' housing, office, and self storage uses.[6] We anticipate that Queensborough Landing intensification and / or redevelopment will be actively explored by the REIT in the coming decade, with timelines driven in part by vacancy rate trends and / or a future loss of one of their major anchor tenants.

Table 3-16: Queensborough Retail-Commercial Units and Floor Area as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	6.7%	38.9%
Comparison Retail	11.4%	47.6%
Convenience Retail	8.1%	5.0%
Restaurant Food & Beverage	10.4%	15.4%
Service Commercial	4.5%	4.1%
Automotive Services	0.0%	0.0%
Commercial Services	2.3%	1.1%
Education + Training	4.0%	2.1%
Finance, Insurance, Real Estate (FIRE)	5.9%	3.8%
Health Services	2.9%	2.4%
Personal Services	7.4%	11.0%
Professional Services	0.0%	0.0%
Social Services	5.0%	15.0%
Vacant	17.1%	31.9%
Retail-Commercial Totals	**9%**	**21%**

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[6] SmartCentres Real Estate Investment Trust 2020 Annual Report.

3.3.5 SAPPERTON

Sapperton serves a dual role as the local shopping street for its immediate residential neighbourhood, and as a regional health services precinct built around the expanding Royal Columbia Hospital. The latter is a major and growing hub of employment and patient activity, both of which drive opportunities for retail and service businesses in the surrounding precinct, primarily in the food-and-beverage and convenience retail categories.

Figure 3-5: Sapperton Retail-Commercial Inventory
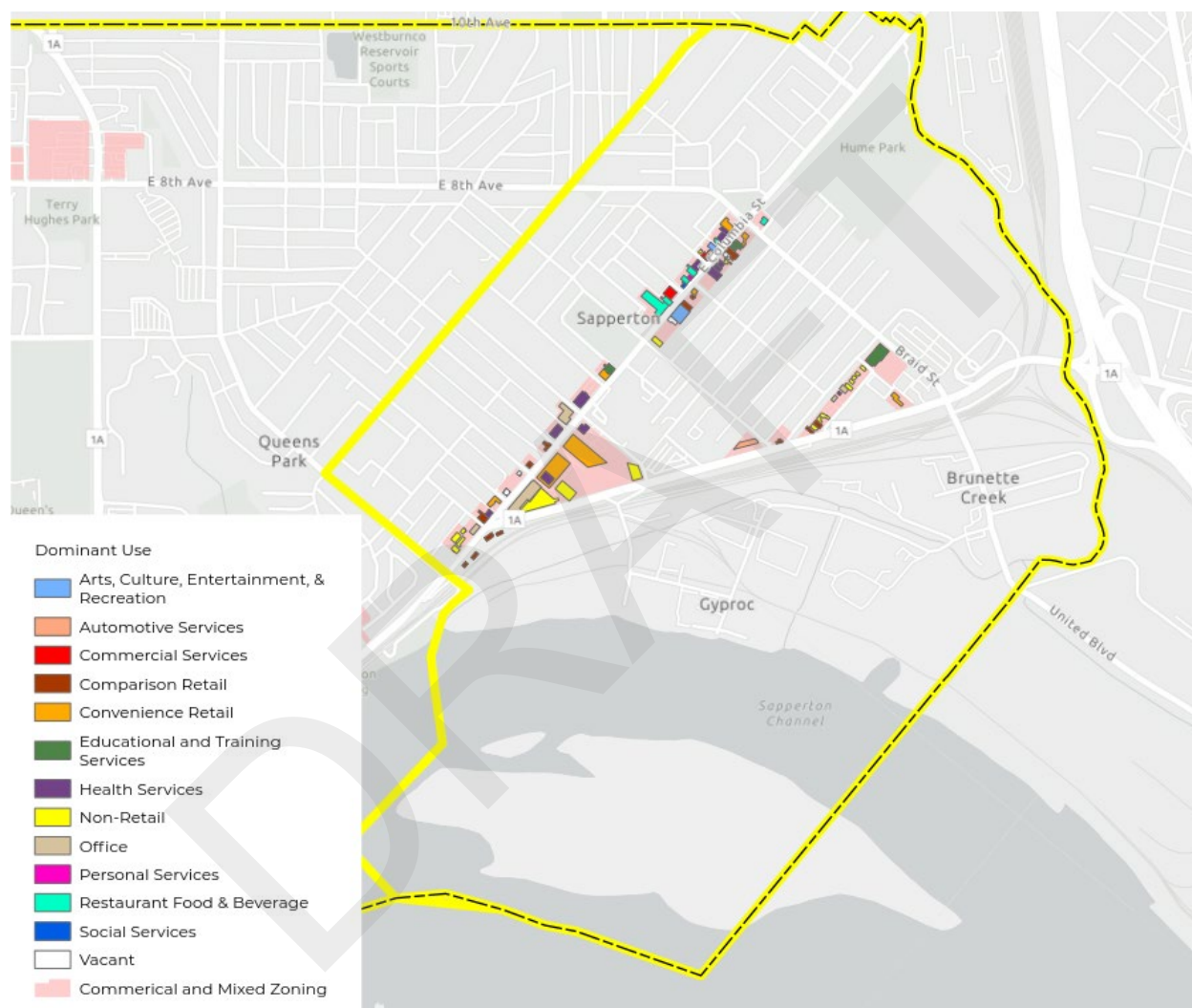
From a tenant mix standpoint, Sapperton today is characterized by its niche comparison goods offerings in a variety of categories (e.g., sporting goods, hobbies, music), the significant presence of health services, and core convenience retail offerings to serve the surrounding neighbourhoods. The area is heavily service-commercial oriented (50% of total floor area), which is around what we might expect given the presence of both 'typical' service commercial offerings for the resident population, plus the more destination services that have emerged around the hospital precinct. The latter can be seen in the 21.5% unit weighting in 'health services' amongst the service commercial category. Sapperton also has a relatively strong offering of restaurant food & beverage options (nearly 20% of total units), including many independent and / or smaller regional chains.

Table 3-17: Sapperton Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	3	2.5%	6,000	1.9%
Comparison Retail	20	16.5%	40,734	12.8%
Convenience Retail	13	10.7%	60,602	19.1%
Restaurant Food & Beverage	24	19.8%	40,918	12.9%
Service Commercial	52	43.0%	158,381	49.9%
Automotive Services	4	3.3%	8,600	2.7%
Commercial Services	2	1.7%	3,800	1.2%
Education + Training	7	5.8%	32,434	10.2%
Finance, Insurance, Real Estate (FIRE)	3	2.5%	6,000	1.9%
Health Services	26	21.5%	96,726	30.5%
Personal Services	9	7.4%	9,135	2.9%
Professional Services	0	0.0%	0	0.0%
Social Services	1	0.8%	1,686	0.5%
Vacant	9	7.4%	10,916	3.4%
Retail-Commercial Totals	**121**		**317,552**	
Retail-Commercial Net of Arts/Culture	118		**311,552**	

Source: USL Field Survey 2021

Sapperton boasts a nearly 80/20 split of independent vs. chain businesses. All comparison retail offerings are independents, as are the vast majority of service commercial providers.

Table 3-18: Sapperton Retail-Commercial Business Classification by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	0	3	0
Comparison Retail	0	20	0
Convenience Retail	7	6	0
Restaurant Food & Beverage	8	16	0
Service Commercial	5	43	4
TOTAL	20	88	4
% of Total	**19%**	**79%**	

Looking at Sapperton's role within the City overall, we see that it contains half of the City's automotive service businesses and 25% of its health services businesses.

Table 3-19: Sapperton Retail-Commercial Units and Floor Area as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	10.0%	2.6%
Comparison Retail	12.7%	5.0%
Convenience Retail	11.7%	12.9%
Restaurant Food & Beverage	11.3%	10.3%
Service Commercial	12.3%	14.8%
Automotive Services	50.0%	59.4%
Commercial Services	4.5%	3.9%
Education + Training	14.0%	11.4%
Finance, Insurance, Real Estate (FIRE)	5.9%	4.0%
Health Services	25.2%	34.6%
Personal Services	7.4%	6.8%
Professional Services	0.0%	0.0%
Social Services	5.0%	2.5%
Vacant	8.1%	4.4%
Retail-Commercial Totals	**12%**	**10%**

3.3.6 CONNAUGHT HEIGHTS

Connaught Heights' retail offerings are relatively limited and are predominantly located along 20th Street between London Street and 8th Avenue. The area's retail offering is comprised of 20 businesses encompassing just under 30,000 square feet, with nearly 75% of the total floor area within the convenience retail and service commercial categories. Most of the service commercial businesses are either early childhood education or healthcare.

Figure 3-6: Connaught Heights Retail-Commercial Inventory
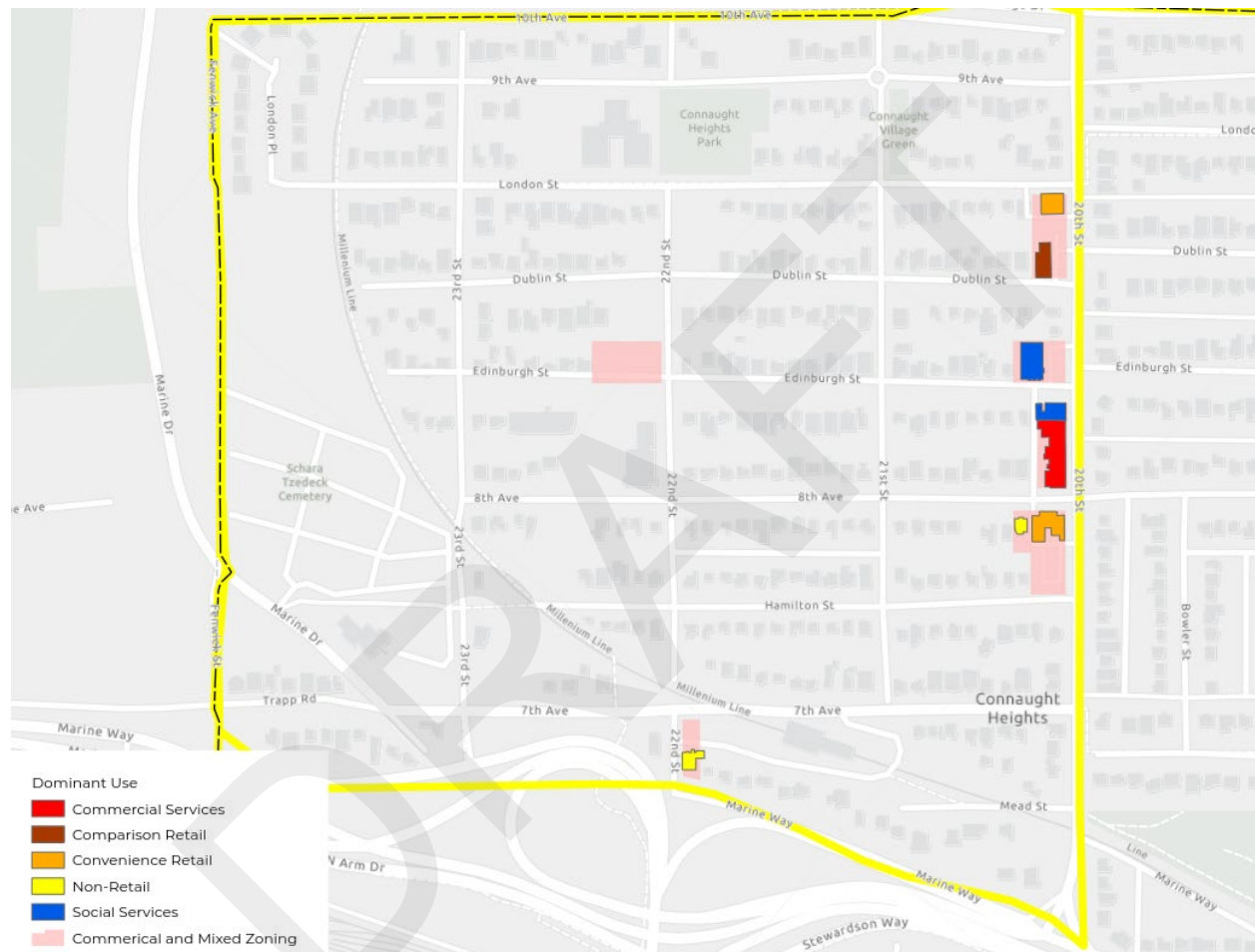
Table 3-20: Connaught Heights Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	0	0.0%	0	0.0%
Comparison Retail	1	5.0%	600	2.0%
Convenience Retail	3	15.0%	7,837	26.2%
Restaurant Food & Beverage	4	20.0%	3,800	12.7%
Service Commercial	9	45.0%	14,364	48.0%
Automotive Services	0	0.0%	0	0.0%
Commercial Services	1	5.0%	2,000	6.7%
Education + Training	0	0.0%	4,200	14.0%
Finance, Insurance, Real Estate (FIRE)	0	0.0%	0	0.0%
Health Services	3	15.0%	4,200	14.0%
Personal Services	2	10.0%	1,800	6.0%
Professional Services	0	0.0%	0	0.0%
Social Services	3	15.0%	6,364	21.3%
Vacant	3	15.0%	3,300	11.0%
Retail-Commercial Totals	**20**		**29,901**	
Retail-Commercial net of Arts/Culture	20		**29,901**	

Source: USL Field Survey 2021

Table 3-21: Connaught Heights Retail-Commercial Business Classifications by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	0	0	0
Comparison Retail	1	0	0
Convenience Retail	1	2	0
Restaurant Food & Beverage	0	4	0
Service Commercial	1	8	1
TOTAL	3	14	1
% of Total	**18%**	**78%**	

Table 3-22: Connaught Heights Retail-Commercial Units and Floor Areas as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	0.0%	0.0%
Comparison Retail	0.6%	0.1%
Convenience Retail	2.7%	1.7%
Restaurant Food & Beverage	1.9%	1.0%
Service Commercial	2.1%	1.3%
Automotive Services	0.0%	0.0%
Commercial Services	2.3%	2.0%
Education + Training	0.0%	1.5%
Finance, Insurance, Real Estate (FIRE)	0.0%	0.0%
Health Services	2.9%	1.5%
Personal Services	1.6%	1.3%
Professional Services	0.0%	0.0%
Social Services	15.0%	9.6%
Vacant	2.7%	1.3%
Retail-Commercial Totals	**2%**	**1%**

3.3.7 MCBRIDE BOULEVARD

The McBride Boulevard retail offerings are primarily located along 8th Avenue. There are also small pockets of retail and service commercial toward the southern end of Queen's Park, and within the Glenbrooke South neighbourhood.

Figure 3-7: McBride Boulevard Retail-Commercial Inventory
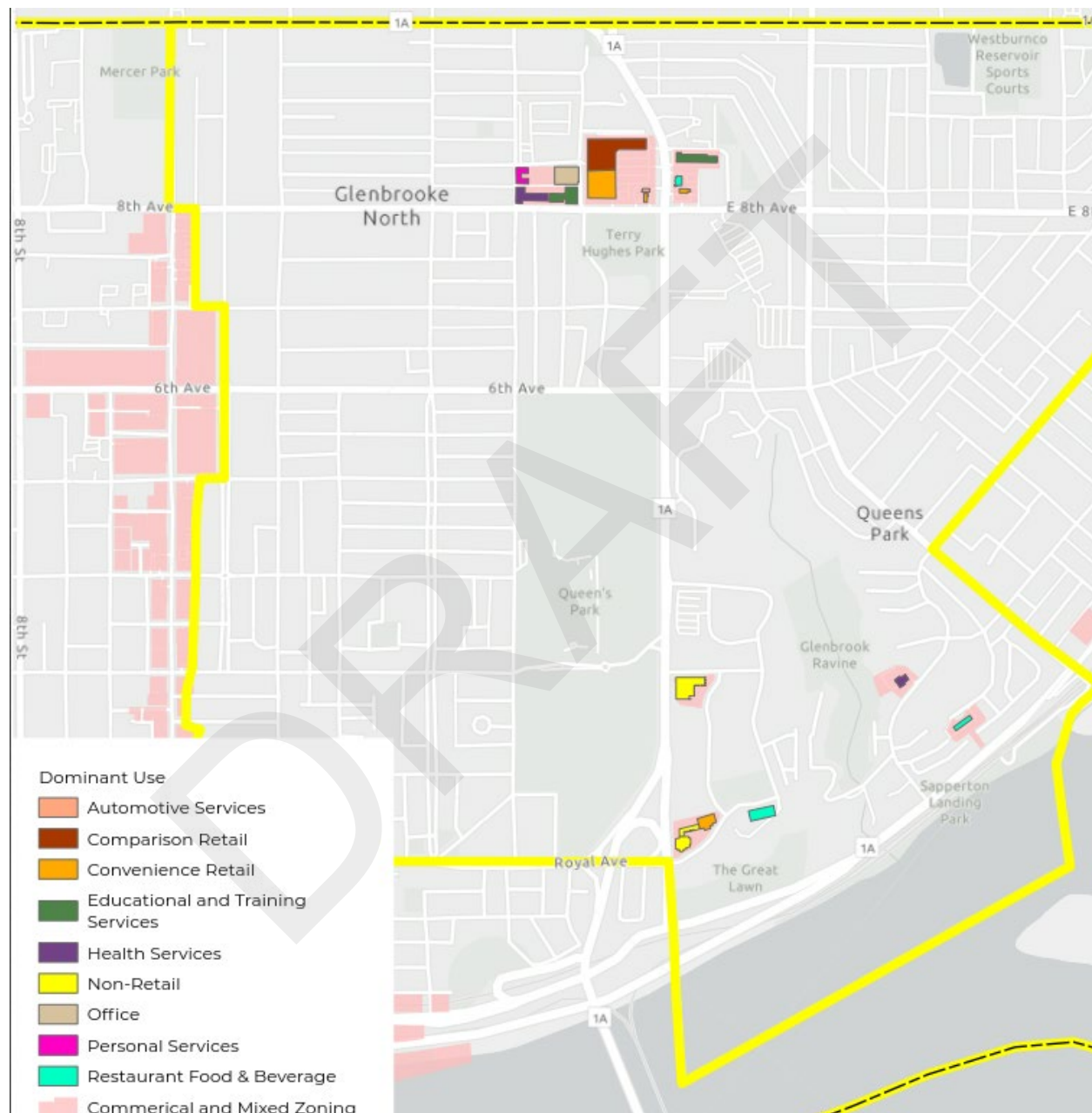
The retail mix is predominantly convenience retail and service commercial (60% of businesses and 70% of floor area combined), catering to the residents in the surrounding neighbourhoods. The area's main draw is the Royal Square mall, a grocery-anchored neighbourhood shopping centre with a 43,000 square foot Safeway, a liquor store, specialty food retail, and an array of personal services.

Table 3-23: McBride Boulevard Retail-Commercial Inventory

Broad Commercial Category	# Units	% of Units	Floor Area (Sq. Ft.)	% of Floor Area
Arts, Culture, Entertainment, & Recreation	1	1.4%	1,800	1.2%
Comparison Retail	8	11.8%	20,100	13.5%
Convenience Retail	11	16.2%	58,427	39.3%
Restaurant Food & Beverage	13	19.1%	20,359	13.7%
Service Commercial	30	44.1%	43,337	29.1%
Automotive Services	1	1.5%	444	0.3%
Commercial Services	5	7.4%	4,000	2.7%
Education + Training	5	7.4%	11,100	7.5%
Finance, Insurance, Real Estate (FIRE)	4	5.9%	3,700	2.5%
Health Services	4	5.9%	10,293	6.9%
Personal Services	8	11.8%	8,000	5.4%
Professional Services	2	2.9%	1,800	1.2%
Social Services	1	1.5%	4,000	2.7%
Vacant	6	8.8%	6,500	4.4%
Retail-Commercial Totals	**69**		**150,523**	
Retail-Commercial net of Arts/Culture	68		**148,723**	

Source: USL Field Survey 2021

Table 3-24: McBride Boulevard Retail-Commercial Business Classifications by Category

	Chain	Independent	Other
Arts, Culture, Entertainment, & Recreation	0	1	0
Comparison Retail	3	5	0
Convenience Retail	6	5	0
Restaurant Food & Beverage	6	7	0
Service Commercial	4	26	0
TOTAL	19	44	0
% of Total	**30%**	**70%**	

The modest McBride Boulevard retail offerings comprise 5% of City-wide floor area, and 7% of City-wide retail / service commercial units.

Table 3-25: McBride Boulevard Retail-Commercial Units and Floor Area as % of City-Wide, by Category

% of City-Wide Units	% of City-Wide Unit Count	% of City-Wide Floor Area
Arts, Culture, Entertainment, & Recreation	3.3%	0.8%
Comparison Retail	5.1%	2.5%
Convenience Retail	9.9%	12.5%
Restaurant Food & Beverage	6.1%	5.1%
Service Commercial	7.1%	4.1%
Automotive Services	12.5%	3.1%
Commercial Services	11.4%	4.1%
Education + Training	10.0%	3.9%
Finance, Insurance, Real Estate (FIRE)	7.8%	2.5%
Health Services	3.9%	3.7%
Personal Services	6.6%	5.9%
Professional Services	7.7%	4.3%
Social Services	5.0%	6.0%
Vacant	5.4%	2.6%
Retail-Commercial Totals	**7%**	**5%**

3.4 INVENTORY SYNOPSIS

The New Westminster retail landscape shows many signs of health and vitality, as well as instances of areas that are struggling, or areas in transition.

- The retail 'skeleton' of New Westminster is the Uptown spine and the Downtown base, the two areas together comprising 55% of the City's retail floor area, 59% of retail units, and 53% of retail unit vacancies.

- Within the arts and cultural sectors, the Downtown is the primary draw.

- The strength of Uptown from a commercial mix standpoint extends its drawing power well beyond its immediate neighbourhood. This, in turn, limits the need (and opportunity) for retail in other areas, most notably 12th Street.

- 12th Street has a healthy core but is increasingly under redevelopment pressure. And while this redevelopment will bring more resident customers into the trade area, the Uptown proximity (as well as proximity to southeast Burnaby) will continue to exert a large influence, which will limit the extent of opportunity in certain categories.

- Sapperton has a compelling tenant mix, and serves its local trade areas (plus the growing hospital precinct) well. There

- Other retail areas serve niche roles within their local neighbourhoods. Retail areas along McBride have significant redevelopment / intensification potential.

In Section 4 below we turn to an overview of the engagement portions of this exercise, before turning to projections of future demand and reconciliation of demand with the supply outlined above.

4.0 BUSINESS OUTREACH AND SURVEYS

Primary research was conducted with business owners, operators, and retail customers in New Westminster through a combination of door-to-door business engagement, online surveys, and one-on-one interviews. At time of writing there remain some outstanding inquiries to property owners. Additional interviews will be conducted over the coming month, with results of those summarized in the final report submission.

The purpose of engagement with business owners / operators and landlords was to understand their perceptions of challenges and key issues they face. Engagement with local shoppers (via online survey) was done with the intent of understanding patterns and preferences, highlighting both potential 'gaps' in the retail landscape, and informing assumptions for projections of future opportunity.

4.1 DOOR-TO-DOOR BUSINESS ENGAGEMENT

4.1.1 OVERVIEW

Many retailers and small business owners do not have the time, resources, or awareness to attend in-person engagement events. Further, those who do attend are often people who have the confidence and experience to do so. This means that traditional, centralized engagement events risk not reaching a broad range of retailers and business owners, particularly those who face barriers to attending.

To mitigate this risk, ensure we reach a wider audience of stakeholders, and create a more equitable engagement process, we conducted door-to-door engagement in retail areas and along the Great Streets of New Westminster, including:

- 6th Street and 6th Avenue, in Uptown
- 12th Street, in the West End neighbourhood
- Ewen Avenue, in Queensborough
- East Columbia Street, in Sapperton

Door-to-door engagement in the Downtown was paused due to current construction-related challenges.

The purpose of the door-to-door engagement is to learn about the diverse needs, concerns, goals and aspirations of business owners and operators – beyond those most vocal. Our approach is to meet people where they were, instead of expecting them to come to us. This allowed us to connect with retailers in environments where they feel most at-ease, thereby reducing some of the barriers to engagement. Through these in-person visits, we sought to include newcomer businesses, entrepreneurs from diverse cultural and linguistic backgrounds, long-established community operations, and more. Our goal was to solicit input on the broader retail strategy, and to identify opportunities to make New Westminster's retail areas and Great Streets more vibrant, attractive and inclusive.

4.1.2 WHAT WE DID

We began by conducting desktop research and compiling a list of all the retailers located within each of the target areas. Through cross-referencing with Google Maps, as well as insights from those with

lived experience in the communities, we also created a shortlist of key businesses to prioritize reaching in each neighbourhood.

Meanwhile, we put together a set of interview questions, closely following the online survey created for the project's "BeHeard" page. These questions were designed to gain an understanding of the unique insights and perceptions that business owners and operators have regarding: (1) their location and surroundings, (2) the sense of welcomeness and belonging they feel; (3) their day-to-day needs as well as those of their customers; (4) the spending demographics of those who visit their business; (5) and the levels of support they have received or would like to receive from the City.

We conducted on-site engagement during August 2021. Happy City members and City staff were paired and designated to specific blocks within each neighbourhood. Door-to-door visits were arranged such that we visited 1-2 neighbourhoods per day of engagement.

Teams approached each business by beginning with a brief introduction of themselves and the projects, and asking to speak with an owner or manager. If an owner or manager was available an willing to participate, we then went deeper into the context of the project and went through the interview questions. One team member was responsible for conducting the interview, while the other took notes (after obtaining permission from the interviewee). Following each interview, or if the owner or manager was unavailable, we left postcards directing them to the *BeHeard* page and engagement survey, for next steps and any further questions.

Our notes, findings and list of locations where postcards were dropped off were compiled following each day of door-to-door engagement. A summary of key themes and findings per neighbourhood is below.

4.1.3 FEEDBACK BY AREA

Uptown (6th St & 6th Ave)

Who we spoke with:
A total of 57 postcards were dropped off in the Uptown Area, and 7 in-person engagements were conducted.

We targeted 6th Avenue between 8th Street and 5th Street, and focused our efforts on 6th Street between 4th Avenue and 8th Avenue. We spoke with a broad range of people, including business owners, managers and one property owner. Several of the businesses we reached were fairly new to the neighbourhood (opened within the past two years), while others were longstanding establishments, ranging from 10 to 30+ years in the neighbourhood. Aside from wig and prosthetics shop (Viton Hari Studios) who own their space, all other businesses rent their spaces and are in 3, 5 or 10-year lease agreements. Three of the businesses we spoke with were family-run.

Neighbourhood & Challenges
When asked about the changes they have observed in the Uptown area since they first opened their businesses, most comments were about the shifts that resulted from the pandemic. Some said they were able to maintain their customer base, while others noted decreases in income.[7] Most challenges

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[7] Those who maintained their customer base operated in the following categories: F.I.R.E services, personal services, general merchandise. Those which saw decreased income operated largely in personal services.

URBAN SYSTEMS

noted during these conversations were pandemic-induced, rather than having to do with the neighbourhood itself. A recently-opened specialty food and beverage operator (open for 9 months at time of conversation) noted difficulties in attracting customers – more than expected. They noted that online approaches (promotions through apps, Facebook etc.) were successful in attracting some patrons, as well as for getting feedback from customers. In general, the cost of rent and maintenance of businesses was a common point of concern, with most noting that this challenge had been exacerbated by the pandemic.

Clientele

Most interviewees said their businesses serve a diversity of patrons. However, we did speak with some specialty businesses.

- A convenience store businesses specializing in Ethiopian items tends to attract customers from around the City, as well as from Burnaby. Most drive to the store and complain about a lack of parking. The lack of a loading bay also causes challenges for deliveries.

- A hair salon, which primarily serves people undergoing cancer treatment, is also a regional attractor. They say that, between on-street parking and nearby parking lots, there is ample customer parking.

Interactions with City of New Westminster

In terms of the level of support for businesses in this area, most interviewees did not offer comment. Those who did said they wished they had known more about the challenges of obtaining certain licenses (e.g., lottery tickets) or that they had more help with attracting clientele. A local barber shop noted that they could have done more market research on the area prior to having purchased the salon. They also emphasized the importance of having a sandwich board outside that can direct people in. This speaks to the importance of balancing accessibility considerations on the sidewalk with opportunities for local businesses to use the space for promotion or other sales-related needs.

A few businesses commented on the cleanliness and overall maintenance of the sidewalks and garage bins. Aside form general displeasure with "high taxes", most interviewees seemed satisfied with the City's support overall.

Outlook and Future

Looking ahead, most people said they are hopeful, and are trying to grow their businesses. Two interviewees noted that they are looking to either move or open a second location. One mentioned they are trying to sell their business entirely.

West End (12th Street)

Who we spoke with

Along 12th Street, our team dropped off 72 postcards and conducted 5 in-person interviews with 5 businesses. Three of the people interviewed were new to the area within the past year, and one of these businesses (a Cannabis retailer) had just opened within the last month. Only one business that we spoke with owned their space, having purchased it five years prior from the previous owned who had run the business out of the same location for 45 years. One business noted that they are operating on a two-year lease and will be moving at the end as the property owner is intending to demolish and rebuild. Another two businesses expressed that they hope to stay and grow in their current locations for the foreseeable future.

Neighbourhood & Challenges

In terms of challenges and opportunities for improvement, one business owner noted a need for a crosswalk by the bus stop at 12th and Nanaimo to improve pedestrian safety. Another pointed to a need for the City to develop or build the former gas station and carwash, as the space has been vacant for 5 years and is "an eyesore" to the community.

In terms of clientele, although we spoke with a diversity of retailers (ranging from a photo lab to a cannabis shop), only one specialty grocer noted that they target a specific demographic / ethnic group, their emphasis being on Filipino / Asian products.

Queensborough (Ewen Ave)

Who we spoke with

In the Queensborough neighbourhood, we dropped off 19 postcards and were able to connect with 7 businesses in person. We went door-to-door from Duncan Street to Gifford Street along Ewen Avenue. The interviewees we spoke with were a mix of owners, managers, employees or relative of business owners. Three of the businesses had opened within the past year, while the others had been in Queensborough for 6, 11, 25 and 45 years, respectively. Two businesses owned their space, while other are in lease agreements.[8]

Neighbourhood & Challenges

Queensborough Landing as a location for retail brought up a diversity of perspectives. Importantly, there is significant development taking place in Queensborough, which is increasing the number of local shoppers. Coupled with this development are general infrastructure upgrades, including street and sidewalk improvements, which were perceived favourably by new owners. This, together with a high share of new businesses opening in the area, indicates that Queensborough is an area with significant potential for retail growth long-term. Overall, the outlook amongst interviewees was optimistic, with broad hopes that business, as well as population of Queensborough, will continue to increase in the post-pandemic period.

Looking at challenges, several businesses noted the disruption from construction, recognizing that they ultimately benefited from the changes, but also wishing less of an impact in the moment. Further, the manager of a fitness studio expressed a desire for more connections into Queensborough, and most noted a decline in business as a result of the pandemic. They also noted that Queensborough Landing was not a particularly strong retail area, and that it was losing out to newer malls such as McArthur Glen and Tsawwassen Mills. Finally, it is important to highlight that development in the area may result in additional pressure on long-term businesses, as taxes increase to reflect highest and best use redevelopment potential. If maintaining existing businesses along Ewen Avenue is a priority, this will need to be addressed.

Interactions with City of New Westminster

There were few comments from interviewees regarding their interactions or interface with City staff. A liquor store manager noted that the City has been good with road work notices, but that construction has caused difficulty for deliveries. They did note, however, that accessibility to the business has improved overall due to recent road work, making it nicer to both drive and walk.

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[8] Of note is Yin Leong Market, which has operated an urban farm in Queensborough since the late 1970s.

Sapperton

Who we spoke with

Door-to-door engagement in Sapperton included businesses along E Columbia Street, from Brunette Avenue to Braid Street. We dropped 20 postcards and spoke with 4 business owners. Two of the businesses have been operating at this Sapperton location for the past 3 years, while the other two were long-term establishments of 17 and 18 years. Only one business owned their property, and the owner of one business noted that after 18 years at this location, their lease was expiring and they would be looking to relocate due to increased rental rates.

Neighbourhood & Challenges

When asked about the neighbourhood and location, most interviewees noted a significant increase in population and spending rates due to the new residential and commercial developments in the area. This was seen as a positive outcome, or a fair 'exchange' for increasing challenges of higher property taxes and rents. All four businesses described serving a diversity of customers, while one grocery retail business specified that they often see couples and single people in particular (as opposed to families) due to the nature of their smaller scale grocery offering.

It was noted that no one had any specific thoughts on what makes Sapperton unique, with one business explicitly declining to comment. Overall, there was agreement that the neighbourhood has been changing quickly, with varying degrees of positivity on said changes.

Interactions with City of New Westminster

In terms of support from the City, two businesses specifically noted the challenges of parking permits and garbage pickup, as well as the price for this service. Some interviewees expressed a desire to have had a better understanding of the community and market landscape / outlook prior to starting their business at this location

4.1.4 KEY OVERALL THEMES

- Generally, businesses were appreciative of the opportunity to engage face-to-face, and were appreciative that the City was actively engaging in this work.

- There was no significant frustration or complaints towards the City (taxes and costs aside).

- There is a lack of business association awareness / engagement by some businesses

- Many businesses noted a need to better understand the market / neighbourhood landscape, with newer businesses noting they would have benefited from greater insight prior to opening.

- Promotion / marketing would help newer / smaller businesses find more customers

- People are tired, but optimistic

- Construction disruptions are a pain point

- Ongoing development / redevelopment activity risks impacting, and possibly forcing out, longstanding businesses, particularly in Queensborough, 12th Street and Sapperton.

4.2 SURVEYS

Three online surveys were run, targeting commercial property owners, local shoppers, and local businesses, with the survey links being active from June 18 to November 4th, 2021. The surveys were

promoted in part through the face-to-face engagement and postcard drop-offs discussed above. Response rates varied survey-to-survey:

- Local business survey: n= 29
- Local shoppers survey: n= 144
- Commercial property owners survey: n = 0

As the survey of property owners received zero responses, we sought commentary from select property owners through direct outreach. Feedback from those conversations is documented separately. Subsections below present the results from the business and local shoppers' surveys.

4.2.1 BUSINESS SURVEY

The survey of business owners and operators garnered input from 29 respondents. Most respondents (90%) identified themselves as business owners, running independent businesses that are registered as corporations or sole proprietorships (86%). 90% of respondents indicated that their business location in New Westminster was their only location within Metro Vancouver. Respondents covered a range of business categories:

- Retail trade (8)
- Personal services (5)
- Food & beverage (4)
- Arts, entertainment, and recreation (2)
- Education services (2)
- Professional services (2)
- Other (6)

All but 4 of the 29 respondents indicated that they rent their business premises.

Business Longevity

Survey responses were generally weighted towards those with a longer tenure of business activity in New Westminster. 52% of respondents have been in business at least 7 years, with 45% being in business at least 10 years. Only 1 respondent had bee in business for less than 1 year.

Figure 4-1: "How many years have you been in business?"
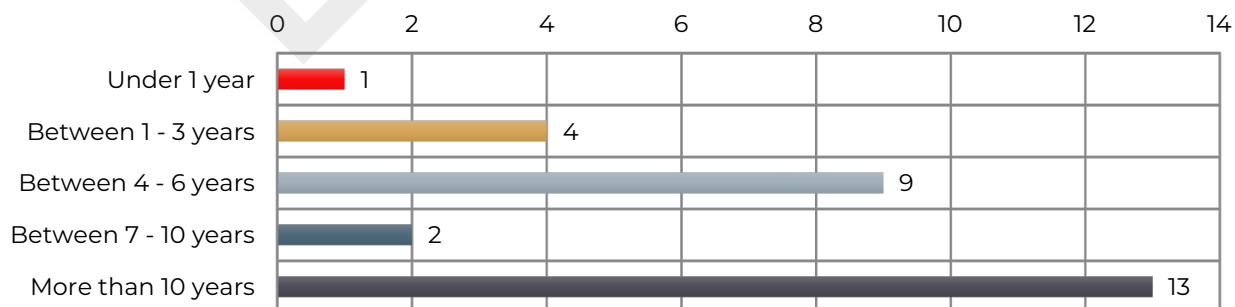
Lease Terms

Amongst the 25 respondents who indicate they lease their premises, 54% are on a 'triple net' lease (i.e., business pays a base rent, plus property taxes, insurance and utilities, and other maintenance costs). This is the most typical commercial real estate lease structure. Two businesses have 'gross leases', which are generally uncommon in commercial real estate.

Figure 4-2: "What is the structure of your tenancy"?
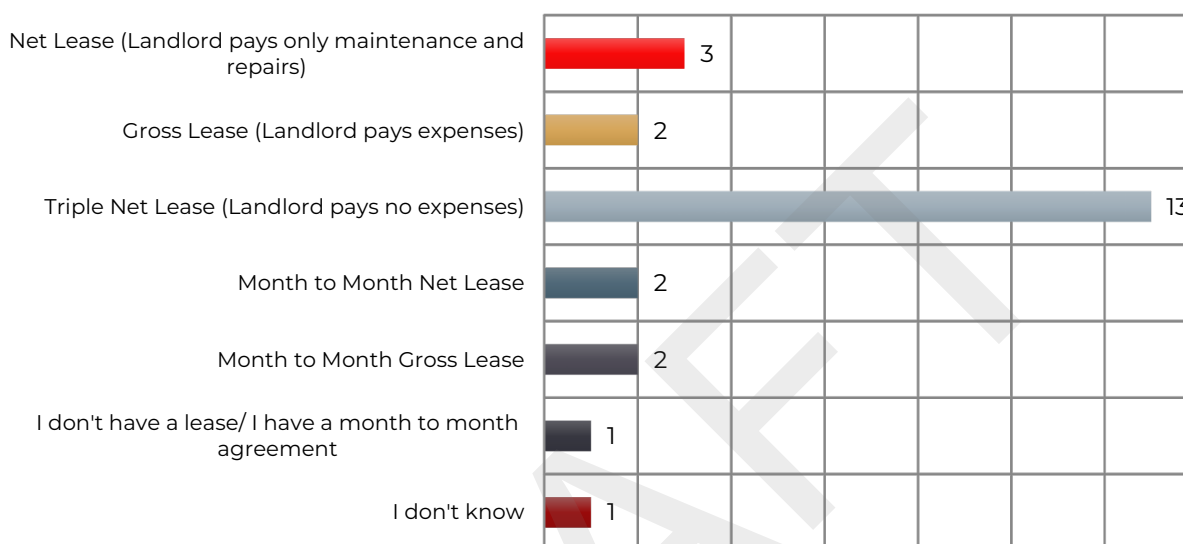
Business Sales Trends

In the two-year period leading up to the Covid-19 pandemic in March 2020, a substantial majority of respondents (nearly 70%) indicated that their business sales volumes had been on an upward trajectory. This figure increases to 74% when removing those who were not in business 2 years prior to early 2020.

Figure 4-3: "How would you describe your sales trends in the 2 years up to March 2020?"
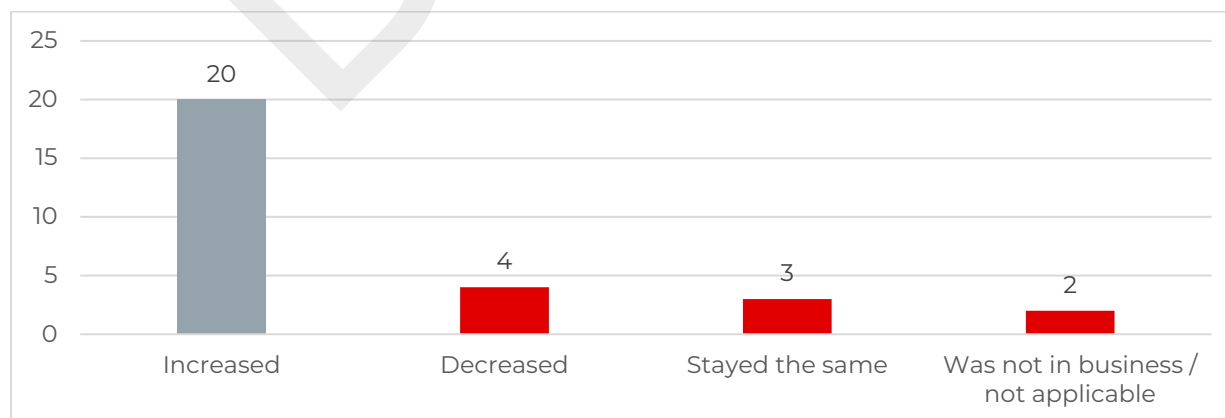
When asked about the factors that most contributed to their sales trajectory trend, the top two responses were "more new customers", and "more repeat customers." This speaks to the positive

impact on local businesses from growth in surrounding neighbourhoods, along with these businesses' quality of goods / service such that they are building a reliable client base. Other notable responses include:

- Addition of new services

- Investments in advertising / marketing efforts

- Business upgrades.

Figure 4-4: "What do you think were the main factors contributing to an increase in sales before March 2020? (select all that apply)"
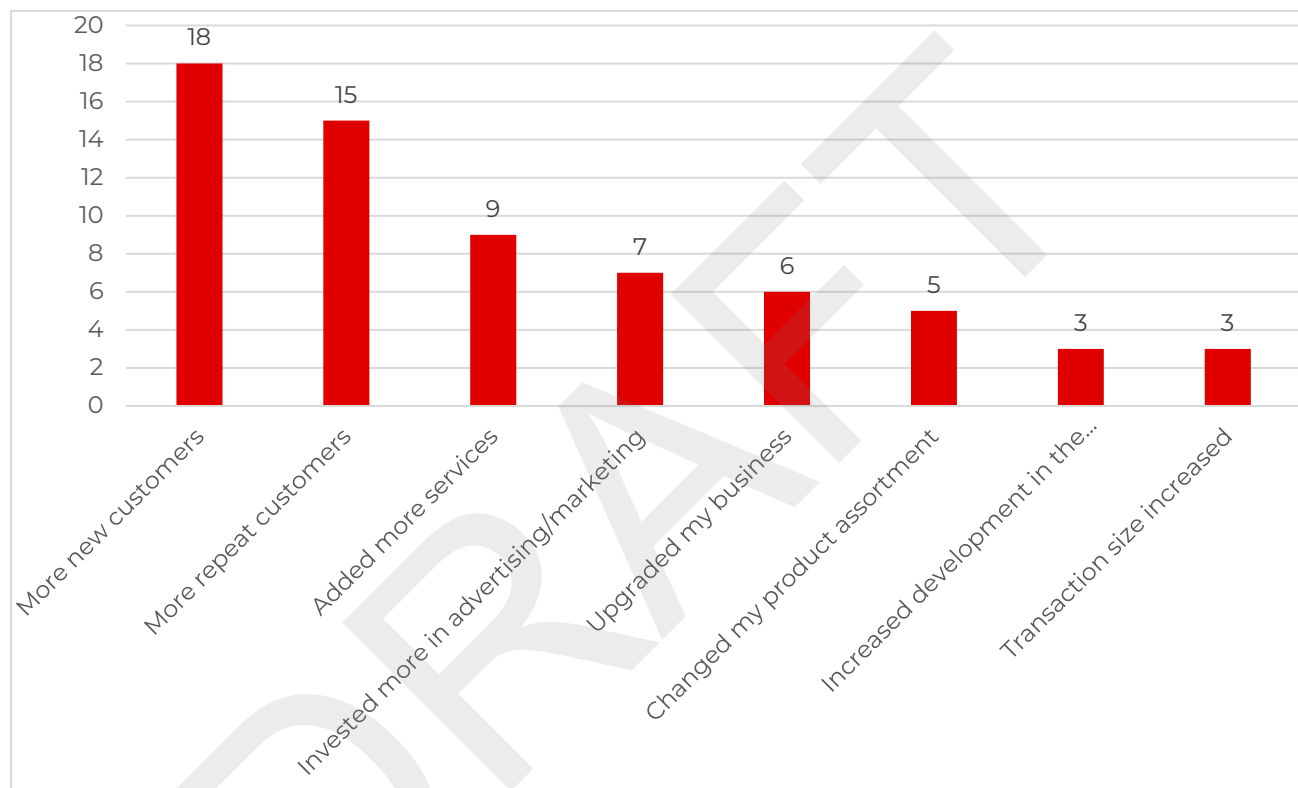
Since March 2020, the sales trajectories of businesses have been varied:

- 31% of respondents indicated that their sales volumes were still on an upward trajectory

- 10% indicated that their sales volumes had remained about the same

- 59% indicated that their sales volumes had decreased.

When asked what they thought were the main factors contribution to the decrease in sales since March 2020, the most common response was "fewer customers". Other key contributors were:

- Insufficient staff
- Supply chain challenges / price increases

Figure 4-5: "What do you think were the main factors contribution to the decrease in sales since March 2020? (Select all that apply)
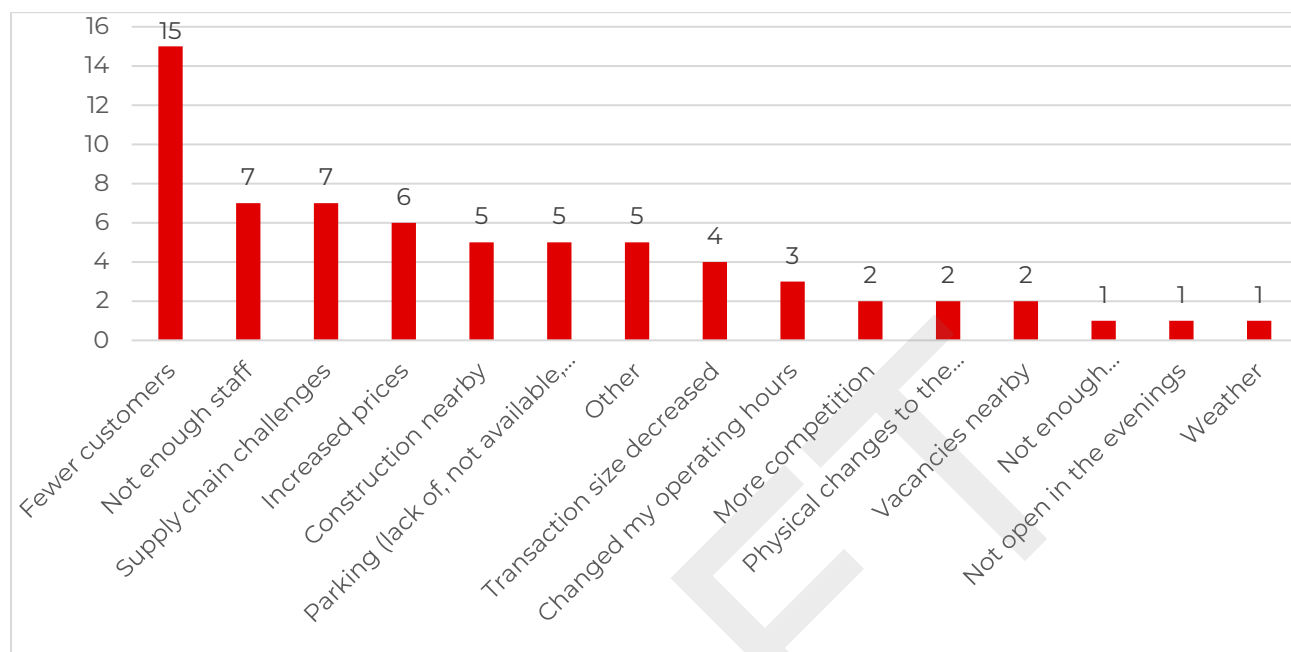
Challenges to Business Viability

Retailers were asked to identify key challenges for their business model from a list of 23 options. If a key challenge did not appear on this list, they were asked to check "other" and provide details.

The most commonly identified business challenges, identified by 55% of respondents, were "cost of doing business," and "staffing costs / issues." This was followed "Parking" and "rents" (each identified by 48% of respondents). Ranking third was "the economy" more broadly (identified by 45% of respondents).

Amongst the list of items that are within the purview of the City, the following challenges were identified:

- Cleanliness and maintenance of street (31%)
- Curbside management (28%)
- Property taxes (24%)
- Waste management (17%)

Figure 4-6: "Which of the Following Factors are proving challenging for your business? Check all that apply"
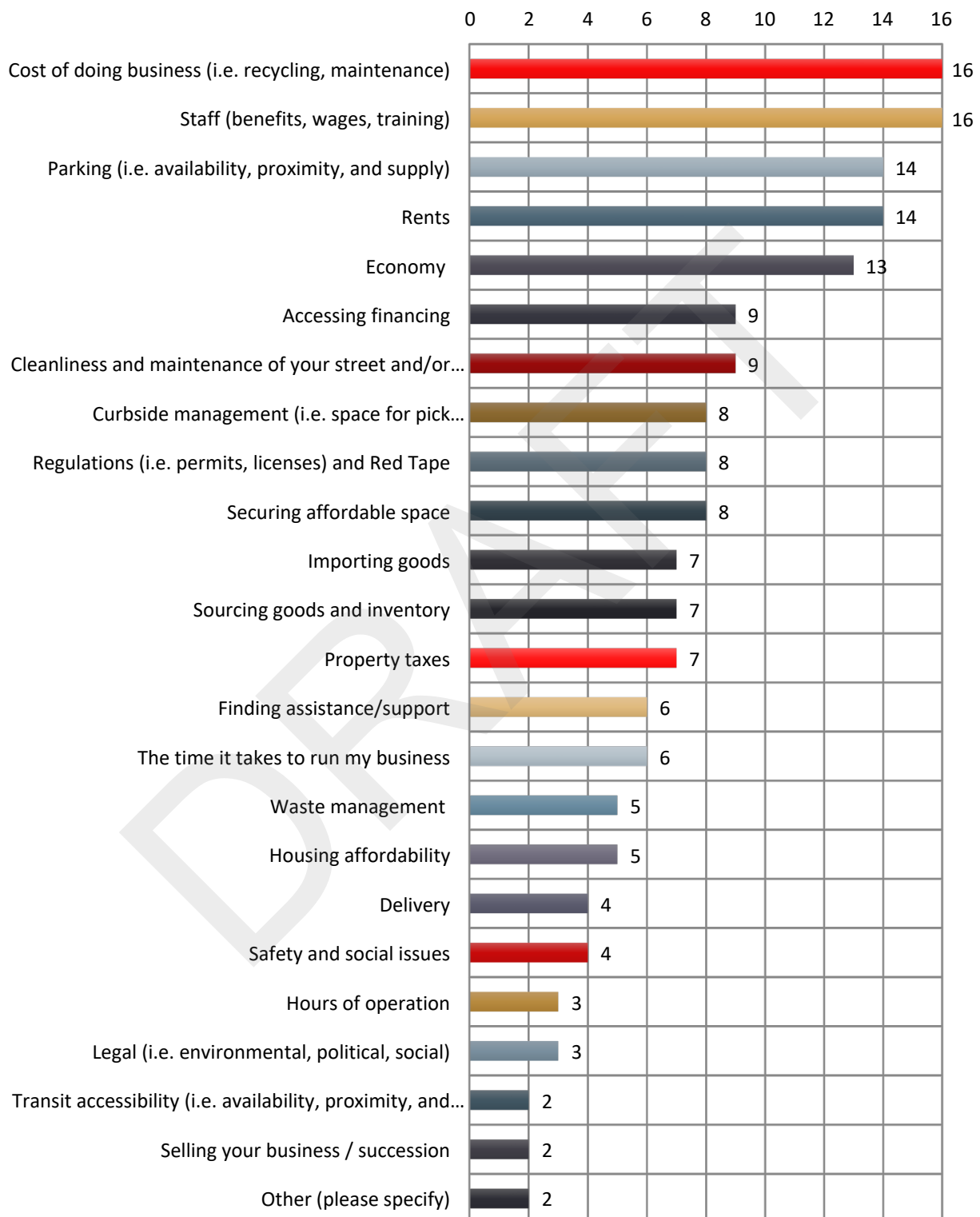
Business Outlook

Respondents were asked to identify how they envision their business developing over the next 2 to 5 years. Amongst the 29 respondents, 13 (45%) indicated that would like to expand their business at its current location. Another 10 envisioned a steady state, while 4 envisioned keeping their location and expanding their business to also include another location. Only 3 indicated intent to close their business.

Figure 4-7: "In the next 2-5 years, how do you see your business developing? (check all that apply)"
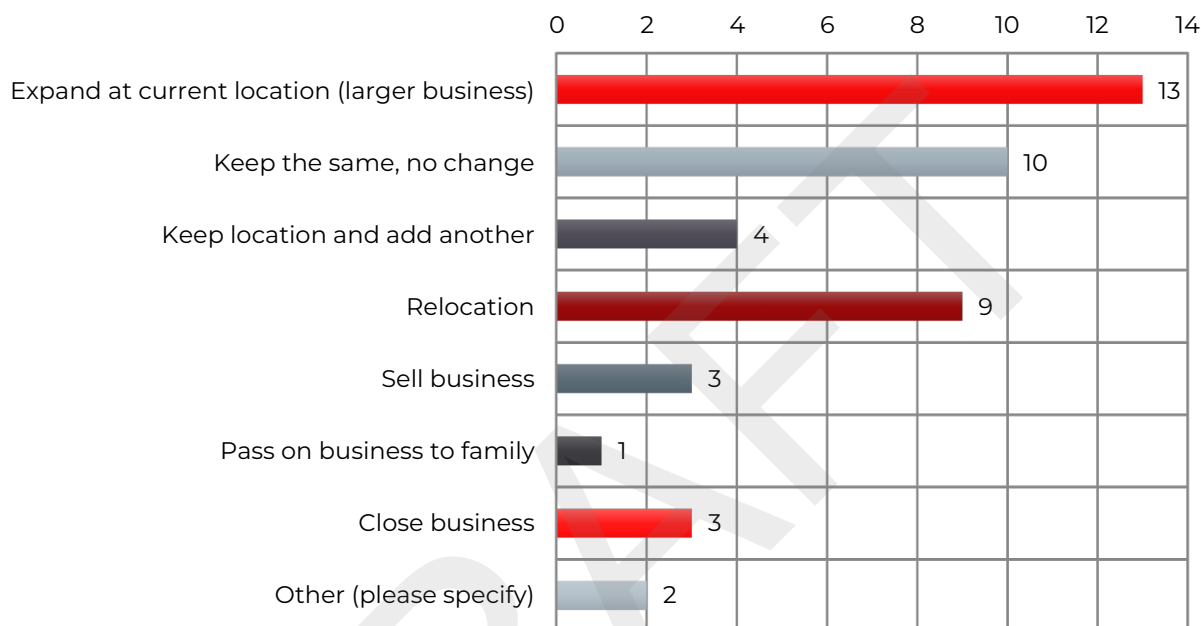
Business Motivation

Finally, respondents were asked about their personal metrics for "success." Sixteen options were provided, and altogether the 29 respondents provided 250 responses, for an average of 8 responses (of 16 possible) each.

The top 5 business motivators were:

- Doing what I love (indicated by 83% of respondents)
- Contributing to my community (79%)
- Satisfying customers / repeat business (76%)
- Enriching others' lives (69%)
- Providing a good living for myself and my family (66%)

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Figure 4-8: "How do you measure success? Check all that apply"

	Value
Doing what I love	24
Contributing to my community	23
Satisfying customers / repeat business	22
Enriching others' lives	20
Providing a good living for myself and my family	19
Making a profit	18
Paying my bills on time	18
Being my own boss	17
Rewarding career	17
Being a successful entrepreneur	16
Growing and developing my business in new and different ways	15
Mentoring	11
Growing a strong team	10
Creating a business for my family	8
Providing employment and career opportunities for underrepresented or less-advantaged groups	8
Providing skills training and development opportunities for underrepresented or less-…	4

4.2.2 LOCAL SHOPPERS SURVEY

An online shoppers survey of New Westminster residents achieved 144 responses. Of those, 58% identified themselves as their household's "primary shopper".

General Shopping Patterns

When it comes to purchasing day-to-day goods and services, 25% of survey respondents indicated that they make these purchases primarily in their local neighbourhood, while 47% said they make these types of purchases at a variety of locations throughout New Westminster. Approximately 17% of respondents said they do not shop in their own neighbourhood.

Figure 4-9: "Where do you make your day-to-day purchases for goods and services?"
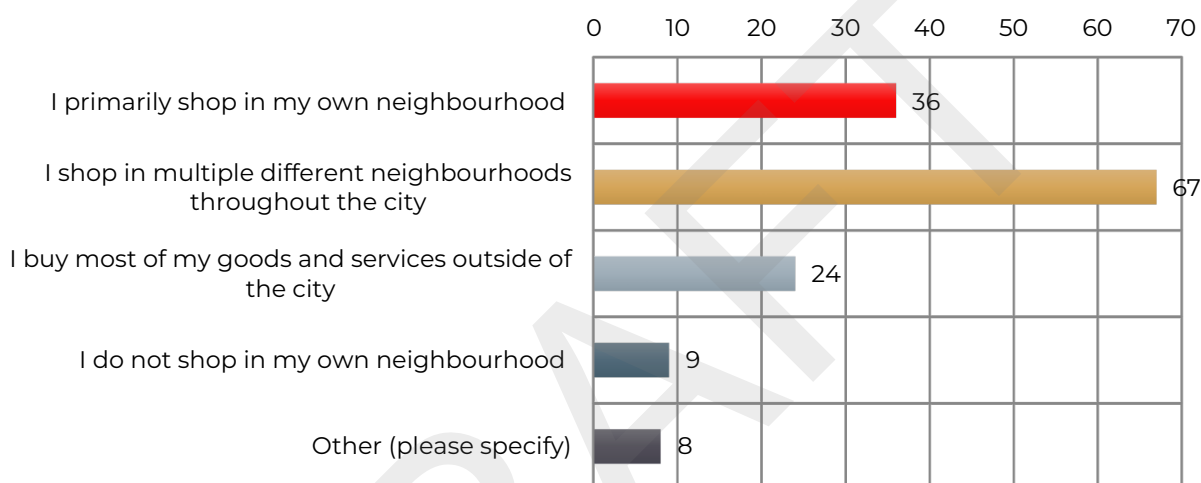
Shoppers were also asked to reflect on their typical goods and services purchasing patterns more broadly, and how those translated to propensity to shop locally, elsewhere in the City, outside the City, or online.

- Of the 144 respondents, nearly 50% said they never shop online. Only 11% indicated that they shop for goods online at least every few weeks. This level of online shopping propensity is, while perhaps lower than some may expect, broadly consistent with national level statistics on proportions of retail dollars spent online.

- 70% of respondents said they shop in their own local shopping areas at least once per week, with 28% saying they shop in their neighbourhoods daily.

- Just over 50% of respondents said they shop outside of New Westminster at least once a week. This level of outflow is unsurprising given the drawing power of retail offerings in Burnaby,

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Surrey and elsewhere, combined with the substantial commuter outflows to jobs across the region.[9]

- 80% of respondents said they shop locally or at other neighbourhoods in New Westminster at least every few weeks.

Figure 4-10: "How often do you shop or access services in these areas?"
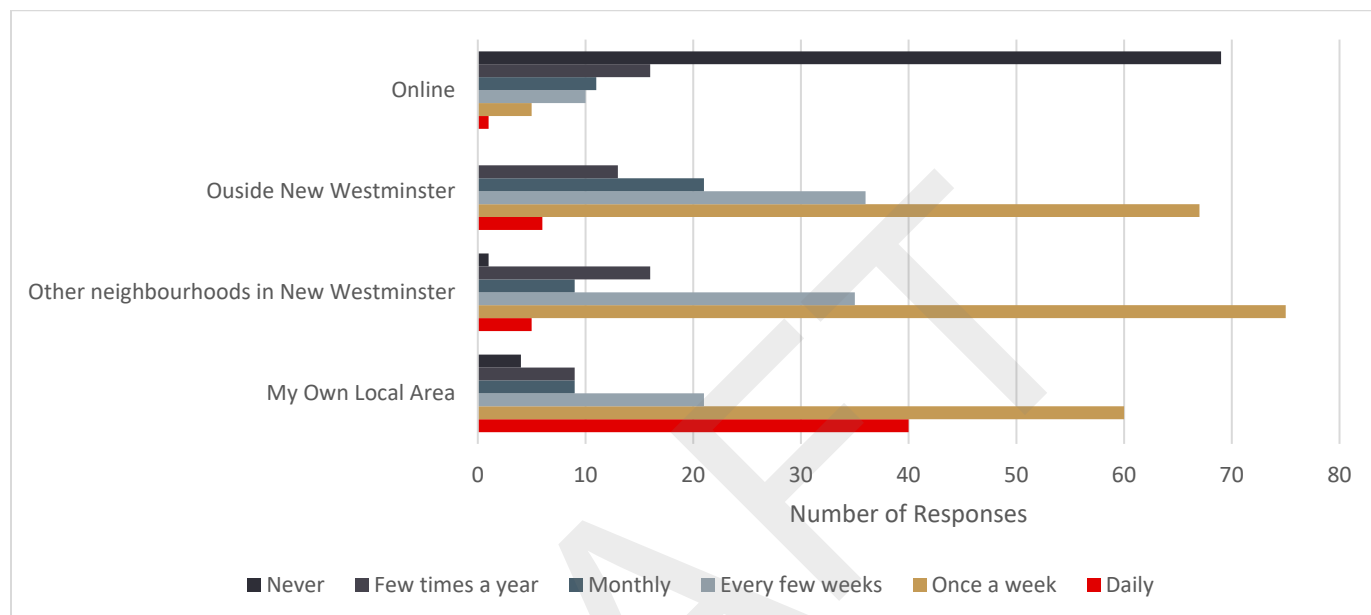
Shopping Patterns by Category

Residents were asked to identify their current geographic shopping patterns (not preferences) by industry category, to build an understanding of the extent to which goods / services needs are being met locally.

- The propensity of New Westminster residents to shop locally (within the City) for day-to-day convenience goods (e.g., grocery, health, personal care) is, in nearly all cases, higher than propensity to purchase comparison-type goods locally.
    - Nearly 60% of respondents indicated they buy beer, wine, and liquor locally
    - 46% of respondents indicated that they typically buy their groceries locally
    - Nearly 40% of respondents said they typically purchase health / personal care goods locally

- With the exception of "general merchandise" store purchase (30%), propensity for respondents to purchase comparison goods locally was under 20%, and in most cases under 10%. This is likely, in part, a function of a lack of local retail supply in the noted categories.

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[9]Per the 2016 Census: 82% of the New Westminster labour force with a "usual place of work" worked outside of the City. The most common destinations were Surrey (18% of outflow), Burnaby (12%), Vancouver (10%) and Coquitlam (8%).

- Just over 40% of respondents indicated that they make the majority of their restaurant food & beverage purchases within New Westminster.

- Categories in which the vast majority of purchases are made outside the City include:
  - Furniture and home furnishings (85%)
  - Electronics and appliances (80%)
  - Sporting goods / hobbies / books / music (77%)
  - Clothing, shoes and accessories (76%)
  - Building materials / garden supplies (64%)

Figure 4-11: "Where do you typically purchase the following goods and services?"
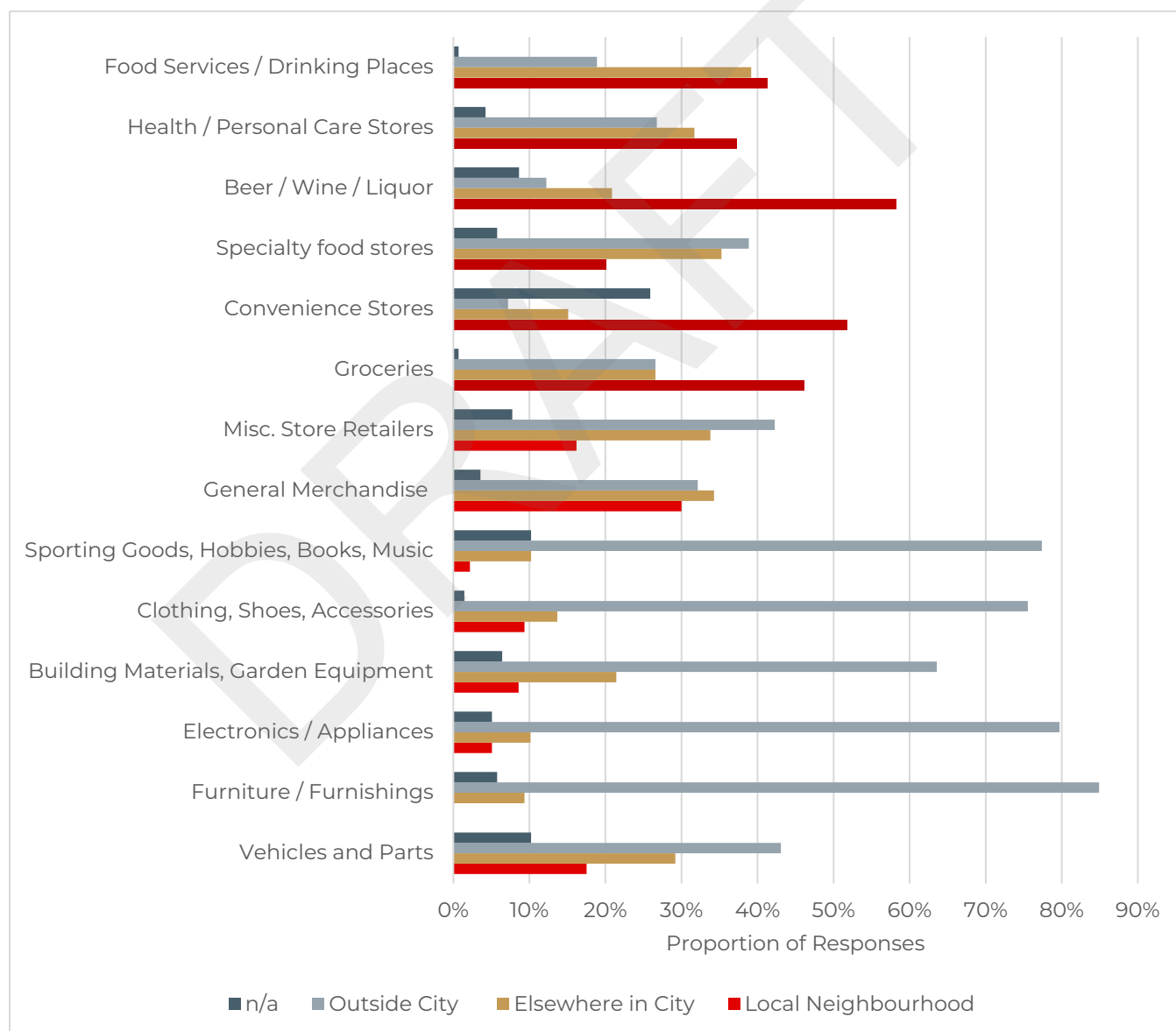
Perceptions of Goods and Services Variety

Following on the shopping patterns question above, respondents were asked to describe their views on the availability of goods and services within the City. This is a question about preference, and whether the existing tenant mix does or does not meet the needs of local shoppers.

"There is Enough to Meet My Needs"

- In the 'beer / wine / liquor' category, more than 70% of respondents indicated that there is sufficient variety to meet their needs.

- More than 60% of respondents said there are enough convenience stores

- Around 50% of respondents said there is enough availability of vehicle sales and parts, general merchandisers, and health / personal care stores.

- Categories in which less than 30% of respondents indicated sufficiency included:

  o Food services / drinking places (27%)

  o Specialty food stores (22%)

  o Sporting goods / hobbies / toys / music (6%)

  o Clothing, shoes, accessories (6%)

  o Electronics / Appliances (8%)

"I Would Like to See More Of This In New Westminster"

As we may expect, in most categories that were flagged by respondents as not meeting their needs, there was a desire to see more stores offering those types of goods in New Westminster.

- 65% or more of respondents said they would like to see more of the following:

  o Food services & drinking places (70%)

  o Specialty food stores (74%)

  o Clothing, shoes and accessories stores (73%)

  o Sporting goods, hobbies, books, music (67%)

- The categories of Clothing / Shoes / Accessories, and Sporting Goods / Hobbies / Books / Music, showed the largest gap between desire for more in New West (high) and perception of sufficiency (low).

- 50% of respondents would like to see more variety in grocery stores / supermarkets

- Between 30% and 49% of respondents would like to see more variety in the following categories:

  o Health / Personal Care (36%)

  o Convenience stores (32%)

  o Building materials / garden stores (48%)

  o Electronics / Appliances (38%)

:

Figure 4-12: "What best describes your view on availability of goods / services in New Westminster?"

Legend:
- ■ I prefer to shop online in this category
- ■ I am happy to travel outside New Westminster for these types of shops
- ■ I would like to see more of this in New Westminster
- ■ There is enough to meet my needs in New Westminster
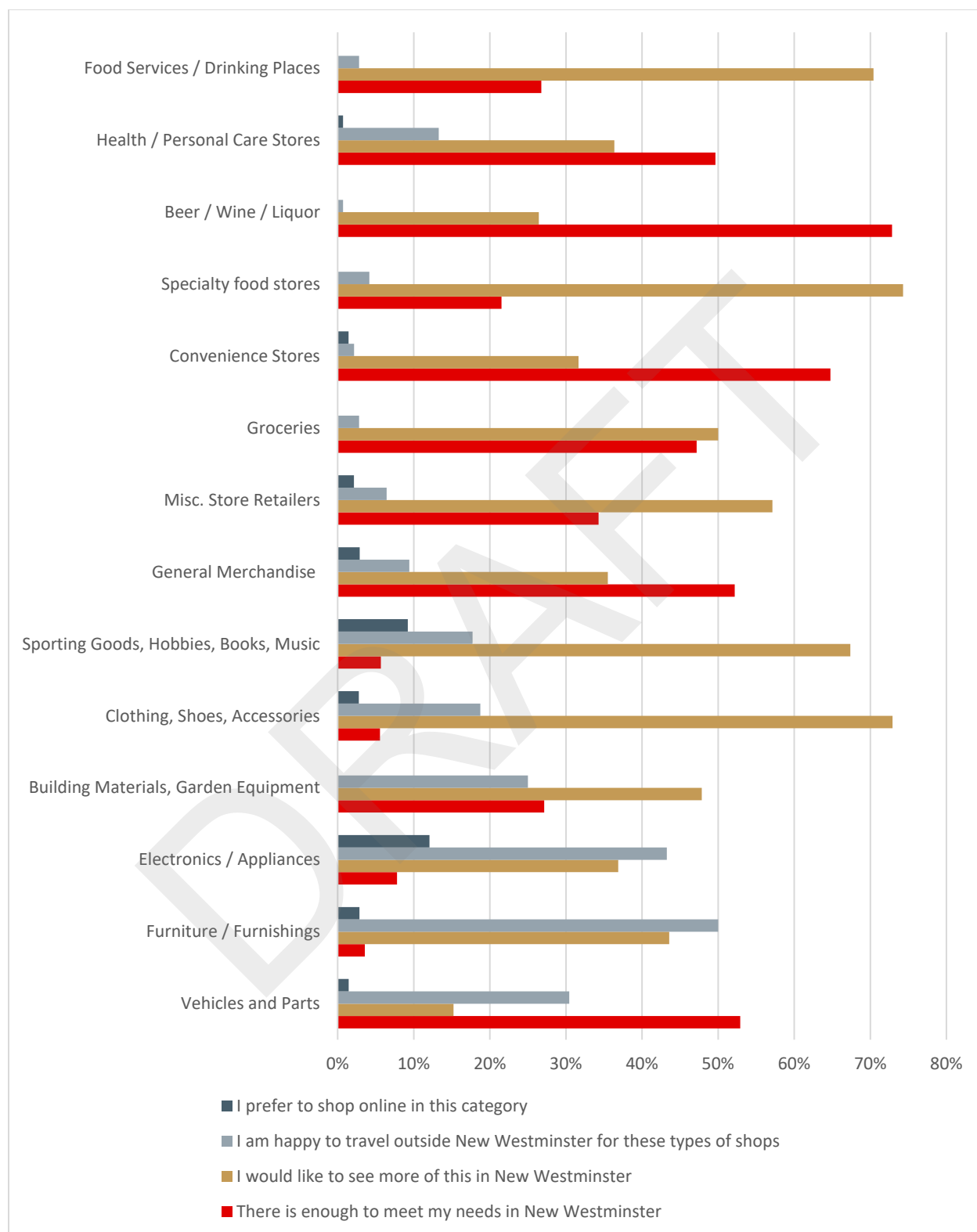
"I Am Happy To Travel Outside New Westminster For These Types of Shops"

There was not a directly inverse relationship between categories identified as locally insufficient and categories where respondents would like to see more local options. For some locally deficient categories, it appears that residents are happy to make their purchases outside the City. This is notable in the following categories:

- Furniture / Home Furnishings (50% happy to travel out of City to purchase)

- Electronics / Appliances (43% happy to travel out of City to purchase)

"I Prefer To Shop online In This Category"

There was only one category where respondents indicated a preference to make their purchases online: electronics / appliances (12%). Note that this is well below the proportion of retail sales in this category that have been made online nation-wide over the last four years.[10] Other categories with some degree of online preference include:

- Sporting Goods, Hobbies, Books, Music (9%)

- Clothing, Shoes, Accessories (3%)

- Furniture / Furnishings (3%)

- General Merchandise (3%)

"Overall, Do You Feel Current Offerings of Goods / Services Meet Your Needs?"

When asked to reflect, in general, on whether the offerings of goods and services in their local neighbourhoods meet their current needs, 30% of respondents agreed or strongly agreed, while 61% either disagreed or strongly disagreed. Reflecting on the goods / service offerings in the City more broadly, 44% either agreed or strongly agreed that the availability of goods and services today is sufficient. 30% disagreed or strongly disagreed, while 38% neither agreed nor disagreed.

Figure 4-13: "Are Current Offerings of Goods / Services Sufficient to Meet Your Needs?"

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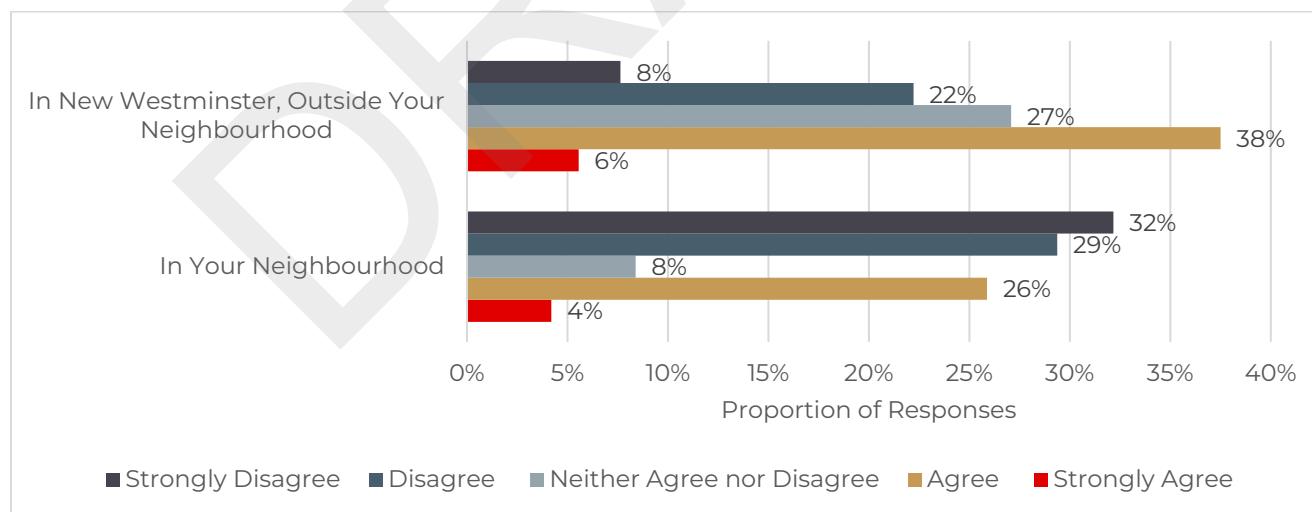
[10] Electronics / Appliance Stores e-commerce sales as % of total, nationwide: (2016 = 17%; 2017 = 18.3%; 2018 = 20.8%; 2019 = 29%; 2020 to end of May = 43.5%).

Important Attributes of Shopping Destinations

Shoppers were asked to rank their level of agreement that a series of 19 attributes are (or are not) important to them when it comes to their decisions to buy goods and services in New Westminster.

Four attributes received "definitely agreed" or "somewhat agreed" rankings from at least 90% of respondents:

- Quality of the stores / services (96%)
- Good customer service (93%)
- Clean and inviting neighbourhood (91%)
- Good value (93%)

An additional seven attributes received a combined "definitely agreed" or "somewhat agreed" ranking from between 80% and 90% of respondents:

- Attractive area to visit (89%)
- Safe area to visit (88%)
- Healthy mix of stores and services (87%)
- Business hours that fit my schedule (86%)
- Local independent businesses (86%)
- Convenient by foot or bike (85%)

The following received a greater proportion of "disagreed" scores than "agreed" scores with regards to their relative level of importance in a shopping area:

- Presence of national brands (46% agreed)
- One-stop shopping (48%)
- Events and special programing (48%)

The attributes that received the highest "neither agreed nor disagreed" scores are:

- Presence of national brands (42%)
- Events and special programing (42%)
- Discounts and promotions (41%)
- One stop shopping (34%)
- Family oriented stores and services (31%)

Figure 4-14: "To What Extent Do You Agree that These Attributes Are Important To You In Terms of Buying Goods and Services in New Westminster?"

Attribute	Definitely Agree	Somewhat Agree
Quality of the Stores / Services	78%	18%
Good Customer Service	70%	23%
Convenient by Foot or Bike	67%	18%
Clean and Inviting Neighbourhood	64%	27%
Safe Area to Visit	65%	23%
Good Value	61%	32%
Satisfies my Everyday Needs	59%	31%
Inspiring / Healthy Mix of Stores and Services	56%	31%
Business Hours that fit my schedule	56%	28%
Attractive Area to Visit	55%	34%
Local Independent Businesses	51%	35%
Is Accessible to Me	49%	32%
Convenient by Driving and Parking	45%	30%
Convenient by Transit	43%	15%
Family Oriented Stores and Services	28%	29%
Events and Special Programs	20%	28%
Discounts and Promotions	20%	31%
One-Stop Shopping	19%	29%
National Brands	12%	34%

Legend: ■ Definitely Agree ■ Somewhat Agree ■ Neither Agree nor Disagree ■ Somewhat Disagree ■ Definitely Disagree

Shopper Sentiment

Respondents were presented with 13 statements about shopping areas, their shopping perceptions and preferences, and asked whether they agreed, disagreed, or had no opinion for each statement. The single statement that was agreed to by more than 90% of respondents was: *"supporting local business is important."* This statement was agreed to by 91% of respondents, and no respondents disagreed.

The other statements with strong (.at least 80%) levels of agreement amongst respondents were:

- "Retail vacancies in my community concern me" (88% agreed)
- "I wish New Westminster had more unique shops / services (86% agreed)
- "Shopping local is more enjoyable" (84% agreed)
- "A mix of well-known brands and independents works best (82% agreed)
- I wish I could satisfy more of my day-to-day needs in New Westminster (80%)

Statements to which less than 50% of respondents agreed were:

- "Online shopping is hurting small independent business" (45% agreed, 13% disagreed)
- "It is more expensive to shop at independents" (40% agreed, 13% disagreed)
- "Shopping at big box stores is time consuming (33% agreed, 26% disagreed)
- "I am comfortable shopping for most goods online" (31% agreed, 38% disagreed)
- "Chain stores are not a good addition to neighbourhoods (24% agreed, 23% disagreed).

Figure 4-15: "What is your level of agreement with the following statements?"
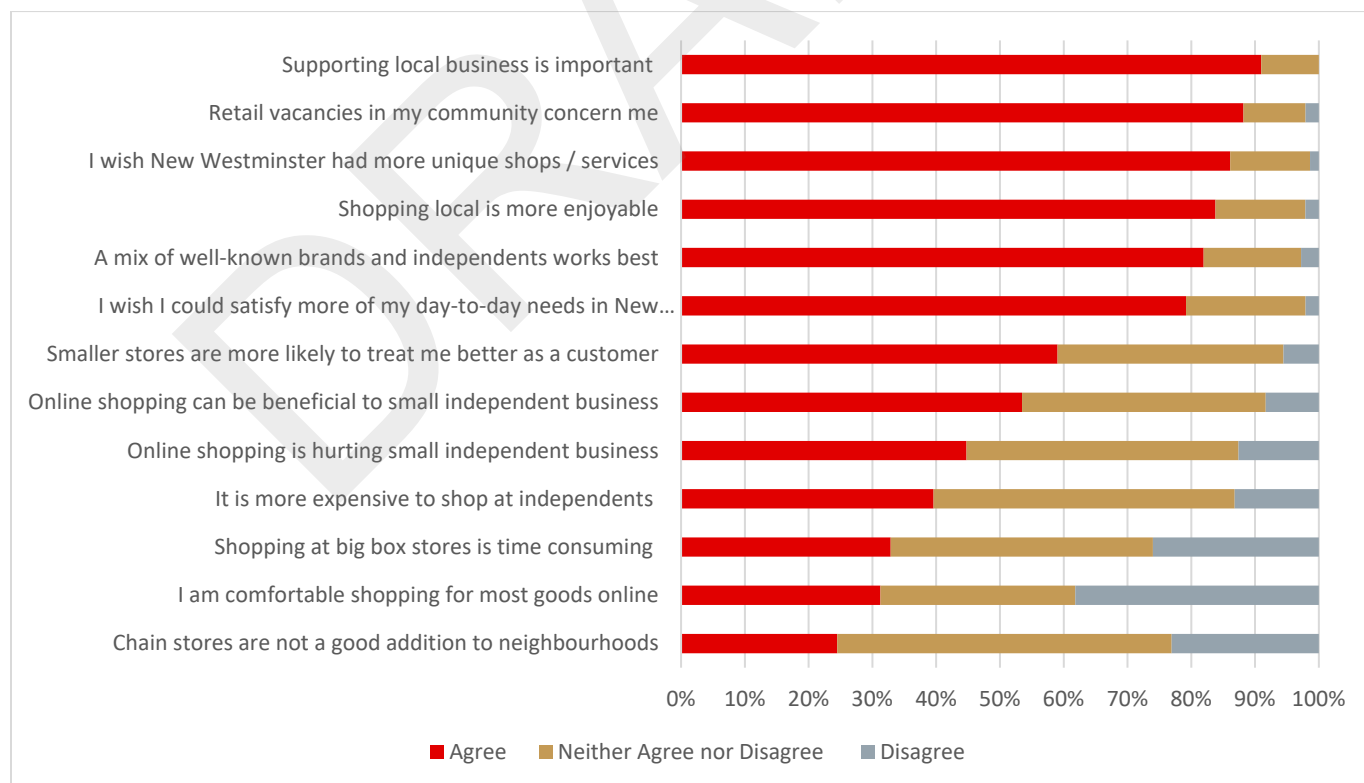
It is perhaps notable that, despite relatively low propensity for online shopping amongst respondents (with the exception of sporting goods, hobbies, toys and music), only 38% said they were not comfortable shopping for most goods online, and a majority agreed that online shopping is a growing part of a retail ecosystem that could be beneficial to independent businesses.

Changing Shopping Habits in Response to Covid-19

Respondents were asked how their shopping habits have changed since the onset of Covid-19 in March of 2020. The vast majority (90%) said that their trips to shopping malls decreased, with only 10% saying it had remained the same. A majority (>50%) of respondents indicated that their trips to shopping centres / plazas and big box stores had decreased.

Over 80% of respondents indicated that their online shopping had increased, a trend consistent with the dramatic uptick in online spending across the country.

Figure 4-16: "How have your shopping habits changed since March 2020 (onset of Covid-19)"?
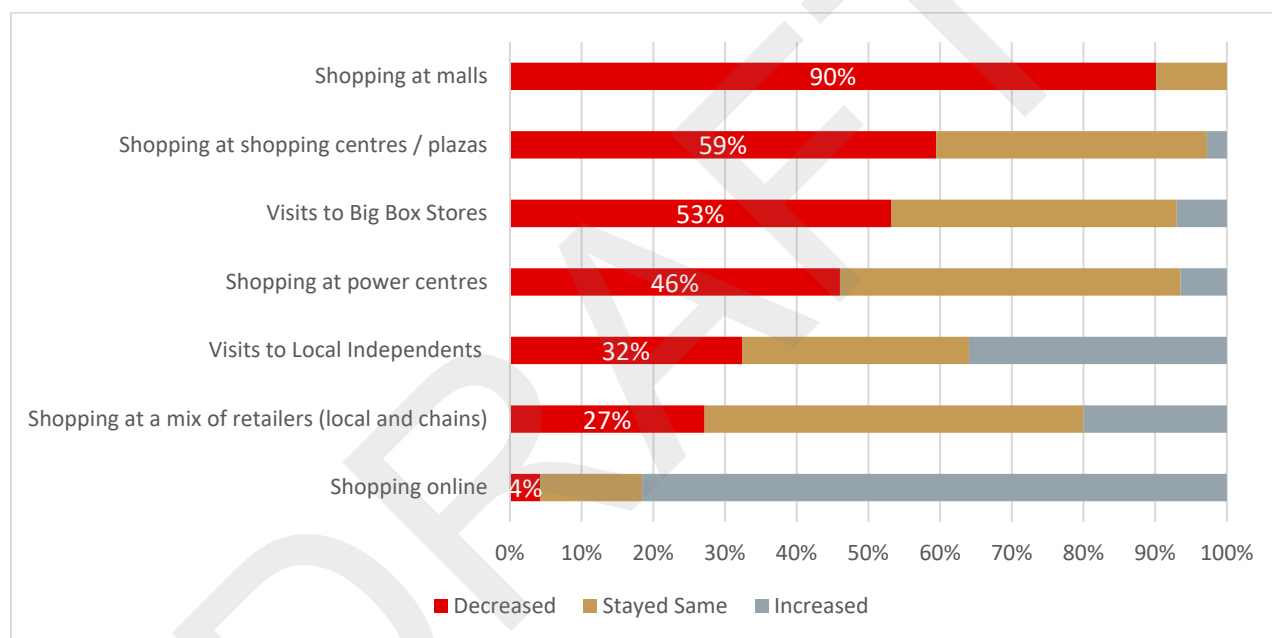
4.2.3 SYNOPSIS OF SURVEY FINDINGS

The business surveys revealed that business owners are ranking business operating costs, staffing challenges and rental rates as significant challenges of their ongoing operations. In many cases these issues have been exacerbated by COVID-19, which has led to fewer customers, and has also sparked supply chain issues that have driven up costs of goods. Despite these challenges, many business owners have a sense of optimism. Nearly 60% of respondents indicated intent to either expand their business at its current location, or keep their location and open another elsewhere in the City. Only 10% indicated intent to close their business.

Shoppers surveys are helpful in testing capture rate assumptions, which are in turn used in the process of forecasting future demand by retail category (discussed in Section 6 and 7 below). Shoppers are much more likely to purchase day-to-day convenience goods in New Westminster than comparison retail goods, the latter showing particularly significant outflow in the categories of Furniture / Home Furnishings, Electronics / Appliances, Clothing / shoes / accessories, and Sporting goods hobbies books

and music. In some cases, this outflow is simply a function of a lack of opportunity to spend their dollars locally. When polled on preferences, there was a strong desire to see more options in New Westminster in all of the above categories, with Clothing / shoes / accessories scoring highest, followed by Sporting Goods, hobbies, books and music. Interestingly, in the electronics / appliances category, over 50% of respondents said they are either happy to purchase outside New Westminster, or they would prefer to purchase online.

Shoppers are attracted to shopping areas that are physically attractive, safe, and offering a healthy mix of stores and services with consistent business hours that meet their needs. Shoppers also indicate a high level of agreement that supporting local independent businesses is important, provided that they are providing a high quality of goods and services, and a good customer service experience. There was concern over retail vacancies in some areas, and a desire for more unique shops and services to emerge in the City over time.

5.0 MOBILITY DATA BACKGROUNDER

5.1 OVERVIEW

To guide the process of retail trade area delineation (discussed in Section 7.0 below), cell phone mobility data was used to determine how people interact with the City of New Westminster's commercial areas. Through an assessment of actual movement patterns, we are able to have a clearer understanding of how people move into, out of, and within commercial areas, and the geographic extent of each area's draw.

Cell phone mobility data was acquired from *Near Data Intelligence* (formerly Uber Media), and was acquired for the 2019 calendar year. While 2020 data was available for purchase, the 2019 data set was selected as it was the last full year of information available that was not affected by the Covid-19 pandemic. While we do not expect that future 'post-Covid' mobility patterns will exactly mirror the past (particularly as the pandemic drags into a third calendar year, likely shaping longer-term habits and patterns), we believe that the 2019 movement patterns will more closely resemble future patterns when compared to those of 2020.

The data purchase was based on the municipal boundaries of New Westminster. This does not, however, mean that it only captures movement patterns originating and remaining within the City. Rather, the data captures cell-phone-recorded movements into, out of, and within the City boundaries over the course of one year. Regardless of whether a mobility device holder was a resident of New Westminster or not, if that device was present somewhere within the City's borders in 2019, it would be part of the data set. The data allows for analysis at the municipal scale, and further refinement to isolate analysis at the scale of individual neighbourhoods or commercial streets.

5.2 DATA SETS USED

The mobility data analysis is built around four distinct data sets:

1. **Common Evening Locations (CEL)**:   the 'evening locations' (more than 8 contiguous hours) that tracked mobile devices return to on a regular basis, over a 2-month period. This can be interpreted as the "home location" of a unique visitor.

2. **Common Daytime Location (CDL):**   the 'daytime locations" that tracked devices return to on a regular basis over a 2-month period. For some, the CDL may also be their home (e.g., home-based employee or business). For others, it may be a school, office, retail location, or institutional setting.

3. **Generator report** (also known as the *Tourist Data Set)*: the Generator Report (regional) details locations that differ from the Common Evening Locations, in that they only focus on evening and daytime locations for the 7 days leading up to entering the study area (in this case, anywhere in the City of New Westminster). For example, if a visitor's CEL is somewhere in Europe, but they visited New Westminster in 2019, their accommodation location while in the Lower Mainland would show up in the Generator Report.

4. **PIN Report:**   this is the largest of the 4 purchased datasets, and details movements within the study area (municipal extent) with attributes that include the date, day of the week, and time of day calculated in seconds. The PIN report holds large volumes of point-based data (confined to the study area) that requires significant enriching and analysis to extract meaning and trends.

For cost efficiency reasons, the fifth available dataset called the "Pathing Report" was not obtained for the purposes of this analysis. That report duplicates the information found in the PIN report, with the addition of movements for 2 hours before entering and after exiting the study area.

5.3   DATA ANONYMITY CONSIDERATIONS

It is important to note that these mobility datasets *do not contain any personal information*. Rather, they are linked by a long, cryptic, alphanumeric device ID. In addition, CEL and CDL locations are "jittered" for privacy, meaning that each data point is moved by up to 50 metres in a random direction from its actual point of recording. The Device ID is the only way to link the various datasets.

For example, if one wanted to analyse a sub-set of the PIN Report (say, all movements into, out of and within a particular shopping centre) and then report on the associated Common Evening Locations, one would need to spatially query the PIN Report and then link the selected Unique Device IDs to the CEL Report.

5.4   DATA USES AND LIMITATIONS

The datasets acquired and analysed for this study, as detailed in section 6.2 above, capture a wealth of mobility information that requires substantial analysis. The data can be used to inform a wide array of use pattern questions, such as customer dwell times, peak visitation hours, pace of movements, and movement patterns. The data does not, however, allow for reporting on absolute volumes, such as the total number of visitors in a given day, or a week, or over a year. The data is a subset of an unknown true total visitation figure. Without that known denominator, one cannot reliably report on the dataset's true proportional representation.

As no personal information is contained within the datasets, any statistics around markers like age, wealth, and education are not directly available. These markers can be "enriched" by aggregating things like CELs by Census Tract or Dissemination Area. This type of data overlay can allow for explorations of questions such as: "do visitors to the Queensborough commercial areas tend to have higher or lower incomes than visitors to New Westminster as a whole?" Or, "do visitors to Sapperton tend to be older or younger than visitors to New Westminster as a whole?"

For this analysis, the primary purpose of acquiring and analysing mobility data is to guide the delineation of reasonably accurate primary trade areas (PTAs) for each of New Westminster's commercial areas. Trade are delineation is a critical component in commercial market demand analysis. By correctly defining the primary geography from which customers to a given area are drawn, we can then look at that area's characteristics, incomes and spending profiles, project how that area is likely to grow and change in the coming years and use that as a basis upon which to project the extent and nature of supportable commercial spaces in the future. The uses of mobility data for trade area delineation are explored further in Section 6 below.

5.5   DATA SOURCES

The mobility data sets are collected by Near Intelligence from a variety of sources.

- "Second-party locations:"   Near partners with other location-collecting providers to increase their available data sets. Partner providers are tied to over 400 commonly used mobile device applications.

- "Owned and operated apps:"   Near is itself an application publisher and as such, collects location data from location-enabled users of their six social media apps.

- "Bid Stream Data:"   Near is also a marketing DSP and participates in ad exchanges, allowing them to collect location data in the process of displaying ads in over 100,000 applications. These datasets are known as "RTB data" and are provided by the exchanged as reported by app publishers.

6.0 RETAIL TRADE AREA ANALYSIS

Urban Systems undertook a comprehensive analysis of retail demand across the City of New Westminster, leveraging the previously outlined mobility data analysis and a solid understanding of retail-commercial supply by node to establish effective trade areas, both within and outside the city boundaries. The intent of this approach is to ground assumptions related to the city's retail drawing power in both primary research (survey data) and observable patterns of movement.

6.1 KEY COMPONENTS

This retail demand analysis includes the following components:

- **Key Implications - Mobility Data Analysis**: Assessing the results of Urban Systems' analysis of City of New Westminster mobility data analysis, leveraging the city's mobility dataset covering the full 2019 calendar year, in terms of the shopping patterns (i.e. visits to commercial nodes) of:

  - *New Westminster residents* within the City of New Westminster

  - *Non-New-Westminster-residents* within the City of New Westminster

- **Retail Trade Area Delineation**: Rationalization of New Westminster retail trade areas – both local and regional – supported by the results of the mobility data analysis

- **Retail Trade Area Analysis** – Assessment of key population growth and demographic characteristics – determination of key inputs driving quantification of retail demand by category

Each of these critical demand components is described and outlined in the sections below.

6.2 MOBILITY DATA ANALYSIS IMPLICATIONS FOR TRADE AREAS

As noted in Section 6.0, the primary intent of Urban Systems' visual analysis of city-wide mobility data for the 2019 calendar year was to establish a clear understanding of pre-pandemic patterns of visitation (for both residents and non-residents) to support effective trade area delineation. Without a proper understanding of retail market drawing power (i.e., the geographic extent to which New Westminster tends to attract commercial visits from beyond the city boundaries) and patterns of commercial visitation within the city, understanding of key nodes' role and function as retail-commercial nodes is not possible.

Implications of the mobility analysis for both residents and non-residents of the City of New Westminster are outlined below.

6.2.1 NEW WESTMINSTER RESIDENTS

From a retail market perspective, it is important to first understand where within the city residents (and mobility data points) live and the extent of these residents' total visits to commercial areas within a given year. To establish likely place of residence, the reviewed mobility data was assessed for "Common Evening Locations" across all visits to any of New Westminster's commercial areas. The results are shown in the heat map (Figure 7-1) below.
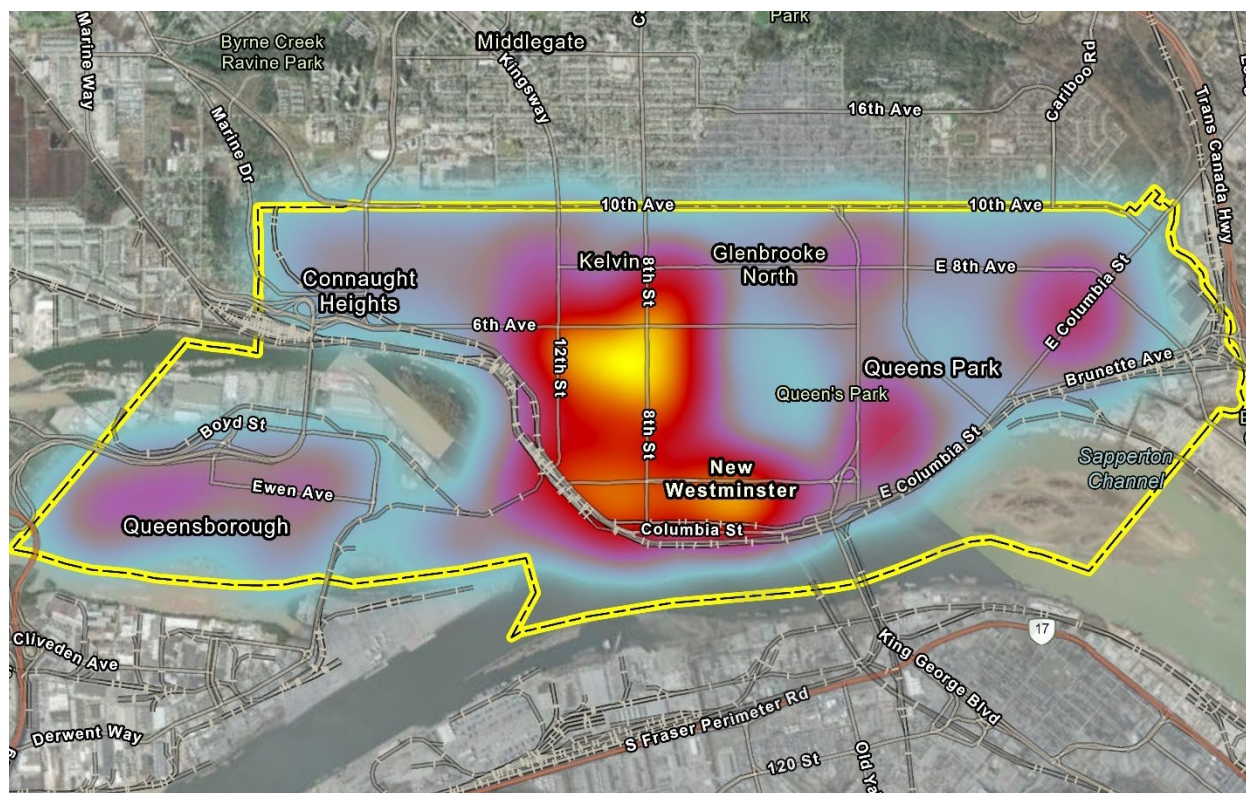
Figure 6-1 - Common Evening Locations for Resident Visits to New West Commercial Areas

The patterns depicted above clearly align with the extent of clustered residential dwellings across the City of New Westminster, with the highest concentrations found in both the Downtown and Uptown areas. These areas align with the city's highest frequency transit routes, both SkyTrain, and bus. Though the highest concentrations of residents are found in these two connected areas, there are also significant clusters of residents in other key areas driving business across the City's various commercial nodes, including Queensborough, Sapperton, Victoria Hill, and Connaught Heights.

Continued densification around the city's SkyTrain stations, including throughout the Downtown (Columbia and New West stations), Sapperton (Sapperton and Braid stations) and Connaught Heights (22nd Street station) will drive higher concentrations of new residents and increased numbers of local commercial patrons.
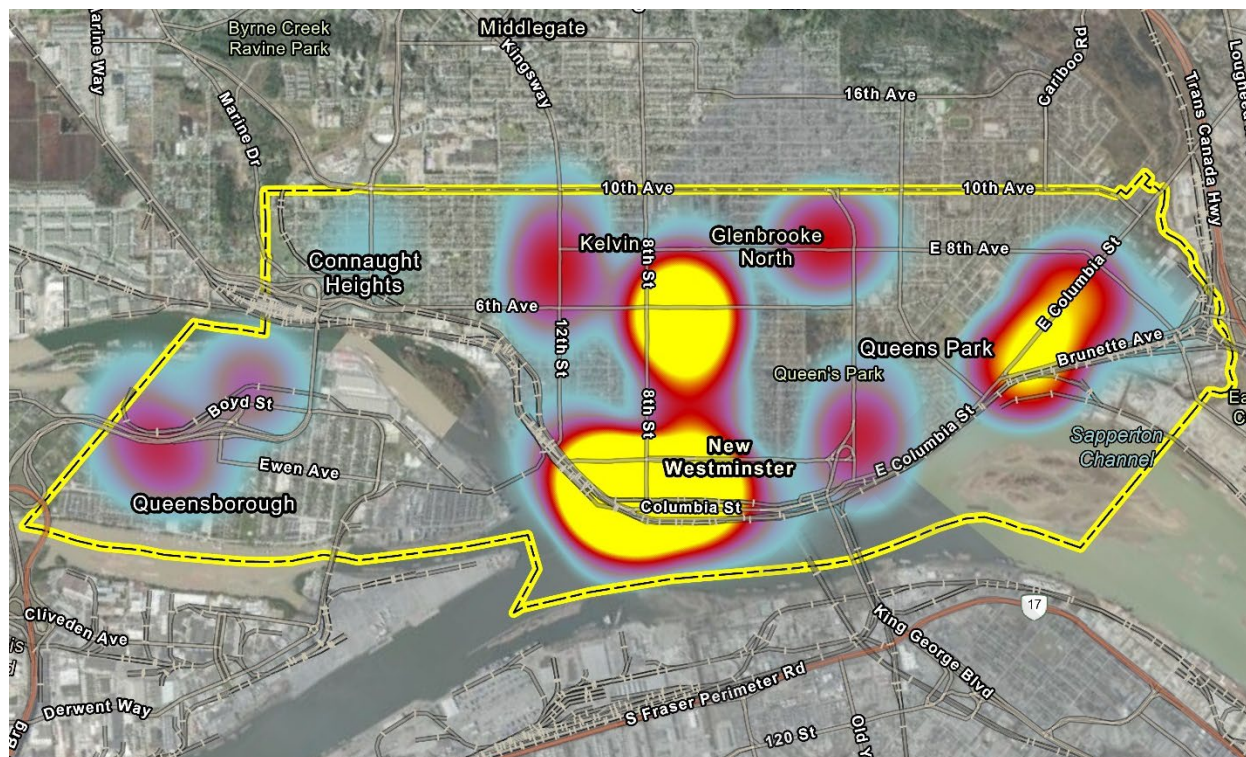
Figure 6-2 - New Westminster Commercial Activity Hotspots - New Westminster Residents

In terms of activity concentrations based on unique visits (Figure 7-2 above), there are clear and emerging patterns in New Westminster, with the top three activity "hot spots" being Uptown (centered at 6th Ave. and 6th St.), Downtown (Columbia between 4th and 12th Streets) and Sapperton (East Columbia to Braid). These higher concentrations of activity coincide with both high – and increasing – residential density and high employment opportunities. This is particularly true of Sapperton, where the extent of residential density alone would not likely support the full extent of existing retail-commercial uses without the additional support of a significant daytime working population driven by medical and health care services clustered around Royal Columbian Hospital.

As a precursor to highlighting key trade area demographics, the following table compares the employment population estimates within the Downtown, Uptown, and Sapperton areas:

Table 6-1 - Daytime Working Population Estimates - Select Trade Areas (Usual Place of Work)

New Westminster Trade Area	Daytime Employment (2021)	% of City-Wide Totals
Downtown	5,117	22%
Uptown	4,908	21%
Sapperton	4,340	19%
Sub-Total – Above Areas	**14,365**	**62%**
City of New Westminster	**23,173**	

Source: Urban Systems trade areas, Environics Analytics estimates (Sitewise Pro).

Roughly 62% of the City's daytime working population – with a usual place of work – is employed in either the Downtown, Uptown, or Sapperton areas.

Table 6-2- Daytime Working Population Estimates - Select Trade Areas (Work at Home)

New Westminster Trade Area	Daytime Employment (2021)	% of City-Wide Totals
Downtown	1,665	18%
Uptown	1,937	21%
Sapperton	889	10%
Sub-Total – Above Areas	**4,491**	**49%**
City of New Westminster	**9,277**	

Source: Urban Systems trade areas, Environics Analytics estimates (Sitewise Pro).

Given the impact of the Covid-19 pandemic, which began to be felt in early 2020, it is important also to consider the extent of daytime workers conducting their business from home. Estimates of daytime work-at-home populations for these same areas are summarized above in Table 7-2. As outlined, there are an estimated 4,500 daytime workers operating from a home location, which accounts for just under half the city-wide estimate of about 9,300.

The significantly lower proportion of home-based jobs recorded for Sapperton is indicative of both the extent of work requiring on-site presence (i.e. service sectors) and of the still modest levels of residential density (focused primarily in the Brewery District area). This proportion may increase as additional residential density is added in the Sapperton area, particularly near Braid Station.

Several key observations relating to the commercial activity hot spot map in Figure 7-2 include:

- Highest concentration of observed activity in the commercial centres of Downtown and Uptown, which together form the commercial spine (both east-west along Columbia and north-south along 6th St.) of the city

- High levels of activity in the commercial area of Sapperton, however this is driven by high levels of daytime employment, which in retail market terms tends to support spending mainly on restaurant food & beverage and convenience service-oriented businesses

- Relatively low levels of observed resident activity in the Queensborough commercial area, more in line with levels observed in other more local-focused commercial areas in the city. This is likely due to resident activity being somewhat more focused on neighbourhood and community-oriented, rather than destination retail businesses. As discussed in this report's retail-commercial supply/inventory section (Section 4.0 above), Queensborough Landing is an open-format shopping centre that tends to draw patronage from a wider geographic area.

- More local-focused commercial areas, based on both scale and intensity of visually assessed mobility activity observed in Figure 7-2, include 12th Street, McBride & 6th, and the Victoria Hill area. The Connaught Heights area should see an increase in activity as the 22nd Street station node continues to evolve.

6.2.2 VISITORS (NON-RESIDENTS) TO NEW WESTMINSTER

Given the importance of assessing regional drawing power to an understanding of a given retail market's role and function, it is important to also review activity in New Westminster's commercial centres driven by non-residents generally, and non-resident / non-workers more specifically. Common Evening Locations for non-resident visits to New Westminster commercial areas are presented in Figure 7-3.
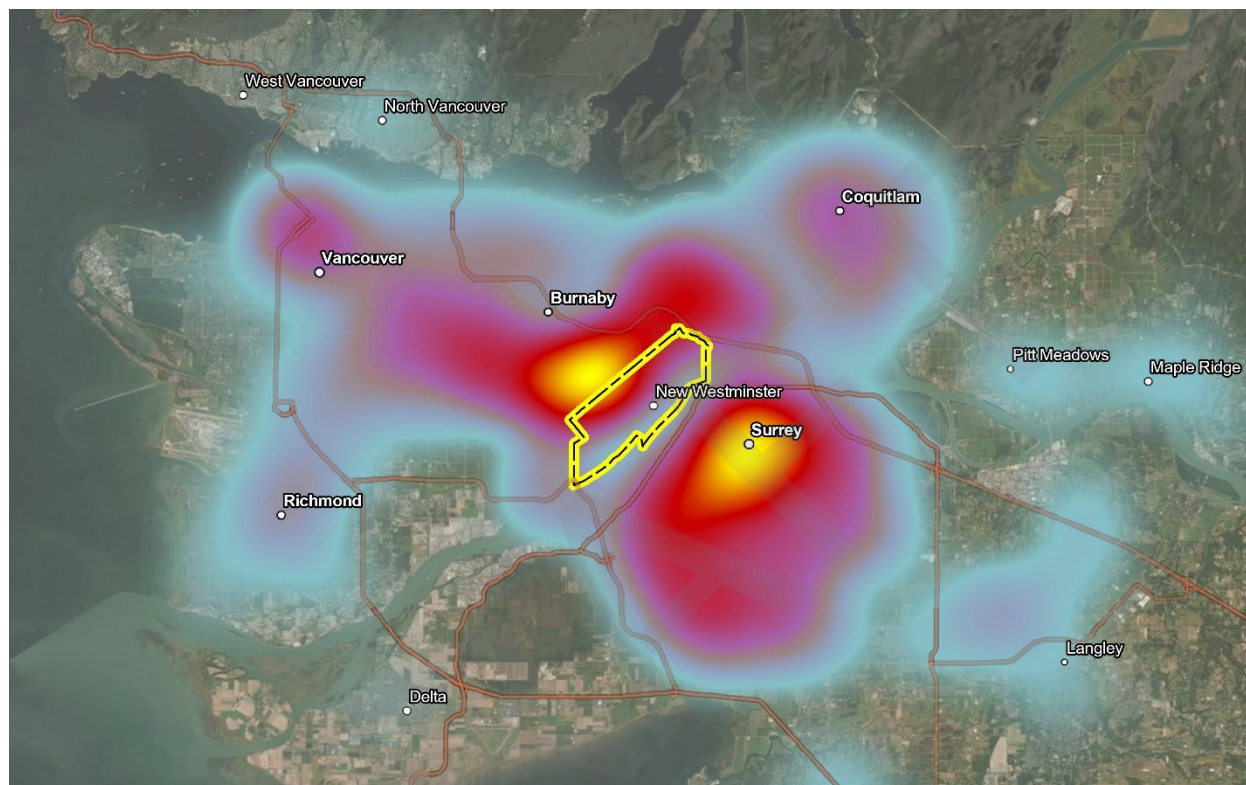
Figure 6-3 - Common Evening Locations for Non-Resident Visits to New West Commercial Areas

The patterns depicted in the heat map above indicate that the city's primary pockets of visitors (non-residents) tend to be from southeast Burnaby and northwest Surrey. This pattern is indicative of a community with commercial areas that are, by and large, more "community-serving" rather than destination draws from a retail standpoint. Though New Westminster does draw some destination commercial visitation from further afield in the region, particularly in areas with SkyTrain access, the primary drivers of visitation are neighbourhoods bordering the City to the northwest and southeast.

Urban Systems also "sifted out" non-residents who are also working generally full-time hours in New Westminster, to see how the removal of this sub-set of visitors may impact the overall observed patterns of commercial area visitation. This sifting exercise is important as daytime workers with a usual place of work in the city will tend to spend more on convenience-oriented food and service-oriented businesses, typically before work hours and during the lunch hour. For illustrative purposes, non-resident New Westminster workers' likely place of residence is indicated in Figure 7-4 below.
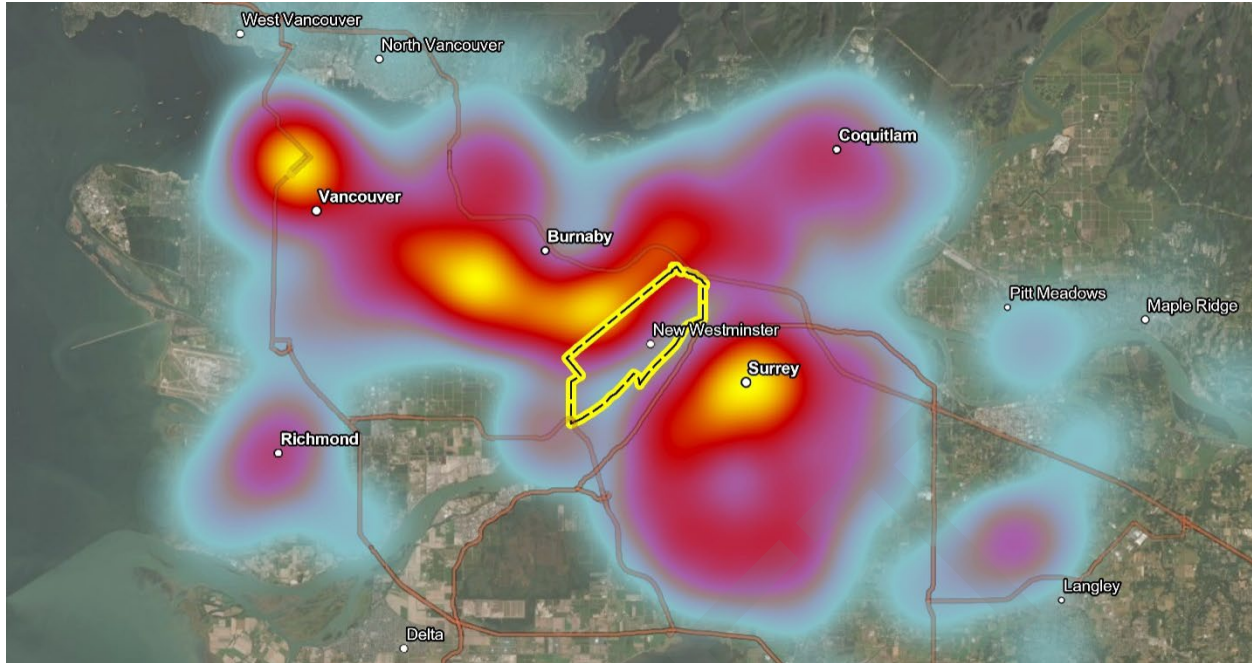
Figure 6-4 - Common Evening Locations for Non-Resident New Westminster Daytime Workers

The pattern observed above is indicative of the extent of the City of New Westminster's employment drawing power, which actively leverages the region's SkyTrain network. The patterns observed in this common evening location heat map show that New Westminster is drawing commuters from a much wider region than typical visitors (patrons) to commercial areas, a function of the extent of quality employment opportunities available in the city, particularly in the Uptown, Downtown and Sapperton areas. Actual non-resident commercial activity hot spots in the City of New Westminster are highlighted in Figure 7-5.
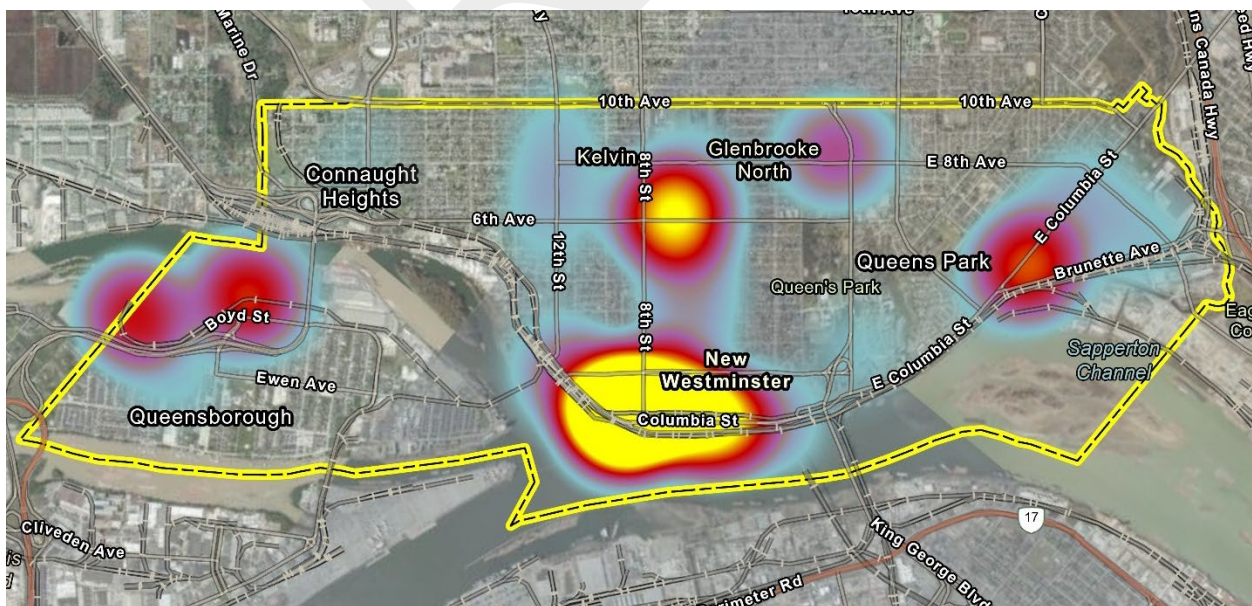
Figure 6-5 - New Westminster Commercial Activity Hotpots - Non-Residents

This commercial activity heat map, focused on non-residents who are not working in New Westminster, is more indicative of the primary geographic foci of New Westminster's destination commercial activities. These include destination retail, arts and culture, entertainment, restaurant, health and social services and other (i.e., gaming) activities.

6.3   RETAIL TRADE AREA DELINEATION

With a better understanding of the patterns of activity in New Westminster's various commercial areas (for both city residents and non-residents), the nature and extent of the city's local and more regional-serving trade areas can more effectively be established. For the purposes of this city-wide retail study, the following key factors supported delineation of the city's various retail trade areas:

- **Local neighbourhood and community-serving functions** – Each of New Westminster's commercial areas, regardless of scale and broader range of function, serves a local resident population. This is as true for Queensborough as it is for 12th Street, Uptown or Downtown.

- **Extent of regional drawing power** – It is important to understand those areas outside the city boundaries from which residents are most likely to visit New Westminster commercial areas for commercial shopping, dining and entertainment purposes. As noted earlier in this section, this is observed to be primarily southeast Burnaby, along with southwest Coquitlam and northwest Surrey.

- **Pattern of employment vs. general visitor attraction** – Daytime employees' shopping patterns are vastly different than those of destination shoppers, as their primary purpose in a given day is work-related. This tends to drive spending in more select categories (e.g., restaurant food & beverage, convenience food, personal and professional services, health and personal care products) and at more specific times of day (before and after work, during lunch hours).

- **Similarity of shopping patterns due to local area commonalities** – Local area demographic composition and patterns of shopping driven by the nature, quality and extent of local retail and service offerings in a given node will tend to be different area to area. While New Westminster residents will, for example, patronize businesses across the city, they will tend to frequent clusters of businesses closer to home for their day-to-day needs.

- **Dividing up the City of New Westminster into discrete local trade areas** offers several clear advantages:

  o Opportunity to better understand demographic composition at a more local level, to support more effective retail demand analysis and related planning

  o Opportunity to explore the inter-relatedness of New Westminster's commercial areas, as local residents within each local area will naturally patronize businesses across a range of local commercial clusters, but with a tendency to focus day-to-day shopping trips on those clusters – and areas – located closest to home

  o Ability to assess likely market capture locally – across an array of local neighbourhood clusters – as well as the likely extent of retail spending outflow to areas outside the city

The retail trade areas that form the basis for demand and opportunity analysis are depicted in Figure 7-6 below.

Figure 6-6 - New Westminster Primary and Secondary Retail Trade Areas

The New Westminster retail demand model has been developed with these common local (Primary Trade Areas, or PTAs)) and regional (Secondary Trade Areas, or STAs).

An additional and important benefit of establishing a set of local PTAs is that it will facilitate ongoing tracking of key demographics, spending by category estimates, and comparisons between demand and local supply over time. These area definitions can also support reviews of both established clusters (e.g., Uptown, 12th Street, Downtown) and emerging local nodes (e.g., 22nd Street station area).

6.4   TRADE AREA DEMOGRAPHIC CHARACTERISTICS

Urban Systems' retail demand modeling for New Westminster is driven by shifting patters of spending across a wide array of retail categories, as defined according to the North American Industry Classification System (NAICS). This approach allows for effective comparison of demand-side market support and local supply, with local supply also being classified by NAICS category as part of the city-wide inventory process.

Though a broad array of demographic characteristics has been compiled to support this retail trade area analysis, and Excel-based workbooks containing a greater level of detail can be made available to City staff as a reference, this section focuses on a select list of key demographic indicators, to better understand comparative demographic composition across defined geographic trade areas. These comparative profiles by select indicator are listed below.

6.4.1 TRADE AREA POPULATION GROWTH (2016 TO 2021)

Population growth by defined primary and secondary trade area is presented in Table 7-3.

Table 6-3: Trade Area Population Growth, 2016 to 2021

Trade Area	2016 Population	2021 Population	2016-21 % Change
Downtown PTA	**10,074**	**11,778**	**16.9%**
12th Street PTA	10,540	11,440	1.8%
West End PTA (22nd St. station)	**4,395**	**4,789**	**9.0%**
Uptown PTA	17,676	19,199	3.7%
6th & McBride PTA	**11,917**	**13,352**	**12.0%**
Sapperton PTA	**7,500**	**8,094**	**7.9%**
Queensborough PTA	**9,326**	**11,021**	**18.2%**
Lougheed (SW Coquitlam) STA	35,182	39,130	7.7%
Southeast Burnaby STA	46,504	47,676	2.5%
Northwest Surrey STA	27,153	27,967	3.0%
City of New Westminster	*74,562*	*82,940*	*11.2%*

Source: Urban Systems trade area delineations, Environics data via Sitewise Pro.
* 2021 estimates as calculated by Environics data algorithms in advance of full 2021 Census data releases

- The **Downtown PTA** saw an increase of more than 1,700 residents (roughly 17%) over the 2016-21 period, accounting for approximately 20% of the city-wide increase of 8,380 residents.

- The **Queensborough PTA** also recorded an increase of nearly 1,700 residents (about 18%) over the same period.

- The **6th & McBride PTA** saw an increase of more than 1,430 residents (or 12%) over this same 2016-21 period.

- In terms of secondary trade area growth, the **Lougheed STA** recorded the highest growth at 7.7% - adding nearly 4,000 residents, mostly in the Lougheed Town Centre area. Both the **Southeast Burnaby** and **Northwest Surrey** STA areas saw more modest, but still healthy, growth of 2.5% and 3.0%, respectively.

6.4.2 TRADE AREA POPULATION BY AGE PROFILE

Population by age profiles for each of the defined New Westminster Retail Trade areas are outlined in Table 7-4.

Table 6-4 - Trade Area Population by Age Profile

Population by Age Cohort	DT PTA		12th St. PTA		West End PTA		Uptown PTA		6th & McBride PTA		Sapperton PTA		Queensborough PTA	
0 to 19 years	1,028	8.7%	2,017	17.7%	946	19.8%	2,635	13.8%	2,210	16.6%	1,478	18.3%	2,534	22.9%
20 to 34 years	4,266	36.3%	2,741	24.0%	1,062	22.1%	4,286	22.3%	2,528	19.0%	1,838	22.7%	2,365	21.5%
35 to 44 years	2,173	18.4%	1,840	16.1%	625	13.0%	2,613	13.6%	1,916	14.3%	1,320	16.3%	2,139	19.4%
45 to 54 years	1,429	12.1%	1,716	15.0%	716	15.0%	2,678	13.9%	1,836	13.8%	1,087	13.4%	1,692	15.4%
55 to 64 years	1,421	12.1%	1,692	14.8%	703	14.7%	2,896	15.1%	1,982	14.8%	1,162	14.4%	1,218	11.0%
65 to 74 years	956	8.1%	954	8.3%	465	9.7%	2,249	11.7%	1,578	11.8%	745	9.2%	687	6.2%
75 years & over	505	4.0%	479	4.0%	271	6.0%	1,843	10.0%	1,302	10.0%	463	6.0%	387	4.0%
Total Population	**11,778**		**11,440**		**4,789**		**19,199**		**13,352**		**8,094**		**11,021**	
Median Age	**37.3**		**39.8**		**40.9**		**45.3**		**45.1**		**40.2**		**37.6**	
Population by Age Cohort	Lougheed STA		SE Burnaby STA		NW Surrey STA		British Columbia		New Westminster, BC					
0 to 19 years	6,397	16.9%	8,782	18.4%	5,292	18.9%	980,378	19.0%	13,146	15.8%				
20 to 34 years	10,052	26.5%	12,013	25.2%	7,303	26.1%	1,063,224	20.7%	19,595	23.6%				
35 to 44 years	5,686	15.0%	7,205	15.1%	4,033	14.4%	697,962	13.6%	13,133	15.8%				
45 to 54 years	4,937	13.0%	6,234	13.1%	3,765	13.5%	662,862	12.9%	11,593	14.0%				
55 to 64 years	4,928	13.0%	6,039	12.7%	3,949	14.1%	729,601	14.2%	11,647	14.0%				
65 to 74 years	3,434	9.1%	4,133	8.7%	2,208	7.9%	591,706	11.5%	8,179	9.9%				
75 years & over	2,446	6.0%	3,269	7.0%	1,418	5.0%	423,689	8.0%	5,647	7.0%				
Total Population	**37,878**		**47,676**		**27,967**		**5,149,422**		**82,940**					
Median Age	**39.0**		**38.9**		**38.2**		**42.5**		**41.3**					

*Source: Urban Systems trade area delineations, Environics data via Sitewise Pro. * 2021 estimates calculated by Environics data algorithms in advance of full 2021 Census data releases*

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Trade area age profile highlights include:

- **Highest proportions of youth aged 19 years or under** are found in the Queensborough (23%), West End (19.8%), Sapperton (18%) and 12th Street (18%) PTA areas.

- **Highest proportions of senior residents aged 75 years or older** are found to be in the Uptown and 6th & McBride PTA areas of New Westminster.

- **Median ages** are lowest in the **Downtown** (37.3) and Queensborough (37.6) areas and highest in the Uptown (45.3) and 6th & McBride (45.1) areas.

Columbia Street Looking Northeast – Downtown New Westminster

6.4.3 TRADE AREA HOUSEHOLD SIZE PROFILE

Average household sizes are naturally smaller in those areas of New Westminster with the highest proportions of higher density, multi-family dwellings, namely in the Downtown (1.93), Uptown (2.02) and 12th Street (2.33) PTA areas. They are significantly higher in lower density, single-family-oriented PTA areas, including the West End (3.10) and Queensborough (3.28) areas.

Table 6-5 - Trade Area Household Size Profile

	DT PTA		12th St. PTA		West End PTA		Uptown PTA		6th & McBride PTA		Sapperton PTA		Queensborough PTA	
		%		%		%		%		%		%		%
2021 Households by Size of Household	**6,000**	**%base**	**4,874**	**%base**	**1,529**	**%base**	**9,365**	**%base**	**5,589**	**%base**	**3,164**	**%base**	**3,360**	**%base**
1 person	2,512	41.9%	1,841	37.8%	308	20.2%	4,433	47.3%	2,001	35.8%	1,040	32.9%	551	16.4%
2 persons	2,451	40.9%	1,529	31.4%	432	28.2%	2,824	30.2%	1,931	34.5%	965	30.5%	963	28.6%
3 persons	622	10.4%	697	14.3%	276	18.1%	1,008	10.8%	780	14.0%	523	16.5%	679	20.2%
4 persons	252	4.2%	503	10.3%	295	19.3%	740	7.9%	579	10.4%	417	13.2%	629	18.7%
5 or more persons	163	2.7%	304	6.2%	218	14.2%	359	3.8%	298	5.3%	219	6.9%	539	16.0%
2021 Persons in Households	**11,592**		**11,371**		**4,741**		**18,919**		**12,860**		**7,932**		**11,015**	
Persons per household	**1.93**		**2.33**		**3.10**		**2.02**		**2.30**		**2.51**		**3.28**	

	Lougheed STA		SE Burnaby STA		NW Surrey STA		New Westminster, BC		British Columbia					
		%		%		%		%		%				
2021 Households by Size of Household	**15,619**	**%base**	**17,277**	**%base**	**10,380**	**%base**	**35,558**	**%base**	**2,018,734**	**%base**				
1 person	4,918	31.5%	4,567	26.4%	3,197	30.8%	13,364	37.6%	582,789	28.9%				
2 persons	5,179	33.2%	5,120	29.6%	3,014	29.0%	11,824	33.3%	710,804	35.2%				
3 persons	2,639	16.9%	3,107	18.0%	1,519	14.6%	4,749	13.4%	296,803	14.7%				
4 persons	1,960	12.5%	2,575	14.9%	1,339	12.9%	3,474	9.8%	259,858	12.9%				
5 or more persons	923	5.9%	1,907	11.0%	1,311	12.6%	2,147	6.0%	168,480	8.3%				
2021 Persons in Households	**37,699**		**46,605**		**27,522**		**81,682**		**5,054,879**					
Persons per household	**2.41**		**2.70**		**2.65**		**2.30**		**2.50**					

*Source: Urban Systems trade areas, Environics data via Sitewise Pro. * 2021 estimates calculated by Environics data algorithms in advance of full 2021 Census data releases*

All else being equal, areas with higher proportions of single or two-person households tend to drive higher per capita spending on restaurant food & beverage. This would include, notably, the Downtown (83% of households) and Uptown (77% of households).

6.4.4 TRADE AREA HOME OWNERSHIP PROFILE

City-wide, New Westminster has an enviable mix of tenure, with roughly 57% of dwellings owned vs. 43% rented. This compares to 68% owned vs. 32% rented at the provincial level. The highest proportions of rented dwellings tend to be found in those areas of the city with the highest proportions of multi-family housing stock, particularly older multi-family housing stock (built 25 or more years ago).

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Table 6-6 - Trade Area Housing Tenure Profile

	DT PTA	%	12th St. PTA	%	West End PTA	%	Uptown PTA	%	6th & McBride PTA	%	Sapperton PTA	%	Queensborough PTA	%
2021 Occupied Private Dwellings by Tenure	6,000	%base	4,874	%base	1,529	%base	9,365	%base	5,589	%base	3,164	%base	3,360	%base
Owned	3,414	56.9%	2,241	46.0%	1,045	68.3%	3,881	41.4%	3,900	69.8%	1,898	60.0%	2,430	72.3%
Rented	2,586	43.1%	2,632	54.0%	484	31.7%	5,484	58.6%	1,690	30.2%	1,266	40.0%	930	27.7%

	Lougheed STA	%	SE Burnaby STA	%	NW Surrey STA	%	New Westminster, BC	%	British Columbia	%
2021 Occupied Private Dwellings by Tenure	15,619	%base	17,277	%base	10,380	%base	35,558	%base	2,018,734	%base
Owned	8,843	56.6%	10,136	58.7%	5,145	49.6%	20,103	56.5%	1,362,489	67.5%
Rented	6,776	43.4%	7,140	41.3%	5,235	50.4%	15,455	43.5%	652,497	32.3%

*Source: Urban Systems trade areas, Environics data via Sitewise Pro. * 2021 estimates calculated by Environics data algorithms in advance of full 2021 Census data releases*

As outlined in Table 7-6, the highest proportions of home-owners and renters are found in the following New Westminster trade areas:

- Higher Home-Ownership Rates: Queensborough (72%), 6th & McBride (70%) and West End (68%) PTA areas

- Higher Proportions of Renters: Uptown (59%), 12th Street (54%), Downtown (43%) and Sapperton (40%) PTA areas

All else being equal, per capita spending on home improvement tends to be higher in areas with higher rates of home ownership; however, per capita spending on other retail and service categories tends to be more driven by age and income differentials.

6.4.5 TRADE AREA VISIBLE MINORITY PROFILE

Visible minorities account for a significantly higher proportion of the resident population for the City of New Westminster (43%) relative to the province (33%). This includes significant populations identifying as Chinese (11%), South Asian (10%), and Filipino (8%) among many others. Within the city, the greatest concentrations of visible minority populations are found in Queensborough (73%), Downtown (45%) and the West End (44%) PTA areas. Visible minority proportions are significantly higher in the neighbouring secondary trade areas of SE Burnaby (74%), NW Surrey (61%) and Lougheed (59%). Diversity of cultural backgrounds tends to support a broader array of specialty foods and restaurant types, among other culturally-oriented businesses.

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Table 6-7 - Trade Area Visible Minority Profile

	DT PTA	%	12th St. PTA	%	West End PTA	%	Uptown PTA	%	6th & McBride PTA	%	Sapperton PTA	%	Queensborough PTA	%
Total visible minority population	5,202	44.9%	4,899	43.1%	2,092	44.1%	7,198	38.0%	4,326	33.6%	2,771	34.9%	8,017	72.8%
Chinese	1,934	16.7%	1,020	9.0%	452	9.5%	1,593	8.4%	1,255	9.8%	633	8.0%	1,776	16.1%
South Asian	526	4.5%	946	8.3%	849	17.9%	1,296	6.8%	811	6.3%	415	5.2%	3,562	32.3%
Black	293	2.5%	547	4.8%	69	1.5%	750	4.0%	277	2.2%	245	3.1%	223	2.0%
Filipino	732	6.3%	1,131	9.9%	484	10.2%	1,232	6.5%	594	4.6%	717	9.0%	1,473	13.4%
Latin American	351	3.0%	300	2.6%	79	1.7%	423	2.2%	204	1.6%	161	2.0%	162	1.5%
Southeast Asian	194	1.7%	144	1.3%	13	0.3%	188	1.0%	86	0.7%	142	1.8%	216	2.0%
Arab	106	0.9%	139	1.2%	16	0.3%	375	2.0%	74	0.6%	48	0.6%	113	1.0%
West Asian	188	1.6%	151	1.3%	52	1.1%	356	1.9%	214	1.7%	29	0.4%	21	0.2%
Korean	526	4.5%	115	1.0%	18	0.4%	381	2.0%	447	3.5%	86	1.1%	79	0.7%
Japanese	132	1.1%	148	1.3%	11	0.2%	214	1.1%	191	1.5%	129	1.6%	163	1.5%

	Lougheed STA	%	SE Burnaby STA	%	NW Surrey STA	%	New Westminster, BC	%	British Columbia	%
Total visible minority population	22,107	58.6%	34,403	73.8%	16,779	61.0%	35,295	43.2%	1,648,848	32.6%
Chinese	7,777	20.6%	13,290	28.5%	2,405	8.7%	8,870	10.9%	593,342	11.7%
South Asian	2,238	5.9%	6,938	14.9%	5,822	21.2%	8,503	10.4%	466,284	9.2%
Black	662	1.8%	1,786	3.8%	1,074	3.9%	2,491	3.0%	57,685	1.1%
Filipino	1,687	4.5%	3,965	8.5%	2,767	10.1%	6,469	7.9%	150,062	3.0%
Latin American	749	2.0%	1,364	2.9%	749	2.7%	1,731	2.1%	54,875	1.1%
Southeast Asian	451	1.2%	1,322	2.8%	1,588	5.8%	1,027	1.3%	63,944	1.3%
Arab	863	2.3%	563	1.2%	553	2.0%	905	1.1%	28,247	0.6%
West Asian	2,078	5.5%	1,808	3.9%	508	1.8%	1,045	1.3%	65,395	1.3%
Korean	4,185	11.1%	1,604	3.4%	392	1.4%	1,715	2.1%	65,360	1.3%
Japanese	415	1.1%	439	0.9%	95	0.3%	1,009	1.2%	41,408	0.8%
Visible minority, n.i.e.	236	0.6%	246	0.5%	366	1.3%	372	0.5%	13,234	0.3%
Multiple visible minorities	768	2.0%	1,075	2.3%	460	1.7%	1,158	1.4%	49,012	1.0%

*Source: Urban Systems trade areas, Environics data via Sitewise Pro. * 2021 estimates calculated by Environics data algorithms in advance of full 2021 Census data releases*

6.4.6 TRADE AREA TRAVEL TO WORK MODE PROFILE

The City of New Westminster's wealth of SkyTrain stations (5), given its modest scale and total population, coupled with supporting high frequency connecting transit routes (e.g., 106 along 6th Street) help to drive high rates of public transit usage for travel to work purposes. The latest Environics estimates for 2021 show public transit travel to work proportion of nearly 31% and a total non-private auto proportion of roughly 38%.

Table 6-8 - Trade Area Travel to Work Mode Profile

2021 Estimates Travel to Work	DT PTA		12th St. PTA		West End PTA		Uptown PTA		6th & McBride PTA		Sapperton PTA		Queensborough PTA	
		%		%		%		%		%		%		%
2021 Employed Population 15 Years or Over	5,813	%base	5,315	%base	2,013	%base	8,046	%base	5,363	%base	3,652	%base	4,859	%base
Car as driver	2,439	42.0%	2,997	56.4%	1,238	61.5%	4,257	52.9%	3,678	68.6%	2,063	56.5%	3,418	70.3%
Car as passenger	92	1.6%	215	4.1%	48	2.4%	275	3.4%	202	3.8%	121	3.3%	224	4.6%
Public transit	**2,749**	**47.3%**	**1,714**	**32.2%**	**606**	**30.1%**	**2,639**	**32.8%**	**1,034**	**19.3%**	**1,147**	**31.4%**	**992**	**20.4%**
Walked	**394**	**6.8%**	**237**	**4.5%**	**69**	**3.4%**	**682**	**8.5%**	**309**	**5.8%**	**262**	**7.2%**	**135**	**2.8%**
Bicycle	55	1.0%	83	1.6%	44	2.2%	93	1.2%	61	1.1%	21	0.6%	55	1.1%
Other Method	84	1.4%	68	1.3%	8	0.4%	100	1.2%	80	1.5%	38	1.0%	35	0.7%

2021 Estimates Travel to Work	Lougheed STA		SE Burnaby STA		NW Surrey STA		New Westminster, BC		British Columbia	
		%		%		%		%		%
2021 Employed Population 15 Years or Over	15,580	%base	18,558	%base	11,689	%base	36,498	%base	2,035,641	%base
Car as driver	8,983	57.7%	10,607	57.2%	6,819	58.3%	21,049	57.7%	1,432,138	70.4%
Car as passenger	596	3.8%	876	4.7%	663	5.7%	1,230	3.4%	111,107	5.5%
Public transit	**4,861**	**31.2%**	**6,064**	**32.7%**	**3,624**	**31.0%**	**11,241**	**30.8%**	**267,440**	**13.1%**
Walked	**761**	**4.9%**	**594**	**3.2%**	**380**	**3.3%**	**2,122**	**5.8%**	**137,146**	**6.7%**
Bicycle	190	1.2%	211	1.1%	74	0.6%	418	1.1%	52,842	2.6%
Other Method	189	1.2%	206	1.1%	128	1.1%	438	1.2%	34,968	1.7%

*Source: Urban Systems trade areas, Environics data via Sitewise Pro. * 2021 estimates calculated by Environics data algorithms in advance of full 2021 Census data releases*

Public transit travel to work proportions are naturally highest in those areas with the greatest levels of service, namely Downtown (47%), Uptown (33%), 12th Street (32%), Sapperton (31%) and the West End (30%).

Estimated walk to work proportions are highest in Uptown (9%), followed by Sapperton (7%), and Downtown (7%). These areas also contain the highest concentrations of employment uses.

6.4.7 TRADE AREA HOUSEHOLD AND PER CAPITA INCOME PROFILE

Household and per capita income levels tend to drive retail spending, with higher incomes tending to drive relative increases in particular on discretionary retail categories, including automobile sales, household furniture, and home electronics, among others. The highest average household incomes in New Westminster are in the West End and Queensborough PTA areas, followed by the 6th & McBride and Sapperton PTA areas. On a per capita basis, the highest average incomes are found in the Downtown, 6th & McBride and Sapperton areas.

These income data, alongside key population and demographic characteristics, are key inputs in Urban Systems' retail demand modeling.

Table 6-9 - Trade Area Household and Per Capita Income Profile

	DT PTA	%	12th St. PTA	%	West End PTA	%	Uptown PTA	%	6th & McBride PTA	%	Sapperton PTA	%	Queensborough PTA	%
2021 Households by Income (Current Year $)	**6,000**	%base	**4,874**	%base	**1,529**	%base	**9,365**	%base	**5,589**	%base	**3,164**	%base	**3,360**	%base
Under $20,000	279	4.7%	209	4.3%	44	2.9%	525	5.6%	196	3.5%	100	3.1%	56	1.7%
$ 20,000 - $39,999	1,110	18.5%	992	20.4%	198	12.9%	2,438	26.0%	877	15.7%	492	15.5%	312	9.3%
$ 40,000 - $59,999	911	15.2%	776	15.9%	162	10.6%	1,667	17.8%	712	12.7%	431	13.6%	294	8.8%
$ 60,000 - $79,999	905	15.1%	678	13.9%	153	10.0%	1,282	13.7%	699	12.5%	405	12.8%	333	9.9%
$ 80,000 - $99,999	814	13.6%	575	11.8%	152	9.9%	957	10.2%	665	11.9%	344	10.9%	365	10.9%
$ 100,000 and over	1,981	33.0%	1,644	33.7%	821	53.7%	2,497	26.7%	2,439	43.6%	1,393	44.0%	2,000	59.5%
$ 100,000 - $ 124,999	693	11.6%	499	10.2%	173	11.3%	776	8.3%	665	11.9%	322	10.2%	466	13.9%
$ 125,000 - $ 149,999	469	7.8%	362	7.4%	142	9.3%	556	5.9%	530	9.5%	289	9.1%	435	13.0%
$ 150,000 - $199,999	395	6.6%	346	7.1%	192	12.6%	464	5.0%	516	9.2%	335	10.6%	520	15.5%
$ 200,000 and over	424	7.1%	436	9.0%	314	20.5%	700	7.5%	728	13.0%	447	14.1%	579	17.2%
Average household income	$ 91,606		$ 94,254		$ 132,342		$ 85,894		$ 111,162		$ 111,991		$ 128,794	
Average per capita income	$ 47,464		$ 40,452		$ 42,691		$ 42,522		$ 48,331		$ 44,618		$ 39,266	
Median household Income	$ 75,463		$ 73,559		$ 108,104		$ 60,825		$ 89,310		$ 89,010		$ 117,184	

	Lougheed STA	%	SE Burnaby STA	%	NW Surrey STA	%	New Westminster, BC	%	British Columbia	%
2021 Households by Income (Current Year $)	15,619	%base	17,277	%base	10,380	%base	35,558	%base	2,018,734	%base
Under $20,000	835	5.3%	933	5.4%	505	4.9%	1,441	4.1%	74,966	3.7%
$ 20,000 - $39,999	3,450	22.1%	3,423	19.8%	2,180	21.0%	6,622	18.6%	348,647	17.3%
$ 40,000 - $59,999	2,376	15.2%	2,312	13.4%	1,678	16.2%	5,166	14.5%	268,557	13.3%
$ 60,000 - $79,999	2,034	13.0%	2,102	12.2%	1,527	14.7%	4,692	13.2%	244,256	12.1%
$ 80,000 - $99,999	1,745	11.2%	1,904	11.0%	1,301	12.5%	4,112	11.6%	219,956	10.9%
$ 100,000 and over	5,178	33.2%	6,603	38.2%	3,189	30.7%	13,525	38.0%	862,352	42.7%
$ 100,000 - $ 124,999	1,590	10.2%	1,794	10.4%	1,128	10.9%	3,836	10.8%	215,131	10.7%
$ 125,000 - $ 149,999	1,210	7.7%	1,471	8.5%	771	7.4%	2,966	8.3%	179,205	8.9%
$ 150,000 - $199,999	1,089	7.0%	1,483	8.6%	685	6.6%	2,932	8.2%	192,750	9.5%
$ 200,000 and over	1,289	8.3%	1,855	10.7%	605	5.8%	3,791	10.7%	275,266	13.6%
Average household income	$ 92,058		$ 100,175		$ 85,375		$ 101,376		$ 113,575	
Average per capita income	$ 38,198		$ 37,102		$ 32,217		$ 44,077		$ 45,430	
Median household Income	$ 71,286		$ 78,751		$ 70,830		$ 79,395		$ 86,632	

Source

7.0 RETAIL COMMERCIAL DEMAND ANALYSIS

Following the rationalization of multiple trade areas (above), here we turn to projections of future retail demand by sub-area.

7.1 KEY COMPONENTS – RETAIL DEMAND ANALYSIS

Retail demand analysis for the City of New Westminster included the following components:

- **Inputting Key Outputs from the Retail Trade Area Analysis**: Urban Systems' retail demand model runs on historical retail trade spending data sourced from Statistics Canada and leverages key inputs for customized trade areas to assess local annual spending potential. Key inputs from the New Westminster Retail Trade Area Analysis include population growth by area as well as average household size and both household and per capita spending.

- **Assessing Realistic Market Capture**: Determining achievable market capture rates by commercial area necessitates an understanding of the limits of local (PTA) and regional (STA) spending support. Given that residents of New Westminster will tend to spend their disposable income at businesses throughout the city and beyond, total market capture rates by category (across all local trade areas) must, for example, allow for realistic outflow spending to other neighbouring jurisdictions.

- **Retail Demand Analysis by Major Commercial Area**: Quantify local retail spending potential (annual dollars) by retail-commercial category and area, leveraging the retail demand model's trade-area-specific inputs. Following determination of annual local spending potential, these realistic expenditure volumes are then converted into market-supportable floor area (sq. ft.) by category using category-specific sales per sq. ft. productivity estimates.

- **Evaluation of Demand vs. Supply by Major Commercial Area**: Compare market-supportable retail-commercial floor area by category to the inaugural retail-commercial inventory (supply by category) to determine potential areas of over or under-supply. This evaluation is a critical step in assessing gaps and opportunities that can be used to support each area's natural evolution.

Anvil Centre – Downtown New Westminster

7.2 POPULATION GROWTH BY TRADE AREA

While per capita spending levels by category certainly vary by trade area and income level, population and related growth by trade area is a critical model input. Historical population growth trends, coupled with Environics population forecasts were leveraged to determine the following population projection estimates for the City of New Westminster's defined trade areas:

Table 7-1 - Trade Area Population Growth Estimates

Retail Trade Area	Census	Estimate	Projected		
	2016	2021	2026	2031	2021-31 AAGR%
Downtown PTA	9,913	11,133	12,077	12,452	1.1%
12th Street PTA	10,461	12,314	14,124	16,110	2.7%
West End PTA	4,378	4,784	5,082	5,038	0.5%
Uptown PTA	17,689	19,407	20,355	20,059	0.3%
6th & McBride PTA	11,944	13,062	14,037	14,187	0.8%
Sapperton PTA	7,469	8,426	9,281	9,975	1.7%
Queensborough PTA	9,277	10,080	10,708	10,563	0.5%
PTA Sub-Total	*71,131*	*79,208*	*85,664*	*88,384*	*1.1%*
Lougheed STA	34,972	41,612	44,586	43,663	0.6%
Burnaby STA	46,289	49,836	51,483	53,081	0.9%
Surrey STA	26,995	27,675	28,950	30,417	0.9%
STA Sub-Total	*108,256*	*119,123*	*125,019*	*127,161*	*0.7%*
Trade Area Totals	**179,387**	**198,331**	**210,683**	**215,545**	**0.8%**

Source: Urban Systems trade area delineations, Environics Analytics population estimates and projections

As actual growth rates can differ from projections, it is recommended that these projected trade area population figures be assessed periodically to estimated impact on retail expenditures and related floor area support. This would allow for updates after, for example, redevelopment activity leading to higher densities in existing, built-out areas of the city.
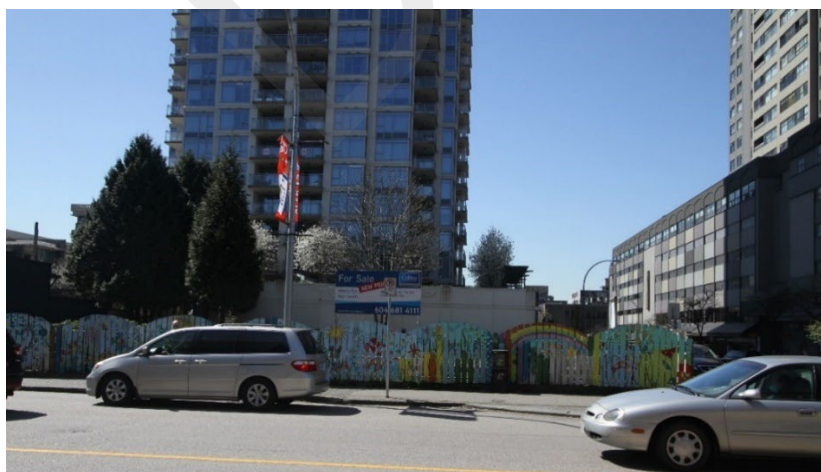
Mixed-Use High-Density Development Site – Uptown, just south of 6th and Belmont Streets

7.3   TRADE AREA EXPENDITURE POTENTIAL BY CATEGORY

For each of New Westminster's retail-commercial areas, expenditure forecasts by category were modeled, leveraging current and future population data and per capita spending estimates by category derived from retail trade data (published by Statistics Canada) and local-area adjustments for demographics and incomes. Given the number of key commercial areas and the extent of both primary (local PTA) and secondary (STA) trade areas, the total annual expenditure potential by retail category for an illustrative trade area is shown in the table below over a ten-year period.

Table 7-2 - Annual Retail Expenditure Potential by Category (Downtown PTA Residents)

Downtown New Westminster Residents	Annual Expenditure Potential		
Retail Spending Category	**2021**	**2026**	**2031**
Furniture and home furnishings stores	$ 5,637,000	$ 6,181,000	$ 6,435,000
Electronics and appliances	$ 5,185,000	$ 5,401,000	$ 5,356,000
Building materials, garden equipment, supplies	$ 9,800,000	$ 10,882,000	$ 11,455,000
Supermarkets and Other Grocery	$ 27,303,000	$ 29,757,000	$ 30,810,000
Convenience Stores	$ 1,527,000	$ 1,717,000	$ 1,827,000
Specialty Food Stores	$ 2,464,000	$ 2,802,000	$ 3,011,000
Liquor stores	$ 9,540,000	$ 10,783,000	$ 11,525,000
Clothing Stores	$ 8,597,000	$ 9,686,000	$ 10,300,000
Shoe Stores	$ 1,120,000	$ 1,240,000	$ 1,299,000
Jewellery, Luggage, Leather Goods Stores	$ 1,338,000	$ 1,544,000	$ 1,678,000
Sporting goods, hobby, book, and music stores	$ 4,127,000	$ 4,370,000	$ 4,394,000
General merchandise stores	$ 19,075,000	$ 21,304,000	$ 22,539,000
Miscellaneous store retailers	$ 4,771,000	$ 5,291,000	$ 5,564,000
Motor vehicle sales	$ 36,455,000	$ 41,350,000	$ 44,326,000
Auto parts, accessories, tires	$ 3,628,000	$ 4,149,000	$ 4,478,000
Health and personal care	$ 11,932,000	$ 13,426,000	$ 14,265,000
Retail trade - All categories	**$171,606,000**	**$191,187,000**	**$201,766,000**

Source: Urban Systems trade area delineation, retail demand potential modeling for Downtown PTA resident population

These figures represent the total annual spending potential of Downtown PTA residents over the 2021 to 2031 period. Given the City of New Westminster's position at the heart of Metro Vancouver, connected – via road and SkyTrain – to other significant jurisdictions and retail markets to the west, north and southeast, much of this potential will continue to flow out of the community. This outflow to larger shopping centres and clusters will likely continue as these competitive clusters feature mixes of retailers not present (or supportable) in the local New Westminster market. Illustrative examples of competitive retail centres and nodes that will continue to attract spending from New Westminster residents include:

- Metrotown / Metropolis in Burnaby
- United Boulevard area home improvement cluster (Coquitlam)
- Lougheed Town Centre (Burnaby)
- Coquitlam Centre (Coquitlam)
- Pacific Centre (Vancouver)
- McArthurGlen Designer Outlets (YVR)
- Pacific Centre and Robson Street (Vancouver)

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7.4 TRADE AREA MARKET CAPTURE

It is important that total market capture rates within City of New Westminster retail areas reflect both the realities of high-quality competitive retail clusters beyond its borders, as well as the extent to which New West retail areas offer compelling current business mixes and can accommodate enriched and expanded retail, entertainment, restaurant and service offerings.

For each retail category, key competitive businesses in each local primary trade area were identified to help establish reasonable estimates of market share by New West area and associated outflow spending beyond city boundaries. For illustrative purposes, Downtown PTA resident market shares by New Westminster commercial area have been presented for a number of key categories, including a list of representative businesses in each city area.

Table 7-3 - Market Capture of Downtown PTA Spending in Clothing and Accessories (By Commercial Area)

Clothing and Accessories	Key Businesses by New Westminster Area	DT PTA
New Westminster Retail Area		
Uptown	Winners, Mulberry Fashions, Northern Reflections, Treasure Chest Thrift	10%
Downtown	Good Omen, Mila + Paige, Bella Sposa Evening Wear, Sposa Wedding World, Lisa's Bridal, Sew Sweet Rose Bridal, Debonair Formal Wear, The Bridal Gallery, TBG Prom, Atelier Endeavour, Found Boutique, Bigfoot Industrial Supply, Maison Dasorine, Nuvon's Bridal & Formal Wear, Annemar Apaprel & Linens, Found	10%
Sapperton	Sweet Legs, Everything J&J Consignment (more misc. retail)	1%
Queensborough	Suzy Shier, La Vie en Rose, Helly Hansen, SoftMoc, Gap Factory, Banana Republic Factory, Tommy Hilfiger, Old Navy Outlet, Guess Factory, American Eagle Outlet	15%
6th & McBride	n/a	0%
12th Street	What's Good Vintage Apparel, Fringe Fashions (miscellaneous)	2%
West End	n/a	0%
Total Market Capture - City of New West Areas		**38%**
Estimated New West Retail Outflow		**62%**

Source: Urban Systems competitive review and market share estimates.

While Uptown, Downtown and Sapperton combined offer trade area residents a modest mix of fashion and clothing retailers, the extent and range of local supply pales in comparison to competitive offerings in major shopping centres and nodes in neighbouring Burnaby (e.g. Metrotown, Brentwood and Lougheed) and Vancouver (e.g. Pacific Centre, Robson Street). Spending outflow in this category for the Downtown PTA (outside New Westminster) is likely 65% or more but has been modeled at 62% to allow for modest recapture in specialty clothing.

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Spending outflow from the City of New Westminster is far more modest in the General Merchandise category, as local offerings cover a wide array of discount department store and dollar store retailers making up this category. As noted in the table below, outflow has been modeled at only 23%, with local New Westminster retailers capturing 77% of Downtown PTA resident spending in this category. This more limited outflow spending is flowing to general merchandise stores – including department (e.g. The Bay, Nordstrom) and discount department stores (e.g. Walmart, Marshalls) – in other jurisdictions.

Table 7-4 - Market Capture of DT PTA Spending - General Merchandise (By Commercial Area)

General Merchandise	Key Businesses in Category	DT PTA
New Westminster Retail Area		
Uptown	Walmart, Dollarama, My Uptown Party Store, Golden Coins Home & Garden, Super Bargain Plus, London Drugs	40%
Downtown	Dollar Tree, Your Dollar Store With More	15%
Sapperton	Dollar Mart	2%
Queensborough	Walmart Supercentre	20%
6th & McBride	Loonie Plus, Only Deals	0%
12th Street	n/a	0%
West End	n/a	0%
New West Based Market Capture by Area		77%
Estimated New West Outflow by Area		23%

Source: Urban Systems competitive review and market share estimates.

New Westminster is well-served in this category, as it offers not only a more urban-scaled Walmart in a walkable Uptown location in Royal City Centre, but also a larger Walmart supermarket as an anchor to the open-format Queensborough Landing.

Walmart Locations – Royal City Centre (Uptown) and Queensborough Landing (Queensborough)

Table 7-5 - Market Capture of Downtown PTA Spending - Specialty Foods (By Commercial Area)

Specialty Foods	Key Businesses by New Westminster Area	DT PTA
New Westminster Retail Area		
Uptown	Galloway's Fine Food Specialties, Sol Sweets, Solodko Ukrainian Bakery, Pink Ribbon Bakery, Full Basket Butchery, Purdy's Chocolatier, 6 Avenue Bread & Deli	10%
Downtown	Pamola Bakery & Deli, Candy Alley, Origins Chocolate Bar, Erin Purdey Cakes	15%
Sapperton	Fratelli Bakery, Holland Shopping Centre	5%
Queensborough	Take the Cake Patisserie, Epic Grill Silogs	2%
6th & McBride	M&M Meats, Queen's Meat and Deli	2%
12th Street (particularly strong mix)	Gospa Delightful Food, AL-An'am Halal Meat & Food, BC Market, Caribbean Market, Manila BBQ SuperMart, Machi African Store	5%
West End	n/a	0%
Total Market Capture - City of New West Areas		**39%**
Estimated New West Retail Outflow		**61%**

Source: Urban Systems competitive review and market share estimates.

Given New Westminster's growing population, diverse population base, and the high diversity of adjacent communities and neighbourhoods in northwest Surrey, southwest Coquitlam and southeast Burnaby, it is particularly well positioned to further develop its specialty foods offerings. Though there are fine examples of specialty food retailers across most New Westminster retail areas, outflow to areas outside the city has been modeled at a relatively high 60%, to reflect the extent of businesses and clusters located in other cities and neighbourhoods in Metro Vancouver.

Auxi Foods (Queensborough)

BC Market – Arabic Foods (12th Street)

Retail food – namely supermarkets and other grocery stores – is another critical category for any retail trade area, regardless of the extent of its geographic reach. Though the City of New Westminster does

not include a full array of destination-oriented supermarket offerings, with notable exceptions including Costco and Real Canadian Superstore, it does offer a wide range of options of more traditionally scaled supermarkets, including Save-On-Foods and Safeway, as well as large grocery departments in several Walmart locations. Along with a wide array of smaller lifestyle convenience-scaled grocery offerings, it is reasonable to model demand assuming continued outflow of about 20%.

Table 7-6 - Market Capture of Downtown PTA Spending - Supermarkets/Grocery (By Commercial Area)

Supermarkets and Other Grocery	Key Businesses by New Westminster Area	DT PTA
New Westminster Retail Area		
Uptown	Walmart, Save-On-Foods, Kin's Farm Market, 7-11, Arnie's Grocery, Joy Farm Market	15%
Downtown	Safeway, City Avenue Market, Save-On-Foods	35%
Sapperton	Save-On-Foods, Royal Farm Market	15%
Queensborough	Walmart Supercentre, Queensborough Market, Chinoys Supermarket	10%
6th & McBride	Safeway, Freshico Produce, Victoria Hill Market	5%
12th Street	BC Market, Caribbean Market, Manila BBQ SuperMart, Machi African Store	0%
West End	7-11	0%
Total Market Capture - City of New West Areas		**80%**
Estimated New West Retail Outflow		**20%**

Source: Urban Systems competitive review and market share estimates.

Some notable supermarket retailers currently absent from the local New Westminster retail market include Urban Fare, Thrifty Foods, Choices, NoFrills, and IGA. These current merchandising gaps would be particularly suitable candidates to consider for newer development or redevelopments likely to occur throughout the city.

Safeway (6th & McBride)
Downtown)

City Avenue Market (River Market,

7.5 QUANTIFYING NET RETAIL DEMAND (MARKET SUPPORT)

As noted above, market capture estimates for each New Westminster retail commercial area were evaluated based on a clear understanding of current offerings, and how local spending dollars are likely flowing to commercial areas throughout the city and beyond the city boundaries (outflow). Continuing to reference Downtown New Westminster to illustrate the key components of demand, the following table outlines the net annual expenditures that can reasonably be captured from Downtown PTA residents.

Table 7-7: Net Retail Expenditures by Category (Downtown PTA Residents in Downtown New Westminster)

Retail Category	Capture Rate	2021	2026	2031
Furniture and home furnishings stores	15%	$846,000	$927,000	$965,000
Electronics and appliances	5%	$259,000	$270,000	$268,000
Building materials, garden equipment, supplies	5%	$490,000	$544,000	$573,000
Supermarkets and Other Grocery	35%	$9.56M	$10.42M	$10.78M
Convenience Stores	40%	$611,000	$687,000	$731,000
Specialty Food Stores	15%	$370,000	$420,000	$452,000
Liquor stores	40%	$3.82M	$4.31M	$4.61M
Clothing Stores	10%	$860,000	$969,000	$1.03M
Shoe Stores	10%	$112,000	$124,000	$130,000
Jewellery, Luggage, Leather Goods Stores	10%	$134,000	$154,000	$168,000
Sporting goods, hobby, book, and music stores	10%	$413,000	$437,000	$439,000
General merchandise stores	15%	$2.86M	$3.20M	$3.38M
Miscellaneous store retailers	20%	$954,000	$1.06M	$1.11M
Health and personal care	30%	$3.58M	$4.03M	$4.28M
Food & Beverage[11]	30%	$10.96M	$12.50M	$13.54M
Total Annual Spending – DT PTA Residents (DT)		**$35.82M**	**$40.04M**	**$42.46M**

Source: Urban Systems retail demand modeling for Downtown New Westminster.

The above table summarizes only the extent to which Downtown PTA resident spending can reasonably be expected to flow to Downtown New Westminster commercial area businesses. Residents in each of New Westminster's other defined retail trade areas (PTAs) will also spend a portion of their annual disposable income at Downtown New Westminster businesses. This additional spending, which is derived from similar market capture analysis undertaken on an area-by-area basis, can then be added to the above figures to project reasonable estimates of total spending by category in the Downtown New Westminster commercial area[12].

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[11] As Restaurant Food & Beverage sales are not tracked within Statistics Canada-defined retail trade categories, household survey expenditures for restaurant food and alcohol served on licensed premises have been used to support spending estimates for defined trade areas.

[12] Detailed retail demand modeling outputs for all examined retail commercial areas in New Westminster are contained in separate retail demand models for each identified retail commercial area. As these models draw from a

This total annual net spending for the Downtown New Westminster commercial area is summarized in the table below.

Table 7-8 – Total Net Retail Expenditures by Category (All Trade Area Residents – PTAs and STAs)

Retail Category	2021	2026	2031
Furniture and home furnishings stores	$7.01M	$7.56M	$7.82M
Electronics and appliances	$1.59M	$1.64M	$1.63M
Building materials, garden equipment, supplies	$1.46M	$1.62M	$1.71M
Supermarkets and Other Grocery	$37.75M	$41.20M	$43.03M
Convenience Stores	$1.53M	$1.72M	$1.84M
Specialty Food Stores	$1.16M	$1.33M	$1.44M
Liquor stores	$12.44M	$13.97M	$14.93M
Clothing Stores	$4,189	$4.67M	$4.96M
Shoe Stores	$583,000	$636,000	$666,000
Jewellery, Luggage, Leather Goods Stores	$654,000	$751,000	$818,000
Sporting goods, hobby, book, and music stores	$3.84M	$4.01M	$4.03M
General merchandise stores	$8.14M	$9.068	$9.58M
Miscellaneous store retailers	$5.46M	$5.99	$6.30M
Health and personal care	$9.97M	$11.3M	$12.22M
Food & Beverage	$46.25M	$52.29M	$56.69M
Total Annual Spending (All PTAs and STAs in DT)	**$142.01M**	**$157.74M**	**$167.67M**

Source: Urban Systems retail demand modeling for Downtown New Westminster.

Given the results outlined in Table 16, Downtown resident spending accounts for approximately 25% of all spending in the Downtown commercial area. This is reasonable given the concentration of residents in higher density housing forms throughout the downtown and downtown's role as a shopping and service centre for Downtown New Westminster residents and daytime workers.

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consistent set of primary (PTA) and secondary (STA) trade areas, they can be updated over time to reflect changes in population, key demographics and more current retail trade spending data.

New Westminster Station / Plaza 88 (Downtown New Westminster)

Another key adjustment must be made to these projected Downtown commercial area spending estimates by category to account for spending by non-trade area residents. This inflow spending includes annual expenditures made by the following groups:

- Tourists and other visitors

- Daytime workers residing in areas beyond identified New Westminster trade areas (e.g. other areas of Metro Vancouver and the Fraser Valley)

- Shoppers traveling into New Westminster from other non-trade area locations

These inflow estimates are made by totaling all net trade area resident spending in a given area – in this review, Downtown New Westminster – and then estimating what proportion of total spending is likely being generated by groups such as those listed above, on a category-by-category basis. These inflow estimates – along with adjusted total spending estimates by category – are summarized in the table below for the Downtown New Westminster commercial area.

Table 7-9 - Total Downtown Commercial Area Retail Spending by Category (including inflow)

Retail Category	Inflow	2021	2026	2031
Furniture and home furnishings stores	20%	$8.76M	$9.45M	$9.78M
Electronics and appliances	10%	$1.77M	$1.82M	$1.81M
Building materials, garden equipment, supplies	5%	$1.54M	$1.,71M	$1.80M
Supermarkets and Other Grocery	10%	$41.94M	$45.78M	$47.81M
Convenience Stores	5%	$1.61M	$1.81M	$1.94M
Specialty Food Stores	20%	$1.45M	$1.66M	$1.80M
Liquor stores	10%	$13.82M	$15.52M	$16.59M
Clothing Stores	25%	$5.59M	$6.22M	$6.62M
Shoe Stores	25%	$778,000	$849,000	$888,000
Jewellery, Luggage, Leather Goods Stores	20%	$817,000	$939,000	$1.02M
Sporting goods, hobby, book, and music stores	15%	$4.52M	$4.72M	$4.74M
General merchandise stores	10%	$9.04M	$10.07M	$10.65M
Miscellaneous store retailers	15%	$6.42M	$7.04M	$7.42M
Health and personal care	5%	$10.50M	$11.90M	$12.86M
Food & Beverage	35%	$71.15M	$80.44M	$87.21M
Total Spending by Retail-Commercial Category		**$179.69M**	**$199.92M**	**$212.93M**

Source: Urban Systems retail demand modeling for Downtown New Westminster.

Based on the retail-commercial spending totals for Downtown New Westminster including inflow spending, Downtown PTA resident spending is likely to account for approximately 20% of all expenditures at Downtown New Westminster businesses. This is a reasonable proportion given both the extent of the Downtown population relative to the total trade area population and the City of New Westminster's geographic positioning at the heart of Metro Vancouver.

7.6   QUANTIFYING MARKET-SUPPORTABLE FLOOR AREA

With anticipated annual total spending by category now quantified, it is possible to reasonably estimate market support for related floor area by applying category-specific and market-appropriate sales per sq. ft. target rates for businesses. Sales per sq. ft. productivity rates for Metro Vancouver shopping centres, as tracked by ICSC, serve as a good proxy for new-build commercial space requirements in this market, however it is important to recognize, and make adjustments for, commercial space in older buildings and clusters that are not managed and tracked in the same way that a major shopping centre tends to be.

A given amount of sales dollars in a given market will therefore tend to support a smaller amount of newer commercial space relative to older commercial space. It is therefore important to allow for this when applying sales per sq. ft. productivity estimates for a commercial area like Downtown New Westminster, which contains a mix of older and newer space.

To estimate the extent of market-supportable retail-commercial floor area by category for Downtown New Westminster, the following table of sales per sq. ft. productivity rates was applied to the net sales projections summarized in Table 18 above.

Table 7-10 - Blended Average Sales Productivity Rates by Category (Downtown New Westminster)

Trade Area Retail Sales Productivity ($/sq. ft.) Estimates						
Retail Commercial Category	High-Productivity / New	Medium Adjustment	Low Adjustment	Medium Productivity	Low / Medium Productivity	Low Productivity
Furniture and home furnishings stores	$ 449	75%	60%	$ 337	$ 303	$ 269
Electronics and appliances	$ 1,812	75%	60%	$ 1,359	$ 1,223	$ 1,087
Building materials, garden equipment, supplies	$ 400	75%	60%	$ 300	$ 270	$ 240
Supermarkets and Other Grocery	$ 700	80%	60%	$ 560	$ 490	$ 420
Convenience Stores	$ 700	80%	60%	$ 560	$ 490	$ 420
Specialty Food Stores	$ 1,137	80%	60%	$ 910	$ 796	$ 682
Liquor stores	$ 800	85%	60%	$ 680	$ 580	$ 480
Clothing Stores	$ 518	75%	60%	$ 389	$ 350	$ 311
Shoe Stores	$ 549	75%	60%	$ 412	$ 371	$ 329
Jewellery, Luggage, Leather Goods Stores	$ 878	65%	60%	$ 571	$ 549	$ 527
Sporting goods, hobby, book, and music stores	$ 600	80%	60%	$ 480	$ 420	$ 360
General merchandise stores	$ 358	75%	60%	$ 269	$ 242	$ 215
Miscellaneous store retailers	$ 430	70%	60%	$ 301	$ 280	$ 258
Auto parts, accessories, tires	$ 350	80%	60%	$ 280	$ 245	$ 210
Health and personal care	$ 762	85%	60%	$ 648	$ 552	$ 457
Food & Beverage	$ 836	75%	60%	$ 627	$ 564	$ 502

Source: International Council of Shopping Centres, adjusted Urban Systems estimates for local market

Older Commercial Space (Columbia) vs. Newer Commercial Space (off Columbia)

Applying these sales productivity rates to projected net sales volumes by category for Downtown New Westminster generates the following market-supportable floor area estimates:

Table 7-11 - Market Supportable Retail-Commercial Floor Area (Downtown New Westminster)

DOWNTOWN RETAIL COMMERCIAL CATEGORY	2021	2026	2031
Furniture and home furnishings stores	28,100	29,500	29,800
Electronics and appliances	1,400	1,400	1,400
Building materials, garden equipment, supplies	5,500	6,000	6,200
Supermarkets and Other Grocery	83,100	88,400	90,100
Convenience Stores	3,200	3,500	3,600
Specialty Food Stores	1,800	2,000	2,100
Liquor stores	23,100	25,300	26,400
Clothing Stores	15,500	16,800	17,500
Shoe Stores	2,000	2,200	2,200
Jewellery, Luggage, Leather Goods Stores	1,500	1,600	1,700
Sporting goods, hobby, book, and music stores	10,400	10,600	10,400
General merchandise stores	36,300	39,400	40,700
Miscellaneous store retailers	22,300	23,800	24,500
Health and personal care	18,400	20,400	21,600
Restaurant Food & Beverage	122,400	134,900	142,700
Total	375,000	406,000	420,700
Service Commercial Requirement*	337,500	365,400	378,700
Grand Total	**712,000**	**771,000**	**799,000**

Source: Urban Systems retail demand modeling for Downtown New Westminster.

Columbia Street Commercial Businesses and Streetscapes (Various)

7.7   COMMERCIAL SUPPLY VS. DEMAND

7.7.1 DOWNTOWN

With market-supportable floor area now quantified, it is useful to compare warranted demand-side to the actual retail-commercial inventory figures surveyed and summarized earlier in this report, as noted in Table 8-13.

Table 7-12 – Current Supply vs. Market Support (Downtown Retail-Commercial Area)

Category	Inventory (2021) (sq.ft.)	Market Support – 2021 (sq.ft.)	Market Support – 2031 (sq.ft.)
Comparison Retail	115,000	123,000	134,000
Convenience Retail	130,000	130,000	143,000
Food & Beverage**	132,000	122,000	143,000
Service Commercial / Local Office	410,000	375,000	420,000
Vacant	85,000	n/a	n/a
TOTALS	874,000*	750,000*	841,000*

Source: Urban Systems retail-commercial inventory, projected retail-commercial demand

As outlined above, the extent of current vacancy (85,000 sq. ft. or nearly 10%) indicates moderate over-supply conditions in the current market. Net of this estimated vacant area, the inventory total in the above categories is 789,000 sq. ft. which is nearer to market-supportable levels over the short term. That being said, continued growth in Downtown New Westminster's resident population (e.g., Bosa's riverfront housing development) will help to drive support for additional local-serving goods and service-based businesses. As Downtown New Westminster is also a regional service centre for a broad array of services (health, financial, professional, personal), service commercial / local office levels are likely to be driven by demand for office uses[13].

Downtown New Westminster can certainly be said to be in transition. The large former Army & Navy Space, which once anchored the northeast end of Columbia Street, is currently occupied with an institutional / educational use. There are also ongoing challenges due to both construction and COVID-related shopper and staffing issues. Nevertheless, market fundamentals remain relatively strong and the trajectory for Downtown is positive. As the local resident and worker populations continue to grow, and as economic conditions and shopping patterns adjust to new post-pandemic realities, it is more likely that a realignment of the existing commercial mix to suit more local/community and arts/cultural/entertainment-driven uses and business types will be supported.

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[13] Office demand is a function of myriad of other factors and inputs unassociated with retail demand and would need to be assessed as part of a focused employment demand study.

7.7.2 UPTOWN RETAIL-COMMERCIAL DEMAND ANALYSIS

As discussed in the retail inventory analysis, New Westminster's Uptown commercial area is generally healthy from a commercial mix and vacancy perspective and has weathered the challenges of adapting to shifting market conditions – and the COVID-19 pandemic – better than most commercial areas. As a retail-commercial corridor, Uptown benefits from some key advantages:

- Frequent transit service connections to both New Westminster, 22nd Street, and Edmonds SkyTrain stations

- Walkability, flat topography

- Significant residential density – concentration of multi-family residential along 6th Street

- Well-appointed mixed-commercial shopping centres anchoring the mixed-use commercial streetscape (namely Royal City Centre and Westminster Centre) featuring anchor retailers with city-wide drawing power (Walmart, London Drugs)

Though Uptown – and other New Westminster – residents do tend to access shopping, restaurants and services beyond the city boundary of 10th Avenue, the area also naturally attracts spending dollars from southeast Burnaby residents (the SE Burnaby STA as noted in this report's trade area analysis section). Since the time of conducting Uptown's retail inventory, when vacant floor area was estimated at roughly 39,000 sq. ft., there has been some leasing activity, including the take-up of the former Rexall pharmacy with a branch of the Prospera Credit Union, which has reduced that vacancy to closer to 20,000 sq. ft.

Royal City Centre

Rocky Point Ice Cream
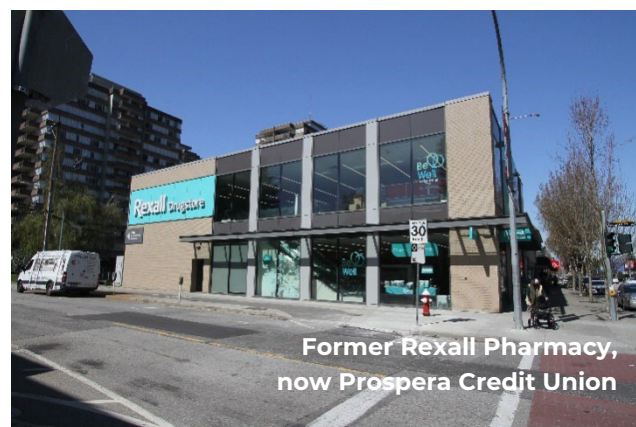
Former Rexall Pharmacy, now Prospera Credit Union

Table 7-13: Uptown Retail Commercial Market Support by Category

UPTOWN RETAIL COMMERCIAL CATEGORIES	2021	2026	2031
Furniture and home furnishings stores	2,341	2,496	2,541
Electronics and appliances	5,866	5,903	5,719
Building materials, garden equipment, supplies	5,803	6,139	6,084
Supermarkets and Other Grocery	84,675	89,105	90,088
Convenience Stores	3,155	3,402	3,506
Specialty Food Stores	2,998	3,280	3,424
Liquor stores	23,729	25,844	26,847
Clothing Stores	11,853	12,854	13,241
Shoe Stores	1,525	1,623	1,646
Sporting goods, hobby, book, and music stores	8,672	8,809	8,611
General merchandise stores	180,881	194,751	199,749
Miscellaneous store retailers	17,412	18,557	18,999
Health and personal care	31,837	34,355	35,347
Food & Beverage	89,008	97,509	102,230
Total Retail-Commercial support (rounded)	470,000	505,000	518,000
Service Commercial	235,000	252,000	259,017
Grand Total – Retail-Commercial Categories	705,000	757,000	777,000

Source: Urban Systems retail-commercial demand modeling for the Uptown commercial area

As shown above, Uptown's retail demand profile is indicative of a commercial area with a strong neighbourhood and community-serving, but more limited regional drawing power. Uptown does benefit from the presence of two significant shopping centres, namely Royal City Centre (376,000 sq. ft., built in 1992 and anchored by a 111,000 sq. ft. Walmart and 47,000 sq. ft. Save-On-Foods) and Westminster Centre (135,000 sq. ft., first built in 1978, anchored by a 35,00 sq. ft. London Drugs). As noted in Table 23, this cluster of internal shopping complexes, focused at 6th Street and 6th Avenue, includes a significant comparison retail category totaling roughly 189,000 sq. ft. (24% of commercial floor area).

Uptown – near 6th Avenue and 6th Street (various)

Uptown Retail-Commercial Supply vs. Demand

Table 23 presents a summary comparison of retail-commercial inventory in the Uptown commercial area[14], covering the comparison retail, convenience retail, restaurant food & beverage, service-commercial and vacant categories. Of the total estimated Uptown floor area of 778,000 sq. ft.:

- Comparison Retail accounts for roughly 24% of total floor area

- Convenience Retail uses comprise about 21% of the inventory

- Restaurant Food & Beverage businesses make up nearly 12% of the commercial area

- Service-Commercial / Local Office uses account for 38% of total commercial area (reflecting Uptown's dual role as an employment hub)

- Vacancy at about 5% (mid-2021), now estimated at closer to 4%

Table 7-14 – Current Supply vs. Market Support (Uptown Retail-Commercial Area)

Category	Inventory (2021) (sq.ft.)	Market Support – 2021 (sq.ft.)	Market Support – 2031 (sq.ft.)
Comparison Retail	189,000	234,000	257,000
Convenience Retail	162,000	146,000	159,000
Food & Beverage	91,000	89,000	102,000
Service Commercial / Local Office	297,000	235,000	259,000
Vacant	39,000	n/a	n/a
TOTALS	778,000*	705,000*	777,000*

Source: Urban Systems retail-commercial inventory, projected retail-commercial demand

Overall, market support for retail-commercial uses is estimated at about 700,000 sq. ft., which is certainly less than the inventory figure of 778,000 sq. ft., but roughly in balance across the comparison retail, convenience retail and restaurant food & beverage categories. While service-commercial floor area indicates modest over-supply, this is likely to improve over time, as the Uptown and New Westminster populations continue to grow.

Two categories with clear growth potential in the Uptown commercial area include Comparison Retail and Restaurant Food & Beverage. The former could be improved within both internal and street-front commercial buildings, while additional restaurant floorspace growth is most likely to be accommodated in new development or redevelopment projects.

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[14] Inventory conducted in summer-fall 2021, using ArcGIS FieldMaps and therefore subject to change over time. Totals do not include arts, culture and entertainment uses, demand for which is not quantified by retail modeling purposes.

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7.7.3 QUEENSBOROUGH RETAIL-COMMERCIAL DEMAND ANALYSIS

As outlined in this report's comprehensive retail-commercial inventory for Queensborough, this commercial area comprises a fairly modest mix of local-serving neighbourhood commercial uses alongside SmartCentres Queensborough Landing – a regional-serving open-format shopping first opened in 2002. As in the case of many power centres developed in the 1990s and early 2000s, Queensborough Landing has experienced some market-driven challenges over the past decade, which has been particularly noticeable in retail categories such as clothing, shoes, sporting goods and electronics.

These market-driven challenges include:

- Continued consumer spending shift from brick-and mortar retail to online shopping options, including both online-only platforms such as Amazon and the online platforms of large physical store retailers including Walmart (general merchandise) and clothing retailers such as the Gap and Old Navy

- Increased competitive pressures from new regional market entrants, such as Designer Outlet Vancouver Airport and Tsawwassen Mills, both of which feature extensive destination offerings in categories which have experienced significant decline at Queensborough Landing

- Increased competitive pressures due to expansions and tenant mix repositioning of existing major shopping centres throughout Metro Vancouver, including, for example, Guildford Town Centre in Surrey, the Burnaby SkyTrain-oriented shopping hubs at Metrotown, Brentwood and Lougheed, Coquitlam Centre, and Oakridge in Vancouver, among others

- Increased competitive pressure from other major retailers, in particular in the General Merchandise category. Once-popular "category killer" retailers in toys (Toys 'R Us), home electronics (Future Shop, now Best Buy), arts and crafts supplies (Michaels), home furnishings (Bed Bath & Beyond) and clothing (Le Chateau)

These increased competitive pressures have combined to limit the relative appeal of small to mid-size box-format retail shopping experiences such as those that drove the early success of open-format power centres throughout the 1990s and early 2000s. While many retailers at Queensborough Landing continue to draw significant spending dollars, these market-driven challenges have created historically high levels of retail unit and floor area vacancy, which suggest that the centre is in transition and likely to see an adjusted commercial mix.

Retail Vacancies at Queensborough Landing (various)

While Walmart continues to evolve its multi-channel retail platforms, which now include significant online platforms and both in-store and grocery pick-up options for customers, the surrounding commercial mix will likely have to continue to evolve beyond traditional retail categories to fill significant vacancies.

Walmart Supercentre at SmartCentres Queensborough Landing (132,000 sq. ft.)

Beyond Queensborough Landing's Walmart Supercentre, another nearby retailer with sufficient drawing power is Lowe's Home Improvement Warehouse, which competes directly with home improvement superstores Home Depot and RONA. For the larger Queensborough commercial area, which includes Queensborough Landing and neigbouring commercial uses, the two anchor categories likely to remain important drivers of demand are General Merchandise and Home Improvement.

Lowe's Home Improvement Warehouse (Queensborough Commercial Area)

Retail trade area demand analysis for the Queensborough commercial area as a whole is summarized below in Table 24.

Table 7-15 – Queensborough Retail-Commercial Market Support by Category

QUEENSBOROUGH RETAIL-COMMERCIAL CATEGORIES	2021	2026	2031
Furniture and home furnishings stores	8,737	9,231	9,307
Electronics and appliances	2,360	2,394	2,325
Building materials, garden equipment, supplies	109,181	116,765	118,878
Supermarkets and Other Grocery	50,592	53,238	53,322
Convenience Stores	1,148	1,249	1,291
Specialty Food Stores	1,041	1,150	1,207
Liquor stores	4,452	4,891	5,079
Clothing Stores	33,398	36,285	37,467
Shoe Stores	4,270	4,534	4,596
Sporting goods, hobby, book, and music stores	10,513	10,719	10,456
General merchandise stores	120,080	129,556	132,887
Miscellaneous store retailers	12,833	13,737	14,065
Health and personal care	6,062	6,638	6,824
Food & Beverage	51,085	56,068	58,982
Total Retail Commercial Support	**416,000**	**446,000**	**457,000**
Service Commercial (at 20% of above total)	83,000	89,000	91,000
Grand Total	**499,000**	**535,000**	**548,000**

Source: Urban Systems retail-commercial demand modeling for the Queensborough commercial area

As noted in the above summary, both home improvement (building supplies and garden equipment stores) and general merchandise are the area's natural anchor categories, with the supermarket and restaurant food & beverage categories also showing significant market demand for floor space. Market support for the clothing category, in contrast, is modest, particularly when compared to actual retail inventory (see Table 25).

Neighbourhood-Serving Restaurants and Convenience Retail (Queensborough street-front commercial)

Queensborough Retail-Commercial Supply vs. Demand

A comparison of Queensborough commercial area inventory vs. market support calculated from the retail demand modeling over the 2021 to 2031 period is shown in Table 25.

Table 7-16 – Current Supply vs. Market Support (Queensborough Retail-Commercial Area)

Category	Inventory (2021) (sq.ft.)	Market Support – 2021 (sq.ft.)	Market Support – 2031 (sq.ft.)
Comparison Retail	384,000	301,000	330,000
Convenience Retail	24,000	63,000	68,000
Food & Beverage	61,000	51,000	59,000
Service Commercial / Local Office	44,000	83,000	98,000
Vacant	79,000	n/a	n/a
TOTALS	591,000*	498,000*	548,000*

Source: Urban Systems retail-commercial inventory, projected retail-commercial demand

From these comparative figures, we can draw the following conclusions:

- **Comparison Retail** is generally over-supplied – The bulk of vacant commercial space in the Queensborough commercial area is former comparison retail space at Queensborough Landing. Between current inventory alone, this category is as much as 30% over-supplied. Given the quality of the location from a market perspective (surrounding residential density and accessibility), a pivot to other retail or commercial categories or uses is warranted and likely being actively explored by SmartCentres.

- **Convenience Retail** is generally under-supplied relative to potential market support calculations. The Queensborough community would benefit from additional convenience retail businesses to support day-to-day needs for essential goods.

- **Restaurant Food & Beverage** is only modestly oversupplied in the immediate term; however this should improve over time provided that increased population does not drive undue increases in restaurant floor area.

- **Service-Commercial and Local Office Uses –** Based on a modest estimated requirement of roughly 20% service-commercial to retail uses throughout the community, the Queensborough commercial area is deemed to be underserved in local services and local-serving office uses. While located relatively close to Downtown New Westminster, the area would benefit from growth in this category.

7.7.4 SAPPERTON RETAIL-COMMERCIAL DEMAND ANALYSIS

Sapperton is primarily a local-serving mixed-use commercial district serving the needs of both local area residents (a population concentration which is growing due to increased multi-family development activity) and local workers, particularly in the medical and health fields. The following

**Table 7-17 - Sapperton Retail-Commercial Market Support by Category**

SAPPERTON RETAIL-COMMERCIAL CATEGORIES	2021	2026	2031
Electronics and appliances	618	637	633
Supermarkets and Other Grocery	48,654	51,510	52,427
Convenience Stores	1,970	2,155	2,254
Specialty Food Stores	1,235	1,369	1,441
Liquor stores	6,080	6,672	6,971
Clothing Stores	2,739	3,016	3,156
Sporting goods, hobby, book, and music stores	3,917	3,983	3,892
General merchandise stores	11,821	12,888	13,406
Miscellaneous store retailers	5,066	5,476	5,662
Auto parts, accessories, tires	3,579	3,997	4,220
Health and personal care	17,684	19,381	20,116
Food & Beverage	37,231	40,845	42,908
Total Retail Commercial Support	**141,000**	**152,000**	**157,000**
Service Commercial	141,000	152,000	157,000
Grand Total	**281,000**	**304,000**	**314,000**

Source: Urban Systems retail-commercial demand modeling for the Sapperton commercial area

The most notable addition to Sapperton's Brewery District, a mixed-use development anchored by major employers TransLink and Coast Mountain Bus Company and supermarket Save-On-Foods.

Save-On-Foods Supermarket Anchor – Brewery District (Sapperton commercial area)

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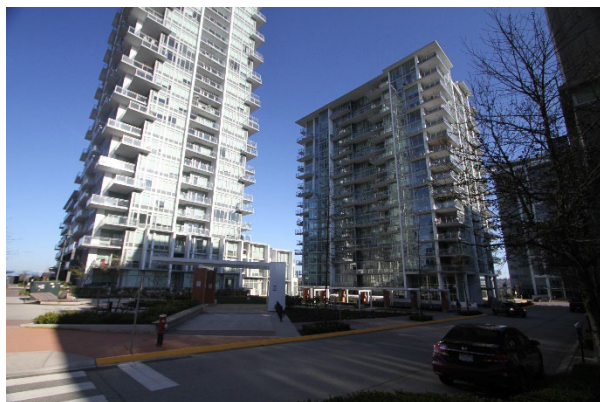
New Residential Towers (Brewery District)
(Brewery District)

Shoppers Drug Mart mini-anchor

Sapperton's area-wide vacancy is relatively low (3.5% of retail-commercial floor area as outlined in Table 27). This is in part due to the area's significant daytime employment population and the growing residential population moving into higher density multi-family apartments (e.g. Brewery District).

Sapperton area commercial vacancy

Health-oriented specialty services

From an employment perspective, the Sapperton commercial area is anchored by Royal Columbian Hospital, and this medical services hub generates support for a wide range of complementary businesses and service providers, including diagnostic labs, specialized clinics, and more generalized health and wellness services. This large concentration of daytime employment generates significant support for the following types of businesses:

- Coffee and tea shops
- Restaurant food and beverage
- Personal services
- Pharmacies
- Grocery
- Liquor stores

Sapperton Retail-Commercial Supply vs. Demand

A comparison of Sapperton's current inventory relative to quantified market support for 2021 to 2031 as calculated through retail demand modeling is summarized in Table 27.

Table 7-18 – Current Supply vs. Market Support (Sapperton Retail-Commercial Area)

Category	Inventory (2021) (sq.ft.)	Market Support – 2021 (sq.ft.)	Market Support – 2031 (sq.ft.)
Comparison Retail	41,000	28,000	33,000
Convenience Retail	61,000	76,000	83,000
Food & Beverage	41,000	37,000	43,000
Service Commercial / Local Office	158,000	141,000	157,000
Vacant	11,000	n/a	n/a
TOTALS	312,000*	281,000*	314,000*

Source: Urban Systems retail-commercial inventory, projected retail-commercial demand

As shown in summary table 7-18, while the area's estimated vacancy is within a reasonable range (3% to 4% of total retail-commercial space), there is a notable gap between current inventory and projected market support in the Comparison Retail category. Though the gap can be expected to narrow over time as the local resident and worker populations grow, there is likely to be a shift toward other, more lifestyle convenience and health-oriented categories over time.

Other listed categories are nearly in balance but would benefit from increased local employment and resident populations. Overall, current market support reflects a moderate imbalance in demand vs. current supply, though this can be expected to improve over the defined study period.

East Columbia looking toward Royal Columbian / Downtown (Sapperton)

7.7.5 12ᵀᴴ STREET RETAIL-COMMERCIAL DEMAND ANALYSIS

New Westminster's 12th Street commercial district is a mixed-use corridor that runs along 12th Street, ending at the 10th Avenue border with the City of Burnaby. As noted in Table 7-19 below, the 12th Street commercial node is well known among local New Westminster and other neighbouring residents for its array of specialty and convenience foods, and specialty restaurants (covering a broad array of cultural backgrounds).

As summarized in Table 7-19, retail demand modeling is showing market support for between 163,000 and 192,000 sq. ft. over the 2021 to 2031 study period. As shown in Table 7-20, current retail-commercial supply in the 12th Street commercial area exceeds estimated trade area market support by a significant margin.

Table 7-19 - 12th Street Retail-Commercial Market Support by Category

12th ST. RETAIL-COMMERCIAL CATEGORIES	2021	2026	2031
Electronics and appliances	958	981	965
Building materials, garden equipment, supplies	6,897	7,628	8,209
Supermarkets and Other Grocery	11,184	11,948	12,274
Convenience Stores	2,941	3,278	3,526
Specialty Food Stores	3,229	3,621	3,893
Liquor stores	4,350	4,786	5,008
Clothing Stores	2,902	3,202	3,368
Shoe Stores	374	405	419
Sporting goods, hobby, book, and music stores	3,960	4,117	4,117
Miscellaneous store retailers	9,826	10,651	11,065
Auto parts, accessories, tires	18,157	20,379	21,808
Health and personal care	6,437	7,213	7,793
Food & Beverage	37,467	41,905	45,327
Total 12th Street Retail-Commercial Support	**109,000**	**120,000**	**128,000**
Service Commercial	54,000	60,000	64,000
Grand Total	**163,000**	**180,000**	**192,000**

Source: Urban Systems retail-commercial demand modeling for the 12th Street commercial area

From a retail market perspective, the 12th Street commercial node's challenges include:

- Ease of connection to Kingsway in Burnaby and extensive competitive retail-commercial businesses across a wide array of categories

- Natural flow of local commercial spending activity toward both the Uptown and Downtown commercial areas

- Older commercial structures with vacancy not suitable for newer retail concepts – significant vacancy closest to 10th Avenue border with Burnaby (this block of commercial units has historically seen considerable turnover in its business mix)

- Currently limited residential density – the area would benefit from an increased array of higher-density multi-family housing options

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The 12th Street commercial area's strengths lie in its mix of specialty and convenience restaurants and specialty foods spanning a variety of cultures, as noted in the following series of photos.

This cluster of businesses reflects the diverse makeup of the local area population and attracts visitation and spending from across the City due to its unique offerings. Due to its positioning west of Uptown, north of Downtown, and south of Burnaby's Kingsway corridor (which also features a wide array of specialty restaurants among more recent generic chain offerings in new development just north of 12th Street and 10th Avenue), the 12th Street commercial area faces significant competitive pressures. It would benefit from both a focus on core categories of differentiation and on new infill multi-family residential development which can drive local area population growth.

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12th Street Retail-Commercial Supply vs. Demand

As noted below in Table 7-20, there is currently a general oversupply of commercial floorspace in the 12th Street commercial area relative to quantified market support over the 2021 to 2031 period.

Retail-commercial vacancy on 12th Street (various)

Table 7-19 - Current Supply vs. Market Support (12th Street Retail-Commercial Area)

Category	Inventory (2021) (sq.ft.)	Market Support – 2021 (sq.ft.)	Market Support – 2031 (sq.ft.)
Comparison Retail**	26,500	25,000	27,000
Convenience Retail	26,000	28,000	31,000
Food & Beverage	46,000	38,000	45,000
Service Commercial / Local Office	100,000	54,000	64,000
Vacant	24,000	n/a	n/a
TOTALS	224,000*	163,000*	192,000*

Source: Urban Systems retail-commercial inventory, projected retail-commercial demand

Potential keys to preserving the essential character and market viability of the 12th Street commercial node include the following:

- Increased higher-density residential infill to generate increased local population

- Retention of some older commercial space to support a broader array of

- Consideration, in newer development, for multi-family residential only or limited commercial CRU integration

- 22nd Street planning implications – ideally, a focus on hyper convenience, in order to drive business to existing commercial districts such as 12th Street. Competitive pressures are already significant and undue amounts of new commercial space at 22nd Street will only add to this pressure.

7.7.6 RETAIL CONSIDERATIONS FOR OTHER KEY COMMERCIAL AREAS

Important considerations for other notable clusters, both existing and planned are as follows:

- **6th and McBride area**: While focused primarily around the Safeway-anchored Royal Square Mall at 8th Avenue and McBride, this area is well-positioned for higher-density mixed-use infill development. Given the extent of existing commercial offerings at Royal Square, as well as in immediately surrounding neighbourhoods, this mixed-use redevelopment will likely result in a modest reduction in total commercial space, but a significant uplift in quality of space. This is particularly true for the older strip commercial centre located northeast of Royal Square across McBride.

Optimal mixed-use redevelopment site – 8th Avenue and McBride

- **Connaught Heights area**: New multi-family development is planned for the area around 22nd Street Station. The additional population resulting from this will be a positive influence on all of New Westminster's commercial areas and businesses, provided that planned commercial uses are focused only on hyper convenience services and limited food (i.e. coffee, convenience foods). Limiting the extent of new commercial in this area will help to support the ongoing health and viability of the 12th Street commercial area in particular.

APPENDIX A

SHOPPING CENTRE PROFILES

Detailed Report

Columbia Square Plaza

 1001 10 St.
New Westminster BC V3M 6H8

Intersection:	Columbia St. & Royal Ave.
Type:	Community
Year Opened:	1989

PHYSICAL ATTRIBUTES

Site Size:	
GLA (sq.ft.):	166,000
Enclosure:	open
Levels of Retail:	1
Total CRUs:	35
Food Court?	no
Mall has pad sites:	yes
Provides cart/kiosk?	no
Accepts temporary tenants?	
Parking Spaces:	450

CONTACTS

Leasing Manager:
Sanjay Sudra, Warrington PCI Management , 300-1030 West Georgia St. Vancouver BC V6E 2Y3 Ph:(604) 602-1887 Fx:(604) 688-2328

Property Management Company:
Warrington PCI Management 300-1030 West Georgia St. Vancouver BC V6E 2Y3 Ph:(604) 602-1887 Fx:(604) 688-2328

TENANT MIX

Apparel%	Food%	GM%	Home%	Leisure%	Service%	Non-Retail%
0.0	44.0	20.0	4.0	8.0	20.0	4.0

Ind%	Chain%	National Chain%
40.0	60.0	32

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%

Monday Retail IQ

0.0   6.7   33.3   6.7   0.0   53.3

ANCHOR TENANTS
[Save-On-Foods](#) - 20,431 sq.ft.

TENANTS by Name
Autoplan
[BC Liquor Stores](#) *8,082sf*, [BMO Bank of Montreal](#) *4,833sf*, [Bosley's by Pet Valu](#) *3,549sf*, [Boston Pizza](#) *6,385sf*, Burger Heaven, [Burger King](#) *3,798sf*
[Chronic Tacos](#) *1,597sf*, Cockney Kings Fish & Chips *2,100sf*, Columbia Square Animal Hospital *1,232sf*, Columbia Square Dental
[De Dutch Pannekoek House Restaurants](#) *2,597sf*
[Fabricland](#) *12,083sf*
Hayashi Sushi *1,200sf*
[Magicuts](#) *928sf*, Motion Physiotherapy *2,071sf*
New West Cleaners *650sf*, New West Crystal Nails *1,098sf*, New West Optometry Clinic *952sf*
[Pharmasave](#) *5,459sf*
[Starbucks](#) *1,629sf*, [Subway](#) *1,448sf*
[TD Canada Trust](#) *5,984sf*
[The UPS Store](#) *958sf*

TENANTS by Category

Food
Restaurant/QSR: [Boston Pizza](#) *6,385sf*, Burger Heaven, [Burger King](#) *3,798sf*, [Chronic Tacos](#) *1,597sf*, Cockney Kings Fish & Chips *2,100sf*, [De Dutch Pannekoek House Restaurants](#) *2,597sf*, Hayashi Sushi *1,200sf*, [Starbucks](#) *1,629sf*, [Subway](#) *1,448sf*
Specialty Food/Drink: [BC Liquor Stores](#) *8,082sf*

General Merchandise
Beauty/Personal Care: [Magicuts](#) *928sf*, New West Crystal Nails *1,098sf*
Drug/Health: [Pharmasave](#) *5,459sf*
Office Supplies: [The UPS Store](#) *958sf*
Optical: New West Optometry Clinic *952sf*

Home
Fabric/Sewing Access.: [Fabricland](#) *12,083sf*

Leisure
Pet: [Bosley's by Pet Valu](#) *3,549sf*, Columbia Square Animal Hospital *1,232sf*

Non-Retail
Non-Retail: Autoplan

Services
Dry Cleaner/Laundromat/Tailor: New West Cleaners *650sf*
Financial: [BMO Bank of Montreal](#) *4,833sf*, [TD Canada Trust](#) *5,984sf*
Medical/Dental: Columbia Square Dental, Motion Physiotherapy *2,071sf*

Monday Retail IQ

Detailed Report

River Market at Westminster Quay

810 Quayside Dr.
New Westminster BC V3M 6B9
www.rivermarket.ca

Intersection:	8 St. & Columbia St.
Type:	Regional
Year Opened:	1986

PHYSICAL ATTRIBUTES

Site Size:	
GLA (sq.ft.):	72,000
Enclosure:	enclosed
Levels of Retail:	2
Total CRUs:	30
Food Court?	yes, **seats:**
Mall has pad sites:	no
Provides cart/kiosk?	
Accepts temporary tenants?	
Parking Spaces:	

CONTACTS

Owner & Property Manager:

Take Root Properties Inc. 207-810 Quayside Dr. New Westminster BC V3M 6B9 Ph:(604) 800-1680 Fx:(604) 800-1685

TENANT MIX

Apparel%   Food%   GM%   Home%   Leisure%   Service%   Non-Retail%

Ind%   Chain%   National Chain%

Merchandise Price Category (for chains only)

Dis%   Low-Med%   Med%   Med-Upr%   Upper%   N.A.%

Detailed Report

Royal City Centre

610 6 St.
New Westminster BC V3L 3C2
www.royalcitycentre.ca

Intersection:	610 Ave. & 6 St.
Type:	Retail Mixed-Use
Year Opened:	1992

PHYSICAL ATTRIBUTES

Site Size:	
GLA (sq.ft.):	375,585
Enclosure:	enclosed
Levels of Retail:	2
Total CRUs:	50
Food Court?	yes, **seats:**
Mall has pad sites:	no
Provides cart/kiosk?	
Accepts temporary tenants?	
Parking Spaces:	1,365

TRAFFIC

People Traffic :	
Vehicle Traffic (per day) :	44,000

OWNERSHIP CHANGES

Year Last Sold:	2010
Previous Owner:	BC Retail Partners General Partnership

CONTACTS

Leasing Manager:
Petr Kafka, Strathallen Capital Corp. , 1001-2 Bloor St. W. Toronto   ON M4W 3E2   Ph:(416) 922-5553 Fx:(416) 922-6667

Owner & Property Manager:
Strathallen Capital Corp. 1001-2 Bloor St. W. Toronto ON M4W 3E2   Ph:(416) 922-5553 Fx:(416) 922-6667

TENANT MIX

Monday Retail IQ

Apparel%	Food%	GM%		Home%	Leisure%	Service%	Non-Retail%
10.7	21.4	12.5		0.0	19.6	21.4	14.3

Ind%	Chain%	National Chain%
51.8	48.2	23

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%
7.4	7.4	29.6	11.1	0.0	44.4

ANCHOR TENANTS

[Save-On-Foods](#) - 47,531 sq.ft.
[Walmart](#) - 111,532 sq.ft.

TENANTS by Name

[A & W](#) *362sf*, AJ Insurance Services Ltd. *5,302sf*, [Alive Health Centre](#) *950sf*, [Anytime Fitness](#) *5,421sf*

BC Lotto *100sf*, Belmont Dental Centre *2,477sf*, [Blenz Coffee](#) *250sf*, [BMO Bank of Montreal](#) *5,720sf*

Canadian Mental Health Association *2,786sf*, CEFA Early Learning *7,584sf*, CNIB Foundation *2,273sf*

[Dollarama](#) *10,837sf*, Dr. Eric Pugash *1,336sf*

Elicare Medical *2,334sf*, Everyday Items Japan *1,600sf*

[Fido](#) *150sf*, Fortune Wok *344sf*, Frasers Health Authority *37,597sf*, [Freedom Mobile](#) *150sf*, Fresh Sushi Roll *176sf*, [Freshslice](#) *1,075sf*, [FYidoctors](#) *4,585sf*

Genie Stitch *950sf*, Gourmet Cup *250sf*, Grace Shoe Repair *256sf*, Grill & More *361sf*

Harper & Associates *1,321sf*

Immigrant Services Society of BC *6,871sf*

[Kin's Farm Market](#) *3,241sf*, [Koodo Mobile](#) *120sf*

Label Express *1,498sf*

[The Mad Hatter's Superstore](#) *2,122sf*, Maritime Travel *812sf*, [Mobile Q](#) *160sf*, Mulberry Fashions *819sf*

New Westminster Family Practice *3,973sf*, [Northern Reflections](#) *1,327sf*

[Purdys Chocolatier](#) *800sf*

[RBC Royal Bank](#) *10,311sf*, [Rogers](#) *135sf*, Royal City Family Dental Centre *1,863sf*, Royal City Health & Manual Therapy *3,176sf*

[The Shoe Company](#) *3,685sf*, [Shoppers Drug Mart](#) *14,927sf*, [The Source](#) *1,700sf*

T & N Games *4,342sf*, [Telus](#) *1,225sf*

[Virgin Mobile](#) *150sf*, Vision Loss Rehabilitation Canada *2,272sf*, Visions Optical *1,766sf*

West Coast Medical Imaging *3,504sf*, Westland Insurance *947sf*, [White Spot Restaurant](#) *6,800sf*, [Winners](#) *7,159sf*

TENANTS by Category

Monday Retail IQ

Apparel
Family Wear: Winners *7,159sf*
Footwear: The Shoe Company *3,685sf*
Jewellery/Fashion Access.: The Mad Hatter's Superstore *2,122sf*
Ladies' Wear: Label Express *1,498sf*, Mulberry Fashions *819sf*, Northern Reflections *1,327sf*

Food
Grocery: Kin's Farm Market *3,241sf*
Restaurant/QSR: A & W *362sf*, Blenz Coffee *250sf*, Fortune Wok *344sf*, Fresh Sushi Roll *176sf*, Freshslice *1,075sf*, Gourmet Cup *250sf*, Grill & More *361sf*, White Spot Restaurant *6,800sf*
Specialty Food/Drink: Alive Health Centre *950sf*, Purdys Chocolatier *800sf*

General Merchandise
Drug/Health: Shoppers Drug Mart *14,927sf*
Mass Merchandise: Dollarama *10,837sf*, Everyday Items Japan *1,600sf*
Optical: FYidoctors *4,585sf*, Visions Optical *1,766sf*
Shoe Repair: Grace Shoe Repair *256sf*

Leisure
Electronics: The Source *1,700sf*
Fitness: Anytime Fitness *5,421sf*
Ticket/Lotto Sales: BC Lotto *100sf*
Toy/Games: T & N Games *4,342sf*
Wireless/Cable: Fido *150sf*, Freedom Mobile *150sf*, Koodo Mobile *120sf*, Mobile Q *160sf*, Rogers *135sf*, Telus *1,225sf*, Virgin Mobile *150sf*

Non-Retail
Non-Retail: AJ Insurance Services Ltd. *5,302sf*, Canadian Mental Health Association *2,786sf*, CEFA Early Learning *7,584sf*, CNIB Foundation *2,273sf*, Harper & Associates *1,321sf*, Immigrant Services Society of BC *6,871sf*, New Westminster Family Practice *3,973sf*, Westland Insurance *947sf*

Services
Dry Cleaner/Laundromat/Tailor: Genie Stitch *950sf*
Financial: BMO Bank of Montreal *5,720sf*, RBC Royal Bank *10,311sf*
Medical/Dental: Belmont Dental Centre *2,477sf*, Dr. Eric Pugash *1,336sf*, Elicare Medical *2,334sf*, Frasers Health Authority *37,597sf*, Royal City Family Dental Centre *1,863sf*, Royal City Health & Manual Therapy *3,176sf*, Vision Loss Rehabilitation Canada *2,272sf*, West Coast Medical Imaging *3,504sf*
Travel: Maritime Travel *812sf*

Detailed Report

Royal Square Mall

800 McBride Blvd.
New Westminster BC V5M 2B8

Intersection:	McBride Blvd. & 8 Ave.
Type:	Neighbourhood
Year Opened:	1959

PHYSICAL ATTRIBUTES

Site Size:	2.99 acres
GLA (sq.ft.):	61,373
Enclosure:	partially open
Levels of Retail:	1
Total CRUs:	
Food Court?	yes, **seats:** 60
Mall has pad sites:	no
Provides cart/kiosk?	no
Accepts temporary tenants?	
Parking Spaces:	304

OWNERSHIP CHANGES

Year Last Sold:	2010
Previous Owner:	Canada Safeway Limited. 2015 - Centre currently for sale by Colliers Vancouver.

CONTACTS

Leasing Manager:

Michael Anderson, Northern Vision Realty Advisors Inc. , 257 W. 28th St.   North Vancouver BC V7N 2H9   Ph:(604) 374-1171 Fx:(604) 926-1699

Owner:

R.S. Commercial Properties Ltd.   Ph: Fx:

TENANT MIX

Apparel%	Food%	GM%	Home%	Leisure%	Service%	Non-Retail%
0.0	56.3	6.3	6.3	0.0	18.8	12.5

Ind%	Chain%	National Chain%

Monday Retail IQ

50.0　　　　50.0　　　31

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%
0.0	0.0	37.5	12.5	0.0	50.0

ANCHOR TENANTS

BC Liquor Stores - 6,156 sq.ft.
Safeway (SHADOW ANCHOR) - 43,000 sq.ft.

TENANTS by Name

Autoplan
Booster Juice
Everything for a Dollar Store
General Paint *3,378sf*, Greater Vancouver Community Credit Union *2,514sf*
M&M Food Market *1,213sf*, Max Burgers, Money Mart
Pizza Hut *1,267sf*
Royal Square Dental Centre
Sally Beauty Supply, Starbucks *1,378sf*, Subway *1,096sf*
Willowbrae Academy *6,303sf*, Woomi Sushi

TENANTS by Category

Food
Convenience/Gas: Everything for a Dollar Store
Restaurant/QSR: Max Burgers, Pizza Hut *1,267sf*, Starbucks *1,378sf*, Subway *1,096sf*, Woomi Sushi
Specialty Food/Drink: Booster Juice, M&M Food Market *1,213sf*

General Merchandise
Beauty/Personal Care: Sally Beauty Supply

Home
Hardware/Paint: General Paint *3,378sf*

Non-Retail
Non-Retail: Autoplan, Willowbrae Academy *6,303sf*

Services
Financial: Greater Vancouver Community Credit Union *2,514sf*, Money Mart
Medical/Dental: Royal Square Dental Centre

Detailed Report

Shops at New West

800 Carnarvon St.
New Westminster BC V3M 0G3

Intersection:	8 St. & Columbia St.
Type:	
Year Opened:	2012

PHYSICAL ATTRIBUTES

Site Size:	
GLA (sq.ft.):	207,031
Enclosure:	enclosed
Levels of Retail:	3
Total CRUs:	25
Food Court?	no
Mall has pad sites:	no
Provides cart/kiosk?	no
Accepts temporary tenants?	
Parking Spaces:	423

CONTACTS

Leasing Manager:
Mina Smidstra, First Capital REIT , 110-888 Carnarvon St. New Westminster BC V3M 0C6
Ph:(604) 242-9045 Fx:(604) 278-3364
Leasing Manager:
Matt Gratton, First Capital REIT , 110-888 Carnarvon St. New Westminster BC V3M 0C6
Ph:(604) 242-9045 Fx:(604) 278-3364
Owner & Property Manager:
First Capital REIT 400-85 Hanna Ave. Toronto ON M6K 3S3 Ph:(416) 504-4114 Fx:

TENANT MIX

Apparel%	Food%	GM%	Home%	Leisure%	Service%	Non-Retail%
2.3	48.8	11.6	0.0	9.3	14.0	14.0

Ind%	Chain%	National Chain%
51.2	48.8	16

Monday Retail IQ

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%
9.5	4.8	4.8	4.8	0.0	76.2

ANCHOR TENANTS

Landmark Cinemas - 37,000 sq.ft.
Safeway - 39,403 sq.ft.

TENANTS by Name

A & H Steel, A & W, AKD Kitchen Soup & Goods, Aloha Plates
Bobacabana Bubble Tea
Candy Alley, CG Masters Academy *5,118sf*, Chicko Chicken, CIBC *4,698sf*
Dollar Tree *8,500sf*, Donair Dude, Dynamic Health & Fitness
Fido, First Capital Realty, Freedom Mobile, Freshslice
H&R Block, Hub Restaurant & Lounge
Kushimura Izakaya Japanese Restaurant
Launch Rehab, Limina Wellness Lounge & Spa
Miniso
New West Sedation & Gen. Dentistry, North Noodle House, NW - Constituency Office of Peter Julian
Old Spaghetti Factory, Oxford Barber Shop
Pizza Garden
Quesada Burritos - Tacos
Ranstad Canada, RBC Royal Bank *6,065sf*
Shefield & Sons, Shoppers Drug Mart *17,000sf*, Sky Shoes & Repair, Snowy Village, The Spud Shack, Subway *1,340sf*
Thai Herbal Wellness, Tim Hortons *3,000sf*, togo sushi *1,056sf*, Transit Police

TENANTS by Category

Apparel
Footwear: Sky Shoes & Repair

Food
Convenience/Gas: Shefield & Sons
Restaurant/QSR: A & W, AKD Kitchen Soup & Goods, Chicko Chicken, Donair Dude, Freshslice, Hub Restaurant & Lounge, Kushimura Izakaya Japanese Restaurant, North Noodle House, Old Spaghetti Factory, Pizza Garden, Quesada Burritos - Tacos, The Spud Shack, Subway *1,340sf*, Thai Herbal Wellness, Tim Hortons *3,000sf*, togo sushi *1,056sf*
Specialty Food/Drink: Bobacabana Bubble Tea, Candy Alley, Snowy Village

General Merchandise
Beauty/Personal Care: Limina Wellness Lounge & Spa, Oxford Barber Shop
Drug/Health: Shoppers Drug Mart *17,000sf*
Mass Merchandise: Dollar Tree *8,500sf*, Miniso

Leisure

Monday Retail IQ

Fitness: Dynamic Health & Fitness
Wireless/Cable: [Fido](), [Freedom Mobile]()

Non-Retail
Non-Retail: A & H Steel, Aloha Plates, First Capital Realty, NW - Constituency Office of Peter Julian, Ranstad Canada, Transit Police

Services
Educational/Training: CG Masters Academy *5,118sf*
Financial: [CIBC]() *4,698sf*, [H&R Block](), [RBC Royal Bank]() *6,065sf*
Medical/Dental: Launch Rehab, New West Sedation & Gen. Dentistry

Detailed Report

SmartCentres Queensborough Landing

805 Boyd St.
New Westminster BC V3M 5X2
www.queensboroughlanding.ca

Intersection:	Hwy. 91A & Howes St.
Type:	Power Centre
Year Opened:	2002

PHYSICAL ATTRIBUTES

Site Size:	35 acres
GLA (sq.ft.):	435,490
Enclosure:	open
Levels of Retail:	1
Total CRUs:	61
Food Court?	no
Mall has pad sites:	yes
Provides cart/kiosk?	no
Accepts temporary tenants?	
Parking Spaces:	2,080

CONTACTS

Leasing Manager:
Dawn Pagel, SmartCentres , 3200 Highway 7   Vaughan   ON L4K 5Z5   Ph:(905) 326-6400
Fx:(905) 326-0783
Owner:
SmartCentres 3200 Highway 7   Vaughan ON L4K 5Z5   Ph:(905) 326-6400 Fx:(905) 326-0783

TENANT MIX

Apparel%	Food%	GM%	Home%	Leisure%	Service%	Non-Retail%
25.0	36.4	18.2	2.3	2.3	13.6	2.3

Ind%	Chain%	National Chain%
34.1	65.9	43

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%

Monday Retail IQ

3.4   13.8   10.3   17.2   3.4   51.7

ANCHOR TENANTS

[Walmart](#) - 131,770 sq.ft.

TENANTS by Name

[A & W](#), [American Eagle Outfitters](#)
[Banana Republic Factory](#), [BC Cannabis](#), Beauty Supply Outlet, Best Deal Furniture, [Boston Pizza](#), [bulk barn](#)
[Calvin Klein](#), Cambie Physiotherapy and Health Clinic, [Canada Post](#), [Chatters](#), Coast Capital Savings
[GAP](#), GUESS Factory Store
HD Nail Spa, Helly Hansen
Insure BC
[Jiffy Lube](#)
[Kumon](#)
[Marble Slab Creamery](#)
Naan Bites, [Nando's Flame-Grilled Chicken](#)
[Old Navy](#), [OPA! of Greece](#), Orchid Medical Clinic
Pho Express
Queensborough Dental Centre, Queensborough Landing Liquor Store, [Quiznos Subs](#)
[Sleep Country](#), [SoftMoc](#), [Starbucks](#), [Subway](#), [Suzy Shier](#)
[Taco Del Mar](#), [Tim Hortons](#), [Tiny Hoppers](#), [Tommy Hilfiger](#), Tora Sushi
[La Vie en Rose](#)
[Wok Box](#)
4 Elements Martial Arts

TENANTS by Category

Apparel
Athletic Apparel: Helly Hansen
Family Wear: [Old Navy](#), [Tommy Hilfiger](#)
Footwear: [SoftMoc](#)
Ladies' Wear: [Suzy Shier](#), [La Vie en Rose](#)
Unisex Fashion: [American Eagle Outfitters](#), [Banana Republic Factory](#), [Calvin Klein](#), [GAP](#), GUESS Factory Store

Food
Restaurant/QSR: [A & W](#), [Boston Pizza](#), Naan Bites, [Nando's Flame-Grilled Chicken](#), [OPA! of Greece](#), Pho Express, [Quiznos Subs](#), [Starbucks](#), [Subway](#), [Taco Del Mar](#), [Tim Hortons](#), Tora Sushi, [Wok Box](#)
Specialty Food/Drink: [bulk barn](#), [Marble Slab Creamery](#), Queensborough Landing Liquor Store

General Merchandise
Automotive: [Jiffy Lube](#)
Beauty/Personal Care: Beauty Supply Outlet, [Chatters](#), HD Nail Spa
Drug/Health: [BC Cannabis](#)

Monday Retail IQ

Office Supplies: [Canada Post](#)
Specialty Merchandise: [Sleep Country](#)

Home
Furniture/Home Decor: Best Deal Furniture

Leisure
Fitness: 4 Elements Martial Arts

Non-Retail
Non-Retail: Insure BC

Services
Educational/Training: [Kumon](#), [Tiny Hoppers](#)
Financial: Coast Capital Savings
Medical/Dental: Cambie Physiotherapy and Health Clinic, Orchid Medical Clinic, Queensborough Dental Centre

Detailed Report

Westminster Centre

555 6 St.
New Westminster BC V3L 5H1
www.westminstercentre.com

Intersection:	6 St. & 6 Ave.
Type:	Retail Mixed-Use
Year Opened:	1978

PHYSICAL ATTRIBUTES

Site Size:	
GLA (sq.ft.):	135,000
Enclosure:	enclosed
Levels of Retail:	1
Total CRUs:	24
Food Court?	no
Mall has pad sites:	no
Provides cart/kiosk?	no
Accepts temporary tenants?	
Parking Spaces:	

CONTACTS

Leasing Manager:
Donna Bisaro, Uptown Property Group , 330-555 Sixth St.   New Westminster   BC V3L 5H1
Ph:(604) 525-8866 Fx:(604) 525-1387

Property Manager:
Donna Bisaro, Uptown Property Group , 330-555 Sixth St.   New Westminster   BC V3L 5H1
Ph:(604) 525-8866 Fx:(604) 525-1387

Owner & Property Manager:
Uptown Property Group 330-555 Sixth St.   New Westminster BC V3L 5H1   Ph:(604)
525-8866 Fx:(604) 525-1387

TENANT MIX

Apparel%	Food%	GM%	Home%	Leisure%	Service%	Non-Retail%
0.0	39.1	17.4	0.0	4.3	34.8	4.3

Monday Retail IQ

Ind%	Chain%	National Chain%
60.9	39.1	26

Merchandise Price Category (for chains only)

Dis%	Low-Med%	Med%	Med-Upr%	Upper%	N.A.%
0.0	11.1	11.1	0.0	0.0	77.8

ANCHOR TENANTS

London Drugs - 35,000 sq.ft.

TENANTS by Name

Artis Dental Centre
BCAA
Care Point Medical Centres, The Chopped Leaf
Edward Jones
Healthland Clinic, Hub Barber Shop
Liberty Tax Service
McDonald's, Mean Poutine, Mobile Zone
Pizza Pizza, Popeye's Smokeshop
Retina Surgical Associates
Starbucks, Subway
TD Canada Trust *9,000sf*
Uptown Nails
Vancity Credit Union
Waves Coffee House
Yianni's Greek Taverna
Zaaki Mediterranean

TENANTS by Category

Food
Restaurant/QSR: The Chopped Leaf, McDonald's, Mean Poutine, Pizza Pizza, Starbucks, Subway, Waves Coffee House, Yianni's Greek Taverna, Zaaki Mediterranean

General Merchandise
Beauty/Personal Care: Hub Barber Shop, Uptown Nails
Specialty Merchandise: Popeye's Smokeshop

Leisure
Wireless/Cable: Mobile Zone

Non-Retail
Non-Retail: BCAA

Services
Financial: Edward Jones, Liberty Tax Service, TD Canada Trust *9,000sf*, Vancity Credit Union
Medical/Dental: Artis Dental Centre, Care Point Medical Centres, Healthland Clinic, Retina

Monday Retail IQ

Surgical Associates